Intro to Qualtrics at UofC
Overview for CORE 435
Sept. 17, 2019

Heather Ganshorn
Libraries and Cultural Resources
Heather.Ganshorn@ucalgary.ca

Adapted with permission from a presentation by Luc Boyer, UofC Office of Institutional Analysis
Access and Security

• Access uses single sign-on (MyUofC sign-on)
  • Student accounts have some restrictions – see https://oia.ucalgary.ca/qualtrics-login
  • Data stored in Canadian site
  • You MUST NOT collect personal identifiable information or restricted information (e.g. credit card #, passwords, home address, telephone number, etc.) in your survey
Create Your Account or Login

• For new users without a Qualtrics account
  • Go to https://oia.ucalgary.ca/qualtrics-login
  • Read the Acceptable Use Policies and Regulations
  • Click Accept and Login

• For users with a Qualtrics account
  • Go to https://survey.ucalgary.ca/ to log in and create a survey
Survey Based Research
Want to know more about survey design?

- Check out SAGE Research Methods (books and tutorials on research methods)
- Find it under Databases on the library home page
Basic survey issues to consider

**Purpose of the survey:**
- What needs to be known?
- What impact will survey results have?
- Will the results be published?

**Survey Questions:**
- Am I asking the right questions?
- Am I asking too many (or too few) questions?
- Am I seeking nuanced answers?
- Am I allowing respondent to speak?

**Participants Selection:**
- Who will be selected?
- Are they knowledgeable about my survey topic?
- How will they be recruited?
- When will I send my request?
- Will I provide incentives?

**Ethical Concerns:**
- How will I secure voluntary informed consent?
- How will I prevent harm or discomfort to the respondents?
STEP 1
Basic Survey Building
If not done already login to Qualtrics
Go to https://survey.ucalgary.ca/
Create a survey project
Let’s add some questions!
Organize your questions in blocks

1. Consent Block

2. Descriptive text question
   
   This is my cover letter where I will explain the purpose of the survey, why you the participant were selected, whether the survey is confidential or anonymous, whether a response is voluntary, whether any incentives are offered, how long and where the data will be stored, how the data will be disclosed and/or published, who should I contact if I need more information.

3. Multiple choice question, single answer, two choices, vertical layout
   
   By clicking “I agree” below and then clicking “next” you acknowledge that you understand the information above, and indicate your consent to participate in this study.
   
   - I agree
   - I do not agree
By clicking “I agree” below and then clicking “next” you acknowledge that you understand the information above, and indicate your consent to participate in this study.

- I agree
- I do not agree

Add Block

End of Survey
Another block of questions

Descriptive text question

Food Safety Knowledge

In this section we will be asking you questions about safe times and temperatures for cooking and storing foods. Select the best answer.

Multiple choice question, single answer, four choices, vertical layout

If a family member is going to be several hours late for a hot meal, how should you store the meal to keep it safe until this person is ready to eat it?

- store it in the refrigerator and reheat it when the person is ready to eat it
- store it in on the kitchen counter until the person is ready to eat it
- store it in a cool oven until the person is ready to eat it
- store it in a warm oven until the person is ready to eat it
STEP 2
Add Display, Skip, and Branch Logic (if using)
Display Logic

- Allows you to specify that a question should be displayed only if the participant selects a particular response to a previous question.
Skip Logic vs. Branch Logic

• Skip logic is simpler, and more limited
  • Send a particular respondent to the end of the current question block, OR to the end of the survey.
  • Can only be used for ONE of the response options
  • May not do everything you need it to do.

• Branch logic – lets you build in more complicated skips
  • Depending on the response, directs the participant to a different part of the survey
  • Can be used for multiple response options.
  • Can be used to direct respondents to a web page outside of the survey.
Skip logic – send a respondent to end of block OR end of survey

If participant does not agree, send them (skip) to the end of the survey.
Branch Logic – use Survey Flow

If participant does not agree, send them (branch) to a webpage of your choice.
Customize Survey Flow

1. Look & Feel
   - Survey Flow

2. Show Block: Consent Block (2 Questions)
   - Add Below

3. What do you want to add?
   - Cancel
   - Block
   - Branch
   - Embedded Data
   - Randomizer
   - Web Service
   - Group
   - Authenticator
   - End of Survey
   - Reference Survey

4. Show Block: Food Safety Knowledge (2 Questions)
   - Add Below
   - Move
   - Duplicate
   - Delete

5. Add a New Element Here
Customize Survey Flow cont’d.

Survey Flow - Food Safety Knowledge Survey

- Show Block: Consent Block (2 Questions)
- Then Branch If:
  - If: By clicking “I agree” below and then clicking “next” you acknowledge that you understand the information above, and indicate your consent to participate in this study. **I do not agree** is selected.
  - Edit Condition

Options for adding elements:
- Block
- Branch
- Embedded Data
- Randomizer
- Web Service
- Group
- Authenticator

1. End of Survey
   - Reference Survey

2. End of Survey
   - Customize
   - Delete
Customize survey flow cont’d.

Customize End Of Survey

1. **Override Survey Options**
2. **Default** end of survey message.
3. **Custom** end of survey message...
   - No Consent Message
4. **Redirect** to a URL...

- Send additional thank you email from the library...
- Do not increment quota counts.
- Show Response Summary.
- Do NOT record any personal information and remove panel association (not recommended).
- Flag Response As [Screened-Out]
- Do NOT record survey response (not recommended).
STEP 3
Review your Survey and Set Survey Options
Ready to distribute your survey?

Food Safety Knowledge Survey

Survey  Actions  Distributions  Data & Analysis  Reports

Projects  Contacts  Library  Admin  Help

How do you want to distribute your survey?

- Email
- Web
- Social
- Mobile
- Purchase

Send with Qualtrics

Compose Email

Use your own email system

Get a single reusable link

Generate a trackable link for each contact
Any Questions?
Take-aways

• For staff and students...
  • If you are conducting surveys on behalf of the University of Calgary or are doing ethics-approved research, request additional permissions to get access to the UCalgary template, setup group collaboration, increase number of emails, etc.
  • Go to https://oia.ucalgary.ca/qualtrics-account
  • Fill-out online form.

• Support is not far away...
  • Qualtrics Website: https://www.qualtrics.com/support/survey-platform/getting-started/survey-platform-overview/
  • Qualtrics Support: https://survey.ucalgary.ca/
  • OIA Website: https://oia.ucalgary.ca/qualtrics
  • OIA Support: askoia@ucalgary.ca (only for questions related to the previous bullet items, NOT for general tech support)
Additional Slides: Data Visualization with Qualtrics
Analysing Your Collected Responses

Data Analysis Menu

Table Options

Export results into Excel (e.g. PivotTable or PivotCharts)
Reporting Your Collected Responses

Use Reports “Results”

Reporting Menu
Selecting What to Report

Select which questions; select which records (responses)
For each question visualization panel, export into MS Office