

Qualtrics Handouts for Liaisons

Fall 2022



Assessment & Analytics

STUDENT AFFAIRS

Quick help and reference for

qualtrics^{XM}[®]

**The goal of a
survey project is
ultimately to make
informed business
decisions**



We create surveys to make good decisions



01

**Survey
Questions**



02

**Data
Collected**



03

Reports



04

**Business
Decisions**

PLAN & DESIGN

- Start planning at a high level.
- Define the structure of your questions.
- Think about the data that you will need to make decisions.



STAKEHOLDERS

- ✓ Have the decision-makers in mind.
- ✓ Think about the metrics stakeholders will use.
- ✓ Think about what you want to inform as a result of your survey.



LIMIT SURVEY LENGTH

- ✓ Respondents have a limited amount of time.
- ✓ Less questions is always best.



MAKE IT EASY FOR USERS

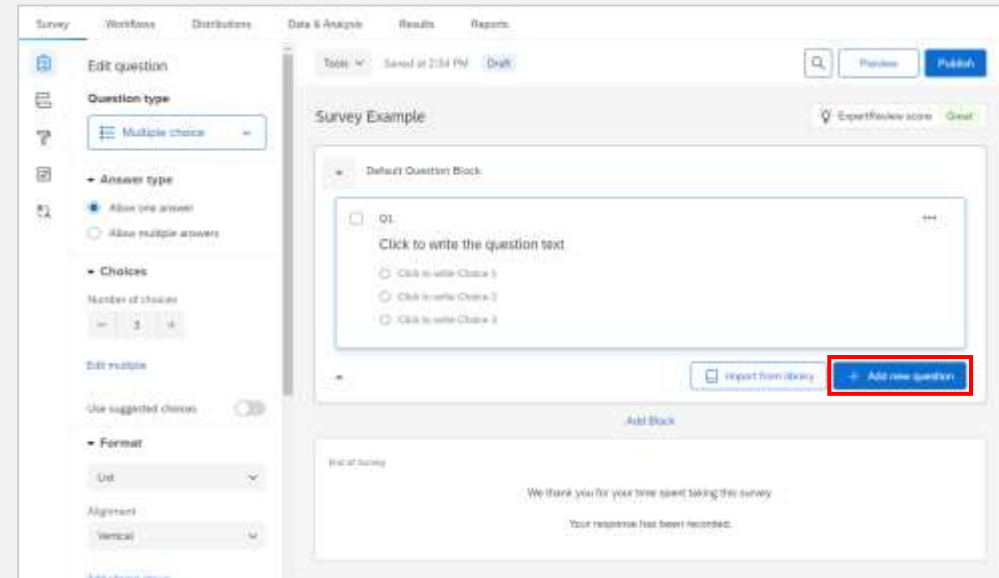
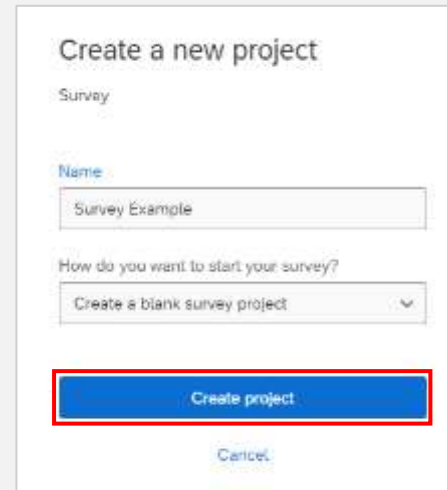
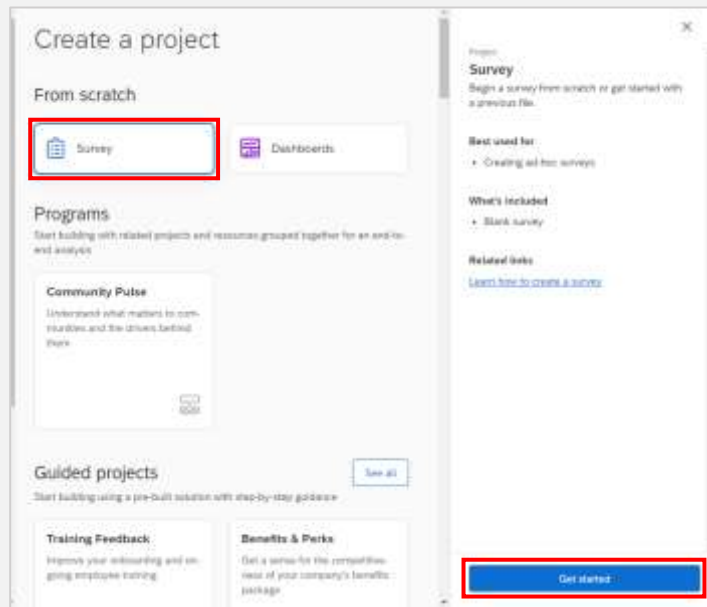
- Limit open-ended questions.
- Caution with grids/matrix tables.
- Avoid leading questions.
- Carefully design answers.



How to: Create a new Survey

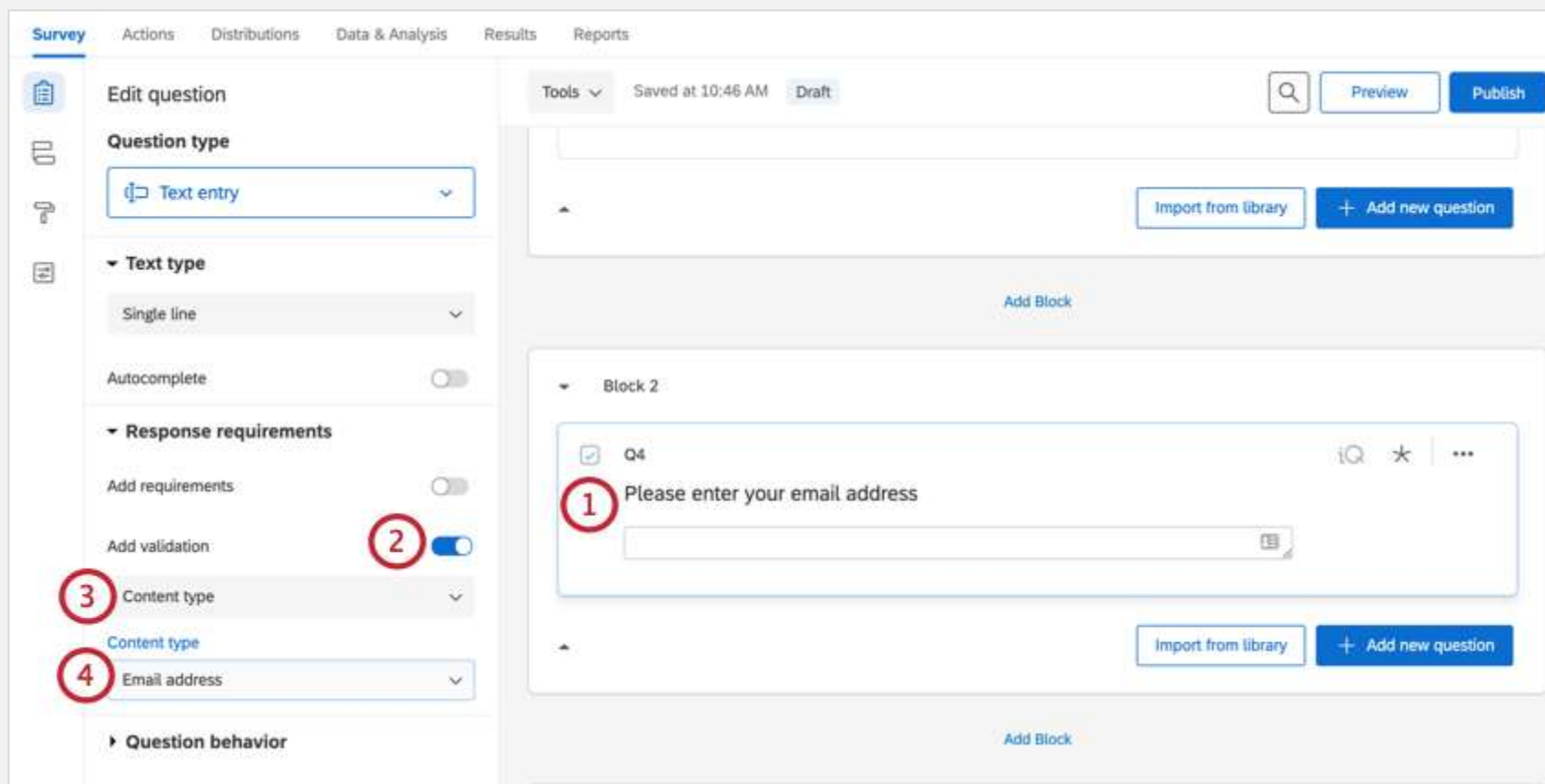


- 1 – Within the Projects option, click **Create project**
- 2 – Select option **Survey** and then click **Get Started**
- 3 – Type a custom name for Survey Project and click **Create project**
- 4 – now start adding questions to your survey



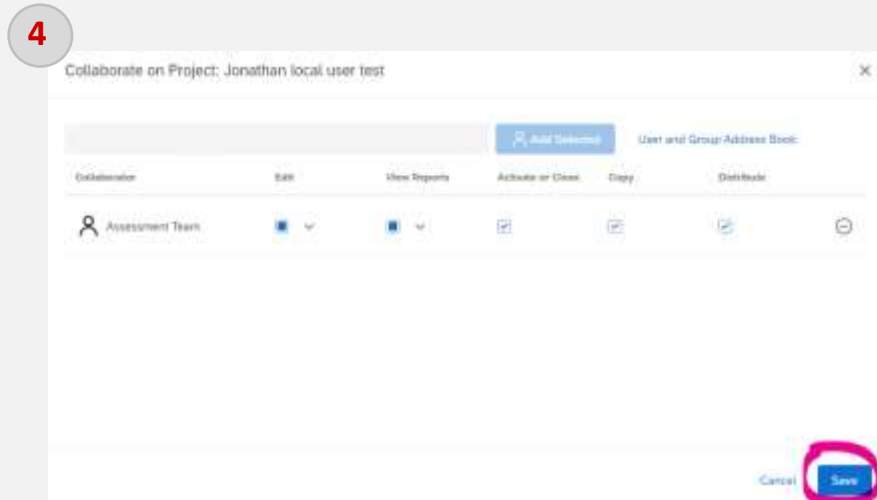
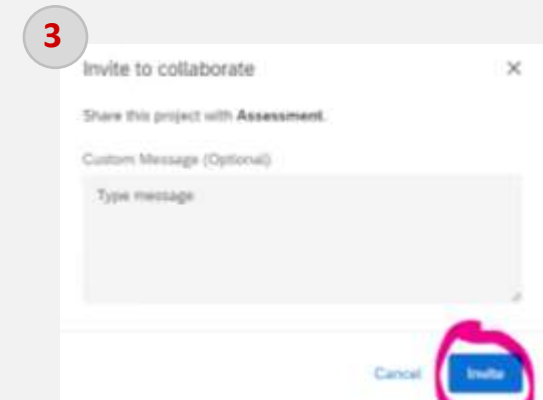
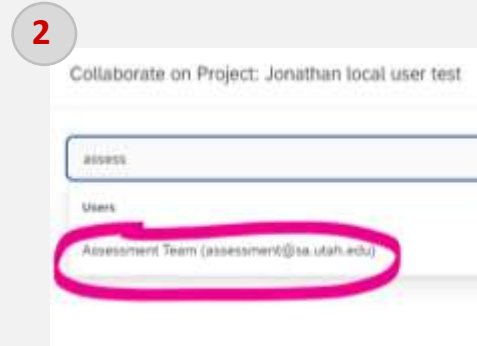
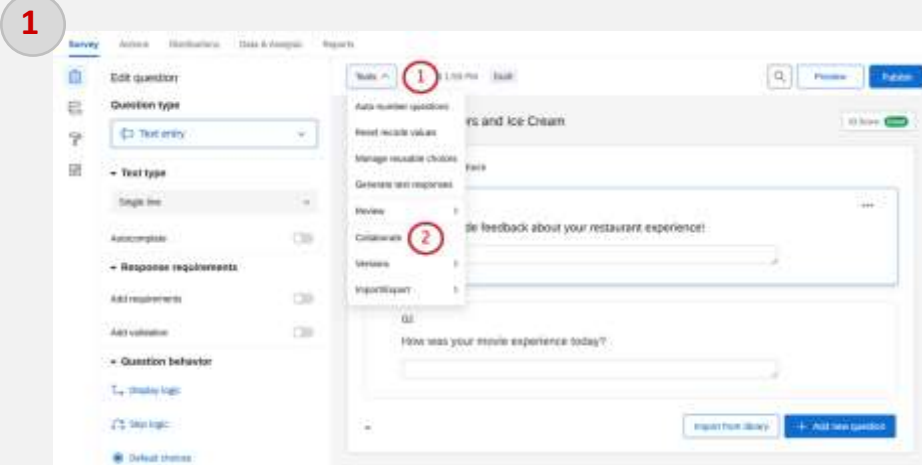


Here we come with some quick tips



- 1 – Select your question
- 2 – Enable **Add validation**
- 3 – Select **Content Type**
- 4 – Choose your content type to base the validation on.

How to: share or collaborate a project



1 – Within the project’s Survey tab, click **Tools** and then **Collaborate**

2 – Type the username. To share (collaborate) with assessment team, type **assessment@sa.utah.edu**

3 – Type a custom message and click **Invite**

4 – Select the checkboxes for the permissions you want to grant and then click **Save**.

How to: **Publish** a Survey



1

1 – Within the survey page, click **Publish**

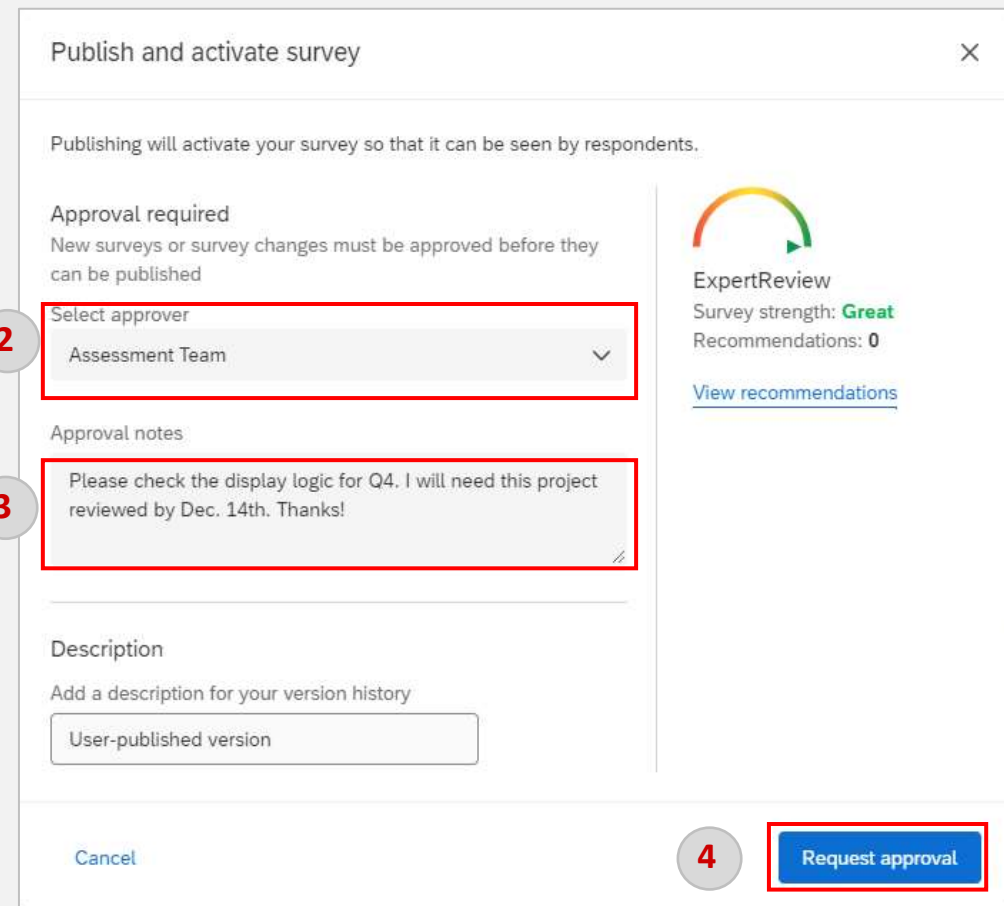
2

2 – in the **Select approver** option, select **Assessment Team**

3

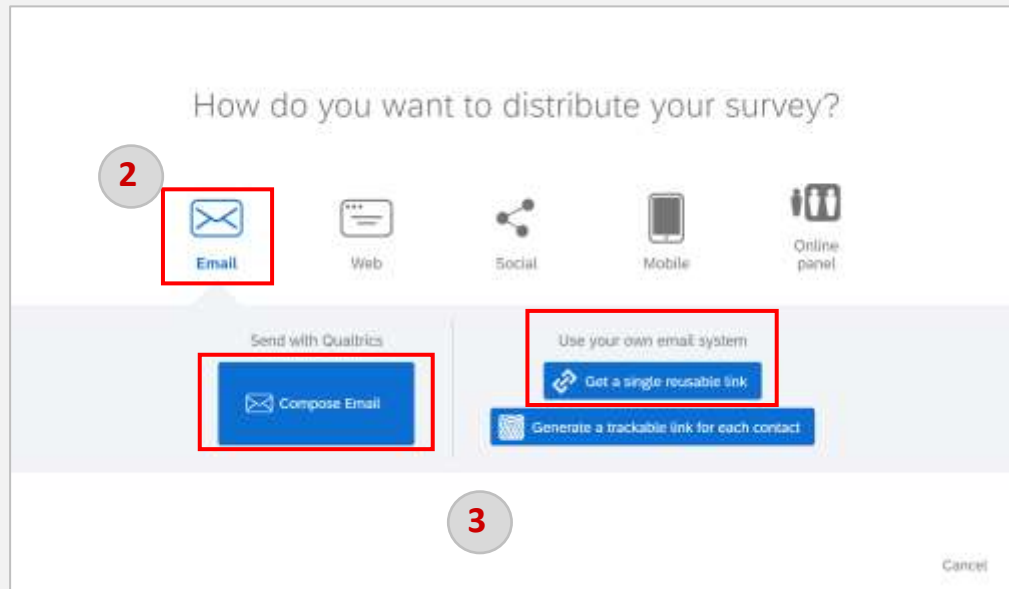
3 – Type a custom note (optional)

4 – Click in **Request approval**



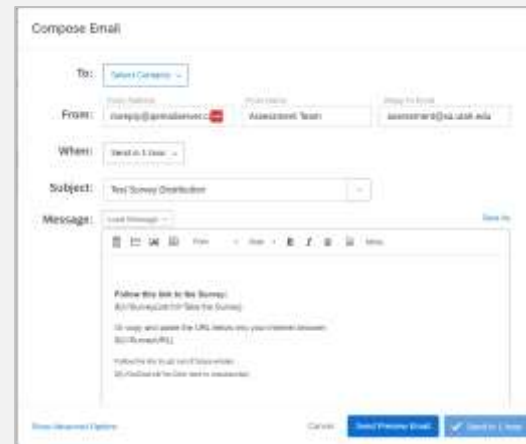
4

How to: **Distribute** a Survey



- 1 – Within the survey page, click the menu option **Distributions**
- 2 – in the pop-up window select **Email**
- 3 – Select the option that you want to use.

Send with Qualtrics



Send with own email system



Do you have 30 minutes?

Highly recommended online course



course access



- Understand stages of a survey
- Why planning a project is important
- Plan with outcomes in mind
- Best practice design principles

Qualtrics

XM basecamp™