



**UNIVERSITY OF CALGARY**  
Office of Institutional Analysis

# Qualtrics Survey Tool Demo

**Grad Success Week 2023**

Jean Gomes, MA, MEd.  
Office of Institutional Analysis

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# Learning Outcomes from this Session

- Navigating the Qualtrics survey tool
- Creating a survey
- Distributing a survey
- Reporting survey results from Qualtrics



Final Remarks and Some Helpful Resources

# Outline

- About UCalgary Qualtrics
- Creating an account / logging in
- Creating a survey
- Distributing a survey
- Reporting results from a survey

Acknowledgement: Content of some of the slides were provided by Phil Johnston, Office of Institutional Analysis.

# About Qualtrics and UCalgary Qualtrics

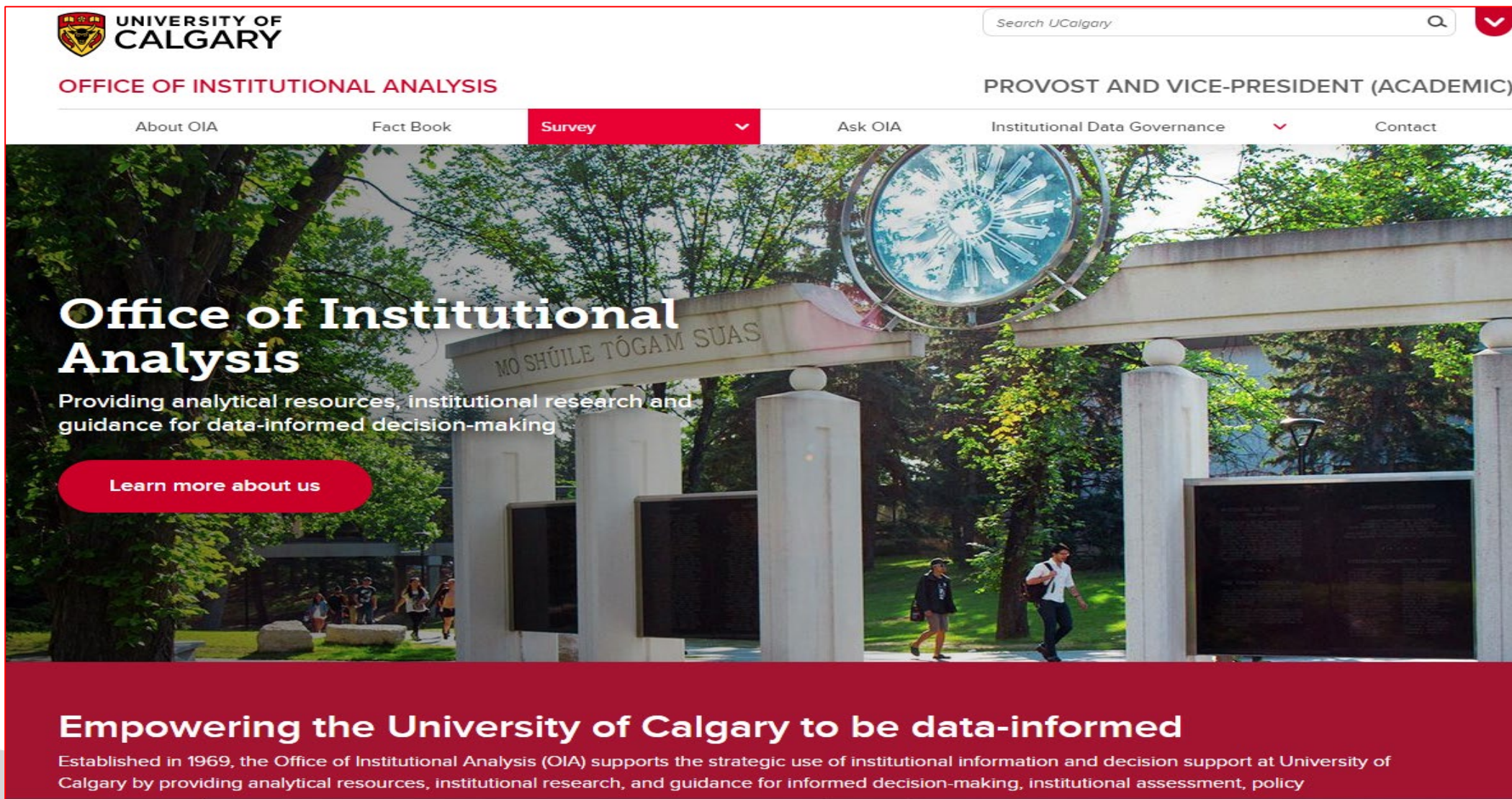
- Very popular survey tool
- Quality of customer support
- Feature-rich survey software
- UCalgary has enterprise license. Students, staff and faculty (researchers and associates) have free access to Qualtrics.
  - Permission is dependent on your role
  - You may request higher level of access
    - E.g., # active surveys, # emails sent out per week, UCalgary branding templates, etc.

- Cleared for data with security classification up to Level 4 (confidential), excluding payment card (credit card), health information that can identify individual.
  - See “Information Security Classification Standard” <https://www.ucalgary.ca/legal-services/sites/default/files/teams/1/Standards-Legal-Information-Security-Classification-Standard.pdf>

- Data are housed in Qualtrics' Canadian site.
- You may collaborate with others inside and outside UCalgary.
- If you already use Qualtrics (e.g., from another university), you can have your survey projects transferred to your UCalgary Qualtrics account.



# Creating your account / logging into Qualtrics ([www.ucalgary.ca/oia](http://www.ucalgary.ca/oia))



The screenshot shows the homepage of the University of Calgary Office of Institutional Analysis. The header includes the university logo, a search bar, and navigation links for 'About OIA', 'Fact Book', 'Survey' (highlighted in red), 'Ask OIA', 'Institutional Data Governance', and 'Contact'. The main banner features a photograph of a university gate with the text 'Office of Institutional Analysis' and 'Providing analytical resources, institutional research and guidance for data-informed decision-making'. A red button labeled 'Learn more about us' is positioned over the banner. Below the banner, a red section titled 'Empowering the University of Calgary to be data-informed' contains a paragraph about the office's mission, established in 1969.

**UNIVERSITY OF CALGARY**

Search UCalgary

**OFFICE OF INSTITUTIONAL ANALYSIS**

PROVOST AND VICE-PRESIDENT (ACADEMIC)

About OIA Fact Book **Survey** Ask OIA Institutional Data Governance Contact

## Office of Institutional Analysis

Providing analytical resources, institutional research and guidance for data-informed decision-making

[Learn more about us](#)

### Empowering the University of Calgary to be data-informed

Established in 1969, the Office of Institutional Analysis (OIA) supports the strategic use of institutional information and decision support at University of Calgary by providing analytical resources, institutional research, and guidance for informed decision-making, institutional assessment, policy





## OFFICE OF INSTITUTIONAL ANALYSIS

## PROVOST AND VICE-PRESIDENT (ACADEMIC)

[About OIA](#)[Fact Book](#)[Survey](#)[Ask OIA](#)[Institutional Data Governance](#)[Contact](#)

### SURVEY OVERVIEW

[Accessing Qualtrics](#)[Help and Support Centers](#)[Documents and Training](#)[Qualtrics Login](#)

# Office of Institutional Analysis

Providing analytical resources, institutional research and  
guidance for data-informed decision-making

[Learn more about us](#)



Requires multi-factor authentication (MFA)

# Central Authentication Service



**UNIVERSITY OF  
CALGARY**

Sign In

[Register an IT Account](#) | [Forgot password?](#) | [Account FAQs](#) | [Contact IT Support](#)



# Verify your identity



Text +X XXXXXXXXX60



Call +X XXXXXXXXX60

[More information](#)

Are your verification methods current? Check at  
<https://aka.ms/mfasetup>

Cancel

Do **NOT** login into  
Qualtrics directly through  
the company website.

ucalgary.Qualtrics.com

Or, go through OIA's website,  
<https://www.ucalgary.ca/provost/oia>



# Creating a Survey (Qualtrics “projects”)

- Survey creation
- Question types
  - Multiple Choice
  - Rating Scales, Likert Scales
  - Rank, Pick, Order
  - Open-ended
  - Can insert media (graphics & video)
- Display and skip logic – e.g., consent
- Data validation – setting conditions for response requirements
- Mandatory or voluntary response
- <https://www.qualtrics.com/support/survey-platform/my-projects/creating-a-project/>
- <https://www.qualtrics.com/support/survey-platform/survey-module/survey-module-overview/>





XM

☰

Projects

☆ Starred 0

Shared with me 30

Your folders

▼ Projects and Programs 40

D2L 2

Shared with me

All project types ▾

All statuses ▾

Q Search...

Owner ↕

Last modified

⚙

☆	📅	PRIMO User Experince Feedback Dialog	Active	—	Website / App Feedback	Matthew Black	Apr 25, 2023	...
☆	📅	Test	Active	—	Website / App Feedback	Matthew Black	Aug 8, 2022	...
☆	📄	First Year Undergraduate Student Survey	Closed	1477	Survey	Luc Boyer	Sep 8, 2021	...
☆	📄	Together in a Good Way	Active	14	Survey	Luc Boyer	Jan 16, 2019	...
☆	📄	Together in a Good Way Draw Form	Active	0	Survey	Luc Boyer	Nov 7, 2018	...

Enter Collaboration Code

Create project



Survey

Workflows

Distributions

Data & Analysis

Results

Reports



Edit question



Question type



▼ Answer type

- ☒ Allow one answer
- ☐ Allow multiple answers



▼ Choices

Number of choices

−

3

+

[Edit multiple](#)

Use suggested choices



▼ Format

Tools ▾

Saved at 9:06 PM

Draft



[Preview](#)

[Publish](#)

## Grad Success Week Qualtrics Demo



ExpertReview score

Great

▼ Default Question Block



Q1



Click to write the question text

- ☐ Click to write Choice 1
- ☐ Click to write Choice 2
- ☐ Click to write Choice 3



Import from library



Add new question

[Add Block](#)



Survey

Workflows

Distributions

Data & Analysis

Results

Reports



## Options



### General

Language, title, survey description



### Responses

Survey expiration, incomplete responses, back button and more



### Security

Passwords, file uploads, bot detection and more



### Post-Survey

Thank you emails, completed survey messages, and triggers

### Advanced

#### Scoring

Attach point values to specific answers

#### Quotas

Saved at 9:49 PM

Live



Off

### Add a referral website URL

Allow people to take your survey only if they select a survey link included on a specific website.



Off

### Prevent multiple submissions

Prevent respondents from taking your survey multiple times. You can choose to end the survey, redirect them to a website or flag the response.



On

Action

End survey with a message ▾

End of survey message

☒ Default

☐ Custom



## Options



## General

Language, title, survey description



## Responses

Survey expiration, incomplete responses, back button and more



## Security

Passwords, file uploads, bot detection and more



## Post-Survey

Thank you emails, completed survey messages, and triggers

## Advanced

## Scoring

Attach point values to specific answers



Saved at 9:49 PM

Live

☐ Custom

## Bot detection

We'll look for bots that might be taking your survey and flag their responses with an embedded data field (reCAPTCHA). [Learn more about bot detection](#)

☒ On

## Security scan monitor

Prevent security scanners from accidentally starting surveys when they test your link (reCAPTCHA). [Learn more about security scan monitor](#)

☐ Off

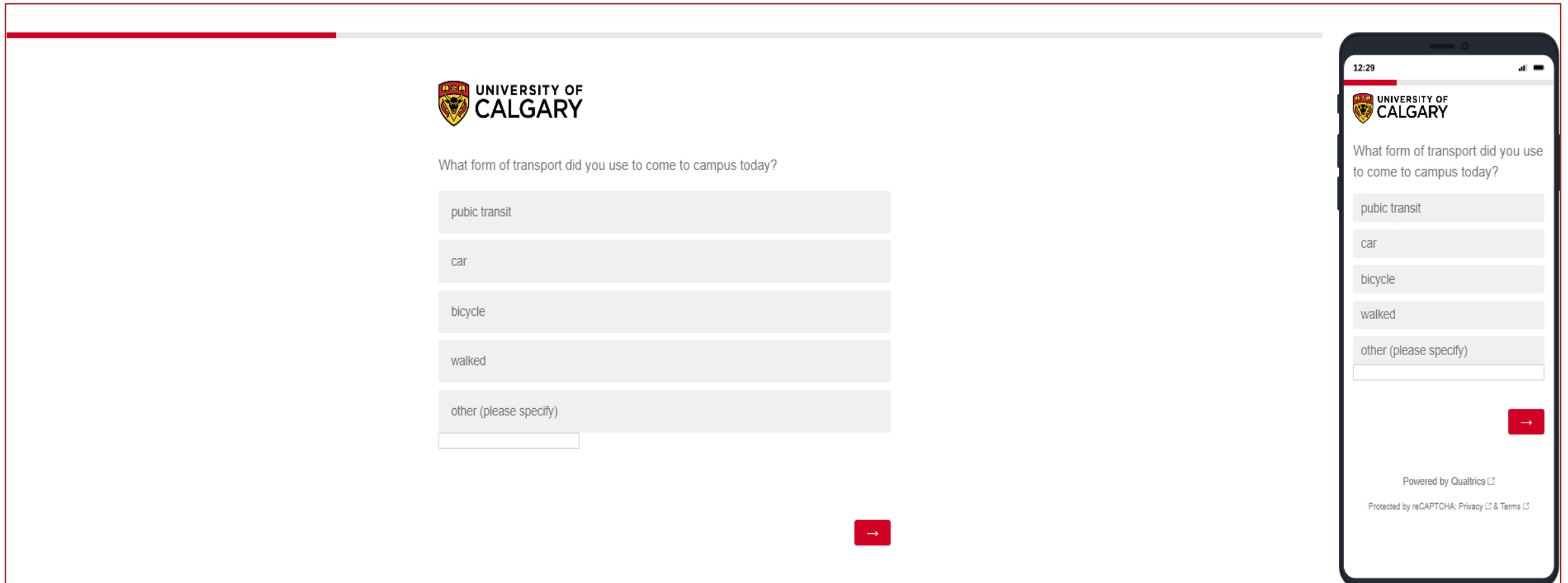
## RelevantID

Analyze a respondent's browser, operating system, and location to prevent fraudulent responses. [Learn more about RelevantID](#)

☐ Off



Use **LOOK AND FEEL** .... progress bar; forward and back buttons.  
Preview shows your survey on mobile devices.



The image displays a survey interface for the University of Calgary. On the left, a desktop view shows the survey question: "What form of transport did you use to come to campus today?". Below the question are five radio button options: "pubic transit", "car", "bicycle", "walked", and "other (please specify)". A red arrow button is located at the bottom right of the desktop form. On the right, a mobile device preview shows the same survey question and options, adapted for a smaller screen. The mobile preview also includes a red arrow button and footer text: "Powered by Qualtrics" and "Protected by reCAPTCHA: Privacy & Terms".

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What form of transport did you use to come to campus today?

pubic transit

car

bicycle

walked

other (please specify)

→

12:29

UNIVERSITY OF CALGARY

What form of transport did you use to come to campus today?

pubic transit

car

bicycle

walked

other (please specify)

→

Powered by Qualtrics

Protected by reCAPTCHA: Privacy & Terms

# Distributing a Survey

- Can be anonymous links
  - Can use personalized links which has a lot of benefits
  - Can set it up so that only invited people participate
  - Can prevent people from taking a survey more than once
  - Can schedule emails
  - Reminder emails
- <https://www.qualtrics.com/support/survey-platform/distributions-module/distributions-overview/>
  - <https://www.qualtrics.com/support/survey-platform/distributions-module/email-distribution/emails-overview/>



Grad Success Week Qualtrics Demo ▾

[Survey](#) [Workflows](#) [Distributions](#) [Data & Analysis](#) [Results](#) [Reports](#)

## How do you want to distribute your survey?

Email

Web

Social

Mobile

Online panel

Send with Qualtrics

Compose Email

Use your own email system

Get a single reusable link

Generate a trackable link for each contact



Survey

Workflows

Distributions

Data & Analysis

Results

Reports



Pause response collection



Distribution summary



Anonymous link



Emails



Personal links



Text message (SMS)



Social media



Offline app



QR code



Downloads

## Get an anonymous survey link

Paste this reusable link into emails or onto a website; it can't be tracked, and can't be used to identify respondents

[https://survey.ucalgary.ca/jfe/form/SV\\_9zscNzNp19RUFqC](https://survey.ucalgary.ca/jfe/form/SV_9zscNzNp19RUFqC)

Read-only

Copy survey link



# Reporting Survey Results

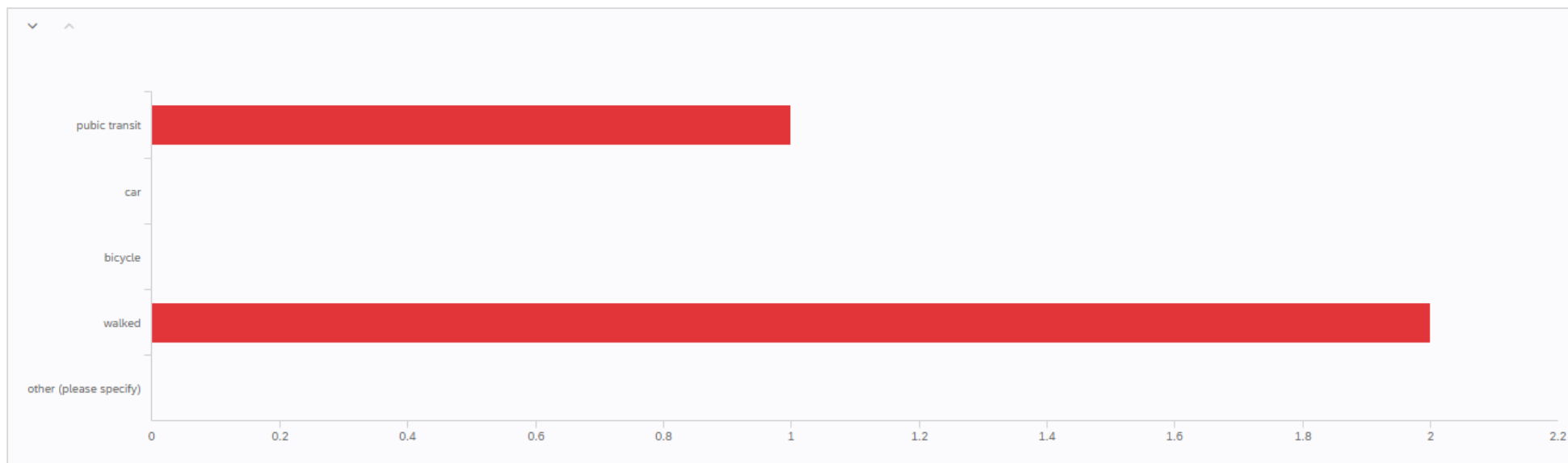
- Can create your own customized reports
- Can create at the click of a button presentations about results into MS Word, PowerPoint, and Adobe
- Can export data to SPSS, Excel, csv
- Export text and analyse in NVivo, for example

- <https://www.qualtrics.com/support/survey-platform/reports-module/results-vs-reports/>
- <https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data-and-analysis-overview/>



Q1 - What form of transport did you use to come to campus today?

Page Options ▾



Metric

Default (Choice Count) ▾

Decimal Places

Default (2) ▾

Breakout By

Default (None) ▾

Title

☐ Default - Click to edit

Visualization



Display Options

☐ Sort Bar Values

Descending ▾

☒ Show X Axis

Horizontal ▾

☒ Show Y Axis

☐ Truncate Labels

☐ Show Bar Labels

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	What form of transport did you use to come to campus today? - Selected Choice	1.00	4.00	3.00	1.41	2.00	3

## Getting Help

- Qualtrics job aids
- Qualtrics user community / message board
- Ucalgary Qualtrics website: <https://www.ucalgary.ca/provost/oia/survey>
- Other questions can be directed to [askoia@ucalgary.ca](mailto:askoia@ucalgary.ca)
- UCalgary Qualtrics brand administrators (super-user access): Philip Johnston (Qualtrics support lead) and Jean Gomes, Office of Institutional Analysis



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**Thank you for attending this  
Qualtrics session!**