Qualtrics Training for Instruction-Related Forms

What is Qualtrics & what will we be using it for?
Qualtrics is an online survey tool to create, distribute, and analyze and store survey results. Qualtrics will be replacing the Excel instruction statistics worksheet and allow us to automatically compile our instruction statistics and analyze them to look at short-term and long-term considerations for the Instruction Program.

This document will go over how to do specific things within Qualtrics, and is not meant to serve as a total overview of how to use Qualtrics.

How to Access Qualtrics
You can access Qualtrics here: https://csus.qualtrics.com. You’ll need to login using SacLink.

What’s in Qualtrics?
As of 8/30/2018, surveys and results that are in Qualtrics for the Instruction Program:

<table>
<thead>
<tr>
<th>Area</th>
<th>Purpose</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sac State Library Instruction Statistics</td>
<td>Tracking face-to-face, synchronous library instruction statistics on an individual and programmatic level</td>
<td>Owner</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Library Instruction Coordinator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>View Reports</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reference &amp; Instruction Department Librarians</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SCUA Archivists</td>
</tr>
<tr>
<td>Student Reflection Form</td>
<td>Gathering feedback from students who attend library instruction sessions. Goal is for students to reflect on what they learn and for librarians to get input on how their teaching contribute to students’ perceptions of research skills, as well as continually reflect and identify areas for growth in teaching.</td>
<td></td>
</tr>
</tbody>
</table>

Questions about the permissions levels in Qualtrics?
Details about Permissions levels can be located on the Qualtrics site.

Tasks You Should Know How to Do in Qualtrics
1. Viewing individual data
2. Viewing program-level data
3. Creating individual instruction reports, including statistics and student reflection form feedback
New Users in Qualtrics

If you are a first-time Qualtrics user, please follow these steps:

2. Log in with your SacLink ID and password.
3. You will be asked if you have an existing login.

4. Select **No, I don’t have a preexisting account here.**
   
   a. Note: If you do not receive this message and are taken to the main page of Qualtrics, it means you’ve already set up an account and are ready to use Qualtrics.

5. You will be asked to accept the Terms of Service, and it will take you to the main page of Qualtrics, and you are now ready to use Qualtrics.
Signing In With a Pre-Existing Account

To log into Qualtrics, go to the following link: http://csus.qualtrics.com/

Upon logging into Qualtrics, your landing page should have the two following programmatic surveys:

- **Student Reflection Form**
  - Status: ACTIVE
  - Questions: 10
  - Responses: 1

- **Sac State Library Instructors Statistics**
  - Status: ACTIVE
  - Questions: 12
  - Responses: 7
Step-by-Step Instructions for Qualtrics

Once you are at the landing page for the surveys you are a part of in Qualtrics, to access survey data, select the survey. The following drop-down list will appear:

For viewing the survey, you have the option to Preview Survey.

For looking at survey responses, the two features that are relevant are the Data & Analysis option as well as the View Reports option. This document will go into some ways to extract relevant data based on these two options.
Setting up your Surveys to Export All Data

By default, many surveys will not have every question selected for export. These instructions will guide you through that process. This feature may be helpful for you as you report your teaching to the ARTP Committee.

1. When you select a survey title, Select **Data & Analysis** from the Qualtrics main page.
2. If this is your first time using Qualtrics, select **Tools → Choose Columns** → select all Questions (in this instance, Q1 – Q11 for the Instruction Statistics). This will enable all survey questions to be exported.
**Note:** After you add these fields, double-check the order of your data (Q1 – Q11). They may not be ordered numerically, and you may want to click on the Question Number/Variable as demonstrated below and move the question to the left or right as appropriate, as they will appear in that order once you download to Excel.

<table>
<thead>
<tr>
<th>Q1 - Librarian</th>
<th>Q2 - Professor’s Last Name</th>
<th>Q4 - Class (e.g. PSYC 8; ENGL 20)</th>
<th>Q3 - Subject Area/Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lynn Drennan</td>
<td>sample2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anne</td>
<td>sample</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Viewing your Personal Statistics

Note: We will use the Instruction Statistics in this document, but the same process applies for the Student Reflection Form and any other Qualtrics Survey.

When you select a survey title, a pop-up will appear. Data & Analysis and View Reports will allow you to view your individual personal statistics. These instructions will show both options.

Viewing your Personal Statistics | Option 1: Data & Analysis

1. From the Qualtrics homepage, select a survey whose data you would like to view. Then select Data & Analysis from the drop-down menu that appears.

2. The page you will see defaults to all input data. To filter to your individual statistics, complete the following steps:
   a. Select Add Filter and Q1 – Librarian from the menu that appears. [NOTE: Q# will be dependent upon the exact survey; this is in relation to the Instruction Statistics form].
   b. Click Select Operator – Includes Any.
   c. Click Select Operand – [Your Name].
3. After you have filtered to your individual data, if you would like to proceed to exporting your data into Excel, select Export & Import → Export Data

4. A pop-up will appear (Download Data Table). Deselect Download All Fields → select Download

   a. Depending on your Browser, the .zip may automatically download the file or you may be prompted to save the file. If prompted, Save the File.
5. This pop-up will show, and the .zip file will either open automatically or will show up at the bottom of the browser.

![Manage Downloads](image)

6. Open the .zip file and you should see your Excel file and be able to open it!

**Working with your Individual Instruction Statistics in Excel**

You may want to do a couple of things with your Excel worksheet to clean it up a bit. Both are not necessary, but may help get rid of some visual clutter and make the file easier to read.

*This could also be helpful for your RTP file.*

1. Select **Ctrl + A** to select all of the worksheet, and select **Wrap Text** to read all of the text.

2. Delete the entire 3rd row - this is an import field from Qualtrics.
Viewing your Personal Statistics | Option 2: View Reports

This feature will allow you to create a visual representation of the survey data.

1. From the Qualtrics homepage, select a survey whose data you would like to view. Then select View Reports from the drop-down menu that appears.

2. The page you will see defaults to all input data, a visualization labeled Default Report. To filter to your individual statistics, complete the following steps:
   a. Click Add Filter and Q1 – Librarian from the menu that appears. [NOTE: Q# will be dependent upon the exact survey; this is in relation to the Instruction Statistics form].
   b. Click Select Operator – Includes Any.
   c. Click Select Operand – [Your Name].

Your field should look similar to the following:

3. From here, you are technically done. Here are some of the things you can do with these visualizations:
   a. Create a personal report (see below). This will allow you to create your own unique visual report by applying one or more filters and saving those filters with a report name.

   b. Export the visualizations to PowerPoint, PDF, MS Word, and/or Excel.
Creating a Personal Report

This essentially is the same as Viewing Reports, but allows you to create a saved report based on unique filters you apply. If you would like to create a visual report for your instruction that is saved, follow the steps below:

1. From the Qualtrics homepage, select a survey whose data you would like to view. Then select View Reports from the drop-down menu that appears.

2. Select Default Report → Create New Report

   ![Create New Report](image)

3. A pop-up will appear prompting you to name the report. A good default is [Name] [Survey Name] as shown in the image above. We will create a report for Ben Amata in this example. Type your Report Name and select Create.
4. This is where you will want to add filters to make the report unique to your data. To filter to your individual statistics, complete the following steps:
   a. Click Add Filter and Q1 – Librarian from the menu that appears. [NOTE: Q# will be dependent upon the exact survey; this is in relation to the Instruction Statistics form].
   b. Click Select Operator – Includes Any.
   c. Click Select Operand – [Your Name].

Your field should look similar to the following:

![Image of filter interface]

Now, you have a saved report that is specific to an individual librarian. If you would like to add more filters (e.g. professor, subject, date, you can select the -/+ signs on the far right of the image above.

**Questions & Assistance with Qualtrics**

If you have any questions whatsoever about this document or would prefer to meet to learn how to view/extract your data from Qualtrics, please do not hesitate to contact Samantha McClellan at s.mcclellan@csus.edu.