umSurvey

Qualtrics

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** This work contains content adapted from the Qualtrics Documentation at https://www.qualtrics.com/support.*

Purpose

This documentation highlights features of umSurvey (Qualtrics), how to log in, create surveys, and navigate throughout.

Audience

This documentation is designed for University faculty, students, and employees that will be using umSurvey (Qualtrics).

What is umSurvey (Qualtrics)?

umSurvey (Qualtrics)

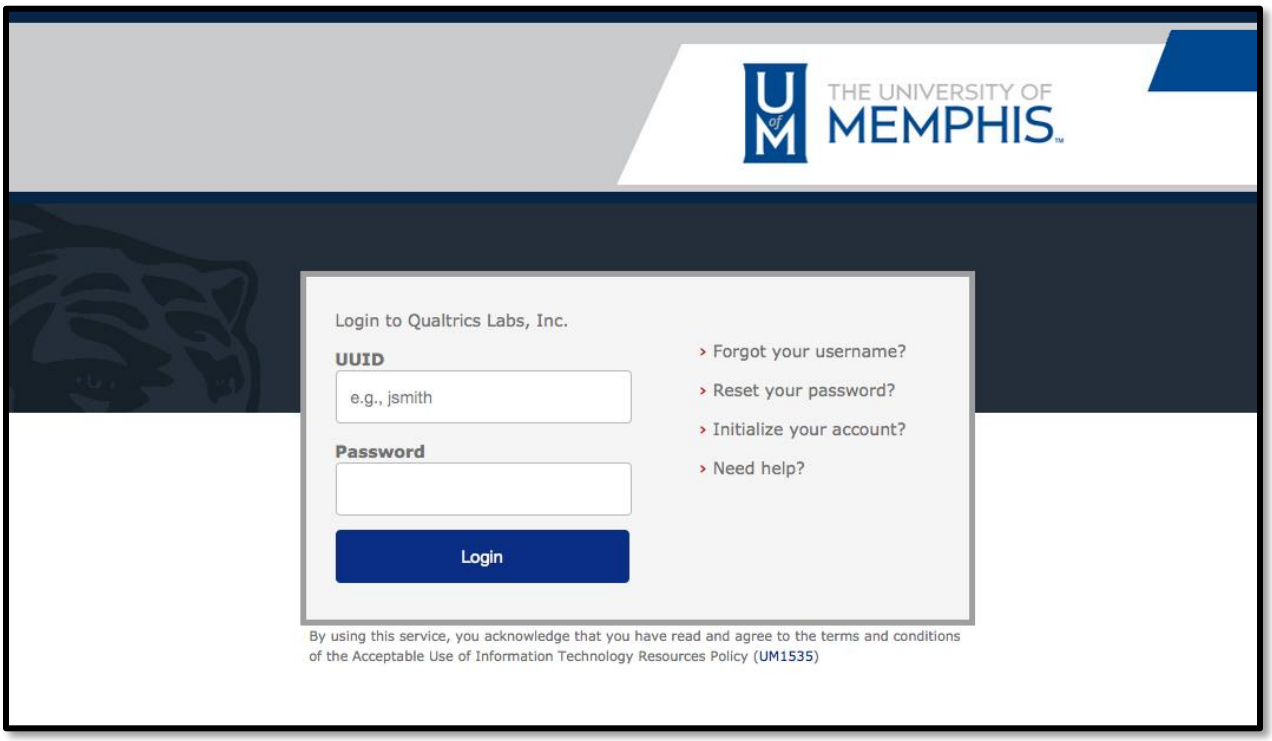
umSurvey is survey services provided by Qualtrics at the University of Memphis. This service can be used to create, distribute, and analyze surveys. The software has advanced reporting capabilities, social media integration, and extensive collaboration opportunities.

Logging in to the umSurvey (Qualtrics)

To access the umSurvey (Qualtrics), use your University of Memphis Universal User Identification (UUID) and password. The UUID and password required to enter umSurvey (Qualtrics) are the same as those used to login to your University e-mail and other University computer resources**. Note:** *When signing into Qualtrics use your original UUID and not a preferred email address.*

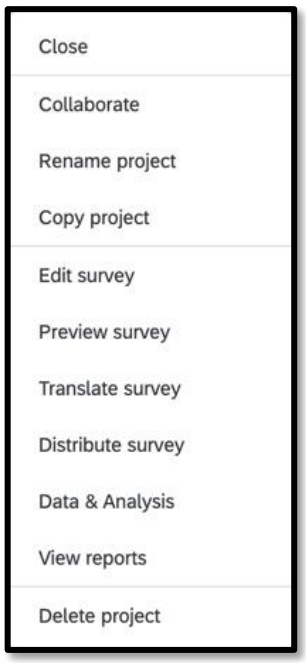
1. Go to: umSurvey and enter your UUID and password.
2. Click **Login**. The umSurvey (Qualtrics) Home page will display.
3. Authenticate with DUO.

NOTE: The myMemphis Portal UUID and password are case sensitive.
If you have trouble, contact your local technical support provider or you may visit the self-service portal at iam.memphis.edu. Authenticate with DUO.



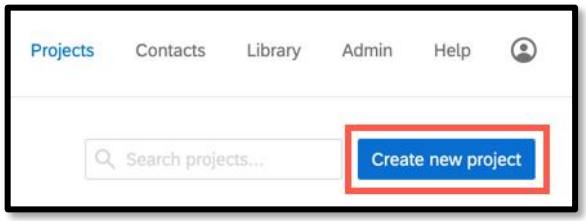
Every time you log in to Qualtrics the **My Projects** tab will be open. This tab is a list of the surveys you have created and surveys that have been collaborated with you. In line with each survey are shortcuts to survey tasks, such as, pausing the survey response collection, editing, previewing, translating, distributing, analyzing data and analysis, viewing reports, and deleting a survey. This is also where you will reveal the survey in a folder, rename the project, copy the project, or share the project.

A Larger view of highlighted area.

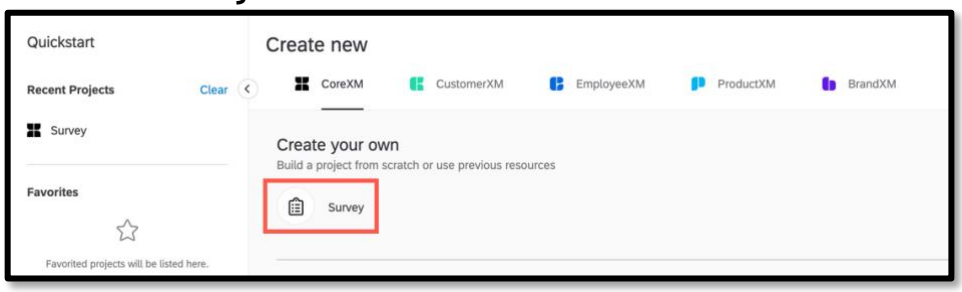


Creating a new Survey

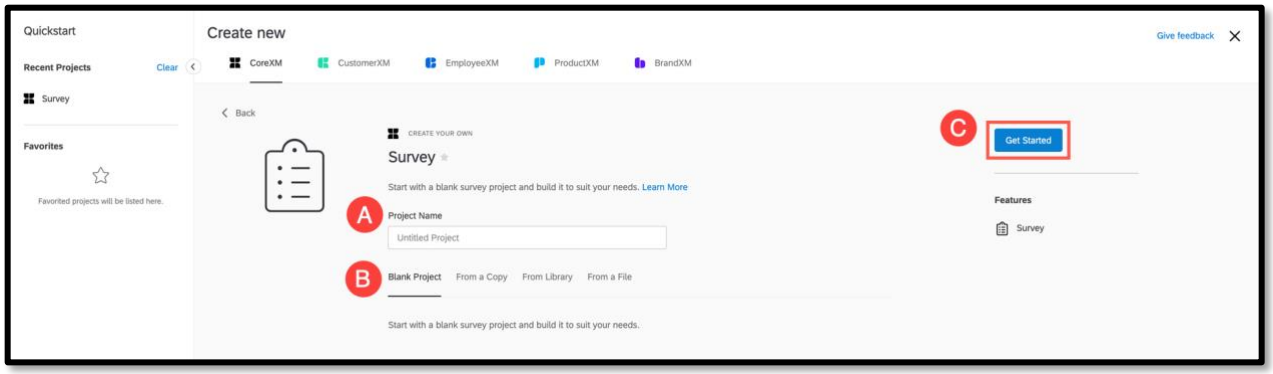
To create a new survey, click on the **Create Project** button located at the top right-hand corner below the menu. As you are working on your survey, it will be automatically saved for your convenience.



Next, you will be presented with choices to create your survey/project. You can create a new survey/project, as well as, create from a copy of an existing survey/project, from a library or from a file. If you are creating a brand-new project (**Blank Survey Project**), you can name the project/survey. When you have finished click **Create Project**.



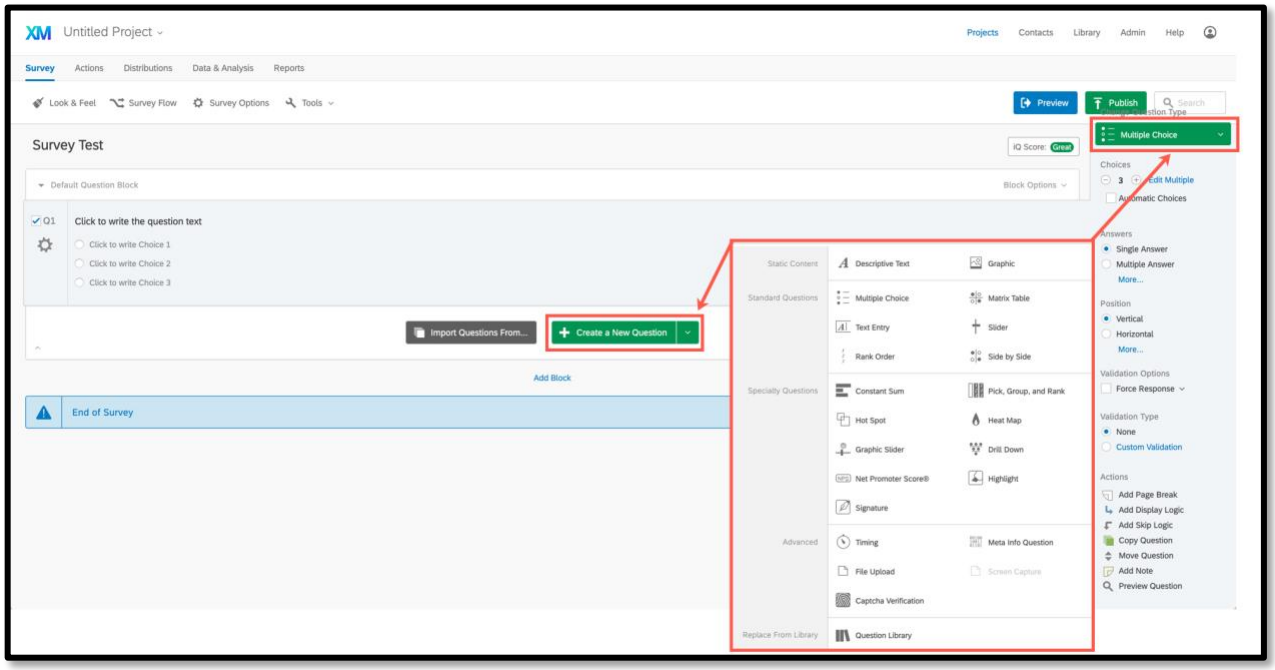
You are now ready to begin creating a new survey. To begin creating a survey click on A) the Project Name and give your survey a title, B) Choose the type of project/survey you will be creating, Then C) Click Get Started.



You are now ready to begin creating questions.

The Project will open with your first question created by default.

Once you create a question, you will need to decide the format of the question. When you begin to create the new survey there are two places to choose your question format. A multiple-choice question will be created by default. To change the question type, click the **Change Item Type** drop-down, then select the question type.



Question Types

Static Content:

Descriptive Text - For instructions and other written information you'd like to display for your participants.

Graphic - You can display a graphic to the participant without asking for feedback.

Standard Questions:

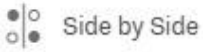
Multiple Choice - The Multiple-Choice question allows the respondent to choose one or multiple options from a list of possible answers. The variations include: single answer, multiple answer, dropdown list, select box, and multi select box.

Matrix Table - Used to collect multiple pieces of information in one question. The variations include: linkert, bipolar, rank order, constant sum, text entry, profile, and maxdiff.

Text Entry - Used to gather open-ended feedback from participants. The 5 types of entry variations include: single line, multiline and essay, form, password, choice and text entry.

Slider - Allows the user to indicate their level of preference with a draggable bar rather than a traditional scale point.

Rank Order - Used to determine each participant's order of preference for a list of items.



Side by Side - Used to ask multiple questions in one condensed table.

Specialty Questions:

Constant Sum - Collects numeric data and displays sum to participant.

Pick, Group, and Rank - Used for sorting activities where participants place items in groups.

Hot Spot - Participants interact with regions of an image, often used in usability testing and concept testing.

Heat Map - Participants click on significant points on an image. Unlike Hot Spot, regions you define are hidden.

Graphic Slider - A variation of a slider question which allows participants to change a frown to a smile. These formats can be particularly useful for younger audiences or for simple satisfaction feedback.

Drill Down – Used to help participants choose from a long list of options.

Net Promoter Score - Net Promoter Score®, commonly referred to as NPS®, is a customer loyalty metric that gauges how willing a customer is to recommend a product or service.

Highlight - The Highlight question type allows you to present survey participants with an interactive text sample. Participants can select words from the text and evaluate using criteria you choose. For example, whether they like or dislike the selected text.

Signature - The Signature question type presents survey participants with an entry box where they can draw their signature. On a desktop, they can use their mouse, and on a mobile device they can use their finger.

Advanced (Tracking Questions):

Timing - A hidden question that can be added on any page of your survey to manage how long a participant spends on that page.

Meta Info Question - A hidden question that will track and report basic information about your participants, such as their operating system and browser.

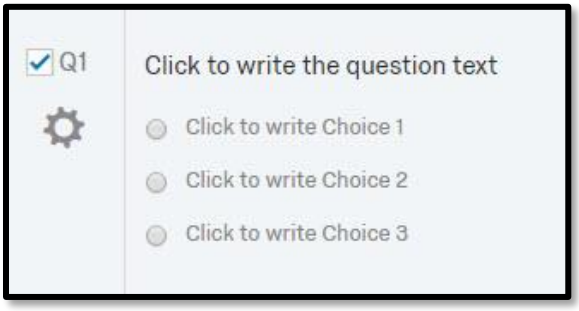
Captcha Verification - Captcha verification is a common web technique to ensure that your visitors are real humans and not a program written to spam your survey.

File Upload – Creates a question with a space to upload a pic file or pdf.

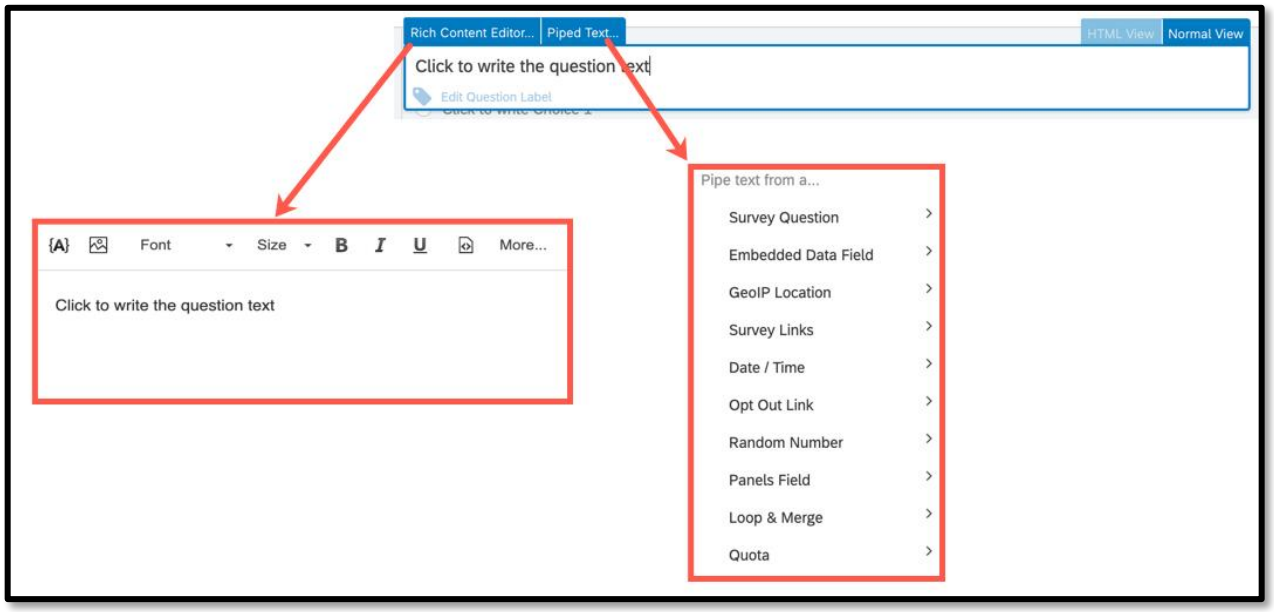
Question Library – Allows one to create a question from a library database.

Editing a Question

You are now ready to edit your question. Click on **Click to write the question text** to edit the question.



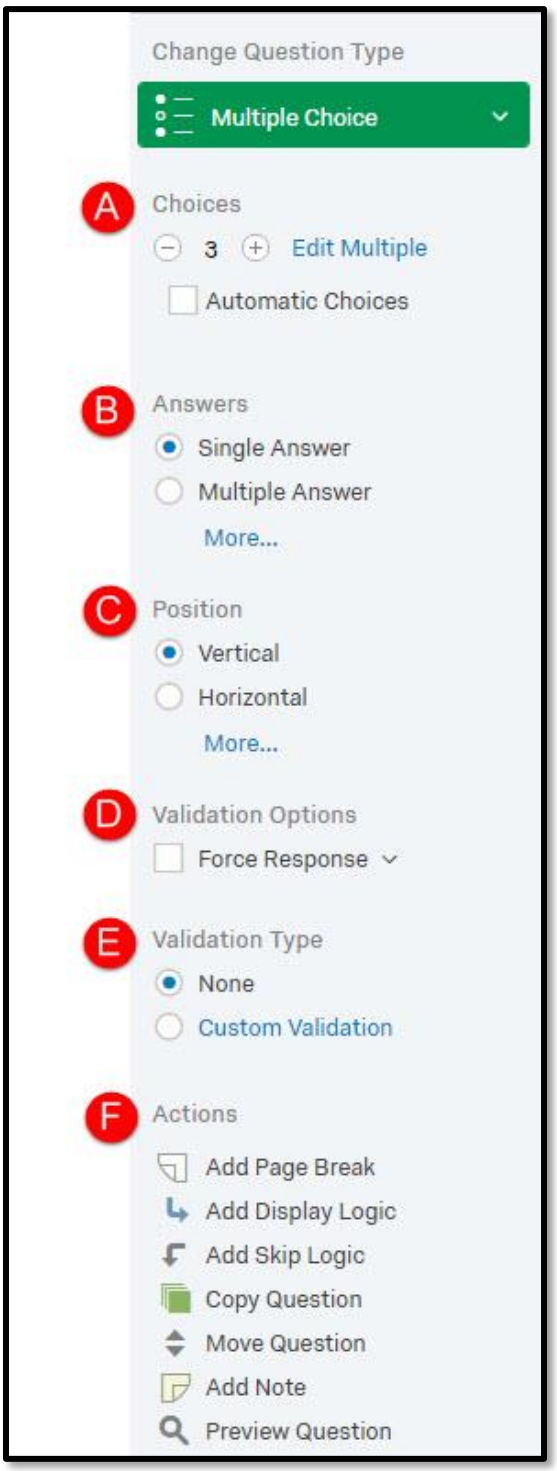
Once you have clicked you will see this menu appear. You can type your question in the provided space.



The **Rich Content Editor** will allow you to format your text. Whenever your text needs special formatting such as images or colored text, use the **Rich Content Editor**.

With **Piped Text**, you can customize question and choice wording for each participant. When you add **Piped Text** to your survey, it will appear as a line of code.

There are other project/survey question formatting options available. Located beneath the **Change Question Type** column.



A. Choices
Choices allows you to select the number of choices you will have.

B. Answers
Answers allows you to choose the type of answers for your question.

C. Position
Position allows you to choose the position of your question.

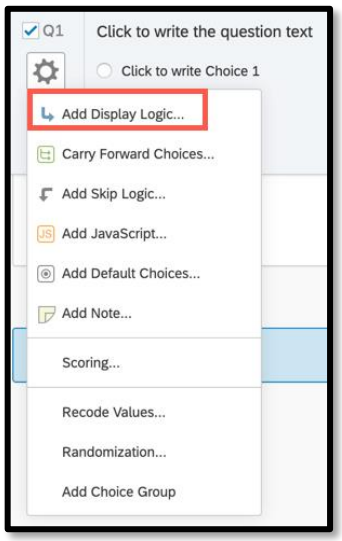
D. Validation Options
With validation, you can request or require respondents to complete unfinished questions in your survey.

E. Validation Type
Validation Type will allow Validation to pass if the conditions are met.

F. Actions
Actions allows for a more precise control on position of questions and look of formatting.

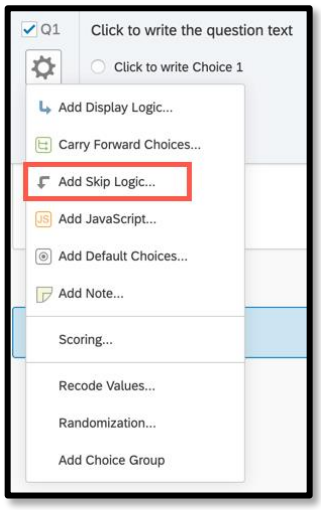
Display Logic

Display Logic is mostly used on a single-question basis. For example, if you ask a yes or no question and you only want people who answer “Yes” to see the next question, then you will use Display Logic.



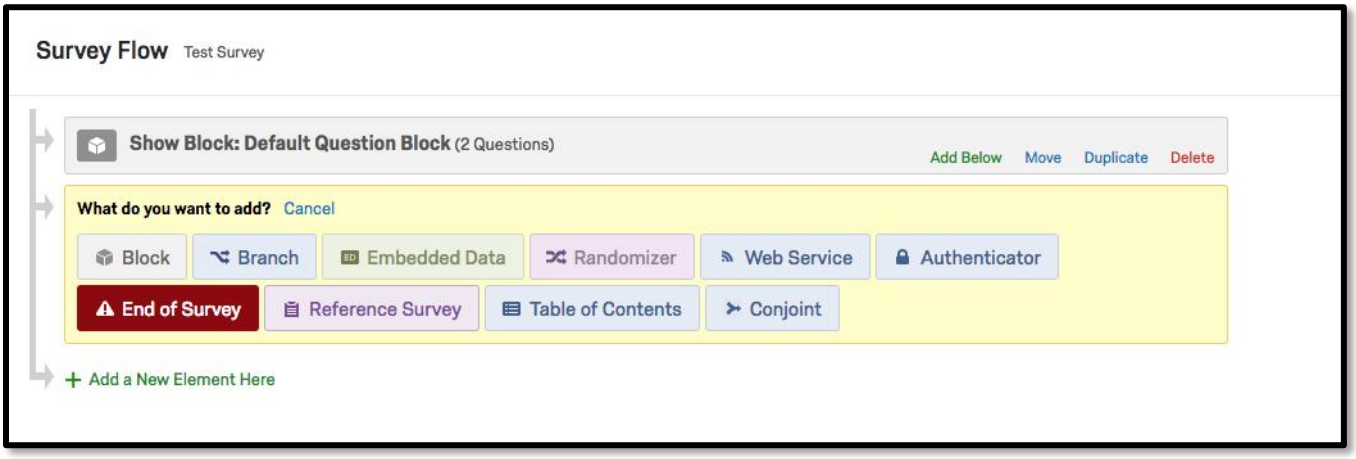
Skip Logic

Skip Logic is used to skip respondents past multiple questions within a single block. A block contains multiple questions. You can have multiple blocks throughout your survey. For example, if you only want respondents to continue through the survey if they answer “Yes” to attending the conference. Every respondent that answered “No,” will be skipped to the end of survey.



Survey Flow

Survey Flow allows you to customize where your survey respondents go in your survey and what the respondents will actually see.



Block - allows you to show a block of questions that will be used with other Survey Flow elements.

Branch - allows you to make things visible in your survey with certain conditions.

Embedded Data - allows you to add any extra information in addition to survey responses like panel data or other variables.

Randomizer - presents question blocks or other elements in a random order in your survey.

Web Service - allows you to pull information from an external source into your survey.

Authenticator - allows you to verify the identity of a respondent before the survey is taken.

End of Survey – allows you to terminate respondents at various locations with custom experiences.

Reference Survey - allows multiple surveys to use the same set of questions.

Table of Contents - allows the ability of respondents to navigate as they wish throughout the survey.

Conjoint - the conjoint wizard can set up a conjoint survey easily and quickly.

Deleting a Question

If you no longer need a question and wish to delete it, it can be deleted. A deleted question will be stored in your trash bin until permanently deleted.

***Warning**: Deleting a question in an active survey will invalidate all of the data associated with that question.*

To delete a question:

1. Click the question.

When the question is selected, it will be a slightly darker color than the other questions. With the question selected click the red minus sign to delete the question.

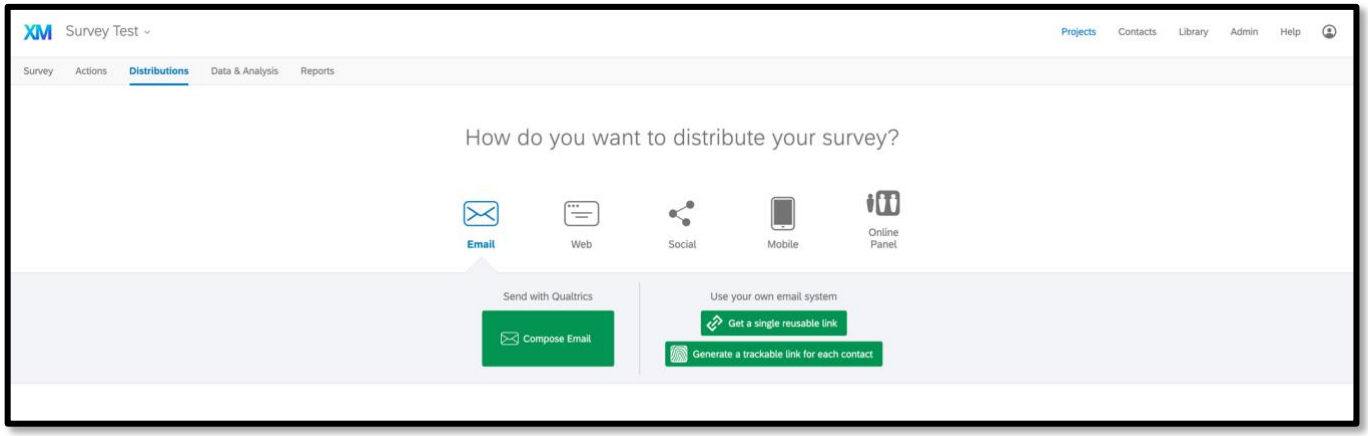
Deleted questions will be stored in your **Trash/Unused Questions** until they are permanently deleted.
To permanently delete stored questions, click on the Empty Trash button on the right-hand side of the bottom of the page.

Distributing a Survey

Once you have built your survey you will need to activate it. Activating the survey will allow you to begin the collection of data from the respondents.

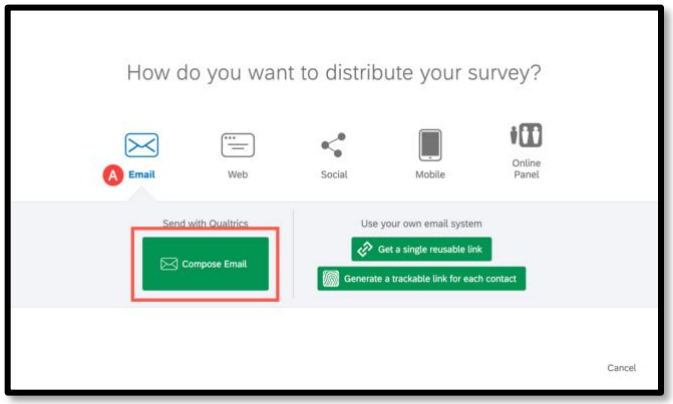
1. Select your Survey

2. Click on the **Distributions** tab. When the distribution tab is selected you will see several methods of distributing a survey. These distribution methods include: email (sent with Qualtrics or using your own email system), embedding your survey link on a website, and distribution on social media. Once the distribution method has been selected the survey is activated.

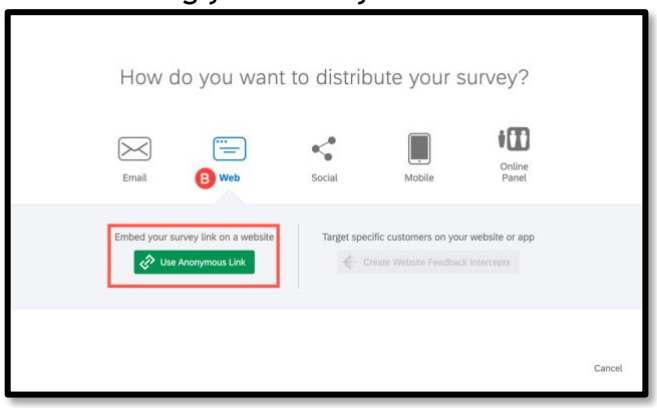


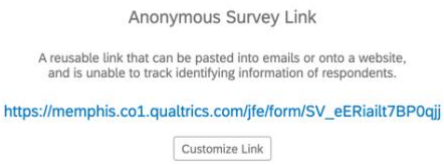
Distribution Methods:

A. Email (sent with Qualtrics or using your own email system)

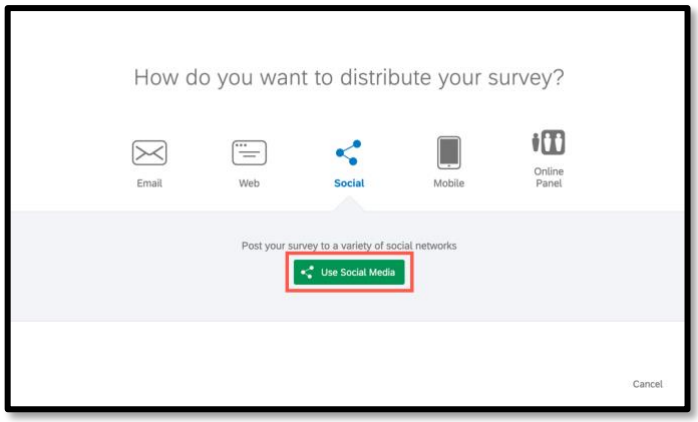


B. Embedding your survey link on a website using an anonymous link.

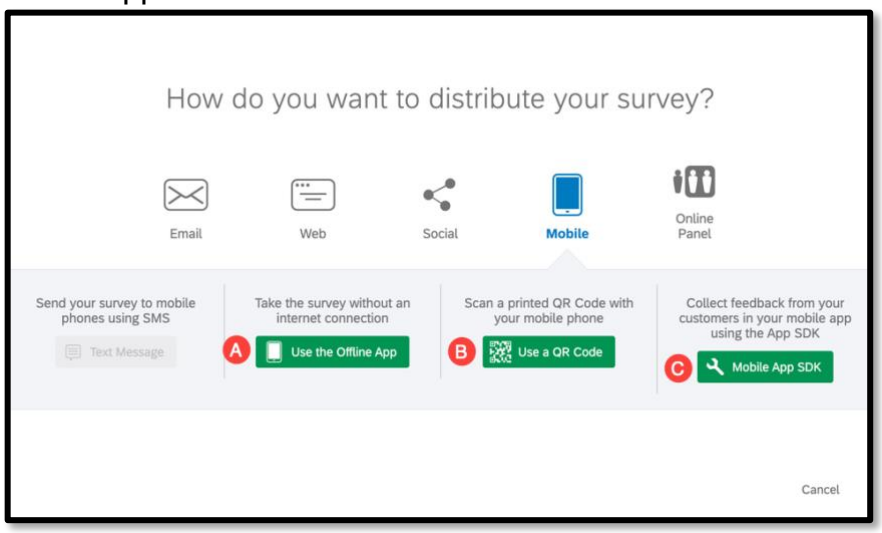




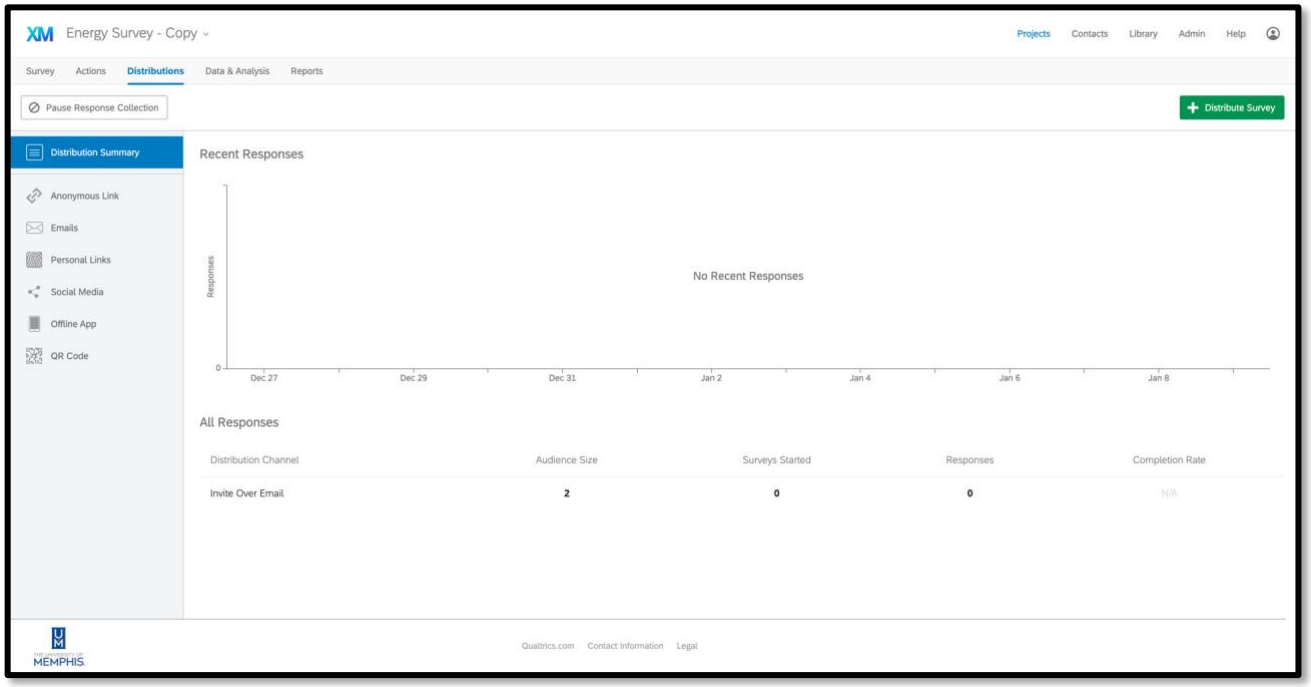
C. Distribution on social media.



D. Using Mobile to create a survey link using the **A)** Offline app, **B)** a QR code, or **C)** Mobile App SDK.



Once the Survey's distribution method is chosen, it will appear like this.

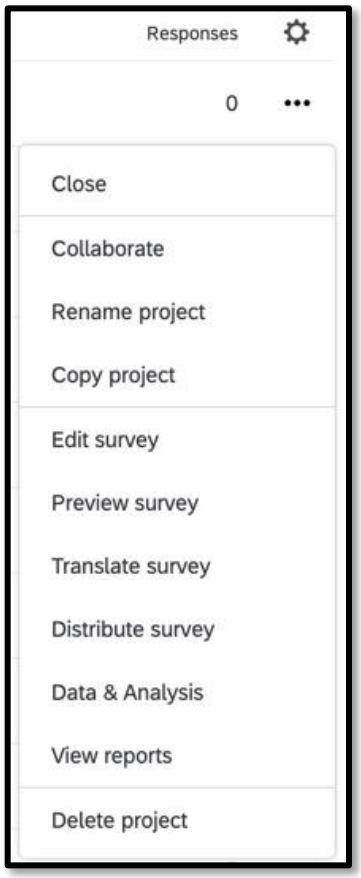


Activating Survey

Once your survey is set up, you will need to activate your survey. To activate, choose the three dots at the end of the survey line to the right.

When the arrow is chosen a drop-down menu will appear with several survey options. **Activate Survey** is the first choice in the drop-down menu. From here you will also have a link in the drop-down menu for quick access to edit, preview, translate, and distribute your survey as well as view reports, data and analysis. Links are also available for you to rename, copy, share, or delete the project. Once the survey has been activated, the survey status will change from CLOSE to ACTIVE.

This is a close up of the pop-up menu:



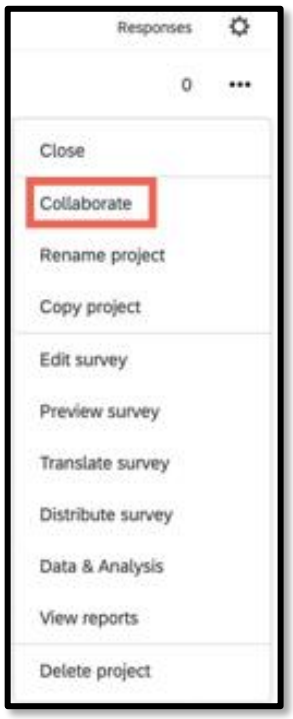
Sharing your Project

Sometimes you want to share your project with someone, but not offer them full functionality and options. In these instances, use the sharing feature.

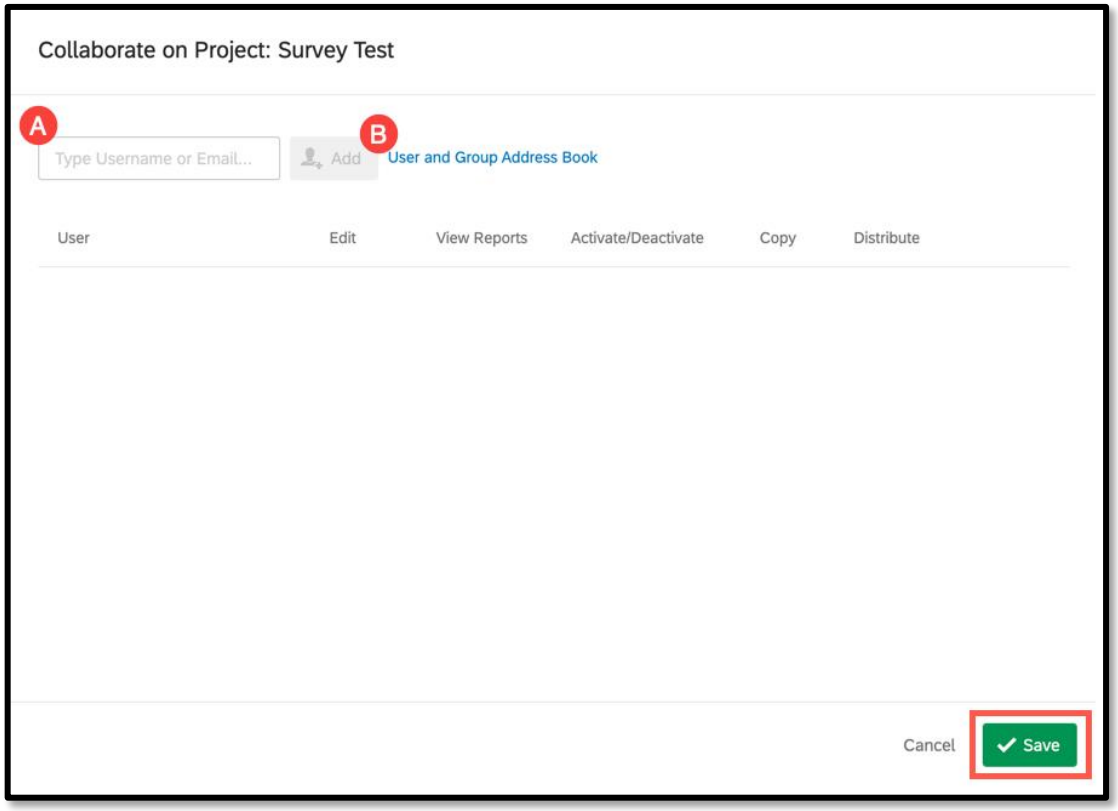
Sharing & Collaborating with others Inside the UofM Community

On the My Projects page, click the three dots then from the drop-down menu to the right of the project you want to share to access the project actions.

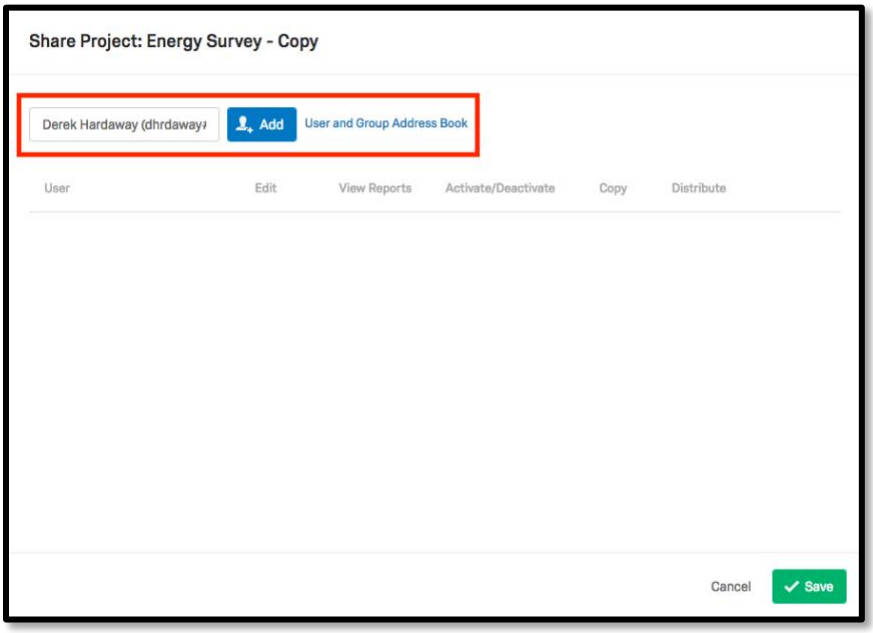
Choose **Collaborate**.



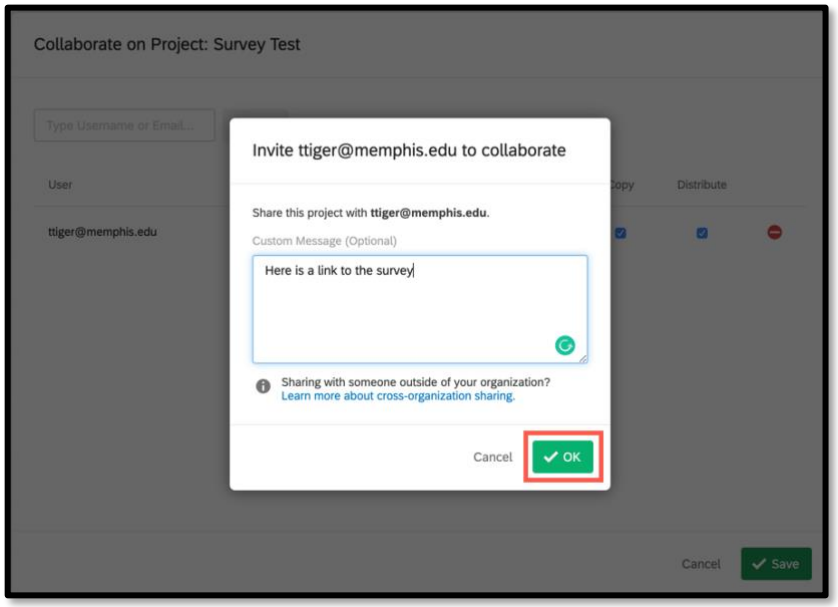
From here you can add users individually A), add them from the User and Group Address Book from the UofM, or from a contact list you have saved B), C) Next, click Save



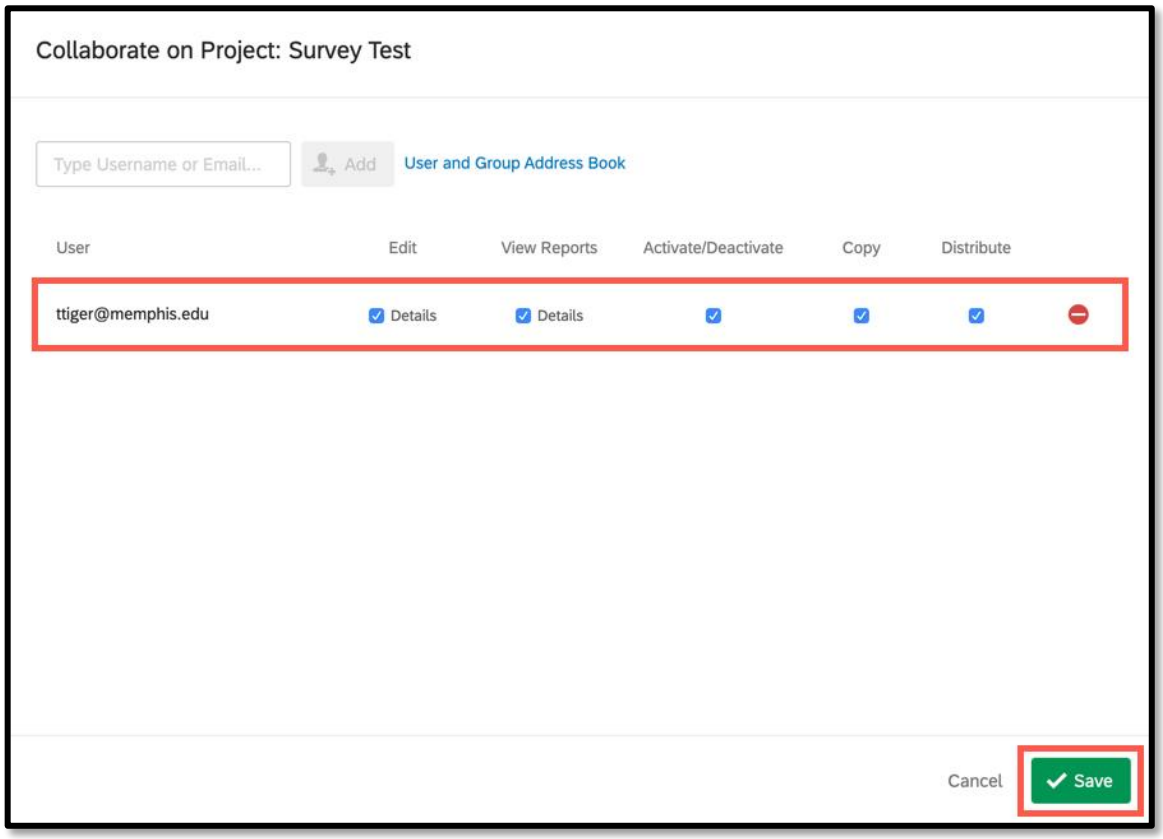
Once you have added the person you would like to share and collaborate with, click **Add.**



When you click **Add**, the option to send the user a message via email will immediately pop up. Here you can send the user a message telling them that you have shared a project with them. Type your message in the provided field then click **OK**.



Once the message is sent you will be presented with the options for permission levels you want to grant to the user. Here you can check the boxes to edit specific permissions for the user you are collaborating with.



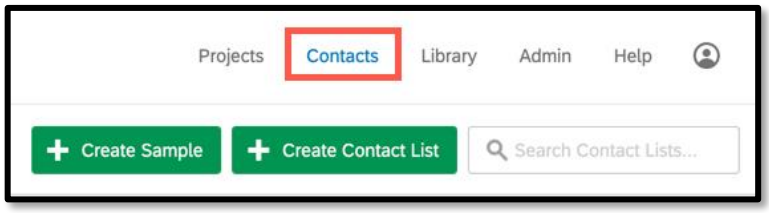
The choices in sharing/collaboration include: edit, view reports, activate/deactivate, copy, and distribute.

Edit Details and **View Reports Details** contain many more survey permissions that are available for you to select.

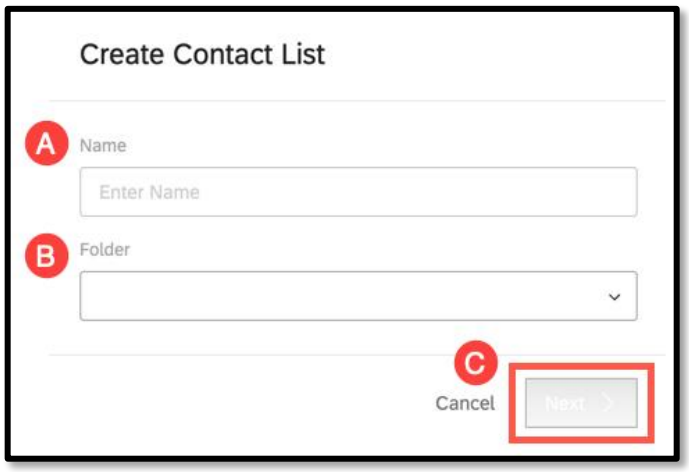
Once you have selected the choices, click **Save**.

Creating a Custom Contact List

From the **Projects** page go to the contacts menu listing located at the upper right-hand corner of the page.



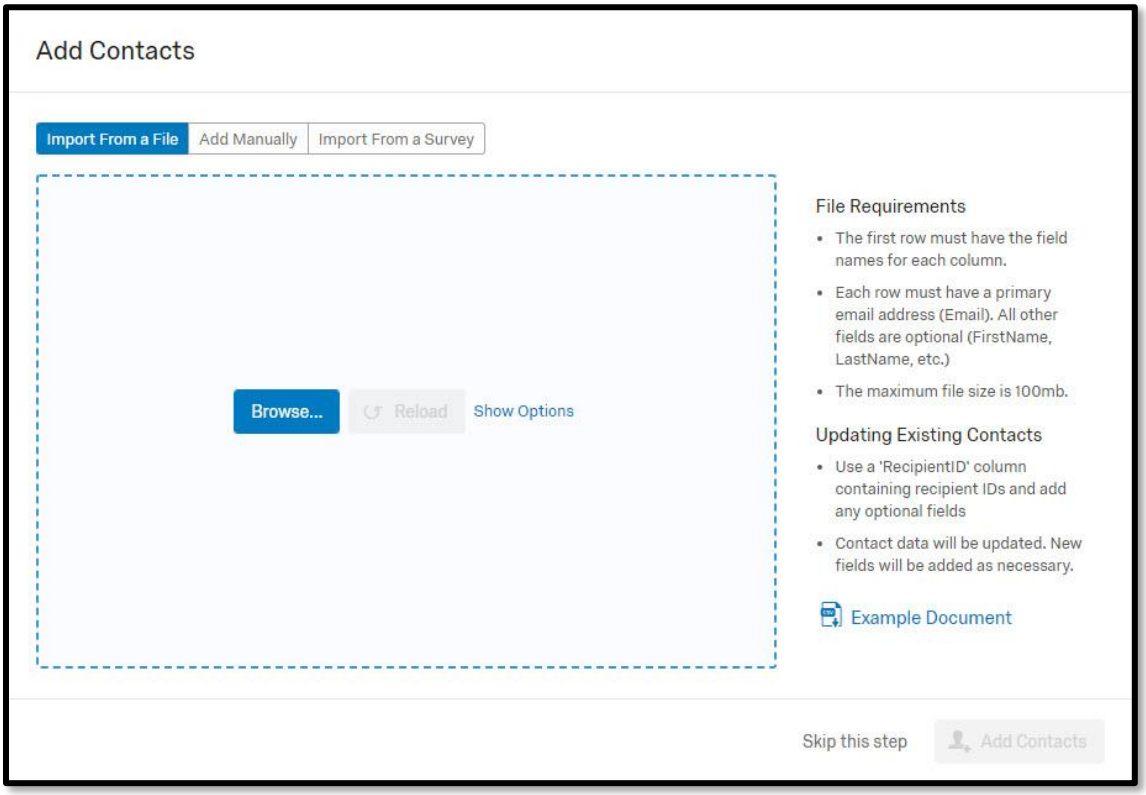
Next click **Create Contact List**. From here you will choose.



Once you have A) named and B) designated where the contacts will be saved, C) click **Next**.

Adding Contacts

You can add contacts from an imported csv file, add them manually, or import them from another survey.



Importing Contacts from a File

File Requirements:

The first row must have the field names for each column.

Each row must have a primary email address (Email). All other fields are optional (FirstName, Last Name, etc.) The maximum file size is 100mb.

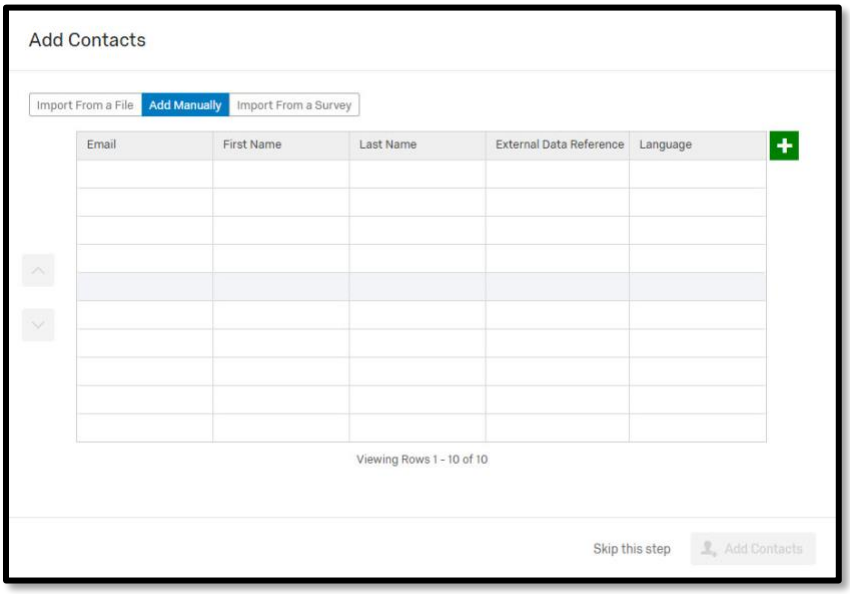
Updating Existing Contacts:

Use a 'RecipientID' column containing recipient IDs and add any optional fields

Contact data will be updated. New fields will be added as necessary. You can download a provided sample Excel template for contacts by clicking on the Example Document.

Adding Contacts Manually:

1. Navigate to the **Import Contacts** window by following the same steps for Creating a New Contact List. Select **Add Manually**. Enter the email, first name, last name. External Data Reference and Language are optional. You may also choose to add and additional field by selecting the green + sign located at the top right-hand corner of contact list.



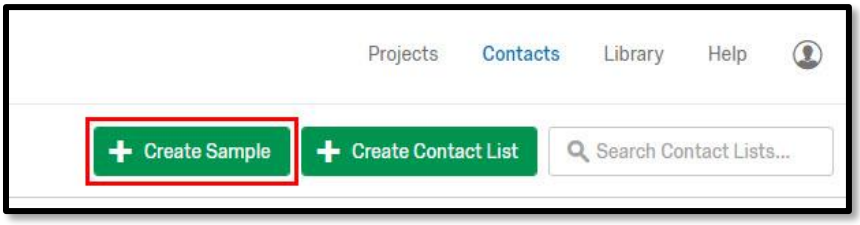
2. Once you have entered the contacts click **Add Contacts**.

Creating a Contact List Sample

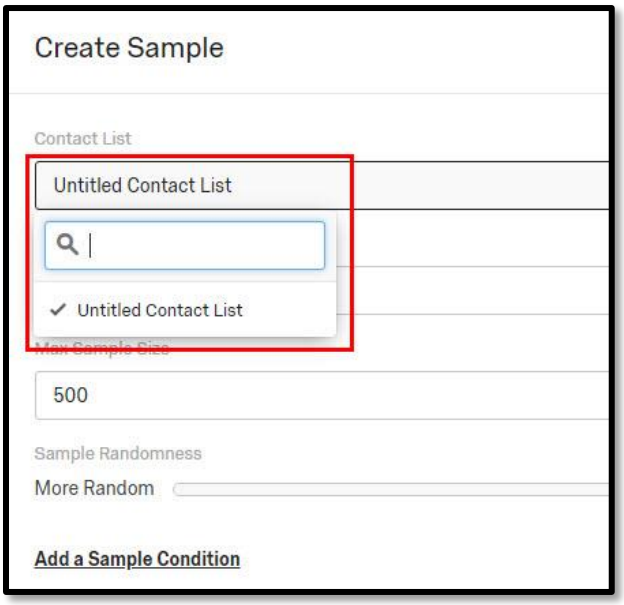
A **Contact List Sample** is a subgroup of participants from your contact list to which you can send surveys. You can sample randomly or you can select participants that meet certain conditions.

Using a **Contact List Sample** allows you to target specific segments of your audience at a time, allowing you to run pilot distributions, space your data collection over time, and reach out to individuals who haven't responded to a survey invitation and more.

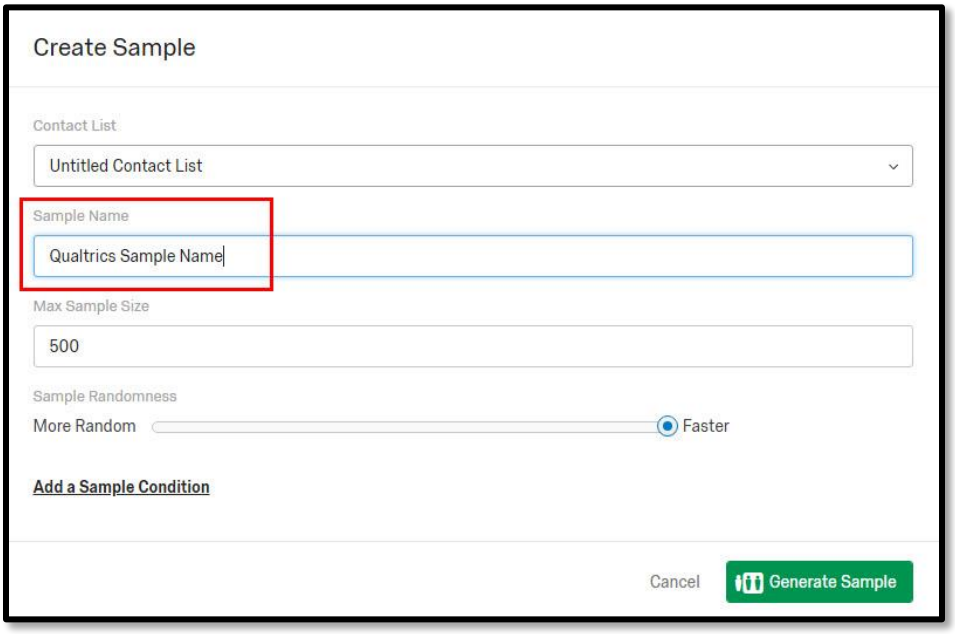
1. Navigate to **Contacts** section of the survey and click **Create Sample**.



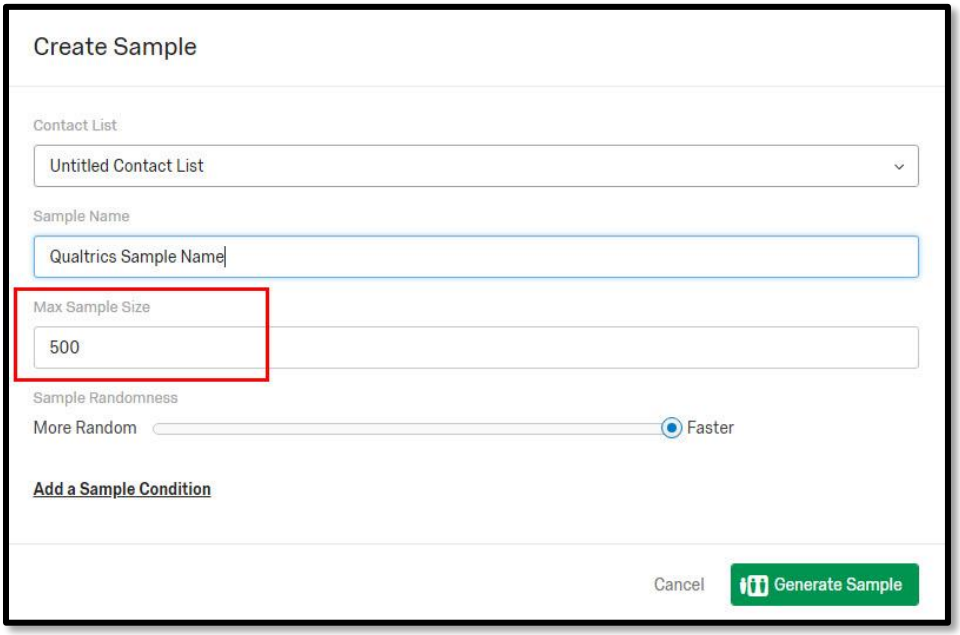
2. Select the contact list you want to pull your sample from.



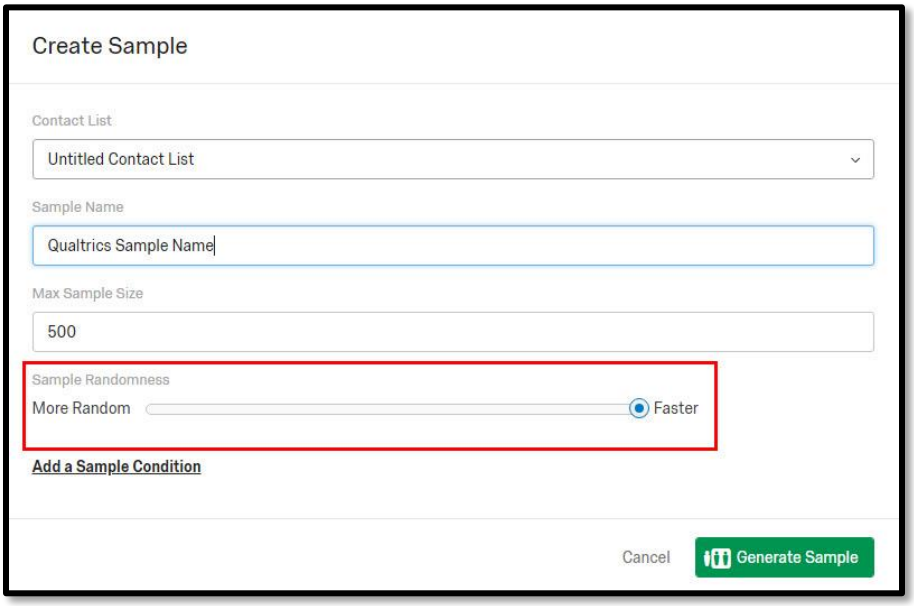
3. Name your sample by typing the name in the space provided under the words **Sample Name**.



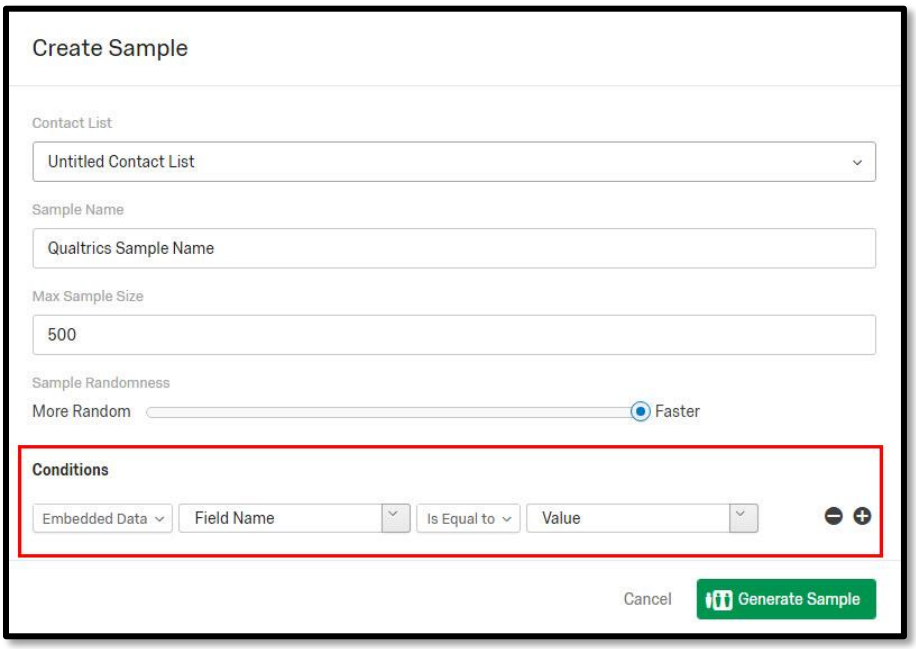
4. Enter your limit of how large your sample can be by selecting the **Max Sample Size**.



5. Use the **Sample Randomness** slider to control how fast and random the sample is calculated.



6. You can also choose to add a **Sample Condition**, which will set conditions for which the contacts are eligible to be in the sample (to add multiple conditions, click the gray plus sign to the right of the condition).



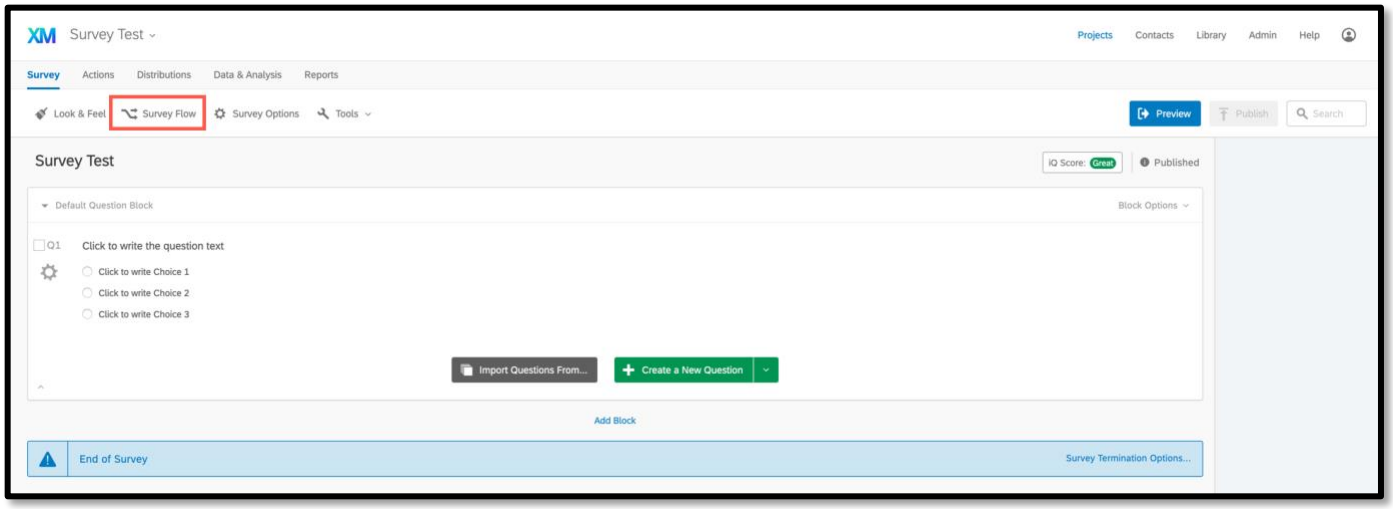
7. Click the green **Generate Sample** button to generate a sample.

Creating a Contact List Sample

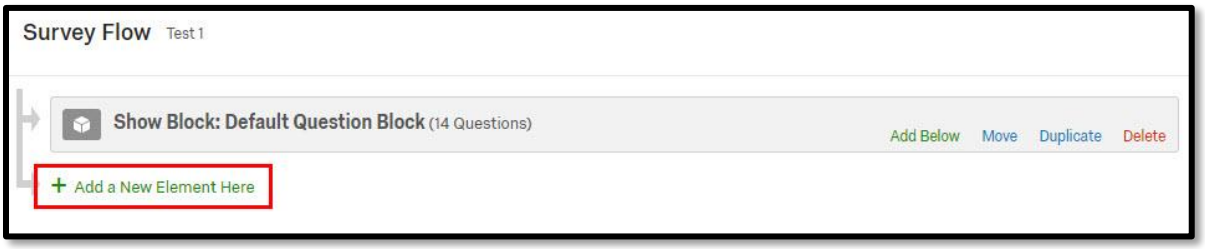
To create a survey, which uses your UofM Authentication credentials, first select the survey you would like to authenticate using the UofM credentials.

Select the survey you would like to authenticate.

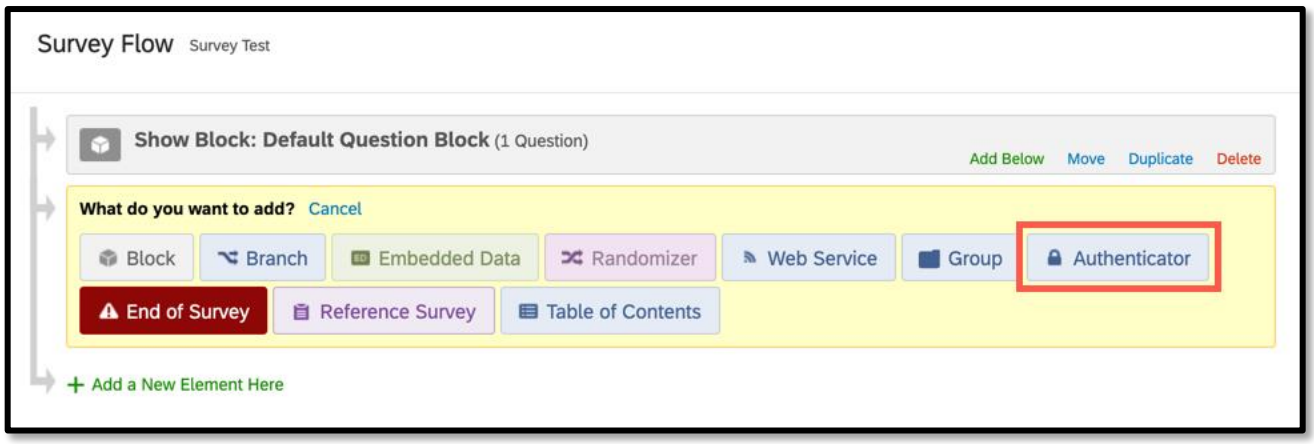
1. Select Survey Flow once you have selected the survey to edit.



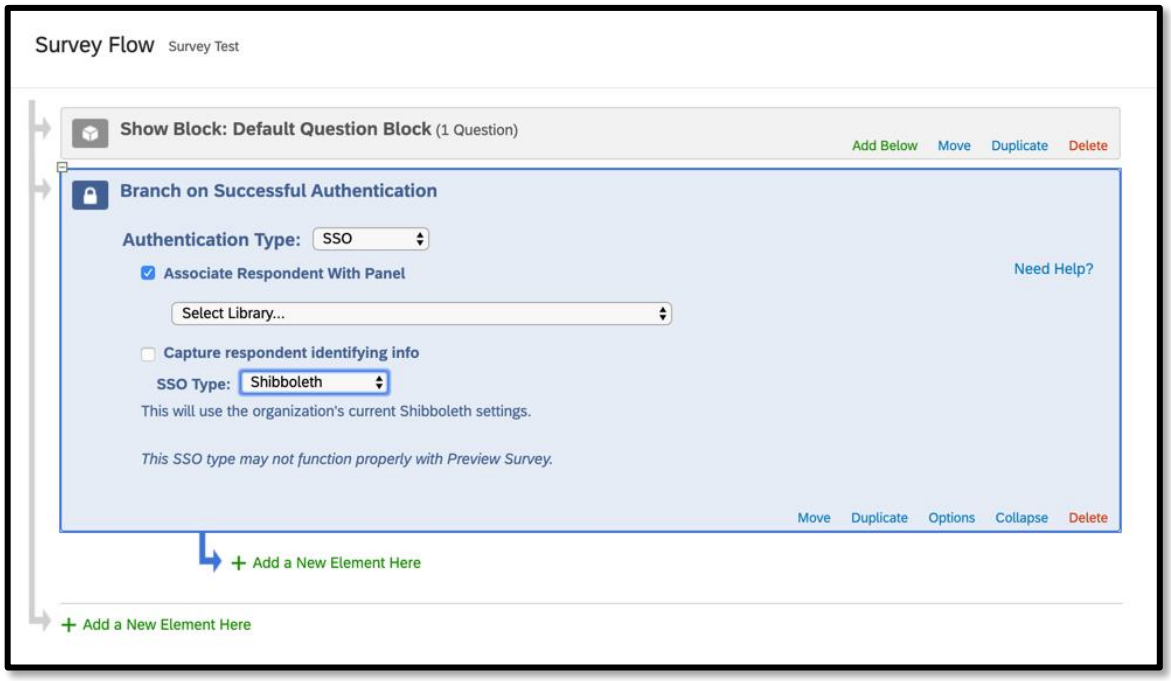
2. Next select Add a New Element here.



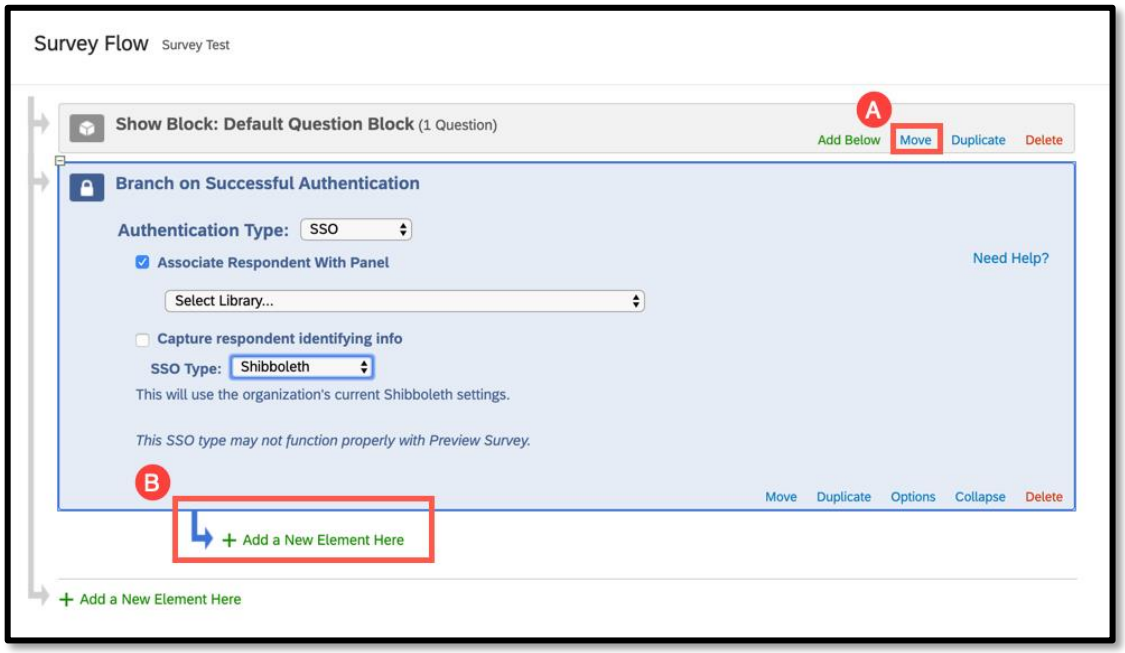
3. Next, you will select **Authenticator** from underneath the question. What do you want to add? Choose Authenticator from the list of selections.



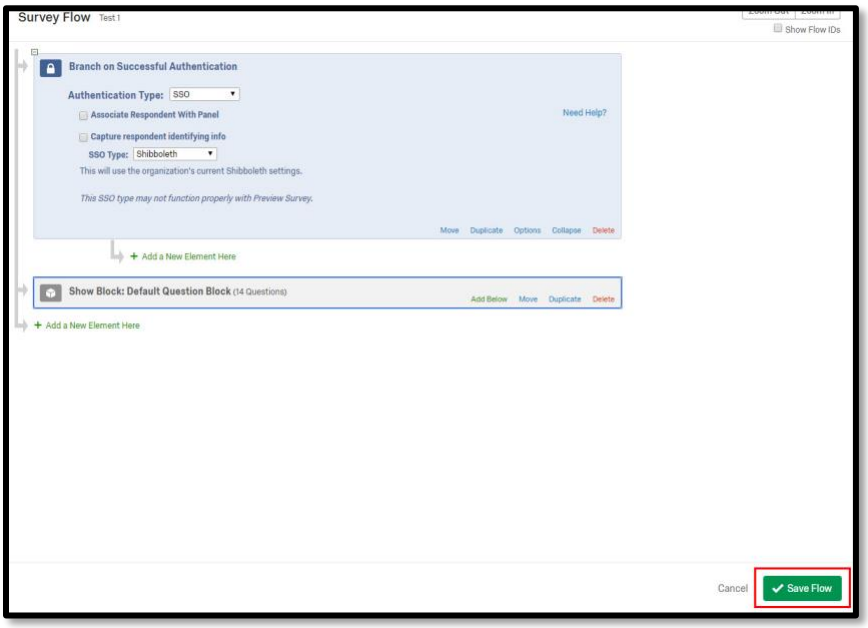
4. With the **Authenticator Menu** selected make sure you choose **SSO** from **Authentication Type**, **Associate Respondent With Panel** is not selected, **Capture Respondent Identifying Info** is not selected and that **SSO Type** has **Shibboleth** as a choice selected from the drop-down menu.



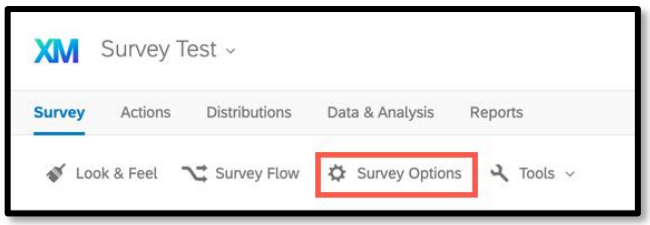
5. Next, you will need to move your block of questions below the branch authentication. (A) Clicking on **Move** will change colors to a bright green. (B) Drag the block of questions below and get right next to the indented arrow so that the block of questions falls underneath branch and by the arrow.



When your questions block has been moved to the correct place, it will look like this. Click **Save Flow**.



6. Next, you will need to make sure the survey options have been configured correctly.



Under Survey Protection make sure open access is selected and that password protection is not selected. Click Save when you have finished.

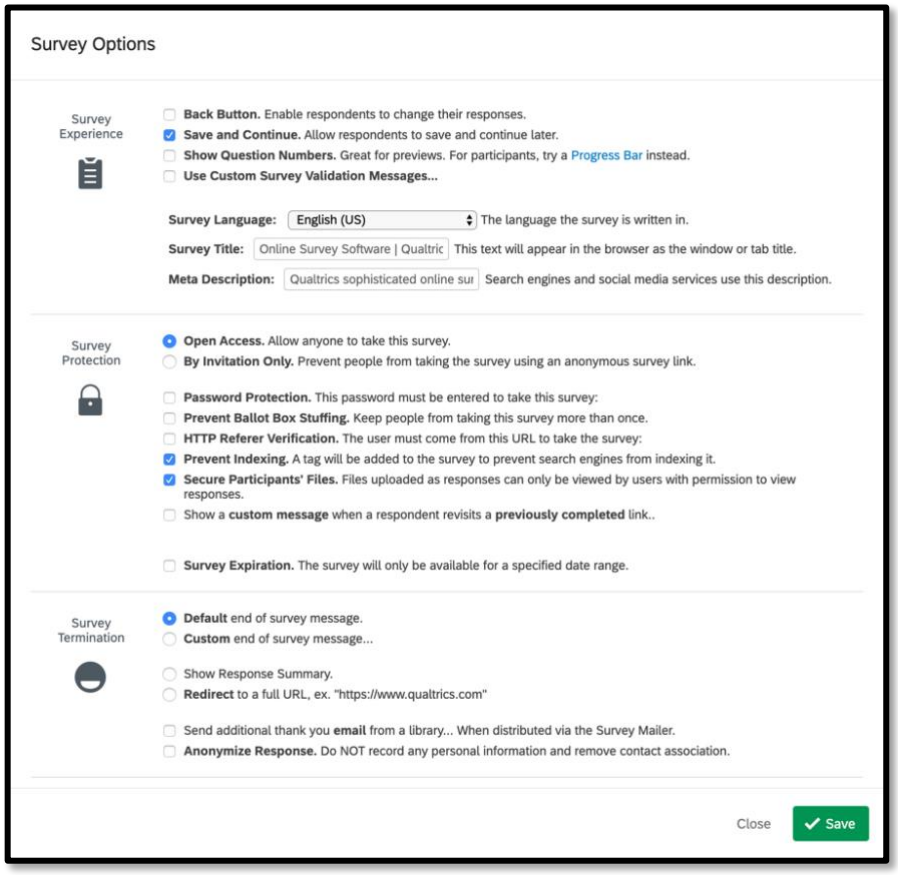
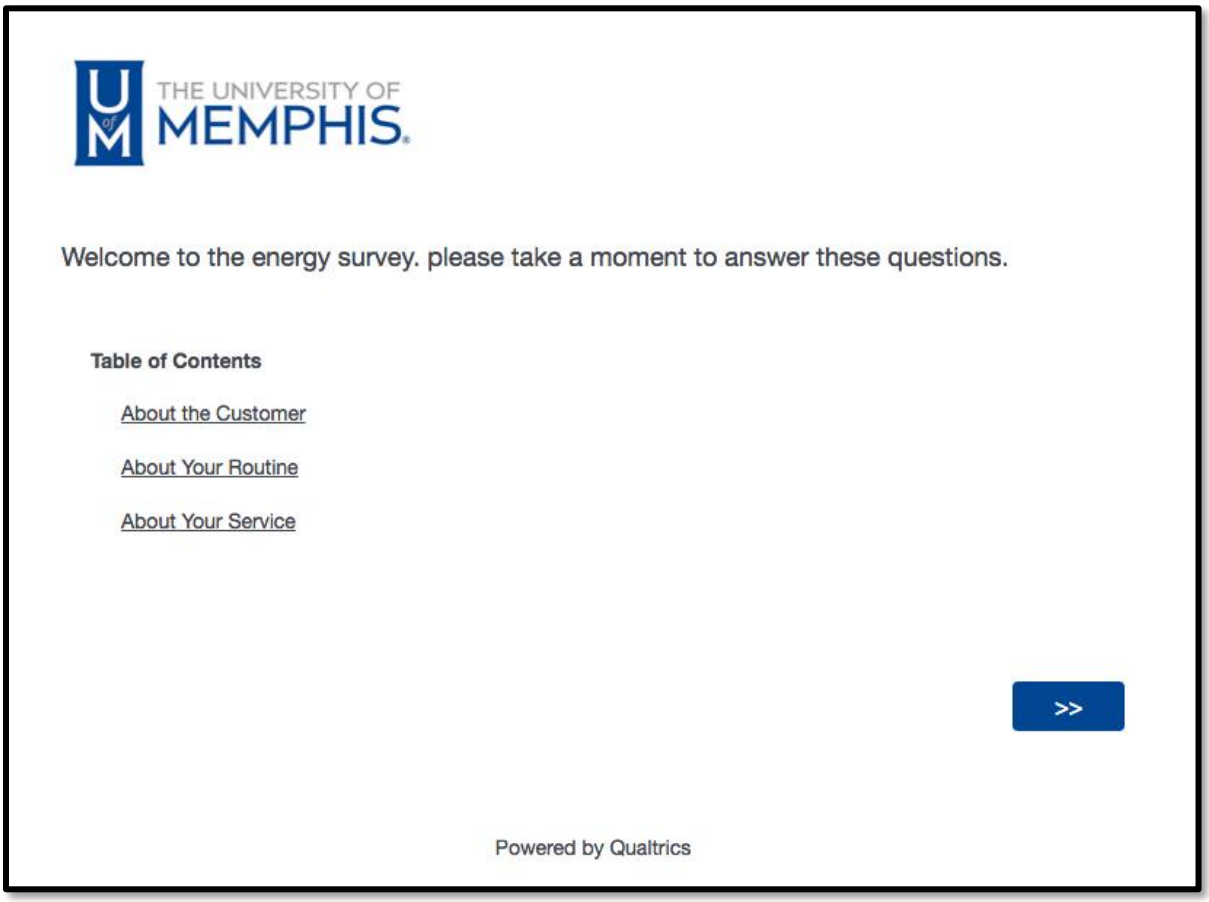


Table of Contents

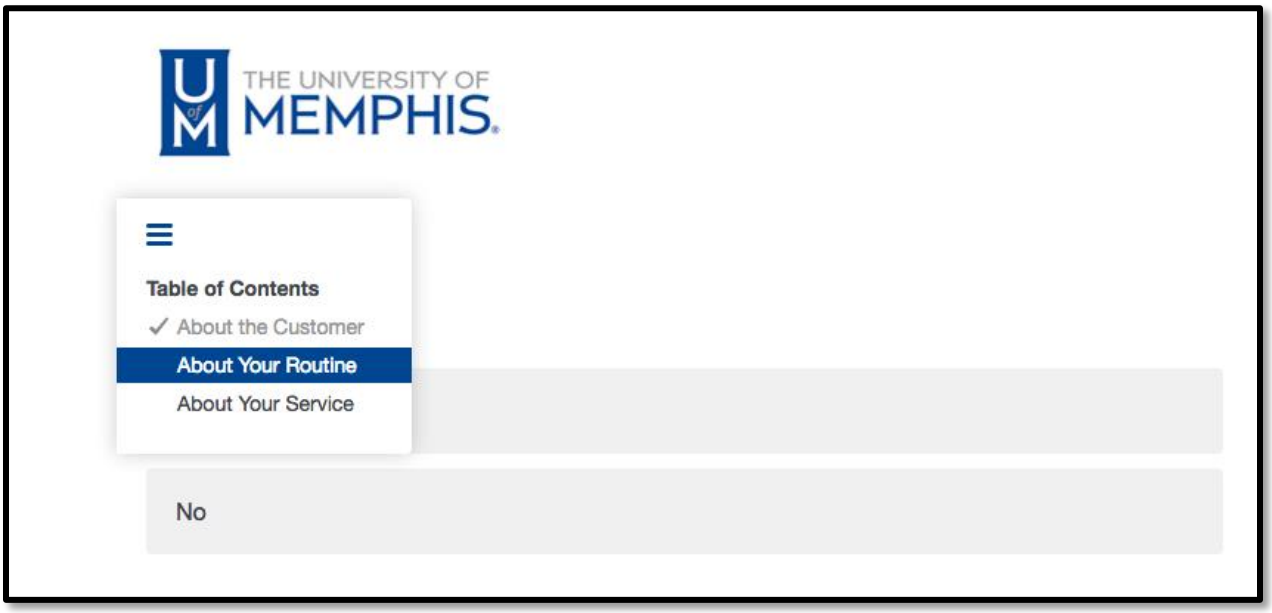
Use the Table of Contents (ToC) feature to allow your respondents to navigate between question blocks while taking a survey. Each survey respondent will have access to a Table of Contents that allows them to jump to different sections in your survey and track their overall progress.

Table of contents is a **Survey Flow** element similar to **Branch Logic** or **Randomizers**. When a respondent reaches a Table of Contents (ToC), they see a list of all the blocks included within the ToC and can choose to start in any block.



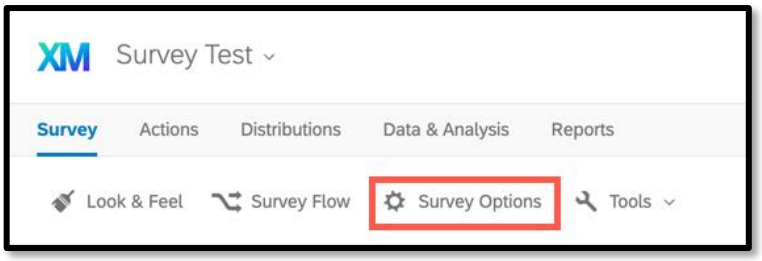
The respondent can then click on a block to move to that section of the survey.

At any point, the respondent can click on a sidebar to see a list of all blocks in the ToC. Any completed blocks will have a checkmark, helping the respondent keep track of their progress.

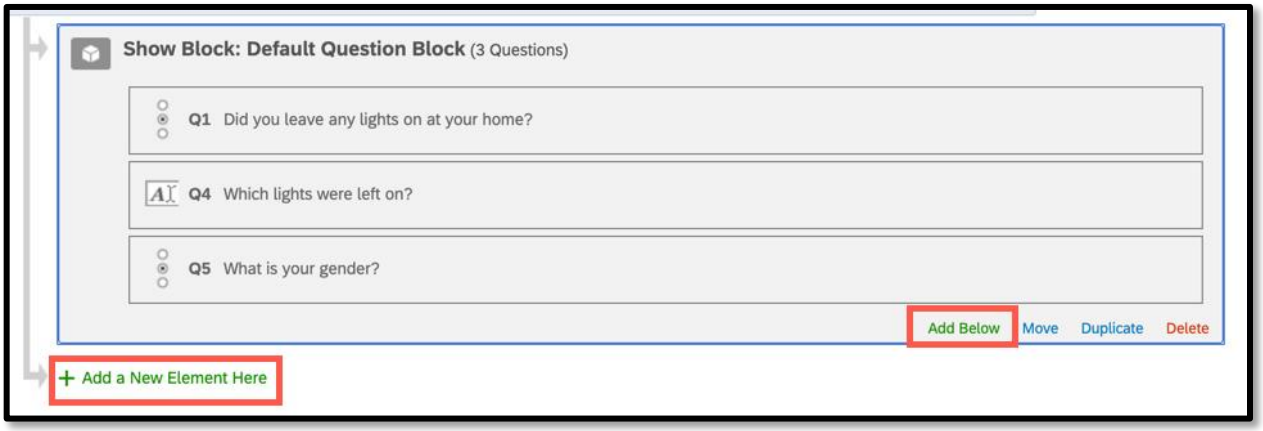


How to Create a Table of Contents

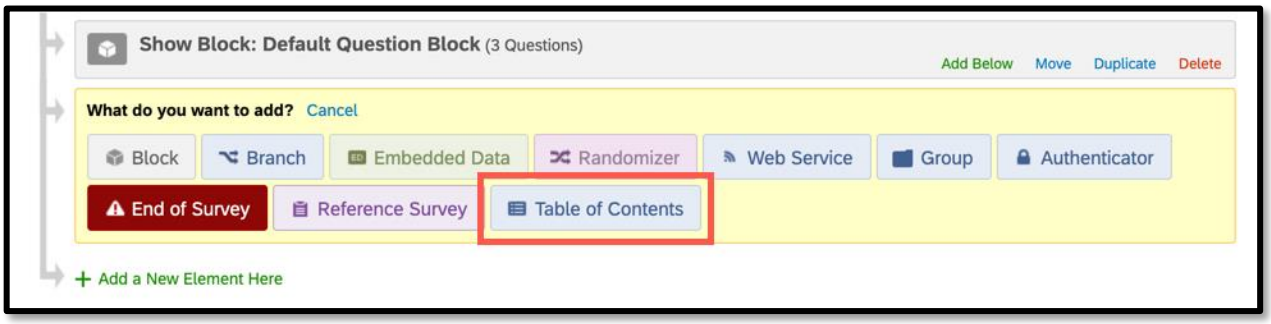
1. With your survey open, next open **Survey Flow** in the survey module.



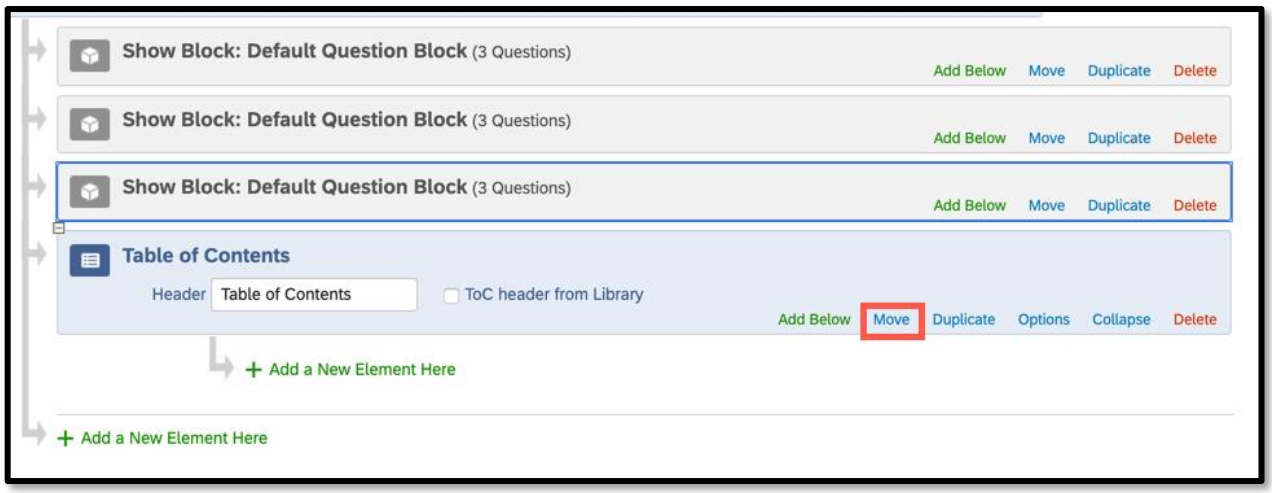
2. Click **Add a New Element Here** or **Add Below**.



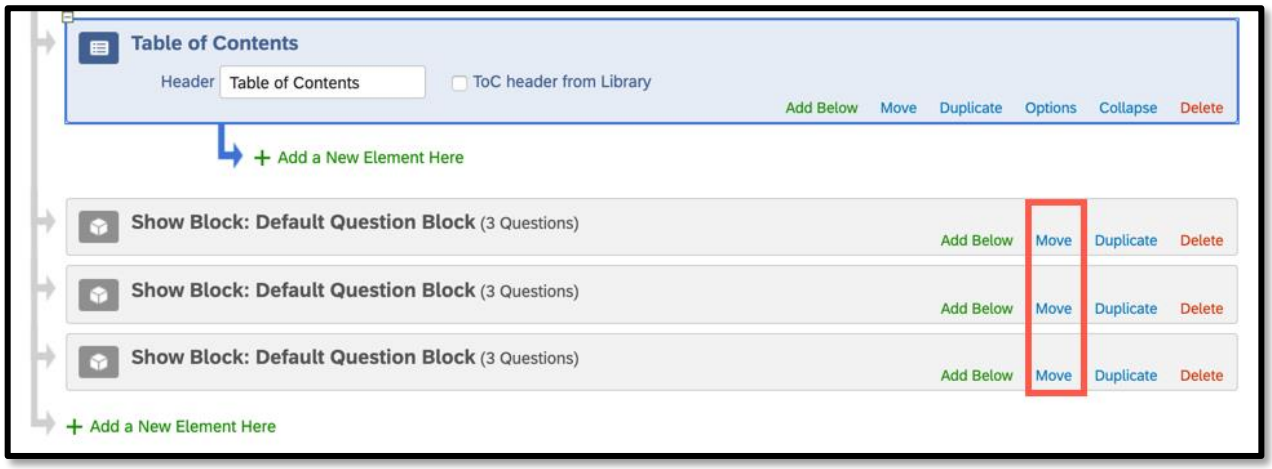
3. Select **Table of Contents**.



4. Move the **Table of Contents** element to the correct location by clicking move and dragging the element.



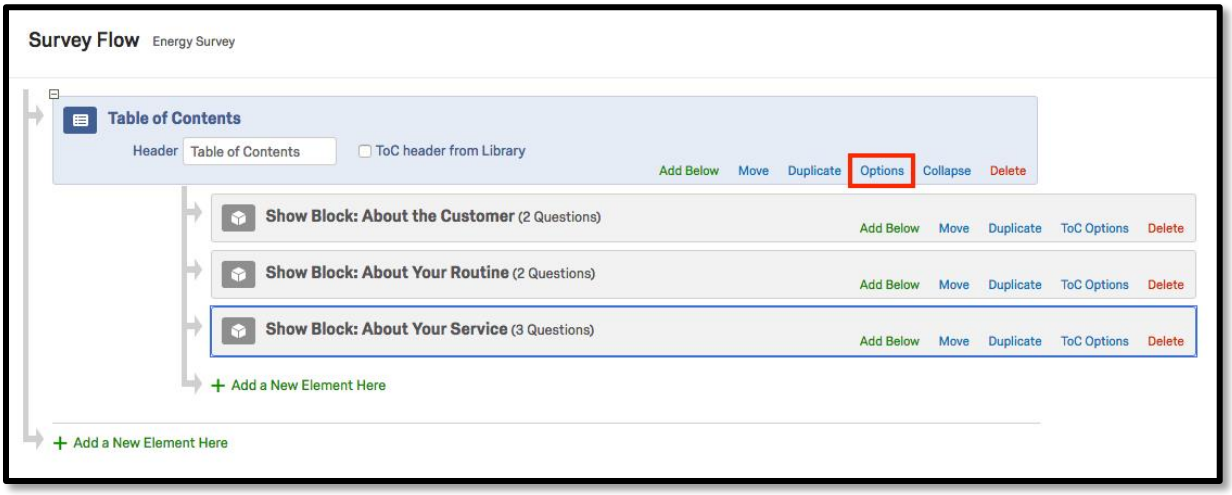
5. Click Move to move the question block and other elements so that they are nested beneath the Table of Contents element.



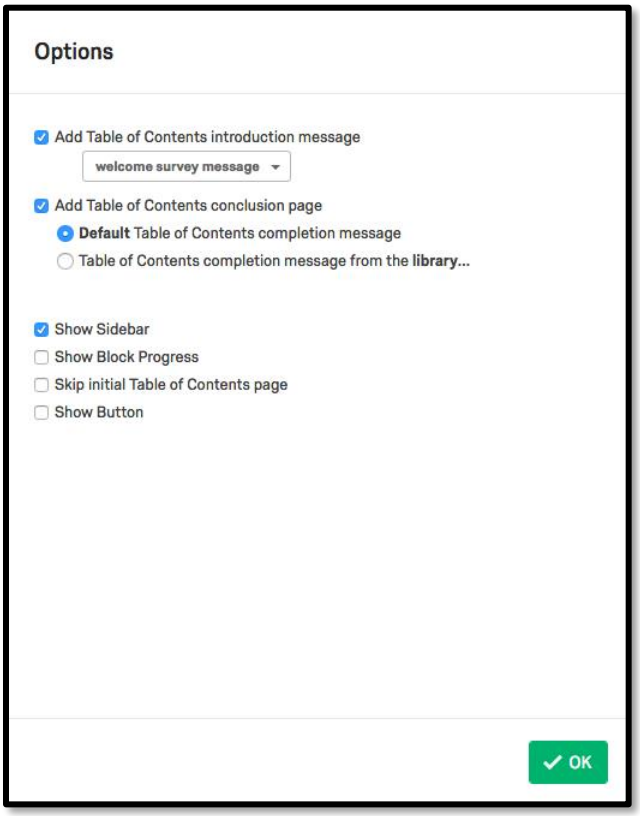
6. Click **Save Flow**, located at the bottom right hand corner of the page.

Table of Contents Options

There are several available options for table of content navigation. To see the available options, select Options.



From here you can select the various options available. When your selections are made click **OK**.



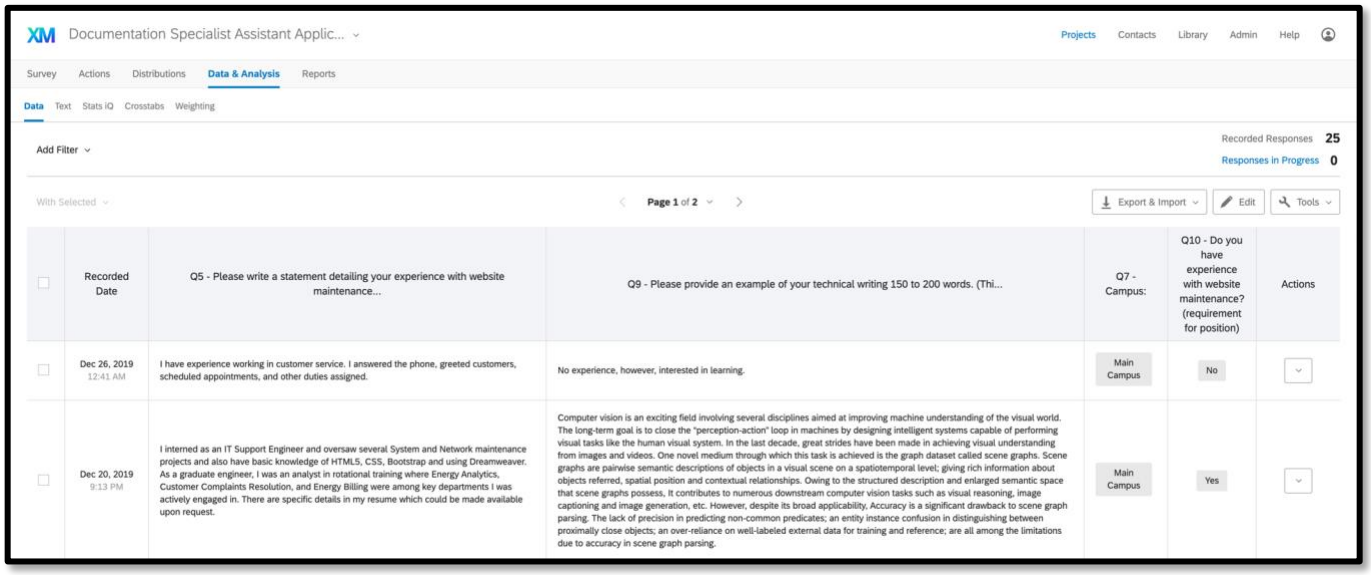
Collecting Survey Results

The survey has a quick view of results located to the right of the survey which provides information about the survey. It tells you the status of your survey, the number of responses. How many of those responses are complete, how many of them are only partially completed, as well as an overall completion rate.

Status	Creation date ↑	Responses
● Active	Jan 10, 2020	340

Data and Analysis

The Data & Analysis module allows you to manage, add information to, and analyze individual participant responses. The module is organized into three tabs: Data, Text, and Cross Tabs.



XM Documentation Specialist Assistant Applic...

Projects Contacts Library Admin Help

Survey Actions Distributions Data & Analysis Reports

Data Text Stats iQ Crosstabs Weighting

Add Filter

Recorded Responses 25
Responses in Progress 0

With Selected

Page 1 of 2

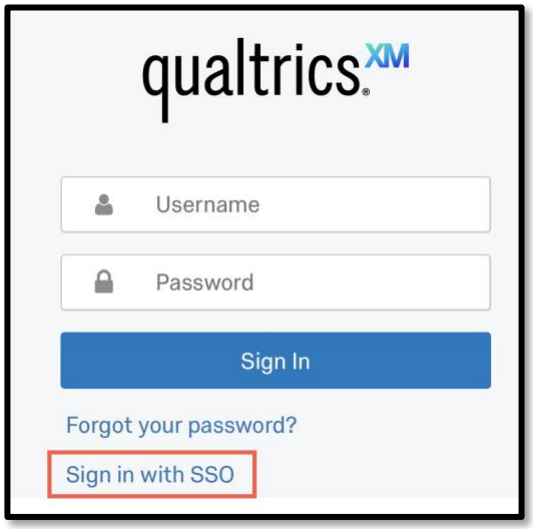
Export & Import Edit Tools

	Recorded Date	Q5 - Please write a statement detailing your experience with website maintenance...	Q9 - Please provide an example of your technical writing 150 to 200 words. (Thi...	Q7 - Campus:	Q10 - Do you have experience with website maintenance? (requirement for position)	Actions
	Dec 26, 2019 12:41 AM	I have experience working in customer service. I answered the phone, greeted customers, scheduled appointments, and other duties assigned.	No experience, however, interested in learning.	Main Campus	No	
	Dec 20, 2019 9:13 PM	I interned as an IT Support Engineer and oversaw several System and Network maintenance projects and also have basic knowledge of HTML5, CSS, Bootstrap and using Dreamweaver. As a graduate engineer, I was an analyst in rotational training where Energy Analytics, Customer Complaints Resolution, and Energy Billing were among key departments I was actively engaged in. There are specific details in my resume which could be made available upon request.	Computer vision is an exciting field involving several disciplines aimed at improving machine understanding of the visual world. The long-term goal is to close the "perception-action" loop in machines by designing intelligent systems capable of performing visual tasks like the human visual system. In the last decade, great strides have been made in achieving visual understanding from images and videos. One novel medium through which this task is achieved is the graph dataset called scene graphs. Scene graphs are pairwise semantic descriptions of objects in a visual scene on a spatiotemporal level; giving rich information about objects referred, spatial position and contextual relationships. Owing to the structured description and enlarged semantic space that scene graphs possess, It contributes to numerous downstream computer vision tasks such as visual reasoning, image captioning and image generation, etc. However, despite its broad applicability, Accuracy is a significant drawback to scene graph parsing. The lack of precision in predicting non-common predicates; an entity instance confusion in distinguishing between proximally close objects; an over-reliance on well-labeled external data for training and reference; are all among the limitations due to accuracy in scene graph parsing.	Main Campus	Yes	

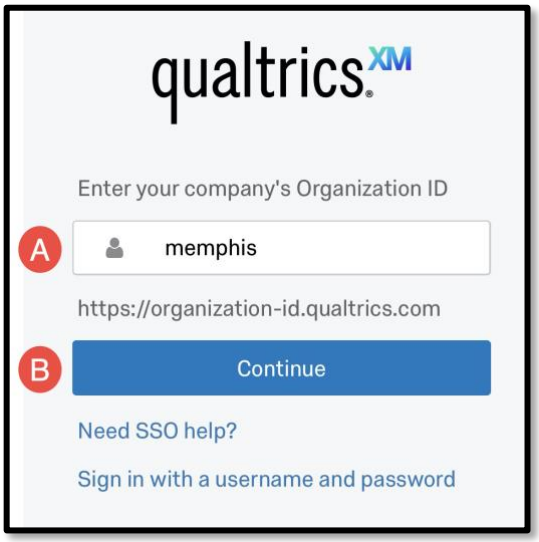
Downloading the Qualtrics Offline Surveys App

1. Go to the iTunes App Store if you have an iPad or iPhone, or go to the Google Play Store if you have an Android device.

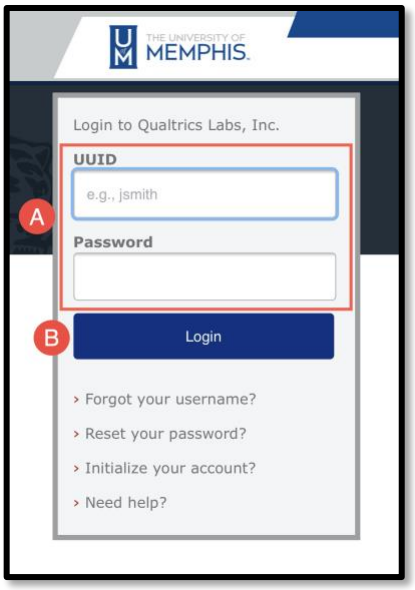
2. Search for "Qualtrics" and download the Qualtrics Offline Surveys app. Note: You can also download the Qualtrics Offline Surveys app to your device using these links: iPad, iPod, & iPhone or Android Tablets & Phones.



3. Enter your credentials. Select **Sign in with SSO**.
4. **A)** In Company's Organization ID enter Memphis, **B)** Click continue.

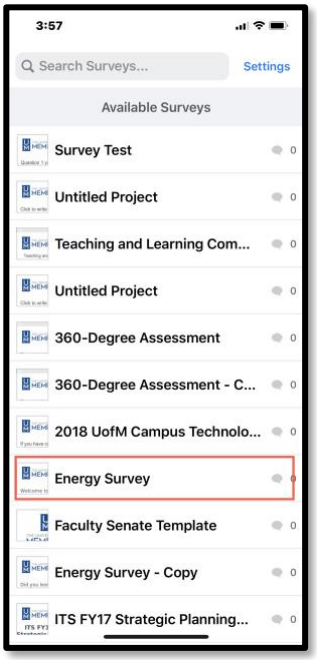


5. **A)** Enter your UofM credentials - UUID and PW. Authenticate with DUO Then
   B) Click Login.

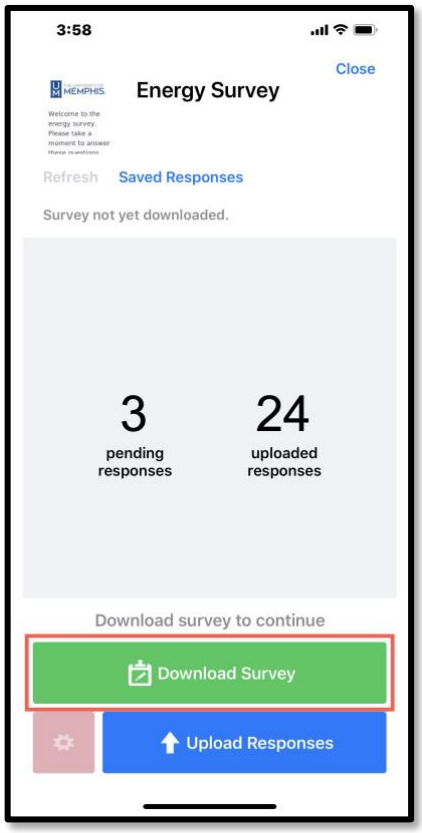


Downloading Surveys

1. In the Offline Surveys app, choose on the survey you wish to download *(**Note:** you can search for specific surveys by using the search box at the top of the screen).*

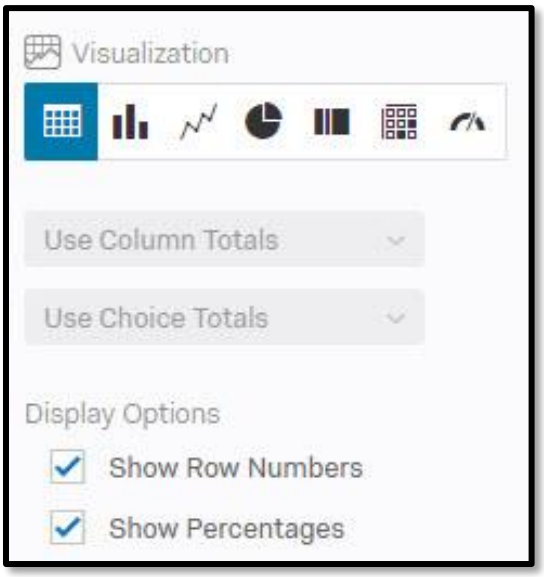


2. Tap **Download Survey**.

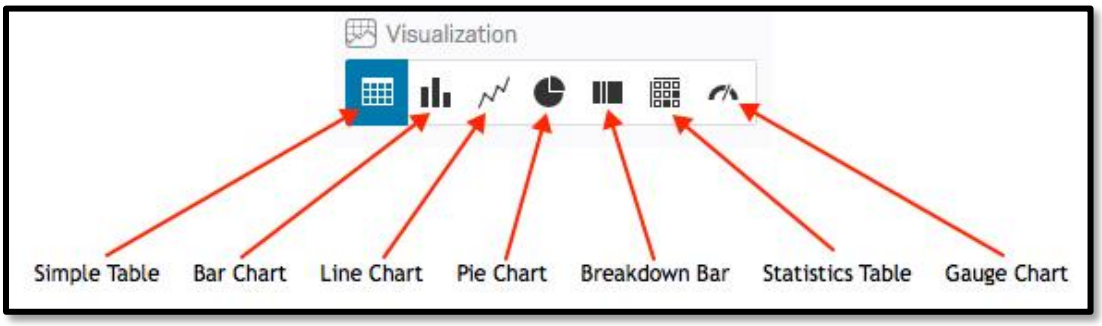


Reports

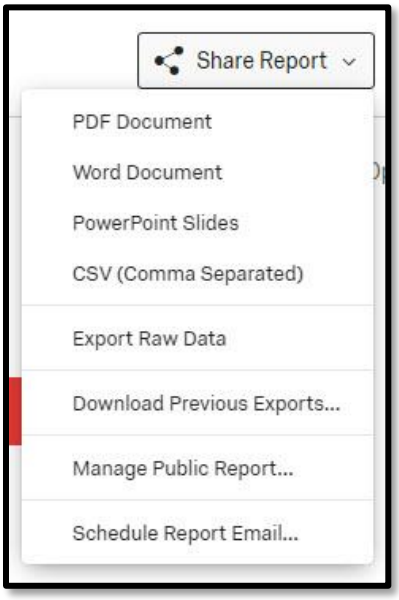
Reports are available to you once your survey has been completed. There are several different modes of visualization that your reports can be displayed in. Visualization options are located to the lower right-hand side of the page.



The choices for visualization include: Simple Table, Bar Chart, Line Chart, Pie Chart, Breakdown Bar, Statistics Table and Gauge Chart.



Reports can also be exported as a PDF Document, Word Document, or CSV (comma separated value) from **Share Report**.



Locating Help Resources

umTech offers support to faculty, staff, and students. Upon completing the training covered in this course, faculty, staff, and students can receive additional training help and resources. Such help can be located as follows:

Service Desk Request

Submitting a Ticket

- Login URL:
  - Here is a link to our service desk ticketing system
  - After logging in, choose the link **Request Help or Services**.
  - Choose Request Help or Services.

Call the ITS Service Desk (901.678.8888) any day of the week! (Excluding Some Holidays)

- The ITS Service Desk hours will be as follows:
  - Monday – Friday 8:00 am – 8:00 pm
  - Saturday 10:00 am – 2:00 pm
  - Sunday 1:00 pm – 5:00 pm
- You can contact the Service Desk for assistance with technical login problems or issues. Incoming calls after hours will be handled by voicemail services. If you require assistance after 8:00 p.m., please leave a message or submit a service request.

- Messages will be checked regularly and receive priority response the following business day. You may also email umTech, umtech@memphis.edu (using this email will automatically generate a help desk ticket).

Important Links

- **Explore the umTech Website**
- **Search Our Solutions Page**