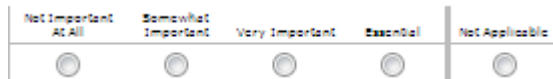


FORMATTING QUESTIONS

Qualtrics is formatted using “cascading style sheets” (CSS) and to some extent, JavaScript. Where you click to write the question text, you see the Normal View. If you select HTML View on the far right, you may paste in CSS, which applies to a number of tips.

How do I get a solid divider line before "Not applicable"?

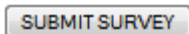


In HTML view, paste this code for Five Points + bar + N/A:
`<style type="text/css"> .c9 {border-left:solid #bbbbbb;}</style>`
 For Four Points + bar + N/A:
`<style type="text/css"> .c8 {border-left:solid #bbbbbb;}</style>`
 Note the bar will show up on any question with enough columns in that question block, so you may have to move questions to new pages.

How do I make the last page's "Next" button say "FINISH"?

You need to edit the question's javascript, which you can get to with the purple settings icon under the variable name. Add this to the javascript:

```
var newName = ' FINISH ';
if ($('#NextButton').nodeName == 'INPUT')
$('#NextButton').setValue(newName); else if
($('#NextButtonText').nodeName == 'SPAN')
$('#NextButtonText').innerHTML = newName;} else // next button is
probably a button
$('#NextButton').innerHTML = newName;}
```



How do I add another Next button in the middle of a page?

Add this code in the HTML View:
`<div id="Buttons">`
`<input id="NextButton" type="submit" value="NEXT >>"`
`name="NextButton" title="Next" onclick=`
`"Qualtrics.SurveyEngine.navClick(event, 'NextButton')"></div>`

How do you add a header with the section names?

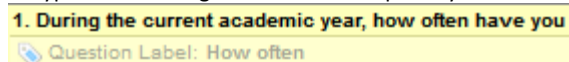
A	B	C	D
---	---	---	---

It's a manually formatted table, inserted as a descriptive text question type. You may copy and paste the header from any of the COFHE surveys, or ask Jag for the CSS.

How do I recode the values for questions?

Selecting the purple settings icon gives you have a menu item to Recode Values. By default, these are in natural order, and matrix variables key off the displayed question export tag (e.g., Q3). By checking the options available, you can recode the numerical values, recode the text that comes back for the scale point, and for a matrix, recode the question export tags.

To shorten the Question Label, click on the question text and the label to type in something shorter. This is especially useful for matrices.



Is there a way to ensure that each page of a survey has a “back” button? The most reliable way to do this is to have one question that *everyone* must see on each page. For the items that should display conditionally, add display logic on each one based on previous questions or embedded data. You can do more in the Survey Flow, copying blocks to show them in a certain sequence based on an earlier selection, but it doesn't always preserve the back button.

LOADING A PANEL (aka SAMPLE) & DEMOGRAPHICS

You can load as much or as little information as you want into a Qualtrics panel, and include the fields you loaded as data that you can use to set up conditional display logic, or for breakouts in data reports.

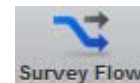
MIT's method for loading a panel involves keeping a local crosswalk, allowing us to hold the full name, student ID and email from Qualtrics. We go through all the usual steps, but then have Qualtrics generate unique links without sending email.

Once we have the final sample with all the fields we need:

1. In the sample file, create a project ID called ExternalDataReference. I usually make the first few characters indicative of the survey, then sequential 4-5 digit after that.
2. Create a CSV file with only the columns you want to load, e.g., First Name, External Data Reference, Department, and create blank columns with the names you need to have but aren't loading, e.g., Last Name, Email. You could load only an ExternalDataReference, leaving First Name, Last Name, Email blank columns.
3. Go to Panels in Qualtrics, and Create a New Panel. Import from a file, using the CSV file. Make sure the number loaded is correct.
4. Go to Distribute Survey > Email Survey In To: select the panel you just made, all the members. Send the message now, and for the actual message text, add a subject line, save it as “Link Generation”. Under Advanced Options at the bottom of the screen, select Individual Link. Select “Use email distribution link”, which will then show you “Don't send emails (for manual generation of survey links)”, which you should also check.
5. Hit Send Now, and you should be taken to the Email History screen. In the table, under the Actions menu, you should be able to select Download mailing history. The resulting file will have the External Data Reference you created, and a unique URL, ready to merge back into the main sample file with for a local mail merge.

How do I load “system of record” variables to add to responses? The partial data download doesn't have any identifiers! How do I add one to match the partials to people?

Both of these are solved by adding embedded data from your panel to the Survey's Flow. Before loading the panel to Qualtrics, make a copy of the ExternalDataReference column, and name the copy PID. Add any other fields you want to include, like major, dorm, year. Load the sample as you normally would.



Go back to editing survey you are working on, and select Survey Flow. You'll see your survey and any blocks in place, and a link to Add a New Element Here. Select Add, and add Embedded Data. In that screen, you will see “Add from Panel”. Select your panel, and you will see which fields can come in, which will include PID and the other variables. Hit ok, and then moved the embedded data block to the very beginning. All the fields you embedded will now download with your complete responses AND partial responses.

How do I use embedded data for display logic to skip questions?



Make sure you load the fields in your panel to Qualtrics, and use Survey Flow to add those as Embedded Data for your survey. For each question, Add Display Logic. In the “If” dropdown, select Embedded Data, and type EXACTLY the field name you loaded to the panel, e.g., UGYEAR, and the value you want to restrict, e.g., UGYEAR=4. That question will now only show to people in the panel with UGYEAR=4.

BE SURE TO TEST your logic by setting up dummy panelists that do/don't match your criteria.

SENDING OUT THE SURVEY

If you're comfortable loading email addresses into the Qualtrics panel, their distribution system allows you to customize the mailing quite a bit, including adding any embedded data you might want to add to the mailing. You can also use their template to easily include an opt-out link. To test, just load and invite a small panel of testers, and set up a distribution. Once that looks okay, send using the saved template to the full panel.

What do you use to send survey invitations by email?

MIT uses eCampaign from Imhsoft.com with our MIT email accounts to send out personalized emails. The software has an HTML editor for fully formatted mailings, and a lot of controls, including personalizing mail, personalizing attachments, logging emails that went out, and timing email to go out slowly and with pauses.

Once you have the panel with email addresses and links, you can save it as a CSV file to drive the mailing in eCampaign. Once the mailing list is loaded, you can insert merge fields from the CSV into the mailing, including the name, survey link, and other information you would prefer to include.

How do I generate opt-out links if I don't send email through Qualtrics?

Take the survey links you downloaded from the panel, and copy the links to a new panel. Replace everything after .com and before _MLRP with what is highlighted.

My real survey link:

mitresearch.qualtrics.com/[SE?Q_DL=80NQ5FSxh5NT2mN_50y2zLMQovS6Gqx_MLRP_b3iiedzD6OTJcJD](https://mitresearch.qualtrics.com/SE?Q_DL=80NQ5FSxh5NT2mN_50y2zLMQovS6Gqx_MLRP_b3iiedzD6OTJcJD)

My opt-out link:

mitresearch.qualtrics.com/[CP/Register.php?OptOut=true&RID=MLRP_b3iiedzD6OTJcJD](https://mitresearch.qualtrics.com/CP/Register.php?OptOut=true&RID=MLRP_b3iiedzD6OTJcJD)

Once you or the recipient visits the second link, the recipient is marked as unsubscribed in the Panel, which shows up in the distribution history as Status = Opted Out.

How do you convert long unique links from Qualtrics to shorter links?

To get something like <http://i.mp/14vQZTx> instead of https://alum.qualtrics.com/SE/?Q_DL=etgNMEUBM9gIF77_eu4p60w6gTpTUy1_MLRP_9HlM51YwspjH7pP we use Bit.ly. Bit.ly is a service you can use to convert long links to shorter ones. If you have a lot of links to convert, signup for a free account, and ask for the MIT IR Google spreadsheet to batch convert long links to shorter ones.

RESPONSE MANAGEMENT WHILE LIVE

How do I get the link for someone to edit their responses after completing the survey?

Find that person's response in View Results > Responses > Recorded Responses. If you haven't loaded email address, find the person's External Data Reference for the search. Under the Actions arrow at the right, look for Retake Survey, and you will get a link to share with the respondent.

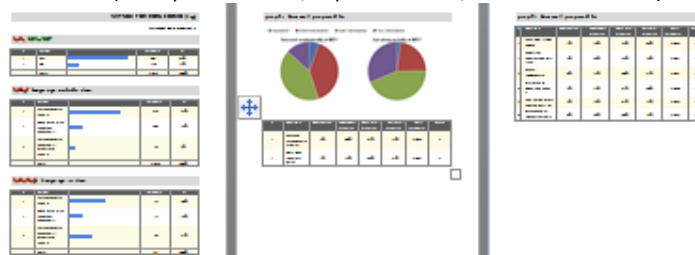
How do I delete a response or assign a response as not valid? We're very, very cautious about deleting responses. If you have records you are sure need to be removed, search for them in Recorded Responses and select each one individually to delete. It's very hard to delete all the responses from this screen, and you have to confirm you want to delete records each time. We will use this method to delete duplicate responses when that happens, survey previews, and completely blank responses.

REPORTING SURVEY DATA: LIVE & AFTER CLOSE

There are two places to work on reporting: under View Results and Reporting. Both are good, both have drawbacks. Under View Results > View Reports, you can create a report with all or only a few questions that will update while live, and share it publicly or with a password.

INITIAL REPORT UNDER VIEW RESULTS

This loads every question, and gives each closed-question a summary. The report can be exported into Word, which gives you the graphs and the opportunity to edit the text, as well as look at the open-ended comments. (Example: MIT New, Export to Word, also to Excel & PPT)



CROSTABS UNDER VIEW RESULTS

Under View Results > Cross Tabulation, you can create a report using the closed-ended questions, using other questions as Banners (columns) or Embedded Data that you loaded into the Survey Flow.

You can have multiple Banners, so if you have loaded fields like TYPE or SCHOOL, the report will extend horizontally to include those for a quick look across. To display those items, at the bottom of the Crosstab screen, select Use Embedded Data to pull the variables in. You may add %, means and some statistical tests, and highlight data that meet certain criteria:

	Gender			Total	US OR PR		Total	English first?	
	Female	Male	0%		Yes	No		Yes	No
Unprepared	10 2%	12 2%	0 0%	22 2%	19 2%	3 3%	22 2%	11 1%	11 4%
Somewhat prepared	115 23%	120 23%	0 0%	235 23%	196 21%	37 38%	233 23%	162 21%	71 27%
Quite well prepared	230 47%	216 41%	3 100%	449 44%	411 48%	38 38%	449 44%	338 48%	109 41%
Very well prepared	137 28%	184 35%	0 0%	321 31%	291 32%	29 27%	320 31%	246 32%	74 28%
Total	482 100%	532 100%	3 100%	1027 100%	917 100%	107 100%	1024 100%	757 100%	265 100%

CROSTABS UNDER REPORTING BETA

You may embed a crosstab created in View Results in the Reporting Beta. The Reporting Beta allows you to drilldown by questions and embedded data as well, but the output isn't as compact. It does have more flexibility, in that multiple surveys can be included in one report, it's easier to select/remove questions to include in a report, and you can add and edit text in this reporting area.

One concern with any large dataset for the Reporting Beta is how long it takes to generate, so it may be best to wait until a large survey is closed to use this feature.

RECOMMENDED SETTINGS IN SURVEY OPTIONS

MIT usually has only the following Checked: Back Button, Save & Continue, by Invitation only, Default end of survey message. How long to wait before partially completed surveys are closed and data is recorded = long time. COFHE surveys are set to 3 months.