Building Qualtrics Surveys for EFS & ALC Course Evaluations: Step by Step Instructions

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• A relatively quick guide with detailed explanations of each step.
• It’s recommended to read this guide in full before beginning any steps.
• The steps below are generally successive and can be followed exactly as listed. If preferred, judgment can be used to determine any tasks that can be done earlier or later than the order listed here (e.g., Step 5 can be done earlier; Step 4 can be done any time before Step 11).
• **Certain tasks, in bold/italics, are to gain info or help from Language Center staff.** Make these a priority in completing early, as non-completion of these tasks will prevent you from going forward.
• Recommended time-frame for starting this work is at least two weeks in advance of when the evaluations will be sent out. Everything should be completed by at least two days before the send date.

**Preparation:**

1. **Talk with Connie (EFS) or Robyn (ALC), Ken, and Tracey** to obtain the following info. You will need ALL of this info when creating the surveys.
   a. The date and time that the surveys should be sent out to students (usually a week before classes end) and when is the deadline for completion (usually before the last day of class).
   b. All of the course and sections you’ll be creating surveys for, as well as any additional evaluations you’ll need to create (e.g., Overall program eval, Academic consultant mtg eval).

   In 2013, EFS had the following five surveys:
   i. Program Eval (sent to all students, so 1 copy was made);
   ii. Writing course Eval (5 copies: one for each section);
   iii. AC Mtg Eval (4 copies: one for each section, and one section did not have an AC);
   iv. EC course Eval (4 copies: one for each section); and
   v. LD course Eval (4 copies: one for each section).
   d. Confirm all the staff who will want the surveys to be shared with them. Sharing will allow them to view the surveys and the responses as they come in. You will definitely be sharing with Ken and Connie. Surveys must **never** be shared with instructors.
   e. Class lists. You will need a CURRENT list of students in each course and section. Actually, you don’t even need the names of students; you just need their email addresses. You need class email lists because you
will be sending the surveys to students’ emails, and you must input this information into Qualtrics when you schedule the mailings.

i. The best way to do this is probably to ask someone to add you to all of the EFS or ALC CourseWork sites – as long as the class lists on CW are up to date. If CW won’t work, ask about an alternative.

ii. Note: you will probably not be able to do this step for ALC at the same time as EFS, because class lists for ALC are not finalized until later.

2. Create an Excel document of your class lists. The formatting of this must allow you to group emails according to section/survey they will be receiving. You will be copy-pasting email addresses for each survey into Qualtrics in Step 4. Tips for making your Excel document:
   a. If you’re using CourseWork, go to the section site and click on “Site Info” to see the lists of students in each class. You can then copy and paste or type the info from there into your document. Be sure you do not copy TA’s or Instructors into your class lists! CW lists these people on the site members page, so be careful.
   b. To help with formatting and efficiency, see the 2013 class lists documents for EFS and ALC in the electronic files. For EFS, I started with an email list I already had on file of all the students, and then used CW to label the students in each section. (For example, I went to Site Info for LD-01 on CW, then typed “1” into the appropriate Excel column next to all the students that were members of this class.) When finished with all courses, I used Excel’s Data- Sort to group the emails by section; only do this if you’re experienced with the sort function already, as making a mistake here could result in students getting the wrong surveys. As an alternative method (used in the 2013 ALC document), simply copy and paste each student's email address from CW into Excel beneath the section heading they are in.
   c. Only use the Stanford email addresses of students.
   d. Double-check the spreadsheet when you are done to make sure it’s accurate with CW. This step is very important!

**On Qualtrics:**
3. Use your Stanford email to register/log-in to Qualtrics.

**Creating Panels:**
4. Create Panels of email addresses. Qualtrics panels allow you to store many different lists of email addresses, which you can then easily call up to use when you schedule surveys to be emailed. Think of each panel as the set of addresses that will go in the “To” field of the survey email. Generally speaking, you will need to create a panel for each survey you send, but see 3hi for more info about ways to save time on this step. You will use your Excel class lists doc (from Step 2) to do this step.
   a. In Qualtrics, click on “Panels” at the top.
b. Click on “Create New Panel.” It is a green button in the top-right.

c. Give your panel a Name. The name should be reflective of the course section the emails correspond to (e.g., “688W-01”). Leave the Destination option as the default. Then click “Create.”
   i. **Tip:** Name your panels as specifically as possible. You will have many panels by the time you are done, and it is important you keep them organized well.

d. Click on the option to “Add Panel Members” on the left.

e. Open your Excel class lists document, and copy the group of emails for the section you are currently working with (e.g., 688W-01). In Qualtrics, put your cursor in the first cell under “Email” and then paste. Each address should be on a new line. Do not worry about blank spaces at the end, or adding info to the First Name and Last Name columns. Click on Save.

f. A page will appear listing all the email addresses you just pasted. There should be green circles next to all of them, which means they are ready to be used by the system. If you see a different colored circle, there is a problem.

g. Click on “Panels” in the top-left.

h. Repeat steps 4b-4f to input the class lists for each survey you will be sending.

   i. **Tip:** You do not need to create different panels for any two surveys being sent to the same group of students. In other words, you can use the same panel to send more than one survey whenever those surveys are going to the same group of students. For example, LD-01 and EC-01 are the same group of students, so you could create a panel labeled “LDEC-01” and use this panel when mailing both the LD-01 and EC-01 surveys. However, if this is more confusing to you, don’t do this and simply create a new panel for each new survey you’ll have. The advantage I see for my suggestion is that it will save you time and you will have fewer panels by the end. However, keeping clear and organized is the most important; do what feels best.

ii. In 2013, the following panels were created:

   1. AllEFS (39 students) – for sending the program eval
   2. 688W-01, 688W-02, 688W-03, 688W-04, and 688V. (Each had 3-10 students.) These panels were used to send to each group both the Writing course eval and the AC Mtg eval. (For example, the 688W-01 panel was used when sending the 01 Writing eval, and to send the 01 AC Mtg eval; the group of students is the same in each.)
   3. 688LDEC-01, 688LDEC-02, 688LDEC-03, and 688LDEC-04. (Each had 9-10 students.) These panels were used to send both the LD and EC evals. (The 688LDEC-01 panel was used to send the LD-01 survey, and to send the EC-01 survey.)
i. Check that your Panels are accurate compared to the CW site members. You should have already checked accuracy of your Excel document, but this step is still important because there may always be errors in copy-pasting from Excel to Qualtrics.

Creating Surveys & Making Copies:

5. **Ask Ken to share with you and Connie the three templates from last year’s surveys.** You should receive three templates:
   a. EFS program evaluation;
   b. AC Mtg evaluation; and
   c. Stanford’s course evaluation, which is a replicate of the Axess and paper versions. You will use all three of these for EFS. You will use only the third template for ALC evals.

6. **Confirm with Connie that she has the templates. Ask her to confirm whether there are any changes she’d like to make to the surveys.** You will insert her changes during step 7c. Allow her at least a few days to do this before moving on to Step 7.
   a. One suggestion I have is to insert the name of the course at the top of each Writing, LD, and EC class survey.

7. You must now create a copy of each template that was shared with you and edit it. DO NOT simply rename a survey that was shared with you (otherwise, you won’t be able to share them with others, which you’ll need to do). In step 8, you will make multiple copies of your templates to create all your surveys. First, in this step, you must make edits to your template so that the changes will carry over into your copies. The purpose of this is to avoid making edits to every single survey.
   Here’s what to do for each of the three templates:
   a. Go to My Surveys and click on “Copy” to the right of the template survey that was shared with you.
   b. Rename it to reflect the current year and your labeling system. Keep “Copy to” and “Destination” options as the default.
   c. You should see this new survey appear at the top of your “My Surveys’ page.
   d. Click on “Edit” to the right of the survey to make any changes that Connie has requested. Confirm your changes have been updated.
   e. Click on “Edit” and then on “Survey Options.” Check off the options you see on the next page. Familiarize yourself with these functions so you know the details of how your survey works! Under SurveyExpiration, input the exact date and time that the survey is to be active (from 1a above). Click on “Save Changes.”
   f. Repeat steps 7a-7e for the other two templates.
      i. Note: if you are inserting the name of the course at the top of the course surveys, you will have to essentially create five templates instead of three: 1) EFS program; 2) AC Mtg; 3) Writing; 4) LD; and 5) EC.
For Step 7e: Survey Options
Check off the following:
- back button; save and continue
- by invitation only; prevent ballot box stuffing; prevent indexing;
  Survey Expiration (make sure this is accurate!)
- default end of survey message; anonymize response
- default inactive survey message

Survey Options

Survey Experience
- Back Button: Enable respondents to change their responses.
- Save and Continue: Allow respondents to save and continue later.
- Show Export Tags: Helpful for survey collaboration.
- Use Custom Survey Validation Messages

Survey Language: English
Survey Title: Sur12-EFS-006 Program Evaluation | Qua
Meta Description: Survey Software, Enterprise Survey Tools
Survey Exp: The survey will only be available for a specified date range.
This survey is from: 08-11-2013 00:00 to 08-21-2013 23:55
Time zone: America/Los_Angeles

Survey Protection
- Open Access: Allow anyone to take this survey.
- By Invitation Only: Allow only those who receive Invitation emails to take the survey.
- Prevent Ballot Box Stuffing: Keep people from taking this survey more than once.
- Prevent Indexing: A tag will be added to the survey to prevent search engines from indexing it.
- Survey Expiration: The survey will only be available for a specified date range.

Survey Termination
- Default end of survey message.
- Redirect to a single response report.
- End of survey message from a library...
- Send additional thank you email from a library...
- Anonymize Response: Do NOT record any personal information and remove panel association (not recommended).

Inactive Surveys
- Default inactive survey message.
- Display inactive survey message from a library...

Partial Completion
How long to wait before partially completed surveys are closed and data is recorded.
Please note, the recipient cannot continue taking the survey once their data is recorded:
- After 1 Week

Response Set
New responses go into: Default Response Set.
Manage Response Sets
Response sets allow you to place survey responses into different buckets. For example, quarterly or monthly surveys could be collected in different buckets. This allows you to view results of the same survey for different collection periods.
8. Now that you have your own templates and they are exactly as you’d like them to be, you can create multiple copies of them until you have all the surveys you need. Click on “copy” to the right of your edited survey template, and rename it to its proper name. Repeat for each template until you have the correct number of surveys of each type (from 1b above).

**Sharing & Activating Surveys:**

9. Share every survey with your collaborators (from 1d above). Unfortunately this must be done manually for each survey.
   a. Under My Surveys, click on Collaborate to the right of the survey.
   b. Enter the first person’s email address. Click Add.
   c. Click OK on the message to invite the person to collaborate.
   d. Repeat steps 9b-9c for each of your collaborators.
   e. Check off ALL boxes next to each person’s name so that they have full privileges. Click Save.
   f. Repeat steps 9a-9e for each of your surveys.

10. **Send an email to Ken notifying him that all surveys were shared with him. Ask Ken to please activate all the surveys.**
    
    a. Allow at least a few days, if not a week or so for Ken to do this.
    b. Ken must do this step because student accounts are restricted to activating only two surveys at a time; Ken’s account is unrestricted.

**Scheduling Survey Mailings:**

11. Once your surveys are active, you will see a green check mark to the left of the survey. At this time, you are able to schedule the mailings to students. You must schedule the mailing for each survey individually. To do so:
    
    a. Click on Distribute Survey at the top, then on Email Survey.
    b. Select a survey from the drop-down menu.
    c. In the “To” drop-down menu, scroll down to “My Library: your name”, then scroll to the appropriate panel of emails. Once there, scroll to the right and select “Select Entire Panel.”
    d. In the “When” drop-down menu, select “Custom.” Input the exact date and time that the surveys are to be mailed to students.
    e. In the Message field, enter a subject line that will make sense to students (and to you). When you send instructions to students (in Step 13), you should reference the subject line so students can find the emails easily. Each different survey that a student receives should have a different subject line.
    
    i. In 2013, I labeled them as “EFS Evaluation #x” where x was 1-5. I thought it would be easy for students to remember that they had to complete five evals. Alternatively, you could label them according to survey type, such as “EFS Program Evaluation,” “EFS Writing Course Evaluation” etc. This might help students to know what they are evaluating, but this is not necessary if you put the name of the course at the top of the survey, or within the text of the email itself. I decided against it because my priority was for students to remember all the
surveys to complete, and I reasoned it’d be easier to direct them with numbers rather than names.

f. In the text of the email, type at the top and in bold the name of the course AND instructor. This reduces confusion and student mistakes. For example, “This survey regards your afternoon EC class with Esther Chan.” Leave the rest of the pre-loaded message intact.
   i. Tip: Save your message text so that on repeating successions of these steps with other surveys, you can use the saved text and then change the name of the course and/or instructor. This is faster than re-typing the entire sentence for every survey. To save a message text, click on the green “Save As” button just above the message field on the right. To insert saved text, click on the drop-down menu beneath the subject line, on the left.

h. You will be taken to the “Email History” tab. This page lists all mailings of the survey that you have scheduled. If you need to preview or change anything about your mailings, go to this page and click anywhere in the row.

i. Check carefully that all fields are correct: Recipient (your panel of emails); Subject line of email; Date to be emailed. All other fields should be 0 until the surveys are mailed.

j. Repeat steps 11b-11i for all surveys.
Sending Instructions & Reminders to Students:

12. Now, your surveys will automatically be emailed to the appropriate groups of students at the set time. You do not need to log in to Qualtrics for the surveys to be emailed at the proper time.

13. Students must be emailed a set of instructions on the purpose of the surveys, a day before and/or at the same time that they receive the surveys through email. I think it’s good to send instructions at both time-points. Use the 2013 document as a guide. The instructions should include:
   a. The purpose and importance of course evaluations
   b. That they will be receiving emails to their Stanford emails with links to evaluation surveys
   c. The number of emails and surveys they will receive, the date/time they will receive them, and the subject lines of the emails.
   d. The deadline for completing surveys
   e. Assurance that all surveys are anonymous
   f. A special note to ignore emails from Stanford to complete course evaluations on Axess.

14. Ask instructors to make announcements in their courses about completing the evaluations.

15. Send a reminder email to all students to complete their evaluations once every day after the surveys go out. Use the 2013 reminder email document as a guide.

16. Keep an eye on the number of responses coming in. If any courses have very low numbers, you can ask the instructor to remind them again. Connie may also have some other ideas.

Downloading Response Data:

17. After the survey deadline, the surveys should become inactive and the green check box will no longer be marked to the left of each survey.

18. **Talk to Connie about how she would like the data files to be labeled.** You will be downloading them from Qualtrics and sending them to her, so she can then send to instructors.

19. You must download the responses of each survey individually. Please note that this data is confidential and should not be seen by others. To download survey response data:
   a. From the My Surveys tab, click on “Results” to the right of the survey. Or, go to the View Results tab, and choose the survey you want from the drop-down menu on the top-left.
   b. From here, you have a few different download options. What worked well in 2013 was the following: Click on “Initial Report” in the middle of the screen.
   c. Near the top-right corner, find “Export Report” and click on the pdf icon. You could also download to Excel or Word. The report that downloads should show every response and stats for each question, such as bar graphs, averages, and number of responses.
d. Immediately save the file to a separate folder and rename it with the instructor's name and course title, according to the system you spoke about with Connie.

20. After you have one file downloaded, send it to Connie and Tracey to confirm that this formatting is ok. If they want a different formatting option, try downloading to Word or Excel or play with the other data options in Qualtrics. Once they give their OK, you can move to the next step.

21. Repeat steps 19a-19d for all surveys.

22. Email all data files to both Connie and Tracey.

23. Ask Connie to verify that she has all the evals and that they are in a proper format, and she does not need any more data from the surveys. Ask her to confirm that you can delete the EFS surveys on Qualtrics. Please allow several days or a week for her to do this.

24. Once you get the go-ahead from Connie, delete all but one of each type of survey so that they can be used as templates for next year. Save at least three templates: 1) Program eval; 2) AC Mtg eval; 3) course eval.
Special Note about Correcting Student Mistakes:
Because the surveys are only allowed to be submitted once, students cannot change answers after submission. Someone may email you saying they made a mistake or were thinking of the wrong course (which is also why many survey labels are so useful).
You don’t have to do this, but you can allow a student to retake a survey by doing the following:
1. Ask the student to tell you the date/time he started and/or submitted the survey.
2. Go to the View Results tab, then select “Responses”
3. Select the appropriate survey from the drop-down menu.
4. Find the date/time that corresponds to the student’s error submission. (If more than one are very similar, click on the Response ID in blue to view responses. Pick out a few key words the student wrote in a question and ask if it is his.
5. Find the drop-down menu under Actions next to the appropriate response set.
6. Select “Retake Survey” so the old, incorrect response will be replaced.
7. Email the link that appears on the screen to the student.
Special Note about ALC Evaluations:
ALC evaluations are emailed out about a week after EFS courses end. You will be creating the ALC surveys during this week interim. There are a few complications that arise with the ALC evaluations. This is because there is a limit on students’ Qualtrics accounts that allows you to have no more than 20 surveys at one time that you’ve created or copied. There are no limits (that I could find), however, on the number of surveys that are shared with you. ALC in 2013 required 24 surveys. This is beyond the number limit of what you are allowed to create or copy. Remember that at this time you should also have 3 EFS surveys still in your account. This means that you will be unable to make the last 7 ALC evaluations on your own.

These instructions will inform you how to complete ALC evaluations successfully:

2. Make a copy of the course eval template and rename it for ALC. (Follow Step 7 above to edit the survey options). Change the start and end time to reflect the ALC evaluation dates!
   - ALC only uses one type of survey: the course evaluation. There are two courses (TD and EC) that each student evaluates. It may be good to put the course name at the top of each survey, which would require you to create two templates before copying them.
3. Go through Steps 8 and 9 to copy and add collaborators to all the surveys you can.
4. **Once you have reached your limit, email Ken and ask him to make 7 copies of one of the surveys he just received. He will have to also add you and Robyn (and anyone else you want) as collaborators.**
5. Accept the invitations to join Ken’s 7 surveys. Rename them to reflect their respective courses. Check that any heading of TD or EC in the survey itself is accurate.
6. **Once that is completed, ask Ken to please activate all 24 ALC surveys.**
7. Follow Step 11 above to schedule the survey mailings.
8. Follow the remaining steps to send instructions and reminder emails, and download survey data. ALC data will be sent to Robyn.