

Exploring the New Qualtrics Platform

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OBJECTIVES

- Explain governance structure
- Walk through the Insight Platform
- Highlight new features
- Questions
- Tinker / In Depth Look at Feature

First, some reassurance ...

The upgrade will not affect current or past surveys/data.

Everything will migrate as is, with the addition of new functionality.

Until June 21, you can toggle between the "old" and the "new."

OCIO Governance Structure

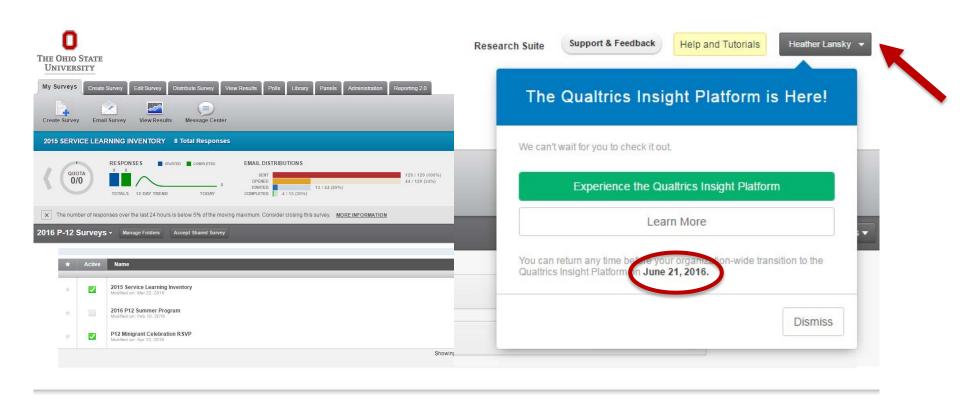
- Qualtrics enterprise-wide, OCIO managed
 - The only tool on contract*
 - Must have use-case for other tools (e.g. SurveyMonkey)
- Governance structure under development

^{*}Source OCIO Knowledge Base KB04697

WHY DID THEY DO THIS??

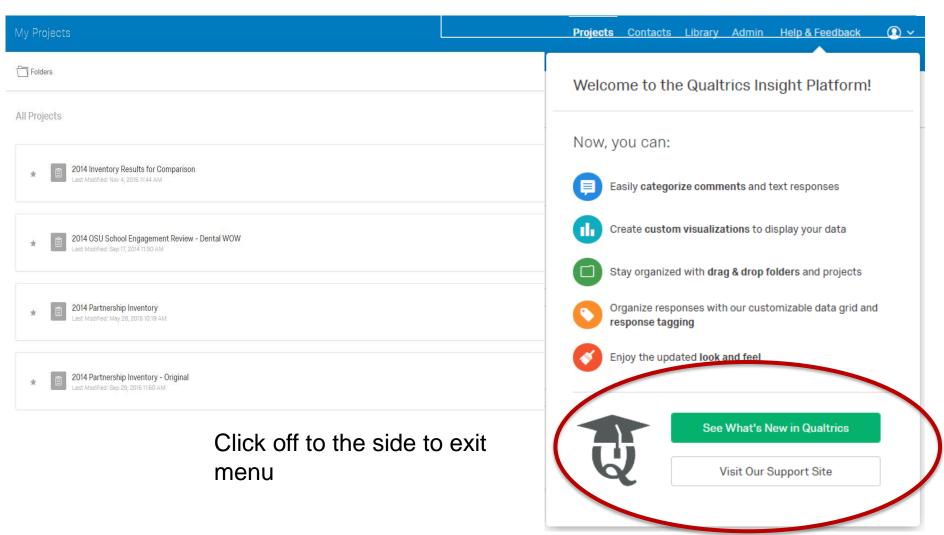
- Rebuilt from the ground up
- Previously different "flavors" of Qualtrics
 - We've had the Research Suite
 - Redesign integrates all to a single platform
- Opportunity to improve functionality
- Add new features

GETTING THE NEW PLATFORM

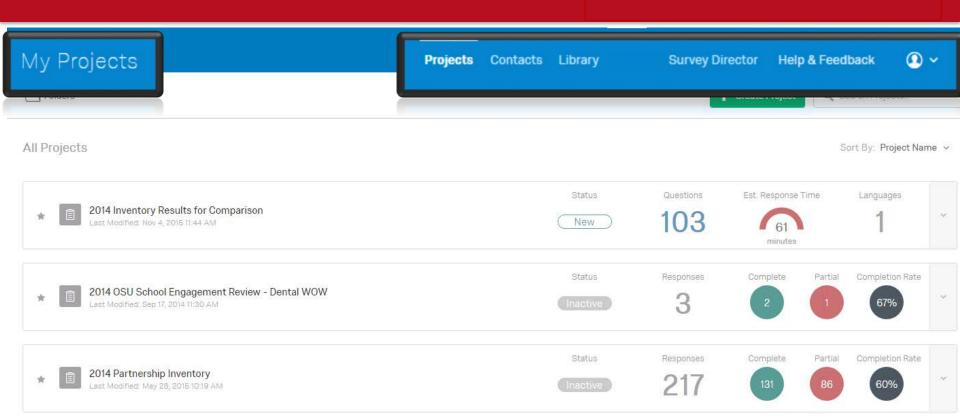




SUMMARY OF CHANGES

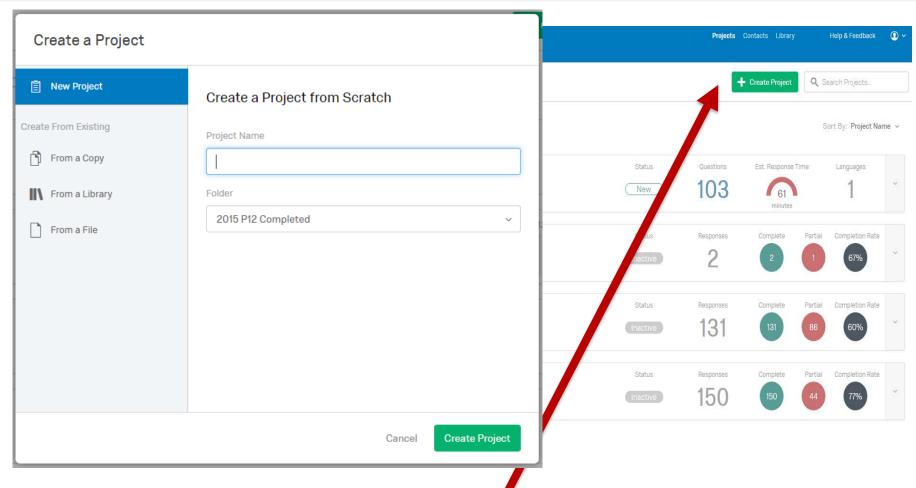






- Projects, Contacts, and Libraries are separated and moved to the upper righthand corner.
- My Projects is in the upper left corner and is a navigation to project folders
- These sections are visible from every screen, allowing you to easily move between functions from anywhere within the platform.

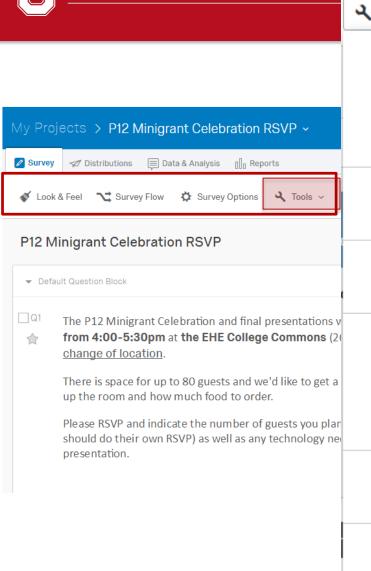


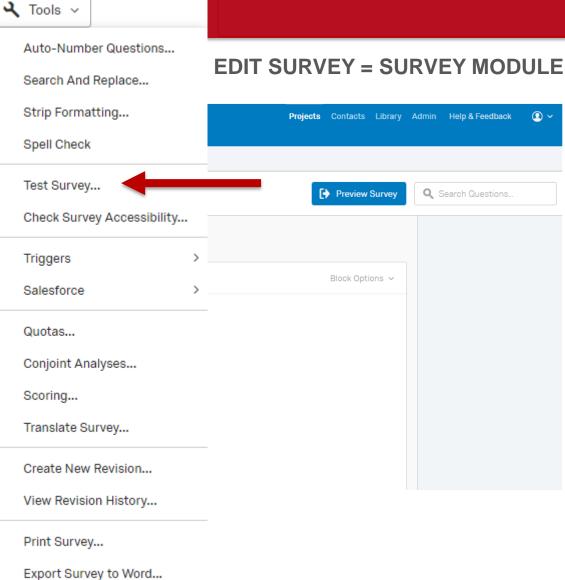


Create Survey renamed to Create Project



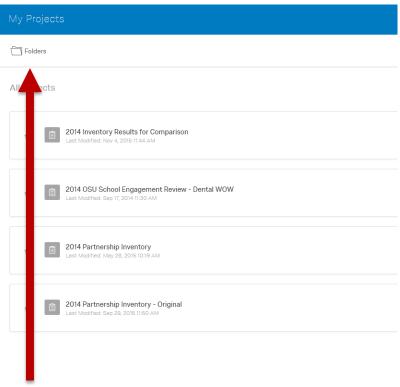
THE OHIO STATE UNIVERSITY



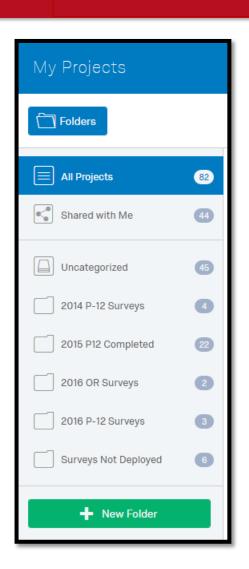


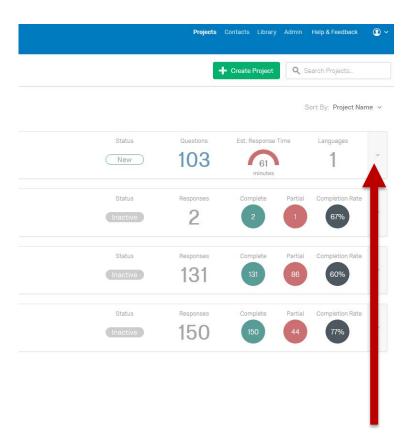
Export Survey

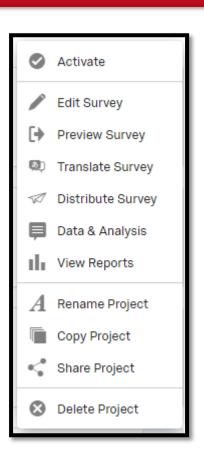
Import Survey...



Click Folders to navigate surveys

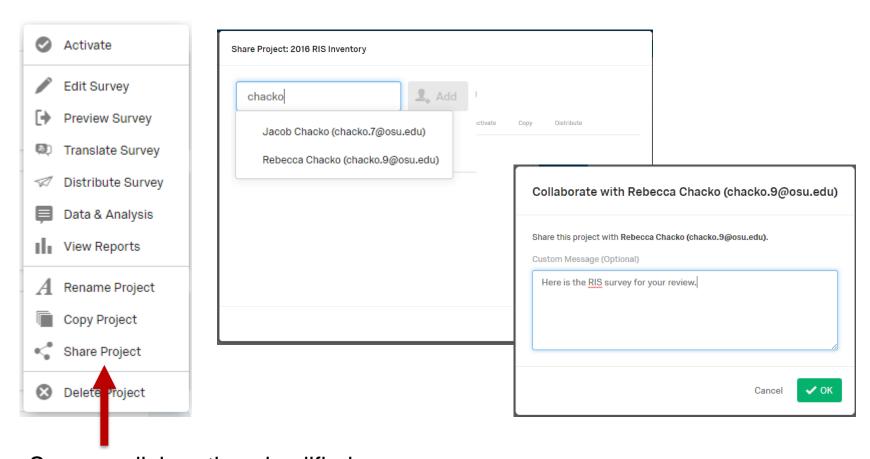






Survey tasks moved to the Project Options dropdown





Survey collaboration simplified Everyone gets an email notification and collaboration codes are no longer necessary

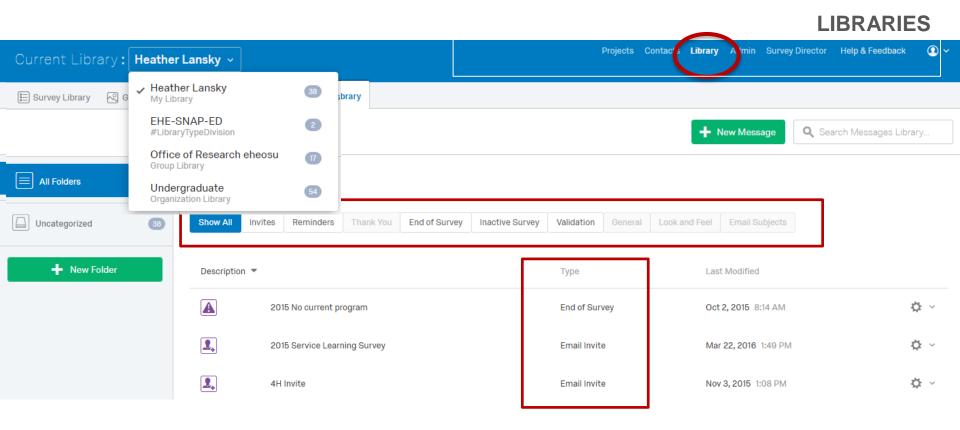


Panels have been renamed Contacts Use Dropdown beside survey name contact management

CONTACTS

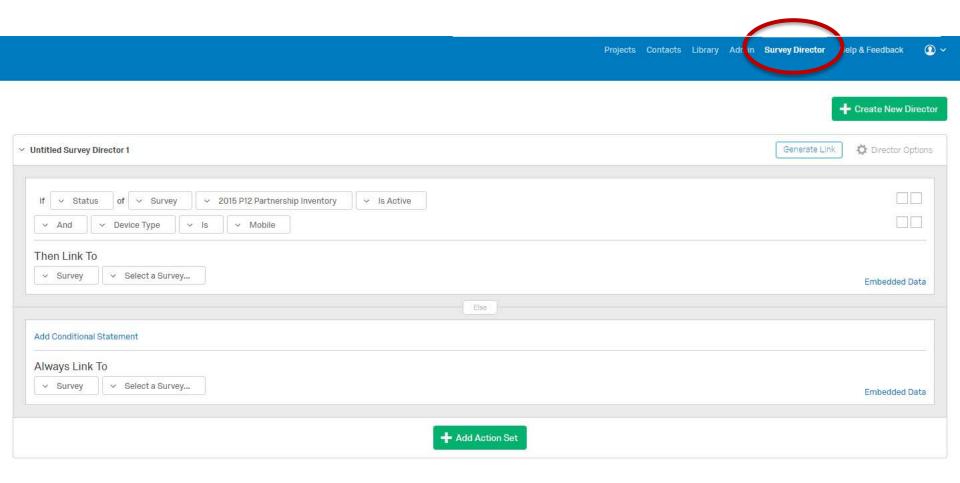
Contacts : Heather L	Lansky > 201	5 Service Learning Inventory	·	Project Contacts ibrary Survey Director	Help & Feedback (1) 🗸
				+ Add Contac	ts 🗘 List Options 🗸
Add Filter ∨					
✓ Apply Filter					
No Items Selected ∨					
Opted In	First Name	Last Name	Email		
	Michelle	Abate	abate.30@osu.edu	 Click for full contact i 	nfo
	Eric	Anderman	anderman.1@osu.edu		
	Theresia	Anggraini	anggraini.4@osu.edu	Edit View History	
	Bruce	Arnold	arnold.1041@osu.edu	Email: abate.30@osu.edu	
	James	Austin	austin.38@osu.edu	Language: Not Specified	
_ •				FromList: Active Pis Group: Faculty	



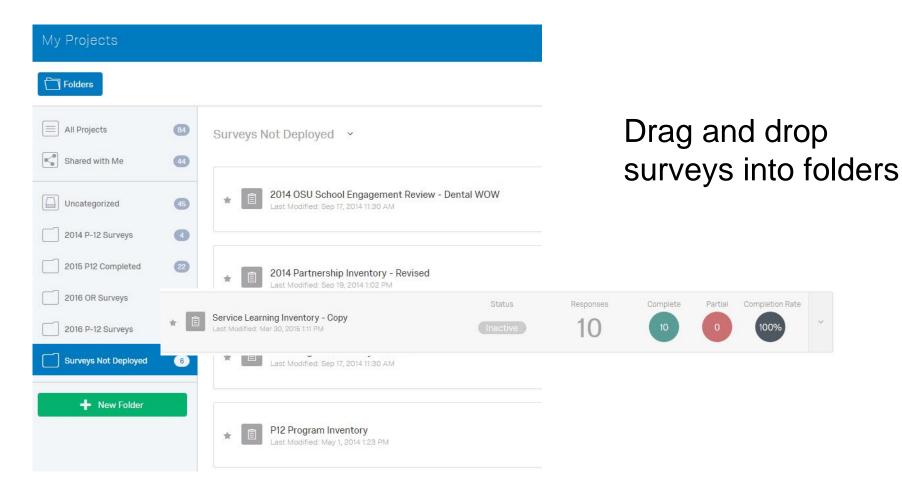


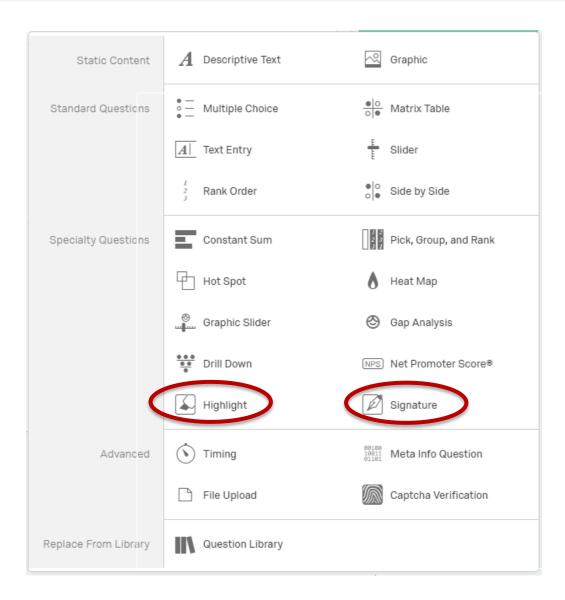


SURVEY DIRECTOR



New Functionality

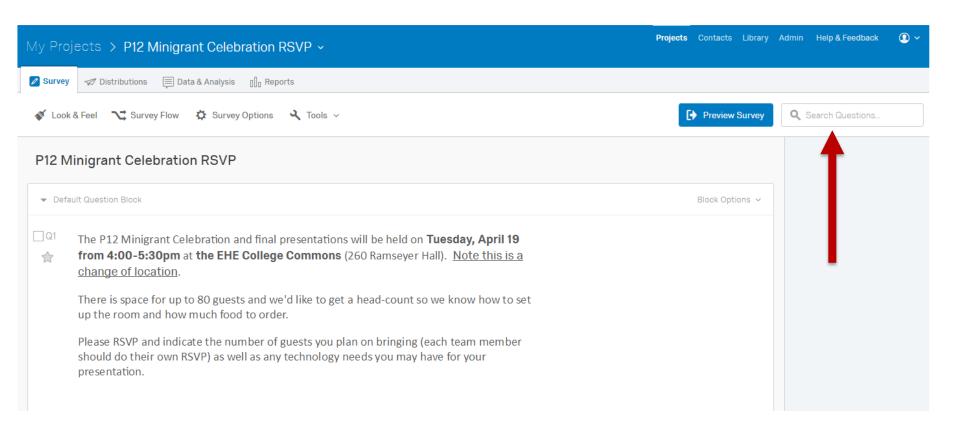




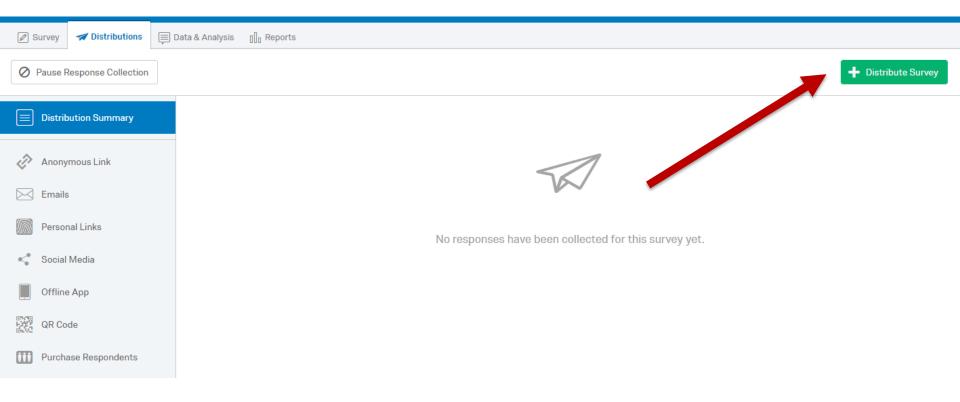
New question types:

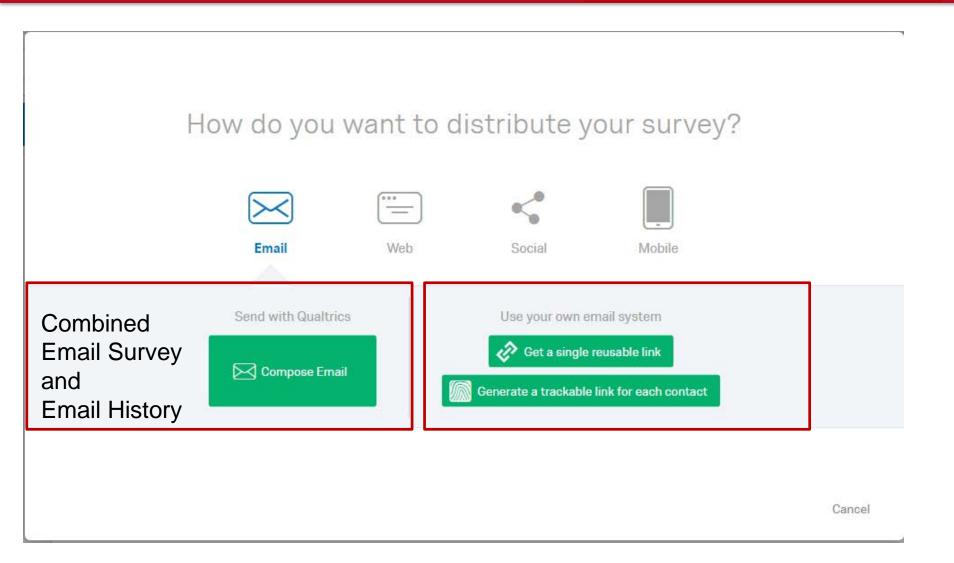
- Highlight
- Signature













Link Type:

Individual v

until survey is started.

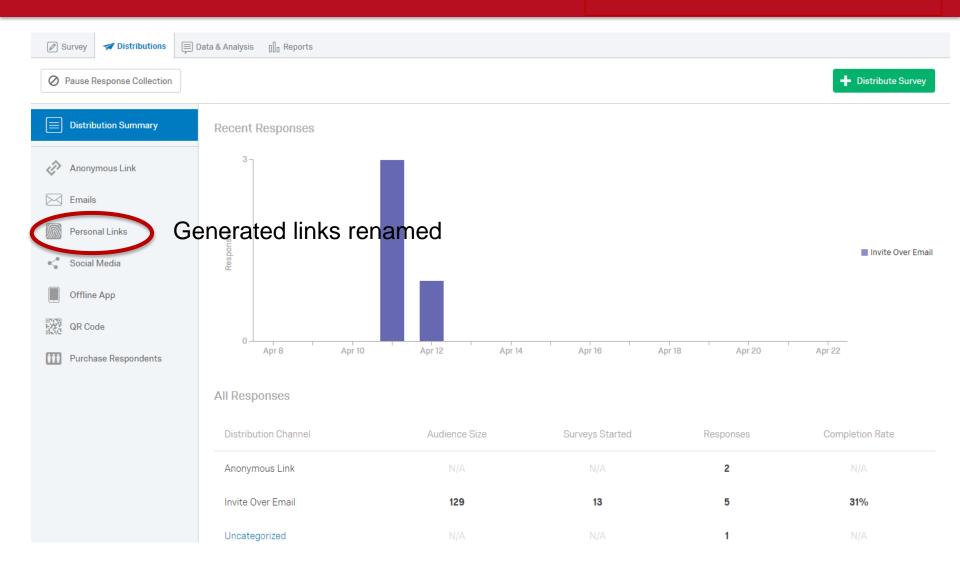
Compose En	mail					
То:	Select Contacts V					
From:	From Address From Name Reply-To Email noreply@qemailserver.com Heather Lansky Iansky.8@osu.edu					
When:	n: Send in 1 hour v					
Subject:	Subject V					
Message:	Load Message ∨ Save As Save As Size → B I U x₂ x² A → A → A → A → A → A → A → A → A → A					
	Follow this link to the Survey: \${I://SurveyLink?d=Take the survey}	*				
Show Advanced Opt	tions Cancel Send Preview Email ✓ Send in 1 hour					

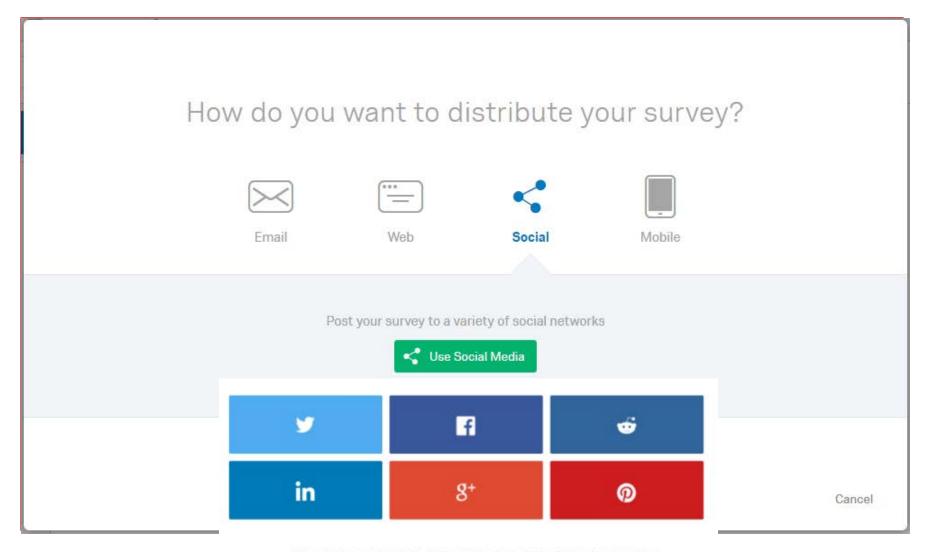
✓ Do not mark responses as "In Progress"

Link Expiration:

Expires in 60 Days v







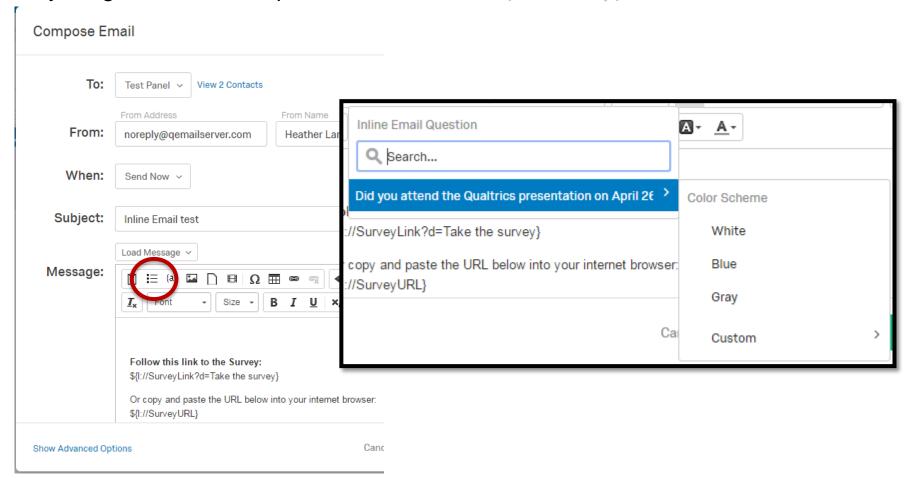
SMS is currently only available as a purchased add on.

- Send to known mobile numbers
- Post a send-to number (e.g. text Qualtrics to 12345)

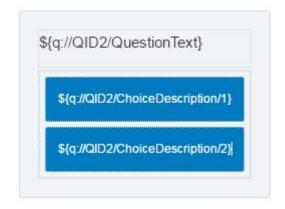


INLINE EMAIL QUESTION

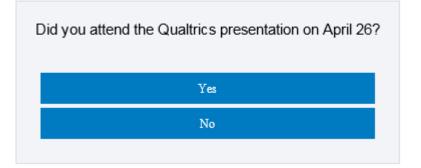
Only Single Answer Multiple Choice and NPS question types can be used



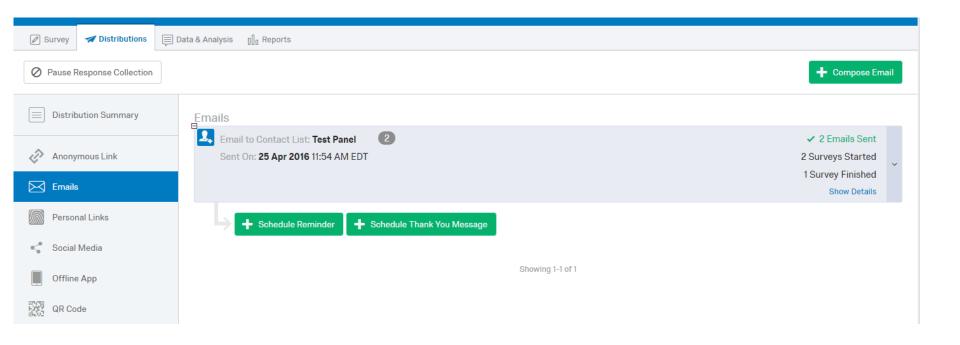
DESIGN VIEW



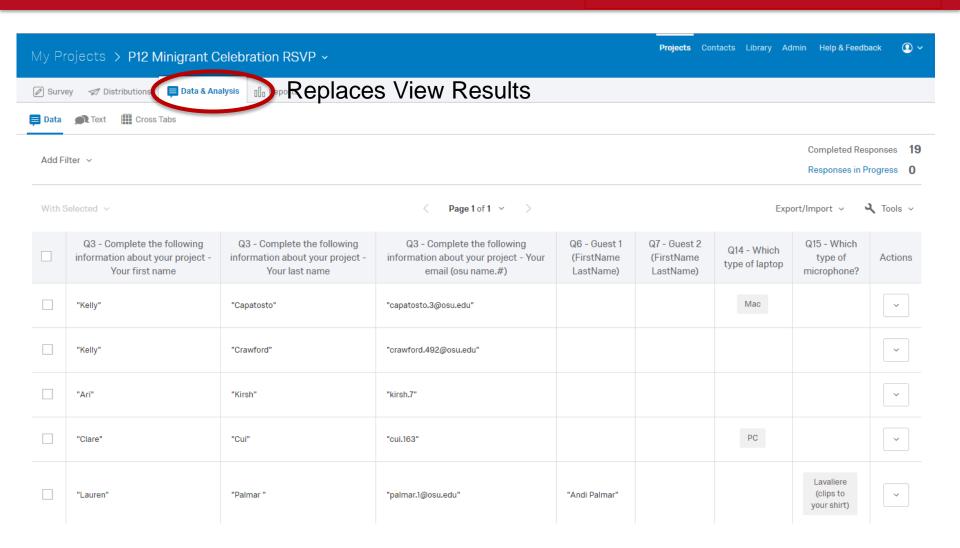
SURVEY VIEW



MANAGING EMAILS



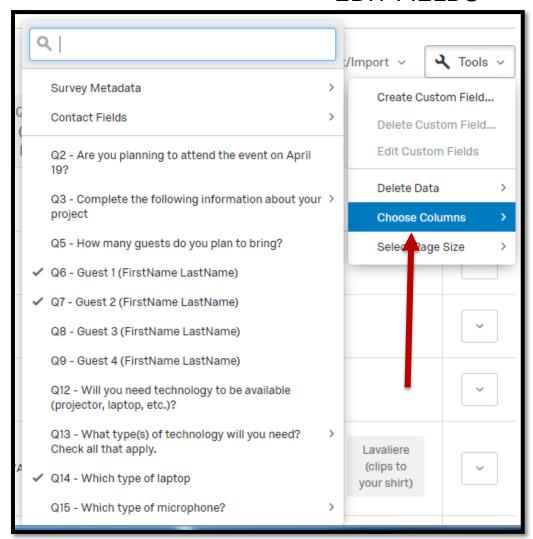




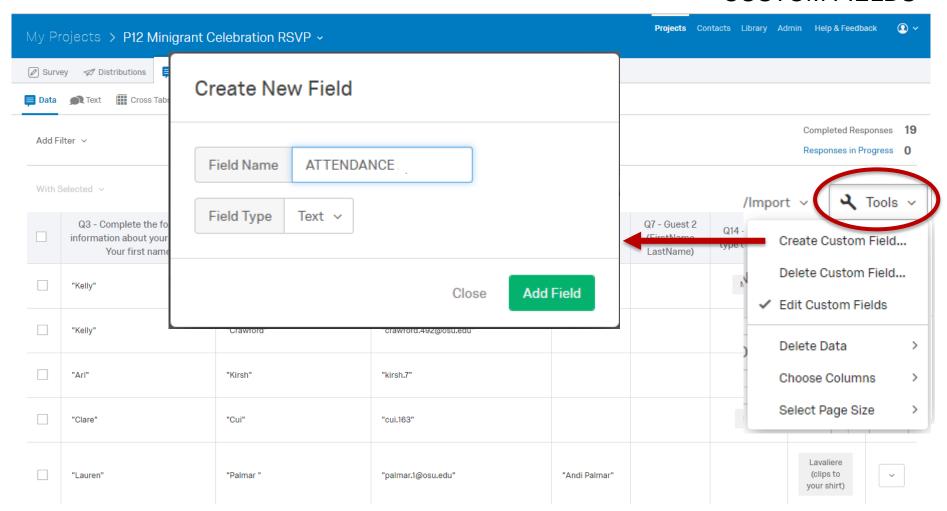


Projects Contacts Library Admin Help & Feedback ① × Completed Responses Responses in Progress 0 t/Import Tools Q7 - Guest 2 3 - Guest 1 Create Custom Field... irstName (FirstName astName) LastName) Delete Custom Field... Edit Custom Fields Delete Data > Choose Columns > Select Page size > PC Lav (clip idi Palmar" your hirt)

EDIT FIELDS

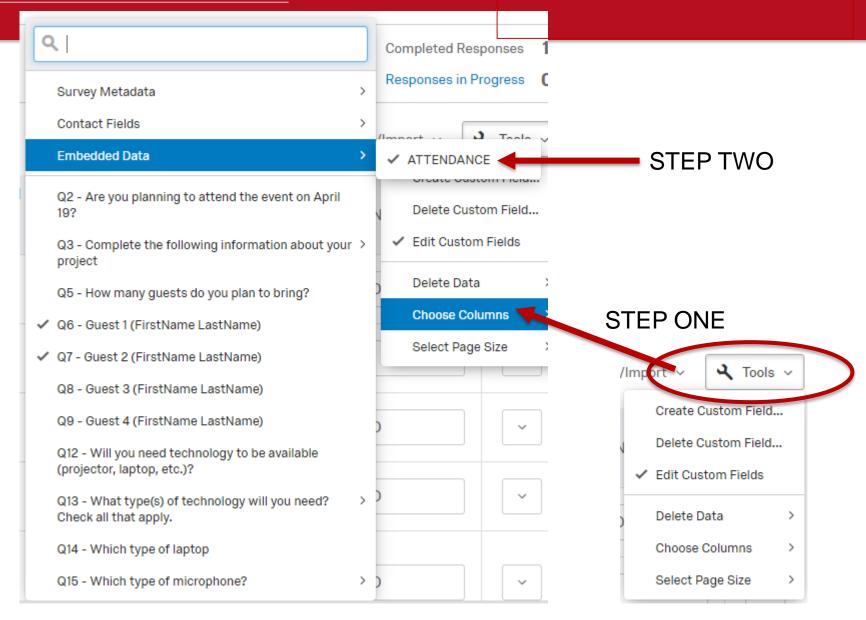


CUSTOM FIELDS

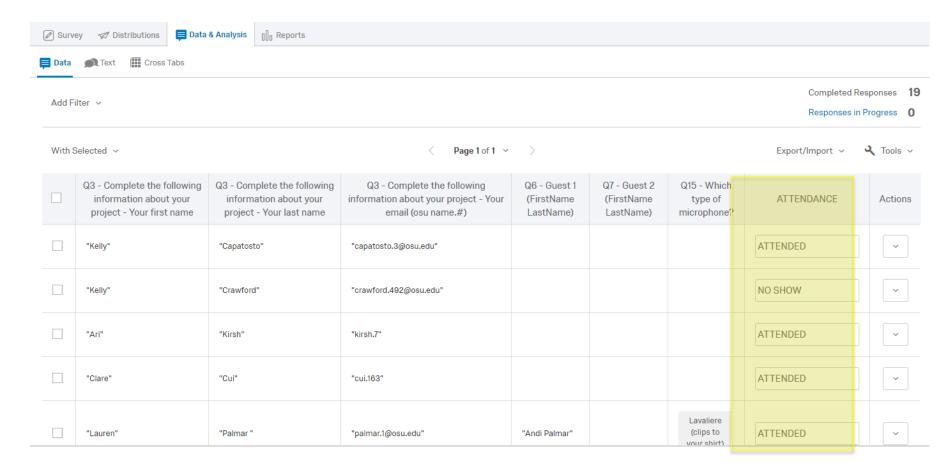




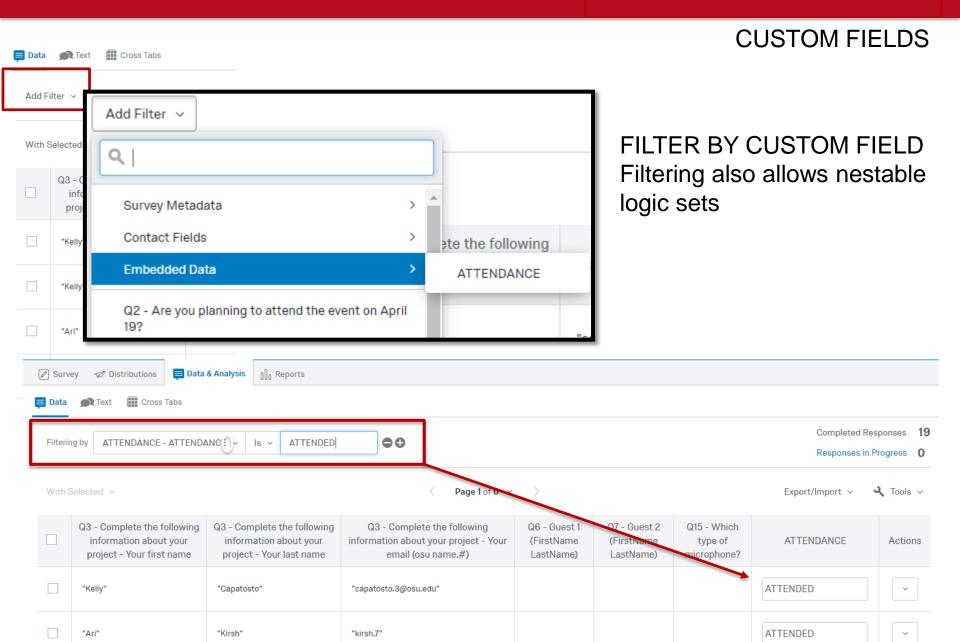
THE OHIO STATE UNIVERSITY



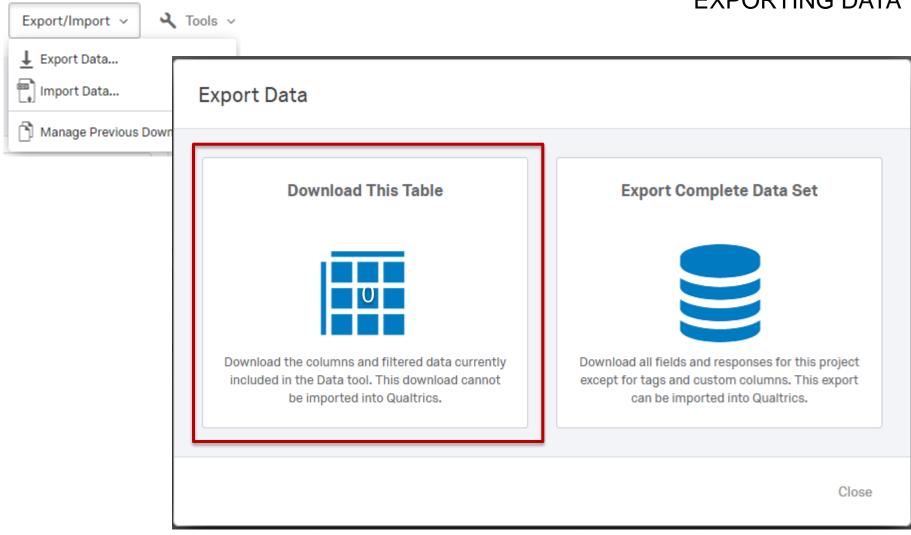
POPULATE THE NEW FIELD (MANUALLY)



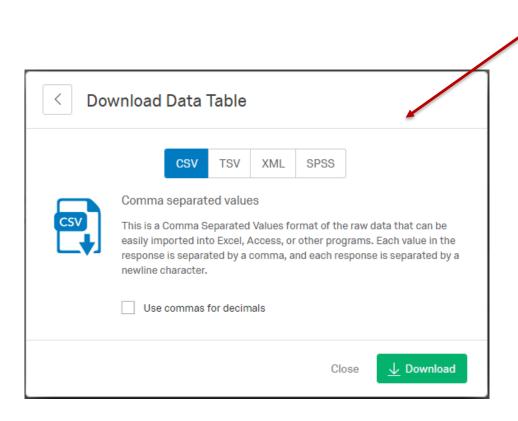




EXPORTING DATA



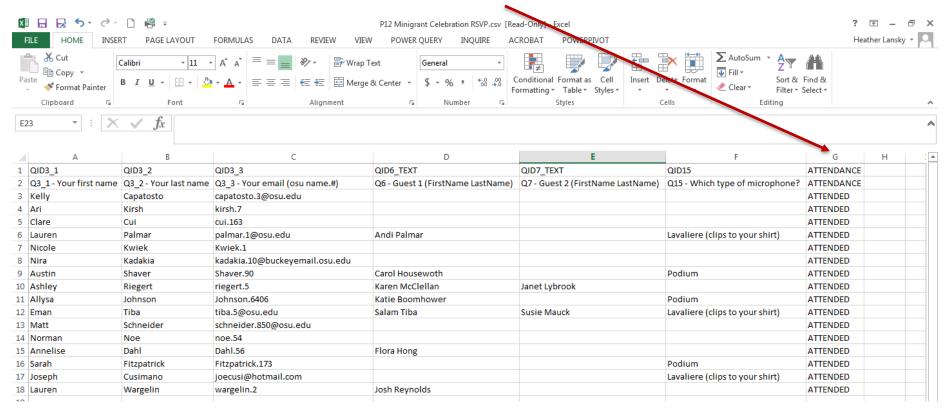
CUSTOM FIELDS / DATA EXPORT





CUSTOM FIELDS / DATA EXPORT

New field is exported and data set is filtered



Export Data

Download This Table



Download the columns and filtered data currently included in the Data tool. This download cannot be imported into Qualtrics.

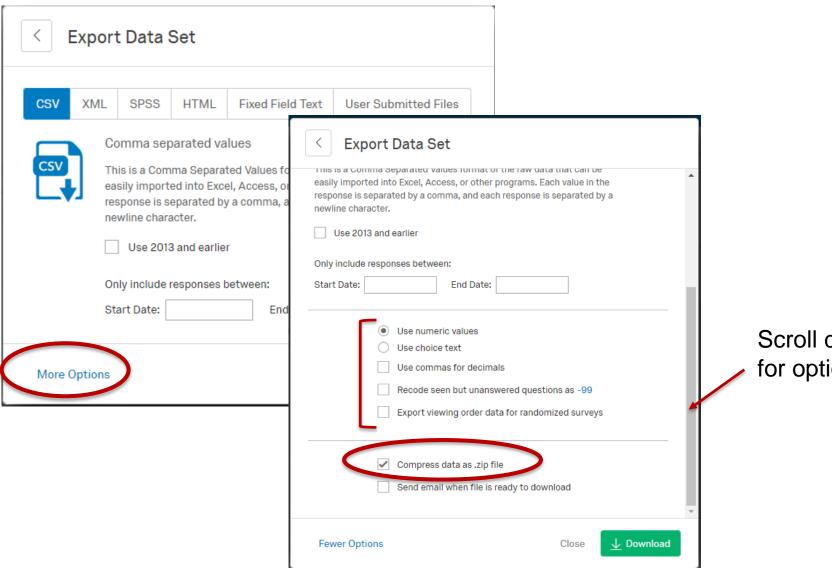
Export Complete Data Set



Download all fields and responses for this project except for tags and custom columns. This export can be imported into Qualtrics.

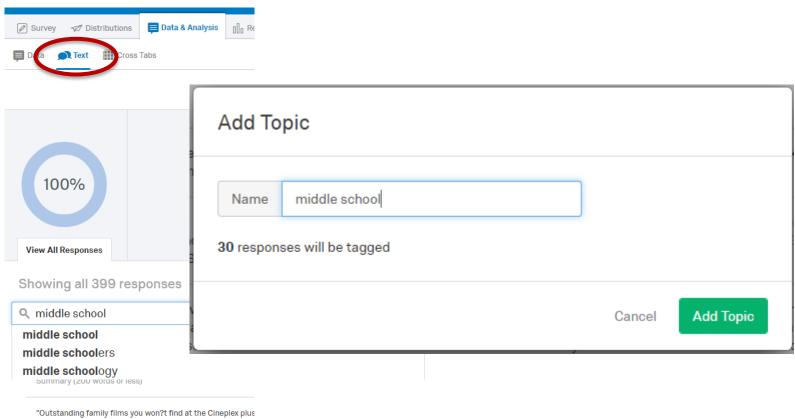
Close



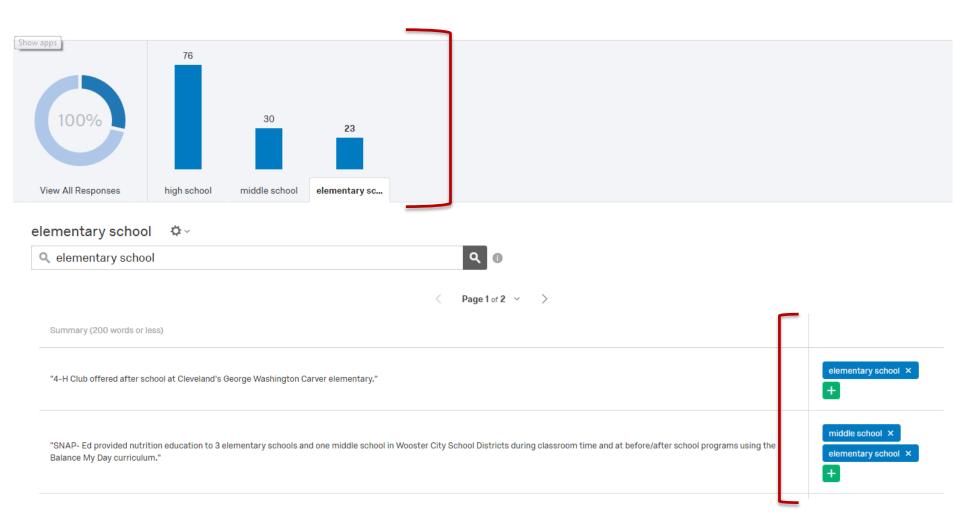


Scroll down for options

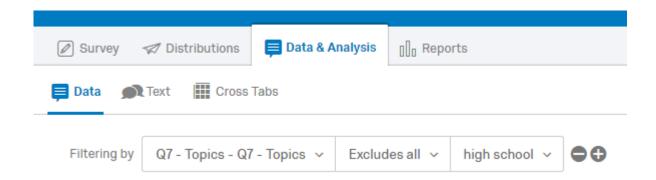
TEXT ANALYSIS



children from many cultures. Zoom is offered every year the t

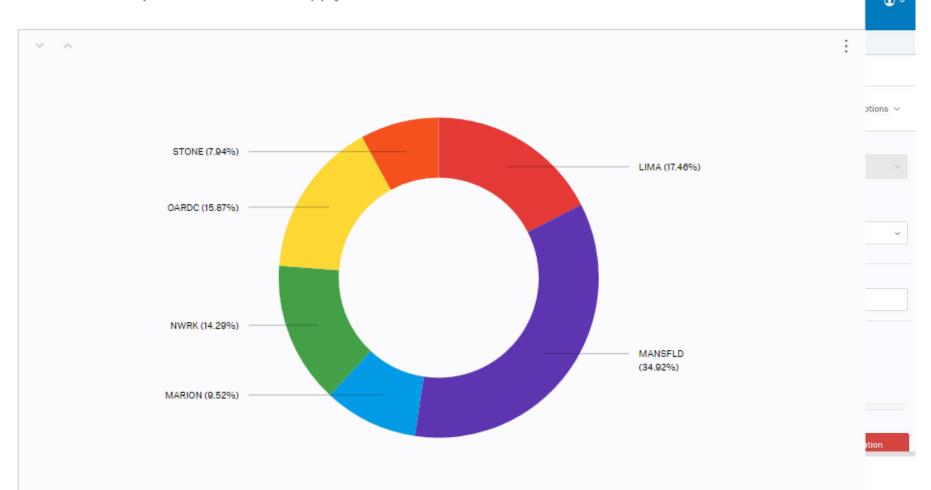


TOPICS CAN ALSO BE USED IN FILTERING DATA

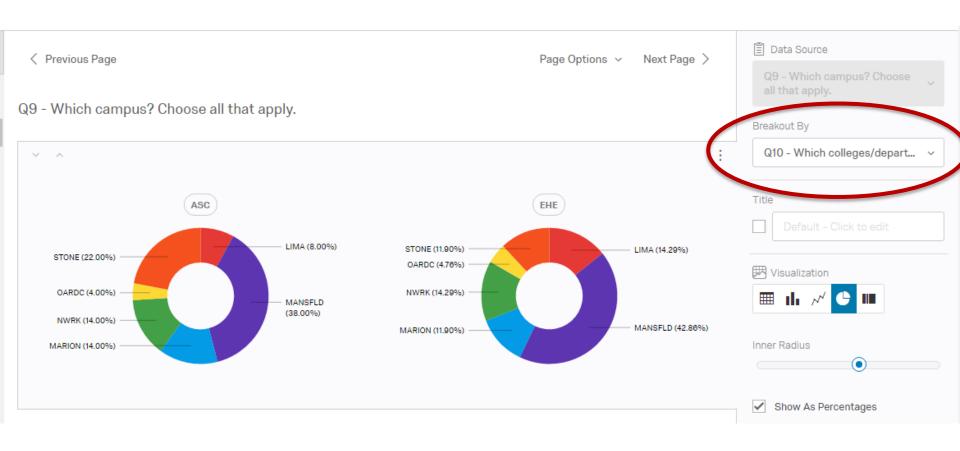


REPORTING

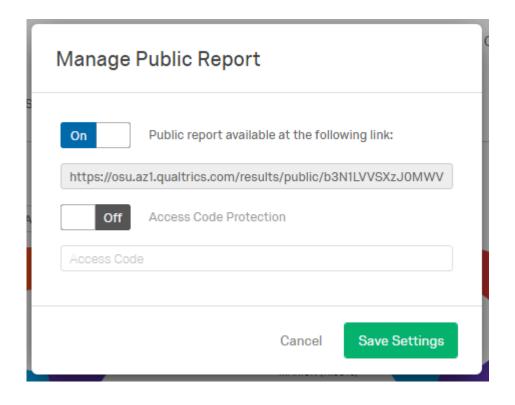
Q9 - Which campus? Choose all that apply.



FILTER REPORT FURTHER USING "BREAKOUT BY" FEATURE



CREATE PUBLIC REPORTS



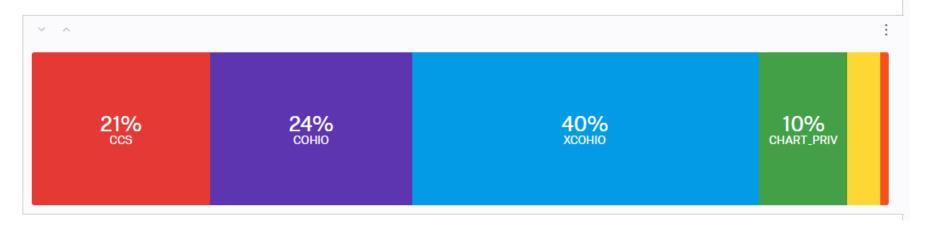
REPORTS CAN BE PUBLISHED VIA A LINK

EITHER PUBLIC
OR ACCESS CODE PROTECTED

EVEN IF YOU EXPORT DATA FOR ANALYSIS IN SAS, SPSS, ETC.

QUALTRICS REPORTING TOOLS CAN BE USED TO QUICKLY SPOT INTERESTING TRENDS (WHAT QUALTRICS CALLS INSIGHTS)





Qualtrics Customer Service (800) 340-9134

Questions? Time for exploring