Qualtrics: The Basics

Video 4 – Activating and Distributing the Survey – 6:06 minutes

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00:00 How to Activate a Survey

Activating the survey is easy. Just click the meatballs menu on the right-hand side of the survey and select "Activate." The survey is active, but you have not sent it to anyone without setting up a contact list first.

00:42 Distributing a Survey – Anonymous Links

Open the survey and go to the Distributions tab. You will see a screen with many options for distribution – Email, Web, Social, Mobile, and Online Panel. Select Email and "Get a single reusable link." This will automatically create an anonymous link to the survey. You can give this to anyone who you want to invite to participate, but you do not have a lot of control over who uses the link. It can be shared and used by anyone who has it and you do not know who is on the other side of the survey.

01:40 Distributing a Survey – Qualtrics Mailer

To use the Qualtrics Mailer, you first need to upload your contacts. In the top right corner of the screen, click Contacts and then the green button labeled "Create Contact List." A white window will open. Name the list and select which folder it will be saved in. Next, you can import the list of contacts from a file, manually enter the participants' information, or import the contact list from another survey. If you are surveying a large population, it is recommended that you import the contact list from a file or another survey.

Some file requirements are listed on the right side of the window. Qualtrics has an example document that shows the basic template. The contact list must contain a column labeled Email, but all other columns are optional. We recommend including First Name, Last Name, and External Data Reference. An external data reference is basically an ID, like a CWID. The contact list must be a .csv file. Once this file is uploaded, it is saved as a contact list that you can reuse in future surveys.

03:50 Using the Qualtrics Mailer

From the Distribution tab within the survey, click Emails on the left-hand side of the window and then the green button labeled "Compose Email." This will open a window where you can compose an email to the participants. There are many customization options.

In the "To" field, select the contact list that will receive the email.

In the “From” field, there are three spaces to edit. The From Address can only be edited prior to the @ symbol; for example, it reads noreply@qemailserver.com. The “noreply” portion can be edited, but not “@qemailserver.com.” You can also edit the “From Name” and the “Reply-To Email.”

You can schedule when the email is sent, but keep in mind that the time is in Mountain Standard Time.

You can also customize the subject line and the email’s body text. By default, the body auto-fills with code that is necessary to pipe in the participant’s unique link. It is important to leave this portion of the text intact.

After editing how the email will appear, you can send yourself a preview of the email to check if everything looks right. Once you are finished, click “Schedule Email” to save. You can edit the email after it has been scheduled.

After the first email has been created, you can also schedule reminder emails that only go out to those participants in the contact list who have not completed the survey yet.