# Qualtrics Survey Distribution

Qualtrics allows you two different ways to distribute a survey: anonymously and non-anonymously by using a predefined list of recipients to be emailed.

In either case, you must first ensure your survey is **Activate** your survey. You can do this from several places, one of which is directly from the **Projects** landing page, and then clicking on the drop-down menu to the far right of your survey name and selecting **Activate**:
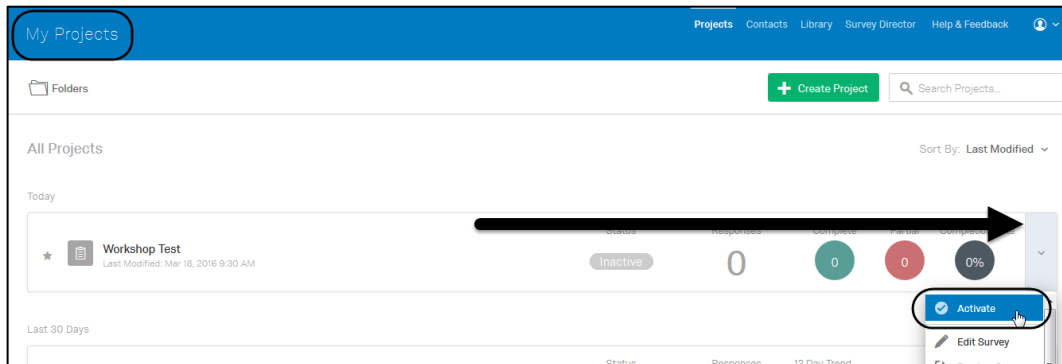

Here are some points to keep in mind with each type of survey:

Anonymous Survey	Non-Anonymous Survey
Easy to give the link to anyone via email, social media, and/or posted on the web.	Must create a Contact List of recipients. You can either type in the email addresses within Qualtrics itself or upload a .csv file that can be created from any *Excel* file. (Qualtrics provides a template for the .csv file.)
People can easily forward the link to someone else	Anyone taking the survey must be listed on your Contact List, as each person receives a *unique* URL
Unless the survey-taker is using the same computer and the same browser, if s/he pauses in the middle of the survey, s/he will have to re-start from the beginning. (Qualtrics will store a "cookie" on the browser, so it must be on the same computer using the same browser to pick up where left off.)	Qualtrics will always "remember" where the user last left the survey at one of its save points. (In a Qualtrics survey, the survey is saved by advancing to the next page.)
In theory, the same person can re-take the survey multiple times, especially if logging in from a different computer and/or using a different browser. (Qualtrics can use a browser "cookie" to prevent a survey from being re-taken, but that only works if the user is on the same computer and using the same browser.)	A survey can only be taken **once**.

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Double-Check Your Survey Options

Click on the name of your survey, and from the Survey tab select **Survey Options**:
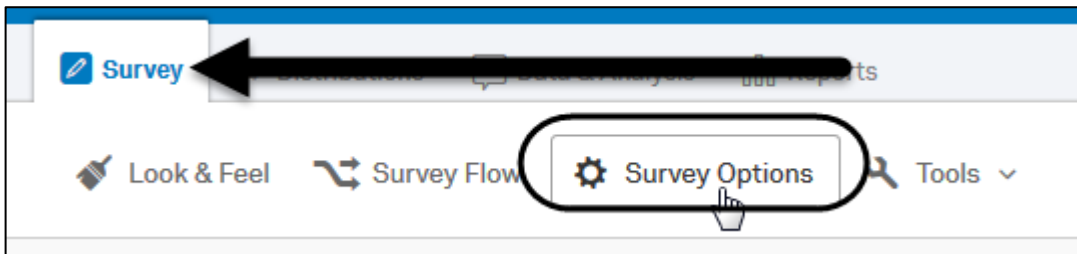
This will lead to a screen with several options available (more than what is shown below), some of which will come into play depending on your ultimate choice of whether you are doing an anonymous or non-anonymous survey:

A few things to bear in mind:

- **Open Access** will have to be enabled if you plan on doing an anonymous survey. Do not worry that they say "anyone" can take the survey. That really means "anyone" who has the link!
- **Prevent Ballot Box Stuffing** is especially useful for anonymous surveys. It will place a browser "cookie" on a user's browser to prevent them from re-taking the survey. However, this can backfire on a shared device, since the "cookie" will be saved regardless of the user. (Plus, a savvy user can simply go to a different computer or use a different web browser to submit an additional survey or two.)
- **Anonymize Response** is only necessary if you are using a Panel for an email to announce the survey, and is generally **not** recommended unless you truly want all responses to be anonymous and not record any information about the individuals who responded. This is **not** "un-doable" if you have a change of heart later.

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Anonymous Survey

This is the easiest to set up, since all you need is a link. You can either click **Activate** from the screen shown at the top of this handout or click the **Distributions** tab while editing the survey. (See our other handout, ***Creating a Qualtrics Survey***, for additional information.) *Qualtrics* will give you a URL to copy-and-paste into an email message or use elsewhere.

Non-Anonymous Survey

Does a Non-Anonymous Survey Mean I Can See Which Individual Respondent Said What?

Basically, yes. The **View Results** tab *does* allow that, as it will display a list of who responded to your survey as well as clickable links to view individual responses. As explained above, there is an option using the **Survey Options** feature to **Anonymize Responses**, but that's not recommended because it is NOT reversible. Still, if you truly want to use the contact list method outlined below to send out emails with unique links to each survey-taker, you *can* make the survey responses anonymous.

Creating a non-anonymous survey requires creating what Qualtrics calls a **Contact List** of recipients. (This has historically been called a "panel" in the past, so don't be surprised if you see mention of a Panel in some of their online help.) First, you must create a contact list by clicking on the **Contacts** link at the top of any *Qualtrics* screen, and then the **Create Contact List** button:

You will then be asked to give the new Contact List a unique **Name** and (optionally) a **Folder** where you want to store it on the Qualtrics server. After doing so, you will reach a very important screen regarding how you want to add in names and email addresses to your contact list:

The first tab, **Import From a File** will be the one used most often and is covered below.

On the other hand, if you are *absolutely* allergic to using *Excel* you can indeed opt to select **Add Manually**, which will result in a screen like this:
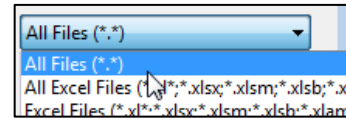

Trust us, though, you *really* want to **Import From a File**. (Even if you're allergic to *Excel*—which is a curable allergy.)

Import from a File

If this is your first time doing this, it is not a bad idea to click the **Example Document** link shown on the right side of the first screen capture on this page to download a sample CSV file:
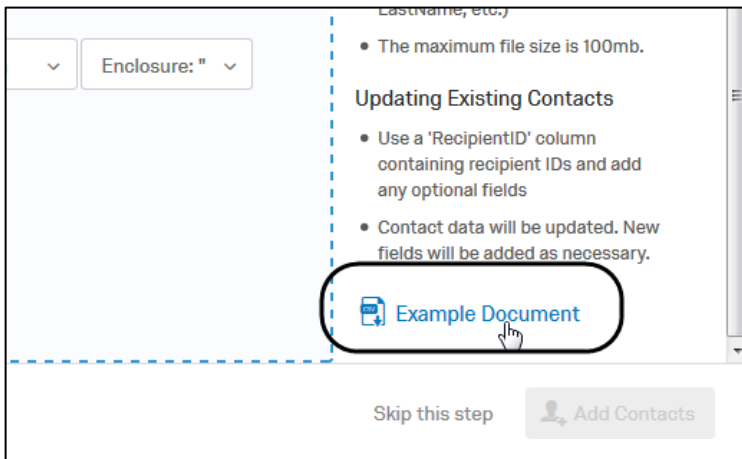
The sample file is already in the .csv format and will look like this when opened in *Excel*:

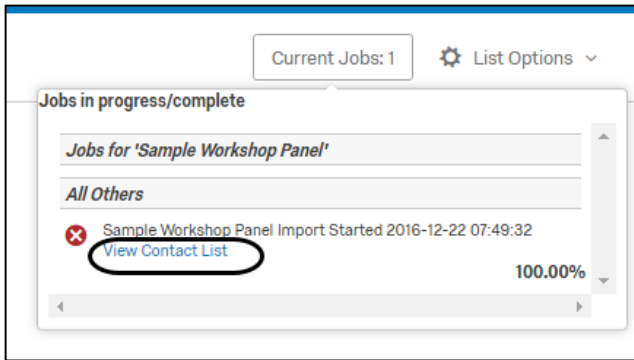|	A	B	C	D	E	F	G
1	FirstName	LastName	PrimaryEmail	ExternalDataReference	EmbeddedDataA	EmbeddedDataB	
2	John	Doe	John_Doe@email.com				
3							
4							

Keep the first row for column headings. Technically, *only* the PrimaryEmail column is *required*. The others (even the names) are optional, though you should use the names if you plan to generate a personalized email message, as described below. The **ExternalDataReference** column is primarily used for ID numbers; it is meant for any data that can be used as a reference point in another information system. The **EmbeddedData** columns are for possible items like job title, company name, etc., all of which could be used by you in a personalized email to the individuals or for your own records. When you save this spreadsheet, **be sure to save in the .CSV format and *not* as an Excel file!**

Your next step after creating a panel is to upload it. You can either **Browse** to the file as shown in the screen capture at the top of page 4, or—if you first downloaded the sample and saved your own CSV file—you can upload it from the **Contacts** area by clicking the drop-down arrow next to the name of the list you created and selecting **Import List**:
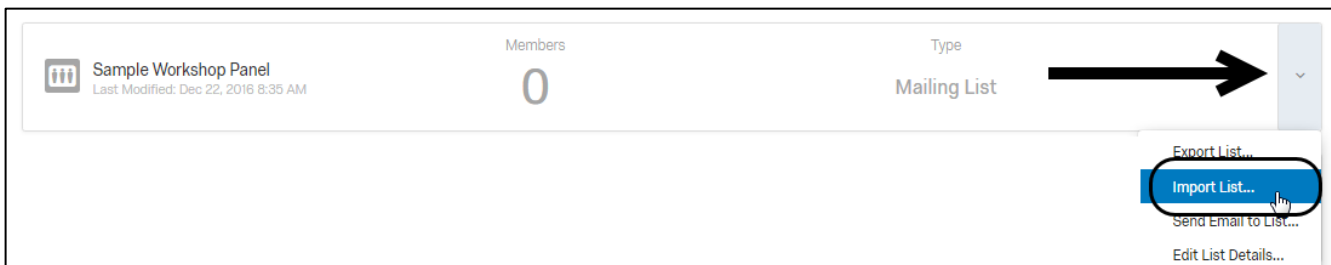
The above will bring you back to the screen shown at the top of page 4, where you can click the **Browse** button and upload it.

After doing so, just click the **Add Contacts** button that you will see on the dialog box. After a few seconds, you will see *Qualtrics* display a "progress" dialog box such as the one shown below:
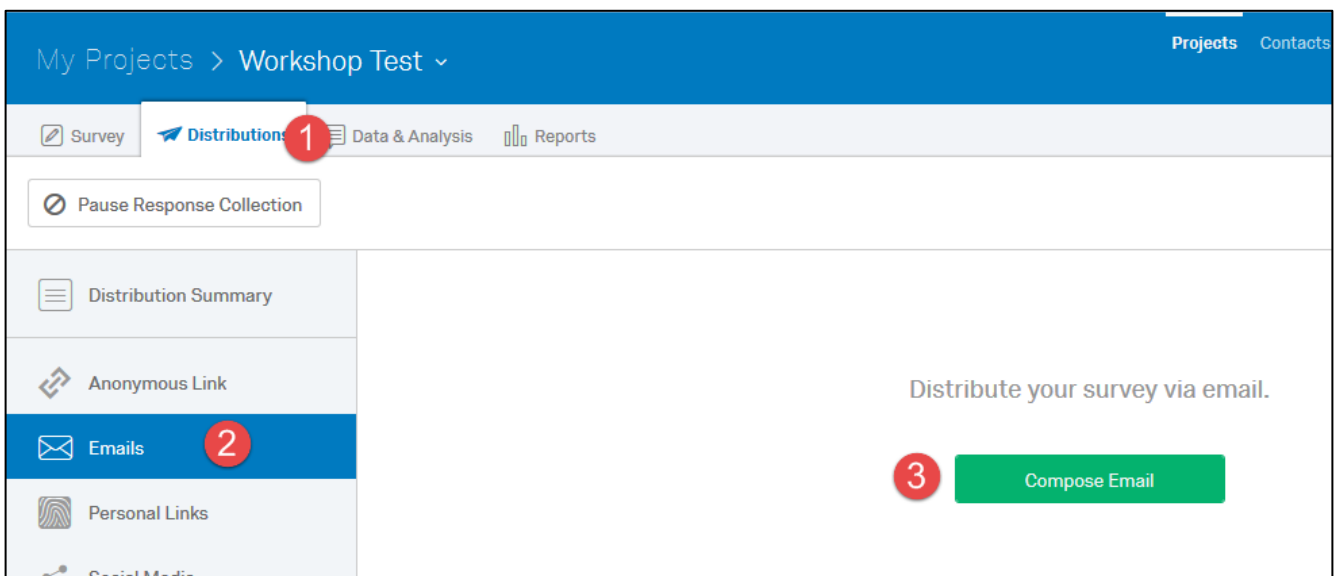
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You can, of course, click **View Contact List** (circled above) to ensure that the list was imported properly:

| Opted In	First Name	Last Name	Email
✓	Bruce	Wayne	bwayne@wayneenterprises.com
✓	Darth	Vadar	dvadar@empire.gov
✓	Luke	Skywalker	lskywalker@rebelbase.org
✓	Harry	Potter	hpotter@hogwarts.edu
✓	Leia	Organa	lorgana@rebelbase.org

Sending an Email to Announce a Survey

Now that you have a Contact List for your survey, you are ready to compose an email (with a link) announcing it. This link will be a *uniquely-generated* link for each recipient.

Load up your survey from the **Projects** link if it is not already, and from the **Distributions** tab click **Emails** and finally **Compose Email:**

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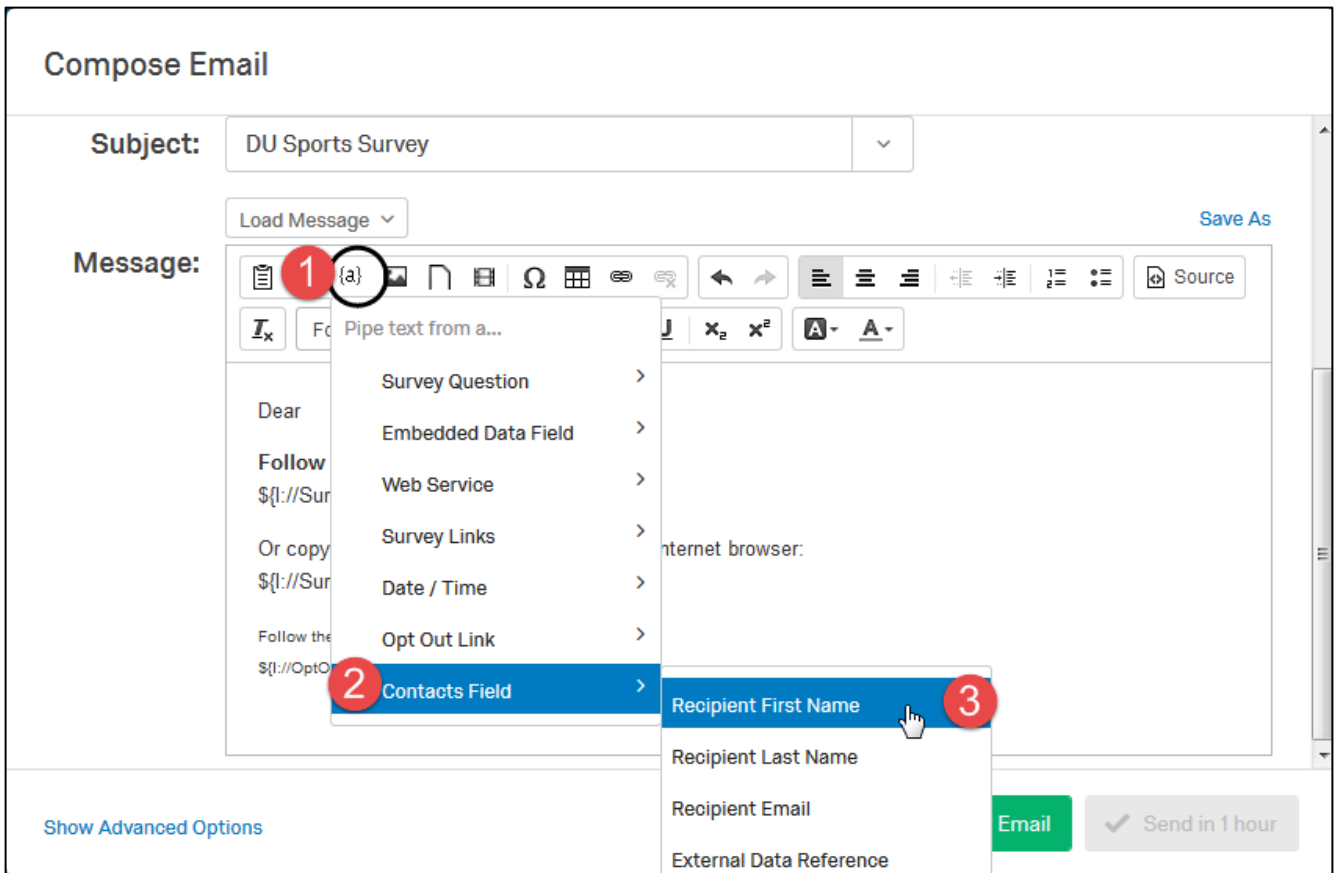
Next, you will see a screen to start writing the email, but you first want to click on the **Select Contacts** list next to the **To:** field.   From the **Select Contacts** drop-down menu, head to **My Library**, find your survey name, and finally click **Select Entire Contact List**:
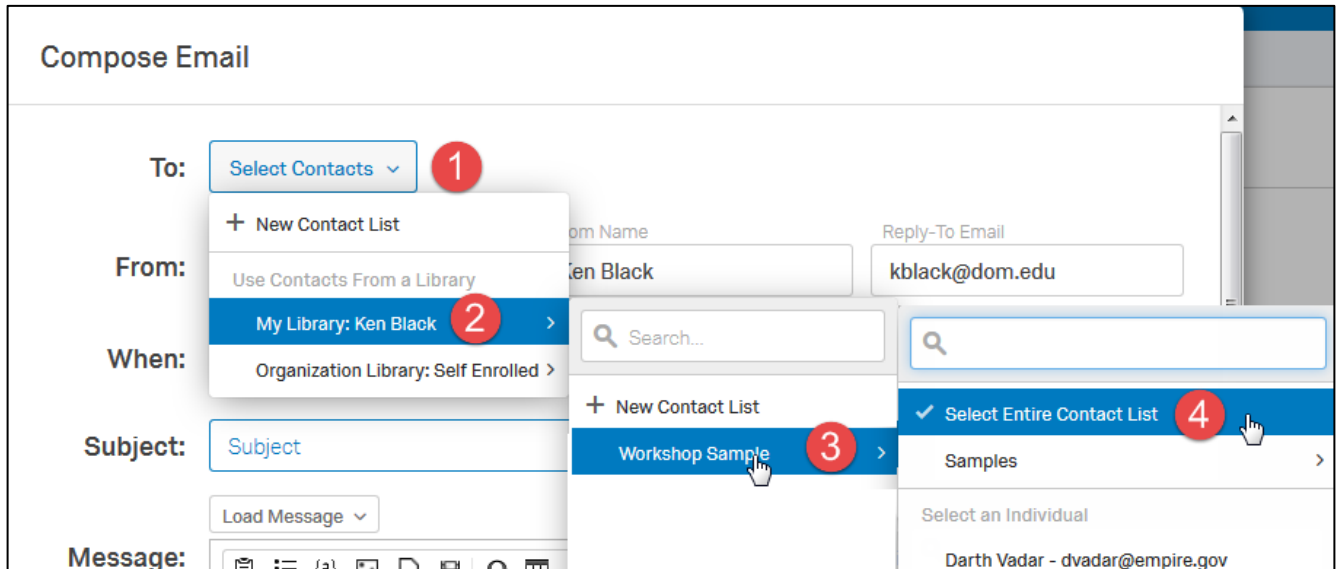
Next, select **When** you want the email to be sent out. There is a drop-down menu of standard choices. And, of course, type in a **Subject.**

Finally, in text editor for the email message itself, **do not** alter any of the information already given to you, as that is where the personal links will be generated. However, you are welcome to add whatever you like **above** that information. In fact, you can even **personalize** some of the message, assuming the fields to be used were input within the contact list information. You can do this by clicking the "piped text" icon in the text editor (see circled area in screen capture below) and selecting the field you wish to input from your Panel. This makes the capability very similar to a mail merge done in *Word*:

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Here is a sample of an email that contains such text:

In case you are a bit concerned over what the final product will look like, Qualtrics has thoughtfully provided the ability to send a test message, courtesy of the **Send Preview Email** button at the bottom.

Unfortunately, any *piped text* will not work on this test email, since the test email is not using your contact list. Additionally, there is a **Show Advanced Options** link that you should check out. For example, one of the advanced options is to set a time for the survey link to **expire**, which is handy if you forget to de-activate the survey on your own.

View Responses

There are many options for this, which you can consult Qualtrics help about, but the simplest way to do a quick review of survey responses is by clicking on your survey name from the **Projects** page, and then clicking the **Reports** tab, where you will immediately see a question-by-question summary of responses.

Using the **Report Options** drop-down menu, there is the ability to **export** a report to *Word*, a PDF, or a CSV file. You can also make a report "public" by placing it on the web, complete with the ability to password protect it so that it is (somewhat) private.

More options, however, are available under the **Printed Report** area. To get a printed report, to the **Reports** tab, again assuming you have your survey open. From there, click on **Printed Reports** and then **Create New Report:**
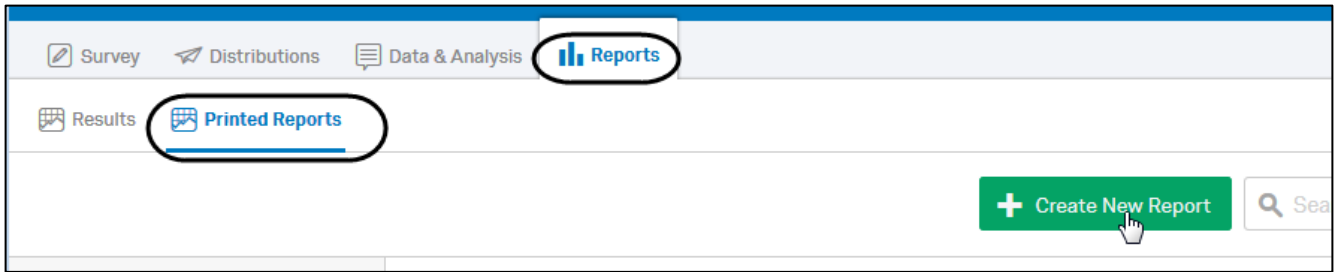
You will next arrive on a screen where you can select how detailed a report you want, and even the ability to exclude some questions:
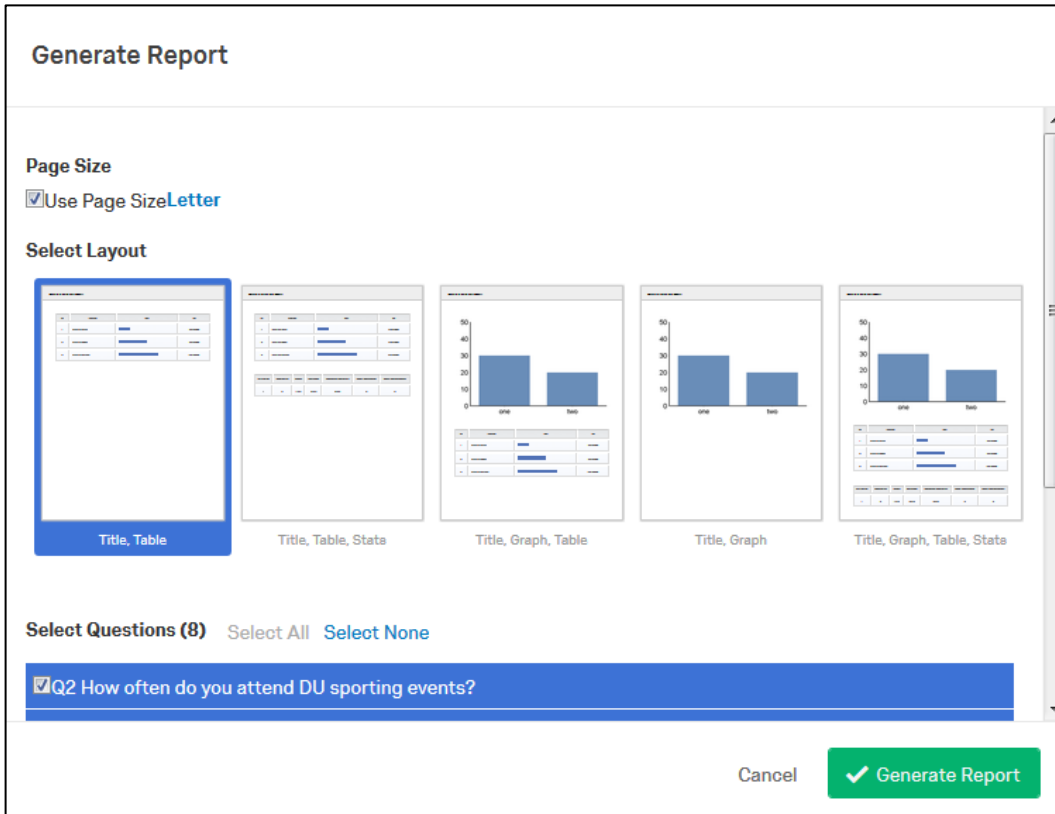
After the report is generated by clicking **Generate Report**, there are additional options from the **Report Options** button:
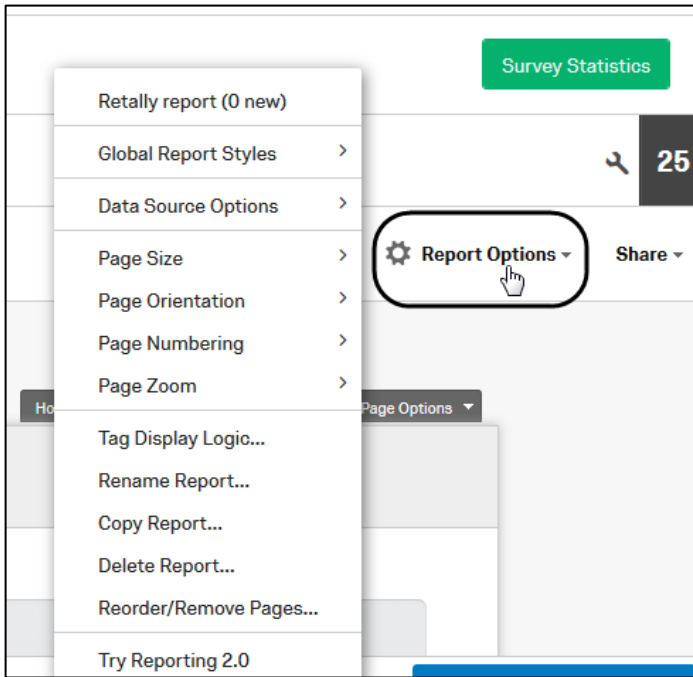
Finally, the **Share** drop-down menu right next to that allows you to export to a variety of programs, or even publish it to the web:
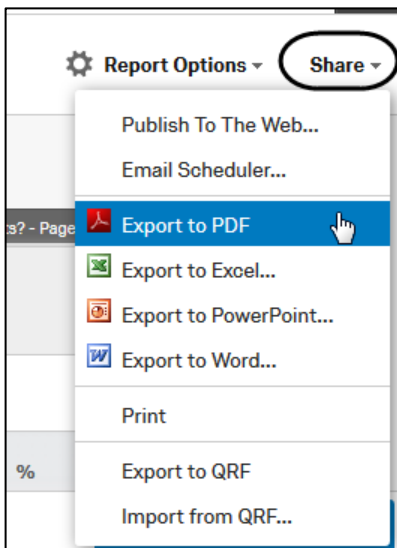
If you are interested in doing **cross tabulations** for data comparison (such as isolating specific demographic data comparing gender to other factors) that feature is available under the **Data Analysis** tab:

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