

# Advanced Uses of Qualtrics: from Automated Forms to Interactive Exams

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California Association for Institutional Research  
CAIR Conference 2017 in Concord



LIFECHIROPRACTIC  
COLLEGE WEST

# LCCW At-A-GLANCE



## **private, not-for-profit**

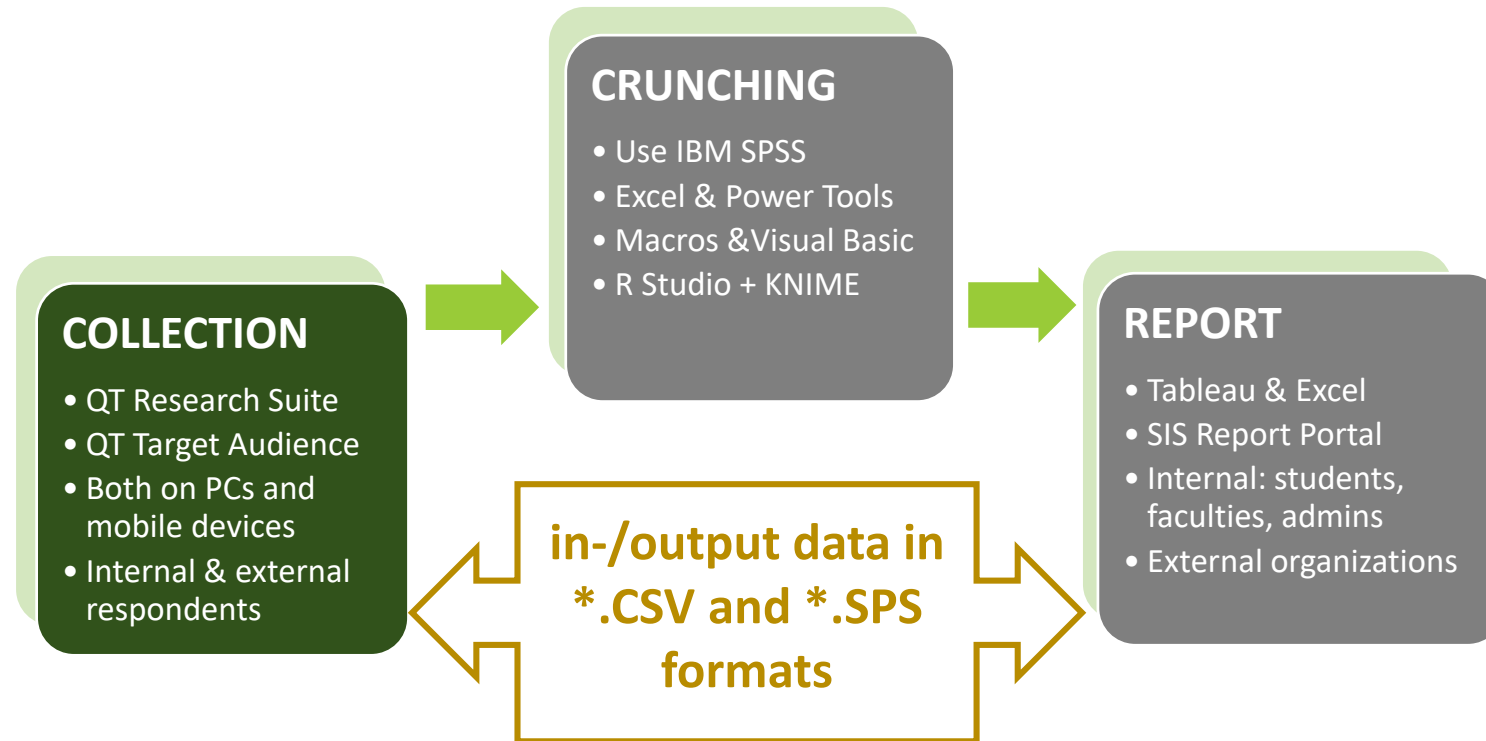
- accredited by CCE and WSCUC
- health professional college & health center
- serving patients in Hayward and the Bay Area
- offering one professional health program: Doctor of Chiropractic



## **dynamic and growing**

- average enrollment: about 650
- one of the fastest growing chiropractic colleges in the U.S.
- successful rugby men team & newly formed women team
- investment in Health Center renovation, new assembly hall

# LCCW'S IR DEPARTMENT

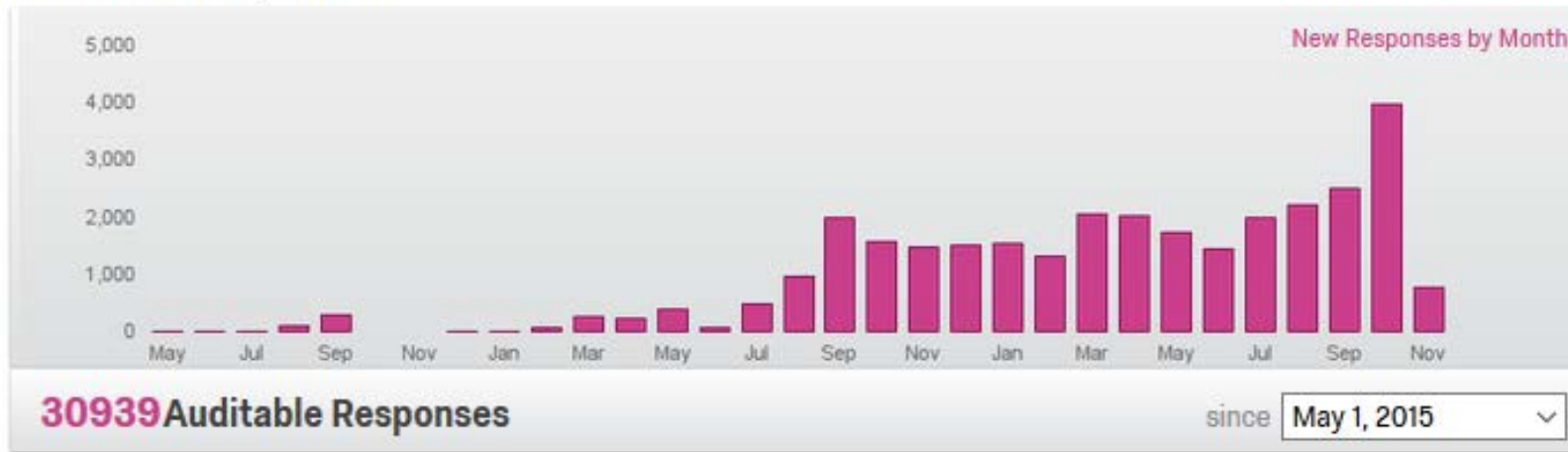


## Qualtrics Uses

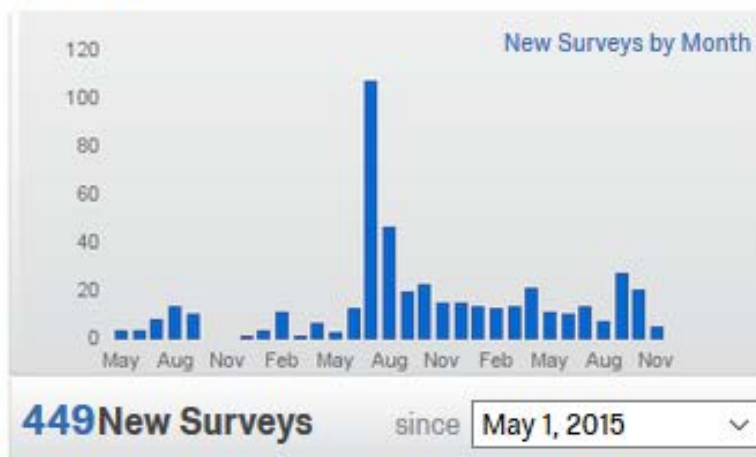
- Surveys – of course
  - Event/Service Satisfaction
  - Graduation exit
  - Alumni engagement
  - ...
- E-forms: request, feedback
- Interactive Exams
- Intern Assessment
- Course/Instructor Evaluation

# QUALTRICS USES AT LCCW

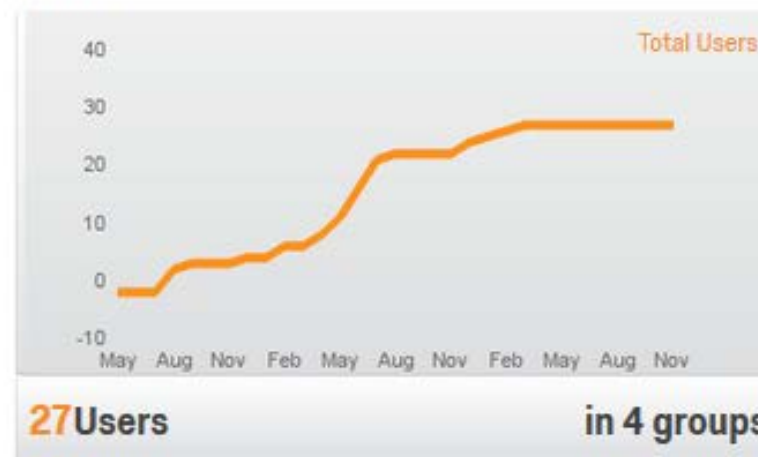
## Auditable Responses <sup>i</sup>



## Surveys



## Users





## Agenda

- Advanced Uses: What, When, and Why?
- E-forms: Using Scheduled Report
- Interactive Exams
  - “Single Sign-on”
  - **Embedded data & re-run flow**
- E-Forms: Using Email Triggers
- Passing embedded field to other surveys
- Math operations & Logics

# “Advanced Uses” -- Really?



## Qualtrics Common Uses

- Research Suite: create/edit/distribute surveys and generate reports
- Target Audience: manage contacts, their scores, distribute surveys

## Why “advanced uses”?

- Hidden features
- Combinations of some features that have special uses
- Interactive experience
  - with appropriate settings
  - on mobile devices

## When to use?

- Testing out-of-the-box solutions
- Improve current data collection process
- Enhance user experience

## Advantages

- Web-based application: flexible & fast
- Able to control the entire data collection
  - security & confidentiality
  - quality and consistency
- Low or no additional budget

# Automated Forms

digitized paper forms that automatically send information to assigned emails  
e-form = **QT survey** + scheduled report



# Automated Forms – How to set up?

digitized paper forms that automatically send information to assigned emails

**e-form = QT survey + scheduled report**



## Office of Academic Affairs Withdrawal Form

Your request for withdrawal will be reviewed by Academic Affairs. If there is no concern, Office of Academic Affairs will send you a confirmation per email that your request is approved. All fees owed refunds due will be processed after the approval.

**ATTENTION INTERNATIONAL STUDENTS:** Withdrawing will affect your Student Visa Status. You must contact the International Student Advisor before submitting this request.

The form is completed by:

Student	Office of Academic Affairs
---------	----------------------------

Student identification information:

Student ID	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>

International Student:

Yes	No
-----	----

Sample eForm

Survey Distributions Data & Analysis Reports

Look & Feel Survey Flow Survey Options Tools

Sample eForm

Default Question Block

Q9 Your request for withdrawal will be reviewed by Academic Affairs. If there is no concern, Office of Academic Affairs will send you a confirmation per email that your request is approved. All fees refunds due will be processed after the approval.

**ATTENTION INTERNATIONAL STUDENTS:** Withdrawing will affect your Student Visa Status. You must contact the International Student Advisor before submitting this request.

Q1 The form is completed by:

Student	Office of Academic Affairs
---------	----------------------------

Q3 Student identification information:

Student ID	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>

Projects Contacts Library Admin Help

Share Report

- PDF Document
- Word Document
- PowerPoint Slides
- CSV (Comma Separated)
- Export Raw Data
- Download Previous Exports...
- Manage Public Report...
- Schedule Report Email...**



# Automated Forms: **Set up Using Scheduled Report**

Schedule Report Email

New Report\*

+ Add Scheduled Report

**To:**

**From:**

**When:**    
Next Run:

**Subject:**

**Attachment:**

**Message:**  [Save As](#)

Hi <Contact Person>,  
Please process the withdrawal request from <Student Name>

**Sample E-form  
(Withdrawal Request)**

# Sample IR Data Request

## IR DATA REQUEST FORM

### Basic Information

Date Needed \*

Name \*

Email \*

Department \*

Phone Extension \*

### Data Collection

Data Required \*

*(Please give as much detail as possible. See questions below.)*

What is the purpose of the Data Request? \*

- Curriculum review/planning
- Accreditation purposes
- Grant request
- External agency
- Other

Other

Time Frame of data needed

*Identify the time period you want your report to cover. Do you want one semester, multiple semesters, multiple academic year(s), etc.?*

*Do you want census data (the 4th week of term) or do you want end of term data?*

Trends Needed

*Are you interested in trends, comparisons (semester to semester, year to year), or some other scenario? Specify which terms or years to include.*

*Data Specificity: Be specific for each type of data you are requesting (e.g. number of students completing a developmental course successfully - success must be defined, program names, course/section numbers, locations, etc.). The more details/examples you provide, the easier it is to understand your request.*

Data Report Desired

- Tables
- Graphs
- Lists
- Combo (specify)
- Narrative
- Other

# Automated Forms

digitized paper forms that automatically send information to assigned emails  
e-form = QT survey + scheduled report

## Use Cases

- IR Data Request Form
- Feedback Form
- Withdrawal Request Form
- ... be creative

# Automated Forms

digitized paper forms that automatically send information to assigned emails  
e-form = QT survey + scheduled report

## Use Cases

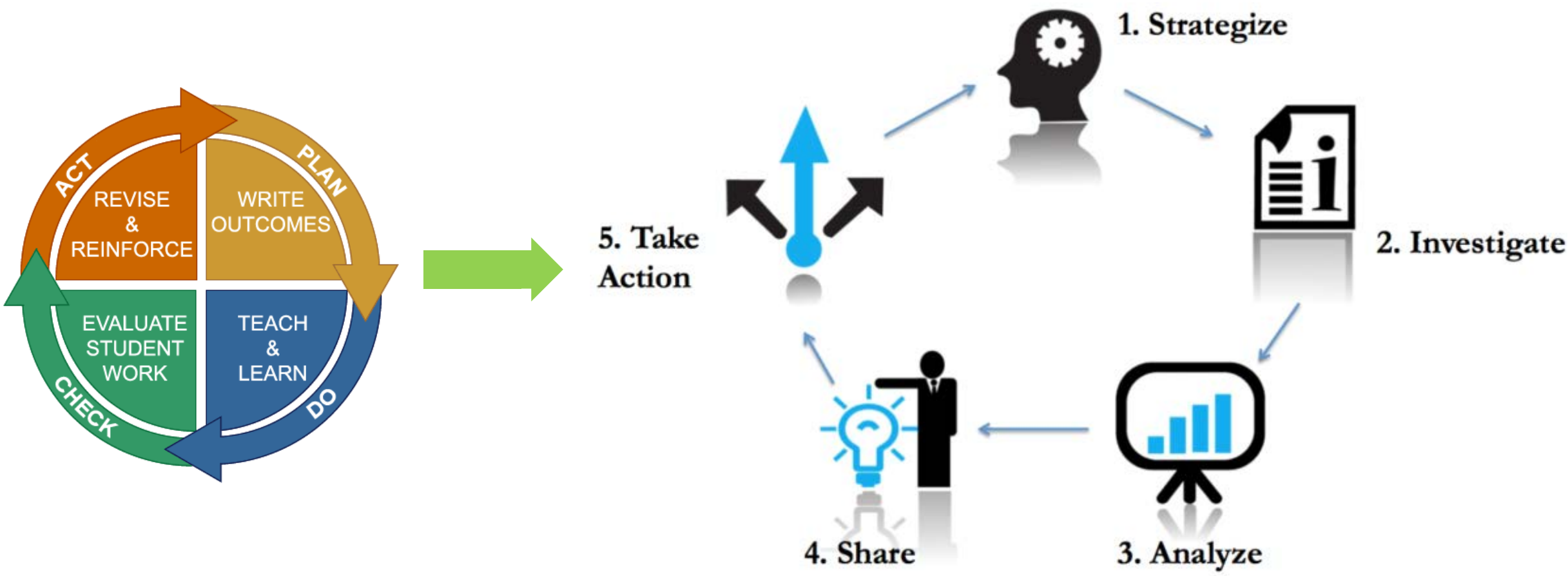
- IR Data Request Form
- Feedback Form
- Withdrawal Request Form
- ... be creative



## Key Considerations

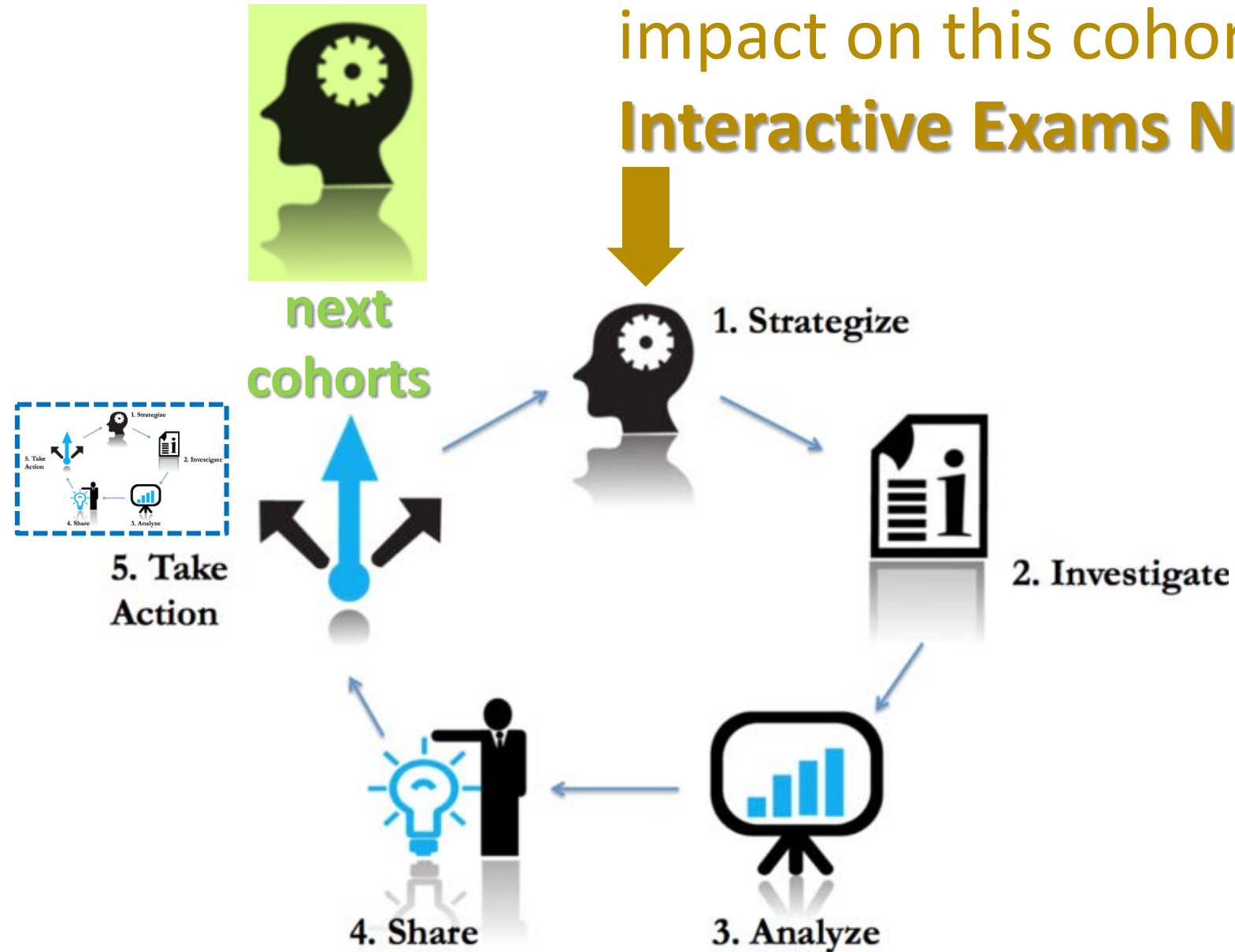
- Apply Display/Skip logics
- Scheduling: weekly/monthly (no daily schedule?)
- Separate contact persons

# From Generic to “Adaptive” Assessment Cycle



impact on this cohort?

**Interactive Exams Needed!**



# Interactive Exams

**digitized forms that automatically present information  
based on examinee or rater responses**

interactive exam = QT survey + pre-designed interactions

# Interactive Exams

digitized forms that present information based on examinee or rater responses

**i-exam = QT survey + pre-designed interactions**



UNIVERSITY  
1833  
SAMPLE EXAMINATION

Please log in using your account and password.

Please contact your admin at [examadmin@university1833.edu](mailto:examadmin@university1833.edu) in case you haven't received your account information per email.

User Name

Password

Next

Please select your station

Station01	Station04	Station07
Station02	Station05	Station08
Station03	Station06	Station09

- “Single Sign-on”
- Passing over embedded data\*
- Embedded data & re-run flow
- Math operations & Logics\*\*
- ... be creative



# Interactive Exams

## pre-designed interaction: “Single Sign-on”

### Use Cases

- Internal/department uses
- Multiple links to maintain
- Extra security layers
- ... be creative

**Internal Uses Only**


[Sample E-form](#)  
[Sample Examination](#)

.....

.....

....





Please log in using your IR account and password.

*Your user name is the same as your official email (before @university1833.edu).*

*Please contact us at [support@university1833.edu](mailto:support@university1833.edu) in case you haven't received your account information per email.*

IR User Name

IR Password

**Internal Uses Only**

[Sample E-form](#)  
[Sample Examination](#)

.....

.....

....

# Interactive Exams

pre-designed interaction: **“Single Sign-on”**

## On “Single Sign-on” survey

Survey Flow SAMPLE\_Single\_Signon 4CAIR

**Branch on Successful Authentication**

Authentication Type:

**Authenticate Using Contact**

**Authentication Fields**

Password  Prefill

Password  Prefill

## On each survey

Survey Flow Sample iExam

**Show Block: Default Question Block**

**Set Embedded Data:**

Value will be set from Panel or URL

[Add a New Field](#)

**Internal Uses Only**

[Sample E-form](#)  
[Sample Examination](#)

# Interactive Exams

digitized forms that present information based on examinee or rater responses

**i-exam = QT survey + pre-designed interactions**

UNIVERSITY  
U  
1833

**SAMPLE EXAMINATION**

Please log in using your account and password.

Please contact your admin at [examadmin@university1833.edu](mailto:examadmin@university1833.edu) in case you haven't received your account information per email.

User Name

Password

Please select your station

Station01 Station04 Station07

Please select a student name or "Manually Entered" if the student name is not listed.

Testing Student A (StudentID 99111)

Testing Student B (StudentID 99222)

Testing Student C (StudentID 99333)

Manually Entered

- “Single Sign-on”
- Passing over embedded data\*
- **Embedded data & re-run flow**
- Math operations & Logics\*\*
- ... be creative

# Interactive Exams

pre-designed interaction: **embedded data & re-run flow**

## Use Cases

- One-to-many relationship
- **1 rater per station vs. many students**
- Multiple run for the same flow
- User experience is important: timing, interactions, open-ended text, ...
- ... be creative

The screenshot shows a web interface for a 'SAMPLE EXAMINATION'. At the top is the University logo, featuring a large green 'U' with 'UNIVERSITY' above it and '1833' below it, flanked by yellow banners. Below the logo is the title 'SAMPLE EXAMINATION' in green. The interface includes a login section with the text 'Please log in using your account and password.' and a contact email 'examadmin@university1833.edu'. There are input fields for 'User Name' and 'Password'. Below the login section is a section titled 'Please select your station' containing a 3x3 grid of buttons labeled 'Station01' through 'Station09'. A thick orange border highlights the 'Station01' button, and a curved orange arrow points from it towards the right, indicating a re-run or selection flow.

UNIVERSITY  
1833

**SAMPLE EXAMINATION**

Please log in using your account and password.

Please contact your admin at [examadmin@university1833.edu](mailto:examadmin@university1833.edu) in case you haven't received your account information per email.

User Name

Password

Please select your station

Station01	Station04	Station07
Station02	Station05	Station08
Station03	Station06	Station09

# Interactive Exams

## pre-designed interaction: **embedded data & re-run flow**

Survey Flow Sample iExam2

**Branch on Successful Authentication**

Authentication Type: Contact

Authenticate Using Contact

My Library: Hao Le    zzzSAMPLE\_PANEL\_N3

Authentication Fields

External Data Reference: User Name     Password     Prefill    UN

User\_pw    Password     Password     Prefill    PW

This will attempt to automatically authenticate the recipient.

[Move](#)   [Duplicate](#)   [Options](#)

**Set Embedded Data:**

ExternalDataReference Text Set    Value will be set from Panel or URL.    [Set a Value Now](#)

User\_pw Text Set    =    \$(e://Field/User\_pw)

Rerun Text Set    Value will be set from Panel or URL.    [Set a Value Now](#)

Station Text Set    Value will be set from Panel or URL.    [Set a Value Now](#)

FIRST Text Set    =    \$(m://FirstName)

LAST Text Set    =    \$(m://LastName)

User\_name Text Set    =    \$(m://ExternalDataReference)

### Customize End Of Survey

- Override Survey Options
- Default end of survey message.
- Custom end of survey message...
- Redirect to single response report.
- Redirect to a URL ... `/(Field/User_name)&Rerun=1&Station=$(e://Field/Station)`
- Send additional thank you email from the library...
- Do not increment quota counts.

## Summary... be creative



### Qualtrics Advanced Uses

- Flexible & fast
- Interactive experience
  - with appropriate settings
  - **effective on mobile devices**
- Out-of-the-box solutions
- Improve data collection
- Data quality & security
- **Low or no additional budget**

## Demo

- E-forms: Withdrawal Request
- “Single Sign-on”
- **Interactive Exams**
- Automated Forms: Set up Using Email Triggers
- Passing embedded field to each survey
- Math operations & Logics





# THANK YOU!

## Demo Links

Sample E-form

[www.tinyurl.com/sample-eform](http://www.tinyurl.com/sample-eform)

Sample “Single Sign-on” Page

[www.tinyurl.com/sample-ssso](http://www.tinyurl.com/sample-ssso)

## Presenter Contact Information

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## Not Advanced Enough?

- Advanced Uses: What, When, and Why?
- E-forms: Using Scheduled Report
- Interactive Exams
  - “Single Sign-on”
  - Embedded data & re-run flow
- **E-Forms: Using Email Triggers**
- **Passing embedded field to other surveys**
- **Math operations & Logics**



# Automated Forms: Set up Using Email Triggers

e-form = QT survey + scheduled report

Sample eForm

Survey Distributions Data & Analysis Reports

Look & Feel Survey Flow Survey Options Tools

Auto-Number Questions...  
Search And Replace...  
Strip Formatting...  
Spell Check  
Test Survey...  
Check Survey Accessibility...  
**Triggers** > Email Triggers...  
Salesforce > Contact List Triggers...

Sample eForm

Default Question Block

Q9 Your request for withdrawal will be reviewed by Academic Affairs will send you a confirmation p refunds due will be processed after the approval

**ATTENTION INTERNATIONAL STUDENTS:** With contact the International Student Advisor before

Triggers

Send An Email On Survey Complete:

Question Select Question...  
Select Question...

To Email Search...

From Q9 Your request f...ncern, Office...

Reply Q1 The form is completed by:  
Q3 Student identification information:  
**Q8 International Student:**  
Q4 Attendance Information (mm/dd/yyyy):  
Q6 What term do you plan to return?  
Q5 Please select ...n for withdrawal:  
Q7 Please provide...s for withdrawal:

Hi <Contact F...>  
Please process the enclosed withdrawal request from <Student Name>....

When: Send immediately

Include Response Report   
Show Full Question Text

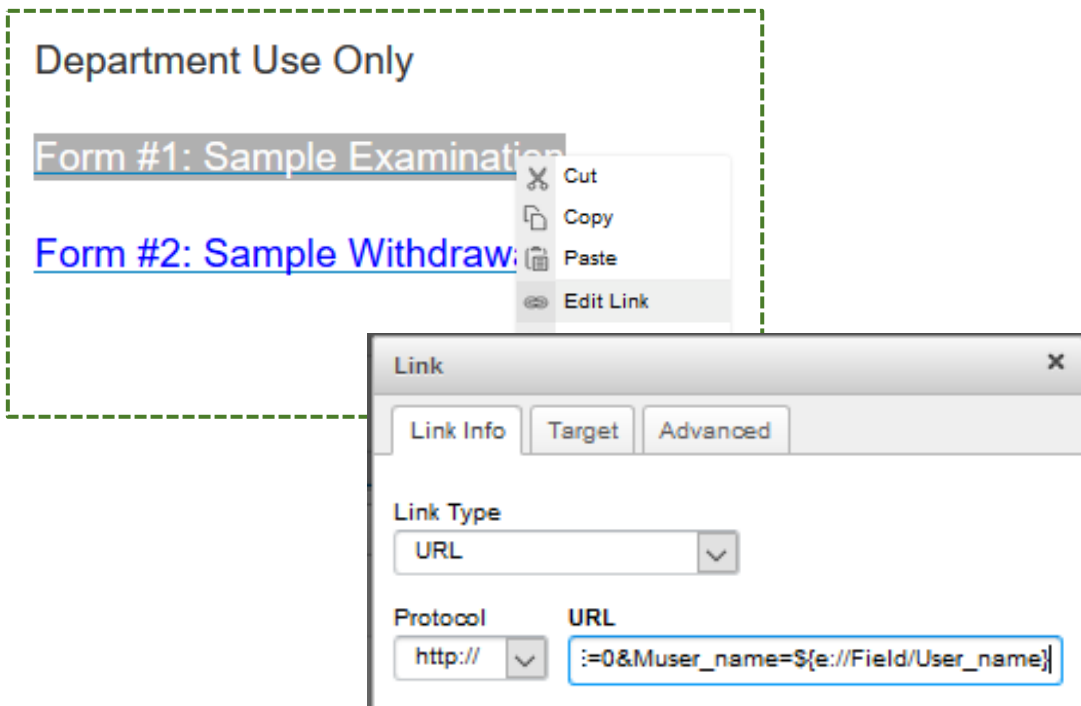
Close Without Saving

Save Triggers

# Interactive Exams\*

## Passing embedded field to other surveys

➔ On “Single Sign-on” survey



On each survey

- Get an “Anonymous Survey Link”
- Add the below text to the link  
**&User\_name=\${e://Field/User\_name}**  
(embedded field = “User\_name”)

# Interactive Exams\*\* : Math operations & Logics

## On Survey Editor

S01\_pct  
 Examiner Score:  $\$e{\text{round}(\frac{((q://QID31/\text{TotalSum} * 15 + q://QID32/\text{TotalSum} * 10 + q://QID33/\text{TotalSum} * 15 + q://QID34/\text{TotalSum} * 10) / 100) + 70}{1})}$   
 \*It is the weighted average of the station's 100 total points, which is used for checking pass/fail.

Display This Question:  
 If Is it an auto fail? If yes, you are required to provide comments below. **<span style="color: rgb(0, 128, 0);">NO</span></strong></span> Is Selected  
 And  
 If Sum1 Is Greater Than or Equal to 72  
 And Sum1 Is Less Than 75**

S01\_chanc  
 e2  
 Examiner Score is slightly less than the passing grade, 75 points. Do you believe is a "PASS"?  
 Yes, PASS  No

Display This Question:  
 If Is it an auto fail? If yes, you are required to provide comments below. **<span style="color: rgb(0, 128, 0);">NO</span></strong></span> Is Selected  
 And  
 If Sum1 Is Less Than 75**

S01\_fb  
 EXAMINER COMMENTS:  
 COMMENTS ARE REQUIRED IF EXAMINEE SCORE IS LESS THAN 75 POINTS. THIS IS THE ONLY VIABLE FEEDBACK THE STUDENT RECEIVES.

## On Survey Flow

Set Embedded Data:

Sum1 Text Set =  $\$e{\text{round}(\frac{((q://QID31/\text{TotalSum} * 15 + q://QID32/\text{TotalSum} * 10 + q://QID33/\text{TotalSum} * 15 + q://QID34/\text{TotalSum} * 10) / 100) + 70}{1})}$

[Add a New Field](#)

[Add Below](#) [Move](#) [Duplicate](#) [Add From Contacts](#) [Options](#) [Delete](#)

### Math Operations Syntax

All math operations are contained within the following syntax:

$\$e{\}$

The math equation will be inserted between **{** and **}**. All items in the equation should be separated by a space.

$\$e{4 + 4}$