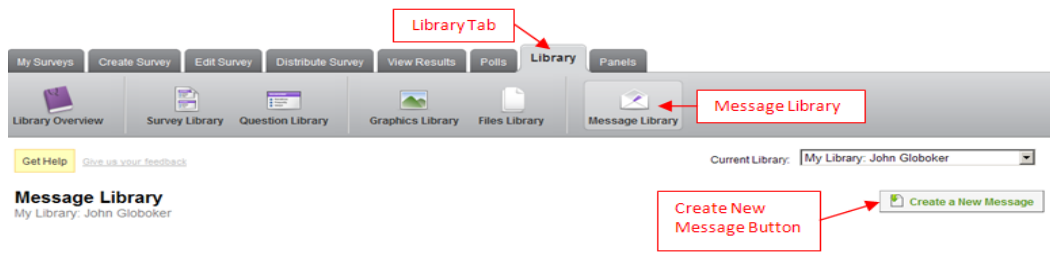
**Business Services Performance Feedback Survey – Walkthrough – (Qualtrics)**

1. Log on to the Qualtrics Survey tool using the following link and use your career account login and password to enter the application. [http://www.itap.purdue.edu/tlt/qualtrics](http://www.itap.purdue.edu/tlt/qualtrics)

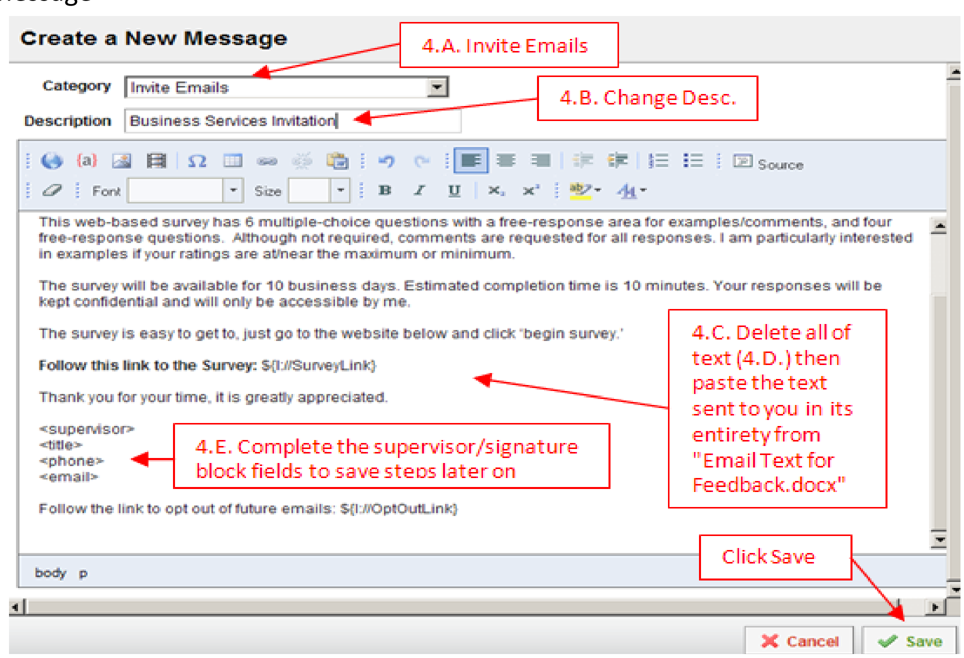
2. A survey has been copied to you, 'Business Services: Performance Feedback Survey (template revised)…'. This will be visible on the My Surveys tab which you will default to. You will need to copy this template for each Business Manager you will be reviewing.


   A. Click the Copy Button
   B. In the Survey name field enter 'Performance Feedback:' and the name of the business manager being reviewed
   C. Select the drop down "My Account or Group Account" option
   D. Click Copy
   E. This survey will now appear in your 'My Surveys' tab
   F. You will want to repeat this step for each of your business managers you are preparing the survey for

3. To facilitate the invitation process, the first step I'd like you to do is establish a message library for yourself. Click the 'Library' tab at the top of the screen and then click 'Message Library' then click the 'Create a New Message' button.
   **IF you established a message library last year, step 3 & 4 can be skipped.**




4. A pop-up will appear, titled 'Create New Message'

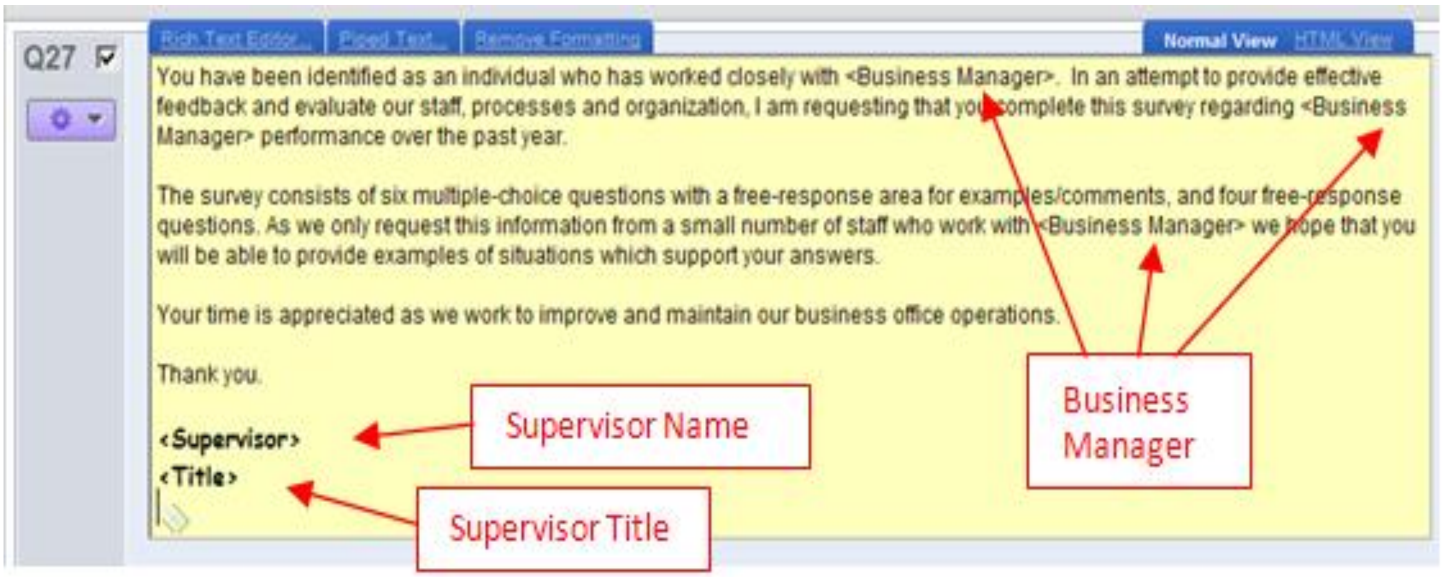



   A. Be sure the 'Category' drop down shows 'Invite Emails.'
   B. Enter 'Business Services Invitation' in the 'description' field.
   C. Delete all of the text within the document workspace.
   D. Open the file 'Email text for feedback.doc(x)' and copy the contents of the message, pasting it within the document workspace on the pop-up. (This file has been emailed to you or made available via a link with these instructions)
   E. Update the signature/name block information at the end of the message to save doing this for each BM.
   F. Click Save

5. Now to begin to modify the survey – click the 'My Surveys' tab, select the 'Performance Feedback: Business Manager' survey

6. You will go to the survey questions tab where you can edit the questions, layout, etc. I don't recommend you do this, but if you have a need, feel free to play around or contact me with questions about the process.

7. The first question is actually a 'welcome' paragraph to your respondent, within the text, the business manager name, supervisor name and title need to be updated. You can modify this text to suit your needs, but as the questions are addressed briefly, you may want to ensure that text is kept intact.



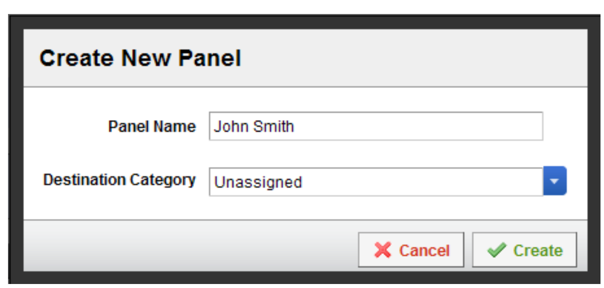

8. Select the 'Launch Survey' Button


9. Click the button, 'Activate your survey to collect responses'


10. You will be provided a survey link – however, the survey is set up so that only those who are emailed an invitation from Qualtrics can take the survey. To begin the setup for sending to respondents, click the 'Panels' tab.

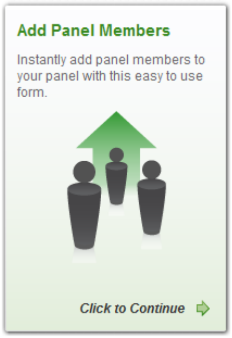

11. In the 'Panels' tab, select the button 'Create New Panel.'


12. You will see a pop-up – Name the panel, enter the name of the business manager you are reviewing in the 'Panel Name' field and the click the 'Create' button. (Ignore destination category). **You may already have a panel created from a previous year; you may instead edit this panel vs. creating a new panel utilizing the edit/delete options on the right side of the screen after you select the panel you wish to edit.**

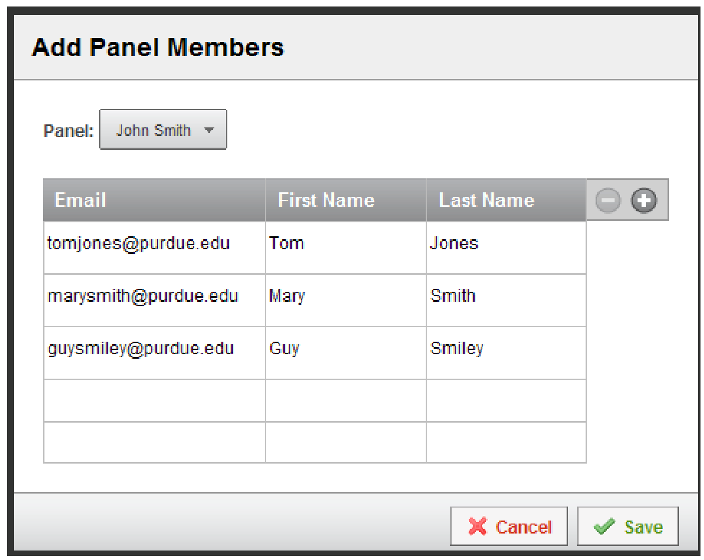


13. You will now be in the 'Panel Members' section of the 'Panels' tab. You can go between these two sections by clicking on the relevant icon button.


14. Within the 'Panel Members' tab, you will see the name of the panel in the 'Panel' field and you need to click on the 'Add New Panel Members' button.




15. You will receive a pop-up asking for emails and names of panel members… populate this with the relevant respondents for the business manager who feedback is being provided for. Then click the 'Save' button. Feel free to set-up this table in Excel and copy and paste into the blank request, allowing you to utilize it in future years.




16. You have now created a panel. If you would like, you can create all of your panels at once… effectively skipping steps 10-15 for any other positions that you have to complete performance reviews on. Simply click on the 'Panels' button at the top and repeat steps 11-15.

17. Once your panels are created, then you are ready to begin the process of sending out the emails to those panel members. To begin this process, click on the 'Distribute Survey' tab and click the 'Email Survey' Button.

18. To the right of 'To:' click on the 'Please Select…' button. Next, select 'My Library: your name'. Then, select the panel by selecting then name of the business manager you are reviewing. Finally, click 'Select Entire Panel'.

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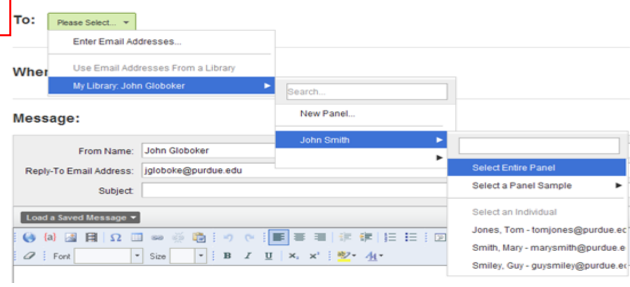


19. To the right of 'When:' click on the drop down arrow. Select when you want to send the survey. The default is in 1 hour, I see no problem with "Send Now".

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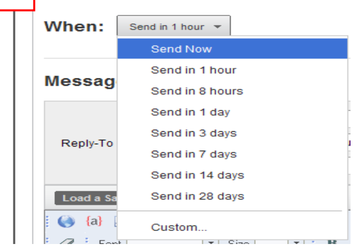


20. Under the 'Message' heading, ensure that it is coming from you and your email address, then change the subject line to ‘Performance Feedback Survey – Bus.Mgr. Name’ e.g. (Performance Feedback Survey – John Smith).

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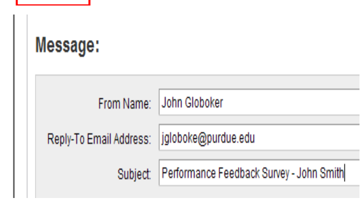


21. Click on 'Load a Saved Message'.
    A. Select 'My Library: your name' from the drop-down
    B. Select the ‘Business Services Invitation’ message

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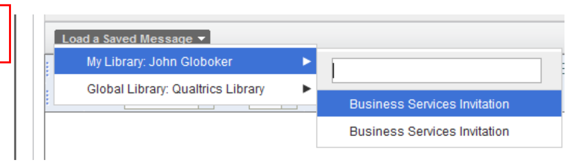


22. Within the text of the message from your library, make the following changes.
    A. Erase <Business Manager> and enter the name of the business manager being reviewed
    B. Erase <supervisor> and enter your name
    C. Erase <title> and enter your title
    D. Erase <phone> and enter your phone
    E. Erase <email> and enter your email

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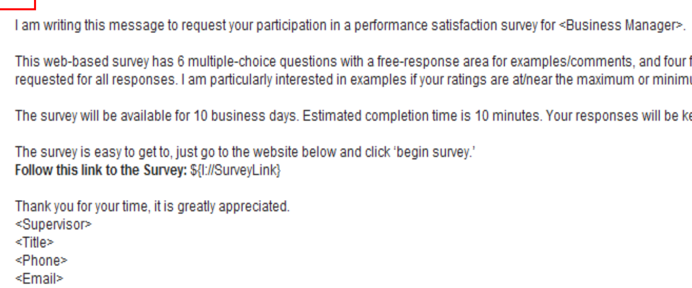
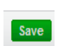

I am writing this message to request your participation in a performance satisfaction survey for <Business Manager>.

This web-based survey has 6 multiple-choice questions with a free-response area for examples/comments, and four f requested for all responses. I am particularly interested in examples if your ratings are at/near the maximum or minimu

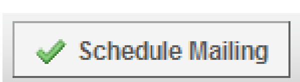
The survey will be available for 10 business days. Estimated completion time is 10 minutes. Your responses will be ke

The survey is easy to get to, just go to the website below and click 'begin survey.'
**Follow this link to the Survey:** ${l://SurveyLink}

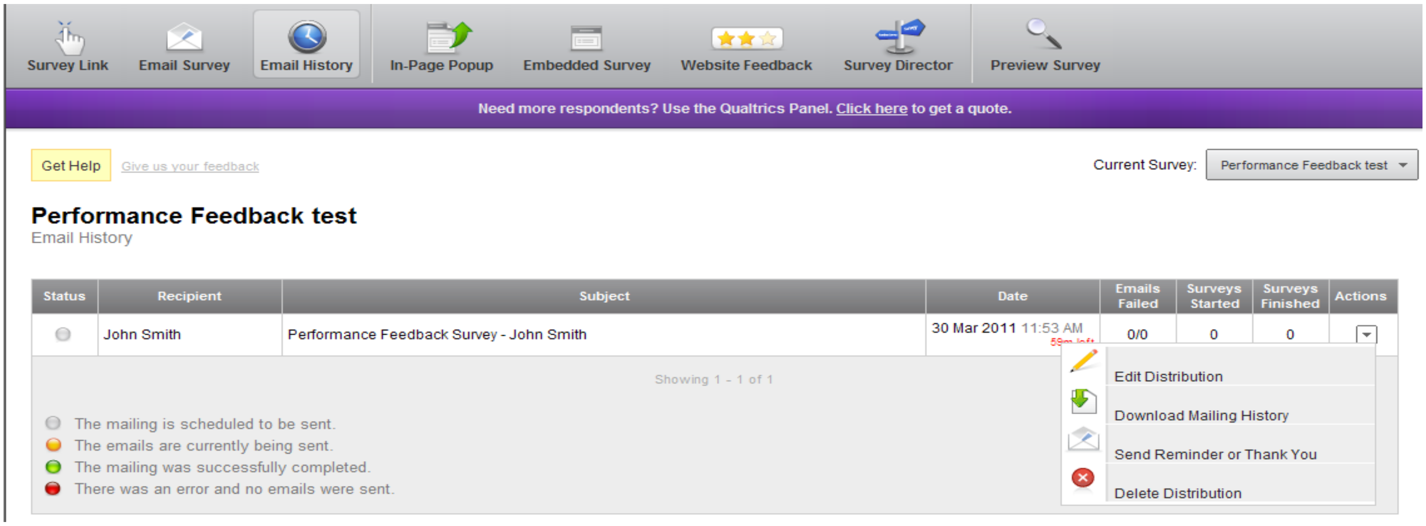
Thank you for your time, it is greatly appreciated.
<Supervisor>
<Title>
<Phone>
<Email>

23. Click Save 


24. Click the ‘Schedule Mailing’ button



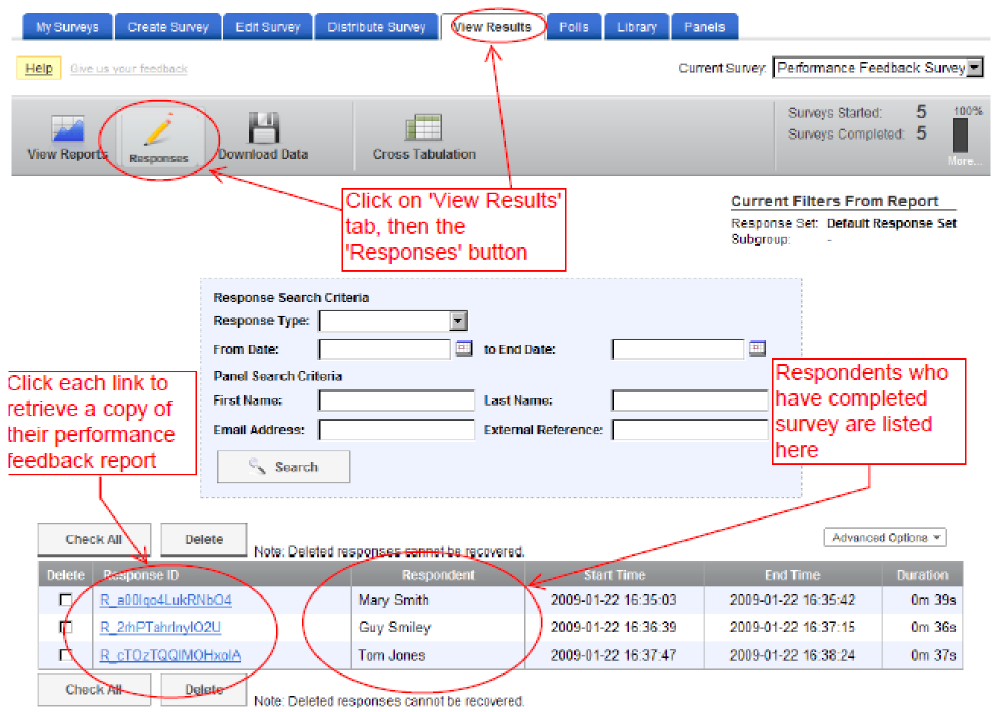
25. You have now successfully set-up and distributed your survey. You will be directed to the mail history section w/in the Distribute Survey tab. Here you can view the status of those emails and send follow-up or thank you emails should you choose under the 'Actions' drop down on the right.




26. It is now time to wait for people to respond to the survey…

27. Impatient? Would you like to know who has responded?

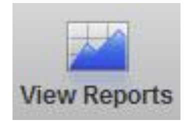
28. Click the View Results Tab, then the 'Responses' button. You can see each respondent in the table that appears and if you click on the Response ID link to the left of the respondent, you can view their survey, as if they had mailed you a paper copy. Click on the Responses in Progress to track progress.



29. To print the survey, right click on the pop-up and select print.

*****IMPORTANT NOTE: The name of the business manager being reviewed will not appear on this printout, make a note ASAP once it is printed so you can easily identify each survey.*****

30. To see a slightly more detailed analysis of the multiple choice results across all respondents, click on the 'View Reports' button within the 'View Results' section you are already in.




31. Select 'Initial Report' to see the counts, average, variance, etc. for each multiple choice question. On the left side of the screen, I recommend you deselect those questions which are 'free response.' You will end up with 6 questions on the report.

32. To print to a PDF of these results, select the Adobe icon from the Export Report section


33. Should you have questions, issues or concerns, please contact John Globoker 44616