Introduction to Qualtrics – Quick Start Guide

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# Introduction to Qualtrics - Quick Start

Here is a walkthrough showing how to create a Qualtrics Project (survey, questionnaire or form) and some additional functionality to get you started using the system.

Login to Qualtrics

1. Go to: **https://ubc.qualtrics.com**
2. Log in with your CWL username and password
3. If you have an existing Qualtrics.com account, follow the steps to merge your account

Start Creating a Survey or Form

1. Click the green **Create Project** button, located near the upper right corner, to start creating a new survey, questionnaire or form.
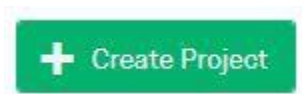
2. Type in a name for your survey or form, then click
3. **Create Project** again to get started.
   - Or, if you prefer, you can pick one of the options on the left column -- "From a Copy" (use a previously-created survey as a starting point), "From a Library" (start with a survey template).

Create Questions

Once you've followed the steps above to start creating a survey (or form), you can begin adding questions to your survey.

1. Click the green **Create a New Question** button.
- A multiple choice question will be created by default.
  - If you want to change the question type, click the green "Multiple Choice" button, located near the top of the right column, and select a different question type.

2. Create your survey question and answer(s) by typing over the sample text that appears.
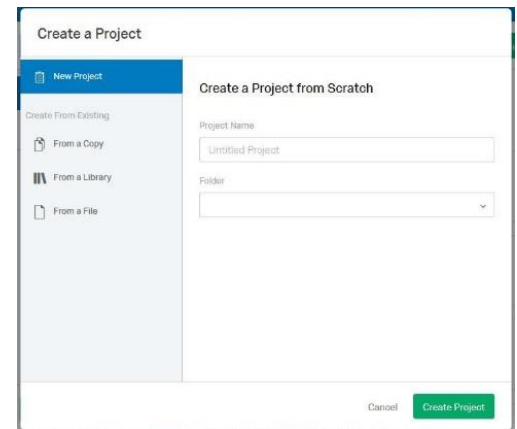
Format Your Questions

Once you start creating questions, you may want to refine the details of your questions. For example, multiple choice questions allow 4 options (a, b, c, d) by default. But what if you want more than 4, or less?

When you click to highlight a survey question you've created, you will see options on the **right column** (see picture at right). You can change the question type from Multiple Choice to another type, add and remove answer choices, make a question a required question, and more.
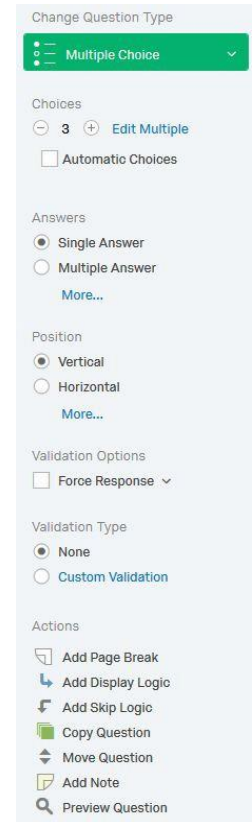
- **Change Question Type:** Change the type of question being used (Multiple Choice is the default question type). By clicking on the big green button (it will say "Multiple Choice" until you change it) and choosing from the different options shown.
- **Question Type Sub-Choices**: Each question type has multiple variations. Hover over the Down Arrow to see a preview of each and find the selection you are looking for.
- **Choices:** Click the plus or minus buttons (just below the green button) to change the number of multiple choice "answers" that will appear in your question.
- **Automatic Choices:** Choose from dozens of pre-populated answer scale choices. You can also edit them after selecting.
- **Answers Options:** Allows you to choose between Single Answer, Multiple Answer, Drop-down List, Select Box and more.
- **Position:** Allows you to choose between a Vertical, Horizontal, or Column layout.
- **Validation Options:** Allows you to enable Force Response, which requires participants to respond to the question before moving to the next page. Another choice is Request Response, which notifies the participant when they do not answer a question, letting them choose to move on or to respond.

Question-Specific Options: You will notice that each question type has different formatting options in the right column. These options vary depending on the type of question (for example, Multiple Choice or Text Entry) you choose.

Preview / Test Your Survey

To see how your survey will look to a user, just click on the blue "**Preview Survey**" button near the top at any time. You can even take the survey and see how it's working.

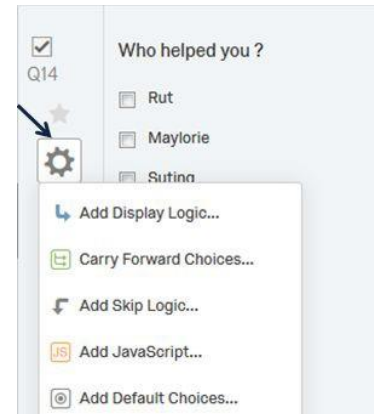# Skip a Question, Hide a Question ("Logic")

The "logic" features in Qualtrics enable you to show or not show certain questions based on an earlier answer, or skip the user to the end of the survey based upon their answer to a certain question.

Display Logic

This enables you to make a question visible or not visible under certain conditions. Click on the question to highlight it, then click the "gear" icon to the left of the question and choose "Add Display Logic." Next, use the drop-down menus provided to build your question conditions. Press "Save" when you are finished.

In the example below,, the question will only appear to survey-takers who answered "Yes" to the earlier question "Were you helped by an Advisor?" (Otherwise, it will not display.)

Skip Logic

If you want to skip the survey-taker to a later question, section ("Block") or to the end of the survey, choose "Skip Logic" from the gear icon drop-down menu. Use the options provided to build your logic, then press "Done."

In the example above, if the survey-taker answers "No" to the question "Are you a PCC student?" they will be taken to the end of the survey.

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Information Technology

The "My Projects" Section

When you first log into Qualtrics, the "My Projects" section appears. (You can also get to it by clicking the words "My Projects" in the upper left corner when you're on any other Qualtrics screen.) The My Projects area is your home base, with a list of all the surveys you have created, plus any surveys that have been shared with you. You can also view how many people have taken each survey, whether it is active, and more.

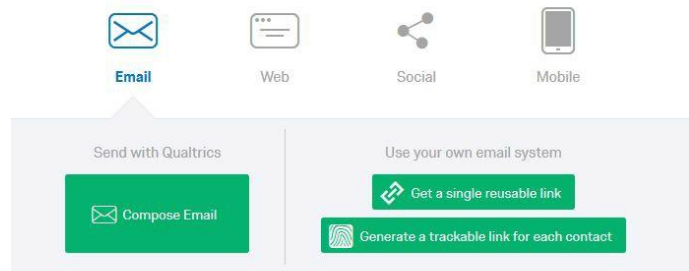Click on the name of any survey listed to start working with it.

Distribute Your Survey

Once you have created your survey, it's time to send it out to people so they can complete it. Click on the word **Distributions**, located near the top left corner, then click the green "Distribute Survey" button.

You will be asked to choose how you want to send out the survey.

- **Compose Email** -- Choose this Qualtrics Mailer option if you have a Contact List of survey-takers already created and you want to send the survey out to them. The Qualtrics Mailer allows you to send other types of links in addition to the Individual Link. The following link types are available by clicking Show Advanced Options at the bottom of the Compose Email window:

  o Individual Link (Default): Each participant receives a personal link that can only be used once.
  o Multiple Completes Link: Each participant receives a personal link that can be used multiple times. Each time this link is used, a new response is added to your results and the same contact information is recorded. Reminder and Thank You emails are not compatible with this link.
  o Anonymous Link: Each participant receives the Anonymous Link. Reminder and Thank You emails are not compatible with this link.

- **Get a Single Reuseable Link** -- This option is recommended if you do not need to track how each respondent answered each question, who completed the survey and who didn't. When you choose this option, use the link provided (copy/paste this link into an email message) and send out your survey using your regular email. (Or, you can put this link onto a department website if you prefer.)

- **Generate a Trackable Link for Each Contact** -- This option is for users who DO need to track how each survey-taker answered each question, and/or whether they completed the survey, but you need to use a third-party mail system to distribute survey invitations (instead of the Qualtrics Mailer). You'll need to provide the email addresses of each person you anticipate will be taking the survey if you choose this option.

View the Results

The "Data & Analysis" Tab

Once you have distributed your survey or form and people have taken it, it's time to view the results. Click "Data & Analysis" near the upper left. The picture below is intended as a guide to interpreting the data on this tab.

Other things to know about the "Data & Analysis" tab

- Survey results that are incomplete (i.e. the survey-taker did not finish taking the survey) will not show up in on this tab. If you want to see them, click "Responses in Progress" on the upper right.

- If you want to include the incomplete responses in your data analysis, first go to "Responses in Progress" on the upper right corner and use the drop-down menu to **Close** the incomplete responses. They will then be treated as completed responses and included in the data displayed.

- One way to see how many people answered "yes" to question 1, for example, is to create a Filter based on that question, then view how many results come up. Just click "Add Filter," specify the question you want to use to narrow down your data, and use the drop-down menus to indicate the specifics of what you want. Then scroll down to the bottom of the page to see how many results match your filter criteria.

The "Reports" Tab

Once you've followed the steps at the beginning of this handout to open up the project you want and clicked the word Reports near the top (see picture at right), it's time to look at your aggregate (as a whole) results. This is also where you can create printable reports and add colorful and graphs.

- Click one of the "Visualization" options in the right column to add a bar graph, pie chart, etc.

- Click on the questions on the left column, or press "Next Page," to toggle through the questions of your survey

- To get a .pdf, Word, or Excel-friendly version of the report, click "Report Options"

- Click "Printed Reports" near the upper left to get more report options
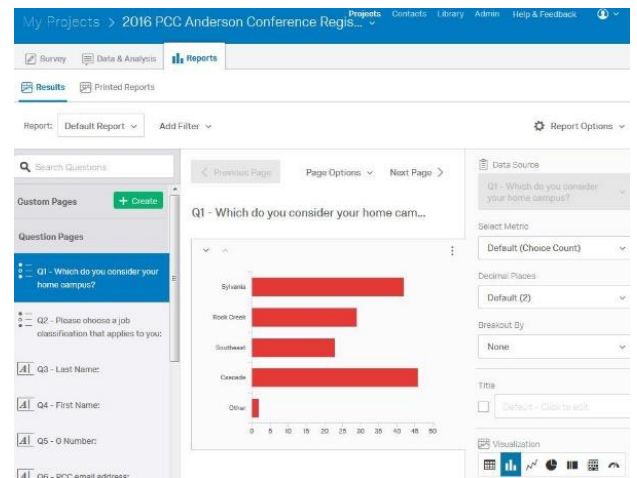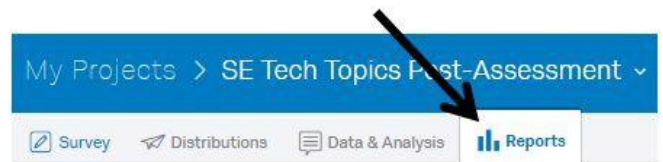
Survey Tools

Survey Tools are features to help you create surveys and give them advanced functionality. These features include options like Auto-Number Questions, Email Triggers, Quotas, Translations, and Scoring. You can access the Survey Tools by clicking on Tools in the Survey module.

- Auto-Number Questions: Change the Question Numbers for all of your questions. You can auto-number sequentially, by block, or by the internal ID number.

- Search And Replace: Quickly find specific words in a survey and replace them with another word.
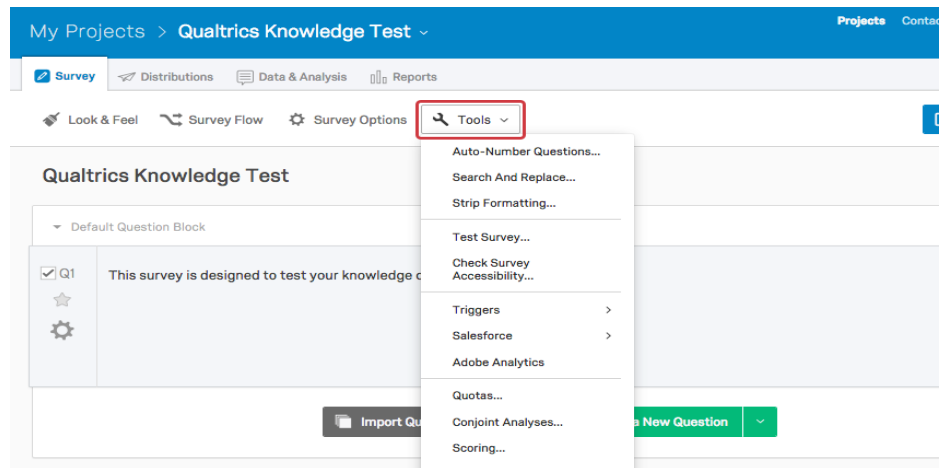
- Strip Formatting: Remove all formatting from the selected questions. Use this option if questions in your survey have different fonts or styles that you want to remove.

- Test Survey: Generate automated dummy responses for your survey to see what the dataset and report will look like before sending the survey to actual participants.

- Check Survey Accessibility: Determine whether your survey is accessible for respondents who use screen readers, and receive suggestions for improving your survey's accessibility.

- Triggers: Every time a response is submitted, automatically send emails through the Email Trigger or add respondents to a contact list through the Contact List Trigger.

- Salesforce: Integrate survey information with your Salesforce database through the Response Mapping and Triggering Surveys features.

- Quotas: Create and monitor quotas on your surveys.

- Scoring: Assign point values to answer choices to use your survey as a test or quiz.

- Translate Survey: Translate your survey into multiple languages, allowing respondents to choose which language to view the survey in.

- Create New Revision: Save a revision of your survey in order to view and restore it later if needed. By default, Qualtrics will also periodically create revisions for you that can be viewed and restored.

- View Revision History: See past revisions of your survey and, if desired, restore them so they become the current survey revision.

- Print Survey: Use this option to print or save a PDF version of your survey. This PDF file can also be exported to your computer or mobile device.

- Export Survey to Word: Export your survey as a DOCX Word document that contains the plain text of your survey questions and answer choices. (The exportable Word document can also be used as a "data dictionary" or "codebook" for those who need to know which recode values are associated with each answer choice.)

- Export/Import Survey: Export your survey as a QSF file to be imported into another account; Import from QSF or TXT.

Survey Options

Survey Options is where you go to change many general survey settings, such as the survey expiration date or the message that will appear to respondents when they finish the survey. To access these settings, click Survey Options at the top of the Survey module. Survey Options is divided into six sections, as described below.

- Survey Experience: Survey Experience includes options that will directly impact the respondent experience, such as whether or not a back button will be included and whether respondents can return and finish the survey at a later date if they don't finish in one sitting.

- Survey Protection: Survey Protection helps you ensure that only the appropriate people take your survey. You'll also find options like password protection and expiration dates.

- Survey Termination: Survey Termination contains options for controlling the survey ending experience. From here, you can choose different endings, such as redirecting respondents to a specific website or displaying a custom message. You can also choose to anonymize dataset responses.

- Inactive Surveys: Inactive Surveys lets you choose what message respondents see when they attempt to open a survey that is not currently collecting responses.

- Partial Completion: Partial Completion lets you specify how long a respondent can leave an unfinished survey before that survey is automatically closed out.

Other Commonly Used Features:

- For progress bar and other formatting options go to the **Look and Feel** module.
- For advanced branching, embedded data, page randomization, redirects and survey blocks, go to **Survey Flow** module.
- For recoding and response randomization, go to the **Settings** wheel (left) of each question.
- For looping and question randomization, go to the **Block Options** (top right) of each block.
- To pipe text into a question use the **Piped Text** button, or into email look for the **{a}** icon.
- To add graphics or videos to a question use the **Rich Content Editor**.

For More Information

The Qualtrics website includes comprehensive and easy-to-follow help documentation. Tutorials, webinars and detailed directions are available via Qualtrics' extensive online resource, Qualtrics Support.
www.qualtrics.com/support

For fast, individualized support over chat, email or a scheduled phone call, please start here:
www.qualtrics.com/support-center