



Qualtrics Tutorials

How to create a Survey

July 2016



****Note: This tutorial is for New Users. Experienced Users please visit the Qualtrics website to see the new changes or click the link, <https://www.qualtrics.com/support/explore-the-new-qualtrics/>. ****

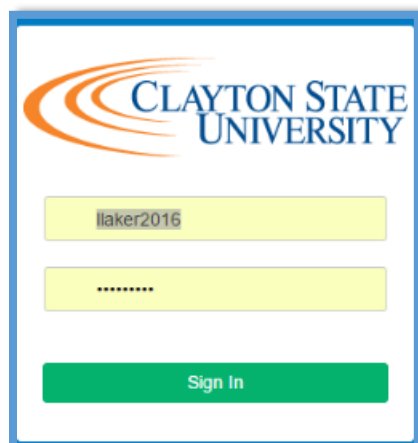
What is Qualtrics Insight Platform?

Is a software solution that allows its users to connect data and drive outcomes. This software can be used to survey students, conduct research, and analyze the data all in one.

Clayton State University has purchased a campus license to Qualtrics. Both faculty and students can use Qualtrics to create surveys that contain many different types of questions and formats then analyze the results using Qualtrics itself or by downloading the data to Excel. Users can also collaborate easily on surveys.

New Users

To access Qualtrics, go to <https://claytonstate.qualtrics.com/> . Using the Clayton State University login credentials (same as the DUCK), login into Qualtrics.



The image shows a login form for Clayton State University. At the top, there is the university's logo, which consists of three orange curved lines to the left of the text "CLAYTON STATE UNIVERSITY" in blue. Below the logo, there are two yellow input fields. The first field contains the text "laker2016". The second field contains a series of dots, indicating a password field. Below these two fields is a green button with the text "Sign In" in white.

After the New User logs in, please read and agree to the Terms of Service.

Terms of Service

Qualtrics Terms of Service These Terms may be updated from time to time as explained in Section 12.4. We encourage you to refer to these Terms regularly to ensure your compliance. They are always found at www.qualtrics.com/terms-of-service.

If a valid license agreement exists between you and Qualtrics, those terms take precedence over these Terms.

1. Acceptance of Terms

Please read these Terms of Service ("**Terms**") carefully before using www.qualtrics.com (the "**Website**") or the products or services offered by Qualtrics (the "**Services**"). These Terms take effect when you click an I Accept button or check box presented with these Terms or, if earlier, when you use any of the Services or Website. You represent to us that you are lawfully able to enter into contracts (e.g., you are not a minor). If you are agreeing to these Terms for an entity, such as the entity you work for, you represent to us that you have legal authority to bind that entity.

2. Description of Qualtrics Services

2.1 Qualtrics, LLC ("**we**" or "**us**") provides a variety of Services, including access to proprietary computer software programs developed by us that facilitate and automate the process of conducting surveys, polls, assessments, intercepts, and related systems, security, updates and support services, via a web browser and the Internet.

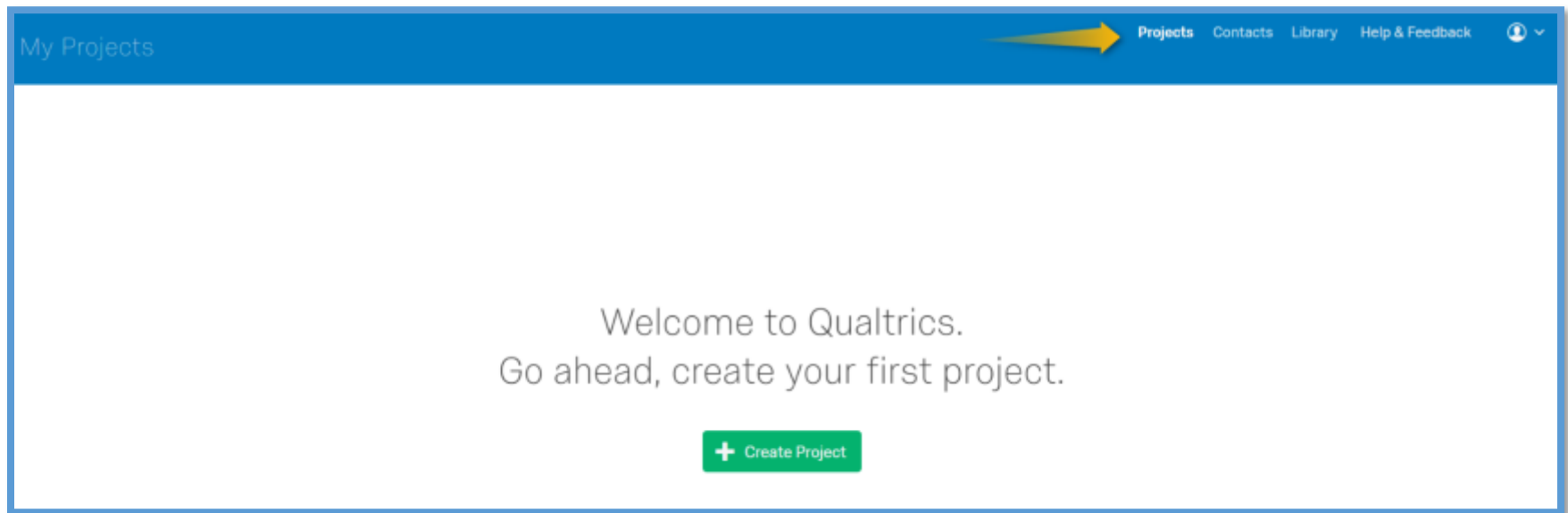
2.2 For purposes of these Terms, "**you**" means you and the entity you represent and also refers to any person accessing the Services by any method on your behalf.

2.3 For purposes of these Terms, data includes all survey responses, reports, and any other information input or generated on behalf of you in connection with the Services ("**Data**").

Log out

 I accept

Home Screen



This is the New User screen. In the upper right hand corner, the Project button, which is this screen, the Contacts button, the Library, Help & Feedback, and the user account button.

The current screen is the Project screen, this is where all the surveys will appear.

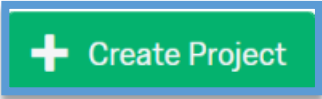
The Contacts button will contain all of the user's contacts. This includes those contacts that are included in a mailing list, panels, and people the user manually added.

The Library button contains Graphics, Files, Custom Messages, and survey questions that the user has elected to reuse for other surveys.

The Help & Feedback button offers a large array of tutorials, webinars, online training, and ways to contact Qualtrics.

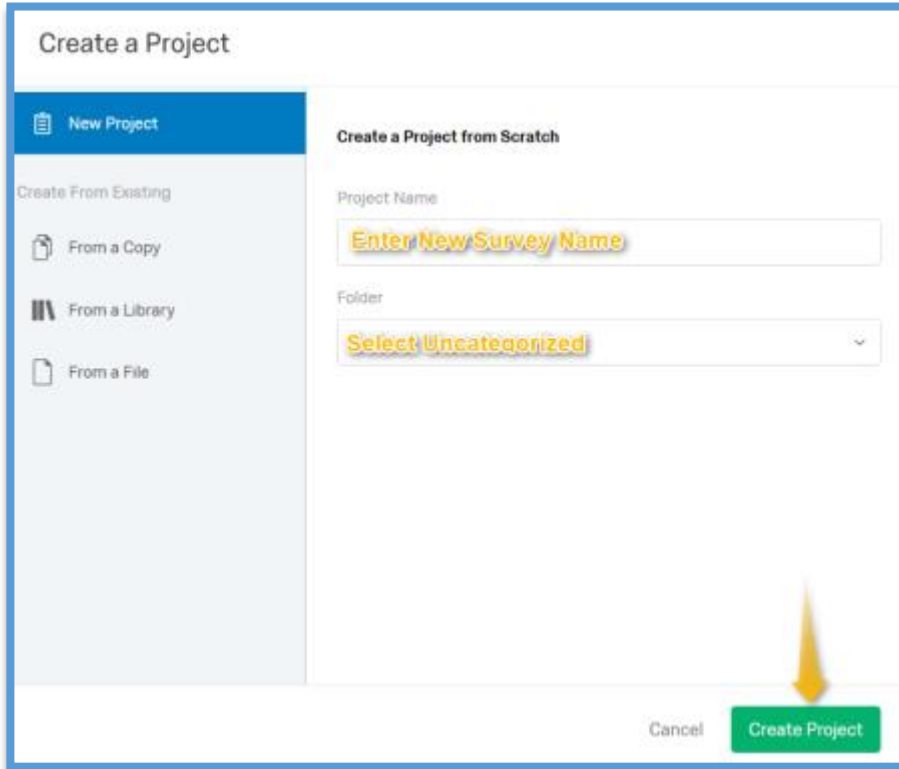
The user account button will allow the user to manage their Qualtrics account and Logout.

Creating a New Survey



Step 1: Click on Create Project.

Step 2: Fill in the New Project Name and select the Folder.



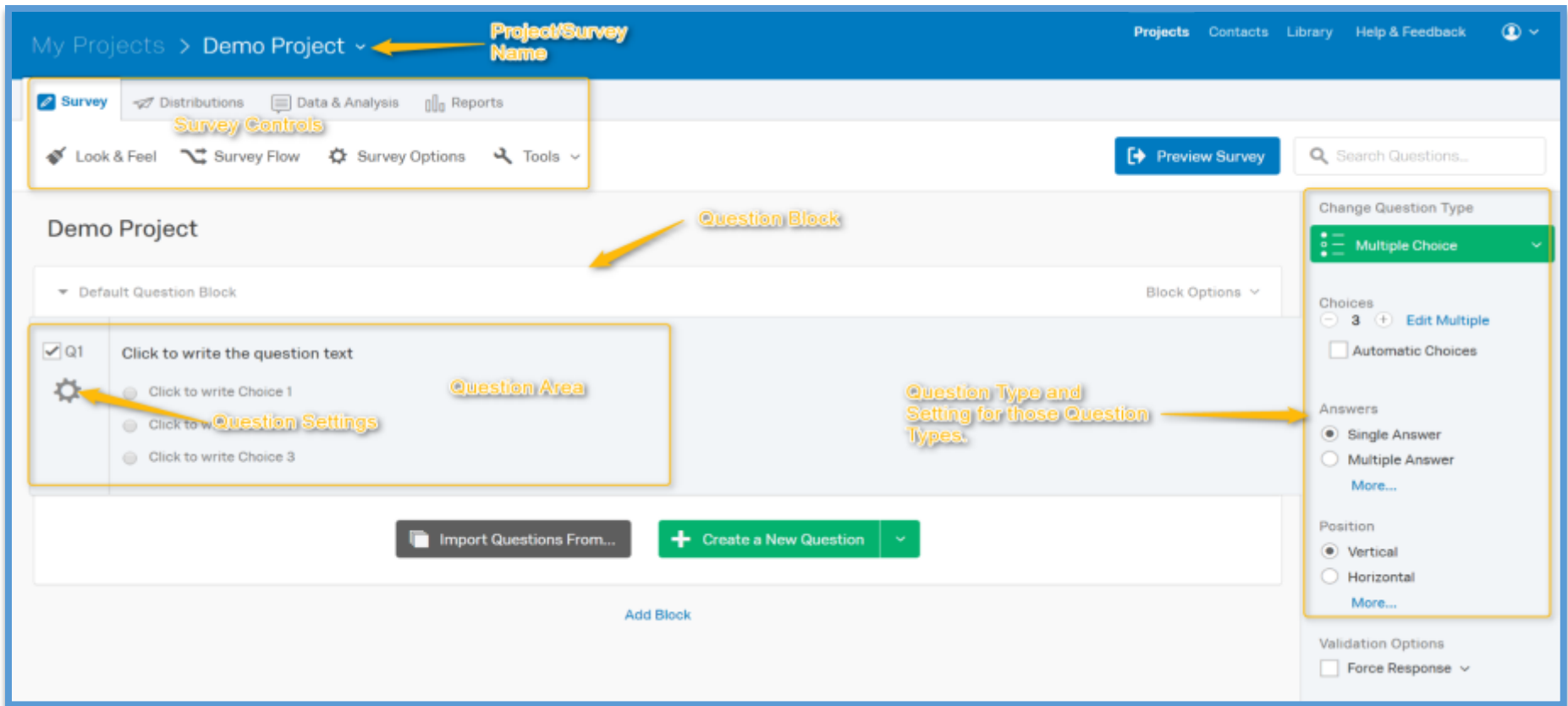
Select create “From a Copy” when someone has collaborated on a survey with the user or the user has a previous created survey that can be reused.

Select create “From a Library” if the user has some saved surveys in the Library.

Select create “From a file” if the user has a file that can be used in the Library.

Step 3: Click Create Project.

**From this point forward the words Project or Survey maybe used interchangeably.



The Project Name will indicate the name of the current survey the user is working on.

The Survey Options allows the user to change the way the survey operates, looks, how it responds, how it can be distributed, and others things that will be discussed later in this tutorial.























The Question area is where the user will type in or copy and paste the survey questions and answer choices.

The Question Setting allows the user to control how this question is displayed, answered, and valued. Some of the features will be covered later.

The Question Type allows the user to select from the large array of questions that are available for use. It also allows the user the ability to customize the question type as needed. Each of the question types described below can be added to a survey by either (1) using the **Change Question Type** dropdown menu to change an existing question or (2) clicking the dropdown arrow next to **Create a New Question** to add a new question.

The Preview Survey button allows the user to view and complete the survey to test all functions and options added to the survey.

Question Types

Static Content	 Descriptive Text	 Graphic
Standard Questions	 Multiple Choice	 Matrix Table
	 Text Entry	 Slider
	 Rank Order	 Side by Side
Specialty Questions	 Constant Sum	 Pick, Group, and Rank
	 Hot Spot	 Heat Map
	 Graphic Slider	 Gap Analysis
	 Drill Down	 Net Promoter Score®
	 Highlight	 Signature
	Advanced	 Timing
 File Upload		 Captcha Verification
Replace From Library	 Question Library	

The Static Content questions do not require any action, they are used to display information.

- ❖ Descriptive Text question can be used to add an introduction or instructions to the survey.
- ❖ Graphic questions can be used to display an image to the respondent.

The Standard Questions are the most common and the most effective way to gather information.

- ❖ Multiple Choice questions form the basis of most research. They can be displayed as a traditional list of choices or as a dropdown menu, select box, etc.
- ❖ Text Entry is used to gather open-ended feedback from respondents. These responses can be lengthy essays, standard form information such as name and email address, or anything in between.
- ❖ Rank Order is used to determine each respondent's order of preference for a list of items.
- ❖ Matrix Table is used to collect multiple pieces of information in one question. This type provides an effective way to condense the survey or to group similar items into one question.
- ❖ Sliders let respondents indicate their level of preference with a drag-able bar rather than a traditional button or checkbox.

- ❖ Side by Side questions lets the user ask multiple questions in one condensed table and provides an effective way of shortening the survey while gathering the same amount of data.

Specialty Questions are used in more specific situations and gather more targeted data.

- ❖ Constant Sum collects numeric data and displays a sum to the respondent. This type is often used for allocation assessments, such as defining how you spend your time in different activities.
- ❖ Hot Spot allows respondents to interact with regions of an image. This type is often used in usability testing and concept testing.
- ❖ This variation of the Slider question has respondents use various graphic options, such as changing a frown to a smile or choosing a grade, to indicate their level of preference.
- ❖ Drill Down helps respondents choose from a long list by starting with a broad category and then honing in on the choices that are relevant to the respondent.
- ❖ Pick Group and Rank is used for sorting activities. Respondents place items into groups and have the option to rank the items within the group.
- ❖ Heat Map lets respondents click a specific point on an image. In your data, you can see a heat map that shows which parts of the image were most often clicked. This type is often used for web development (e.g., eye flow analysis) and advertisement testing.
- ❖ This variation on the Side by Side question measures satisfaction and then detects why any “gaps” in satisfaction exist.
- ❖ NPS® tracks customer loyalty with one simple, standardized question: “On a scale from 0-10, how likely are you to recommend our company to a friend or colleague?”
- ❖ The Highlight question type allows you to present survey participants with an interactive text sample. Participants can select words from the text and evaluate using criteria you choose. For example, whether they like or dislike the selected text.
- ❖ The Signature question type presents survey participants with an entry box where they can draw their signature. On a desktop, they can use their mouse, and on a mobile device they can use their finger.

The Advanced Questions go above and beyond standard survey insights; they allow the user to obtain detailed information about the respondent.

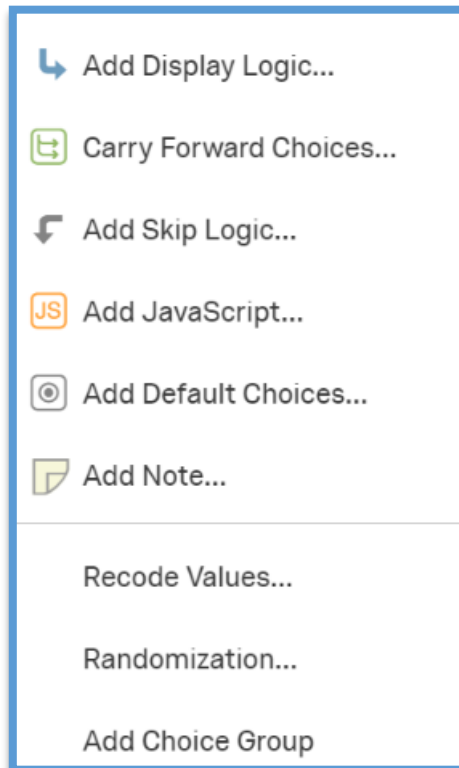
- ❖ This hidden question is used to time—as well as limit—how long participants spend on a page of the survey.
- ❖ File Upload is used to collect information beyond the survey questions, such as user-uploaded photos or documents.
- ❖ Captcha Verification is used to ensure that the respondents aren’t robots. This question has participants respond to a challenge to verify they are real humans.

- ❖ Meta Info reports the public information about the respondent's computer, such as their browser and operating system. The question requires no respondent action and is completely hidden and their interactions with the survey, often without requiring any action from the respondent.

Replace From Library

Clicking on the Question Library icon will take the user to the Qualtrics question library. Qualtrics has put together a variety of template questions that can be pulled directly into the survey.

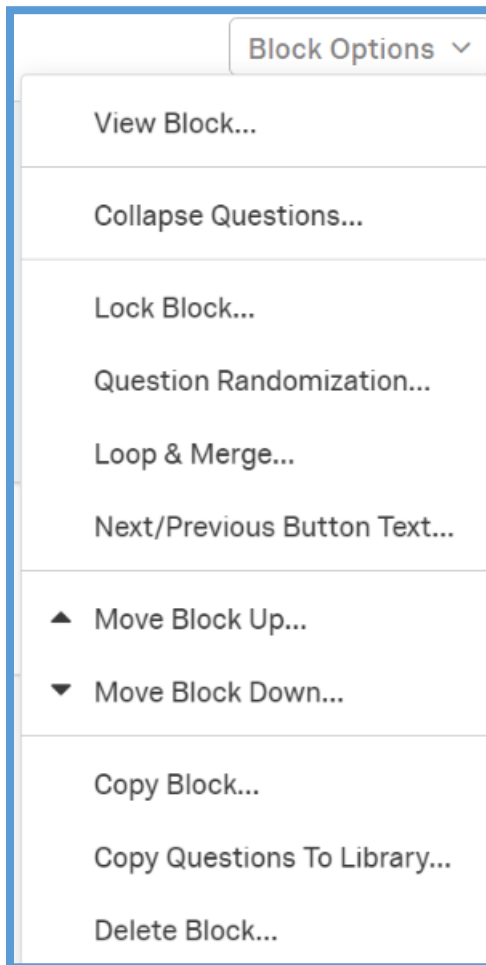
The Question Settings



- ❖ Add Display Logic: Create logic that determines the conditions for which the question will be displayed.
- ❖ Carry Forward Choices: Pull in the answer choices, statements, or scale points from a previous question in the survey, for use in the current question.
- ❖ Add Skip Logic: Skip respondents ahead to another point in the survey depending on how they answer the question.
- ❖ Add JavaScript: Customize the question with JavaScript, a programming language that helps the user add interactive features and enhanced functionality to the survey.
- ❖ Add Default Choices: Choose a default answer that will be preselected when the respondent starts the survey.
- ❖ Add Note: Add a comment to the question for personal benefit or for anyone sharing the survey. These notes will not be displayed to the respondents.
- ❖ Recode Values: Use this option to change the default coding or variable names for the choices. The coding set here will be reflected in the reports and raw data and is used to calculate all statistics.
- ❖ Randomization: Set the choices to display in a random order.
- ❖ Add Choice Group: Group answer choices for the respondent (available for Multiple Choice and Matrix Table questions).

Blocks

Blocks are sets of questions within the survey. Typically, questions are separated into blocks for the purpose of conditionally displaying an entire block of questions, or for randomly presenting entire blocks of questions. Blocks can also be used to organize longer surveys. Blocks can be renamed to reflect a more descriptive text. Double click on the default block name to change it.

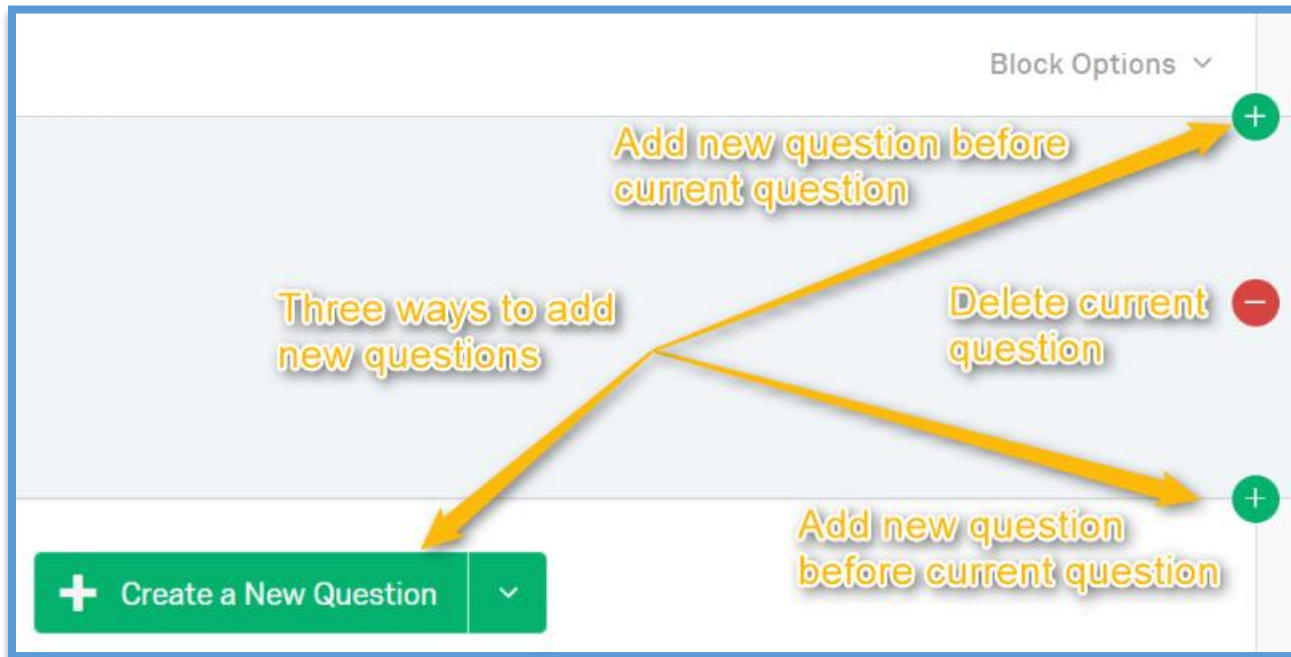


Block Options

- ❖ View Block allows the users to preview a single block in the survey. This is especially helpful in longer surveys; rather than previewing the entire survey from the beginning, the user can preview just a specific section.
- ❖ Collapse Questions reduces the size of the questions for easy navigation and can be enabled or disabled by clicking Collapse Questions. When this option is enabled, the question text and any choice text will display in a condensed format. When collapsed, an icon appears to the left of the questions and indicates what the question type is. Radio buttons, checkboxes, text entry boxes, and other features of your questions will not display.
- ❖ Lock Block is useful when others have access to the survey but no edits are to be made to the block. A password can be added to the block so it can only be unlocked for further edits by entering the password. In the Lock Block menu, lock the block without a password by simply clicking Lock. To use a password, first type a password and then click Lock. Blocks can be locked and unlocked at will, but always remember to lock it once edits are finished.
- ❖ Question Randomization allows the user randomize the order of the questions in the block, display only a subset of the questions, and even permanently hide certain questions.
- ❖ Loop & Merge allows the user to present the same questions to a respondent multiple times. For example, if the block is a set of product satisfaction questions, the user might want to repeat the block for each product the respondent has purchased.
- ❖ Using the Next/Previous Button Text option, can specify the text of the Next and Previous buttons that respondents see in this particular block.
- ❖ The Copy Block function allows the user to copy the block within the current survey. This works as a time saver if there are similar questions that are repeated in the survey. To copy a block, click Copy Block and enter in the name of the new block.
- ❖ The Copy Questions to the Library function allows individual questions to be copied to the library instead of saving the entire block.

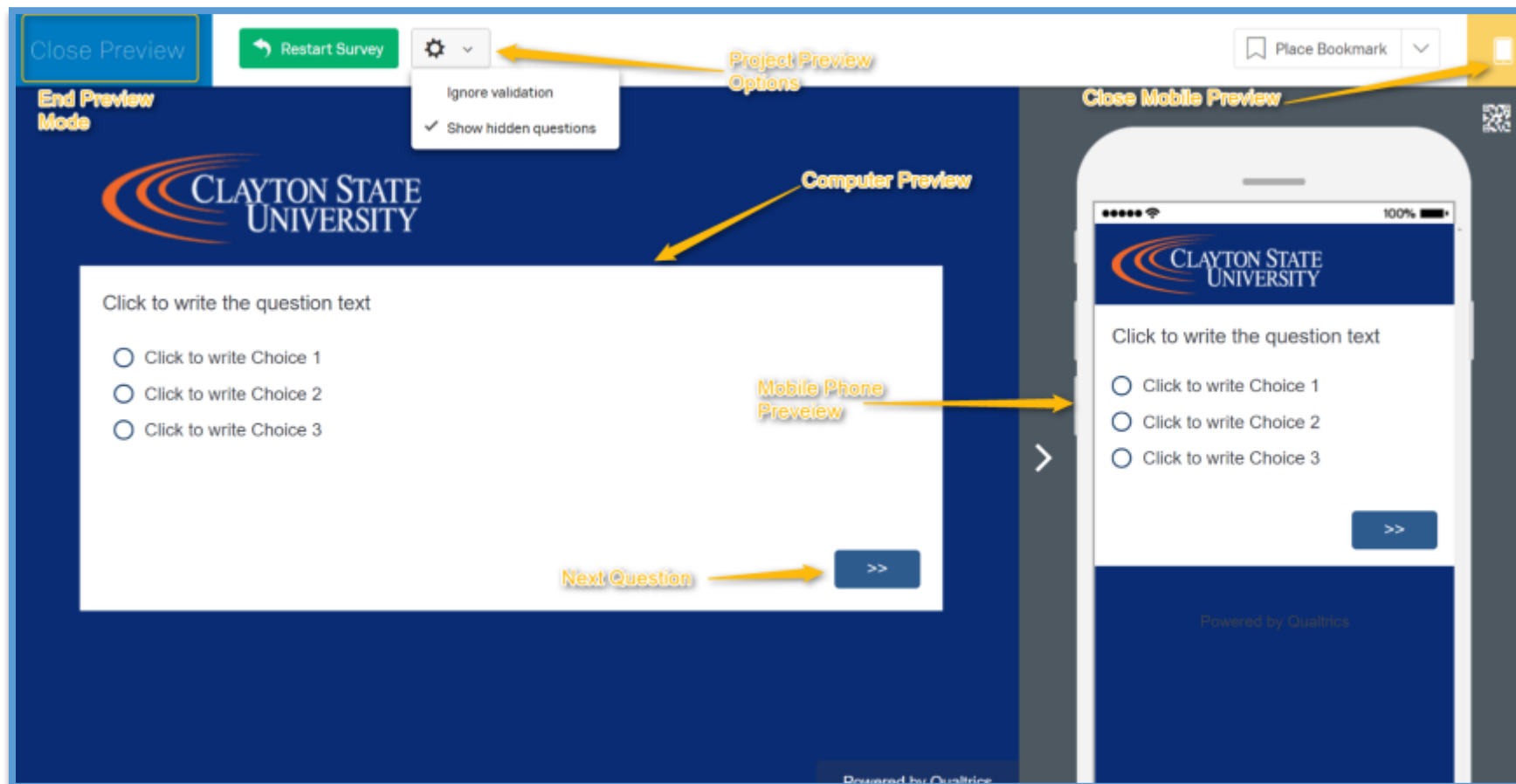
- ❖ The Delete Block function allows the user to completely remove a block of questions from the survey. If the block is deleted the question in the block will be deleted as well. If a mistake is made the deleted questions will appear in the Trash section at the bottom of the survey.

Adding Questions to the Survey



To add a question to the survey either click the plus(+) sign that will appear at the top and bottom of the current question or click the Create a New Question button at the bottom of the survey.

Previewing the Survey

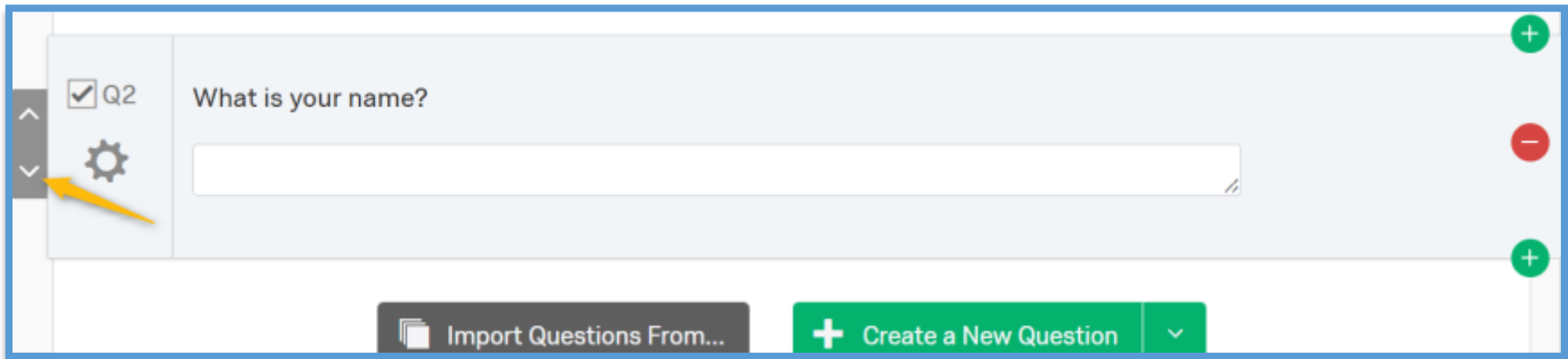


Saving the Survey

The survey will save after every change has been made automatically.

Moving Questions

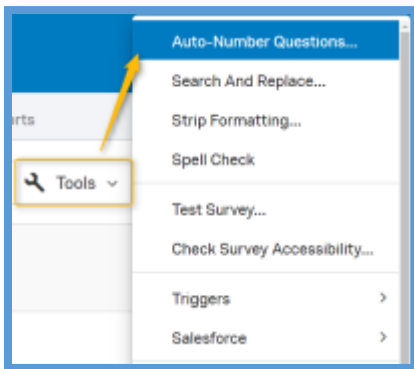
In Qualtrics, questions can be moved within the project if the created location is not suitable.



To move a question up or down in the survey, select or click inside the question, then click on the up or down arrows that appear at the left side of the question.

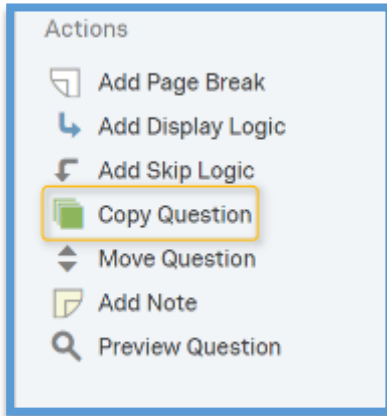
Renumbering Questions

When creating a survey sometime the questions may become out of order by number. The numbers can be adjusted to reflect the correct numbering order.



To renumber the questions, make sure the Survey tab is selected, then select Tools at the top of the Qualtrics window, then Autonumber. The user has three formats of numbering to select.

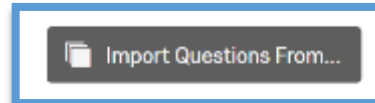
Copying a Question (Same Survey)



Select the question that is to be copied then click on Copy Question in the Action Panel at on the bottom right side of the screen. By default the copy is added below the selected question.

Copying a Question (Different Survey)

Qualtrics allows the user to copy questions from other surveys to Import into the current survey.



Step 1: Click the Grey button at the bottom of the survey.

Step 2: Select the Library where the question is located. It will appear as My Surveys if the user has previous surveys.

Step 3: Select the appropriate survey.

Step 4: Select the appropriate question.

The user will have the options to copy an entire block. Click on the specific question to only import that question.

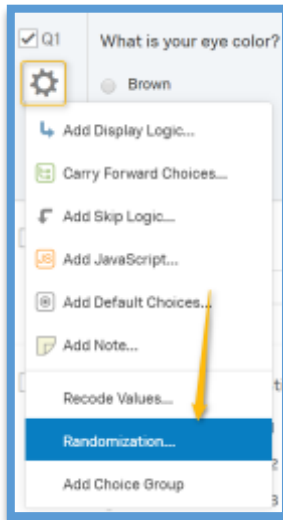
Force Response



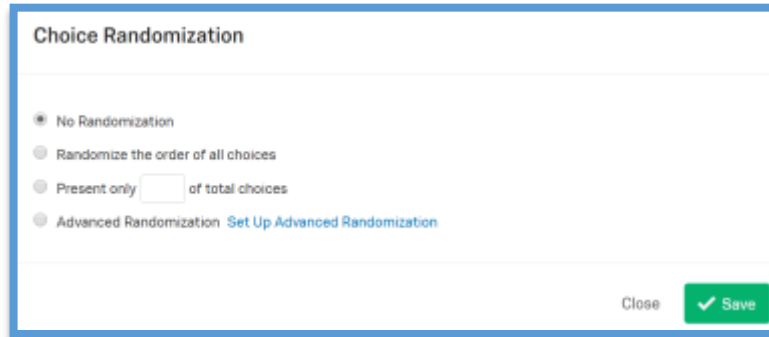
Occasionally, the user will have questions that must need be answered. Force Response will make that question required and the respondent cannot proceed without answering the question. To Force a response, click on the question that is required. Look in the Question Type panel to the left and check Force Response under Validation Options.

Randomizing Answers

To randomize the answers in a question select the question then select the Advanced Question Options button on the left side.



Then Select how the question is to be Randomized.

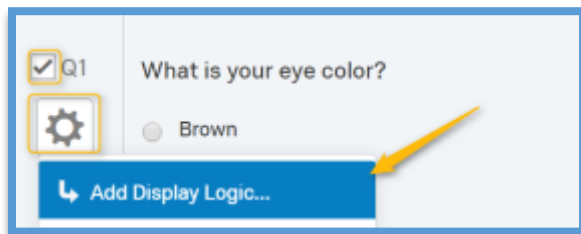


- ❖ **No Randomization:** Choices are not randomized.
- ❖ **Randomize the order of all choices:** Randomizes all choices.
- ❖ **Present only__ of total Choices:** Randomly displays a specified number of choices from the total choices available.
- ❖ **Advanced Randomization:** Specify which choices are randomized and which are always displayed in the same location.

Using Skip or Display Logic

Select the question then click on the Advanced Question Options on the left side.

Select either Skip or Display logic.

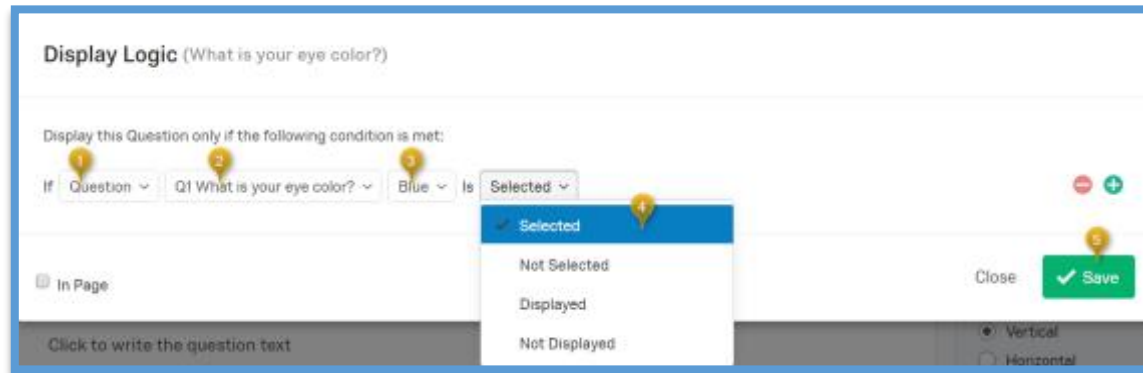


Users can use Display Logic to create a survey that is customized to each respondent. When a specific question or answer choice pertains only to certain respondents, the user can set Display Logic on it so that it shows conditionally, based on previous information. Through Display Logic, the user can create surveys that dynamically adapt to the respondents' answers.

Skip logic means that the survey will skip to a certain question based upon the answer to this question. Skip logic can also be used to end a survey based on the answer to a question.

Display logic means that this question will be displayed **ONLY** if other questions are answered in a certain way.

Set the condition that must be met for the question to display. The condition can be based on any of the following:



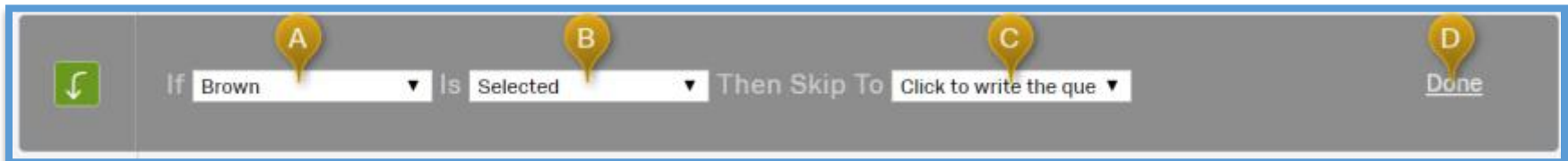
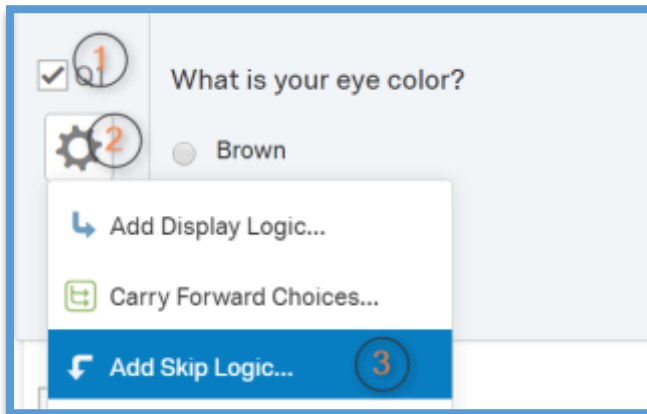
- ❖ Previous Question: Display a question only if the respondent chose a specific answer to a previous question.
- ❖ Embedded Data: Use any information you have stored about the respondent to set display conditions. For example, only display a question to those who have an Embedded Data field for Age, equal to 25.
- ❖ Quota: Once a Quota has been created, set a condition based on whether or not the quota has been met.
- ❖ Contact List: Base the condition on information already stored in a contact list field, such as first name, last name, or email.
- ❖ GeoIP Location: Automatically use the IP address of the survey participant to estimate their location and set a condition based on country, city, postal code, etc.
- ❖ Loop & Merge: After a Loop & Merge block has been created, set the conditions within the Loop & Merge based on the current loop.
- ❖ Device Type: Base the condition on what type of mobile device is being used, including Android, iPhone, Windows, and others.

Select In Page if the question is to appear immediately once the condition is met, rather than displaying it on the next page of the survey.

Click Save after the user logic has been selected.

Skip Logic

Select the question that skip logic needs to be applied. Click the sprocket to left of the question, then select Add Skip Logic.

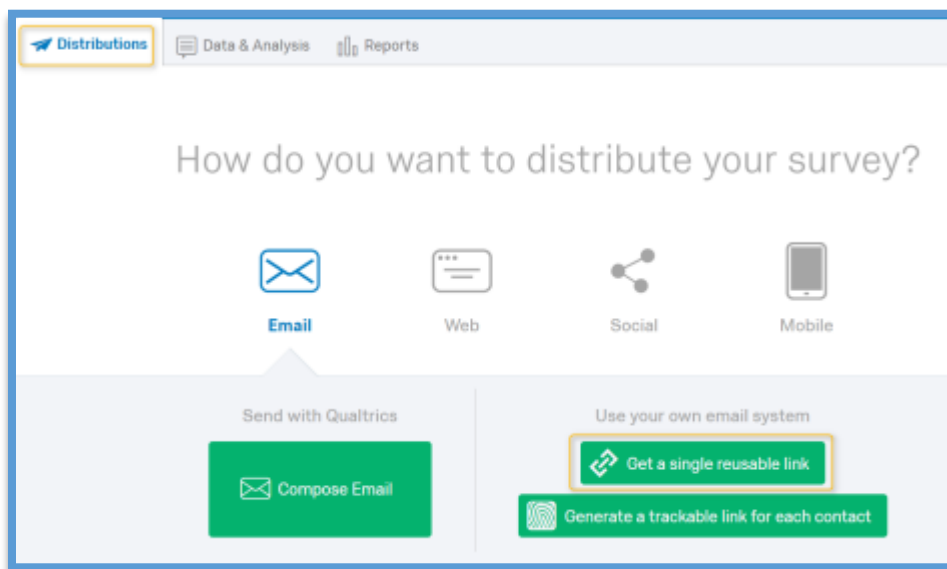


- A. Select the answer choice to use in the skip logic.
- B. Select how the participant should interact with this choice to trigger Skip Logic.
- C. Specify where respondents who skip ahead should be sent.
- D. Click down when all desired logic has been applied.

Repeat this step to create additional skip logic statements. The Color indicate the option menu for the select statement.

Launching the Survey

Click on the Distribution button in the survey options.



Select a method to deliver the survey. The most common is “Get a single reusable link”. Provide the user an anonymous link to complete the survey.



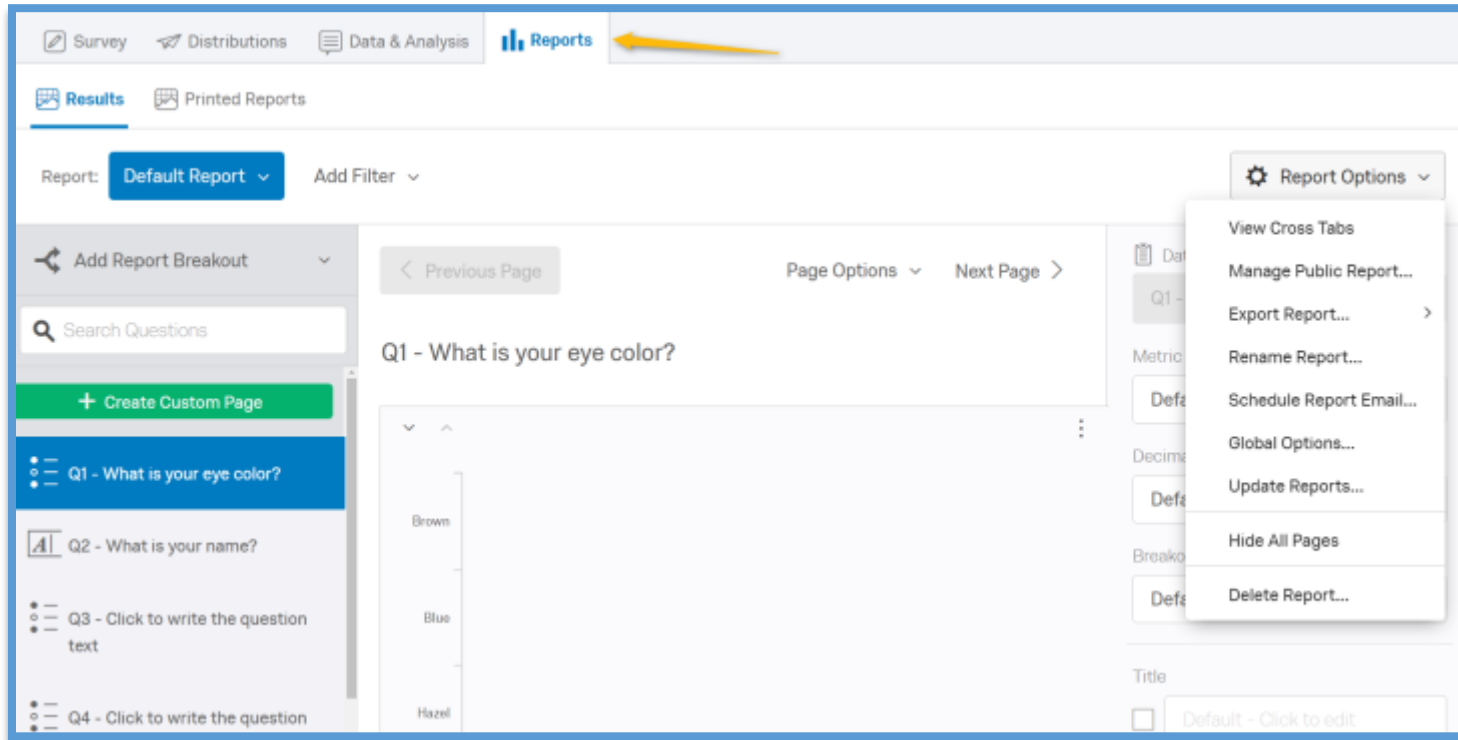
Survey's that have been launched cannot be edited without unlocking them. It is recommended not to make edits to a launched survey.

To Unlock: Click on the active survey, at the top of the first question click unlock. Select Unlock in the pop-up window. Click lock when all edits have been made.

Reports

Once the survey has been launched and collected the desired number of completions, the results will need to be collected.

Click on the Reports tab in the Survey Options toolbar at the top of the page.

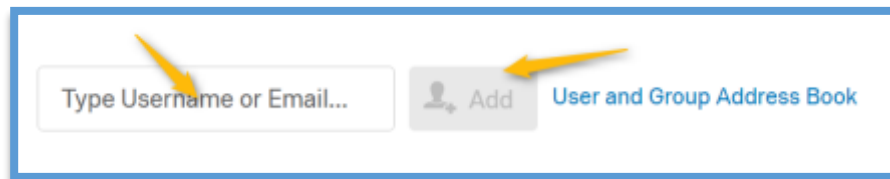
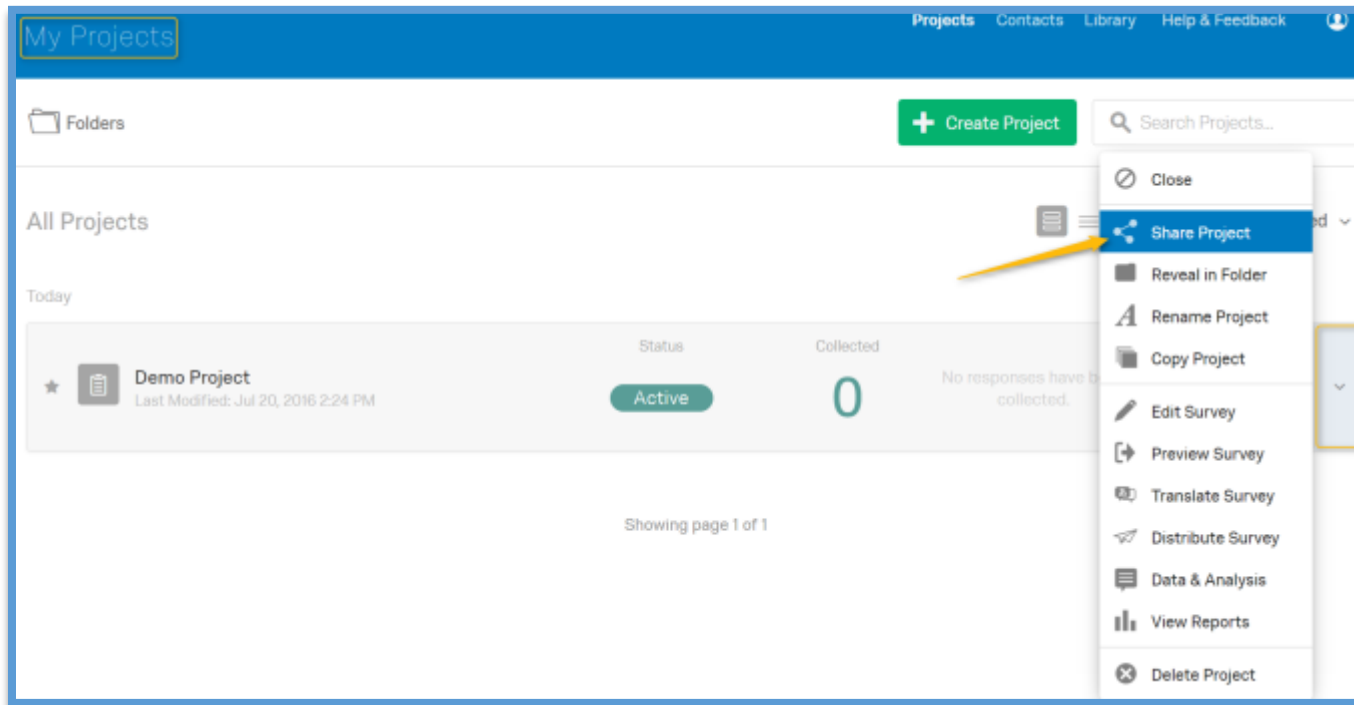


For an in depth look at Reports click this link <https://www.qualtrics.com/support/survey-platform/reports-module/reports-overview/#introduction>.

Sharing the Project


When creating a larger survey, more than one person may need to work on the survey at a given time. Qualtrics will allow the creator of the survey to share it with other users.

On the My Projects page, click on the down arrow to the left of the survey that is to be shared.



Type in the User name or email of the person that the survey should be shared with. Then click Add.

After the user has identified the individuals that should share the survey, Grant them permission according to what they need . Then Click Save.

Edit	View Reports	Activate/Deactivate	Copy	Distribute	
<input checked="" type="checkbox"/> Details	<input checked="" type="checkbox"/> Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Once the project has been shared, the associates will be able to see the project listed in their Shared with me folder the next time they log in. To access this folder, go to the My Projects page, click on Folders, and select Shared with me. The associates will also receive an email notification letting them know a project has been shared with them.

If the individual is outside of the University, simply type their email address in the box and Qualtrics will email them to let them know they need to create an account to view the survey that has been shared with them.