Qualtrics Instructions

Create a Survey/Project

- Go to the Ursinus College homepage and click on Faculty and Staff.
- Click on Qualtrics.
- Login to Qualtrics using your Ursinus username and password.
- Click on +Create Project.
- Choose Research Core.
- You can create a project from scratch by clicking on Blank Survey Project or copy an existing project by choosing Create from Existing.
- Click on the arrow next to Create a New Question and choose the question type. See the image below for the current question types available. Hover over each question type to see an example.

A “Descriptive Text” question is used to provide information to participants in a header. They do not reply or answer this question.

A “Text Entry” question is a fill in the blank. When formatting the question, you can choose to make it a single line, multi-line, or essay text box (the only difference between these three is the size of the answer box), or a form with multiple questions and answer boxes.

To add a new question, either click on the green + icon that appears on the right-hand side before and after each question when you hover over it. Alternatively, you can scroll to the bottom and click on “Create a new question”.

Format your question by using the column on the right-hand side.
- Under Choices, choose how many answer choices you want for that question.
- Check the box next to “Automatic choices/statements/items” to see a list of popular answer choices. This will automatically input the answer choices for you. If you can’t find the answer choices you want to use, uncheck the box and type them in yourself.
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- Under **Answers**, choose “Multiple Answers” if you want to allow the participant to choose more than one answer. Click on “More” in this section for more options.
- Under **Validation Options**, choose “Force Response” if you do not want to allow participants to skip questions.

**Copy, Move, and Delete Questions**

- To copy a question, click on the question and on the right-hand side, choose “Copy Question”.
- To move a question, click on the question and on the right-hand side, choose “Move Question”. Alternatively, you can choose the arrows on the left-hand side that appear once you hover over the question.
- To delete a question, hover over the question and click on the red – icon.

**Display Logic**

- Use display logic if you only want a question to show under certain conditions.
- To use display logic, click on the question that should only show under certain conditions and on the right-hand side, choose “Add Display Logic”.
- Set the conditions (e.g. Display only if Question 1 Answer Choice 1 is selected). Then click **Save**.
- Do this for every question that should only show under certain conditions.
- **Preview** your survey to test.

**Skip Logic**

- Use skip logic if you want to skip several questions under certain conditions (e.g. skip to the end of the survey if they answer “No” on Question 2).
- To use skip logic, click on the question and on the right-hand side, choose “Add Skip Logic”.
- Set the conditions (e.g. If “No” is selected, then skip to Question 23). Then click **Done**.
- If you do not skip to the end of the survey but to a specific question, participants will then continue answering the questions following that specific question (e.g. If the skip logic sends them to Question 23 because they answered “No”, they are then shown Question 23, 24, 25, etc. until the end of the survey).
- **Preview** your survey to test.

**Piped Text**

- Within a question or answer choice, you can pipe text in from other questions, answers, or from a Contact List. For example, let’s say you asked participants what their favorite color is. In the next question, you want to ask them “Why is ____ your favorite color?” You can pipe in their answer choice by:
  - Clicking on the “Why is ____ your favorite color?” question text and putting your cursor where the answer choice should show (in this example, it would be between “is” and “your”).
  - Selecting “Piped Text”.
  - Choose **Survey Question**, then
    - If the original question is a multiple choice, choose “Selected Choices”.
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- If the original question is a text entry, choose the title of the question (e.g. What is your favorite color?). Do NOT choose Question text.
  - Qualtrics will create a code and place it in your question.
  - Preview your survey to test.

Scoring

- If you are creating a quiz or test and you want Qualtrics to score it automatically, you can do this by clicking on Tools > Scoring.
- For each correct answer, put in a point value (e.g. Answer Choice 2 = 5 pts.). Leave the other answer choices blank (It will display a # symbol. This means the answer choice = 0 points).

Survey Look and Feel

- You can organize questions into different blocks (e.g. one block for demographic questions, another block for a specific subject, etc.) by clicking on Add Block at the bottom of the screen and then adding questions in there.
- If you click on Look and Feel, you can customize the Next and Back buttons, add a Progress Bar, and change the font and colors. You can also add a Header and Footer under the Look and Feel’s Advanced Section.

Survey Options

- Before you launch your survey, go to Survey Options. Here you can:
  - Add a Back button.
  - Set your survey to be Open Access if you want to use an anonymous link or By Invitation Only if you are using Contact Lists. By default, “Open Access” allows users to take the survey more than once. By default, “By Invitation Only” allows users to take the survey once.
  - Prevent Ballot Box Stuffing (this prevents participants from taking the survey more than once in the same browser. This doesn’t prevent participants from taking the survey again in another browser or computer. See Distribute Your Survey for more lock-down options or use “By Invitation Only” and a Contact List).
  - Create a survey expiration date if you wish. If you don’t, you will have to manually close/pause the survey.
  - Create a custom end of survey or thank you message.
  - Make the survey completely anonymous (not recommended unless total anonymity is needed).

Triggers

- If you would like Qualtrics to send your participants, someone else, or you a copy of the participant’s survey responses or additional feedback, you can set an Email Trigger. To do this, go to the survey and:
  - Click on Tools.
  - Click on Triggers > Email Triggers.
  - It defaults to sending you an email once a participant has completed the survey. However, you can change that by adding a condition at the top (e.g. If Question 2
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Answer Choice 2 is selected). You can also change your email address to someone else’s under **To Email Address**.

- If you want a copy of their survey results, make sure the box next to “**Include Response Report**” is checked at the bottom.
- To have Qualtrics send a copy of the survey results to the participant, go to the body of the message and click on the {a} button. Pipe in their email address by either clicking on Survey Question> Email if you asked for their email in the survey or by clicking on Panels Field> Recipient Email if you are using a Contact List/Panel. Copy that code and paste it in the “To Email Address” field.
- Add a message to the body and click on **Save Trigger**.

**Preview Your Survey**

- Before your finish editing your survey, click on the **Preview Survey** icon. Test your survey questions, especially if you are using any display logic, skip logic, or piped text.
- Note that if you go through the entire survey and hit Submit within the Preview, it will save your answers in the Data and Analysis section. Don’t hit Submit if you want to test your survey but not have the answer choices show up.
- Click on Close Preview to return to your survey.

**Distribute Your Survey**

How do you want to send/distribute your survey?

- **Post the survey link online:**
  a. Under Survey Options, select the radio button next to “Open Access”.
  b. Under Distributions, use Anonymous (or single reusable) link.
  c. Copy and paste that link into your website.
- **Send the survey link in an email via Outlook or your personal email:**
  a. Under Survey Options, select the radio button next to “Open Access”.
  b. Under Distributions, use Anonymous (or single reusable) link.
  c. Copy and paste that link into your email.
- **Have Qualtrics email the survey link to a specific group of people (doing this will prevent respondents from taking the survey more than once and will capture identifying information about the respondent):**
  a. Under Survey Options, select the radio button next to “By invitation only”.
  b. Create a Contact List/Panel of the people you wish to send the survey to by following these directions:
     i. Click on Contacts at the top right-hand side of the screen.
     ii. Choose +Create Contact List. Give it a name.
     iii. Upload a spreadsheet of the contact list or input them manually.
  c. Under Distributions, use Emails to send survey link to that Contact List.
If you need to know who took the survey, you can do any one of the following:

- Create a survey question asking for their name.
- Send your survey to a Contact List via the Qualtrics email distribution.
- Use authentication to require respondents to sign in with their Ursinus username and password by following these instructions:
  - Edit the survey and go to Survey Flow.
  - Click on Add a New Element here.
  - Select Authenticator.

- Move the Question block(s) below the new Authentication block by selecting the Move icon and dragging it down to where the “Add a New Element here” is displayed.
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- Change the **Authentication Type** to SSO.
- **Uncheck** the “Associate Respondent with Panel” box (unless you want to only allow people in a Contact List to take the survey. If so, check it and choose your Contact List).
- **Check** the “Capture respondent identifying info” box.
- Change the **SSO Type** to Shibboleth.

**Under Capture respondent identifying info**, click on Add Embedded Data...
- In the first field, type **First Name** and then **FirstName** (no spaces) in the box next to it.
- Click on the green + icon and type **Last Name** and then **LastName** (no spaces) in the box next to it.
- Click on the green + icon and type **Email** and then **Mail** (no spaces) in the box next to it.
- Click **Save Flow** at the bottom.
If you want to prevent respondents from taking the survey more than once:

- Under Survey Options, click on “Prevent Ballot Box Stuffing” [Note: This will only prevent respondents from taking the survey twice in the same browser (e.g. Chrome). If they change browsers or computers, they will be able to take the survey more than once. Complete one of the other bullet points below to prevent this.].
- Send your survey to a Contact List via the Qualtrics email distribution.

If you want the survey to be completely anonymous (i.e. Qualtrics will not store any data about the respondent at all), click on “Anonymize Response” under Survey Options.

Follow-Up Options

If you used Qualtrics to email your survey to a Contact List, you can:

- Send respondents who did not take/finish the survey a reminder email by going to Distributions and clicking on “Schedule Reminder”.
- Send respondents who completed the survey a thank you message by going to Distributions and clicking on “Schedule Thank You Message”.

To send a thank you or custom message automatically after they complete the survey, go to Survey Options and click on “Custom end of survey message”. You can also click on “Send additional thank you email from a library” if you are using a Contact List.

To automatically redirect your respondents to a copy of their answer choices upon survey completion, go to Survey Options and click on “Redirect to single response report”.

Analyzing your Survey Results

Data and Analysis

- To download a spreadsheet of all participant answers, click on the project and then Data and Analysis.
- You can customize the spreadsheet on the screen by hovering over a column and clicking on the + button or by clicking on Tools in the right-hand corner and then Choose Columns.
- To delete or hide columns you do not want to see, click on the column name and choose Hide Column.
- You can download your data in three ways:
  - If you want to export the entire dataset, click on Export/Import, Export Data, and select Download.
  - If you want to download the data as it appears on the Data and Analysis screen, click on Export/Import, Export Data, uncheck the box next to “Download All Fields” and select Download.
  - To just view one participant’s answers, click on the drop-down arrow in their row under Actions and click on View Response or Export to PDF.
- Participants who have started and stopped a survey or only partially completed can be found under Responses in Progress in the top-right hand corner. To move these to the Recorded Responses, click on “Responses in Progress” and click on the Response ID to make sure it’s the
correct response you want to close. Then check the box next to the response row and at the top left, click on “With Selected”. Then choose “Close”. Confirm by checking the box and choose “Close 1 response”. You can close multiple responses by checking the boxes next to all the responses you want to close or by Closing/Pausing Response Collection of the entire survey, which will close all partially completed responses.

- You can add filters or under the Text tab, you can analyze qualitative data (this section is still a work in progress).

Reports

- To create reports that summarize your data (e.g. 50% of participants answered Choice A on Question #1), go to the project and click on Reports.
- Click on one of the questions on the left-hand side to see statistics in table and graph format. To add visualizations (e.g. a bar graph), click on Add Visualizations and choose the appropriate one on the right-hand side.
- Once you have finished customizing your report, click on Reports Options > Export Report. Choose the format you want and all the questions you want to include in the report. Then select Export Pages.
- You can also create reports under Printed Reports. However, collaborators will not be able to access these.

Share/Collaborate on Projects

- To allow others to view and/or edit your projects, go to the homepage and click on the drop-down arrow next to the desired survey.
- Choose Collaborate (Note: if that option is grayed out, it means you are not the original owner of the survey and cannot share it. You can ask the original owner to share it or make a copy of the survey and then share that one. Copies of surveys only include the survey questions and parameters, not any answers/results).
- Type in the person’s email address (they must have logged in to Qualtrics at least once to appear here). Choose the permissions you wish to grant them by clicking on the appropriate checkboxes.
- Click Save.

Copy Projects

- Users can copy a project by going to the homepage, clicking on the drop-down arrow next to the desired survey, and choosing Copy Project. They now have a copy of all the project questions and they own the copy. Note: it does not copy over participant answers and analyses.
- If the user needs to be the owner of the entire survey (answers and analyses included), they should contact Ruth Sprague.
- FYI: If you copy a survey, it retains the old title in multiple places. There are three places you may need to update:
  - Rename the project by going to the Project list, clicking the dropdown arrow on the right-hand side, and choosing Rename Project.
• Change the survey title that appears in the browser tab or window by going to Survey Options and changing the title under Survey Title.

• Change the header that appears at the top of every page by going to Look and Feel and changing the header in the Header section.
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Organize Projects

- To organize your projects, you can go to the homepage and click on Add Folder.
- Name your folder.
- Return to All Projects and drag and drop projects into the appropriate folder.
- If you ever have trouble finding a project, click on All Projects. Then use the Search Projects box on the top right to search by project name.
- You can star your important projects and sort your projects a variety of ways (including by starred survey, project name, or owner).

[For admins only: To change owners, administrators can go into Admin>User and search for the user. Click on the username and then choose “View Account Use Info”. Next to the desired survey under Actions, click on “Change Owner”.]