



# Creating Online Surveys with Qualtrics Survey Tool

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## Introduction

Qualtrics is web based software that allows the user to create surveys and generate reports without having any previous programming knowledge.

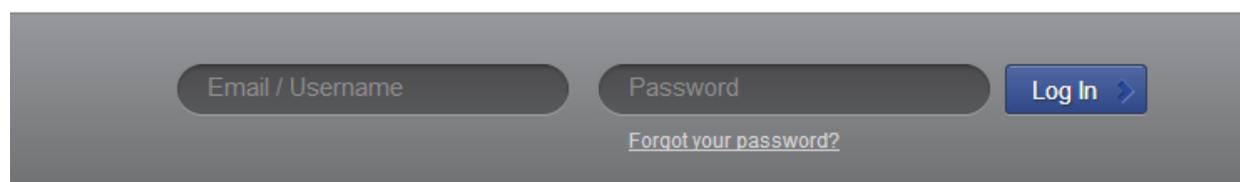
## Logging In

Qualtrics is available to all West Chester University faculty, staff and students.

1. To log into Qualtrics, type **wcupa.qualtrics.com** into the URL bar of your browser.
2. Then enter your West Chester University username and password.
3. Click **Log In**.

\*\*If you are a first time user, you will be required to **Accept Terms of Service**.

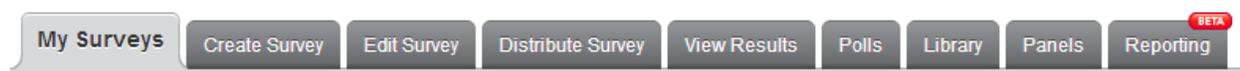
WEST CHESTER  
UNIVERSITY



The login form features a dark grey background. It contains two input fields: 'Email / Username' and 'Password'. To the right of the 'Password' field is a blue 'Log In' button with a right-pointing arrow. Below the 'Password' field is a link that says 'Forgot your password?'.

## Navigation

### My Surveys

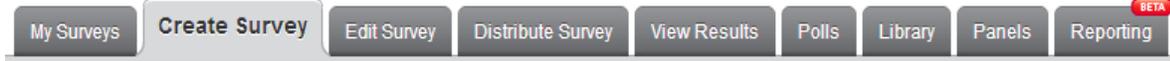


The My Surveys tab is essentially your homepage, containing the surveys you have created. These surveys can be organized by the number of responses collected and the date last modified by clicking on the titles at the top of the column. To **activate** a survey, click on the check box next to the left of the survey name under the Active column. The survey is active when a green check mark appears.



To the right of the survey name, under the **Task** column, there is a list of icons for each survey. Most of these icons serve as shortcuts to various tabs within Qualtrics. For example, clicking on the Edit icon will lead you to the Edit Survey tab.

## Create Survey



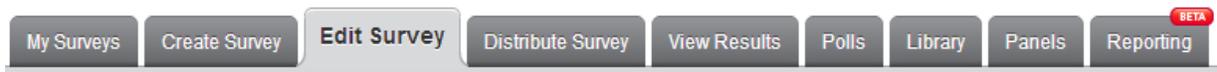
To create a survey, click on the **Create Survey** tab in the upper left hand corner of Qualtrics.

There are three ways to create a survey within Qualtrics.

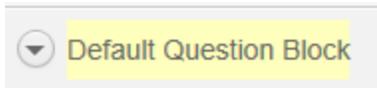
1. **Quick Survey Builder:** This is the most commonly used survey tool, allowing you to create a survey from scratch.
2. **Create from Copy:** Allows you to create a survey based on an existing survey
3. **Survey Library:** Allows you to choose a survey template from within Qualtrics.

Once one of the above options is chosen, and the survey is named the creator will be brought to the **Edit Survey** tab.

## Edit Survey



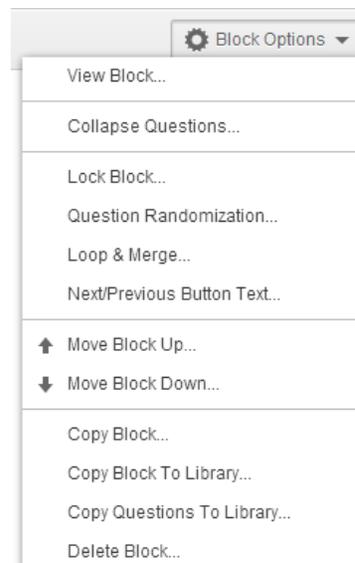
## Default Question Block



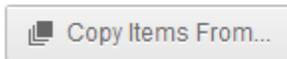
A question block is similar to a page within your survey. All surveys must contain at least one block. To **rename the page** double click on Default Question Block, on the upper left hand corner, and enter the new page title. Questions entered within the same block will appear on the same page. If there are a large amount of questions, you can add a block by clicking the **Add Block** button on the bottom right hand corner of the screen.

There are many editing options within the block. To view these options click on the **Block Options** button in the upper right hand corner. These options include:

- Question Randomization
- Loop and Merge
- Move Block Up or Down
- Copy Block
- Delete Block

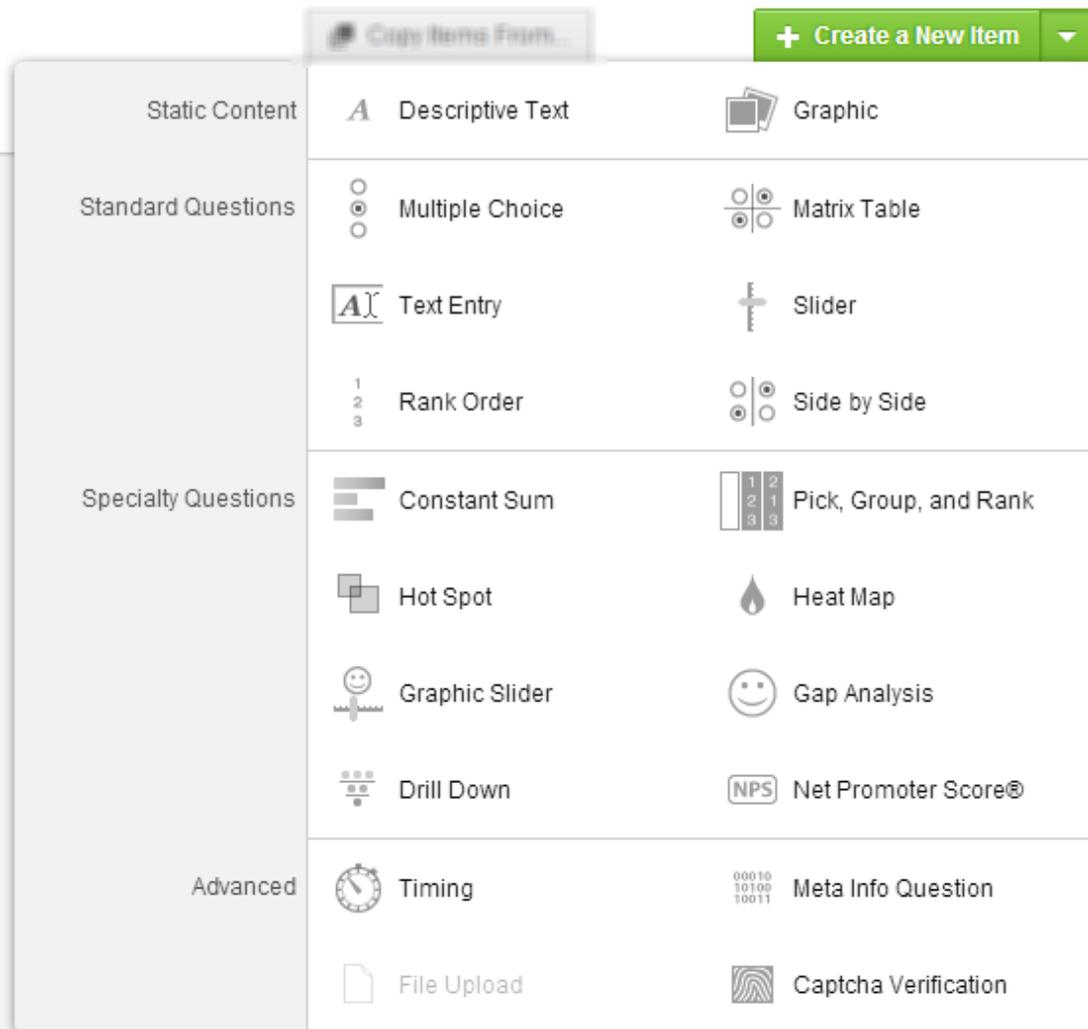


## Creating Questions



**Copy Items From:** Allows you to access questions from the Qualtrics library or other surveys you have created.

**Create a New Item:** By default, questions will appear in multiple choice format. To change the question type, select from the drop down arrow to the right of **Create a New Item**. **Note:** An example of each question type can be viewed by hovering your mouse over each choice.



## Mock Survey Questions

1. (Multiple choice) *“What is your gender?”* Then click outside of the title box.

**Note:** As you add questions to the survey, Qualtrics may recognize key words and automatically fill in answer choices. For example, when *“What is your gender?”* was entered, Qualtrics automatically entered *“Male and Female”* as answer choices. Each answer choice can be edited by clicking (highlighting) the answer option and renaming it.

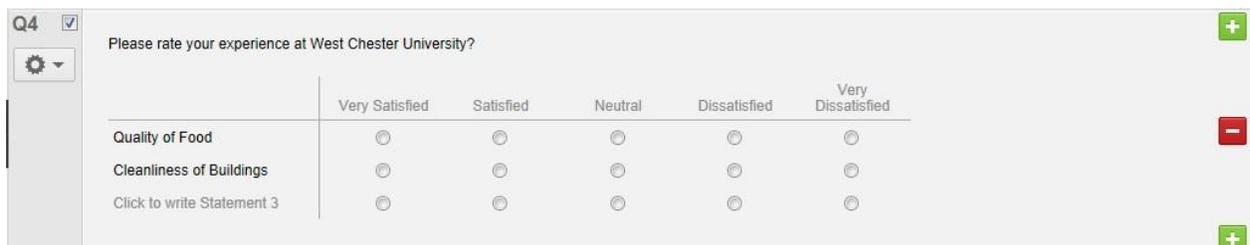
To add the next question, click on the bottom plus sign to the right of question #1. **Note:** Since the previous question was multiple choice, the following question will be multiple choice.

2. *“What is your position at the University?”* Qualtrics did not recognize this question, therefore automatic answer choices weren’t provided. Click on the first choice and type *“incoming student”*, for the second type *“current student”*, and for the third type *“graduate student”*.
3. For the third question, select the **Create New Item** option (highlighted in green) underneath the questions. Then select **Text Entry** from the dropdown. Title this question *“Please describe your experience at West Chester University.”* For this question type, the respondent will be given a text box in which they will type their experience.
4. For the fourth question, select the **Create New Item**. Then select **Matrix Table** from the dropdown. For the question title type *“Please rate your experience at West Chester University”*.

When question 4 is selected, a toolbar will appear on the right hand side. Under **Scale Points**, click the **plus sign** until it says 5. Notice that the table has adjusted.

Fill in the following:

Statement 1: Quality of Food  
Statement 2: Cleanliness of Buildings  
Statement 3: Student Involvement  
Scale point 1: Very Satisfied  
Scale point 2: Satisfied  
Scale point 3: Neutral  
Scale point 4: Dissatisfied  
Scale point 5: Very Dissatisfied



The screenshot shows a survey question titled "Please rate your experience at West Chester University?". The question is set to a Matrix Table type. The table has three rows and five columns. The columns are labeled "Very Satisfied", "Satisfied", "Neutral", "Dissatisfied", and "Very Dissatisfied". The rows are labeled "Quality of Food", "Cleanliness of Buildings", and "Click to write Statement 3". Each cell in the table contains a radio button. On the right side of the table, there is a toolbar with a plus sign at the top, a minus sign in the middle, and another plus sign at the bottom.

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Quality of Food	<input type="radio"/>				
Cleanliness of Buildings	<input type="radio"/>				
Click to write Statement 3	<input type="radio"/>				

To view the survey created click **Preview Survey** under the Edit Survey tab.

**Note:** The survey will appear in a new tab.



## Adding and Removing Questions

When a question is selected, plus and minus signs will appear on the right side of the screen. To **add a question** above the selected question, click on the upper plus sign. To add a question underneath the selected question, click on the lower plus sign. To **delete a question** all together, click on the red minus sign.

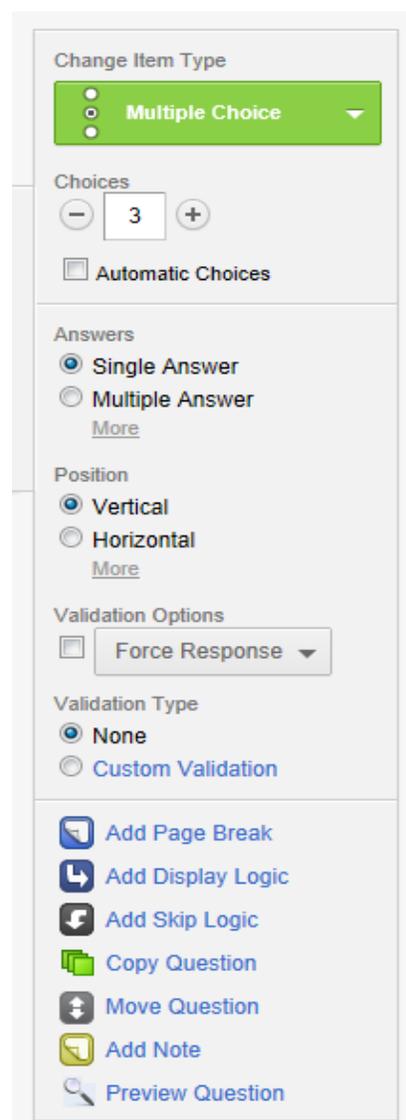


## Edit Questions

To edit a question, simply click on the question itself. Once a question has been selected, a toolbar will appear on the right side panel. This toolbar will provide a variety of options according to the question type selected. For example, a multiple choice question allows you to adjust the number of answer choices provided. You can also select whether a single answer or multiple answers can be chosen. For all question types, you can require the respondent to answer the question via **Validation Options**.

To edit the **question title**, click on the title to rename it. **Question answers** can also be edited by clicking on the answer choice and renaming it. To allow text entry as an answer choice, click on the drop down next to the answer choice and select **Allow Text Entry**. This will allow the respondent to type in an answer, rather than choosing from your given options. To insert an image or graphic as an answer choice, choose **Insert Graphic** from the drop down next to the answer choice. Then choose a graphic from the library or upload a new graphic (in the upper right hand corner).

The question style can be edited by clicking on the title and selecting **Rich Content Editor**. You can view each question in **HTML View** or **Normal View** by clicking on the question title and selecting each option in the right hand corner.



## Question Numbering

Questions are numbered in the order they were added to the survey. Note: When the question placement changes, question numbering will not automatically update. This does not have any effect on the survey order itself since the order is based on the visual layout of the questions, not their numbers.

Qualtrics allows you to **Re-number** your questions so that they are in order. This is beneficial when it comes to exporting survey data into Excel. To renumber the questions:

1. Go to the **Edit Survey** tab for the survey you wish to re-number
2. Click the **Advanced Options** drop-down in the upper right corner and select “**Auto-Number Questions**”
3. Then choose how you wish to number the questions.

## Moving Questions

Questions can be moved throughout your survey multiple ways. As previously stated, a toolbar on the right appears when a question is selected. Towards the bottom of this toolbar, there is a **Move Question** option. Move your mouse to where you would like the question to appear, then click. To move **multiple questions**, check the small box next to the question number, then click on the double headed arrow to the left of the question.

## Trash/Unused Questions

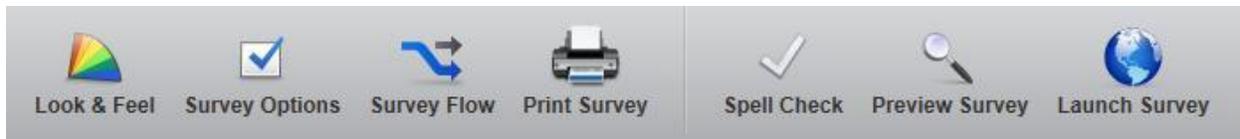
Questions that are deleted from the survey will appear in the Trash/Unused Questions section at the bottom of all questions. You can use a question that has previously been deleted as long as you have not emptied the trash. Select the desired question, and click **Restore** to bring the question back into your survey. Then move the question as needed.

To empty the trash, click **Empty Trash** in the upper right hand corner of the section. A confirmation dialogue box will appear. Then select **Yes** or **No**.

## Locked Survey

If the survey already has respondents, the survey will appear **locked**, when editing, to prevent invalidation of the collected responses. The survey can be unlocked by clicking on the “i” button to the left of the lock.





**Look and Feel:** Edit the theme of the survey.

General: Add next and back button, add progress bar, edit number of questions per page.

Fonts: Change font style, size, change question text, change choice text

Colors: Change the color of the text, borders, background, header, footer, etc.

Advanced: Edit header and footer, edit external CSS or add custom CSS

### **Survey Options**

Survey Experience:

Back Button: Enable respondents to change their responses

Show Question Numbers: shows question numbers

Survey Language: Edit the language the survey is written in

Survey Protection:

Password Protection: A password must be entered to take the survey

Prevent Ballot Box Stuffing: Stops users from taking a survey more than once

Survey Expiration: The survey will only be available for a specific date range

Partial Completion:

Set how long to wait before partially completed responses are closed and data is recorded.

Response Set:

Allows you to place survey responses into different buckets. This allows you to view results of the same survey for different collection periods.

### **Survey Flow**

Allows you to move, duplicate, and delete question blocks.

### **Print Survey**

Use this button to create a hard copy of the survey or convert the survey to PDF

### **Spell Check**

Use this feature to proofread your survey before sending it to potential respondents

**Preview Survey**

Allows you to see and take the survey as if you were a respondent

**Note:** The survey will appear in a new tab. To go back and edit your survey click back to the other tab within your browser.

**Launch Survey**

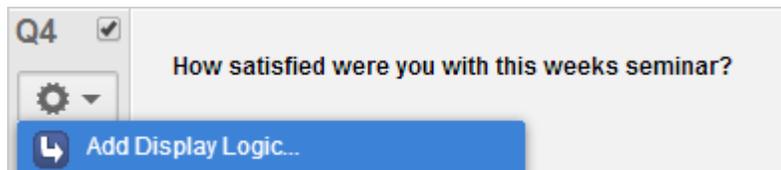
Brings you to the Distribute Survey tab where you can send the survey to respondents

## Display Logic

Display logic helps you create a survey relevant to your respondents by displaying or hiding certain fields based on answers selected.

To set up Display Logic:

1. Select **Add Display Logic** from the **Advanced Question Options** dropdown under the question you wish to hide or display.



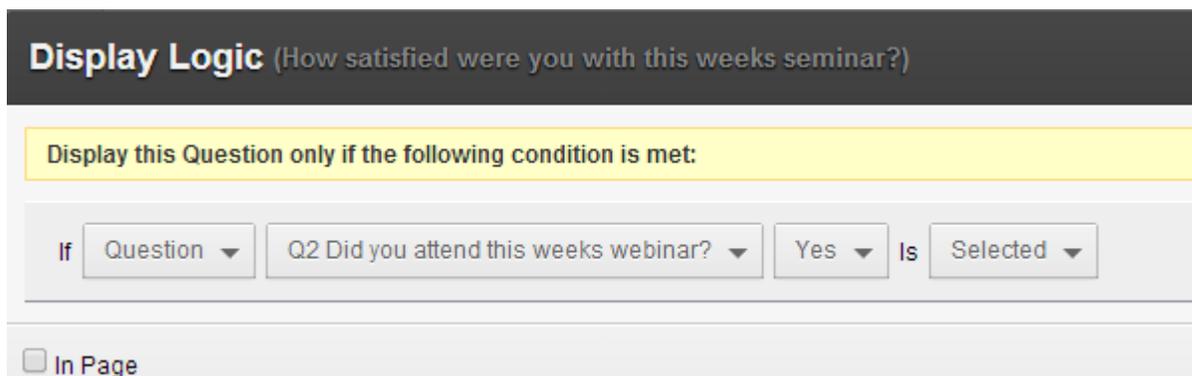
2. Set the condition that must be met for the question to display. The condition can be based on any of the following:

**Previous Question:** Display a question according to the respondent's specific answer to a previous question.

**Embedded Data:** Use any other information you have stored about the respondent to determine whether or not a question is shown. For example, only display a question to those who have an Embedded Data Age field equal to 25.

**Quota:** Once a Quota has been created, you can set a condition based on whether or not the quota has been met.

**Panel Field:** Base the condition on information already stored in a Panel Field, such as First Name, Last Name, or Primary Email.

A screenshot of the 'Display Logic' configuration screen. The title is 'Display Logic (How satisfied were you with this weeks seminar?)'. Below the title, there is a yellow box with the text 'Display this Question only if the following condition is met:'. Below this, there is a row of dropdown menus: 'If' followed by 'Question', 'Q2 Did you attend this weeks webinar?', 'Yes', 'Is', and 'Selected'. At the bottom, there is a checkbox labeled 'In Page'.

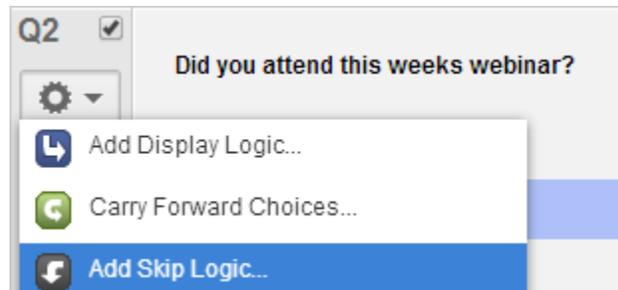
3. Click **Save** to apply the logic.

## Skip Logic

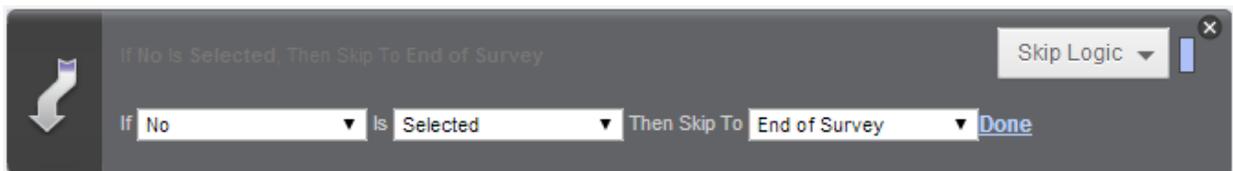
Skip logic creates a custom path through the survey that varies based on a respondent's answers. This option is usually used when multiple answers are to be skipped.

To set up Skip Logic:

1. Select the question to which you would like to add Skip Logic.
2. Select **Add Skip Logic** from the **Advanced Question Options** drop-down.



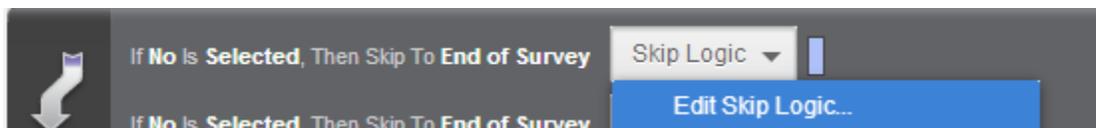
3. Select the **answer choice** to use in the first drop-down. Then select where the respondent will be **redirected** in the last drop-down.



4. Click **Done** to apply skip logic.

## Edit Skip Logic

Allows changes to be made to the skip-logic statement.



## Delete Skip Logic

To delete Skip Logic select **Remove Skip Logic** from the **Skip Logic** drop-down.

## Advanced Options

### Strip Formatting

Allows you to remove all text formatting from questions and return them to default.

### Auto-Number Questions

Allows you to automatically renumber your questions. Remember that these numbers will not appear to the audience.

### Triggers

A trigger can be used to send an email message to yourself or others each time a survey is completed.

### Quotas

Set based on responses to a question or based on embedded data.

### Translate Survey

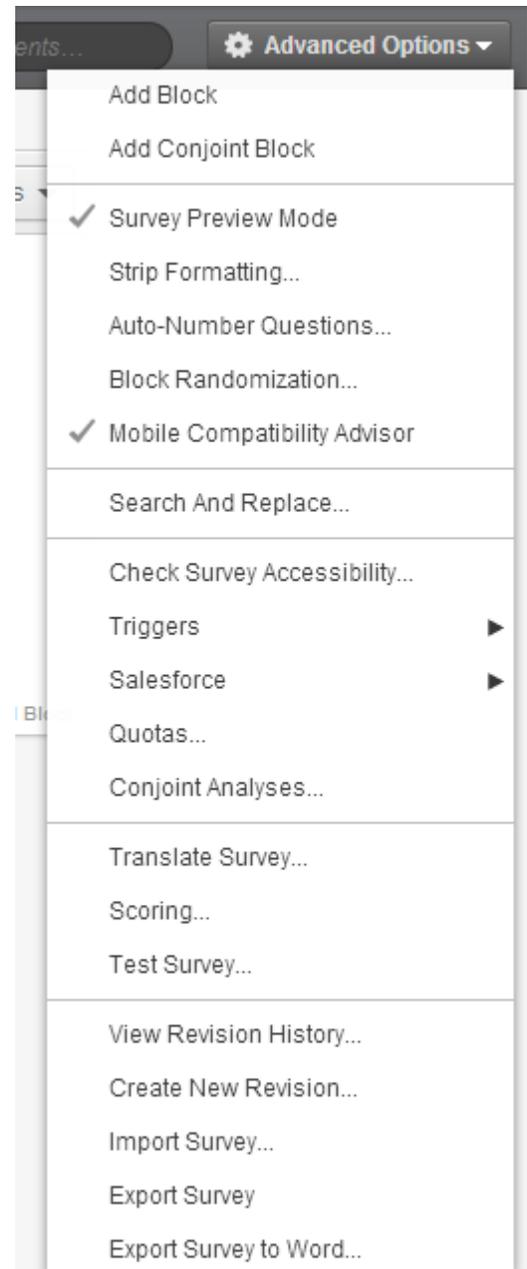
Allows you to create foreign translations of your question and answer choices, either using "google translate" or by typing your own translations.

### Scoring

Scoring allows you to set point values for multiple choice, matrix, and text entry questions.

### Test Survey

Allows you to generate responses to your survey before you actually collect data.



## Export Survey

Download your survey as a .QSF file to use as a backup file. Or download a Word document which you can use for a paper version of the survey or as a reference sheet for the coded values of your answer choices.

To export your survey:

1. On the Edit Survey page, select **Advanced Options**.
2. Select **Export Survey** or **Export Survey to Word**.
3. Select to **Download** or **Save** the file in the browser download box (with Internet Explorer, you might need to click on the yellow bar at the top of the page to give it permission to download the file).

## Import Survey

To import a survey, simply open the Advanced Options menu on the Edit Survey page and select to Import Survey. There are two options for importing a survey.

1. .QSF – This would be a survey you had created and exported, or that someone else had created and sent to you. The survey will import without any further formatting.
2. .TXT – The text file option is appropriate in an automated system, where you have a back-end program that automatically generates .TXT surveys for you to import. Generally, if you are creating surveys yourself or bringing a survey in from another survey platform, it is quicker and easier to simply recreate it within Qualtrics.

## Distribute Survey



**Survey Link:** Provides the URL link which you can copy and paste to your audience

**Email Survey:** Allows you to send your survey to future respondents in an email.

**Email History:** Displays the status of emails and surveys distributed

**Social Media:** Allows you to post the survey link to a social media site

**In-Page Popup:** Used to display a link to website visitors in a popup

**Website Feedback:** Allows you to add a survey feedback link to a website

**Survey Director:** Simplifies survey distribution by using one static link to distribute several different surveys

**Sample Finder:** Screens respondents based on your set respondent criteria

## View Results

**View Reports:** Where the initial report can be viewed or a new report can be created. Click **Initial Report** to view report. Then, select a question from the **Questions** tab on the left panel to view report.

Report Name	Creation Date	Last Modified	Owner	Delete
<a href="#">Initial Report</a>	Feb 27, 2014	Mar 17, 2014	[blurred]	<a href="#">Delete</a>

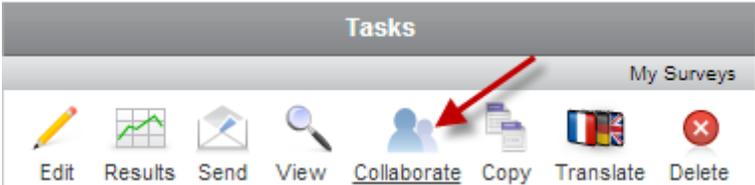
**Responses:** Allows the user to view recorded responses and responses in progress. Responses can be viewed according to response type, date, name and email address.

**Download Data:** Allows the survey data to be downloaded by date as an email, .zip file, CSV., etc.

**Cross Tabulation:** Provides a way of analyzing and comparing the results for one or more variables with the results of another.

# Collaborate

Collaborating gives you the ability to share and edit surveys with other users. To collaborate with other users, click on the **Collaborate** icon under the tasks menu on your homepage. To share the survey, enter their username. If the individual is not a Qualtrics member, an email address can be entered. Then press **Save**.



## Accepting Shared Survey

When another user sends a survey to collaborate, a code will be provided. Enter this code into the textbox under **Accept Shared Survey**. Select **Accept**.

