

# An Introduction to Qualtrics

Alliant Library, Spring 2011

## 1. Creating an account

- ❖ Go to [www.qualtrics.com](http://www.qualtrics.com) and click on “Free account”
- ❖ Type in your Alliant email address (you must use this email address) and create a password. You should receive an email from Qualtrics confirming your account.

The screenshot shows the Qualtrics website with a sign-up modal open. The modal has the title "Try Qualtrics Free in Seconds" and contains the following fields and buttons:

- Email Address** (This will be your user name): A text input field.
- Password**: A text input field.
- Re-Type Password**: A text input field.
- Google** button: A button with the Google logo and the text "Or sign up with Google".
- GET STARTED!** button: A red button.
- What's included?** link: A small red link.

The background of the website shows the Qualtrics logo, navigation links like "SURVEY RESEARCH SUITE", "ADDITIONAL PRODUCTS", and "ABOUT", and a sidebar with "Discover" and "100+ QUESTION TYPES".

## 2. Creating your survey

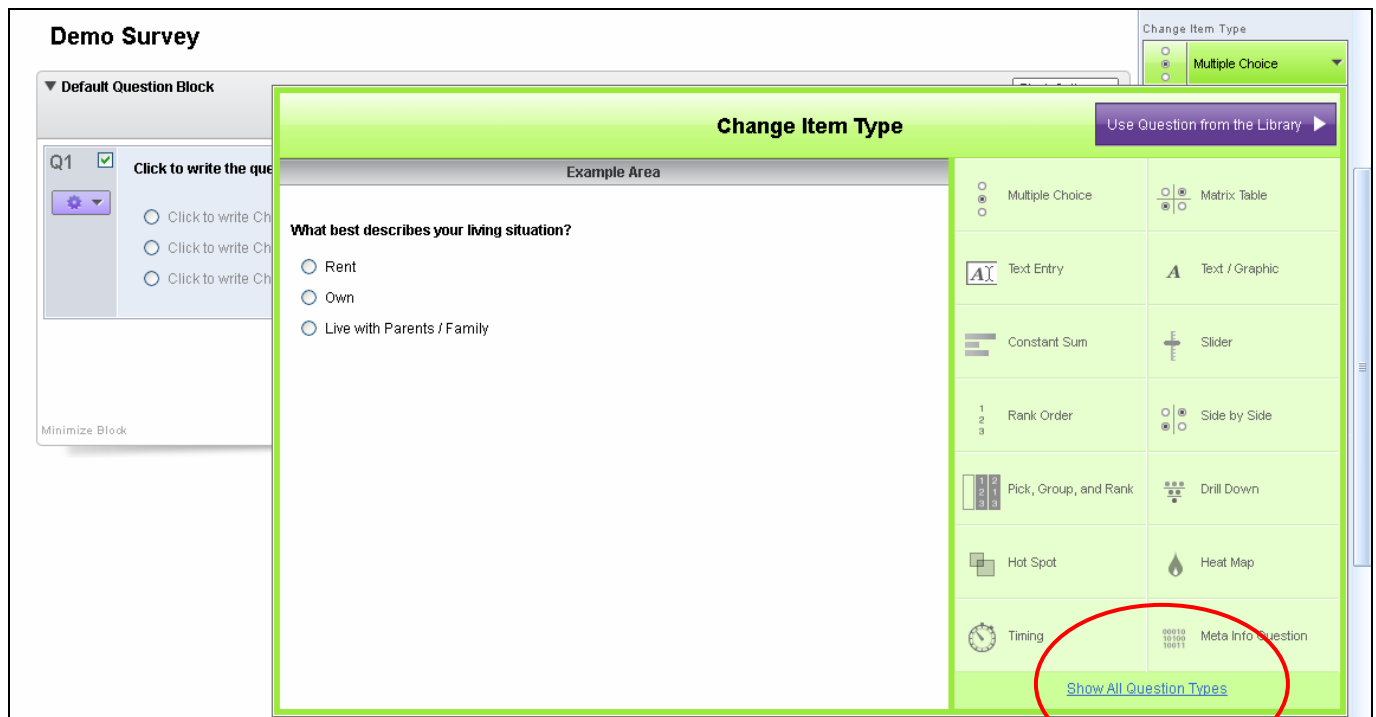
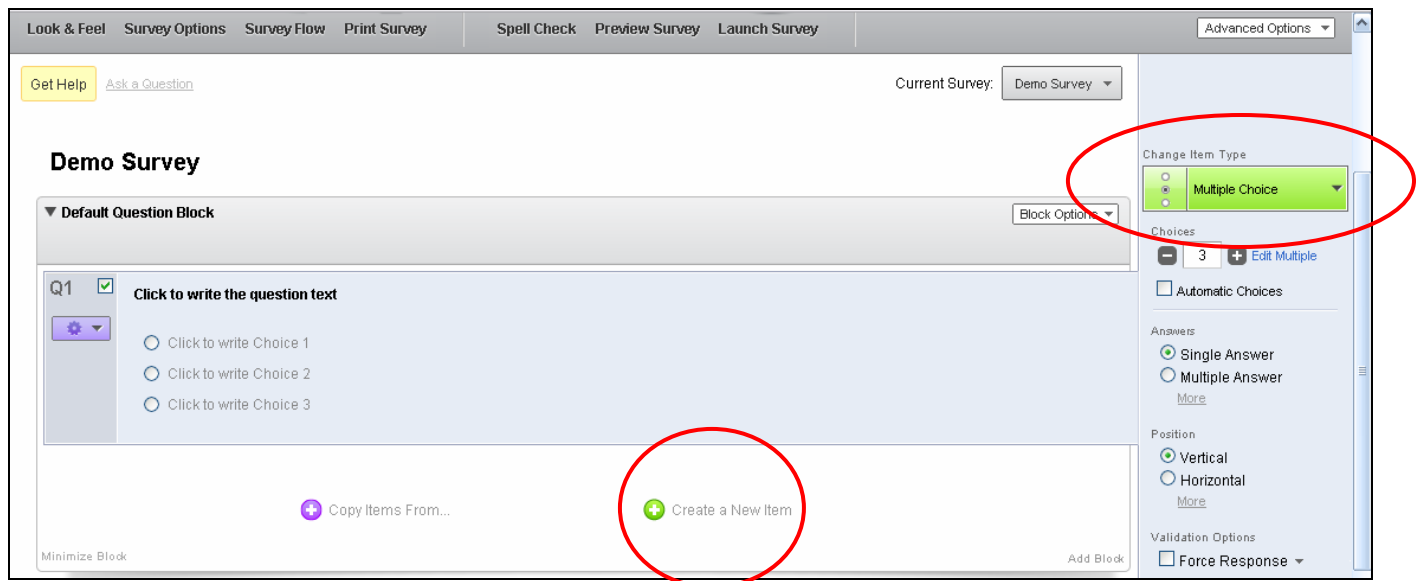
- ❖ Once you have created your account, login at <https://alliant.qualtrics.com/> using your Alliant email as your username.
- ❖ Near the top left of the screen, click “Create survey” then click “Quick survey builder”
- ❖ Name your survey and click “Create survey.”

The screenshot shows the Qualtrics "My Surveys" dashboard. At the top, there is a navigation bar with tabs: "My Surveys", "Create Survey", "Edit Survey", "Distribute Survey", "View Results", "Polls", "Library", and "Panels". Below this is a toolbar with icons for "Create Survey", "Email Survey", "View Results", and "Message Center". The "Create Survey" icon is circled in red. To the right of the toolbar is a "Survey Search..." input field and a "Show More Data" button. Below the toolbar is a table of surveys:

★	Active	Name	Responses	Tasks
★	<input type="checkbox"/>	Alliant Library Use Survey 2011 Modified on: Apr 13, 2011	502	Edit Results Send View Collaborate Copy Translate Delete
★	<input checked="" type="checkbox"/>	Information Literacy Skills of Incoming Alliant Graduate Students Modified on: Oct 18, 2011	4	Edit Results Send View Collaborate Copy Translate Delete
★	<input checked="" type="checkbox"/>	Alliant Plagiarism Tutorial Quiz Modified on: Jul 15, 2011	106	Edit Results Send View Collaborate Copy Translate Delete
★	<input checked="" type="checkbox"/>	Research Right Registration Modified on: Oct 20, 2011	24	Edit Results Send View Collaborate Copy Translate Delete

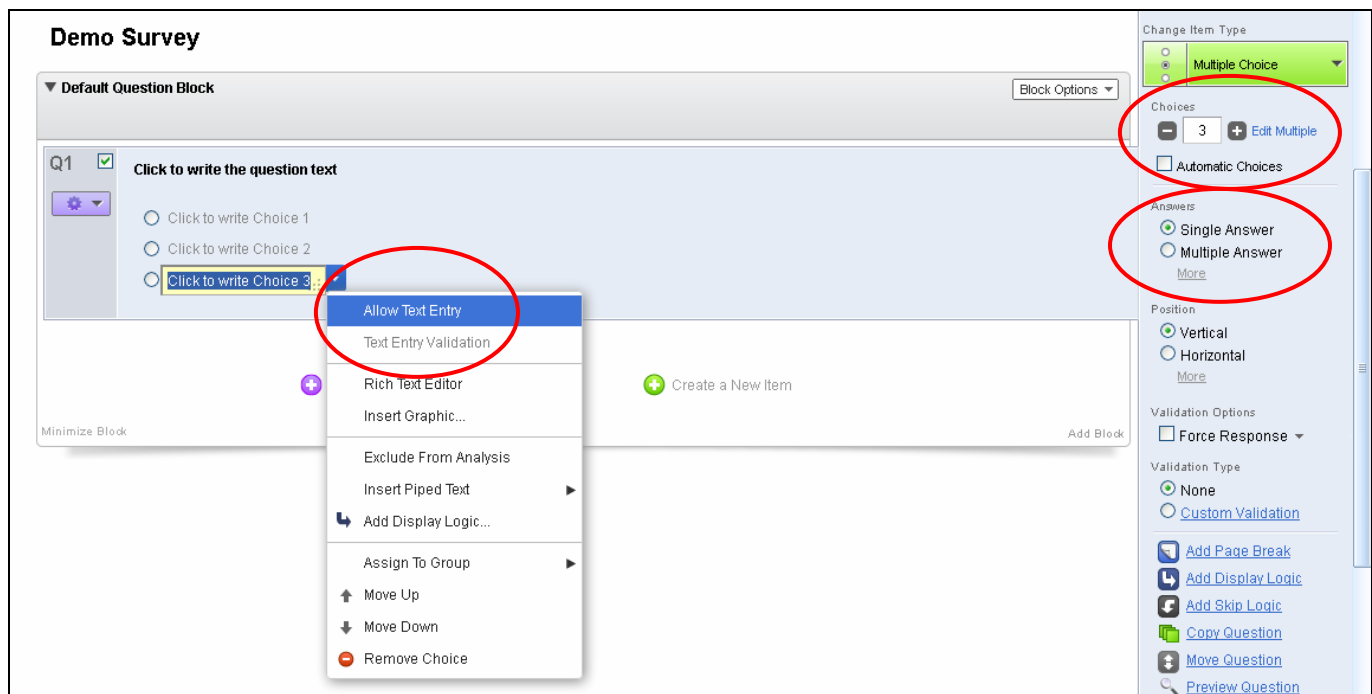
### 3. Adding/Formatting Questions

- ❖ Click next to the green + symbol “Create a New Item” and a blank format will pop up.
- ❖ On the right side of the screen you may select different formats for questions.
- ❖ Click on the green box labeled, “Change Item Type” and a menu will appear with a number of different formats. For additional formats, click at the bottom of the menu where it says, “Show all question types”
- ❖ Scroll down to view all the different formats for questions and choose what is most applicable for your survey



#### 4. Multiple Choice/Likert Questions

- ❖ To change the number of choices offered, look to the right side of the screen and you may use the + or – symbols to increase or decrease the number of choices, or you may enter the number in the box.
- ❖ If you want to allow more than one answer in a “check all that apply” type of question, select “Multiple answer” on the right side of the screen.
- ❖ If you have a multiple choice question, with an “other” choice and would like the participant to be able to specify what “other” is, you may enter a text box next to a multiple choice response by clicking on the choice and selecting the down arrow to the right of the choice. A menu will pop up, select “Allow text entry” and a blank text box should appear below the choice.
- ❖ To select a Likert-scale question: Click on “Change Item Type” (Green box on the right side), then “Show all question types” and scroll down until you find “Matrix” and select the “Likert” question (single or multiple answer) that you wish to use.



#### 5. Vignettes or other free text entry

- ❖ If your study uses a vignette or other text entry, you may select “Text/Graphic” as a question type. The question will just appear as text.
  - ❖ If you do not want participants to have access to the vignette while answering subsequent questions, you have two options:
    - On the right side, select “Add page break” which will direct the participant to the following page.
    - In the bottom right hand corner of the question box, you may select “Add block” which will also direct the participant to the following page.
- \*\*Note:** By selecting “Add block” you will have the ability to randomize or control the order of blocks throughout your survey, depending on your design. Page breaks will only direct the participant to the subsequent page.

## 6. Other options and settings

- ❖ If you do NOT want participants to use the “Back” button (especially for vignettes and other HPPC concerns) look to the top of the page and select “Survey options.” Make sure that the first item the “Back” option is **UNCHECKED**. This will ensure that participants cannot use the back button. Within this menu, you may select other options (i.e. security, thank you messages, etc.) that you would like to apply to your study. Make sure you “Save Changes”

**Survey Options**

**Survey Experience**

- ☐ **Back Button.** Enable respondents to change their responses.
- ☒ **Save and Continue.** Allow respondents to save and continue later.
- ☐ **Show Export Tags.** Helpful for survey collaboration.
- ☐ **Use Custom Survey Validation Messages...**

**Survey Language:** English The language the survey is written in.

**Survey Title:** Survey | Qualtrics Survey Software This text will appear in the browser as the window or tab title.

**Meta Description:** Survey Software, Enterprise Survey Search engines and social media services use this description.

**Survey Protection**

- ☒ **Open Access.** Allow anyone to take this survey.
- ☐ **By Invitation Only.** Allow only those who receive invitation emails to take the survey (this will reject anonymous links).
- ☐ **Password Protection.** This password must be entered to take this survey.
- ☐ **Prevent Ballot Box Stuffing.** Keep people from taking this survey more than once.
- ☐ **HTTP Referrer Verification.** The user must come from this URL to take the survey.
- ☐ **Prevent Indexing.** A tag will be added to the survey to prevent search engines from indexing it.
- ☐ **Survey Expiration.** The survey will only be available for a specified date range.

**Survey Termination**

- ☒ **Default** end of survey message.
- ☐ Redirect to single response report.
- ☐ End of survey message from a **library...**
- ☐ **Redirect to a URL** full URL, ex: "http://www.qualtrics.com".
- ☐ Send additional thank you **email** from a library...

**Cancel** **Save Changes**

- ❖ If you want to make sure that participants answer a question before moving on, click on the question and look to the right side, check the “Force response” box. By selecting this option, participants must answer the question before allowing them to move on to the next question.

**Q6** ☒ **Click to write the question text**

- ☐ Click to write Choice 1
- ☐ Click to write Choice 2
- ☐ Click to write Choice 3

**Validation Options**

- ☒ **Force Response**

**Validation Type**

- ☒ **None**
- ☐ **Custom Validation**

**Add Page Break**

**Add Display Logic**

**Add Skip Logic**

**Copy Question**

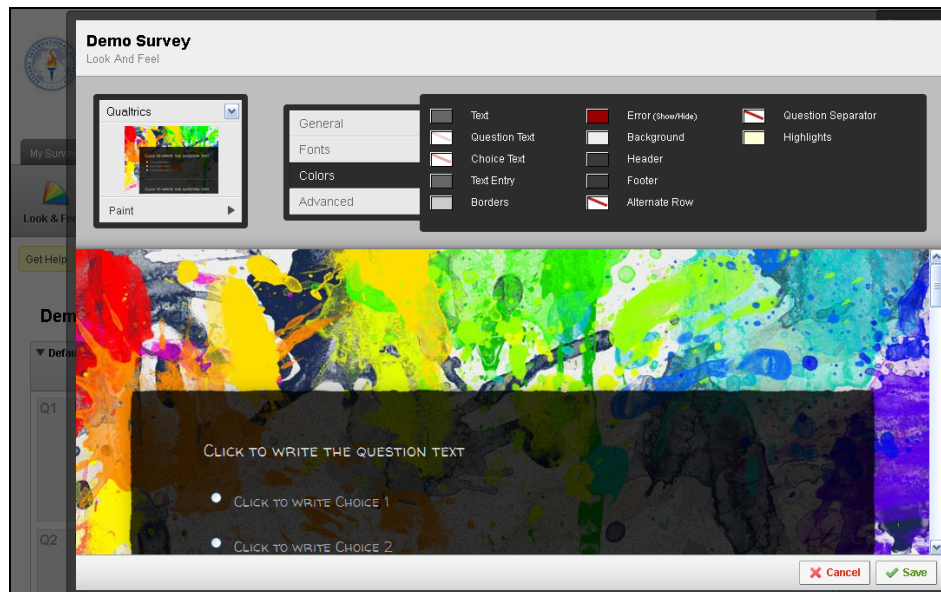
**Move Question**

**Preview Question**

**Copy Items From...** **Create a New Item**

**Minimize Block** **Add Block**

- ❖ To change the color scheme of your survey, add header/footer or edit the font type/size of your text, select “Look & Feel” at the top of the page.

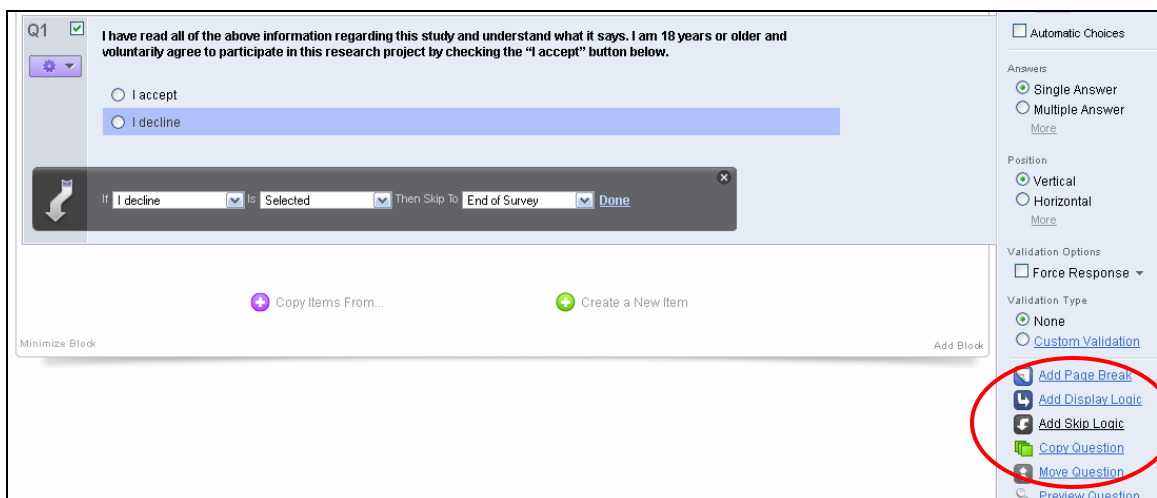


- ❖ Important for IRB (HPPC): The online informed consent template requires that if a participant does NOT agree to informed consent, they must be directed to the end of your survey. For example, the last item in your informed consent could look like this:

I have read all of the above information regarding this study and understand what it says.  
I am 18 years or older and voluntarily agree to participate in this research project by checking the “I accept” button below.

- I accept
- I decline

For this question, click, “Add skip logic” (on right side of screen). A menu will appear with the following equation: If “I decline” is “selected” then “skip to end of survey.” This will ensure that participants who do not agree to informed consent will be unable to take your survey. (You may also use skip logic to direct participants to different “blocks” of questions based on their answers to specific questions.)



## 7. Activating and Distributing your Survey

- ❖ Click on the “Distribute survey” tab at the top of the page, then click “Activate your survey to collect responses.” Qualtrics provides you with a link, which you may email/post to recruit and will direct participants directly to your survey.

**\*\*IMPORTANT:** If you choose to preview your survey before activating it, Qualtrics automatically records the responses and will add them to your results. To delete these responses before collecting data, go to the “View results” tab at the top of the page, then click “Delete” report (this will only delete responses from survey previews, NOT the survey questions).

The screenshot shows the Qualtrics control panel interface. At the top, the Alliant International University logo is visible. The navigation bar includes tabs for My Surveys, Create Survey, Edit Survey, **Distribute Survey**, View Results, Polls, Library, and Panels. Below the navigation bar, there are icons for Survey Link, Email Survey, Email History, Social Media, In-Page Popup, Website Feedback, Survey Director, and Preview Survey. A purple banner across the middle of the page reads: "Need more respondents? Use the Qualtrics Panel. [Click here](#) to get a quote." Below the banner, the main content area displays "Survey Is Not Active" with a yellow "Get Help" button and a link to "Ask a Question". A "Current Survey: Demo Survey" dropdown is in the top right. The central message is "Survey Is Not Active" followed by a blue link "Activate your survey to collect responses" with a right-pointing arrow. Below this, it states "Your survey is inactive for the following reasons:" and lists three bullet points: "Quality Control" (The survey cannot be taken by recipients and allows you to review it before it can be taken.), "Ease of Building" (In "Edit Survey" you have access to quick and simple build modes that are not available with active surveys.), and "Data Integrity" (Since no one can take an inactive survey you don't need to worry about invalidating your data. Once data has been collected you must be careful not to invalidate results when modifying the survey.). At the bottom, it states "A survey should not be activated until you are ready to collect responses from recipients."