



University
of Glasgow

Introduction to Qualtrics

(V1.0)

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Introduction

Qualtrics offers a powerful web based application that allows you to create surveys and collect responses.

This course seeks to offer an introduction to the Qualtrics application and demonstrate how to create a basic survey

Within this course we will design a survey, publish and distribute it. We will then look at what we can do with the data generated by survey respondents.

Objectives

On successful completion of this course participants will be able to:

- Create a survey using Qualtrics
- Add question blocks and modify their properties
- Add questions of varying types and modify their properties
- Add questions from Qualtrics library of questions
- Save Versions of a Qualtrics survey
- Preview and Test a Survey
- Add branching to a survey based on a respondents answer
- Alter the appearance of a survey to include Logos, background images and customised colours
- Publish a survey
- Distribute a survey
- Export data from a survey
- Create a visual report

Introduction to Qualtrics

1 Introduction to Qualtrics

Welcome to our course on Qualtrics, a powerful tool for creating and analysing surveys. In this course, you will learn how to set up a Qualtrics account, create and design surveys, distribute them to collect responses, and analyse the results. We will also cover some advanced features and best practices for using Qualtrics.

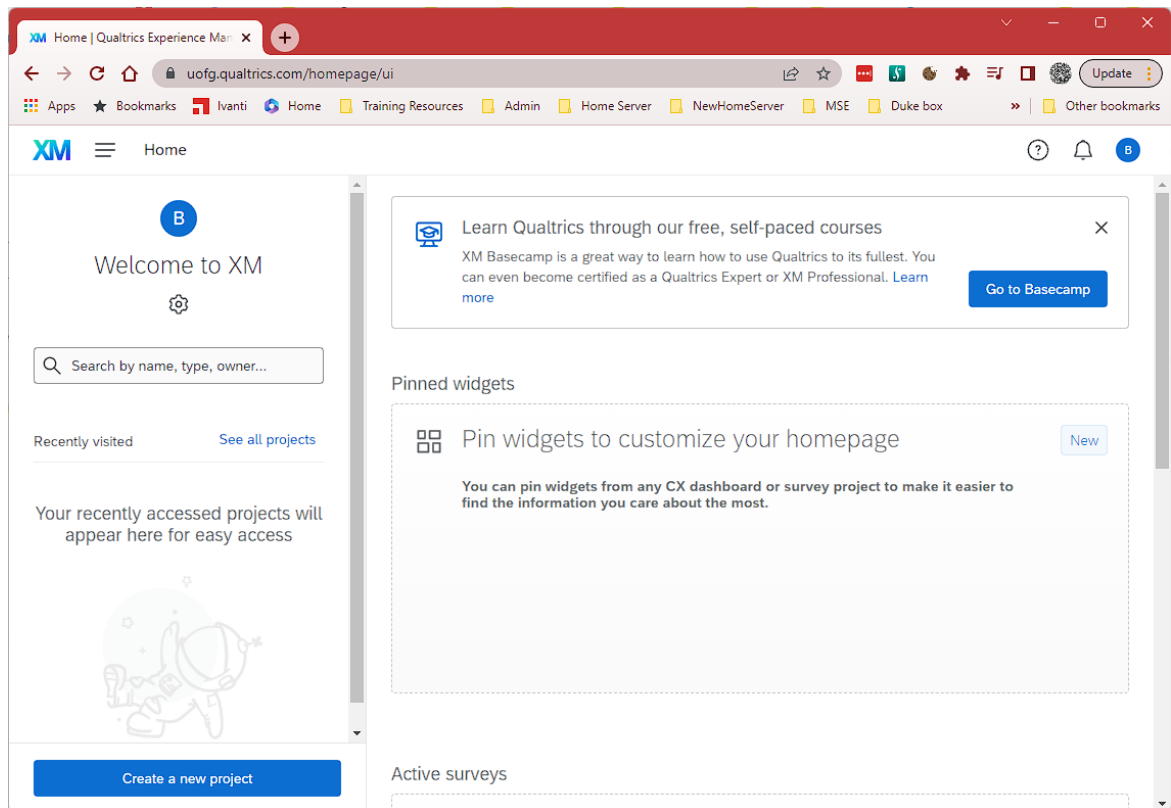
a. What is Qualtrics and why is it used?

First, let's start by introducing Qualtrics and why it is used. Qualtrics is a survey software that allows you to create and conduct surveys online. It is widely used in academia, market research, and other fields to collect and analyse data from participants. With Qualtrics, you can create surveys using a variety of question types, customize the look and feel of your survey, and view and analyse the results in real-time.

b. Setting up a Qualtrics account and navigating the interface

To get started with Qualtrics, you will need to log in with your university account. To log in visit <https://uofg.qualtrics.com/> and log in using your GUID and account password

Once you have logged in you will be resented with the following screen



The main menu on the left side of the screen allows you to access different parts of the platform, such as the survey editor, results, and settings. There will be a list of projects here once you have created them

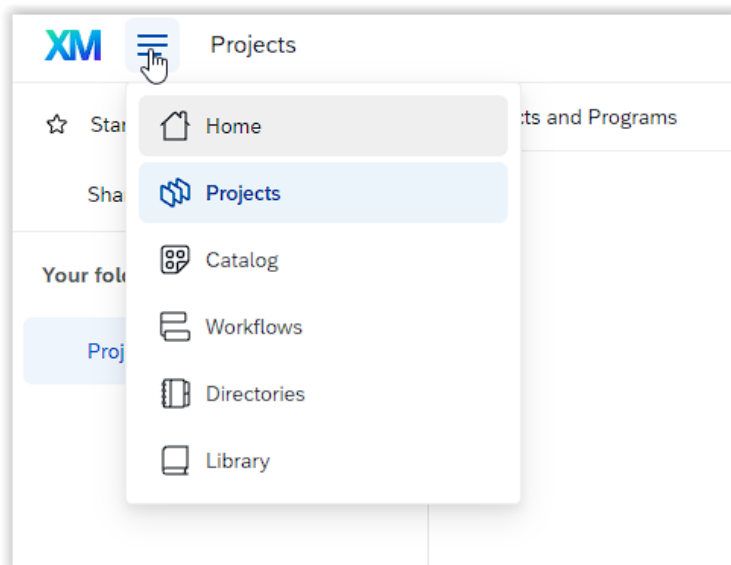
2 Creating a Survey

First step in creating a survey is to plan and design it. Think about the purpose of your survey, who your target audience is, and what information you want to gather. Next, you can start adding questions to your survey. Qualtrics provides a wide range of question types, including multiple choice, open-ended, and rating scales. You can also add images, videos, and other media to your survey. Once you have added all of your questions, you can format the survey to match your branding or style.

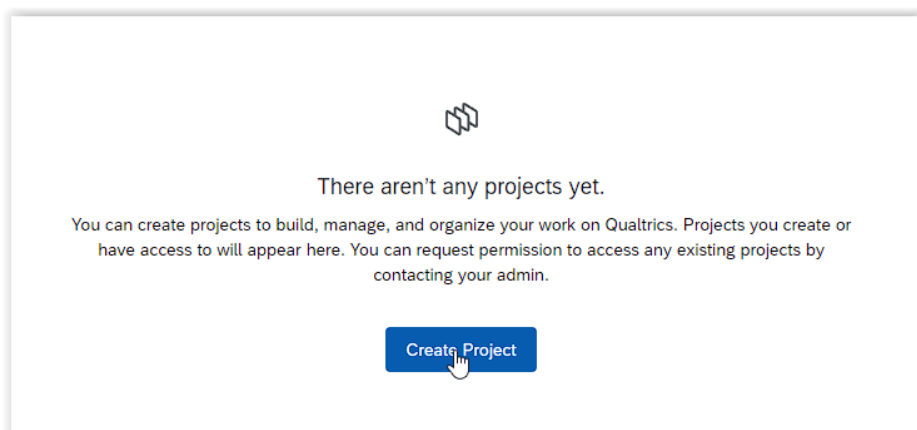
a. Create a project in Qualtrics

- 1 Log in to your Qualtrics account.

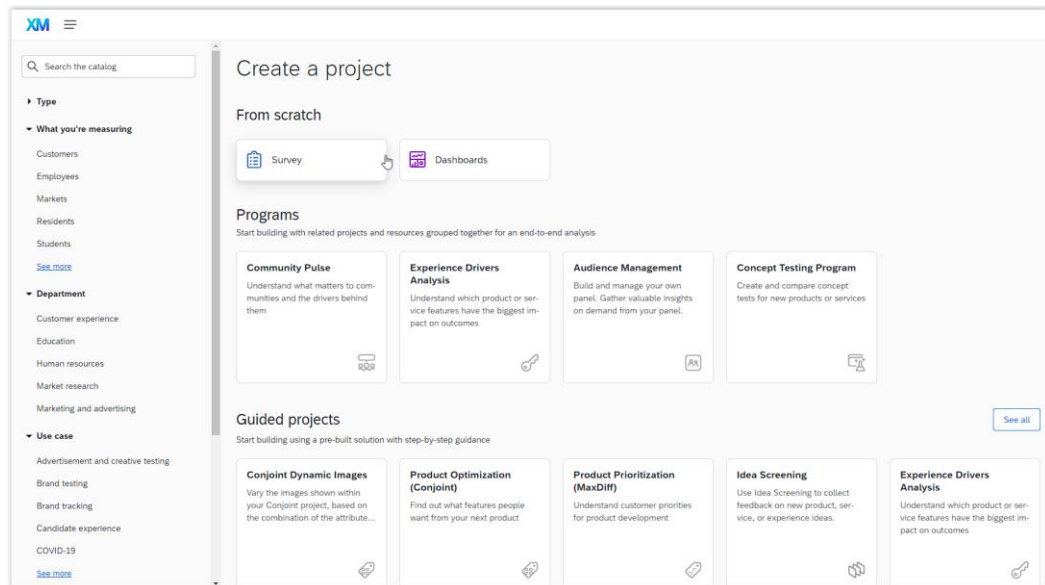
- 2 From the menu on the top left of the interface click Projects



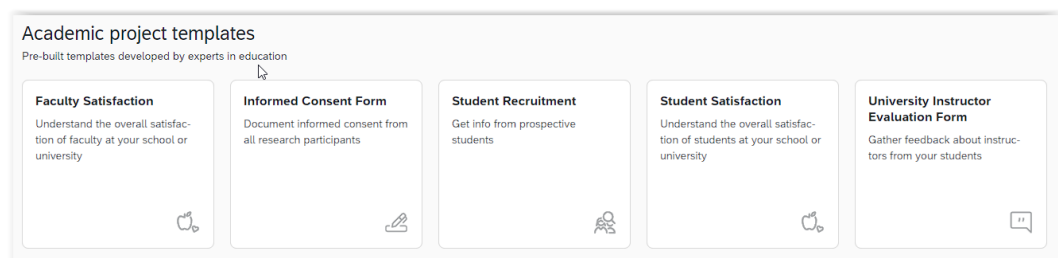
- 3 Click the "Create Project" button.



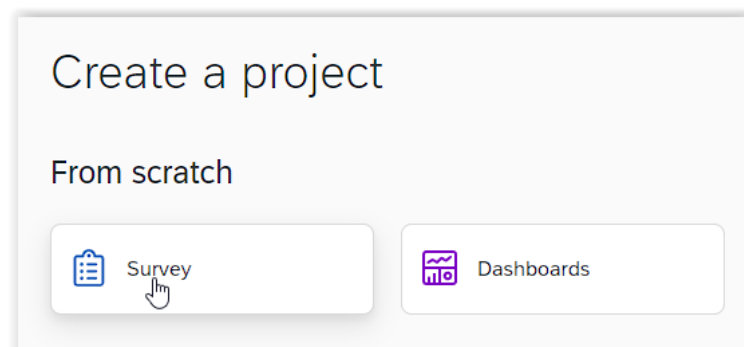
The interface will change to the **Create a project page**



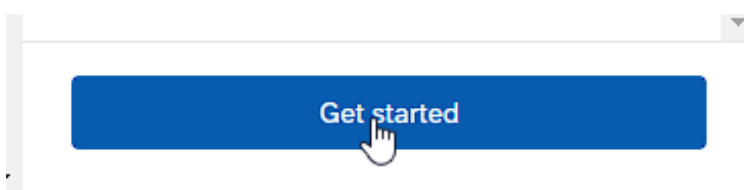
- 4 Look through the **Create a project** page. Notice that if you scroll to the bottom of the page you will find **Academic project templates**



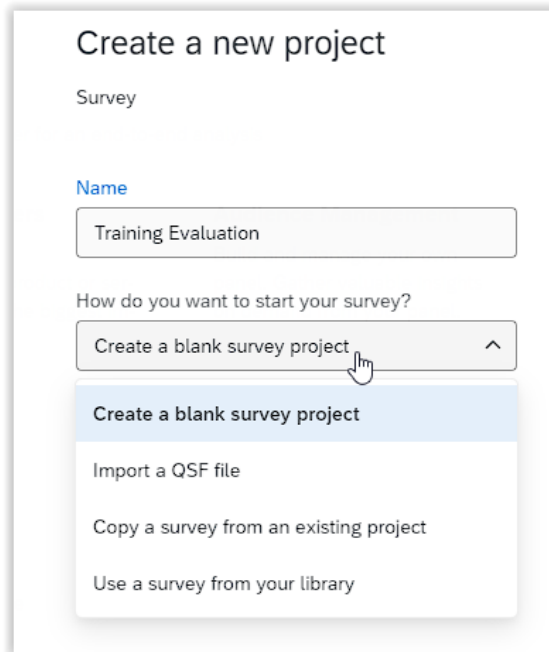
- 5 Click **Survey** from the **From Scratch** section at the top of the interface:



- 6 From the pane that appears on the right of the interface click **Get Started**



- 7 From the **Create a new project** screen that appears fill in the **name** of your project. For this exercise we will call our survey **Training Evaluation**
- 8 From the **How do you want to start your survey?** combo box control select **Create a blank survey project**



The screenshot shows the 'Create a new project' interface. At the top, it says 'Create a new project' and 'Survey'. Below that is a 'Name' label and a text input field containing 'Training Evaluation'. Underneath is the question 'How do you want to start your survey?' followed by a dropdown menu. The dropdown is open, showing four options: 'Create a blank survey project' (which is highlighted with a blue background and a mouse cursor), 'Import a QSF file', 'Copy a survey from an existing project', and 'Use a survey from your library'.

There will be a pause for a few seconds while Qualtrics generates your new survey

- 9 You can now start building your survey, questionnaire or form in the Qualtrics platform.

b. Planning and designing a survey

Designing a Qualtrics survey involves several steps, including planning, creating questions, and formatting the survey. Here are some guidelines to help you design a successful survey:

- Define the purpose of your survey: Before you start creating your survey, think about what you want to accomplish. Are you trying to gather feedback, measure customer satisfaction, or research a particular topic? Clearly defining the purpose of your survey will help you create relevant questions and focus on the information you need to collect.
- Determine your target audience: Consider who you are trying to reach with your survey. Are you targeting a specific age group, geographic location, or industry? Understanding your target audience will help you create questions that are relevant and easily understood.
- Choose the right question types: Qualtrics offers a variety of question types to choose from, including multiple choice, open-ended, and rating scales. Select the types of questions that best fit the information you are trying to gather.

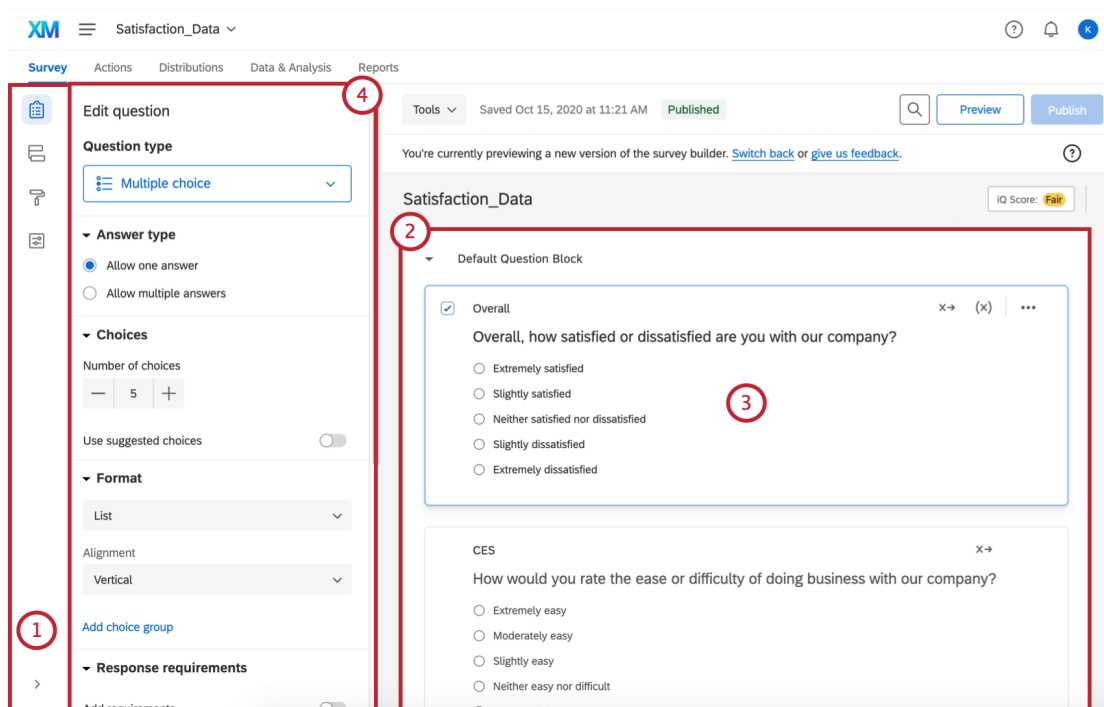
Avoid using too many open-ended questions, as they can be time-consuming to answer and difficult to analyze.

- Keep the survey short and focused: Surveys that are too long or try to cover too many topics can be overwhelming for respondents and may result in lower response rates. Try to keep your survey as short and focused as possible, and only include questions that are necessary to achieve your goals.
- Use clear and concise language: Use simple, straightforward language in your survey to ensure that all respondents can understand the questions. Avoid using jargon or technical terms that may be unfamiliar to some people.
- Test and refine your survey: Before you send your survey out to a large group of respondents, test it with a small group of people to see if it is clear and easy to understand. Use their feedback to make any necessary adjustments before distributing the survey to a wider audience.

3 Adding questions and formatting the survey

a. The Survey Tab

The survey tab provides you the tools to help you build a survey, There are 4 main elements to the interface.



- 1 Survey toolbar
- 2 Question block
- 3 Question editing area

b. Working with Blocks

Every survey includes at least one block initially called the Default Question Block., Every questions you create or edit will be stored inside blocks.

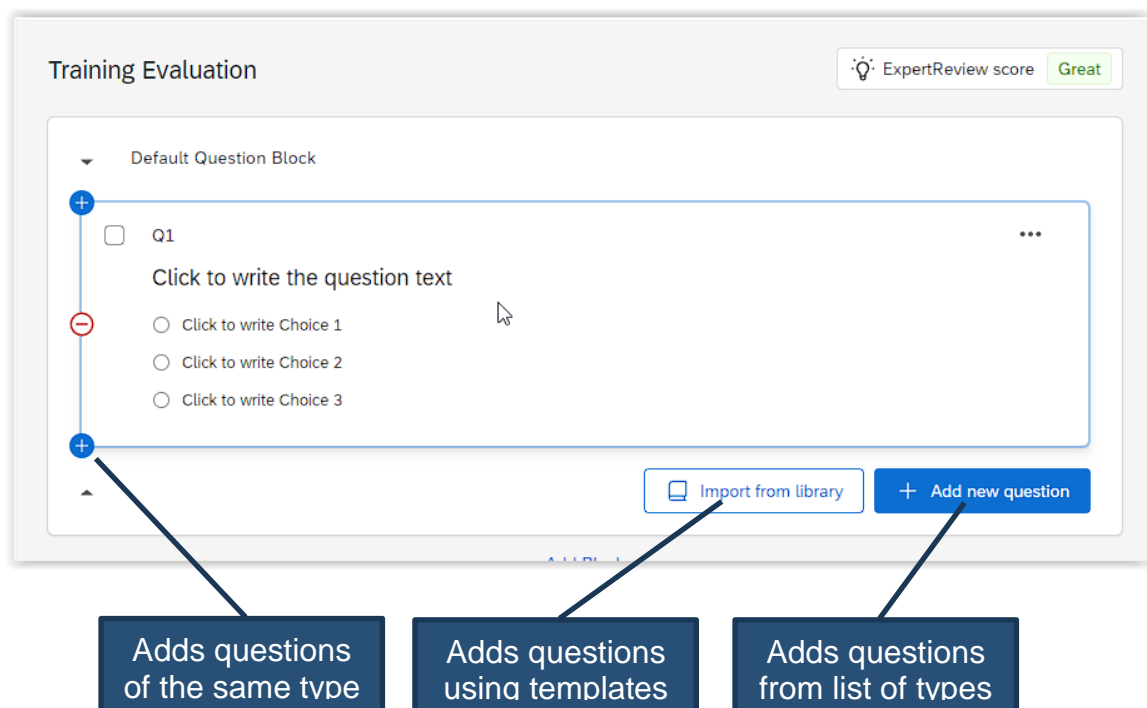
By separating questions into blocks, Qualtrics allows you to control how the questions are asked, so for instance you can have blocks of questions collapse to make the page clearer, you can randomise the blocks or even have certain blocks display in response to specific answers give before.

Blocks are best understood with a couple of examples:

For the most basic surveys, placing all of your questions in a single block will work well, But as surveys become more complex, placing questions into multiple blocks allows the you to create of a sophisticated survey flow, including branches, randomization, authentication, and embedded data.

c. Adding Questions

There are several ways to add questions to your Qualtrics survey, You can add your own questions, created from scratch as well as asking questions using pre-built templates supplied by Qualtrics.



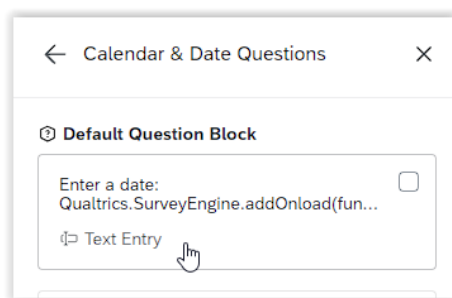
Create a question using a template

To add questions to a Qualtrics survey, follow these steps, with the **Training Evaluation** survey that you have just created:

1. Click the **Import from library** button in the top menu.
2. From the Question library dialogue that appears select **Demographics**
3. From the **Demographics** menu select **Calendar & Date Questions**

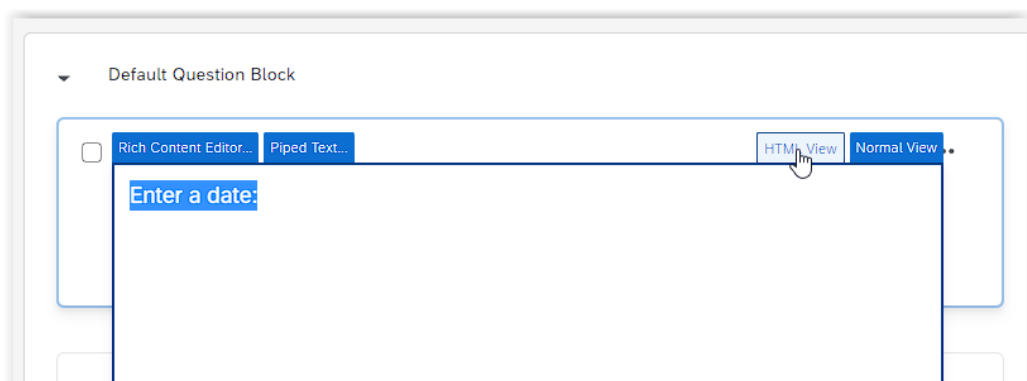
Note: You can select from either the menu item or the block. It makes no difference.

4. Select the first entry from the block of three different date questions

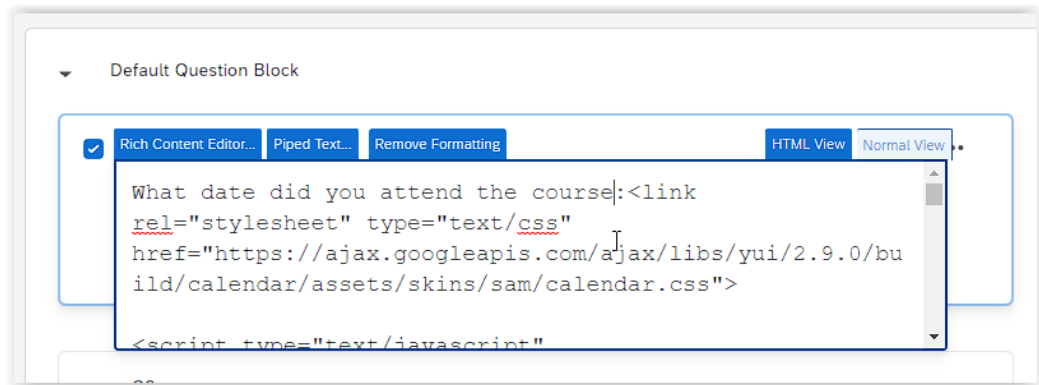


You will see an example of javascript that is the code that makes this date picker work in a web browser.

5. Click the **Insert Question** button at the bottom of the pane
6. The question will appear, though what you are seeing is not how the question will look in the completed survey
7. Click on the text **Enter a date:** within the newly created question
8. Without changing the question text go to the HTML view of the question.



9. Change only the first line of the text with the required without disturbing the code.



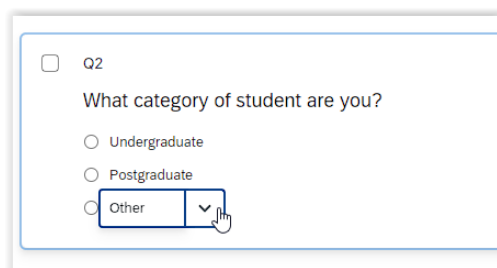
10. Edit the text to read **What date did you attend the course?**

Adding a question from the list of types

1. Click on the **+ Add new question** button
2. From the list of question types, select **Multiple choice**

A multiple choice question will appear

3. Click the question **Click to write the question text**
4. Type **What category of student are you?**
5. Click the 1st answer
6. Type **Undergraduate**
7. Click the 2nd answer
8. Type **Postgraduate**
9. Click the 3rd answer
10. Type **Other**
11. Click the arrow to the left of the 3rd question text:



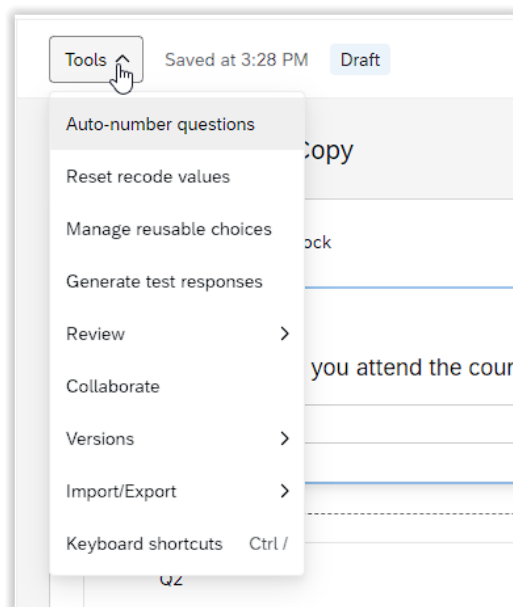
12. From the menu that

13. Enter the question text and any additional options or settings for the question. For example, you can add answer choices for multiple choice questions or specify the scale range for rating questions.
14. Click the "Save" button to add the question to your survey.
15. Repeat the process to add additional questions to your survey.
16. When you have finished adding questions, you can preview and test your survey to make sure everything is working correctly.

Note: You can also add images, videos, and other media to your survey by using the "Insert" menu in the top menu.

d. The Tools Menu

The tools menu offers you access to useful tools for your survey,



Some notable tools:

Auto-Number Questions Question numbers are the numbers to the left of each question. By default, they're preceded by a "Q," and in their unmodified state, they act as a question creation counter (e.g., "Q15" represents the 15th question you have created for the survey).

By default, question numbers are not seen by respondents; instead, they are used to identify your questions when you are reviewing your downloaded data or referencing questions within the Qualtrics platform.

Reset Recode Values When you create a question, a Recode Value and a Variable Name are automatically assigned to each answer choice. The recode value is the numeric value of a choice, whereas the variable name is the label of the choice when you export in choice text format. By default, the first answer

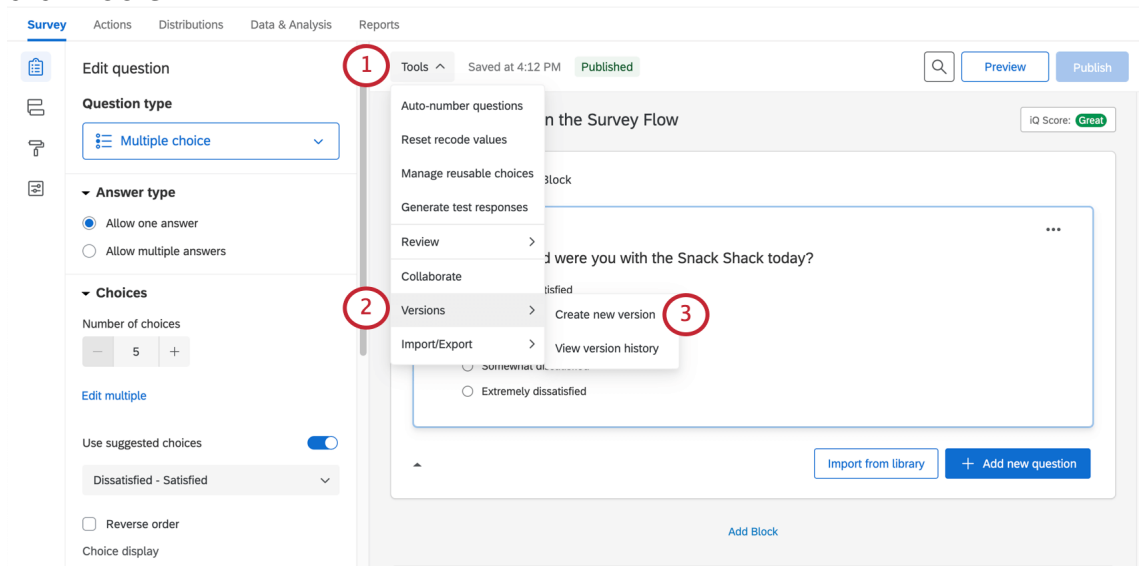
choice will have a recode value of 1, the second choice 2, and so forth, even if you remove answer choices or change the answer choice order.

Sometimes you'll want to reset all of your recode values. Maybe you copied your survey from an old one and don't want the same recodes, or maybe you made many edits you don't like and want to start over.

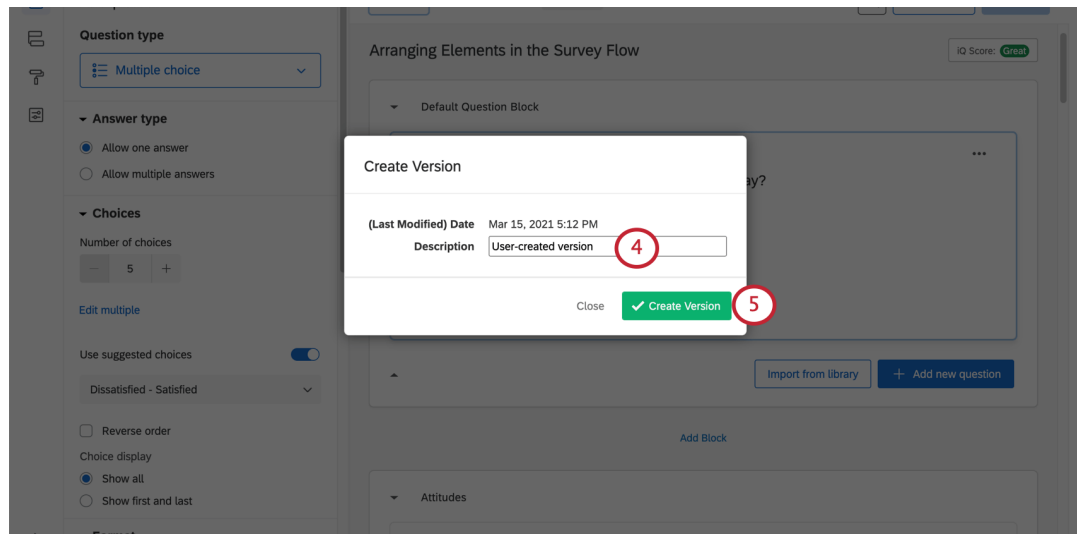
Generate test responses If you want to see how your dataset or reports will look before sending out your survey, but you don't want to complete the survey yourself over and over, you can generate random dummy data.

Versions You can save a version of your survey and revert back to that version at a later date. Aside from publishing or saving your survey normally, you can choose to create a new survey version any time.

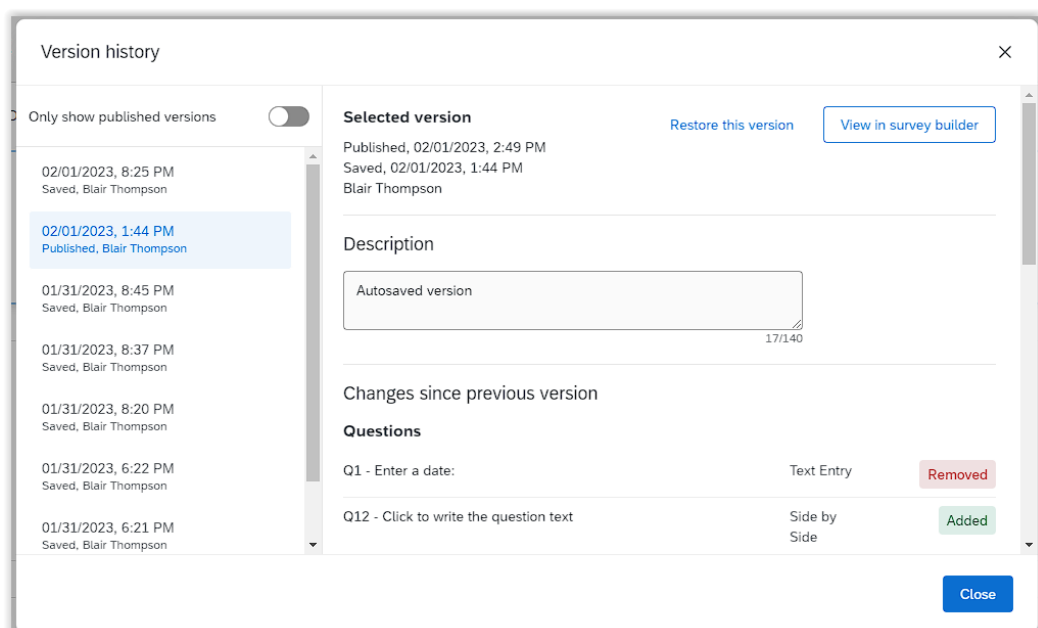
- 1 Navigate to the Survey tab and click **Tools**.



- 2 Highlight **Versions**.
- 3 Select Create New Version.
- 4 Add a description. This can be whatever you like. Dates will automatically be stored with the version, so don't worry about adding date labels.



- 5 Click Create Version.
- 6 If you want to revert to an older version click **Tools**
- 7 From the Menu Pick **Version > View version history**



- 8 From the version history select the version you want
- 9 Click **Restore this version**

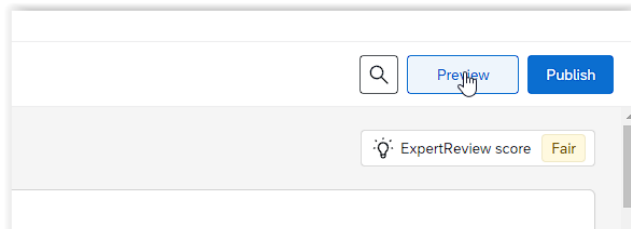
4 Previewing and testing the survey

After you have finished creating your survey, it's important to preview and test it to make sure everything is working properly. You can do this by clicking the "Preview"

button in the top menu. This will allow you to see what the survey looks like from the respondent's perspective and make any necessary adjustments.

a. Using the Preview tool

- 1 Click the **Preview** button on the top left side of the screen



A new window will appear in your browser.

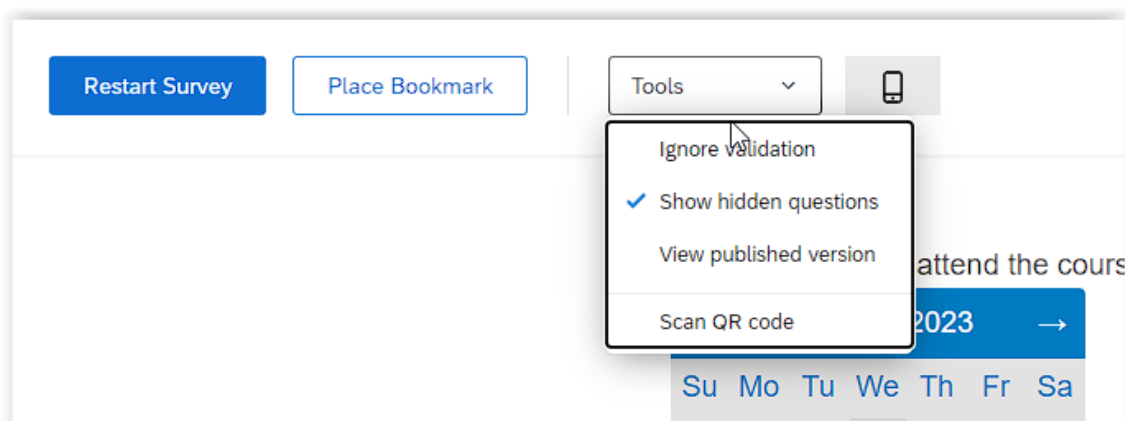
- 2 Take some time to play with the questions in the form, this should be close to the same experience that your forms users will experience.

b. Preview Banner

This banner will have options useful for previewing the survey. Remember, these options are only available during the preview mode and will not be accessible with live links.

The **Restart Survey** control allows you to restart the survey and navigates you to the beginning

When you click on the **Tools** control, you will see a menu appear with four items on it:



Ignore validation bypasses questions with answer validation, such as any character limits in Text Entry questions. This includes force response and custom validation. It also allows you to bypass non-SSO authenticators so that you can

complete the survey without authenticating. This is helpful when you want to test a specific portion of your survey without having to answer every required question.

Show hidden questions lets you view questions that may be hidden to respondents, like timing and meta info questions. This option is enabled by default. Remember that this option only applies to the preview survey mode and that these questions **will not** be seen by respondents accessing a live link.

Place Bookmark tags any page you are currently on, letting you skip previously tested questions later. Note that after placing the bookmark, the Place Bookmark button will be replaced with a button that says, “Go to Bookmark.” The next time you start your preview survey, you can click **Go to Bookmark** and jump ahead to the bookmarked page.

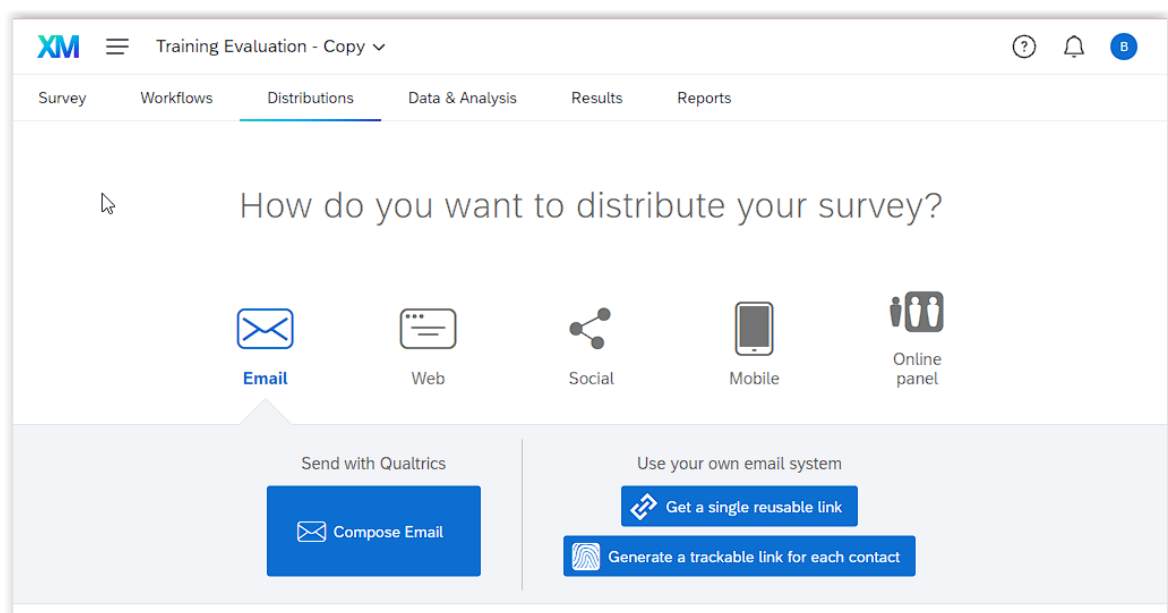
At any point, you can clear away the bookmark or place it somewhere else. Click the “Clear” button to clear your current bookmark and place a new one.

5 Distributing Surveys

Now that your survey is ready, it's time to distribute it to collect responses. There are several ways you can do this, including sending the survey via email or link, or embedding it on a website. You can also set up reminders and incentives to encourage people to complete the survey. As responses come in, you can track completion and view the results in real-time.

a. Sending the survey via email or link

To send a survey you must first publish it. You do this via the **Distributions** tab. When you click on this tab in an unpublished survey you will be offered the following screen. Selecting any of these options will publish the survey.



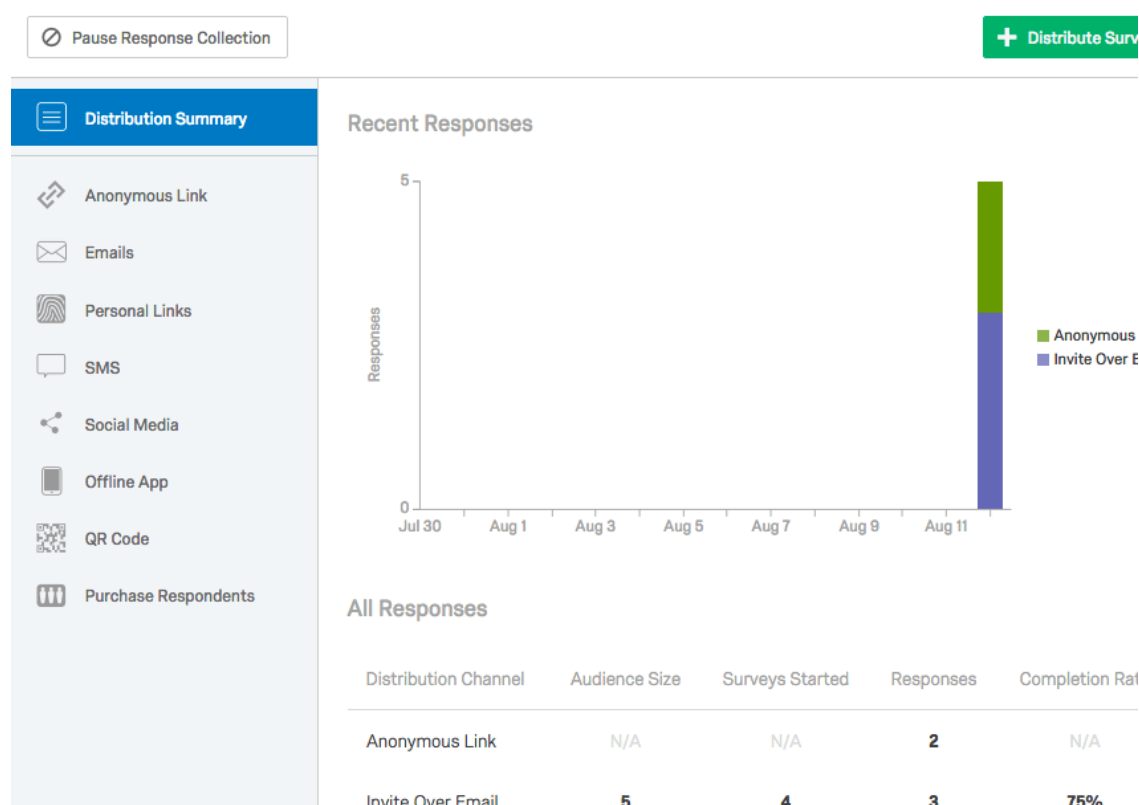
As the Distributions tab first opens, you'll need to pick a distribution **channel**. Channels include:

- Email
- Web
- Social
- Mobile
- Online Panel

If you select one of the channels, and underneath you will be presented with a variety of methods that are relevant to that channel. Selecting a method will start collecting survey responses.

b. Distribution Summary

After you select your initial channel and method, Qualtrics will reveal a distribution summary so you can track your response metrics.



The distribution summary will show you, in real time, the responses that have been collected. Responses are broken down by channel with an interactive graph and a table displaying your response trends.

These metrics can help you spot troubles early and adjust quickly to keep your research on track. The summary can also help you decide if you have sufficient data to stop collecting data.

c. Stages of Response Collection

To protect your project's response data, a survey passes through stages:

- New: You are still creating your survey. No data is being collected.
- Active: You have selected your distribution channels and methods.
- Paused: You have paused or halted survey collection because you:
 - Have completed your data collection.
 - Need to make corrections or add additional questions.

If you are not careful, some changes may invalidate parts of your data. To identify the types of changes that may affect reliability and validity, visit the testing/editing active surveys page.

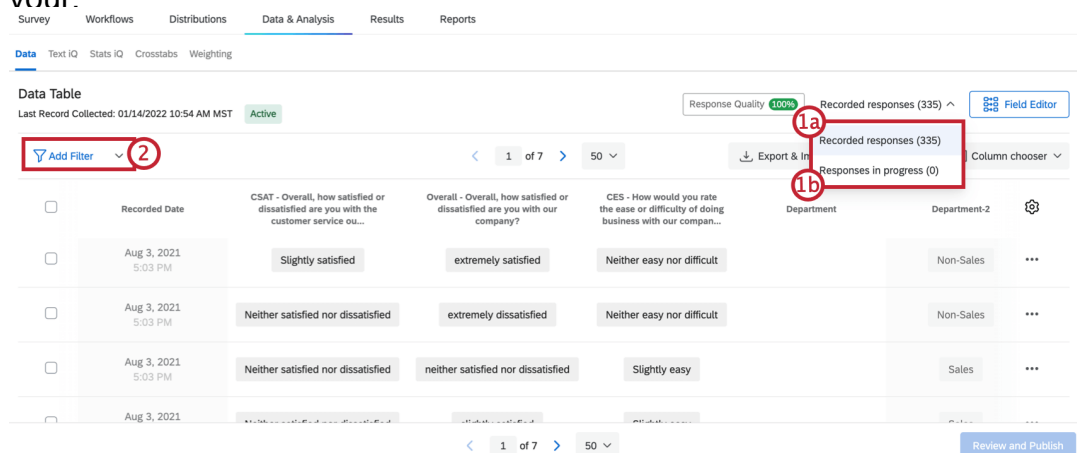
- Resume: You have decided to resume response collection.
- Expired & Closed: You have set a survey availability date and time. At that instant, survey collection ends and the survey is closed to any additional responses. Even after you've passed your availability date, you can:
 - Restart your data collection. You will need to remove the availability from before resuming data collection.
 - Recycle a survey by making a copy.
 - Delete all of the current responses and redistribute the survey again.

6 Data & Analysis

Once you have collected enough responses, you can start analysing the results. Qualtrics provides several options for viewing and exporting the raw data, including charts, tables, and pivot tables. You can also generate reports and export the data to other tools for further analysis. As you interpret the results, be sure to consider the limitations of your survey and the potential biases of your respondents.

Most filtering, classifying, merging, importing, and data cleaning activities take place under the Data section. For example:

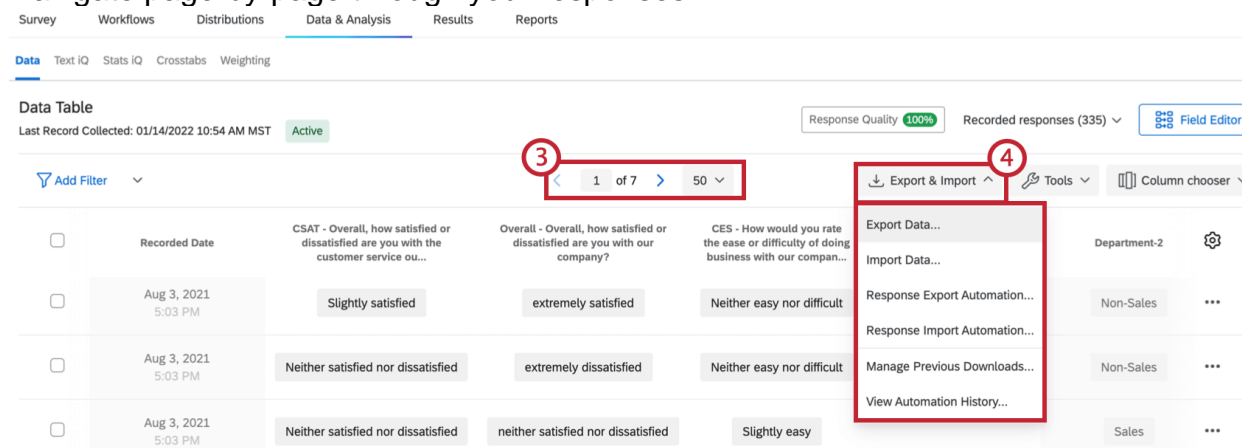
- 1 Display and review results in the responses window by toggling between your:



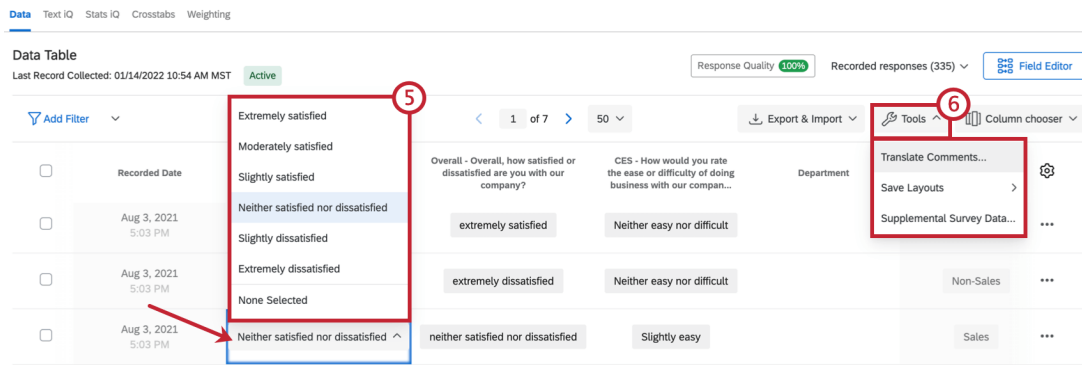
- a. “Completed” or Recorded Responses
- b. “Incomplete” or Responses in Progress

- 2 Filter by specific questions or by your saved filters, survey metadata, contact fields, or embedded data fields.

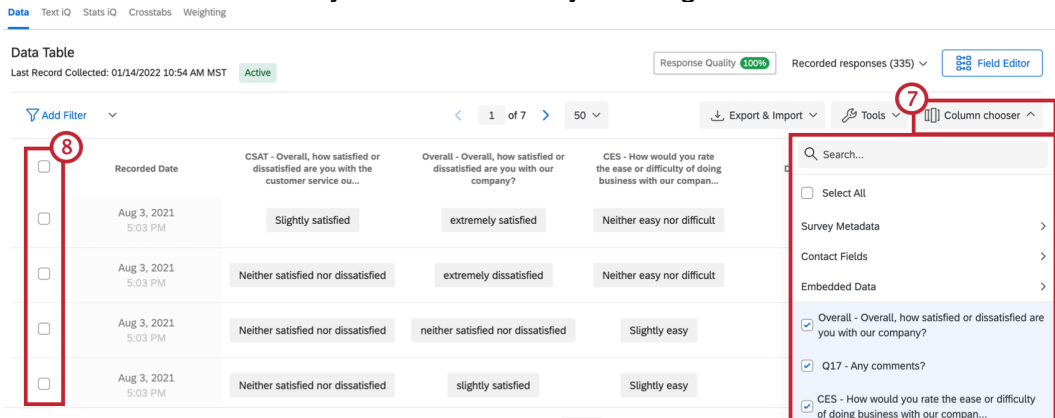
- 3 Navigate page-by-page through your responses.



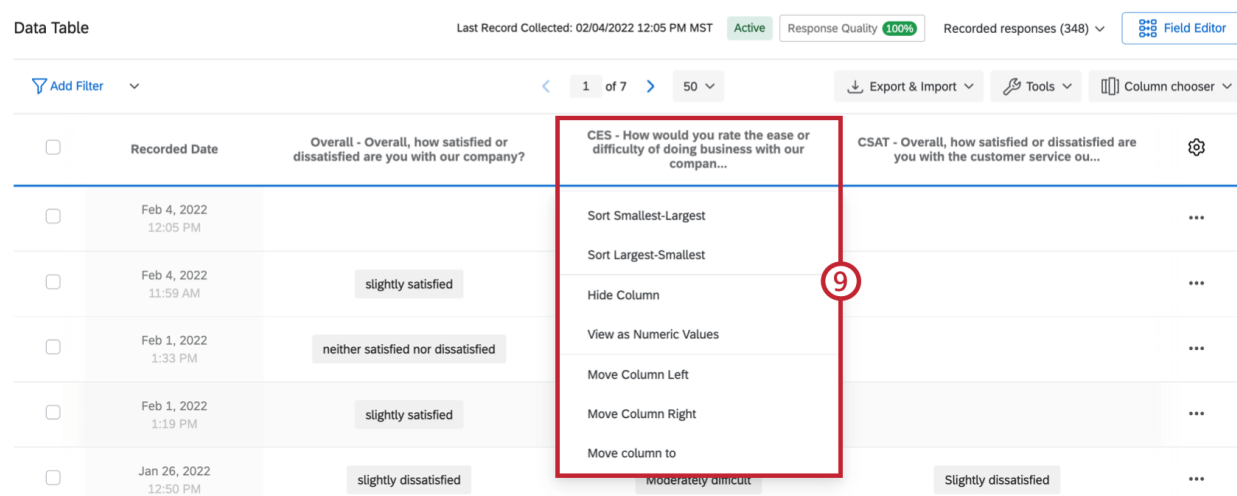
- 4 Click the Export & Import dropdown menu to import responses, combine responses from multiple surveys, manage your previous downloads, or export your data in various formats.
- 5 Click into individual answers to edit responses; you can add answers to individual responses or make essential edits,



- 6 Translate responses, save column layouts, or set up projects as a supplemental data source under the Tools dropdown menu.
- 7 Select the columns for your data table by clicking Column chooser.



- 8 Delete, edit, or revert changes to multiple responses by using the checkboxes in the data table.
- 9 Click any column header to move, hide, or sort columns (e.g., A-Z). You can also view responses as numeric values (also known as recode values) in a column.



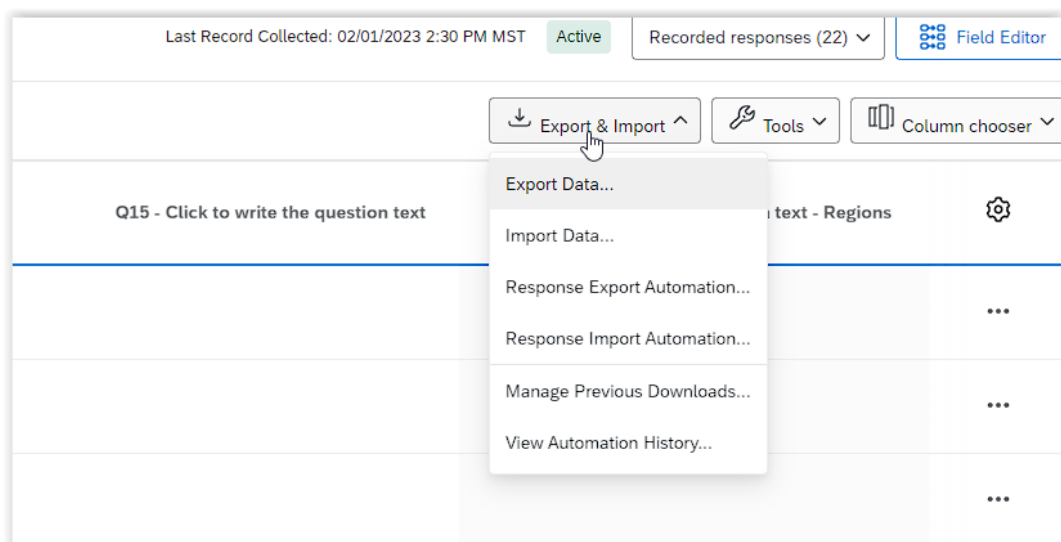
- 10 Click the three horizontal dots to see more options, including deleting individual responses, exporting data to a PDF, or issuing a survey retake.

The screenshot shows a survey data table with columns: Recorded Date, Overall - Overall, how satisfied or dissatisfied are you with our company?, CES - How would you rate the ease or difficulty of doing business with our company..., and CSAT - Overall, how satisfied or dissatisfied are you with the customer service ou... The table has 5 rows of data. A dropdown menu is open on the right side of the table, showing options: View Response, Delete Response, Retake Response, Retake as New Response, and Export to PDF.

	Recorded Date	Overall - Overall, how satisfied or dissatisfied are you with our company?	CES - How would you rate the ease or difficulty of doing business with our company...	CSAT - Overall, how satisfied or dissatisfied are you with the customer service ou...
<input type="checkbox"/>	Feb 4, 2022 12:05 PM		Moderately easy	
<input type="checkbox"/>	Feb 4, 2022 11:59 AM	slightly satisfied	Moderately difficult	
<input type="checkbox"/>	Feb 1, 2022 1:33 PM	neither satisfied nor dissatisfied	Extremely easy	
<input type="checkbox"/>	Feb 1, 2022 1:19 PM	slightly satisfied	Moderately easy	

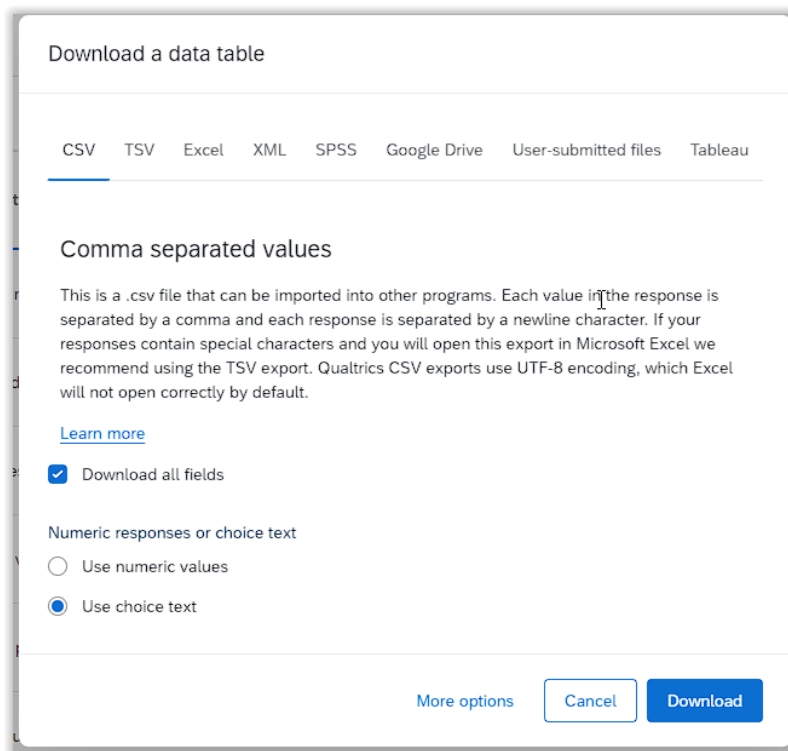
b. Viewing and exporting raw data

- 1 From the **Data & Analysis** tab, and with **Data** selected
- 2 Select **Export & Import**



- 3 Select **Export Data**

- 4 From the popout that appears, select the data format that you wish to export



- 5 Select the options using the tick box/radio buttons
- 6 Click **More Options** if you need to make further changes
- 7 Click **Download**

7 Advanced Features

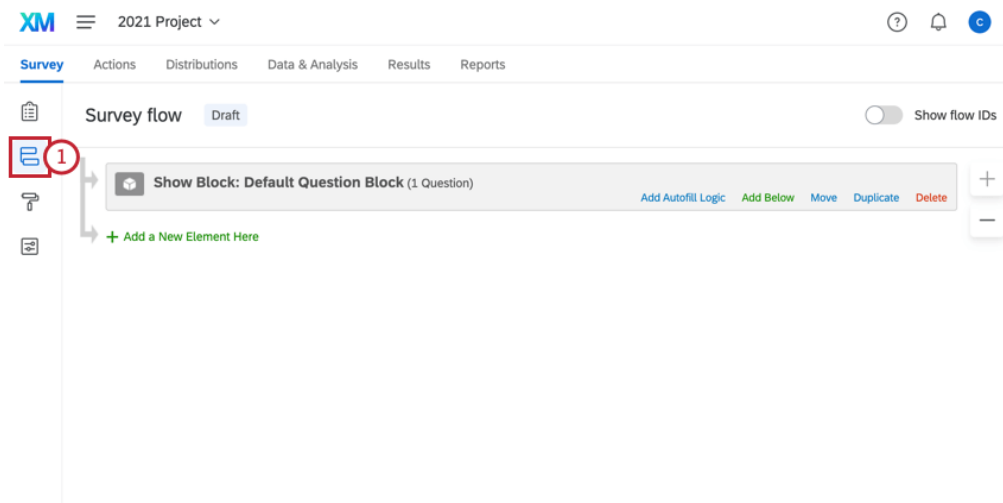
In addition to the basic features covered so far, Qualtrics also offers advanced options for those who want to customize their surveys even further. For example, you can use logic and branching to show different questions or sections based on the respondent's previous answers. You can also use custom scripts and integrations with other platforms to extend the functionality of your surveys.

a. Adding logic and branching to surveys

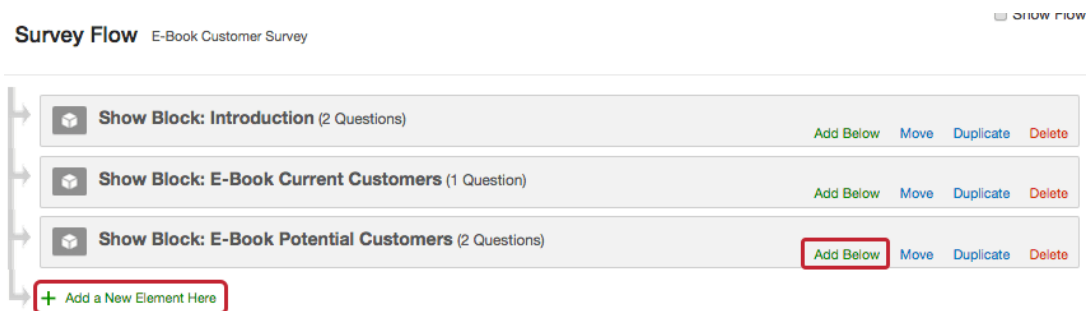
Branches are useful when you want to send respondents down different paths in the survey. You can use branch logic to branch respondents to different survey flow elements based on variables like question responses or embedded data.

Adding a Branch

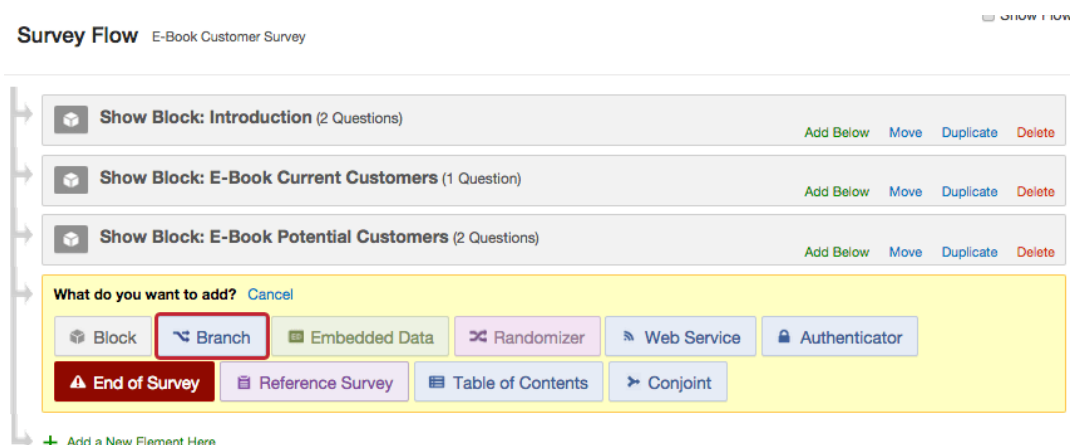
- 1 While editing your survey, click the **Survey flow** icon in the left navigation bar.



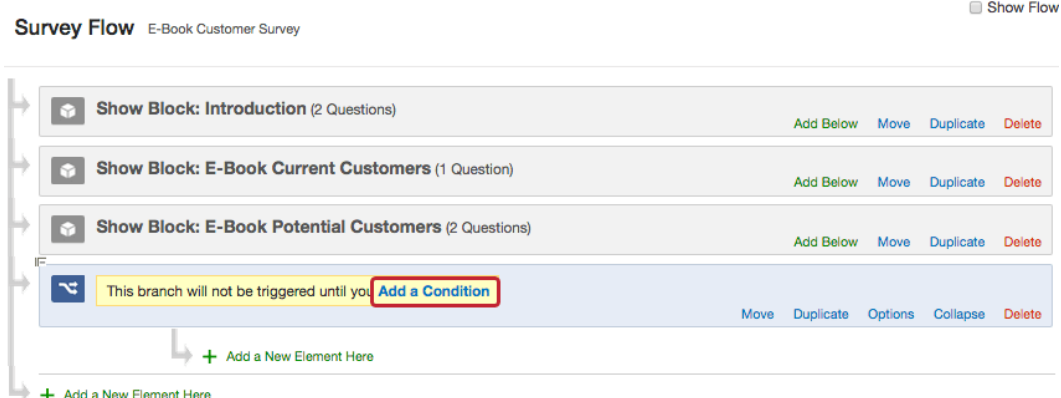
- 2 Click **Add Below** or **Add a New Element Here**.



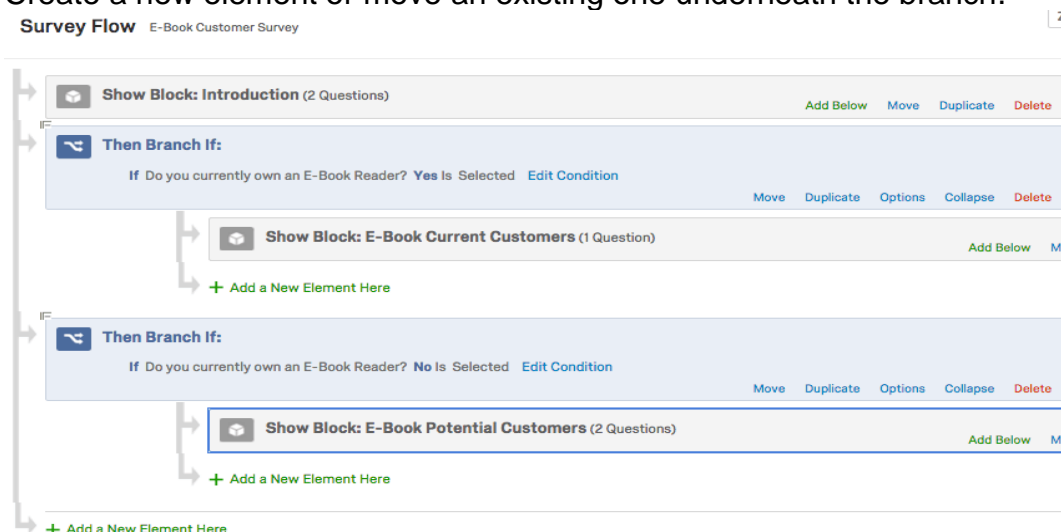
- 3 Choose **Branch**.



- 4 Click **Add a Condition** and add a logic condition (conditions can be based on questions, Embedded Data, Device Type, Quotas, or GeoIP Location).



5 Create a new element or move an existing one underneath the branch.



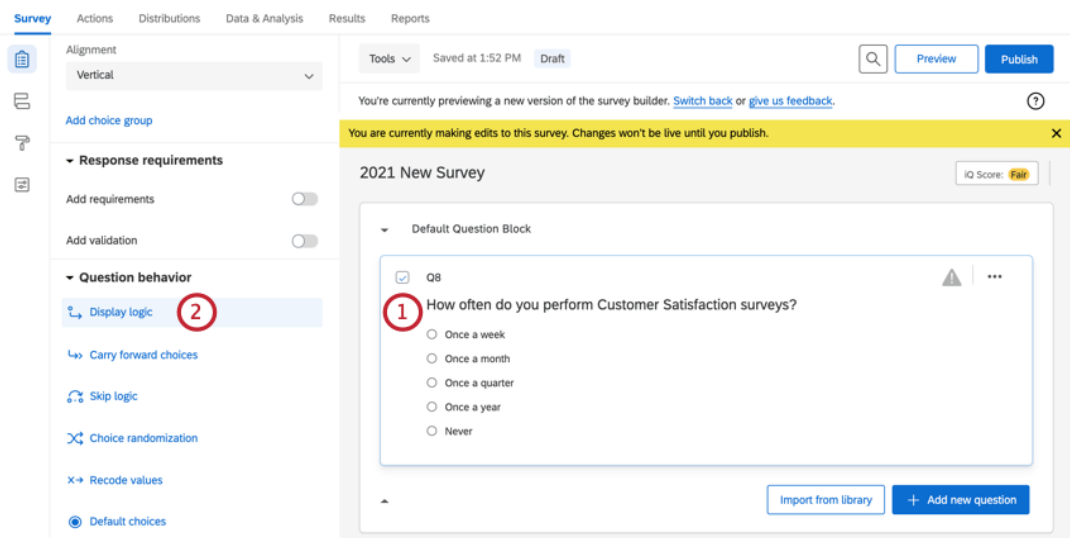
Participants who answer “Yes” to the question “Do you own an E-Book reader?” will be shown the E-Book Current Customers block.

b. Display Logic

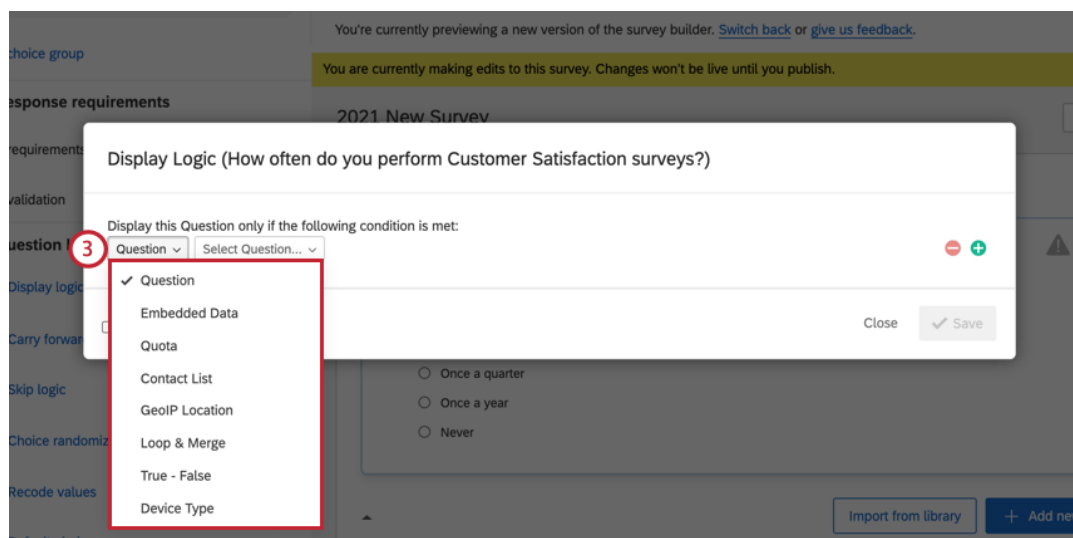
You can use display logic to create a survey that is customized to each respondent. When a specific question or answer choice pertains only to certain respondents, you can set display logic on it so that it shows conditionally based on previous information. You can choose to conditionally display both questions and answer choices, allowing you to create a survey that dynamically adapts to your respondent’s answers. Display logic is found in the Question behaviour section of the survey builder.

Setting Display Logic

- 1 Select the question that you want to display conditionally.

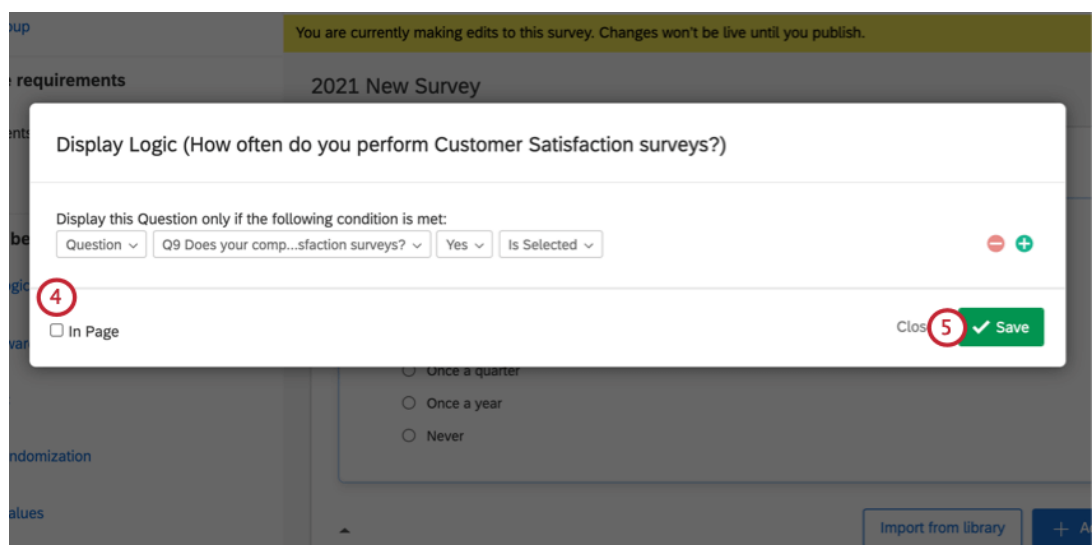


- 2 Select Display logic.
- 3 Set the condition that must be met for the question to display. The condition can be based on any of the following:



- Question: Display a question only if the respondent chose a specific answer to a previous question. This is the only option compatible with in page display logic (see below).
- 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 and merge block has been created, set the conditions within the loop and merge based on the current loop.
 - Device Type: Base the condition on what type of mobile device is or is not being used, including Mobile (any mobile device), Blackberry, Android, iPad, iPhone, iPod, Opera Mobile, Palm, Windows Mobile, and Other Mobile (any mobile device that is not listed here).
 - True – False: Create a condition that always evaluates to true (meaning the question will always display) or false (meaning the question will never display). This is particularly useful when building and testing your survey. See logic based on true – false.
- 4 If desired, select the In Page checkbox if you want the question to appear immediately once the condition is met, rather than displaying it on the next page of the survey. For more information about this option, read the using in page display logic section.



- 5 When finished creating your conditions, click Save.

Useful Shortcut keys

Using keyboard shortcuts can help you become more efficient when creating documents in Microsoft applications. Most keyboard shortcuts require you to use two or more keys at the same time. To use a keyboard shortcut first press and hold down the modifier key or keys (i.e. SHIFT, CTRL, ALT) and then press the corresponding standard key on your keyboard.]

Function

Shortcut

General

Open this legend	Ctrl+/
Move focus to next section	Ctrl+F6
Move focus to previous section	Shift+Ctrl+F6
Move focus to next related element	Ctrl+Space
Move focus to previous related element	Shift+Ctrl+Space

Question actions

Add question above	Ctrl+Alt+a
Add question below	Ctrl+Alt+b
Enter question	Enter
Exit question	Escape
Focus rich content editor toolbar from question text	Alt+F10
Delete question	Delete

Question selection

Select question below	↓ or →
Select question above	↑ or ←
Extend selection down	Shift+↓
Extend selection up	Shift+↑
Focus down without changing selection	Ctrl+↓
Focus up without changing selection	Ctrl+↑
Select or unselect question	x
Select all questions in block	Ctrl+a
Unselect all other questions	Shift+n

Block actions

Enter block	Enter
Exit block	Escape
Delete block	Delete

Block selection

Select next block	Tab
Select previous block	Shift+Tab

Move questions or block

Initiate move on selected items	Space
Move placement indicator	↑ or ↓
Place item(s)	Space
Cancel operation	Escape