Qualtrics:
Getting Started in 5 Steps

Qualtrics Getting Started

Step 1: Beginning to Build

In this step, you will learn how to create a survey from scratch using various Qualtrics features for adding questions, editing questions, and formatting your survey's look and feel.

Project 1

1. Create a new project from scratch.
2. Build a new descriptive text question that welcomes your respondents to your survey. Using the Rich Content Editor, insert an image of your ice cream shop in the text of this question.
3. Insert a manual page break after your welcome question.
4. Build a new multiple choice question (after the page break) asking your respondents if they recently visited your ice cream shop.
5. Build a new multiple choice question asking your respondents for their gender.
6. In a new block, build a new matrix table question asking how satisfied your respondents were with various aspects of your ice cream shop (taste, flavor options, atmosphere, staff).
7. Build a new text entry question asking why your respondents were dissatisfied with their visit to your ice cream shop.
8. Use the Look & Feel to apply a survey theme that you like.
9. Use the Look & Feel to change the question text across your entire survey to Georgia font.

Additional Content

Allow Text Entry
> This option adds a text box to an answer choice, which allows you to gather additional information from your respondents when a particular choice (i.e. an "other" answer choice) is selected.

Captcha Verification
> This question type is used to ensure that your respondents aren't robots by presenting a "challenge" that the respondent must solve in order to proceed in the survey.

Constant Sum
> This question type allows your respondents to enter numeric data that is then summed and displayed back to the respondent.

[Drill Down](#)

This question type helps respondents to choose from a long list of options. Respondents will first choose from a general dropdown list that will determine the options presented in future dropdowns.

[File Upload](#)

This question type is used to collect user-uploaded photos and documents.

[Gap Analysis](#)

This question type allows respondents to tell you why they selected a particular answer.

[Graphic Slider](#)

This question type allows your respondents to indicate their preference using a more engaging scale, such as changing a frown to a smile.

[Heat Map](#) [and Hot Spot](#)

These question types allow you to gather feedback on images.

[Highlight](#)

This question type allows you to present respondents with an interactive text sample. Respondents can select words from the text and evaluate them using criteria you choose.

[Import Questions From](#)

This button allows you to pull questions in from an extensive question library that Qualtrics has put together (or from other surveys that you've made). It includes demographic questions, calendar questions, satisfaction scales, and more.

[Pick, Group, and Rank](#)

This question type allows respondents to drag and drop items within groups. Respondents can also rank those items within each group.

[Meta Info](#)

This question type records the public information about the respondent's computer, such as their browser and operating system.

[Net Promoter® Score](#)

This question type allows you to garner customer loyalty using a standard format: "On a scale from 0–10, how likely are you to recommend our [company/product] to a friend or colleague?"

[Signature](#)

This question type presents respondents with an entry box where they can draw their signature.

[Timing](#)

This question type is used to time—as well as limit, if desired—how long participants spend on a page of the survey.

Step 2: Customizing Survey Pathways

In this step you will learn about the various logics that enable your survey to present unique experiences to each respondent. Specifically you will learn how to hide/display questions and question blocks based on respondent criteria (i.e., only those 18+ are allowed to see the main survey questions).

1. Use skip logic to skip those that have not recently visited your ice cream shop to the end of the block.
2. Use a branch in your survey flow (placed in between your first and second blocks) that sends respondents to the end of the survey if they have not recently visited your shop. Set up a custom end of survey message that will display to these respondents as they end your survey.
3. Use display logic to specify that your text entry question (why were you dissatisfied?) only appears to those who indicated that they were dissatisfied in your matrix table question (how satisfied were you with…?)
4. Preview your survey to ensure that your logic is working as expected. Make any changes needed to achieve the desired behavior.

Additional Content

Carry Forward:
> This feature allows you to copy specific answer choices from one question and bring them into a future question in your survey.

Default Choices:
> This feature allows you to pre-populate answer choices when a respondent opens their survey or arrives at a particular question.

Loop & Merge:
> This feature allows you to take a block of questions and dynamically repeat it multiple times for a respondent.

Piped Text:
> This feature allows you to pull in previously collected information and display it to respondents.

Randomizer:
> This Survey Flow element allows you to randomize the order of blocks or other elements in your Survey Flow. You can also apply randomization to question order using Question Randomization or to answer choices using Choice Randomization.

Step 3: Customizing Survey Experience

In this step you will learn how to customize your survey further using some advanced Qualtrics features like Quotas and Force Response.

1. Apply Force Response to the question asking if your respondents have recently visited your ice cream shop.
2. Add a quota specifying that 50 males take your survey and another specifying that 50 females take your survey. Once each quota has been met, you'd like to end the current survey for any who would have incremented the relevant quota. Set up a custom end of survey message that will display to these over-quota respondents.
3. Ensure that your survey will save your respondents' progress as they move throughout it.
4. Set your survey to expire in one month's time.

Additional Content

Survey Accessibility:
> This feature diagnoses your survey, indicates which questions are inaccessible to screen reader programs, and gives other recommendations for increased accessibility.

Custom Validation:
> This feature allows you to require that respondents answer a particular question in a certain way.

Email Triggers:
> This feature allow you to send an automatic email notification to yourself or to someone else whenever a participant finishes a survey.

Scoring:
> This feature allows you to grade or assign point values to different answer choices in Multiple Choice, Matrix Table, and Text Entry questions.

Test Survey:
> This feature will generate random dummy data so you can see how your data and reports will look before sending out your survey.

Translate Survey:
> This feature allows you to add multiple languages to a single survey.

Step 4: Distributing your Survey

In this step you will learn how to get your survey to your respondents. Specifically you will learn about the various distribution methods in Qualtrics: email, social media, QR codes, etc.

1. Navigate to the Contacts section and create a contact list. Import yourself as a contact from a file. Include your first name, last name, and email address in the import.
2. Head back to the Distributions module and compose an email. Use piped text (discussed in step 3) to insert the contact's first name in the email message.

3. Send your survey to your newly created contact list (that has you in it).
4. Take your survey using the [Anonymous Link](#) a few times (you'll need to do this for step 5). Be sure to answer your [text entry question](#) (why were you dissatisfied) a few times, as well.

Additional Content

[Authenticators:](#)
This feature provides you all the benefits of an Individual Link without actually creating or sending out an individual link. Instead, respondents are prompted to log in when they take the survey, which allows you to confirm someone's identity.

[Contact List Triggers:](#)
This feature allows you to create contact lists that include respondents from your surveys or update contacts in an existing list based on their survey responses.

[Inline Email Questions:](#)
This feature allows you to insert survey questions into the body of the email that your respondents receive.

[Offline App:](#)
This upgrade feature allows you to administer surveys on your mobile device without an internet connection.

[Pause Response Collection:](#)
This feature turns your survey "off" so that it no longer accepts new responses.

[Personal Links:](#)
This feature generates links that allow you to use your own mailer or a third-party mail system to distribute your survey invitations while also tracking which response belongs to which recipient.

[QR Code:](#)
This distribution type creates a type of matrix barcode linked to your survey that can be printed or shown as an online graphic.

[SMS distribution:](#)
This distribution type allows you to send surveys and survey invitations over short message services (SMS), or text messages.

[Social Media:](#)
This distribution type allows you to post your Anonymous Link to social media websites.

Step 5: Analyzing your Data

In this step you will learn how to analyze the data that your respondents have provided. Specifically you will learn about the Data & Analysis and Reports modules that enable you to view your data on both an individual and aggregate level.

1. Navigate to the [Data & Analysis](#) module and take a look at your completed responses. Customize the response viewer so you're only looking at your gender question, your matrix table satisfaction question, the Recorded Date, and the response duration.
2. [Export](#) your data to a CSV.
3. Add a topic to your text entry responses in the [Text](#) tab.

4. Navigate to the Reports module and create a custom page within your Default Report.
5. Build a visualization of your choice for each of the questions in your survey.

Additional Content

Cross Tabulation:
> This feature allows you to perform multivariate analysis and will calculate p-value and Chi-Square statistics.

Exclude from Analysis:
> This option allows you to exclude an answer choice from calculations in your graphs, tables, and averages in your reports.

Export random order:
> This feature allows you to see the results of any randomization in your survey.

Publish Report:
> This feature allows you to publish your reports to the web and share the report links with others.

Recode Values:
> This feature allows you to change the coded value assigned to each answer choice.

Retake Survey link:
> This feature allows you or a respondent to go back into a survey response and edit it after it has been submitted.

Schedule Report Emails:
> This feature allows you to send a copy of your report to a list of specified email addresses on a recurring basis.