Qualtrics Survey System Reference Guide

This document provides information on how to create a Qualtrics Project (survey, questionnaire or form) and additional functionality to get you started using the survey system at Queen’s University.

1 – Getting Started

Sign On to Qualtrics

Go to queensu.qualtrics.com. The Sign On page is a Queen’s branded screen, as shown below on the left. (The generic sign-in on the right will not work.) Log in with your netid and password.

💡 TIP  If you have trouble signing in, try clearing the cache and delete cookies in your browser.

The My Projects Section

When you first sign on to Qualtrics, the My Projects section appears. (You can also get to it by clicking the words My Projects in the upper left corner when you’re on any other Qualtrics screen.) The My
Projects area is your home base, with a list of all the surveys you have created, plus any surveys that have been shared with you. You can also view how many people have taken each survey, whether it is active, and perform actions on your survey such as duplicate, delete, or share with others.

Click on the name of any survey listed to start working with it.

2 - Create a New Survey

Click the green Create Project button, located near the upper right corner, to start creating a new survey, questionnaire or form.

Type in a name for your survey or form, then click Create Project again to get started.

- Or, if you prefer, you can pick one of the options on the left column -- From a Copy (use a previously-created survey as a starting point), From a Library (start with a survey template).

Create Questions

Once you’ve followed the steps above to start creating a survey, you can begin adding questions to your survey.

Click the green Create a New Question button.

- A multiple choice question will be created by default.
- If you want to change the question type, click the green Multiple Choice button, located near the top of the right column, and select a different question type.
- Create your survey question and answer(s) by typing over the sample text that appears.
- Repeat the steps to create additional questions.
Question Types

Qualtrics provides over 100 different ways to ask a question. There are 22 primary question types and a variety of settings that can be used to access each of these possibilities. This page provides a brief description of the 22 question types.

Descriptive Text

Descriptive Text questions can be used to add an introduction or instructions to your survey, or wherever you need to display content to the respondent, without asking for feedback.

Graphic

Graphic questions can be used to display an image to your respondents without asking for feedback.

Multiple Choice

Multiple Choice questions form the basis of most research. They can be displayed as a traditional list of choices or as a dropdown menu, select box, etc.

Text Entry

Text Entry is used to gather open-ended feedback from respondents. These responses can be lengthy essays, standard form information such as name and email address, or anything in between.

Rank Order

Rank Order is used to determine each respondent’s order of preference for a list of items.

Matrix Table

Matrix Table is used to collect multiple pieces of information in one question. This type provides an effective way to condense your survey or to group similar items into one question.

Slider

Sliders let respondents indicate their level of preference with a draggable bar rather than a traditional button or checkbox.

Side by Side

Side by Side questions let you ask multiple questions in one condensed table and provides an effective way of shortening your survey while gathering the same amount of data.

Constant Sum

Constant Sum collects numeric data and displays a sum to the respondent. This type is often used for allocation assessments, such as defining how you spend your time in different activities.

Hot Spot

Hot Spot allows respondents to interact with regions of an image. This type is often used in usability testing and concept testing.

Graphic Slider

This variation of the Slider question has respondents use various graphic options, such as changing a frown to a smile or choosing a grade, to indicate their level of preference.
Drill Down
Drill Down helps respondents choose from a long list by starting with a broad category and then honing in on the choices that are relevant to the respondent.

Pick Group and Rank
Pick Group and Rank is used for sorting activities. Respondents place items into groups and have the option to rank the items within the group.

Heat Map
Heat Map lets respondents click a specific point on an image. In your data, you can see a heat map that shows which parts of the image were most often clicked. This type is often used for web development (e.g., eye flow analysis) and advertisement testing.

Gap Analysis
This variation on the Side by Side question measures satisfaction and then detects why any gaps in satisfaction exist.

Net Promoter® Score
NPS® tracks customer loyalty with one simple, standardized question: “On a scale from 0-10, how likely are you to recommend our company to a friend or colleague?”

Timing
This hidden question is used to time—as well as limit—how long participants spend on a page of the survey.

File Upload
File Upload is used to collect information beyond the survey questions, such as user-uploaded photos or documents.

Captcha Verification
Captcha Verification is used to ensure that your respondents aren’t robots. This question has participants respond to a challenge to verify they are real humans.

Meta Info
Meta Info reports the public information about the respondent’s computer, such as their browser and operating system. The question requires no respondent action and is completely hidden.

Format Your Questions

Once you start creating questions, you may want to refine the details of your questions. For example, multiple choice questions allow 4 options (a, b, c, d) by default. But what if you want more than 4, or less?

When you click to highlight a survey question you’ve created, you will see options on the right column (see picture on next page). You can change the question type, from Multiple Choice to another type, add and remove answer choices, make a question a required question, and more.
- **Change Question Type**: Change the type of question being used (Multiple Choice is the default question type). By clicking on the big green button (it will say Multiple Choice until you change it) and choosing from the different options shown.

- **Question Type Sub-Choices**: Each question type has multiple variations. Hover over the Down Arrow to see a preview of each and find the selection you are looking for.

- **Choices**: Click the plus or minus buttons (just below the green button) to change the number of multiple choice answers that will appear in your question.

- **Automatic Choices**: Choose from dozens of pre-populated answer scale choices. You can also edit them after selecting.

- **Answers Options**: Allows you to choose between Single Answer, Multiple Answer, Drop-down List, Select Box and more.

- **Position**: Allows you to choose between a Vertical, Horizontal, or Column layout.

- **Validation Options**: Allows you to enable Force Response, which requires participants to respond to the question before moving to the next page. Another choice is Request Response, which notifies the participant when they do not answer a question, letting them choose to move on or to respond.

**Question-Specific Options**: You will notice that each question type has different formatting options in the right column. These options vary depending on the type of question (for example, Multiple Choice or Text Entry) you choose.

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### Preview / Test Your Survey

To see how your survey will look to a user, click on the blue Preview Survey button near the top of the survey creation page. You can take the survey in preview mode as often as you need to test your survey questions and flow.

**TIP** From the Preview screen you can add bookmarks to proceed to a certain section of your survey quicker the next time. You can also choose to ignore validation (forced responses) for testing purposes.
3 – Survey Logic

The logic features in Qualtrics enable you to show or not show certain questions based on an earlier answer (Display Logic), or skip the user to another part of the survey (or terminate the survey) based upon their answer to a certain question (Skip Logic).

Display Logic

This enables you to make a question visible or not visible under certain conditions. Click on the question to highlight it, then click the gear icon to the left of the question and choose Add Display Logic. Next, use the drop-down menus provided to build your question conditions. Press Save when you are finished.

In the example below, the question will only appear to survey-takers who answered ‘Yes’ to the earlier question ‘Were you helped by an Advisor?’ Otherwise, it will not display.

Skip Logic

If you want to skip the survey-taker to a later question, section (Block) or to the end of the survey, choose Skip Logic from the gear icon drop-down menu. Use the options provided to build your logic, then press Done.

In this example, if the survey-taker answers ‘No’ to the question ‘Are you a PCC student?’ they will be taken to the end of the survey.
4 - Distribute Your Survey

Once you have created your survey, it’s time to send it out to people so they can complete it. Click on the word Distributions, located near the top left corner, then click the green Distribute Survey button.

You will be asked to choose how you want to send out the survey.

Compose Email

Choose this Qualtrics Mailer option if you have a Contact List of survey-takers already created and you want to send the survey out to them. The Qualtrics Mailer allows you to send other types of links in addition to the Individual Link. The following link types are available by clicking Show Advanced Options at the bottom of the Compose Email window:

- Individual Link (Default): Each participant receives a personal link that can only be used once.
- Multiple Completes Link: Each participant receives a personal link that can be used multiple times. Each time this link is used, a new response is added to your results and the same contact information is recorded. Reminder and Thank You emails are not compatible with this link.
- Anonymous Link: Each participant receives the Anonymous Link. Reminder and Thank You emails are not compatible with this link.

Reusable Anonymous Link

This option is recommended if you do not need to track how each respondent answered each question, who completed the survey and who didn’t. When you choose this option, use the link provided (copy/paste this link into an email message) and send out your survey using your regular email. (Or, you can put this link onto a department website if you prefer.)

Personal Links

This option is for users who DO need to track how each survey-taker answered each question, and/or whether they completed the survey, but you need to use a third-party mail system to distribute survey invitations (instead of the Qualtrics Mailer). You’ll need to provide the email addresses of each person you anticipate will be taking the survey if you choose this option.

💡 TIP  Other modes of distribution that are available are Social Media links and QR Codes.
5 - View the Results

The Data & Analysis Tab

Once you have distributed your survey and people have taken it, you can view the results. Click Data & Analysis near the upper left. The picture below is intended as a guide to interpreting the data on this tab.

Survey results that are incomplete (i.e. the survey-taker did not finish taking the survey) will not show up on this tab. If you want to see them, click Responses in Progress on the upper right.

If you want to include the incomplete responses in your data analysis, first go to Responses in Progress on the upper right corner and use the drop-down menu to Close the incomplete responses. They will then be treated as completed responses and included in the data displayed.

One way to see how many people answered Yes to question 1, for example, is to create a Filter based on that question, then view how many results come up. Just click Add Filter, specify the question you want to use to narrow down your data, and use the drop-down menus to indicate the specifics of what
you want. Then scroll down to the bottom of the page to see how many results match your filter criteria.

Your results can be exported to CSV or SPSS file using the Import/Export button.

The Reports Tab

To look at your aggregate (as a whole) results in summary format, choose the Reports module. This is also where you can create printable reports and add graphs.

Click one of the Visualization options in the right column to add a bar graph, pie chart, etc.

Click on the questions on the left column, or press Next Page, to toggle through the questions of your survey

To get a .pdf, Word, or Excel-friendly version of the report, click Report Options.

6 - Survey Tools

Survey Tools are features to help you create surveys and give them advanced functionality. These features include options like Auto-Number Questions, Email Triggers, Quotas, Translations, and Scoring. You can access the Survey Tools by clicking on Tools in the Survey module.

- **Auto-Number Questions:** Change the Question Numbers for all of your questions. You can auto-number sequentially, by block, or by the internal ID number.
- **Search And Replace:** Quickly find specific words in a survey and replace them with another word.
- **Strip Formatting:** Remove all formatting from the selected questions. Use this option if questions in your survey have different fonts or styles that you want to remove.
- **Test Survey:** Generate automated dummy responses for your survey to see what the dataset and report will look like before sending the survey to actual participants.
- **Check Survey Accessibility:** Determine whether your survey is accessible for respondents who use screen readers, and receive suggestions for improving your survey’s accessibility.
- **Triggers:** Every time a response is submitted, automatically send emails through the Email Trigger or add respondents to a contact list through the Contact List Trigger.
- **Salesforce:** Integrate survey information with your Salesforce database through the Response
Mapping and Triggering Surveys features.

- **Quotas**: Create and monitor quotas on your surveys.
- **Scoring**: Assign point values to answer choices to use your survey as a test or quiz.
- **Translate Survey**: Translate your survey into multiple languages, allowing respondents to choose which language to view the survey in.
- **Create New Revision**: Save a revision of your survey in order to view and restore it later if needed. By default, Qualtrics will also periodically create revisions for you that can be viewed and restored.
- **View Revision History**: See past revisions of your survey and, if desired, restore them so they become the current survey revision.
- **Print Survey**: Use this option to print or save a PDF version of your survey. This PDF file can also be exported to your computer or mobile device.
- **Export Survey to Word**: Export your survey as a DOCX Word document that contains the plain text of your survey questions and answer choices. (The exportable Word document can also be used as a data dictionary or codebook for those who need to know which recode values are associated with each answer choice.)
- **Export/Import Survey**: Export your survey as a QSF file to be imported into another account; Import from QSF or TXT.

7 - Survey Options

Survey Options is where you go to change many general survey settings, such as the survey expiration date or the message that will appear to respondents when they finish the survey. To access these settings, click Survey Options at the top of the Survey module. Survey Options is divided into six sections, as described below.

- **Survey Experience**: Survey Experience includes options that will directly impact the respondent experience, such as whether or not a back button will be included and whether respondents can return and finish the survey at a later date if they don’t finish in one sitting.
- **Survey Protection**: Survey Protection helps you ensure that only the appropriate people take your survey. You’ll also find options like password protection and expiration dates.
- **Survey Termination**: Survey Termination contains options for controlling the survey ending experience. From here, you can choose different endings, such as redirecting respondents to a specific website or displaying a custom message. You can also choose to anonymize dataset responses.
- **Inactive Surveys**: Inactive Surveys lets you choose what message respondents see when they
attempt to open a survey that is not currently collecting responses.

- **Partial Completion:** Partial Completion lets you specify how long a respondent can leave an unfinished survey before that survey is automatically closed out.

### 8 - Survey Blocks

Blocks are sets of questions within your survey. Typically, questions are separated into blocks for the purpose of conditionally displaying an entire block of questions, or for randomly presenting entire blocks of questions.

These branching and randomization options are found in the Survey Flow. Blocks can also be used to organize longer surveys. For example, the first two questions in your survey might be in a block called Introduction, and the rest of your survey questions in a block called Main Survey.

Respondents won’t see these block titles, but to add a description that they will see, add a Descriptive Text question as the first question in your block. This is found in the question types menu, or by removing all the choices from a multiple choice question.

Block Options can be found on the top right of every block. There are options that allow you to manipulate the block as a whole.

### 9 - Survey Flow Module

The Survey Flow is a block-level view of your survey. From here, you can customize where respondents go in your survey and what they see. You can perform simple tasks like rearranging blocks, or you can add elements like Branch Logic that direct and personalize your respondents’ survey experience. Respondents will start at the top of the flow and work their way through until they reach an end point and finish the survey.
The following is a list of the different Survey Flow elements that can be used in combination with each other to create a well-designed research project.

- **Question Blocks**: Show a block of questions (typically used in conjunction with other Survey Flow elements).
- **Advanced Branch Logic**: Conditionally display blocks and other elements. You can use Branch Logic to branch respondents to different Survey Flow elements based on variables like question responses or Embedded Data. Depending on how your respondents answer certain questions, they will take different routes through your survey.
- **Embedded Data**: Add any extra information beyond the question responses (such as panel data or other variables from your contact list or assigned according to how a question is answered).
- **Randomizer**: Randomly present question blocks and other elements. Question Randomization allows you to randomize the order of the questions in your block, display only a subset of the questions, and even permanently hide certain questions.
- **End of Survey Element**: Even though you can easily change the default end-of-survey experience in Survey Options, you sometimes may want a different end-of-survey experience for different respondents.
- **Table of Contents**: You can use the Table of Contents (ToC) feature to allow your respondents to easily navigate between your question blocks while taking your survey.

10 - Other Survey Concepts

**Randomization**

There are many ways to randomize various elements of your Qualtrics Survey. You can randomize responses (use the question’s Settings gear), questions (use block settings), and blocks or pages (see above, Survey Flow Randomizer). There is a lot of flexibility in what you would like randomized, using the advanced options. You can randomize some or all of the items, or randomly provide a subset of all possible items.

**Recode Values**

When you create a question, a numeric value (known as a recode value) and variable label are automatically assigned to each answer choice. By default, the first answer choice will be coded as a 1, the second choice as a 2, and so forth, even if you remove answer choices or change the answer choice order.

These recode values and labels are recorded in the collected dataset and you can modify them to align with your desired statistical analysis.

**Loop and Merge**

Loop and merge allows you to present the same questions to a respondent multiple times. For example, if your block is a set of product satisfaction questions, you might want to repeat the block for each product the respondent has purchased.
Carry Forward

Carry Forward allows you to copy specific answer choices from one question and bring them into a future question in your survey. For instance, you can first show your respondents a question that asks which products they have bought from your company in the last six months. You can then carry forward the choices they selected into the next question and ask the respondents to rank their preference from those previously selected choices only.

Rich Content Editor

Wherever text is entered, you can choose the Rich Content Editor for more display options. Here you can take advantage of standard text editing options such as formatting, font, alignment, tables, bullets, adding hyperlinks, etc., as well as insert graphics, videos and. You can also Pipe Text such as survey responses or contact list data into your text for personalization.

Look and Feel

To add a progress bar, headers and footers, and change to another branded theme choices go to the Look and Feel module.

11 - Best Practices for Libraries and Sharing Projects

A Library consists only of what you choose to copy into it, whether it be all or part of a project (survey), files, contact lists, etc. A project that you create does not, by default, go to your personal Library. If you’re building a project that you want to share with a Group or with individual Qualtrics account
holders, but you do not want others to collaborate on the project, first finish creating it in your own account, then copy the entire project to a Group Library or user, via your main Projects page.

You also can copy Blocks to your Group Library as you create them, for sharing purposes. This is useful for projects/questionnaires that people in a group want to copy into their own projects (e.g. a standard demographics set of questions).

Keep in mind that you can only fully collaborate when you first Share a Project with another user. Important: The creator of any project owns that project, even if they have shared it with full permissions to others. If the creator deletes the shared project, it is deleted for all users.

If you have created a project that you no longer wish to own, contact the Brand Administrator (email oirp@queensu.ca) or your Division Administrator (if your unit has a Division) to transfer the survey to another Qualtrics account holder.
12 - Where to Find More Information

Qualtrics Online Resources

The Qualtrics website includes comprehensive and easy-to-follow help documentation. Tutorials, webinars and detailed directions are available via Qualtrics’ extensive online resource, Qualtrics Support.

Qualtrics Research Core (Getting Started page, comprehensive):
https://www.qualtrics.com/support/survey-platform/getting-started/survey-platform-overview/

More information on Qualtrics’ Check Accessibility Tool (survey creators should use this to help make their surveys accessible).

Queen’s Planning and Budgeting Survey Tool FAQ Page

Qualtrics 24/7 Technical Support

For fast, individualized support over chat, email or a scheduled phone call, please start here (scroll to bottom of page to access the choices as shown in the image to right):

www.qualtrics.com/support-center