Qualtrics

Qualtrics Training Objective
To learn the tools and features to get started using Qualtrics to create effective online surveys.

What you can expect to learn from this class:
- How to approach the Qualtrics interface
- How to use the tools available in Qualtrics to create surveys
- How to create new surveys and access the USF branded templates
- How to customize the settings of a survey
- How to create questions in Qualtrics
- How to apply logic to questions
- How to edit questions and the survey’s layout
- How to share surveys with colleagues
- How to distribute surveys developed in Qualtrics
- How to view the results of a survey
- How to use the reporting tools in Qualtrics
- How to download and export Qualtrics data

Who should take this class?
Anyone who wants to learn how to use Qualtrics to efficiently and effectively create surveys.

Qualtrics Tips and Shortcuts:
Access Qualtrics from the following URL: http://www.usfca.qualtrics.com
Getting Help: http://www.qualtrics.com/university
Getting Started

Before creating a survey consider how the survey will be used and the type of data you are interested in collecting.

1. Think through your objectives in creating the survey.
2. Who is the target population?
3. Provide information on the purpose of the survey and how best to complete it.
4. What will you do with the data, how will it be analyzed, and with whom will you share the results?

Steps for developing a survey in Qualtrics

1. Think through the intention and development of your survey questions.
2. Create a survey.
3. Add questions and logic.
4. Distribute the survey.
5. Analyze and share the results of the survey.

Help

Online Training using Qualtrics University:
http://www.qualtrics.com/university/researchsuite

Creating a Project

The Create Project button is on your homepage in Qualtrics.

1. Click on the Create Project button to begin a new survey. Choose from the following options:
   a) New Project: Build your project from scratch. Type in a project name and click Create Project.
   b) From a Copy: Choose an Existing Project from your library, then Provide a New Project name.
   c) From a Library: Copy a survey from the Qualtrics library. Use existing survey templates to begin with a survey that has been used before.
   d) From a file: Select any .QSF file that is stored in your computer

Once a selection is made you are taken to the Survey tab.

Blocks

Your survey must create at least one Block. A default question block will be created for you when you first create a survey.

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 five questions in your survey might be in a block called “Screening Questions”, and the last ten questions in a block called “Main Questions”. Choose Block Options in the upper-right corner of the Block to edit options.

To add a new Block, click on the Add Block link at the bottom right corner of the Block window.

Adding questions

Eighty different question types are available. Any time you change the question type, you can make changes to the format.

1. Click on the Create a New Question button to create a survey question. The default question type is multiple choice OR click on the Import Questions From button to choose questions already developed in another survey or in the Qualtrics library.
2. The Automatic Choices Feature will automatically create questions based on a typical question type. Click the check-box next to Automatic Choices to view the options. The editing panel is located to the right of the question.
3. Choose to add a Personalized Answer within the given selection of automatic answers by editing one of the answers or adding a new answer. Then click on the text to view a down-arrow to the right and choose, Allow Text Entry.
4. A Rich Text Editor is available for adding Bold, Italics, Underlined, etc. formatting. You can also add graphics, files and videos.
5. Exclude from Analysis is an option the system provides for question data that will not be included in any Qualtrics calculations, i.e., Mean, SD.

Question Types

1. Choose from a variety of question types, as there are 80 different item types. The four most commonly used questions are: multiple choice, matrix table, text entry, and descriptive text. Multiple choice is the default question type.
2. To change the question type, select Change Question Type located to the right side of the screen.
3. When you hover over a question type, a preview appears.
4. Select the desired item type.
Descriptive Text and Page Break

Choose the Descriptive Text item type to introduce a new block of questions or provide an introduction. To insert a Page Break, click on the Page Break option, located on the right side of the page.

Display Logic

Used when you would like to display a single question based upon a previous response. Typically used when you have a single follow-up question. Begin by clicking on the question you would like to display or not to display. Then choose Add Display Logic. Follow the question options, as desired.

Skip Logic

Used when multiple follow-up questions are involved. Use Skip Logic to have participants skip to other questions in the survey block or go to the End of a Block or End of Survey. Refer to the Survey Flow section below to learn how to incorporate expanded Skip Logic options.

Carry Forward Choices

Carry Forward allows you to copy answer choices from one question and bring them into a future question in your survey. For instance, you can first show a question to your participant asking which products they have bought from your company in the last three months. You can then carry forward the choices they selected into the next question where they can then rank their preference. Note: Make sure the question you are Carrying Forward is on a separate page or block than the question you are Carrying it Forward to.

Piped Text

With Piped Text, you can customize question and choice wording for each participant. When you add Piped Text to your survey, it will appear as a line of code, like this: ${mi://FirstName}. When participants take the survey, this code will be replaced with unique content. Note: Make sure the question you are piping from is on a separate page or block than the question you are piping to.

Look and Feel

The Look and Feel tool allows you to personalize the aesthetics of the survey, including the skin/theme, font, colors, header or footer of the survey. By default, a USF template will be applied to your survey to add branding to the survey.

To add your Department/School to the USF Template, choose the Header Text template from the list of templates, then click on the Advanced link. Type your Department or School name in the Header text box.
Copy Project

If you would like to make a copy of a survey and share it with another USF Qualtrics user, click the Copy Project option associated with the survey (click on the down-facing arrow to the far-right of the survey title). Choose Copy To: Other User, then type in the full account name, in our case it would be &lt;username&gt;#usfca (that is a hashtag). For instance, bansavich#usfca

Share Project

Use the Share Project option to allow you to share the task of building or analyzing your survey with another Qualtrics user. You can grant permissions for others to share the survey. You can grant permissions to others by allowing them specific functionality.

1. Select the Share Project option from the down-facing arrow to the far-right of the survey title.
2. You will first need to make sure that your colleague has logged into Qualtrics to create their profile.
3. After they have done that, you can search for and add him/her.
4. Once added, select the appropriate permissions and Save.

Survey Options

These are the permissions and settings that you will want to check before sending your survey out.

Note the following options:

- Allow respondents a back button if you would like your respondent the ability to go back as well as forward in the survey.
- Survey expiration dates. The default is one-week or 7 days.
- How partial responses are treated.
- Prevent Ballot Box Stuffing, if you don’t want people to take the survey more than once from the same computer.
- Anonymize Response. Do NOT record any personal information and remove panel association (not recommended).

It is important to review these before launching the survey.

Survey Flow

Survey Flow allows you to customize where participants go and what they see in your survey. It also gives you a quick overview of your survey and its subpages.

Participants will start at the top of the flow and work their way through until they reach an end point and finish the survey.
**Question Numbers**

The Q numbers (Q1, Q2, etc.) appear to the left of the survey questions. The questions are numbered based upon when the questions were added. If you would like to renumber the questions so that they are ordered sequentially. To do this, click on the **Tools** from **Survey** tab in the upper right-corner of the screen. Choose, Auto-Number Questions.

**Distributing a Survey**

**Survey Link:** The anonymous survey link doesn’t collect any personal information. Click on the **Distributions** tab to begin. Choose to activate your survey to collect responses by clicking on the **Single Reusable Link** option. Copy and paste the anonymous survey link into an email or webpage. It doesn’t collect any personal information and is designed for open access.

**Email Survey:** Click on the **Emails** link, then click on the **Compose Email** option. You are taken to the survey mailer, which allows you to select a list of responses. Don’t delete the three lines of code after the Follow this link to the Survey, as this is useful for managing the respondents (Follow this link to the Survey: `{l://SurveyLink?d=Take the Survey}`). And prevents individuals from taking the survey more than once or forwarding the link to others.

To begin:

1. Click on the **Contacts** tab then click on the **Create Contact List** button.
2. Create a Contact List Name.
   a. **Add Panel Members.** Most basic way to add a small number of panel members.
   b. **Import from a File.** Enables you to upload an Excel files with the panel member names. The file must be saved as a .csv file.
   c. **Import from a Survey.**
3. Once a survey panel is created, you can switch back to the **Distributing a Survey** tab.

**View Reports**

Click on the **Reports** tab to view the reporting options. Click on the **Stats** link in the top-right corner of the page to view quick stats about the survey.

In the **Reports** tab, click the **Initial Report** link to review the results of a survey. A summary of your data will be displayed. Use the question list in the left-hand panel to show/hide questions.

Select a question to view the results. Delete a table or graph by clicking on the x in the upper right corner of the chart or graph. Click on the **Add Graph** or **Add Table** button in the top right corner to view the relevant information. Select the **More** pull-down menu to see more options.
**Subgroup:** Add a subgroup to filter your data. Click on the Add Filter in the top left corner of the page.

**Add Filter:** Allows you to see multiple subgroups at once.

**Report Options:** Click on the Report Options menu on the right-side of the screen to select from a variety of reporting options.

### Responses

Use the **Data** section of the **Data & Analysis** tab to clean up your data or take a quick look at an individual response. In addition, use **Responses** to search responses, view responses statistics, view and delete Recorded Responses, View, close, delete, or download Responses in Progress, Import responses, Create a PDF report of an individual response, Issue retake survey links, Generate Test responses, Delete Survey Previews and Tests, or Imported Responses.

### Download Data

Download your raw data in a variety of formats (Excel and SPSS, etc.) for further analysis of your data.

### Cross Tabulation

Designed to show relationships among variables. Only used with multiple choice and matrix-type questions. Crosstabs are tables that can demonstrate relationships. $P$ values < .05 indicate that there is a strong relationship.
GUIDELINES FOR INSTITUTIONAL SURVEYS

Overview

These guidelines are issued by the Office of the Provost through the Center for Institutional Planning and Effectiveness (CIPE) and the guidelines are applicable to all large-scale surveys (more than 100 potential respondents). The following guidelines outline the process by which surveys can be administered to students, faculty, and/or staff at the University of San Francisco.

Goals/Purpose

These guidelines are issued as a way to prevent survey fatigue, the collection of invalid or unusable data, and to protect the privacy and confidentiality of the respondents. At a minimum, the guidelines should:

Increase the quality of the information collected through surveys to ensure that survey results can be used for evaluation, assessment, and planning;

Help the University to coordinate the timing and populations of surveys;

Have applicability to the furthering of the Mission of the University and the enhancement of the student experience.

Guidelines

Any survey administered by any individual associated with the University of San Francisco, with a desired sample of more than 100 students, faculty, and/or staff, is subject to these guidelines. Further, any individual conducting a survey (even those exempted and listed below) must contact CIPE to receive contact emails for populations or for randomized samples.

Some surveys or questionnaires are excluded from these guidelines (although feedback and review can still be provided by CIPE staff) these include:

One-time surveys for the purpose of event/program evaluation – that is, surveys sent to individuals that participated in a specific, one-time program or event (consultation is available through CIPE upon request)

Surveys administered within a course or a class

Faculty research surveys
In general, individuals not associated with the University of San Francisco cannot access the University community (faculty, students, staff, alumni) with surveys or other types of research. Exceptions are only granted by the Vice Provost for Academic Affairs.

These guidelines do not replace approval by USF’s Institutional Review Board for the Protection of Human Subjects (IRBPHS) when applicable.

Benefits to the Researcher

Staff in CIPE have worked in surveys and research administration for many years and have been trained in survey item writing, administration, and analysis. Meeting with CIPE staff for a survey review can lead to better or more clearly written items, a survey that is easier for the survey-taker, and perhaps a more streamlined survey tool. In addition, CIPE Staff can help to think about how to analyze the data that is collected and help choose a sample of survey-takers. CIPE also welcomes requests for consultation for any research project at USF.

Procedures

In order to achieve the goals listed above, the following steps have been established:

1. Before developing a large scale institutional survey, faculty and/or staff should consult with the Center for Institutional Planning and Effectiveness (CIPE). Involving CIPE early may speed up the process of survey creation. Questions can be directed to Linda Wong (mailto:wongl@usfca.edu)

2. Once the survey is developed, all basic information about the proposed survey is to be submitted to CIPE through DataAssist (https://usf.service-now.com/navpage.do) – including: a description of the survey project, a copy of the survey instrument, purpose and intended use of results, desired sample or population, and suggested timeline for survey administration. The purpose of this submission is not to limit or prevent survey administration, but to coordinate the timing, distribution, and to improve the quality of surveys through a review by CIPE staff. Survey respondent email addresses and other information will not be released without this submission.

3. After the request is submitted, CIPE will review the survey for method and design, sampling technique, data collection and will possibly provide feedback to the research (see best practices below).

4. After the review, CIPE will identify the sample or population to be surveyed, release the contact information, and work with the researcher to schedule the timing of the survey. Surveys are recommended to be administered through the USF supported survey tool, Qualtrics, and to comply with USF communication guidelines.
Survey Best Practices

The following is an established list of best practices for surveys, and will serve as the basis for much of the CIPE survey review.

Informed Consent

All surveys should disclose to survey takers why they should complete the survey, how the information will be used, how the data will be maintained (confidential, anonymous, etc.), approximate time needed to complete the survey, and whom to contact if they have any questions.

Ability to Opt-Out

Any surveys should notify participants that they are not required to complete the survey, and can opt-out. This opt-out should remove them from future communications about the survey (i.e., reminder emails).

Survey Length

Overall, the more concise a survey is, the more likely it is that survey-takers will complete it.

Item Clarity

Survey items should be easy to read and respond to. Common problems with items are confusing response scales, items that are double-barreled or ask more than one question, or items that are just unclear.

Beware of asking overly sensitive information

Asking for personal information can lead to a survey taker exiting your survey, please be aware what and how you ask.

Using samples is recommended

Simple Random Sampling or Stratified Random Sampling is a good way to gather information about your population in question. Depending on the kind of analysis planned, CIPE can help determine the number of survey takers to be invited. By using sampling, the number of surveys sent to any one individual is lower, and hopefully, the likelihood of response higher.
Definitions

Many statistical and research terms are used in these guidelines, please use the definition list below as a reference

Event/Program Evaluation

For the purposes of these guidelines, event/program evaluation refers to the direct evaluation of a program or event at USF that is only sent to participants of the event. The data from the evaluations is generally collected to gauge participant satisfaction, gain feedback on program delivery, or other program related information.

Population

A statistical term that refers to a group representing all available cases of interest. In the case of surveying, a population may be all undergraduates, all international students, or all of the USF community.

Sample

A subset of a population that can be evaluated to make inferences about the population in question. Samples are usually randomly selected from the available population. The sample size needed to make inferences about the population can be calculated by CIPE.

Survey

Although surveys take many forms for the purpose of these guidelines, a survey refers to any instrument used to collect information, typically electronically, from groups of interest.