Workshop Description:
Produce professional online surveys and obtain customized results with Qualtrics. At this workshop, participants will develop an understanding of the Qualtrics interface, question types, and survey options. The Office of Institutional Research will also present the tips and policies for conducting online surveys for JMU users.

Advanced registration and attendance are required to gain a user account and access to the software.

Workshop Objectives:
At the conclusion of the workshop, the participants will be able to:

- Describe the principles of creating effective online surveys
- Create and distribute an online survey with Qualtrics
- Identify and evaluate Qualtrics survey options
- Operate data collection, result attainment, and data export with Qualtrics

Agenda

- Discuss online survey best practices and policies for JMU users
- Navigate the interface of Qualtrics
- Create a practice survey
- Explore the types of questions
- Customize survey display
- Use page breaks, logic, and other editorial tools
- Monitor a survey with Survey Options
- Publish a practice survey
- Collect data with a practice survey
- Look at the initial report and report options
- Perform result edit, report distribution, and data export
- Explore additional features of Qualtrics
Access Qualtrics

1. Open a web browser window
3. The Qualtrics Login page will appear. Enter your Username and Password.
   
   **Note:** You will be given a training username and password for the workshop. After you complete the workshop you will be issued your own username and password.
4. Click Login.

---

Overview of All Surveys with My Surveys

After you successfully log in, you will see the Qualtrics “Dashboard,” **My Surveys**. My Surveys allows you to quickly create, edit and access your surveys. This view will also allow you to directly View Results and Distribute the Survey, among other options.
Create a Survey

1. Select the Create Survey tab.

2. Select Quick Survey Builder to begin constructing your survey.

3. Name your survey, create a Folder to organize your survey and click Create Survey.

Add Questions

1. Select Create a New Question.

2. Access the Question Type. Use the drop-down menu under the green button to select the question type (See the screenshot to the right).

3. Select the question type. Find the question type you need from the drop-down question list. Hover the mouse over each question type for a preview of the question display in the Example Area (See the screenshot below).
4. Navigate the complete list of question types. If you did not find the question type you need from this sample list, you can also expand the list by clicking the “Show All Question Types” at the bottom of the green window.

5. Click on Enter your question text here and type the question or copy from an existing Word or text file.

You can also click the Rich Text Editor option to access the (WYSIWYG- what you see is what you get) editor. With the Rich Text Editor, you can format the question description, insert graphics or symbols and view the HTML code with the “Source” button.
6. Click on **Click to write Choice 1** (2, 3, etc.) and type the response options, or copy and paste from an existing Word or text file.

7. Follow steps 1-6 to add more questions.

**Change Survey Title**

The title of a survey can be changed easily by just clicking on it in the survey edit view and typing the changes. In the same view, the survey can be re-arranged in a different folder with the **Select a folder for this survey** drop-down list to the right.
Edit Survey Questions

1. Edit a question using the basic editorial tools.
   Once a question is created, an editorial bar displays to the right of that question. You can populate or reduce the number of choices/statements/scale points with the plus and/or minus signs. You can also define the type of answers with Answers and determine the use of forced response with Validation Options.

   Note: The editorial tool bar is contingent to the question type you selected. Compare the three questions types (Multiple Choice, Text Entry, and Matrix Table) with the screenshots below.

2. Move a question in a survey:
   A question can always be moved up and down in the same survey with the move sign on the left. The move sign will appear once you click on the question.
Other Survey Editing Tools:

- **Page Break**  
  a. Select a question—the page break will be inserted below the selected question.  
  b. Click on **Add Page Break** (found at the bottom of the editorial tool bar for a selected question)

This is how the page break appears in the question list. The page break can be moved up or down using the arrows.

- **Display Logic**  
  a. Select a question—the display logic will be inserted within the selected question.  
  b. Click on **Add Display Logic** (found at the bottom of the editorial tool bar for a selected question).  
  c. Click **Save**.

This is how the display logic appears in the question list. Fill in the logic information to complete the skip logic process. Use the plus and minus signs to add or remove conditions.

- **Skip Logic**  
  d. Select a question—the skip logic will be inserted within the selected question.  
  e. Click on **Add Skip Logic** (found at the bottom of the editorial tool bar for a selected question)  
  f. Click **Done**.

This is how the skip logic appears in the question list. Fill in the logic information to complete the skip logic process.  
**If a specific answer is selected (OR not selected OR displayed OR not displayed) Then Skip to a specific question.**
• **Copy Question**

A question and its corresponding responses can be copied in the same survey to reuse again by selecting **Copy Question**. Copying a question can be helpful in easily reusing choices or questions that are worded in a similar way without rewriting the entire set of choices or the entire question wording.

• **Move Question**

The Move Question tool allows for picking up a question and allows for dragging and dropping the question to a new location. It allows for moving a question quicker than the slider tool to move questions, which forces moving only a single position per click.

• **Preview Question**

The Preview Question tool allows for viewing a question outside of the editing mode in the chosen template for the survey. It provides a better idea of what a question will look like to the survey respondent. The preview opens in a new window.

**Preview the Entire Survey**

Use the **Preview Survey** button at the top of survey to preview an entire survey.
Insert Graphics

Qualtrics enables graphics to be embedded in both question text and response choices. Graphics can be uploaded from a computer storage drive or from a complete URL. To insert an image in a question:

1. Select the question in which the image needs to be inserted.

2. Click the **Insert an Image** icon in the **Rich Text Editor** to insert a graphic in the question text.

3. If the image is already saved in the Graphics Library, simply click on it in the list that appears below and it will be added to the question. If the file needs to be uploaded to the Graphics Library, select **Upload a New Graphic**.

4. Browse for the image from the storage place in a computer, OR enter a full URL of the image. Next, enter the Category, Description, and adjust the Width and Height of the image. Click **Save**.
Customize Survey Display

The display of a Qualtrics survey can be customized with Look & Feel.

In the survey Look and Feel window, the survey creator can customize fonts, colors, the Header and Footer, Next Page/Previous Page buttons, a Progress Bar, and the number of questions per page for a survey, among other options. A template can also be selected for the display of a survey on a web page(s).

To insert an image in the Header or Footer of a survey so that it can appear on each page of an online survey:

1. Select Look & Feel in the survey that is being edited.
2. Click the edit link beside Header or Footer.
3. Insert an image from the Edit Header/Footer Rich Text Editor.
Monitor Survey Conduct with Survey Options

1. Survey Experience

   a. Select **Back Button** to enable survey takers to return to earlier pages in the survey.
   b. Select **Save and Continue** to allow users to resume partially completed surveys begun at an earlier time. Save and Continue can be problematic for surveys taken in public areas, since one user could potentially start a survey where a previous user on the same computer left off.
   c. Select **Show Export Tags** to show the export tags on the survey.
   d. **Use Custom Survey Validation Messages** allows you to customize validation message text.
   e. Select **Survey Language** to show your survey in various languages. Users must also have their internet browser set to the same language as the default selected here for the survey to appear correctly.
   f. **Survey Title** allows you to customize what text appears in the web browser
   g. **Meta Description** is the description used by search engines and social media services.

2. Survey Protection

   a. Select **Open Access** to allow anyone to take the survey if a survey is embedded or linked on a web page.
   b. Select **By Invitation Only** to limit it to only individuals who receive invitation emails.
   c. Check **Password Protection** to require a password to take the survey. Once the selection is checked, a password entry box will display.
   d. Check **Prevent Ballot Box Stuffing** to prevent users to take the survey more than once. Similar to the Save and Continue function, it can be problematic for surveys taken in public areas.
   e. Select **HTTP Referer Verification** to ensure the survey taker comes through a specific URL to take the survey.
   f. **Prevent Indexing** prevents search engines from indexing the survey.
   g. Select **Survey Expiration** to specify a date range for when the survey will be available.
3. Survey Termination

Select between using a default end of survey message, redirect to a single response report a customized message from the library, or to re-direct the survey respondent to a URL. You can also anonymize responses to prevent keeping a record of personal information.

4. Inactive Surveys

Select between using a default inactive survey message or a customized message from the library.

5. Partial Completion

Use the drop-down menu to choose whether or not to allow partially completed surveys, and if so, how long until partially completed surveys are recorded.
Publish a Survey

- Once a survey is created and ready for distribution, it can be published by clicking **Distribute Survey** tab or **Launch Survey** button.

- Launch a survey by clicking the **Activate your survey to collect responses** link on the next page.

1. Survey Link

- The link to the survey can always be accessed under the **Survey Link** button after the survey has been activated.

- Copy and paste the survey link in the email to the survey participants.

   **Note:** the link can be customized with the **Custom Link** tool at the right corner.

2. Social Media

Easily post your survey to a variety of social media platforms, such as Twitter, Facebook, LinkedIn, or Blogger. Select the **Social Media** button. Next, select the tool you would like to share the survey with and follow the on-screen instructions.

3. Popup Surveys

Create a popup survey by selecting the **Popup Survey** button.

Enter the **Popup Text** and **Link Text**, then select the **Add Popup to My Website** button to retrieve the HTML code for the popup survey.
View Survey Report

1. Select a survey and its corresponding Results from My Surveys view.

2. Under the View Reports option, select the name of the report you would like to open.

3. View, export and share a survey report from the View Reports option:

   In View Reports, the response rate of a running survey can be easily checked at the right-hand corner. The report can be exported directly to Microsoft Word, PowerPoint, Excel and Adobe PDF. It can also be shared with other people by selecting the Public Report option.
To share a report with an audience:

In the Make Report Public window, Turn on Public Report and Enable Password Protection. Then send the URL and password to the report reviewers.

4. Modify the display of a report with Report Options. For example, the number of questions per page to be displayed in a report can be customized.
5. Modify the display of a report by adding and editing graphics and tables.

Graphics and/or tables can be added to each question in a report by the commands of **Add Graph** and **Add Table**. Once a graphic and/or table is added to the report, modification can be done by hovering the mouse cursor over the graphic or table and displaying the **Graph/Table Options**.

![Graphic and Table Options Menu](image)

- **Graph Options**
  - Data Source
  - Sort By
  - Show Values
  - Truncate Labels
  - Graph Renderer
- **Decimals**
- Show/Hide Columns
- Export Graph To...
- Remove Graph

Drag the triangle handle to customize the dimensions of the graph.
Responses

The Responses section provides the options of searching the collected data by certain filtering criteria, such as Response Type and Start/End Date, as well as looking at Recorded Responses and Responses in Progress. It also enables deletion of selected response set by checking those that may contain errors. The Advanced Options provides choices of deleting survey previews, imported survey responses, and/or all responses. In addition, Advanced Options includes an Import Responses option allowing previous data in CSV file form to be uploaded and merged with the current Qualtrics survey data set.

Note: If a particular response set is selected for removal, a pop-up window will ask you to confirm.
Download Data

In the Download Data window, data can be downloaded by selected questions, time range, and diversified formats.

Note: To select the questions that you want to download data, on a Windows computer, the sequential selection can be done by holding the Shift key on the keyboard while clicking the question. Otherwise, the Ctrl key can be used to do non-sequential selection. On a Mac computer, the sequential selection is the same as on a Windows computer; while non-sequential selection can be done by the combination of holding the Command key (⌘) and clicking the questions.
Recode Values & Variable Naming

Qualtrics allows for customizing the coding and variable names of answer choices for each question for data analysis purposes at the conclusion of the survey.

1. Begin by clicking the purple drop down button to the left of the question.

2. Select **Recode Values** from the menu. A new window will open.

3. Check the Recode Values box in order to recode answer choice values and/or check the Variable Naming box in order to change the variable names for answer choices.

4. Enter the new coding for choices in the yellow boxes and/or enter the variable name options in the pink boxes.

5. Select **Close** when finished.
Randomization

Qualtrics allows for randomizing the presentation of both questions and answer choices in a survey.

*Choice Randomization- Randomizing the choices of a single question*

1. Begin by clicking the purple drop down button to the left of the question.

2. Select **Randomization** from the menu. A new window will open.

3. Choose to have no randomization, randomization of the order, randomly presenting a certain number of choices, or set up advanced randomization.

4. Select **Close** when finished.

*Question Randomization- Randomizing questions within a block*

1. Begin by clicking the **Block Options** button in the upper-right hand corner of a block.

2. Select **Question Randomization** from the menu. A new window will open.
3. Choose no randomization, randomizing the order of question, presenting only a specified number of the total questions, or set up advanced randomization.

4. If the advanced randomization option is selected, manually set up randomization options using the Block Question Flow, Randomized Questions, Random Subset, Unused Questions, and Questions per Page options.

5. Select Save when finished.
Additional Features in Qualtrics

Qualtrics Libraries

Qualtrics provides several libraries for survey creators to manage the surveys, questions, graphics and messages. The items in the libraries can be pre-designed by Qualtrics, created by individual users, or created by a group of users.

Survey Library:

The Survey Library provides a repository to store the surveys that can be repeatedly used. Using the Current Library dropdown menu, you can toggle among the survey libraries pre-designed by Qualtrics or created by individual users or groups. Surveys in the Survey Library can also be organized by folders. The surveys in the library can be viewed, modified with Options, copied, and deleted.
**Question Library:**

The Question Library manages questions that can be repeatedly used. The layout of the Question Library is the same as the Survey Library. Using the Current Library drop-down menu, you can toggle among the survey libraries pre-designed by Qualtrics or created by individual users or groups. Questions in the Question Library can also be organized by folders. The questions in the library can be viewed, modified with Options, copied, and deleted.

**Graphics Library:**

The Graphics Library helps to organize images uploaded by Qualtrics, an individual Qualtrics user, and groups of Qualtrics users. The Question Library also enables easy access to insert images in the header, footer, question description and response item in an online questionnaire when creating a Qualtrics survey. Similar to the other libraries, graphics in the Graphics Library can also be organized by folders. The layout of the Graphics Library is the same as both the Survey Library and Question Library with one exception: you must click on a particular image to get the Question Library options, which include editing, copying, deleting, and viewing.

**Message Library:**

The Message Library enables the user to create an End of Survey Message or an Inactive Survey Message. While it also has the option to create Invite, Reminder, and Thank You Emails, JMU does not support the mailing functionalities in Qualtrics without the Panel feature, so they will not be of use to standard JMU users.

The layout, folder management, and Message Library options are the same as the Survey, Question, and Graphics Libraries.

**Note:** For JMU policy about sending information electronically to students and employees, please refer to Bulk Email Request FAQ at: [http://www.jmu.edu/computing/is/bulkemail/faq.shtml](http://www.jmu.edu/computing/is/bulkemail/faq.shtml)
**Build Logic with Blocks**

In Qualtrics, both linear and non-linear logic in a survey can be monitored with blocks. By default, Qualtrics enables questions to be added to Default Question Block. A block can house a different section of questions in a survey. For instance, the Having Blackboard Teaching Experience block and the Needs & Demographics block in the screenshot below have multiple questions in each block.

To create a block, click **Add Block** option under the **Advanced Options** menu.

![Survey Flow](image)

To arrange the blocks according to the designed logic relation, select **Survey Flow**. Then in the Survey Flow window, use **Edit Condition** and **Add a New Element** to determine the logic in a survey.

The screenshot below shows the survey flow of a questionnaire survey for alumni from an undergraduate program. Based on the respondents’ choices about their experiences post-graduation, they are branched to different sets of questions.

![Survey Flow](image)
Advanced Survey Elements

Qualtrics also provides numerous advanced survey element options, including Scoring, Translate Survey, Triggers, Quotas, and Conjoint. These options can be located through the link Advanced Options menu in the survey editing mode.

The uses of these elements are case-specific. If there is a need of using these, please contact the Office of Institutional Research or the Center for Instructional Technology for a house call or a customized training.

Support Resources

For more information about Qualtrics functionalities, please use the Qualtrics help site. Qualtrics has an array of videos, articles, webinars, and customer support to assist you with every aspect of the software. You can access all of the Qualtrics help options by selecting the yellow Help button in any of the Qualtrics menus.