



Creating Online Surveys with Qualtrics

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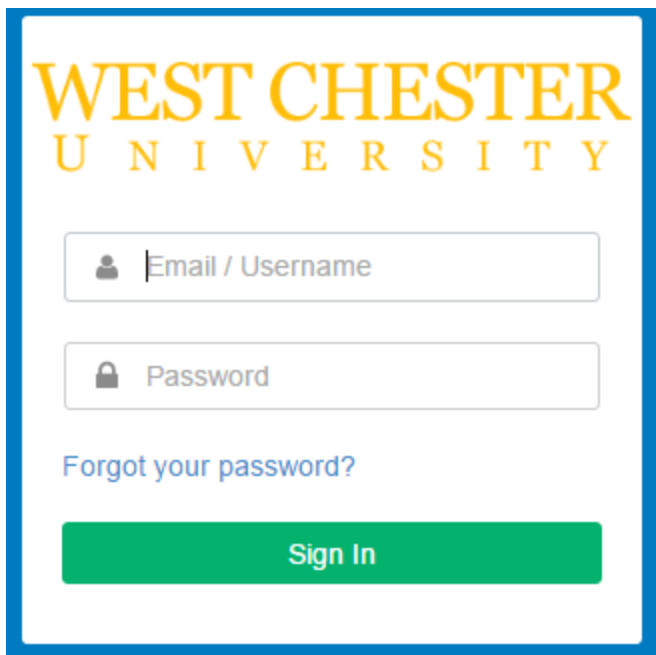
Introduction

Qualtrics is web based software that allows the user to create surveys and generate reports without having any previous programming knowledge.

Logging In

Qualtrics is available to all West Chester University faculty, staff and students.

1. To log into Qualtrics, type **wcupa.qualtrics.com** into the URL bar of your browser.
2. Then enter your West Chester University username and password.
3. Click **Log In**.



WEST CHESTER
UNIVERSITY

Email / Username

Password

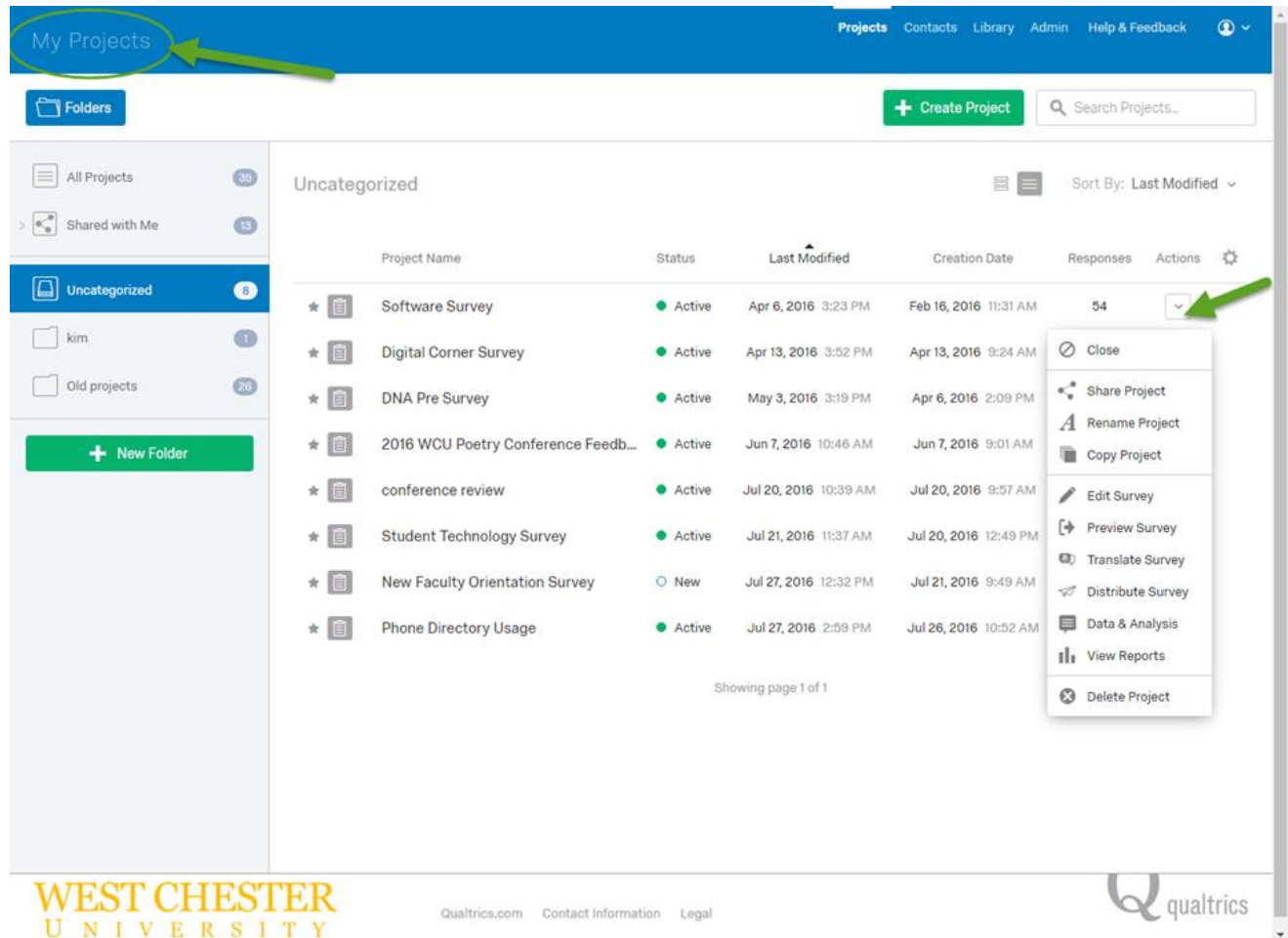
[Forgot your password?](#)

Sign In

If you are a first time user, you will be required to **Accept Terms of Service.

Navigation

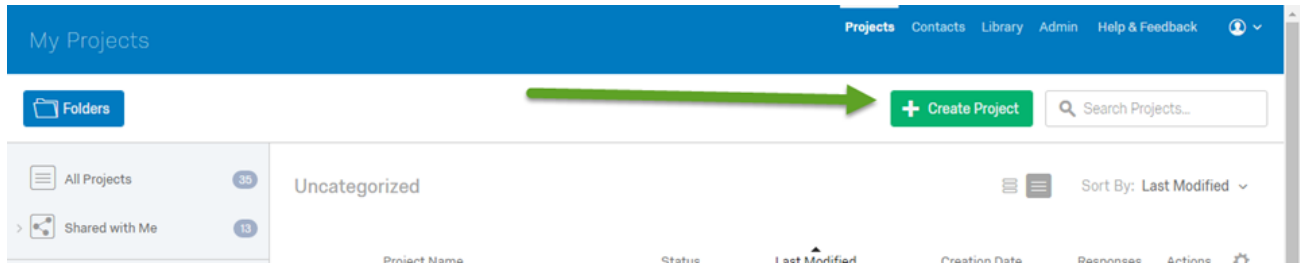
My Projects



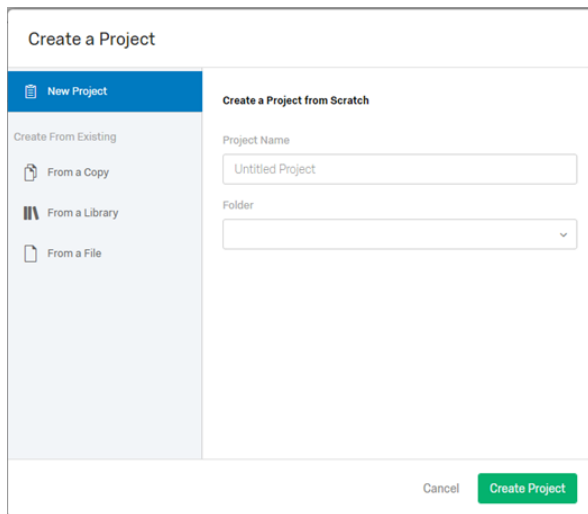
The My Projects heading is essentially your homepage, containing the surveys you have created. These surveys can be organized by the number of responses collected and the date last modified by clicking on the titles at the top of the column.

To the right of the survey name, under the **Task** column, there is a dropdown list of icons for each survey. Most of these icons serve as shortcuts to various tabs within Qualtrics. For example, clicking on the Edit icon will lead you to the Edit Survey tab.

Create Project



To create a survey, click on the **Create Survey** tab in the upper left hand corner of Qualtrics.

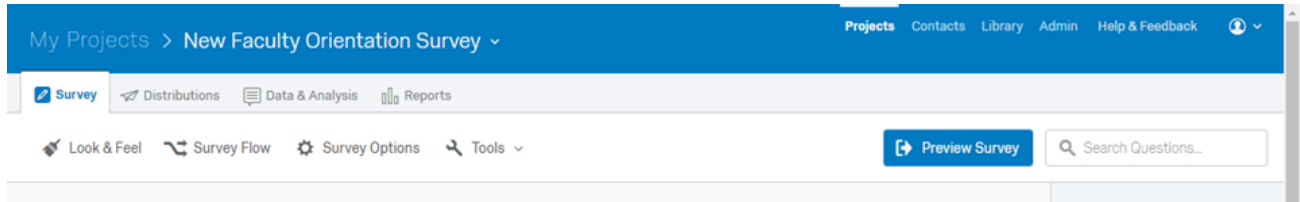


There are three ways to create a survey within Qualtrics.

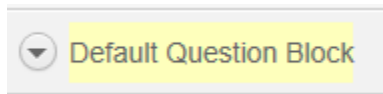
1. **Create a survey from scratch:** This is the most commonly used survey tool, allowing you to create a survey from scratch.
2. **From a Copy:** Allows you to create a survey based on an existing survey
3. **From a Library:** Allows you to choose a survey template from within Qualtrics.
4. **From a File:** Allows you to upload a document to create a survey

Once one of the above options is chosen, and the survey is named the creator will be brought to the **Edit Survey** tab.

Edit Survey



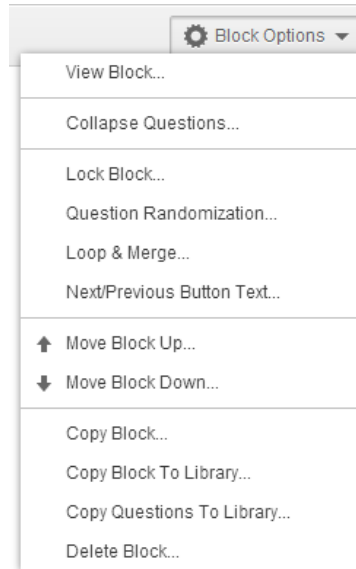
Default Question Block



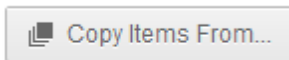
A question block is similar to a page or screen within your survey. All surveys must contain at least one block. To **rename the page** double click on Default Question Block, on the upper left hand corner, and enter the new page title. Questions entered within the same block will appear on the same page. If there are a large amount of questions, you can add a block by clicking the **Add Block** button on the bottom right hand corner of the screen.

There are many editing options within the block. To view these options click on the **Block Options** button in the upper right hand corner. These options include:

- Question Randomization
- Loop and Merge
- Move Block Up or Down
- Copy Block
- Delete Block

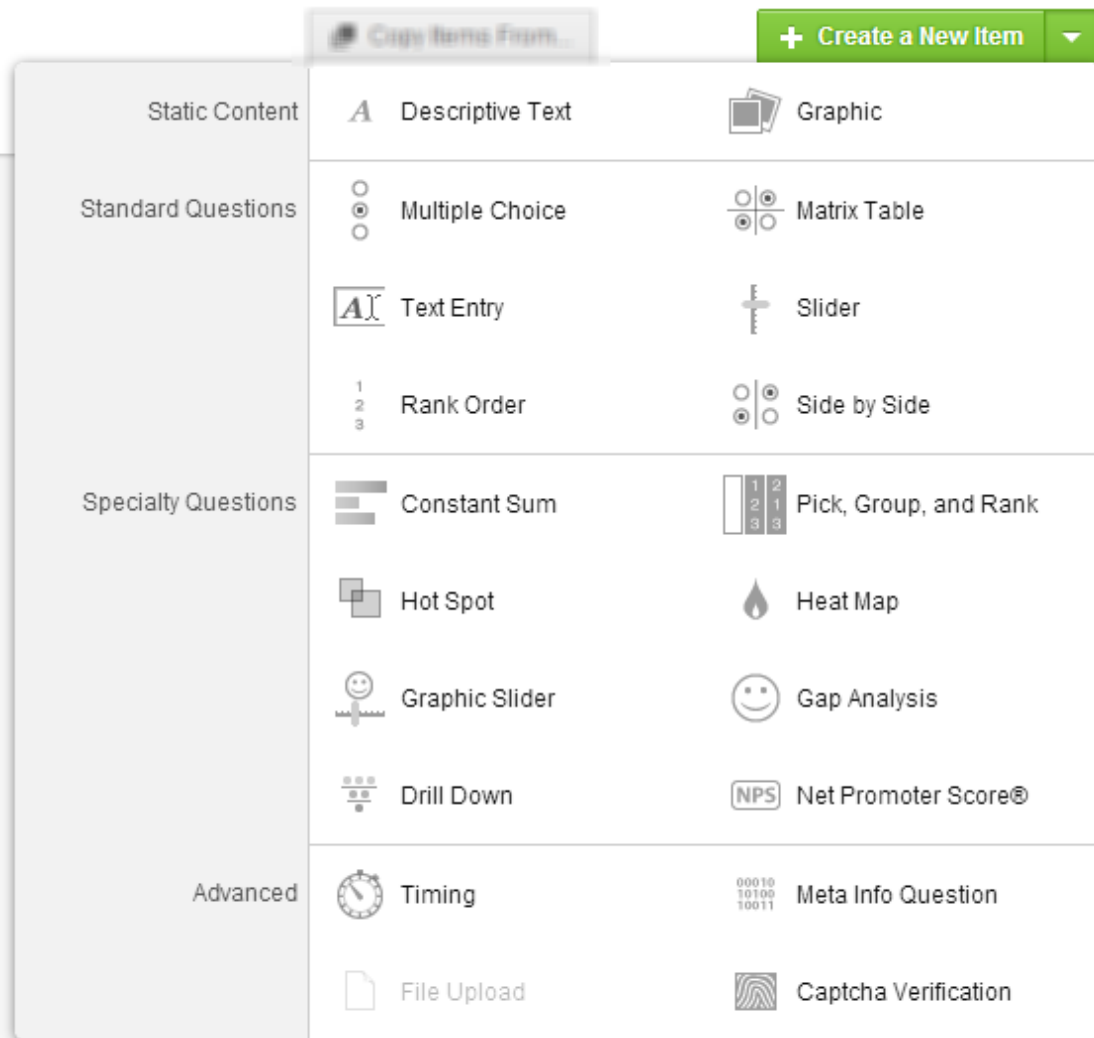


Creating Questions



Copy Items From: Allows you to access questions from the Qualtrics library or other surveys you have created.

Create a New Item: By default, questions will appear in multiple choice format. To change the question type, select from the drop down arrow to the right of **Create a New Item**. **Note:** An example of each question type can be viewed by hovering your mouse over each choice.



Mock Survey Questions

1. (Multiple choice) *“What is your gender?”* Then click outside of the title box.

Note: As you add questions to the survey, Qualtrics may recognize key words and automatically fill in answer choices. For example, when *“What is your gender?”* was entered, Qualtrics automatically entered *“Male and Female”* as answer choices. Each answer choice can be edited by clicking (highlighting) the answer option and renaming it.

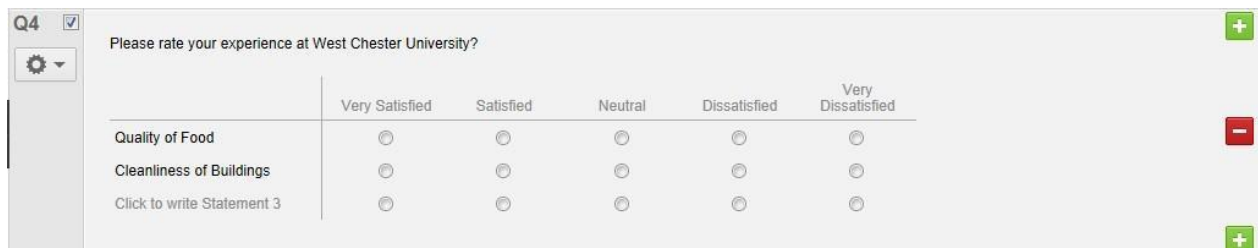
To add the next question, click on the bottom plus sign to the right of question #1. **Note:** Since the previous question was multiple choice, the following question will be multiple choice.

2. *“What is your position at the University?”* Qualtrics did not recognize this question, therefore automatic answer choices weren’t provided. Click on the first choice and type *“incoming student”*, for the second type *“current student”*, and for the third type *“graduate student”*.
3. For the third question, select the **Create New Item** option (highlighted in green) underneath the questions. Then select **Text Entry** from the dropdown. Title this question *“Please describe your experience at West Chester University.”* For this question type, the respondent will be given a text box in which they will type their experience.
4. For the fourth question, select the **Create New Item**. Then select **Matrix Table** from the dropdown. For the question title type *“Please rate your experience at West Chester University”*.

When question 4 is selected, a toolbar will appear on the right hand side. Under **Scale Points**, click the **plus sign** until it says 5. Notice that the table has adjusted.

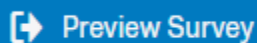
Fill in the following:

Statement 1: Quality of Food
Statement 2: Cleanliness of Buildings
Statement 3: Student Involvement
Scale point 1: Very Satisfied
Scale point 2: Satisfied
Scale point 3: Neutral
Scale point 4: Dissatisfied
Scale point 5: Very Dissatisfied



The screenshot shows a survey question titled "Please rate your experience at West Chester University?". Below the title is a matrix table with three rows and five columns. The columns are labeled "Very Satisfied", "Satisfied", "Neutral", "Dissatisfied", and "Very Dissatisfied". The rows are labeled "Quality of Food", "Cleanliness of Buildings", and "Click to write Statement 3". Each cell in the matrix contains a radio button. On the right side of the matrix, there is a toolbar with a green plus sign at the top, a red minus sign in the middle, and another green plus sign at the bottom.

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Quality of Food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cleanliness of Buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Click to write Statement 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

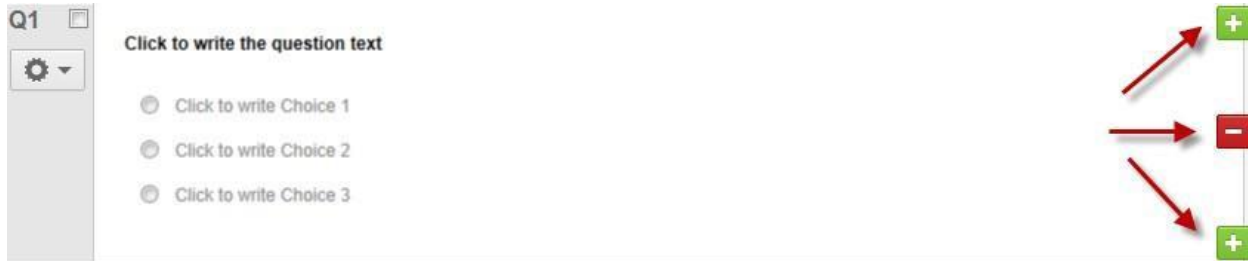
 Preview Survey

To view the survey created click **Preview Survey** under the Edit Survey tab.

Note: The survey will appear in a new tab.

Adding and Removing Questions

When a question is selected, plus and minus signs will appear on the right side of the screen. To **add a question** above the selected question, click on the upper plus sign. To add a question underneath the selected question, click on the lower plus sign. To **delete a question** all together, click on the red minus sign.

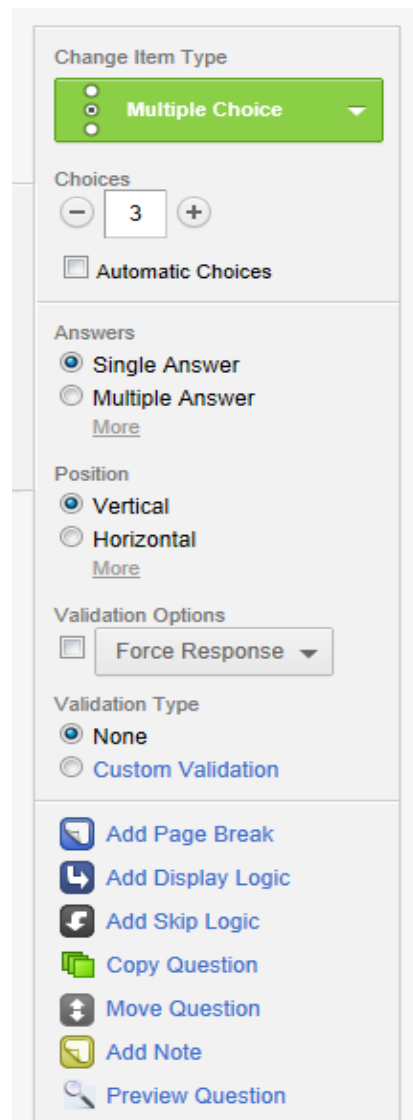


Edit Questions

To edit a question, simply click on the question itself. Once a question has been selected, a toolbar will appear on the right side panel. This toolbar will provide a variety of options according to the question type selected. For example, a multiple choice question allows you to adjust the number of answer choices provided. You can also select whether a single answer or multiple answers can be chosen. For all question types, you can require the respondent to answer the question via **Validation Options**.

To edit the **question title**, click on the title to rename it. **Question answers** can also be edited by clicking on the answer choice and renaming it. To allow text entry as an answer choice, click on the drop down next to the answer choice and select **Allow Text Entry**. This will allow the respondent to type in an answer, rather than choosing from your given options. To insert an image or graphic as an answer choice, choose **Insert Graphic** from the drop down next to the answer choice. Then choose a graphic from the library or upload a new graphic (in the upper right hand corner).

The question style can be edited by clicking on the title and selecting **Rich Content Editor**. You can view each question in **HTML View** or **Normal View** by clicking on the question title and selecting each option in the right hand corner.



Question Numbering

Questions are numbered in the order they were added to the survey. Note: When the question placement changes, question numbering will not automatically update. This does not have any effect on the survey order itself since the order is based on the visual layout of the questions, not their numbers.

Qualtrics allows you to **Re-number** your questions so that they are in order. This is beneficial when it comes to exporting survey data into Excel. To renumber the questions:

1. Go to the **Edit Survey** tab for the survey you wish to re-number
2. Click the **Advanced Options** drop-down in the upper right corner and select “**Auto-Number Questions**”
3. Then choose how you wish to number the questions.

Moving Questions

Questions can be moved throughout your survey multiple ways. As previously stated, a toolbar on the right appears when a question is selected. Towards the bottom of this toolbar, there is a **Move Question** option. Move your mouse to where you would like the question to appear, then click. To move **multiple questions**, check the small box next to the question number, then click on the double headed arrow to the left of the question.

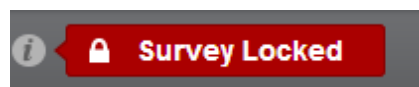
Trash/Unused Questions

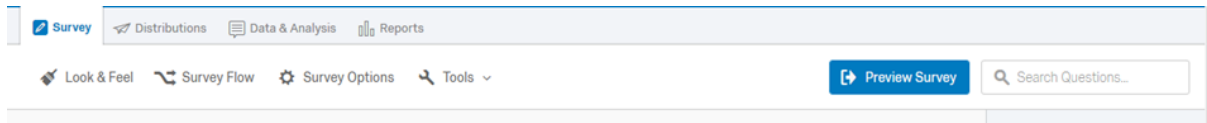
Questions that are deleted from the survey will appear in the Trash/Unused Questions section at the bottom of all questions. You can use a question that has previously been deleted as long as you have not emptied the trash. Select the desired question, and click **Restore** to bring the question back into your survey. Then move the question as needed.

To empty the trash, click **Empty Trash** in the upper right hand corner of the section. A confirmation dialogue box will appear. Then select **Yes** or **No**.

Locked Survey

If the survey already has respondents, the survey will appear **locked**, when editing, to prevent invalidation of the collected responses. The survey can be unlocked by clicking on the “i” button to the left of the lock.





Survey Tab

- **Look and Feel:**
 - General: Add next and back button, add progress bar, edit number of questions
 - Fonts: Change font style, size, change question text, change choice text
 - Colors: text, borders, background, header, footer, etc.
 - Advanced: Edit header and footer, external or custom CSS
- **Survey Options**
 - Survey Experience:
 - Back Button: Enable respondents to change their responses
 - Show Question Numbers: shows question numbers
 - Survey Language: Translate the language the survey is written in
 - Survey Protection:
 - Password Protection: A password must be entered to take the survey
 - Prevent Ballot Box Stuffing: Stops users from taking a survey more than once
 - Survey Expiration: The survey will only be available for a specific date range
 - Partial Completion:
 - Set time frame for partially completed responses data is recording.
 - Response Set:
 - Place responses into categories. View results for different collection periods.
- **Survey Flow**
 - Move, duplicate, and delete question blocks.
- **Print Survey**
 - Create a hard copy of the survey or convert the survey to PDF
- **Spell Check**
 - Use this feature to proofread your survey before sending it to potential respondents

- **Preview Survey**

Allows you to see and take the survey as if you were a respondent

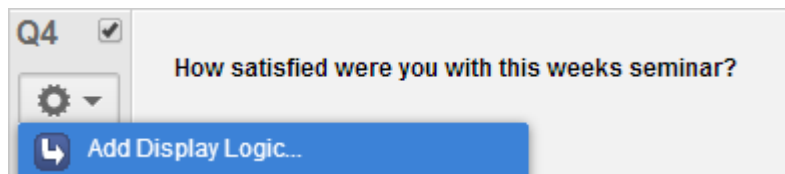
Note: The survey will appear in a new tab. To go back and edit click back to the other tab.

Display Logic

Display logic helps you create a survey relevant to your respondents by displaying or hiding certain fields based on answers selected.

To set up Display Logic:

1. Select **Add Display Logic** from the **Advanced Question Options** dropdown under the question you wish to hide or display.



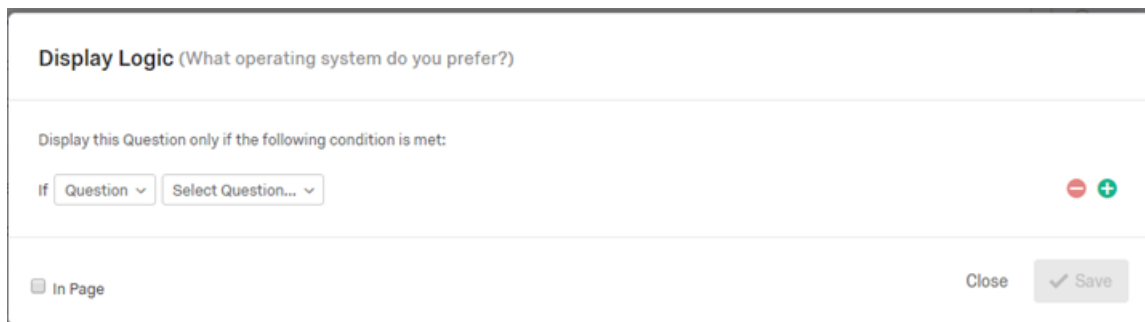
2. Set the condition that must be met for the question to display. The condition can be based on any of the following:

Previous Question: Display a question according to the respondent's specific answer to a previous question.

Embedded Data: Use any other information you have stored about the respondent to determine whether or not a question is shown. For example, only display a question to those who have an Embedded Data Age field equal to 25.

Quota: Once a Quota has been created, you can set a condition based on whether or not the quota has been met.

Panel Field: Base the condition on information already stored in a Panel Field, such as First Name, Last Name, or Primary Email.

A screenshot of the 'Display Logic' configuration window. The title is 'Display Logic (What operating system do you prefer?)'. Below the title, it says 'Display this Question only if the following condition is met:'. There is a dropdown menu set to 'Question' and a 'Select Question...' button. To the right of these are red and green minus and plus signs. At the bottom left, there is an 'In Page' checkbox. At the bottom right, there are 'Close' and 'Save' buttons.

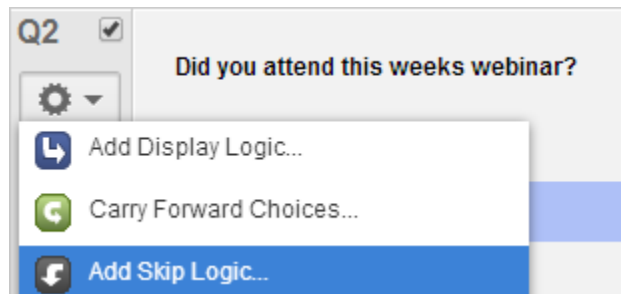
3. Click **Save** to apply the logic.

Skip Logic

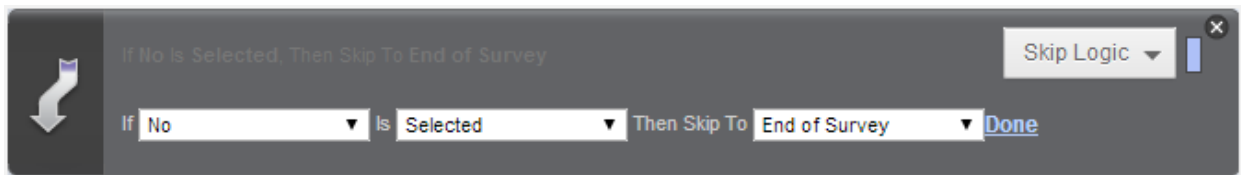
Skip logic creates a custom path through the survey that varies based on a respondent's answers. This option is usually used when multiple answers are to be skipped.

To set up Skip Logic:

1. Select the question to which you would like to add Skip Logic.
2. Select **Add Skip Logic** from the **Advanced Question Options** drop-down.



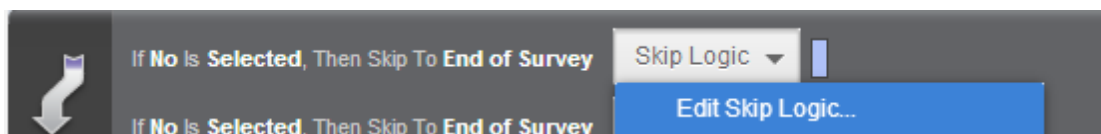
3. Select the **answer choice** to use in the first drop-down. Then select where the respondent will be **redirected** in the last drop-down.



4. Click **Done** to apply skip logic.

Edit Skip Logic

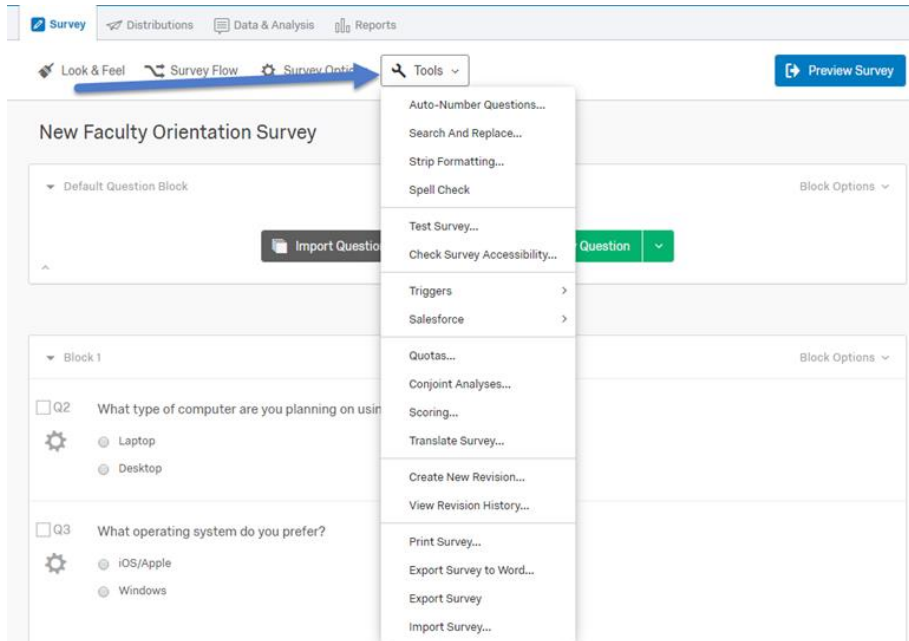
Allows changes to be made to the skip-logic statement.



Delete Skip Logic

To delete Skip Logic select **Remove Skip Logic** from the **Skip Logic** drop-down.

Tools



- **Strip Formatting**
 - Allows you to remove all text formatting from questions and return them to default.
- **Auto-Number Questions**
 - Allows you to automatically renumber your questions. Remember that these numbers will not appear to the audience.
- **Triggers**
 - A trigger can be used to send an email message to yourself or others each time a survey is completed.
- **Quotas**
 - Set based on responses to a question or based on embedded data.
- **Translate Survey**
 - Allows you to create foreign translations of your question and answer choices, either using "google translate" or by typing your own translations.
- **Scoring**
 - Scoring allows you to set point values for multiple choice, matrix, and text entry questions.
- **Test Survey**
 - Allows you to generate responses to your survey before you actually collect data.

Export Survey

Download your survey as a .QSF file to use as a backup file. Or download a Word document which you can use for a paper version of the survey or as a reference sheet for the coded values of your answer choices.

To export your survey:

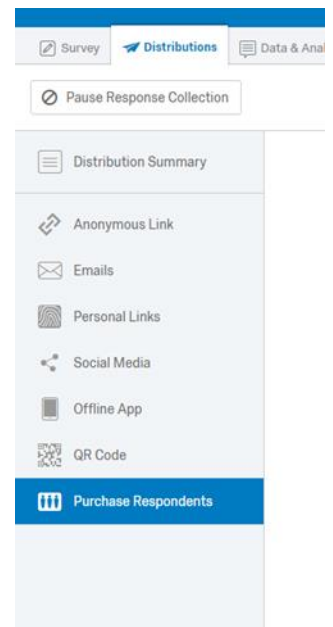
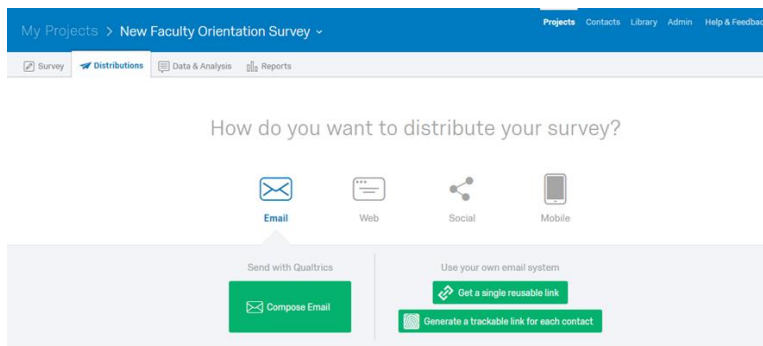
1. On the Edit Survey page, select **Advanced Options**.
2. Select **Export Survey** or **Export Survey to Word**.
3. Select to **Download** or **Save** the file in the browser download box (with Internet Explorer, you might need to click on the yellow bar at the top of the page to give it permission to download the file).

Import Survey

To import a survey, simply open the Advanced Options menu on the Edit Survey page and select to Import Survey. There are two options for importing a survey.

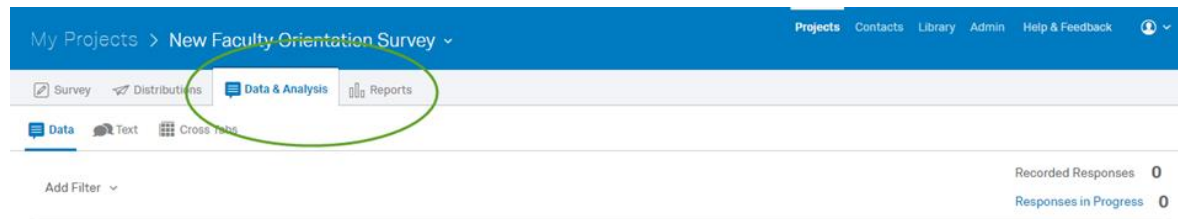
1. .QSF – This would be a survey you had created and exported, or that someone else had created and sent to you. The survey will import without any further formatting.
2. .TXT – The text file option is appropriate in an automated system, where you have a back-end program that automatically generates .TXT surveys for you to import. Generally, if you are creating surveys yourself or bringing a survey in from another survey platform, it is quicker and easier to simply recreate it within Qualtrics.

Distribute Survey



- **Anonymous Link:** Provides the URL link which you can copy and paste to your audience
- **Emails:** Allows you to send your survey via Qualtrics email
- **Personal Links:** Generate custom personal link
- **Social Media:** Allows you to imbed the survey link to a social media site
- **Offline app:** Used to display a link to website visitors on a tablet or smartphone without an internet connection
- **QR Code:** Code for survey to download
- **Purchase respondents:** You may purchase a panel of respondents from Qualtrics

View Results



Data & Analysis

- In the Data and Analysis Module you can do the following:
 - View, filter, tag, and delete Completed Responses
 - Perform text analytics on Text Entry questions
 - Create cross tabulations
 - View, close, delete, or download Responses in Progress
 - Export and import responses
 - Create a PDF report of an individual response
 - Issue retake survey links
 - Delete Survey Previews, Survey Tests, and other types of responses.

Reports Tab

- In the Reports module, you can view answer summaries and create custom pages to visualize and manage aggregate results.
 - **Create and View Cross Tabs:** Create and view cross tabulation charts for questions in your surveys.
 - **Publish Report:** Make an interactive version of all your pages available for online viewing.
 - **Export Report:** Export a PDF, Word, or CSV version of your report, as well as view previous exports.
 - **Rename Report:** Edit your report name.
 - **Schedule Report Email:** Set up a recurring email that sends your report to chosen individuals.
 - **Delete Report:** Delete your entire report (including all filters, custom pages, and question pages).

Collaborate

Collaborating gives you the ability to share and edit surveys with other users. To collaborate with other users, click on the **Share project** option on the drop down menu on your project list. To share the survey, enter their username. If the individual is not a Qualtrics member, an email address can be entered. Then press **Save**.

Project Name	Status	Last Modified	Creation Date	Responses	Actions
★ Software Survey	● Active	Apr 6, 2016 3:23 PM	Feb 16, 2016 11:31 AM	54	⌵
★ Digital Corner Survey	● Active	Apr 13, 2016 3:52 PM	Apr 13, 2016 9:24 AM		Close
★ 2016 WCU Poetry Conference Feedb...	● Active	Jun 7, 2016 10:46 AM	Jun 7, 2016 9:01 AM		Share Project
★ conference review	● Active	Jul 20, 2016 10:39 AM	Jul 20, 2016 9:57 AM		Rename Project
★ Student Technology Survey	● Active	Jul 21, 2016 11:37 AM	Jul 20, 2016 12:49 PM		Copy Project
★ Phone Directory Usage	● Active	Jul 27, 2016 2:59 PM	Jul 26, 2016 10:52 AM		Edit Survey
★ tes	○ New	Aug 2, 2016 9:53 AM	Aug 2, 2016 9:43 AM		Preview Survey
★ DNA Pre Survey	● Active	Aug 8, 2016 1:28 PM	Apr 6, 2016 2:09 PM		Translate Survey
★ New Faculty Orientation Survey	● Active	Aug 10, 2016 9:15 AM	Jul 21, 2016 9:49 AM		Distribute Survey

The 'Share Project' option in the dropdown menu for the '2016 WCU Poetry Conference Feedb...' project is circled in green, and a blue arrow points to it from the right.

Accepting Shared Survey

When another user sends a survey to collaborate, you will receive an email notification. When you log into your Qualtrics account, the shared survey should appear in your **Shared with Me** folder. IF it does not appear, refresh your browser.

