Basic Use of Qualtrics
Instructional Materials for OPWL 530
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This guide will help you learn how to set up a Qualtrics account as a student at Boise State University, and how to create and distribute a survey, and view and download the survey results.

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1. Create a Qualtrics Account and Sign into Qualtrics

Qualtrics is an online data gathering tool that can be used to create surveys or polls for research and evaluation. You can use the BSU-licensed Qualtrics system.

1. Go to http://oit.boisestate.edu/software/qualtrics/ and click LOGIN TO QUALTRICS.

2. Depending on whether you have already created a Qualtrics account before or not, follow the instructions on that page to create an account or log into your account. You must use your Boise State’s Bronco username and password.

3. After you log into the Qualtrics system, you will see a screen that looks like this:

4. When you need more information while following the directions in this document, please refer to Qualtric’s support website where you find job aids on various features - https://support.qualtrics.com/.
2. Create Survey

Scenario: Imagine that you need to convert the following survey questionnaire on a paper to a web-based survey form. The survey form contains 5 questions, as shown below - a Likert scale question, a set of three 5-point scale questions, a rank-order question, a yes/no question, and an open-ended question. In this example, various types of questions and response scales were used for your practice purpose. However, please keep in mind that for the survey questionnaires that you will use in your evaluation project, you may use the same response scale for most questions, in order to generate consistent data to be analyzed with a rubric.

Q1. The instructor was well prepared for the workshop.
   ___ Strongly Disagree   ___ Disagree   ___ Neutral   ___ Agree   ___ Strongly Agree

Q2. How would you rate your experience with the following components of the workshop?

   Online registration process
      ___ Very Dissatisfied   ___ Dissatisfied   ___ Neutral   ___ Satisfied   ___ Very Satisfied
   Quality of the handouts
      ___ Very Dissatisfied   ___ Dissatisfied   ___ Neutral   ___ Satisfied   ___ Very Satisfied
   Total length of workshop
      ___ Very Dissatisfied   ___ Dissatisfied   ___ Neutral   ___ Satisfied   ___ Very Satisfied

Q3. Rank-order the topics introduced during the workshop in terms of the relevance to your job (1 being most relevant and 3 being least relevant):

   ___ Customer service
   ___ Team building strategies
   ___ Phone etiquettes

Q4. Would you recommend this workshop to your co-workers?

   ___ Yes
   ___ No

Q5. What would you suggest to improve the quality of this workshop?
To create a new survey,

1. Click the **Create Project** button, and a small window will open. Then, under the **New Survey** tab, add a survey name (e.g., Workshop Survey) and click **Create Project** on that small window.

2. Now, you see a screen like this one:
3. By default, a Multiple Choice type question will appear as Q1.
   
a. Keep Multiple Choice under Change Question Type.

b. Under Choices, click the plus sign (+) to increase the number to 5 because Q1 uses a 5-point Likert scale.

c. Checkmark Automatic Choices and keep the default Disagree – Agree in the drop-down menu.

d. Under Position, select Horizontal.

e. Select the question box and revise the Q1 statement (The instructor was well prepared for the workshop).

f. Change the Neither Agree nor Disagree scale point to Neutral. You have completed Q1.
4. You will design Q2 with a **Matrix Table** type.

   a. Press the down-arrow next to the **Create a New Question** button and select **Matrix Table**. Now Q2 is created.

   ![Create a New Question](image1.png)

   ![Matrix Table](image2.png)

   b. Under **Statements**, keep the number 3, since Q2 has 3 components to rate.

   c. To design with a 5-point Likert scale:
      c.1. Under the Scale Points, checkmark **Automatic Statements**.
      c.2. Select **Dissatisfied – Satisfied** in the drop-down menu.
      c.3. Set the number to 5 to make it a 5-point scale.

   d. Write the Q2 statement (How would you rate your experience with the following components of the workshop?). Select each of the three statement boxes and revise the three items. You have completed Q2.
5. Create the rest of the questions on your own.

Q3 – Use Rank Order for Q3. Rank-order the topics introduced during the workshop in terms of the relevance to your job (1 being most relevant and 3 being least relevant).

Q4 – Use Multiple Choice for Q4. Would you recommend this workshop to your co-workers?

Q5 – Use Text Entry (the Text Type = Multi Line; Single Line is usually used for a short answer such as name.) for Q5. What would you suggest to improve the quality of this workshop?

The survey page is automatically saved. You can manually save it by pressing Ctrl + S on your keyboard.
Below is what the complete survey will look like. **AGAIN - You used different response scales in this practice for the sake of practice. However, in the actual survey questionnaire that you will use in your evaluation project, you may use the same response scale for most questions, in order to generate consistent data to be analyzed with a rubric.**

- **Q1** The instructor was well prepared for the workshop.
  - Strongly Disagree
  - Disagree
  - Neutral
  - Agree
  - Strongly Agree

- **Q2** How would you rate your experience with the following components of the workshop?
  - Online registration process
  - Quality of the handouts
  - Total length of the workshop

- **Q3** Rank-order the topics introduced during the workshop in terms of the relevance to your job (1 being most relevant and 3 being least relevant):
  - Customer service
  - Team building strategies
  - Phone etiquettes

- **Q4** Would you recommend this workshop to your co-workers?
  - Yes
  - No

- **Q5** What would you suggest to improve the quality of this workshop?
6. If you have added or deleted questions among existing questions, the question numbers might be out of order. To auto-number the questions, pull down the Tools button and select Auto-Number Questions, and then click one of the types (e.g., Sequential Numbering).

7. If you need to create a copy of the survey in a Word file (e.g., to send it to your teammates and instructor for their review), pull down the Tools button and select Export Survey to Word, and then click Export.
3. Collaborate with Others

To develop/administer a survey with other people, you need to give them access to your survey. Note: As a means to submit your survey as a class assignment, give your instructor access to your survey using her email (e.g., ychyung@boisestate.edu).

To do so,

1. Click My Projects, and locate the survey that you want to share with others (e.g., Workshop Survey).

2. Press the down-arrow that appears at the end of the survey line, and select Share Project.

3. Type the collaborator’s email address (insert your instructor’s email address: ychyung@boisestate.edu for your class assignment), and click the Add button.
Compose an email message and click OK.

![Invite ychyung@boisestate.edu to collaborate]

Give the collaborator access to appropriate features by clicking the boxes (e.g., Can edit? Can view results only?).

Before clicking **Save**, you can add additional collaborators by repeating the above steps.

![Share Project: Workshop Survey]
4. Distribute Survey

When you are ready to activate your survey to collect responses, follow the steps below to make the survey available to the survey participants.

1. You have to activate your new survey first. To do so, click My Projects and locate your new survey. It will show New as its status. Press the down-arrow that appears at the end of the survey line and select Activate - it will change the status to Active.

2. To set up the distribution settings, press the down-arrow again and select Distribute Survey.
3. **Under Email, click Compose Email.**

4. **Press the down-arrow of the To: box and click + New Contact List.**

5. You may replace the Name of the contact list with a more meaningful name (e.g., Workshop Survey Participants) instead of the default name with the date/time. Enter respondents’ email addresses and names. Click **Create** when you are done.
6. Enter a sender’s name (your name or someone else’s such as your client’s name that is sponsoring this survey administration), a reply-to email address, and a subject line. Select an option from the **When** dropdown box (e.g., Send Now). Customize the message content.
7. **Important note!** - - If you plan to make it an anonymous survey, you must click **Show Advanced Options**, and select **Anonymous**. Otherwise, by default, your survey will be an identifiable survey. Click **Send Test Email** and enter your email address to send a test email message to yourself and check if the data is stored as an anonymous data.

8. To save the message for future use, click **Save As**, select **My Library: Your Name**, name the message (e.g., Workshop Survey Email), and click **Save Message**.
If you are ready to distribute the survey to your respondents now, click **Send Now**. If not, click **Cancel** – then, when you are ready to distribute it, you can come back to this **Distributions > Emails** screen and click **Compose Email**.

Then, click **Load Message** and find the saved email message and load it up. You will need to set up the settings (To, From, When, and Subject) again.
5. View and Download Results

You can click the Responses tab to view the individual responses, or click the Results tab to view the overall results.

1. To download the data file, you need to open the survey first (e.g., Workshop Survey). Then, under the Responses tab, press the Tools down-arrow button, and select Export Data. Select the file format (e.g., CSV, which you can open with Excel) and download the file.
2. To view a summary of the data for each question, click the **Results** tab. You can change the bar graph to other visual format such as line graph or pie chart.
6. Other Useful Techniques

6-1. An anonymous survey followed by an identifiable survey

In some cases, you want to ask the survey respondents at the end of an anonymous survey, if they would volunteer to participate in a follow-up interview. If you insert text boxes at the end of the anonymous survey to ask for their name and contact information, the survey is no longer an anonymous survey - so you can’t use this method. What you can do is to create another survey that asks for their willingness to participate in a follow-up interview, and then link the first anonymous survey to this second survey. Here is how to do it:

1. After you developed an anonymous survey, create another survey. Let’s say, your first survey was ‘Workshop Survey’ and you named your second survey ‘Volunteer to interview.’

2. Compose the ‘Volunteer to interview’ survey with necessary information (e.g., the reason why you are asking them to participate in a follow-up interview) and questions (e.g., name, email address). Since interviews require providing the interviewees with an informed consent form, you also want to attach the informed consent form document within this second survey. The second survey may look like this:
3. Click/go to My Projects, locate this second survey (Volunteer to interview), and activate it.

4. Open the second survey (Volunteer to interview) again. Click the Distributions tab and click Anonymous Link. Then, copy its URL. Now, you will go to the first survey to set it up to automatically open this second survey (URL) when respondents complete the first survey.

5. Click/go to My Projects, locate and open the first survey (Workshop Survey). Click Survey Options.
7. Select **Redirect to a full URL** and paste the URL of the second survey into the box. Click **Save**.

8. Test the first anonymous survey (e.g., Workshop Survey) to see if you are redirected to the second survey (e.g., Volunteer to Interview) after you submit the first anonymous survey.

This way, the first anonymous survey’s data and the second identifiable survey’s data are separately submitted and collected in two different files. The name/contact info collected from the second survey is not linked to the data collected from the first survey.
6-2. An informed consent form with Add Skip Logic

If you conduct an identifiable survey, it requires you to provide respondents with an informed consent form. If you present the informed consent form to the respondents face to face, you can ask them to sign the form right there. But, if you can't do this face to face, here is what you can do – design your identifiable survey where you ask respondents to open/read an informed consent document and click Yes if they agree to participate in the survey. This Yes information is stored in the data file, which you can use as an alternative to their signature.

Here is an example of how to do so:

1. Create Q1 as a Text/Graphic type question, and present your directions in Q1. Click the Rich Content Editor tab and click the Insert File icon to insert the informed consent form.

2. Create Q2 as a Multiple Choice type. Compose the question as shown below. Set the number of choices to 2 for Yes and No.
3. On Q2, click **Add Skip Logic** and add logic as shown in the following screen shot, so that if respondents clicked No, they will skip all questions and go to the end of the survey. If they clicked Yes, they will proceed with the remaining questions.

Obviously, this is an identifiable survey - so don't forget to add a question asking their name somewhere in the survey as well.

Add a **page break** at the end of these questions, so this information appears on a separate (usually first) screen/page.
6-3. Exclude From Analysis

Use this method:

- if you are using ‘Not applicable’ as one of the options in your survey questions (e.g., SD, D, N, A, SA, NA),
- if you are calculating the average score of the responses, and
- if you are using Qualtrics’ automatic report (which shows the average scores).

In this case, you need to set up the survey so that the data obtained from the ‘Not applicable’ option will be excluded from analysis. To do so,

1. Go to the survey question that has ‘Not applicable.’
2. Right-click on ‘Not applicable’ to show the pull-down menu.
3. Select Exclude From Analysis.
6-4. Allow Text Entry

Use this method, if you want to add a textbox next to a response option (such as the "Other. Please specify:" checkbox, or an option button that you want to add a text box to get the respondent’s explanations for selecting the option).

Right-click on the response option, and select **Allow Text Entry** to show a textbox next to it.
6-5. **Recode Values**

Use this method:
- if you are using closed questions with response scales (any type),
- if you are calculating the average score of the responses, and
- if you are using Qualtrics’ automatic report (which shows the average scores).

Please make sure that the appropriate values are assigned to the options used in the response scales. For examples, when using a Likert scale, you probably want to assign 1, 2, 3, 4, and 5 to SD, D, N, A, and SA, respectively. That is, the higher, the better.

Qualtrics automatically assigns the values to the options, but if you modified the scale a little bit, the value points could be messed up.

To double-check it, right-click on the response scale, and select **Recode Values**...

![Recode Values](image)

Then, make sure that the recode values are appropriately assigned, and if not, change them.

**Recode Values**

<table>
<thead>
<tr>
<th></th>
<th>Recode Values</th>
<th>Variable Naming</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Strongly Disagree</td>
<td>Strongly Disagree</td>
</tr>
<tr>
<td>2</td>
<td>Disagree</td>
<td>Disagree</td>
</tr>
<tr>
<td>3</td>
<td>Neutral</td>
<td>Neutral</td>
</tr>
<tr>
<td>4</td>
<td>Agree</td>
<td>Agree</td>
</tr>
<tr>
<td>5</td>
<td>Strongly Agree</td>
<td>Strongly Agree</td>
</tr>
<tr>
<td>0</td>
<td>Not Applicable</td>
<td>Not Applicable</td>
</tr>
</tbody>
</table>
6-6. Delete testing responses

Often, you want to submit your survey instrument several times to test it out, before you administer it with the actual respondents. If you did so, you have those several test responses in the Qualtrics system, which shouldn't be included in your actual analysis. So, you want to delete them.

If you will export the data file to an Excel file and analyze the data using Excel, you don't have to delete the test responses in Qualtrics because you can delete them within the Excel file later (you just have to remember how many of them on the top are the test responses that need to be deleted). But, if you plan on using Qualtrics built-in report system, you want to delete test responses now.

To delete them,

- Select/open your survey on the screen.
- Click the Responses tab.
- Recognize the test response. Press the down-arrow under the Actions column of the test response, and select Delete Response.

- On the popup window, checkmark “I am sure I want to this response.” And click Delete this response.

Delete Responses

Cancel  Delete this response