Using Qualtrics for Surveys

Course Objectives

- Navigate the Qualtrics interface
- Create a survey in Qualtrics, using different types of questions and validation
- Organise questions and structure a survey using page breaks, blocks and logic (display and skip)
- Distribute a survey using an anonymous link
- View, edit and download survey data

Student & Staff Training and Support Information

email: training@library.uq.edu.au
web: https://web.library.uq.edu.au/library-services/training
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1 About Qualtrics
Qualtrics XM is an online survey platform, compatible with Google Chrome, Mozilla Firefox, Microsoft Edge (Chromium version) and Apple Safari. Surveys generated with this tool can be completed using a computers, tablets and mobiles with internet connection. There is also an application (Qualtrics Offline Surveys) that allows the administration of surveys offline.

2 Access
UQ staff and students have access to Qualtrics. To log in, open your browser and perform a search using the keywords “UQ” and “Qualtrics”. This webpage contains access and support information. Most people can access their account using the link: https://uniofqueensland.au1.qualtrics.com/ and sign in using the UQ username and password on the UQ Authenticate page.

There are also school-specific accounts access for the:
- School of Psychology: https://research.psy.uq.edu.au/
- School of Business: http://uqbel.qualtrics.com/

3 Interface
The home page presents link to the training resources on the top, a list of your recent projects and a button for creating a new project on the left, a snapshot of the current participation on active surveys and workflows summary in the core area.
The top navigation bar includes a XM button hyperlinked to the home page, a hamburger menu that lists the different pages in Qualtrics (Home, Projects, Catalog, Workflows, Directories and Library), a help icon, notifications and profile, where the account settings can be accessed and the session can be closed through logging out.

The Project page lists the projects you created and the projects shared with you, with information about their status, number of responses, creation and most recent modification dates, and a menu associated to each project.

The project menu can be displayed when clicking on the 3 dots on the right side of the row. It offers the options to activate, share, copy, move, edit, preview, distribute, view data, analysis, view reports and delete each project. Projects can be organised in folders using the panel on the left to create folders and dragging and dropping projects as desired.
The Catalog page opens anytime a new survey is created. It lists numerous templates and projects. For instance there are generic templates for specific tasks such as Product Naming, Brand Perceptions, Customer Satisfaction, etc.

The Workflows page is used for the creation and management of workflows.

The Directories page lists the contacts added to the UQ Qualtrics account, directory settings, marketing tools and a distributions tab.

The Library lists on the left 2 main directories: the Qualtrics library, with numerous resources that can be used for your surveys, and your library, listing any files, graphics, messages and survey components you saved to have available for re-use without the need to copy.
4 Creating a Survey Project
We can create a new survey from the Home or Projects pages, clicking on Create Project. This will redirect us to the Catalog page, where we could choose a template or to create a project from scratch.

Exercise 1: Creating a survey

1) Click on “Survey”, and then click “Get Started” on the lower right corner.

2) Give your survey a meaningful name (e.g. “Training Survey Example”), choose the folder where you would like it stored and choose the option “Create a blank survey project”. Then click “Create project”.
4.1 Project Interface overview
The project interface has 6 tabs: Survey, Workflows, Distributions, Data & Analysis, Results and Reports. The appearance, options and content on each tab varies depending on the status of the survey, participation, settings, features used, etc. On the far left of the survey section there are four icons: survey builder, survey flow, look and feel, survey options and translations.

On the top banner, to the right of the survey name, there is a small arrow. This arrow allows us to easily swap from one survey to another.

4.2 Survey Builder
The survey builder consists of the main area, where different types of questions can be added and organised in blocks, and an item editing panel on the left. On the top there are buttons for previewing and publishing the survey.
4.3 Questions
By default, when we start building a blank survey in Qualtrics, we get one multiple choice question within a Default Question Block and an end of survey block. More questions can be added using the “Add new Question button on the bottom of a block, or using the “+” symbols that display on the left side of each question when hovering over any question.

There are numerous types of questions that can be added to the survey. The most used ones are:

- Text/Graphic: Used to include information for the participant, and images. Commonly used at the start of the survey to welcome and get informed consent. Not really a question
- Text entry: used for open text questions (e.g. comments/thoughts) or entering information (e.g. email, mobile, age)
- Multiple choice: participants are instructed to select one or more options. Question choices can be quickly created using the suggested choices, which includes balanced scales. The options can be easily edited using the “Edit multiple” view.
- May include a “Other” option with text entry
- Matrix table and side by side: grouped multiple choice questions, normally used with a series of statements and a Likert scale, or yes or no choices, correspondingly.
- Ranking: the respondents are asked to rank a list of items, or a sub-set of a list of items
- Slider: Provides a continuous scale with an interactive bar and slider, that respondents can use to indicate percentage, or position between two points
- Captcha verification
- File upload (e.g. pdf, document, image, spreadsheet)
When writing a question, the “Rich content editor” option becomes available. This allows inserting hyperlinks, graphics, downloadable files and media.

Exercise 2: Adding and editing questions

1) Open the “Restaurant Survey Example” exercise file
2) Add the questions to the survey created in Exercise 1. We recommend:
   a. a text/graphic type for the introduction
   b. a multiple choice for questions 2, 3, 4, 5, 6 and 8
   c. a matrix type for question 7
   d. an open-ended type for question 9
3) Regarding editing and customisation of questions, we recommend:
   a. Allowing multiple answers for questions 2, 3, 4, 5 and 6, and allow one answer for question 8
   b. Adding text entry box for the “other” options
c. Displaying options vertically for questions 2, 3, 4, 5 and 6 and horizontally for question 8

![Image of Qualtrics interface showing question type options]

d. Choosing a “paragraph style box” for question 9

![Image of Qualtrics interface showing text entry options]

e. Use “suggested choices” for questions 7 & 8

![Image of Qualtrics interface showing suggested choice options]

5 Flow and Aesthetics

5.1 Organise & structure

Survey structure varies depending on the purpose, target participants, and other factors. Surveys commonly include: an introduction, demographic questions, main survey questions, open-ended questions and end of survey.

The introduction welcomes participants, indicates the purpose of the survey, indicates the time for completion of the survey, eligibility to participate, confidentiality, ethics information and ethics clearance number, information about incentives, anonymity, voluntary participation and may request participant’s commitment to provide the best answers.
The demographic questions may include age, gender, location, cultural background, income, education, occupation, association and others. It is advisable to collect only the information that is likely relevant to the study.

The main survey questions are the most important questions in the survey and the core of the study. It is important to only include necessary questions, to keep the wording simple and easy to understand, presented in a neutral way (non-biasing nor leading), ask only one question at the time (avoid double-barrelled questions), use appropriate types and are technically easy to answer and present response options that are easy to interpret and encompass the possible answers. It is generally advisable to only present relevant questions and avoid forcing answers.

Open-ended questions are often used to explore, provide an in-depth understanding about an answer provided in a previous closed-ended question (e.g. please describe why did you answer “low service quality”), provide room for participants to communicate their thoughts and opinions, and learn about their survey experience.

The end of survey thanks respondents for their time and participation in the survey, may include a summary of answers, and it is occasionally linked to some mechanism for the collection of information for rewarding participation in the survey.

Qualtrics counts with numerous tools for structuring and organising the survey. Some of these tools are blocks, logic (display and skip) and pipped text.

5.1.1 Blocks
Blocks can be very useful for organising your survey. They can be added through clicking on “Add Block” and all the questions within a block can be hidden through clicking on either of the small arrows that display on the left margin of each block. Questions can be reorganised through dragging and dropping. Every block starts on a new page, and it is also possible to add “page breaks” between the survey questions within a block.
After re-arranging your questions, it may be desirable to correct the numbering. To do this click on the “Tools” button, located on the top left, choose Auto-number questions, and choose your preferred option (e.g. sequential).

Exercise 3: Using blocks and pagebreaks

1) Rename the “Default Question Block” as “Introduction and Consent”
2) Add a block, name it “Menu items”
3) Move questions 3, 4, 5, 6 and 8 to the “Menu items” block
4) Add page breaks between the questions within this block
5) Add another block and name it “Experience”
6) Move the matrix and open-ended questions to the “Experience” block
7) Add page breaks between the questions within this block
5.1.2 Randomisation
Questions within a block and answer choices can be randomised. Randomisation of questions lowers the risk of previous questions influencing the answers provided by participants in other questions. Choice randomisation reduces the risk of anchoring/primacy bias, which is the tendency that participants may have to choose the first reasonable answer. It is important to apply this feature with caution, because logical flow and order are important aspects for respondents’ engagement.

Exercise 4: Randomisation
1) Click on one of the statements of the matrix question
2) On the Edit question panel, choose the option “Statement randomisation”
5.1.3 Skip logic & display logic
Some questions or group of questions in your study may be applicable only to a sub-set of the participants. In these cases, using skip logic to skip irrelevant sections, and display logic to show participants the questions and answer choices that are relevant to them.

Exercise 5: Skip logic
In the restaurant project example, we would like to direct all non-eligible participants to the end of the survey. This can be done with skip logic.

1) Click on Question 1
2) On the “Edit question” panel, under “Question behaviour”, click on “Skip logic”

3) Indicate that after the participant answers this question, the questionnaire will skip to the end of survey, if the selected count is less than 3. This means that only 2 or less of the eligibility criteria were submitted as responses.
Exercise 6: Display logic

In the restaurant project example, the questions about types of pizza and types of tacos are only relevant to respondents who selected “pizza” and/or “tacos” in Question 2. It is possible to display the questions when relevant, using display logic:

1) Click on the “types of pizza” question
2) On the “Edit question” panel, under “Question behaviour”, click on “Display logic”

3) Use the drop down menus to create the statement below and click save

4) Repeat the steps above for the “types of tacos” question

Note: for display logic to work appropriately, it is important that the condition and the question to display are in different pages.
5.1.4 Pipped text

Pipped text can be used in various ways in Qualtrics. For instance, it may be used to customise subsequent questions based on previous responses.

Exercise 7: Pipped text

In the restaurant scenario, we could use the respondent’s choices from the mains (e.g. pizza, tacos) and the dessert (tres leches, tiramisu, panna cotta) questions to customise the “How likely would you be to purchase a combo” question

1) Click on the combo question statement and type the words “that includes”. Then click on “Pipped text”

2) Select the option survey question, then choose the main’s question and the option “selected choices”

3) Repeat the previous step, but selecting the dessert question. The question can be finalised adding the wording “and a soft drink”
5.2 Aesthetics
The survey format can be customised through choosing global formatting options under “Look and Feel” (e.g. themes, layout, style, background) that apply to all the survey, or through customising local formatting using the rich content editor for each question.

The local changes (i.e. done through the rich content editor) override the global changes. To restore the global formatting, click on “Look and feel” and select “Restore Default”. To remove local formatting from a specific question, open the rich content editor and select “remove formatting”. To remove the local formatting from a group of questions: select them using the checkbox, then click on Tools, Review, Strip formatting.

Exercise 8: Aesthetics
A) Theme
The default survey theme for the UQ account in Qualtrics has the brand colours and logo. To change the theme:
1) Click on the “Look and feel” button and choose “Theme”
2) Experiment with different themes.
3) Choose the “Blank” theme
4) Click “Apply”

B) Layout
1) Click on the “Look and feel” button and choose “Layout”
2) Experiment with different layouts. Note that not all layouts are compatible with all settings and survey options.
3) Choose the “Flat” Layout
4) Click “Apply”
C) Style
1) Click on the “Look and feel” button and choose “Style”
2) Experiment with different colours, type of fonts, question font size, answer text size, question spacing and contrast against foreground
3) Swap between the desktop and mobile views to evaluate your choices
4) Click “Apply”
D) Logo

1) Click on the “Look and feel” button and choose “Logo”

2) Click on “Change”, then select your library, and click on “Upload a New Graphic”

3) Click on “Choose file”, navigate to the exercise files folder, and choose the “Logo Example” file

4) Click “Save”

5) Experiment with the placement, height and mobile scaling.

6) Check the desktop and mobile views

7) Click “Apply”
E) Background

1) Click on the “Look and feel” button and choose “Background”
2) Click on Background type and choose “Photo”
3) In the Background Image field click “Change”, and choose the Logo Example
4) Check the desktop and mobile views
5) Click “Apply”

Note: you might prefer to remove the logo or the background, choosing the one that looks the best according to the devices and distribution method.

5.3 Survey navigation

The design and motion options can be adjusted to optimise the experience of participants when navigating the survey. Some settings that can be adjusted include:

- Response requirements (e.g. force response and reminders)
- Back button
- Progress bar
- Auto-advance questions
- Present one question per page, or only related questions per page
- Choose vertical scrolling over horizontal scrolling
Exercise 9: Response Requirements

In the restaurant survey example, the eligibility and consent is an important question that participants should respond before progressing to the survey. On the other hand, participants may be allowed to skip questions but we can display a reminder message requesting a response. This can be done through adding response requirements.

A. Force Response
   1) Click on the eligibility and consent question
   2) On the Edit question panel, under Response requirements, click on the “Add requirements” toggle
   3) Choose the “Force response” option

B. Request response
   1) Select all the questions in the “Menu Items” and the “Customer Experience” blocks through clicking on the upper left corner of each question
   2) On the Edit questions panel, under Response requirements, click on the Add requirements toggle
   3) Choose the “Request response” option
Exercise 10: Navigation settings

1) To add a Back button, click on the “Survey options” icon in the left side, click on “Responses” and then click on the Back button toggle.

2) To add a progress bar, click on the “Look and Feel” icon on the left side, click on “General” and choose from the drop-down menus which type of progress bar you would like for your survey and the position, and click “Apply”. For UQ surveys using the UQ theme, it may be preferable to display the survey bar on the bottom.

3) The Autoadvance feature moves respondents to the next question without the need to click on the “Next” button. To activate this feature, click on the “Look and feel” icon, then Click on Motion, tick the “Autoadvance questions” checkbox and click “Apply.”
Exercise 11: ExpertReview

The ExpertReview functionality is a digital tool that reviews surveys in Qualtrics. Among other things, it checks and flags questions that could be modified for increasing accessibility and to make it easier to navigate on mobile devices.

1) Activate the ExpertReview functionality through clicking on the “Survey Options” icon, then “general” and clicking on the Expert review toggle.

2) In the Survey builder you may now notice a ExpertReview score on the top right corner. Questions that may need revision are flagged with a lightbulb icon on the top right corner. Click on the ExpertReview score button.
3) Have a look of the ExpertReview report and notice all the aspects of the survey that have been checked. It provides details of which questions could be modified to improve the experience for mobile users and make the survey more accessible.

4) Close the report, click on question 7, and change the alignment of the choices to vertical

5) Check the ExpertReview report again

6 Trials and Distribution

6.1 Trials
Evaluating your survey through previewing and trialling is of crucial for the success of a study. There are various approaches that can be used, including previewing, individual testing, review (expert and non-expert, through written feedback, interviews or focus groups), generating automated responses and piloting. Piloting can be particularly helpful for evaluating the answer options presented in multiple choice questions, and for evaluating the overall survey experience through adding an open-ended question at the end of the survey.
In Qualtrics it is possible to preview questions and the entire survey, with the appearance it would have for respondents. This feature can be accessed from the Survey Builder, through clicking on the “Preview” button located on the top right. This will open a new window with the survey preview for computer screens and mobile devices. You can turn on or off the mobile phone view through clicking on the phone icon on the top of the screen. Previewing your survey, testing all possible paths and making all necessary adjustments is advisable to make sure there are no issues. The answers submitted through the survey previews are not recorded in the system.

There is a feature for test responses generation, which can be helpful for viewing the data and practice analysis before proceeding to survey distribution.

Exercise 12: Preview survey

1) Click on the Preview button

2) Try the survey for the desktop and the mobile views

3) Note how the matrix question type displays on the desktop view vs mobile view. This may shed some light on the ExpertReview report and why was this question flagged for revision.
Exercise 13: Generate test responses

In this activity we will generate test responses that can be used to view how answers are recorded, download data, practice analysis, etc.

1) In the survey builder, click on tools and choose “Generate test responses”

2) Choose the number of responses you would like to generate. For instance, you could type 50

3) After the test responses are generated click “Done”
6.2 Publish and Distribute
There are various survey distribution methods and associated settings. In this section we will cover specifically distribution through anonymous link.

Before distributing the survey, it is important to revise the settings. To do this, you can click on the “Survey Options” icon in the left side of the Survey section. In the General section you can adjust the display name and survey description.

In the Responses tab, turn off the toggle to “allow respondents to finish later”. This cookie-based feature has been reported to cause issues and can be difficult to de-bug.
Under the Security tab, you can set-up the survey access to be “available to anyone”, turn-on the toggles for: Bot detection, prevent indexing and anonymise responses, and set the uploaded files access to “only users with permission to view responses”.

When the survey is ready, you can publish it through clicking on the publish button. This action saves the changes/edits and makes the latest version available for respondents. There is more information about publishing and version control available in the Qualtrics Support website.
Under the distributions tab there are various mechanisms that can be used. The preferred ones are single anonymous link and QR code.

There is also an application (Qualtrics Offline Surveys) that allows the administration of surveys offline.

Note: In the distribution section is possible to create personal links and perform email distributions based on contact lists. This feature is not broadly enabled/available, but can be requested to the UQ licensing team, and can be used when the appropriate ethics clearance is approved.

Note: Lists can be created under the Directories page, in the Segments and Lists tab, clicking on “Create a list”. Then provide a meaningful name to the list, and either input manually or choose “Upload a file”. If you choose to upload a file, make sure that it is in csv format, and that it includes: FirstName, LastName and Email. There is the option to download a sample that can be edited to populate with the contacts information. Once your study concludes, it is also advisable to delete all the contacts data to avoid having user-identifiable data in Qualtrics.
Exercise 13: Anonymous survey link and QR code

A) Anonymous Survey Link:

1) Customise the survey options as described in pages 27 and 28
2) From the Survey Builder, click on the top right corner “Publish” button to update all the changes you have made so far

3) When publishing, it is possible to directly copy the link for distribution. This link is also available in the distributions tab. Copy this link.

4) Copy this link, paste it in a new browser window and test your survey. Differently from the “Preview” mode, the answers that you submit through this mechanism will be recorded in the system.
B) QR code

From the distribution section it is possible to download a QR code which is very useful for surveys predominantly accessed using a mobile.

1) Click on the Distributions tab, then click on QR Code and then “Download QR Code”

2) You can scan the downloaded file with your mobile and test it on your mobile.

7 Data

The distribution summary section displays how the participation rates vary in time.
In the data and analysis section we can view the responses displayed in a table format. It is possible to customise columns, filter information, create filters, edit, delete and download data.

To choose which variables to display, click on the “Column chooser” in the top right corner of the table. For instance, you could choose survey metadata and display the “Duration (in seconds)”. The outliers could be identified, carefully revised and decide if they need to be removed from the study.

To create and apply a filter, click on the filter button on the top left corner of the table, select “Create New Filter”, give it a meaningful name and use the logical operators to create the filter conditions.

Editing can be a useful feature, for instance for removing profanity from the open-ended questions. This can be done through clicking on the answer cell to edit, make the changes and then click the “Review and Publish” button in the lower right corner of the table.
Edited cells display a grey triangle in the upper left corner and can be reverted to the original at any point.

The data can be exported through clicking on the Export/Import data button on the top of the table, and choosing the Export Data option.

Although there are multiple formats, the CSV is considered the more robust and the SPSS format has been reported to cause issues. There is the choice to download the response text or the numeric values. Revising carefully the latter is advised because occasionally numbers in the export file are different from the ones observed in the Qualtrics platform.

The majority of users prefer to perform their analysis outside of Qualtrics, nevertheless it is worth mentioning that there are analysis tools available on the platform, such as TextiQ for analysis of open-ended questions, Crosstabs for the creation of matrix summary tables similar
to pivot tables y Excel, and Weighting for the reporting of marks, useful for quiz type surveys and scoring responses.

The Reports tab presents automatically generated visualisations for each question, and can be used to generate standard and customised reports.

Exercise 14: Filtering

1) Click on the Data & Analysis tab
2) Click on “Add filter” and choose the option “Create a new filter”

3) Create a filter called “Consent” and display exclusively the responses for participants that meet the 3 criteria. Replicate the criteria listed in the image below. To add new rows click on the tree dots at the end of each statement and choose “Add”.

4) Click apply and save filter
Exercise 15: Downloading Data

1) Click on the “Data & Analysis” tab
2) The data can be exported through clicking on the Export/Import data button on the top of the table, and choosing the Export Data option.

3) Choose the CSV option, download all fields, and tick the option “Use choice text”

4) Click download
5) In your computer, search, open and view the downloaded file
8 Training Modules and Information
Qualtrics has guides and training modules available in their support website: [https://www.qualtrics.com/support/](https://www.qualtrics.com/support/)

If you are prompted to log-in to access the training modules, use the log-in with SSO, type “uniofqueensland“ and then log-in using your UQ credentials.