

# University Planning and Analysis

## Reference Guide for Using Qualtrics

Using information gathered from the Qualtrics website as well as conversations with Qualtrics support, UPA has created this handout for tips on some common areas users tend to have questions about when getting started with Qualtrics. This reference guide is not intended to be a complete guide to Qualtrics, but should be used as a supplement with Qualtrics University training resources. For a complete collection of training resources, visit Qualtrics University at <http://www.qualtrics.com/university/researchsuite/>

### Edit Survey Tips

#### Question Types

- To add text in your survey, such as at the beginning of a survey or block of questions, choose the question type Text/Graphic, which will create text but no answer choices.
- For Matrix questions that have many statements, consider using the repeat headers feature. This will enable users to continue to see the scale points as they scroll down to answer each statement. In the light blue area to the right, under Options check 'Repeat Headers'.
- For Text Entry question types, the difference between Single Line, Multi Line, and Essay Text Box is for visual purposes only. There is no character limit, but you can set one if you need to.

#### Printing and Viewing Survey

- To view your survey as others will see it, click 'Preview Survey'. Alternatively, click 'Print Survey' and print it to a PDF.
- To view your survey with your coding and/or formatting included, go to Edit Survey -> Advanced Options -> Export Survey to Word.

#### Question Numbering

- To re-number your survey questions in order, go to Edit Survey -> Advanced Options -> Auto-Number Questions.
- To display question numbers in your survey, go to Edit Survey -> Survey Options and check 'Show Export Tags'.

#### Page Breaks

- Unless you add a Page Break, pages will automatically break at the end of blocks.
- To add a Page Break, in Edit Survey, click in the question you want the page break to appear after and to the right of the page in the light blue area, click 'Add Page Break'.

#### Using Code to Customize Survey

- If you need to customize your survey in a way that you don't see a point-and-click option, you can use HTML, JavaScript, and CSS code to get your desired results. To learn how to place custom coding into your Qualtrics survey go to <http://www.qualtrics.com/university/researchsuite/developer-tools/custom-programming/example-code-snippets/>

### **Adding a Progress Bar and Back Button**

- To add a Progress Bar go to Edit Survey -> Look and Feel -> General and choose from the drop-down list which type of Progress Bar you want to display.
- To add a Back Button, go to Edit Survey -> Survey Options -> Back Button. The Back button will allow respondents to move backwards within the current block. It allows going back across blocks, unless there is an element between the two blocks in the Survey Flow (like a branch, randomizer, or other similar non-question-block element).

### **Saving Edits**

- Qualtrics automatically saves edits as you work, but you can manually save work by typing CTRL + S.

## ***Distribution Methods***

There are two URL options for distributing a survey in Qualtrics: Email Survey and Survey Link.

### ***Email Survey (Qualtrics Mailer)***

The distribution method that offers the most features and flexibility is the Qualtrics Mailer. To use Qualtrics Mailer you create and upload a 'Panel' in .csv format that includes email addresses for all the recipients as well as any other data you want associated with each person (e.g., name, address, etc.). You then use the Qualtrics Mailer to send emails to your panel. In these emails, each recipient will get a **unique** link to access the survey. Using the Qualtrics Mailer, you can control access to the survey, track respondents, associate respondents with panel data, customize invitations, track mailing history, and send reminder/thank you emails.

### ***Survey Link (Open-Access)***

The alternative option of distribution is to use the Survey Link. When you activate your survey, Qualtrics generates a survey URL. The survey link can be copied and pasted into emails, letters, websites, and so on. Everyone uses the same link to access the survey. Qualtrics uses this same survey link if you use the other distribution options: **Social Media, In-Page Popup, Website Feedback, and Survey Director**. With **Social Media**, you can post the Qualtrics link on various sites such as Twitter, Facebook, LinkedIn, etc. **In-Page Popup** creates a popup on your website. (Note: It is not technically a pop-up but rather a part of the website, and will not get blocked by popup blockers.). **Website Feedback** is an icon that is placed on the website that directs people to your survey. **Survey Director** is a tool you can customize to direct people to your survey or your reports. The Survey Link can be used with or without an authenticator depending on the level of features you want.

### ***Using the Survey Link without an Authenticator***

The survey link without an authenticator can be an easy and basic way to distribute an open-access survey. This is the preferred method if you do not have a defined population or email addresses. You will not be able to track respondents or control access, but can easily copy the link to handouts or flyers for wider distribution.

### ***Using the Survey Link with an Authenticator***

If you do not want to generate unique links (e.g., because you do not have email addresses for your population), but still want to control access to your survey, you can use the Survey Link with an Authenticator. You will need to assign respondents a password that they will use to access your survey. When you add an Authenticator element in your Survey Flow, you will reference a panel that you have created. Every panel requires an Email field so when you don't have email addresses, you can create a column with dummy emails. Next, you will add a field with ID's and/or passwords for each respondent.

Then, when a respondent clicks your survey link, they will be asked to login and verify their identity before gaining access to the survey.

**To learn about using panels click here:**

<http://www.qualtrics.com/university/researchsuite/distributing/panels/>

**To learn about adding an Authenticator click here:**

<http://www.qualtrics.com/university/researchsuite/advanced-building/survey-flow/authenticator/>

## Using Survey Flow

### Introduction

Survey Flow is an important feature of Qualtrics that everyone creating a survey should learn to use. To get started go to Edit Survey -> Survey Flow. In the Survey Flow screen, you will see your survey separated into blocks. If you have not added any additional blocks to your survey, Survey Flow will only have your default first block. A block is simply a group of questions in your survey. Within Survey Flow, if you click 'Add a New Element Here', you will see nine choices: Block, Branch, Embedded Data, Randomizer, Web Service, Authenticator, End of Survey, Table of Contents, and Conjoint. The following paragraphs will briefly describe each of these elements of Survey Flow and how they are commonly used. Remember that the elements described below refer to entire blocks of your survey. There are similar options that can be used for individual questions and these are found outside of Survey Flow in the Edit Survey screen. Also, keep in mind that every survey is unique and people are always finding new ways to use Survey Flow. Therefore this guide doesn't include every possible method for using the Survey Flow. For tutorials on Survey Flow, go to the following link: <http://www.qualtrics.com/university/researchsuite/advanced-building/survey-flow/>

### Block

The Block element in Survey Flow is used when you want to repeat an existing block somewhere in your Survey Flow. If your respondents are filtered through your survey and you want some of them to answer the same block, add a new block element. Be sure to only repeat a block in mutually exclusive branches so that respondents don't get the same questions twice. On the other hand, if you do want respondents to get the same block twice in one survey (e.g., so they can review or make changes to previous answers) keep in mind that only the most recent answers will be saved to the results section.

### Branch

The Branch element allows you to route respondents to different blocks using conditional logic. The Branch element is similar to Skip/Display logic, only Skip/Display is used for individual questions whereas the Branch element is used for blocks. In the Branch element you choose from a drop down list whether you want to branch based on a 'Question', 'Embedded Data', 'Device Type', 'Quota', or 'GeoIP Location'.

### Embedded Data

Embedded Data is any extra information you would like recorded in addition to the question responses. For example, if you have extra fields in your panel (in addition to email and name), the embedded data element can be added so that these fields are appended to your survey results. The value for your Embedded Data field can be pulled from data that you have uploaded into a Panel, information appended to the participant's survey link, or, it can be a fixed value set in the Survey Flow. Embedded data can be used in several ways within Qualtrics such as for advanced logic, piped text, criteria for creating sample panels, or for filtering data in the 'Results' tab.

## **Randomizer**

The Randomizer element allows you to randomly present different blocks or elements within your survey to respondents. You can move the blocks beneath the Randomizer element and choose to either present all of the elements in random order or randomly present a subset of the blocks. If you choose to present a subset, you may want to check the 'Evenly Present Elements' box to make sure that each block is seen approximately the same number of times. The Randomizer element is useful for experimental design surveys where you want to randomly assign respondents to experiments or a control group. Keep in mind, that there is also a randomization option outside of Survey Flow in Edit Survey that can be used for individual questions.

## **Web Service**

The Web Service element allows you to pull information from an external websites' RSS feed and use it as embedded data. RSS (Really Simple Syndication) is a website with frequently changing or updated content. After creating the Web Service element, you can then pipe this embedded data into your survey questions or answer choices. For example, you can copy the RSS feed link for iTunes Top Ten Songs into your Survey Flow. You can then create a question in your survey (e.g., Rank these 10 songs from most favorite to least favorite) and pipe the song names into the answer choices.

## **Authenticator**

The Authenticator element is used to verify respondents' information by prompting them to 'log in' before getting access to the survey. Authenticator is useful for when you don't have email addresses or want to use the single Survey Link but still want to control access to the survey. You will need to provide respondents with a login id that you create. You can change the options for the Authenticator, such as the number of allowed log in attempts, the error message displayed, and the ability to save and continue. You have the option to authenticate only certain blocks of the survey or the entire survey. If you authenticate the entire survey (require log in to access the survey), be sure to move the Authenticator element to the top of the Survey Flow and move all other blocks underneath and within the Authenticator. For the authenticator to work correctly, all authenticated blocks should be indented to the right underneath Authenticator element. Otherwise, even if a respondent fails authentication, they will still be able to click next to the rest of the survey.

## **End of Survey**

The End of Survey element skips respondents to the end of the survey early. The End of Survey element is often used with other survey flow elements. For example, suppose you want 100 students from each class to complete your survey and you already have responses from 100 sophomores. Once the quote is met, you can skip all sophomore respondents to the end of the survey. In the End of Survey element, click 'Customize' for additional options.

## **Table of Contents**

The Table of Contents element allows you to create a list of sections of your survey. The Table of Contents can be placed at the beginning of your survey so that respondents can select which block they want to respond and go directly to that section of the survey.

## **Conjoint**

Conjoint Analysis is a technique used to assess the relative importance individuals place on different features of a given product. A conjoint study usually involves showing respondents a set of features and asking them to indicate how much they like or prefer the different attributes of that feature. Use Survey Flow to add the conjoint element to the correct position in your survey.

## ***Handling Partially Completed Surveys***

Often a respondent may respond to part of a survey and exit in the middle of it, with or without the intention of returning at a later time to complete it. Alternatively, sometimes when a respondent receives a request to take a survey, they may open the survey and preview it before coming back at a later time to finish it. There are a couple of things to keep in mind about handling partially completed surveys in Qualtrics.

### **Things to Know...**

- It's a good idea to let the respondents know ahead of time (e.g., in an email or introduction) how long the survey is expected to take to complete. Also, consider adding a Progress Bar to your survey. Keep in mind though that the progress bar can be misleading if you have skips and branching elements in your survey.
- If you distribute your survey with the Qualtrics Mailer, as long as a respondent doesn't click the final arrow at the end of the survey, they can exit the survey and at any time before the expiration date, return to the page where they left off on. Respondents are allowed to return regardless of whether the Save and Continue options is clicked in Options. On the other hand, if you distribute the survey using the Survey Link, you will need to go to Survey Options and check the Save and Continue box to allow users to return to the survey where they left off. This will put a cookie on their browser so that computer will remember where they left off. Keep in mind that when using the Survey Link, if the respondent uses a different browser or device to access the survey, they will have to start from the beginning.
- When a respondent answers some but not all of a survey, Qualtrics stores them temporarily in a 'partially completed' holding area. If they return and complete the survey, their response will be recorded as complete. When using the Qualtrics Mailer, if someone answers part of a survey but doesn't return after some set time (by default, **one week**), their link will expire and their partial responses will be recorded as complete. Also, when you officially close the survey, all partially completed responses are recorded as complete.

### **Adding a 'Submit' button**

There is no point-and-click method for adding a 'Submit' button to the end of your survey. By default, the final button is just a forward arrow. So unless you add text stating that this is the end of the survey, the respondent will just click the last forward arrow and then see that they have completed the survey. This could create a problem if they wanted to go back and change and answer or were simply previewing the survey before planning to return at a later time to complete it. Depending on your Survey Options settings, they may not be able to return and retake the survey. We suggest you add a final question at the end of the survey to remind respondents that the survey is complete (e.g., 'Click next to submit your answers'). To change the next arrow to a 'Submit' button, visit <http://www.qualtrics.com/university/researchsuite/developer-tools/custom-programming/example-code-snippets/>. Scroll down the page to Custom 'Submit' Button.

For more information on partially completed surveys go to <http://www.qualtrics.com/university/researchsuite/basic-building/basic-survey-options/partial-completion/>

## ***Troubleshooting Survey Access Problems***

The following are possible messages that recipients may see when trying to access your survey. If a respondent gets one of these messages and has not completed your survey, follow these solutions to troubleshoot the problem.

**Message:** Thank you for taking the survey. Your response has been recorded.

**Solution:**

- This message is displayed when the survey link has already been used. To send respondents a new survey link, go to View Results-> Respondents. Under Actions, click the drop box and select 'Retake Survey' or 'Retake Survey as New Response'. A survey link will be generated that can be used to retake the survey.

**Message:** Page cannot be displayed.

**Solution:**

- Some email accounts are set up to automatically disable links. When users click on the link, they may see a message such as 'page cannot be displayed.' If this is the case, manually copying and pasting the survey URL into the address bar will give them access.
- In rare situations, the user's firewall could be blocking the Qualtrics website. If this is the case, the quickest solution would be to try taking the survey from a different location.

**Message:** Your survey session has expired and your response if any has been recorded.

**Solution:**

- It's possible the respondent clicked your survey link when you first sent it out and then returned after a week to finish it, but their session was closed out due to inactivity. Once someone clicks the survey link, by default the survey session expires after one week of inactivity. If this occurs, you can send the respondent a new link by going to View Results-> Respondents. Under Actions, click the drop box and select 'Retake Survey' or 'Retake Survey as New Response'. Also, in Edit Survey -> Survey Options you can change the default expiration for survey links so that respondents have more time to return to complete a survey.
- It's also possible that the survey link expired even if the respondent never clicked on it. Using the Qualtrics Mailer, by default respondents have 60 days to click the survey link before it expires. In Advanced Options, you can change this but can only go as high as 90 days. If a respondent wants to complete the survey after 90 days, you will need to send them a new link.
- Finally, it's possible that the survey itself expired. Check your Survey Options in the Edit Survey tab. Next to Survey Protection, the default setting is 'This survey does not expire.' If you changed the default setting make sure your survey is still valid.

**Message:** This survey has expired.

**Solution:**

- This message means that the survey itself has expired. Check your Survey Options in the Edit Survey tab. Next to Survey Protection, the default setting is 'This survey does not expire.' If you changed the default setting make sure that the end date has not passed.

**Message:** Thank you for your time, unfortunately this survey has been closed.

**Solution:**

- Check to make sure there is still a green check next to your survey in the My Surveys tab in Qualtrics. You may have accidentally closed the survey.

For further support in using Qualtrics, visit Qualtrics University at <http://www.qualtrics.com/university/researchsuite/>. If you cannot find a solution at Qualtrics University, email Qualtrics at [support@qualtrics.com](mailto:support@qualtrics.com) or call 1-800-340-9194.

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