

Qualtrics at FDU: An introduction to online data collection

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BF/CO

Qualtrics Link

<https://fdu.co1.qualtrics.com>

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Goals of this Workshop

Primary Goals

- Understand what Qualtrics is
- Understand the benefits of Qualtrics as a research or teaching tool
- Understand the basic question types required for the development of Qualtrics surveys
- Learn how to implement the basic question types to conduct online research

Secondary Goal

- Gain knowledge about more advanced skills to optimize use of Qualtrics (to be covered in a future workshop)

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What is Qualtrics?

- Qualtrics is a simple web-based survey tool that provides the opportunity to conduct online survey research, evaluations, and many other data collection activities
- One of the many advantages is the ease of learning to use Qualtrics to:
 - Build surveys with multiple question styles
 - Distribute the surveys with a website link (there are other ways to distribute as well)
 - Analyze data collected
- Of great importance, the university currently has a license for all faculty, staff, and students (some caveats with student accounts that we can discuss if you all desire) so this tool is **FREE**

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Benefits of Qualtrics

- Simple and intuitive formatting of surveys
- Visually appealing for respondents and survey builder
- Computer and smartphone compatible
 - Opportunity for in-class “clicker-like” function, as well as general teaching demonstration uses
- Flexibility of survey dissemination
- Multiple data formats (e.g., CSV, TSV, XML, SPSS)
- Did we mention it is [FREE](#)?

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Qualtrics - Dashboard

The Qualtrics logo, consisting of four colored dots (blue, green, yellow, red) followed by the word "qualtrics." in a sans-serif font.

All Projects	34
Shared with Me	9
Uncategorized	10
Archive (non-active)	2
FDU service	6
Honors thesis studies	4
Teaching-related surveys	9
Text	0
UH studies	3
+ New Folder	

Text Project Name ▾



There are no items in this folder.

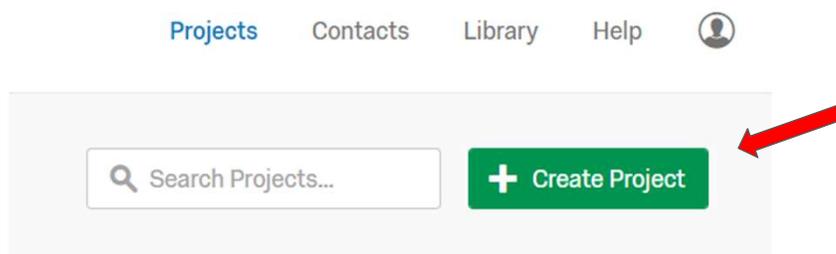
[Projects](#) [Contacts](#) [Library](#) [Help](#) 

[+ Create Project](#)

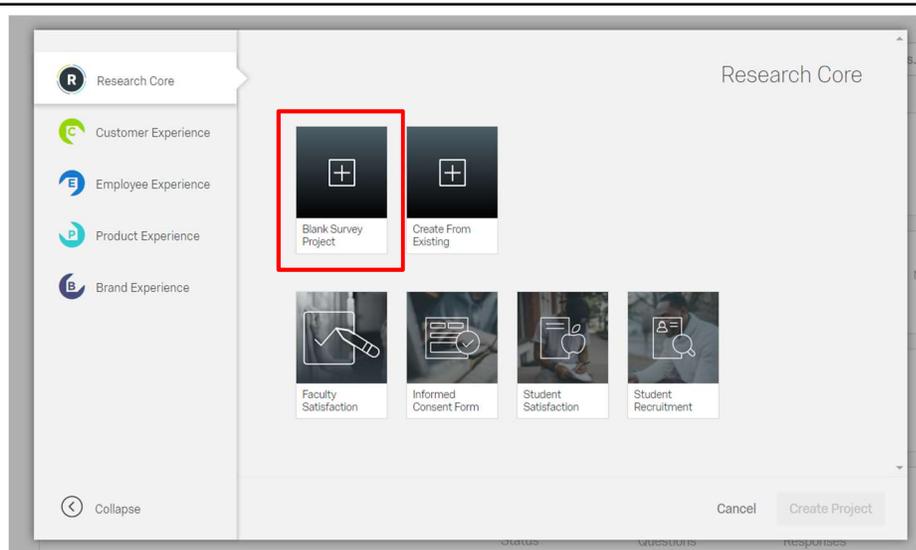
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How to make a project

Upon logging into your Qualtrics account, you will see a bare dashboard - in the top right-hand corner, you will see the “Create Project” button.

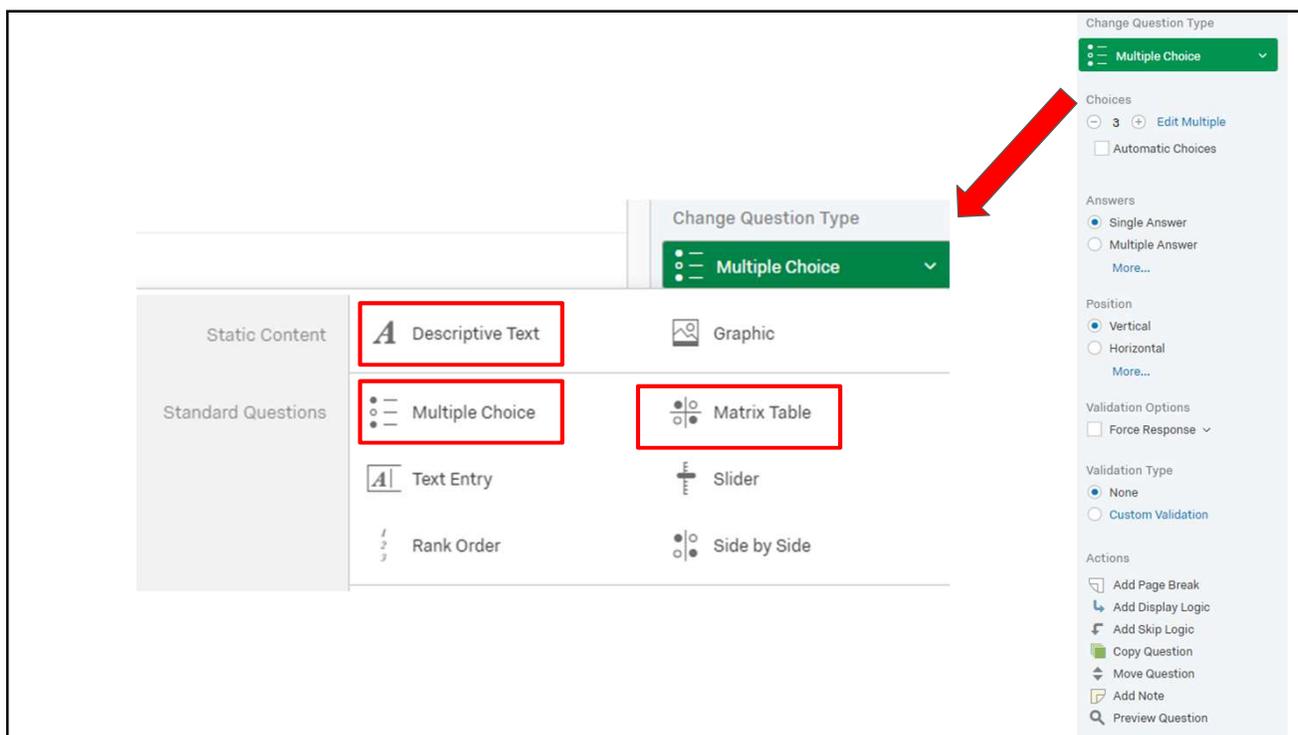
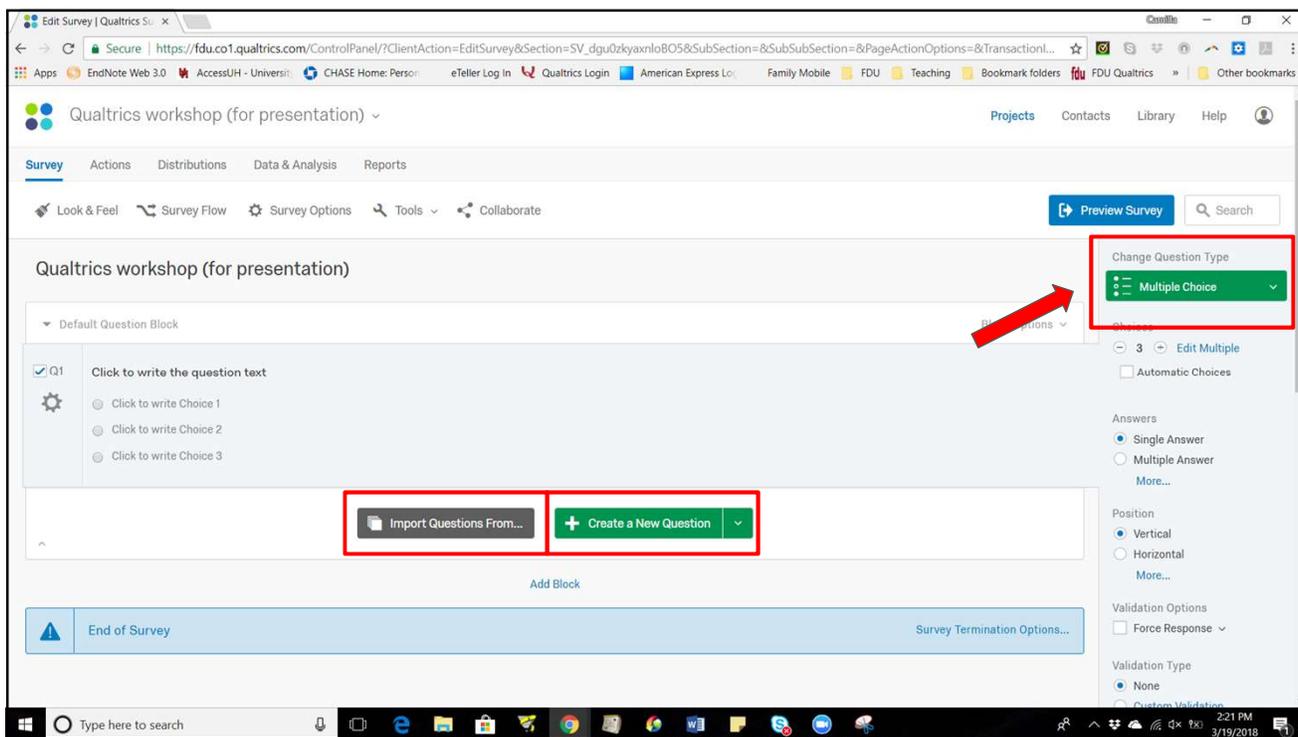


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You will then be asked to give the project a name.

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Different question types

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Descriptive text

In surveys, it is often necessary to provide respondents with instructions. Those are provided in “descriptive” question types.

The screenshot displays a survey editor interface. A dropdown menu is open, showing options for question types: 'Static Content', 'Standard Questions', and 'Descriptive Text'. The 'Descriptive Text' option is highlighted with a red box. A red arrow points from this option to a question editor below. The question editor shows a question labeled 'Q6' with the text 'You can provide instructions in a "descriptive text" type question.' The editor also includes tabs for 'Rich Content Editor...', 'Piped Text...', 'HTML View', and 'Normal View', and an 'Edit Question Label' button.

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Descriptive text

In surveys, it is often necessary to provide respondents with instructions. Those are provided in “descriptive” question types.

Rich Content Editor... Piped Text...

Q6 You can provide instructions in a "descriptive text" type question.

Once the question type is chosen, you can edit the text in the “Rich Content Editor”.

Rich Content Editor... Piped Text...

Q6 (a) Font Size B I U x₂ x² A A

You can provide instructions in a "descriptive text" type question.

Multiple Choice

Change Question Type

Multiple Choice

Static Content

Standard Questions

Descriptive Text

Graphic

Multiple Choice

Matrix Table

Text Entry

Slider

Rank Order

Side by Side

Change Question Type

Multiple Choice

Choices

3 Edit Multiple

Automatic Choices

Answers

Single Answer

Multiple Answer

More...

Position

Vertical

Horizontal

More...

Validation Options

Force Response

Validation Type

None

Custom Validation

Actions

Add Page Break

Add Display Logic

Add Skip Logic

Copy Question

Move Question

Add Note

Preview Question

Multiple Choice

Change Question Type

- Multiple Choice

Choices

3 Edit Multiple

Automatic Choices

Change Question Type

- Multiple Choice

Choices

7 Edit Multiple

Automatic Choices

Disagree - Agree

Reverse Order

- Disagree - Agree
- Dissatisfied - Satisfied
- Inappropriate - Appropriate
- Male - Female
- True - False
- Yes - No
- Below Avg - Above Avg
- Worse - Better
- Difficult - Easy
- Ineffective - Effective
- Bad - Good

Strongly agree

Agree

Somewhat agree

Neither agree nor disagree

Somewhat disagree

Disagree

Strongly disagree

Done

Cancel

Multiple Choice

Choices

Edit Multiple

Automatic Choices

Disagree - Agree

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Multiple Choice

Vertical

This workshop is amazing!!

- Strongly agree
- Agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Disagree
- Strongly disagree

Horizontal

This workshop is amazing!!

Strongly agree Agree Somewhat agree Neither agree nor disagree Somewhat disagree Disagree Strongly disagree

Change Question Type

- Multiple Choice

Choices

7 Edit Multiple

Automatic Choices

Answers

Single Answer

Multiple Answer

More...

Position

Vertical

Horizontal

More...

Label Position

Above

Side

BF/CO

Multiple Choice

Use of Multiple Answers

The screenshot shows a configuration panel for a 'Multiple Choice' question. The 'Change Question Type' dropdown is set to 'Multiple Choice'. Under the 'Choices' section, there are 3 choices and an 'Automatic Choices' checkbox. Under the 'Answers' section, the 'Multiple Answer' radio button is selected and highlighted with a red box. A red arrow points from this box to the question text below: 'Which of the following describe your feelings about this survey? (you may select more than 1 option)'. Below the text are three checkboxes: 'Interesting', 'Useful', and 'Exciting'.

BF/CO

Multiple Choice

Force Response vs. Request Response

The screenshot shows a configuration panel for a 'Multiple Choice' question. The 'Change Question Type' dropdown is set to 'Multiple Choice'. Under the 'Answers' section, the 'Multiple Answer' radio button is selected. Under the 'Position' section, the 'Vertical' radio button is selected. At the bottom, the 'Validation Options' section has a 'Force Response' dropdown menu highlighted with a red box. A red arrow points from this box to a separate 'Validation Options' panel on the left, which shows 'Force Response' and 'Request Response' as options.

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Matrix Table

Click to write the question text

	Click to write Scale point 1	Click to write Scale point 2	Click to write Scale point 3
Click to write Statement 1	○	○	○
Click to write Statement 2	○	○	○
Click to write Statement 3	○	○	○

↓

This workshop is

	Strongly agree	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree	Strongly disagree
Interesting	○	○	○	○	○	○	○
Useful	○	○	○	○	○	○	○
Exciting	○	○	○	○	○	○	○

Change Question Type

Matrix Table

Statements

⊖ 3 ⊕ [Edit Multiple](#)

Automatic Statements

Scale Points

⊖ 3 ⊕ [Edit Multiple](#)

Automatic Scale Points

Labels

⊖ 0 ⊕

Matrix Type

Likert

Bipolar

[More...](#)

Answers

Single Answer

Multiple Answer

Dropdown List

Drag and Drop

Text Entry

This workshop is

Change Question Type

Text Entry

Text Type

Single Line

Multi Line

Essay Text Box

Form

Password

Validation Options

Force Response ▾

Validation Type

None

Minimum Length

Maximum Length

Character Range

Content Validation

[Custom Validation](#)

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Text Entry

This workshop is

Validation Type

- None
- Minimum Length
- Maximum Length
- Character Range
- Content Validation
- Custom Validation

Minimum Characters Required

Change Question Type

Text Entry

Text Type

- Single Line
- Multi Line
- Essay Text Box
- Form
- Password

Validation Options

Force Response

Validation Type

- None
- Minimum Length
- Maximum Length
- Character Range
- Content Validation
- Custom Validation



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Text Entry

You might want to restrict the type of information entered by the participant

Validation Type

- None
- Minimum Length
- Maximum Length
- Character Range
- Content Validation
- Custom Validation

Content Type

- Email Address
- US Phone Number
- US State
- US Postal Code
- Date (mm/dd/yyyy)
- Number
- Text Only (Non-numeric)

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Slider

Click to write the question text

0 10 20 30 40 50 60 70 80 90 100

Click to write Choice 1

Click to write Choice 2

Click to write Choice 3

Change Question Type

Slider

Choices

3 Edit Multiple

Automatic Choices

Labels

0 Edit Multiple

Automatic Labels

Type

Bars

Sliders

Stars

Grid Lines

10

Snap to Grid

Min Value

0

Max Value

100

Number of Decimals

0

Number of Decimals

0

Options

Show Value

Custom Start Position

Not Applicable

Mobile Friendly

Center Labels

Validation Options

Force Response

Validation Type

None

Custom Validation

BF/CO

Rank order

Specialty Questions

Advanced

1 Rank Order

2

3

Drag and Drop

Drag and Drop Graphic

Radio Buttons

Horizontal

Horizontal Graphic

Horizontal Text Entry

Selection Box

Vertical

Vertical Graphic

Vertical Text Entry

You can ask respondent questions, in which they have to rank order their choices.

Fx. Order of importance of values to them, order of preference of products.

Click to write the question text

215

Click to write Item 1 1

Click to write Item 2 2

Click to write Item 3 3

BF/CO

Rank order

Items

5 [Edit Multiple](#)

Automatic Items

Type

Drag and Drop
 Radio Buttons
 Text Box
 Select Box
[Less...](#)

In which order to you prefer the following brands?

- Toyota 1
- Mazda 2
- Subaru 3
- Honda 4
- Chevy 5

The above item is in a drag-and-drop format. However, many options are available; these can be found in the left-hand side of the screen.

There, you can also edit the number of options available to the respondent. Simply click “edit multiple”.

BF/CO

Rank order

Items

5 [Edit Multiple](#)

Automatic Items

Type

Drag and Drop
 Radio Buttons
 Text Box
 Select Box
[Less...](#)

As radio Buttons

Q2 In which order to you prefer the following brands?

	1	2	3	4	5
Toyota	<input type="radio"/>				
Chevy	<input type="radio"/>				
Honda	<input type="radio"/>				
Mazda	<input type="radio"/>				
Subaru	<input type="radio"/>				

As a “Select Box”

In which order to you prefer the following brands?

Toyota

Chevy

Honda

Mazda

Subaru

[Click here to edit choices](#)

BF/CO

Side-by-side

	How often do you order from these restaurants:			How do you order it?		
	Always	Sometimes	Never	Carryout	Delivery	Dine in
Pizza Hut	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Domino's	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Little Caesar's	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Papa John's	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

BF/CO

Side-by-side

Side-by-side questions look like this when you first select it. However, it is very easy to customize.

Click to write the question text

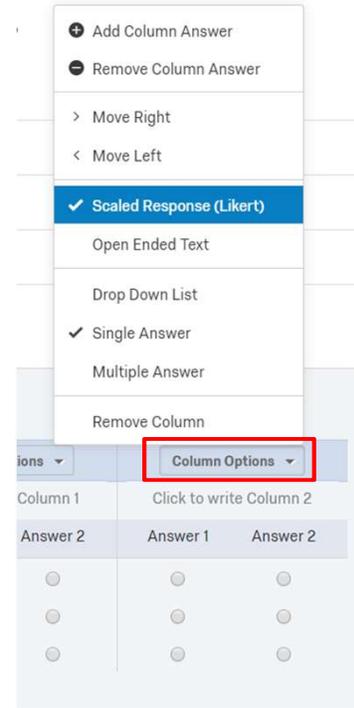
	Click to write Column 1		Click to write Column 2	
	Answer 1	Answer 2	Answer 1	Answer 2
Click to write Statement 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Click to write Statement 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Click to write Statement 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

BF/CO

Side-by-side

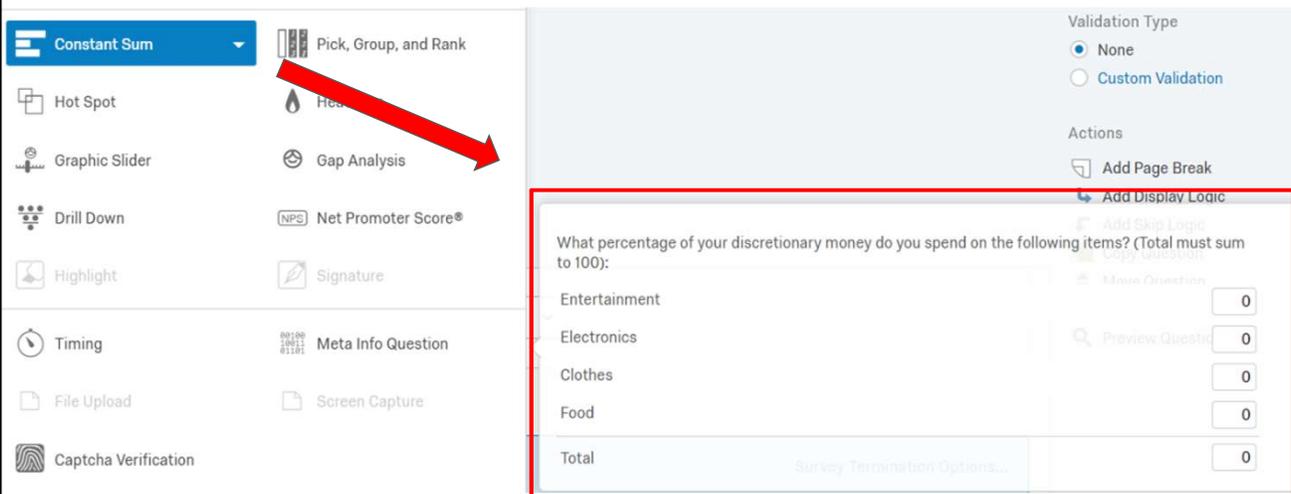
Side-by-side questions are very customizable. You can:

- Have multiple columns
- Make each column a different response format
 - Likert-type response
 - single answer
 - multiple answer
 - drop-down menu
 - Open-ended (write in answer)



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Constant sum



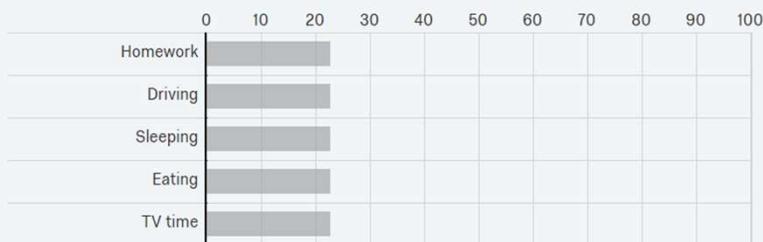
BF/CO

Constant sum

Here, I made the question be in bar format.

Moreover, I have set a delimiter that it must total 100.

Percent time spent on various activities; must total 100%



Type

Choices

Bars

Sliders

Grid Lines

10 +

Min Value

0 +

Max Value

100 +

Number of Decimals

0 +

Options

Show Value

Custom Start Position

Validation Type

None

Must Total

Custom Validation

Choices Must Total

100

Timing

- Can be used for:
 - Recording how long a participant is on a specific screen
 - This can measure length of time spent on a task
 - Time needed to complete the task
 - Requiring a participant to wait on a screen to
 - Respond after a specific amount of time
 - Advance the participant to the next screen after a set amount of time

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Timing

The screenshot shows a question type selection interface. On the left, there is a vertical sidebar with categories: 'Static Content', 'Standard Questions', 'Specialty Questions', and 'Advanced'. The 'Advanced' category is selected. The main area displays a grid of question types. The 'Timing' option, represented by a clock icon, is highlighted with a red rectangular box. Other visible options include Descriptive Text, Graphic, Multiple Choice, Matrix Table, Text Entry, Slider, Rank Order, Side by Side, Constant Sum, Pick, Group, and Rank, Hot Spot, Heat Map, Graphic Slider, Gap Analysis, Drill Down, Net Promoter Score®, Highlight, Signature, File Upload, Screen Capture, and Captcha Verification. A 'Multiple Choice' dropdown menu is open at the top right. The text 'BF/CO' is located in the bottom right corner.

Timing

This question lets you record and manage how long a participant spends on this page. This question will not be displayed to the participant.

The screenshot shows the configuration panel for the 'Timing' question type. The 'Change Question Type' dropdown is set to 'Timing'. Below it, the 'Enable submit after (seconds)' field is highlighted with a red rectangular box and contains the value '0'. Below this is the 'Auto-advance after (seconds)' field, also containing '0'. At the bottom, there is a checkbox labeled 'Show Timer' which is currently unchecked. The text 'BF/CO' is located in the bottom right corner.

Timing

This question lets you record and manage how long a participant spends on this page. This question will not be displayed to the participant.

Change Question Type

Timing ▾

Enable submit after (seconds)

− 0 +

Auto-advance after (seconds)

− 0 +

Show Timer

BF/CO

Timing

This question lets you record and manage how long a participant spends on this page. This question will not be displayed to the participant.



Change Question Type

Timing ▾

Enable submit after (seconds)

− 0 +

Auto-advance after (seconds)

− 0 +

Show Timer

Count Down

Count Up

Seconds to Count

− 0 +

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Formatting options

BF/CO

Blocks

Survey Actions Distributions Data & Analysis Reports

Look & Feel Survey Flow Survey Options Tools Collaborate

Qualtrics workshop (for presentation)

▼ Default Question Block Block Options ▼

Q1 Click to write the question text

- Click to write Choice 1
- Click to write Choice 2
- Click to write Choice 3

Import Questions From... Create a New Question ▼

Add Block

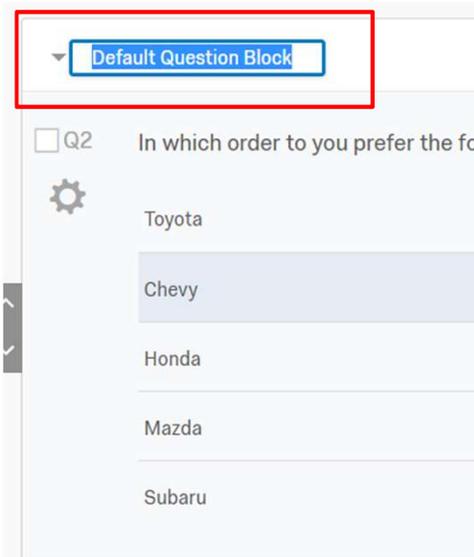
Blocks are containers for questions. By default, you start with 1 block. However, you can add more blocks. Adding more blocks may be useful, depending on the purpose of your survey. Simply click “add block”, which can be found below each block.

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Block naming and question naming

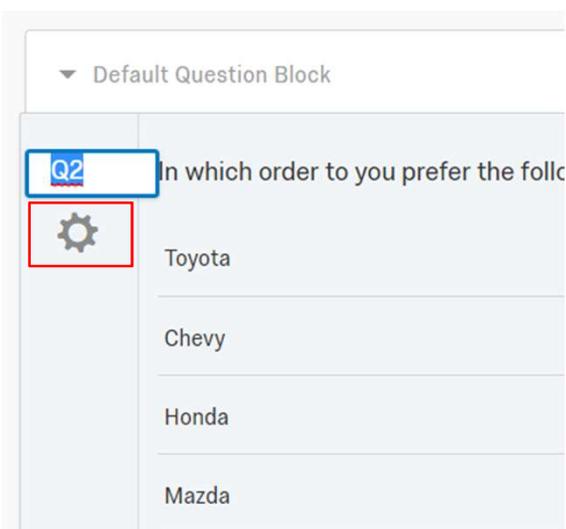
You can name your blocks

- This is particularly useful if you have many blocks.
- Participants will not see the block name (they will not know there are blocks)
- You may wish to do a separate block for each survey, or for each condition in your survey/experiment (see below about survey flow).



BF/CO

Block naming and question naming



You can name your questions.

- This is particularly useful when you download the data; your variables will already be named for you.
- Participants will not see this label
- As a more advanced option, you can also edit the variables names by:
 - Click wheel under variable name
 - Select "recode values"
 - Select "variable names"

BF/CO

Page Break and other options

In the right-hand side, you may be able to format your survey in a number of ways.

Page Break and other options

In the right-hand side, you may be able to format your survey in a number of ways:

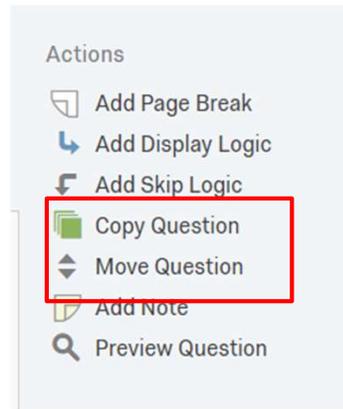
- You may be able to add page breaks
 - Useful if you have a long block of questions, or between matrix questions

BF/CO

Page Break and other options

In the right-hand side, you may be able to format your survey in a number of ways:

- You may be able to add page breaks
 - Useful if you have a long block of questions, or between matrix questions
- You can copy or move questions from one part of the survey to a different part

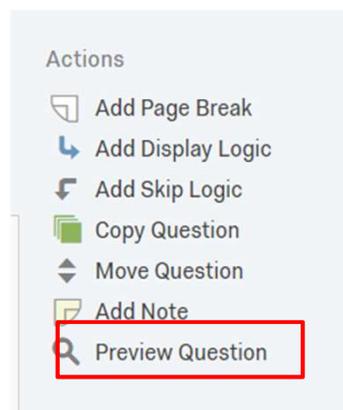


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Page Break and other options

In the right-hand side, you may be able to format your survey in a number of ways:

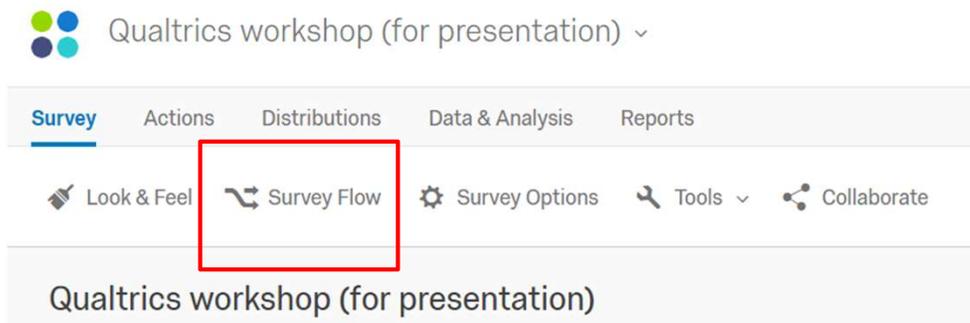
- You may be able to add page breaks
 - Useful if you have a long block of questions, or between matrix questions
- You can copy or move questions from one part of the survey to a different part
- And you can preview specific questions, so you can see if you set it up correctly



BF/CO

Survey Flow

There are several settings about the survey that are useful. One is the survey flow, where you can change the order of the presentation of blocks.

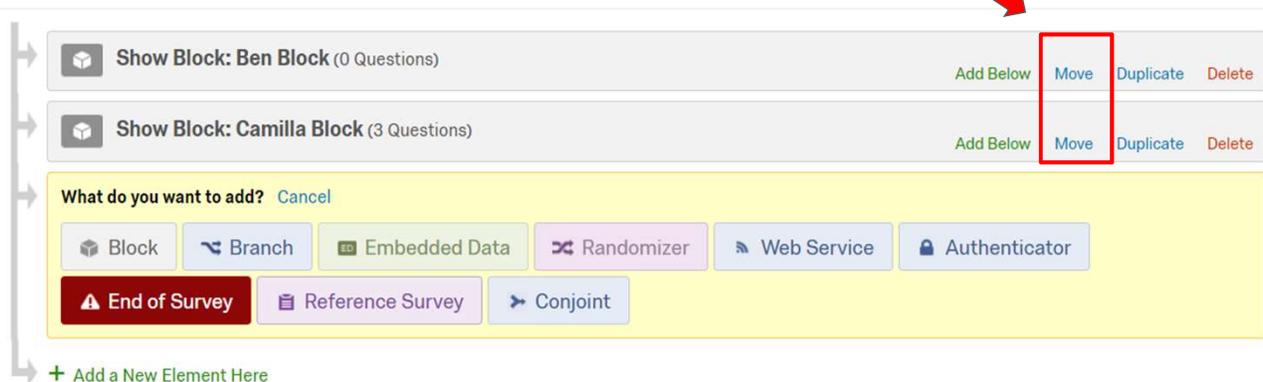


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Survey Flow

You can drag blocks to re-order them.

Survey Flow Qualtrics workshop (for presentation)



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Survey Flow

You can add elements between or below existing blocks.

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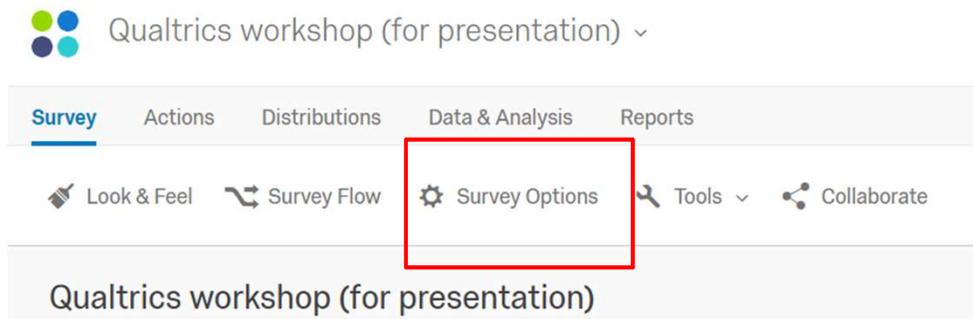
Survey Flow

Survey Flow Qualtrics workshop (for presentation)

At the end of your survey, you should always add an “end survey” command. This ensures that the data is registered in the system

Other survey options

There are several settings about the survey that are useful. One is the survey options, which allow you to edit options about how the survey functions.



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Survey Options

Survey Experience

- Back Button.** Enable respondents to change their responses.
- Save and Continue.** Allow respondents to save and continue later.
- Show Question Numbers.** Great for previews. For participants, try a [Progress Bar](#) instead.
- Use Custom Survey Validation Messages...**

Survey Language: The language the survey is written in.

Survey Title: This text will appear in the browser as the window or tab title.

Meta Description: Search engines and social media services use this description.

Survey Protection

- Open Access.** Allow anyone to take this survey.
- By Invitation Only.** Prevent people from taking the survey using an anonymous survey link.
- Password Protection.** This password must be entered to take this survey:
- Prevent Ballot Box Stuffing.** Keep people from taking this survey more than once.
- HTTP Referrer Verification.** The user must come from this URL to take the survey:
- Prevent Indexing.** A tag will be added to the survey to prevent search engines from indexing it.
- Secure Participants' Files.** Files uploaded as responses can only be viewed by users with permission to view responses.
- Survey Expiration.** The survey will only be available for a specified date range.

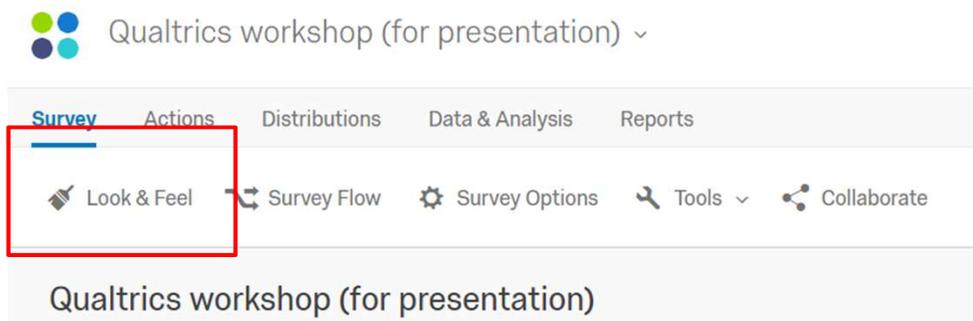
Survey

- Default end of survey message.**

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Look and Feel of the survey

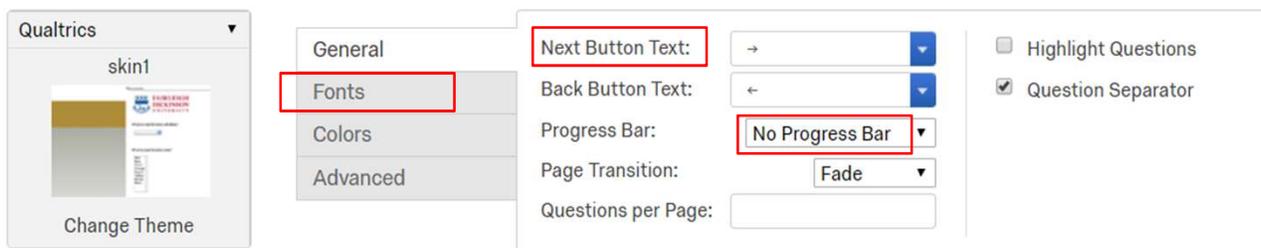
There are several settings about the survey that are useful. One is the look and feel, in which you can change font type, size, and color as well as the theme (skin).



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Look and Feel of the survey

Qualtrics workshop (for presentation)



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Distribution of survey

Qualtrics workshop (for presentation) ▾

Survey Actions **Distributions** Data & Analysis Reports

Email **Web** Social Mobile

Embed your survey link on a website
[Use Anonymous Link](#)

Target specific customers on your website
[Create a Site Intercept](#)

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Collaborate with others

★ Qualtrics workshop (for presentati...
Survey · Modified Mar 19, 2018

NEW Status 1 Questions 0 Languages 1 minute Est. Response Time

0 Languages

- ✓ Activate
- Collaborate
- Rename Project
- Copy Project

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Collaborate on Project: Qualtrics workshop (for presentation)

Type Username or Email...  Add [User and Group Address Book](#)

User Edit View Reports Activate/Deactivate Copy Distribute

Type Username or Email...  Add [User and Group Address Book](#)

User Edit View Reports Activate/Deactivate Copy Distribute

User	Edit	View Reports	Activate/Deactivate	Copy	Distribute
 Ben Freer	<input checked="" type="checkbox"/> Details	<input checked="" type="checkbox"/> Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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Survey Preview

When you have finished building your survey, you may want to preview it, and test it out, to make sure it runs as you intend.

The full survey will now pop out into a new browser window.

We recommend extensive testing out your survey before you send it out to respondents.

Projects Contacts Library Help 

 Preview Survey

Block Options ▾

Change Question Type

Multiple Choice ▾

Choices

3 Edit Multiple

Automatic Choices

Answers

Single Answer

Multiple Answer

[More...](#)

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More advanced options

There are a number of options that we have not covered today, but that may be of use to you:

- You can randomize people to different questions, set up skip-logic of questions, and counter-balance survey blocks.
- You can be able to upload graphics (still pictures) as well as videos
- You can pipe in responses from a previous question into the survey text or as a response option in a future question
- You can embed meta-data (e.g., sona ID, survey responses from one survey to another)
- You can distribute the survey to specific individuals; this will allow you to customize the survey to them (through embedded data).
- And much more....

BF/CO

Thank you for today!

If you have questions, you can reach out to us:

Ben Freer (bfreer@fdu.edu)

Camilla Overup (coverup@fdu.edu)

BF/CO

Survey Flow

Survey Flow Qualtrics workshop (for presentation)

The screenshot shows a survey flow editor with two existing blocks: 'Show Block: Ben Block (0 Questions)' and 'Show Block: Camilla Block (3 Questions)'. Below them is a yellow 'What do you want to add?' menu with options: Block, Branch, Embedded Data, Randomizer, Web Service, Authenticator, End of Survey, Reference Survey, and Conjoint. The 'Randomizer' option is highlighted with a red box, and a red arrow points to it from below.

If you do an experiment, it may be of use to you to use a “randomizer” - this will allow you to randomly assign people to conditions.

BF/CO

Survey Flow

The screenshot shows a 'Randomizer' block in the survey flow. The text 'Randomly present 1 of the following elements' is visible, with the number '1' highlighted in a red box. Below the randomizer, two blocks are listed: 'Show Block: Camilla Block (3 Questions)' and 'Show Block: Ben Block (0 Questions)'. Blue arrows point from the randomizer to these two blocks.

If you use a randomizer, you will need to move the blocks representing your conditions into the space below the Randomizer. Moreover, you should adjust the number within the randomizer

- 1 = the randomizer will only display one block.
- X (number of blocks) = the randomizer will show all blocks in random order

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