

# Qualtrics User Manual



For University of Michigan-Flint Users

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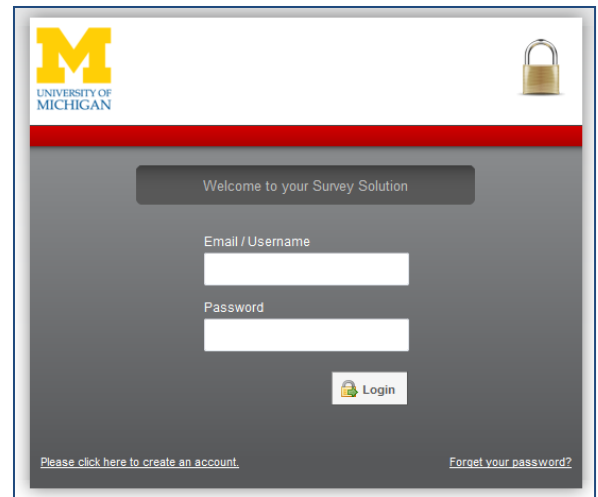
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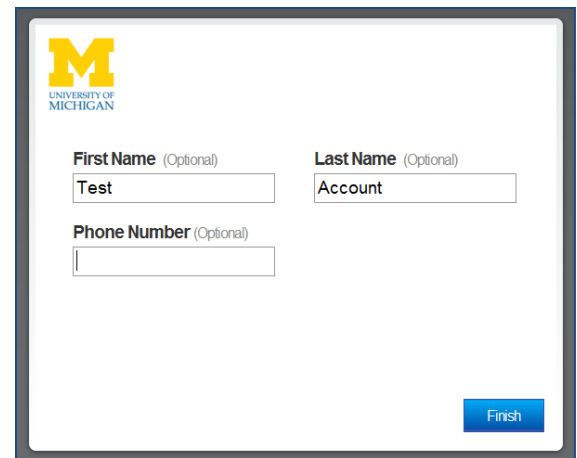
## Launching Qualtrics

To begin using Qualtrics:

1. Go to <http://umflint.qualtrics.com>
2. On the login page, enter your User Name/email address and password. First time users, you can create an account by clicking on “Please click here to create an account” or you can contact Andre Louis at [alouis@umflint.edu](mailto:alouis@umflint.edu) to request an account. \*Note\* if you create your own account, you *must* use your UM-Flint email address ([uniquename@umflint.edu](mailto:uniquename@umflint.edu)). You can use whatever password you like (it does *not* have to be your LAN password. In fact, it probably shouldn't).
3. In creating your account, *please* use your correct first name and last name when prompted. This helps the Brand Administrators identify users.
4. Click “Sign Me Up” to activate your account through email verification.
5. Follow the steps sent to your email address to activate your account.



The login page features the University of Michigan logo in the top left and a padlock icon in the top right. A red horizontal bar is positioned below the logo. The main content area has a dark gray background with the text "Welcome to your Survey Solution" in a light gray box. Below this, there are two white input fields labeled "Email / Username" and "Password". A "Login" button with a padlock icon is located below the password field. At the bottom of the page, there are two links: "Please click here to create an account." on the left and "Forgot your password?" on the right.



The account creation page features the University of Michigan logo in the top left. It contains three input fields: "First Name (Optional)" with the text "Test", "Last Name (Optional)" with the text "Account", and "Phone Number (Optional)". A blue "Finish" button is located in the bottom right corner.









# My Surveys

After you successfully log in to Qualtrics, you will find yourself in the **My Surveys** Dashboard. This area allows you to create and edit surveys, view results from surveys you have created, share surveys with other users, create duplicate copies or surveys, access the Qualtrics library and perform several other functions.



# Tasks Toolbar

After you have created a survey, it will show up at the bottom of your **My Surveys** Dashboard, otherwise known as your Tasks Toolbar. The following features are included:

★	Active	Name	Responses	Creation Date	Modified	Tasks							
My Surveys													
★	<input type="checkbox"/>	MKT Introduction to Qualtrics Sample Modified on: Sep 23, 2010	0	September 22	September 23								
						Edit	Results	Send	View	Collaborate	Copy	Translate	Delete

**Star Marker:** The star marker icon can be clicked to turn it bright yellow. This feature has no function other than letting you mark surveys in a special way. If you have many surveys but don't utilize the folder system, this method will allow you to locate surveys easily.

**Active Survey:** Once a survey has been activated, it will be marked with the green checkmark. However, it can still be deactivated without being deleted. Simply click on the green checkmark and confirm in the popup window that you do want to close the survey. It can be reactivated again using the same methods for initial activation. The link will remain the same.

**Responses:** The number of attempted responses is shown. This value includes complete AND incomplete responses.

**Creation Date:** Date of survey creation

**Modified:** Date of last modification

**Edit:** Takes you to the Edit Survey Tab

**Results:** Takes you to the View Results Tab

**Send:** Takes you to the Distribute Survey Tab

**View:** Preview the survey as it will appear to respondents. To move quickly through the survey, click “Ignore Validation”. You will not have to answer questions to advance.

☐ Ignore Validation  
-more options-

[Click Here to Start Over](#)

**Collaborate:** This function allows you to share your survey with other users. This is great for when you are doing collaborative work with other users and would like everyone to have access to a survey.

1. In order to share a survey, you will need to know your collaborators' Qualtrics usernames. Or, you can go through the “Address Book” which will list everyone in your brand that has an account. Usually their username is the same as their unickname. Some usernames are an individual's full email address.
2. Once you have the username in there, their name should appear. If this is the correct person, click “Add.” When you do this, a whole list of options will appear to the right. This is where you choose what editing capabilities this person will have. By clicking “Select All” you are giving them full ability to edit the survey.

**Copy:** Copy the survey to another user's account or library or make a copy of the survey in your own account. This is very useful when you are developing several different versions of a survey or trying to decide on which survey design to use.

**Translate:** This option allows you to create foreign translations of your question and answer choices, either using "google translate" or by typing your own translations

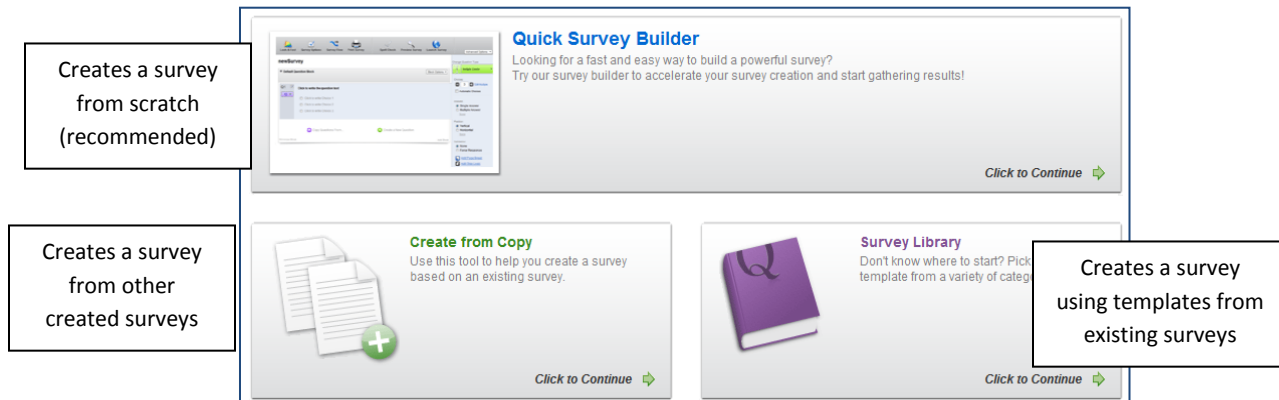
**Delete:** Deletes the entire survey from your account. It will also be deleted from the accounts of people sharing it. This only appears for surveys that you own. For surveys that are shared with you, but you do not own, you will see a “remove” icon that will remove the survey from “My Survey” but will not delete the survey from the owner's account.



## Creating a New Survey

To create a new survey:

Click on the **Create Survey** icon in the gray menu area located in the middle of the Dashboard page. From there, you will see the following page:



From the Quick Survey Builder option, begin assembling your survey. Give your survey a name, create a folder to organize your surveys (optional) and click **Create Survey**.


The 'Create a New Survey' form contains the following fields and buttons:

- Survey Name**: Text input field with 'Test' entered.
- Folder**: Dropdown menu with 'Test Folder' selected.
- Account for Survey**: Dropdown menu with 'My Account: Andre Louis' selected.
- Buttons**: 'Cancel' (with a red X icon) and 'Create Survey' (with a green checkmark icon).

## Folder Management (Optional)

If you anticipate that you will have a large variety of surveys, folders are useful. However, having folders is not necessary.


1. Click on the "My Surveys" tab
2. Click on the "Manage Folders" link located above the survey list
3. To add a folder

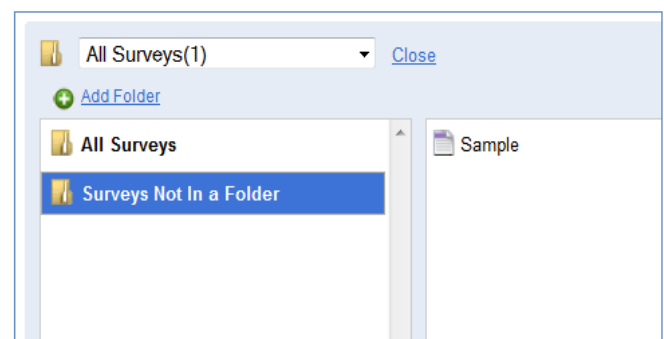
Click  [Add Folder](#)

Type in the new name of your folder

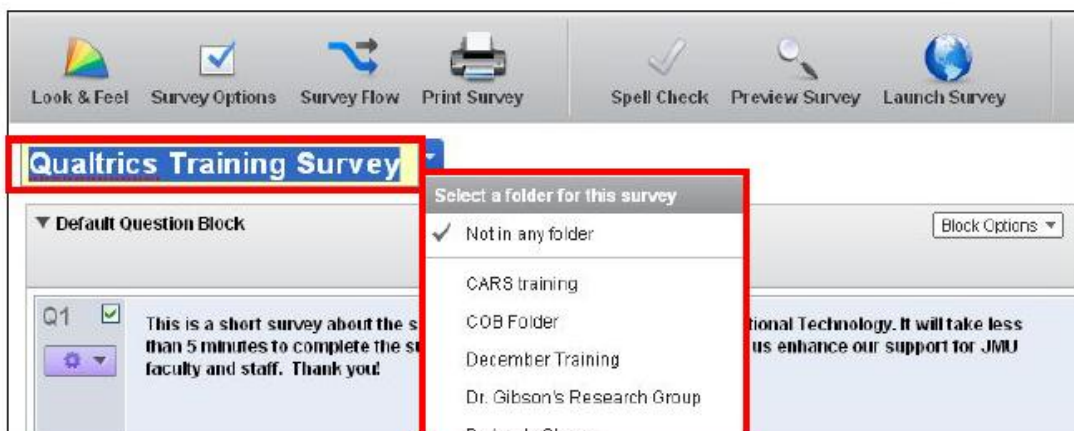
4. To rename a folder, double-click the folder name.
5. To delete a folder

Select a folder

Click the red circle to delete  [Delete Folder](#)



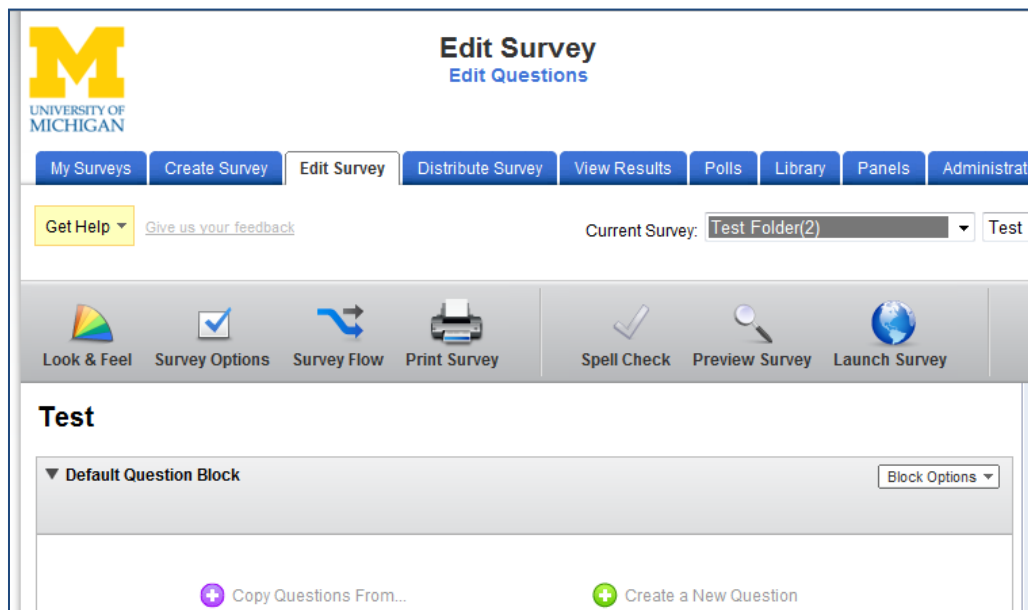
Surveys can be re-arranged into different folders with the **Select a folder for this survey** drop-down list to the right. As a side note, in the same view, the title of a survey can be changed easily by clicking on it in the survey edit view and typing the changes.



## Adding Survey Questions

To add questions to your survey:

Either click **Create a New Question** (to start a new question from scratch) or click **Copy Questions From...** (to select a question from a library of surveys).



## Copying Questions

Qualtrics allows users to copy questions either from a library of survey templates designed by Qualtrics or from any user-created survey libraries. To use this option, simply select a library, select a survey, and review/select specific survey questions. Once the question you want is added to your survey, you can edit it as necessary.



To copy questions from a library:

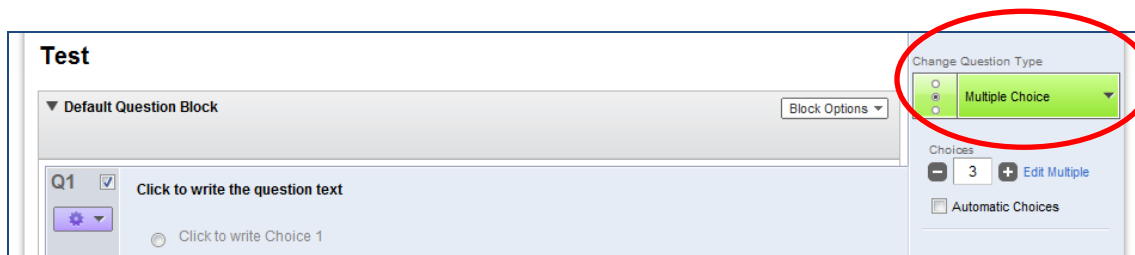
1. In Edit Survey, click on “Copy Questions From” at the bottom of the page to select questions from an existing template.
2. Select the library from which you want to take questions.
3. Select the survey from which you want to take questions.
4. Highlight the desired question or group of questions from the left-hand panel.
5. Add the questions to your survey (blue button at bottom of right panel).

**\*\*Note:** If at any time you wish to exit out of a pop-up window, simply click on an area outside of the window and the pop-up will disappear.\*\*

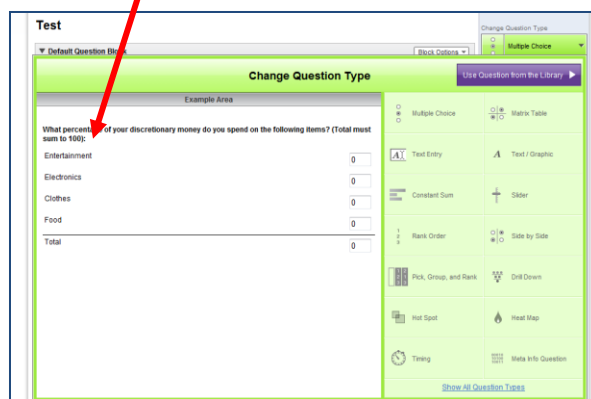
## Create a New Question

To create a new question from scratch:

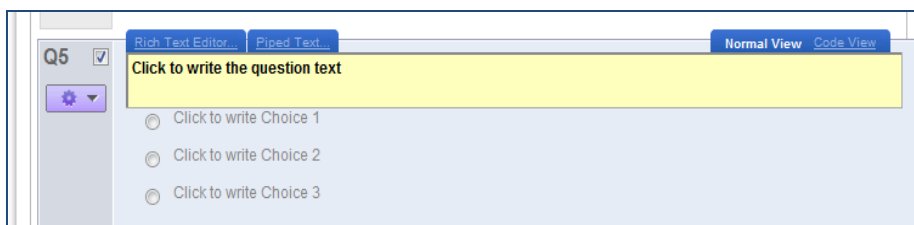
1. Click **Create a New Question**
2. Determine the **Question Type**. By default, **Multiple Choice** is selected. However, you can use the drop down menu in the green box on the right to determine the kind of question you would like to use.



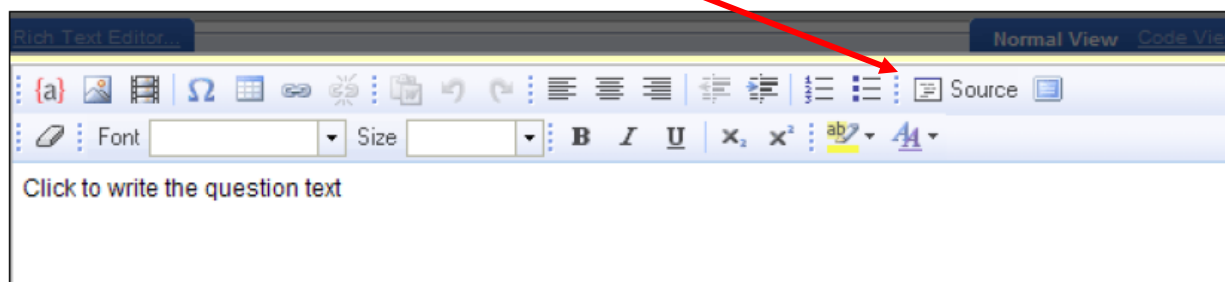
To find the question type you need, click the green box. Move your mouse over each type to see a preview of the question displayed in the **Example Area**.



3. Navigate through the question types available. You can also expand the list by clicking the **Show All Question Types** at the bottom of the green window.

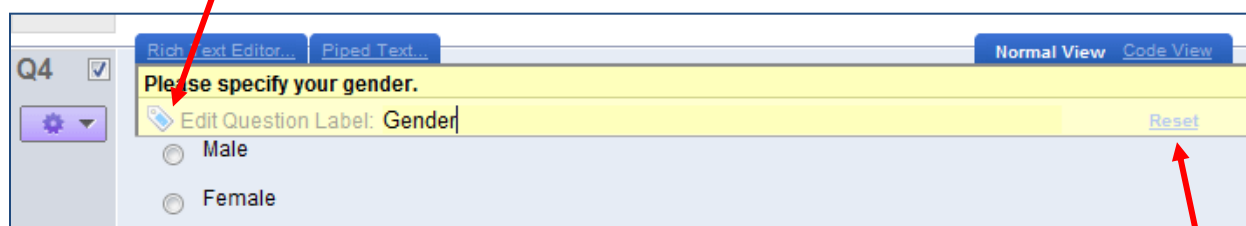


- Click in the yellow text box to **enter your question text**.
- If you click on the **Rich Text Editor** prompt above the text box, you can format the question using the WYSIWYG formatting option ("What You See Is What You Get"). Here, you can insert images and symbols, add hyperlinks, use various font editing tools, and add HTML code (by clicking on the **Source** button)



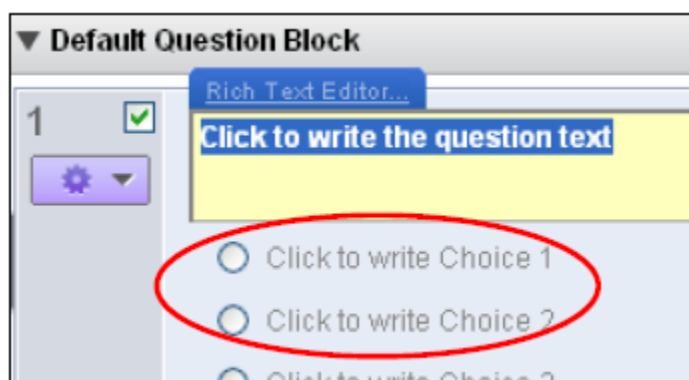
- Optional: Create a label for each question. Labels are a helpful tool to shorten the text that will appear if you decide to view results by question or in the columns if you export your data into programs like Excel or SPSS. When you change the label of a question, it is also used when setting up **Skip and Branch Logic**, **Quotas**, and **Triggers**.

To create a label, find and click the icon at the bottom left of the text field.

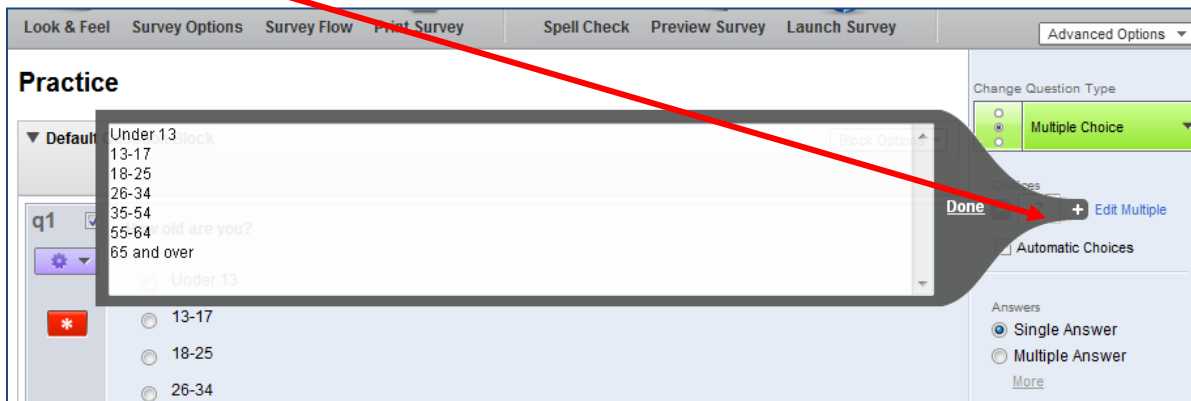


Initially, you will see a preview of the current question text. Edit the label name to whatever you desire. If you would like to remove a label and go back to using the full question text, simply click **Reset**.

- To type in response options, click on **Click to write Choice 1** (2, 3, etc). You may also copy and paste responses from a Word document or text file...



...or click **Edit Multiple** to type or copy/paste a series of response options in the gray window:



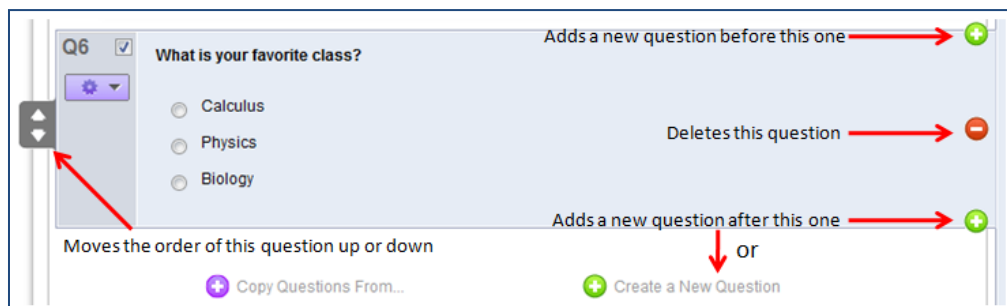
- Optional: By clicking on individual responses, a blue down with a down arrow will appear. This option allows you to add further dimension to your answer options. You can create a text box to allow users to enter textual responses, insert graphics, apply display logic, exclude certain options from analysis, etc. The options available depend on the question type you select.

Repeat steps 1-8 to add additional questions.

## Rearranging, Deleting, and Restoring Questions

Qualtrics also allows you to control the placement, deletion, and restoring of questions. To add a new question before/after a question you have already created:

Move your mouse to the question:



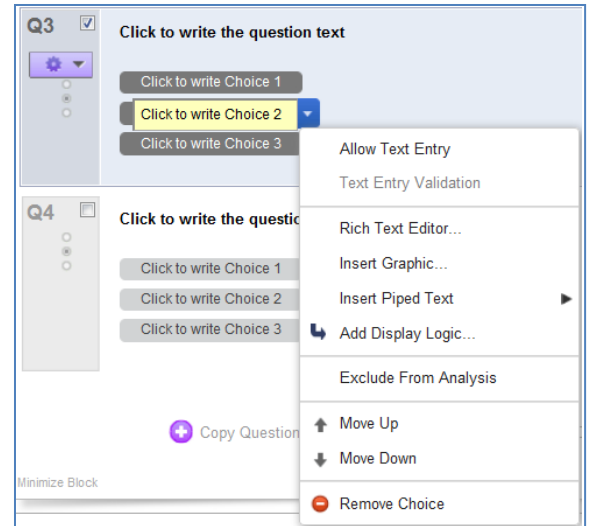
If you delete a question, it is not discarded immediately. Instead, Qualtrics will move it into the **Trash/Unused Questions** area at the bottom of the page. To restore a question, simply click **Restore**. To discard deleted questions, click **Empty Trash**:



## Question Types in Qualtrics

### Multiple Choice

1. Multiple or single answer
  - a. Single answer choices are shown with radio buttons
  - b. Multiple answer choices shown with check boxes
  - c. Drop down menu offers single answer choice
  - d. Select box offers single answer choice
  - e. Multiple select box offers multiple answer choices
2. Arrange choices vertically, horizontally, in columns, drop-down list, or select box
3. Text choice options available when you click on the blue arrow to the right of the text
  - a. Allow Text Entry
  - b. Rich Text Editor
  - c. Insert Graphic
  - d. Exclude from Analysis
4. Validation options vary with the question type



### Matrix Table

Allows a series of identically structured questions to be presented as a group rather than individually

*Bipolar Matrix* (with options only on opposite sides)

How would you rate the Canon Powershot SD400?				
Overpriced				Affordable
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Complicated				Simple
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Out of Fashion				Stylish
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Short Battery Life				Long Battery Life
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Likert Scale Matrix

How would you rate your experience with Customer Support?					
	Very Satisfied	Somewhat Satisfied	Neutral	Somewhat Dissatisfied	Very Dissatisfied
Quality of service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Helpfulness of representatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promptness of response	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(Position of the vertical divider can be changed with a mouse drag left or right)

## Matrix with Text Entry

Please rate each vehicle make on a scale of 1 to 10 (1 = Completely agree, 10 = Completely disagree):				
	Toyota	Ford	Nissan	Chevrolet
I would have confidence in	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Is dependable	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
I love the way they look	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Profile Matrix

Please help us characterize your Internet service provider(s):				
Connection Type:	Fiber Optic <input type="checkbox"/>	Cable <input type="checkbox"/>	DSL <input type="checkbox"/>	Dial-Up <input type="checkbox"/>
Time of Day Used Most:	Morning (6 am - 12 pm) <input type="checkbox"/>	Afternoon (12 pm - 6 pm) <input type="checkbox"/>	Evening (6 pm - 12 am) <input type="checkbox"/>	Graveyard (12 am - 6 am) <input type="checkbox"/>
Geographic Location:	Northeast <input type="checkbox"/>	Midwest <input type="checkbox"/>	South <input type="checkbox"/>	West <input type="checkbox"/>
Satisfaction With Speed Achieved:	Very Fast <input type="checkbox"/>	Fast Enough <input type="checkbox"/>	Neutral <input type="checkbox"/>	Not Fast Enough <input type="checkbox"/>

## Constant Sum Matrix

Out of all the patients prescribed Product M, please allocate 100 points to describe the proportion of these patients by severity for each of delivery device? (Please be sure the columns sum to 100%)		
	With Nebulizer C	With Fine Mist Inhaler P
Mild	<input type="text"/>	<input type="text"/>
Moderate	<input type="text"/>	<input type="text"/>
Severe	<input type="text"/>	<input type="text"/>
Very Severe	<input type="text"/>	<input type="text"/>
<b>Total</b>	<input type="text"/>	<input type="text"/>

## Rank Order Matrix

**Please rank the following attributes for each car from 1 (best) to 4 (worst).**

	Engine Power	Comfort	Handling	Reliability
Honda Civic	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Ford Focus	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Jeep Wrangler	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Lincoln Mercury	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

1. This question type can only be found under the Matrix category, not within the Rank Order type
2. This question type will require validation to ensure respondents enter the correct numbers
3. Respondents cannot continue the survey until they correct their errors in ranking

## Constant Sum




### Draggable Bars

**What percentage of your discretionary money do you spend on the following items?**

	0	10	20	30	40	50	60	70	80	90	100
Entertainment	<input type="text"/>										
Electronics	<input type="text"/>										
Clothes	<input type="text"/>										
Food	<input type="text"/>										

### Constant Sum With or Without Total

**What percentage of your purchases are made with these cards?**

	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Total	<input type="text"/>

## Rank Order

### Drag and Drop Rank Order




**Rank the following movies in order of preference (most preferred item at the top):**

Star Wars	1
Pride and Prejudice	2
True Lies	3
Titanic	4
Lord of the Rings	5

1. The Javascript code for drag and drop ranking does not always work in all browsers – radio button or manual ranking is recommended
2. Instructions for the respondents may be necessary for this question as some may try simply double clicking on the numbers.
3. Once a row is selected it can be dragged and dropped to any location and moved multiple times

### Radio Button Ranking

**Rank the following credit cards, a rank of 1 being your most favorite and 3 being your least favorite.**

	1	2	3
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Manual Ranking

**Rank the following Disney movies in order of preference from 1 to 4 (most preferred) :**

<input type="checkbox"/>	Aladdin - Favorite Character:
<input type="checkbox"/>	Mulan - Favorite Character:
<input type="checkbox"/>	The Little Mermaid - Favorite Character:
<input type="checkbox"/>	Beauty and the Beast - Favorite Character:

1. This question type will require validation to ensure respondents enter the correct numbers
  - a. If respondents enter an invalid number or repeat numbers, they are given a red warning message

- b. Respondents cannot continue the survey until they correct their errors in ranking

### Box Arrangement Ranking

Rank the following movies in order of preference (most preferred item at the top):

Star Wars

Pride and Prejudice

True Lies

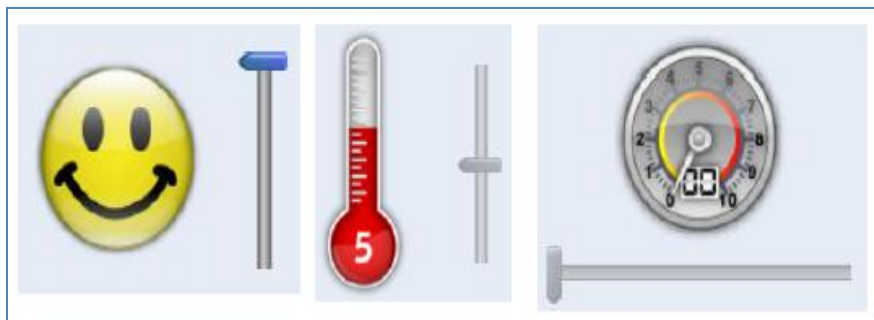
Titanic

Lord of the Rings

- 1) Respondent must first highlight one choice and then move it to the desired location
- 2) Choices can be moved as many times as needed.

### Sliding Scale/Slider

1. Slider questions are similar to Constant Sum questions but allow clicking/dragging visually to select a particular number
2. Sliding Scale questions have rather silly graphics and can be found using “view all question types”
3. Can position text to the side, up or below the scale
4. Numeric scale of this question too limited for many uses



### Side-By-Side Matrix

Several different questions with different scales/responses can be asked for the same categories.

1. Drop-down menu also an option for each portion of the question
2. In the output, the questions are treated separately. You can't see all answers that apply to just one category (i.e. pizza) at once. Rather, you will see how one question was answered for each category.
3. One downside to side-by-side question is the difficulty enforcing any type of validation
4. Choosing validation will require respondents to answer ALL portions of the question
5. This example taken from Qualtrics demonstrates this problem. Validation for this question can't be used because if “Never” is selected in the first question, then the next question isn't even applicable and would have to be left blank. Similarly, requiring comments isn't good practice.

How are your pizza cravings satisfied?							
	How often do you order from these restaurants:			How do you order it?			Comments
	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"/>	<input type="text"/>
Domino's	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Little Caesar's	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Papa John's	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>



## Pick Group and Rank

1. Drag and Drop into Predefined Categories
  - a. Items on the left-hand side can be randomized
  - b. Horizontal arrangement of category boxes can also be used
  - c. In data output file, each item will appear as own variable and show group value (0 or 1) or name
2. Group and Ranking Question
  - a. This question type allows the option of predefined groups or allows respondents to name the groups
  - b. When respondent places an item into the category, the numerical ranking for that item will appear
  - c. In data output file, two columns will appear for each item. One will indicate which group they were moved to; the other will indicate what the rank within the group was. If groups were respondent defined the name that corresponds to the group number will appear in the final columns
  - d. This question does not use drag and drop. An item must be highlighted and then an arrow button clicked to move the item to the desired group. Instructions may be needed.

Please select your car from the following options:

Year

Make

Model

Drag the following animals into their respective groups.

Items	Mammal	Fish
Dog		
Whale		
Trout		
Monkey		

## Drill-Down

1. Question requires downloading a .csv file that has columns with the feasible answers for each drop-down category
2. Selection made from one drop-down list impacts what appears on the next list
3. Drop-down boxes remain grey until a selection is made. Requires respondents to sequentially enter the information
4. NOTE: The “Force Response” validation link that normally appears to the right of questions is not currently visible when a Drill-down question is used. To access that feature, the Advanced Options link will have to be selected from the purple drop-down button to the left of the question.

Please group and rank the following movies into the categories they best represent:

Items	Action	Comedy
Armageddon		
Bye Bye Birdie		
Contact		
Emma		
Ever After		
Field of Dreams		
GATTACA		
Heart & Souls		
Star Wars		
Saving Private Ryan		
War of the Worlds		
You've Got Mail		

Question Choices Answers Options Advanced Preview & Label

You may delete, modify, or insert new choices (one at a time) below: [Go To Simple Mode](#)

ID	Order	Text	GraphicOptions	Text Entry
<input type="checkbox"/>	1	Year	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	2	Make	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3	Model	<input type="checkbox"/>	<input type="checkbox"/>

Delete

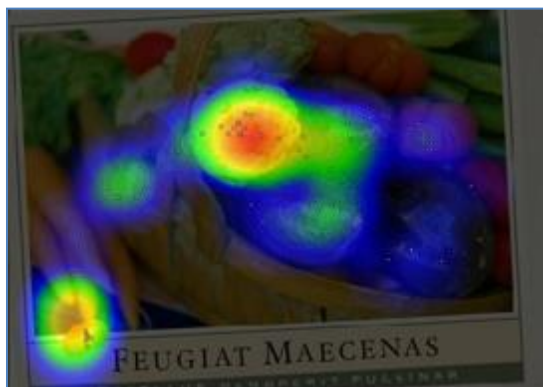
Advanced Function: Choice Options

Text Position: Left

## Graphics Questions

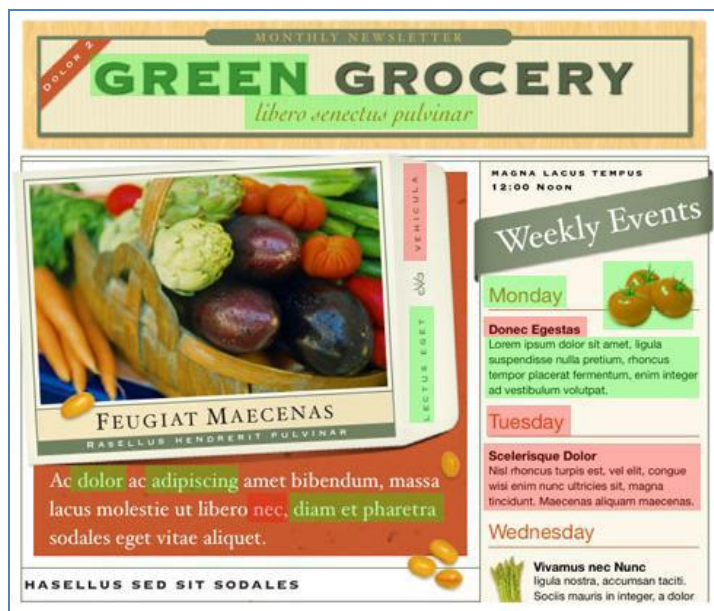
### Heat Map

1. Respondent clicks on location of a picture that grabs the most attention
2. The x/y coordinates of the site selected by a respondent are recorded
3. Heat map can be generated by summing the data points taken from all respondents
4. Redder areas indicate most visually interesting
5. Bluer areas indicate some visual interest



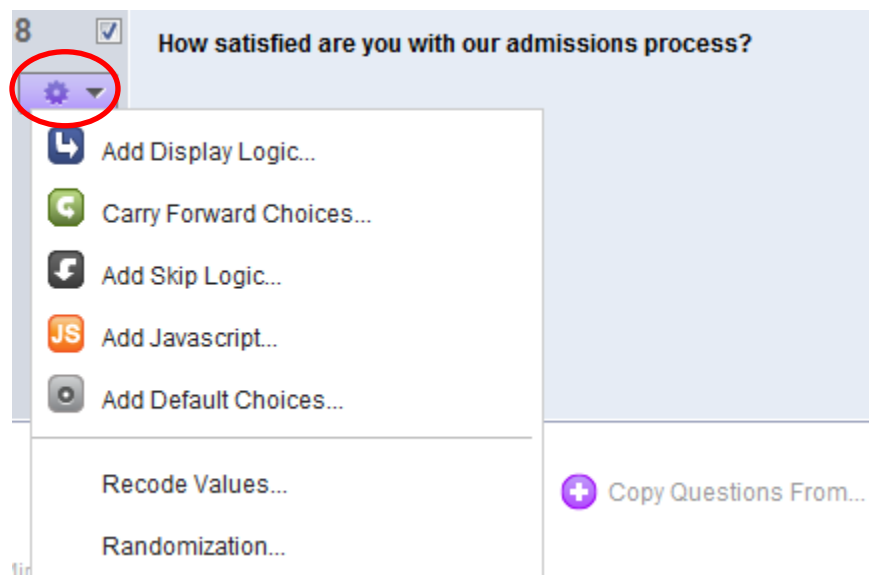
### Hot Spot

1. Key areas of the picture are defined by the experimenter
2. On/Off: Respondent highlights areas of interest
  - a. Green indicates an area of interest
  - b. Clicking a second time will deselect area of interest
3. Like/Dislike: Respondent highlights the areas with red or green overlay
  - a. Red signifies an area the respondent doesn't like
  - b. Green indicates an area that the respondent likes





These Advanced Question Options (and more) can also be found by clicking on the purple icon in each question box:



## Adding Page Breaks

This function creates a marker denoting when survey contents are a part of a new page. The new page(s) will be seen once the survey goes live. To add a page break, select a question by clicking on it. Then, click **Add Page Break**. This will insert a page break below the selected question. In survey edit mode, a page break will look like this:



Like questions, page breaks can be moved up or down using the arrows and added before/after questions, or deleted.

## Carry Forward Choices, Statements, and Scale Points

All choices, selected responses, text entered in answer fields, or scale points can be carried over from one question to the next.

8 How satisfied are you with our admissions process?

☐ Very Dissatisfied

☐ Dissatisfied

☐ Neutral

☐ Satisfied

☐ Very Satisfied

Q26 How satisfied are you with our admissions notifications?

☐ >> Very Dissatisfied

☐ >> Dissatisfied

☐ >> Neutral

☐ >> Satisfied

☐ >> Very Satisfied

The response options from Question 8 were carried forward to Question 26

Carry Forward All Choices from How satisfied are...missions proces: Done

## Add Display Logic

This function allows a question to appear to your respondents only if they answer a previous question in a certain way.

To add Display Logic:

1. Click **Add Display Logic** from the editorial toolbar
2. Select the desired *dependent* question and all the conditions you would like satisfied (again, the selected question will be highlighted light blue).
3. Click Save.

**Display Logic** (What graduate school do you plan on attending?)

Will only display this Question if the following condition is met:

If Question Q24 Do ...school? Yes Is Selected

Close Save

**Q24** ☐ Do you plan to attend graduate school?

☐ Yes  
☐ Maybe  
☐ No

Question 25 will only display if the response from Question 24 is "Yes"

**Display This Question:**  
 If Do you plan to attend graduate school? Yes Is Selected [Edit](#)

**Q25** ☒ What graduate school do you plan on attending?

## Add Skip Logic

This function allows a respondent to skip questions that are not relevant to them. To add Skip Logic:

1. Select a question—the skip logic will be inserted within the selected question.
2. Click on Add Skip Logic (found at the bottom of the editorial tool bar for a selected question)
3. Click Done.

**Q1** ☒ what is your age?

☐ 18-25 ☐ 26-35 ☐ 36-45

If 18-25 is Selected Then Skip to Question 1

Question 1  
 Question 2  
 Question 3  
 End of Block  
 End of Survey

Done

This is how the skip logic appears in the question list. Fill in the logic information to complete the skip logic process. If a specific answer is selected (OR not selected OR displayed OR not displayed), then Qualtrics will skip to a specific question.

**\*\*Display Logic** differs from **Skip Logic** in that **Display Logic** still follows the full survey progression and only displays questions based on previous responses, while **Skip Log** can conceivable move respondents to various portions of the survey.

## Copying Questions

A question and its corresponding responses can be copied in the same survey to reuse again by selecting **Copy Question**.

## Recode Values

This function allows you to rename variables and recode numerical values

1. Assign a value by typing the number in the yellow boxes
  - a. It is always wise to check what current numeric values will be assigned to each choice on a scale
  - b. Sometimes the physical spacing of choices on a scale will result in Qualtrics skipping values (i.e. 1,2,3,6,7,10,12)
2. Rename the variable by typing the name into the pink fields
3. Recode numeric labels in the yellow fields
4. Changes will be reflected in the data file after downloading data

Recode Values		
<input checked="" type="checkbox"/> Recode Values	<input checked="" type="checkbox"/> Variable Naming	
5	VD	Very Dissatisfied
4	D	Dissatisfied
3	N	Neutral
2	S	Satisfied
1	VS	Very Satisfied

## Piping (Smart Text)

Carry over a response or written text from a previous question into the text of another question.

1. Click the Piped Text tab above your question's text

2. Select the desired question/panel field/embedded data/loop and merge field from the menu

3. Specify if a selected choice or entered text response to the question should be used
4. A placeholder similar to the text below will be added in your question's text  
`{q://QID1/ChoiceGroup/SelectedChoices}`
5. A PAGE BREAK MUST BE ADDED SOMEWHERE BETWEEN THE QUESTION PIPED FROM AND THE QUESTION PIPED TO

NOTE: Graphics can be piped into a question as well if they are stored as html code. The html code for the desired graphic would be the text inserted. The codes would be stored as embedded data.

Example: This example uses the selection in Q9 to populate the question text in Q10.

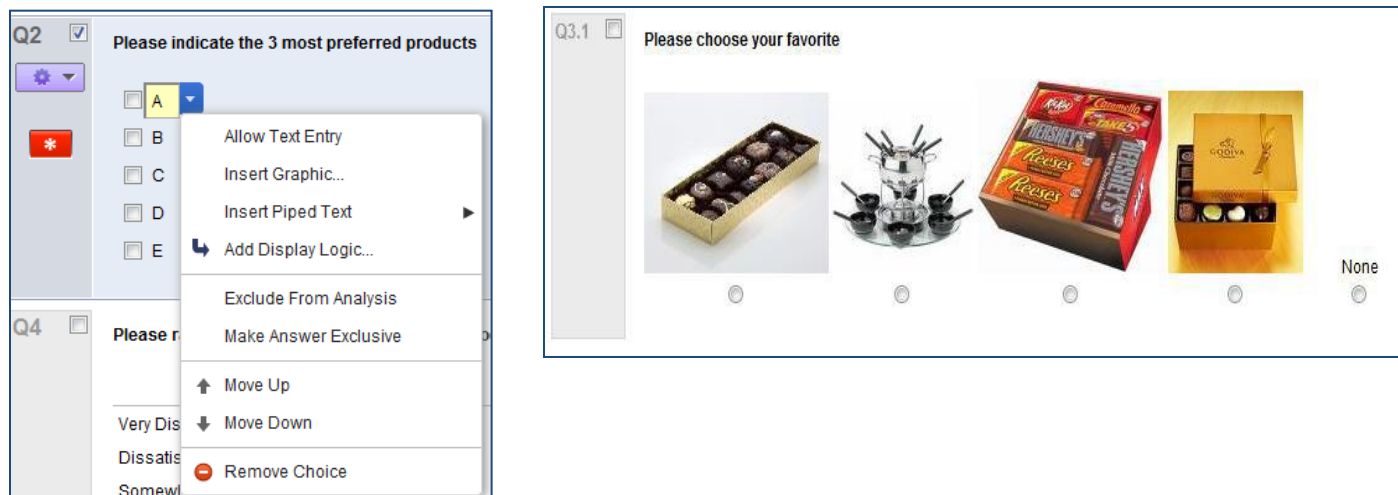
## Choice Randomization

This tool randomizes the order in which the choices appear in a particular question. For question randomization, please refer to the block advanced options. For block randomization, refer to survey flow advanced options. You have the option to randomize all choices, present only a subset of choices, or further customize the randomization using a dedicated subset and/or random selection of a subset.



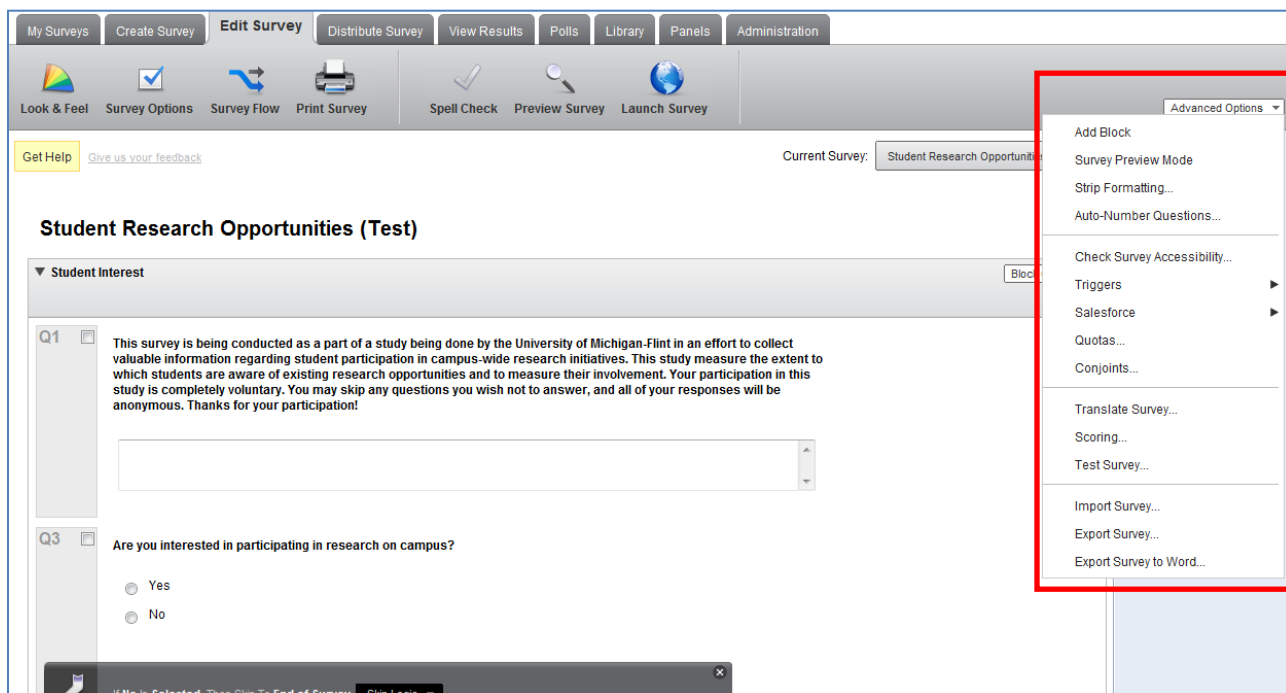
## Adding Graphics as Choices

Choices can include graphics by clicking the blue arrow next to the text of a choice. A menu with “Insert Graphic” will appear.



## Advanced Survey Options

After an advanced option is selected, a popup window will appear that allows you to set the specific parameters.



Advanced Survey Options include:

1. Add Block: Allows you to add a new block into your survey

2. Survey Preview Mode: Allows you to view your survey in compact view
3. Strip Formatting: Removes all text formatting for selected questions; returning them to default settings
4. Auto-Number Questions: Automatically re-numbers your questions. Click on the numbering type to change. Remember that these numbers will not appear to the survey responders.
  - a. Sequential numbering rennumbers the questions from beginning to end starting with 1 (Q1, Q2....)
  - b. Block Numbering rennumbers the questions based on the block. (Block 1: Q1.1, Q1.2; Block 2: Q2.1, Q2.2)
  - c. Internal ID numbering will change the question label to the original question ID generated when you first created the question. (QID1, QID2, etc. – The prefix will remain Q)
  - d. Changing the Prefix allows you to change the prefix to any label you wish to use. Note that SPSS requires variable labels to start with letters, not numbers.
5. Check Survey Accessibility: Determines whether your survey is accessible to people with disabilities.
6. Email Triggers
  - a. A trigger can be used to send an email message to yourself or others each time a survey is completed (default) or each time a certain condition is met during the survey (click “add a condition”)
  - b. In the body of the email, a summary of that particular survey response can also be sent.
  - c. The email trigger is useful when you are using Qualtrics for a reservation form or some other “survey” that will have simple and periodic responses that would be more convenient to receive through email, rather than logging into Qualtrics repeatedly.
  - d. An advantage to using the trigger to send responses through email is that the recipient doesn’t need to know how to use Qualtrics to retrieve results.

The screenshot shows the 'Triggers' section of the Qualtrics interface. A green checkmark icon indicates that the trigger is active. The trigger is titled 'Send An Email On Survey Complete:'. Below the title, there are three input fields: 'To Email Address:', 'Subject:', and 'Message:'. A 'Finish Editing' link is located at the bottom right of the trigger configuration area. Below the trigger configuration area, there is a link to 'Add Another Trigger'. At the bottom of the interface, there are two buttons: 'Close Without Saving' (with a red X icon) and 'Save Triggers' (with a green checkmark icon).

7. Panel Triggers
  - a. A trigger can be used to add a respondent to an existing panel each time a survey is completed (default) or each time a certain condition is met during the survey (click “add a condition”)
  - b. Essential panel fields will be updated; you can also add question responses and other embedded data (add additional fields)

The screenshot shows the 'Triggers' section of the Qualtrics interface. A green checkmark icon indicates that the trigger is active. The trigger is titled 'Add Respondent To Panel On Survey Complete:'. Below the title, there are two dropdown menus: 'Panel' and 'Library'. Below these, there are three rows of input fields: 'First Name', 'Last Name', and 'Email'. Each row has a dropdown menu for the field type and a 'Select Question...' button. A link to 'Add additional fields' is located at the bottom right of the trigger configuration area. Below the trigger configuration area, there is a link to 'Add Another Trigger'. At the bottom of the interface, there are two buttons: 'Close Without Saving' (with a red X icon) and 'Save Triggers' (with a green checkmark icon).

### Advanced Survey Options (continued)

8. Quotas: can be set based on responses to a question or based on embedded data (embedded data must be included in the survey flow).

NOTE: Use caution when using the quota feature to shut down a survey after a certain number of completed responses. If many people have entered the survey simultaneously, there could be problems with the survey shutting down properly and/or too many survey responses will be collected.

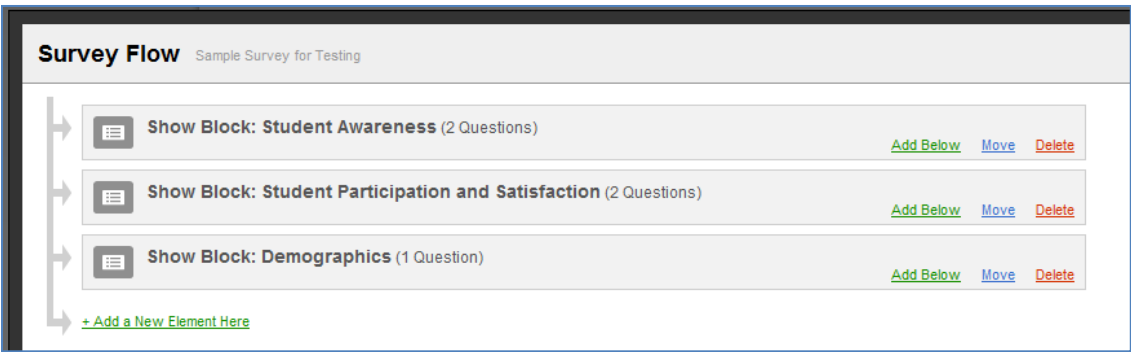
The screenshot shows the 'Quotas' configuration window in Qualtrics. At the top, it states: 'The quota count will be incremented each time the following condition is met:'. Below this, there is a dropdown menu set to 'Quota' with a green 'Has Been Met' indicator. A dropdown menu is open showing 'Question', 'Embedded Data', and 'Quota' (which is highlighted). To the right of the dropdown is a minus sign and a plus sign. Below the dropdown, there is a text input field for 'Quota Name:' with the placeholder text 'Enter The Quota Name Here'. To the right of this field are two radio buttons: 'One quota for all the response sets.' (which is selected) and 'Each response set has its own quota.'. Below the quota name field is a 'Quota Limit:' field set to '100'. A yellow tooltip points to this field with the text: 'This is the number of times the quota condition must occur for the quota to be considered met.'. Below the quota limit is a dropdown menu for 'When the quota has been met, then:' set to 'Do Not Display a Question...'. Below this is a 'Question:' dropdown menu set to 'QID5 Do you have a pet?'. At the bottom right of the main configuration area is a 'Finish Editing' button. Below the main configuration area is a link 'Add Another Quota'. At the very bottom of the window are two buttons: 'Close Without Saving' (with a red X icon) and 'Save Quotas' (with a green checkmark icon).

9. Conjoints: This module creates a series of questions for self-explicated conjoint analysis to determine relative importance of attributes of products, services etc.
10. Translate Survey: This option allows you to create foreign translations of your question and answer choices, either using "Google translate" or by typing your own translations.
11. Scoring: Scoring allows you to set point values for multiple choice, matrix, and text entry questions. Feedback can be displayed after each question and at the end of the survey.
12. Test Survey: The test survey feature allows you to generate responses to your survey before you actually collect data. This allows you to determine how your data will appear. You can determine how many responses you would like to generate, and then go to "View Results" to view how the data looks.
13. Import Survey: Your survey can be imported as an XML (.qsf - Qualtrics Survey Format) or .txt file.
14. Export Survey: Your survey can be exported as an XML (.qsf - Qualtrics Survey Format) file. Please make sure that the correct current survey is selected in the "Current Survey" drop down box.

For more information, visit: <http://www.qualtrics.com/university/advanced-options>

# Survey Blocks

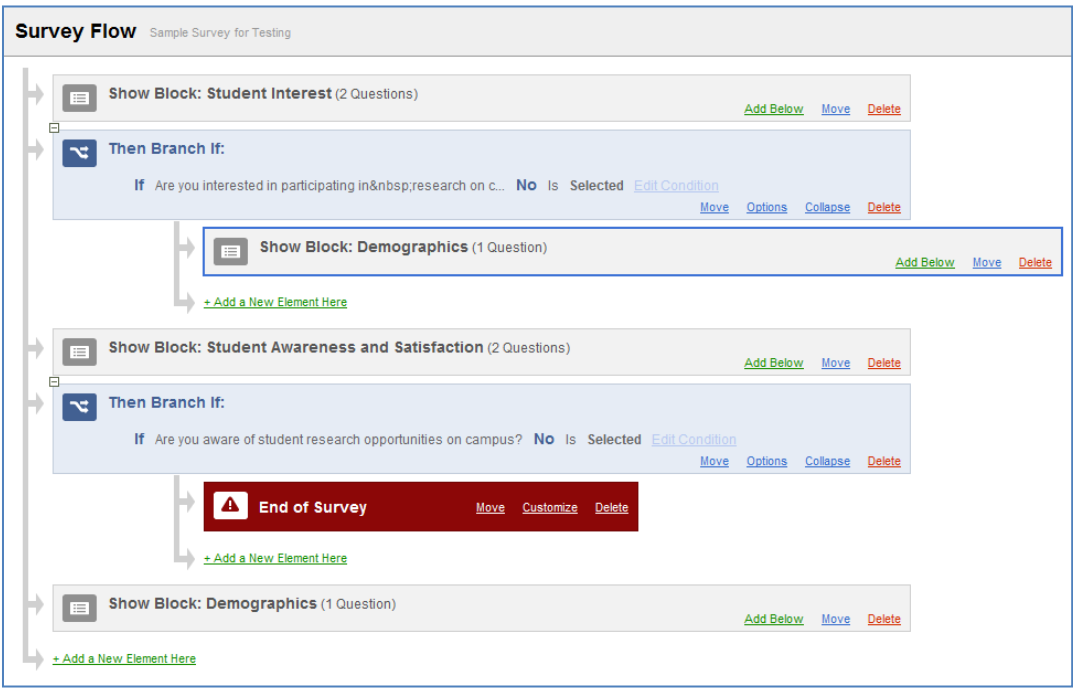
In Qualtrics, both linear and non-linear logic in a survey can be monitored with blocks. By default, Qualtrics enables questions to be added to Default Question Block. A block can house a different section of questions in a survey, and will automatically be separated by page breaks.



The screenshot above shows the survey flow of a questionnaire. In this example, three blocks “Student Interest”, “Student Awareness and Satisfaction”, and “Demographics” has been created. Each block can contain a series of questions.

To create a block, click “Add Block” option under the Advanced Options menu.

Once your blocks are created, you can arrange them according to the designed logic relation using the “Survey Flow” function. Once in the Survey Flow window, use Add a New Element to determine the logic in a survey. Adding a New Element allows you to identify conditions that will trigger particular questions or move you to various blocks. You can also add new logic elements, move them to different locations, or delete them.



In this example, answering “No” to a particular question in the “Student Interest” block will create a skip to the “Demographics” block. Also, answer “No” to a particular question in the “Student Awareness/Satisfaction block will lead to the end of the survey.

## Advanced Block Options

Advance block options include:

1. View Block – will preview only the specific block
2. Collapse Questions – for a more compact view of the block
3. Lock Block – so that no further changes can be made
4. Question Randomization - randomize order of questions in the block
5. Loop and Merge - Series of questions that are identical except for some wording can be presented using the Loop and Merge feature

## Question Randomization

This tool randomizes the order in which the question appear in a particular block. For choice randomization, please refer to the question advanced options. For block randomization, refer to survey flow advanced options. You have the option to do one or more of the following:

1. Change the fixed order of question presentation
2. Randomize all questions
3. Randomize a subset of questions
4. Exclude questions
5. Show only a certain number of questions per page

## Loop and Merge

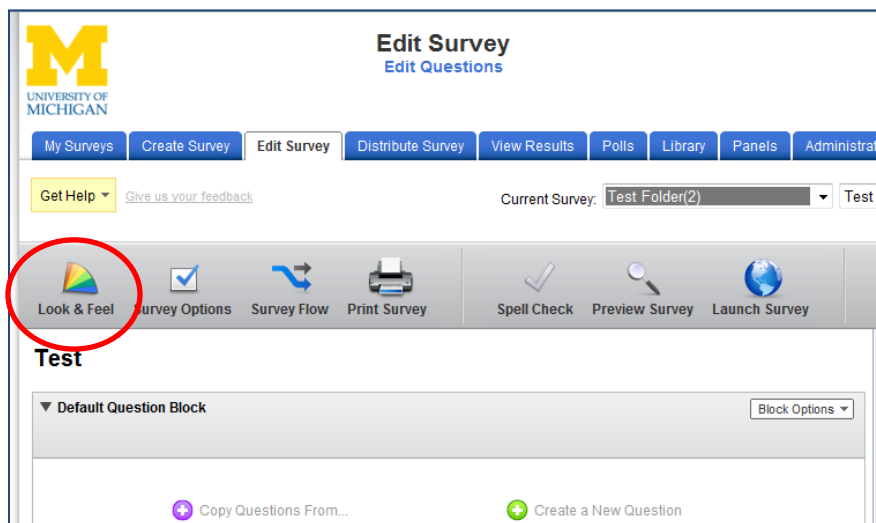
The Loop and Merge allows you to repeat a block based on predefined values, such as embedded data, previous question choices, panel data, etc.

1. Click on “Turn on Loop and Merge”
2. Clicking on “Automatically bring in Field 1 from a Question will populate your to-be-merged values automatically.
3. If you do not populate the fields automatically, you can manually type in the values of the field. For piped text, you must already have the code ready through other sources – there is no option to generate the piped text in this window. Additional levels of the field can be added by clicking the + or – to the left of the fields.

The screenshot shows the 'Loop & Merge' configuration window. At the top, there is a 'Turn Off Loop & Merge' button and a status message: 'Loop & Merge is turned on for this block. Click "Turn Off Loop & Merge" to stop looping.' Below this, a checkbox labeled 'Automatically bring in Field 1 from a question:' is checked, with a dropdown menu labeled 'Select Question...'. Underneath is a table with two columns, 'Field 1' and 'Field 2', and three rows numbered 1, 2, and 3. To the right of the table are minus and plus buttons. At the bottom, there is a checkbox for 'Randomize loop order' and a text field showing 'Present only' followed by 'of total Loops'.

## Customize the Look and Feel of the Survey (Optional)

Once you have created a survey, named it, and assigned to a folder, you can format the interface (the look) of your survey. Click **Look & Feel** to edit the look of your survey



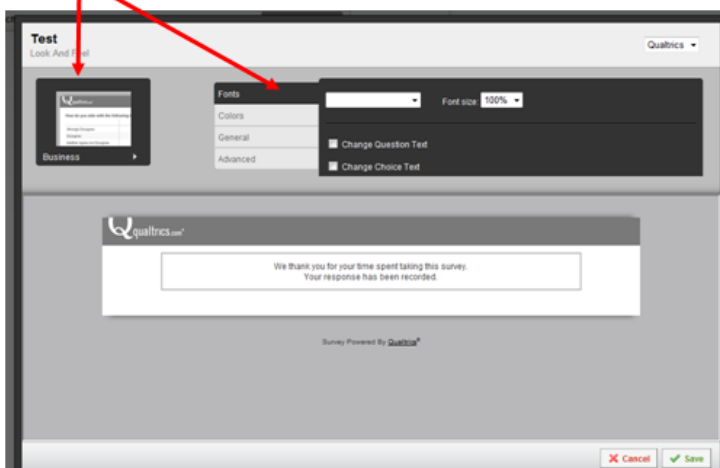
In the **Look & Feel** area of Qualtrics, you can:

- 1) Select a predesigned skin that contains colors and buttons in a wide variety of designs.
- 2) Create a header and footer for your survey that is displayed on every page
- 3) Change the background colors or fonts
- 4) Change the look of the buttons
- 5) Add a progress bar
- 6) Change the number of questions per page
- 7) Highlight or add question separators

To insert a graphic to appear on every page of your survey:

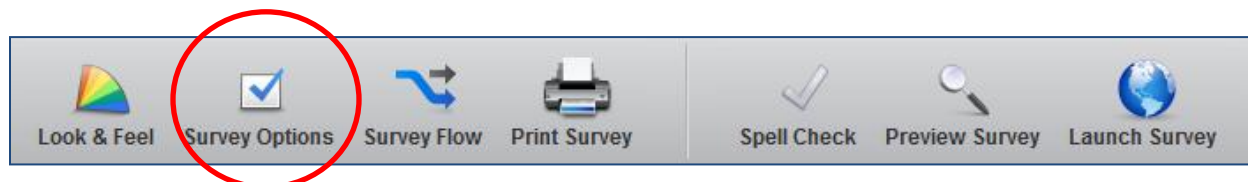
- 1) In the Edit Survey tab, select the Look and Feel rainbow icon at the top of the page.
- 2) Locate the Header box, found in the upper left of this screen. Select the blue text: Edit.
- 3) The second logo from the left allows you to insert a graphic. You can either insert an image from your library or upload a new image. Click Save when you are finished.

Choose from several templates and modify your settings



## Survey Options/Controlling Survey Conduct

Qualtrics allows you to apply certain settings to your survey options. NOTE: In order for any survey option changes to take effect, you must click “Save” at the bottom right corner of the popup window.



## Survey Experience

<b>Survey Experience</b> 	<input checked="" type="checkbox"/> <b>Back Button.</b> Enable respondents to change their responses. <input checked="" type="checkbox"/> <b>Save and Continue.</b> Allow respondents to save and continue later. Survey Language: <span>English</span> <small>The language the survey is written in.</small> <input type="checkbox"/> <b>Show Export Tags.</b> Helpful for survey collaboration. Survey Title: <span>MBA Exit Survey</span> <small>This text will appear in the browser as the window or tab title.</small> <input type="checkbox"/> <b>Use Custom Survey Validation Messages...</b>
------------------------------	--

1. Select **Back Button** to enable survey takers to return to earlier pages in the survey.
2. Select **Save and Continue** to allow users to resume partially completed surveys begun at an earlier time. Save and Continue can be problematic for surveys taken in public areas, since one user could potentially start a survey where a previous user on the same computer left off.
3. Select **Survey Language** to show your survey in various languages. Users must also have their internet browser set to the same language as the default selected here for the survey to appear correctly.
4. Select Show **Export Tags** to export the question numbers in your survey to the survey your respondents and/or other collaborators will see.
5. Survey Title: The text appears as the browser or window title.

## Survey Protection


<b>Survey Protection</b> 	<input checked="" type="radio"/> <b>Open Access.</b> Allow anyone to take this survey. <input type="radio"/> <b>By Invitation Only.</b> Allow only those who receive invitation emails to take the survey (this will reject anonymous links). <input type="checkbox"/> <b>Password Protection.</b> This password must be entered to take this survey: <input type="checkbox"/> <b>Prevent Ballot Box Stuffing.</b> Keep people from taking this survey more than once. <input type="checkbox"/> <b>HTTP Referrer Verification.</b> The user must come from this url to take the survey: <input type="checkbox"/> <b>Prevent Indexing.</b> A tag will be added to the survey to prevent search engines from indexing it. <input checked="" type="radio"/> This survey does not expire. <input type="radio"/> This survey is valid from: <span>2011-03-02</span> to: <span>2011-04-02</span>
------------------------------	---

1. Select **Open Access** to allow anyone to take the survey if a survey is embedded or linked on a web page.




2. Select **By Invitation Only** to limit it to only individuals who receive invitation emails.
3. Check **Password Protection** to require a password (that you create and issue to your respondents) to take the survey. Once the selection is checked, a password entry box will display.
4. Check **Prevent Ballot Box Stuffing** to prevent users to take the survey more than once. Similar to the Save and Continue function, it can be problematic for surveys taken in public areas.
5. Select **HTTP Referrer Verification** to ensure the survey taker comes through a specific URL to take the survey.
6. Check **Prevent Indexing** to ensure that your survey is not searchable in search engines.
7. Select **This survey does not expire** to leave the survey open or **This survey is valid from** to specify a date range for when the survey will be available

## Survey Termination

<b>Survey Termination</b> 	<input checked="" type="radio"/> <b>Default</b> end of survey message. <input type="radio"/> End of survey message from a <b>library</b> ... <input type="radio"/> <b>Redirect to a URL</b> full URL, ex. "http://www.qualtrics.com": <input type="checkbox"/> Send additional thank you <b>email</b> from a <b>library</b> ...
--	--




Choose one of several different messages to show after a survey is complete.

## Inactive Surveys

<b>Inactive Surveys</b> 	<input checked="" type="radio"/> <b>Default</b> inactive survey message. <input type="radio"/> Display inactive survey message from a <b>library</b> ...
--	---

This function controls the kind of message displayed to respondents trying to take an inactive survey.


## Partial Completion

<b>Partial Completion</b> 	How long to wait before partially completed surveys are closed and data is recorded. <b>Please note, the recipient cannot continue taking the survey once their data is recorded:</b> <div> <input type="text" value="After 1 Week"/>  </div>
<b>Response Set</b> 	<div> <input checked="" type="checkbox"/> <b>Do not record partially completed surveys</b> </div> <div> <input type="checkbox"/> <b>After 4 Hours</b>  <input type="checkbox"/> <b>After 24 Hours</b>  <input type="checkbox"/> <b>After 48 Hours</b>  <input type="checkbox"/> <b>After 1 Week</b>  <input type="checkbox"/> <b>After 2 Weeks</b> </div> <div> <input type="button" value="Manage Response Sets"/> </div>

Use the drop-down menu to choose whether or not to allow partially completed surveys, and if so, how long until partially completed surveys are recorded.



## Response Set



Response Set

New responses go into: Default Response Set [Manage Response Sets](#)  
Response sets allow you to place survey responses into different buckets. For example, quarterly or monthly surveys could be collected in different buckets. This allows you to view results of the same survey for different collection periods.

A response set is like a "bucket" where data is collected. By default, all data is collected in the **Default Response Set**. However, you may create other response sets which will split your completed data into discrete groups that can be downloaded, viewed and analyzed separately.

Response sets can differentiate your data in two ways:

- (1) By Date: When you activate a new response set, all future incoming data will be placed in that response set rather than the old one. This will give you data in two sets (for example, a pre-October 15th and a post-October 15th response set).
- (2) By Distribution method: Using the Qualtrics Mailer, you may specify the response set into which the data for a particular mailing will be placed.

## Other Editing Features

### Survey Flow

This is for changing the flow of your survey when you are using multiple question blocks. This is only necessary when doing advanced surveys that require a special type of skip logic, branching, data processing, or block randomization.

The Survey Flow choices include:

What do you want to add? [Cancel](#)

Block

Branch

Embedded Data

Randomizer

Web Service

Authenticator

End of Survey

**Block:** If your survey is separated into blocks, you can customize the order of blocks.

**Branch:** Unique path or question sequence in a survey that respondents will be taken to depending on their answers to previous questions or other data researchers have on them

In this example, respondents who indicated that they were *dissatisfied* with something can be taken to a branch that asks them why they were dissatisfied. *Satisfied* respondents won't see that branch.

Show Block: Default Question Block (23 Questions) [Move](#) [Delete](#)

☐

Then Branch If:

If

Please indicate how satisfied you were with the following... **Very Dissatisfied** is Selected [Edit Condition](#)

Or

Please indicate how satisfied you were with the following... **Dissatisfied** is Selected [Edit Condition](#)

[Move](#) [Options](#) [Collapse](#) [Delete](#)

Show Block: Open End Description (1 Question)

[+ Add A New Element Here](#)

**Embedded Data:** Embedded data is associated with respondents who are part of a panel established in Qualtrics, e.g., name, address, age, gender, etc. This information is known before respondents complete a survey and can be uploaded and stored into panel data (see Panels). Embedded data can also be provided by the survey URL.

To get preexisting panelist data to appear along with a panelist's survey results, a command to include embedded data must be added to the Survey Flow.

This command is also used to save user data from the incoming survey URL to the survey results.

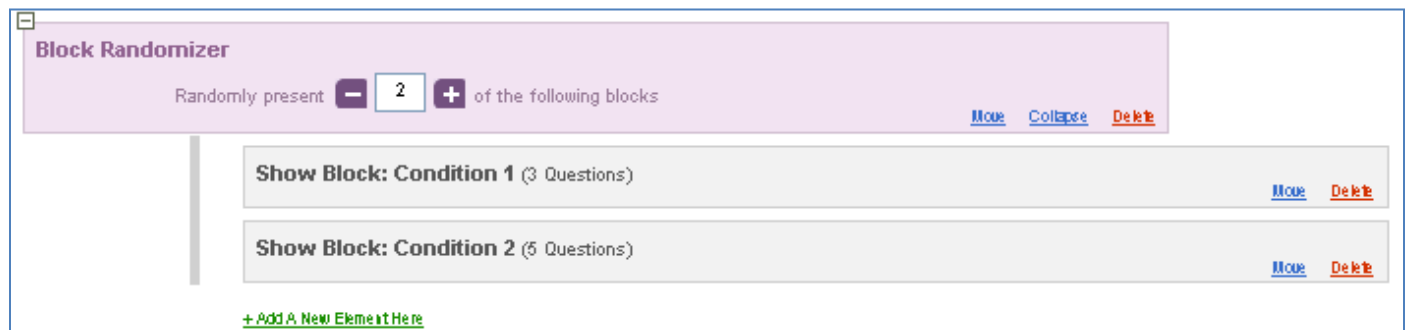
To include embedded data along with survey results:

1. Begin in survey edit mode
2. Select Survey Flow option from top tool bar
3. Click [Add Below](#) to pull up the options that can be added
4. Select Embedded Data

Set a Value Now'. Below the input field is a link 'Add a New Field'. At the bottom right of the dialog are four buttons: 'Add Below', 'Move', 'Add From Panel', and 'Delete'." data-bbox="78 378 925 474"/>

5. Enter the name(s) of each embedded data field you want to add
  - a. These names must match the names of the embedded data created originally in the panel
  - b. It's not necessary to add all field names, only the ones needed.
6. Embedded Data can be added to the survey flow at anytime during data collection or after all data have been collected and/or downloaded
7. After Embedded Data are added in the survey flow, the next data download will include each panelist's embedded data along with all responses to questions.

**Randomizer:** Enables block randomization to assign respondents to conditions or to reduce order effects. In this example, both blocks are presented to respondents in random order:



In this next example, respondents are randomly assigned to a condition:

Block Randomizer

Randomly present 

-

1

+

 of the following blocks

[Move](#) [Collapse](#) [Delete](#)

Show Block: Conjoint 0 (11 Questions)

[Move](#) [Delete](#)

Show Block: Conjoint1 (11 Questions)

[Move](#) [Delete](#)

Show Block: Conjoint 2 (11 Questions)

[Move](#) [Delete](#)

**End of Survey:** Allows premature end to survey if respondents meet the conditions for termination. Customized end-of-survey messages can be used for different groups as they end the survey. Select the link “Customize” to choose which specific end of survey message people on this track will see.

Show Block: Block 1 (1 Question)

!

End of Survey

[Move](#) [Customize](#) [Delete](#)

More details: <http://www.qualtrics.com/university/survey-flow/>

## Print Survey

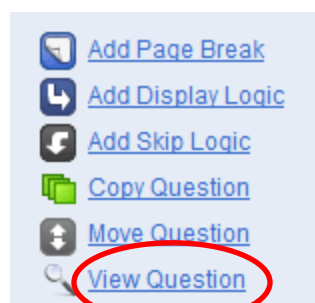
This prints out the survey which can be helpful when proofing. However, the print preview and printout will not appear exactly as it does to respondents. Block names will appear, and all blocks/questions that many respondents will never see will also appear.

## Spell Check

Will spell-check the entire survey, excluding user-specific areas, such as survey, block, and question labels.

## Preview Survey and/or Questions

After you have finished constructing your survey, feel free to **preview** it...

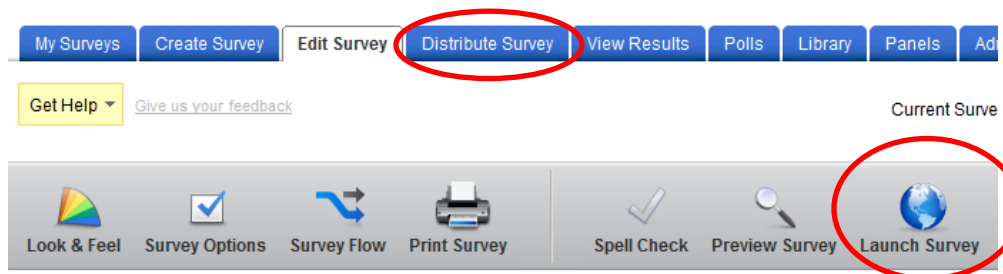


...or preview individual survey questions.

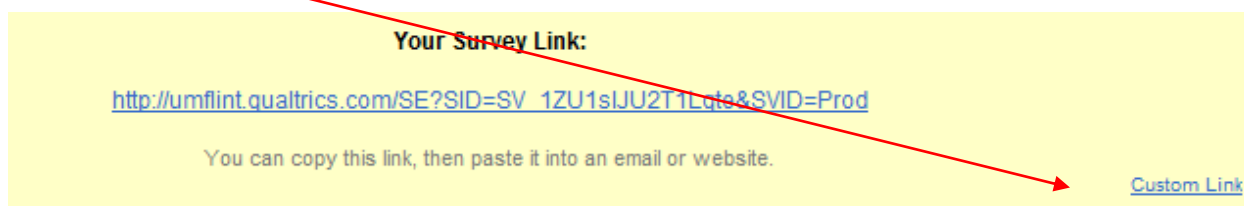
**\*\*NOTE:** When you run through the entire survey in Preview mode, your test responses will be recorded in the results. Before collecting your real survey responses, you will want to delete the test responses. You can clear out test responses by selecting the “Results” icon and deleting the results reports.\*\*

## Distributing a Survey

After your survey is constructed and you are ready to send it out to people, start by clicking either the **Distribute Survey** tab or the **Launch Survey** button.

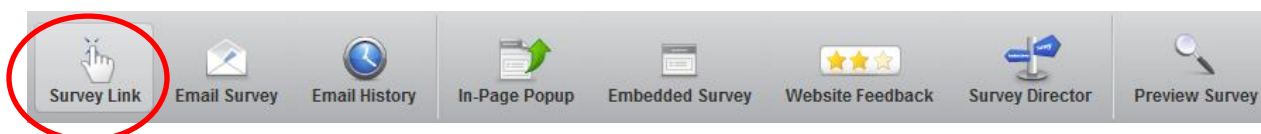


From there, you will also be required to **activate your survey to collect responses** by clicking the link on the next page. Once you do, your survey will be provided a unique link \*Note: You can also customize the link:



Copy and paste the generated HTML code.

The link to the survey can always be accessed under the **Survey Link** button after the survey has been activated.



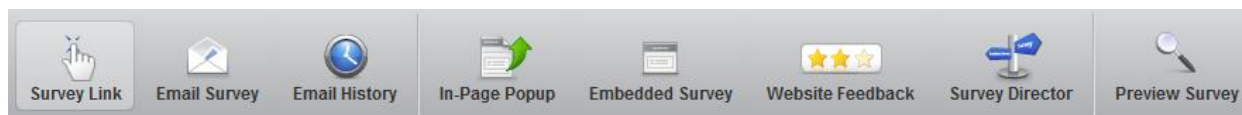
When using the Survey Mailer, individualized links can be sent to respondents. Responses can be tracked. Reminder emails can be sent to panelists who have not yet responded and an email history will document when invitation emails and reminder emails were sent.

- 1) From the Distribute Survey tab, click "Email Survey"
- 2) The Survey Mailer will appear
- 3) Choose your recipient (s)
  - a. Emails can be sent to pre-specified panels or a sample of that panel (see Panels)
  - b. Emails can be sent to individuals from a panel or individual email addresses
- 4) Choose what time/day to send the email
- 5) Create your message or select a message from the library.
  - a. When you create a message, you must label the message and choose a library to save the message to.
- 6) By default, an individual link is generated for each person if surveys are sent through the survey mailer. Respondents can only access and begin the survey once. After that, they will get the message that their "survey responses have been recorded."
- 7) It is possible to allow multiple completions per individual link if you choose "Multiple Completes Per Link" under "advanced options" of the survey mailer

In addition to Survey Mailer, there are several other methods to distribute a survey:

- *Survey Link*: Survey links are easy to set up. And since it can be used as a link in an email or on a Web page, it can be accessed by anyone visiting your Web site resulting in a large sample. However, Qualtrics only tracks the IP address so responses are anonymous, and the potential for ballot-box stuffing is greater than Survey Mailer.
- *Email Survey*: Send Survey is useful for small panel surveys. Each participant receives a unique link to the survey and can only be used once, making the survey very secure.
- *Popup Survey*: In a Popup Survey, the link to the survey appears in a popup window. The link format is identical to Survey Link (above), so the same advantages and disadvantages apply.
- *Embedded Survey*: You can run a survey on a Web site. The link format is identical to Survey Link (above), so the same advantages and disadvantages apply.
- *Website Feedback*: If you have a website, you can use this link to get feedback from your users.
- *Survey Director*: The survey director simplifies survey distribution by using one static link to distribute several different surveys:
  1. Choose which survey a respondent will see based on quotas (e.g., after 500 responses, go to next survey)
  2. Counterbalance surveys (e.g., alternate between survey A and survey B)
  3. Choose which survey is presented based on date, day, or time (e.g., Survey A on Mondays, Survey B on Tuesdays)

More details: <http://www.qualtrics.com/university/distribute-a-survey/>



## Using Panels

In Qualtrics, a panel is a database of information about respondents that has been uploaded into the system. Information from the panel can be saved to the data or be used to populate questions and email invitations.










## Creating Panels

To create a pane:

1. Select the Panel tab
2. Select “ Create New Panel”
3. Assign and name the Panel
4. Add panel members by using
  - a. Simple Form: Copy and Paste (First Name, Last name, Email)
  - b. An Excel File
  - c. Import from a survey already taken

## Using Panels to Monitor Responses

1. Responses can be monitored using the Panel Members icon under the Panels tab
2. Click email address from Panel Member list

Status	Email Address	Name	External Reference	Actions
	<a href="mailto:giantkiller56@hotmail.com">giantkiller56@hotmail.com</a>	Andre1 Louis1		 <a href="#">Edit</a>  <a href="#">History</a>
	<a href="mailto:giantkiller56@gmail.com">giantkiller56@gmail.com</a>	Andre2 Louis2		 <a href="#">Edit</a>  <a href="#">History</a>
	<a href="mailto:giantkiller56@yahoo.com">giantkiller56@yahoo.com</a>	Andre3 Louis3		 <a href="#">Edit</a>  <a href="#">History</a>

3. Edit Panel members’ information and embedded data

**Edit Panel Member - Andre1 Louis1**

First Name

Last Name

Email

External Data Reference

Recipient ID MLRP\_3KOicQs7gGyLyug

Unsubscribe ☐

Language

Add embedded data for this panel member in the box below. Enter one field and its associated value per line and ensure the field name does not contain spaces.

**Embedded Data**  
Middle,C  
Title,Process Manager  
CompanyName,Univeristy of Michigan-Flint  
StreetAddress1,530 French Hall  
StreetAddress2,303 E. Kearsley  
City,Flint  
State,MI

Example:  
State, New York  
City, White Plains  
Sex, Male

4. Click “History” next to the panel member in the list to view emails received and responses made.

# Create a Sample a Panel

You can generate a random sample of individuals from your panel, or choose individuals that fit certain criteria based on embedded data or previous history/sampling information

- 1. Click the “Sample management” icon from the panels tab
- 2. Create a sample name and choose the sample size.
- 3. By default, all panel members are eligible for the sample. If you require specific criteria for an individual to be included in the sample, click “add a sample condition”. Multiple conditions can be specified.

Create Sample

Panel: NewPanel

Sample Name

Max Sample Size

500

[Calculator](#)

Include only panel members matching the following logic:

If

Embedded Data

Embedded Data

Recipient History

Recipient Sample Membership

Is

Equal to

Value

-

+

Generate Sample

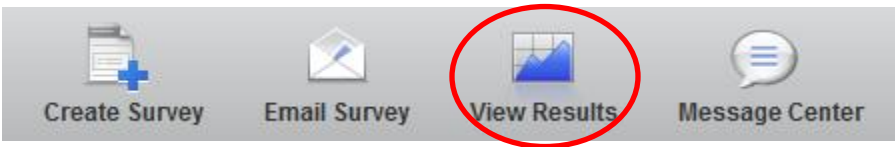
Close



# View Survey Report

To view survey reports:

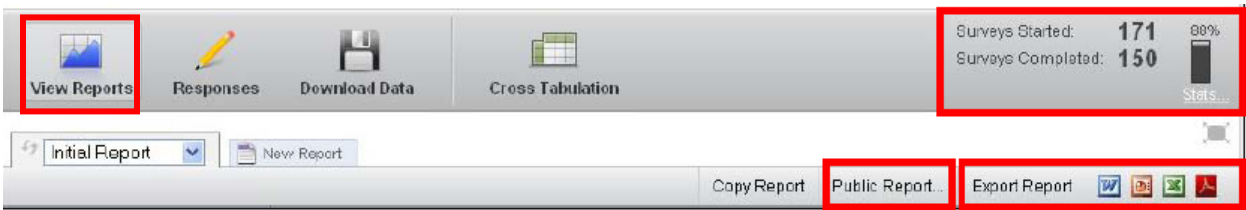
- 1. Select the survey and its corresponding **Results** from the **My Surveys** tab. Click **View Results...**



...or you can click the **Results** under the Task functions at the bottom of the page:

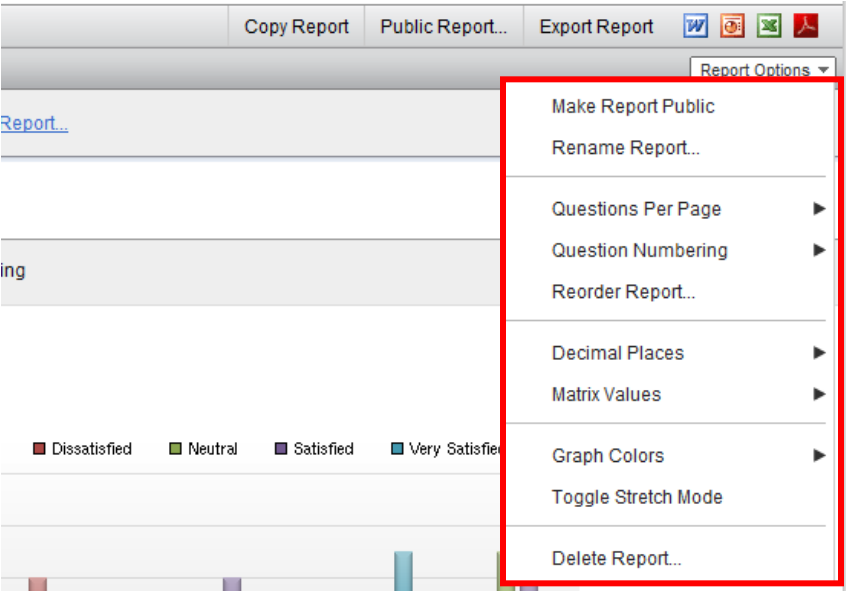


- 2. In the **View Reports** section, the response rate is automatically recorded. Responses are analyzed with basic descriptive statistics and text responses for each question. The report function also allows the survey creator to create charts and tables. All items of the report can be exported into Microsoft Word, PowerPoint, Excel, or Adobe PDF. Reports can also be shared with others by clicking **Public Report**.

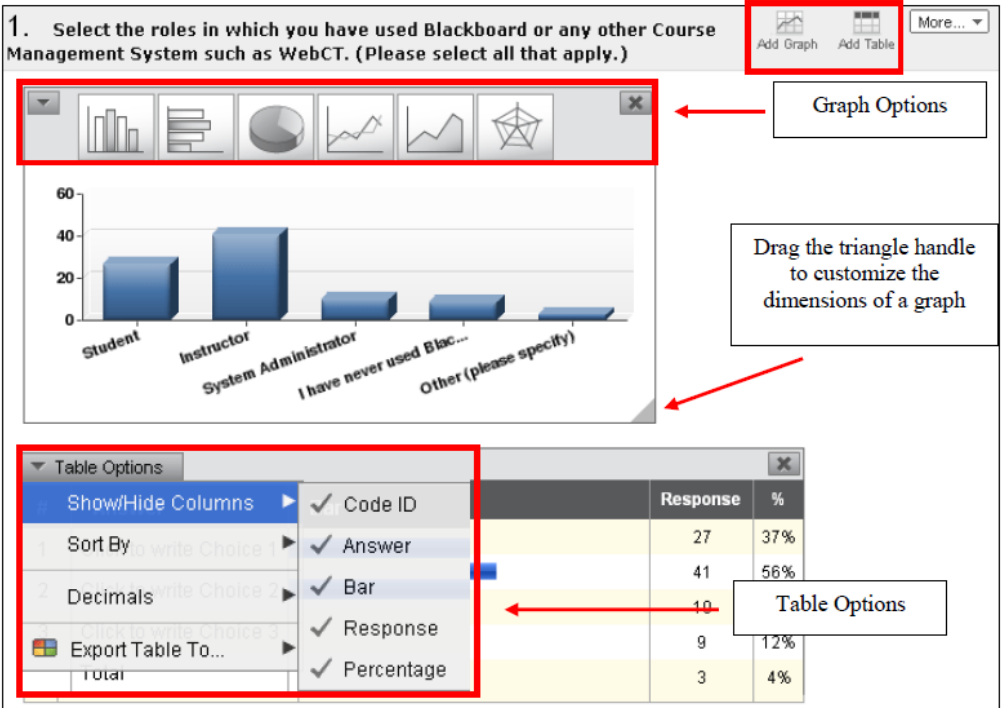


#	Answer		Response	%	Statistic	StatValue
1	<a href="#">Store A</a>	<div></div>	1	20%	Mean	1.80
2	<a href="#">Store B</a>	<div></div>	4	80%	Variance	0.20
	Total		5	100%	Standard Deviation	0.45
					Total Responses	5

3. Modify the display of a report with **Report Options**. For example, the number of questions per page to be displayed in a report can be customized.



4. The report itself includes a table of frequencies, a table of statistics, and graphical representations of the data. As with everything else in Qualtrics, the graphs/tables can be easily modified to match the user's preferences.



Each question is analyzed for a frequency of responses (1<sup>st</sup> table) and for statistics (2<sup>nd</sup> table). To go on to the next question, click **Next page**.

#	Question	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Responses	Mean
1	Baseball	<a href="#">6</a>	<a href="#">5</a>	<a href="#">10</a>	<a href="#">3</a>	<a href="#">7</a>	31	3.00
2	Football	<a href="#">6</a>	<a href="#">8</a>	<a href="#">6</a>	<a href="#">6</a>	<a href="#">5</a>	31	2.87
3	Basketball	<a href="#">7</a>	<a href="#">7</a>	<a href="#">6</a>	<a href="#">8</a>	<a href="#">3</a>	31	2.77
4	Tennis	<a href="#">6</a>	<a href="#">5</a>	<a href="#">6</a>	<a href="#">5</a>	<a href="#">9</a>	31	3.19
5	Volleyball	<a href="#">2</a>	<a href="#">6</a>	<a href="#">9</a>	<a href="#">8</a>	<a href="#">6</a>	31	3.32

Statistic	Baseball	Football	Basketball	Tennis	Volleyball
Mean	3.00	2.87	2.77	3.19	3.32
Variance	2.00	1.92	1.78	2.29	1.43
Standard Deviation	1.41	1.38	1.33	1.51	1.19
Total Responses	31	31	31	31	31

[Next Page](#) ➔

## Responses

The Responses section provides the options of searching the collected data by certain filtering criteria, such as **Response Type** and **Start/End Date**, as well as looking at **Recorded Responses** and **Responses in Progress**. It also enables the survey creator to delete responses from certain respondents (i.e. if a particular response set contains errors). The **Advanced Options** provides choices of deleting

survey previews, imported survey responses, and/or all responses. In addition, Advanced Options includes an **Import Responses** option allows previous data in CSV file form to be uploaded and merged with the current Qualtrics survey data set as well as an option to **Generate Test Responses** (perfect for testing results functions without having real responses to work with).

**\*\*Note:** If you are deleting an entire response set, you will be prompted to confirm the deletion before you can proceed.

**Recorded Responses** | Responses in Progress

Current Filters From Report  
Report: [Initial Report](#)  
Response Set: **Default Response Set**  
Subgroup: -

Response Search Criteria  
Response Type:   
From Date:  to End Date:   
Response Search Criteria  
First Name:  Last Name:   
Email Address:  External Reference:

Select: [All](#) [None](#) [With Selected](#) [View](#) [Delete](#) [Advanced Options](#)

Response ID	Respondent	Start Time	End Time	Duration	Actions
<a href="#">R_bu3pwLswp930hg8</a>	134.128.35.118	03 Jun 2008 08:10 AM	03 Jun 2008 09:27 AM	1h 18m 45s	<input type="button" value="Delete"/>
<a href="#">R_SriWbiaeHqkNk8E</a>	134.128.135.131	03 Jun 2008 11:19 AM	03 Jun 2008 11:20 AM	0m 45s	<input type="button" value="Delete"/>

## Download Data

Qualtrics allows users to download data by into other analytical programs by selected questions, time ranges, and diversified formats.

There are four types of download format:

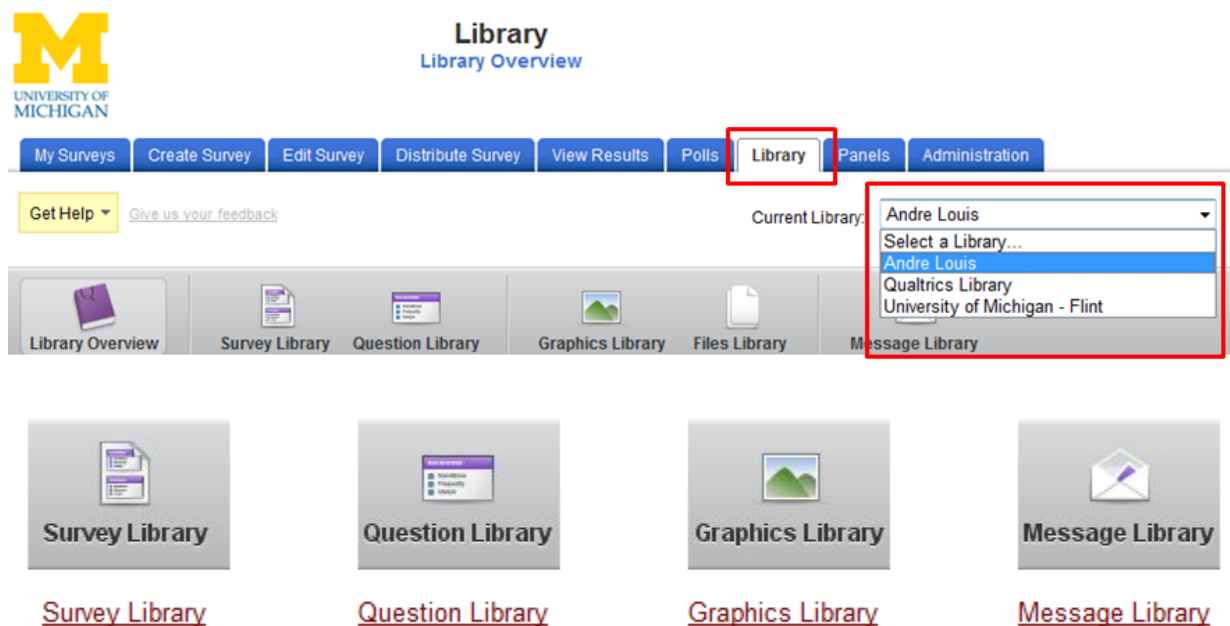
1. CSV – Can be imported into Excel or Access.
2. SPSS – Can be imported into the Statistical Package for the Social Sciences
3. XML – Extensible Markup Language format of the raw data.
4. HTML – Basic structural markup language for use on Web sites.

**\*\*Note:** To select multiple questions from which you can download data, a sequential selection can be done by holding the Shift key on the keyboard while clicking the question. Otherwise, the Ctrl key can be used to do non-sequential selections. On a Mac computer, the sequential selection is the same as on a Windows computer; while non-sequential selection can be done by the combination of holding the Command key (⌘) and clicking the questions.

The screenshot shows the 'Download Data' tab in the Qualtrics interface. It includes sections for 'Questions' (with a list of questions), 'Representation' (radio buttons for 'Answers as Values' and 'Answers as Labels'), 'Export tags' (radio buttons for 'Yes' and 'No'), 'Date range' (From and To date pickers), 'Recode Values' (checkbox for 'Recode Seen but Unanswered Questions as -99'), and 'Format' (dropdown menu with options: CSV, SPSS, XML, HTML). Each format option has a brief description and a download link. A note at the bottom states: 'Note: Downloading the data does not delete the responses from the database. Note: Excel 2003 has a 255 column limit. If you have more than 255 columns you will have to download the data in multiple sets. Excel 2007 has no limit.'

## Qualtrics Libraries

Qualtrics provides several libraries for survey creators to manage the surveys, questions, graphics and messages. The items in the libraries can be pre-designed by Qualtrics, created by individual users, or created by a group of users.



### **Survey Library:**

The Survey Library provides a repository to store the surveys that can be repeatedly used. Using the Current Library dropdown menu, you can toggle among the survey libraries pre-designed by Qualtrics or created by individual users or groups. Surveys in the Survey Library can also be organized by folders. The surveys in the library can be viewed, modified with Options, copied, and deleted.

### **Question Library:**

The Question Library manages questions that can repeatedly used. The layout of the Question Library is the same as the Survey Library. Using the Current Library drop-down menu, you can toggle among the survey libraries pre-designed by Qualtrics or created by individual users or groups. Questions in the Question Library can also be organized by folders. The questions in the library can be viewed, modified with Options, copied, and deleted.

### **Graphics Library:**

The Graphics Library helps to organize images uploaded by Qualtrics, an individual Qualtrics user, and groups of Qualtrics users. The Question Library also enables easy access to insert images in the header, footer, question description and response item in an online questionnaire when creating a Qualtrics survey. Similar to the other libraries, graphics in the Graphics Library can also be organized by folders. The layout of the Graphics Library is the same as both the Survey Library and Question Library with one exception: you must click on a particular image to get the Question Library options, which include editing, copying, deleting, and viewing.

### **Message Library:**

The Message Library enables the user to create an End of Survey Messages, reminders, inactive survey messages, etc.

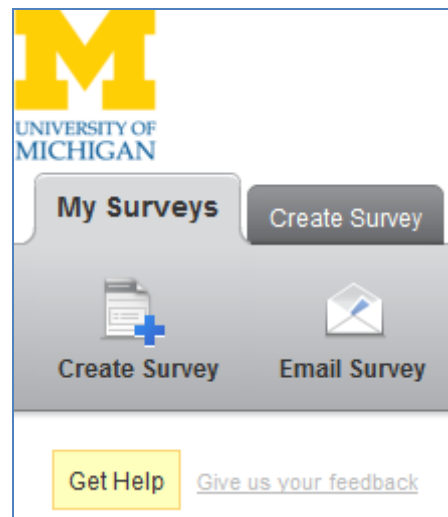
## Qualtrics Support

There are many resources available for Qualtrics users. For more information about Qualtrics and its functions, comprehensive wikis, webinars, and video tutorials can be found in the GET HELP section; located on the **My Surveys** section of Qualtrics (under the Create Survey Icon).

Also, feel free to visit the other websites for additional resources:

**Qualtrics University:** <http://www.qualtrics.com/university/>

**Qualtrics Customer Training and Support:**  
<http://www.qualtrics.com/customer-training-and-support/>



## Contact

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