Qualtrics: The Basics

Video 2 – Creating a Survey – 12:13 minutes

Timestamp	**Content**
00:00	Introduction This video will cover the various survey creation options available in Qualtrics.
00:10	Qualtrics Dashboard After logging in to Qualtrics, you will be routed to the main dashboard where all of your surveys will be house. Most likely, if it is your first time entering Qualtrics, your dashboard will be blank.
00:23	Create a Survey To begin creating a survey, click on the blue “Create new project” button in the top right corner of the screen. This opens a page of preloaded, Qualtrics templates that you can utilize as needed. To create your own survey, click on the “Survey” button towards the top-left of the screen. The survey creation screen gives the option to create a survey from: Blank Project, From a Copy, From Library, and From a File.
00:52	Blank Project Leaving the “Blank Project” option selected creates a project that is blank and completely customizable.
01:00	From a Copy Choosing to create a survey “From a Copy” will allow you to choose from the “Source Project” drop-down box, a survey that is already present in your Qualtrics account. It will create a new editable copy where you can further customize it to fit your needs. The drop-down box allows you to navigate through any folders you have created to organize your surveys to find the survey you wish to copy.
01:16	Naming the Survey You will name the survey at this stage in the box titled “Project Name.” Some general advice about naming is to create a name that communicates to the audience who is sending out the survey and what the survey will be covering. After naming it, click on the blue “Get Started” button on the right side of the screen.
01:49	Survey Creation Dashboard The survey creation dashboard will open. One blank question will already be present when you first create the survey.

01:57 Adding a New Question

To create a new question, either click on the green "+ Create a New Question" button in the center of the screen or click the green plus buttons above and below the question you are working on.

02:12 Reordering Question Numbers

Oftentimes, when adding new questions, the numbering format on the left side of the screen gets out of order. To reorder them sequentially, click on "Tools" at the top of the screen and then click on "Auto-Number Questions." A pop-up box will appear; click on the top option entitled "Sequential Numbering" and the question numbers will reorder themselves.

02:29 Block Organization and Naming

Qualtrics has an organization method called Blocks that is only available to the survey creator. It allows you to easily organize the questions in your survey through named blocks. To name the block, click into the editable title called "Default Question Block" and type in the desired new name for the block. These titles will not be visible to participants. Blocks also serve as page breaks, so at the end of each block, the participants will have to click an "→" arrow in the survey to get to the next set of questions.

03:15 Editing Questions

Click on a question to begin editing it. A box of customizable options will appear on the right side of the screen. There are various options that are not necessarily covered in this video, so please feel free to play around with the options.

03:33 Changing Question Type

The feature at the very top of the list is "Change Question Type." Hovering over each type shows a pop-up of what the question will look like once applied in the survey. There are various question types available to choose from, the most used are:

- Descriptive Text – often used for large pieces of text like consent forms or welcome messages; graphics and pictures can be added as well
- Text Entry – a question type where the participant can fill in their own answer rather than choosing from listed choices
- Multiple Choice
- Matrix Table

04:19 Matrix Tables

A matrix table provides a spot where multiple questions with the same scale can be added as one question. The statements run along the left side of the table and the scale runs across the top.

- Statements can be added or subtracted by clicking on the plus and minus buttons on the far right side of the screen under the heading “Statements.”
- To choose from a Qualtrics provided scale, toggle on the “Automatic Scale Points” checkbox. A large list of all the available scales in Qualtrics will appear. Once you’ve chosen a scale, you can click on the plus and minus buttons under the “Scale Points” heading to have Qualtrics add or subtract logical choices to the scale.
- Use the “Repeat Headers” function to have the scale repeat throughout the matrix table for ease of use for the participant. In the right-hand toolbar, click on the checkbox for “Repeat Headers.” You can then choose to have the scale repeat in the middle of the table, at the end, in both places, or above every statement.

06:01 Multiple-Choice Questions

Multiple-choice questions are the default that populates for a new question in Qualtrics. Increase the number of answer choices by using the plus and minus buttons under “Choices.” The position of the answer choices can be toggled between vertical and horizontal on the right side of the screen under the “Position” section.

06:28 Actions Bar - Page break

The Actions section of the right-side editor section is the same for each question type. One feature available is to create a page break by clicking “Add Page Break;” the page break will be placed after the question you have currently highlighted. A page break creates a prompt in the survey for the participant to have to click a “→” button to move onto the next page of questions. Keep in mind that blocks also create page breaks.

06:57 Preview Function

To check on the progress of your survey, or how any individual feature is working, click on the blue “Preview” button at the top of the screen. A new tab will open that shows exactly how the survey will look to a participant on desktop or mobile devices.

07:39 Actions Bar – Move Question & Copy Question

Questions can be moved or copied throughout the survey by using the “Copy Question” and “Move Question” options in the Actions section of the toolbar. Keep in mind the block organizational structure you have created when moving questions around within the survey.

08:20 OSU Brand Management – OSU Qualtrics Templates

For a survey to go out to the public while affiliated with OSU, it must have the proper OSU branding. Most OSU affiliated Qualtrics accounts already have the OSU branded template available as the default, but if you have any questions about these specifications please reach out to us at assessment@okstate.edu or to Brand Management directly.

08:40 Scoring

Scoring is a way to preset what numerical value will be assigned to each choice a participant makes in the survey. To set up scoring manually, click on the settings wheel (looks like a gear wheel) to the left of any question. Then click on "Scoring." This will open a page with all of the questions in the survey listed out. Either use the "Auto" button at the top of each question section to auto-populate scores for each question or manually enter the intended scores.

09:15 Adding a Back Button

Adding a back button can boost the morale of participants taking the survey as it lets the participant know that they are not locked into the answers they put and can go back at any time. The back button is not automatically available in a newly created survey, so it needs to be manually added. To do so, click on "Survey Options" towards the top of the screen and the "Back Button" checkbox is at the very top of the list. Don't forget to click the green "Save" button at the bottom of the page when making changes.

09:48 Adding a Percentage Tracker

Adding a percentage complete tracker also boosts morale and provides a visual representation of how much longer is left in the survey as participants work their way through. To add this, click on the "Look and Feel" button at the top of the screen then click on the dropdown box below the words "Progress Bar" to select the desired progress bar.

10:20 Alternate Row Coloring

Adding alternate row coloring to a matrix table will help increase visibility and tracking across the table for participants. While still in the Look and Feel menu, click on "Back to Old Editor" in the bottom left-hand corner. Click on the "Colors" tab in the middle of the screen, then click on the box next to "Alternate Row." A color gradient box will pop up and a color can be chosen for the alternating rows. Be sure to keep the color light for the sake of visibility. Then click the green "Save" button in the bottom right corner.

11:09 <u>Collaborate</u>

Collaborating a survey with another Qualtrics user allows for them to edit, activate, and distribute the survey. Return to the Qualtrics dashboard by clicking on the blue “XM” in the top left or the blue “Projects” in the top right of the screen. Click on the three horizontal dots on the far right of the survey in question, then click on “Collaborate.” Begin typing the Qualtrics username or email address of the person you wish to collaborate the survey with; then choose them from the dropdown list. Then click the blue “Add” button. Once they are added, you can toggle their access on and off for features like:

- Edit
- View Reports
- Activate/Deactivate
- Copy
- Distribute

12:07 <u>Closing</u>

The next video will cover survey logic and how that can be used to improve the flow of a survey.