Qualtrics Guide

Qualtrics is a cloud-based platform for creating and distributing web-based surveys. Originally developed for researchers who had advanced surveying needs, Qualtrics is known for advanced features that are still easy to use and understand.

Review Qualtrics help topics for more info on the features. *Refer to help as you work.*

Visit Institutional Research for UIW resources.

Access through Cardinal Apps. Submit a ticket if you do not have the Qualtrics option.

UIW faculty and staff can create **unlimited surveys**.

Review tips for creating effective surveys and use the built-in ExpertReview for real time guidance. ExpertReview makes recommendations on:

- **Methodology**: To elicit the best data from your respondents.
- **Survey Errors**: Checks for common mistakes.
- **Compliance**: Verify WCAG accessibility compliance.
- **Response Quality**: To ensure you have the highest quality data possible.
- **Fraud Detection**: Detect fraudulent responses submitted by bots or surveys taken on behalf of someone else.

The **XM logo** at the top left is where you access all your surveys. Use **+ Add new folde**r to keep them organized.

Surveys are called projects – click the **Create new project** button at the top right to begin. You will then select to start from scratch or select a template option. When you select a tile, a right sidebar will expand with more info, click **Get started** then fill out the name and selection prompts.

Once you have a project created to work on, there are 4 Survey menu options:

Builder: Place to build the survey.

Survey flow: A block-level view to control what respondents see and how they move through the survey.

Look and feel: Select the appearance features.

Survey options: Control general settings.

Surveys have Question Blocks and an End of Survey. Each **block contains the info a user will see on the screen at one time**. Group similar questions into one block or place one question per block to break the survey into manageable chunks.

There are 3 **question types that don't collect user responses**: 1) Text/Graphic, 2) Timing, 3) Meta Info

There are 18 question types to collect user responses – see pg 2 for definitions: **Question Types Guide**

UIW does not have Text Entry Autocomplete or Screen Capture question types.

Click the **Publish** button to publish and activate your completed survey.

Other Tabs

Workflows (previously Actions): **Set up Global and Survey-level tasks,** such as sending an email to a respondent who answers a certain way.

Distributions: Get options to **send the survey out**.

Data & Analysis: Work with your **response data**.

Reports: Ways to **visualize the survey results**.

Questions or other issues? Please contact Dr. Andrew Pagel, Director of Institutional Research and Qualtrics system administrator.

Question Type Definitions

Multiple Choice: Multiple choice questions form the basis of most research. They can be displayed as a traditional list of choices or as a dropdown menu, select box, etc.

Text Entry: Text entry is used to gather open-ended feedback from respondents. These responses can be lengthy essays or short text.

Text / Graphic: Descriptive text questions can be used to add an introduction or instructions to your survey, or display an image, without asking for feedback.

Matrix Table: Matrix table is used to collect multiple pieces of information in one question. This type provides an effective way to condense your survey or to group similar items into one question.

Slider: Sliders let respondents indicate their level of preference with a draggable bar rather than a traditional button or checkbox.

Form Field: Gather standard form information such as name and email address.

Rank Order: Rank order is used to determine each respondent's order of preference for a list of items.

Side by Side: Side by side questions let you ask multiple questions in one condensed table and provides an effective way of shortening your survey while gathering the same amount of data.

Net Promoter Score®: NPS® tracks customer loyalty with one simple, standardized question: "On a scale from 0-10, how likely are you to recommend our company to a friend or colleague?"

Timing: This hidden question is used to time—as well as limit—how long participants spend on a page of the survey. You can use the timing question to keep track of how long participants view one page of your survey. This can be done automatically without requiring any added action from the respondent.

Graphic Slider: This variation of the slider question has respondents use various graphic options, such as changing a frown to a smile or choosing a grade, to indicate their level of preference.

Constant Sum: Constant sum collects numeric data and displays a sum to the respondent. This type is often used for allocation assessments, such as defining how you spend your time in different activities.

File Upload: File upload is used to collect information beyond the survey questions, such as user-uploaded photos or documents.

Pick, Group, and Rank: Pick, group, and rank is used for sorting activities. Respondents place items into groups and have the option to rank the items within the group.

Drill Down: Drill downs help respondents choose from a long list by starting with a broad category and then honing in on the choices that are relevant to the respondent.

Signature: The signature question type presents survey participants with an entry box where they can draw their signature. On a desktop, they can use their mouse, and on a mobile device they can use their finger.

Heat Map: Heat maps let respondents click a specific point on an image. In your data, you can see a heat map that shows which parts of the image were most often clicked. This type is often used for web development (e.g., eye flow analysis) and advertisement testing.

Hot Spot: Hot spots allow respondents to interact with regions of an image. This type is often used in usability testing and concept testing.

Meta Info: Meta info questions report public information about the respondent's computer, such as their browser and operating system. The question requires no respondent action and is completely hidden.

Captcha Verification: Captcha verification is used to ensure that your respondents aren't robots. This question has participants respond to a challenge to verify they are real humans.

Highlight: The highlight question type allows you to present survey participants with an interactive text sample. Participants can select words from the text and evaluate using criteria you choose.