

Qualtrics

Software & Application Support Centre Studio for Teaching and Learning



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Qualtrics account

To get a SMU licensed Qualtrics account, please contact the <u>Software</u> and <u>Application Support Centre</u>.

Email at sas@smu.ca

or drop by at our office (AT107).



Creating New Projects

A typical project consists of a survey, a distribution record, responses, and reports.

1. From the homepage, click the **Create new project** button on the bottom left corner.



2. To start with from a template, scroll through the sections or filter or search to find the type of project you'd like to create.

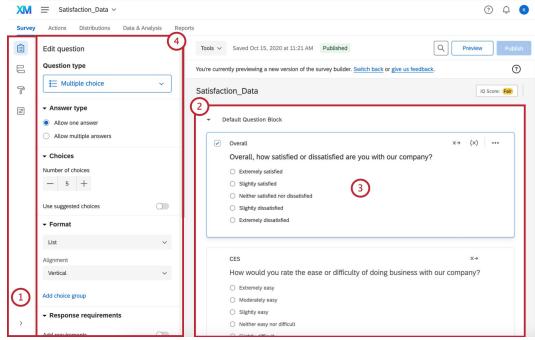
Q Search the catalog	Create a projec	t	Project
 Type ✓ What you're measuring 	Projects from scratch		Survey Begin a survey from scratch or get started with a previous file.
Customers Employees	Survey	♣ Engagement	Best used for Creating ad-hoc surveys
Markets Residents	2 360	(8) Lifecycle	What's included Blank survey
Students See more	Ad Hoc Employee Research	Dashboards	Related links Learn how to create a survey
Department Customer experience Education	Website & App Feedback	Reputation Management	
Human resources	िन्न Frontline Feedback	imported Data	Get started 4

- 3. To start from scratch, select Survey.
- 4. Click Get Started.
- 5. Enter a **Name** for your survey.
- 6. Choose Create a blank survey project.
- 7. Click Create project.

After clicking "Create project," you'll be taken to the Survey tab where you can begin <u>adding questions</u> to your survey.



Survey



- 1. Survey toolbar
- 2. Question block
- 3. Question editing area
- 4. Question editing pane



Block Basics

All survey questions are created, edited, and stored inside blocks. Every survey includes at least one block initially called the Default Question Block.

XM			(š) Ů (k)
Survey	Actions Distributions Data & Analysis Re	ports	
	Edit block	Tools ✓ Saved at 4:08 PM Draft	Q Preview Publish
e	- Block behavior	You're currently previewing a new version of the survey builder. Switch back	or give us feedback.
P	X Question randomization	Web Program CSAT	iQ Score: Great
Ŗ	(*) Loop & merge	- Default Question Block	Add block below (4)
	~ Format	Q3 Thank you for taking the time to fill out the Treac only be used to help us to serve you better.	Duplicate
		Add Block	Preview block View block in survey flow Copy block to library Copy questions to library

- 1. **Block name**: Change at any time by clicking directly on the name and typing a new one.
- 2. Add Block: Lets you create new blocks.
- 3. **Block editing pane**: Appears when you click the block (e.g., white space next to the name) without clicking a question. Make changes to block behavior and formatting. Includes <u>question randomization</u>, <u>loop</u> <u>& merge</u>, and the ability to edit <u>Next / Previous button text</u>.
- <u>Block Options menu</u>: Displays an array of one-click block editing choices.

For simple surveys, placing all of your questions in a single block is just fine. But as surveys become more intricate, organizing questions into multiple blocks allows the application of a sophisticated <u>survey flow</u>,

including <u>branches</u>, <u>randomization</u>, <u>authentication</u>, and <u>embedded data</u>. Visit the <u>Displaying Blocks</u> page to learn how to take full advantage of blocks in building sophisticated survey flows.



Question & Editing Pane Basics

Initially, a default multiple-choice question will be inserted into your "Default Question Block." This ensures that your block has at least one question to start with.

1. To add additional questions to a block, click **Create a New Question**.

XM	Learn to edit surveys ~			(š) Ô 🕜
Survey	Actions Distributions Da	ta & Analysis Reports	S	
	Edit question		Tools V Saved at 3:29 PM Draft	Q Preview Publish
E	Question type		Learn to edit surveys	iQ Score: Great
1 1	✓ Answer type		Default Question Block	
\$	Allow one answer Allow multiple answers	(2)-	Q1 Click to write the question text	
	Choices Number of choices - 3 +		Citick to write Choice 1 Citick to write Choice 2 Citick to write Choice 3	
	Edit multiple		•	Import from library + Add new question 1
	Use suggested choices			
	✓ Format		Add Blo	bock
	List	~	End of Survey	
	Alignment		Line or our rey	

- 2. To add more questions, hover over any existing question and click the plus (+) buttons (either above or below the existing question).
- 3. Click the minus (-) sign to delete a question.
- 4. Move questions around the survey by clicking and dragging them. The question you move will be highlighted in blue, and where it lands is represented by a blue line in the editor.

)	Q1	
	Click to write the question text	
	O Click to write Choice 1	
	O Click to write Choice 2	
	O Click to write Choice 3	
	Q2	Move 1 question
		Move 1 question
	Click to write the question text	Move 1 question
	Click to write the question text	Move 1 question
	Click to write the question text	Move 1 question
	Click to write the question text	Move 1 question
	Click to write the question text Click to write Choice 1 Click to write Choice 2 	Move 1 question
	Click to write the question text Click to write Choice 1 Click to write Choice 2 	Move 1 question



EDITING QUESTION TEXT

You'll write questions, edit question text, and apply text formatting in the question editing area.

Question	Specific	Pages	(Matrix	Slider	etc)	

Rich Content Editor Piped Text			HT	AL View Normal View •••
What is the capital of Urugu	ay?			
 New Uruguay 				
O Montevideo				
O Panama City				
Q15				

- 1. Click in the question text (or answer choice) text boxes to enter or edit your text.
- 2. Click the <u>Piped Text</u> button to grab information from previous questions and blocks (e.g., pulling in someone's name from a Demographics Block to personalize a question).
- 3. Click the <u>Rich Content Editor</u> button to format your text by changing fonts, font sizes, applying bolds, bullets, italics, and more.

Warning: Questions are numbered in the order you create them. If you change the order of your questions by moving a question up or down, the question numbers DO NOT change.

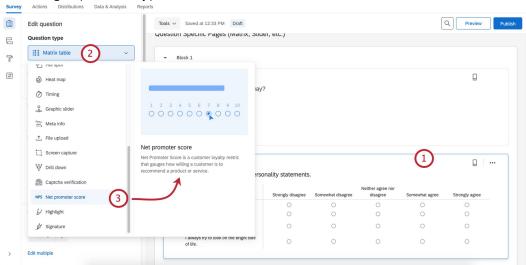
Participants will see your questions in the order they appear the survey builder, regardless of numerical order in which you created the questions. Read the <u>Auto-Number Questions</u> page if you wish to re-number your questions, but that's not typically necessary.



CHANGE QUESTION TYPES

When you first click **Create Project**, a multiple choice question is inserted into your first question block by default. However, you might want to change it to another type or style of question. Use the question editing pane to choose among more than a dozen <u>question types</u> (e.g., Multiple Choice, Rank Order, Heat Map, NPS, Graphic Slider, among many others).

To change question types:



- 1. Open the editing pane by clicking on a question.
- 2. Click the dropdown menu under Question type.
- 3. Hover over an option to get an explanation.
- 4. Click the option to select the question's type.

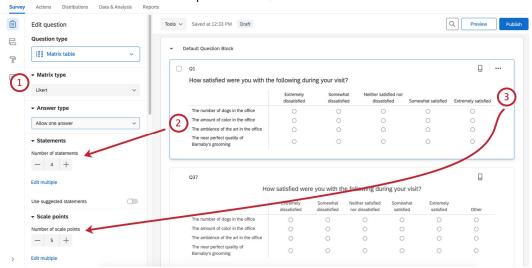


EDITING PANE OPTIONS

You can also use the editing pane to apply the specific options available for each unique question type (e.g., suggested choices, vertical or horizontal positioning, force response, etc.).

Let's demonstrate how these commands work with the <u>matrix table</u> question type:

1. <u>Matrix Type</u>: In this case, choose whether the matrix is formatted as a series of Likert scales, as a bipolar table, or more.



- 2. <u>Statements</u>: Use the + or buttons to increase or decrease the number of possible statements.
- 3. <u>Scale Points</u>: Use the + or buttons to increase or decrease the number of possible scale points.
- 4. **Response requirements:** Click <u>Force response</u> if you want to require a respondent to answer this question before continuing, or add other types of <u>validation</u>.



Add whitespace	Тоо	Is V Saved at 10:59 AM Draft						Q Preview	
Response requirements									
Add requirements	• ·	Default Question Block							
Force response								- 1	
Request response		Q1						* 🛛	•••
		How satisfied were you with the	ne following du	ring your visit	?				
Add validation			Extremely dissatisfied	Somewi			Somewhat satisfied	Extremely satisfied	
Question behavior		The number of dogs in the office	0	0	0		0	0	
🖒 Display logic		The amount of color in the office	0	0	0		0	0	
		The ambience of the art in the office	0	0	0		0	0	
Sarry forward statements		The near perfect quality of Barnaby's grooming	0	0	0		0	0	
→ Carry forward scale points	l								
Skip logic		Q37							
X Statement randomization		Ho	w satisfied wer	re you with th	e following duri	ng your	visit?		
X Scale point randomization			Extremely dissatisfied	Somewhat dissatisfied	Neither satisfied nor dissatisfied	Somewh satisfied		Other	
		The number of dogs in the office	0	0	0	0	0	0	
X→ Recode values		The amount of color in the office	0	0	0	0	0	0	
The second second		The ambience of the art in the office	0	0	0	0	0	0	
Default choices		The near perfect quality of							

- 5. **Question behavior:** Add <u>display</u> or <u>skip</u> logic to the question, and more.
- 6. Actions: Lets you duplicate a question, add a <u>page break</u> after it (to separate pages so the respondent won't see too many questions on a single screen), add a <u>note</u>, and <u>preview</u> questions.

Q1				Duplicate			
How satisfied were you with t	How satisfied were you with the following during your visit?						
	Extremely dissatisfied	Somewhat dissatisfied	Neither satis dissatisf	Preview question			
The number of dogs in the office	0	0	0	Add note			
The amount of color in the office	0	0	0				
The ambience of the art in the office	0	0	0	Delete			
The near perfect quality of Barnaby's grooming	0	0	0	0	0		
Q37		you with the fe	lowing durin	g vour visit?			
Но	ow satisfied were	you with the lo	towing durin	g your visit:			
Но	Extremely dissatisfied	Somewhat Nei	ther satisfied r dissatisfied	Somewhat Extremely satisfied satisfied	Other		

Since there are more than a dozen different question types with a multiplicity of editing pane options for each, you'll want to explore each of these more in the <u>Creating Questions</u> and <u>Question Types</u> support pages.



TO COPY A QUESTION FROM YOUR CURRENT SURVEY

- 1. Select the question.
- 2. Click the dots in the upper-right of the question.
 - Survey Actions Distributions Data & Analysis Reports

Ê	Edit question	Tools V Saved at 1:40 PM Draft	Q Preview Publish
Ę	Question type	You're currently previewing a new version of the survey builder. Switch back or give us feedback.	?
P	€ Multiple choice ~		iQ Score: Great
10 10	Answer type	Default Question Block	
	Choices		2
	Format	✓ Q1 3 Dupl	licate
	Response requirements		page break
	- Question behavior	Very satisfied Prev Satisfied Add	view question
	Skip logic	 Somewhat satisfied Dele 	
	S Display logic	Neutral Somewhat dissatisfied	
	> JavaScript	O Dissatisfied	
	↔ Carry forward choices	02	
	X Choice randomization	On a scale from 0-10, how likely would you be to recommend this product to a	friend or colleague?
حماد	ect Duplicate		

3. Select **Duplicate**.



TO COPY A QUESTION FROM A PREVIOUS SURVEY

1. Click Import from library.

	O Neutral											
	O Somewh	at dissatisfie	ed									
	 Dissatisfi 	ied										
	Q2											
	On a scale	from 0-10	how likely	would you	, be to reco	mmend thi	is product i	to a friend	or colleagu	le?		
			, now allory	would you			o producer		or concuge			
	Not at all lik 0	ely 1	2	3	4	5	6	7	8		remely likely 10	
	0	0	0	0	4	0	0	0	0	0	0	
•								Import	from library	+	Add new questi	ion
										_		

2. Select Copy from existing project.

Survey Workflows Distributions Data & Analysis Results Reports

	Edit question Question type	Tools > Saved Jan 11, 2021 at 11:29 AM Draft Question Library NPS Q Search	×
1 1	► Format	Default Question Block Default Question Block Demographics	>
	Add labels	Q1 Dev	>
	- Response requirements	On a scale from 0-10, how likely are you to recommend HERE] to a friend or colleague?	>
	Add requirements	Not at all likely Employee Experience	>
	Add validation	0 1 2 3 4 5 6 O O O O O O O O Qualtrics Library	
	Question behavior Display logic	Demographics	>
	Skip logic	Add Block	>
>	JavaScript	End of Survey We thank you for your time spent taking	>

Note: You can also add questions from your library, use prebuilt Qualtrics content such as certified questions, or use the search bar to find what you need.



- Workflows Distributions Data & Analysis Results Survey Reports Tools V Saved Jan 11, 2021 at 11:29 AM Draft Ê Edit question ← Copy from Existing Survey X E Question type Q Search by title NPS 7 NPS Net promoter score × My Surveys Default Question Block -**₽** Ad Hoc Employee Research - Format 3 > Apply Add labels \bigcirc Q1 > On a scale from 0-10, how likely are you to recommend 🗄 Apply > - Response requirements HERE] to a friend or colleague? Barnaby High School Remote Learnin... > Add requirements \bigcirc Not at all likely 1 2 3 4 5 6 0 Brand perceptions > 0 0 0 0 0 Add validation \bigcirc Brand trust > - Question behavior 📋 carousel > . Cisplay logic Cart Abandonment > Add Block Skip logic Cart Abandonment & Post Transactio... > End of Survey 💼 ccp 1.0 </>
 > JavaScript >
- 3. Select the survey you want to copy the question(s) from.

4. Use the checkboxes to select the question(s) you would like to copy.

	Edit question Question type			Tools V Saved Jan 11, 2021 at 11:29 AM Draft						Grand perceptions Demographics		
		NPS										
4	☐ Text entry	~										What is your age?
→ T(ext type		*	Default Question Block						⊈⊃ Text Entry		
Sir	ngle line	~		Q1					What is the highest level of school you have completed or the highest degree			
→ R	esponse requirement	S		On a scale from 0-10, how likely are you to recomment HERE] to a friend or colleague?								
Add	requirements			Not at all likely					Which statement best describes your			
	Force response Request response			0 1 2 O O O	2		6 ()	current employment status?				
Add	validation											③ Funnel
Co	ontent type	~			Q29					Category: shoesWhat brands in above category can you think of? Please ente		
Cont	tent type			What is your age?					Form Field			
Nu	umber	~									- (
Mini	mum											5 Insert 2 questions

5. Click Insert question(s).



Survey Toolbar and Navigation Basics

The toolbar along the left manages your survey's design options, security settings, and logic structures (i.e., Survey Flow). The toolbar along the top also lets you preview, publish, and search your survey.

Survey	Actions Distributions Data & Analysis F	eports	
	Edit question	Tools V Saved at 3:43 PM Draft	Preview Publish
8	Question type	Learn to edit surveys	iQ Score: Great
ſ	€ Multiple choice ✓		
3	- Answer type	Default Question Block	
	Allow one answer	Q1	
	 Allow multiple answers 	Click to write the question text	
	- Choices	Click to write Choice 1	
	Number of choices	 Click to write Choice 2 	
	- 3 +	Click to write Choice 3	
	Edit multiple		
		Q2	
	Use suggested choices	Click to write the question text	
	- Format	O Click to write Choice 1	
>	List	Click to write Choice 2	
ĺ.		O Click to write Choice 3	

SURVEY FLOW

The <u>Survey Flow</u> section gives a block-level view of your survey and details the order in which blocks are displayed to your respondents. From here you can customize where respondents go in your survey, what they see, and what they don't see.

You can perform simple tasks like rearranging blocks, or you can add elements like <u>branch logic</u> that directs and personalizes your respondents' survey experience.

By selecting **Add Below** or **Add a New Element Here** in the Survey Flow, you can continue to customize your respondent's path through your survey by adding <u>randomization</u>, <u>authenticators</u>, <u>web services</u>, or new <u>branch logic</u>.





Preview Surveys

Once you have finished building your survey, you can preview it to ensure that everything is working the way you want by clicking **Preview** in the top-right of the Survey tab.

XM	Old Fashioned Burgers an	d Ice Cream	\sim			3 ¢ 🔍
Survey	Actions Distributions Dat	a & Analysis	Report	S		
	Edit question	т	iools ∨	Saved Mar 15, 2021 at 1:59 PM Draft	٩	Preview Publish
B	Question type	0	d Each	nioned Burgers and Ice Cream		iQ Score: Great
þ	(]⊐ Text entry	~	u rasi	ioned Bulgers and ice cream		ity score. Great
٩	- Text type		▼ D	efault Question Block		
	Single line	~		Q1		
	Autocomplete			Please provide feedback about your restaurant experience!		
						6
	Add requirements			02		
	Add validation			How was your movie experience today?		
	- Question behavior					
	ວ Display logic					

In the preview survey mode, you can answer questions and move through the survey the same way your respondents would with a real link. The survey will look the same as in the real link, except you'll have some additional options available at the top to help you test your survey; these options won't appear in the real link.

Restart Survey Place Bookmark Tools ~	∞ Share Preview
What is your favorite animal?	
O Crocodile	What is your favorite animal?
() Tiger	Crocodile
() Giraffe	Giraffe
() Bear	O Bear



Publishing and Distributing a New Survey

When you publish a survey, it'll be a little different if your survey is active and open to responses than if it is new. If your survey is new, the first time you publish will also activate a survey.

1. When you are ready to save your changes and present them to your respondents, click **Publish**.

XM	Arranging Elements in the Survey Flow	v	? ¢ K
Survey	Actions Distributions Data & Analysis	Reports	(1)
	Edit question	Tools ~ Saved at 4:12 PM Draft	Preview Publish
6	Question type	Arranging Elements in the Survey Flow	iQ Score: Great
le N	 Answer type 	- Default Question Block	
	Allow one answer Allow multiple answers	 O1 How satisfied were you with the Snack Shack today? 	
	Choices Number of choices 5 +	Extremely satisfied Somewhat satisfied Neither satisfied nor dissatisfied Somewhat dissatisfied	
	Edit multiple	Extremely dissatisfied	
	Use suggested choices	Import from library	+ Add new question
	Dissatisfied - Satisfied V	Add Block	

2. Read the description and note that **your survey is about to be activated**. This means you will have to press publish after making changes, or else the active survey will look like the last published version.

Ê	Edit question	Tools V Saved at 4:12 PM Draft Q Preview Publish
	Question type	Arranging Elements in the Survey Flow
8	Answer type Allow one answer Allow multiple answers Choices Number of choices 5 + Edit multiple	Publish Survev Publishing will update the version seen by respondents. It can take up to 5 minutes to reflect changes ••• Details ••• User-published version (3) Add a description for your version history ••• User version history ••• View recommendations: 1 •••
	Use suggested choices Dissatisfied - Satisfied	Cancel Publish 4 tibrary + Add new question
	 Reverse order Choice display Show all Show first and last 	Add Block

3. In addition to publishing your survey, you are saving a new version of it. Add a description of the changes you've made. This can be



whatever you like. Dates will automatically be stored with the version, so don't worry about adding date labels.

- 4. Click Publish.
- 5. Your survey has now been activated! On this window is the <u>anonymous link</u>. You can copy this by clicking **Copy link**.

	Q2	
nswer	Survey activated 6	
es 5 +	Your survey has been successfully published and activated. You can distribute it using the anonymous link below. You can also navigate to the Distributions section to view more options. https://dsx.b1-prv.qualtrics.com/jfe/form/SV	
	Okay 7	
hoices	How likely are you to buy the product again?	
atisfied		

- If you plan on recording participant data with responses, emailing the survey through Qualtrics, sending through SMS, or something else, you can see all your distribution options by clicking Go To Distributions. This will bring you to the <u>Distributions tab</u>.
- 7. If you aren't ready to distribute yet, click **Okay** to resume editing your survey.



Distributions Tab

Select the **Distributions** tab to:

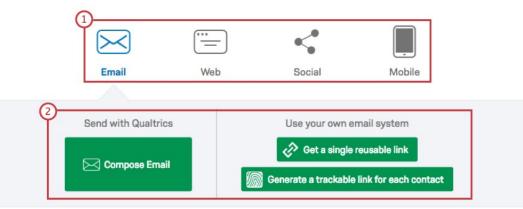
- Activate a new survey
- Start <u>collecting responses</u>
- Monitor your response collection metrics

XM = 2021 Project ~		? Q
Survey Actions Distributions	Data & Analysis Reports	
Pause Response Collection		+ Distribute Survey
Distribution Summary	Recent Responses	
Anonymous Link	3 -	
Emails		
Personal Links	20	

CHANNELS & METHODS

As the Distributions tab first opens, you'll need to pick a distribution channel and a method within that channel to start collecting survey responses.

How do you want to distribute your survey?



- 1. Channels: Choose from Email, Web, Social, or Mobile.
- 2. **Methods**: Pick from the available invitation options (e.g., email invites can be sent via the Qualtrics mailer or through your own email system). The options available here will change depending on the channel you have selected.