THE TOP TEN TIPS FOR USING QUALTRICS AT BYU

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CREATING A SURVEY FROM A COPY AND COLLABORATING ON SURVEYS

To copy a survey so that you can edit it and redistribute it instead of recreating the same survey step by step, simply go to My Surveys and click on the Copy icon to the right of the survey you wish to copy.

After you do this, the following box will appear:

Fill in the Survey name box with what you wish to name the new survey and select where you would like to copy the survey to and what folder you want it to be in. Then click Copy. The new survey should appear as the first survey in My Surveys.

You can then treat this new copied survey as any other. It will be separate from the original and you are free to edit and distribute as you would a new survey.

Collaborating on surveys is easier than you might think. You can share your surveys with others and choose to either allow them to edit or just to look at your survey and/or your results. This makes it easy for professors to allow TAs to sift through survey results or edit surveys easily
without giving the TAs full access to the professor’s account. It also is perfect for groups of people working on the same survey because this feature allows anyone who needs to be able to access the survey. In order to share your survey with another person, the other person needs to have their own Qualtrics account. However, it does not need to be a BYU brand Qualtrics account. You can collaborate with users outside of the BYU brand as well. To start collaborating, simply go to My Surveys and click on the Collaborate icon to the right of the survey you wish to share.

When you click on this, the following box will appear:

Where it says “Type Username or Email,” start typing in the username or the email address on the account of the person you wish to share your survey with. Some options will probably appear in a drop down menu underneath what you are typing.

Select the correct name. If the name does not appear, you probably have the wrong username or email address. Once you have the correct person selected from the drop down menu, click on Add to add the person to the list of collaborators on that survey.
You can continue adding as many collaborators as you wish. They will continue to appear in the same list format. If you add a collaborator by accident or decide later you do not wish to collaborate with them on the survey anymore, you can click the white X in the small red circle next to their name and they will be removed from the list. Once you have your list of collaborators, you can choose what you want them to be able to do by selecting the boxes to the right of the person’s name. For editing and viewing results, if you click on Details, you will be able to select the specific things you want that person to be able to edit or view.

Once you have chosen the allowances you want each collaborator to have, click on Save. The survey will appear in the collaborators’ My Survey lists and will say that they are shared at the top right of each survey.

You and your collaborators can then all work on the survey to the extent that you have chosen to allow them to.
CREATING AND USING PANELS

A panel is a list of people to whom you wish to distribute a survey that you have created in Qualtrics. Panels are very useful tools in distributing surveys, but they are also a source of a lot of confusion for many BYU Qualtrics users. It is a simple process to create and use panels, but there are small things that can go wrong that will cause them to not work correctly. Because of this, it is important that in creating and using panels, you follow the directions given on the website or this tutorial exactly. To begin creating a panel, click on the Panels tab at the top of your Qualtrics home page.

Then click on Create New Panel.

The following box will appear:

Type in a name for your panel and you may choose a destination from the drop down menu if you have already created categories for your panels. Otherwise, simply select Unassigned and then click Create. This will take you to the Panel Members page that you will be able to access in the future by clicking on the panel in your panels list. From here, there are two ways to add panel members: by clicking Import/Update Panel Members or by clicking Add New Panel Members.
To quickly add a few members to your panel, click on Add New Panel Members. The following box will appear:

You can then proceed to fill in the boxes with email addresses and names of people you would like to be in your panel. You can fill in as many names as you would like. When you are finished, click on Save. The names and email addresses you just entered will show up on your list of panel members.

From here, you are free to delete people from the list as well as edit individuals’ information and view their history with your surveys. If you wish to add more people, simply repeat the process by clicking on Add New Panel Members again.

The other way to add panel members to your panel is by clicking on Import/Update Panel Members. Once you click on this, the following box will appear:
From here, you have two options. You can choose to Import/Update From a File or to Import/Update From a Survey. Both can be very useful and efficient tools. Importing or updating panel members from a survey is a good tool if you sent out a survey previously asking for first names, last names, and email addresses of people you want to use to create your new panel and you wish to retrieve that information from the survey for your panel. However, here, we will only explore how to Import/Update From a File. Click on Import/Update From a File. The following box will appear:

Here, you will find very specific instructions for importing a panel from a Microsoft Excel spreadsheet. There is also an example document to the right that you can view and create your panel for importing from. You must have the panel to be uploaded in the correct format before uploading. This is very important. The following is an example of what your spreadsheet should look like:
It is important that the first row is correct (i.e., “FirstName” not “First Name” and “LastName” not “Last Name”) or the panel will not import correctly. Save your spreadsheet somewhere on your computer. Once you have created and saved your panel spreadsheet to be imported, click on Choose File.

From here, locate your saved panel spreadsheet, select it, and click Open.

If you have created the spreadsheet correctly, the box should now look something like this, with the fields you entered showing up in list form:
Here, you can use the drop down menus above each list to adjust if you accidently put the first names is the last name column or made a different but similar error. When you are satisfied with your imported list, click on Import. The following box should appear when the panel members have been imported:

![Import/Update From a File]

Click Close. The new members that you just imported should then appear in your list of panel members along with any other panel members you may have already added. From here, you are free to delete people from the list as well as edit individuals’ information and view their history with your surveys.

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LIBRARIES AND HOW TO USE THEM

Libraries are a great resource for creating surveys. They are a place where you can store questions, graphics, messages, and surveys for later use in future surveys. There are also Qualtrics and BYU libraries that are available for your use. You can view your libraries by clicking on the Library tab from your Qualtrics home page.

You will see an overview of your libraries here and can navigate from this page to the survey, question, graphics, and message libraries. By clicking on one of the different libraries, you will be able to view all of the contents of that library and, by clicking on an item, view that item or copy that item to another library.

In order to use the questions that are available in the libraries in surveys you are creating or editing, click on the survey name in My Surveys.

Once you are in your survey, where you find the option to Copy Questions From... or to Create a New Question, select Copy Question From...

A menu will appear from which you can select a library to choose from and then continue selecting your path to where the material you wish to use is located.
You also have the option to search the libraries to find what you are looking for. Once you have found the question you want to use, select it and click Add 1 Question.

The question will then automatically become embedded in your survey.

If you wish to use a message for email distribution from one of the libraries, click on the survey you wish you distribute, then click on the Distribute Survey tab and then the Email Survey button.
This will take you to a page where you can email the survey out. In order to use a message from one of the libraries, select the bubble next to Message From Library.

When you do this, two drop down menus will appear where you can locate the message you wish you use. Once you select the library and finally the message, it will appear in the message box underneath the drop down menus and you can use it in the emails you send out to those whom you wish to take your survey.

If you wish to use any graphics from the libraries, click on one of the questions in your survey and click the arrow pointing down next to the question type on the right.
A box with all the question types will appear. If you wish to include graphics in your question, you must select a question with “Graphic” in the title.

Once you have selected your question type, click on one answer choice in the question where you want to insert the graphic. Then click on the blue arrow next to the answer choice. Then click on Insert Graphic… from the drop down menu.

The following box will appear:
Select a library from the drop down menu and then select the graphic you wish to insert. The graphic will then appear in your question.

If you wish to use an entire survey, go to the Create Survey tab.

Here, you will see three options. Click on Survey Library.
The Create from Survey Library box will appear:

Use the drop down menus to locate the survey you wish you copy from one of the libraries. Then, give your new survey a name and use the drop down menus to give it a location as well. Then click Create Survey. You will then be taken to the Edit Survey tab with your copied survey ready to be edited. It will also appear in your My Surveys tab along with all your other surveys.

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BASIC SKIP LOGIC

Skip logic allows you to create surveys in which different responses to the same question will take participants to different places in the survey so that they will answer only questions that are relevant to them. It can get complicated, but it is also incredibly useful in creating effective surveys. Here, we will go over some basics of skip logic to get you started. In this example, I have created a question with four different answers.

I have also created four other questions that relate to the answer given in the above question. If someone selects “Blue” as their answer, I want them to answer a question about the color blue. If someone selects “Orange” as their answer, I want them to answer a question about the color orange, and so forth. I don’t want them to have to answer any questions about the colors that they don’t select as their favorites. In order to accomplish this, I will use skip logic. I will start by clicking on Add Skip Logic to the right of the first question that I created.

The skip logic box will then appear at the bottom of the question I have selected. I will now use the drop down boxes to determine what will happen if “Blue” is selected.
I have chosen to send the participant to the question that reads “What is your favorite blue thing?” if they select the answer “Blue” on this question. When I am satisfied with the skip logic I have created, I will click Done. As it is now, the person who selects the answer “Blue” on this question will be sent to the question about the color blue and then they will continue to answer the rest of the questions in the survey. However, I don’t want them to answer the rest of the questions because they are about the other colors. So, I will add skip logic after the question about the color blue as well. First, I will select the question about blue things and then click on Add Skip Logic to the right of it, just as I did with the first question. The skip logic box will then appear at the bottom of the question.

Here, I will select any of the options for an answer to the question and then select Displayed in the second drop down menu because if they are answering this question, all of the options will be displayed. Finally, I will select End of Survey in the third drop down menu and click on Done. This will take the participant the end of the survey after they have answered this question. I will then add the same type of skip logic to the rest of the answers for the first question so that if they answer “Orange,” they will be taken to a question about orange things and then to the end of the survey, and so forth. This is what my first question will look like when I’m done:

This is what my questions about blue, orange, and hot pink things will look like:
The final question, which is about black things, does not need skip logic because it is the last question in the survey and the survey will end after the participant answers it anyway.
I will now preview my survey to make sure that the skip logic works properly by clicking on Preview Survey at the top of the page.

This is just one example of the many different ways in which skip logic can be used to make a survey more intelligent. You can always edit your skip logic and add more as you work on your surveys as well.
READING AND USING SURVEY RESULTS

There are so many options for viewing and using your survey results. You can view them in a simple format, add graphs, export them into various documents, and do many other things as well. The best way to become acquainted with all of the options for reading and using survey results is to view the tutorials presented on the Qualtrics website. The first video is an overview of the View Results tab and the rest of the videos on that page provide more detailed information about the options you have when viewing and using the results. Make it a point to become familiar with these features of Qualtrics as they will be one of the most useful features of the program for you. After all, what good is a survey if you do not know how to use the results?

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SURVEY OPTIONS

Survey Options can be found in the Edit Survey tab.

To access them, simply click on Survey Options at the top of the page.

Once you click on this, the Survey Options box will appear. There are many useful tools in this box that users commonly look for when creating surveys. One of the sections in the box is called Survey Experience and it includes the option to enable respondents to change their responses, the option to allow respondents to save and continue later, forty-three options for the survey language, and the option to show export tags.

Another section in the box is called Survey Protection and it includes the option to allow anyone to take the survey or for it to be by invitation only, the option to make the survey password protected, the option to only allow people to take the survey once, the option to make it so that the user must come from a certain URL to take the survey, and the option to set an expiration date for the survey.
Another section of the box is entitled Survey Termination and Inactive Surveys. This section includes options for what will happen when participants are finished taking the survey, including thank you emails and being redirected to a URL. It also includes options for messages that appear when inactive surveys are accessed.

The last portion of the box is called Partial Completion and Response Set. This contains an option for how long to wait before partially completed surveys are closed and data is recorded. It also contains the option to record response sets from the same survey from different time periods separately so that you don’t have to create a new survey, but can view results for the same survey during different time periods.

Many of the questions we receive about Qualtrics can be answered by sending users to the Survey Options. They are useful and important to be familiar with as you create surveys.
FEATURES OF LOOK AND FEEL

Look and Feel is where you can change the appearance of the actual version of your survey that you will be sending out. You can find it in the Edit Survey tab.

Click on the Look & Feel icon in the top left of the page.

Once you click on this, the Look and Feel box will appear. Here, you can change the colors, the fonts, the buttons, and even the header and footer for your survey. You can also change the theme for your survey, which is important because you don’t want to send out a survey that is not BYU related with BYU’s logo on it. You also want to be sure that you are sending out your survey with the correct department logo and there are two reasons for this: you don’t want to confuse your participants and you also don’t want to do something in another department’s name. This can happen without you realizing it as sometimes your default setting is not what you expected. For this reason, it is important to preview all surveys before you send them out and adjust as needed using the Look and Feel.

To begin, make sure that the drop down menu at the top right of the box has either Qualtrics or BYU selected, depending on which type of theme you wish to use.

In order to find the theme that you want to use for your survey, click on the arrow next to the image of the current icon in the top left of the box.
All of the options for the type of theme you already selected will appear. Select the appropriate theme for your survey from these options.

The new theme you have selected will appear in the preview at the bottom of the box.

You can also edit the fonts, colors, general elements (including the number of questions per page), and advanced elements in the box in the upper right corner of the box. As you make changes, you will be able to see them in the preview at the bottom of the box.
Once you are satisfied with the way your survey looks, click **Save** and your survey will be saved with these new settings. In order to view your survey, click the Preview Survey button near the top of the page.
QUALTRICS POLLS

Qualtrics Polls are another way that you can use Qualtrics to collect valuable information from large numbers of people. Instead of creating an entire survey, you can just create a quick poll that you can add to any website to collect data quickly. To create a poll, click on the Polls tab.

Click on the Create Poll icon near the top of the page.

An editing tool for the poll you have just created will appear on the right of the page.

Here, you can fill in the poll name, the question for the poll, poll choices, the submit button text, and choose whether you want the answer to be a single answer or a multiple answer.
Once you have filled in all of these fields, click on Save Changes. This will take you to the poll look and feel. Here, you can adjust the colors, size, font, button, other general features, and other advanced features on your poll. As you do so, the preview at the top of the box will display the changes. You can click on Save Changes at any time to keep what you have done or click on Discard Changes if you wish to undo the changes you have made.

However, once you have saved your changes, you can’t discard them. When you are happy with the look and feel of your poll, click on Add This Poll to Your Website above the preview.

When you click on this, a box will appear with the code for your poll in it.
From here, copy and paste the code (what is in the red box in the above image) into your webpage’s code where you want the poll to appear. Once you have done this, the poll will appear on your webpage and you will be able to view the results in your Qualtrics account.

If you click on the poll name in your account, the results will appear to the right. You can also access them by clicking on the Results icon to the right of the poll name. Underneath the poll results, you can click the Reset Poll button if you wish to reset your poll. A warning will then appear to make sure you really want to get rid of the old info you collected. To continue, click Reset Poll again.
QUESTION VARIETIES

There are many different types of questions that are available to you for creating your surveys in Qualtrics and it is helpful to know where to find them and get an idea of what types there are. To create a new question, first go to the Edit Survey tab.

From here, click on Create a New Question.

A new question will appear and on the right, there will be all of the question options. From here, click on the arrow pointing downward in the green box under “Change Question Type.”

This will open up the Change Question Type box with the options for question varieties in it. If none of the options here are exactly what you are looking for, don’t forget to click on Show All Question Types at the bottom right of the box.
This will open up a complete list of the question types available to you. As you click on them, examples will appear in the Example Area. Take time to explore all of the options so that you can become familiar with them. This will help as you create surveys in the future because you will know all of the options you have for designing your surveys.

Question types are split into fourteen categories, each with several types included in them that can only be viewed by clicking on Show All Question Types. The categories are:
- Multiple Choice
- Text Entry
- Constant Sum
- Rank Order
- Pick, Group, and Rank
- Hot Spot
- Timing

- Matrix Table
- Text/Graphic
- Slider
- Side by Side
- Drill Down
- Heat Map
- Meta Info Question

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FORCING RESPONSES

Forcing responses is simply the option to either let a participant skip over a question or force them to answer it before moving on. This is a simple feature but it is incredibly important in many instances when certain information is invaluable to the survey. When you are creating or editing a question, you can find the option to validate it to the right of the question.

This will force participants to answer the question before moving on. If a question is a forced response question, a red icon will appear to the left of it. You can also adjust the validation type to the right of the question.