# A Guide for building Qualtrics Surveys

1.

The first step when building your survey is to understand where you can get help.

The Qualtrics University site encompasses a wide range of comprehensive step by step guides. These are searchable on http://qualtrics.com/university/researchsuite/

You can search topics such as how randomise, & how to make likert scales e.t.c.

You can train yourself on the software for free using the Qualtrics training guides. Click the "**Get started now**" button.
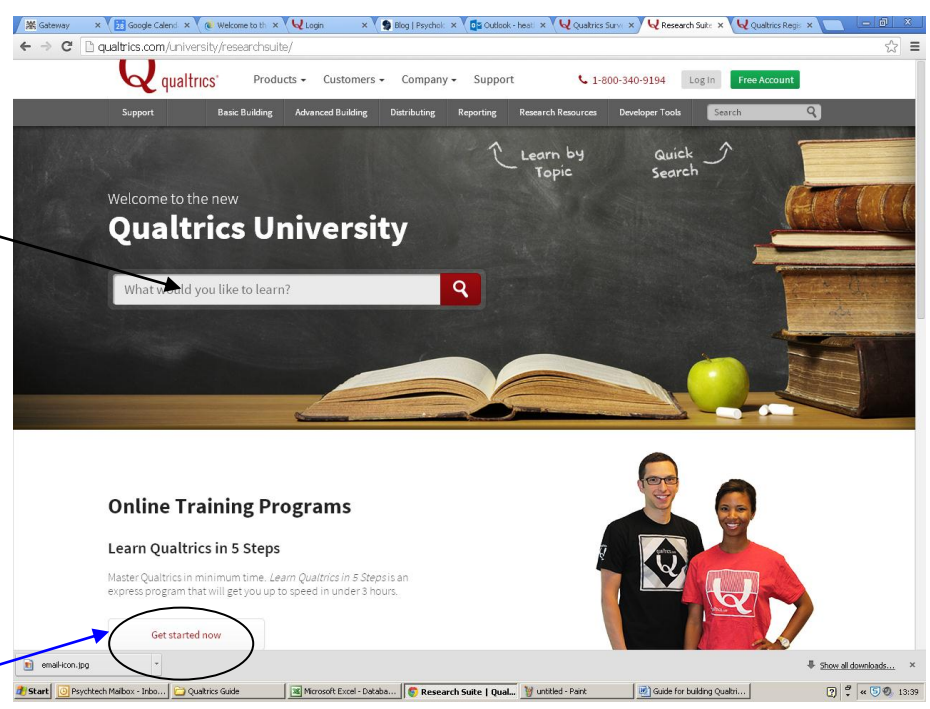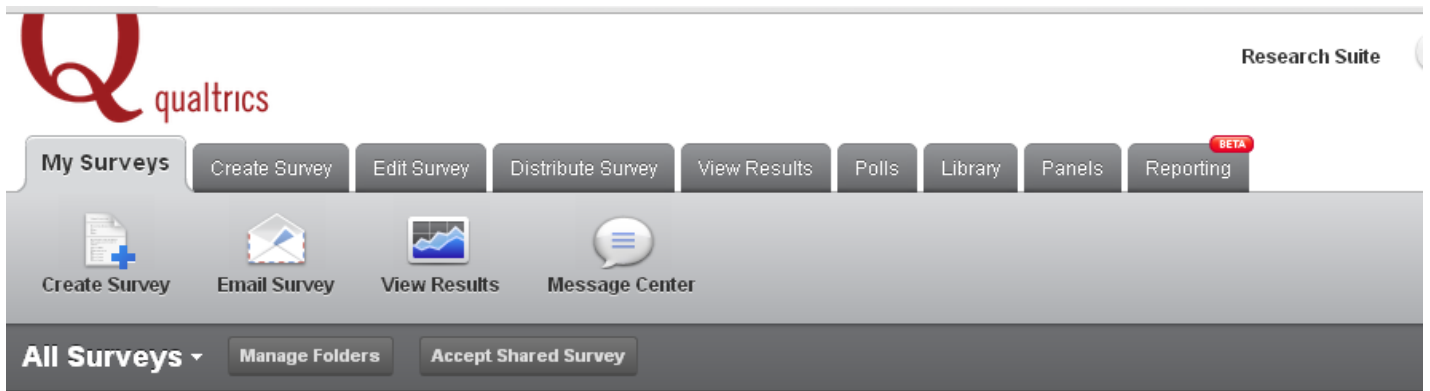
2. <u>Making a new Survey</u>
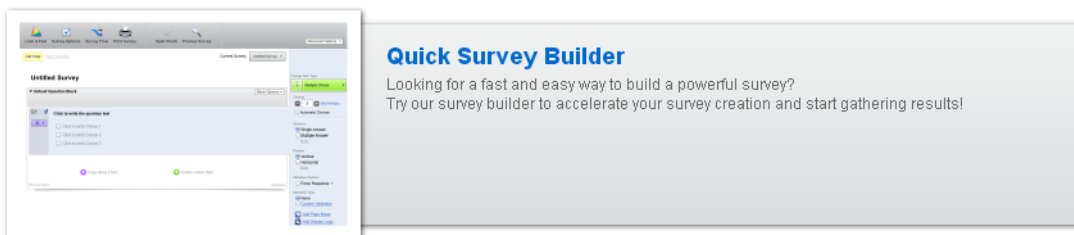
Login to your Qualtrics account via the link below:
www.lincolnpsych.eu.qualtrics.com

A. In the **"My Surveys"** tab, click "Create Survey":

B. On the next page you want to select **"Quick Survey Builder"**:

How would you like to create your survey?

Quick Survey Builder
Looking for a fast and easy way to build a powerful survey?
Try our survey builder to accelerate your survey creation and start gathering results!

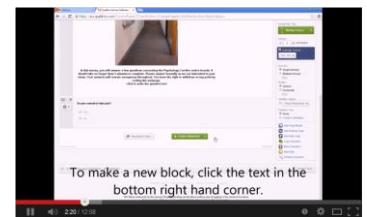**C.** Give your survey a name and click: ☑ **Create Survey** ☺

3. <u>Building your first question!</u>

If you would prefer to watch rather than read how to build questions, please click the link below:

http://www.youtube.com/watch?v=jb4DLv0TugM

Qualtrics uses things called blocks. A block is essentially a series of questions that are grouped together. Blocks are really useful when sectioning your questionnaire into logical parts, for example, a consent form, main body, and debrief. It is good practice to get into the habit of using blocks, as this will become useful later on.
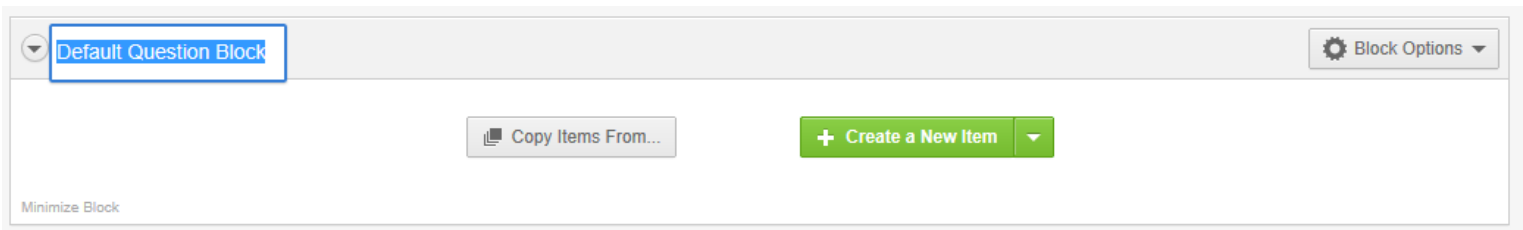

When you make a new survey, you will be presented with a blank block. Rename your block by clicking on the top-left hand corner text box. As this in most cases will be your consent form, it would be logical to name it after this.
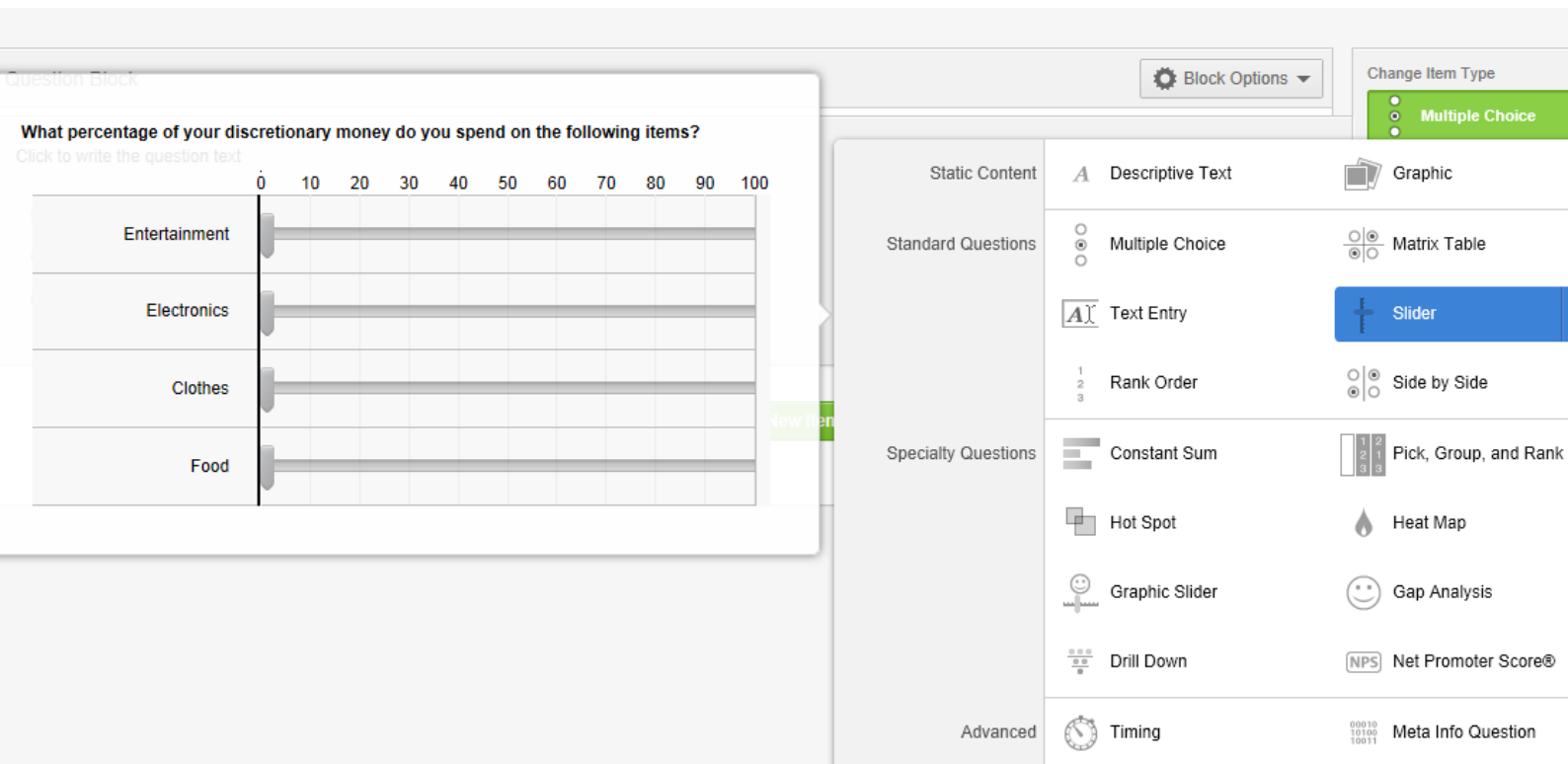
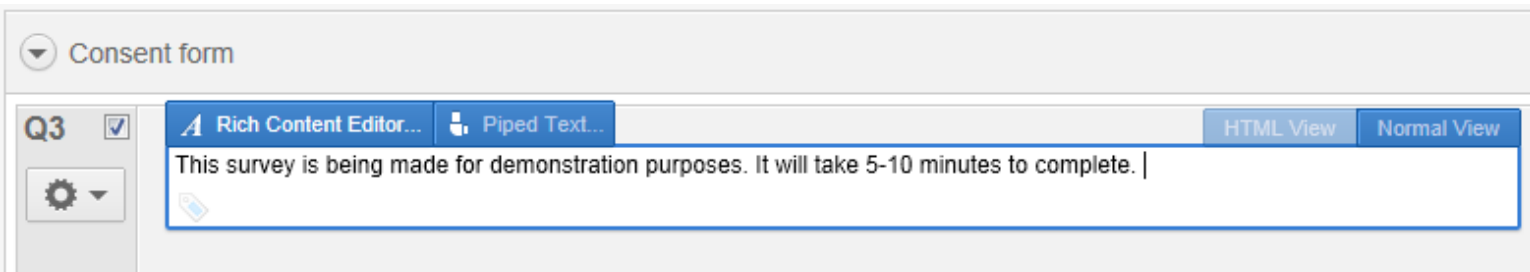To add questions, otherwise known as "Items" to a block, click:

As a default, Qualtrics will generate a multiple choice Item. To change this to another item type, click the green bar on the right hand column. Tip: this bar always displays the currently selected item type.
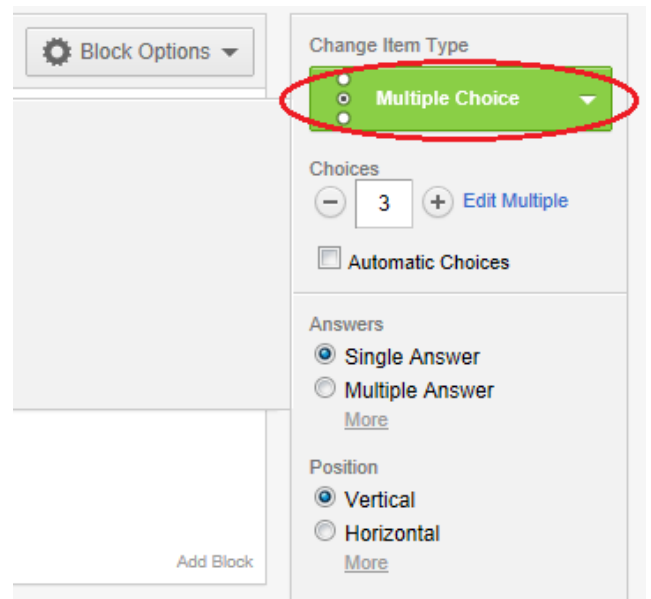
A drop down menu will appear displaying all the types of questions/items you can create. If you hover your mouse over an items' name, it brings up an example on the left for you to preview.

Block Options ▾

Change Item Type

○ **Multiple Choice** ▾

Choices

⊖ 3 ⊕ Edit Multiple

☐ Automatic Choices

Answers
◉ Single Answer
○ Multiple Answer
More

Position
◉ Vertical
○ Horizontal
More

Add Block

Question Block

Block Options ▾   Change Item Type

○ **Multiple Choice**

What percentage of your discretionary money do you spend on the following items?
Click to write the question text

	0	10	20	30	40	50	60	70	80	90	100
Entertainment											
Electronics											
Clothes											
Food											

Static Content	A Descriptive Text	🖼 Graphic	
Standard Questions	○◉○ Multiple Choice	○◉ Matrix Table	
	A𝐼 Text Entry	✛ Slider	
	1 2 3 Rank Order	○◉ Side by Side	
Specialty Questions	▬ Constant Sum	Pick, Group, and Rank	
	⊞ Hot Spot	💧 Heat Map	
	☺ Graphic Slider	☺ Gap Analysis	
	Drill Down	NPS Net Promoter Score®	
Advanced	⏱ Timing	Meta Info Question	

In general, the first item type that you will select is "Descriptive Text". This item is like a mini word processor that lets you type instructions and information relative to your survey. Click "Descriptive text" to change your item into this format.

Consent form

Q3 ☑

A Rich Content Editor... | Piped Text... | HTML View | Normal View

This survey is being made for demonstration purposes. It will take 5-10 minutes to complete. |

Copy Items From... | **+ Create a New Item** ▼

Minimize Block

In the **"Edit Survey"** tab, your descriptive text item will look like this. If you would like to see how an items looks to a participant, you can preview your survey at any time by clicking on the magnifying glass icon.
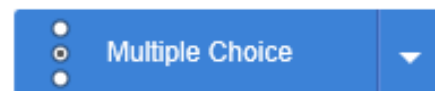
Preview Survey

For more in depth word processing, i.e. changing font size, colour, alignment e.t.c click **"Rich Content Editor."** However, if you are happy with the information you have written, click:

+ Create a New Item ▼

Tip: Qualtrics always auto-saves your questions. You can go back and edit any previously made items at any time.

4. <u>Getting Consent.</u>

A blank multiple choice questionnaire will appear once you have clicked "+ Create a New Item." For the purpose of this demonstration, it can remain in this style. Edit the question accordingly by clicking on the text boxes.

Multiple Choice ▼

Q4 ☑

Do you consent to take part?

⚙ ▾

○ Yes

○ Maybe ▾

○ No

Allow Text Entry

Text Entry Validation

Rich Content Editor

Insert Graphic...

Exclude From Analysis

Insert Piped Text ▶

Add Display Logic...

Assign To Group ▶

⬆ Move Up

⬇ Move Down

⊖ Remove Choice

ms From...

Minimize Block
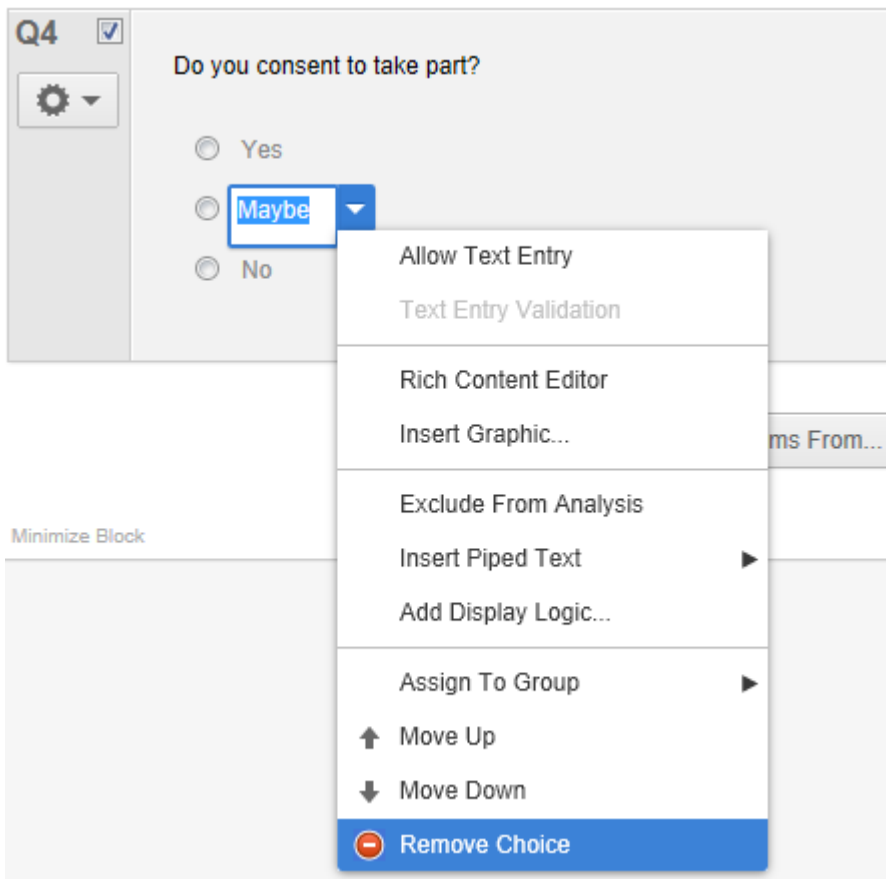
You can remove a response by clicking the down arrow button and selecting "Remove Choice". You should also refer to this drop down menu if you want to add a "Text Entry" option. This allows a participant to type in their own response.

You can also edit a question by referring to the right hand column. Here you will be presented with a list of options, tailored for each question style. For example, you can edit whether a participant can only choose one answer for a question or several. For important questions, such as *"Do you consent to take part?"*, it is advisable to select **"Force Response."** This means that the participant cannot continue until they have responded to this question. To do this, ensure that the relevant tick box has been selected.

As this question is the last in the current section, it is time to make a new block by clicking "Add block" instead of "Create a New Item."

+ Create a New Item ▾

Add Block

Change Item Type

○
◉ **Multiple Choice** ▾
○

Choices

− 3 + Edit Multiple

☑ Automatic Choices

Yes - No ▾

Answers

◉ Single Answer

○ Multiple Answer
More

Position

◉ Vertical

○ Horizontal
More

Validation Options

☑ Force Response ▾

Validation Type

◉ None

○ Custom Validation

🔲 Add Page Break

🔲 Add Display Logic

🔲 Add Skip Logic

🔲 Copy Question

🔲 Move Question

🔲 Add Note

🔍 Preview Question

5. Skip Logic

The Skip Logic function allows a participant to skip questions dependent on how they responded to a previous question. For example, if a participant answers "no" to a consent form, you can tell Qualtrics to take the participant to the "End of Survey" or Debrief.

To do this, click on your consent form and press Skip Logic.

Then edit the drop-down menus' so it reads "If no is selected then skip to End of Survey".

6. <u>The Main Body</u>

When building the main body of your survey, Qualtrics has a variety of question styles to choose from. For example you can make items that mimic likert style questions (Matrix tables/Sliders) to open ended questions (text entry questions suitable for qualitative studies). Qualtrics themselves have made several comprehensive instructions sites concerning how to build each type of question, how these differ in appearance, and how each style looks when exported to excel/SPSS (this is useful when trying to interpret your survey responses). See below:

Descriptive Text and Graphic Questions	http://qualtrics.com/university/researchsuite/basic-building/editing-questions/question-types-guide/descriptive-text-and-graphic/
Multiple Choice	http://qualtrics.com/university/researchsuite/basic-building/editing-questions/question-types-guide/multiple-choice/
Matrix Table	http://qualtrics.com/university/researchsuite/basic-building/editing-questions/question-types-guide/matrix-table/
Text Entry	http://qualtrics.com/university/researchsuite/basic-building/editing-questions/question-types-guide/text-entry/
Slider	http://qualtrics.com/university/researchsuite/basic-building/editing-questions/question-types-guide/slider/
Rank Order	http://qualtrics.com/university/researchsuite/basic-building/editing-questions/question-types-guide/rank-order/
Side by Side	http://qualtrics.com/university/researchsuite/basic-building/editing-questions/question-types-guide/side-by-side/

7. <u>Page Breaks</u>

Adding page breaks into your survey allows you to control how many questions you want to present on one page. If you do not add any page breaks into your survey, your questions will be presented in a long list, making your survey less user friendly to participants. To make a page break, click on the last question that you want to appear on any given page and click:

 Add Page Break

The page break will now appear below.
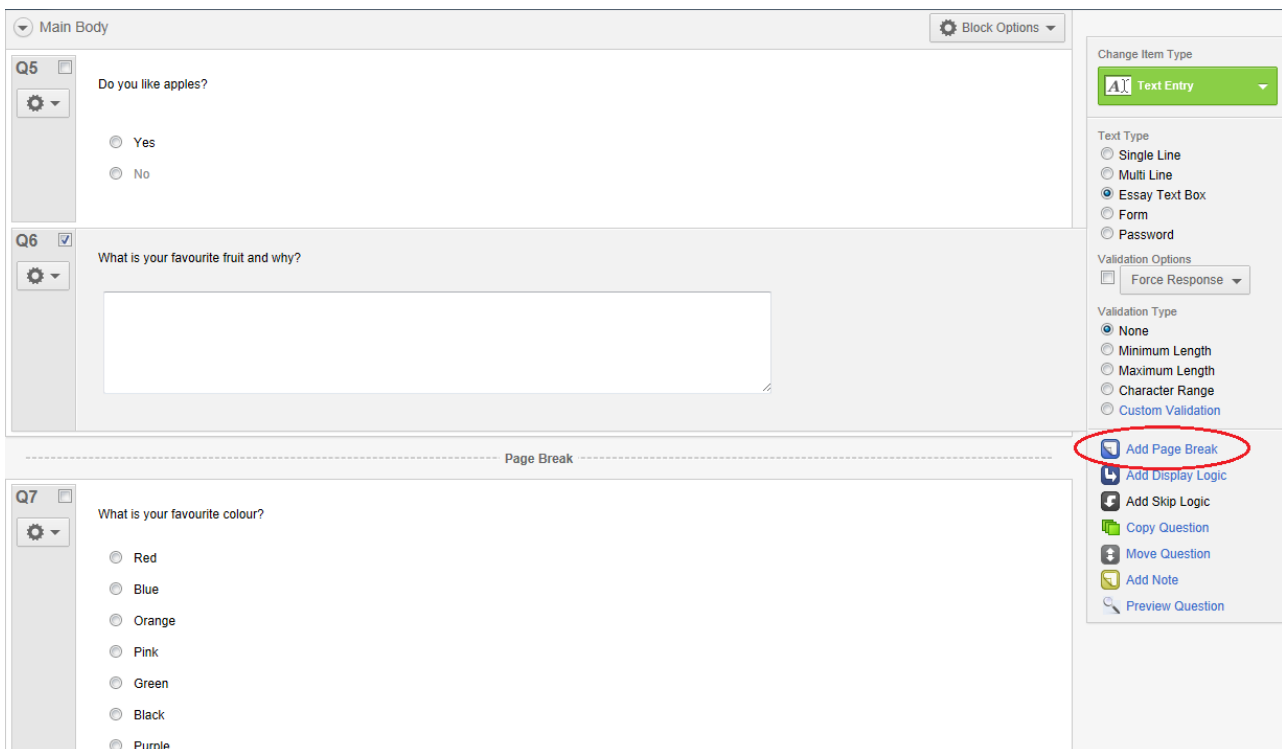
Note: A page break is always automatically added whenever you create a new block.

8. Finalising your survey

Back Buttons

If you would like to add back buttons in your survey click **"Survey Options"** then **Back Button**.
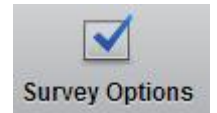
Back Button. Enable respondents to change their responses. | Back Button is not available across branches. More Info

Debriefs

To add a debrief to an **End of Survey Message** click **"Survey Options"** then "**Custom** end of survey message…" Press the drop down menu stating "Load a Saved Message", then hover over "My Library: User Name". Finally click "New message…"
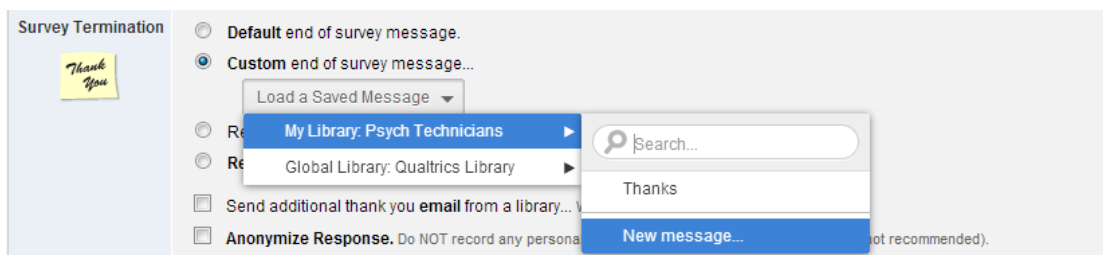
Here you can create your custom end of survey message/ debrief by using the word processing tools. Remember to click **"Save"** once you have done.
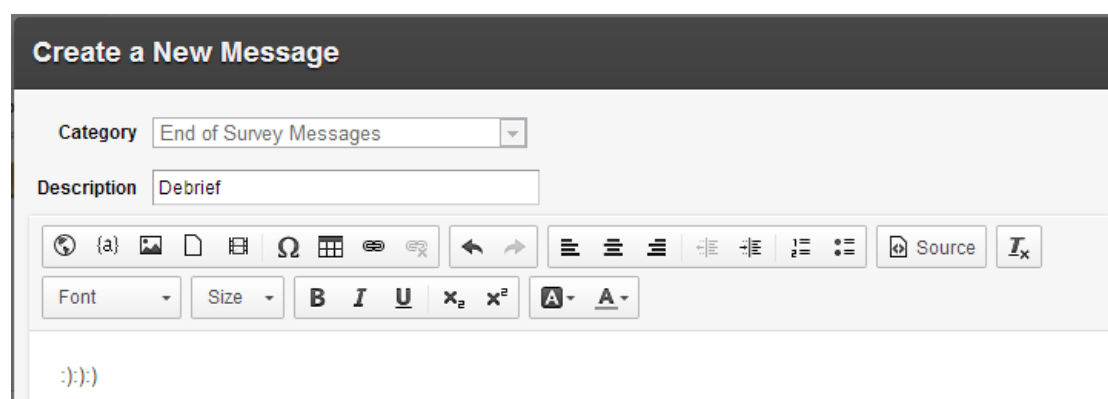
Customising your Survey

You may have already decided that you would like your survey to look a particular way, or, you might be interested in playing around with your surveys appearance. To do this, click

Here you can edit several things:

- Next buttons are the buttons which participants press when they want to move onto the next set of questions. To edit their style click "Next Button Text" and you can create your own by hovering over " My Library: Username" or choose a premade one in "Global Library ; Qualtrics Library".
- You can mirror this to edit your "Back Button Text".
- You can add a *progress bar* by clicking on the drop down menu. This will tell the participant how far they are in the survey.
- You can also list the maximum number of questions you would like on one page.

Previewing your Survey

To see how your survey looks so far to participants, go back onto the **"Edit Survey Tab"** and select **"Preview Survey."**
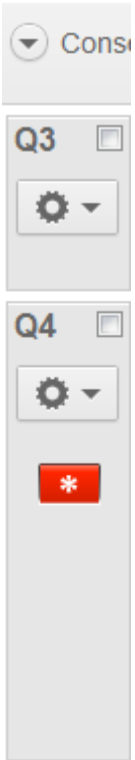
Re-ordering & deleting questions

Sometimes you may decide you want to change the order of your questions. On the **"Edit Survey Tab"** you do this by clicking on a question and pressing the up and down buttons that pop up on the left hand side.

To delete a question, equally you click on a question and press the red-minus button which appears on the right hand side:

This kind of editing can leave your question numbers out of order (see example on the left). To remedy this, click "Advanced options" then "Auto-Number Questions." Continue to press "Sequential Numbering" or "Block Numbering" dependant on your preference. Go back to the **"Edit Survey Tab"** and your questions should now be in order.
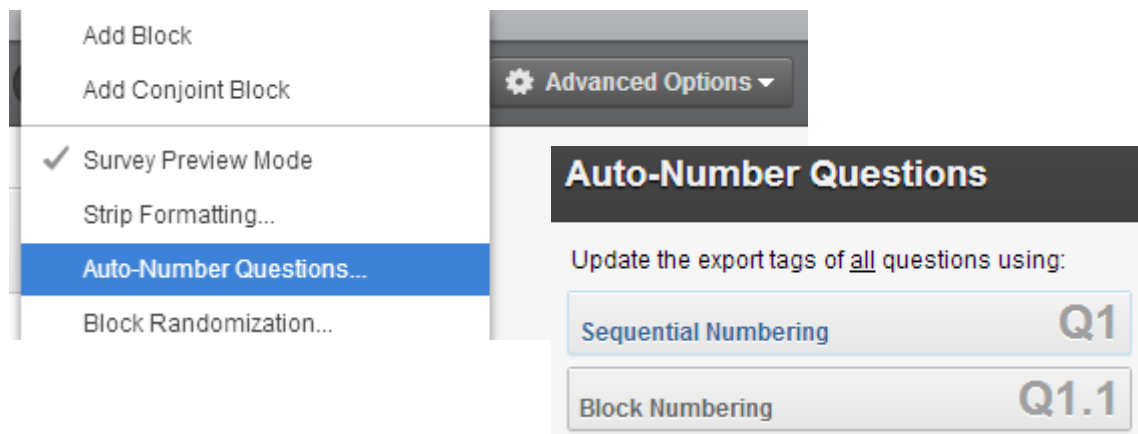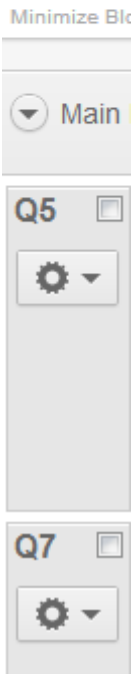
Exporting to Word

To download a Word-Document version of your survey for an appendices section, on the **"Edit Survey Tab" >>** "Advanced options" >> "Export Survey to Word". Make sure all the tick boxes are selected and then click **"Export".**

Deleting Practice Responses

Sometimes, when you preview your survey many times, Qualtrics records these practice responses in your data. To remove these before making your survey live, click on the "**View Results**" tab. You can see on the right hand side how many responses it has recorded from your previews.
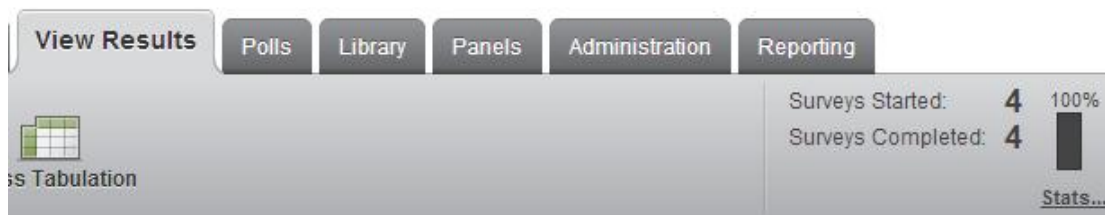
Further down the screen, there is an "Advanced Options" drop down menu. Here you can click "Delete All Responses…"
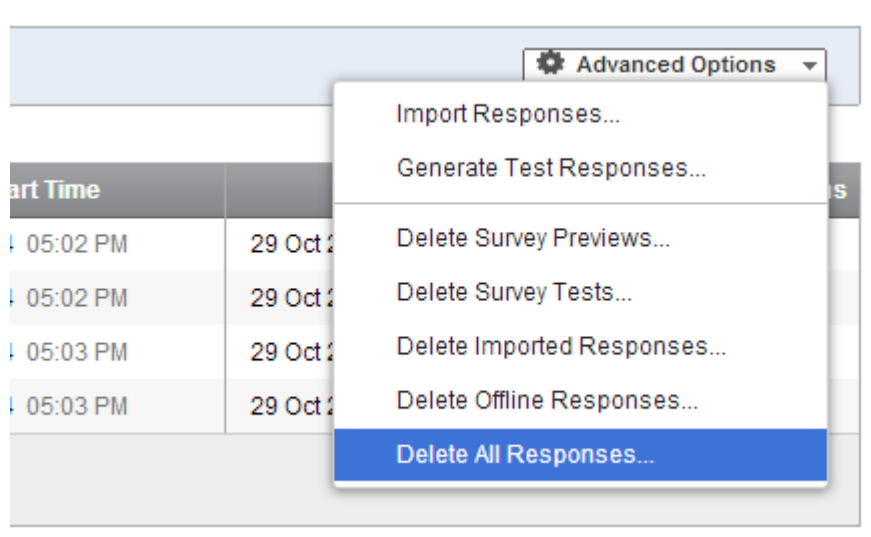
A warning will appear. Type in "delete" within the text entry box and then press :
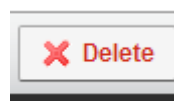
9. <u>Example Survey</u>

To see an example of how each style of question looks, click the link below to see an example survey:

<u>https://lincolnpsych.eu.qualtrics.com/SE/?SID=SV_emQq0MvZoUwtXff</u>

Qualtrics also has a very comprehensive FAQ site. This covers pretty much everything you need to know (such as how to cite Qualtrics to how you export your survey to word)!
<u>http://qualtrics.com/university/researchsuite/research-resources/other-resources/faqs/</u>

If you get stuck on anything else, please feel free to email <u>psychtech@lincoln.ac.uk</u>. Remember, once you have made your survey, you need to get it approved by your supervisor before you can make it live.