CREATING A SURVEY WITH QUALTRIC
April 2020

This document shows how to build a survey with Qualtrics. This includes how to start a survey, add survey instructions, add questions of various types, format responses, and add skip logic should that be necessary.

BEFORE STARTING IN QUALTRICS

Before using Qualtrics to build a survey, Organizational Development suggest you plan and build your initial survey draft as a Word document. Draft the survey instructions, specific questions and response categories, the order of questions, and any skip logic or branching if necessary. Have colleagues and any collaborators review the survey.

DESIGN CONSIDERATIONS

There are several design considerations with online surveys. You will need to decide if you want a "single page" survey in which respondents must scroll down to see all the questions (appropriate just for very short surveys) or use a series of pages with just a few questions on each page instead. You also need to be aware that surveys format differently on a smart phone vs. larger computer screens on a desktop, laptop, or tablet. With these considerations in mind, your online surveys should be as short and simple as possible – collecting just the information you really need.

## IMPORTANT NOTE ABOUT SAVING YOUR SURVEYS

When building a survey, Qualtrics saves your work automatically behind the scenes so there is no need to "Save" or "Save As" via a menu. This is a convenient feature but can be annoying if you experiment with modifying an existing question and then decide you want to revert to the previous version of the question. Because Qualtrics is saving behind the scenes, the question in its original form is no longer available.

STARTING A NEW SURVEY

- Once logged into Qualtrics, click on the blue button labeled "Create new project" at the top right portion of your dashboard.
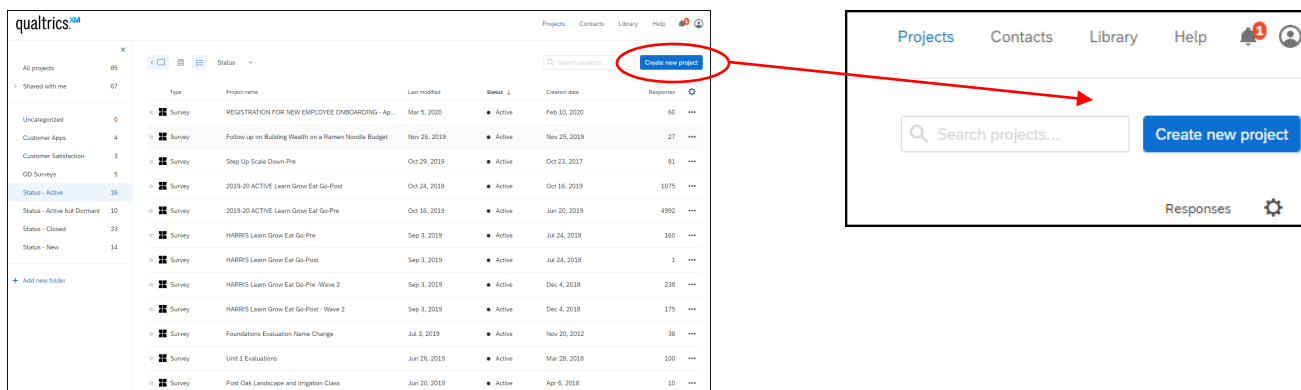
- Click on "Survey" under the "Create your own."
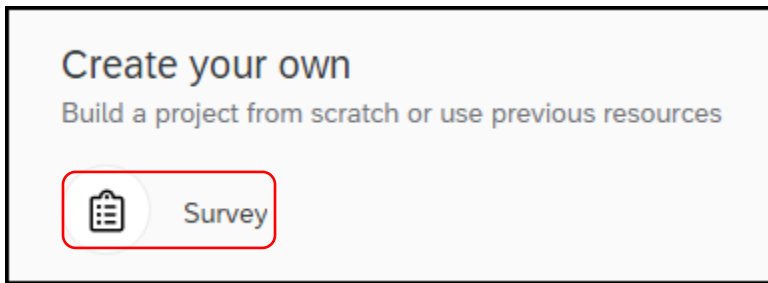
- Then, on the next dialogue window as shown below, you have four ways to start a new survey (a blank survey, copying from an existing Qualtrics survey, from a Qualtrics library, or from a Qualtrics survey previously exported to a file).

  Here, stay with the default choice (Blank Project) since we are starting from scratch with our draft survey initially built in Word.
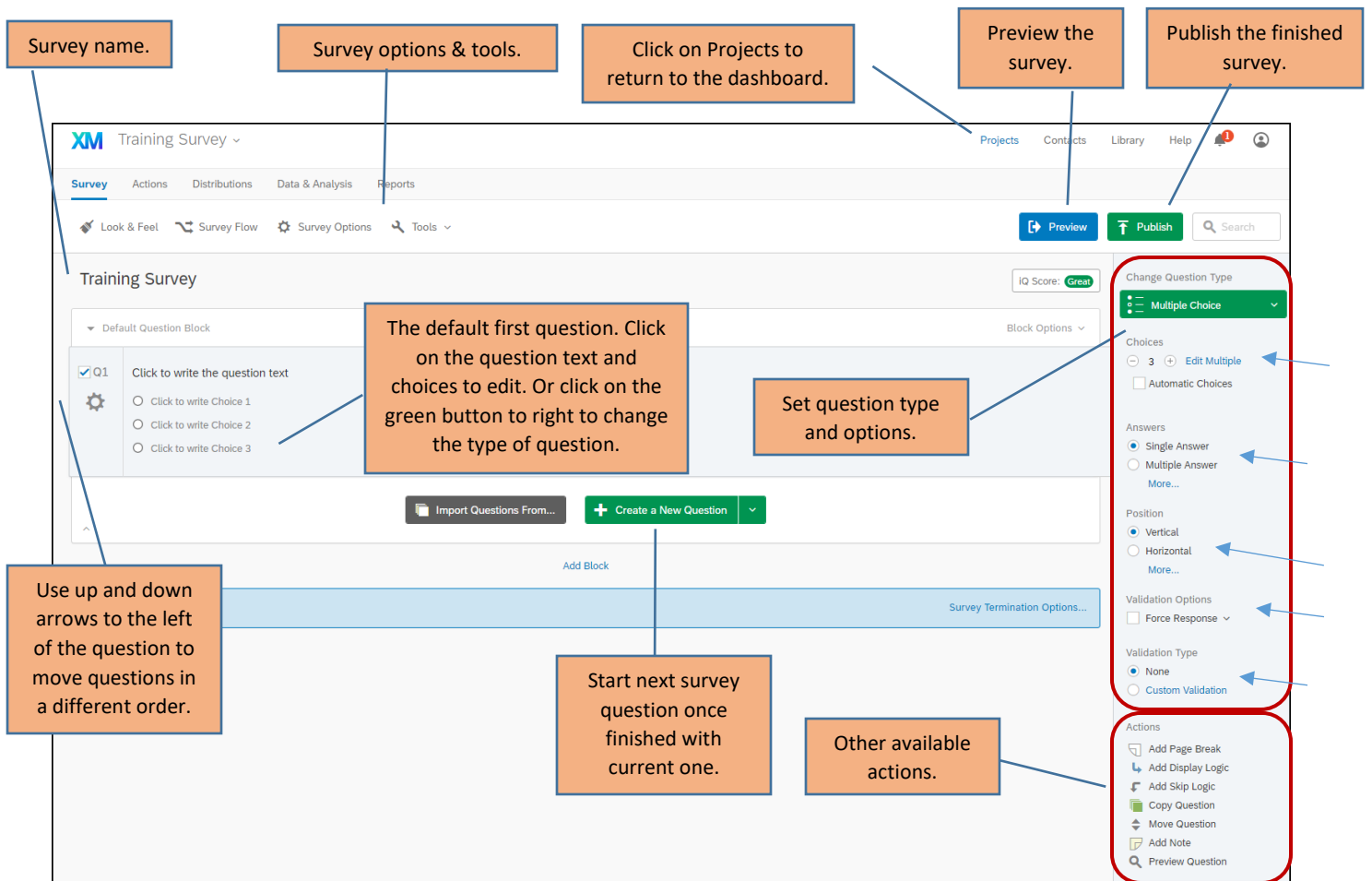
  Enter a name for the new survey and then click on the blue "Get Started" button. Do not enter a generic name like "Survey." Be specific with a year, survey purpose, location and/or target audience if applicable. For example, 2020 Brazos County Hay Producers Survey, Summer 2020 Tri-County Youth Volunteer Survey, or Brazos County Needs Assessment.
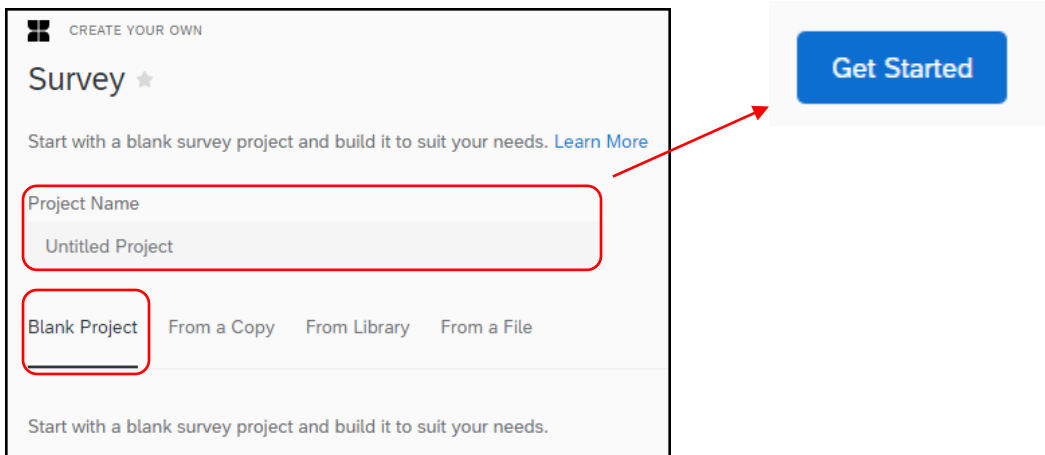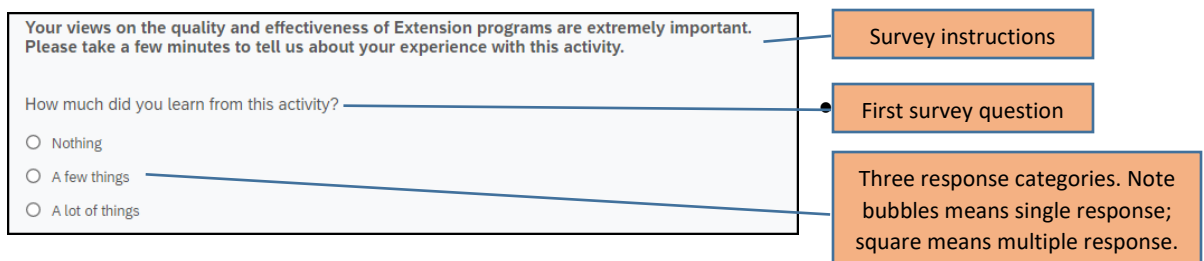

THE SURVEY BUILDER INTERFACE

On the following page is the interface to build a survey once you name it. The same interface appears when you return to continue building or edit a survey you already started.

- Here are the major parts of the survey builder interface:

Survey name.

Survey options & tools.

Click on Projects to return to the dashboard.

Preview the survey.

Publish the finished survey.

The default first question. Click on the question text and choices to edit. Or click on the green button to right to change the type of question.

Set question type and options.

Use up and down arrows to the left of the question to move questions in a different order.

Start next survey question once finished with current one.

Other available actions.

- The type of question you select dictates the available options. Note that "Multiple Choice" is the default question type selected by Qualtrics (green box above). Below it are the options for this question type (see arrows). These includes the number of response categories (use + and – to adjust), single or multiple response, response category alignment, making a question required (force), and validations.

- Click on the green box to change the question type.

- The first question is where you place your survey instructions. Simply type your instructions before the question. You can format text using the Rich Content Editor. You can add instructions to any question.


Survey instructions

First survey question

Three response categories. Note bubbles means single response; square means multiple response.

- Once you finish a survey question, click on "Create a New Question" to start the next one.


- Simply <u>continue this process for each of your survey questions</u> by first selecting the question type and any appropriate options, and then typing in your question, response categories (if any), etc. until you have entered all of your questions.

- At any time, click on "Projects" at the top right to return to the main dashboard. Remember, Qualtrics is saving your work in the background as you go.

- Now is the time to:

  o Rename your questions variables (Q1, Q2, Q3, etc.) if appropriate. If you ever export your data to Excel or some other file format, it is handy to have the names in order. Use "auto-number questions" under tools.
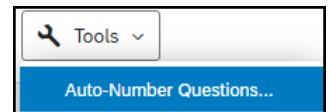
  o Insert page breaks so you have one or just a few questions (depending on their length) per page so respondents do not need to scroll down to see more questions. They will click on the right arrow to continue instead.

  o Add any skip logic if you have any (i.e., if Q1 = "Yes" then go to Q5, else continue with Q2). <u>Do this after auto-numbering questions</u>!
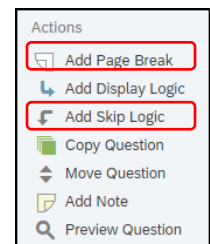
- The Texas A&M AgriLife Extension logo will be automatically placed at the top of the survey.

- You can use the Preview button at any time to see how the survey looks, including on a smart form (as show below).
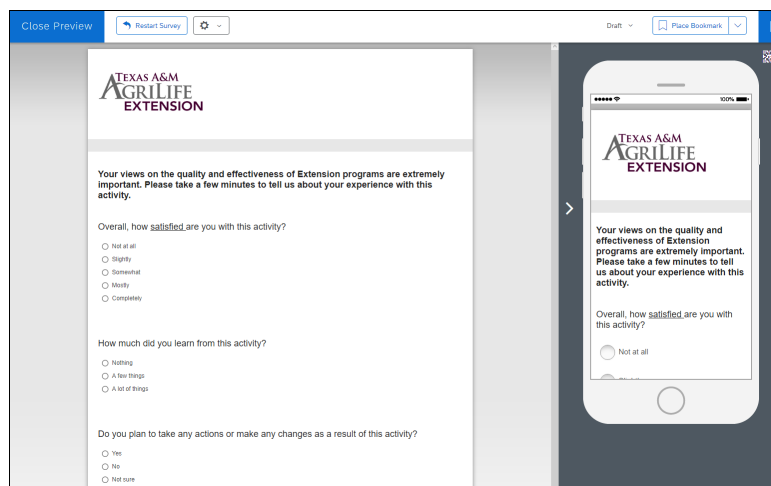
SURVEY OPTIONS

- With survey questions ready, now set any survey options that fit your needs. Qualtrics selects a few by default (those checked or radio buttoned below).
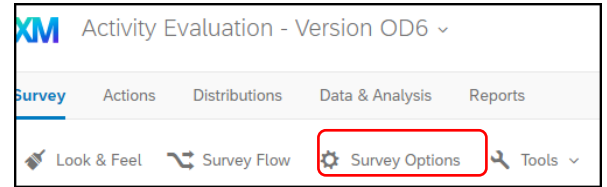
You might consider a few other options (see red boxes below). The "Prevent Ballot Box Stuffing" keeps respondents from answering the survey more than once. Use "Survey Expiration" to make the survey available just for a specified date range. You can also create a custom end-of-survey message instead of the generic default message (discussed next).

Custom End-of-Survey Messages

- Another survey option is a custom end-of-survey message. This can be handy if you want to direct respondents to additional resources such as web pages, files, etc.

- Within the Survey Options page, start a new message in your library as shown below.
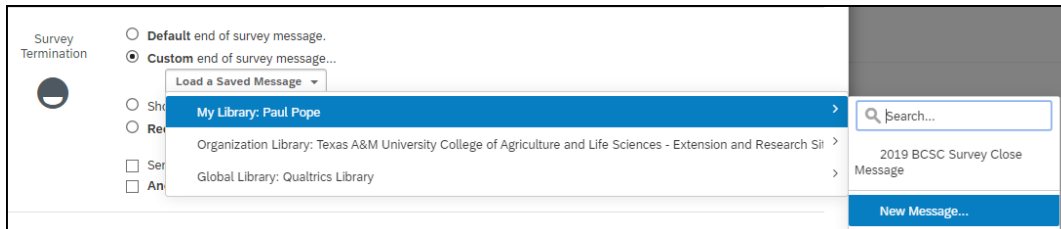
- Be sure to provide a description of the message. It will be stored in your message library once you save it.

  Type in your message and, if appropriate, include any resources you want to provide respondents. This might be web links (directing them to your home page or to a web page promoting an upcoming activity), files, media, tables, etc.
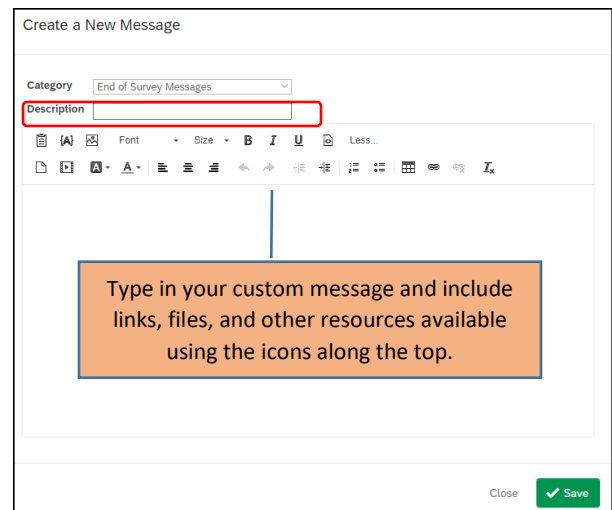

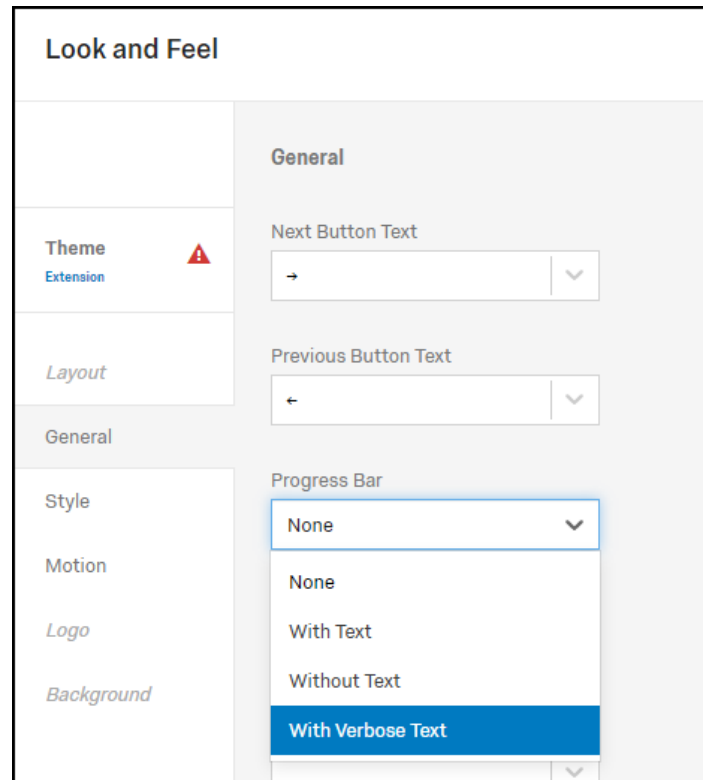- Here is an example with a thank you note, two web links, and a pdf file:
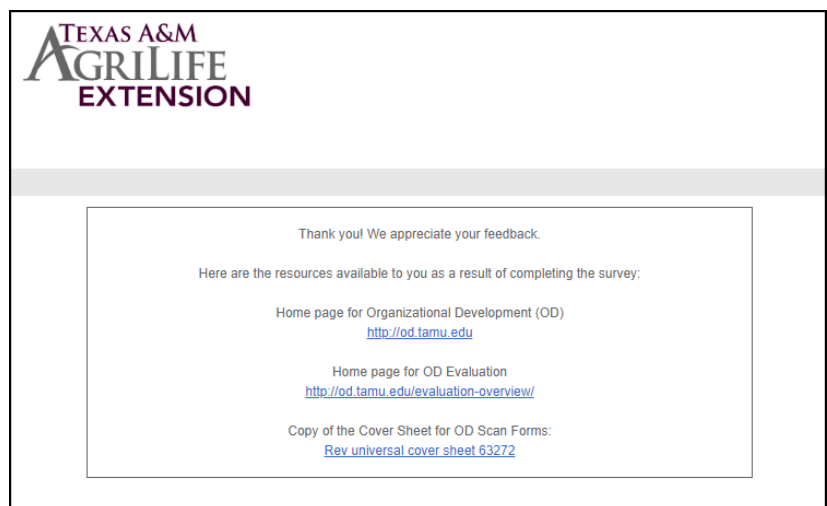
- For more information on survey options:
  https://www.qualtrics.com/support/survey-platform/survey-module/survey-options/survey-options-overview/

SURVEY LOOK & FEEL

- There are a number of options for formatting the look and feel of the survey. One that respondents appreciate is the inclusion of a progress bar. This informs respondents how far they have progressed through the survey.
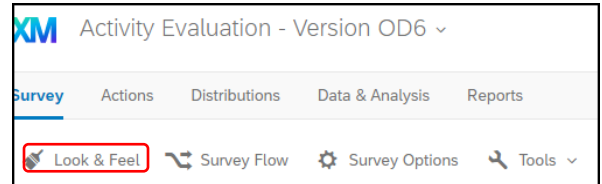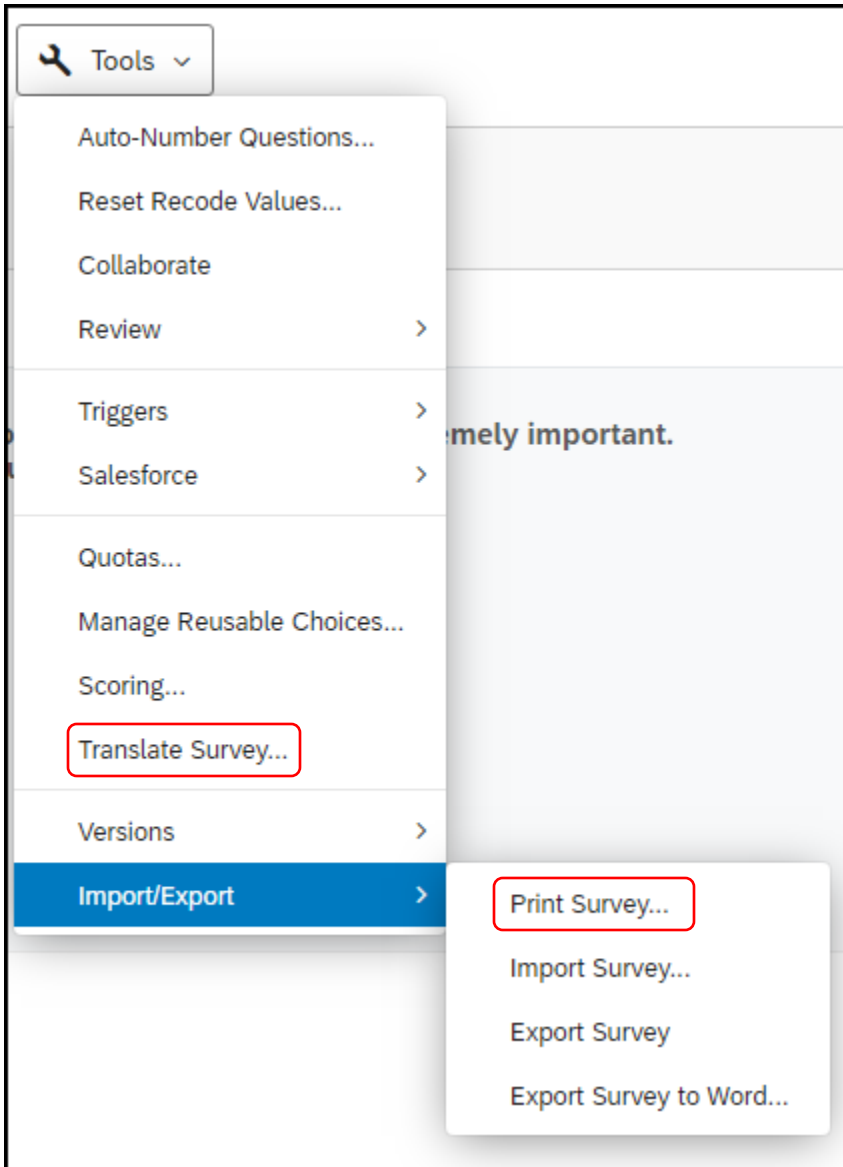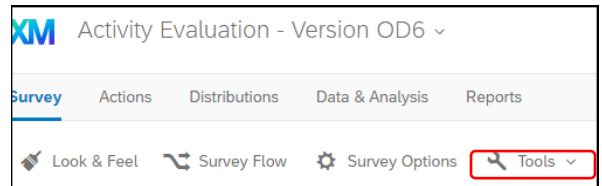

- To set the progress bar, click on the pull-down and select "With Verbose Text." This provide the most information to the respondent.

- For more information on survey look and feel:
https://www.qualtrics.com/support/survey-platform/survey-module/look-feel/general-look-feel-settings/

TOOLS

- Under Tools, there are a few options you may find useful including printing a survey (under "Import/Export") and "Translate Survey" to make the survey available in other languages.

- For more information on survey tools:
  https://www.qualtrics.com/support/survey-platform/survey-module/survey-tools/survey-tools-overview/

PUBLISH A SURVEY

- Once the survey is ready to go with survey questions and options set, click on "Publish" in the top right corner.

    This activates the survey and allow you to move on to the distribution phase.

- Next, you will see the screen below. Note Qualtrics provide an Expert Review of the survey – checking for things like excessive length, wording, use of large complex tables, etc. Click on "View recommendations" to see suggestions for improvement.

- Click on "Publish."
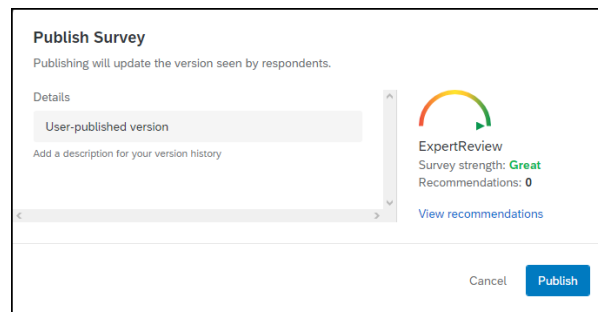
- Qualtrics activates the survey and provides an anonymous link as seen below. At this point, you can include the link in a survey invitation sent to your target group via email. However, there are many other distribution options – discussed in another document. Optionally, you might consider creating a shortened URL via one of many tools available to do that – particularly for an in-person activity in which participants must enter the URL to access the survey.
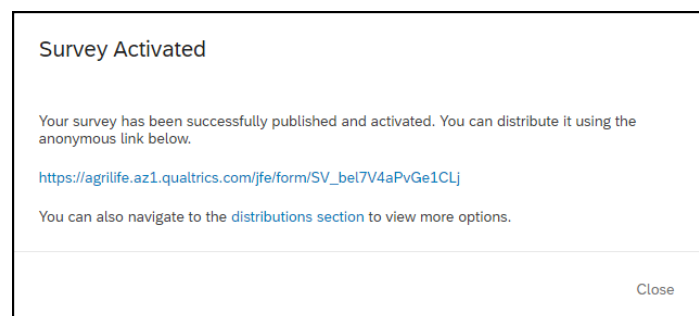
- Returning to your main dashboard, you will notice the status of the survey changed from new to active.