

Qualtrics Quick-Start Guide

Creating and running a survey study: The basics

What is Qualtrics?



- Qualtrics is Western University's survey platform of choice. It allows researchers (or anyone interested in collecting data) to efficiently design and distribute a survey to participants
- This slideshow is designed to be a basic introduction to the platform and some of its features
- This is not a comprehensive guide, though detailed information on all features can be found here:

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-module-overview/>

Creating a project



- Navigate to <https://mysurveys.uwo.ca/>
 - You will need your UWO login and password (same as logging into Student Center, OWL, etc.)
- Follow these instructions for creating your project
<https://www.qualtrics.com/support/survey-platform/my-projects/creating-a-project/>
 - You will likely need to select a “blank survey” project

qualtrics^{XM}

Projects

Contacts

Actions

Library

Help



+ Add new folder



Last modified ▾

Search projects...

Create new project

All projects

20

Type

Project name

Last modified ↑

Status

Responses



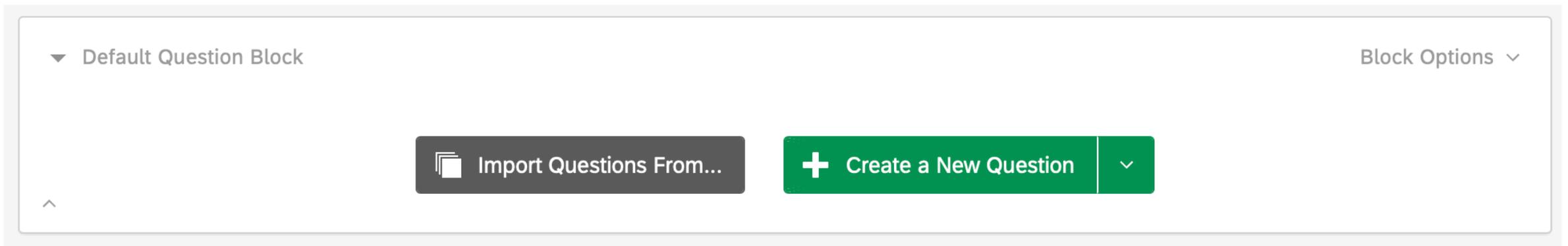
First place to start

- When running a survey-based study, all research ethics components must be present just like an in-person study. For example...
 - Letter of Information (LOI)
 - Consent indication
 - Debriefing information, if required (e.g. if deception is used)
- We will go through these components and see how they can be created via Qualtrics
- You will need to submit your survey alongside your REB application for approval before distributing to participants
- Forms and info: <https://huronatwestern.ca/student-life-campus/beyond-classroom/research-huron/reb>

Blocks and questions



- Blocks are a way to group and organize the questions/items displayed to your participants
- Questions are the items within a survey block
- After constructing your LOI in accordance with REB policies, you can implement it as a “block” in your survey.
- Qualtrics will already have a blank, default block for you to start with
 - Select “create a new question”



Letter of Information

- When you click to add a question, you will be able to select from many question types
- Thankfully, the commonly used types are intuitively named. For an LOI/consent form, you might select “descriptive text”
 - You can copy paste your LOI into the text field created by adding a descriptive text section

The image shows a vertical menu of question types organized into categories. The 'Descriptive Text' option is circled in red. The categories and their items are:

- Static Content**
 - Descriptive Text (circled in red)
 - Graphic
- Standard Questions**
 - Multiple Choice
 - Text Entry
 - Rank Order
 - Matrix Table
 - Slider
 - Side by Side
- Specialty Questions**
 - Constant Sum
 - Hot Spot
 - Graphic Slider
 - Net Promoter Score®
 - Signature
 - Pick, Group, and Rank
 - Heat Map
 - Drill Down
 - Highlight
- Advanced**
 - Timing
 - File Upload
 - Captcha Verification
 - Meta Info Question
 - Screen Capture
- Replace From Library**
 - Question Library

Consent indication



- There are several ways of providing consent in a survey. For example...
 - Active consent: participant checks a box/presses a button labelled “I consent/do not consent to participate in this study”
 - Tacit consent: you clearly indicate to participants that by continuing with the survey, they are consenting to participate.

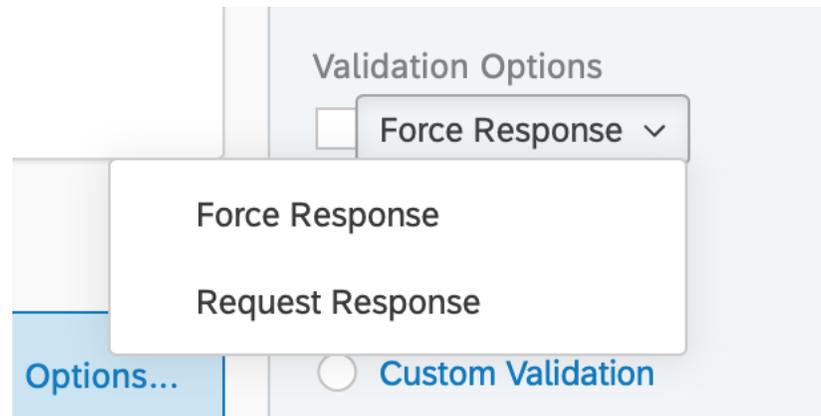
The screenshot shows a survey editor interface with a dropdown menu set to "LOI/Consent" and a "Block Options" dropdown. Two questions are visible:

- Q2** (checked): "This is the Letter of Information
Blah blah blah
This study is awesome". It has a gear icon for settings.
- Q3** (unchecked): "Consent indication". It has a gear icon and two radio button options:
 - I consent to participate in this study
 - I DO NOT consent to participate in this study

At the bottom, there are two buttons: "Import Questions From..." and "+ Create a New Question".

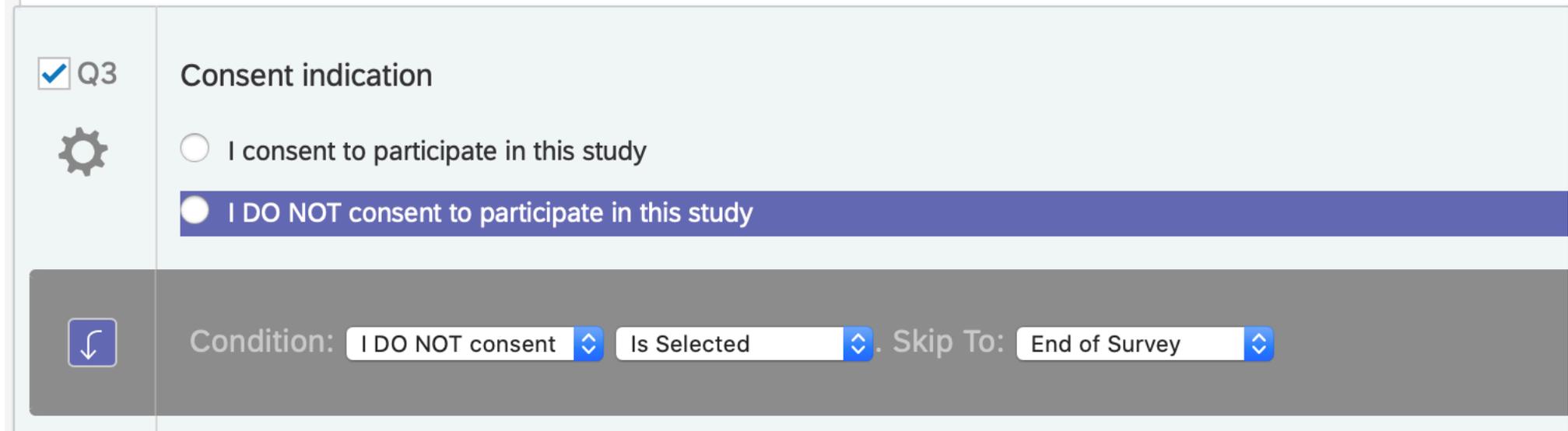
Consent indication

- For consent indication, you may want to check out the question options that appear in the sidebar when you select a question
- For active consent, select “force response”
- Participants will be unable to proceed until they select an option
 - Note: this is the only question you can make participants answer
 - Do not collect personally-identifiable information from participants



What if they do not consent?

- You can use “skip logic” in the question tools sidebar to specify conditions under which a participant will be skipped to the end of a block, the whole survey, etc. It might look like this:



The screenshot shows a sidebar for question Q3, titled "Consent indication". It contains two radio button options: "I consent to participate in this study" and "I DO NOT consent to participate in this study". The second option is selected and highlighted with a blue background. Below the options is a skip logic configuration bar with a downward arrow icon. The configuration is: "Condition: I DO NOT consent [dropdown] Is Selected [dropdown]. Skip To: End of Survey [dropdown]".

Q3 Consent indication

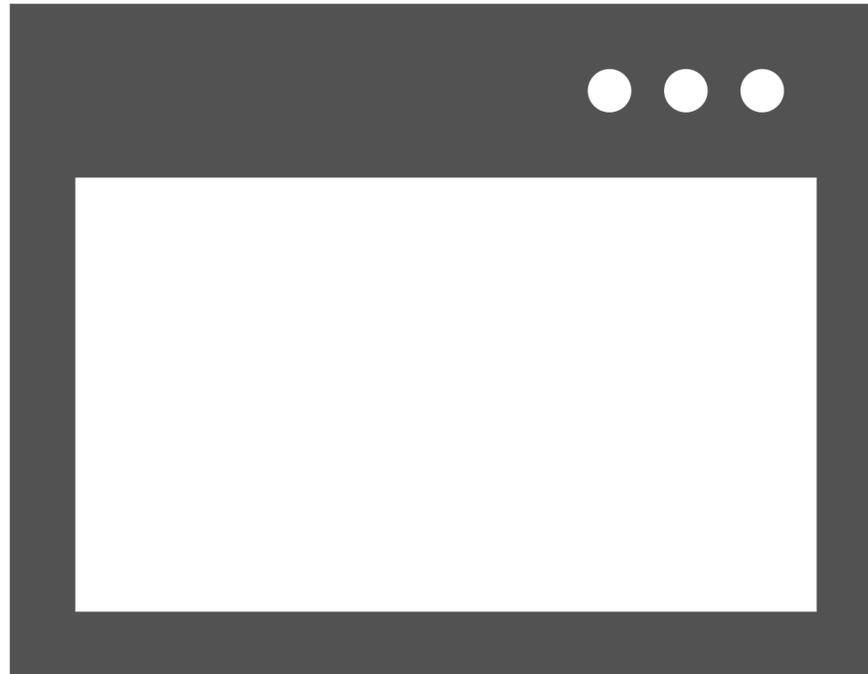
I consent to participate in this study

I DO NOT consent to participate in this study

Condition: I DO NOT consent [dropdown] Is Selected [dropdown]. Skip To: End of Survey [dropdown]

Right to withdraw

- A participant may exercise their right to withdraw from a study at any time simply by closing the survey, the browser window, tab, etc.



Adding study questions

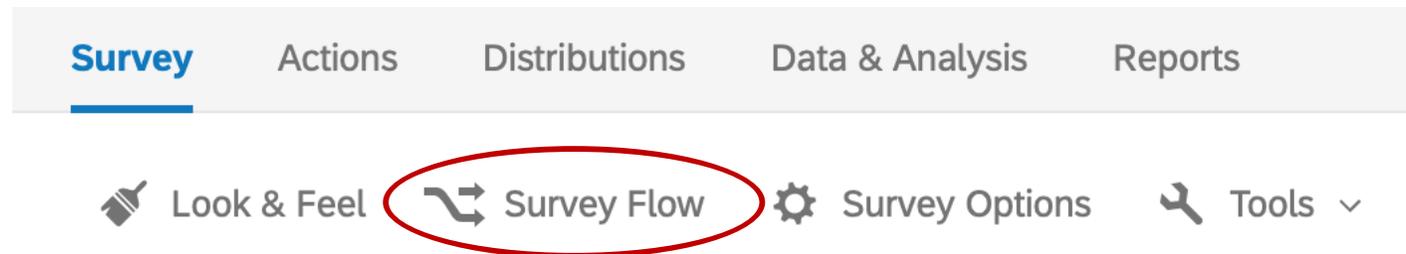
- Adding questions you want to ask participants is done much the same way as adding a question or block for your LOI and consent page
- For most use cases, question types in the “standard” section are completely fine
- Often, a question type can be implemented in several ways
 - For example, a rating question (e.g. scale) can be done using a multiple-choice selection or clicking and dragging a slider
- Test out different options and see what you like best
 - When you select a question, you can preview it to see what it will look like for your participants

Validation and timing

- Question validation allows you to do things such as
 - Forcing/requesting a response to a question
 - Ensuring the correct content is inputted by the participant (for example, you might be asking for a whole digit number between 1 and 10)
 - NOTE: when you use validation, participants may not be able to skip the question
- Timing allows you to do things such as
 - Limiting the amount of time a participant can spend on a question
 - Recording the amount of time a participant spends on a question
- These tools are located in the sidebar that appears when you select a particular question within a block

Survey flow

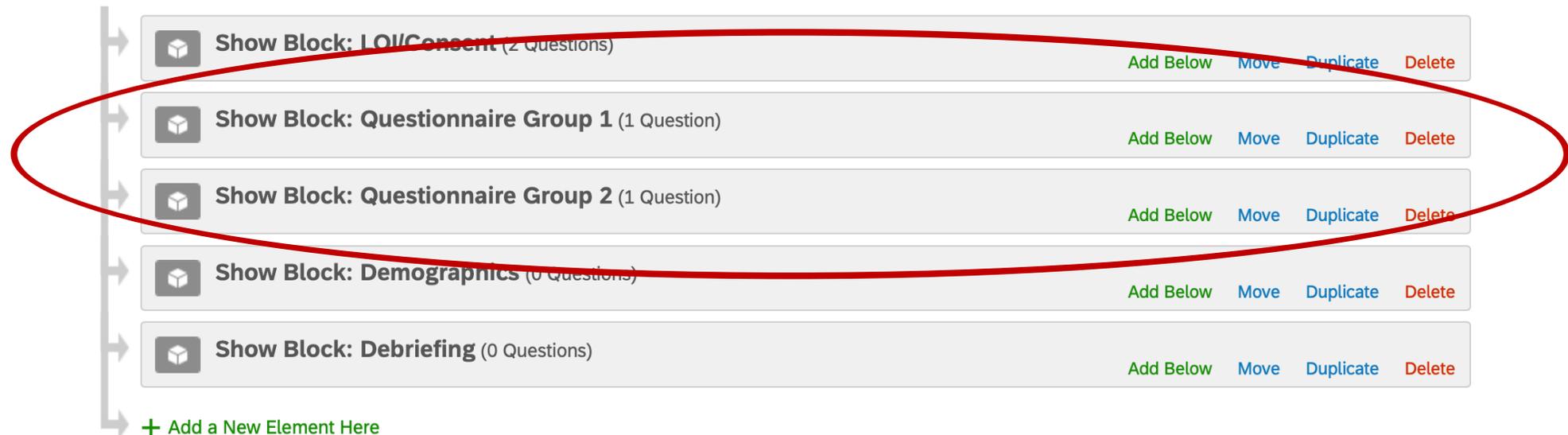
- Survey flow is exactly what it sounds like: how do the components of your survey flow? In what order?
- You can find this information and edit by clicking the “survey flow” tab at the top of the page



Survey flow example

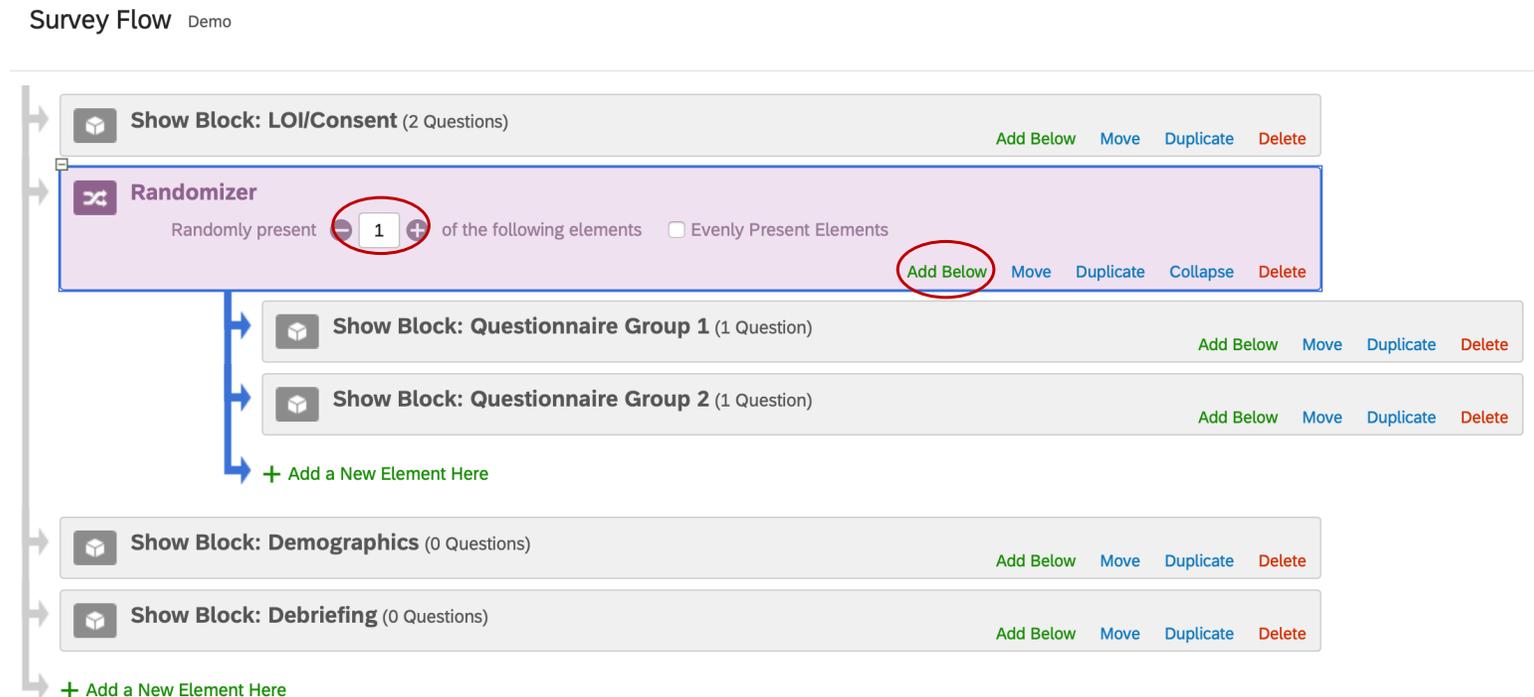
- Let's suppose we are running a study with two conditions, which must be randomly assigned
 - Without editing your survey flow, it might look like this: two blocks, one for each condition, in consecutive order

Survey Flow Demo



Survey flow example

- That's no good – we want participants to only complete one of the questionnaires, for group 1 *or* group 2, but not both
 - Here's what the survey flow looks like after adding a “randomizer” below our LOI block to present only one of the elements
 - We can check “evenly present elements” to keep group sizes as equal as possible



Survey flow example

- Now, participants will be randomly presented with one block, therefore assigned randomly to group 1 or group 2
- All other blocks remain the same, viewed by everyone
- Note: for skipping through non-consenting participants, use the skip logic function described previously
- All content editing is done from the main page, not from within the survey flow page
 - The survey flow page is mostly just for directing participants through content you have already created
 - You can drag blocks around in the survey flow to rearrange as you wish

Debriefing

- Your debriefing form, in whatever form necessary based on your study, can be added in the same way as your LOI (e.g. a descriptive text question)
- Don't forget to thank your participants for their time

Useful Qualtrics tabs



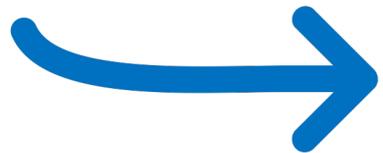
These are located at the top left of the page

Survey: Here, you can make edits to the survey content itself

Distributions: Manage how and when your survey is distributed to participants

Data and analysis: Download and manage your survey data

Reports: A quick and easy way to glance at some descriptive statistics about your survey responses



Survey

Actions

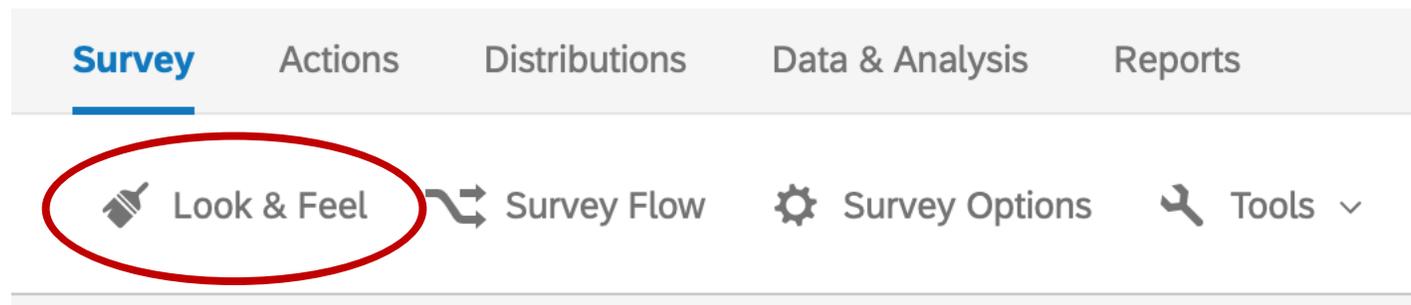
Distributions

Data & Analysis

Reports

Look and feel

- Once you have finished creating the content of your survey, you can navigate to the “look and feel” subsection of the “survey” tab
- Here, you can change how your survey looks and preview changes in real time
 - Some good ideas might be larger and darker text for readability, a good font, institutional affiliation logo, a progress bar, etc



Look and Feel

Dynamic Themes ⓘ

University of Western Onta... ▾

Theme
University of Western Ontario - Theme 1

Layout

General

Style

Motion

Logo

Background

Restore Defaults

[Need help?](#)

University of Western Ontario - Theme 1

University of Western Ontario - Theme 2

University of Western Ontario - Theme 3

My Survey ▾



This is the Letter of Information
Blah blah blah
This study is awesome

An example of not-so-good font choices ☹️

Much better 😊

Consent indication

I consent to participate in this study

I DO NOT consent to participate in this study

→

Activating and distributing your survey



- Make sure you click the green “publish” button to ensure your changes are reflected in the survey seen by your participants
 - You must “publish” after every change to update the participant-facing version!
- You will see several options to choose from in the “distributions” tab

How do you want to distribute your survey?

Email Web Social Mobile Online Panel

Send with Qualtrics

Use your own email system

Compose Email

Get a single reusable link

Generate a trackable link for each contact

Downloading your data

- When you have finished running your study, navigate to the “data and analysis” tab
- Select the data export format that works best for you
- Note the “more options” menu if you require extra info, such as question viewing order



Download a data table

[Use the legacy exporter](#)

CSV

TSV

Excel

XML

SPSS

Google Drive

User-submitted files



Comma separated values

This is a .csv file that can be imported into other programs. Each value in the response is separated by a comma and each response is separated by a newline character. If your responses contain special characters and you will open this export in Microsoft Excel we recommend using the TSV export. Qualtrics CSV exports use UTF-8 encoding, which Excel will not open correctly by default.

[Learn more](#)

Download all fields

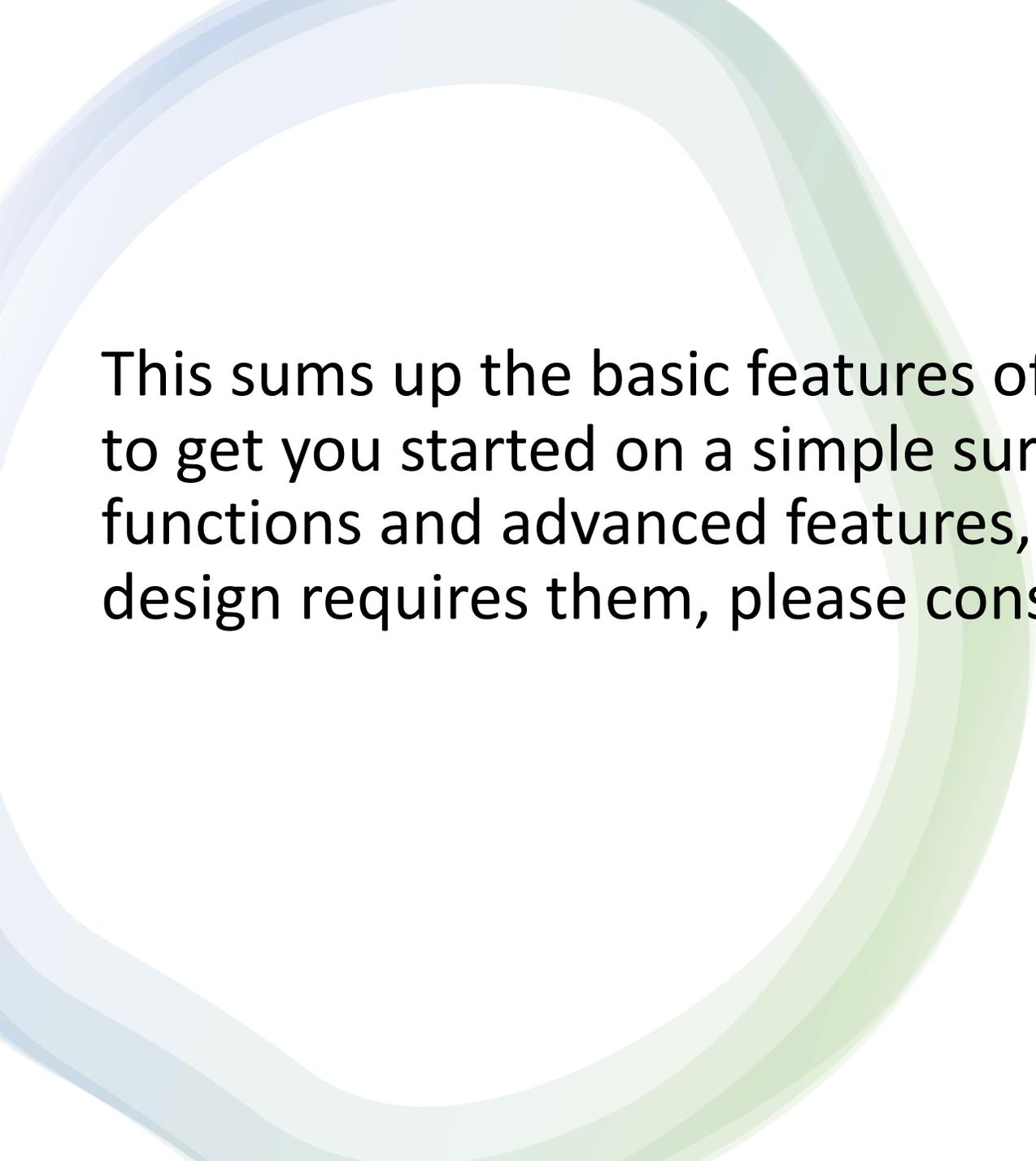
Use numeric values

Use choice text

[More options](#)

Close

[Download](#)



This sums up the basic features of Qualtrics and should be enough to get you started on a simple survey. There are many more functions and advanced features, and if your study or research design requires them, please consult the official feature guide.