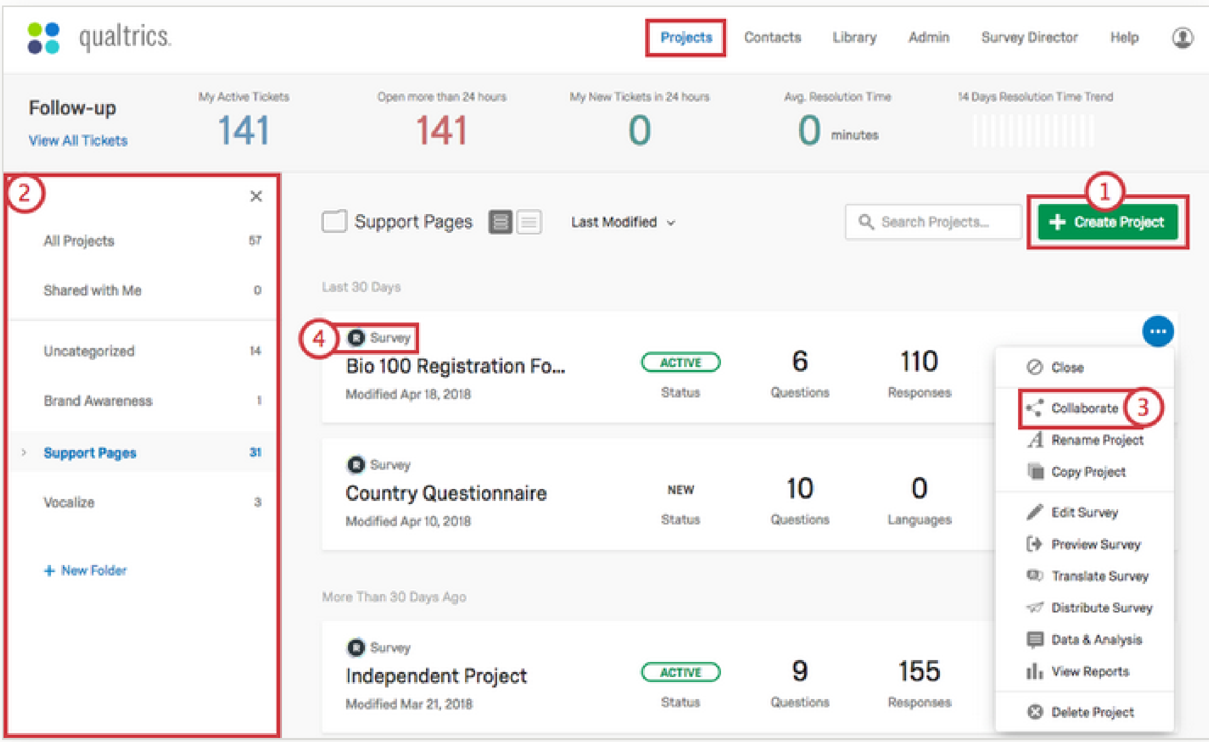
QUALTRICS OVERVIEW AND GENERAL TIPS

Contents

Projects Basic Overview

About the Projects Page

All Qualtrics sessions begin on the **Projects** page – a one-stop shop listing all the XM projects you have created and those that have been shared with you. The Projects page lets you:



1 Create new projects.

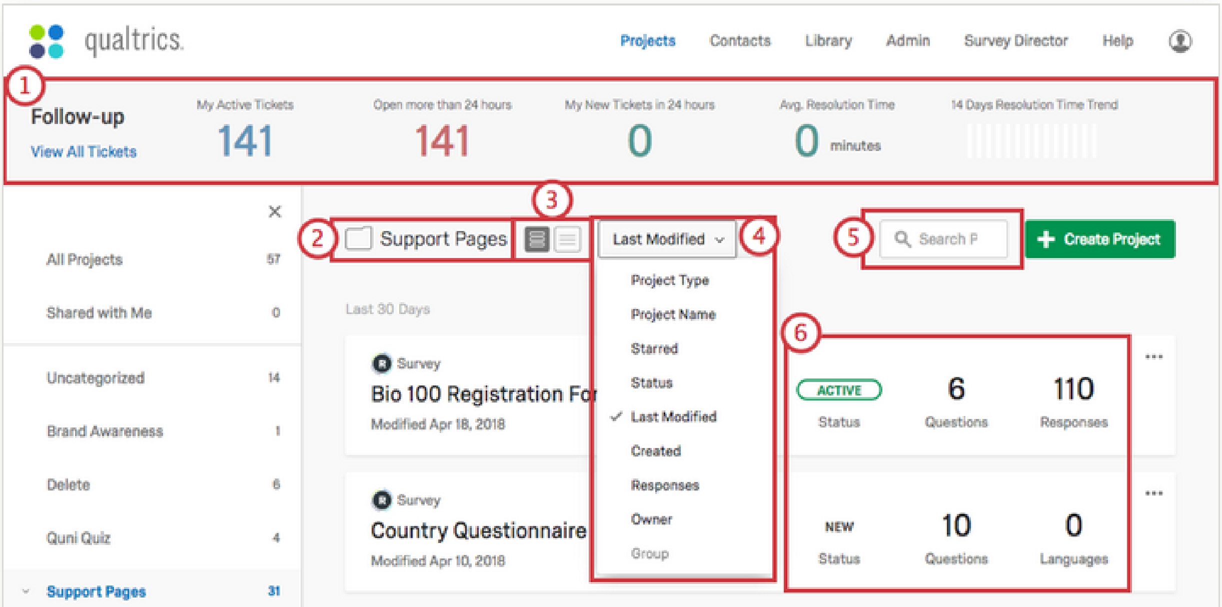
2 Organize, sort, search, and view your projects.

3 Collaborate on projects with colleagues.

4 Identify your projects by their XM type.

Organizing, Viewing, Searching, & Sorting Projects

The Projects page displays practical, at-a-glance information to help you organize, view, monitor, track, and sort through your projects. For example:



1 Track any tickets assigned to you or your team by your XM projects.

2 View and organize projects by folder or category.

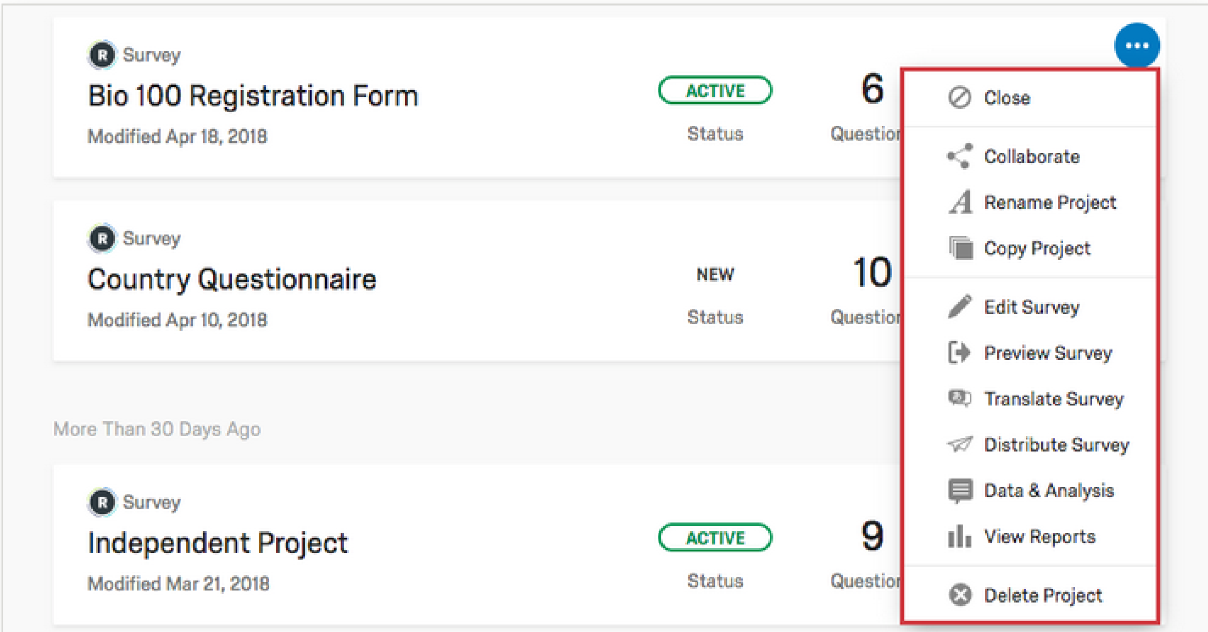
3 Expand or collapse your projects for easy viewing.

4 Sort your projects by various criteria, such as **Project Type**, **Project Name**, or **Last Modified**.

5 Search for projects by name.

6 View metrics summarizing your projects.

On the far-right of every project name you'll see a small dropdown arrow that opens the project actions dropdown menu, which will greatly facilitate your navigation of that project. From here you can Activate, Rename, Copy, Edit, Translate, and Delete your projects, and more.

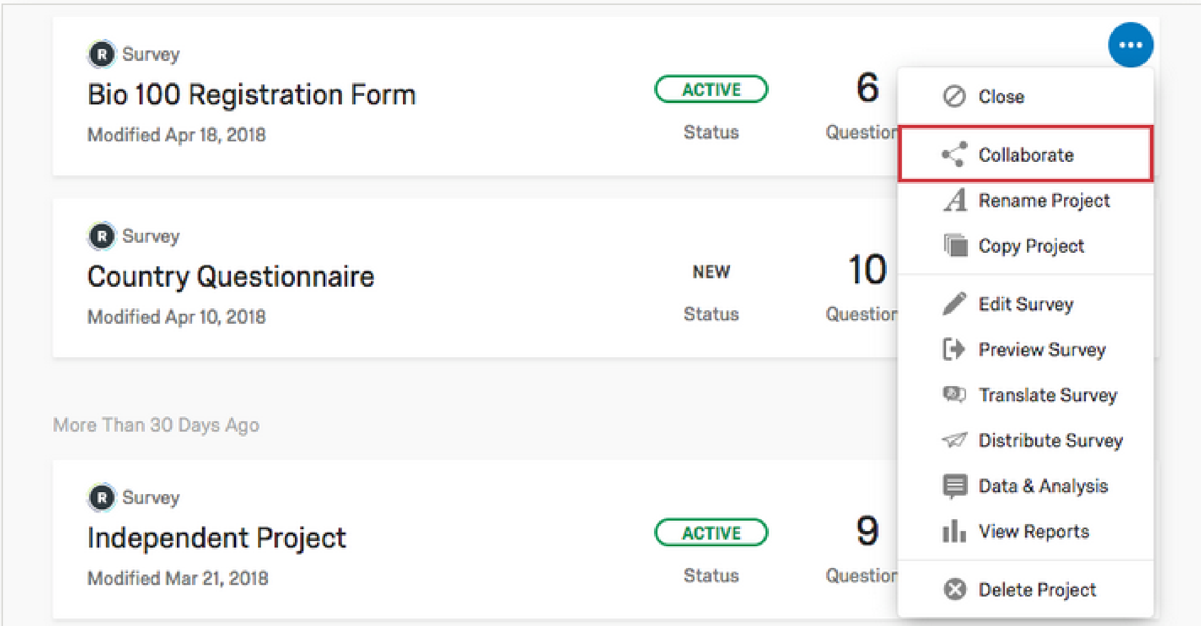


Go to the Organizing & Viewing Your Projects page for step-by-step examples of how to get the most value and power out of the Projects page. On this page you will go through:

1. The project actions dropdown menu's options.
2. The organization of your folders and categories.
3. The sorting and searching of your projects.

Collaborating On Projects

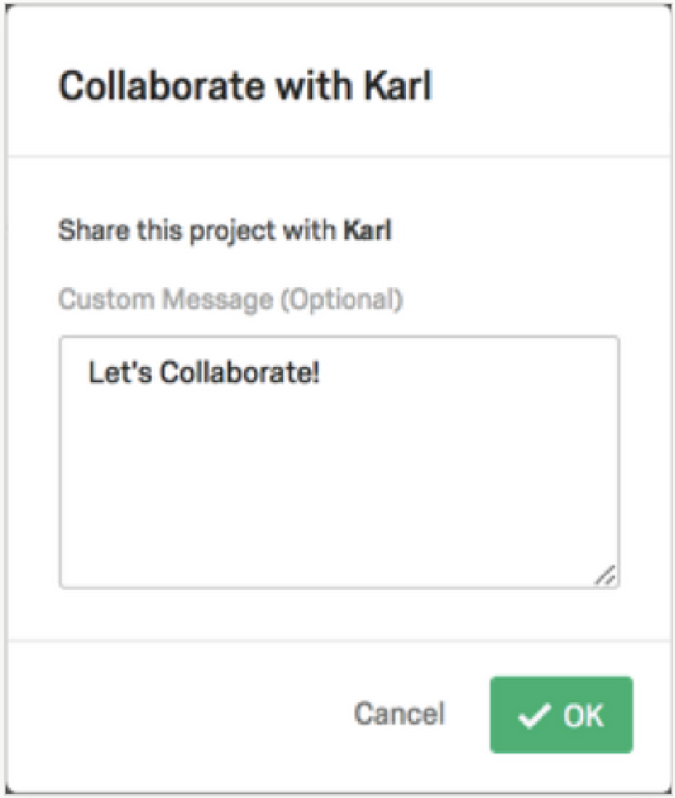
Collaborating on projects is as easy as clicking **Collaborate** from the project actions dropdown menu.



If your account has the proper permissions, you can collaborate with:

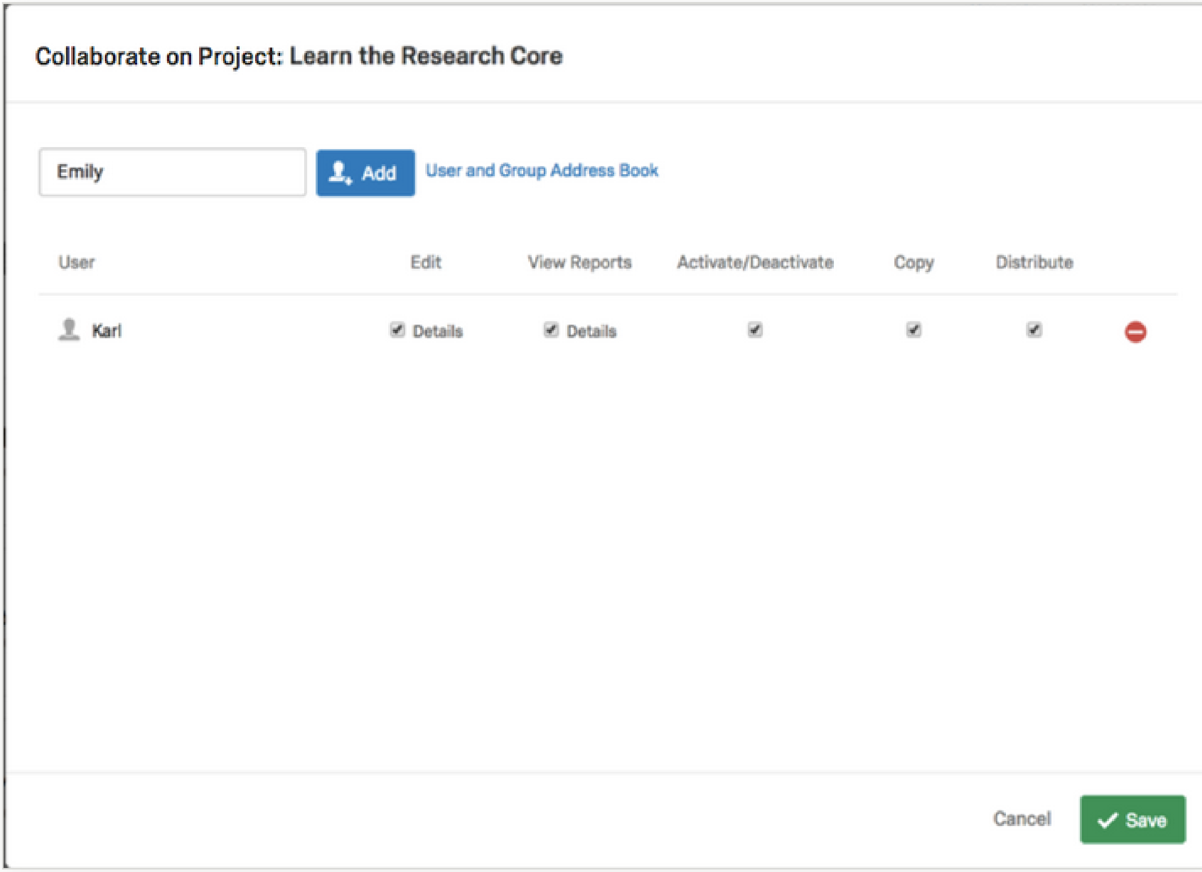
- **Individuals** inside your organization.
- **Teams** within your organization.
- **Collaborators** outside your organization.
- **New collaborators** that may be added later.

To begin collaborating, enter a colleague's email address in the Collaborate popup menu.



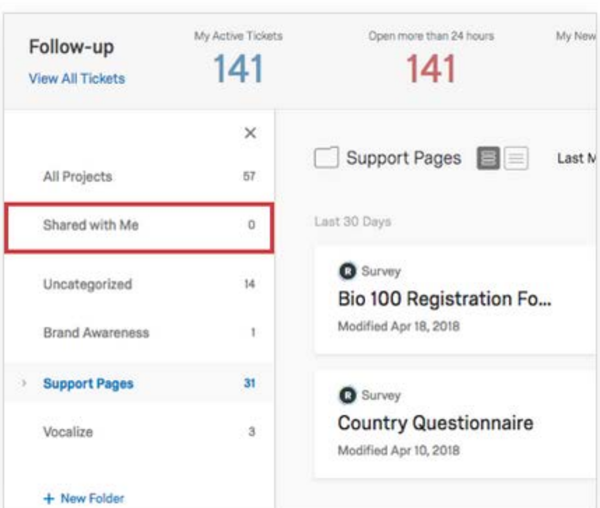
You determine the security level of the projects you share. You can designate full or limited access.

- **Full access rights**: Allows collaborators unrestricted access (while still protecting your account information).
- **Limited access rights**: The **Collaborate on Project** popup menu lets you customize access to specific collaborator needs.

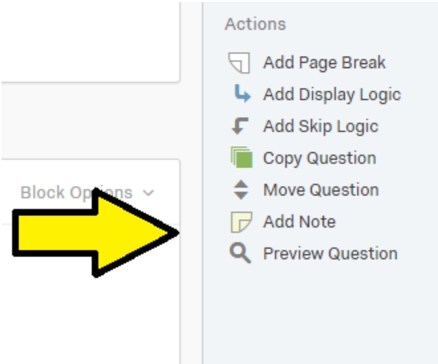


For example, translators may be limited to Edit permissions only while their Activate/Deactivate and Distribute permissions are disabled.

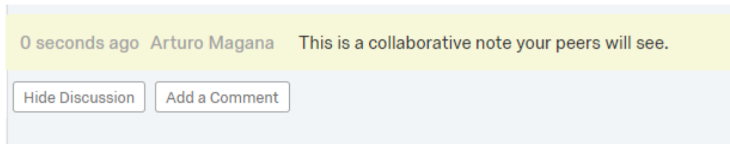
When people invite you to collaborate, their projects will show up in your Projects page. There is even a folder called **Shared with Me** to help you find these projects quickly.



Tip: you can also **collaborate on the question level**. You can add notes to questions. You can access the notes tool here, by clicking on a question:



Notes will appear as such:

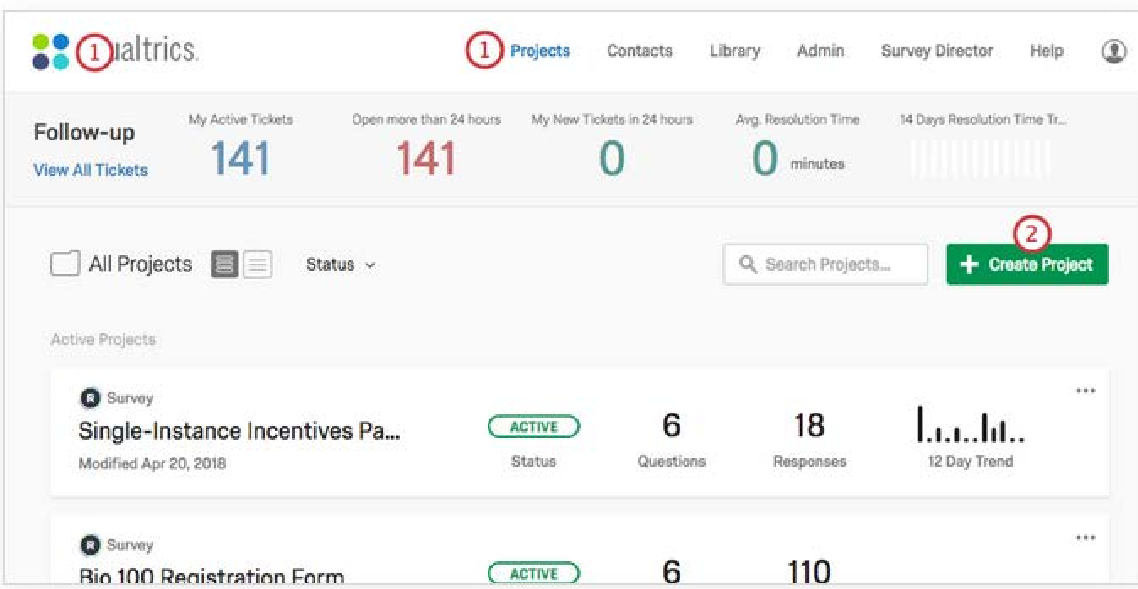


Creating a Project

Creating a Blank Survey Project

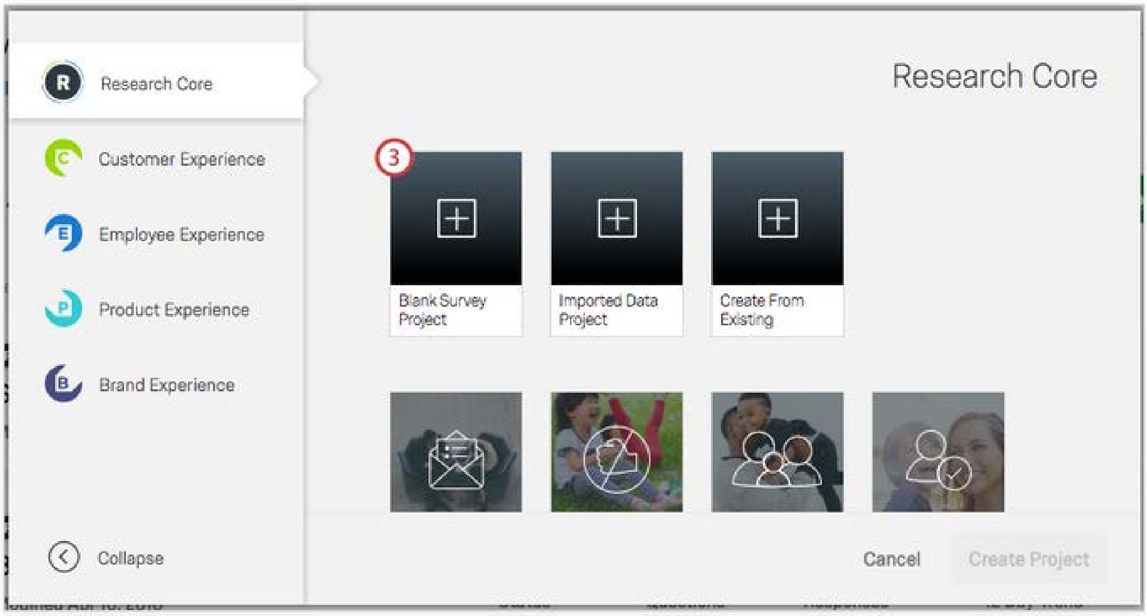
Blank Survey projects are surveys you build from scratch.

1 Navigate to the Projects page by clicking the XM logo or clicking **Projects** on the top-right.



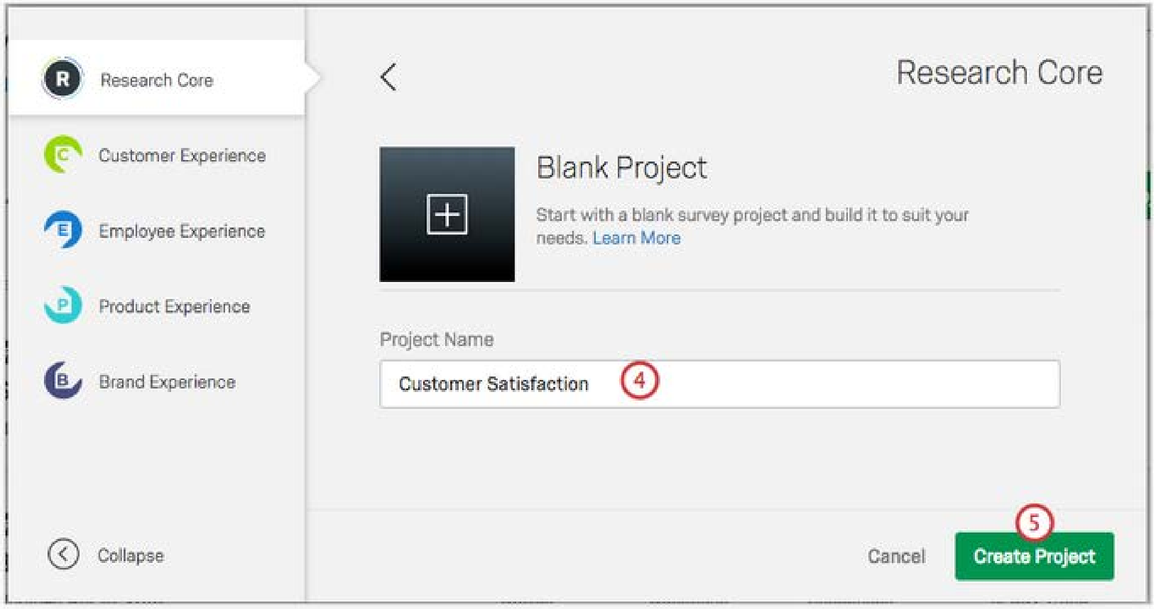
2 Click Create Project.

3 Click **Blank Survey Project**.



Qtip: If you don't select a folder, the project will fall in the default Uncategorized folder. You can always move your survey to a different folder later on. See our Organizing Your Projects page for more information about folders and subfolders.

4 Enter a name for your survey.

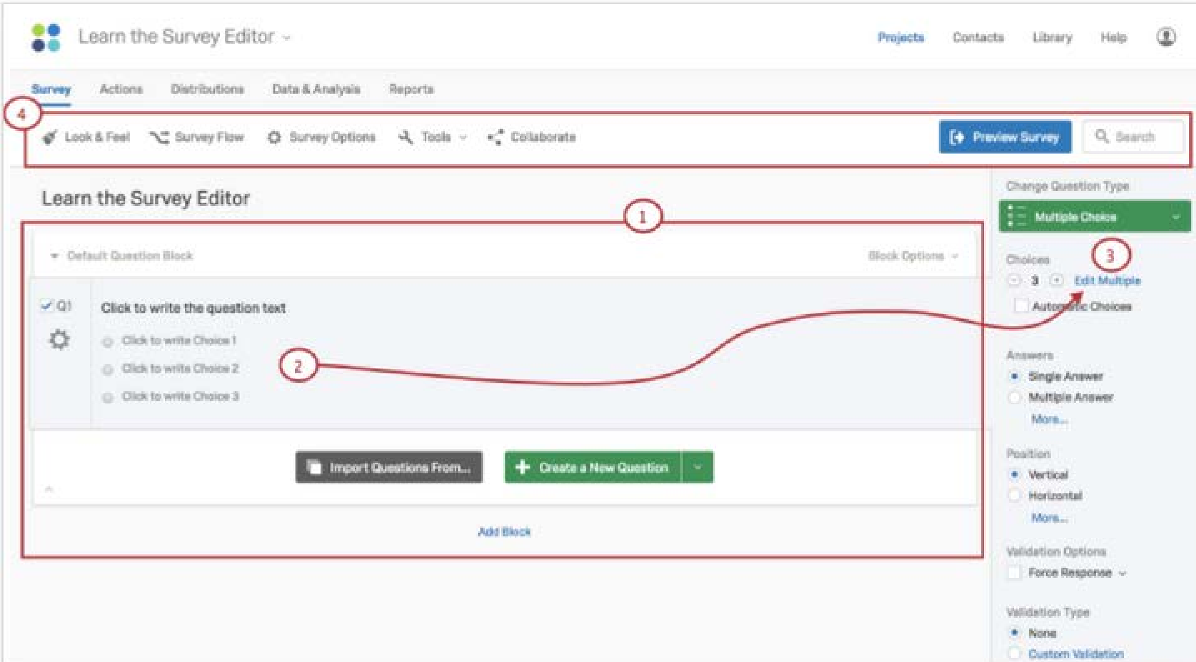


5 Click **Create Project.**

After clicking Create Project, you'll be taken to the Survey tab where you can begin adding questions to your survey.

Survey Basic Overview

As the Survey tab opens, you'll the see the survey editor's most prominent features:



1 Question block

2 Question editing area

3 Question editing pane

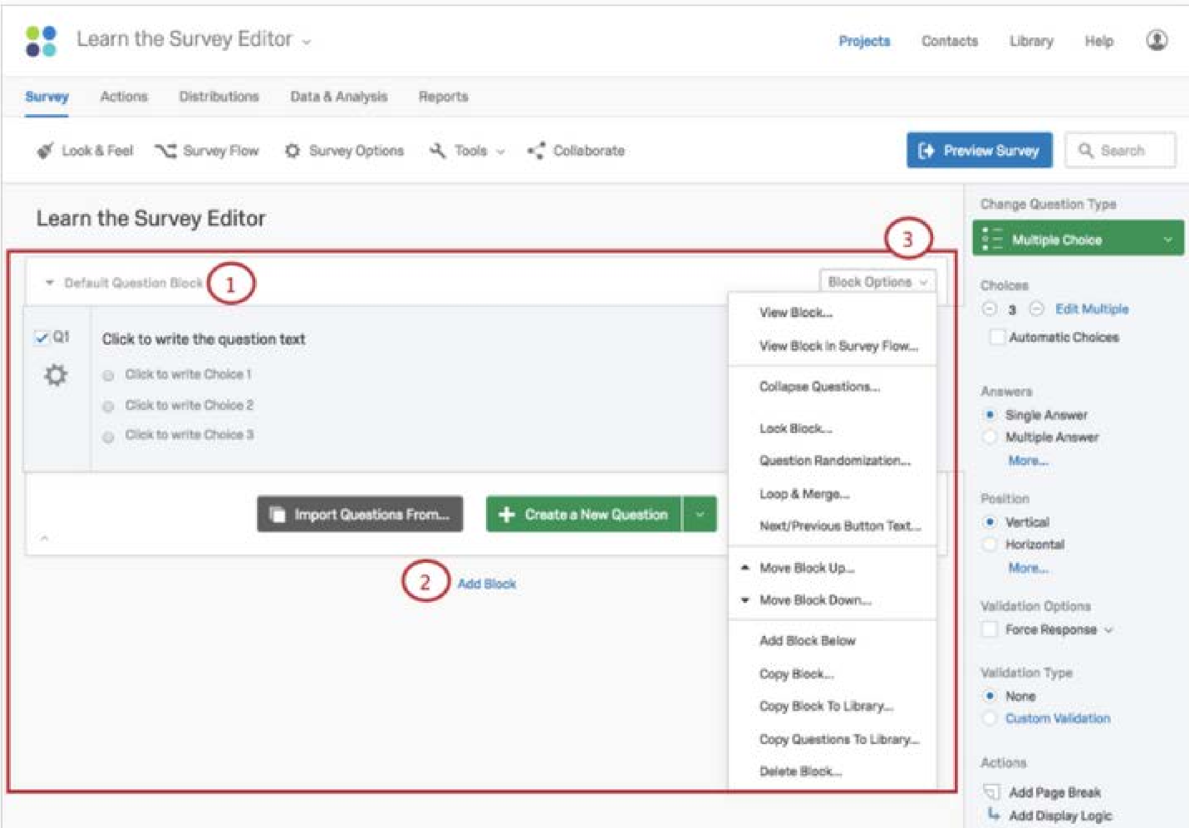
4 Survey toolbar

Qtip: Clicking on a question's editing area opens its 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.

Three elements appear in every block:



1 **Block name:** Change at any time by clicking in the name box and typing a new name.

2 **Add Block:** Lets you create new blocks.

3 **Block Options menu:** Displays an array of one-click block editing choices.

Blocks are best understood with a couple of examples:

- Many surveys start with an initial Demographics block which directs different respondents (e.g., male/female, younger/older, education, etc.) to distinct survey question blocks that precisely target their needs.

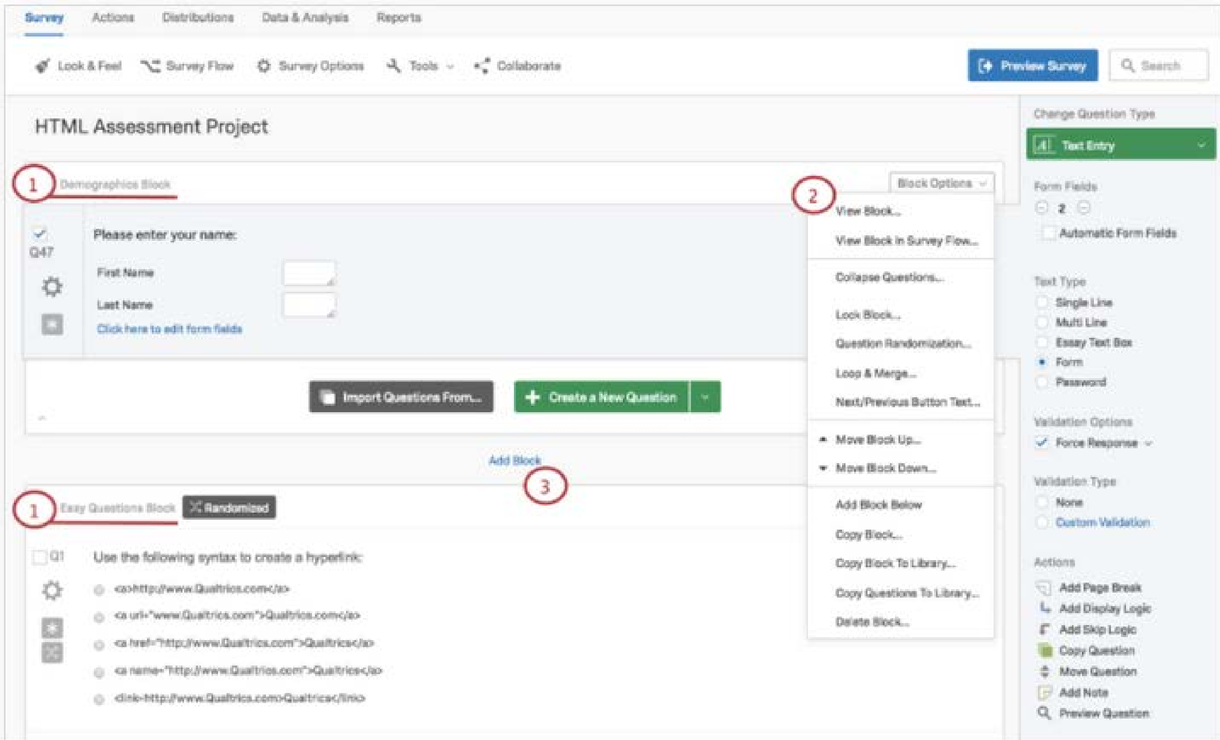
- An application of multiple blocks is revealed in the image below where a starting demographic block collects first and last names. In the following blocks, the names can be recycled to address respondents by their names with the use of Embedded Data logic. The names entered can also be used to generate or update contact lists.

- Additionally, you could channel the various demographics down different survey pathways (i.e., one path for men and another for women) with Branch Logic.

- You can opt certain respondents out of the survey based on quotas achieved for a specific demographic (i.e., quotas based on age, gender, or income level).

- Finally, you could display different survey endings to different demographic groups.

Let's look a little deeper:



1 A second block (Easy Questions Block) appears below a renamed Default Question Block (now called the Demographics Block).

2 The Block Options menu reveals block-level commands, such as Move Block Up/Down, Question Randomization, and Collapse Questions (which shrinks a block's questions for easier viewing).

3 Blocks are separated by a spacer (which includes a handy **Add Block** command).

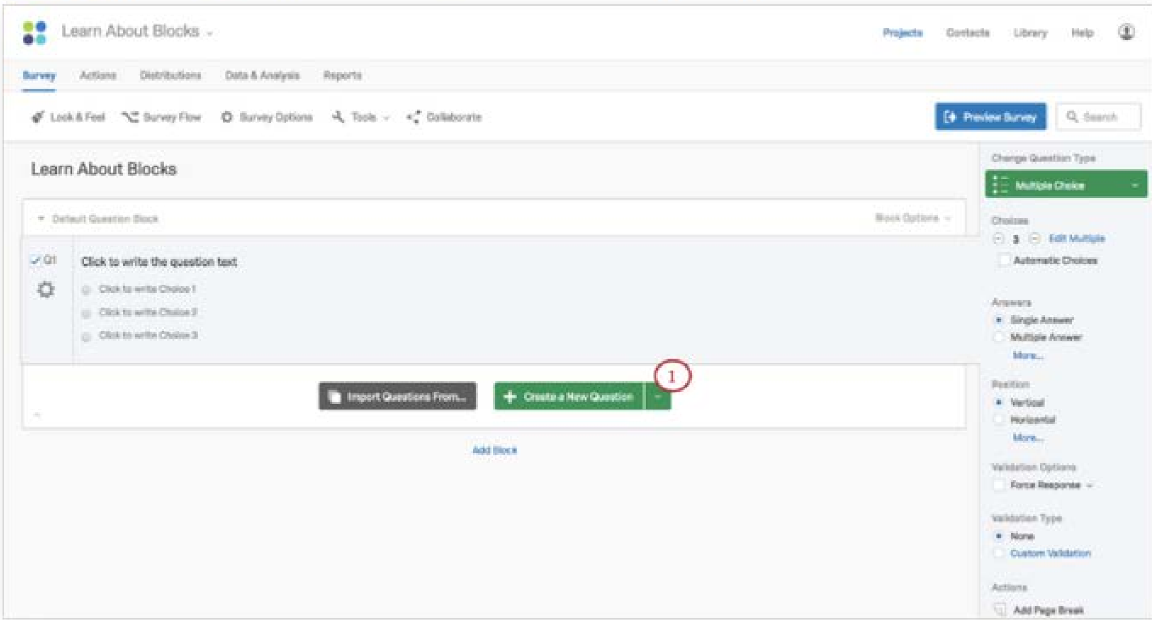
For simple surveys, placing all of your questions in a single block is just fine. But as surveys become more intricate, organizing questions into multiple blocks allows the application of sophisticated Survey Flow logic, branches, randomization, authentication, and Embedded Data logic.

Visit the Block Options page to learn how to take full advantage of blocks in building sophisticated Survey Flows.

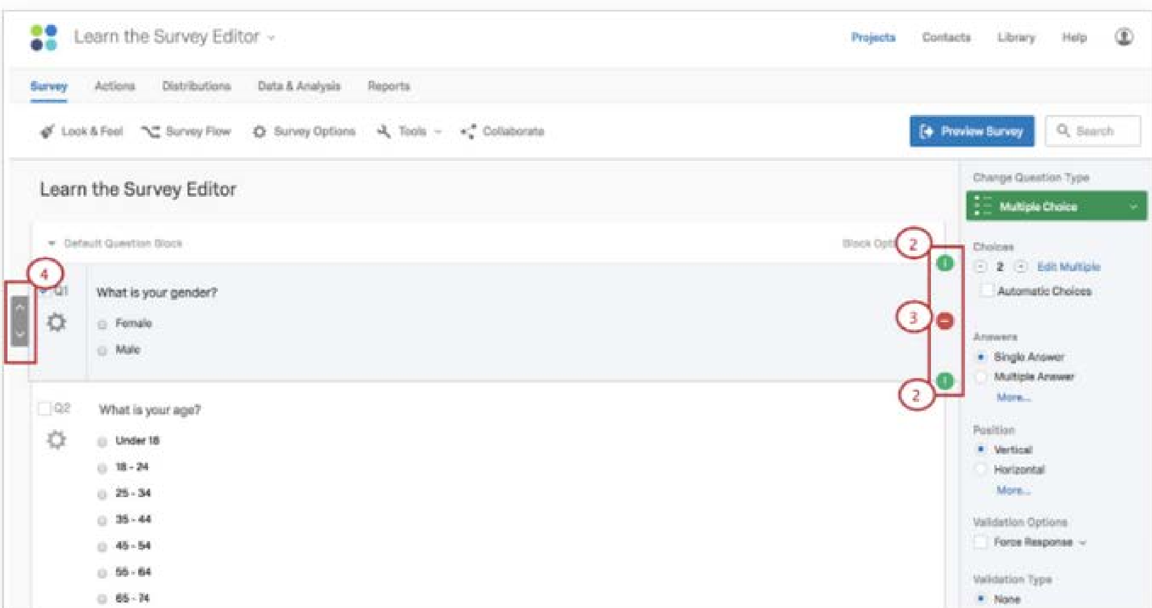
Question & Editing Pane Basics

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**.



2 To add more questions, hover over any existing question and click the green plus (+) buttons (either above or below the existing question).



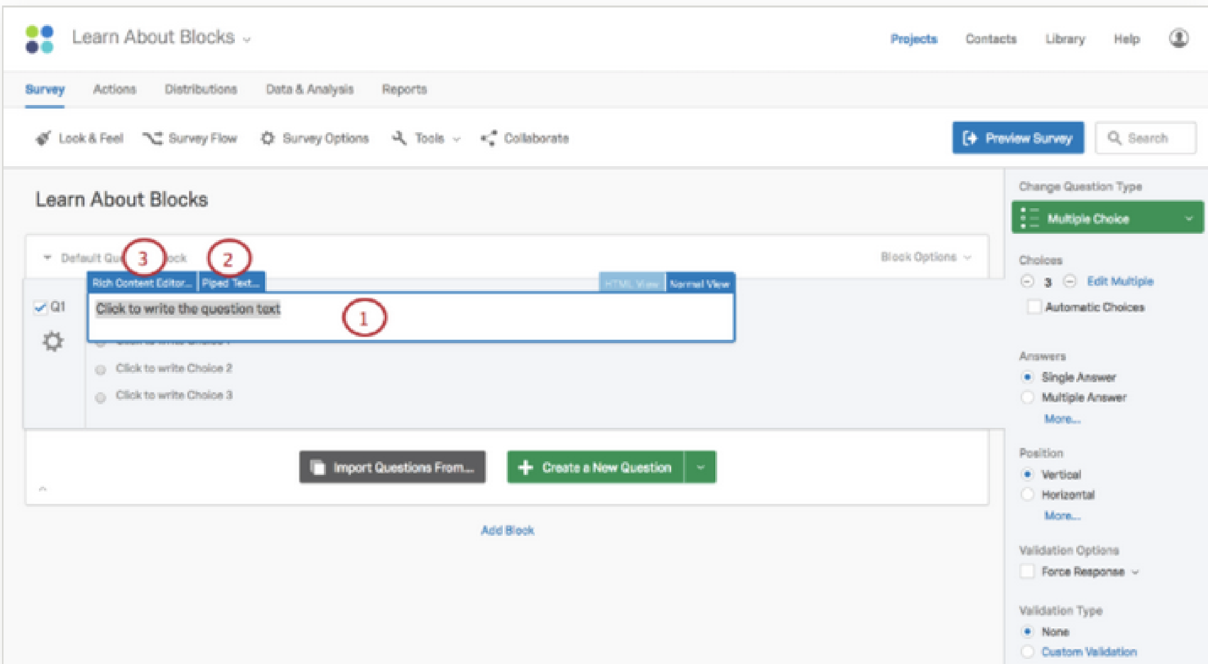
3 Click the red minus (–) sign to delete a question.

Qtip: You can recover deleted questions from the Trash at the bottom of the survey. See the Deleting Questions section for more details.

4 Move questions up or down in the survey with the question reorder controls to the left of the question editing area.

EDITING QUESTION TEXT

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



1 Click in the question text (or answer choice) text boxes to enter or edit your text.

2 Click the Piped Text 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 Rich Content Editor 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 your Survey Editor, regardless of numerical order in which you created the questions. Read the Auto-Number Questions page if you wish to re-number your questions, but that's not typically necessary.

Tip: 'Piped text' is a way to recall demographic information throughout the survey process. For example, if you would like to address your users by first name, you can use 'piped text' to link first name (if you asked your users this at the start of the survey) on subsequent questions.

CHANGE QUESTION TYPES

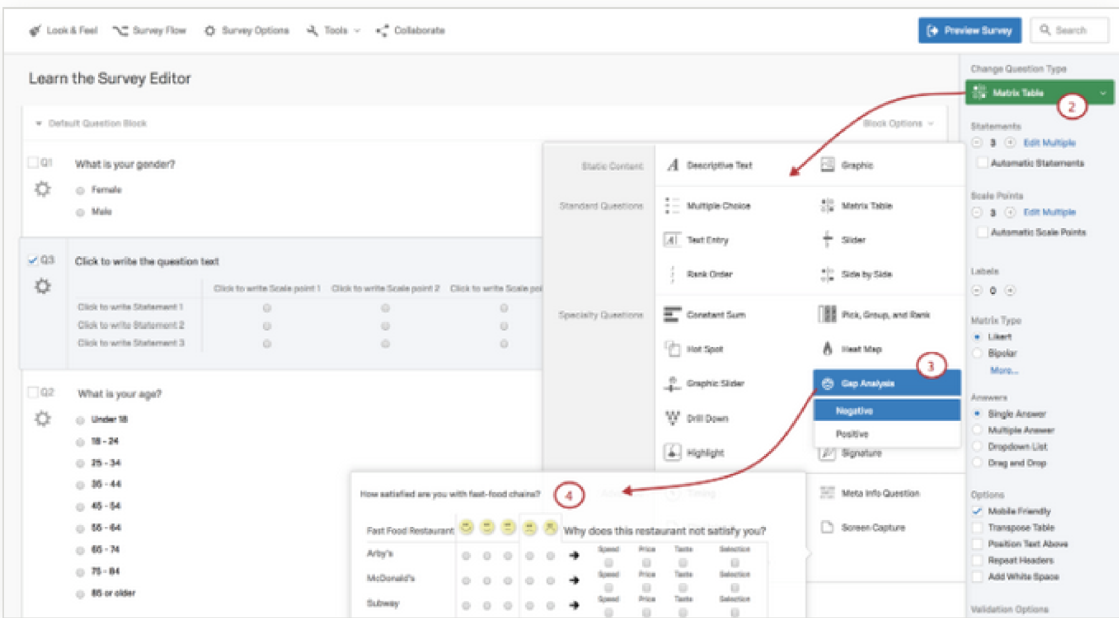
When you first click **Create Project**, a multiple choice question is inserted into your first question block by default. However, you might want to change it to another type or style of question. Use the question editing pane to choose among more than a dozen question types (e.g., Multiple Choice,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

> **Qtip:** Clicking on any question will open its unique question editing pane.

To change question types:

1 Open the editing pane by clicking on a question.

2 Click the dropdown menu under Change Question Type.



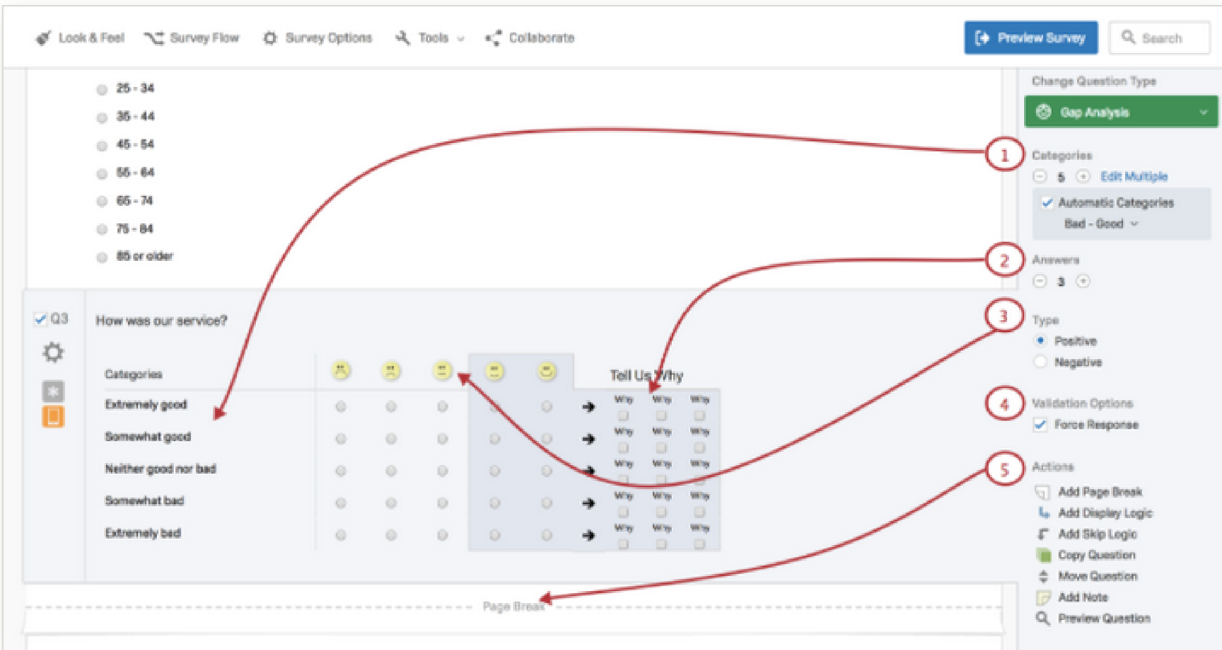
3 Pick a new question type from the list.

4 Observe that the editing pane displays samples of each question type as you scroll over them.

EDITING PANE OPTIONS

You can also use the editing pane to apply the specific options available for each unique question type (e.g., Automatic Choices, Vertical or Horizontal positioning, Force Response, etc.).

Let's demonstrate how these commands work with the Gap Analysis question type:



1 **Categories:** Decide how many options you want to display to your respondent by clicking the + or – buttons. Check **Automatic Categories** and you can have sample categories filled in automatically.

2 **Answers:** Use the + or – buttons to increase or decrease the number of possible answers.

3 **Type:** In this case, choose to emphasize either the positive or the negative emojis in your answer choices.

4 **Validation Options:** Click Force Response if you want to require a respondent to answer this question before continuing.

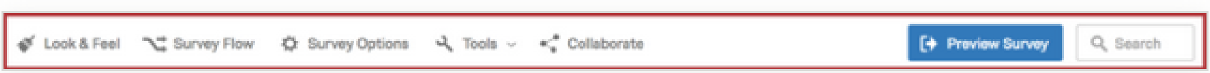
5 **Actions:** Lets you Copy, Move, and Preview questions. Add Page Break lets you break questions out on separate pages so the respondent won't see too many questions on a single screen. You can also add Display and Skip logic to the question, in addition to notes.

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 Creating Questions and Question Types support pages.

Tip: Add 'page breaks': you can accomplish this function using the right-hand tab, 'add page break.' We recommended that you break-up a survey over many pages. This will increase response rates and limit survey fatigue.

Toolbar Basics

The toolbar manages your survey's design options, security settings, and logic structures (i.e., Survey Flow). It also lets you share, test, and preview your survey.

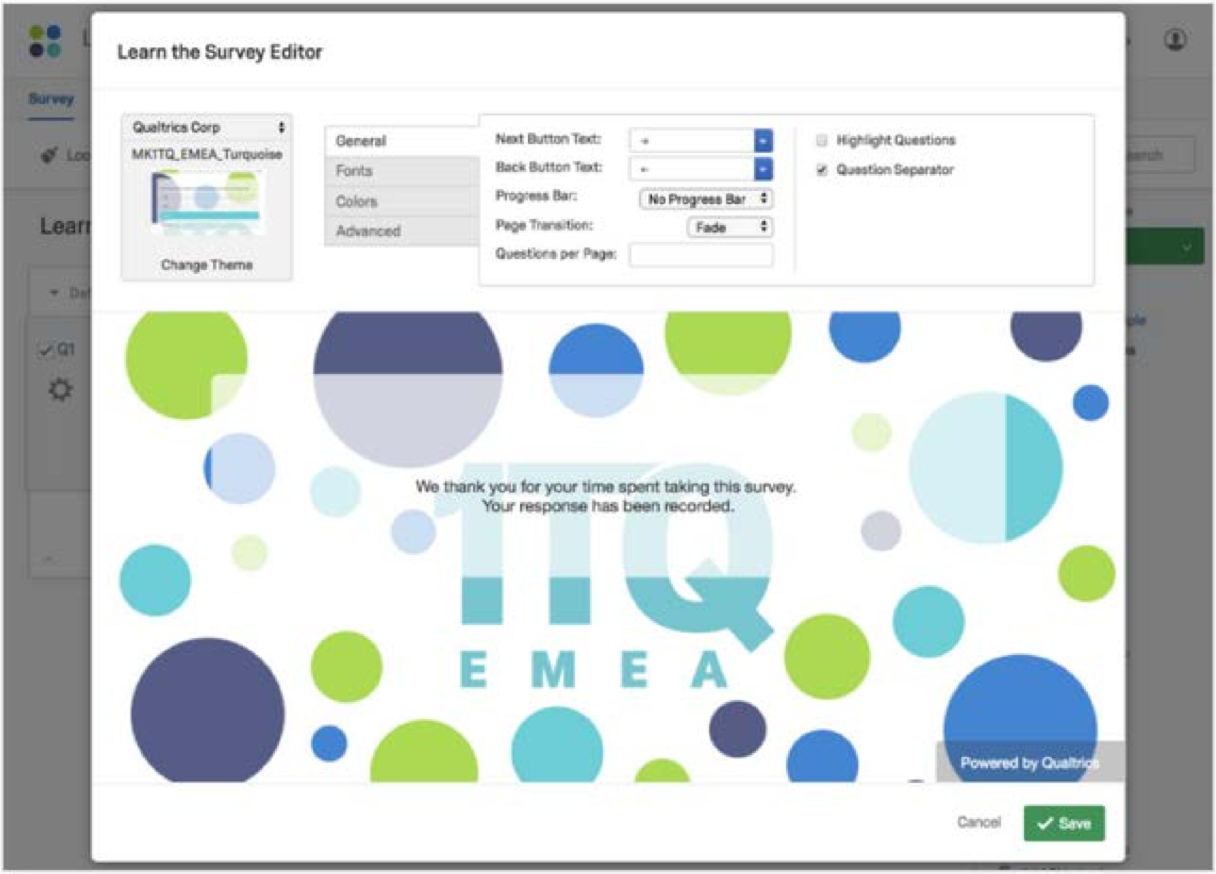


LOOK & FEEL

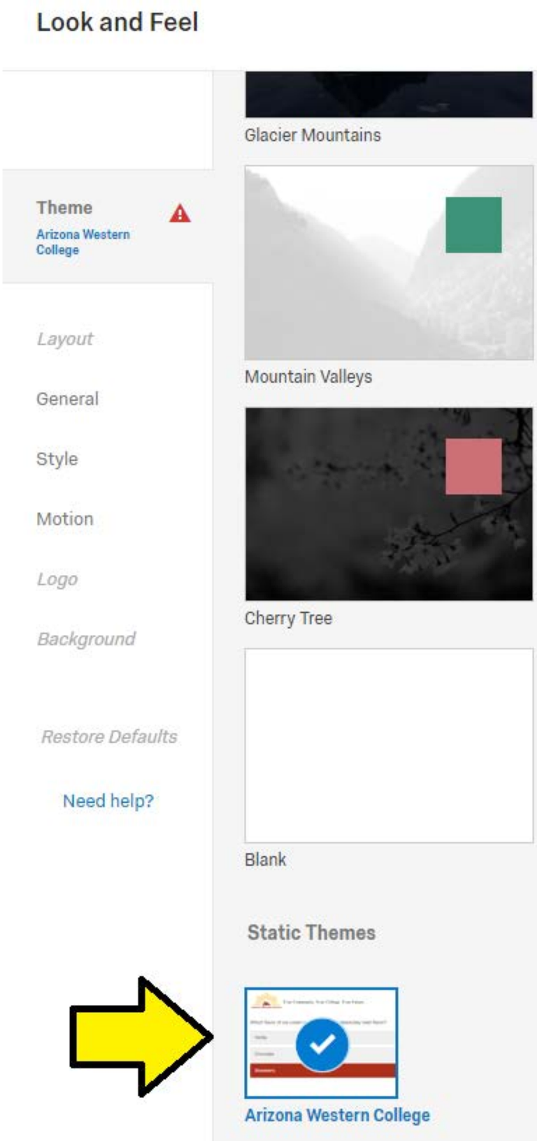
Your survey's look and feel must hit the mark. It has been proven again and again that clear, good-looking surveys get better response rates.

The Look & Feel menu opens settings that will help you design your survey, like choosing a theme, fonts, colors, and headers. Here you can apply your institution's logos and color schemes.

You can also set a variety of survey experience choices, such as displaying a progress bar or having questions highlight upon selection.



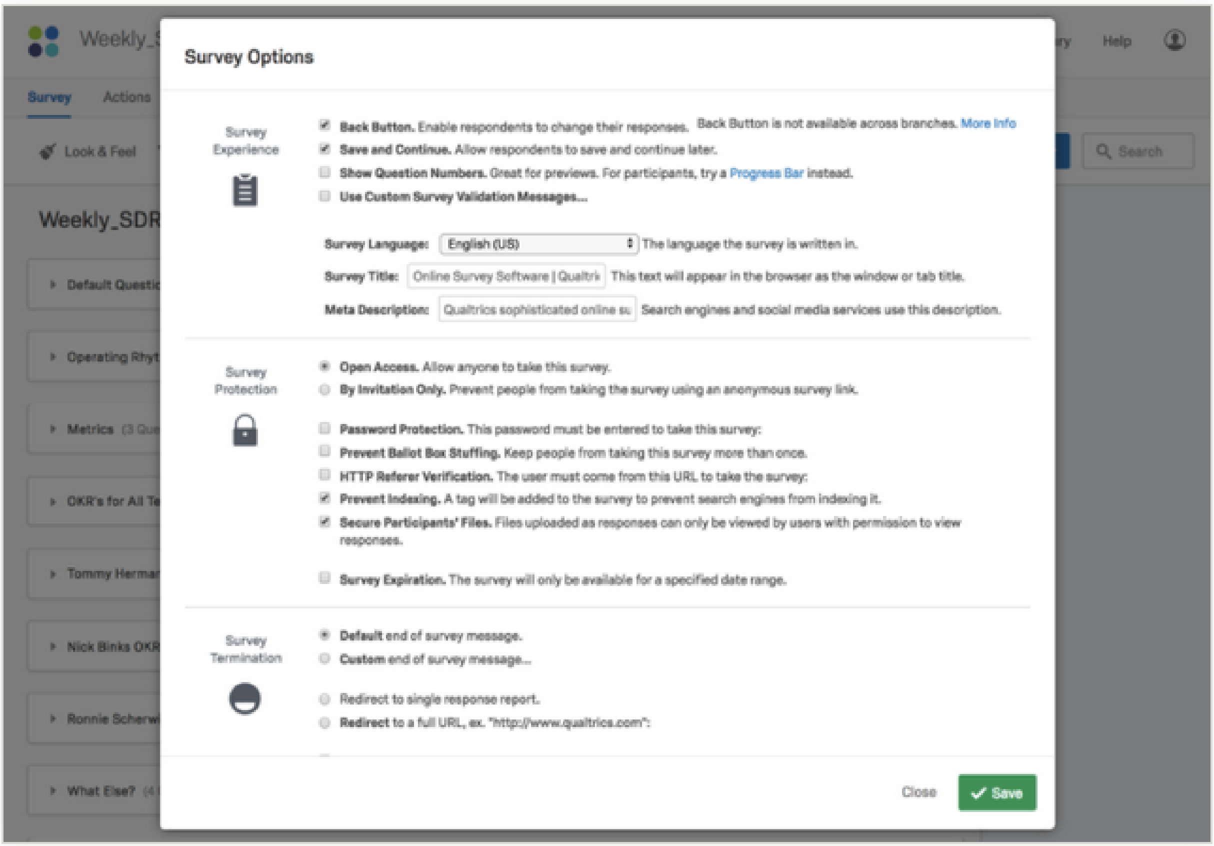
Tip: Please use **AWC static theme**. This will help standardize AWC surveys and help with marketing campaign.


Look and Feel
Theme
Arizona Western College
Layout
General
Style
Motion
Logo
Background
Restore Defaults
Need help?
Glacier Mountains
Mountain Valleys
Cherry Tree
Blank
Static Themes
Arizona Western College

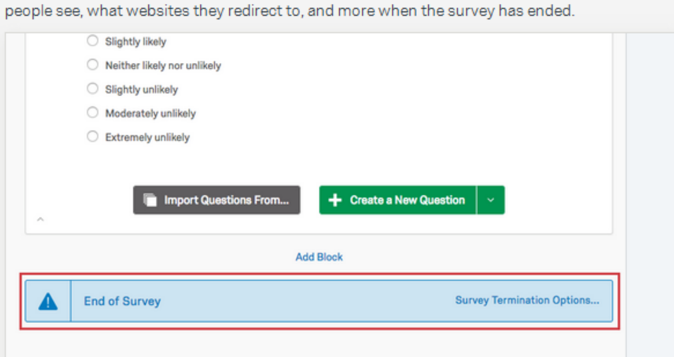
SURVEY OPTIONS

Survey Options presents a list of general settings that affect your respondents' survey experience. These settings include a command to add a back button to your survey, display a custom end of survey message, include question numbers for respondents to see, and more.

You can also set Survey Protection settings. For example, you can stop respondents from taking a survey more than once with the Prevent Ballot Box Stuffing option and set date and time ranges for Survey Expiration. You can customize the Survey Experience too, such as changing a survey's language settings.



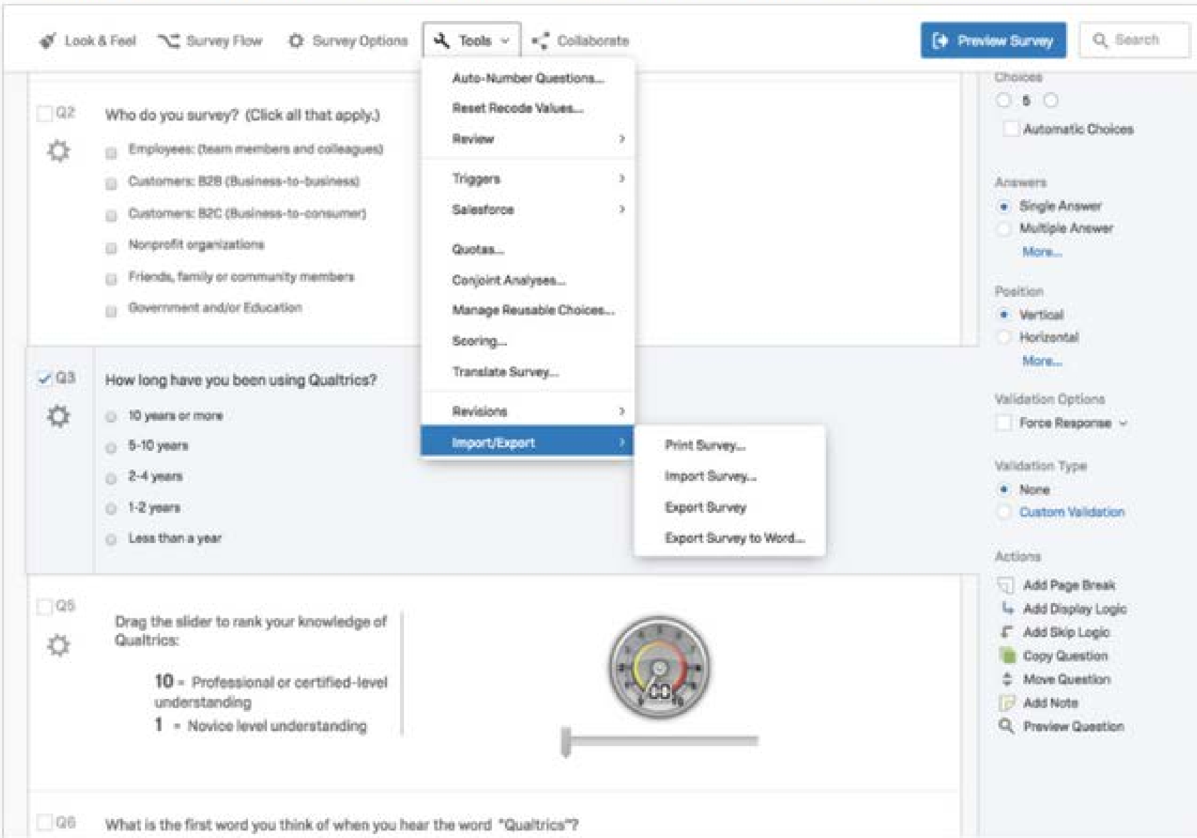
Qtip: You can also navigate to the Survey Termination Survey Options by clicking the blue **End of Survey** element at the bottom of the survey editor. This allows you to edit what messages people see, what websites they redirect to, and more when the survey has ended.



TOOLS

The Tools dropdown menu contains a variety of advanced survey features. These features include options like Auto-Number Questions, Email Triggers, Quotas, Translations, Scoring, and more.

Tools also contains specific survey building aids, like stripping formatting, generating sample test responses for testing your surveys and exporting your survey to other formats.



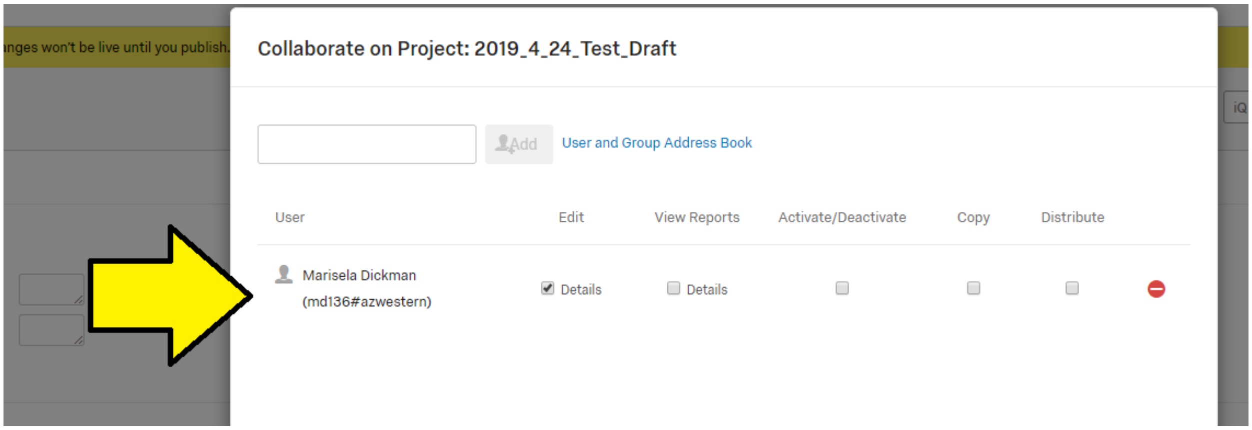
Tips

- 'Auto-Number Questions:' for use to keep track during survey drafting. This will automatically number all questions within a survey, disregarding the order in which a question was created.

- 'Reset Recode Values:' Sometimes you'll want to reset all of your recode values. Maybe you copied your survey from an old one and don't want the same recodes, or maybe you made many edits you don't like and want to start over. If you go to 'Tools' and select 'Reset Recode Values,' your recode values will be removed, and your data will calculate based on default choice IDs. For example, your first choice in a question will usually value 1.

- 'Collaborate:'

- We recommend you 'collaborate' your surveys with Arturo Magaña (arturo.magana@azwestern.edu). Check-mark 'edit,' 'view reports,' 'activate/deactivate,' 'copy,' and 'distribute.' This will allow Arturo to view, edit, and offer clear advice and edits on your surveys.

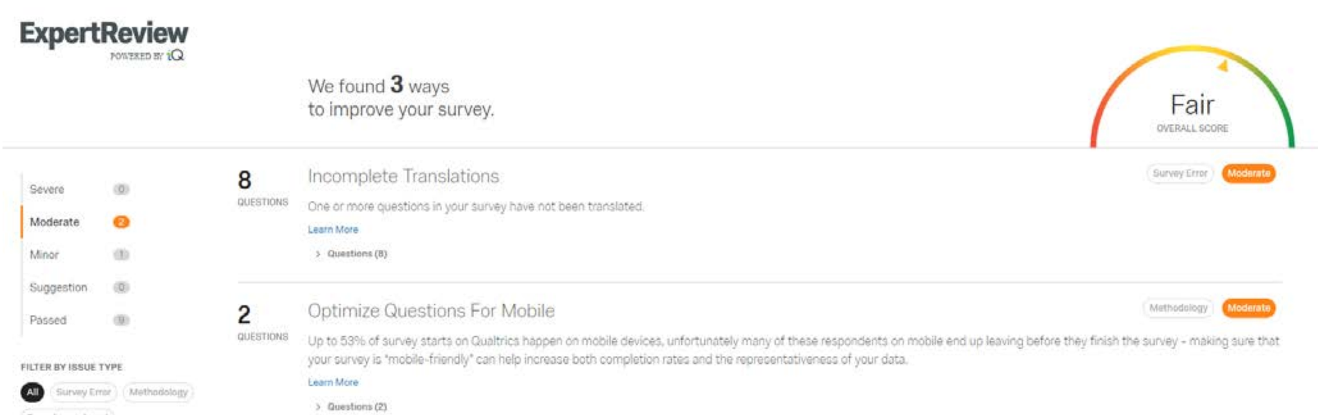


Tips: 'Review' offers many tools. Of which these are particularly important:

- **'Spell Check:'** we recommend you use this tool before you publish your survey.

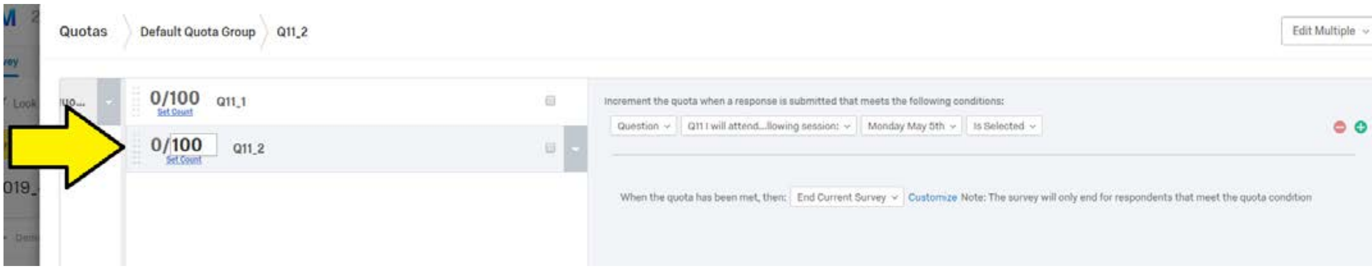
- **'Check Survey Accessibility:'** we recommend you use this tool and make any suggested edits before publishing. This tool will help make surveys accessible to people with disabilities and mobile users.

- **'Analyze Survey:'** this tool will provide you with an overall score on how accessible your survey is. Please follow any tips and edit accordingly.



Tip: 'Quotas:' for use when you'd like to only field responses from a certain number of participants. To access:

- Navigate to ‘Tools’ + ‘Quotas ‘+ ‘Add A Quota’ + ‘Simple Logic Quot’a + ‘Set Count’ (e.g. 100 participants) + Question + Select question which the quota will compile + set conditions:

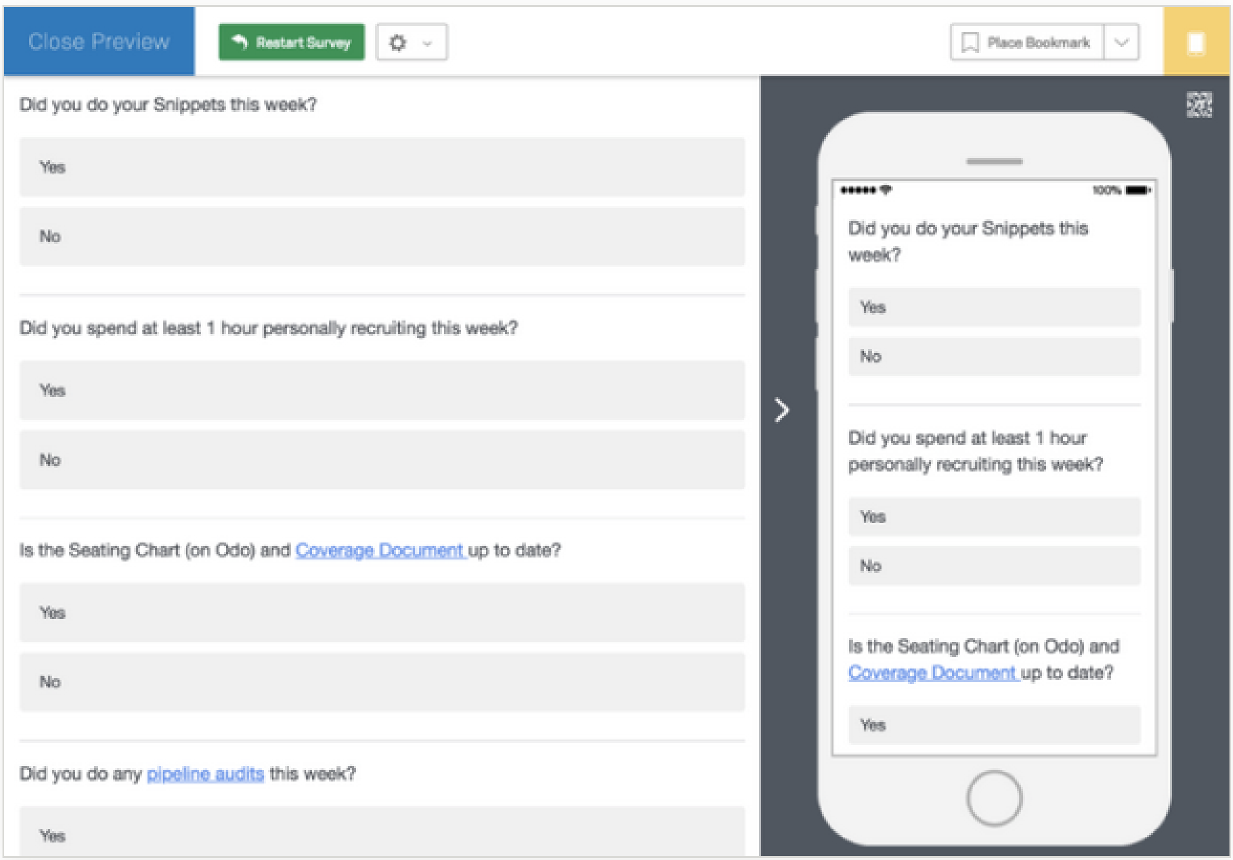


Tip: ‘Import/Export Survey:’ for use to import/export. Export survey to a Word Doc, if you’d like to print out your survey and provide to participants in hard-copy form.

PREVIEW SURVEY

The Toolbars' Preview Survey feature lets you view and experience your survey just as your respondents will. This preview provides both computer screen and mobile device preview options.

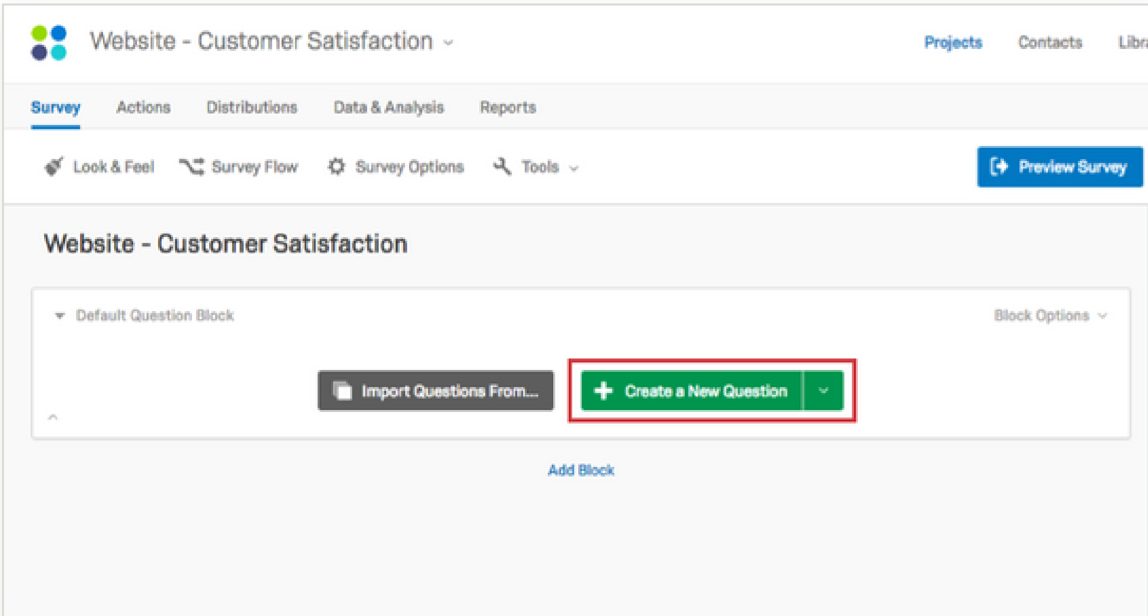
Previewing is essential. Think of the Preview option as a debugging tool that helps you find all the potential mistakes, logic errors, and readability issues you may have missed when you were creating your survey.



Creating Questions

How to Add New Questions

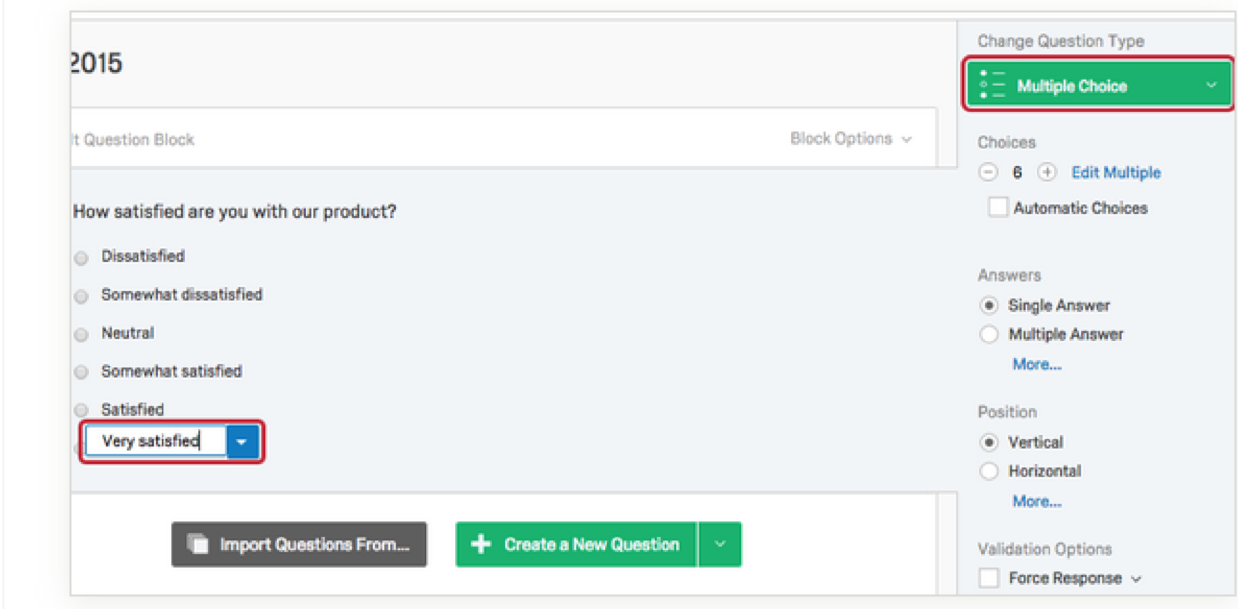
1 Click **Create a New Question**.



Qtip: Questions are numbered in the order they are created, not the order they appear in the survey. You can renumber your questions by using the Auto-Number Questions feature.

2 If desired, change the question type by clicking the green dropdown labeled **Change Question Type** and then select your desired question type.

3 Click on any text to begin editing your question or choices.



To add another question, you can hover over an existing question and click the green plus (+) buttons (either above or below the existing question), or you can select **Create a New Question** again.

> !
>
> Warning: Be careful to finish all your editing before you distribute your survey! Changing a question's type after you've started collecting data may invalidate previous responses to that question.

> !
>
> **Attention:** The Edit Multiple feature is disabled as soon as you collect data on your survey. This is to prevent invalidation of your data. If you copy a survey where this feature has been disabled, the copy will also not contain the Edit Multiple feature.

Deleting Questions

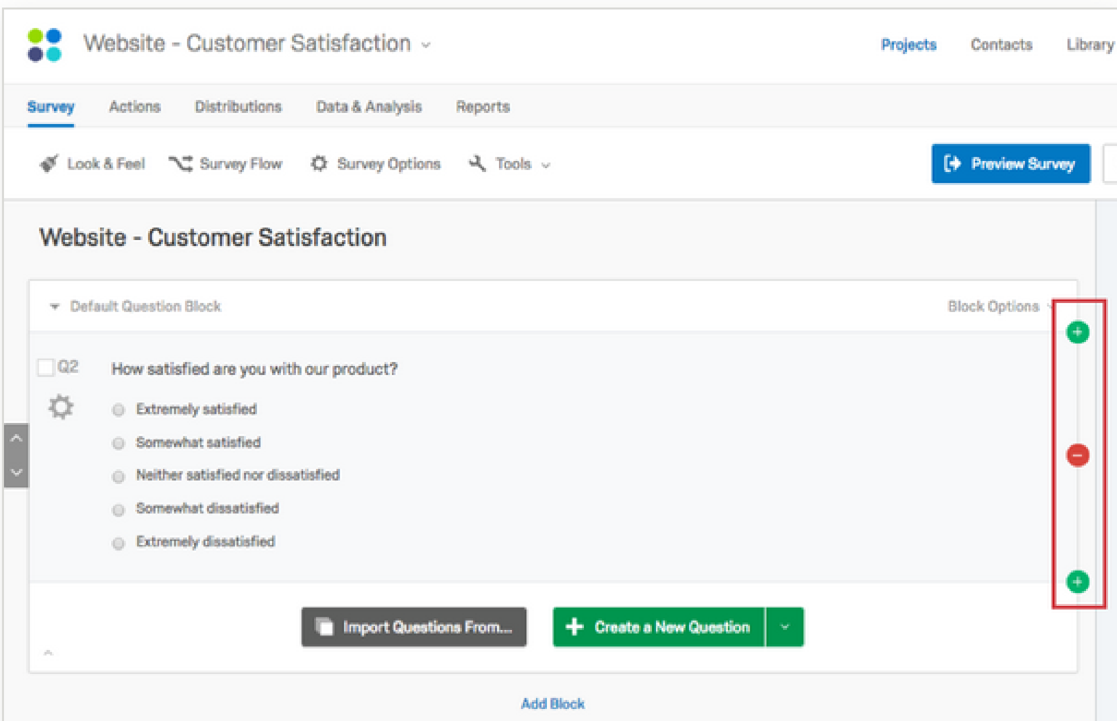
If you no longer need a question, it can be deleted. A deleted question will be stored in your Trash at the bottom of the Survey tab screen until permanently deleted.

! Warning: If your survey has collected responses, deleting a question will remove all of the data associated with that question. View our pages on Testing and Editing an Active Survey and Saving and Restoring for more information.

TO DELETE A QUESTION

1 Move your mouse over the question.

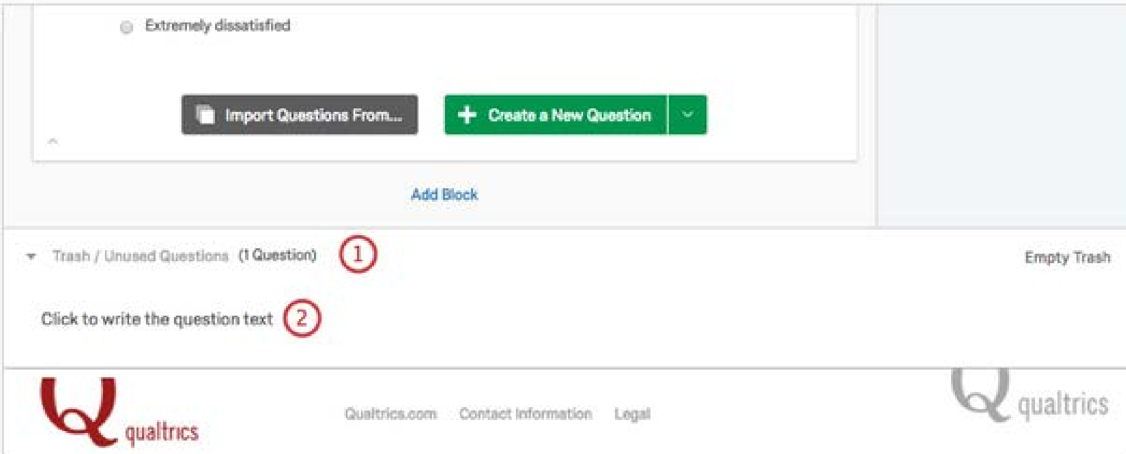
2 Click the red minus sign that appears to the right.



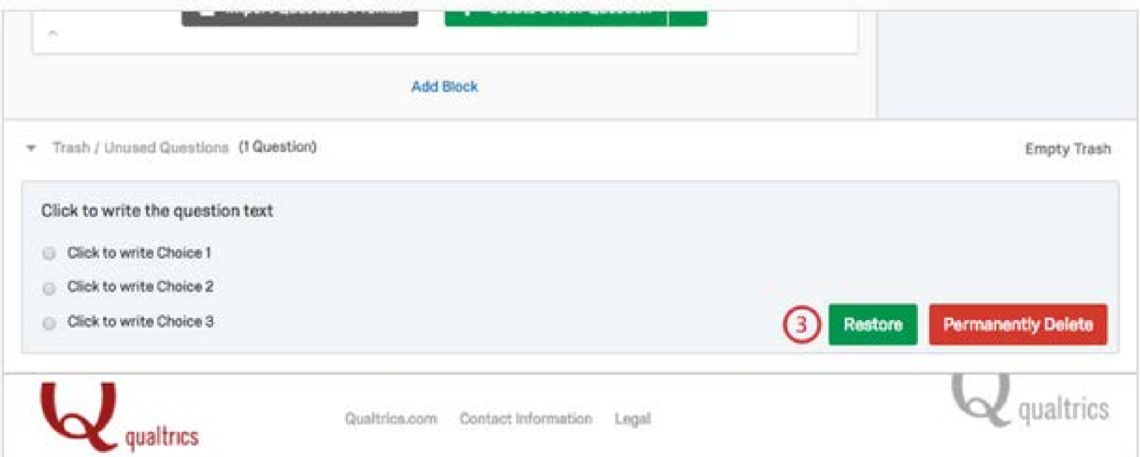
TO UNDELETE A QUESTION

1 Click **Trash/Unused Questions** located at the bottom of your survey.

2 Select the question you would like to undelete.

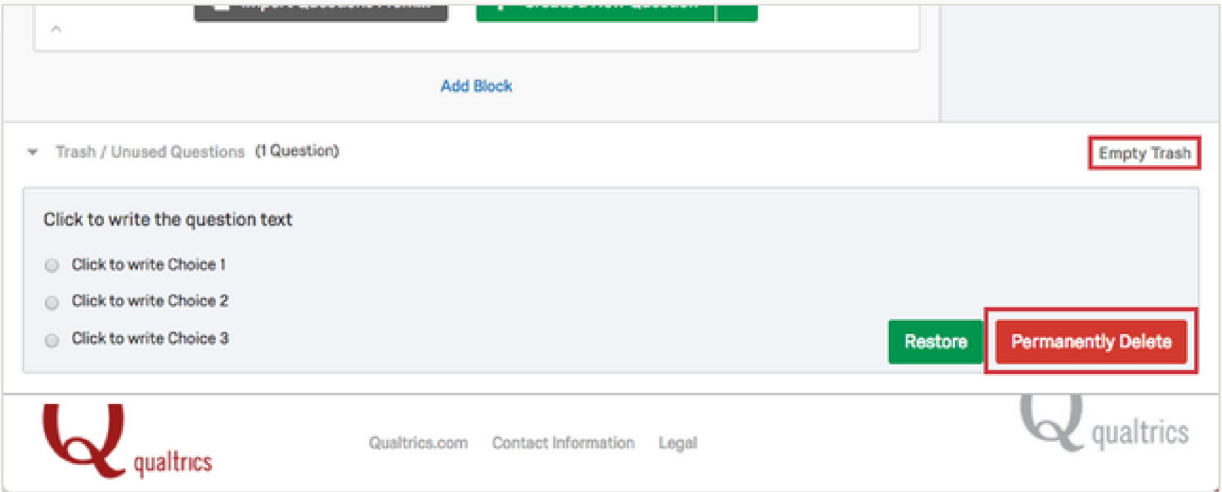


3 Click **Restore**.



PERMANENTLY DELETING A QUESTION

If you would like to permanently remove a question from your trash, select the question and then click **Permanently Delete.** To finalize the deletion, refresh your account. To permanently delete all questions from your trash at once, select **Empty Trash.**

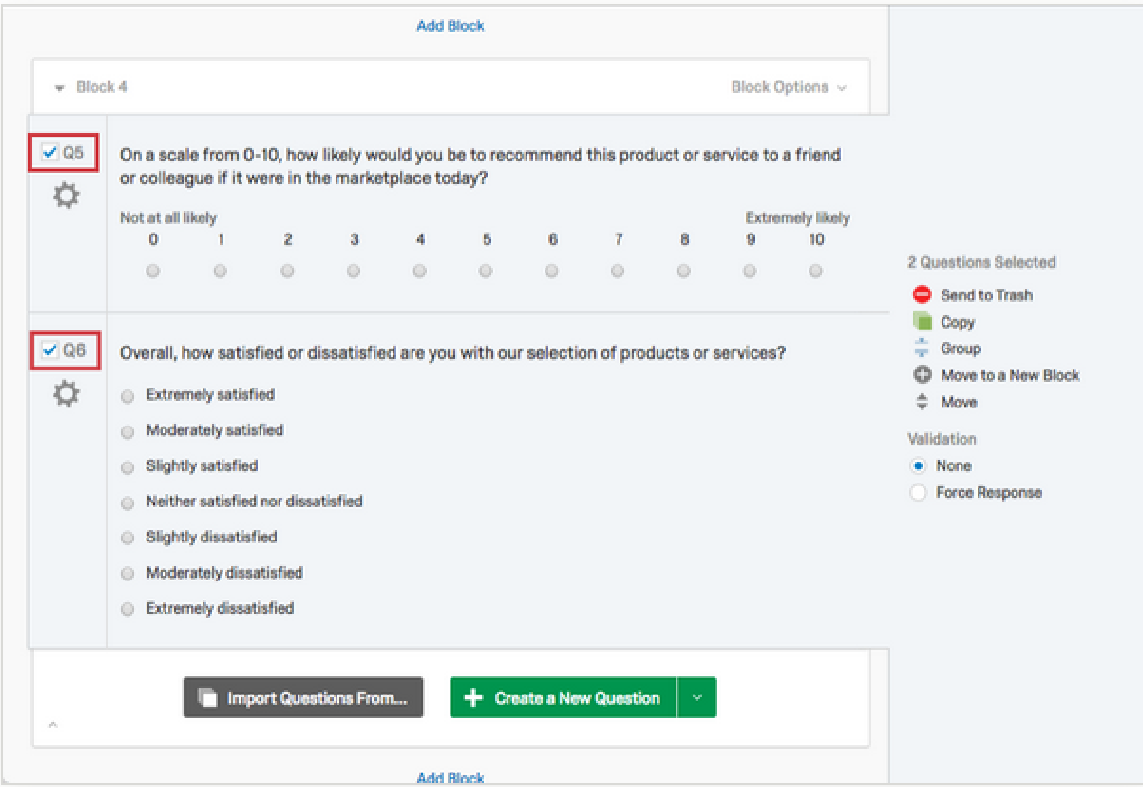


Editing Multiple Questions

Once you have selected multiple questions in your survey, a new menu will appear allowing you to delete, copy, and move questions in addition to other options.

You have three ways to select multiple questions:

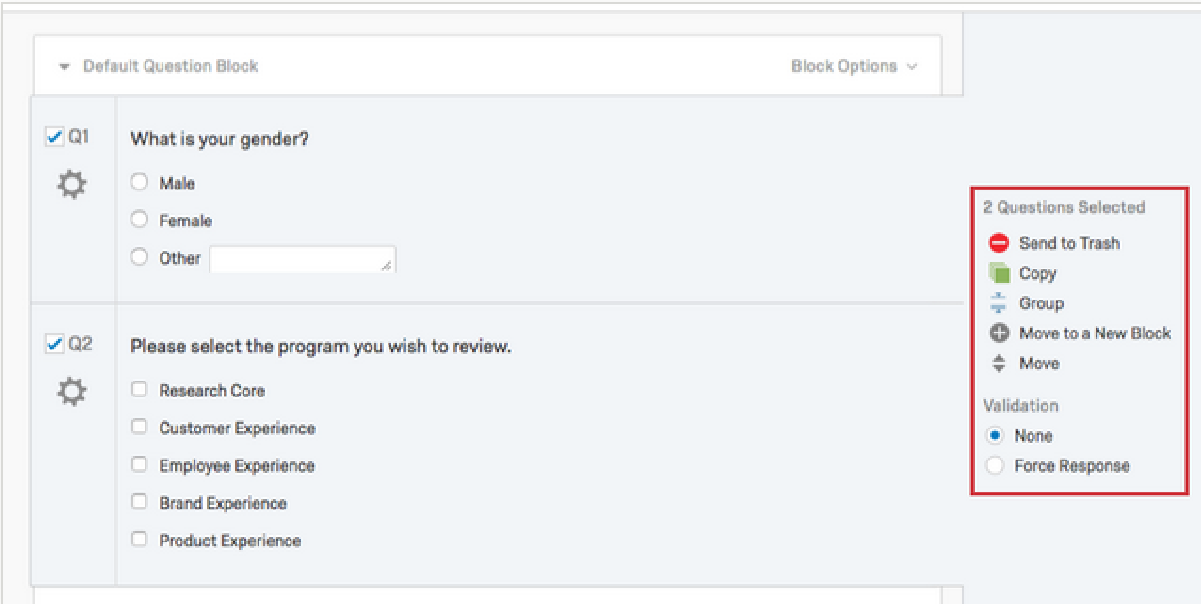
- Select the checkboxes of the questions you want to group



- Hold `Ctrl` and click the questions you want to group

- Click the first question you want to select, hold `Shift`, and then click the last question you want to select. This will select both the questions you clicked and all the questions in between.

Once you have selected multiple questions, a list of group actions will appear to the right of the questions.

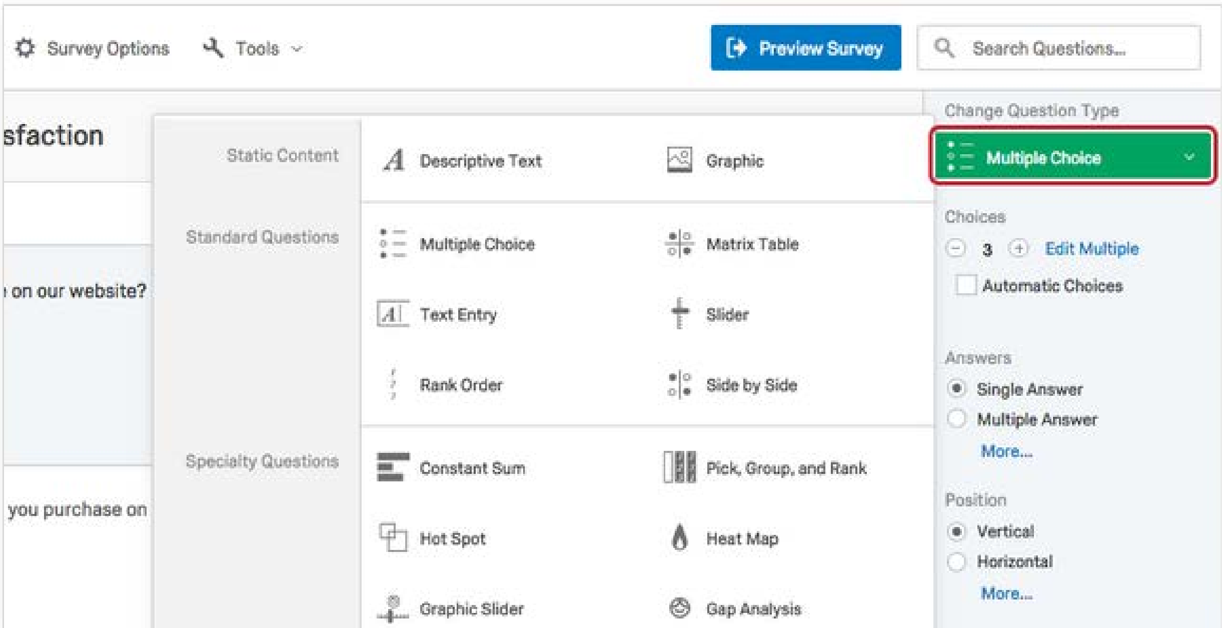


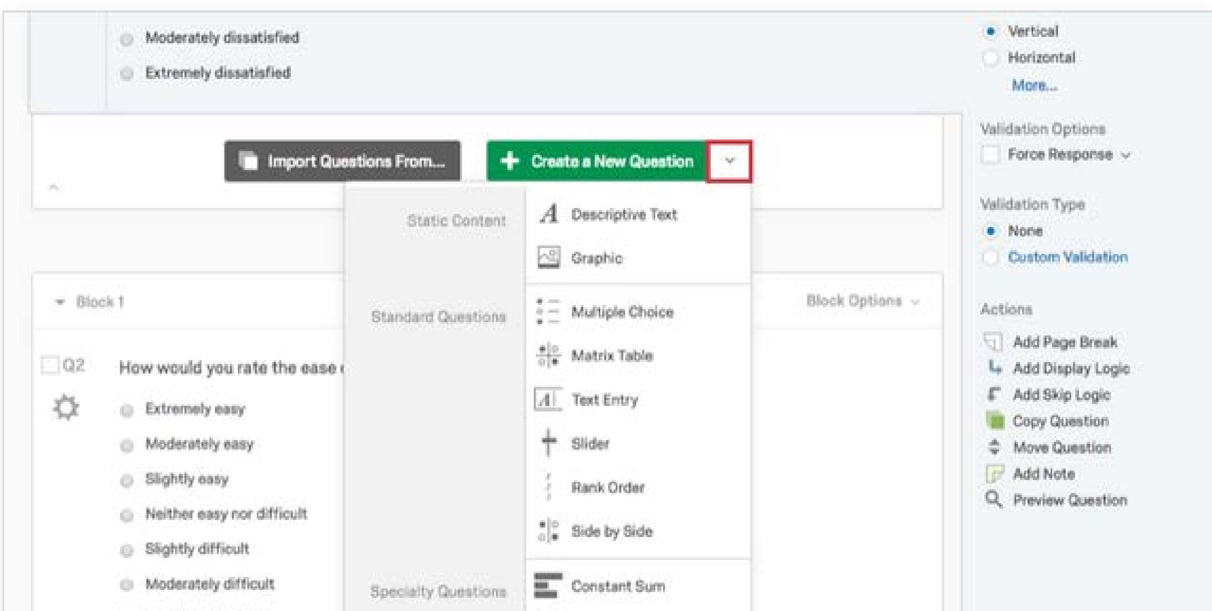
GROUP ACTIONS

- **Send to Trash:** Delete selected questions. Deleted questions will be stored in your Trash until permanently deleted.
- **Copy:** Copy all selected questions at once. Copied questions are placed below the currently selected questions.
- **Group:** Pull questions that are spread out across the survey into one location. Grouped questions are pulled to the location of the last selected question.
- **Move to a New Block:** Moves selected questions into a newly created block placed at the end of the survey.
- **Move:** Relocate all selected questions to a designated area in the survey.
- **Validation:** Enable Force Response on all selected questions.

Question Types and General Tips for Use

Each of the question types described below can be added to your survey by either (1) using the **Change Question Type** dropdown menu to change an existing question or (2) clicking the dropdown arrow next to **Create a New Question** to add a new question.





Static Content

These questions do not require any action from the respondent. Information in these questions is merely displayed to respondents.

Descriptive Text: Descriptive Text questions can be used to add an introduction or instructions to your survey, or wherever you need to display content to the respondent, without asking for feedback.

Graphic: Graphic questions can be used to display an image to your respondents without asking for feedback.

Standard Questions

These question types are some of the most commonly used. They are a simple and effective means of gathering information.

Multiple Choice: Multiple Choice questions form the basis of most research. They can be displayed as a traditional list of choices or as a dropdown menu, select box, etc.

Text Entry: Text Entry is used to gather open-ended feedback from respondents. These responses can be lengthy essays, standard form information such as name and email address, or anything in between.

Rank Order: Rank Order is used to determine each respondent's order of preference for a list of items.

Matrix Table: Matrix Table is used to collect multiple pieces of information in one question. This type provides an effective way to condense your survey or to group similar items into one question.

Slider: Sliders let respondents indicate their level of preference with a draggable bar rather than a traditional button or checkbox.

Side by Side: Side by Side questions let you ask multiple questions in one condensed table and provides an effective way of shortening your survey while gathering the same amount of data.

Tip: Limit the use of '**Matrix Table,' 'Slider,' and 'Side-by-Side' questions**, as these questions are not accessible and difficult to comprehend for many people. Also, they are not particularly accessible on mobile devices.

Specialty Questions

These questions are used in more specific situations and gather more targeted data.

Constant Sum: Constant Sum collects numeric data and displays a sum to the respondent. This type is often used for allocation assessments, such as defining how you spend your time in different activities.

Hot Spot: Hot Spot allows respondents to interact with regions of an image. This type is often used in usability testing and concept testing.

Graphic Slider: This variation of the Slider question has respondents use various graphic options, such as changing a frown to a smile or choosing a grade, to indicate their level of preference.

Drill Down: Drill Down helps respondents choose from a long list by starting with a broad category and then honing in on the choices that are relevant to the respondent.

Pick Group and Rank: Pick Group and Rank is used for sorting activities. Respondents place items into groups and have the option to rank the items within the group.

Heat Map: Heat Map lets respondents click a specific point on an image. In your data, you can see a heat map that shows which parts of the image were most often clicked. This type is often used for web development (e.g., eye flow analysis) and advertisement testing.

Gap Analysis: This variation on the Side by Side question measures satisfaction and then detects why any "gaps" in satisfaction exist.

Net Promoter® Score: NPS® tracks customer loyalty with one simple, standardized question: "On a scale from 0-10, how likely are you to recommend our company to a friend or colleague?"

Highlight: The Highlight question type allows you to present survey participants with an interactive text sample. Participants can select words from the text and evaluate using criteria you choose. For example, whether they like or dislike the selected text.

Signature: The Signature question type presents survey participants with an entry box where they can draw their signature. On a desktop, they can use their mouse, and on a mobile device they can use their finger.

Tip: Limit the use of '**graphic-slider' question**, as this question type is not accessible.

Advanced

These questions go above and beyond standard survey insights; they allow you to obtain detailed information about your respondent and their interaction with your survey, often without requiring any action from the respondent.

Example: You can use the Timing question to keep track of how long participants view one page of your survey. This can be done automatically without requiring any added action from the respondent.

Timing: This hidden question is used to time—as well as limit—how long participants spend on a page of the survey.

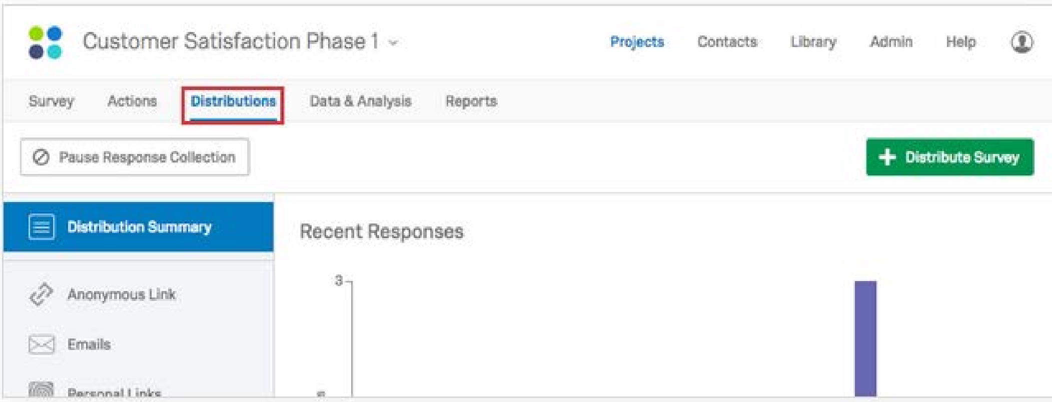
File Upload: File Upload is used to collect information beyond the survey questions, such as user-uploaded photos or documents. The File Upload question type is an add-on feature not included in the standard Qualtrics license. Please contact your Qualtrics Account Executive for more information.

Screen Capture: Screen Capture allows respondents to attach a screenshot of the site they are viewing when taking a survey through a Website / App Feedback (Site Intercept) project. This question type is only available to users that have purchased access to Website / App Feedback projects.

Captcha Verification: Captcha Verification is used to ensure that your respondents aren't robots. This question has participants respond to a challenge to verify they are real humans.

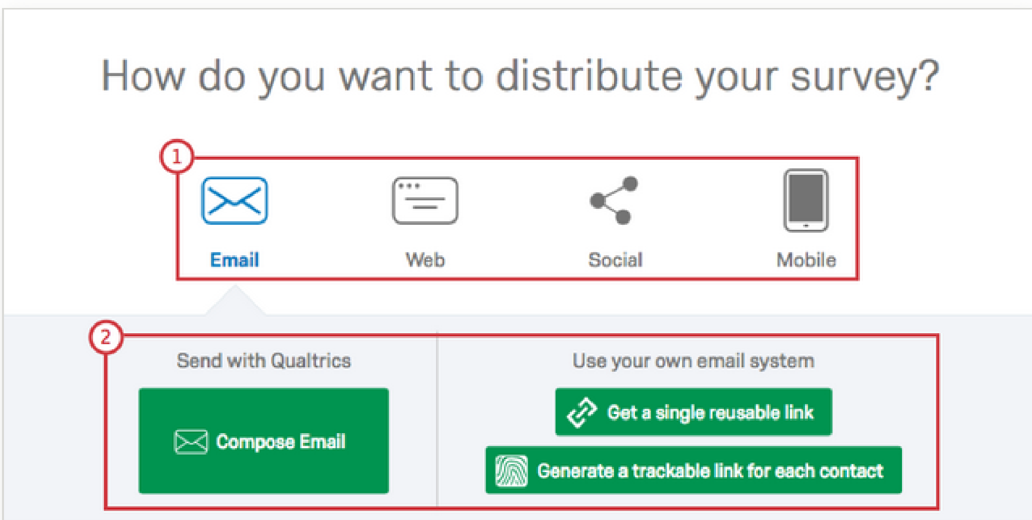
Meta Info: Meta Info reports the public information about the respondent's computer, such as their browser and operating system. The question requires no respondent action and is completely hidden.

Distributions Page Basic Overview



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.



1 Channels: Choose from Email, Web, Social, or Mobile.

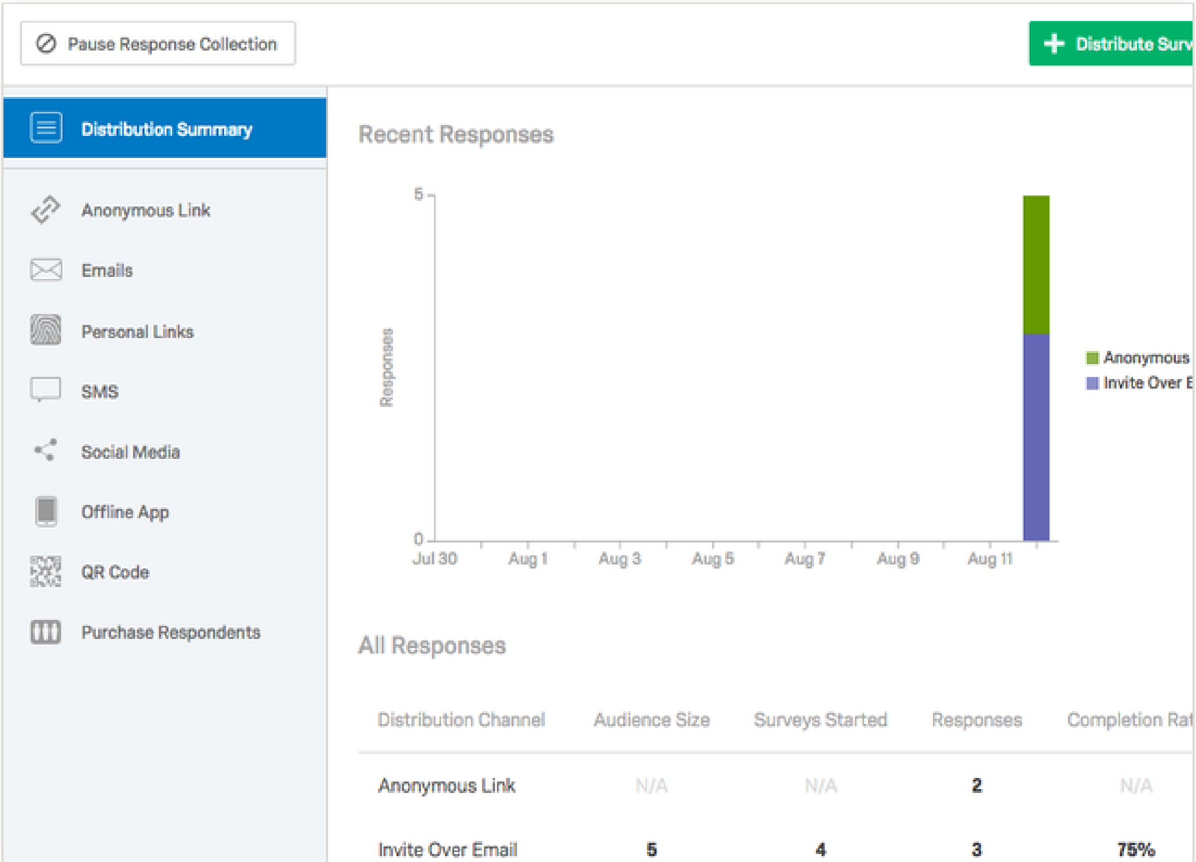
2 Methods: Pick from the available invitation options (e.g., email invites can be sent via the Qualtrics mailer or through your own email system). The options available here will change depending on the channel you have selected.

Qtip: You can use several distribution methods for the same project.

Visit the Collecting Responses page for step-by-step instructions on how to distribute your survey and to start gathering responses.

Distribution Summary Basics

After you select your initial channel and method, Qualtrics will reveal a Distribution Summary so you can track your response metrics.



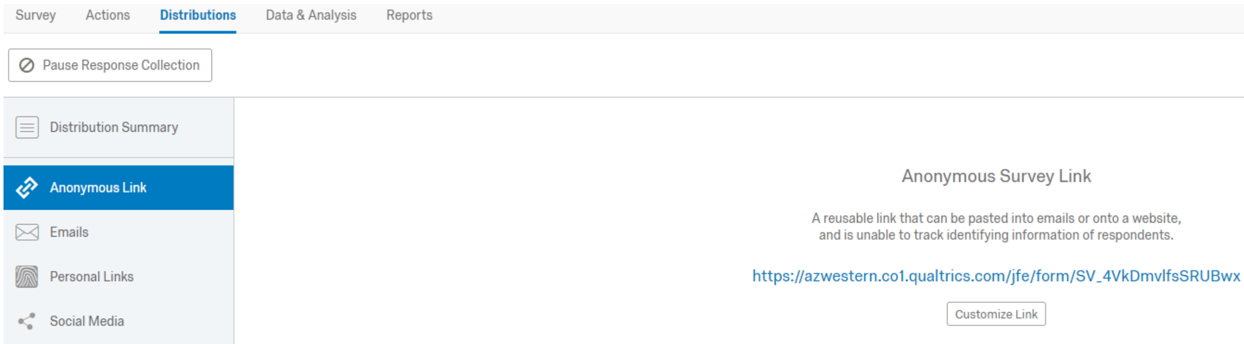
The Distribution Summary will show you, in real time, all of the responses that have been collected. Responses are broken down by channel with an interactive graph and a table displaying your response trends.

These metrics can help you spot troubles early and adjust quickly to keep your research on track. The summary can also help you decide if you have sufficient data to stop collecting data.

> Qtip: To learn more, visit the Distribution Summary page.

Customizing your Email Message

Tip: the simplest way to distribute is through an **'anonymous link**.' You can send this link out through your AWC email—this will increase response rates, as participants will more than likely recognize an AWC email account. If you decided to compose an email through the Qualtrics platform, there is a possibly that some of your emails will be filtered by your participant's spam filters.



You can share this link on various platforms. You can invite participants to your survey through your AWC email or institutional social media pages. If you decided to share your survey link through an email, we recommend you follow these tips when creating your email:

Invitation Message/Email Survey Link

Subject line

Avoid using the words, "free," "help," "percent off," "survey," and using exclamation points and all caps.

Message Body (Example)

Clearly states survey purpose and why participant was selected

Uses 50 words or less

Specific to respondent

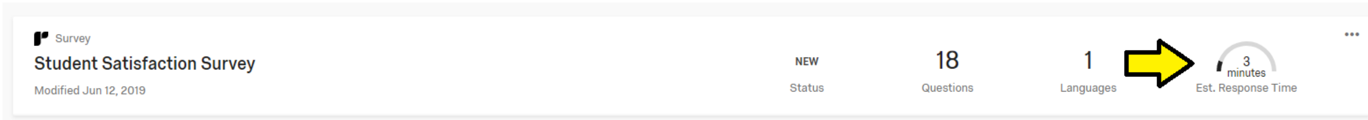
Susana,
We at AWC want to hear from you! We are conducting research on student perceptions on our CAMP Program and want to hear from your experience.
The survey will only take 3 minutes of your time. We thank you for your time.
If you have questions, contact John Smith, js@azwestern.edu.

Thanks them in advance for their time

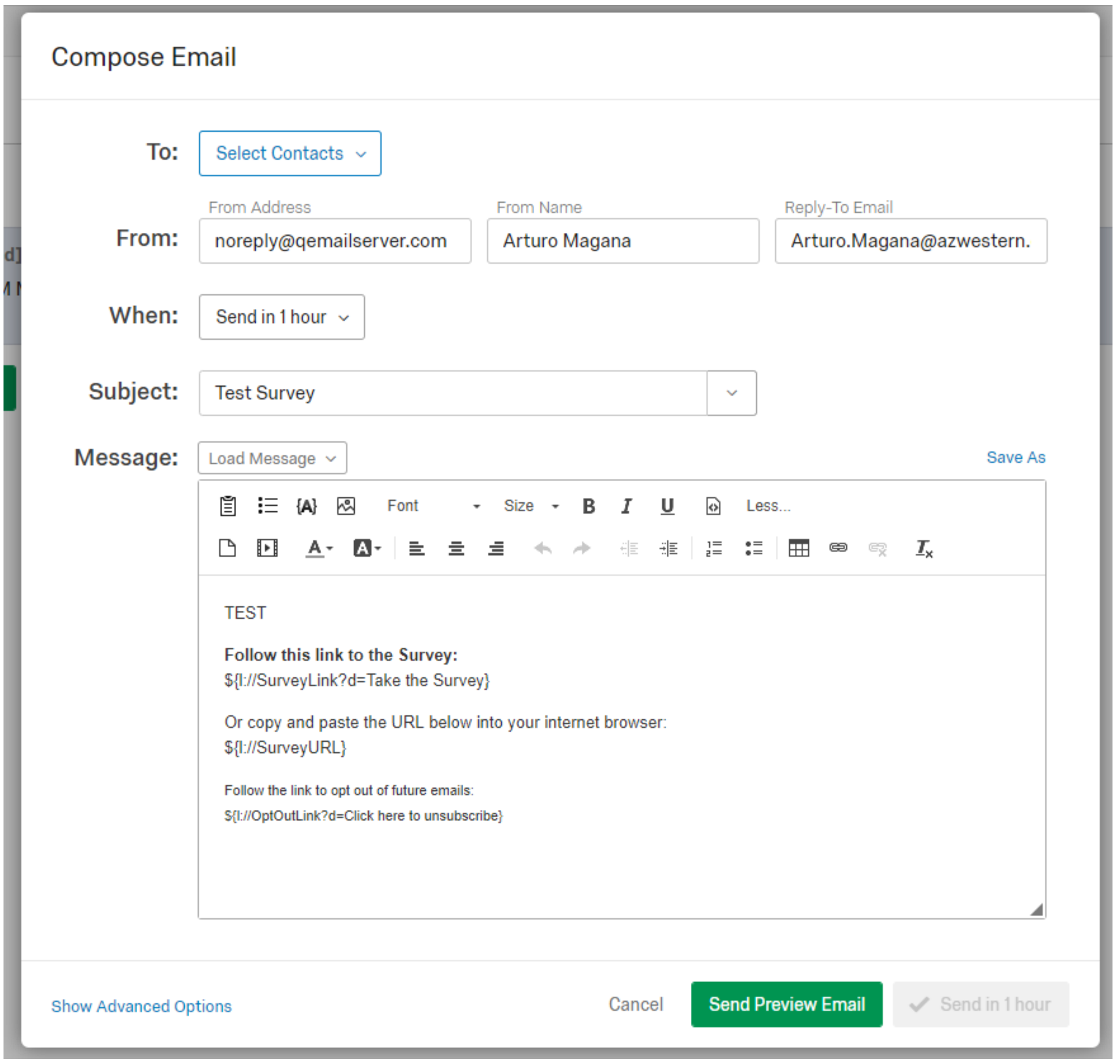
Provides contact info

Provides realistic time estimate

Qualtrics provides estimated response times on the projects page



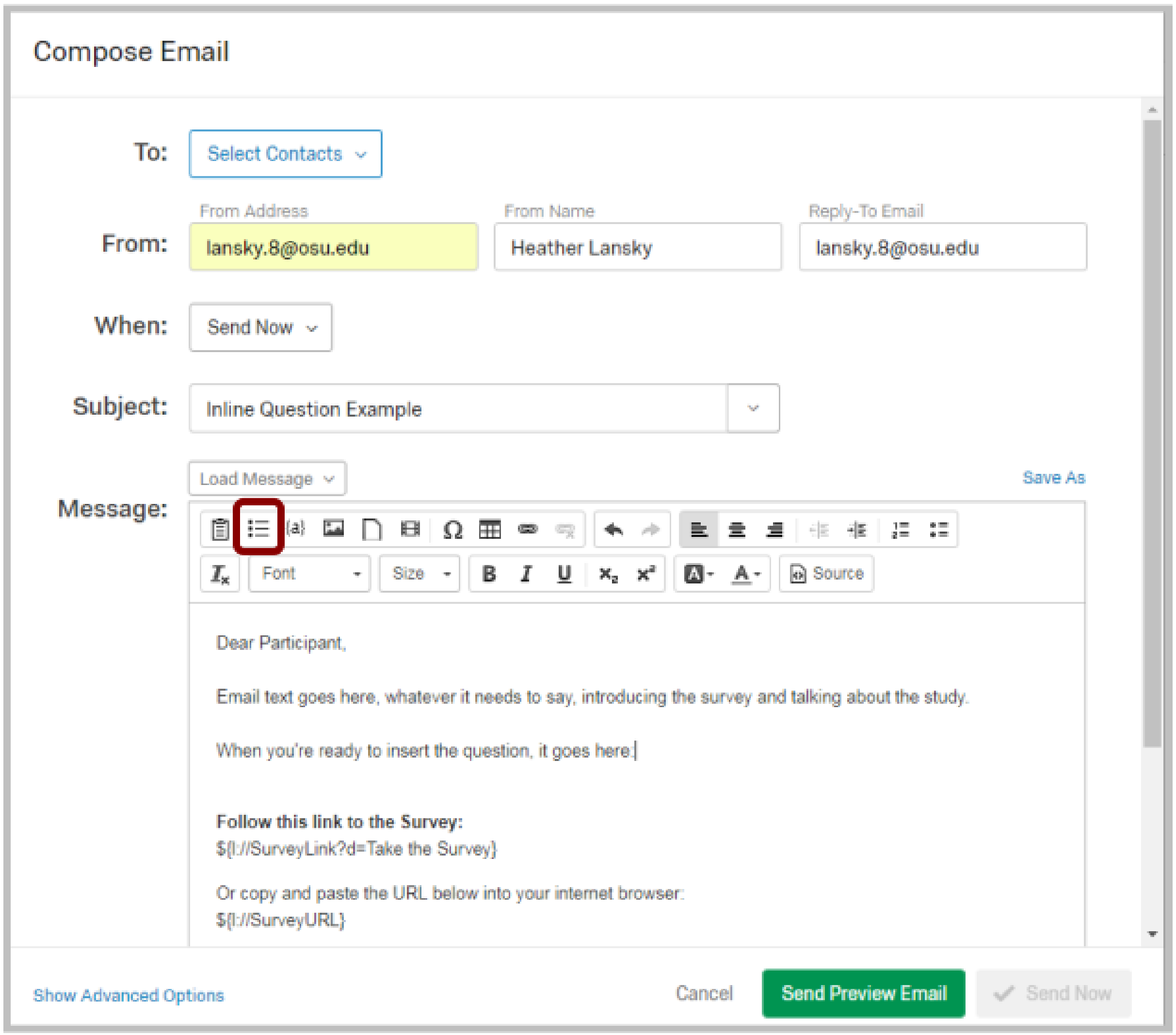
Tip: You can then provide the survey link below your message. You can also compose an email through the Qualtrics platform, by clicking on the emails tab on the left hand-side of your screen on the distributions page.



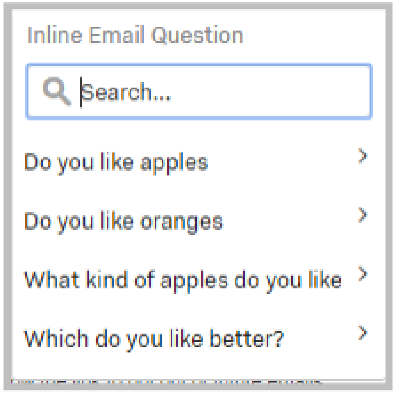
Tip: Please remember to update the '**reply-to-email' field**—you will want to include your AWC email here. This way, your participants can contact you with any questions. You can add a question from your survey to your email body—this will increase participant rates.

Part 2 - Adding the Question to the Email Body

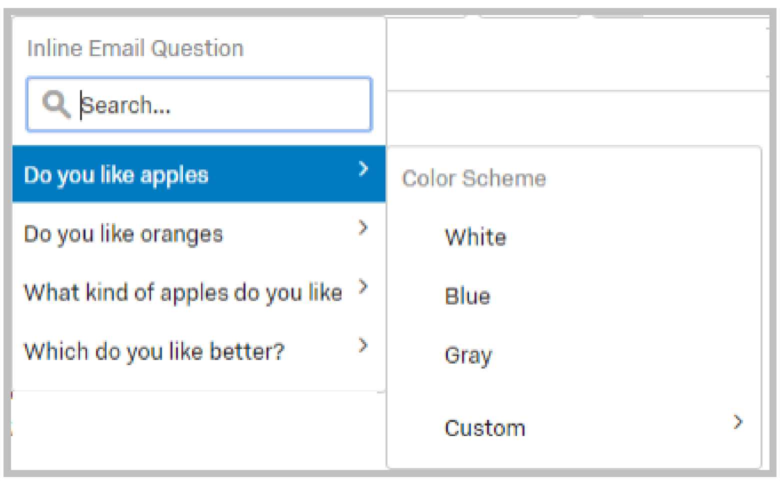
Write the body of the email, place the cursor at the point where you want to insert the survey question. Click the Inline Email Question icon 



Select which question to use in the email

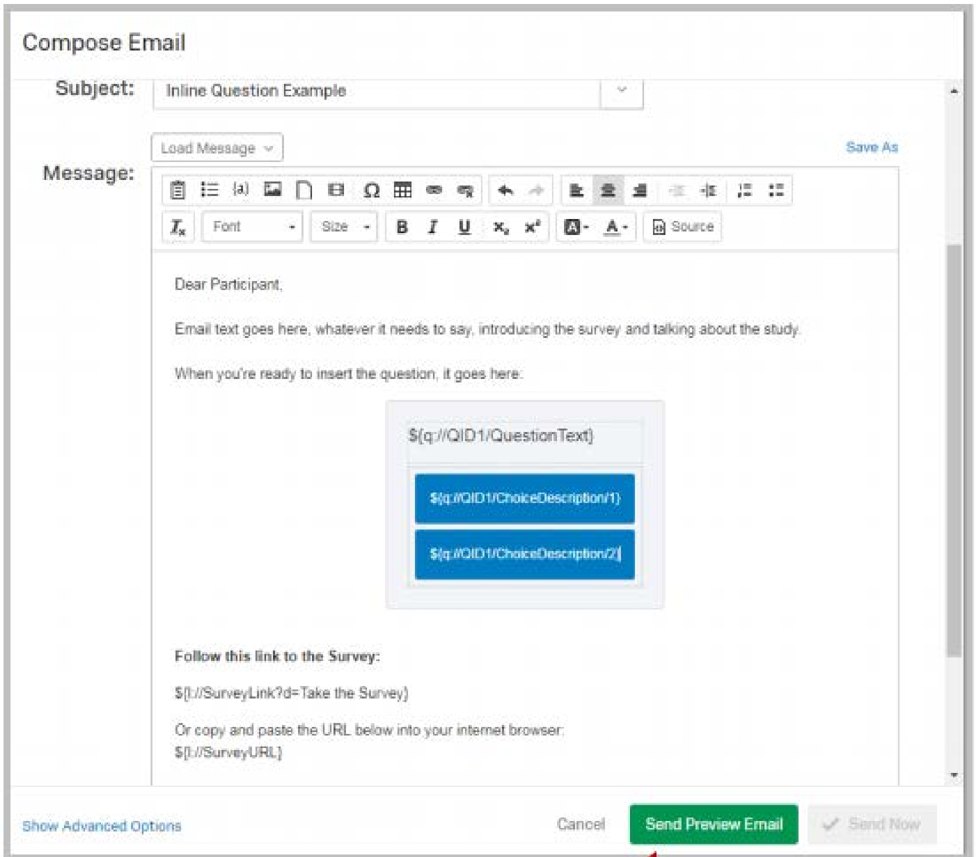


Select a color scheme (blue or grey up the best). Send a test email to view it, it can be changed (delete the question and select it again, with a different color). You can also create a custom color scheme if you're comfortable with that.

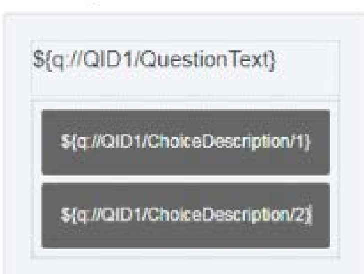


The placeholder question box will appear. It contains Qualtrics code for the question and responses, don't worry that it doesn't show the actual text.

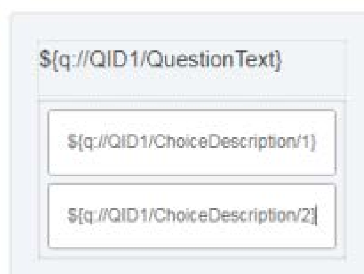
The question is formatted to be centered in the email, it cannot be changed.



Gray Color Scheme

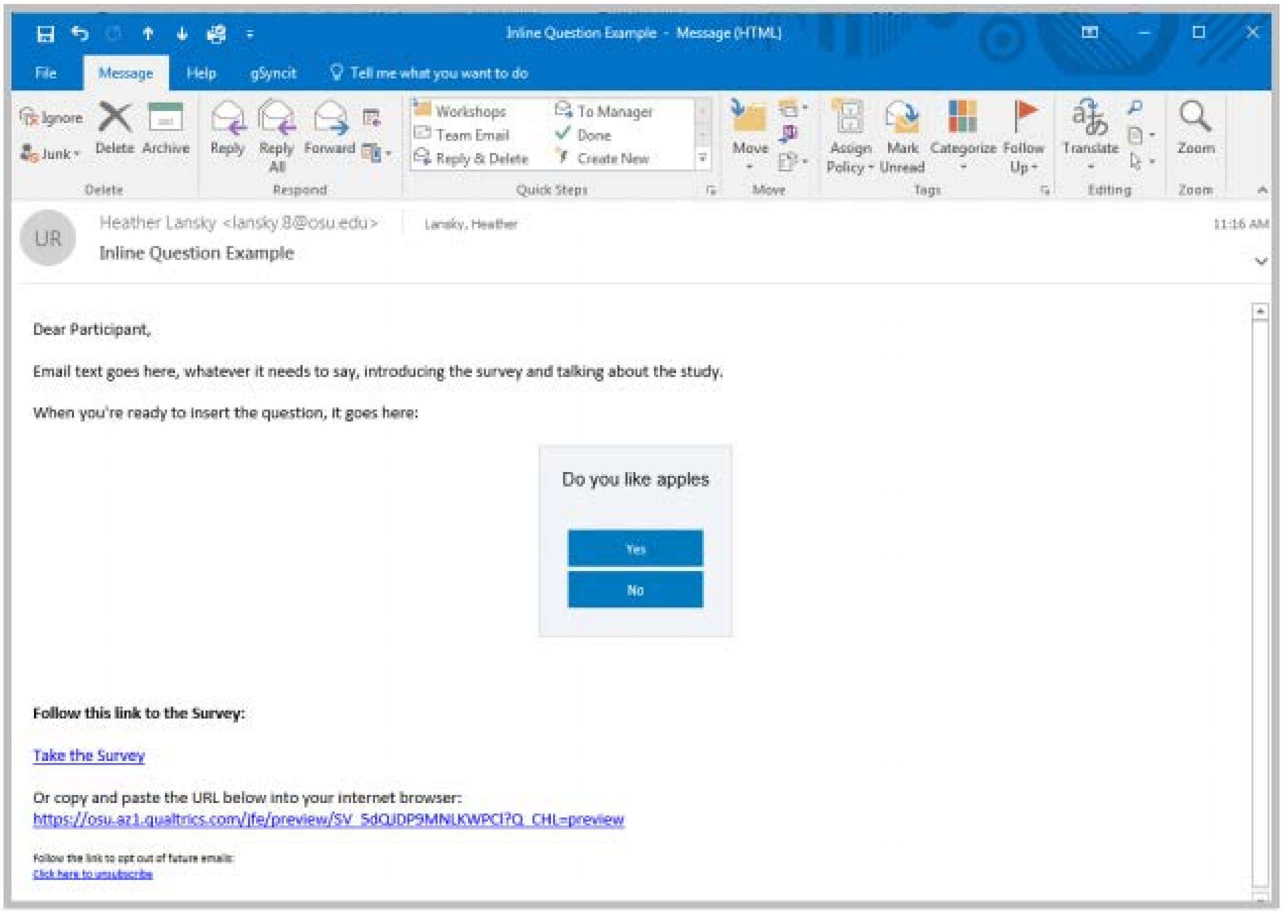


White Color Scheme

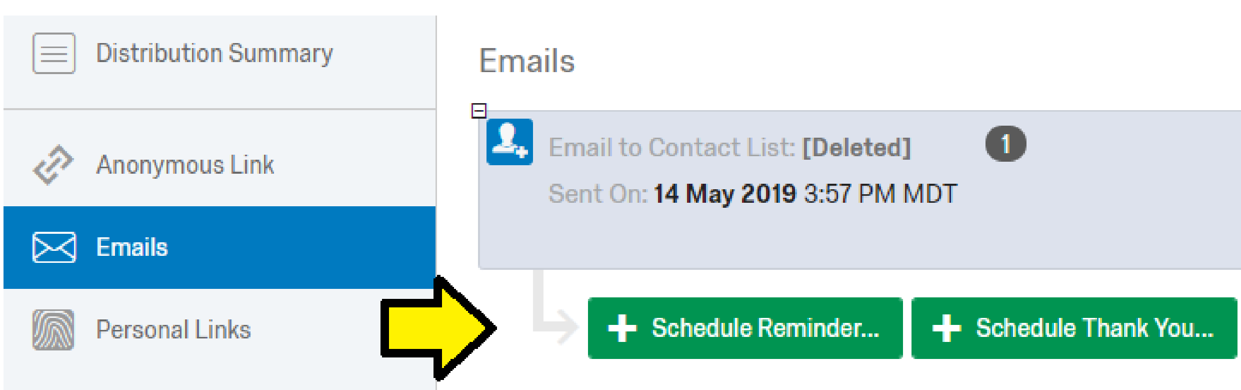


It's good practice to send a **Preview Email** to yourself to make sure it looks and functions as you expect.

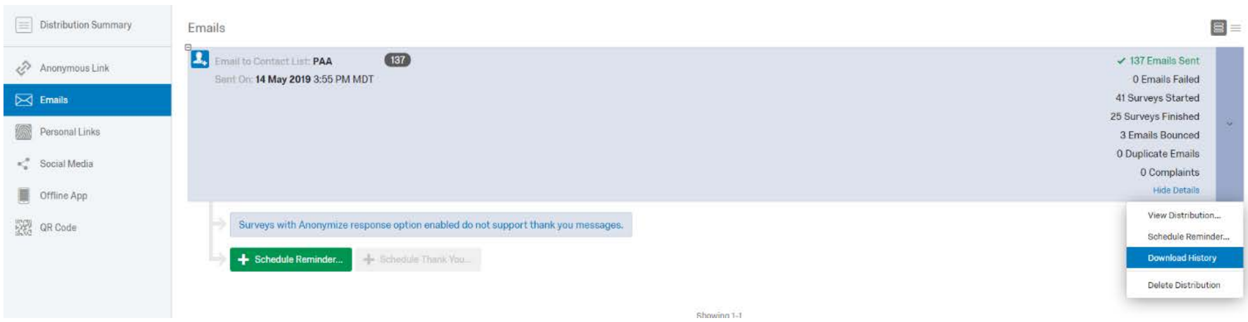
Preview of the example email:



Tip: After you send the initial survey request, we recommend you '**schedule reminder**' to those participants who have not completed your survey. For those that have completed your survey, you can '**schedule a thank you message**.' If you decided to send your survey out through the Qualtrics platform, you can craft a reminder and thank you message here:



Tip: You can see which participants have not completed your survey, you can download a list of participants who have or have not finished your survey. This will download as an Excel spreadsheet.



Tip: Once in Excel, you will be able to view which participants still need to complete the survey, as noticed by a designation of **'email sent.'** Then, you can specifically target those participants in your reminder email.

	A	B	C	D	E	F	G
1	Response ID	Last Name	First Name	External Data Reference	Email	Status	End Date
2	Omitted for Privacy	Balicevac	Admir		Admir.Balicevac@azwestern.edu	Email Sent	Omitted for Privacy
3	Omitted for Privacy	Buchtel	AJ		Arnold.Buchtel@azwestern.edu	Finished Survey	Omitted for Privacy

Data & Analysis Page Basic Overview

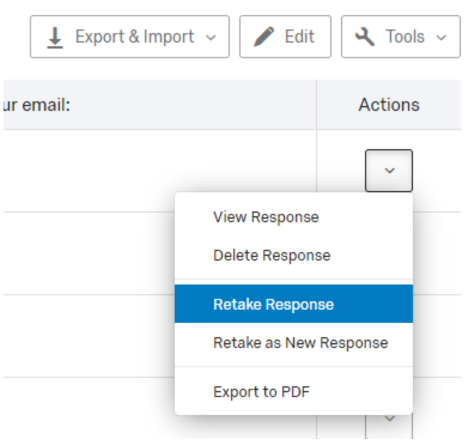
About Data & Analysis

The Data & Analysis tab lets you filter, classify, merge, clean, and statistically analyze your response data:

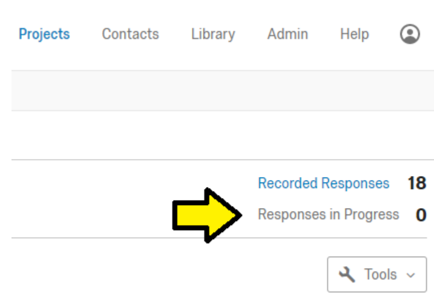
1 Click **Data & Analysis** to reveal up to five key sections.

2 Select between the sections as introduced below:

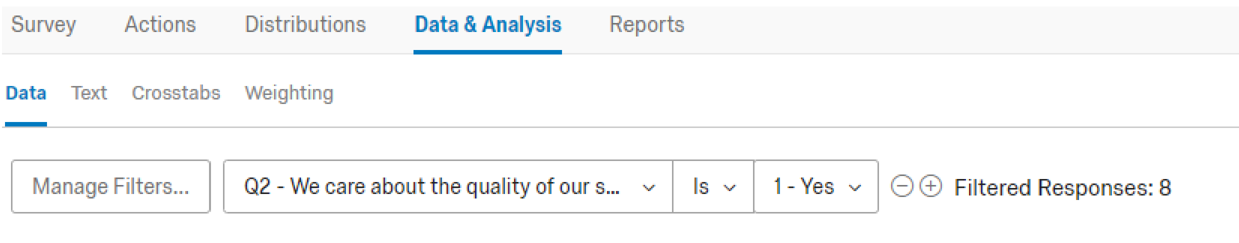
- Data
- Text
- Analysis
- Cross Tabs
- Weighting



Tip: If participants request to ‘**retake or delete their survey**,’ you can fill this request with the **‘Data and Analysis’** tool. Navigate to your participant’s response and use the drop-down menu to select either view response, delete response, retake response, retake as new response, or export to PDF. **The ‘retake response’ tool** will provide you a link which you can provide your participant—their answers will then update on your reports based on their new responses. Use the **‘response in progress’** tool to find participants who are not yet completed with their work—you can then target these participants if you decided to email them a ‘reminder’ to complete the survey.

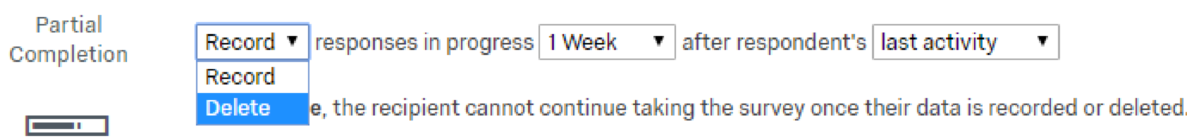


Tip: 'Data and Analysis' Tool is particularly helpful when analyzing recent responses. You can analyze responses based on a specific condition—e.g. if on one question participants selected educational attainment as high-school, and you want to see only those participants who are educated through high-school, you'd set your condition with the **'add filter'** tool to analyze only responses from this population.



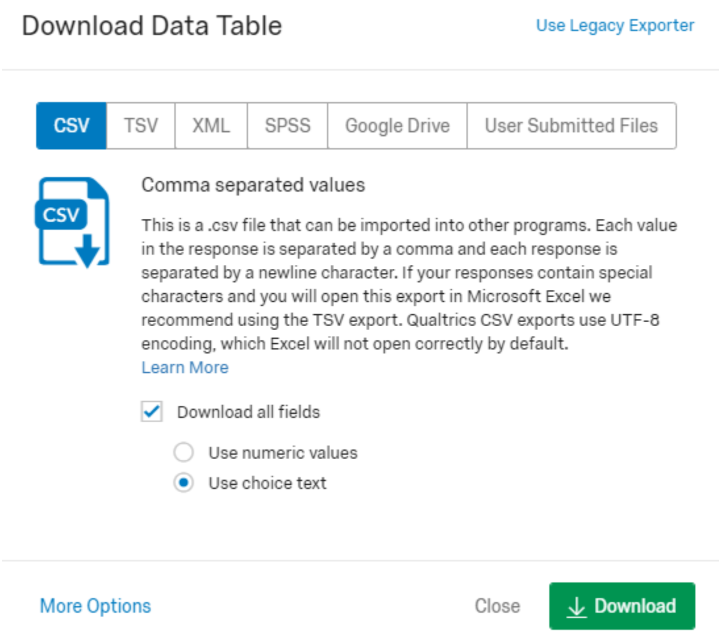
As you can see from the above filter, the responses are filtered to only show those that meet the condition—answer to question 2 was 'Yes.'

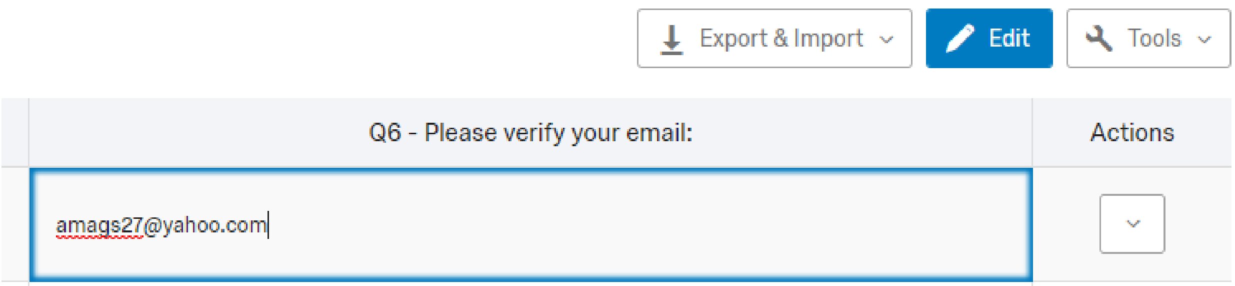
Tip: 'Partial Responses': you may decide that you want to record or delete partial responses in your findings. In order to do either of these, access the **'partial completion'** tool on the **'survey options,'** under the **'survey'** tab.



There are various options. You can record or delete 4 hours after first or last activity or up to a year later.

Tip: 'Export & Import' data: you can export data in various formats. If you filter any responses on the **'data and analysis'** tool, only those filtered responses will export. Clear filters if you want to export a complete set of data.

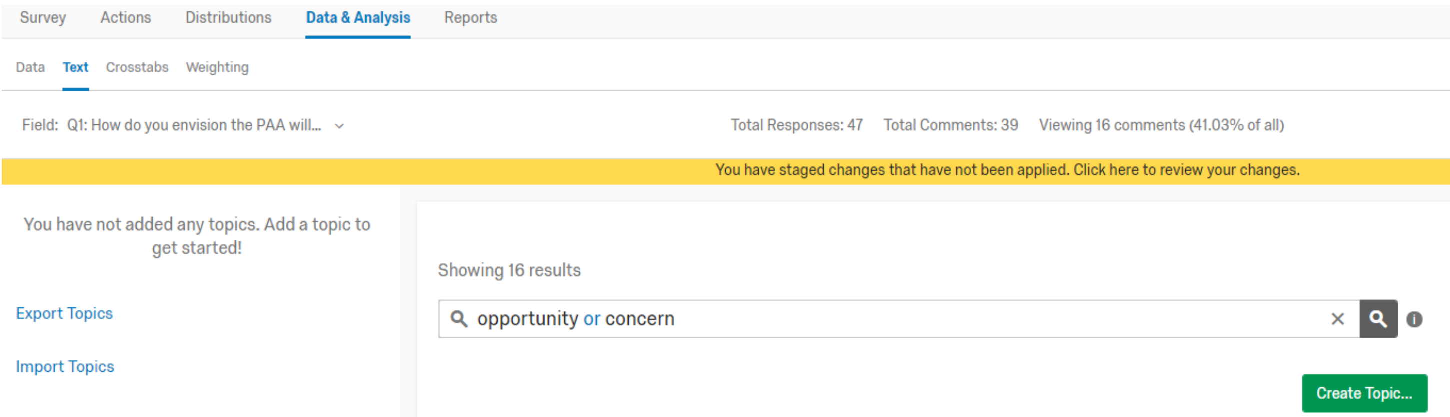




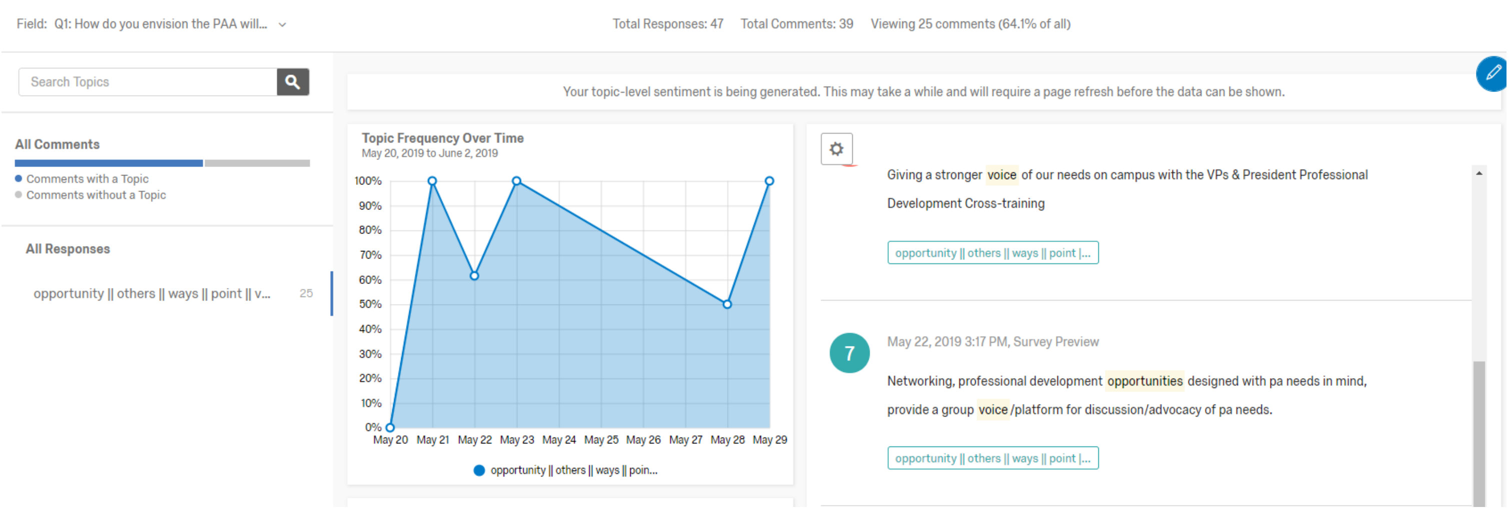
Tip: 'Edit' tool: you can use this to edit any wording on the data.

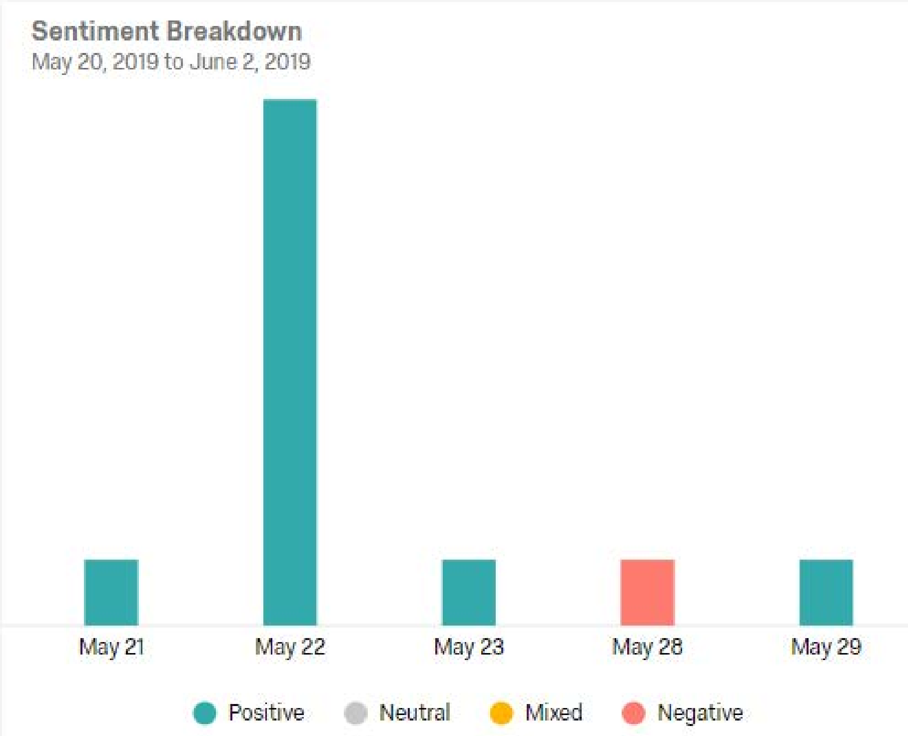
Tip: you can use **'Tools'** to 'create a new field,' 'translate comments,' 'save layouts,' 'delete data,' 'choose columns to display,' and 'select page size.' All these tools can alter the presentation of your data.

You can also analyze **'text'** responses through Qualtrics.



Tip: for the **'Text'** tool, you can query for specific phrases and words. Qualtrics offers suggested topics. When you create a topic, Qualtrics provides you with an analysis of your topic. For example:



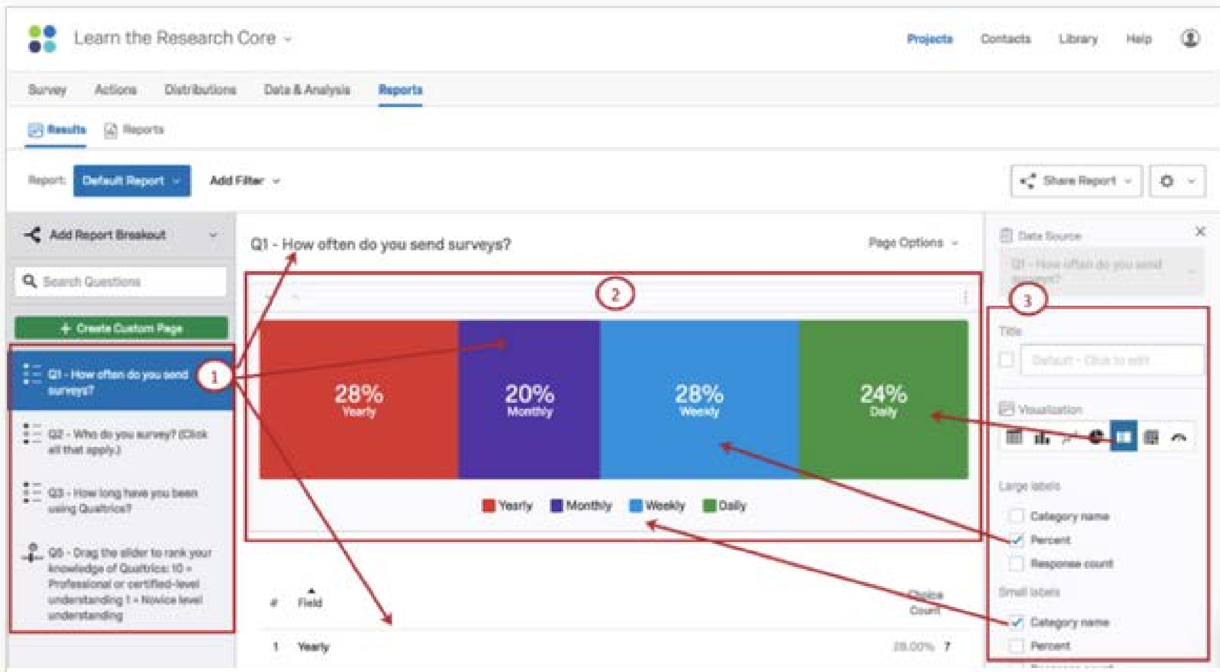

Sentiment Breakdown
May 20, 2019 to June 2, 2019
May 21
May 22
May 23
May 28
May 29
Positive
Neutral
Mixed
Negative


envision
communication
department
give
professional
concern
pa
provide
issue
voice
network
district
opportunity
policy
facilitate
campus
paa
create
training
work
development
information

Results-Reports Page Basic Overview

About Results-Reports

A goal of the **Results** section is to provide 90% of the reporting a user needs with 10% of the effort. To put this goal to the test:



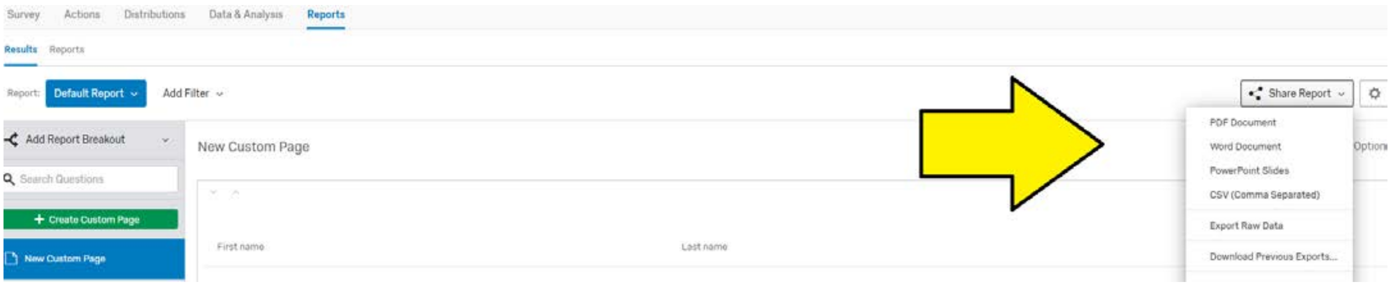
1 Click on any question to view its default **question page** with:

- A default title
- Two default visualizations

2 Click any **visualization** to open its unique *editing pane*.

3 Customize visualizations quickly by picking from the **editing pane's** options.

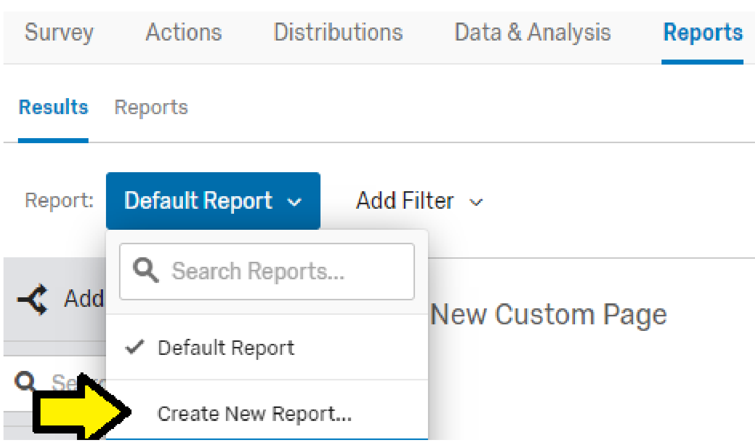
Tip: How to download/export report data: use the **'share report'** function and click on your file type preference:



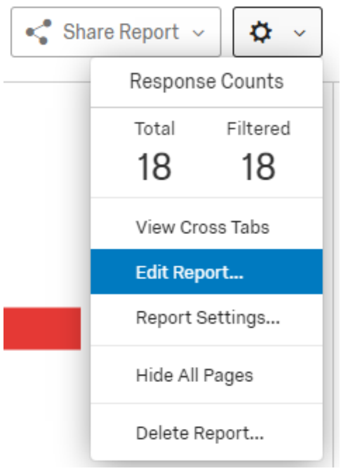
Click any visualization, open its **editing pane**, and experiment! Don't limit yourself to the default visualizations and the predetermined color schemes, charts, or table types. For example, Multiple Choice questions can appear as:

- Horizontal Bar Charts
- Vertical Bar Charts
- Tables
- Pie Charts
- More...

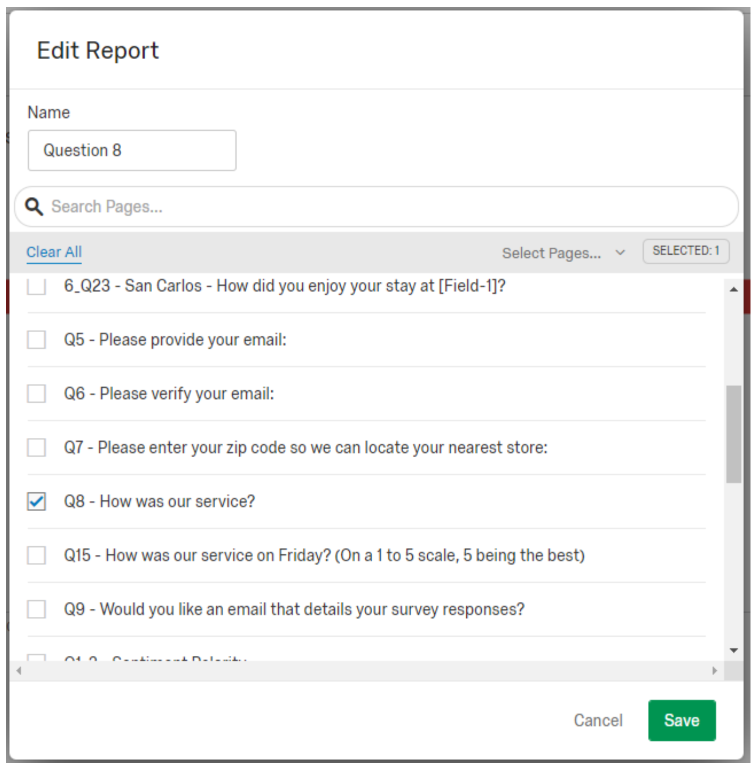
Tip: Qualtrics automatically creates default reports for you based on your survey responses. But, if you'd like to create a custom report—e.g. if you'd like to only analyze question 8 of your survey—you can create a report under the **'reports'** tab, on the left hand-side drop down menu, by clicking on '**default report,'** and then, **'create new report.'**



After you have created a new report, navigate to the settings icon on the right-hand side of your page and click on 'edit report.'

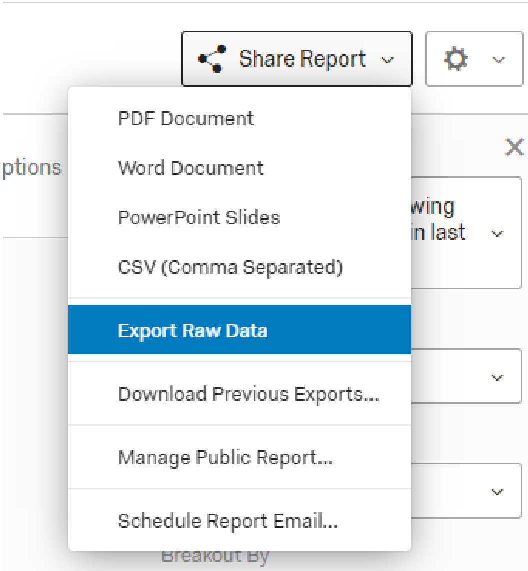


'Edit report' allows you to specify which questions and analysis you want to include in your reports.



Tip: Qualtrics will now provide you with a report with your selected question. You can then customize report using the '**metric,' 'decimal places,' 'breakout,' 'title,' 'visualization,' 'display,' and 'color options'** on the right-hand side of your screen. If you would like to include other information into your report, you can **'create custom page.'** This will add a page to your report, which you can then customize based on '**data source' (question on survey), 'metric,' 'decimal places,' 'breakout,' 'title,' 'visualization,' 'display,' and 'color options'** on the right-hand side of your screen.

You can share your reports using the **'share report'** tool. You can download your reports as PDF and Word documents, powerpoint slides, and CSV (Excel spreadsheets) files. Also, you can export raw data and schedule a report email, which will attached your report in the specified file formatting.



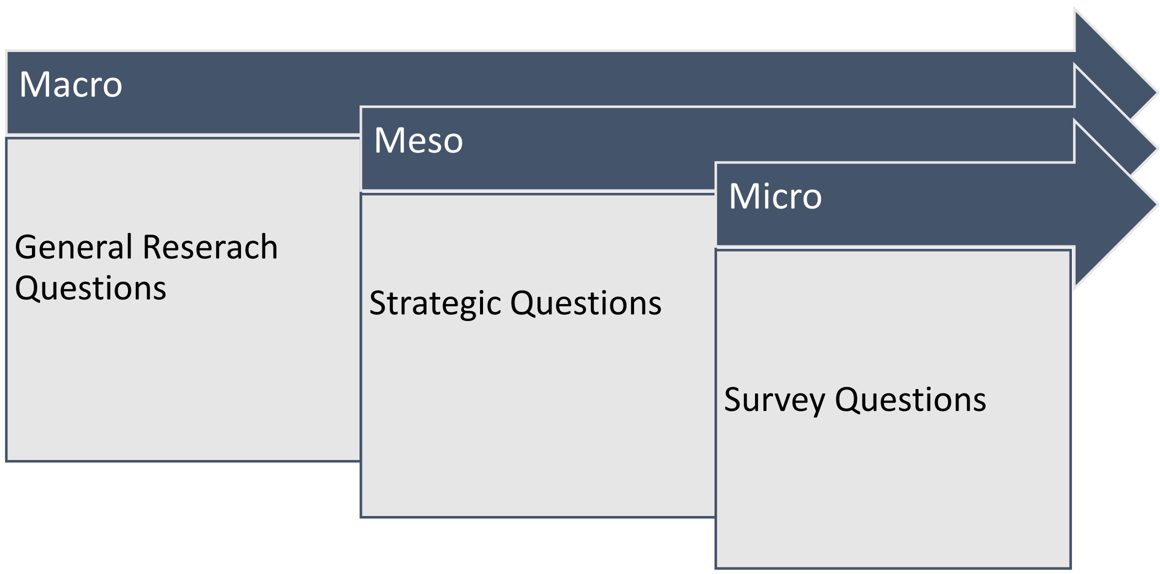
You can provide your report through a webpage. To do this, click on **'manage public report.'** Qualtrics will provide you a link your participants can access the webpage. The reporting on this webpage will update according to new participant survey responses.

Methodology Best Practices (Research Methodology)

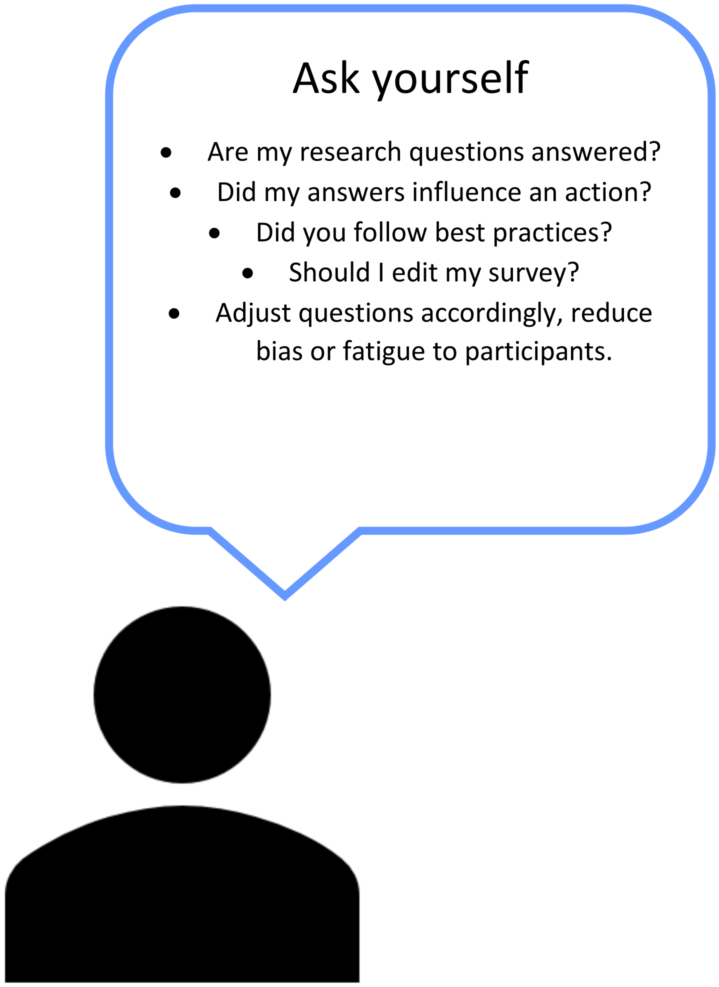
Beginning of Survey General Tips

Tip: At the start of the research process, create a **research plan**.

Typically research plans include a general research section, which is then broken down into business questions, strategic questions, and, ultimately, your survey questions, which are specific to a population, a time, and an analysis goal.



End of Survey General Tips



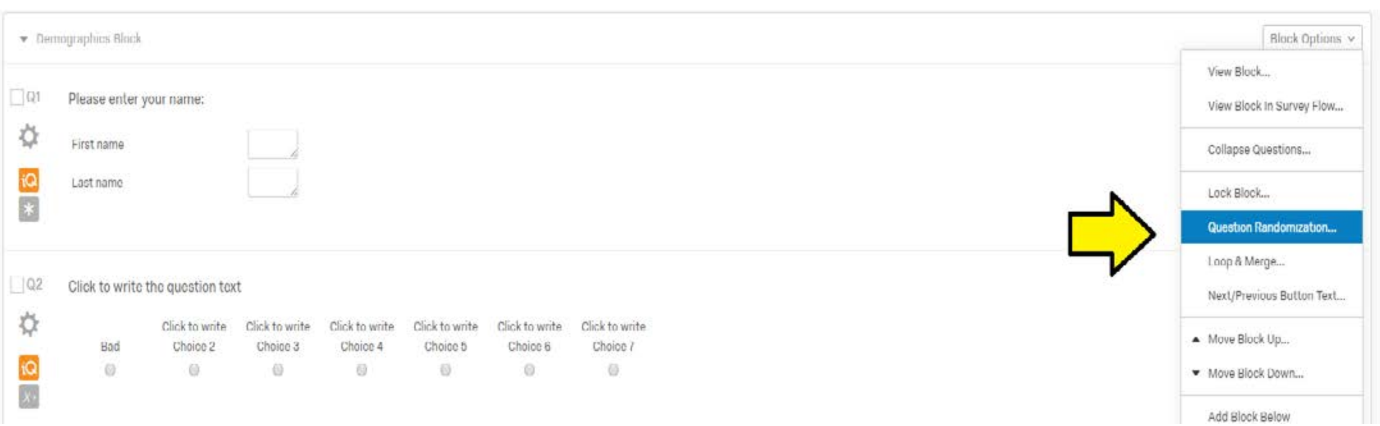
Biases and General Tips to Reduce Bias

Consistency Bias

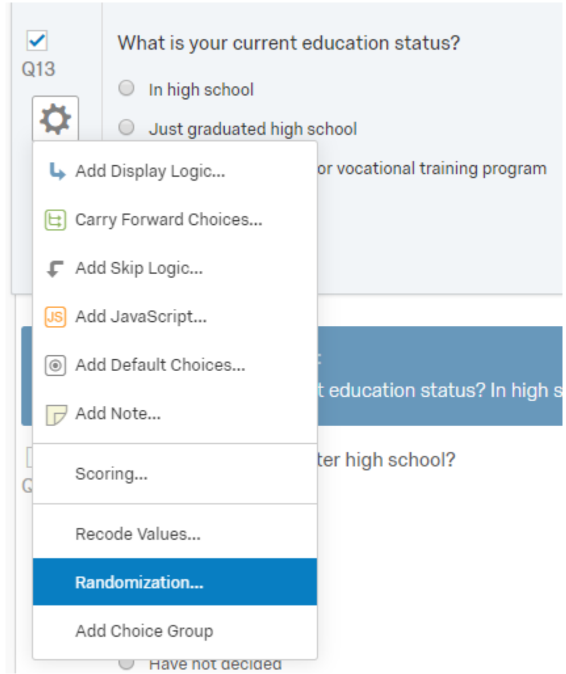
The commonly held idea that we are more consistent in our attitudes, opinions, and beliefs than we actually are, i.e. being unable to see the changes in your thoughts/opinions because you're sure you've always thought the same way. This occurs during the survey process, where participants try to be fair and consistence with what they answered before during the survey. **We recommend researchers should be particularly aware of the order in which questions are asked.**

Consistency biases can occur when we ask these two questions in a particular order, such as, are you supportive of US journalists traveling to Russia? If we then ask, right afterwards, are you supportive of Russian journalists traveling to the U.S., perhaps people will alter their responses to be consistent with their previous responses.

We can limit consistency biases throughout the survey by '**randomizing**' the order of questions. Access randomization on Qualtrics following these paths on the block level:



You can access randomization on Qualtrics following these paths on the question level:



Interpretation Bias

An information-processing bias, the tendency to inappropriately analyze ambiguous stimuli, scenarios and events. This bias can occur during the survey process when a participant reads a question's meaning incorrectly. **We recommend researchers should be particularly aware of the order in which questions are asked.**

For example, if we ask our participants, what is your company's profit? And if we then ask, how would you rate your company's health? Perhaps our participants will rate the company's health by how much the profit is, incorrectly reading the meaning of the question.

We can limit consistency biases throughout the survey by **'randomizing'** the order of questions.

Priming Biases

Priming describes how ideas prompt other ideas later on without an individual's conscious awareness. When exposed to certain stimuli, such as words or images, your future perceptions and decisions will be influenced by what might seem irrelevant item. **We recommend researchers should be particularly aware of the order in which questions are asked, because a question's order can pre-dispose respondents to answer in a particular way.**

For example, if we ask, what is your favorite ice cream? If we then ask, what is your favorite dessert?—because of the order of these questions, we are leading our respondents down a particular path. **If there is no inherent order, consider 'randomizing' questions to reduce bias.**

Minimizing Survey Fatigue, Bias, and General Tips For Survey Completion

Primacy Effect

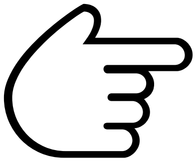
The primacy effect occurs when you're more likely to remember words at the beginning of a list. A suggested reason for the primacy effect is that the initial items presented are most effectively stored in long-term memory because of the greater amount of processing devoted to them.

This is most common in list questions. **To limit this**, we recommend randomizing question responses (at the question level) and questions at the block level.

Acquiescence Bias

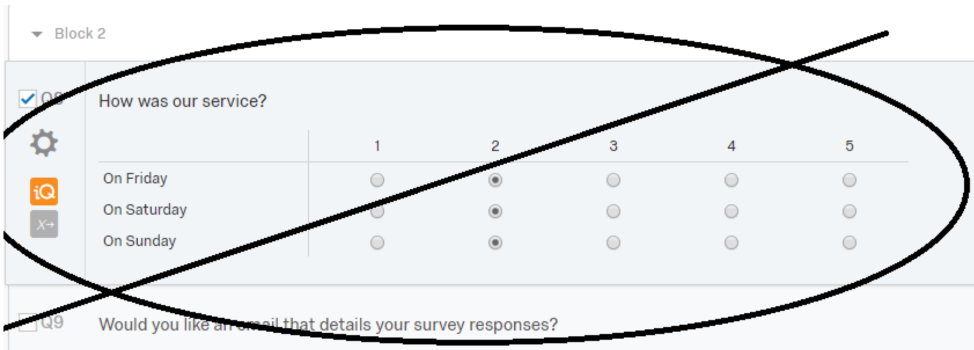
Acquiescence bias is a category of response bias in which respondents to a survey have a tendency to agree with all the questions or to indicate a positive connotation. Acquiescence is sometimes referred to as "yea-saying" and is the tendency of a respondent to agree with a statement when in doubt.

To limit this, we recommend you focus questions on the respondent’s experiences, not their reaction to a statement—e.g. How satisfied are you? How unsatisfied are you?

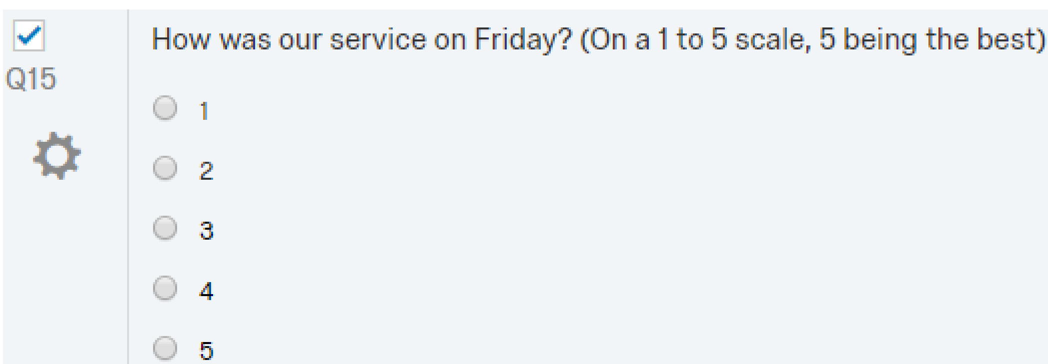


Straight Lining

Where participants click the same responses down the line, especially when answering matrix table questions. **To limit straight lining**, we recommend putting one line per page, and not using matrix table question types.



Instead, try this:



- **Do not include "Don't know" as possible question responses**. These responses offer an easy way out for participants and are difficult to analyze.
    - **We recommend** you provide a midpoint response option instead—e.g. "neither satisfied nor dissatisfied."

- **Ambiguity bias**: The ambiguity effect is a cognitive bias where decision making is affected by a lack of information, or "ambiguity". The effect implies that people tend to select options for which the probability of a favorable outcome is known, over an option for which the probability of a favorable outcome is unknown.
    - **To limit ambiguity effect**, we recommend you use simple, clear phrases that cannot be misinterpreted and words that that have only a single meaning.

- **Social desirability bias**: is a type of response bias that is the tendency of survey respondents to answer questions in a manner that will be viewed favorably by others. Do not write questions that include "On average, how often do you…?" Instead ask about a specific time frame—e.g. "During the last 7 days, how many days did you exercise for more than 30 minutes?"

- **Leading and complex questions**
    - We recommend you use, direct, neutral working and include both ends of the scale in the question text—e.g. "extremely important…..not important."
    - Keep questions short and simple and avoid asking about more than one item at a time.

- **Evaluating participant attention**
    - **We recommend** you ask participant to commit to providing quality answers at the beginning of your survey.
    - For sample, at the start of your survey we recommend you write a question **such as**, "We care about the quality of our survey data. Do you commit to thoughtfully providing your best answers?"
        - Yes
        - No
        - I cannot promise either.

Mobile Device Accessibility General Tips

Use simple questions

Limit open-ended questions

Play only 1 or 2 questions per page

Position scales, if any, vertically

Survey Length General Tips

You should strive to make your surveys **as short as possible**—this will increase survey completion rates.

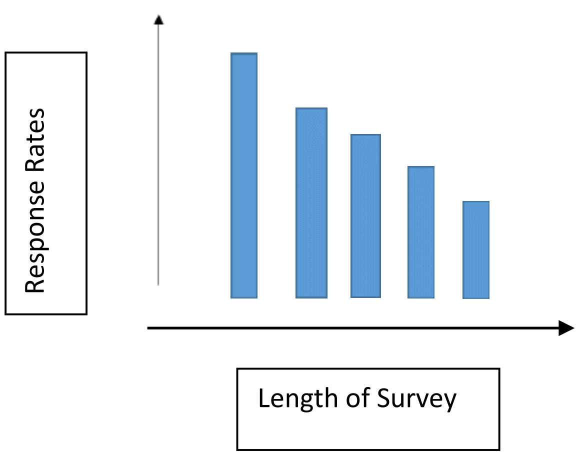
Leading and complex questions

- We recommend you use, direct, neutral working and include both ends of the scale in the question text—e.g. "extremely important…..not important."
- Keep questions short and simple and avoid asking about more than one question at a time.

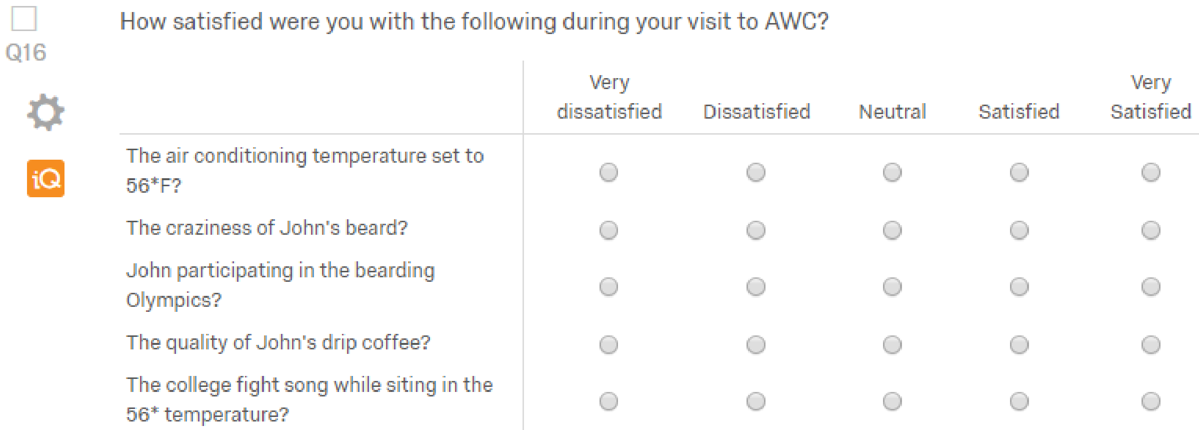
Do not include many long text answer boxes, double topic questions, and matrix tables—this can tax survey comprehension and lower completion rates.

Design each question with **analysis and reporting in mind**—this will save you time in the long run.

Longer surveys result in lower completion rates and lower quality.

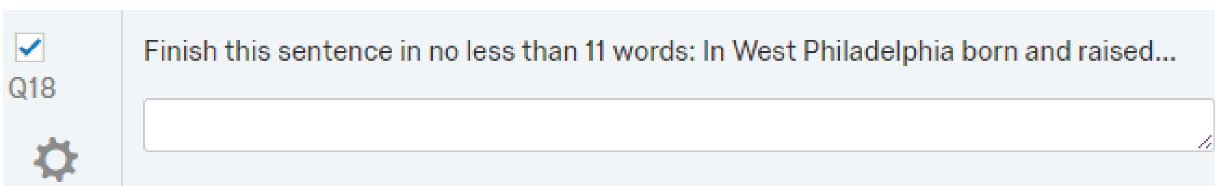


Use These Questions Sparingly



'Matrix Tables:' use these questions sparingly. These are difficult to answer, they do not increase response time, do not limit survey completion times, are not accessible to people without a formal education, they favor fast responses over thoughtful responses, can lead to straight lining, and are not accessible on mobile devices.

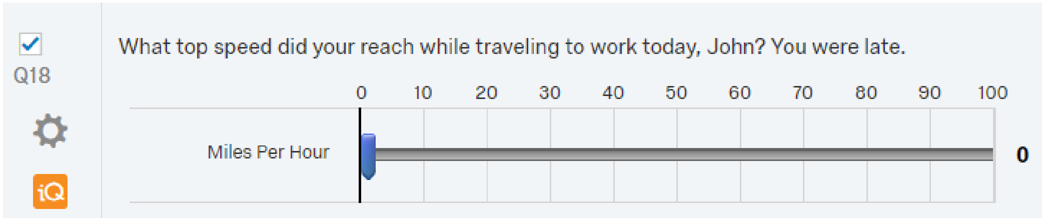
We recommend you split each row into separate questions.



'Open Text Questions:' use these questions sparingly. These produce anxiety in many participants, participants will provide a wide range of answers, these questions are difficult to analyze and quantify for researchers, and, many times, participants skip these questions.

We recommend you only use these questions as follow-ups to multiple choice questions, when you want further, clarifying information.

If you decide to use open text questions, provide a motivating statement within the question for the participants—e.g. "Your feedback will help us improve for your next experience."



'Slider Questions:' use these questions sparingly. These questions have the potential to limit comprehension. Also, these questions are not very accessible on mobile devices.

Increasing Response Rates General Tips

Response rates are positively affected by respondent motivation, invitation message, survey experience and length of survey, and timeliness.

Distribute survey immediately after event to increase accuracy and response rates.

It is best to send surveys out on **Monday mornings**, Monday's which are not holidays. Friday is the worst day, in terms of survey completion rates, to send out your surveys.

Email reminders to participants who have not completed your survey. Do not **remind participants** more than twice. For more information on how to send out reminders visit the Qualtrics website.

INCENTIVES THAT WORK!

Using Exchange and Incentives to Increase Online Survey Response Rates

The process of using survey techniques to obtain information from potential respondents can be viewed as a special case of social exchange. Very simply, social exchange theory asserts that the actions of individuals are motivated by the return (or rewards) these actions are expected to, or usually do, bring from others.

Whether a given behavior occurs is a function of the perceived costs of completing a survey and the rewards (not necessarily monetary) one expects to receive as a result of completing the survey.

You can increase survey response rates with the following tips:

- A small incentive for each respondent is better than a large incentive for a few
- Raffles generally produce a lower response rate than a small incentive for each respondent
- Appeal to the desire of respondents to feel important by explaining how their feedback will change the status quo
- Clearly explain to respondents how you will use their feedback and who will see it
- Tell respondents why you chose them for this survey

Larger incentives for survey completion will generally produce higher response rates. These incentives are often offered to the first 100 respondents to complete the survey.

Using Cognitive Dissonance to Increase Online Survey Response Rates

As used to explain survey response, the theory of cognitive dissonance states that reducing dissonance is an important component of the respond/not respond decision by potential survey respondents.

The process is triggered by receipt of a questionnaire and cover letter asking for participation. Assuming that failure to respond might be inconsistent with a person's self-perception of being a helpful person, or perhaps at least one who honors reasonable requests, failure to respond will produce a state of dissonance that the potential respondent seeks to reduce by becoming a survey respondent.

Invitation Message/Email Survey Link

Subject line

Avoid using the words, “free,” “help,” “percent off,” “survey,” and using exclamation points and all caps on the subject line.

Message Body (Example)

Specific to respondent

Clearly states survey purpose and why participant was selected

Uses 50 words or less

Susana,
We at AWC want to hear from you! We are conducting research on student perceptions on our CAMP Program and want to hear from your experience. The survey will only take 3 minutes of your time. We thank you for your time. If you have questions, contact John Smith, js@azwestern.edu.

Provides contact info

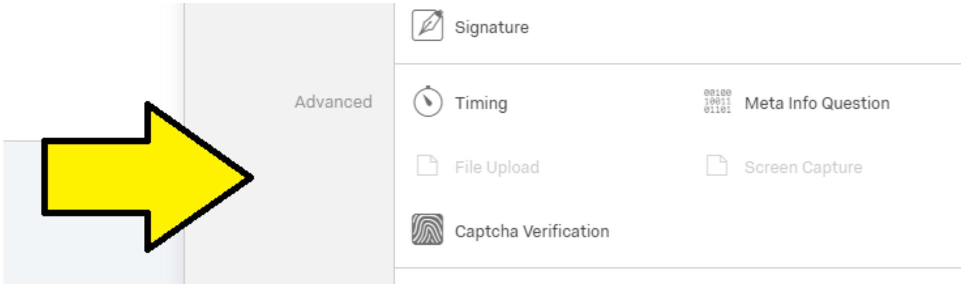
Thanks them in advance for their time

Provides realistic time estimate

Qualtrics provides estimated response times on the projects page

Advanced Technical Tips (Research Core)

Advanced question types



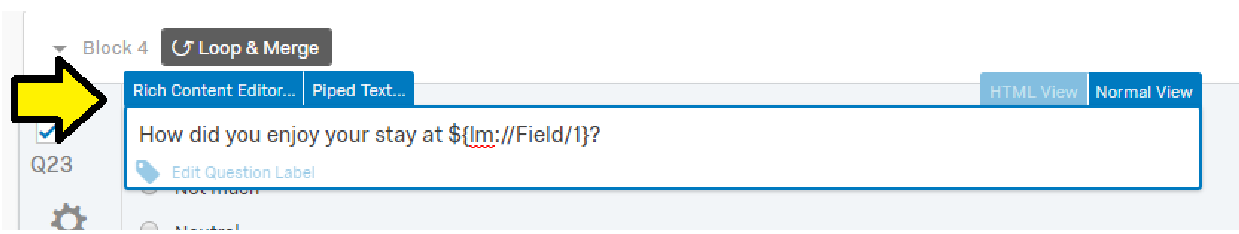
'Timing:' This question lets you record and manage how long a participant spends on a page. This question will not be displayed to the participant. We recommend this question for use on tests and quizzes, as these are usually timed. Section blocks or an entire survey can be timed. For an open-ended survey, we suggest do not use this question, as survey completion times vary per person.

'Captcha Verification:' This question will help you verify actual human interaction with your survey. We recommend you use this question at the beginning of the survey, if at all.

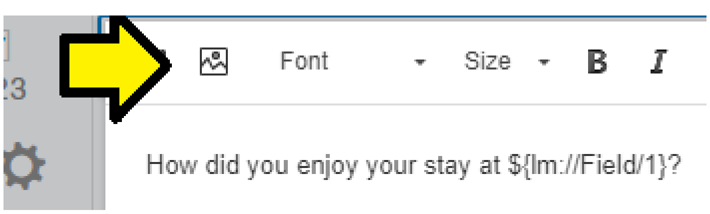
'Meta Info' Question: This question will record the participant's meta/browser information. It will not be displayed to the participant—you can collect browser type, browser version, operating system, screen resolution, flash version, java support, and user agent. This data is useful when analyzing how your participant's access your survey—we can then plan future surveys accordingly.

Adding graphics/images to questions

You can add images at the question level and at the choice level, by accessing the '**rich content editor.'**



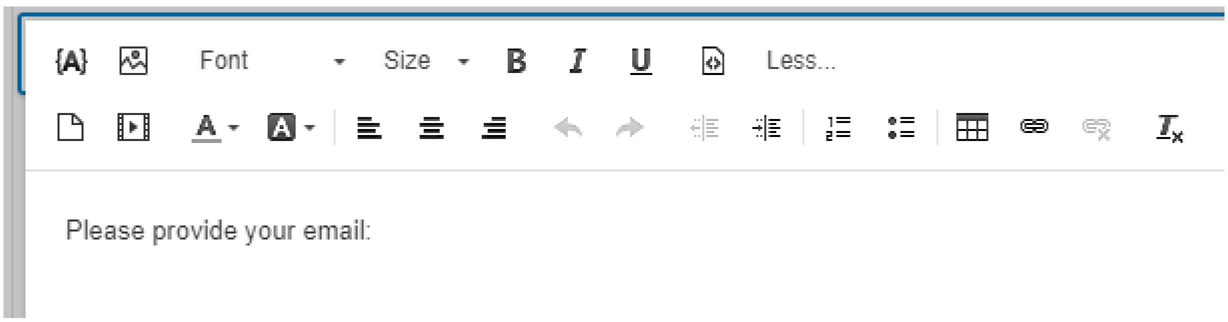
Then, click insert graphic



You can then insert a graphic from the library or you can upload a new graphic.

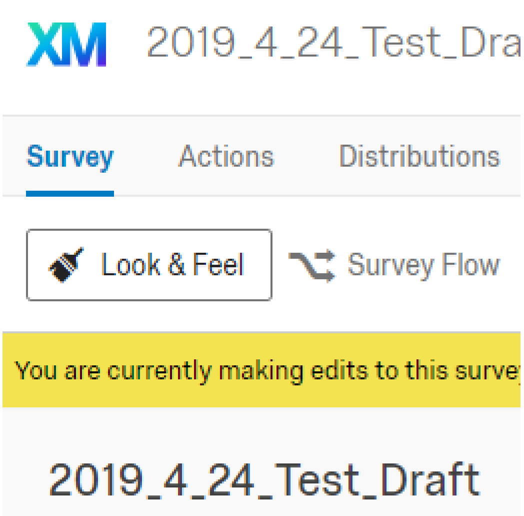
Enriching Questions with Styling and Media

You can alter content using the '**rich content editor**,' on the question level. **Change fonts, alignment, and link to webpages**.

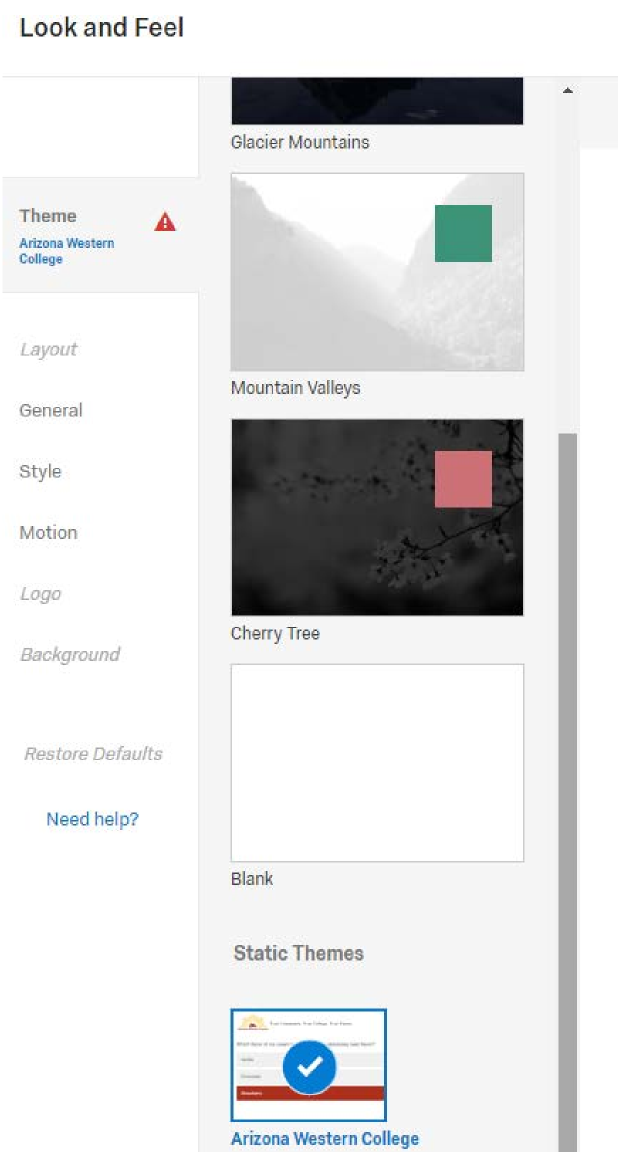


Applying Styles to Your Survey

You can change survey themes by accessing the 'look and feel' tool.



AWC has its own survey theme you can use

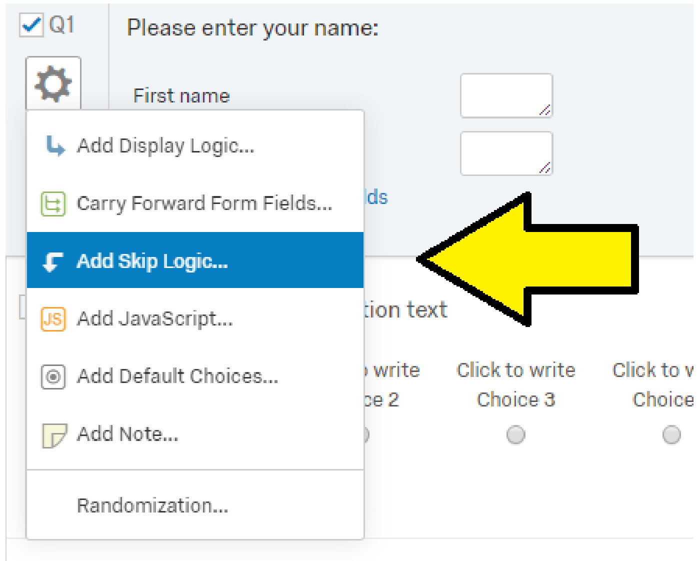


With this tool, you can also change your survey's page **transitions, and general styling, like fonts**.

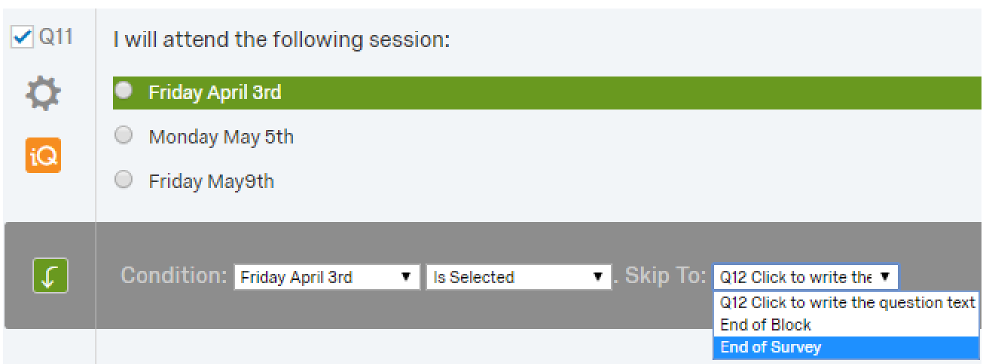
Displaying and Hiding Questions

You can display and hide questions, for specific participants, in various ways. Through '**skip logic,' 'display logic,' or 'branch logic**.'

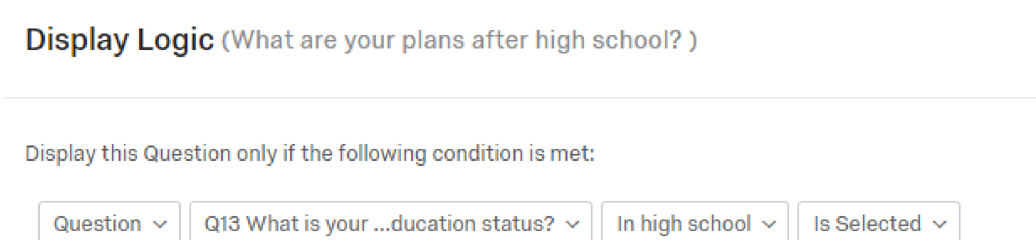
'**Skip logic**:' Skip logic is a feature that changes what question or page a participant sees next based on how they answer the current question. **Skip logic** creates a custom path through the survey that varies based on a respondent's answers. Access the tool by following these steps:

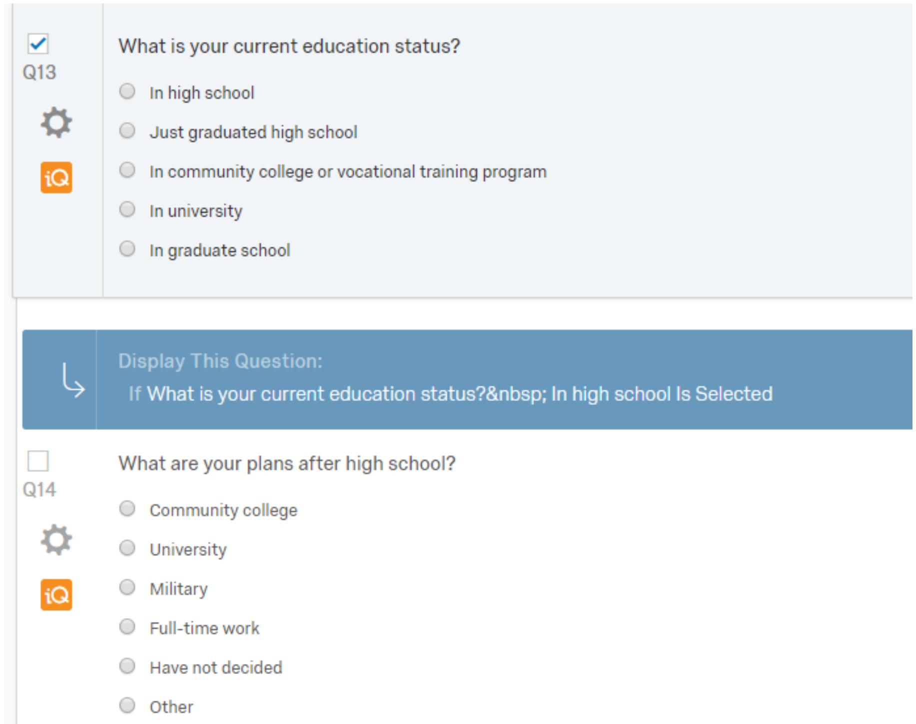


Set a condition:



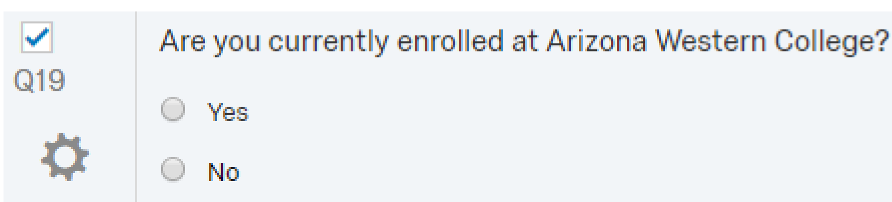
'Display logic:' You can use **Display Logic** to create a survey that is customized to each respondent. When a specific question or answer choice pertains only to certain respondents, you can set **Display Logic** on it so that it shows conditionally, based on previous information.



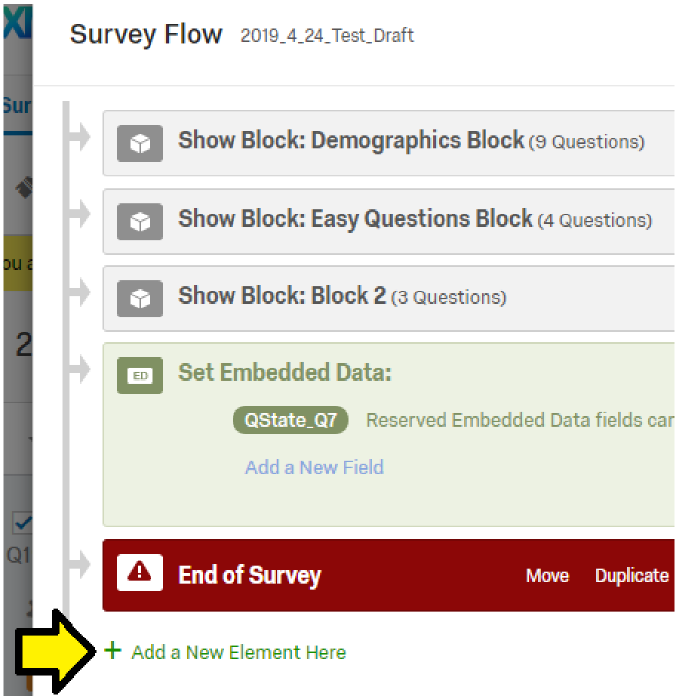


'Branch Logic:' Allows you to hide entire blocks from participants, if they do not meet a certain condition. This is useful if you want to filter participants. For example, if you want to survey only AWC students you can work something like this.

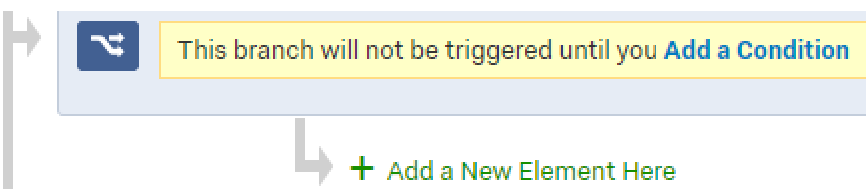
First write a question like this



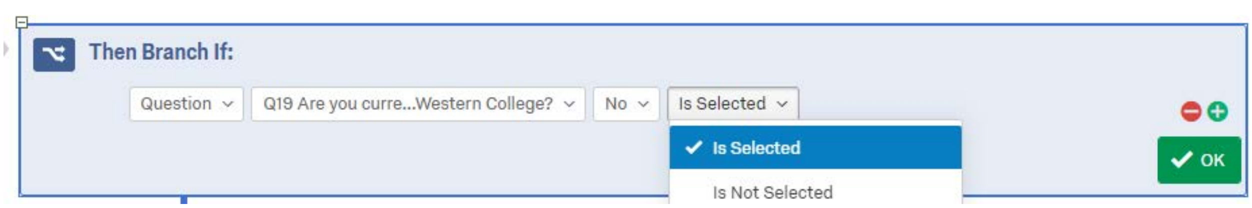
Then, navigate to the survey flow and add a new element.



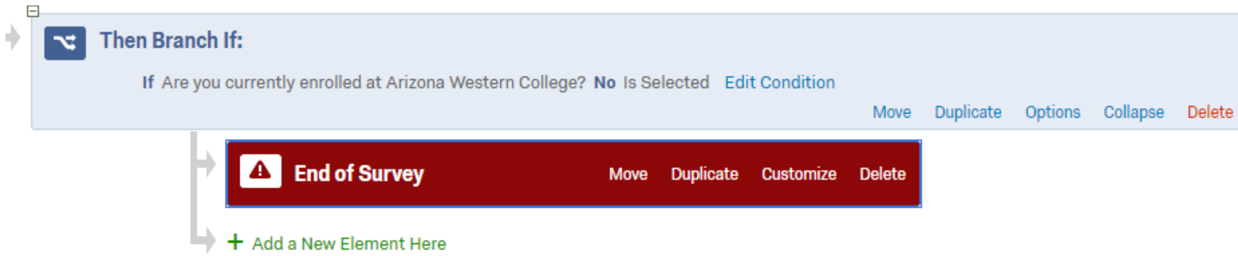
Than, click on branch. And add a condition. This will set your filter.



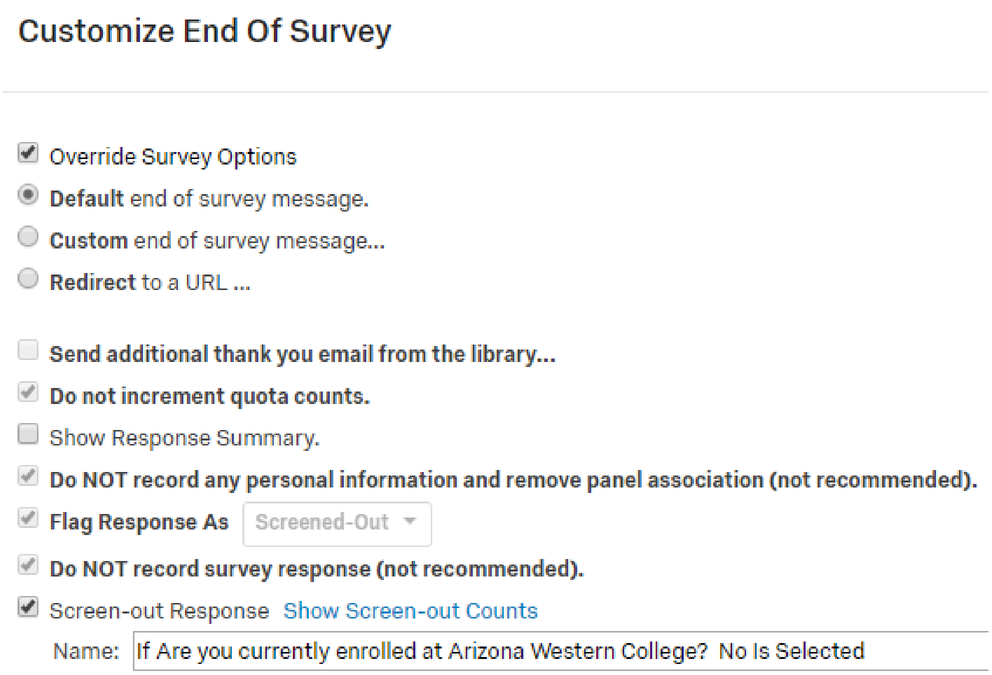
Select question we wrote previously—are you currently enrolled at AWC?



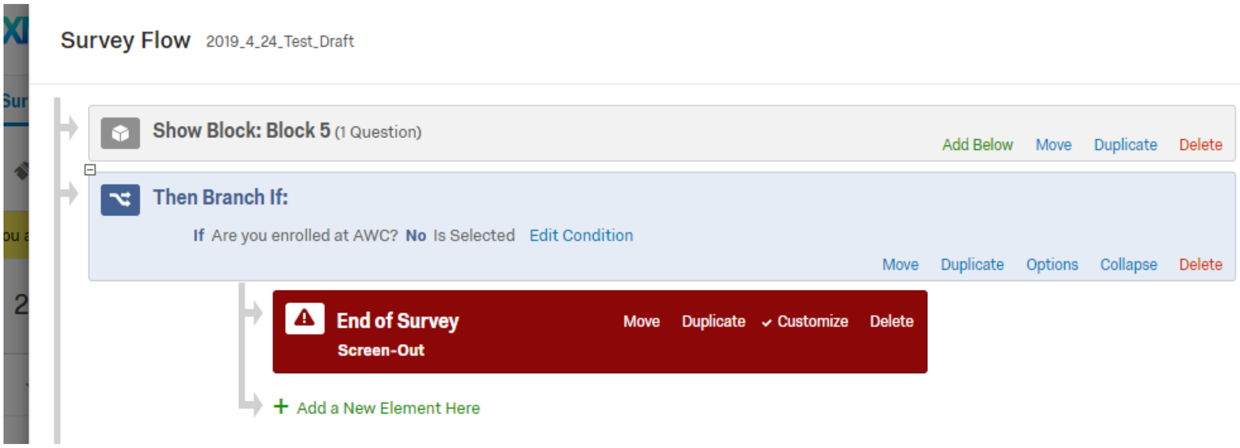
Then add an end of survey element below this branch condition. We will then customize the end of survey element.



Customize the element and click on override survey options and the screen out response box. This will override the settings and will filter out those participants which do not fit conditions to be redirected to the end of the survey.



Finally, you will position the branch element, with the end of survey element below, below the block with the original question we asked within the survey flow page:



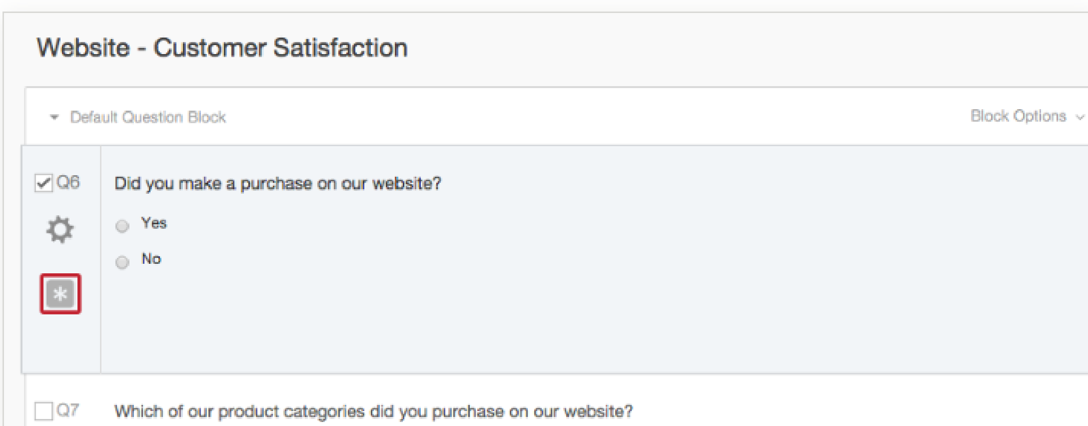
Now you can filter out those people who are not enrolled at AWC.

Validation Tools

About Validation

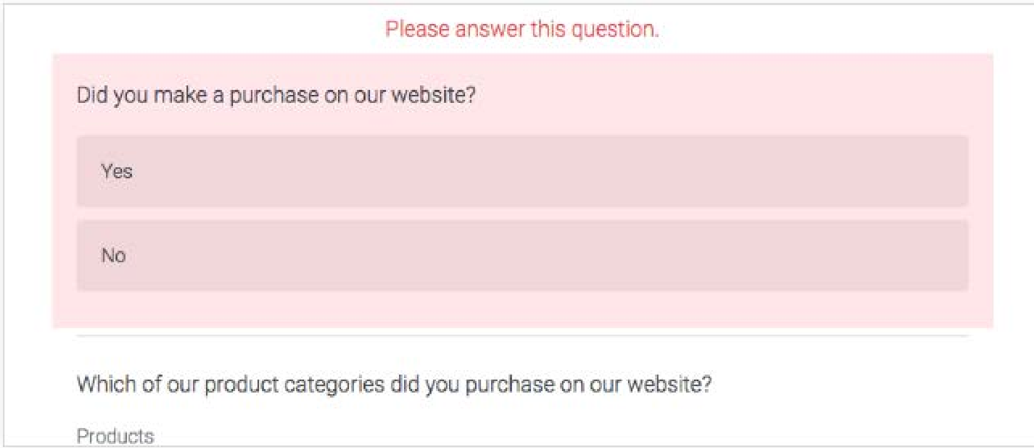
You can use validation to force respondents to answer a question or request that they consider answering the question before leaving the page. These options can also be used to force a certain type of response (e.g., valid phone numbers only).

There are four main validation features available for nearly every question type: Force Response, Request Response, Custom Validation, and Custom Validation Messages. When any of the validation options are enabled, an asterisk icon will appear to the left of the question, indicating that the question has some form of validation.



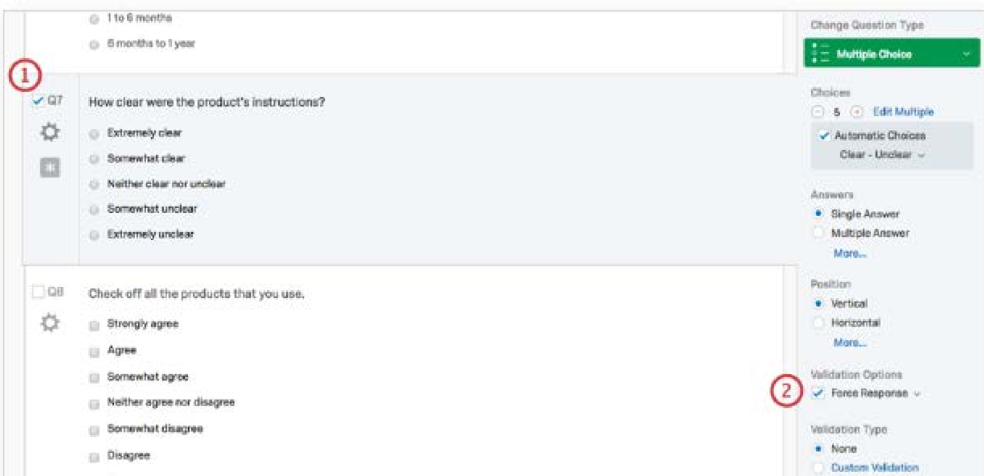
Force Response

If certain questions in your survey are more important than others, or if survey logic depends on them, you may want to enable Force Response. This option requires respondents to answer the question before they can progress to the next page of the survey. If they try to progress without answering the question, they will see a message letting them know they must answer the question to proceed.



TO SET FORCE RESPONSE ON A QUESTION

1 Select the question.

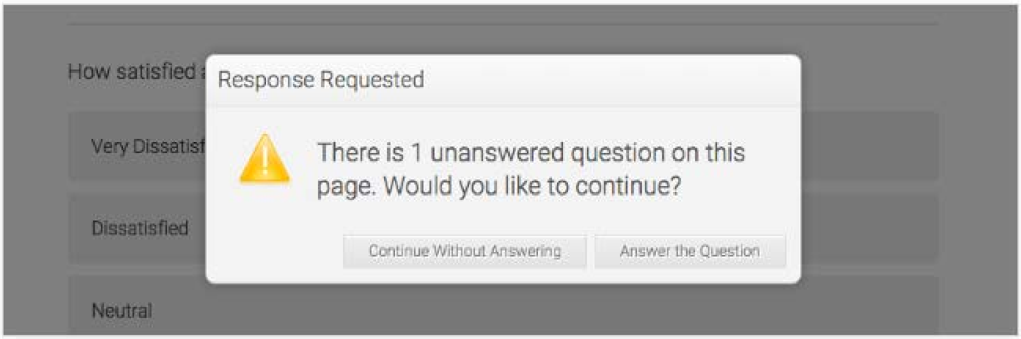


2 Select Force Response on the editing pane to the right of the question.

Request Response

Request Response allows you to remind respondents that they missed a question without requiring that they go back and answer it. This can be a tactful way to increase question response rates without violating privacy guidelines that apply to many studies.

When Request Response is selected, and a respondent skips the question, Qualtrics will ask if the respondent would like to go back and answer the skipped question before they move to a new page.



TO SET REQUEST RESPONSE ON A QUESTION

1. Click the Validation Options dropdown on the editing pane.
2. Select Request Response.

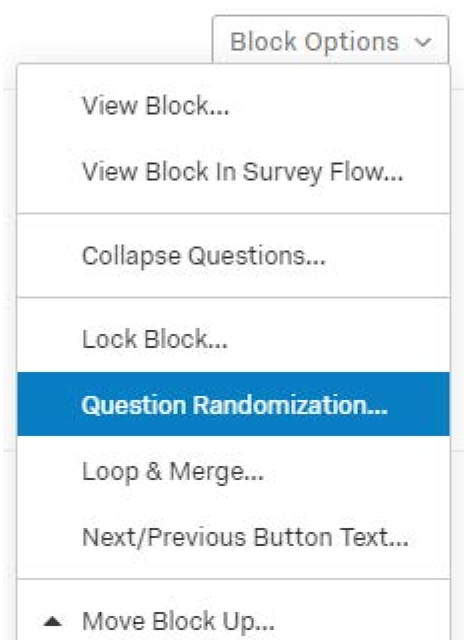
We recommend you **limit 'force responses'** throughout your surveys, using them for responses such as email addresses and contact information. Including many force responses throughout can increase survey fatigue and frustration.

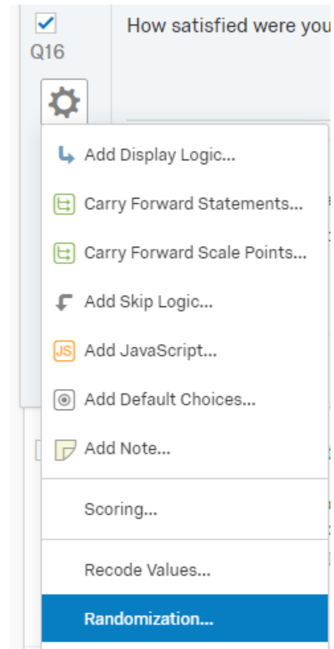
We recommend you use '**request responses'** on particularly important questions throughout your survey.

For further information on custom validation and custom validation messages, please refer to Qualtrics XM Support.

Question Randomization

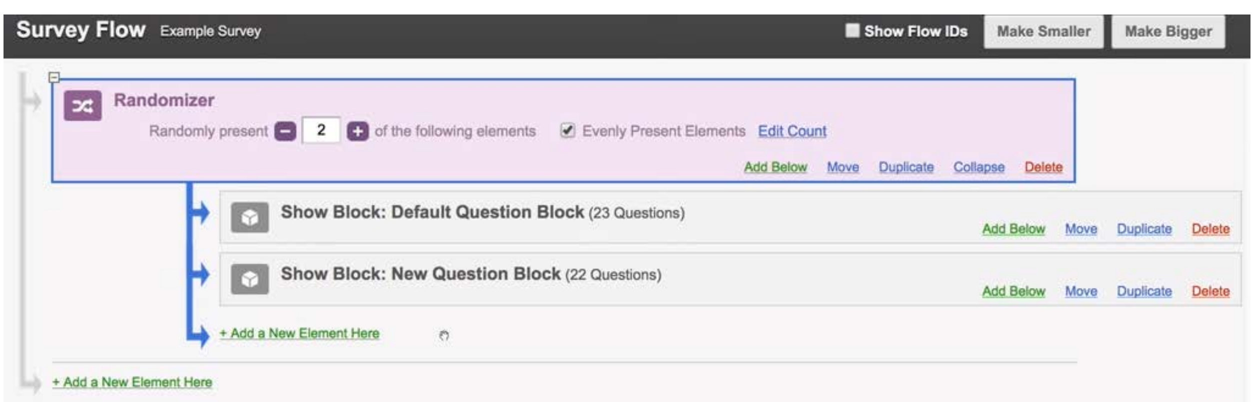
'Question randomization' can be applied at the **block level** (which will affect and randomize all questions within a block) and at the **question level** (which will only affect a particular question). Access these tools by following these paths:





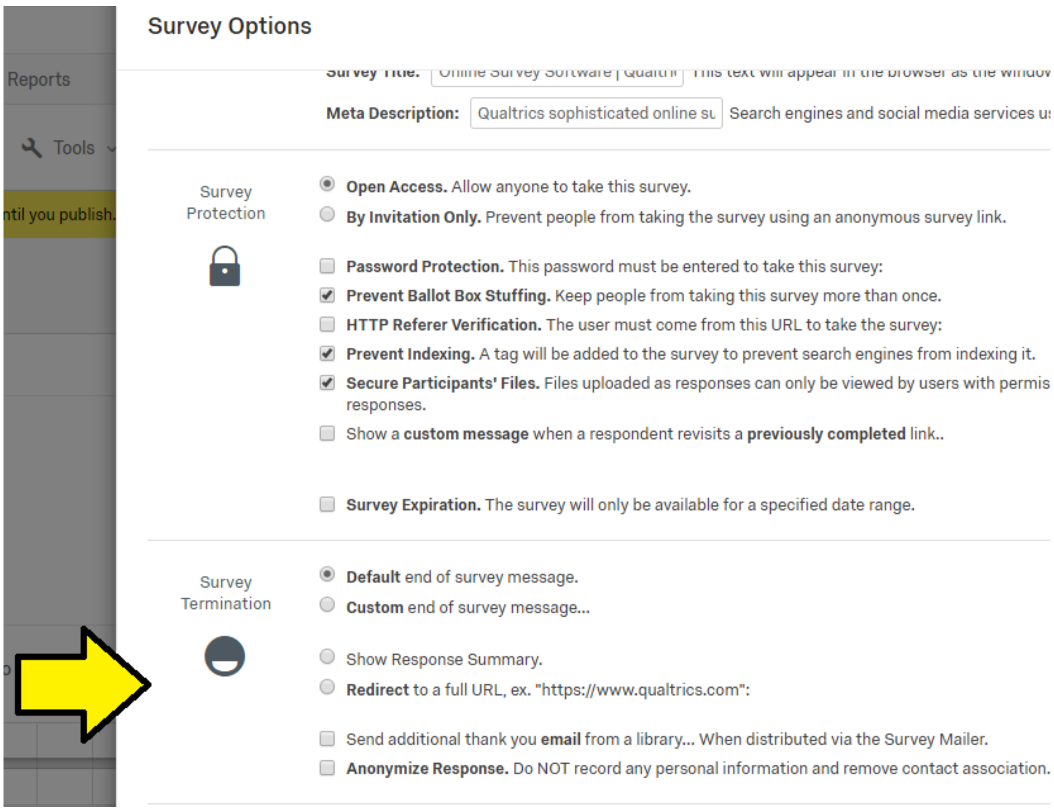
We recommend you use question randomization to limit survey fatigue and to limit biases induced from previous questions.

Question randomization can also be applied at the **survey level**. To access the randomizer tool, click on survey flow. From survey flow, click on add a new element here. Click on randomizer. Then nest your blocks, by using the move button—drag and drop the blocks below the randomizer element.



This will allow your participants to randomly access a set of questions within a block when they start their survey. Your participant may see the default question block or they may see a new question block—they are randomly assigned to one or the other. A key option in the evenly present elements option. It ensures that 50% or your participants will see the default question block or the new question block.

Survey Termination Settings



You can access various survey termination options from the survey options menu.

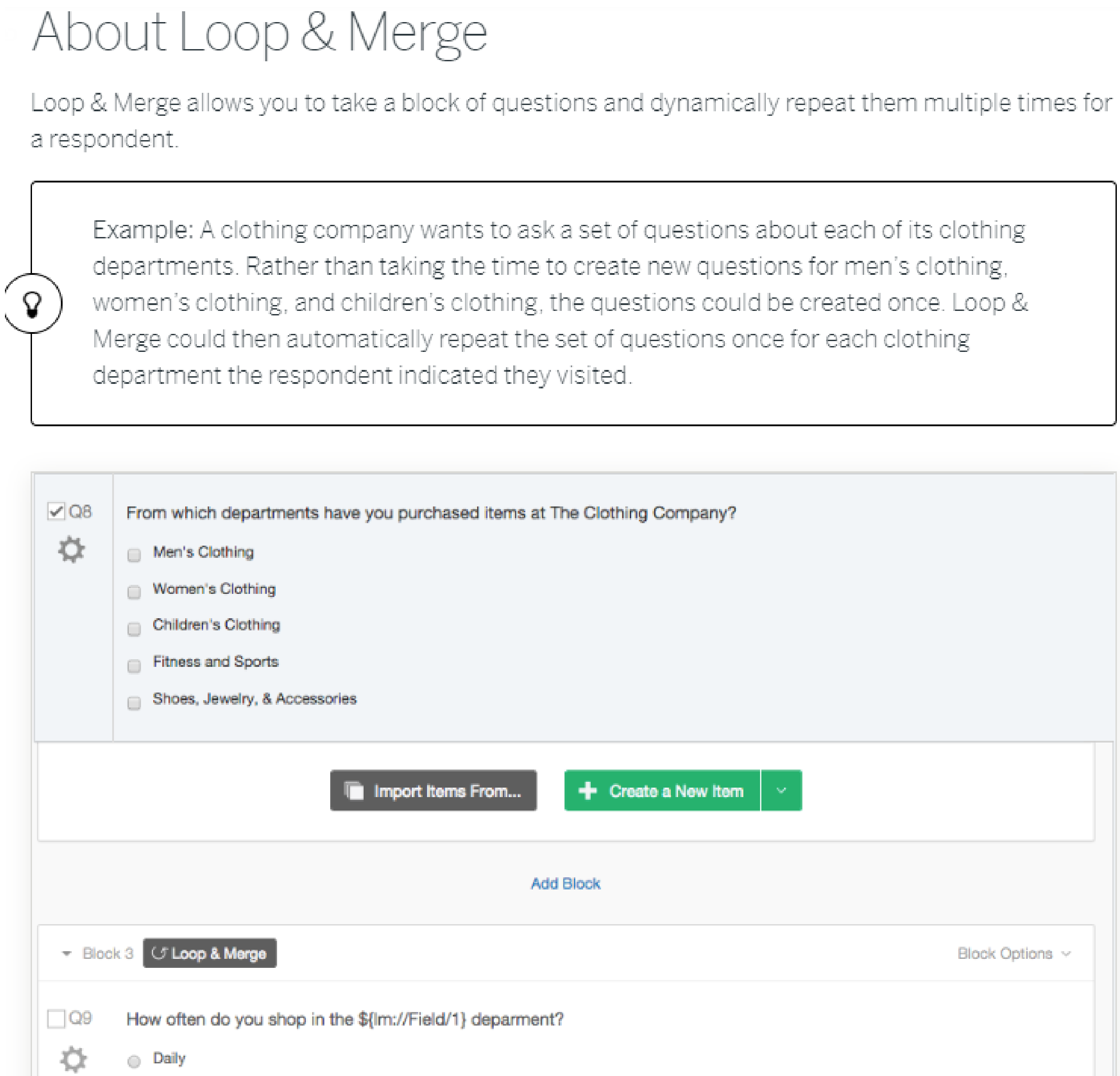
'Show response summary' is particularly useful if your project was an events registration.

If you'd like to '**redirect participants'** to the AWC website, sue the redirect to full URL too.

You can also send your participants a '**custom end of survey message'** and '**anonymize responses**,' if you are conducting a truly anonymous survey.

Evaluating Multiple Products on The Same Scale: Loop and Merge Tool

Tip: in order to use the '**loop and merge**' tool, you will have to use 2 question blocks. The first block will have the question you want to base your loop on. Make sure to set the first question block as '**multiple answer**' so respondents can choose more than one answer—the tool will then circle around and show to the respondents a separate question, in the subsequent block, based on what they answered in the first block. The second block will contain the questions you would like to loop or repeat for each of the previously selected choices.

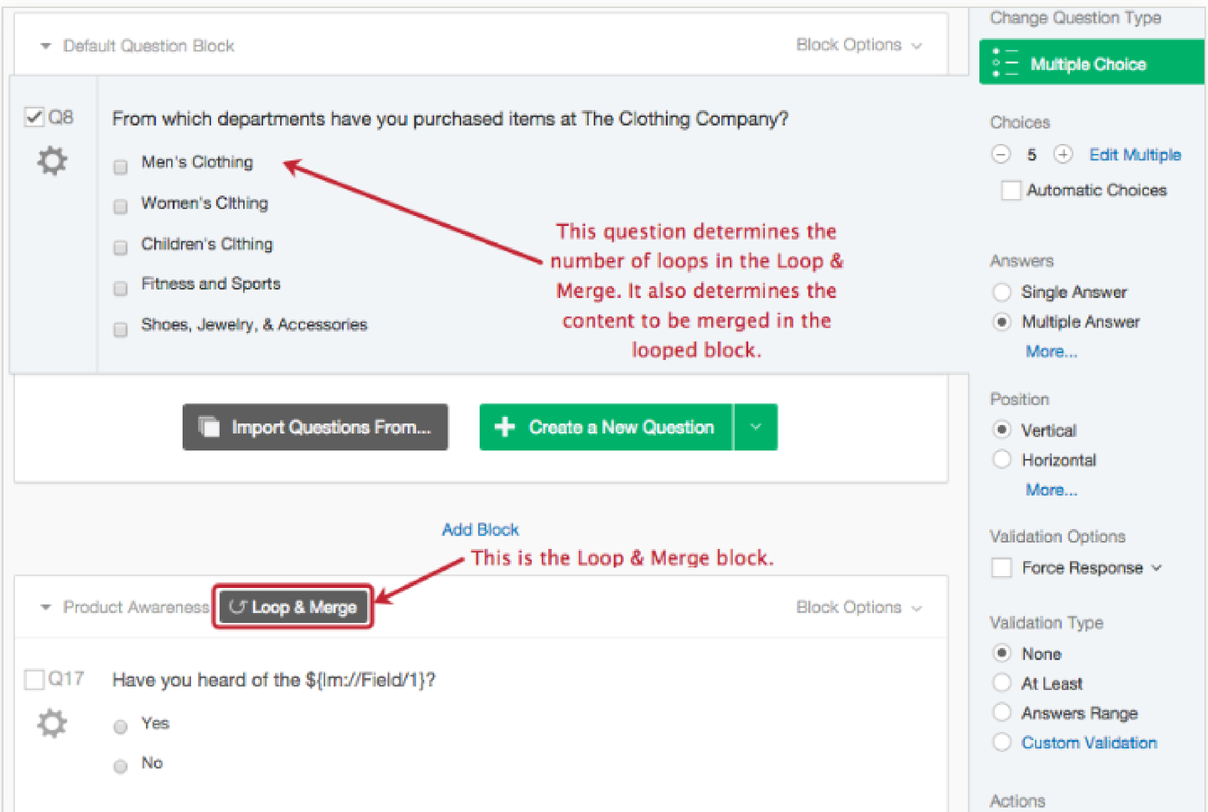


Looping Based on a Question

Looping off of a question allows you to present respondents with the same block of questions once for each of a previous question's choices.

Example: You could ask your respondents which products they typically purchase and then ask them questions about each product.

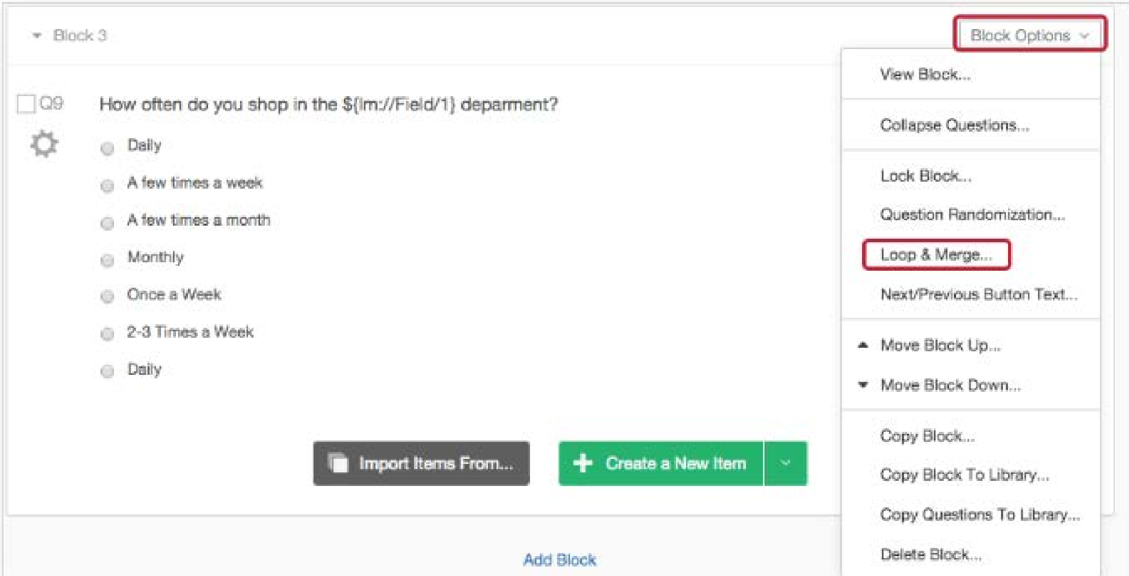
Before setting up this Loop & Merge, you'll need at least two question blocks in your survey. The first block should contain a question that will determine which loops to show to the respondent. The second block will be looped.



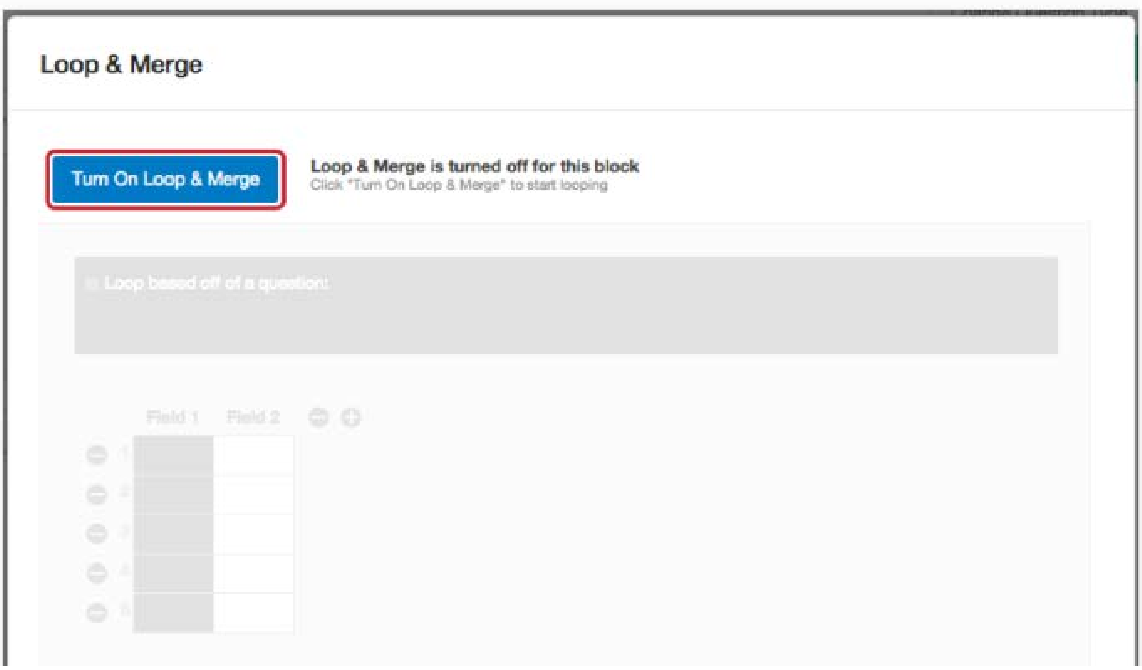
In the first block, respondents are asked which departments they shop in. They will then loop through the Product Satisfaction block once for each department they select.

TO LOOP BASED ON A QUESTION

1 In the Survey tab, click Block Options for the block you want to repeat and select Loop & Merge.



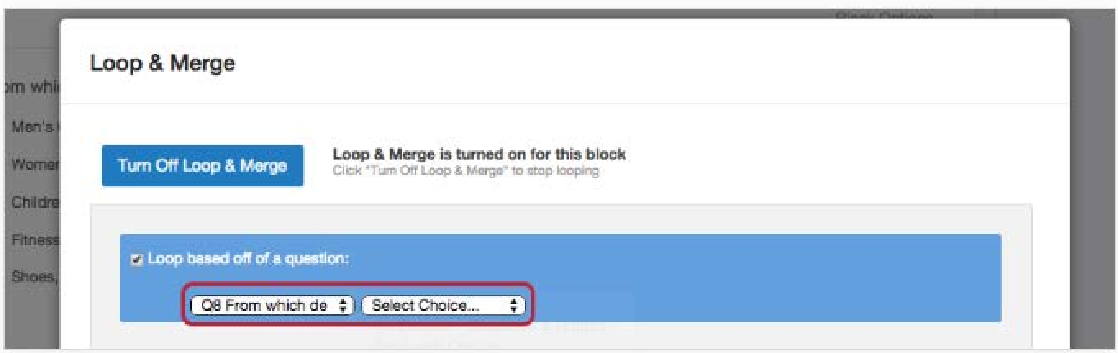
2 Click Turn On Loop & Merge.



3 Click the Loop based off of a question checkbox.

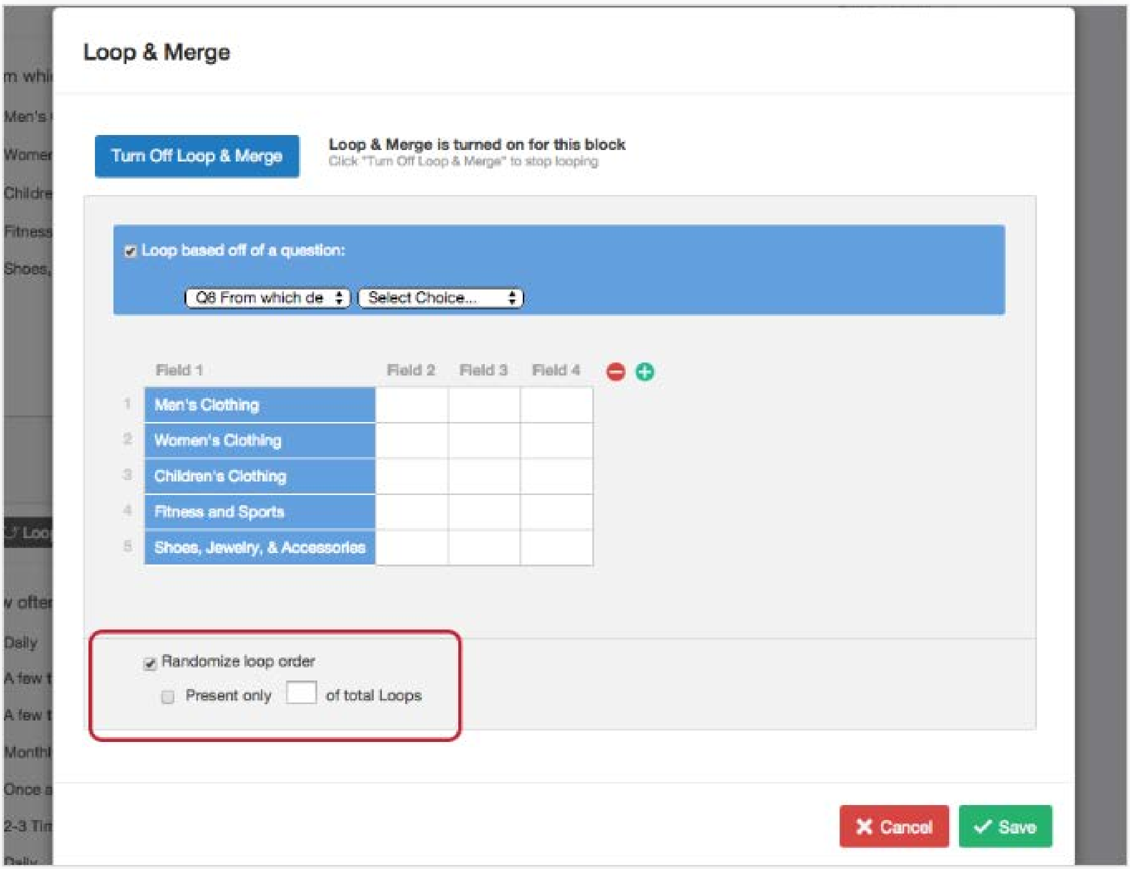
Qtip: A block can be looped based on the following question types: Multiple Choice, Matrix Table, Slider, Side by Side, Text Entry, Rank Order, Constant Sum, Pick Group and Rank, and Hot Spot.

4 Select the question with the information to be looped and choose which answer choices to loop through.



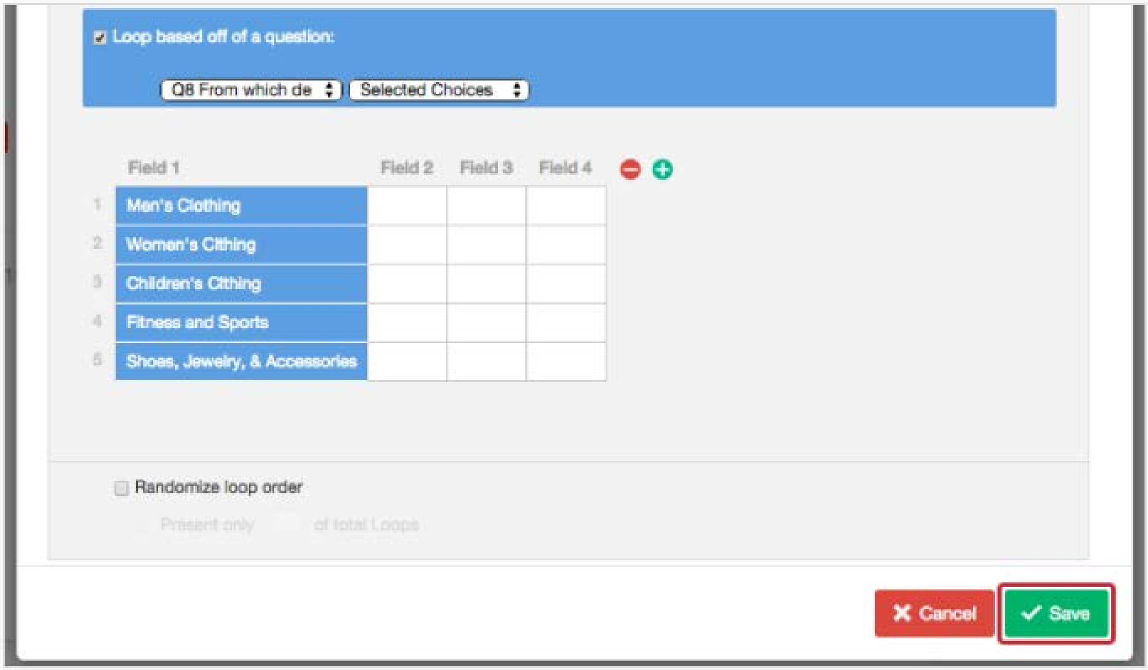
Qtip: The answer options will vary for each question type. For a multiple choice question, for example, choose to loop through All Choices, Displayed Choices, Not Displayed Choices, Selected Choices, or Unselected Choices.

5 If desired, select the Randomize Loop Order checkbox. To limit the number of loops shown to each respondent, select Present only [#] of total Loops.



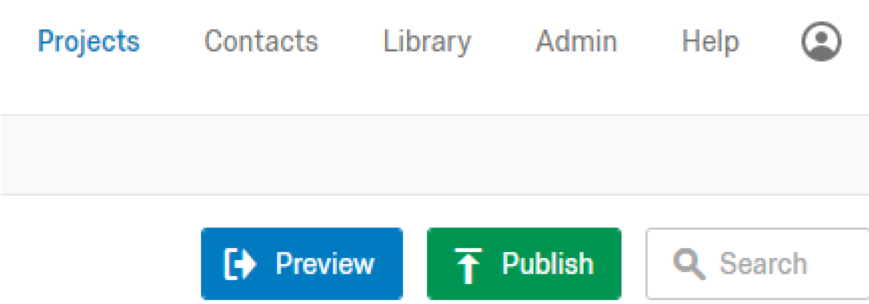
Qtip: Although you can export the responses given for each field, you cannot export the order in which the loops were presented to the respondents.

6 Click Save.

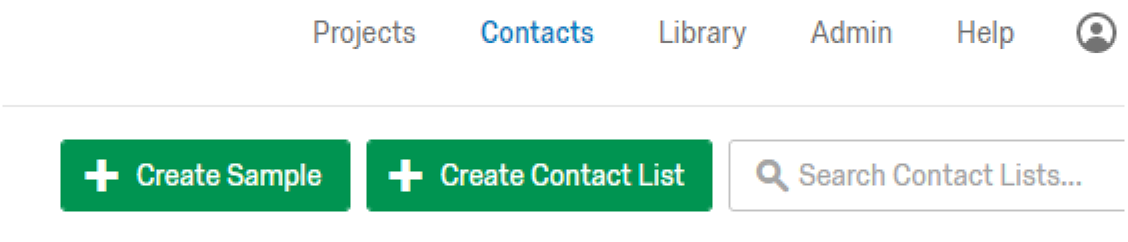


Creating Contact Lists

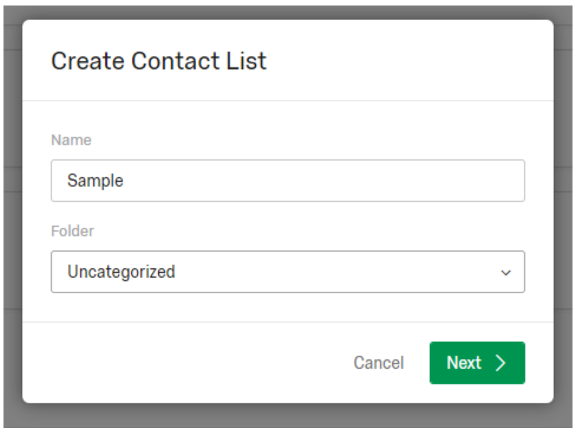
Creating a **contact list** is a simple way that helps you distribute your survey to a long list of people at the same time. Access the **'contacts'** tab on the upper right-hand corner of your screen:



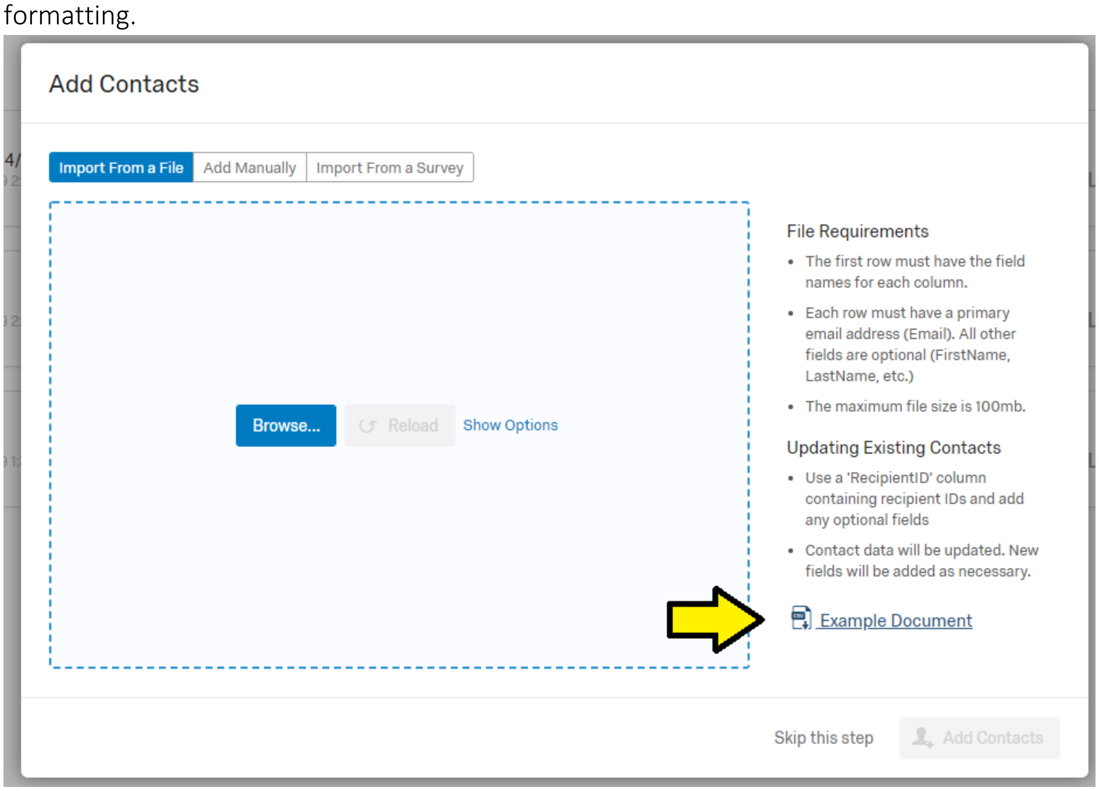
From the contact page, click on create contact list, on the upper right-hand corner.



Name and save in one of your folders.



Then, follow prompted instructions. You can add a **contact list** manually, by adding one by one, or you can import a spreadsheet with a list of names and emails. In order to import a spreadsheet, follow Qualtrics's formatting.



Expected formatting is in this form:

	A	B	C	D	E	F
1	FirstName	LastName	PrimaryEmail	ExternalDataReference	EmbeddedDataA	EmbeddedDataB
2	John	Doe	John_Doe@email.com			
3						
4						
5						
6						

When prompted click on **'consolidate duplicates'**—if a contact was already in the system, their information will update based on new information.