

Center for Teaching, Research and Learning  
Research Support Group  
American University, Washington, D.C.  
Hurst Hall 203  
[rsg@american.edu](mailto:rsg@american.edu)  
(202) 885-3862



## Introduction to Qualtrics

---

### **WORKSHOP OBJECTIVE:**

Qualtrics is an online survey platform that is now available to all AU users. This introductory workshop helps to familiarize users with the basics of the program so that they can begin creating, distributing, and analyzing their own surveys.

### **LEARNING OUTCOMES:**

1. Create an account in Qualtrics
2. Create a simple survey<sup>1</sup>
3. Distribute the survey and collect results
4. Download results into file formats compatible with Excel or SPSS

---

<sup>1</sup>This Workshop assumes that the participant is familiar with the Institutional Review Board (IRB) policies and standards. Before publishing and distributing any survey you create for an academic or personal project, please ensure that the survey meets the standards and requirements set forth by the IRB. More information on IRB standards and requirements can be found at:

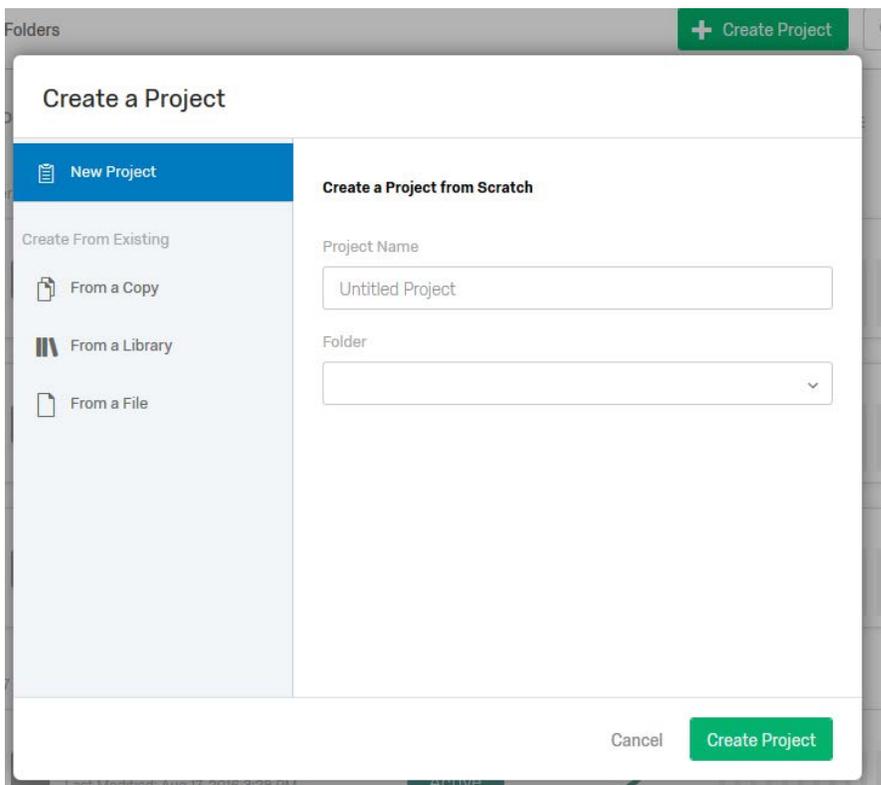
<http://www.american.edu/irb/>

## 1. CREATE A QUALTRICS ACCOUNT

- Any AU student, faculty, or staff member with a valid AU email can set up a Qualtrics account. Go to [american.qualtrics.com](http://american.qualtrics.com) and log-in using your American University username and password (same as the credentials used for the AU Portal).
- If this is your first time logging in, select **I do not have an Account** and follow the prompts.

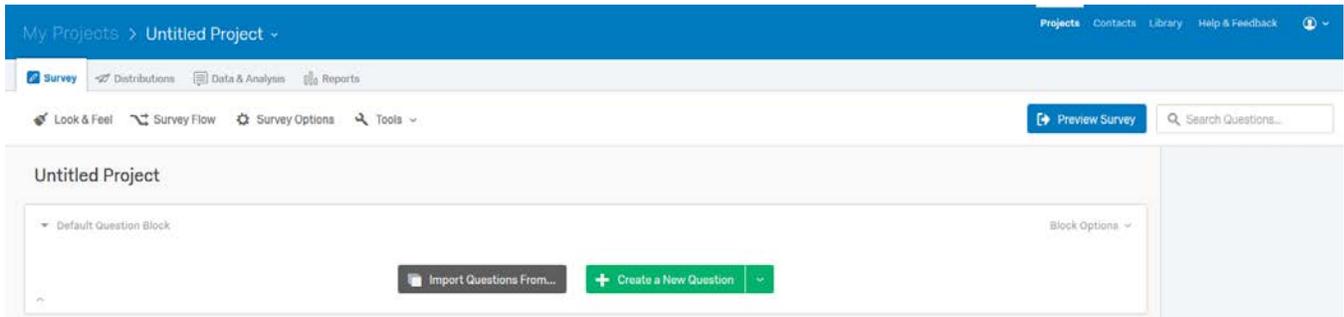
## 2. CREATE A SIMPLE SURVEY

- Select the green **Create Project** button at the top of the screen.
- Choose one of the four options and name your survey and click **Create Project**.

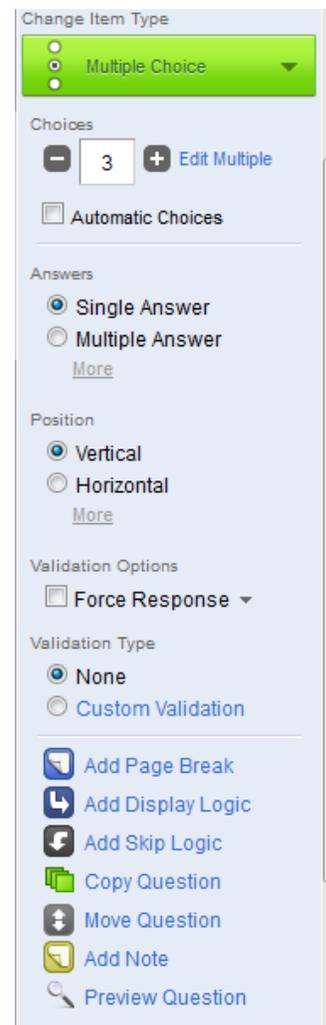
The image shows a screenshot of the Qualtrics 'Create a Project' dialog box. At the top right, there is a green button with a plus sign and the text '+ Create Project'. The dialog box has a title bar 'Create a Project'. On the left side, there is a sidebar with a blue header 'New Project' and four options under 'Create From Existing': 'From a Copy', 'From a Library', and 'From a File'. The main area is titled 'Create a Project from Scratch' and contains two input fields: 'Project Name' with the text 'Untitled Project' and 'Folder' with a dropdown arrow. At the bottom right, there are two buttons: 'Cancel' and 'Create Project'.

- “New Project” lets you create a survey from scratch.
- “From a Copy” if you want to use the same layout as a Qualtrics survey you created previously.
- “From a Library” if you want to select from a number of pre-made surveys that can then be customized.
- “From a File” if you have a survey saved as a .qsf file and want to upload it.
- Let create a “New Project” and name the survey “**Example Survey: Intro Qualtrics**”

## EDITING THE SURVEY



- From the default editing screen, a user has two options for creating questions either using one from the library or creating their own.
  - Let's make the first question ask the following:
    - 1) What is your role at AU?
      - Faculty
      - Staff
      - Student
    - You can add another question by clicking the green **Create a New Question** button
      - 2) How many hours per week did you work on average over the summer?
        - 0-10
        - 10-20
        - 20-30
        - 30-40
        - 40+
      - TIP: When inserting your question choices, you can move from one to the next by using the tab button on your keyboard. If you use the Enter button, it will continue to create new answer choices.
  - When creating your own question, the default is a multiple choice question with three responses.
    - Let's change the second question type by selecting **Change Item Type** and selecting **Slider**.
  - There are a number of options available on the right navigation bar to further customize the question. You can change the:
    - question type
    - the number of choices/responses



- the number of answers provided by respondents
- whether the respondent must answer the question (Force Response)
- force the answer to follow a specific format (Add Validation)
- more (*the options on this menu change to reflect the question type*)
- Note, when editing the text for the responses, Qualtrics will guess and automatically generate additional answers it thinks you intend to use.
  - For example, if your question seems to be a Yes or No question, Qualtrics will automatically make the possible answers “Yes” or “No.”
  - If you manually enter “Like” as the first possible answer, Qualtrics will make the other option “Dislike”. You always have the ability to override the system if the responses are not to your liking.
- Let’s create Question number 3
  - 3) Did you have a summer vacation?
    - Choices should automatically fill in Yes or No

## USING THE PAGE BREAK AND LOGIC FUNCTIONS

- If you would like to have your survey divided between pages, you can do so by adding a page break between the questions where you want the break to occur.
  - Select **Add Page Break** after Question 3
- Qualtrics also includes two different Logic functions to further customize your survey.
  - TIP: Most times you use the word “*if*” when asking a question, you may want to consider using Display or Skip logic.
- **Display Logic** allows you to control when additional questions or content are displayed to a respondent based on their answer to a previous question.
  - There are a series of drop down menus that must be completed before the logic is added to the survey. Below is a sample of the Display Logic Window
  - Let’s create 3 more questions and then add Display Logic to them.
    - 4) Which of the following activities did you do during your vacation? (Check all that apply)
      - Work on academics
      - Travel to exotic locations
    - 5) How productive do you think you were?

- Amazingly
  - Very
  - As could be expected
  - Less than that
  - Blah! Leave me alone.
- 6) To what exotic location did you travel to?
    - [Text Entry Question Type]
- While Question 5 is selected, click **Add Display Logic**.
    - For the conditionals, select If **Question, Q4 Which of the following...**, Choice **Work on academics, Is Selected**
  - Do the same for Question 6, but if **Travel to Exotic Locations, Is Selected**.
  - Note: If you select the check box, **In Page**, the question with the display logic will appear as soon as the question is selected. If the box is unchecked the question will be displayed on the next page of the survey.

- **Skip Logic** allows you to move a respondent to another part of the survey based on their response to a question.
  - Create the following question
    - 7) How much did mundane tasks interfere with enjoying your summer?
  - While Question 3 is selected and highlighted, select **Add Skip Logic**
  - A conditional box will appear within Question 3
    - For the conditions select, If **No** Is **Selected** Then Skip To **How much did mundane (Question7)**
  - If we look at Question 7, at the top left hand corner of the question box there will appear a lavender arrow which indicates that the question has a skip logic function attached to it.

### 3. DISTRIBUTE THE SURVEY AND COLLECT RESULTS

- Qualtrics includes several different options for distributing your surveys.
- When you are ready to distribute a survey click on the **Distributions** tab at the top.
- The most used of these are listed under the **Email** option.
- You are able to either use the internal Qualtrics email system or generate a link to send through your own email account.
  - To use the Qualtrics email system click on **Compose Email**
    - This creates a unique survey link for all of the people to whom you send the email. The recipients email can either be entered individually in the To: box, or you can select a panel of email addresses that you have previously entered.
  - To create a generic link that you can post online or in an email click **Anonymous Link**
    - The only identifiable information collected is the respondent's IP address. If you do not want to collect the IP address, you can always go to the **Survey** tab, click on **Survey Options**, and select **Anonymize Response** under **Survey Termination**.
- There are also options for creating a survey link for use in social media, or to display as a website pop-up window.

### 4. DOWNLOAD RESULTS INTO FILE FORMATS COMPATIBLE WITH EXCEL OR SPSS

- Once you have received the number of responses you need, or the survey has ended, you can download the raw data for analysis.
- Click on the **Data & Analysis** tab or the **Reports** tab
  - **Reports** lets you review the aggregate results in Qualtrics
  - **Data & Analysis** lets you review individual responses and download the data
- To download data click on the **Export/Import** link at the top right of the **Data & Analysis** tab and select **Export Data** then **Data Table**.

The screenshot shows the Qualtrics interface with the 'Data & Analysis' tab selected. The top navigation bar includes 'Survey', 'Distributions', 'Data & Analysis', and 'Reports'. Below the navigation bar, there are icons for 'Data', 'Text', and 'Cross Tabs'. The main content area shows a data table with the following structure:

<input type="checkbox"/>	Recorded Date	SEMESTER - Semester?	Actions
<input type="checkbox"/>	Aug 8, 2016 3:25 PM	SUM	<input type="button" value="v"/>
<input type="checkbox"/>	Aug 8, 2016 3:25 PM	SUM	<input type="button" value="v"/>

Additional interface elements include 'Add Filter', 'With Selected', 'Page 1 of', 'Export & Import', and 'Tools' buttons.

- The two most useful data formats are:
  - CSV
  - SPSS

## **OTHER NOTES**

- Qualtrics is a browser based program that can be used on computers and mobile devices.
- Assistance with Qualtrics is also available in the CTRL lab during normal business hours. For more information, go to <http://www.american.edu/ctrl/lab.cfm>
- For a full list of our other workshops, go to <http://www.american.edu/ctrl/rsgevents.cfm>
- This Workshop assumes that the participant is familiar with the Institutional Review Board (IRB) policies and standards. Before publishing and distributing any survey you create for an academic or personal project, please ensure that the survey meets the standards and requirements set forth by the IRB. More information on IRB standards and requirements can be found at: <http://www.american.edu/irb/>
- The CTRL lab staff are happy to discuss survey design and methodology further. Stop by the lab or email your questions to [rsg@american.edu](mailto:rsg@american.edu)

Paper Copy of Intro to Qualtrics Survey:  
Summer Vacation Survey

1. What is your role at AU?
  - a. Faculty
  - b. Staff
  - c. Student
  
2. How many hours per week did you work on average over the summer?
  - a. 0-10
  - b. 10-20
  - c. 20-30
  - d. 30-40
  - e. 40+
  
3. Did you have a summer vacation?
  - a. Yes
  - b. No

If “No”, then go to question 7, otherwise answer the following questions.

4. Which of the following activities did you do during your vacation (check all that apply):
  - a. Work on academics
  - b. Travel to exotic locations
  
5. If you worked on academics, how productive do you think you were?
  - a. Amazingly
  - b. Very
  - c. As could be expected
  - d. Less than that
  - e. Blah! Leave me alone
  
6. If you went to an exotic location, to what exotic location did you travel?
  
7. How much did mundane tasks interfere with enjoying your summer?