Qualtrics Design

“Building a Survey”

Contents

Getting Started

- Beginner and advanced survey building webinars (On-Demand Training) are available at https://basecamp.qualtrics.com/?utm_lp=support-on-demand-webinars-redirect.

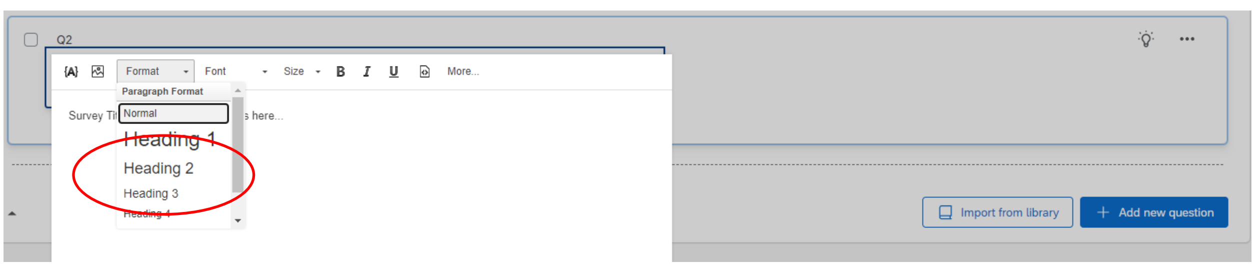
- Chrome is the best browser to use for Qualtrics.

Set Up

- Log into Qualtrics (https://tamu.qualtrics.com/login/identity-provider-select?path=%2FControlPanel%2F&product=ControlPanel&stateID=025add21-3fce-47c5-bcb7-3e46a067fbc0), selecting My organization's single sign-on (SSO).
- Select create a new project bottom left. Disregard the options on the left and select Survey (Create a project from scratch)
- Select Get started (lower right)
- Under Name -> Untitled project, copy the Survey Title from the Trello Card and paste it there with your initials at the end of the survey title. Then click "Create Project".
- It will take you to the first page of a new survey to build the survey. First click on "Look & Feel" (top left) and then go to "General" in look and feel. Where it says "Next Button Text", we prefer to remove the right arrow and replace it with the word "Next", and the same for the "Back Button Text" type in "Back". Change "Progress Bar" to With Text or With Verbose Text according to your wishes. Then click Apply.
- Click on "Survey Options" and go to the "Responses" option. Check the "**Back Button"** box and change "Incomplete survey responses" to after 6 months.
- Survey Options → Security → hit prevent multiple submissions, bot detection, and security scan monitor

Introductions or Descriptive Text (Survey Title)

- Moving on to the next "question". Click on "Add new question". This time you are looking for "Text/Graphic". Select that option.
- Once created, this box is where you will put the introduction (title, information, and instruction of survey) that is listed in the Word document provided for the task.
- To edit the question, click on the text. You will notice tabs pop up above the question, click the "Rich Content Editor" tab. Formatting consistency/continuity depends on making edits IN "Rich Content Editor"
- Copy the info provided in the Word doc to paste into the "Rich Content Editor" text box section. Copy/paste avoids unnecessary typos.
- Highlight "Click to write the question text". Paste the copied info provided in the Word doc.
- Remove the formatting from the copied text before formatting in rich content editor.
- Once you have pasted that text into the box, you need to format the content. Click on the text in the box, select Rich Content Editor, → Format, →Heading 2. That heading style can be changed but start there. Be sure to attach a logo (inserted picture) if the survey requires one.
- If the logo isn't in the library, click upload new graphic (top right green option), select choose file, look for the logo (copy the logo path from Trello card) , click open, then save.

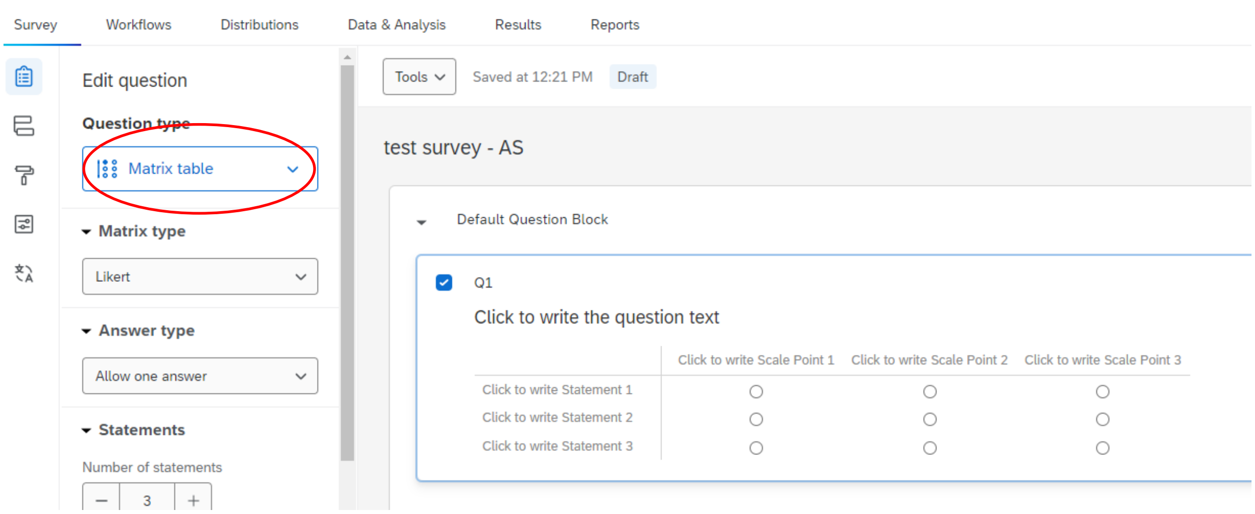


Adding Questions

- Hover over the “text/Graphic” Heading question. Below that question you will see “Add page break”. Click “Add page break”. That is often the norm for SAPAR surveys, but follow your own needs.
- Repeat the process by adding each new question as needed.
- If the question is multiple choice, then copy the question from the Word document and paste it where it says “Click to write the question text”. Note: You do not have to go into rich content editor when no formatting of the text is required. Make sure that after you have pasted the text to remove the formatting from the question text. Then go on to copy and paste the choices provided in the Word document.

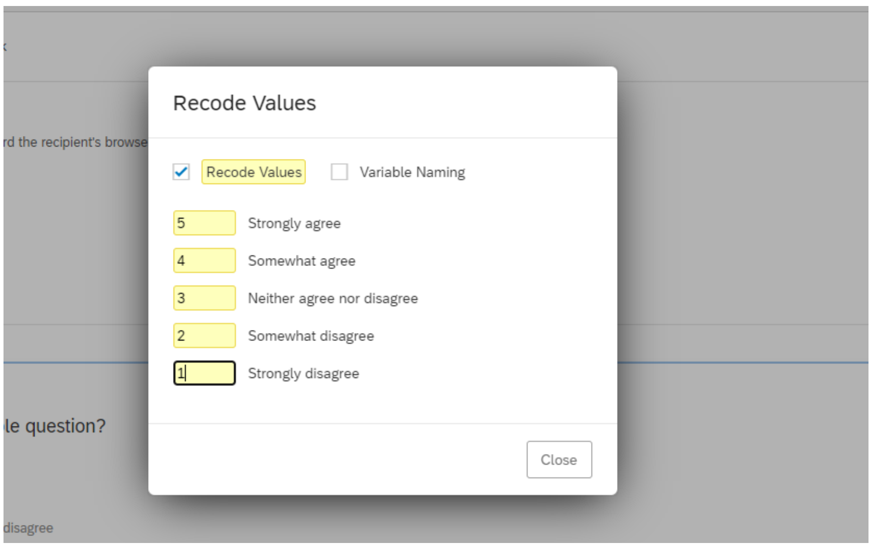
Matrix Table

- If the survey requires a matrix table, click on create a new question, then go to the right side of the screen and click the drop-down arrow and a list of different types of questions will show up. Click on Matrix Table (it will default to the type of Matrix Table we typically use in the office). SAPAR rarely uses matix tables as they are not as accessible in mobile devices (phones) as single multiple choice question forms.



Recode Values and Variable Naming

- Copy the statements and scale provided in the design Word document if available. SAPAR routinely reverses the Qualtrics default scale codes. To recode a five point scale from **1,2,3,4,5** to **5,4,3,2,1** right click on the question and click on Recode Values or go the left side panel→ select builder→ scroll to the very bottom→select Recode values. Check the box that says Recode Values. Then go into each yellow box and change the coding values. To get the full list of coding, refer to Coding instructions for the SAPAR preferred coding on all questions noted below.



Making a Copy of a Survey in Qualtrics

Create a new project → From Scratch Survey → Get Started → Copy a Survey from an existing project→ give it a new title & create

SAPAR Coding Guidelines for Survey Design (Qualtrics)

General Guidelines

- Higher values should correspond to more positive responses.
- Anything with two response options should be coded 0/1.
    a) 1=Yes
    b) 0=No
    c) 1=Female
    d) 0=Male

- If there are more than two response options, it would follow the pattern of two response options for responses to be consistent and the third item would be coded as 2. However, if it is just a straight list of three or more response options, coding would begin at 1.

○ 0=Male	○ 0=No	○ 1=Monday
○ 1=Female	○ 1=Yes	○ 2=Tuesday
○ 2=Transgender	○ 2=Unknown or Unsure	○ 3=Wednesday

- Unsure/uncertain/maybe should be coded as part of the scale.

    - 6=Almost Always
    - 5=Frequently
    - 4=Sometimes
    - 3=Infrequently
    - 2=Almost never
    - 1=Unsure

Non-Data Responses

- N/A or Did Not Attend should be coded as 98; and then would be excluded from analysis.
    - 5=Definitely yes
    - 4=Yes
    - 3=Maybe
    - 2=No
    - 1=Definitely no
    - 98=Not applicable or Did Not Attend
- Prefer not to answer should be included in the analysis and coded appropriately.

Time Ranges

- A range of hours should be coded as the mid-point of that range so that when a mean is calculated, it corresponds to a meaningful number of hours.
    - 0=0 hours
    - 5=1-10 hours
    - 15=11-20 hours
    - 25=21-30 hours
    - 35=31 hours or more

Checklist

Qualtrics provided guidance regarding issues that may arise with recoding, especially if a matrix question type is used. Please be aware:

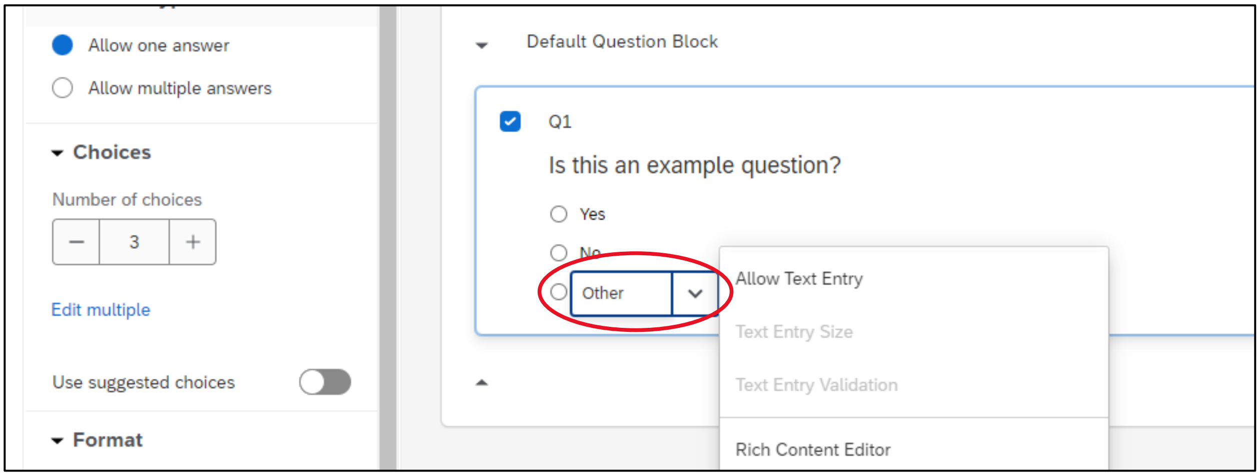
- **Order of Answer Choices**: Recode values are assigned in the order the answer choices are created. If you delete and add new choices, the recode values might get reassigned. Ensure that you are not inadvertently changing the order of the answer choices.

- **Locking Recode Values**: Before you start collecting responses, make sure to lock the recode values by selecting the **Recode Values** checkbox in the Recode Values menu. This will prevent them from resetting to sequential order.

- **Publishing Changes**: Ensure that you are publishing your changes correctly after recoding the values. Sometimes, changes might not be saved if the survey is not published properly.

- **Resetting Recode Values**: If the issue persists, you might want to reset all recode values and start over. Go to **Tools** and select **Reset Recode Values**. This will remove the recode values and your data will calculate based on default choice IDs.

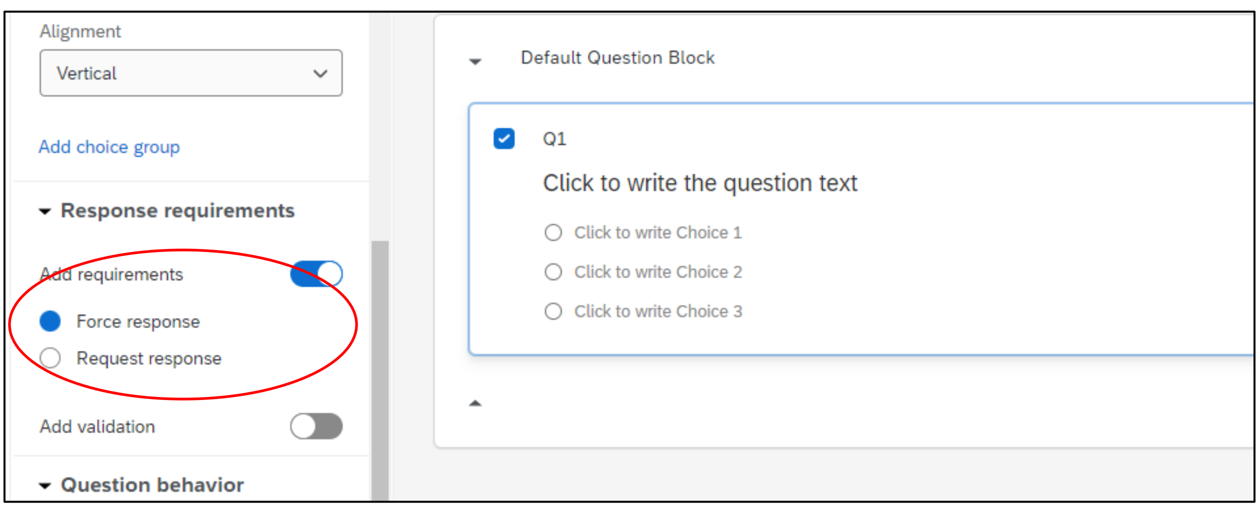
Check-All-That Apply/Text Box for “Other” Option



- If you have a check-all-that apply question, make sure to select Multiple Answer on the bar that is on the left side of screen. Note: The choices will no longer have circles next to them, but instead will have squares to indicate a multiple answer list. If there is a text box that needs to be added to an “Other” answer choice, click on the text “Other” and click the answer choice drop down arrow → click Allow Text Entry on the top of the list. The text entry size can be modified by clicking on the drop-down arrow→ selecting text entry size → selecting the appropriate sizing.

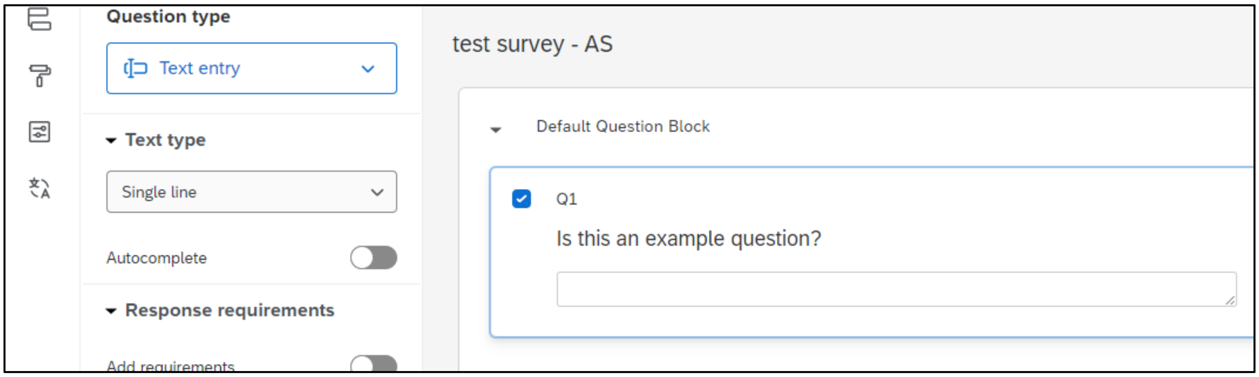
Forced Response

- For a question that needs to be a forced response, go to the menu on the left side of the screen → scroll down to Response requirements → select add requirements → check the Force response option.



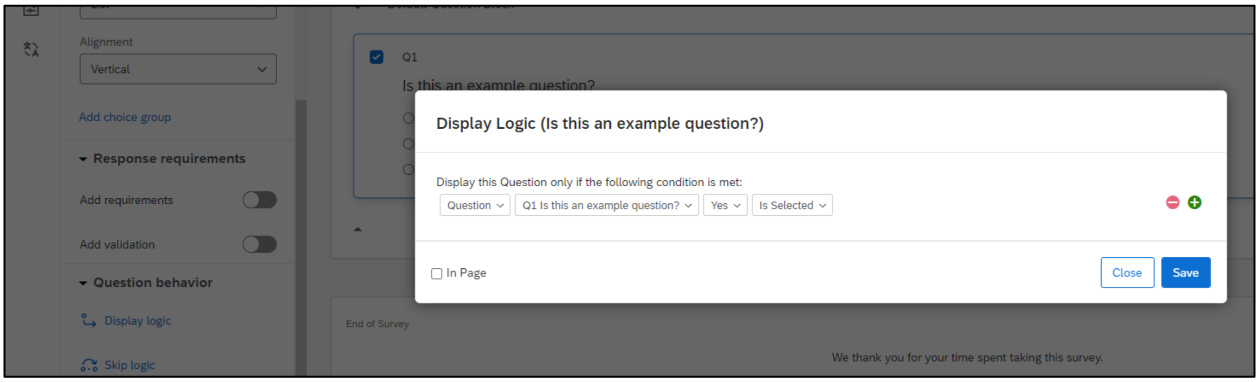
Text Entry

- If a question is text entry, click the drop down list of the different question types and select Text Entry. You will notice a list of different text types shows up on the menu. For text entry questions we typically default to “Essay Text Box”.



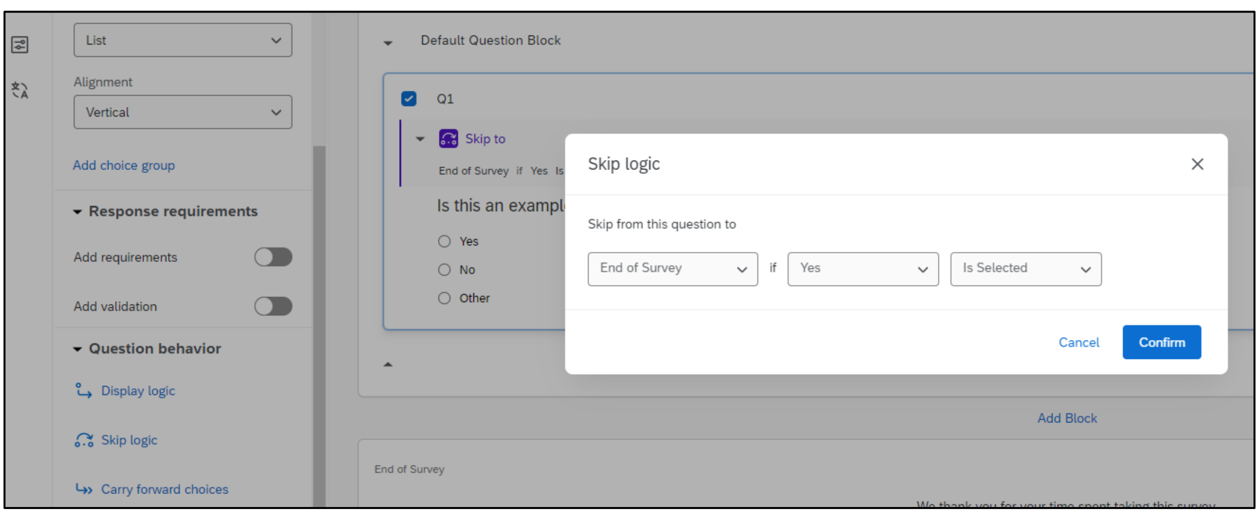
Display Logic

- If the Word document indicates that a question needs display logic, select the question that will need to pop up. Click the Question Behavior drop down list on the left side and click on Display Logic or right click on the question and select Display logic. Select the question-and-answer choice that will trigger the display logic. If the question needs to pop up in the page, click on the In Page box on the bottom left. Click Save.



Skip Logic

- If the Word document indicates that a question needs skip logic, select the question that will cause the skip. Click the Question Behavior drop down list on the left side and click on Skip Logic or right click on the question and select Skip logic. Select the answer choice that will cause the skip and indicate which question it needs to skip to.

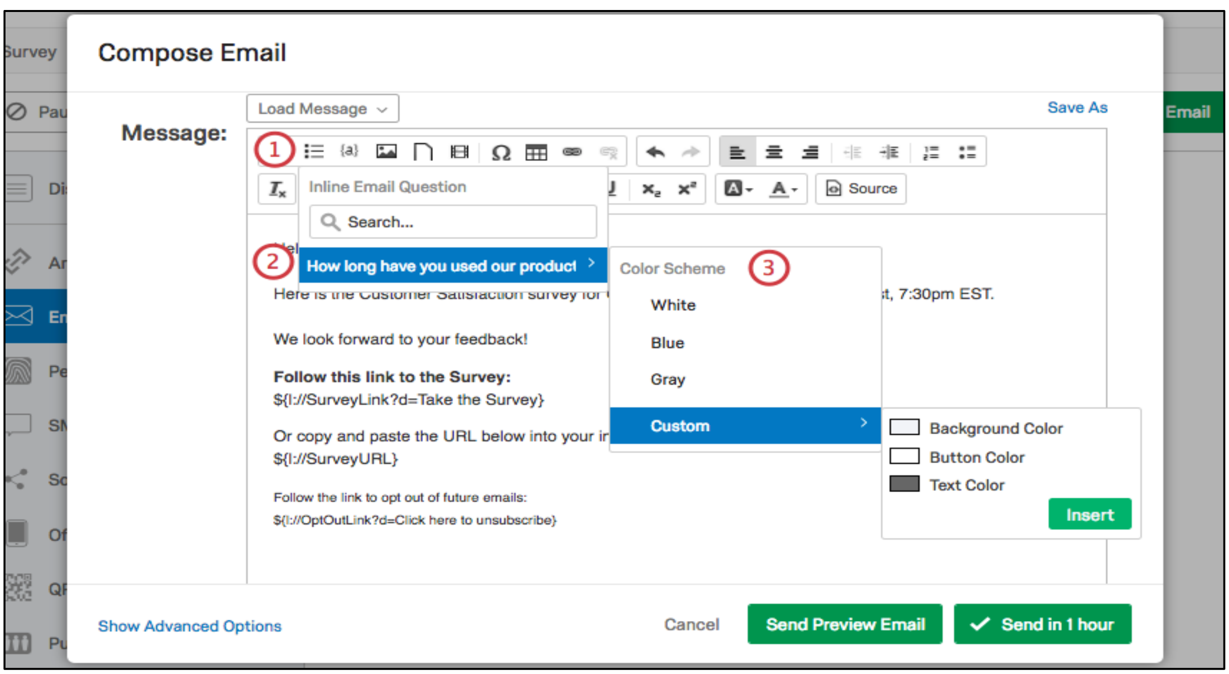


Embedded & Piped Data

- If the Word document indicates that the question needs piped/embedded text from the Contact List, click on the {a} “insert piped text” symbol in rich content editor. I will display all the possible options to input from the contact list. This will allow you to pull data fields from the contact list to display in the question. NOTE: The field from your contact list must match the options that are displayed in Qualtrics.
    - Inserting First/Last name: click on contact field and select first/last name. It should display as ${m://FirstName}. This will allow the recipient’s name be displayed when they take the survey.
    - Inserting other fields: Other fields such as Organization, Company, UIN, etc., must be put in by selecting embedded data field, especially as display or skip logic may be dependent on these embedded fields. Select this option and type in your desired data field EXACTLY HOW IT IS DISPLAYED IN CONTACT LIST.

Online Email Questions

- Including a survey question in your email message can enhance your survey invitation. It’s more engaging and interactive, effectively increasing your response rate. When your participants receive the email, they’ll be able to click an answer to your inline question right from the body of the email. Clicking on an answer will immediately launch the survey in another tab, with their chosen answer already selected for them.
- **Qtip:** Only Single Answer Multiple Choice and NPS® question types are available for use as Inline Email Questions. Questions with Skip Logic or Question Display Logic will also not be included.



To Insert an Inline Email Question

- Select the Inline Email Question icon in the Message editor.
- Select which Multiple Choice or NPS® question from your survey you would like to insert.
- Warning: If your Single Answer Multiple Choice question has images as answer choices, you will need to make sure the images were added through the Rich Content Editor. Adding images through the Rich Content Editor will ensure the proper HTML code has been applied for the image to pull through in your email.
- Select the color scheme of this question or choose Custom to design one yourself (includes color options for background, buttons, and text).

Qtip: Inline email questions can be added from the Distributions tab within a project. They cannot be added or edited within the Messages library.

- Scroll down to Current Loop and hover
- the content of Q3 is what (also) appears to select
- select that (content of Q3) and the Piped Text should work