

Step-by-Step Guide for Beginners Using Qualtrics Survey Tool

This guide is designed for beginners who are using the Qualtrics survey tool for the first time to create a simple survey using branching and skip logic. The examples provided focus on surveying children's responses in a school setting.

We recommend reading through each step before attempting to engage with carrying out the instructions in the Qualtrics programme; the examples given at the end of each step can help to contextualise what you are required to do in that step.

If you have any problems or anything is unclear, please feel free to ask for help – either from the instructor or you can ask Co-pilot on your computer to give you a simple explanation to what you are stuck on. We also recommend working with others on this task, although it is better for your learning if you actively engage with the programme rather than merely being a passive member of a group.

Feel free to explore all the options available to you up to Step 7 of this guide; you cannot break the programme and there are no consequences to you making mistakes or clicking the wrong button! Once you get to Step 7 however, please bear in mind that this is where 'survey distribution' comes in and at this point there is the potential for others to see your survey. We will discuss the ethical and practical implications for this step as you get close to engaging with it.

Step 1: Create a New Survey

1. Log in to Qualtrics

- **Access the Website:** Open your web browser and go to the Qualtrics website.
- **Enter Credentials:** Log in using your UWTSD username and password sent to you from Psychlabs.

2. Create a New Project

- **Dashboard Overview:** Once logged in, you'll be taken to your dashboard. This is where you can see all your existing projects and create new ones.
- **Create Project Button:** Look for the "Create Project" button, usually located at the top right corner of the dashboard. Click on it to start a new project.

3. Select Survey

- **Project Options:** After clicking "Create Project", you'll be presented with several options for different types of projects (e.g., survey, feedback, employee engagement).
- **Choose Survey:** Select "Survey" from the list of options. This will set up your project specifically for creating a survey.

4. Name Your Survey

- **Project Naming:** You'll be prompted to enter a name for your survey. Choose a name that clearly reflects the purpose of your survey (e.g., "Student Feedback Survey").
- **Create Project:** After naming your survey, click "Create Project". This will take you to the survey editor where you can start building your survey.

Step 2: Add Questions

1. Add a Question

- **Locate the Question Pane:** On the survey editor page, you'll see a pane on the right side where you can add questions.
- **Create a New Question:** Click on the "Create a New Question" button. This will open a new question box in your survey.

2. Select Question Type

- **Question Types:** Qualtrics offers various question types such as multiple choice, text entry, matrix table, rank order, and more.
 - **Multiple Choice:** Allows respondents to select one or more options from a list.
 - **Text Entry:** Provides a text box for respondents to type their answer.
 - **Matrix Table:** Lets respondents rate multiple items using the same scale.
 - **Rank Order:** Enables respondents to rank items in order of preference.
- **Choosing the Type:** Click on the dropdown menu in the question box to select the type of question you want to add.

3. Enter Question Text

- **Question Text Box:** In the question box, you'll see a text area labelled "Question Text".
- **Typing Your Question:** Click inside the text area and type your question. Make sure your question is clear and concise.

4. Add Answer Choices

- **Answer Choices Section:** For multiple-choice questions, you'll see an area below the question text where you can add answer choices.
- **Adding Choices:** Click on "Click to write Choice 1" and type your first answer option. Repeat this process for additional choices.
- **Formatting Choices:** You can format your answer choices using bold, italics, or other text styles to make them stand out.

5. Advanced Options

- **Validation:** You can set validation criteria for your questions to ensure respondents provide appropriate answers (e.g., requiring a numeric response).

- **Display Logic:** Use display logic to show or hide questions based on previous answers. This is useful for creating dynamic surveys.
- **Customizing Questions:** Qualtrics allows you to customize questions further with options like adding images, videos, or descriptive text.

Example

Let's say you want to add a multiple-choice question asking students about their favourite subject.

1. **Add a Question:** Click "Create a New Question".
2. **Select Question Type:** Choose "Multiple Choice".
3. **Enter Question Text:** Type "What is your favourite subject?".
4. **Add Answer Choices:** Enter options like "Maths", "Science", "English", and "History".

Step 3: Organize Your Survey with Blocks

1. Add Blocks

- **Understanding Blocks:** Blocks in Qualtrics are used to group related questions together. This helps in organizing your survey and making it easier to manage.
- **Adding a Block:** On the survey editor page, look for the "Add Block" button, usually located at the bottom of the question list or in the survey flow section.
- **Naming Blocks:** After adding a block, you can rename it to reflect its content (e.g., "Demographics", "Academic Performance"). Click on the block name to edit it.

2. Move Questions to Blocks

- **Drag and Drop:** To move questions into a block, simply click and hold the question you want to move, then drag it into the desired block.
- **Reordering Questions:** You can also reorder questions within a block by dragging them up or down. This helps in structuring your survey logically.
- **Copying Questions:** If you need the same question in multiple blocks, you can copy it by clicking on the question options (three dots) and selecting "Copy Question". Then, paste it into the desired block.

3. Using Blocks for Branching

- **Branching Logic:** Blocks are particularly useful when setting up branching logic. You can create different paths in your survey based on respondents' answers and direct them to specific blocks.
- **Survey Flow:** Click on the "Survey Flow" button at the top of the page to see an overview of your survey structure. Here, you can add branches and move blocks around to create a dynamic survey experience.

Example

Let's say you want to create a survey with sections for demographics and academic performance.

1. **Add Blocks:** Click "Add Block" twice to create two new blocks.
2. **Name Blocks:** Rename the first block to "Demographics" and the second block to "Academic Performance".
3. **Move Questions:** Drag demographic-related questions (e.g., age, grade) into the "Demographics" block. Drag academic-related questions (e.g., favourite subject, study habits) into the "Academic Performance" block.

4. **Reorder Questions:** Arrange the questions within each block to ensure a logical flow.

Step 4: Apply Branch Logic

1. Go to Survey Flow

- **Access Survey Flow:** In the survey editor, click on the "Survey Flow" button at the top of the page. This will open a new view where you can see the overall structure of your survey.

2. Add a Branch

- **Add New Element:** Click on "Add a New Element Here" at the point in the survey flow where you want to add the branch.
- **Select Branch:** From the dropdown menu, select "Branch". This will create a new branch element in your survey flow.

3. Set Conditions for the Branch

- **Define Conditions:** Click on "Set a Condition" within the branch element. You can set conditions based on respondents' answers to previous questions. For example, if you want to display a block only if a respondent answers "Yes" to a previous question, set that condition here.
 - **Condition Builder:** Use the condition builder to specify the logic. You can choose the question, the condition (e.g., equals, contains), and the value (e.g., "Yes").
 - **Multiple Conditions:** If needed, you can add multiple conditions by clicking "Add a Condition" again. You can use "AND" or "OR" logic to combine conditions.

4. Add Blocks to Branch

- **Drag and Drop:** Drag the relevant blocks into the branch element. This means the blocks will only be shown if the conditions you set are met.
 - **Nested Branches:** You can also create nested branches within a branch for more complex logic. Simply add another branch element within the existing branch and set its conditions.

- **Reorder Elements:** Ensure the branch and blocks are in the correct order within the survey flow.

Example

Let's say you have a survey with a block of questions about academic performance that you only want to show to students who indicate they have a favourite subject.

1. **Go to Survey Flow:** Click "Survey Flow" at the top of the survey editor.
2. **Add a Branch:** Click "Add a New Element Here" and select "Branch".
3. **Set Conditions:** Set the condition to display the block if the respondent answers "Yes" to the question "Do you have a favourite subject?".
 - **Condition Builder:** Select the question "Do you have a favourite subject?", choose "Equals" as the condition, and enter "Yes" as the value.
4. **Add the Block:** Drag the "Academic Performance" block into the branch.
5. **Nested Branch Example:** If you want to add another layer of logic, such as showing additional questions only if the respondent rates their favourite subject highly, you can add another branch within the "Academic Performance" block.
 - **Add Nested Branch:** Click "Add a New Element Here" within the "Academic Performance" branch and select "Branch".
 - **Set Nested Conditions:** Set the condition to display the additional questions if the respondent rates their favourite subject 4 or 5 stars.
6. **Reorder Elements:** Ensure all elements are in the correct order and nested properly.

Step 5: Apply Skip Logic

1. Select a Question

- **Choose the Question:** In the survey editor, click on the question you want to apply skip logic to. This is typically a question whose answer will determine whether respondents skip to another part of the survey.

2. Add Skip Logic

- **Question Options:** Click on the question options (usually represented by three dots or a gear icon) to open the menu.
- **Skip Logic Option:** Select "Skip Logic" from the menu. This will open the skip logic settings for the question.

3. Set Conditions

- **Define Conditions:** In the skip logic settings, you can define the conditions under which respondents will skip to another question or block. For example, if you want respondents who answer "No" to skip a section, set that condition here.
 - **Condition Builder:** Use the condition builder to specify the logic. Choose the answer option (e.g., "No") and set the action (e.g., skip to a specific question or block).
 - **Multiple Conditions:** You can add multiple conditions if needed. For example, you might want respondents who answer "Yes" to go to one section and those who answer "No" to skip to another.

4. Choose Destination

- **Select Destination:** After setting the conditions, choose the destination question or block where respondents should be directed. This can be a specific question, the next block, or even the end of the survey.
 - **Dropdown Menu:** Use the dropdown menu to select the destination. Ensure you choose the correct question or block to maintain the survey flow.
 - **Preview Destination:** You can preview the destination to ensure it aligns with your survey logic.

Example

Let's say you have a question asking students if they have used you're a specific website, and you want those who answer "No" to skip the website feedback section.

1. **Select a Question:** Click on the question "Have you used this website?".
2. **Add Skip Logic:** Click on the question options and select "Skip Logic".
3. **Set Conditions:** Set the condition to skip if the respondent answers "No".
 - **Condition Builder:** Choose "No" as the answer option and set the action to skip to the next relevant question or block.
4. **Choose Destination:** Select the destination question or block where respondents should be directed if they answer "No".

Step 6: Preview and Test Your Survey

1. Preview Survey

- **Preview Button:** In the survey editor, click on the "Preview" button, usually located at the top right corner of the page. This will open a new window where you can see how your survey will appear to respondents.
- **Simulate Responses:** Use the preview mode to simulate different responses. This helps you check the flow of the survey and ensure that all questions, branching, and skip logic work correctly.
- **Mobile Preview:** Qualtrics allows you to preview your survey on different devices. Click on the mobile preview option to see how your survey looks on smartphones and tablets.

2. Test Logic

- **Test Branching Logic:** Go through the survey and test the branching logic by selecting different answers. Ensure that respondents are directed to the correct blocks based on their responses.
- **Test Skip Logic:** Similarly, test the skip logic by selecting answers that should trigger skips. Verify that respondents are correctly directed to the specified questions or blocks.
- **Check Display Logic:** If you have applied display logic, ensure that questions or blocks are shown or hidden based on the conditions you set.

3. Review Survey Flow

- **Survey Flow Overview:** Click on the "Survey Flow" button to review the overall structure of your survey. Ensure that all elements are in the correct order and that the logic flows smoothly.
- **Adjustments:** If you notice any issues or areas for improvement, make adjustments to the survey flow, branching, or skip logic as needed.

4. Collect Feedback

- **Internal Testing:** Share the preview link with colleagues or friends to gather feedback. They can help identify any issues or suggest improvements.
- **Feedback Integration:** Incorporate the feedback into your survey design to enhance its quality and effectiveness.

5. Final Checks

- **Grammar and Spelling:** Review the survey for any grammar or spelling errors. A well-written survey improves respondent experience and data quality.
- **Question Clarity:** Ensure all questions are clear and concise. Ambiguous questions can lead to inaccurate responses.
- **Logic Consistency:** Double-check that all logic (branching, skip, display) is consistent and works as intended.

Example

Let's say you have a survey with branching logic based on respondents' answers to a question about website usage.

1. **Preview Survey:** Click "Preview" to open the survey in a new window.
2. **Simulate Responses:** Answer "Yes" to the website usage question and verify that the website feedback block is displayed. Answer "No" and ensure the block is skipped.
3. **Mobile Preview:** Check how the survey looks on a smartphone to ensure it is mobile-friendly.
4. **Test Logic:** Go through the survey multiple times, selecting different answers to test all branching and skip logic.
5. **Review Survey Flow:** Click "Survey Flow" to review the structure and make any necessary adjustments.
6. **Collect Feedback:** Share the preview link with colleagues and incorporate their feedback.

Step 7: Distribute Your Survey

1. Distribute Survey

- **Navigate to Distribution**: In the survey editor, click on the 'Distributions' tab at the top of the page. This will take you to the distribution options for your survey.
- **Distribution Methods**: Qualtrics offers several methods to distribute your survey, including email, anonymous link, social media, and more. Choose the method that best suits your needs.

2. Choose Distribution Method

Email Distribution:

Create Contact List: If you plan to distribute your survey via email, you need a contact list. Go to the 'Contacts' tab and create a new contact list by importing email addresses.

Compose Email: In the 'Distributions' tab, select 'Email' and compose your email invitation. Include a clear subject line and a brief message explaining the purpose of the survey.

Schedule Distribution: You can send the email immediately or schedule it for a later date and time.

Anonymous Link:

Generate Link: Select 'Anonymous Link' from the distribution options. Qualtrics will generate a unique URL for your survey.

Share Link: Copy the link and share it via your preferred channels, such as social media, website, or direct messaging.

Social Media:

Share Directly: Qualtrics allows you to share your survey directly on social media platforms like Facebook, Twitter, and LinkedIn. Select the platform and follow the prompts to post your survey link.

QR Code:

Generate QR Code: You can also generate a QR code for your survey. Select 'QR Code' from the distribution options, and Qualtrics will create a scannable code.

Share QR Code: Download the QR code image and include it in printed materials, presentations, or digital media.

3. Send Survey

****Review Settings**:** Before sending your survey, review the distribution settings. Ensure that the survey link is active and that any necessary settings (e.g., survey expiration date, response limits) are configured.

****Send or Publish**:** Click 'Send' for email distributions or 'Publish' for other methods to make your survey live.

Example

Let's say you want to distribute your survey via email and an anonymous link.

1. **Email Distribution:**

- ****Create Contact List**:** Go to the 'Contacts' tab and create a new contact list with the email addresses of the students' parents.
- ****Compose Email**:** In the 'Distributions' tab, select 'Email' and compose your email invitation. Include a subject line like 'We Value Your Feedback!' and a message explaining the survey's purpose.
- ****Schedule Distribution**:** Choose to send the email immediately or schedule it for a specific date and time.

2. **Anonymous Link:**

- ****Generate Link**:** Select 'Anonymous Link' from the distribution options. Copy the generated URL.
- ****Share Link**:** Share the link on your school's website, social media, or through direct messaging.

Scoring and downloading data from Qualtrics to analyse

Step 1: Enable Scoring

1. Go to Survey Options

- **Access Survey Options:** In the survey editor, click on the "Survey Options" button at the top of the page. This will open a menu with various settings for your survey.

2. Enable Scoring

- **Find Scoring Section:** In the survey options menu, locate the "Scoring" section.
- **Toggle Scoring On:** Toggle the scoring option to "On". This will enable scoring for your survey, allowing you to assign points to different answer choices.

Step 2: Set Up Scoring for Questions

1. Select a Question

- **Choose the Question:** Click on the question you want to assign a score to. For example, let's say you have a Likert-type scale question asking students to rate their agreement with the statement "I enjoy learning maths."

2. Question Options

- **Open Question Options:** Click on the question options (usually represented by three dots or a gear icon) to open the menu.
- **Select Scoring:** From the menu, select "Scoring". This will open the scoring settings for the question.

3. Assign Scores

- **Enter Scores:** In the scoring settings, you can assign scores to each answer choice. For a 1-5 Likert-type scale, you might have the following options:
 - **Strongly Disagree:** 1 point
 - **Disagree:** 2 points
 - **Neutral:** 3 points
 - **Agree:** 4 points
 - **Strongly Agree:** 5 points

Step 3: Review and Adjust Scoring

1. Review Scores

- **Check Assigned Scores:** Go through each question and review the assigned scores to ensure they are correct. Make sure the scoring aligns with the intended evaluation.

2. Adjust Scores

- **Update Scores if Needed:** If you need to make changes, click on the scoring option for each question and update the values. For example, if you realize that "Neutral" should be worth 2 points instead of 3, adjust the score accordingly.

Example

Let's say you have a survey with several Likert-type scale questions to assess students' attitudes towards different subjects.

1. **Enable Scoring:** Go to survey options and enable scoring.
2. **Set Up Scoring:** For each Likert-type scale question, assign scores to the answer choices. For example:
 - **Question:** "I enjoy learning maths."
 - **Strongly Disagree:** 1 point
 - **Disagree:** 2 points
 - **Neutral:** 3 points
 - **Agree:** 4 points
 - **Strongly Agree:** 5 points
 - **Question:** "I find science interesting."
 - **Strongly Disagree:** 1 point
 - **Disagree:** 2 points
 - **Neutral:** 3 points
 - **Agree:** 4 points
 - **Strongly Agree:** 5 points
3. **Review and Adjust:** Ensure all scores are correctly assigned and make adjustments if necessary.

By following these expanded steps, you can effectively set up scoring for Likert-type scale questions in your Qualtrics survey, allowing you to evaluate students' attitudes and responses quantitatively. This also allows you to incorporate reverse-scoring into your survey or measures on different scales.

Step 4: Exporting Data

1. **Go to Data & Analysis:** Click on the "Data & Analysis" tab at the top of the page. This will take you to the data view for your survey.
2. **Export & Import:** In the "Data & Analysis" tab, click on the "Export & Import" button.
3. **Export Data:** Select "Export Data" from the dropdown menu.
4. **Choose Format:** In the export options, choose "SPSS" as the format. This will ensure the data is exported in a format compatible with SPSS.

Step 5: Customise Export Settings

1. **Use Numeric Values:** Ensure that the option to use numeric values is selected. This will export the data with numeric codes for responses, which is useful for analysis in SPSS.
2. **Select Data to Export:** Choose the specific data you want to export. You can select all responses or filter based on specific criteria.
3. **Download Data:** Click on the "Download" button to export the data. Save the file to a location on your computer where you can easily find it.

Step 6: Open Data in SPSS

1. **Open SPSS:** Launch SPSS on your computer.
2. **Import Data:** In SPSS, go to "File" > "Open" > "Data".
3. **Select File:** Navigate to the location where you saved the exported data file from Qualtrics. Select the file and click "Open".
4. **Variable View:** Once the data is loaded, switch to the "Variable View" in SPSS to review the imported variables and their properties.

Step 7: Clean and Prepare Data

1. **Review Variables:** Check the imported variables to ensure they are correctly labelled and formatted.
2. **Remove Unnecessary Columns:** Qualtrics may add extra columns (e.g., start date, end date, IP address). Remove any columns that are not needed for your analysis.
3. **Check for Missing Data:** Identify and handle any missing data. You can choose to exclude incomplete responses or impute missing values.
4. **Recode Variables:** If necessary, recode variables to match the scale of your analysis. For example, you might want to recode a Likert scale from 1-5 to 0-4.

Example

Let's say you conducted a survey to assess students' satisfaction with their school environment.

1. **Access Your Survey Data:** Log in to Qualtrics, select your survey, and go to the "Data & Analysis" tab.
2. **Export Data:** Click "Export & Import", select "Export Data", choose "SPSS" as the format, and ensure numeric values are used. Download the file.
3. **Open Data in SPSS:** Open SPSS, go to "File" > "Open" > "Data", and select the downloaded file.
4. **Clean and Prepare Data:** Review the variables, remove unnecessary columns, check for missing data, and recode variables if needed.

By following these steps, you can successfully download and prepare your Qualtrics survey data for analysis in SPSS.