Using Qualtrics for Assessment

Qualtrics is a powerful online survey program that has some advantages over Select Survey for department and institution research. As such, it should only be used for academic research, institutional research and department assessment, areas that generally require that the data be manipulated statistically once it is collected. Select Survey is still a great program for general surveys of preferences, feedback on small programs and online registration.

In order to log on to Qualtrics, use the following address: wooster.co1.qualtrics.com

To create a survey:
1. Click on the "Create Survey" tab. Choose "Quick Survey Builder."
2. Name your survey. If you wish to organize your surveys, you can also create folders to place them in.
3. To begin your survey, click the green button "Create a New Item"
   a. The default question type is multiple choice, single answer.
   b. On the right is a green button that allows you to choose the question type. Click this to change. By hovering your mouse over each question type, you can see an example of what it will look like. You can also click the triangle once your choice is highlighted in blue to choose a different format of the same question type.
   c. The right hand side of the screen will have all your choices to customize your questions. This appears once you click on a question and it is highlighted in light gray.
   d. Any time you note an upside down triangle icon, click here for options.
   e. To change the text of any question or answer, just click on the placeholder text. To modify the text, choose the "Rich Content Editor" tab for questions or by clicking the triangle next to the answer choice for answers. This allows you to edit your text just as in Word (e.g. bold, italics, colors)
4. There are four basic types of questions that most surveys will include:
   a. Multiple choice, single selection
      i. This is the default type – there are circle buttons for the respondent to choose only one from
      ii. Ideal question type for Likert scales (e.g. agree – disagree)
      iii. You can type in the different answer choices. Hitting enter after each choice will take you to the next choice to edit or add more choices at the bottom of the list of answers. Additional choices can also be added from the right hand side options under "Choices" and either typing in the number you want or clicking the + and –.
      iv. In the right hand side options, you can also choose to have the program auto-fill the choices for many different Likert scales. Click the box that is next to "Automatic Choices" (under the number of answer choices). These are editable if you don't like each auto-fill choice. Also, you can add or subtract the number of auto-fill options.
      v. If you have several questions, all with the same direction and answer choices, you may want to consider a "Matrix Table." It compiles several multiple choice questions into one table, but the data is still able to be analyzed by each part of the question.

b. Multiple choice, multiple selection
   i. This can be chosen by clicking the circle under "Answers", labeled "Multiple Answer"
   ii. There are square buttons for the respondent to choose many
   iii. Often, with these types of questions, people want to offer an "Other" choice with a fill in box. To do so, click on your answer that you are giving for "other" and then click on the triangle to bring up the answer's options. Click on "Allow Text Entry" (top of the list) – a fill-in box will appear.
c. Open-ended text entry
   i. Click on the green box for the Item Types on the right hand side. Choose "Text Entry".
   ii. Once given this type of question, different options appear on the right hand side that can change the size of the box, make a form with several boxes, and specify the minimum or maximum number of characters (the default is no min or max).
d. Text Header
   i. Simple headers to question sections are labeled as questions in Qualtrics.
   ii. Add an item and click on the green box for Item Types on the right hand side. Choose "Descriptive Text."

5. Other features:
   a. The survey automatically saves as you go and make changes.
   b. To add questions, you can click on the green + (on the right of each question) either above or below a current question, respectively. Clicking on the red – will move the question to the trash (at the bottom of your survey). You can recover any trashed questions by clicking on them in the trash and choosing "Restore."
   c. To move questions, you can use the grey arrows on the left of each question to move one spot at a time. If you want to move it farther, click on the question, choose "Move Question" on the right side options box. The question will highlight in blue. Move your cursor to where you want to put the question and click.
   d. You can group questions that are similar in blocks. To create a new block, click "Add Block" (very small print) at the end of the questions.
   e. You can spell check the survey – it is under the "Tools" tab at the top of the page.
   f. You can preview the survey from "Preview Survey" blue button at the top of the page.
   g. You can add page breaks for better control over how your survey will appear to your respondents. Click the question you want the page break to appear after, then click "Add Page Break" on the right side options.
   h. You can export your survey to Word for easier sharing. Click on "tools" and choose "Export Survey to Word" at the bottom of the list.
   i. In order to send your survey out, you will first need to activate it. Go to "Distributions." This will provide you with options to send your survey. "Anonymous link" will give you a generic web page link that you can send out. You also have the option of managing emails and reminders through Qualtrics. You will need to create a contact list (i.e. mailing list) in a particular csv file format.
   j. The "Help" function (at the very right top of the page) is great! It will open in another tab so you can go back and forth between your survey and figuring out how to do things.
   k. Results can be manipulated into tables and figures directly in Qualtrics or exported directly to Excel or SPSS.
   l. You can share your survey for editing or other functions through the "share project" option under the "Actions" upside down carrot (right hand side) on the main "My Surveys" tab. Feel free to share with Missy for any help!