Workshop on Qualtrics
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Lesson 1: Accessing Qualtrics

Purpose

The purpose of this lesson is to learn how to access Qualtrics and how to create a Qualtrics account.

1. Using a web browser of your choice (Chrome, Firefox, etc.) go to Qualtrics | UNLV Information Technology.
2. Select Login / Register. This will direct you to the UNLV Qualtrics login page.
3. To log in, you must create an account.
4. To create an account, simply select "Don't have an account?"
5. Once you have created your account, Qualtrics will send a verification email with a registration link.
6. Click the link that Qualtrics sends you and your account will be created.

Lesson 2: Watch the Introductory Videos

Purpose

The purpose of this lesson is to view the training videos and be taught how to use the latest version of the Qualtrics interface.

Prerequisite

Must have completed Lesson 1.

1. After creating your account for Qualtrics, go to the following link: Introduction to Making a Qualtrics Survey 2021 Update!
2. This link will take you to a YouTube video that can walk you through the step-by-step process of building a survey in Qualtrics.
3. For your training, watch the video. This video runs for 51 minutes.

Lesson 3: Implement Skills Learned from the Videos

Purpose

The purpose of this lesson is to apply what you have learned from watching the training videos.

Prerequisite

Must have completed Lessons 1 and 2.

Part 1: Creating a Survey

1. Once you log into Qualtrics, you will be immediately directed to the homepage. Select the “See all projects” button that is on the upper left side of the screen, it will direct you to the Projects page. This page shows you the surveys that are currently being run. If you do not have any running surveys, a link in the center of the page stating “Create Project” will appear.

2. On the Projects tab, click the "Create Project” button to create your first survey.

    a. This will open a page where you will find options for creating your survey.

3. Under “From scratch”, select “Survey.”

    a. This will pop up a tab on the right side of your screen. Select “Get started.” Choose an appropriate name for your project. You may choose any topic you like as long as it pertains to psychology. Under the question “How do you want to start your survey?” select “Create a blank survey project” from the dropdown menu.

    b. Once you have selected the blank survey project as your option, select the “Create project” button.

Part 2: Editing a Survey

1. You should notice you are now in the Survey tab.

2. You should also notice the title you used is above the “Default Question Block”. Blocks are a unique question sorting feature of Qualtrics. There are two ways to put a question into a block:

    a. Copy items from an existing survey.

    b. Create new items.

Part 3: Creating New Items for Your Survey

1. You can create a block for each question, which is also known as an “item”.

2. Under each block, you will see “Add Block”. When you select this text, a block will come up labeled “Block 1”.

3. Select the blue button labeled “Add new question”. In the drop-down menu, select the option called “Text / Graphic”. This will create a new item called Q2.

4. At the top of Q2, it will say “Click to write the question text”. Click on this and you will be promoted to write a question. Change the text to say, “survey image”.

5. On the cluster server, go to X:\Groups\College of Liberal Arts\Psychology\BarchardsLab\Workshops\Qualtrics. There are two pictures. Download one of the pictures to upload to your survey.

    a. To upload the picture to the survey, first, change the question type to graphic. To do this, select Q2, it will then pop up a tab from the left side of your screen. Select the box under the text, "Content type"; then select "Graphic" from the drop-down menu.

    b. Then, in Q2, click on the blue highlighted font that says "Select a graphic to use for this question" on the block with the graphic item type, and then proceed to upload the image you have stored on your computer's files by clicking the green "Upload a New Graphic" button.

    c. At the very bottom of your survey, make sure there is an item that references the image. To do this, you could create a new block under block 1, and create an item in the new block with the question type "Text / Graphic". This item that references the image must have the following: "Free image courtesy of FreeDigitalPhotos.net." Select the block name "Block 2", change the text to "copyright".

    Note: If you want to add more questions, continue to click on the blue "Add new question" button.

1. Create 10 blocks beneath the picture block. For each block, create a Multiple-choice question within it. Use the following questions for question text, one per block

    a. He doesn't talk a lot.

    b. He is the life of the party.

    c. He starts conversations.

    d. He finds it difficult to approach others.

    e. He waits for others to lead the way.

    f. He doesn't mind being the center of attention.

    g. He likes to take charge.

    h. He knows how to captivate people.

    i. He bottles up his feelings.

    j. He keeps in the background.

2. After writing the question text, you have to include answers. So, on the blocks you will find a vertical row of multiple answers, each called a choice. Make sure you have 5 answer choices for each question. If you wanted to add or remove choices from your question blocks, there is a section on the left panel of the screen where it says Choices. Below Choices, click either on the plus or minus signs to add or remove answers for a question.

3. In the question box, select where it says, “Click to write Choice 1”, and then proceed to type in the answers for each choice. For choice 1, write Strongly Disagree, for choice 2, type in Disagree, for choice 3, type in Neutral, for choice 4, type in Agree, and for choice 5, type in Strongly Agree.

Part 4: Random Assignment to Groups

1. Click on the Survey tab and choose the second icon on the left, the “Survey Flow” option.

2. A panel will appear listing your blocks. Click on “Add a New Element Here” below the list of your blocks or click on the first command of each block “Add Below,” written in green font.

3. A yellow box will appear. Choose the mauve purple button named Randomizer.

4. To randomize the blocks, select the move option on one of the blocks and drag the block below the Randomizer to where it says “Add a New Element Here” or click on the block and use your up and down arrow keys.

5. The next step is to move the ten blocks with the multiple-choice questions under the Randomizer. Make sure to keep the “default question block” and “copyright” out of the randomizer.

Part 5: Branching

1. Branching allows you to connect one block to another. It can also be used to end a survey at any given point and can be used as a consent form if your study has one.

2. Go to the builder page, select the “default question block”. Change the block name to “Consent Form”.

3. Make sure the item type is Multiple Choice by changing it from the Edit question panel on the left and that there are only two answer choices, yes and no.

    a. Be sure to open the Sample Consent Form page on the cluster server, in the location X:\Groups\College of Liberal Arts\Psychology\BarchardsLab\Workshops\Qualtrics.

    b. Then, copy and paste the contents as the question text.

4. Click the Survey Flow button.
5. Click the Move button and drag the Consent Form block to the beginning of the survey. This way, it will be the first thing that appears when someone takes the survey.
6. Then, click the Add Below button in the "Consent Form" block.
7. Click the "Branch" button.
8. Next, it's time to add the condition to the branch.
    a. Select the blue text "Add a Condition".
    b. Then, select the question you'd like to use. For this example, use the informed consent question.
    c. After that, select No when it prompts you to select a choice. This will allow the branch to take effect if someone chooses not to participate in the survey.
9. It is now time to create the No Thanks page. Select the green OK button first and select the blue "Apply" button at the lower right corner to save changes. Go back to the builder page.
10. Begin by creating a block.
    a. This block will be known as the "No Thanks" page.
    b. Once the block has been created, make sure to create a question with the question type Text/Graphic.
    c. Then, write: "Thank you for taking our survey. Press the next button to end the survey."
11. Click the Survey Flow button.
12. Click the Move button in the "No Thanks" block and drag the block to the branch you created for the consent page.
    a. Now that this block is in place when someone clicks no to your consent form, they will be directed to this page.
13. Then, click the Add Below button in the "No Thanks" block.
14. Then, the "End of Survey" button. Make sure to select the Apply button on the bottom right to save your changes.
    a. Now, once they are on the No Thanks page, they can click the next button to end the survey.

Part 6: Debriefing Page

1. Create a block at the end of the survey. This will be known as the debriefing page.
    a. This page serves to inform students of what the study was studying.
2. Make sure to include the purpose of the study, contact information, and thank the student for participating. A sample has been provided below:

Debriefing Page
The purpose of our study was to see if the pictures of couples or single individuals had an effect on measures of extroversion. Be sure to click the next button to finish the survey.
If you have any questions, please feel free to contact Dr. Kim Barchard at kim.barchard@unlv.edu or 702-895-0758
Thank you for participating in the study!

Lesson 4: Watching Tutorial Videos

Purpose

The purpose of this lesson is to be informed of all the features Qualtrics has to offer and to teach any beginner how to create and edit surveys.

Part 1: Watch the videos located on the Qualtrics training website listed below:

- XM Basecamp

Lesson 5: Additional Skills

Purpose

The purpose of this lesson is to be informed of the additional features that Qualtrics offers that are vital in creating your survey.

Prerequisites

Must have completed Lessons 1, 2, and 3.

Part 1: Ensuring Participants Return to the Survey with their Answers Saved

1. If a participant decides to leave the survey and shut off their computer, they can return back to a survey they left with their original answers saved. To do this, you must use the "Authenticator," which is a tool that creates a log-in interface for the participants before they take the survey.
2. First is to create a contact list in Qualtrics.
    a. At the upper left corner, select the three lines next to the XM icon to open the menu bar. Go to the Contacts page.

    b. On your screen, there is a green button called "Create Contact List", select it. Choose a name and a folder for your contact list, once you finish, select "next".
    c. A window will pop up called "Add Contacts", select the "Add Manually" tab. Put in the names and emails for your Qualtrics trainers and yourself in the appropriate cells. When you finish, select the "Add Contacts" button.
3. Then, go back to your project. Click on the Survey tab, then click on the Survey Flow icon.
4. Click on the green highlighted font at the end of the page that says "Add a New Element Here."
5. Once you click on "Add a New Element Here," a yellow box will come up. Click on the Authenticator button. A blue box will appear.
6. On this blue box, change the authentication type to "Contact". And under where it says, "Authenticate Using Contact," click on the arrow of the scroll-down list and choose My Library. After doing so, a second scroll-down menu will appear beside the one you just clicked saying "Select Contact…." Click on "Select Contact" and choose the contact(s) in which you have listed your participants in.
7. After selecting your contacts, below "Authenticate Using Contact" will appear a row called "Authentication Fields."
8. In Authentication Fields, you can choose how you want your participants to log in when they try to access the survey. For now, click on the Contacts Field scroll down list, and choose "email." You can also specify how the participant should log in by stating "Provide your email" in the textbox beside the Contacts Field that says, "Optional Label…". The participants' email will be what participants will log-in with.
9. After completing the Authentication, move the blue Authentication box at the top of your Survey Flow, above your questions if you decide to create your Authentication after you have completed your survey.
10. Click Apply to save your settings.
11. When you send out the link to your survey to the participants through email, the participant will click on the link and be faced with a log-in interface.
12. The participant will only have to log in once. If they leave the survey and shut off their computer but return to the email with the survey link, they clicked on and click on it again, they will be taken right back to their survey with their answers saved.

Part 2: Submit Survey to Lab Manager and Person Teaching Workshop

1. For distributing your survey to the person who has taught you how to use Qualtrics, simply send them both the link to your survey by email.
2. Click on the Distributions tab, you are given options on how to send your survey, either through Qualtrics or by generating a link. For this workshop select “Compose Email”. This will automatically activate your survey.
3. On where it says “To:,” a box with “Select Contacts” will be at the top of your email message. Click on “Select Contacts” and either enter in the email addresses of your Lab Manager and the person who taught you the workshop or select a panel where you have their email addresses stored in your library.
4. Where it says “When:,” with the gray box beside it, click on the gray box and choose “Send Now.”
5. For the “Subject” text box, type in your name followed by “survey.”
6. After completing these steps, click “Send Now.”

Part 3: Adding a Header

1. On some surveys, you may want to add a sidebar that appears on every page and does not change its position. To add a sidebar to your survey, first, click on the “Look and Feel” tab.
2. On the “Look and Feel” pop-up box, click on the “General” tab.
3. There is a text box labeled “Header.” In this textbox, enter in text that you want to show up on your sidebar.
4. After you are satisfied with the information in your “Header,” click Apply.
5. When you run your survey, you will now see the header on every page you go to.

Part 4: Changing the Appearance

1. On some surveys, you may want to change the appearance of the survey (i.e., change the width, or look of the survey).
2. On the very left side of your screen, there is a list of icons. Select the third one that looks like a paint roller. It will then direct you to the page called Look and Feel.

A large box will appear with seven different tabs:

   a. Theme
   b. Layout

c. General
d. Style
e. Motion
f. Logo
g. Background

3. Now you can explore these tabs to customize your survey. But some functions may not be applicable with some of the UNLV themes. For example, you cannot open the Layout tab with the default theme. To change the theme, select the theme tab and choose the one that you desire.
4. On the “Layout” tab on the left-hand side of the page, there are three sample displays, small pictures of different layouts. To change the layout, simply click on one of the boxes and it will automatically change the layout.
5. The “General”, “Style”, “Motion”, “Logo” and “Background” tabs offer a variety of options to personalize your survey such as background images, transitions, and different fonts, to name a few. Play around with these options to make your survey look unique.
6. Next, select the Apply button located on the bottom right-hand corner.
7. When you run the survey, you will now see the new appearance.

Part 5: Question Timer

A timer can be used to define a question block with time. You can either restrict the submission of a question by delaying submission until a time period concludes or limiting the time to answer the question. If you limit the time to answer a question the participant may either submit the answer before the time period is over, answer the question and the answer will be automatically submitted, or if they fail to answer the question, no answer will be submitted. You may choose for the participant to see a timer on the page as well. The timer will be shown as a question on the block. When the survey is completed, you will be given data regarding when the participant first clicked, last clicked, submitted, and total number of clicks.

Using Timing

1. Select the “Add a new question” button on the desired block
2. Choose “Timing” (in the question box it will show “This question lets you record and manage how long a participant spends on this page. This question will not be displayed to the participant.”)

3. You will see options on the sidebar where there are switches to turn on “Delay showing submit button”, “Auto advance”, and “Show Timer” to the participant. Choose the desired option.
    a. Delay showing submit button
        i. Fill in desired number of seconds
        ii. Does not allow submission until time is completed
    b. Auto advance
        i. Fill in desired number of seconds
        ii. Automatically submits after the time is completed
        iii. Even if the question or questions on the block are not answered it will still submit
        iv. Allows submission before time is completed
    c. Show Timer
        i. Fill in desired number of seconds
        ii. Option to count up or count down
        iii. Typically count down the same number of seconds as until auto submit

Part 6: Changing Fonts

You are able to change the font of the entire survey. Saving the time required to change each question and answer.

a. Click “Style” on the left-hand side of the “Look and Feel” tab

b. Click “Font”

c. Choose the lab’s standard Arial 12 pt. for both question text and answer text.

d. Select “Apply” on the bottom right of the window

Note: Not applicable to default “static” themes

Resources:

Purpose

Tools on the Qualtrics website you may find helpful when creating a survey:

- Free training courses located on the Qualtrics Website

Edit the HTML Code

1. Text entry questions are the only item types where you can edit the HTML code.
2. To edit the HTML code in a text entry, insert the text for your question.
3. Click the HTML View tab on the right-hand corner of the text entry box. The edit HTML tab will allow you to edit the code and change the look of your survey question.

Randomizing Questions

If you have multiple items in one block and want to randomize them, follow these instructions:

1. In the Survey tab, click on the block with the questions you want to randomize. A column on the left will appear called “Edit block”. Under “Block behavior” select Question Randomization.
2. Once you select Question Randomization, a pop-up box will appear with a series of options for randomizing your questions. Click on the blue link that says Set Up Advanced Randomization.
3. The Advanced Randomization panel will appear. Two columns are showing, the left column is titled Fixed Display Order, and indicates the order your questions are currently in, while the right column has a box titled Randomize Questions.
4. Select the question from the Fixed Display Order you want to randomize, and then click on the right arrow button that is pointing towards the Randomize Questions box. Doing so moves the question from the Fixed Display Order to Randomize Questions, therefore each question you move to Randomize Questions is randomized in an order different from the order you had in the Fixed Display Order.