

## Creating a Qualtrics Survey

These exercises assume that you have already created an account at **Qualtrics**. If not, please consult our separate documentation on how to create one. These exercises are divided into two parts: **Basic Survey Construction** and **Advanced Survey Construction**. The latter assumes you are using the same survey that you created in the basic part.

**STOP!** Before you even THINK of sending out a survey on Dominican's behalf, be absolutely, positively, CERTAIN you have read the University's survey policy available at: <https://duconnect.dom.edu/teams/oir>

### Basic Survey Construction

Login to Qualtrics at <http://dom.qualtrics.com> with your email address and your previously-chosen password when you established the account. You will be on the **My Projects** page. (In *Qualtrics*-ese, "project" and "survey" are roughly synonymous.)

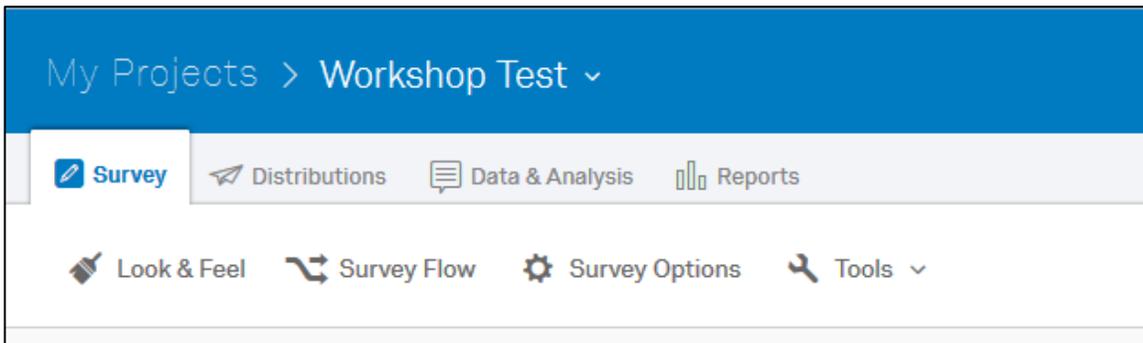
1. Click the **Create Project** button on the top right of the screen:



2. On the ensuing screen provide any name you click and then click **Create Survey**:

You do NOT have to place the survey in a folder, but as you create more of them, you may find it helpful to place specific surveys in folders. That's where the **Folder** drop-down menu comes into play. You can create folders from the main **My Projects** page by clicking the **Folder** button.

3. You will now be on the survey editing screen. The tabs at the top will stay with you throughout your survey editing, and they will be referenced from time to time as we move along:

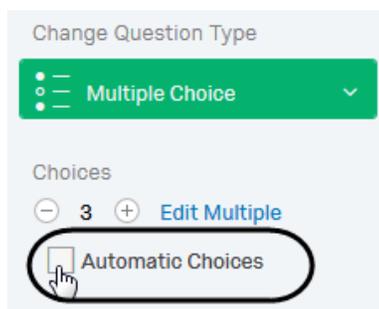


Now that you have at least created a survey, it may not be a bad idea to check the **Survey Options** button, seen under the **Survey** tab, above. Look over the options here, which might frame how you want to present your survey. For example:

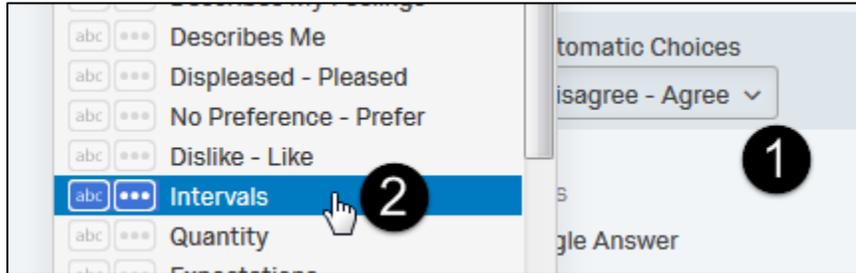
- Note that by default, the **Back Button** is *disabled*. This may not be what you want, since sometimes people DO want to go back on a survey and change an earlier response.
  - There is also a checkbox in the **Survey Protection** area to **Prevent Ballot Box Stuffing** that is disabled. You may want to enable this. No, we're not recommending this only because we're in the Chicago area! This will place a "cookie" on the user's browser that prevents them from taking the survey twice. (However, if they use a different browser, they will still be able to take it a second time!)
  - In the **Survey Termination** area towards the bottom, note that you can also create a **Custom End of Survey Message**.
  - Play around with these options and see their effects as you preview your survey later.
4. In your initial survey, you already have a question placeholder on the screen. (If you do not, you can start by clicking the **Create a New Question** button.) By default, it will be a multiple-choice type of question. You will soon see how to change the *type* of question displayed, but for now let's use the sample given to us.
- Click directly over where you see **Click to write the question text** and type the following:

**How often do you attend DU sporting events?**

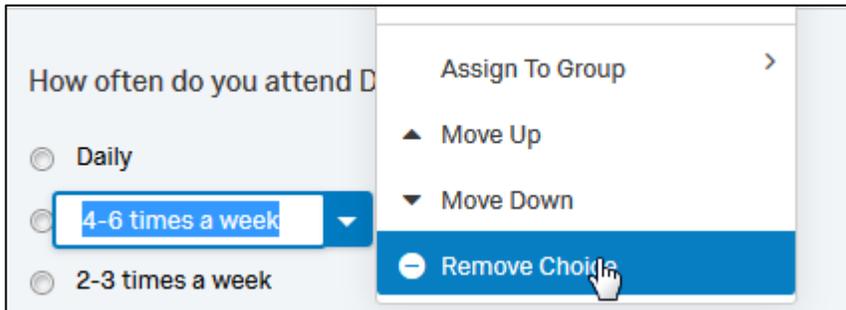
- Next, click over on the far right of the screen and enable the checkbox under the green **Multiple Choice** icon and select **Automatic Choices**:



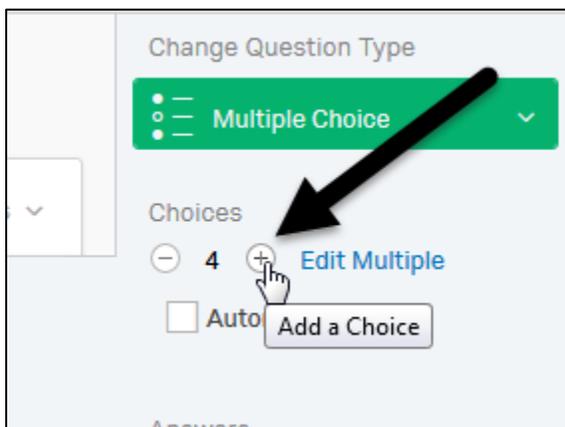
- c. As a result, *Qualtrics* will automatically give several choices. This is great boon for those of you who hate typing. If *Qualtrics* ever misinterprets your intention with these types of questions, you can obviously type over their answer choices, but you can *also* get more choices by clicking the drop-down menu immediately under the Automatic Choices checkbox that you just enabled. Go ahead and click it to get a rather large listing of *other* answer choices. In this case, select **Intervals**:



- d. In addition to typing over some of the choices, you can also edit/remove any of the choices generated by clicking directly in one of the options and the resulting drop-down arrow:



- e. Go ahead and remove the choice for **4-6 times a week**.  
 f. So, how do you ADD a choice, such as **Monthly**? Usually the easiest method is by clicking the + button that is shown below. It is on the far right of the screen:

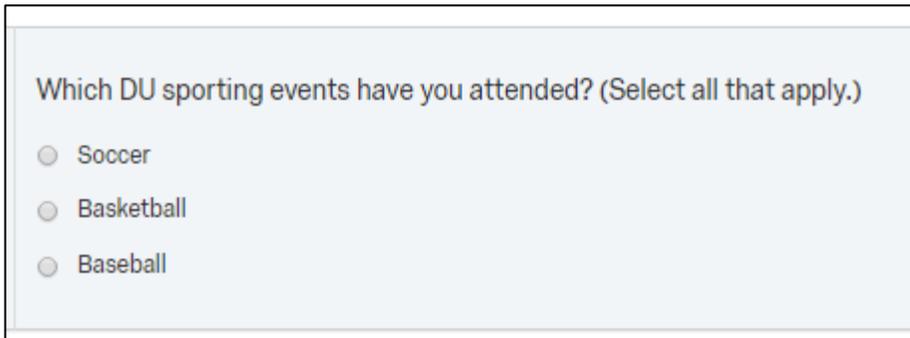


Ironically, however, because we earlier enabled **Automatic choices**, that will simply add **4-6 times a week** yet again...only this time UNDER **Never**! We don't want that. Since our new option of **Monthly** should appear *above Never*, you will want to click on the **Edit Multiple** link shown to the right of the + on the above screen capture. That will open an editor allowing us to type in our new choice of **Monthly** where we want:

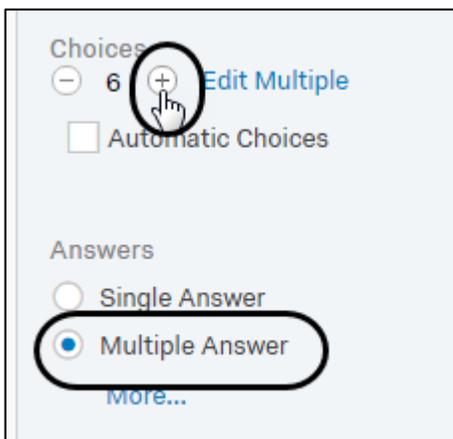


g. Just click anywhere outside the question stop editing it.

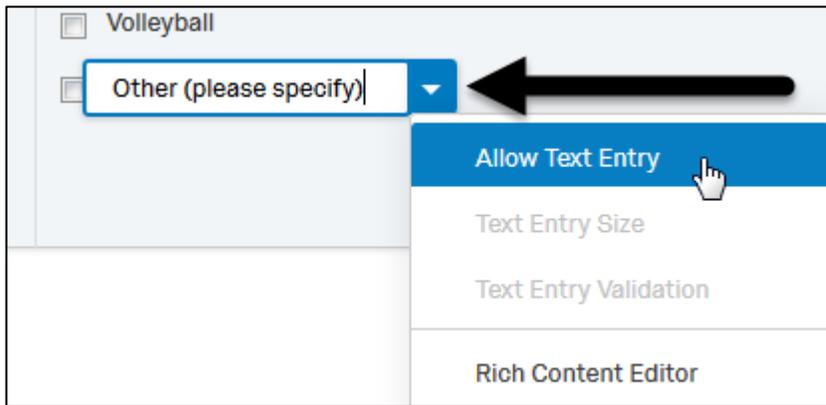
- Next, we'll add another question. Click the drop-down menu next to **Create a New Question** at the bottom of the screen and select **Multiple Choice**. Click over the **Click to write the question text** question and type the following question and answer choices:



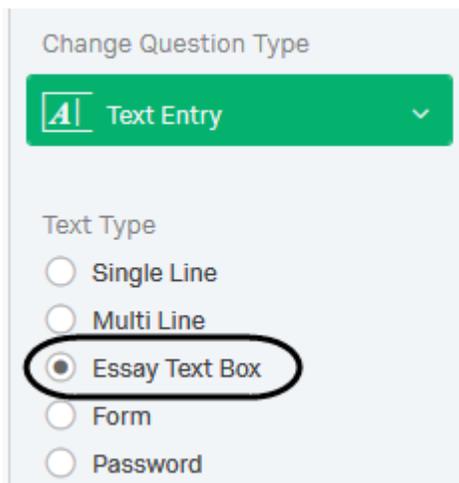
Not only are you running out of choices, but you want people to answer more than one choice! Both options are available over on the far right. Change them to **6** choices and **Multiple answer**:



- Continue filling in the following: **Softball, Volleyball, and Other (please specify)**. (*TIP: you can press the TAB key on your keyboard to quickly move through them.*) For the last option, click the drop-down menu next to **Other (please specify)** and enable **Allow Text Entry**:



7. Next, we will ask an open-ended question asking respondents for their comments on the experience of watching a **soccer** match, specifically. So, create a new question, and make it **text entry**.
  - a. Note there are options on the right, which will change based on the type of question selected. Make this one **Essay Text Box** for longer answers. (Note that this area is *also* where you can change the question type altogether if you have a change of heart.)



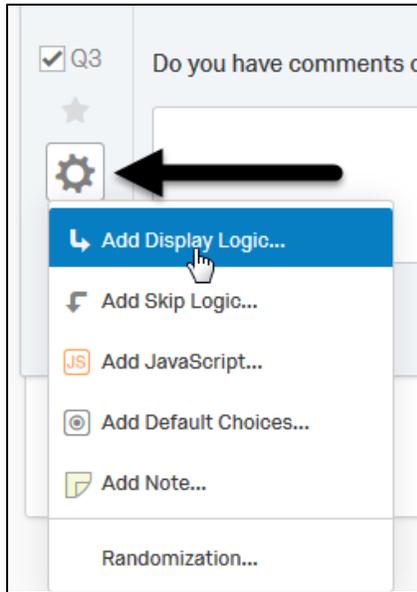
- b. For the question, type in the following:

**Do you have any comments or suggestions for how fans experience a soccer game?**

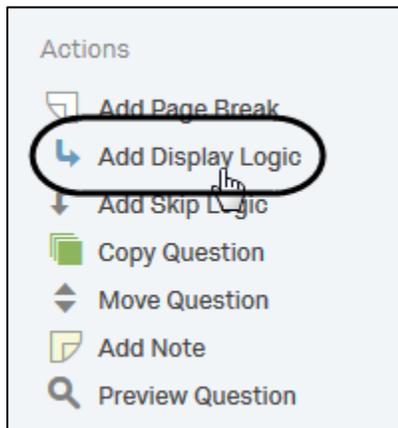
### Display Logic

8. The above question should only appear to those who selected **Soccer** as a choice on the previous question. We will add what is called **Display Logic** to this question.

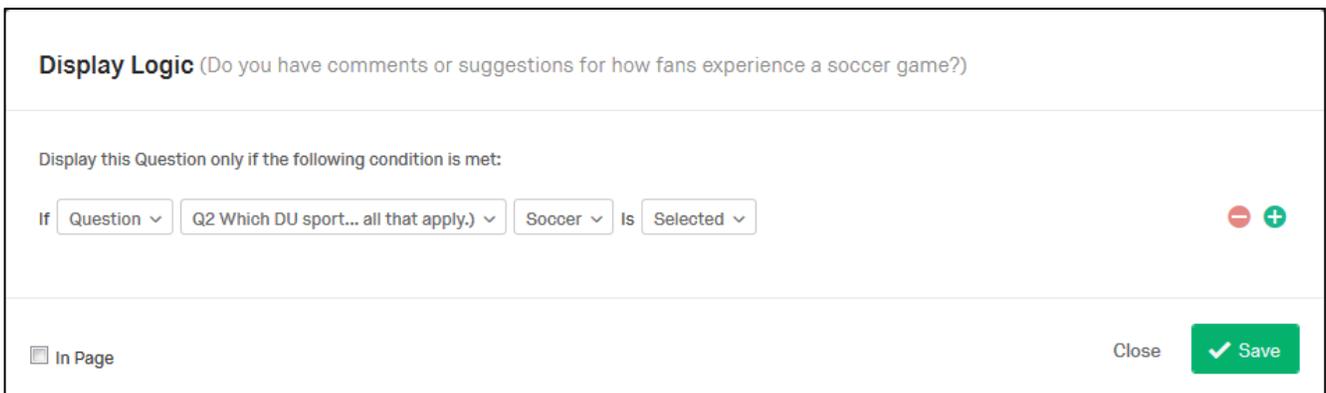
- a. There are *two* places you can add special options to questions in Qualtrics. One is using the "gear" icon on the far left, just below the question number:



- b. The other is at the far right, under **Actions**:



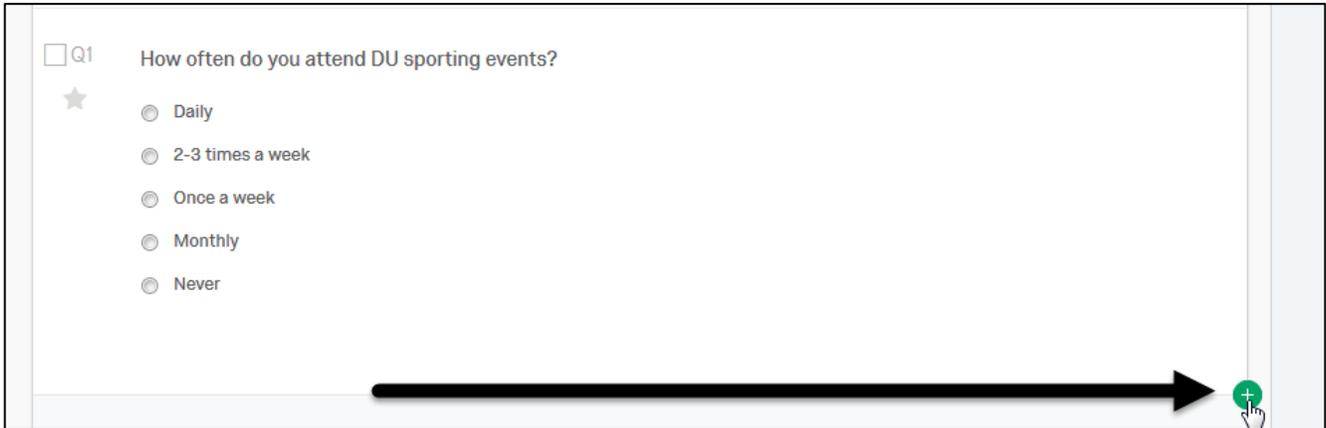
- c. Set the display logic so that this question only appears to those who answered **Soccer** to the previous question. The dialog box—which is fairly self-explanatory—should look something like this when you are finished:



Be sure to click the **Save** button to save it!

## Skip Logic and Inserting a Question in the Middle

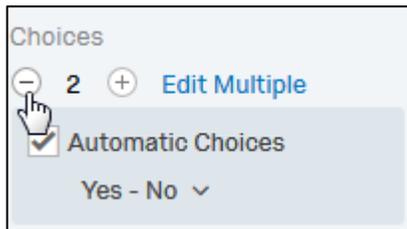
- We realize we should probably ask participants if they are student athletes back near the beginning of the survey. So, to add a question immediately UNDER the first question (on how often they attend sporting events), hover your mouse over the first question and click the green + sign at the bottom, as shown below:



Now type the following question:

### Are you currently a DU student athlete?

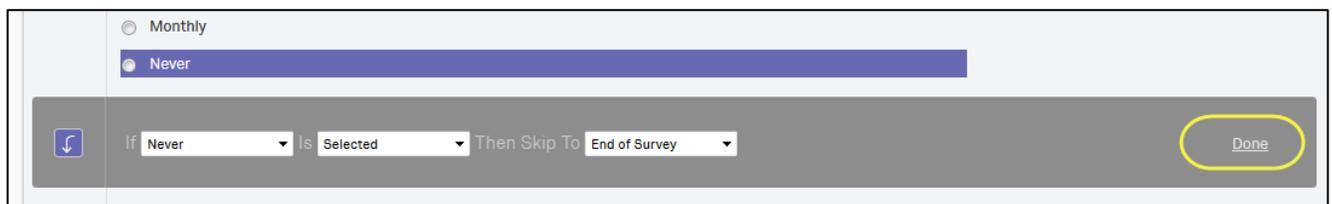
Click away from the question, and Qualtrics' "Automatic Choices" will kick in again, giving several choices relating to **Yes** and **No** choices. Click the – button to bring it down to but 2 choices, **Yes** or **No**, but make sure you have the correct question selected by clicking the checkbox to the left of the question number:



**Sanity-saving tip:** It is easy to change the choices on the wrong question! Just click somewhere in the vicinity of the question you are editing OR click the checkbox next to the question number:



- Next, add **Skip Logic** (not Display Logic this time!) to your **first** question regarding how often they attend sporting events. (To ensure you are adding **Skip Logic** to the correct question, just click anywhere in the white space inside of it.) In this case, *if* they answer **Never**, they are *skipped* to the end of the survey. Your dialog box should look like this:



Be sure to click **Done**. (Circled in the above screen capture.)

### A Logical Explanation of Logic in Qualtrics

**Display Logic** determines whether or not the specific question you are editing is even **displayed**, to begin with.

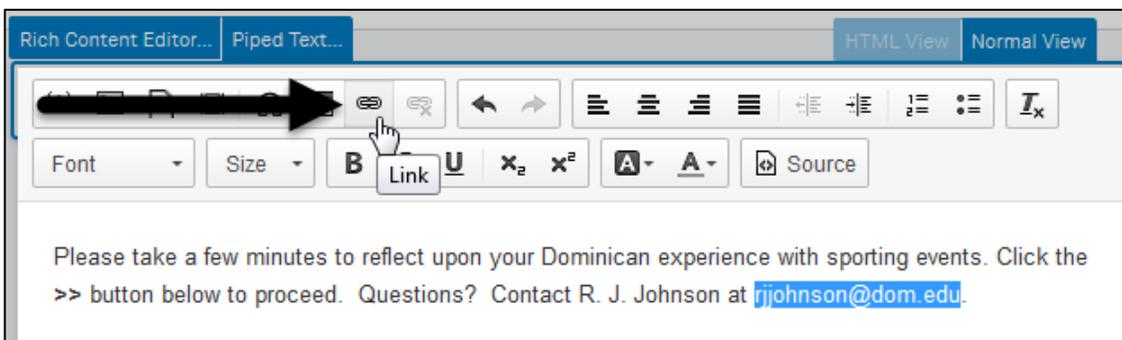
**Skip Logic** will *always* display the question, but will give you the ability to *skip* to another part of the survey based upon the answer to that question.

Sound logical?

10. Now, let's add some explanatory text to the beginning of the survey. Head to your first question and click the green "plus" sign over to the right at the **TOP** to add a question above. Make this "question" the type **Descriptive Text** by picking that option over on the far right, and then type in the following. (Don't panic if your text disappears while typing. We have seen that behavior sometimes. Just click the **Rich Content** editor tab at the top and that behavior should stop.)

**Please take a few minutes to reflect upon your Dominican experience with sporting events. Click the >> icon below to proceed. Questions? Contact [type in your name] at [your email address].**

- a. Click in the text and click the **Rich Content Editor** tab if you haven't already. Highlight the double-arrow symbol and **bold** it. Next, highlight your email address and click on the "Link" icon as shown below:



- b. On the ensuing dialog box, select a **Link Type** of **E-Mail** and type in your email address. You can also add a subject line, if you like:

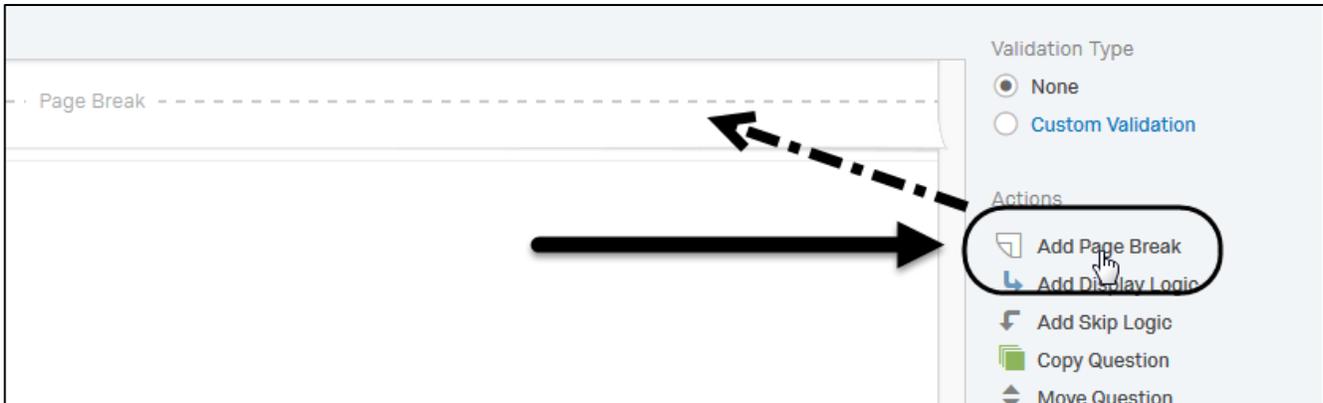
**Clickable email addresses will only work with dedicated, desktop versions of Outlook or similar email program.**

While it's nice to have a clickable email address, as we created here, web-based email clients (such as what our students and adjunct faculty have) will NOT be able to click on the e-mail links and have them work. For that reason, it's good form to spell out your email address as we do here, so that people can also just highlight the address and copy it into whichever web-based email client they have.

### What the @#&\$! is happening to my question numbering?!?

When you add a question out of order in *Qualtrics*, as we just did here, your question numbers on the left side will not appear to be numbered properly. Don't worry. That can be fixed later. (Besides, you shouldn't be swearing. Your doctor warned you against that.)

11. Click anywhere in the question you just added at the top (the background should turn gray), and over on the bottom-right side of the screen click on **Add Page Break**. If done correctly, you will see a page break icon under your text at the beginning:



*Congratulations! You just created the start of a basic survey in Qualtrics! We will continue this survey with some more advanced features, and also introduce another question type or two.*

## Advanced Survey Construction

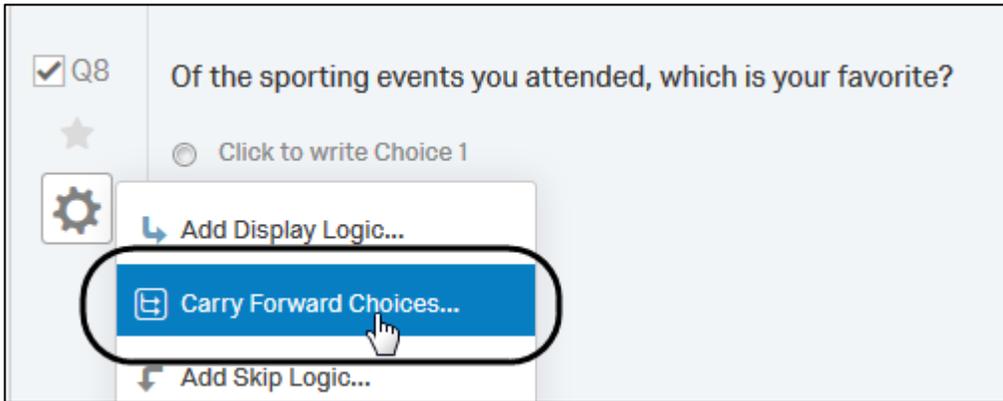
### Carry Forward

12. Add a question *below* the one asking **Which DU sporting events have you attended?** We now wish to find out which event(s) have been the participants' favorites, based on their choices to that question. This will use the **Carry Forward** feature. Follow these instructions carefully:

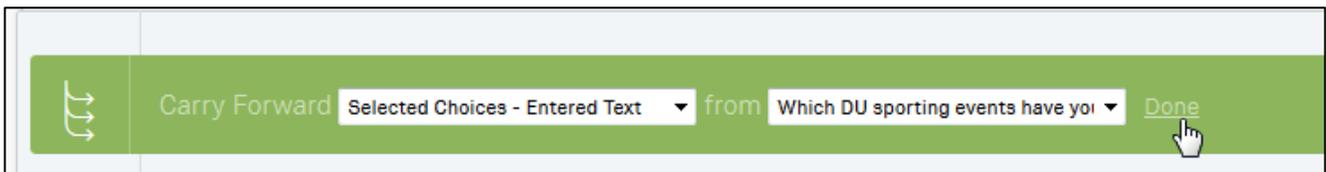
- a. Add a question *below* the **Which DU sporting events....** question, and format it as **multiple choice**. However, do NOT type in any answer choices at all. Type in this question:

**Of the sporting events you attended, which is your favorite?**

- b. Now click the gear icon to left of the question and select **Carry Forward Choices**:



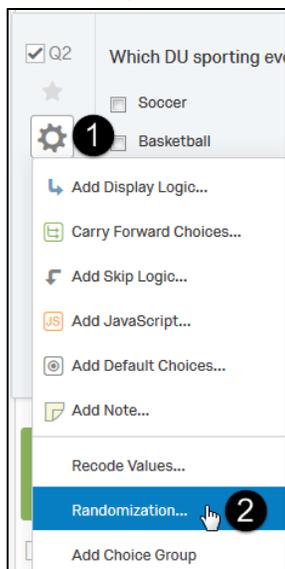
- c. A **Carry Forward** icon appears above the question. By default, the dialog box should select the previous question, and in many cases you do not have to even alter the choices given to you. However, because we allow participants to type in their own option for a sport using the **Other** option, instead of the default of **Selected Choices** in the first drop-down menu, be sure to specify **Selected Choices-Entered text** and then click **Done**:



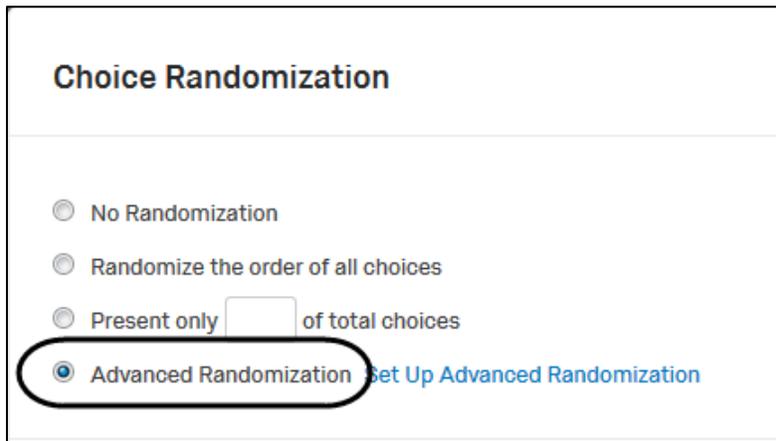
## Randomize Lists

- 13. On that previous multiple answer question on sporting events (*not* the one with the “Carry Forward” option—the first one, asking about the events attended), we had **Soccer** at the top of that list, which might lead some people to select that more often. While that will delight you if you are a soccer fan, it’s *really* best to **randomize** that list so that that the sports listed will appear in a random order. **However**, we want to keep **Other** at the *bottom* of the listing. Here’s what to do:

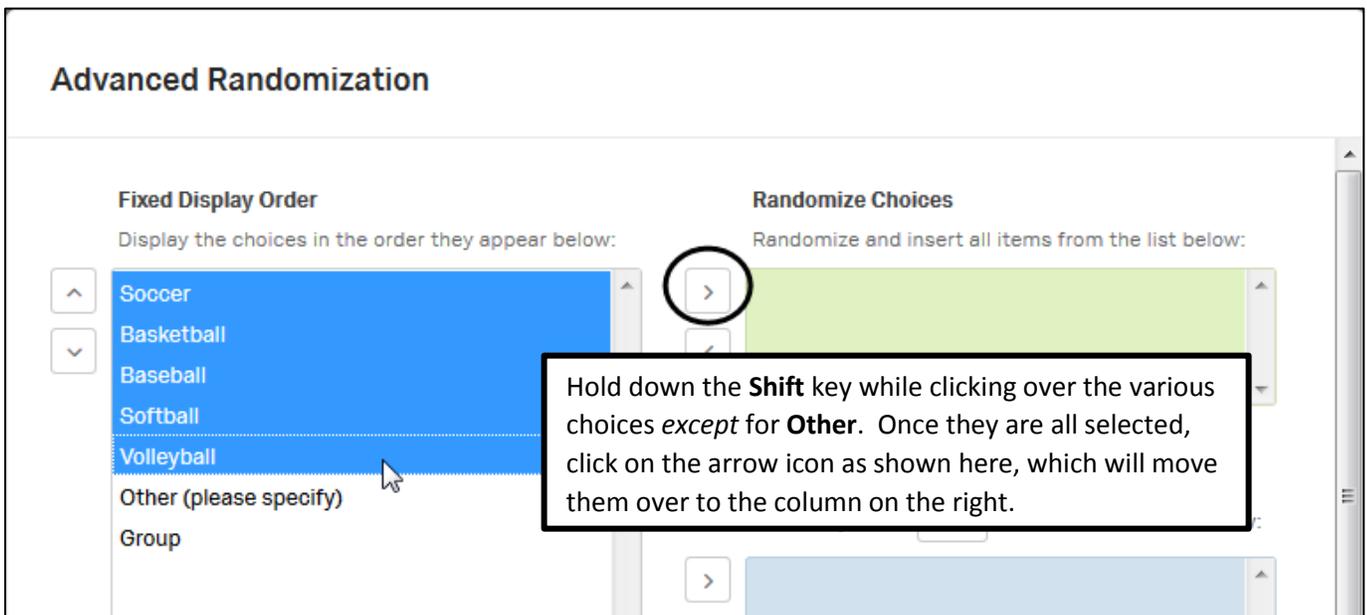
- a. Click on the gear icon next to your original multiple answer question regarding sporting events attended. (Again, **NOT** the one you just created using the "carry forward" option! The *original* one!) From that drop-down menu, select **Randomization**:



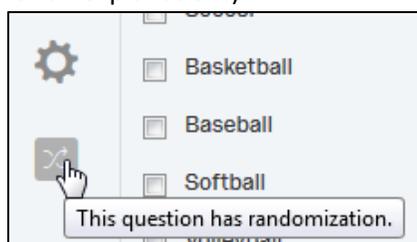
- b. On the ensuing dialog box, select the radio button for **Advanced Randomization**, and then click **Set Up Advanced Randomization**:



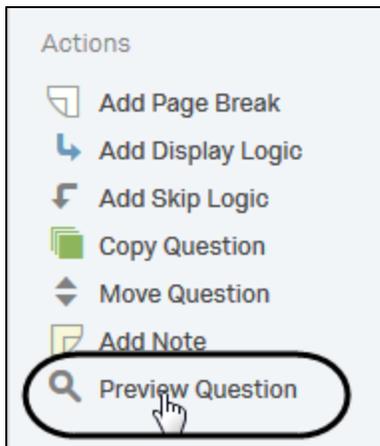
- c. You will see the screen shown below. By holding down the **Shift** key while selecting (in order to select more than one item at a time) select all of the choices **except** Other. After doing so, click on the top arrow icon so that they are moved over to the **Randomize Choices** window:



- d. Click the **Save** button at the bottom of that dialog box, and then click **Save** from the dialog box on the previous screen, and you are set.
- e. When question choices are randomized like this, you will see a new icon appear below the gear icon next to the question. (When in doubt about any icons, just hover your mouse over it for an explanation!)



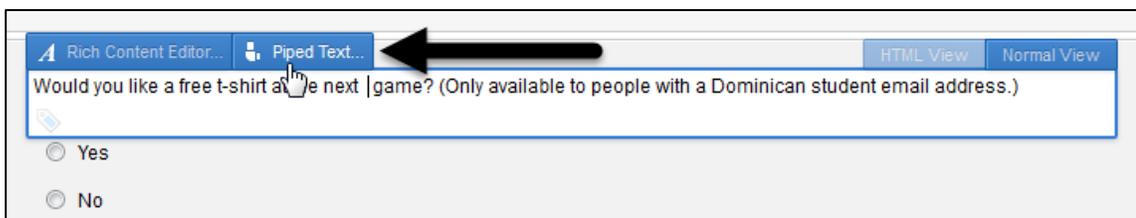
- f. Not sure if it will work properly? Rather than previewing the entire survey, you can also preview just an individual question by clicking within the question itself (which ensures, again, that the question is selected), and then by clicking the **Preview Question** link at the bottom right of the screen:



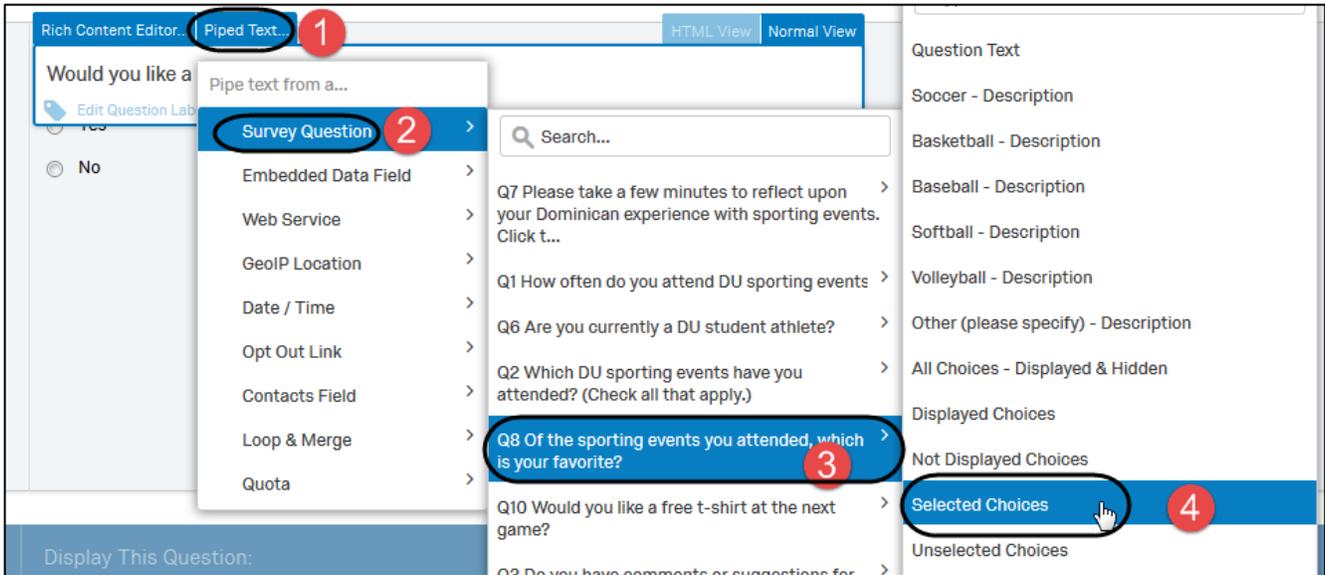
(Try this a few times; you *should* see a different order each time.)

## Piped Text

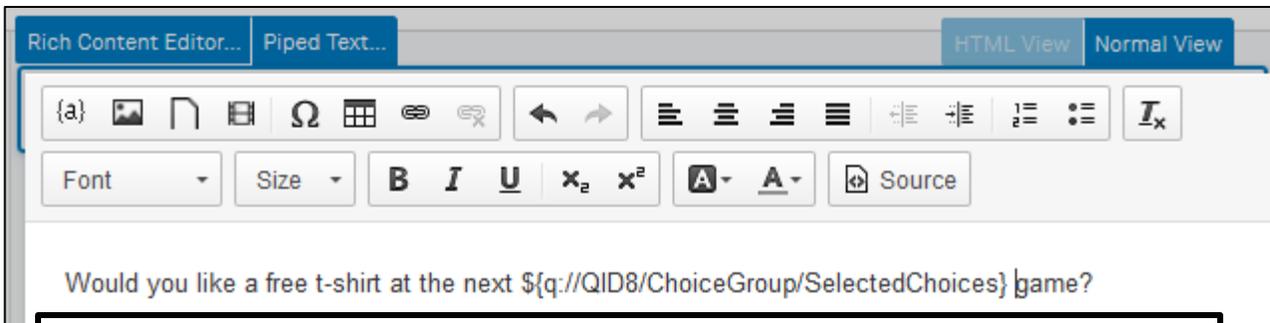
14. Now that we have had participants select their favorite sport (using the question that **carried forward**), we will offer them a free DU t-shirt the next time they come to that event.
- Below** the question asking them **Of the sporting events you attended, which is your favorite?** Add in the following multiple choice question:  
  
**Would you like a free t-shirt at the next game? (Only available to people with a DU student email address.)** [You can just hit the space bar a few times after the word **next**; we will be dealing with that below.]
  - Make sure **Automatic Choices** is enabled over on the far right, and make that a **Yes/No** answer choice, giving only 2 options.
  - Next, instead of those blank spaces, we are going to display the **name of their favorite sport**. We do this using a feature called **Piped Text**. Click back up in that question, and in the editor be sure to position your cursor where you added some blank spaces in the middle of the question. Then, select **Piped Text**:



- This leads to a cascading array of choices. Basically, for this we will stick with **Survey Question**>>**Of the sporting events you attended...>>Selected choices:** (Your question numbers displayed will likely differ from the screen capture below):



- e. When finished, your question will look a little bit like a mathematical nightmare after clicking **Rich Content Editor**, but do NOT change it, other than (perhaps) the spacing *around* the piped text:



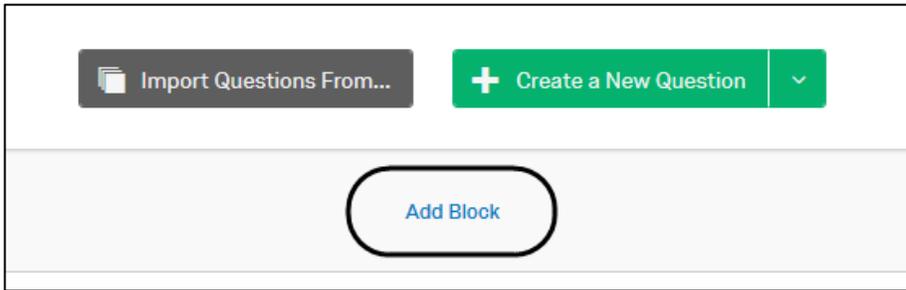
**IMPORTANT:** We have seen issues in *Internet Explorer* when the piped text appears *after* the question rather than within the question while editing it. You may want to switch to a different browser if using *IE*.

- f. We are not quite done. Whenever you have to rely on the wording from a previous answer choice getting piped into another question *immediately below* it, it is best to insert a **page break** just **BEFORE** the question relying on that piped text. That way, the browser will be able to properly generate the piped text. So, add a page break just **above** your question that looks like the above screen capture. You should know how to do that now, so in the words of Captain Picard: "Make it so"!

**Adding a Question Block**

15. Next, we will add a **block**. **Blocks** are good for adding in more conditional "branches" to a survey. For example, you might have an entire set of questions for soccer fans, and another entire set for basketball fans. Each of these would be in a **block** of questions that are dependent upon previous choices. Participants will **not** see any block names that you create; those will be for your own reference. Every survey already has a default block created called (appropriately enough) **Default Question Block**, seen at the very top of the survey you've been creating so far. To **add** a new block, head to the very, very end of your survey, and click **Add Block**:

Need help? Check <http://support.qualtrics.com> or send an email to: [support@qualtrics.com](mailto:support@qualtrics.com)



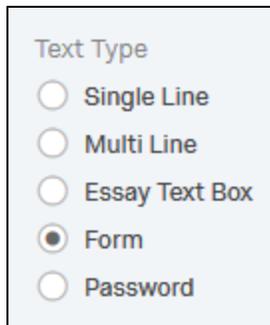
16. Name your new block **Free T-Shirt** by clicking directly on the block name:



### Form Entry Questions and Using Validation

17. Create a new question in this new block, making it **Text Entry**.

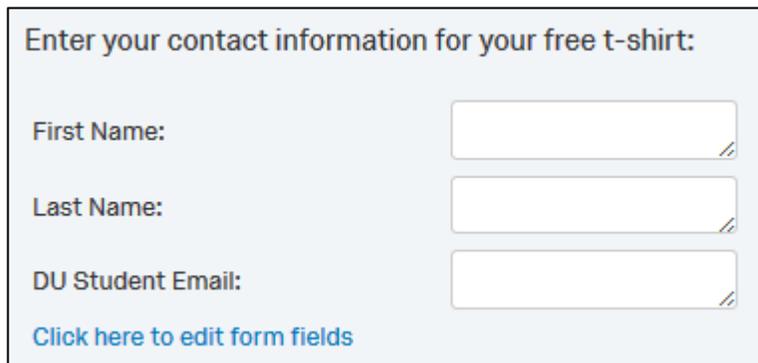
a. As soon as you do this, over in the text entry options on the right, select **Form**:



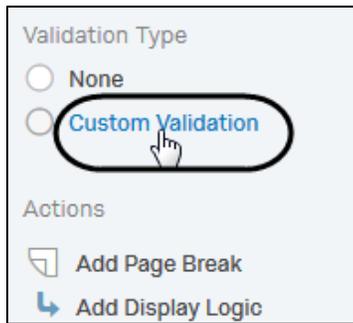
b. Where it says **Click to write question text**, type in:

**Enter your contact information for your free t-shirt:**

and for the choices underneath see the screen capture below:



- c. Now, you want to make sure that people input only a **student** DU email into the final text box. To do that, click on **Custom Validation** over on the far right:



This will bring up the following dialog box, which is relatively straight-forward in its choices of drop-down menus. Set the validation rule to your current question, and specifically to the final text box (DU Student Email). Then, you can specify that it **Contains @my.dom.edu** while enabling the checkbox to ignore case:

 A screenshot of the 'Custom Validation' dialog box. The title is 'Custom Validation'. Below the title, it says 'Validation will pass if the following condition is met:'. The condition is 'If Q13 Enter your co...our free t-shirt: > DU Student Email: > Contains > @my.dom.edu'. There are minus and plus icons to the right of the '@my.dom.edu' field. Below the condition, there is a checked checkbox for 'Ignore Case'. At the bottom, it says 'Choose an error message to display on failure:' followed by a dropdown menu set to 'Load a Saved Message'. At the bottom right, there are 'Close' and 'Save' buttons.

The final area, **Choose an error message to display on failure:** gives you the ability to use an existing error message or create your own. In many cases, an existing one will suffice, and *Qualtrics* has plenty built in.

To create your own, you can select **My Library** and then **New Message**. From the ensuing dialog box, type in a general description and then click **Create new validation:**

On the resulting screen, the first column (**Error**) is NOT what will be displayed for your users, but is more for your own reference. Just type in **Require valid DU student email address**. Then, in the text box to the right, type in the message you want to display to users. It will something like this when finished:

Click the **Create New Validation** button at the bottom of the dialog box, and your **New message** dialog box should now look like this. Note that your actual message does NOT appear here:

## New Message

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**Description**

**Destination Folder**

Error	Message	
Require valid DU student e...	Please enter a valid Dominican student email address.	✗ Delete
Enter error name...	Enter custom error message...	✗ Delete

Add Validation
Create New Validation

Cancel
✓ Create Message

Click **Create Message**, and then **Save** from the next dialog box, and that should do it!

The best way to make sure your custom message is working is to do a **Preview Survey** or two, which is explained below.

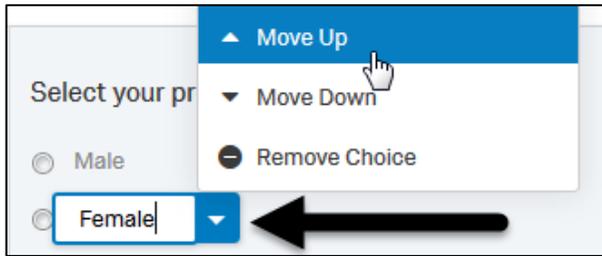
### Validation Reality Check: The Above Was a Heavy-Handed Example

Be aware that if the user does not pass validation for a question like this, they will not be able to submit the survey *at all!* This specific example is an extremely heavy-handed validation, though it gives you an idea of what this powerful tool can do. Ideally, you would make clear—*early on*—that one would have to be a Dominican student to even *take* the survey! A simpler validation rule—and one that is built into *Qualtrics*—is to simply ensure that the field has an **@** within it for an email address.

17. Now, add a multiple choice question immediately *below* that one, with the following as text:

**Select your preferred gender for sizing:**

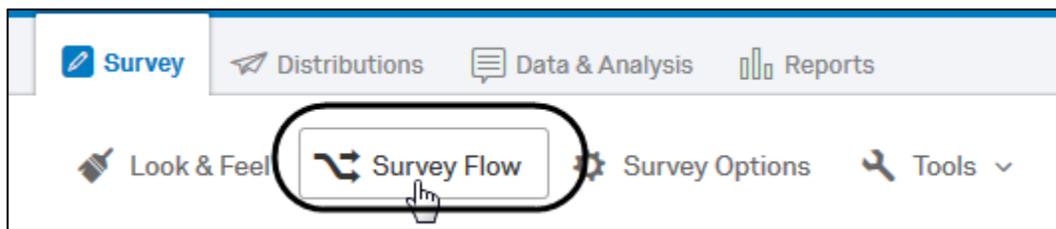
As soon as you click away, assuming **Automatic choices** is enabled over on the far right, you should see **Male/Female** appear as choices. Don't like the order of those default choices? Click directly on one of the two, and you will see a drop-down arrow where you can select to **Move Up** or **Move Down**:



### Survey Flow

When you start building additional question blocks, include various logic, and so on, it can be hard to see if the survey is going to appear like it should. (But you ARE going to TEST every survey that you ever create. Multiple times. Right!?!?) That's where checking the **Survey Flow** comes in.

17. The questions you just created (filling out the form for a free t-shirt) should appear only to those who answered **Yes** to the earlier question regarding whether the participant wants one. The t-shirt questions were in their own **block**. To have a block appear for some users but not others, you must create a **branch**. This is done using the **Survey Flow**. To do this, click this icon at the top of the screen:



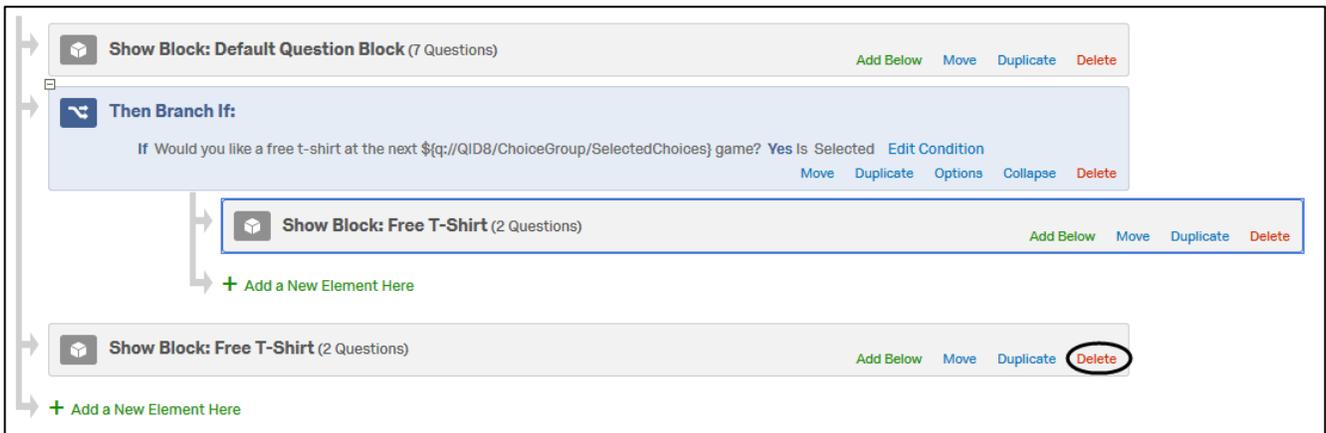
- a. On the screen that you see, for the block that has all of the other questions, click **Add Below**.



- b. On the ensuing dialog box, click the **Branch** icon. (Not **Block!** That will come after you specify the branch.) You will see a message that you must first **Add a Condition**. Click that.
- c. Next, select the question that had the piped text, and specify it must be **Yes**. It should look something like this when you are finished:



- d. Now, click the **Add a New Element Here** link at the bottom. On the ensuing screen, specify **Block** this time, and specify your **Free T-Shirt** block. The Flow should now look like this:



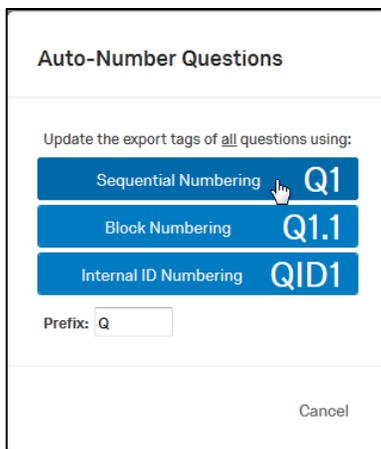
- e. Now you can click the **Delete** link (circled above) on the FINAL block for the Free T-Shirt. This way, people will NOT see this block at all if they did not meet the condition you specified.  
 f. Finally, click the **Save Flow** button at the very bottom, and you are finished!

### Auto-numbering

18. Odds are, your survey is a mess by now so far as consistent numbering is concerned! First of all, be aware that survey-takers will NOT see the numbering by default, unless you want them to. But to have them in proper order at least from your perspective, click on the **Tools** button on the top of the screen, and select **Auto-Number Questions...** :



You will be prompted with a choice of three different numbering formats. Just click on any of the three:



You will immediately see how this looks on your survey.

## Survey Usability Tip: Let the User Know They Have Reached the End of the Survey

We have all seen lousy surveys. As you preview and, more importantly, **TEST** your survey—which you **ARE going to do** (see more below)—you may catch several errors. But one of the biggest mistakes (in our opinion) is not letting the user know when they are at the end of the survey before clicking the final button!

Here's the issue: *Qualtrics* allows you to set a **Forward** or **Back** button choice, and even a progress bar. All choices are available under the **Survey** tab, and then **Look & Feel>>General**, as shown below.

The screenshot shows the 'Look & Feel >> General' settings panel in Qualtrics. On the left, there is a navigation menu with 'General' selected, and other options like 'Fonts', 'Colors', and 'Advanced'. The main settings area includes:
 

- Next Button Text:** A dropdown menu set to '>>'.
- Back Button Text:** A dropdown menu set to '<<'.
- Progress Bar:** A dropdown menu set to 'No Progress Bar'.
- Page Transition:** A dropdown menu set to 'Slide'.
- Questions per Page:** An empty text input field.
- Highlight Questions:** An unchecked checkbox.
- Question Separator:** A checked checkbox.

However, that default >> icon to move forward appears after the **final** survey question, as well. A user may think that another series of questions is coming and not realize s/he is submitting the survey when clicking the final >> button. And after submitting it, of course, there is often no going back! Admittedly, this is not always possible—especially with a survey that can branch off in several places where you are not certain what the final series of questions will be. But for most surveys, there are two ways to deal with this.

### Option 1: Add a Text Entry Saying the Next Button Will Submit the Survey

Just add a "question" at the end, but instead of a question make it **Descriptive Text**, which is one of the question options on the right-hand side. It could be something like this:

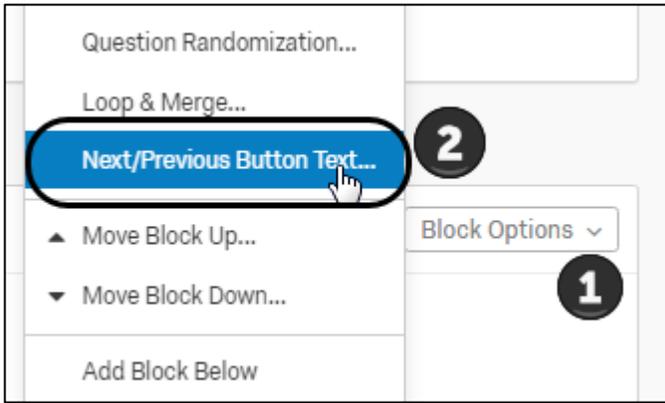
The screenshot shows a 'Descriptive Text' question block in Qualtrics. On the left, there is a checkmark icon, the question ID 'Q10', and a gear icon for settings. The main text of the question is:
 

Clicking the button below will SUBMIT your survey. If you would like to go back and check anything you answered, please do so now.

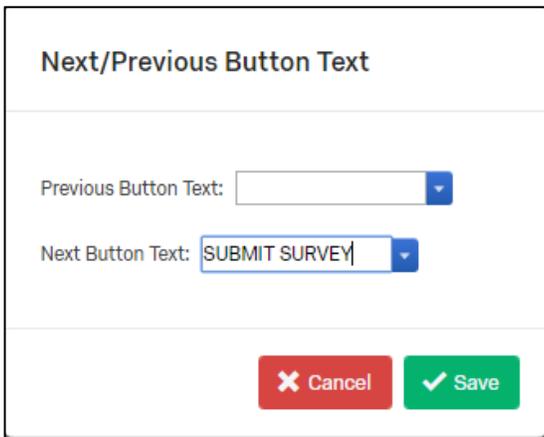
This is also the method to use if your survey can go off in multiple, alternative branches depending on previous choices made. Add one, final question Block at the end that *everyone* has to go through (using **Survey Flow**), and have descriptive text in that block, with (preferably) a final **Submit** button, which we cover next.

### Option 2: Create a SUBMIT Button

*Qualtrics* does not make this easy to do. You want to head to the last Survey Block that will serve as the last series of questions participants go through. (*Every* survey has a survey block—even simple surveys.) At the top of each block, there is a drop-down menu called **Block Options**. Click that, and select **Next/Previous Button Text**:



For the **Next Button Text**, you can type in whatever you want to show it's the end of your survey:

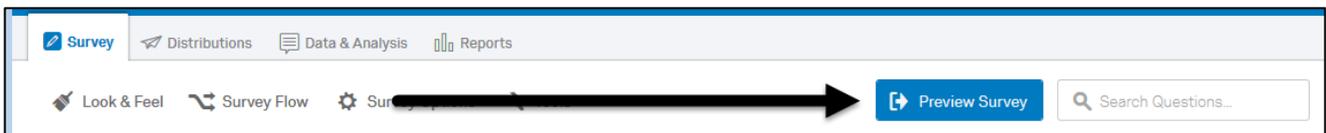


The final result on your survey will look like this. This is *much* better than that stupid >> button!



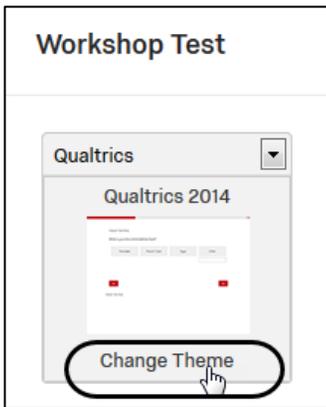
### Previewing the Survey

Now, to see how the entire survey will look when deployed, click the **Preview Survey** button at the top, under the **Survey** tab:



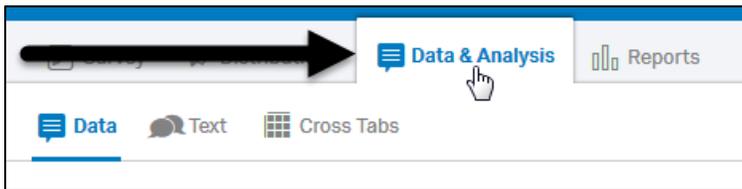
When you do, you will fairly closely replicate the entire user experience. *Qualtrics* also thoughtfully gives you an idea of what the mobile version will look like in a right-side panel that you can collapse, but be aware that you should not ignore it!

Don't care for how your survey looks? Click the **Look & Feel** button (seen on the above screen capture) and then click the **Change Theme** link immediately below the current theme:

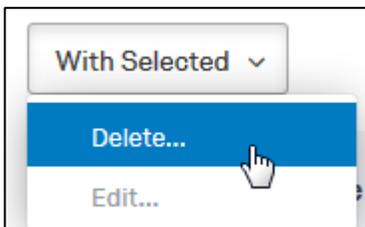


While previewing, check if your choice of wording in certain questions is affected by the look. For example, consistently using “check all that apply” may not be valid for certain formats, including the default format, which is geared more for touch screen users. Perhaps you need to say “select all that apply” instead.

To get a “quick and dirty” look at responses generated from when you previewed the survey (yes, “previewing” *does* generate responses!) and what responses will look like, click the **Data & Analysis** button at the top:



To **REMOVE** those responses before having your survey go “live,” click the top-most checkbox to enable all checkboxes on the screen, and then click **With Selected>>Delete**:



## Don't Even Think Of Sending Out Your Survey Without Testing It!

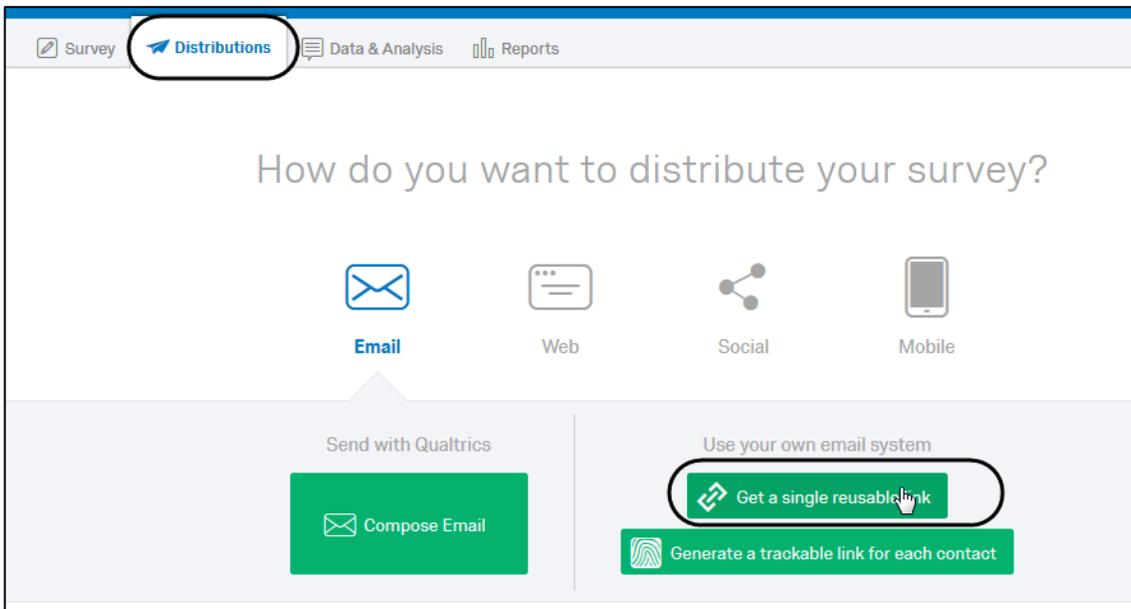
This cannot be over-emphasized: **test your survey by distributing it to a select group of people, other than yourself.** (You know it too well by now, so this does not mean simply “previewing” it, as outlined above.) You *can* distribute it as though it were “live” (see below) but can later PAUSE it to make some needed changes if anything is spotted during testing. Do the following:

- Ask a completely non-involved office partner to preview it.
- Get a student worker to preview it. (You're always looking for something for them to do, anyway.)
- Have people not only check for obvious typos, but check for survey flow, and also the possibility of a ***misunderstood question***.
- Have people check it on ***their mobile devices***—especially if your target audience is students.
- “Accidentally” close the browser. Launch a new browser.
- Try it on ***every freaking browser you have!*** (If you only have one browser on your computer—***shame on you!*** Not everyone taking your survey is going to use whatever browser you happen to have, unless you're inviting all survey participants to your office to take it!)

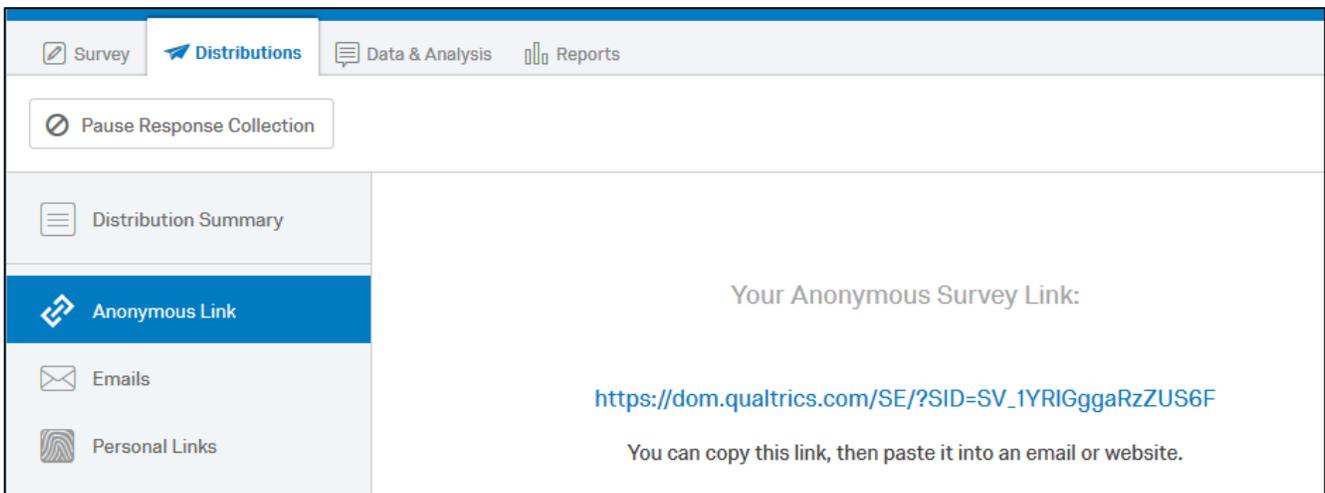
Unless you plan on distributing your survey solely to rocket scientists who are also part-time web developers and who have a Master's degree in English, “stuff” *can and will go wrong* on a survey. **Expect** the worst—especially if you do not test your survey enough.

## Distributing Your Survey

If you just want to email a survey link out to a pre-designated email distribution list—or perhaps share it first with a select group of individuals to test things out (remember, **TEST** your survey!!!)—the quickest way to do this is from the **Distributions** tab and then by clicking **Get a single reusable link**:



Once you do this, you will see the following screen:

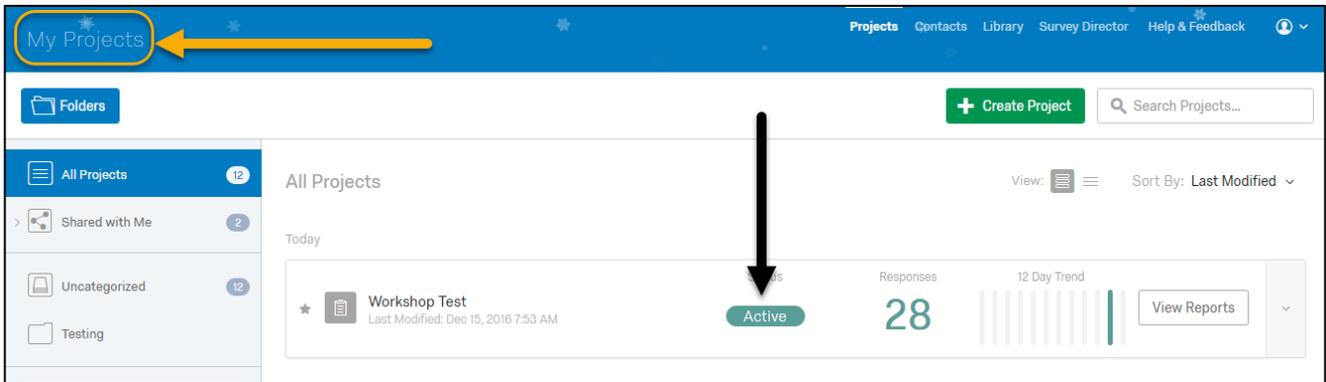


Copy and paste that generated link. (If you forget to, no worries....just return to the screen shown above.)

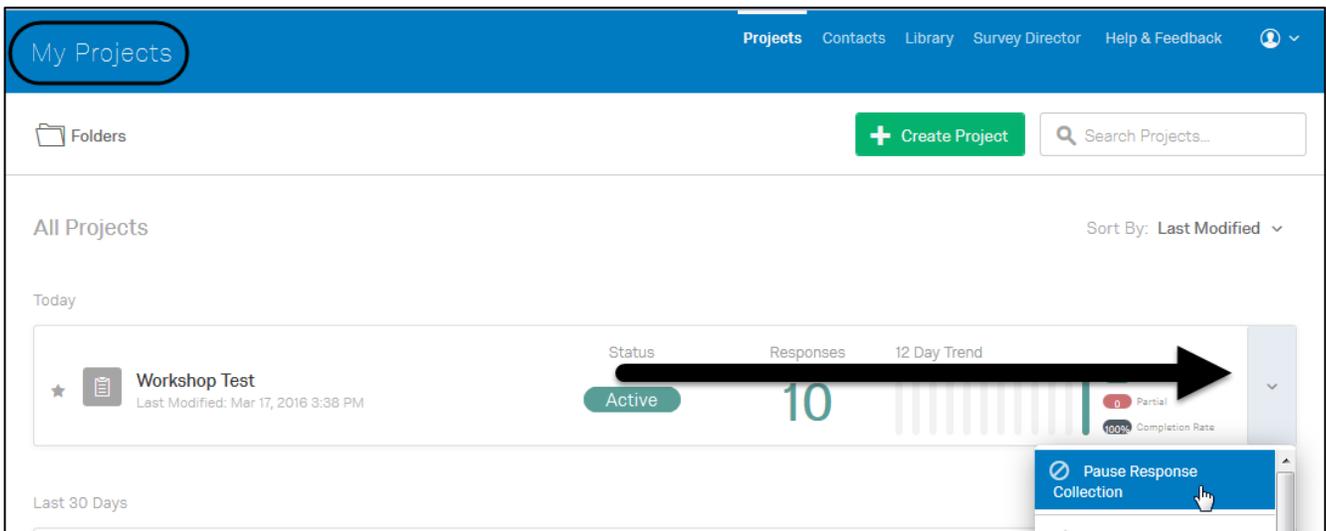
Your survey is now **up and running**. If you realize belatedly that something is wrong with the survey—or if you were just testing it first with a select few individuals (did we mention you should **test** your survey?)—you should click the **Pause Response Collection** button shown on the screen capture above (two buttons above the **Anonymous Link** button). After you've made your fix, you can click the **Resume Response Collection** button

that you'll later see on this screen. (Also, don't forget you can REMOVE responses by following the instructions on page 22.)

You can tell that a survey is active by clicking the **My Projects** "breadcrumb" on the top left of any *Qualtrics* screen. That will display the status of your surveys:



You can also **pause** a survey from the **My Projects** screen. Click the drop-down menu at the far right of an active survey to do this:



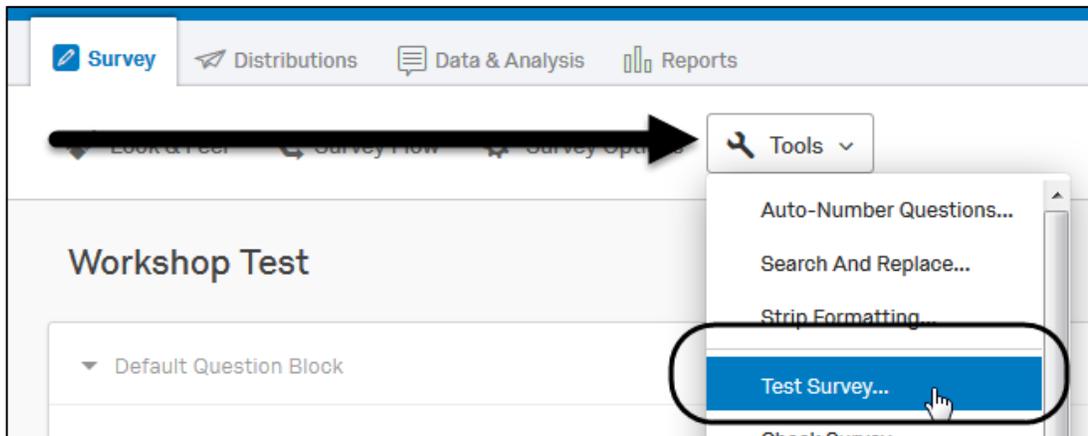
While creating an anonymous link and emailing the link to your survey participants is certainly the easiest method of distributing a survey, it is not necessarily the *best* because anyone with the link can complete the survey multiple times if on a different browser or computer. To ensure that only a person can complete each survey *once*, it is best to use the **Email Survey** option, which allows you to upload a distribution list. See our separate handout on survey distribution for this, as well as consulting the *Qualtrics* help.

For more information on **Survey Distribution**, consult our separate handout. Also, do not forget about checking the **Survey Options**, as shown on page 2. (Oh, and did we say you should **TEST** your survey, not just Preview it?)

## Viewing Reports

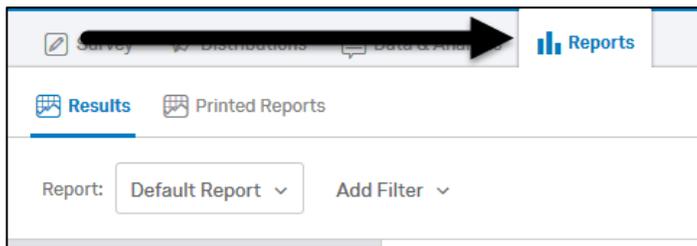
To see what reports will look like even before you distribute your survey, *Qualtrics* has another trick up its sleeve that will come in handy, and that is its built-in ability to run a **test survey**. While this will not help with any typographical errors or misunderstanding a question—not to mention a form fill-in type of question with validation such as what we have in the exercises—it *can* help with giving you a general idea of how the survey **results** will look.

To run a test survey, from survey tab click the **Tools** menu and then click **Test Survey**:



This, in turn, will give you a screen where you can type in a number of test surveys to have *Qualtrics* “take,” enabling you to see the results. (Just don't forget to remove those results later! See page 22 for how.)

The **Data & Analysis** tab shown earlier may suit you just fine for seeing your responses, especially for shorter surveys. But more comprehensive information is available from the **Reports** tab:



The first time you do this, you will be in the **Default Report** view, which shows you a bar chart of responses for each question. You can go through the questions via a scroll box on the left side of the screen. At the far right, you can change the chart type by clicking on the icons shown where the solid arrow is pointing in the bottom of the screen capture below:



The chart options change depending on the question type as you scroll through. For example, text entry questions allow you to create a word cloud.

Using the **Report Options** drop-down menu (dashed arrow at upper-right corner of screen capture above), there is the ability to **export** a report to *Word*, a PDF, or a CSV file. You can also make a report “public” by placing it on the web, complete with the ability to password protect it so that it is (somewhat) private. Check the excellent online documentation for more information by going to <http://support.qualtrics.com> .

### Final Thoughts

Qualtrics has **many** more capabilities than what is covered below. If you are interested in learning more about survey options, be sure to consult:

- <http://support.qualtrics.com> .
- If you run into issues you just cannot figure out after checking their help and documentation, they have 24-hour email support at: [support@qualtrics.com](mailto:support@qualtrics.com) . Based on our own experience, they answer email inquiries fairly quickly; usually within 24 hours or so.