

Office of Institutional Research and Planning Reference Guide for Using Qualtrics at NC State

Through extensive experience using Qualtrics and serving as the Qualtrics administrators for NC State, OIRP has created this resource guide for **beginner tips** on getting started with Qualtrics, along with some **advanced tricks** for solutions to common challenges in survey design.

This document is not intended to be a guide to general Qualtrics use, but instead serves as a supplement to other training resources. The [Qualtrics Support](#) website is the most comprehensive resource for information on how to create surveys, distribute surveys, and use advanced building options. In addition to detailed text and visual guides, the support website has a [video training series](#) for beginners and a [community forum](#) where survey designers can post questions and get help from other Qualtrics users.

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Basic Survey Building/Editing Tips

Question Types

- To add text/instructions in your survey, choose the question type **Descriptive Text**, which will display text without answer choices.
- If you have many questions that share the same set of response options, use the **Matrix Table** question type instead of the multiple choice question type. This saves time in building the survey and saves screen space, making it is easier for respondents to answer.
- For matrix questions that ask many items, the Repeat Headers option enables users to see the response options as they scroll down the page to answer each statement. In the question selection pane on the right-hand side of the screen, click “Repeat Headers” under Options.

Question Numbering

- To re-number all survey questions at once, go to Tools -> Auto-Number Questions.
- To display question numbers to survey respondents, go to Survey Options -> Show Question Numbers.

Page Breaks

- To add a Page Break between questions, click the question you want the page break to appear after. On the right-hand question pane, click “Add Page Break” under Actions.

Using display and skip logic

- To set up display or skip logic, click the gear icon next to the question for which the display or skip logic will be applied and select “Add Display Logic” or “Add Skip Logic.”
- Display logic allows you to conditionally display or hide the question to which the display logic is applied. Display logic can also be applied to answer choices in a question.
- Skip logic allows you to skip the participant down to another question in the survey or to the end of the survey based on how they answer the question to which the skip logic is applied.
- Note: Qualtrics displays questions in the order they appear in the Edit Survey page, regardless of how the questions are numbered. A question that uses display logic must be placed after the question or questions used to determine if the question when the question should be displayed.

Printing and Viewing Surveys

- To view and interact with your survey as others will see it, click **Preview Survey**.
- To print a copy of the survey as others will see it, go to Tools -> Import/Export -> Print Survey.
- To download your survey as a word document, go to Tools -> Export Survey to Word.

Using Code to Customize Surveys

- JavaScript can be used to customize the appearance and functionality of survey questions. Qualtrics Support provides information on [adding JavaScript](#) to a survey.

Adding a Progress Bar and Back Button

- Add a progress bar by going to Look and Feel -> General and choosing a style from the list of options.
- To add a Back Button, go to Survey Options -> Back Button. The Back button allows respondents to go to previous pages in the survey. The Back button works between separate blocks of questions unless there is an element, such as branch logic, placed between two blocks in the Survey Flow menu.

Saving/Undoing Edits

- Qualtrics automatically saves edits as you work.
- You can manually save work by selecting CTRL + S or undo work by selecting CTRL + Z.
- You can view previous versions of the survey by going to Tools -> Versions -> View Version History.

Distribution Methods

There are two URL options for distributing a survey in Qualtrics: Email Survey and Anonymous Survey Link.

Email Survey (Qualtrics Mailer)

The distribution method that offers the most features and flexibility is the Qualtrics Mailer. To use the Qualtrics Mailer, you will need to create and upload a Contact List in **.csv** format that includes email addresses for all the recipients and any other data you want associated with each participant (e.g., name, gender, etc.). You then click “Compose Email” on the Emails pane of the Distributions tab to send an email to your contact list. By default, each recipient will get a **unique link** to the survey, which lets a recipient submit the survey *once*. Using this unique link, you can track respondents, associate respondent data with information in the contact list, personalize invitations, track mailing history, and automate sending reminder/thank you emails.

Anonymous Survey Link (Open-Access)

The alternative option of distribution is to use the Anonymous Link. When you activate your survey, Qualtrics generates a single survey URL. The survey link can be copied and pasted into emails, letters, websites, and so on. Everyone uses the same link to access the survey. The **Social Media**, **QR code**, and **Survey Director** distribution methods all use this same link. With **Social Media**, you can post the survey link on various sites such as Twitter, Facebook, LinkedIn, etc. A **QR code** is type of barcode that can be scanned by a smartphone using the phone’s camera or a QR reader application, which opens the survey in the phone’s web browser. **Survey Director** is a tool you can customize to conditionally direct participants to different surveys, reports, or other URLs. Including an **Authenticator** element from the Survey Flow menu provides additional features.

Using the Anonymous Survey Link without an Authenticator

Using a survey link without an authenticator is an easy and simple way to distribute an open-access survey. This is the preferred method if you do not have a strictly defined survey population. You will not be able to track respondents or control access to the survey, but you can easily copy the link to handouts or flyers for wider distribution.

Note: The option “Prevent Ballot Box Stuffing” in the **Survey Options** menu prevents a respondent from retaking a survey *on the same device in the same browser* they previously submitted the survey. A respondent can retake the survey by clearing their browsing data (“cookies”) or by opening the survey in a different web browser.

Using the Anonymous Survey Link with an Authenticator

If you do not want to generate unique links (e.g., because you do not have email addresses for your population), but still want to individual access to the survey or allow participants to return to survey responses in progress, you can use the survey link with an Authenticator. You will need to assign each of your respondents a unique, pre-determined ID or password that they will use to access your survey. You will also need to upload a contact list to Qualtrics that contains all of the possible IDs or passwords, and then pair this contact list with the Authenticator. When a respondent clicks your survey link, they will be asked to login with their unique ID or password before gaining access to the survey.

Note: Every contact list requires an Email field, so you will need to include dummy email addresses in the contact list.

To learn more about using contact lists:

<https://www.qualtrics.com/support/survey-platform/contacts/contact-list-overview/>

To learn about adding an Authenticator:

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/advanced-elements/authenticator/authenticator-overview/>

Using Survey Flow

Introduction

Survey Flow is an important and powerful feature of Qualtrics that everyone creating a survey should learn to use. On the Edit Survey page, each individual question is displayed on screen, and questions can be grouped together using blocks. On the Survey Flow menu (accessed from the Edit Survey page), each *block* is displayed instead of each individual question. The Survey Flow menu enables blocks of questions to be re-ordered, conditionally displays blocks of questions depending on survey responses or other information, and has a number of other useful features.

The following paragraphs briefly describe each of the features in Survey Flow, called “elements,” and how they are commonly used. Note that the elements described below refer to entire *blocks* of your survey. There are similar options that can be used for individual questions on the Edit Survey page. Every survey is unique and people are always finding new ways to use Survey Flow.

For in-depth tutorials on Survey Flow and the elements available:

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/survey-flow-overview/>

Block

The Block element is used to choose the block of questions to display. Importantly, repeating a block of questions in the Survey Flow is not the same as duplicating the block of questions. If a block of questions is repeated in the Survey Flow menu, respondents will see the same questions they already answered, including their original answers to the questions. In the results section, only their most recent answers to those questions are saved. Repeating a block in the Survey Flow menu can be useful if you want participants to review or make changing to previous answers. If you want to ask the respondents the same questions repeatedly and record their answers each time, you can copy individual questions or blocks of questions on the Edit Survey screen.

Branch

The Branch element allows you to route respondents to different blocks or perform other tasks using conditional logic. The Branch element for blocks is similar to the skip/display logic features used for individual questions. Within the Branch element, you choose from a dropdown list whether you want to branch based on a respondent’s answer to a previous question, information from an embedded data field, the type of device the respondent is completing survey on, or the respondent’s location.

Embedded Data

Embedded Data is any extra information you would like recorded in addition to the question responses. For example, if you have extra fields in your contact list (i.e., fields besides name and email address), the embedded data element can be used to add information from those fields to your survey data. The value for your Embedded Data field can be pulled from information that you have uploaded into a Contact List, information appended to the participant’s survey link, or, it can be a fixed value set in the Survey Flow. Embedded data can be used in several ways within Qualtrics such as for advanced logic, piped text, criteria for creating sample contact lists, or for filtering data in the Data and Analysis tab and the Reports tab.

Randomizer

The Randomizer element allows you to randomly present different blocks or elements within your survey to respondents. You can move the blocks beneath the Randomizer element and choose to either present all of the elements (e.g., blocks) in random order or randomly present a subset of the elements. If you choose to present a subset, you may want to check the ‘Evenly Present Elements’ box to make sure that each element or block is seen approximately the same number of times. The Randomizer element is useful for experimental design surveys where you want to randomly assign respondents to experiments or a control group. Keep in

mind that there is also a randomization option outside of the Survey Flow menu on the Edit Survey page that can be used for individual questions.

Web Service

The Web Service element allows you to pull information from an external website and use it as embedded data. After creating the Web Service element, you can then pipe this embedded data into your survey questions or answer choices. For example, you can copy a RSS (Really Simple Syndication) feed link for recent headlines from a news site into your Survey Flow. You can then create a question in your survey (e.g., “Rank these news headlines from most to least interesting”) and pipe the news headlines into the answer choices.

Group

The group element is a tool you as a survey creator can use to organize other elements within your Survey Flow by grouping them together as one unit. This is especially useful if your Survey Flow is very long and complex and you want to move around multiple consecutive elements at once rather than moving each element individually.

Authenticator

The Authenticator element is used to verify respondents’ information by prompting them to ‘log in’ before getting access to the survey. The Authenticator is useful for when you don’t have email addresses or want to use the single Survey Link but still want to control access to the survey. You will need to provide respondents with a login id that you create. You can change the options for the Authenticator, such as the number of allowed log in attempts, the error message displayed, and the ability to save and continue. You have the option to authenticate only certain blocks of the survey or the entire survey. If you want to require authentication for the entire survey, be sure to move the Authenticator element to the top of the Survey Flow and move all other blocks underneath and within the Authenticator. For the authenticator to work correctly, all authenticated blocks should be indented to the right underneath Authenticator element. Otherwise, even if a respondent fails authentication, they will still be able to click next to the rest of the survey.

End of Survey

The End of Survey element skips respondents to the end of the survey early. The End of Survey element is often used with other survey flow elements. For example, suppose you want 100 students from each class to complete your survey and you already have responses from 100 sophomores. Once the quota is met, you can skip all sophomore respondents to the end of the survey. In the End of Survey element, click ‘Customize’ for additional options.

Reference Survey

The Reference Survey element is most useful when you have a set of questions that need to be consistent across multiple *surveys*. The Reference Survey element “calls in” questions from a reference survey in your **Survey Library** and adds them to the Survey Flow of the survey you are working on. These questions can only be edited by going to the reference survey in the Survey Library. When changes are made to the questions in the Survey Library, those questions will be updated across all surveys that use them.

Table of Contents

The Table of Contents element allows you to create a list of different sections of your survey and display this list to respondents. Respondents can use this list to navigate to different sections of the survey in the order that they choose.

Handling Responses in Progress

Often a respondent may answer fill out part of a survey and exit in the middle of it, with or without the intention of returning at a later time to complete it. Alternatively, sometimes when a respondent receives a request to take a survey, they may open the survey and preview it before coming back at a later time to finish it. There are a few things to keep in mind about handling partially completed surveys (“responses in progress”) in Qualtrics.

Things to Know...

- It's a good idea to let the respondents know ahead of time (e.g., in an email or introduction) how long the survey is expected to take to complete. Also, consider adding a Progress Bar to your survey. Keep in mind though that the progress bar can be misleading if you have skips and branching elements in your survey.
- If you distribute your survey with the Qualtrics Mailer, respondents can exit the survey and return to the page they left off and at any time before the survey is closed or before the survey link expires (by default, individual survey links generated via email expire after 60 days. This setting can be changed in the “Compose Email” menu). Note that once a respondent has clicked the final arrow button (“next” button) of the survey, their survey response will be recorded and they will not be able to retake the survey.
- If you distribute the survey using the Anonymous Link, you will need to go to Survey Options and check the “Save and Continue” box to allow users to return to the survey where they left off. This will put a cookie on their browser that tracks where they left off. Note that if the respondent returns to the survey using a different browser or service, they will have to start from the beginning.
- When a respondent starts a survey and answers some, but not all questions in the survey, Qualtrics flags the survey session as a “response in progress.” By default, Qualtrics converts “responses in progress” to “recorded responses” if the survey session remains inactive for seven consecutive days. This setting can be changed under Survey Options.
- When you close a survey (or “Pause Response Collection”) in Qualtrics, you are presented with two options: “Close all active survey sessions and record them as partial data” and “Allow all active survey sessions to be finished.” If you select the option “Close all active survey sessions and record them as partial data” and then resume data collection at a later point in time, participants who had a response in progress will not be able to edit their original survey response.

Adding a ‘Submit’ button

A response in progress will not be converted to a recorded (completed) response until the final forward arrow (“next” button) is clicked. It can be helpful to add a ‘Submit’ button to the end of the survey to give participants a visual indicator of the final button they need to click in order to finish the survey.

To create a ‘Submit’ button, create a block at the end of the survey containing just the last page of the survey that participants should see. Under ‘Block Options,’ choose ‘Next/Previous Button Text’ and change the “next button” text to “Submit.”

Advanced Tricks

This section of the guide identifies some advanced tricks for common challenges in survey design. Detailed instructional guides on using the major features discussed are available on the Qualtrics Support website and are linked in the text below.

Design Challenge: Showing different text to different participants in the same survey

Sometimes a researcher wants to ask all of their participants the same set of questions, but needs some of the text in the survey to be personalized to the survey taker. The [piped text](#) feature can be used to “pipe in” an individual’s response to one question in the survey into the text of other questions in the survey, but it can also be used to “pipe in” text from embedded data fields you create in the Survey Flow. [Embedded data fields](#) are a simply a way for you to add information you know about a respondent ahead of time to their survey session. Embedded data can be pulled from a few different sources, but researchers typically use one of two methods:

Contact list method: If you know who will be invited to take the survey and the relevant personalized information about each person, you can upload a contact list containing that information to Qualtrics. In order to protect respondent confidentiality, the ability to attach email address, first name, and last name from contact lists to survey records is disabled by default on NC State Qualtrics accounts. However, you can include other participant attributes, such as gender or age on the contact list, and create embedded data fields that embed that information into the respondent’s survey session. You can associate contact list information with a respondent’s survey session by sending an email to the contact list through the Qualtrics Mailer or by using the [authenticator](#) feature.

Survey URL method: If using a contact list doesn’t work for your survey design, another solution is to insert the personalized information into the survey URL itself – such as a survey of athletes that displays the name of the sport they play in the question text. This is especially useful when you don’t know who exactly your participants will be, but you do have a way to send different survey links to different groups of interest – for example, by asking coaches of various sports to send a survey link on your behalf to each of their players. The process involves, in sum:

1. Creating an embedded data field at the top of the Survey Flow for the variable of interest, e.g., “SportName” (case sensitive)
2. Appending the name of the field (“SportName”) and the personalized text you want the respondent to see in the survey (“Soccer”) to the end of an anonymous survey URL, e.g.:
[anonymous Qualtrics link]?SportName=Soccer
[anonymous Qualtrics URL]?SportName=Field Hockey
3. Using the piped text feature to “pipe in” the text value that was appended to the URL the respondent clicked on into the text of a question.

In the collected survey data, each survey record will include the information that was appended to the link the respondent clicked on to go to the survey.

Design Challenge: Repeating the same set of questions many times in a survey

Sometimes a researcher wants to loop respondents through the same set of questions multiple times, changing one or more elements about the questions each time. For example, a survey taker may be asked to answer the same five evaluation questions for six different job candidates where each set of questions pertains to a different candidate. In some cases, the survey design requires a very large number of loops (dozens or even hundreds) – so many that it would be very difficult to manually duplicate and modify each set of questions.

[Loop and Merge](#) is a feature in Qualtrics that allows you to repeat a single block of questions multiple times based on a list of iterations you define (including words or images) or on the respondent’s answers to a previous question in the survey. Loop and Merge can also be set up to randomize the order in which respondents see each loop and limit the number of loops they see.

Troubleshooting Survey Access Problems

The following are possible messages that respondents may see when trying to access your survey. If a respondent gets one of these messages and has not completed your survey, follow these solutions to troubleshoot the problem.

Message: “Thank you for taking the survey. Your response has been recorded.”

Solution:

- This message is displayed when the survey link has already been used. To send respondents a new survey link, go to Data and Analysis-> Respondents. Under Actions, click the drop box and select “Retake Survey” or “Retake as New Response.” A survey link will be generated that can be used to retake the survey.

Message: “Page cannot be displayed.”

Solution:

- Some email accounts are set up to automatically disable links. When users click on the link, they may see a message such as “page cannot be displayed.” If this is the case, manually copying and pasting the survey URL into the address bar will give them access.
- Sometimes, a respondent’s browser may be causing the glitch. The easiest solution is to have them try the survey in a different browser.
- In rare situations, the respondent’s firewall could be blocking the Qualtrics website. If this is the case, the quickest solution would be to try taking the survey from a different location.

Message: “Your survey session has expired.”

Solution:

- It’s possible the respondent clicked your survey link when you first sent it out and then returned later to finish it. Survey sessions that are in progress, but have remained inactive for a period of time (by default, one week), are converted to completed responses in Qualtrics and are marked as expired. If this occurs and you can identify the respondent’s specific survey record, you can send the respondent a new link by going to the Data and Analysis tab. Under Actions, click the drop box next to the respondent’s survey record and select ‘Retake Response or ‘Retake as New Response’ to generate a new survey URL that lets them edit their original responses or start a new survey session. Expiration settings for responses in progress can be changed under Survey Options, but changes cannot be applied retroactively to survey sessions that have already expired.
- Alternatively, the survey link may have expired even if the respondent never clicked on it. By default, survey links sent out through the Qualtrics Mailer expire 60 days after the initial email is sent out. This setting can be changed under Compose Email -> Advanced Options.

Message: “Sorry, this survey has already expired.”

Solution:

- This message means that the data collection window for the survey itself has expired. In the Survey Options menu, uncheck ‘Survey Expiration’ or change the date range in which data can be collected.

For further support documentation on using Qualtrics, visit Qualtrics Support at <https://www.qualtrics.com/support/>.

You can also get in touch with the support team at Qualtrics online at <https://www.qualtrics.com/support-center/> or by phone at 1-800-340-9194.

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