What is Qualtrics?

Qualtrics is a web-based survey tool that is provided to Faculty, Staff, and Students through the University of Idaho. It integrates with any web-browser and requires access to an internet connection.

Login to Qualtrics

Visit surveys.uidaho.edu to login to the system using your University of Idaho credentials. To be eligible to use the system, you must have an active University of Idaho login as either a faculty member, active student, or staff member. Use of the system constitutes acceptance of all University of Idaho policies.

General Qualtrics Introduction

- Qualtrics is completely cloud-based. As you select different elements on a page, your work is saved. You can work from on or off campus using your login.

- GO SLOW. Most of the on-screen features have additional features in a drop down menu. Use your mouse to hover over everything until you get a sense of what and where things are.

- While Qualtrics is designed as a survey tool, there are multiple applications and possibilities with the system. There are also extensive resources available throughout the internet. Try visiting http://www.qualtrics.com/university/researchsuite/ for numerous videos, articles, and other resources.
Basic Navigation – The Research Suite

As you are going through this guide, you will be directed to different tabs within the Research Suite. These tabs are located across the top of your screen and refer to the different areas of development for your survey. Each Tab has a specific set of functions assigned to it. When you click on the Tab, the Tab Functions Bar will show the associated features. Below the Tab Functions is the Data-Bar. This data bar changes depending on the Tab and Tab Functions selected.

On most screens, the Data-Bar will allow you to quick select what survey you want to work with. Clicking on the Survey Name Dropdown will let you quick jump to a new survey.

My Surveys

When you login your Qualtrics account, your My Surveys Tab is the default page. You will also see below your Data-Bar all your surveys. Each column has a set of functions which act as shortcuts to different functions found under the Tab Functions Bar.
Survey Tasks

Survey Tasks are listed in line with each of your surveys. These tasks allow you to access different aspects of the survey directly from the My Surveys tab.

---

- **Edit**: Navigate to the Edit Survey tab and make changes to the survey.
- **Results**: Navigate to the View Results tab and view data from the survey.
- **Send**: Navigate to the Distribute Survey tab and distribute the survey.
- **View**: View a preview of the survey.
- **Collaborate**: Give another Qualtrics user access to the survey.
- **Copy**: Make a copy of the selected survey. You can copy to three locations:
- **Translate**: Translate your survey into multiple languages.
- **Delete**: Delete your survey. Deleted surveys cannot be recovered, so you will be asked to confirm this decision.

Creating a Survey

To start building a survey you can

1. Click on “My Surveys” Tab and then “Create Survey” on the Tab Function Bar or
2. Select the “Create Survey” Tab.
Either option will take you to the Quick Survey Builder. The Quick Survey Builder allows you to create a survey from scratch and start adding questions immediately.

Click **Quick Survey Builder**.

Enter a name for your survey and choose a folder to save it in. If you don’t have a folder you want to save it in, leave this field blank.

Finish by clicking **Create Survey**.

Once you’ve followed these steps, you will be taken to the **Edit Survey Tab** where you can begin adding questions to your survey.

**Look and Feel (under the “Edit Survey” tab)**

When you click on the look and feel icon on the Tab Function Bar (under Edit Survey) you will see four horizontal tabs:

- **General** - Controls the user interface including buttons, you can add a progress bar and limit questions per page (with consideration to block options)
- **Fonts** – You can change the fonts for your survey, as well as select different fonts for questions and choices
• **Colors** – Here you can change the shading of questions, the background color, footers and so forth. Overrides the CSS.

• **Advanced** – Load and use custom CSS

---

**Survey Options (under the “Edit Survey” tab)**

Survey Options is one of the more powerful features in Qualtrics. There are several features that are listed here. While many of the features are enabled for users (and have been pre-configured by OAA and Qualtrics), it is recommended that users avoid changing options until they are more comfortable with how each option works and interacts with the survey system as a whole.

*Options changed only affect the survey selected.*

Some of the more common options that users may want to change are:

- **Back Button** – Enable this to provide respondents with the option of going back a page
- **Save and Continue** (Enabled by default) allows individuals who were mailed a survey from the survey mailer the option of completing their survey at a later time.
- **Survey Title** – Changes the tab text and page header text in the respondents browser
- **Open Access** (Enabled by default) – any person with the survey link can take the survey
- **Ballot Box Stuffing** – prevents people from taking the survey more than once
- **End of survey message from library...** - allows you to create a custom end of survey message
- **Redirect to a URL** – allows you to direct completers to a specific webpage

---

**Adding Items (Questions) to your survey**

Qualtrics has many item types in the research suite. A full listing can be found in the [Question Types Guide](#). Questions are organized into blocks, and each block represents a webpage to the respondent (unless otherwise configured)

You can change the block title here
Copy Items
- Copy an item (question) from a previous survey of yours OR from the Qualtrics Library of Questions

Create a New Item
- Allows you to insert a new item (question) from the available types. Your account has all item types available to us under our license agreement.

When you HOVER over Create a New Item, you will see a drop down menu appear, this is a quick select to the item types.

When you hover over each item type, you will see another drop down which has an variety of different sub-item types. When you hover over those, examples will pop-up.

Once you have inserted an item, the Item Type and Options Menu appears on the right hand side of your screen.

Type your question here. Click on it to open an editor

Type your responses (choice options) here. Also see number 3 below.
1. You can change an item type at any time. Elements of that question that are not relevant to the new item type will be “hidden” and can be recovered by changing the item type back.

2. To edit a question, or a potential response, just hover/click on the text. Editors will open.

3. You available number of choices can be changed under “choices”. If you have a list of choices, you can select “Edit Multiple” a new window will pop-up and you can past a list from a Word Document.

4. “Automatic Choices” has pre-configured scale responses (yes, No, Agree to Disagree) which are set to the number of choices you select.

There is a significant number of options, beyond the scope of this guide, that can be accomplished in the edit section.
Generate a Report

1. Click on the “Reporting Tab”
2. Select your survey
3. Click the Green “Generate New Report” Button

Give your report a name, select a folder and make sure you have selected the correct survey. You can change it in the Survey: Dropdown. When you are ready, click Create.
Select Layout: You can get basic data only all the way to graphs. Select the format that works best for your needs.

Select Question: You can determine what questions are included from your survey.

When you are ready, click: ✔️ Generate Report

---

Download Data

1. Click on the “Reporting” Tab.
2. Click on the “Download Data”

---

<table>
<thead>
<tr>
<th>Questions to Export</th>
<th>You can select what questions you want in the export file</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Ranges</td>
<td>Select a range of dates for when the survey was completed</td>
</tr>
<tr>
<td>Format decimals</td>
<td>Determine your end file needs</td>
</tr>
</tbody>
</table>

---
<table>
<thead>
<tr>
<th>Tags, Recode and Compression</th>
<th>Varies by need. Export tags and data compression (into .zip format) are the defaults.</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Format (available)</td>
<td>Select the format that works best for your needs. Download file will export in selected format.</td>
</tr>
<tr>
<td></td>
<td>• CSV (Comma Separated Value)</td>
</tr>
<tr>
<td></td>
<td>• SPSS</td>
</tr>
<tr>
<td></td>
<td>• TXT</td>
</tr>
<tr>
<td></td>
<td>• HTML</td>
</tr>
<tr>
<td></td>
<td>• XML</td>
</tr>
<tr>
<td>Schedule Download</td>
<td>SPSS Download also allows for a line width. 2000 is the default, with expansion up to 32,000 (Extra long)</td>
</tr>
<tr>
<td>Send Email</td>
<td>During peak times (business hours) large data sets can take a long time to download. You can select when you want your data to download here.</td>
</tr>
<tr>
<td>Click the large blue Button to set your download</td>
<td>Select if you want an email when your data is ready</td>
</tr>
</tbody>
</table>