



qualtrics^{XM}

How to make Surveys Using Qualtrics Workshop

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Advancing Research & Curriculum

What is Qualtrics?

- ◆ Qualtrics is an online survey tool.
- ◆ Efficient way to monitor experiences.
- ◆ Excellent way to gather information or collect documents.
- ◆ Experiences change through time so you should monitor how these may impact you.
- ◆ Available to all TAMIU Community through SSO

Go to: [tamiu.Qualtrics.com](https://tamiu.qualtrics.com)

If you do not have an account, you may have to create one using your TAMIU login

Once account is created, you should be able to login using SSO

How to sign in

tamiu.qualtrics.com

TEXAS A&M
INTERNATIONAL
UNIVERSITY

Sign in

tano.trevino

••••••••••••••••

Sign in

[Forgot Password](#)

Use of this system constitutes acknowledgement of the following:

- Unauthorized use is strictly prohibited.
- All usage is subject to security monitoring and testing.
- Misuse is subject to criminal prosecution.
- Users have no expectation of privacy except as otherwise provided by applicable privacy laws.

The university rule, Acceptable Use (20.01.03.L0.01), provides guidance for the appropriate use of Texas A&M International University information resources.

Welcome to XM

Search by name, type, view...

Recently used

Formating Protors for Conference (Spring 2022) 0 new responses

Submitting to PE Workshop (Spring 2022) 0 new responses

Submitting Papers to Conference/Publishing (Spring 2022) 0 new responses

Your workflows summary

Set up your first workflow to automate important actions and drive efficiency



This Workshop Will Cover

- ◆ How to create a survey
- ◆ How to choose what type of survey questions to use
- ◆ How to distribute your survey
- ◆ How to export your data
- ◆ Additional services provided by qualtrics

Creating a Survey

The screenshot displays the Qualtrics XM homepage. The browser address bar shows the URL `tamtu.az1.qualtrics.com/homepage/ui`. The page features a sidebar on the left with a search bar and a list of recently visited surveys, including "How to Make Surveys on...", "Graduate Writing Session...", "Post-Graduate Orientation", "Pre Graduate Orientation", and "Formatting Posters for Co...". A blue button labeled "Create a new project" is highlighted with a red border at the bottom of the sidebar. The main content area includes a "Learn Qualtrics" banner, a section for "Active surveys" with three cards showing "0 new responses" for various surveys, and a "Your workflows summary" section with a "Create a workflow" button.

XM Home | Qualtrics Experience Man x +

tamtu.az1.qualtrics.com/homepage/ui

Apps HEP Login | HEP IS AEFIS XM Home | Qualtrics Ex... Purchasing Public Relations TAMIU ARC TAMIU Institutional... Reading list

XM Home

Welcome to XM

Search by name, type, owner...

Recently visited See all projects

- Survey How to Make Surveys on ... 1 Responses Active
- Survey Graduate Writing Session ... 41 Responses Active
- Survey Post-Graduate Orientation 310 Responses Active
- Survey Pre Graduate Orientation 462 Responses Active
- Survey Formatting Posters for Co... 0 Responses Active

Learn Qualtrics through our free, self-paced courses

XM Basecamp is a great way to learn how to use Qualtrics to its fullest. You can even become certified as a Qualtrics Expert or XM Professional. [Learn more](#)

Go to Basecamp

Active surveys

- Formatting Posters for Conferences (Spring 2022) 0 new responses 0 total responses Results
- Submitting to IRB Workshop (Spring 2022) 0 new responses 0 total responses Results
- Submitting Papers to Conferences/Publishers (Spring 2022) 0 new responses 0 total responses Results

Your workflows summary

Set up your first workflow to automate important actions and drive efficiency

Create a workflow Learn more about workflows

Create a new project

Search the catalog

Type

What you're measuring

Customers

Employees

Markets

Residents

Students

[See more](#)

Department

Customer experience

Education

Human resources

IT

Market research

[See more](#)

Use case

Advertisement and creative testing

Brand tracking

Candidate experience

COVID-19

Customer experience management

Create a project









From scratch

 **Survey**

Project templates

[See all](#)

Start building with a template developed by subject-matter experts

 Qualtrics CoreXM Tour Explore the features and functions of Qualtrics	 Qualtrics Surveys Question Tour Explore standard question types	 Customer Satisfaction (CSAT) Measure how happy consumers are with your products and services	 Quick Poll Get quick feedback to help drive action
 Vote and Rank Have respondents vote on preferred options	 Product Concept Testing Capture early, real-time feedback on your product concept	 Demographic Poll Collect demographic information about your audience	 Employee Satisfaction Ask your employees what's going well and what could be improved

Project

Survey

Begin a survey from scratch or get started with a previous file.

Best used for

- Creating ad-hoc surveys

What's included

- Blank survey

Related links

[Learn how to create a survey](#)

[Get started](#)

Create a new project

Survey

Name

Untitled project

Folder

Projects and Programs

How do you want to start your survey?

Create a blank survey project

Create project

Cancel

Create a new project

Survey

Name

Untitled project

Folder

Projects and Programs

Projects and Programs

Orientation

Supplemental Instruction Survey

Workshop Questionnaires

Writing Consultant

Create a new project

Survey

Name

Untitled project

Folder

Workshop Questionnaires

How do you want to start your survey?

Create a blank survey project

Create a blank survey project

Import a QSF file

Copy a survey from an existing project

Use a survey from your library



Edit question

Question type

Multiple choice

Answer type

Allow one answer
 Allow multiple answers

Choices

Number of choices

- 3 +

[Edit multiple](#)

Use suggested choices

Format

List

Alignment

Vertical

[Add choice group](#)

Response requirements

Add requirements

Tools Saved at 11:27 AM Draft Search Preview Publish

Test ExpertReview score Great

Default Question Block

Q1 ⋮

Click to write the question text

- Click to write Choice 1
- Click to write Choice 2
- Click to write Choice 3

[Import from library](#) [+ Add new question](#)

Add Block

End of Survey

We thank you for your time spent taking this survey.

Your response has been recorded.

Builder: question properties

Question type

Question Block: units of survey

Multiple choice

Answer type

- Allow one answer
- Allow multiple answers

Choices

Number of choices

- 3 +

Edit multiple

Use suggested choices

Format

List

Alignment

Vertical

Add choice group

Response requirements

Add requirements

Results Reports

Preview Publish

ExpertReview score Great

Default Question Block

- Q1
Click to write the question text
- Click to write Choice 1
- Click to write Choice 2
- Click to write Choice 3

Import from library Add new question

Add Block

End of Survey

We thank you for your time spent taking this survey.
Your response has been recorded.

Trash 0 Questions

Empty trash

Text entry: open ended questions (you can also add images)

The screenshot shows the configuration interface for a 'Text entry' question. On the left, there are three sections: 'Question type' with a dropdown set to 'Text entry', 'Text type' with a dropdown set to 'Single line', and 'Response requirements' with two toggle switches for 'Add requirements' and 'Add validation'. The main area, titled 'Test', shows a 'Default Question Block' containing a question labeled 'Q1' with a checked checkbox. Below the label is a text input field with the placeholder text 'Click to write the question text'.

Matrix table: scale questions

The screenshot shows the configuration interface for a 'Matrix table' question. On the left, there are three sections: 'Question type' with a dropdown set to 'Matrix table', 'Matrix type' with a dropdown set to 'Likert', and 'Answer type' with a dropdown set to 'Allow one answer'. Under 'Statements', there is a control for the number of statements, currently set to 3. The main area, titled 'Test', shows a 'Default Question Block' containing a question labeled 'Q1' with an unchecked checkbox. The question text is 'Please rate your experience'. Below the text is a table with three rows of statements and five columns of response options: 'Strongly agree', 'Somewhat agree', 'Neither agree nor disagree', 'Somewhat disagree', and 'Strongly disagree'. Each cell in the table contains a radio button. In the top right corner, there is a 'ExpertReview score' indicator showing 'Great'. At the bottom right, there are two buttons: 'Import from library' and 'Add new question'.

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
I learned a lot from this workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would attend a follow up workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would recommend my colleagues to attend this workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Editing tools: these tools allow you to customize the text of the question

The screenshot shows a question editor interface. At the top left, there is a checked checkbox and two tabs: "Rich Content Editor..." (highlighted with a red box) and "Piped Text...". At the top right, there are two view options: "HTML View" and "Normal View...". The main content area contains a question label "Please rate your experience" with an "Edit Question Label" icon below it. Below the question label is a survey question with three rows of text and three radio button options for each row:

- I learned a lot from this workshop
- I would attend a follow up workshop
- I would recommend my colleagues to attend this workshop

Rich content editor: change the format, font, size, and more to improve participant experience

The screenshot shows a rich content editor interface. At the top left, there is a checkbox and the label "Q1". Below this is a formatting toolbar with the following elements: a text icon, a link icon, a "Format" dropdown menu, a "Font" dropdown menu, a "Size" dropdown menu, and icons for bold (B), italic (I), underline (U), and a "More..." dropdown menu. Below the toolbar is a text input field containing the text "Please rate your experience". At the bottom right, there are two buttons: "Import from library" and "Add new question".

Duplicate a question: copy a question if there is a similar one in your survey without having to redo

Default Question Block

Q1
Please rate your experience

	Click to write Scale Point 1	Click to write Scale Point 2
I learned a lot from this workshop	<input type="radio"/>	<input type="radio"/>
I would attend a follow up workshop	<input type="radio"/>	<input type="radio"/>
I would recommend my colleagues to attend this workshop	<input type="radio"/>	<input type="radio"/>

- Move question
- Copy**
- Replace from library
- Add page break
- Preview question
- Add note
- Delete

question

Add page break: make next question appear on a different page than the current question

Q1
Please rate your experience

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
I learned a lot from this workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would attend a follow up workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would recommend my colleagues to attend this workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

+ Add page break

Edit question name: when you export your data, it helps to identify what this question is asking by changing the name

▼ Default Question Block

Q1 💡 ⋮

Please rate your experience

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
I learned a lot from this workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would attend a follow up workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would recommend my colleagues to attend this workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q2

experience_rating 💡 ⋮

Please rate your experience

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
I learned a lot from this workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would attend a follow up workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would recommend my colleagues to attend this workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Previewing

Edit end of survey

▼ Messaging

End of survey message

Default ▼

Tools Saved at 4:44 PM Published

Preview Publish

ExpertReview score Great

Test

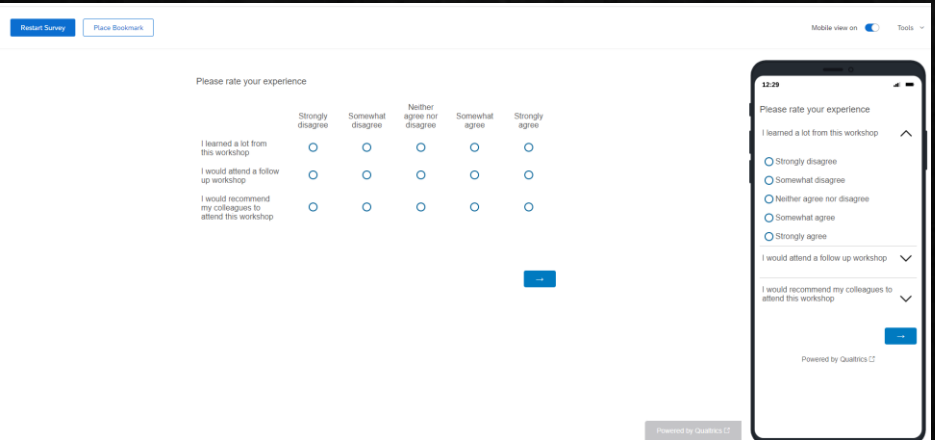
Default Question Block

experience_rating

Please rate your experience

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
I learned a lot from this workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would attend a follow up workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would recommend my colleagues to attend this workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Import from library Add new question



A new tab will open on your browser with a preview of your survey so you can make sure it is exactly how you want it.

Previewing/Publishing our Survey

The screenshot shows the Qualtrics survey editor interface. At the top, there are navigation tabs: Survey, Workflows, Distributions, Data & Analysis, Results, and Reports. Below these, there are buttons for 'Tools', 'Saved at 4:44 PM', and 'Draft'. On the right side, there are buttons for 'Preview' and 'Publish', with the 'Publish' button highlighted in red. The main content area shows a 'Test' section with a 'Default Question Block' containing a Likert scale question: 'Please rate your experience' with the text 'I learned a lot from this workshop'. The scale has five points: 'Strongly disagree', 'Somewhat disagree', 'Neither agree nor disagree', 'Somewhat agree', and 'Strongly agree'. On the left side, there is a sidebar with 'Edit question' and 'Question type' (Matrix table) and 'Matrix type' (Likert) and 'Answer type' (Allow one answer) dropdown menus. At the top right of the main content area, there is an 'ExpertReview score' indicator showing 'Great'.






The screenshot shows the 'Publish survey' dialog box. It contains the following text: 'Publishing will update the version seen by respondents. It can take up to 5 minutes to reflect changes for respondents starting new survey sessions.' Below this, there is a 'Description' section with a text input field containing 'User-published version'. To the right of the description, there is an 'ExpertReview' logo and text: 'Survey strength: Great' and 'Recommendations: 2'. Below the description, there is a 'Distribute' section with the text: 'Use an anonymous link to distribute your survey.' and a URL: 'https://tamiu.sjc1.qualtrics.com/jfe/form/SV_9uhGDOT4YtW5dWe'. There is a 'Copy link' button below the URL. At the bottom of the dialog, there are 'Cancel' and 'Publish' buttons, with the 'Publish' button highlighted in red.

Once you have published your survey, it means you are ready to distribute to your participant population. The expert review automatically checks for accessibility issues with your survey.

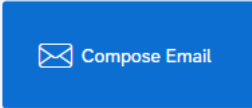
Distributing a Survey

Survey Workflows **Distributions** Data & Analysis Results Reports

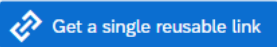
How do you want to distribute your survey?


 **Email**  Web  Social  Mobile  Online panel

Send with Qualtrics

 Compose Email

Use your own email system

 Get a single reusable link

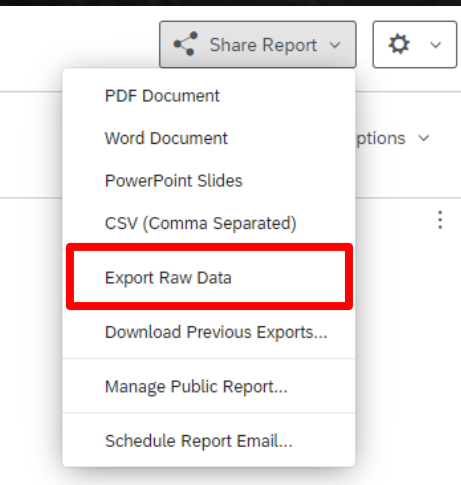
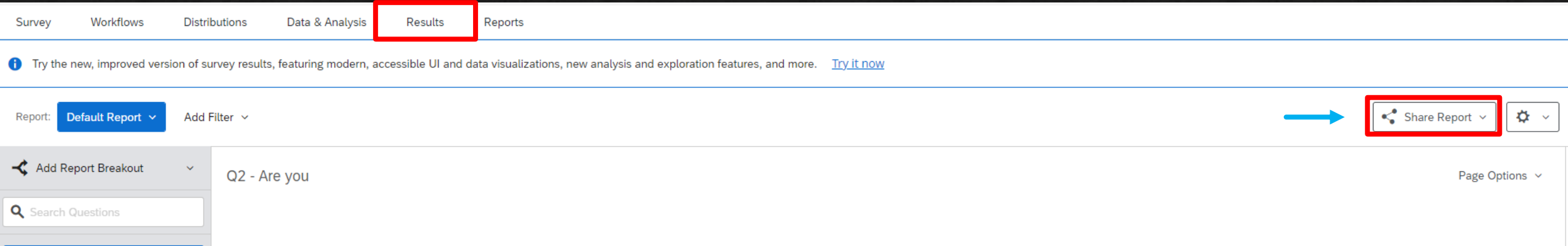
 Generate a trackable link for each contact

Choose from a variety of distribution preferences such as: anonymous link, emails, personal links, social media, offline app, QR code, and downloads



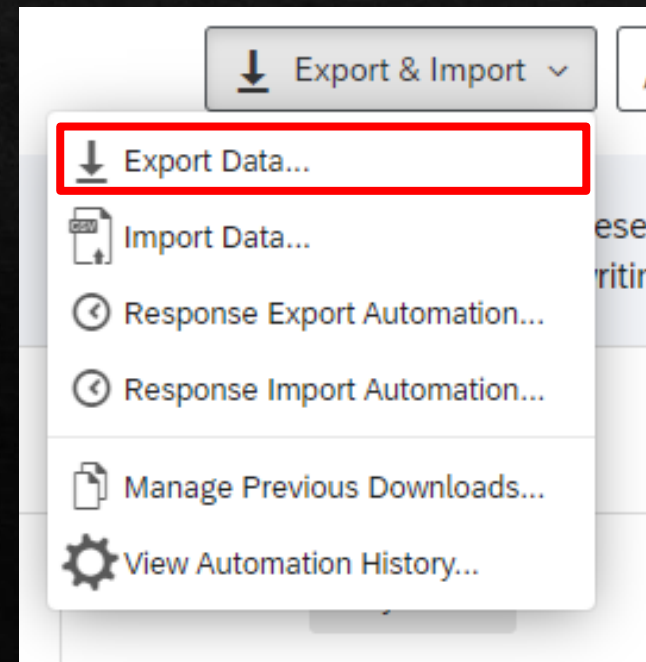
Live Demonstration

Exporting Data



Exporting Raw data will give you a spreadsheet of the data before the statistical analysis process.

To get the raw data, select export data on the next page.



Download a data table

- CSV
- TSV
- Excel
- XML
- SPSS
- Google Drive
- User-submitted files



Comma separated values

This is a .csv file that can be imported into other programs. Each value in the response is separated by a comma and each response is separated by a newline character. If your responses contain special characters and you will open this export in Microsoft Excel we recommend using the TSV export. Qualtrics CSV exports use UTF-8 encoding, which Excel will not open correctly by default.

[Learn more](#)

- Download all fields
- Use numeric values
- Use choice text

[More options](#)

Close

[Download](#)

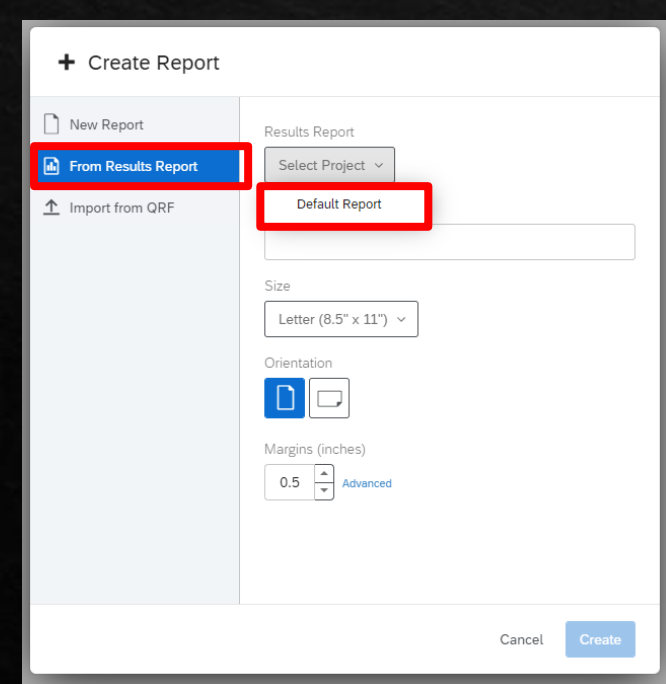
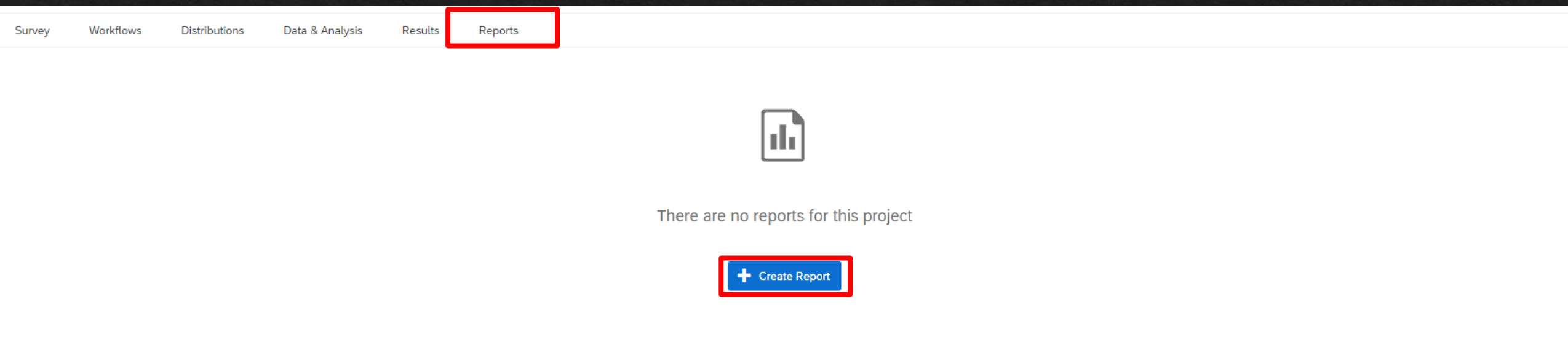
You can use any of the options available. Excel is good to use across a variety of programs but if you have a specific software like SPSS, there is specific formatting to make importing your survey easier.

Manage Downloads

Status	Type	Percent Complete	Last Updated	Delete Job
Download	Excel (Table)	100%	a few seconds ago	✕

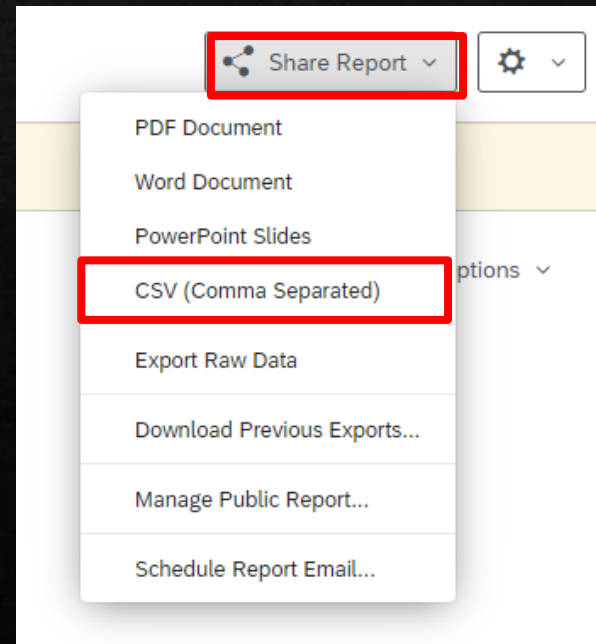
Close

An even better way to view your data offline is to generate a report so you can view the questions before you run a statistical analysis.



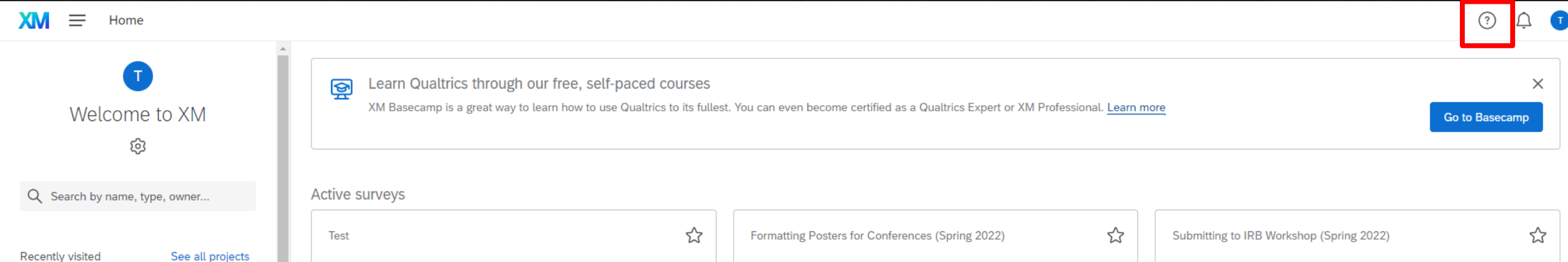
Select from Results Report and default report.

Then just create a report name and create.

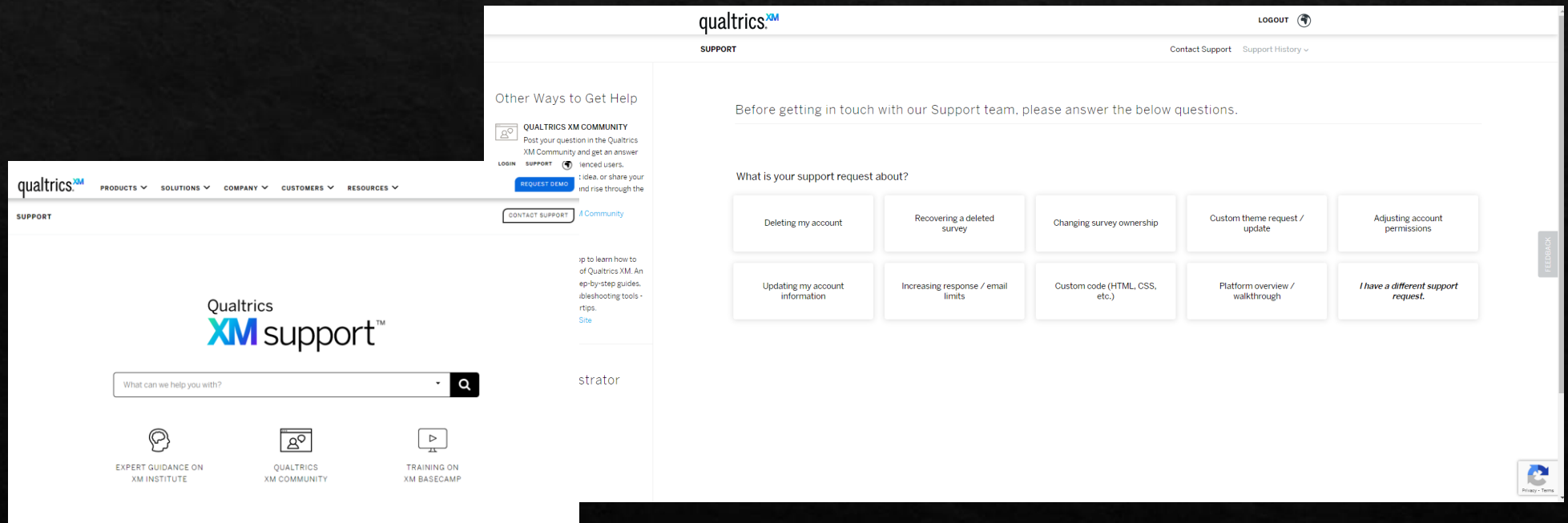
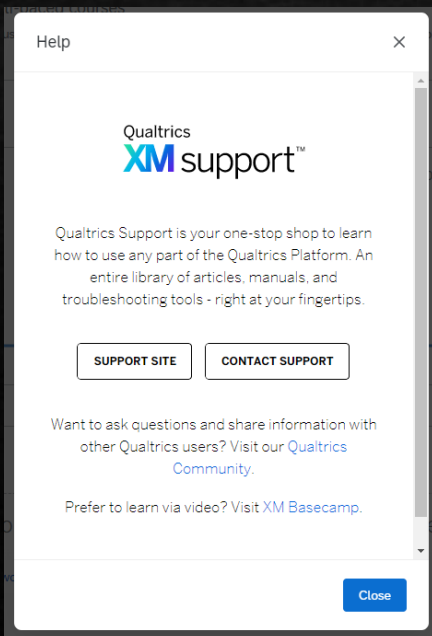


Now you can visualize your results outside of Qualtrics. You can also easily view the results of this survey online on the "results" tab.

Other resources



The help button can assist you with general questions if you are having difficulty navigating the website.





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Register for more workshops: go.tamiu.edu/arc-workshops

