

# Using Qualtrics as an Assessment Tool

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## Table of Contents

Why use Qualtrics? .....	2
Use cases of Qualtrics as an assessment tool .....	2
Qualtrics versus other platforms .....	2
Qualtrics basics .....	3
Logging in .....	3
Creating a survey from scratch .....	3
Choosing question types and options .....	5
Homepage and Projects page .....	7
Key features in Qualtrics .....	8
Designing your survey .....	9
Using display logic .....	11
Distributing surveys .....	13

Note: This guide is a work-in-progress. It is meant to provide suggestions for using Qualtrics as an assessment tool. I created it from my own experiences with using Qualtrics.

This guide does not cover good survey design but rather specifically using Qualtrics.

If you have any questions or suggestions, please email me at [sapna.naik@utsa.edu](mailto:sapna.naik@utsa.edu).

## Why use Qualtrics?

### Use cases of Qualtrics as an assessment tool

Qualtrics can be used for a variety of **surveys and evaluations**, such as the following:

- Needs surveys
- Pre- and post-tests
- Student self-assessments
- Point-of-service evaluations
- End-of-semester surveys

In addition to those, Qualtrics can be used for **a variety of other forms and surveys!**

- Requests for appointments
- Intake forms
- Student staff forms (e.g., application forms, getting to know you, notes submissions)

Qualtrics forms and surveys can also be used to gather feedback from a variety of **audiences**:

- Students (current, prospective, alumni)
- Staff members
- Faculty members
- External stakeholders

Although I have used Qualtrics for creating event registration forms and sign-ins, it's recommended to use **RowdyLink** for events to create cohesiveness across campus.

### Qualtrics versus other platforms

I am less familiar with **other platforms** for surveys and forms, although I know they are out there. Qualtrics has a benefit as it is UTSA-sanctioned and supported and is secure as log in is through Single Sign On. I would recommend against using platforms like Wufoo, as it costs extra and is outside of UTSA, or Google Forms, even though it is free because it's also outside of UTSA.

Many folks at UTSA use **Microsoft Forms**; it is part of the Microsoft Office 365 suite of programs, is supported by UTSA, and you can use it through Teams. Some find it to be more user friendly, and the reports it generates look great! I cannot speak much further to the differences or benefits of using one versus the other. Ohio University has a [guide](#) comparing Qualtrics and Microsoft Forms.

## Qualtrics basics

Creating a new survey? Get started here. This section covers logging in, creating a survey from scratch, some of the most useful question types, and your Projects page.

### Logging in

First, make sure you have an active Qualtrics account through UTSA. If you do not already have one, contact Tech Café at [techcafe@utsa.edu](mailto:techcafe@utsa.edu) or (210) 458-5555 to set up your account.

Once your account is activated, log in at <http://utsa.qualtrics.com>. I recommend bookmarking this address rather than the one it lands on, which is a single sign on page and will not work to bookmark!

Log in using your UTSA credentials (see Figure 1 below for the log in screen).

myUTSA ID

Passphrase

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Figure 1. Qualtrics log in screen

### Creating a survey from scratch

You're in! Now you can start creating a survey. Start by clicking on "Create a project" on the bottom left of your homepage, as Figure 2. You'll then get a screen, as in Figure 3, which gives you a lot of options. Select "Survey" under "From scratch." Then click the "Get started" button on the bottom right.

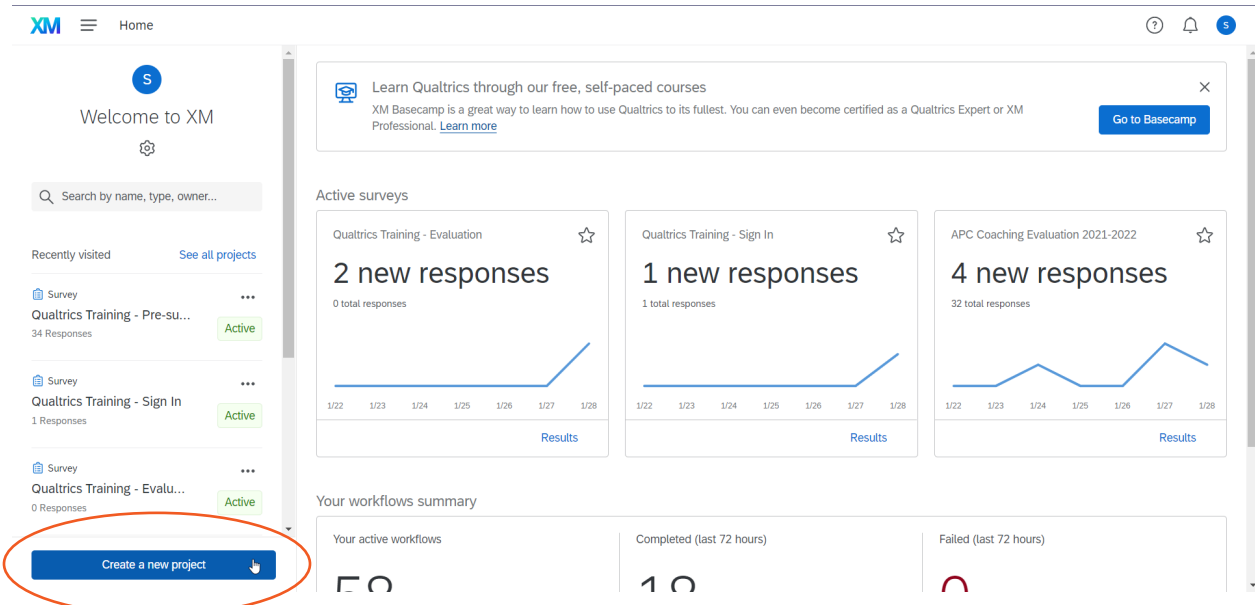


Figure 2. Qualtrics home page.

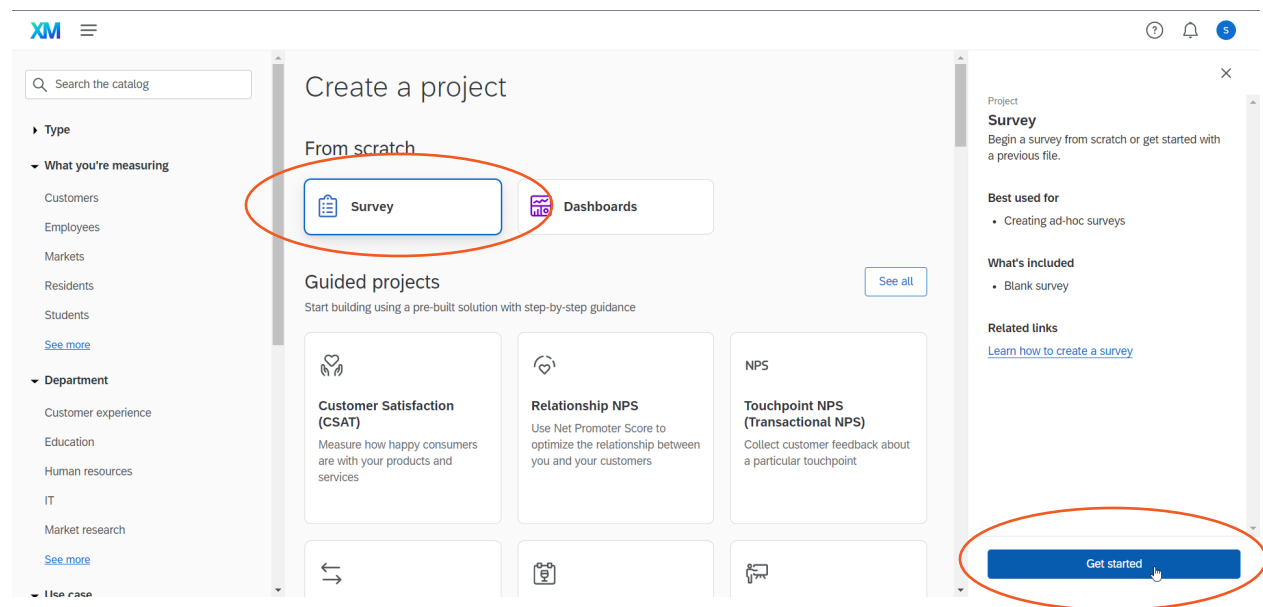


Figure 3. Create a project page.

You'll then be prompted to create a Name for your project. Name it something with enough detail so you know what it is later! For example, rather than "Student survey," name it "Spring 2022 post-appointment mentoring evaluation." You will also have an opportunity to put it in a folder. I recommend coming up with a filing system that makes sense to you. This filing system will then appear on the Project

## Choosing question types and options

You're now ready to start creating questions! Qualtrics offers lots of questions types. In this section, I will cover what I found to be most useful and common types of questions: multiple choice, text entry, matrix table, and text / graphic. I'll also cover response requirement options.

### Multiple choice

The default question type in Qualtrics is multiple choice. You can have as many choices as you'd like. Within multiple choice, you can make it "Allow one answer" which will make the choices show up as radio buttons, or "Allow multiple answers" which shows the answers with check boxes. See Figure 4 below for an example of an "Allow one answer" multiple choice question.

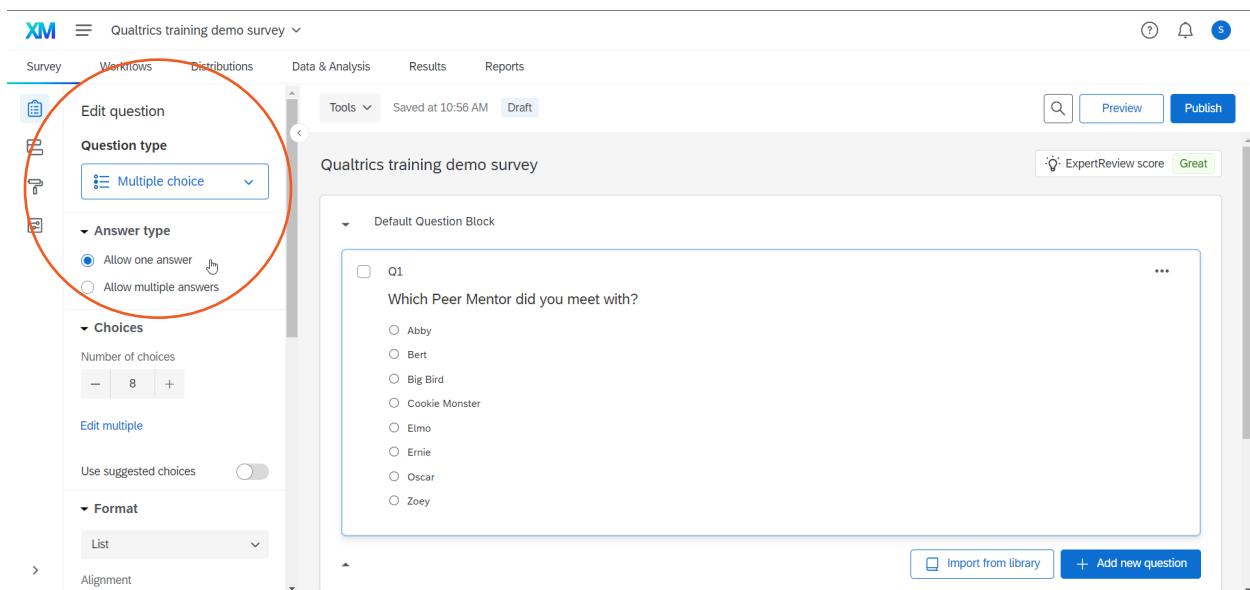
The screenshot shows the Qualtrics 'Edit question' interface. On the left, a sidebar contains the 'Edit question' section, which is circled in red. This section includes a 'Question type' dropdown set to 'Multiple choice', an 'Answer type' section with 'Allow one answer' selected (indicated by a blue dot), and a 'Choices' section with 'Number of choices' set to 8. The main area on the right displays the question 'Which Peer Mentor did you meet with?' with a list of radio button options: Abby, Bert, Big Bird, Cookie Monster, Elmo, Ernie, Oscar, and Zoey. At the bottom right, there are buttons for 'Import from library' and '+ Add new question'.

Figure 4. Multiple choice question example.

To add a new question, click the "+ Add new question" button on the bottom right.

### Text entry

Another common type is text entry, which gives users to enter anything they'd like. You have an opportunity on the left "Edit question section" to decide the length of the response (and thus the size of the text box).

## Matrix table

A third type of question is a matrix table. Matrix tables can be used for Likert scale questions, especially when you want the user to rate several statements. A common type of Likert scale question is agreement scale. You can choose the number of statements as well as the number of scale points on the left “Edit question” menu. An example is shown in Figure 5 below.

## Text / Graphic

Although not really a question type, “Text / Graphic” is included in the Question type drop down menu. This type is particularly useful for introductory statements to your survey as well as section instructions. Use them sparingly, however, to not make the user read too much!

## Options

In addition to the types of questions, you have several options that are available to you in left “Edit question” menu. While there are several, I am going to focus on “Response requirements.”

Under “**Response requirements**,” If you want to make a question required, toggle the “Add requirements” button on. Then you will get another option: Force response or Request response. With force response, a user will not be able to move on in the survey unless they answer the question. With request response, a user will be encouraged to answer a question before moving on but will not be required to do so. Note that if you have another question that is dependent on the answer, as in display logic described in a later section, make sure it is marked as “Force response”! Once “Force response” is selected, this will put a star on the top right of your question. See Figure 5 below for an example.

The screenshot shows the Qualtrics training demo survey editor. On the left, the 'Response requirements' section is expanded, showing the 'Add requirements' toggle turned on, and 'Force response' selected. The 'Question behavior' section is also visible. The main area displays a matrix table question (Q2) titled 'Rate your level of agreement on the following statements.' The table has three rows of statements and five columns of response options: 'Strongly agree', 'Somewhat agree', 'Neither agree nor disagree', 'Somewhat disagree', and 'Strongly disagree'. A star icon is visible in the top right corner of the question box, indicating that 'Force response' is selected. The 'Add requirements' toggle is also circled in red.

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
My peer mentor was courteous.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I learned something from my peer mentor.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would recommend peer mentoring to my peers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Figure 5. Matrix table with force response selected.

## Homepage and Projects page

You don't have to finish creating and editing your survey all at once! Qualtrics automatically saves your project as you're working on it. You can log out and return to it at any time.

When you log on again, you'll return to the homepage as in Figure 2. Your recently visited surveys will appear on the left side, but if you want to see all of your surveys in their folders, click "See all projects." This will take you to the Projects page, as shown in Figure 6.

From here, you can see and reorganize your surveys, "+ Create new folder" on the bottom left corner, and create a new survey using the "Create project" button on the top right. You can also see the surveys that have been shared with you using "Shared with me" in the left menu.

Using the three dots "..." on the far right of each survey, you can close an active survey, collaborate with other UTSA users, rename your project, copy your project, and move it. There are other options available from this menu as well.

If you copy a project, it will only copy the survey and associated features like Workflows, but not responses. Workflows will be turned off in the copied version. Be sure to rename the copied survey something descriptive and change internal features, like the title, before publishing!

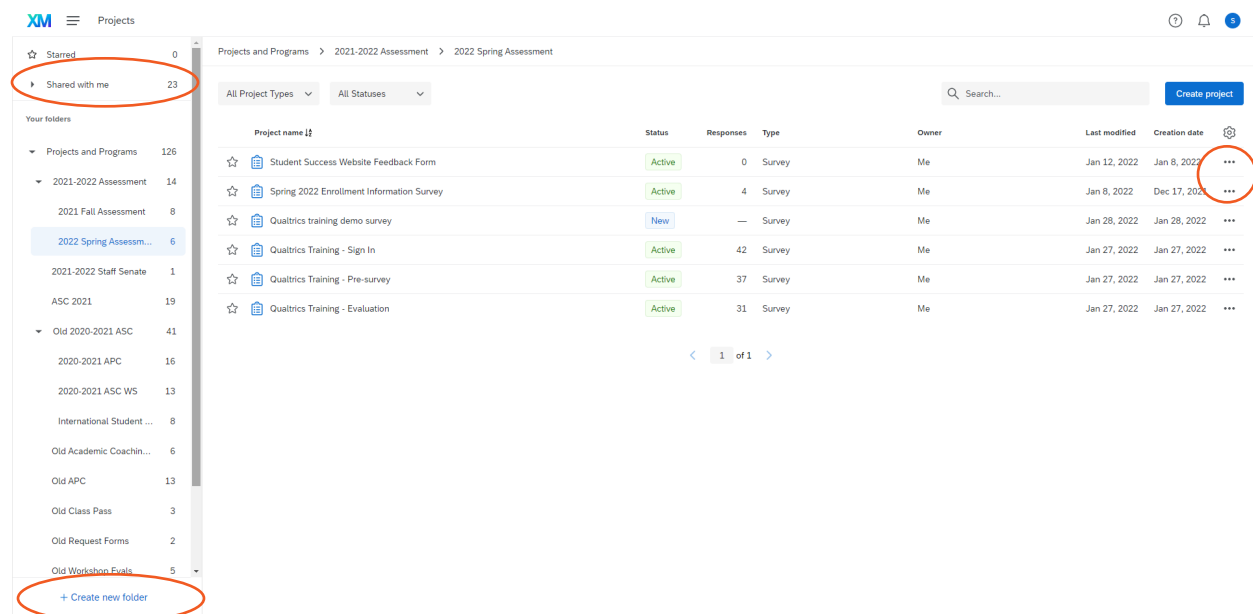


Figure 6. Qualtrics Projects page example.

## Key features in Qualtrics

This part of the guide covers what I consider to be some particularly useful features in Qualtrics, including designing your survey, using display logic, distributing surveys, sending automated emails after responses, downloading and using responses, and collaborating with others. This is of course not an exhaustive list!

**Get to know your survey home screen.** Many of the features are available from this screen. Please see Figure 7 for important buttons and their explanations below.

- A. Top menu tabs:
  - 1. Survey (default)
  - 2. Workflows
  - 3. Distributions
  - 4. Data & Analysis
  - 5. Results
  - 6. Reports
- B. Far left icons (only visible when the Survey tab is selected):
  - a. Builder (default)
  - b. Survey flow
  - c. Look and feel
  - d. Survey options
- C. Top right buttons:
  - i. Preview
  - j. Publish

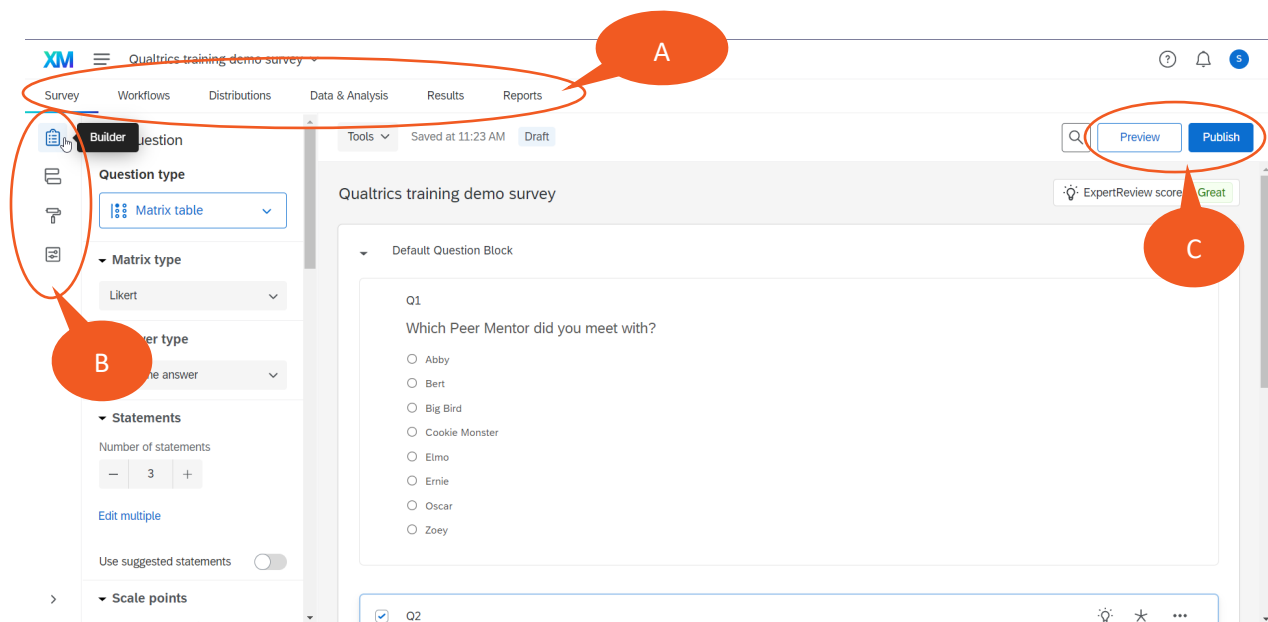


Figure 7. Survey home screen.



## Designing your survey

The default design in Qualtrics is okay, but I prefer to make the look more professional, in line with UTSA branding, and internally consistent. This section will show you some ways how to do that!

To get to the design features, click the “Look and feel” icon on the far left side of the screen.

You’ll then have several options. The ones I’ll discuss here are as follows: theme, layout, general, style, and logo. My recommendation for all of these: Go simple and easy to read.

- Theme
  - I recommend “Blank”
- Layout
  - I like “Classic” but any are fine. (Note: Simple is brand new and in the beta stages. I have not used it before!) Try to be consistent across all of your surveys for a cohesive look.
- General
  - You can choose to change the “Next Button Text” to something other than an arrow. If I have a one-page survey, I usually change the text to “Submit”
  - Scroll down to header and footer. These really add something to your survey! Without them, you will not have a title or anything at the bottom by default.
    - Header: I like to put a descriptive title for the user.
    - Footer: I like to include the office name, The University of Texas at San Antonio, email address, and website links. See Figure 8 for an example.
- Style
  - This gives you an option to change colors. By default, the Qualtrics colors are kind of boring, and I think, not very readable because of low contrast.
  - For UTSA colors, visit the official [UTSA Visual Style Guide](#).
  - I like to make the primary color UTSA orange and the secondary color UTSA blue.
  - For font, I leave it on “Default” for the layout I have chosen.
  - I also increase the contrast to “High” to make the text black rather than grey.
  - See Figure 8 below for these settings.
- Logo
  - I think it adds a nice touch to include your official UTSA office’s logo on the top of the survey. This will appear on each page. It also creates consistency across your surveys.
- Be sure to click the “Apply” button on the bottom right corner to save your Look and Feel!

A final “Look and Feel” element you can add is to change what the user sees in the browser title when they get to your survey. To do so, click the “Survey options” icon on the far left menu. There, you can change the “Display name.”

If you copy and paste your survey to create a new one, be sure to change this display name to reflect your new survey!

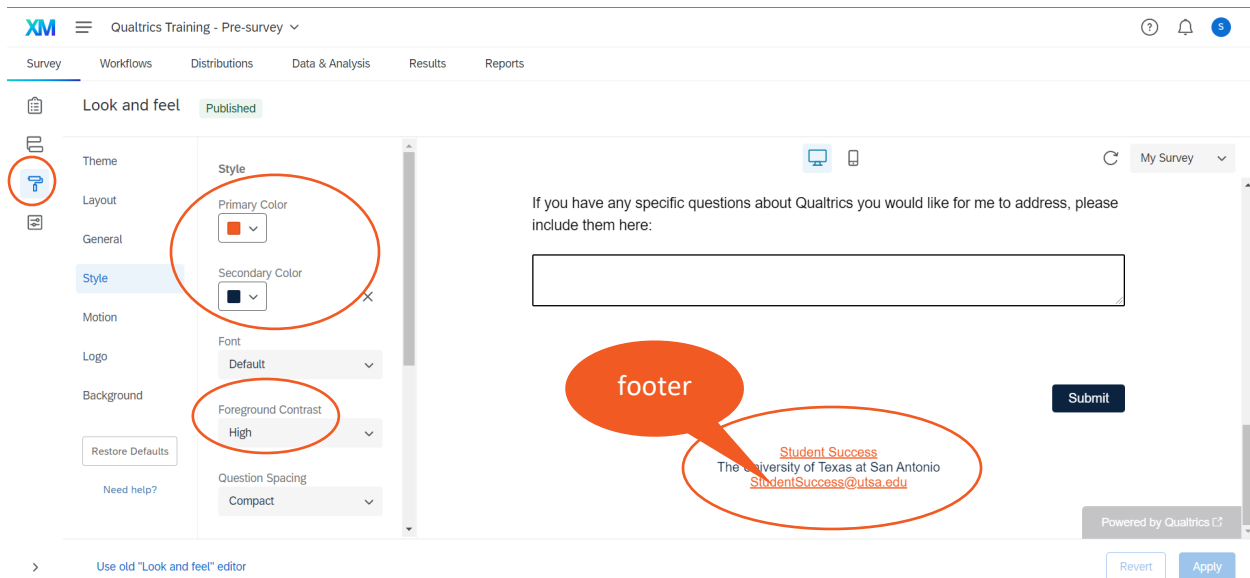


Figure 8. Look and feel options and its preview.

In addition to the Look and feel icon and its options, you can also change the way individual questions look to the user.

Return to the “Survey” (top menu) and “Builder” (first left icon), and click on an individual question. Click on the question text to edit it. Here you can add simple formatting changes, like bolding and italicizing. Once you bold or italicize, you’ll see a third option to “Remove Formatting.” See Figure 9 below.

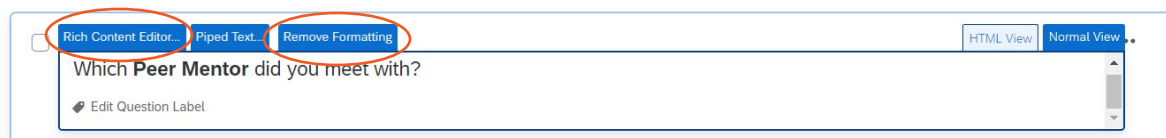


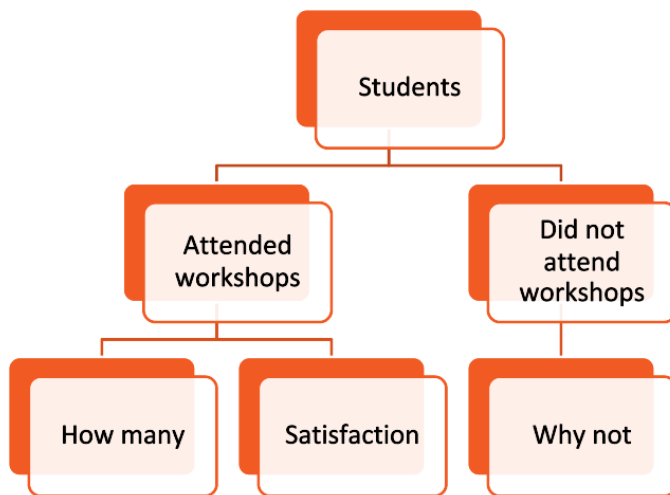
Figure 9. Editing text within a question.

If you would like to add more advanced formatting, click the first option, “Rich Content Editor...” This will open a popup where you can edit the question text, add links, change formatting, and include images. If you want to remove all of the formatting changes, click “Remove Formatting,” and it will return to normal text.

For choices within a question, hover over the choice and you will see a downward arrow. Clicking the arrow will open a menu that includes a “Rich Content Editor” and moving and removing selected choices. You can also add text entry for choices such as “Other (please specify):”

## Using display logic

**Display logic** is an incredibly useful feature in Qualtrics to show users only specific questions based on certain criteria (e.g., a question they answered previously). Display uses “if ..., then...” logic to work. For example, say you are designing a survey on workshop experience; you can build into your survey display logic so that **if** the student attended a particular workshop, **then** they will see questions related to that workshop. See the Figure 10 below for a visual of this example.



*Figure 10. Visual representation of display logic.*

Display logic is useful for making one survey that can serve multiple populations (e.g., those that attended the workshop and those that did not) rather than splitting it into separate surveys. In addition, display logic will prevent users from seeing irrelevant questions.

Another feature in Qualtrics that uses logic for questions is “skip logic,” which works slightly differently. I will not cover that feature here, but try it out!

There are two places where you can build in display logic: by question in the Builder or by block in Survey Flow.

**By question, in Builder.** If you are working on one question that you want to display based on an answer to a previous question, use the Builder to add display logic directly to a question. Click on a question, and choose “Display logic” under the “Question behavior” section on the left “Edit question” menu.

In the pop up that appears, you’ll see “Display this Question only if the following condition is met:” Choose from the drop down menu the question and the response that will trigger that question to display. In Figure 11 below, I am choosing “Q1,” choice “Big Bird” and “is Selected.” Here you can add more conditions. Then click save.

For display logic to work correctly, the question the condition requires should be “Force response.” In addition, I would recommend that the displayed question is on a separate page (if it is on the same page, it can sometimes not work correctly).

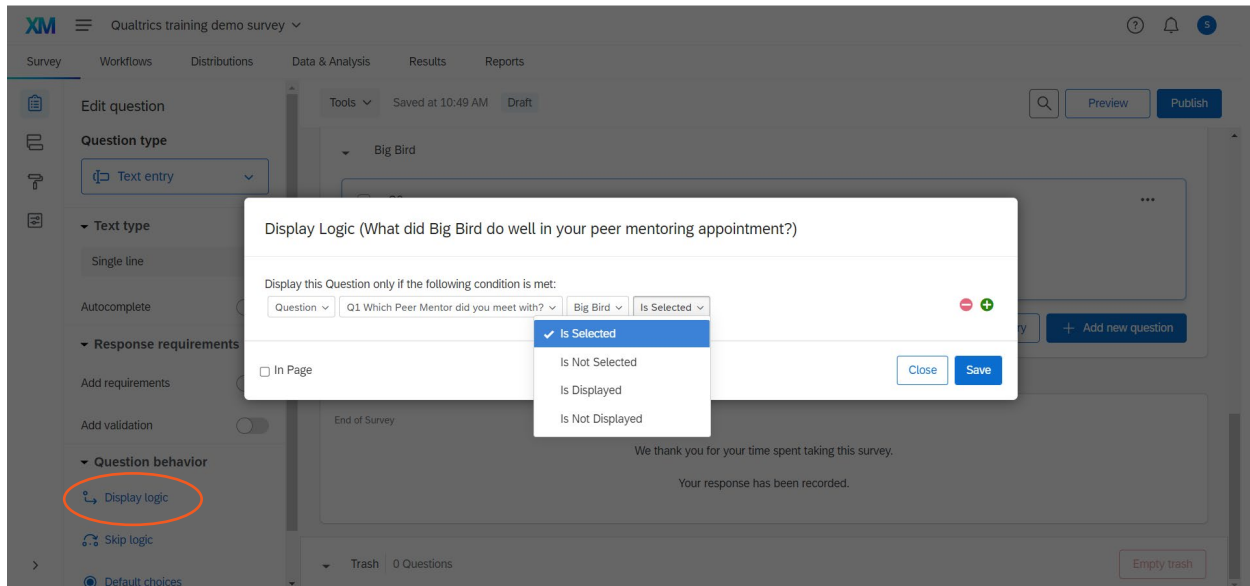


Figure 11. Using display logic for a specific question.

**By block, in Survey flow.** You can also build in display logic for whole blocks of questions rather than adding it to individual questions. To do so, make sure all of your questions are in a separate block in the Builder. I would also recommend labeling the block so it is easier to find in your survey builder. In Figure 11 above, I named the block “Big Bird” (because I want that block to appear only if the user selected Big Bird in Question 1).

Choose “Survey flow,” which is the second icon down on the left icon menu. You will then see a list of your blocks in your survey. To add display logic here, click “Add Below” on the block that contains the question included in your condition. For example, Q1 that asks about Peer Mentor is included in the first block, “Landing page.” Then click the “Branch” button as is shown in Figure 12 below.

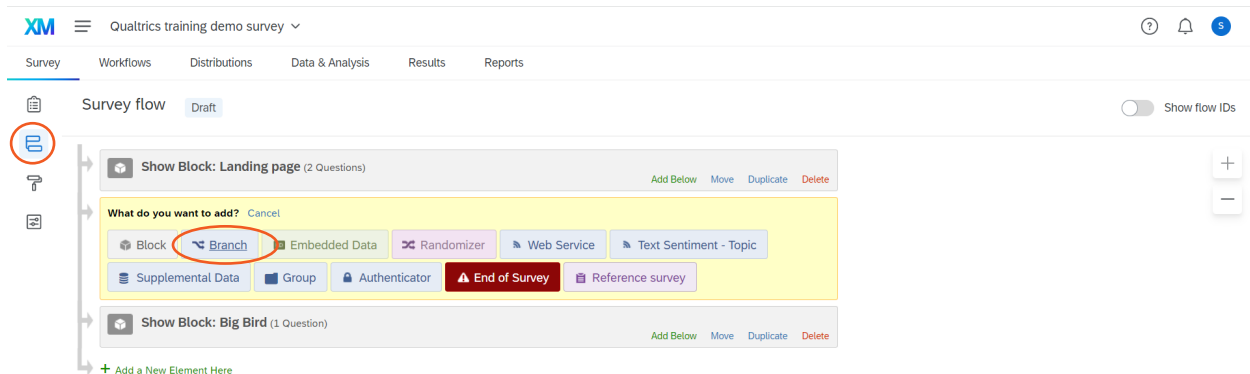


Figure 12. Using display logic for entire blocks in Survey flow.

Then, Add a Condition as you did in the example above. Then click the “OK” button.

Finally, drag the block you want to display based on that condition under the element by hovering over “Move” on the block. See Figure 13 below for what it will look like once you have dragged your block into place. To save your new display logic in Survey flow, be sure to click the Apply button.

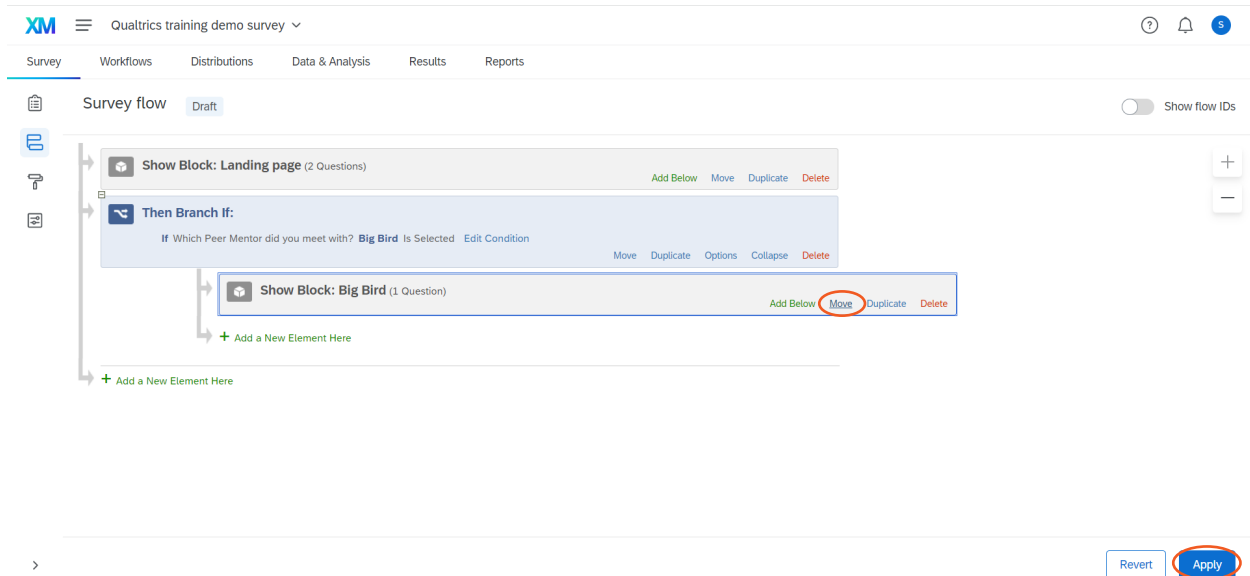


Figure 13. Example of using display logic for an entire block.

Regardless of what method of display logic you're using, I would recommend trying out the survey several times and in several combinations to make sure it works as you intended!

## Distributing surveys

There are several ways to **distribute your survey** to users to get responses. In this guide, I will be talking about three methods: Anonymous link, QR code, and Compose Email.

If you have not published your survey yet, and you click on "Distributions" in the top menu, you'll see a screen as in Figure 14 below.

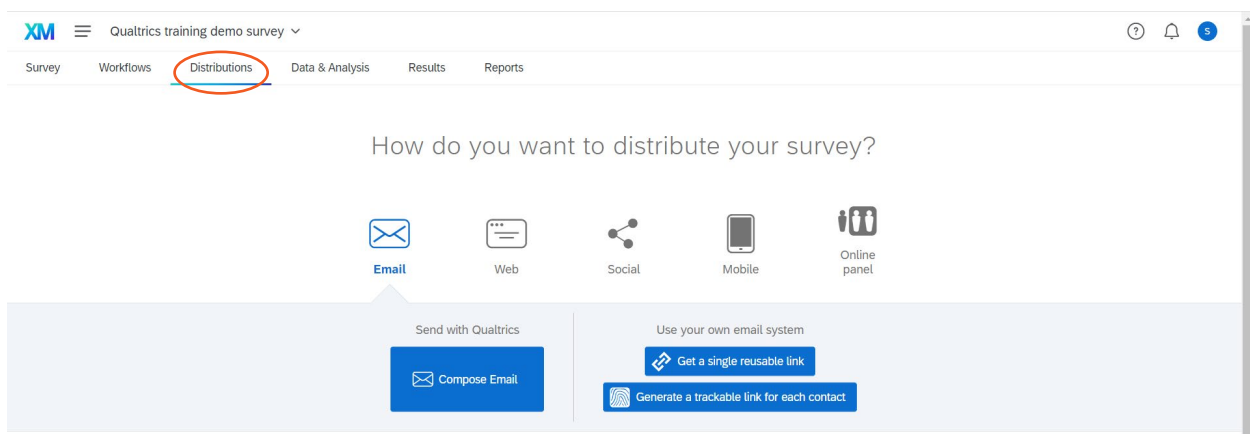


Figure 14. Distributions screen if you have not yet published your survey.

If on the other hand, you have already published your survey, you may already have your anonymous link, and you will get a screen that looks like the one in Figure 15 below.

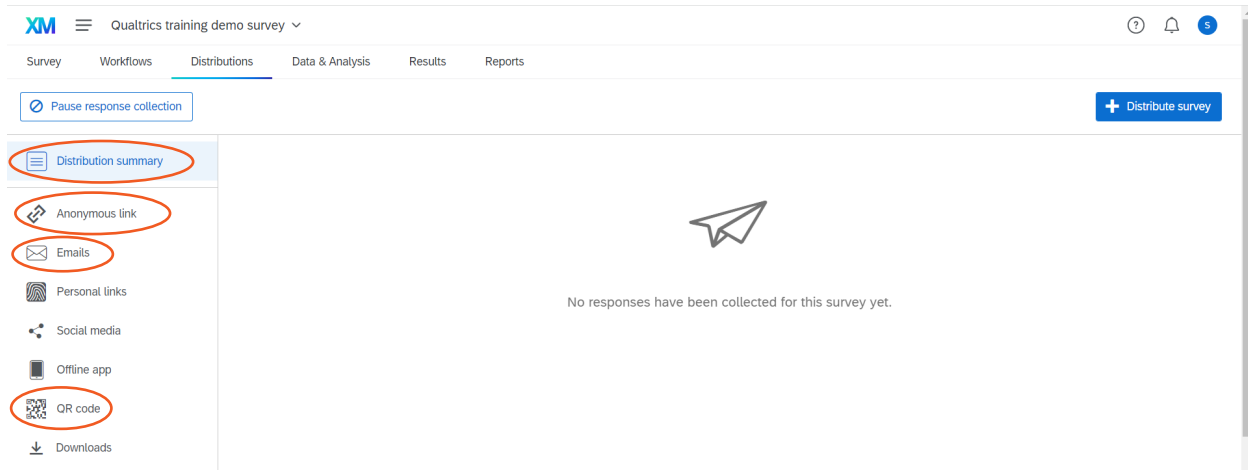


Figure 15. Distributions screen if you have already published your survey.

The distributions screen will show your distribution summary, including dates of responses, if responses have already been received. On the left menu, you can find the distribution methods.

**Anonymous link.** The simplest method of distribution is using an anonymous link. Click “Anonymous link” on the left side and copy your survey link! It’s ready to distribute via email, websites, etc. This is the same link you get the first time you publish your survey. This link does not change for the survey, even if you edit your survey afterwards. If you want a shorter link that can be typed by the user, I would recommend creating a shortened link using a service like [bitly](https://bitly.com).

**QR code.** A second easy method for distribution is to use a QR code that Qualtrics automatically generates. Get it by clicking on “QR code” in the left menu and downloading it. I recommend immediately renaming your QR code to something identifiable when saving it to your computer so it’s easier to find!

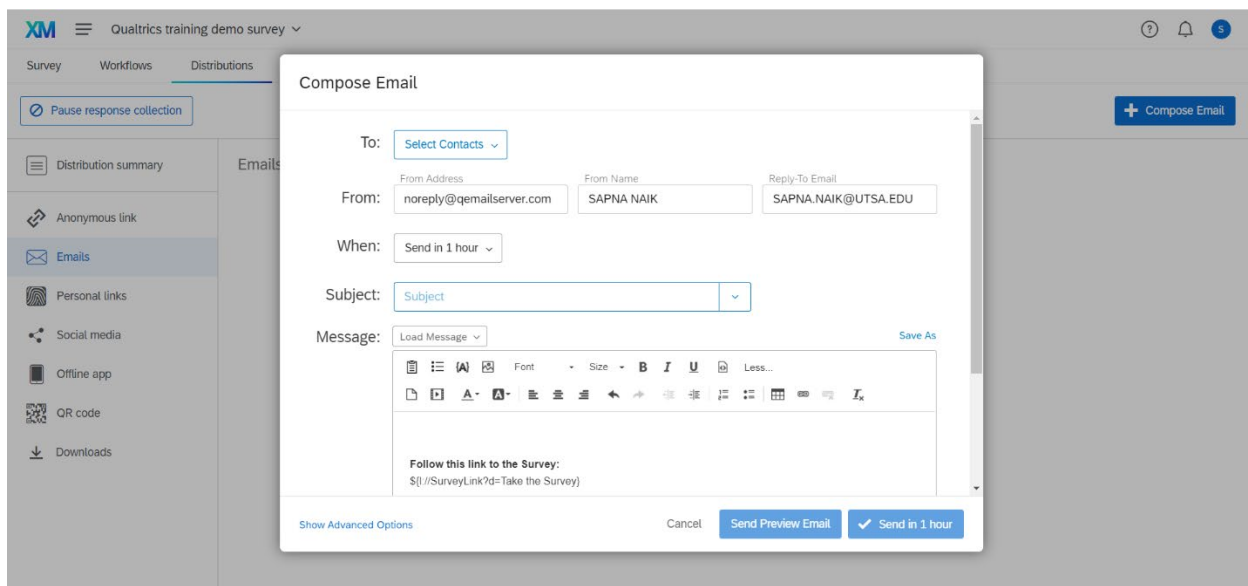


Figure 16. Compose an email to distribute your survey to specific users.

**Email.** The first two methods are anonymous; in other words, you will not be able to attach responses to particular people. Sending emails can be anonymous, but you can also connect it to users based on, at a minimum, their email address.

To create an email to distribute your survey, click “Emails” on the left menu. You’ll then get an option to compose an email using the “Compose Email” button. If you have already distributed the survey via email, you’ll see all of your previous emails on this page.

A pop up will appear where you can compose your email as in Figure 16 above.

Under the “To:” drop down menu, you can create a new contact list or use an existing one. To create a new contact list, select “New Contact” list. At a minimum, you need “Email,” but I would also recommend filling in “First Name” if you want to send personalized emails. Here you can type the emails directly into the page or copy and paste from an Excel spreadsheet. I have sent emails to up to 10,000 in one contact list before (but note, there is a limit on number of emails you can send in a given week). I would recommend naming your contact list with something identifiable like the group including in that contact list and the date.

Next, fill in the “From Address,” “From Name,” and “Reply-To Email.” For all of these, I recommend including a UTSA email address. Using a UTSA email address rather than the default “noreply@qemailserver.com” email address, will prevent the email from appearing as “External” in UTSA email inboxes. See Figure 17 below for an example.

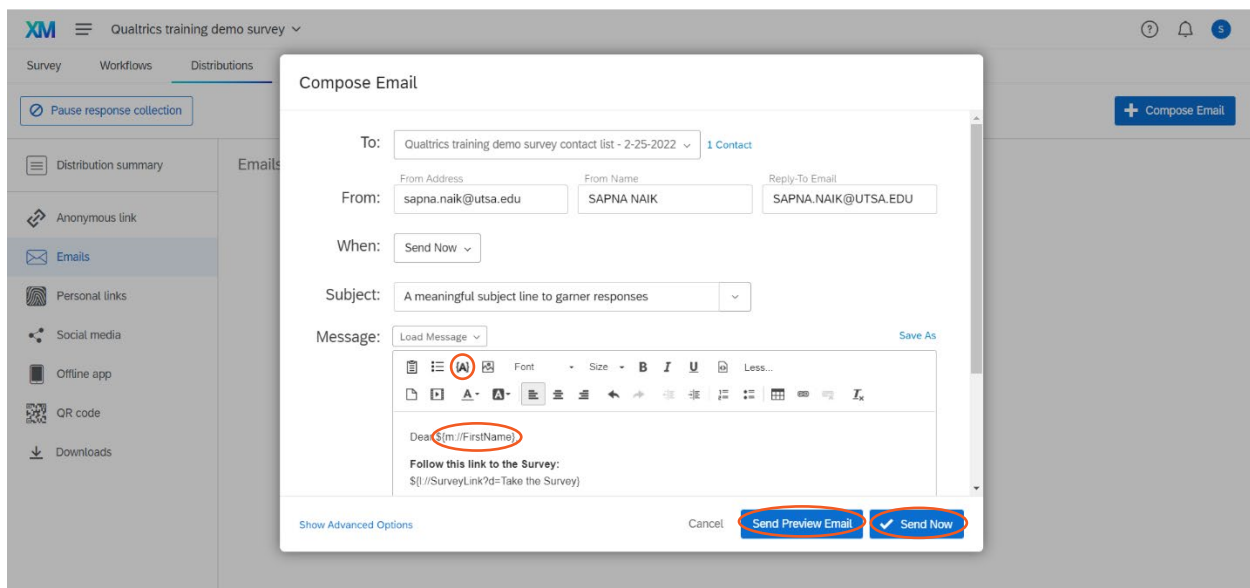


Figure 17. Example of a Compose Email screen with some sections filled in.

You have an option of when to send your email. “Send in 1 hour” is the default option, but generally, I choose “Send Now” when I want my survey to go out immediately. Please remember to test it out before sending it, however!

In your subject line, choose a meaningful subject. Then you can start to type the text of your email. In the textbox, there will be a default link to your survey as well as an opt out link. Those must remain, although you can change the wording.

You can also include a personalized greeting if you have included users' names in your contact list! To do so, click on the {A} "Piped text" button as is circled in Figure 17 above. From the menu that appears, choose "Contacts Field" and "Recipient First Name." The text \${m://FirstName} will appear in your email as in Figure 17. Once you send your email, individual names will appear in the email, which I have found seems to help survey response rates.

Before sending your email to your contact list, I recommend using the "Send Preview Email" button to send it to yourself to see what it will look like. The preview email will not include a user's name. I would also recommend sending an email using the "Send Now" button but to a test contact list rather than to the real one. This can help you make sure everything is working before sending the real one.

Once you have sent an email, you will see the "Emails" page with all of the emails you have sent, as in Figure 18 below. Click on "Show Details" on the right to get more information, including emails that have bounced and surveys started and completed. You can also click the "+" on the top left corner of the email to get more options to "Schedule reminder" and "Schedule thank you." I find "Schedule reminder" to be very useful to send a reminder email to those users who have not completed the survey already. This also seems to improve survey response rates!

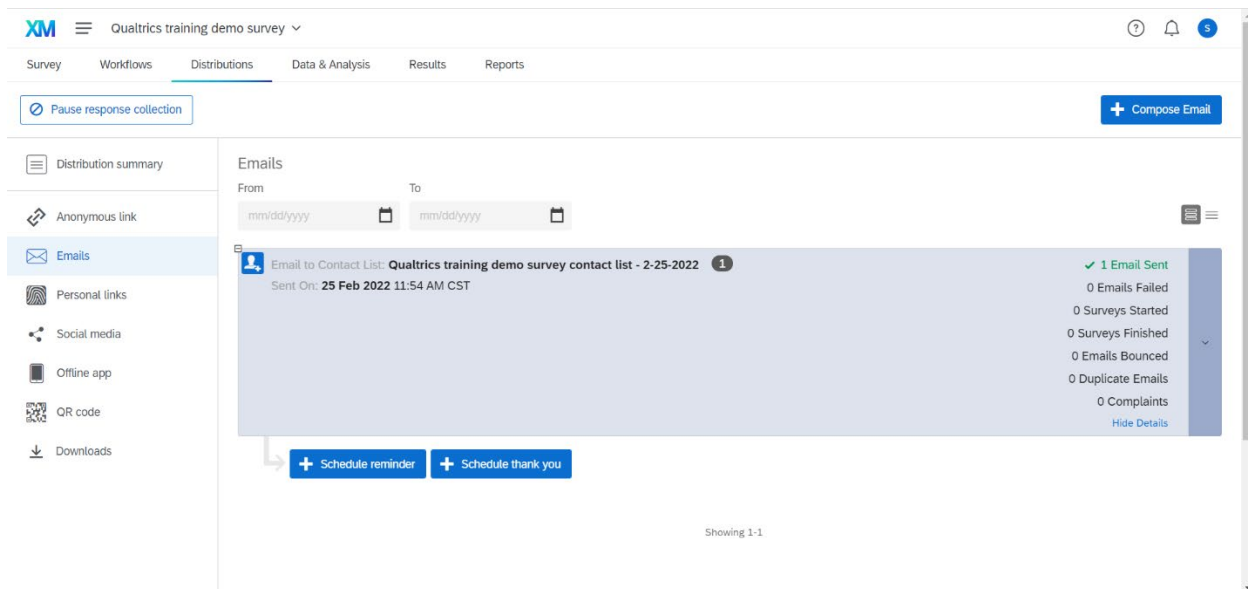


Figure 18. Example of the Emails screen once you have distributed a survey via email and its options.