**Getting started with Qualtrics**

Qualtrics is a powerful tool for creating online questionnaires and surveys. It allows for a vast range of question types, embedded data, display logic, and survey flow manipulation. If you're a beginner and looking to create your first questionnaire, here are some step-by-step instructions:

**Step 1: Sign Up and Log In**

If your organization doesn't already provide access to Qualtrics, you'll need to sign up for an account. Visit the Qualtrics website, sign up, and log in to your account.

**Step 2: Create a New Project**

Click on the "Projects" button on the top bar.

In the top right corner of the new page, click the green "+ Create Project" button.

Select "Survey" as the project type, then choose a name for your project and click "Get Started".

**Step 3: Build Your Survey**

Click on the "Create a new question" button. Here, you'll be able to input your question text and select the question type. Qualtrics provides many different types of questions, including multiple choice, text entry, matrix table, etc. After typing your question, select the appropriate type from the drop-down list. Then click on the "Done" button to save the question.

**Step 4: Customize Question Settings**

If you want to customize your questions further, click on the question you'd just created. Here you can:

* Add display logic: This allows the question to be displayed only under certain conditions.
* Add skip logic: This sends respondents to different parts of the survey based on their responses.
* Force response: This makes a question mandatory to answer before moving forward.
* Remember to hit "Done" to save any changes.

**Step 5: Add More Questions**

Repeat steps 3 and 4 until you've added all your desired questions.

**Step 6: Survey Flow and Logic**

Once your questions are set, click on the "Survey Flow" button on the top bar. This section lets you determine how your respondents move through your survey.

**Step 7: Look and Feel**

Click on the "Look & Feel" button on the top bar. Here you can customize the appearance of your survey, including colour scheme, font, question spacing, etc.

**Step 8: Distribute Your Survey**

Once you're happy with the survey, click on the "Distribute Survey" button on the top bar. You can choose various options to distribute your survey, such as sending out emails, creating a link to the survey, posting it on social media, etc.

**Step 9: Analyse Results**

After distribution, you can start collecting responses. Qualtrics provides a "Data & Analysis" tab where you can view responses in real time, create graphs, export data, and more.

**Types of questions**

Qualtrics offers a broad range of question types that you can use. Here are some examples:

**1. Multiple Choice**

These are classic questions where respondents select one (or more) answers from a list of options. This could be a yes/no question, a Likert scale question (rate 1-5), etc.

Example: "How often do you exercise?" with options such as "Every day", "Once a week", "Once a month", or "Never".

**2. Text Entry**

This type of question allows the respondent to write free-form text as their answer. This could be a single line of text or a larger text box for longer responses.

Example: "Please describe any allergies you have".

**3. Slider**

The slider question type provides a sliding scale that respondents can drag to represent their answer. It can be useful for gauging sentiments or subjective experiences that fall on a continuum.

Example: "On a scale of 0 (not satisfied) to 100 (very satisfied), how satisfied are you with our customer service?"

**4. Rank Order**

With rank order questions, respondents rank a series of items or choices in order of preference.

Example: "Rank the following fruits based on your preference, where 1 is your most preferred fruit: Apples, Oranges, Bananas, Grapes, Berries".

**5. Matrix Table**

Matrix questions are essentially a series of multiple-choice questions presented in a table format. They are useful when you need to ask several questions that should be rated on the same scale.

Example: "Please rate the following aspects of our service on a scale of 1 (Poor) to 5 (Excellent): Responsiveness, Quality, Value for money, Communication".

**6. Constant Sum**

These questions require respondents to distribute a certain number of points, percentages, or other units among a set of items. This can be used to gauge relative preferences or importance.

Example: "Allocate 100 points between the following activities based on how you spend your time in a typical day: Sleeping, Working, Eating, Exercise, Leisure activities".

**7. Graphic Slider**

This question type is similar to the standard slider but allows for a more visual representation, such as a thermometer, a speedometer, or a face that changes expression.

Example: "On a thermometer scale from 0 (coldest) to 100 (hottest), how would you rate the temperature in your office today?"

**8. Drill Down**

This type of question is used when you have a lot of answer options. It groups answers into categories and subcategories to make it easier for respondents to find and select their answer.

Example: If asking for a respondent's home location, a drill down question could first have them select their country, then their state/province, and then their city.

These are just a few of the question types offered by Qualtrics. There are also more advanced options. Your choice of question type should be guided by what data you need to collect and what will be easiest for your respondents.

**Customize Question Settings**

Customizing question settings is an important aspect of creating a survey in Qualtrics. This functionality allows you to create dynamic, adaptive surveys that suit the needs of your research. Here is a more detailed instruction:

**1. Add Display Logic**

Display logic allows you to set conditions for when certain questions should be shown. This can make the questionnaire more tailored and relevant to individual respondents.

To set display logic:

Click on the question you want to add logic to.

Click on the blue "Display Logic" button in the question editing menu.

In the dropdown that appears, you can set the conditions for when this question should appear. For example, if you had a previous question that asked if the participant had a pet, you could set the display logic for the next question, "What is the name of your pet?", to only show if the answer to the previous question was "Yes".

**2. Add Skip Logic**

Skip logic allows you to direct respondents to different parts of the survey based on their answer to a certain question. This can help avoid showing irrelevant questions to participants.

To set skip logic:

Click on the question you want to add skip logic to.

Click on the blue "Skip Logic" button in the question editing menu.

Here you can set the conditions for the question and where to direct the respondent. For example, if a question asks about an experience that only certain participants would have had, those who answer "No" can be skipped past the detailed questions about this experience.

**3. Force Response**

Forcing a response can be helpful for ensuring that critical data is not missed. However, use this feature sparingly as it can cause frustration if overused.

To set a forced response:

Click on the question you want to force a response to.

Click on the blue "Force Response" button in the question editing menu. Now, participants won't be able to proceed with the survey without answering this question.

**4. Add Question Validation**

Question validation ensures that the responses to a certain question meet specific criteria. This can be useful for questions that require a certain format of answer, such as a specific number range or an email address.

To set question validation:

Click on the question you want to add validation to.

Click on the blue "Validation" button in the question editing menu.

Here you can choose the validation type. For example, you might select "Email format" for an email question, or "Force Whole Number" for a question where you want the answer to be a whole number.

Remember to click "Done" after editing each question to save your changes. The "Preview" button at the top of the page is also handy for checking how your survey will appear to respondents.

**How to download data**

Follow this step-by-step guide to download your survey data from Qualtrics:

**Step 1: Accessing the Data**

Log in to your Qualtrics account and go to the "Projects" page.

Click on the project (survey) for which you want to download data.

**Step 2: Navigating to the Download Data Page**

Click on the "Data & Analysis" tab at the top of your project screen.

Then click on "Export & Import", which is located in the upper-right of the Data & Analysis page.

From the drop-down menu, select "Export Data".

**Step 3: Choosing the Data Format**

A new window will open, where you'll choose the format for your data file. Qualtrics supports several formats like CSV, TSV, SPSS, etc.

After selecting the format, you can choose whether you want all data or a filtered subset of the data, and whether you want responses that are completed, incomplete, or both.

**Step 4: Customizing the Data Export**

There are several other options to customize your export. For example, you can choose to include/exclude survey metadata, recode seen but unanswered questions, etc. Spend some time to familiarize yourself with these options and choose the ones that best suit your needs.

**Step 5: Downloading the Data**

Click the "Download" button to start the process. The data file will be generated, which could take a few minutes depending on the size of your data.

Once the file is ready, a "Download" button will appear. Click it, and the file will be downloaded to your computer.