

## My Surveys Tab

- **Managing Folders** – Create new folders and organize surveys. Great option if creating a lot of surveys.
- **Sharing** – Share surveys with other Qualtrics users. Give them certain permissions (i.e. you may allow them to edit, distribute, copy, etc. the shared survey, or only view it without editing). You must know the user name in order to share with someone outside of your brand. Optimal for survey collaboration.
- **Message center** – Send messages to other Qualtrics users. You will receive quarterly messages from Qualtrics informing you of updates to the software.

## Notes

## Create Survey Tab

- **Quick Survey Builder** – The most frequently used option. A very intuitive and user-friendly interface.
- **Survey Library** - Use the survey library to scan through over 200 prebuilt surveys, from which you can copy questions into your own surveys and edit them as you please. These surveys have been created by other Qualtrics users, marketing professors, and our Qualtrics research and development team. Very useful if you are looking for effective questions. You may also copy questions from previous surveys you've created.
- **Survey Wizard** – This is the older Qualtrics interface.

## Edit Survey Tab

- Select the green + sign to create a new question.
- Use the green “change question type” drop down menu to select a question type. From this menu, you can also select “show all question types” to see an example of all possible question variations.
- **Text piping** – Pull text from a choice in a previous survey question into another question. Perfect for follow up questions (i.e. question 1 “What is your favorite color?” If blue is selected, the next question will read “Why is blue your favorite color?”). Select the purple drop down menu to the left of your question. Go to more advanced options. Inside of the rich text editor, select the **{a}**, and decide where you would like to pipe text from.
- **Insert an image or video** – Select the purple drop down menu and click on “insert image.” Images can be inserted into a question or a question choice.

- **Randomize question choices** – Select the purple drop down menu. Click on “randomization.”
- **Randomize questions within a block** – Select “block options” at the top right of the question block. Choose “advanced randomization.”
- **Skip logic** – Use skip logic to tailor your survey to the respondents by skipping them over questions that may not apply to them. Select the question you wish to skip from, then select “add skip logic” from the purple drop down menu to the left of your question. Choose the question you wish to skip the respondent to.

### Look & Feel Icon

- Change the background of your survey – Select “look and feel” in the gray bar at the top of your screen. Choose the desired background.
- Add header or footer.
- Add a progress bar.

### Survey Options

- Insert a “back” button.
- Save and continue option.
- Password protect your survey.
- Prevent people from taking the survey more than once by selecting “prevent ballot box stuffing.”
- Specify when you would like partially completed surveys to be recorded in the survey results.

### Survey Flow

- Organize the order of block presentation.
  
- Insert a block randomizer, which randomizes the presentation of question blocks (groups).
  
- Add a branch – similar to a separate survey within your survey.

### Preview Survey Icon

- Preview Survey – the magnifying glass icon at the top of your screen. This allows you to view your survey as the respondent would see it.

### Advanced Options Drop-down Menu

- Select advanced survey elements and you can do one of the following things:
  - 1) Set up a quota for your survey.
  
  - 2) Set up survey triggers.
  
  - 3) Perform conjoint analysis.

## **Distribute Survey Tab**

### Survey Link and Send Survey Icons

- Three ways to send your survey:
  - 1) Select the “survey link” icon. Copy and paste the link into an email and send it out to your respondents.
  
  - 2) Select the “send survey” icon. Use the “Quick send” function. Enter names and email addresses of your respondents. Create a message you would like to have appear in your email. This is a good option if you are only sending your survey to a few people. It creates a unique link for each respondent, which deactivates when they finish the survey, so they are only able to take the survey once.
  
  - 3) “Survey Mailer” – This is used most often. After uploading a distribution list (panel) into the Qualtrics library, you can send a survey to the entire list. You can track each person’s responses individually. Best if sending to a large group of people.

### Mail History Icon

- Mail History – Check the status of your emails and find out which ones failed.
- Send reminder and thank-you emails – Under “mail history” select the “actions” drop down menu, and then select “send reminder or thank you.”

### Popup Survey and Embedded Survey Icons

- Popup survey – embed your survey onto a website. It will pop up to anyone who visits your site.
- Embedded survey – Embed the survey link on your website or blog.

## **View Results Tab**

### View Reports Icon

- **Add graphs and tables** – Add a graph or table to your question by selecting the “add graph” or “add table” icon. You can add a basic statistics table by going to the “more” menu and selecting “add statistics table.”
- **Export** to Word, PowerPoint, or Excel – Next to the “export report” option, select the program’s icon to which you would like to export your graphs and tables. You can export individual tables or graphs by hovering your cursor over the graph and selecting the drop down menu at the top left of the graph.
- **Show your results** to anyone you want, as they update in real time. Select “public report,” then “turn on public report.” Copy and paste the link and send it to anyone you want.
- **Create a new report** by clicking on the “new report”
- **Create a subgroup** – by clicking on the hyper-texted question choice you wish to filter by.
- **“Drill Down”** – allows you to view the respondents’ results based on how they answered other questions in the survey.

### Edit Results Icon

- View results of individual respondents by clicking on their response ID.
- Select “more” in the top right of your screen to see information such as drop out rates, what time of day respondents took the survey, how long it took them to take it, etc.

### Cross Tabulation

- Generate a cross tabulation table.

### Download Data Icon

- Download raw data straight into Excel, SPSS, XML, or HTML for further analysis.

### **Polls Tab**

- Create a basic poll to put on your website.

### **Library Tab**

- Four different libraries:

#### **1) Survey Template Library**

- a. Find prebuilt surveys and copy and edit them in your own account.
- b. Copy your survey into a group library for others in your brand to use.

#### **2) Question Library**

- a. Find good prebuilt questions to use in your survey.

#### **3) Graphics Library**

- a. Upload images that you have saved on your computer into this library and use them in your survey.

#### **4) Message Library**

- a. Build invitations, reminder and thank you messages, end of survey, and inactive messages. Save them here so you can reuse them in the future.

## Panels Tab

- Upload a panel (distribution list) into Qualtrics. You can send a survey to each individual in your panel by using the Survey Mailer (SEE “Distribute Survey Tab.”)
  1. Create a Panel using Excel and save it as a .csv file.
  2. Select “Create New Panel”
  3. Once you’ve named the Panel, select “import/update panel members.” This will allow you to upload the panel from excel into Qualtrics.
  4. Follow the upload instructions, then send your survey to the panel using the Survey Mailer.

**\*For helps and tutorials, visit [http://www.qualtrics.com/wiki/index.php/Qualtrics\\_Helps](http://www.qualtrics.com/wiki/index.php/Qualtrics_Helps)**