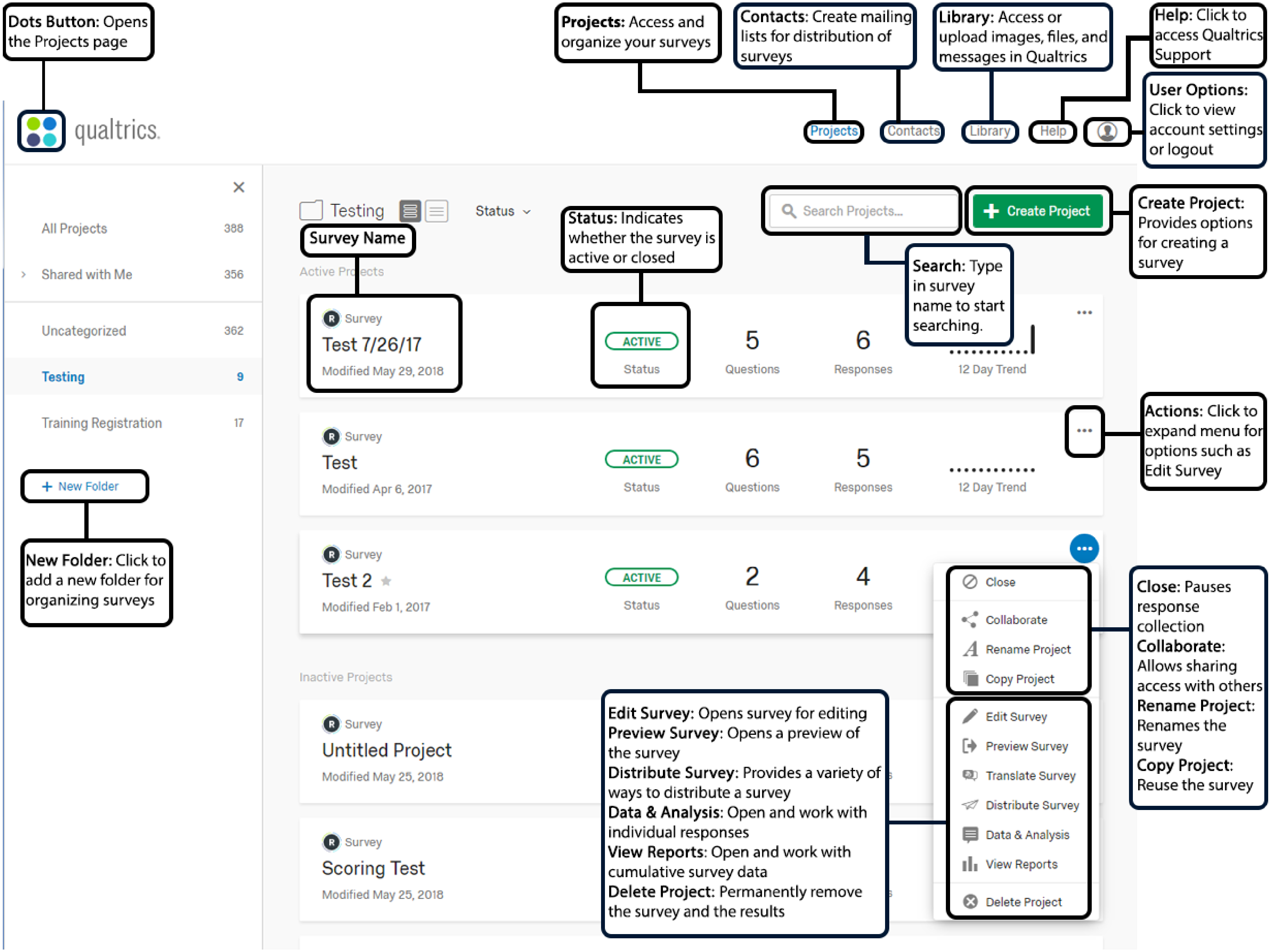


Dots Button: Opens the Projects page
Projects: Access and organize your surveys
Contacts: Create mailing lists for distribution of surveys
Library: Access or upload images, files, and messages in Qualtrics
Help: Click to access Qualtrics Support
User Options: Click to view account settings or logout
qualtrics
Projects
Contacts
Library
Help
All Projects 388
Shared with Me 356
Uncategorized 362
Testing 9
Training Registration 17
New Folder
New Folder: Click to add a new folder for organizing surveys
Testing
Status
Survey Name
Status: Indicates whether the survey is active or closed
Search Projects...
Create Project
Create Project: Provides options for creating a survey
Search: Type in survey name to start searching.
Active Projects
Survey
Test 7/26/17
Modified May 29, 2018
ACTIVE
Status
5
Questions
6
Responses
12 Day Trend
Survey
Test
Modified Apr 6, 2017
ACTIVE
Status
6
Questions
5
Responses
12 Day Trend
Actions: Click to expand menu for options such as Edit Survey
Survey
Test 2
Modified Feb 1, 2017
ACTIVE
Status
2
Questions
4
Responses
Close
Collaborate
Rename Project
Copy Project
Edit Survey
Preview Survey
Translate Survey
Distribute Survey
Data & Analysis
View Reports
Delete Project
Close: Pauses response collection
Collaborate: Allows sharing access with others
Rename Project: Renames the survey
Copy Project: Reuse the survey
Inactive Projects
Survey
Untitled Project
Modified May 25, 2018
Survey
Scoring Test
Modified May 25, 2018
Edit Survey: Opens survey for editing
Preview Survey: Opens a preview of the survey
Distribute Survey: Provides a variety of ways to distribute a survey
Data & Analysis: Open and work with individual responses
View Reports: Open and work with cumulative survey data
Delete Project: Permanently remove the survey and the results

Qualtrics Basics

Creating a New Qualtrics Account

Note: Anyone with a Purdue career account can create a Qualtrics account.

1. In a Web browser, navigate to purdue.qualtrics.com.
2. Enter your Purdue Career Account username and password and click **Login**
3. In the page that opens under "This seems to be the first time you are logging in to Qualtrics," select **I don't have a Qualtrics account**
4. In the page that opens, select **I agree** to accept the Terms of Service

Creating a Project

Note: Project is the new term for surveys created in Qualtrics

1. On the **Projects** page, click **Create Project**
    a. **Note:** If you wish to place the Project in a specific folder, select the folder before clicking **Create Project**
2. In the window that pops up, select either **Blank Survey Project** on the **Research Core** tab and enter a Project Name or…
3. Select **Create From Existing** to create a project **From a Copy, From a Library,** or **From a File**
    a. **Note:** The file type to create from a file is an exported **.qsf** file, which stands for **Qualtrics Survey Format**
4. Click Create Project

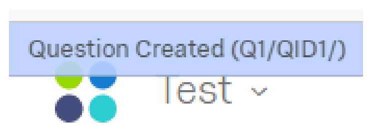
My Tasks

Note: My Tasks is a new feature in Qualtrics that helps you keep track of the steps in collecting survey responses with Qualtrics. Click on the different tasks in order to find links to the help page for the task.

Note: If you close out of the My Tasks list, click on this icon at the right of the page in order to open it again: 

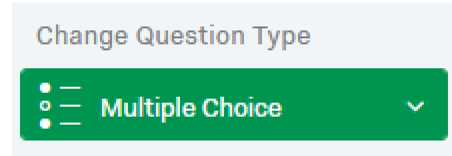
Creating & Arranging Questions

Note: Any changes you make to a survey are automatically saved and can be tracked by the blue flashes of text in the upper left of the screen as pictured below.

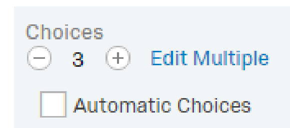


Creating/Adding Questions

1. Open the project
2. Click **Create a New Item.**
    a. The default question type is **Multiple Choice**.
3. If desired, under **Change Item Type** on the right, click the drop-down menu and click the desired type to change the question type.



4. Write the question text in the proper field
5. If needed, type the choices for the question in the proper fields.
6. If desired, click the **–** or **+** buttons under **Choices** on the right panel to add or delete choices.

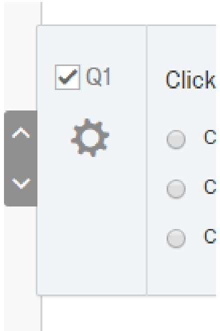


    a. **Note:** Checking the box for Automatic Choices brings up options for choices that best match the question type such as a five point Likert scale for a matrix table question.

Moving Questions

1. Open the desired project
2. Place the cursor over the desired question

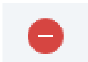
   a. An icon with arrows will appear on the left.



3. Click the down arrow to move a question down
   a. Or click the up arrow to move a question up

Deleting Questions

1. Open the desired project
2. Place the cursor over a question
   a. The **Remove Question** icon appears on the right

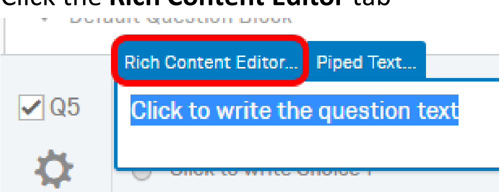


3. Click the **Remove Question** icon

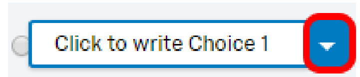
Editing Questions

Rich Content Editor

1. Open the desired project
2. Click the desired question text
3. Click the **Rich Content Editor** tab



   a. A text editor window will pop up
4. Format or edit the desired text
5. Click anywhere outside the formatting box to exit the **Rich Content Editor**
6. To use the **Rich Content Editor** for choice text, click the choice text
7. Click the dropdown arrow to the right and select **Rich Content Editor**

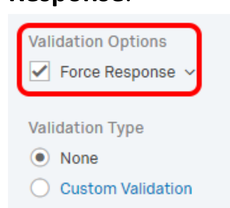


8. Format or edit the desired text
9. Click anywhere outside the formatting box to exit the **Rich Content Editor**

Force Response

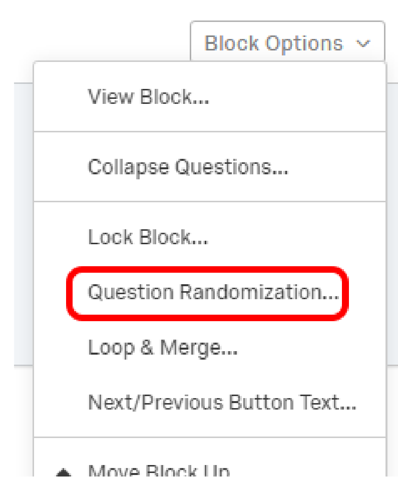
Note: When this option is selected, it requires a compulsory answer to the question from the user.

1. Open the desired project
2. Click the desired question
   a. Question tools will appear on the right
3. Under **Validation Option**, check **Force Response**.



Randomization Options

1. Open the desired project to edit
2. Click the desired question
3. Click the **Block Options** dropdown menu and select **Question Randomization**

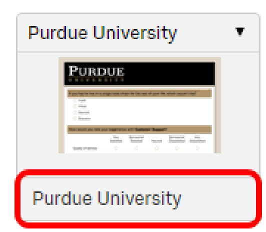


4. Click the desired randomization option
   a. Click **Advanced Randomization** for advanced options
5. Click **Save**

Editing a Project

Look & Feel

1. Open the desired project to edit
2. Under the **Survey** tab, click **Look & Feel**
   a. The **Look & Feel** window will open
3. Click the **Survey Themes** button



4. Click the desired template
   a. A preview will be displayed

5. If desired, you may also change fonts, colors, or edit the header & footer
6. Click **Save**

Survey Options

1. Open the desired project to edit
2. Under the **Survey** tab, click **Survey Options**
    a. The **Survey Options** window will open
3. Check the desired boxes related to the actions
4. Click **Save** when finished

Locked Survey

Note: When a survey has collected responses, the survey will lock in order to prevent invalidation of the collected responses. To unlock the survey to edit questions:

1. Open the desired project to edit
2. Click **Unlock** near the top of the screen:

3. Alternatively, if you open a survey with collected responses and begin editing, the **"Unlock your active survey?"** window will pop up.
    a. Click **Unlock** to unlock your survey.

Preview Survey

1. Open the desired project
2. Click **Preview Survey** under the **Survey** tab
    a. This will preview the survey both in a browser view and a mobile view
3. To exit the preview, click **Close Preview**

Distributing a Survey

Creating a Link to Your Survey

1. Open the desired project and click the **Distributions** tab
    a. Select **Get a single reusable link** under **Email** to generate an anonymous link that can be copied and pasted anywhere
2. Click the desired form of distribution
    a. Select **Use Anonymous Link** under **Web** generate the same type of link as above under **Email**
    b. Select **Social Media** to generate a post on social networks such as Facebook with a link to the survey
    c. Select **Mobile** to generate a QR code that can be used on mobile devices

Email Survey

1. Open the desired project and click the **Distributions** tab
2. Click **Emails** on the left panel
3. Click **Compose Email**
4. In the **To:** field, click **Select Contacts** to generate a new contact list or to select an existing one.
5. In the **When:** field, specify when the mailing will be sent out
    a. **Note:** It is automatically set to **Send in 1 hour**, but can be changed to be sent immediately
6. Fill in the **Subject** field
7. If necessary, click **Save**
8. Set up the **Message:** field as a regular email message
9. If desired, click **Send Preview Email** to see what it will look like for recipients
10. Click **Send**

Post a Survey on Your Website

Note: This generates the HTML for a hyperlink to post on your website.

1. Open the desired project and click the **Distributions** tab
2. Click the **Anonymous Link** tab to the left of the page
3. Click **Customize Link**
4. Enter the text for the hyperlink in the **Link Text** box
    a. The code will appear in the HTML box with a preview below it
5. Copy and paste the HTML code into the webpage's code

Contacts

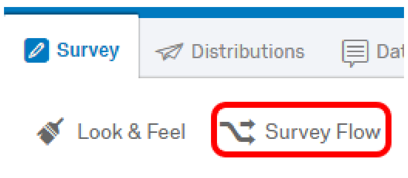
Creating a Contact List

1. Click the **Contacts** tab > **Create New Contact List.**
2. Enter the list name in the **Name** field.
3. Select a folder, if desired.
4. Click **Next**.

5. Click the desired method of adding contacts.
   a. **Import From a File** – upload a spreadsheet of members.
   b. **Add Manually** – fill in a form.
   c. **Import From a Survey** – use previous survey responses to build your panel.
6. Click **Add Contacts**

Editing a Survey Flow

1. Open the desired survey to edit.
2. Click the **Survey Flow** icon in the grey navigation bar.



3. To add a new element, click **Add a New Element Here**.
4. Click the desired element, e.g., **End of Survey**.
5. If desired, click **Move** and drag it to the desired location.
   a. Or, by clicking the element and pressing the **Up** or **Down** arrow key on the keyboard.
6. **Note:** If desired, to add element(s) between blocks, click **Add below** with a block.
7. Click **Save Flow** when finished.

Setting Branch Logic

1. Open the desired survey.
2. Click **Survey Flow**.
3. Click **Add Below** or **Add a New Element Here** > **Branch**.
4. In the branch, click **Add a Condition**.
5. Click the drop-down menus to set the conditions.
6. If desired, click the plus button on the right of the current condition to add multiple conditions.
7. Click **OK** to save the condition(s).
8. If desired, click **Move** and drag the element under the branch that will be displayed if the condition is met.
9. If desired, click and hold the **Move** button of an element, drag it to the **Add a New Element Here** link under the branch.
10. Click **Save Flow** when finished.

Trigger

Setting up an E-mail Trigger

1. On the survey toolbar, click the **Tools** drop-

   down menu.
2. Move the cursor over **Triggers**, click **Email Triggers…**
3. **Note:** By default, the e-mail trigger will be sent whenever a participant completes the survey.
   a. If desired, click **Add a Condition** to set the trigger to send when the survey is completed and a condition is met.
4. Fill in the to e-mail address in the **To Email Address** field.
   a. Separate email addresses with commas
   b. Piped text can also be used to bring in information from the survey
5. Enter a subject in the **Subject** field.
6. Compose a message in the **Message** field.
7. If desired, click **When**, when the triggered message should be sent.
   a. By default, it will be send immediately after a respondent finishes the survey.
8. If desired, un-check **Include a Response Report**.
   a. By default, a response report showing all of the participant's answers will be sent.
9. Click **Finish Editing** > **Save Triggers**.

Quota

Creating a Quota

1. On the survey toolbar, click the **Tools** drop-down menu.
2. Click **Quotas…** > **Add a Quota**
3. Select **Simple Logic Quota** for a standalone logic sets or **Cross Logic Quota** for cross-referencing logic sets
4. Enter a name in the field.

5. If desired, change the number (Quota limit) to the left of the Quota name.

6. Create a condition that needs to be met for the quota to be incremented.
   a. Click the plus button to the right of the condition to add multiple conditions.
7. Click the dropdown newt to, "**When the quota has been met, then:"** to add an action once the quota has been met.
   a. **End the Current Survey** – If a participant fits in the quota, they will immediately be directed out of the survey.
   b. **Prevent All New Survey Sessions** - No new participants will be able to enter the survey once the quota is met
   c. **Do Not Display a Question** – Choose a question to be hidden once the quota has been met.
   d. **Do Not Display a Block** – Choose a block to be hidden once the quota has been met.
   e. **Trigger Web Service –** Opens information from a webpage
   f. **None** – Use the **Display Logic** or the **Survey Flow** in your survey to specify what happens when the quota is met.
8. If **Do Not Display a Question** or **Do Not Display a Block** is selected, check **Only do this if the current respondent meets the quota condition**.
9. Click **Save** when finished.

Changing the Current Quota Count

1. Click the **Tools** drop-down menu > **Quota…**
2. Click the desired quota.
3. If the current count is 0, click **Set Count**.
4. Enter the desired number and click **OK**.
5. If the current count is not 0, click **Reset** to set it back to 0.

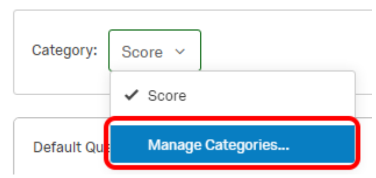
Scoring

1. On the survey toolbar, click the **Tools** drop-down menu > **Scoring…**
2. To give any choice a point value of **1**, click the desired choice once.
   a. The value of **1** will appear to the left of the choice.
3. To give a choice a point value other than 1, highlight the current point value and type the desired value.
4. To automatically score choices, click **Auto** in the desired question block.
5. For a **Matrix Table**, click the desired row statement once.
6. For a **Text Entry** question, type in the desired text in the **Enter Text Response For Grading** field.

   a. Point value of **1** will be automatically assigned after entering the response.
      i. To change the point value, click the current point value and type the desired point value.
   b. To add multiple responses, click the plus button .
7. To clear scores, click **Clear** in the desired question block.

Displaying the Score for Your Participants

1. On the survey toolbar, click the **Tools** drop-down menu > **Scoring…**
2. Click the **Category** drop-down menu > **Manage Categories…**



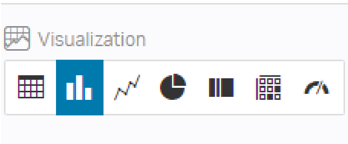
3. On the **Manage Scoring Categories** pop-up window, check **At the End of the Survey** or **After Each Question**.
4. Click **Save**.

Viewing Results

Reports

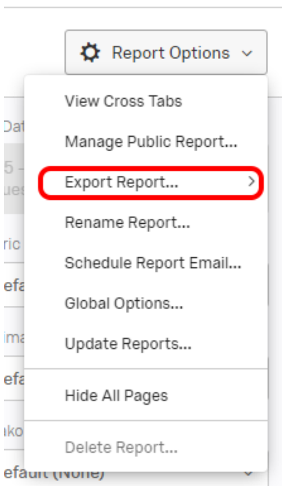
1. Open the desired project and click the **Reports** tab
   a. The **Initial Report** will be opened automatically. To generate a new report, click the **Report** dropdown and select **Create New Report.**

2. To create a visualization via a graph or chart, click **Add Visualization** at the bottom of the page.
3. Use the right panel to change the type of visualization.



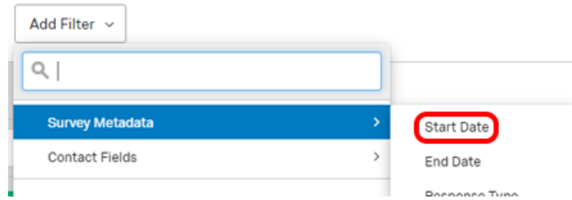
Generating a Report to Word, PowerPoint, Excel, or PDF

1. Open the desired project and click the **Reports** tab
2. On the top right side of the page, click the **Report Options** dropdown
3. Select **Export Report** then the desired format



Filtering a Report by Date

1. Open the desired project and click the **Reports** tab
2. Click the **Add Filter** dropdown
3. Under **Survey Metadata**, select **Start Date**



4. Click the **Select Operator** and choose from the available options
   a. Choosing **Between** will give you the option of a date range.

Create a Printed Report (Previous Format)

1. Open the desired project and click the **Reports** tab
2. Click **Printed Reports**
3. Click **Create New Report**
4. If desired, type a title in the **Report Name** box
5. In the **Generate Report** box, select the **Page Size**, **Layout,** and questions by clicking the checkbox next to them
6. Click **Generate Report**
7. To save, click the **Share** dropdown and select the desired format

Adding New Survey Data

Note: Added survey data will be appended to the current report.

1. Open the desired survey then select the **Reports** tab
2. Click **Printed Reports** then **Create New Report**
   a. If you are adding survey data to an existing report, click on the desired report. Skip to **Step 8**.
3. If desired, change the page size and theme in the **Page Size** and **Theme** categories
4. Under **Select Layout**, click the desired layout
5. Under **Select Questions**, check or un-check the desired question(s) to be displayed in the report.
6. If scoring is desired, under **Select Scoring Categories**, check or un-check **Score**
7. Click **Generate Report**
8. Click the **Report Options** drop-down menu.
9. Place the cursor over **Data Source Options** and click **Add a New Data Source...**
10. Click the **Choose a Survey...** drop-down menu and select the desired survey.

11. Click the **Data Source** options dropdown icon 
12. Click **Generate Report**.
13. Select either **Create a new page for each question** (recommended) or **Merge this data source with the existing report.**
14. Click **Generate Report** when finished

Removing Data Source

1. Open the desired survey then select the **Reports** tab, **Printed Reports**, and the desired report
2. Click the **Report Options** drop-down menu.

3. Place the cursor over **Data Source Options** and click **Remove Data Source**.
    a. If a report contains multiple data sources: Place the cursor over **Data Source Options**, move the cursor to the desired survey's name.
    b. Click **Remove Data Source**.
4. If desired, un-check the option(s).
5. Click **Remove Data Source**.

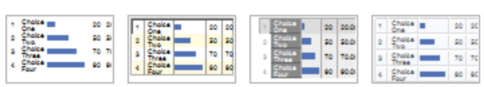
Changing Table Type

1. Open the desired survey then select the **Reports** tab, **Printed Reports**, and the desired report
2. Click the desired table.
    a. Table toolbar appears.

3. Click the **Table Type** drop-down menu and select the desired type.

Changing Table Options

1. Open the desired survey then select the **Reports** tab, **Printed Reports**, and the desired report
2. Click the desired table.
3. Click the **Table Options** drop-down menu.
4. To change table appearance, click one of the four images under **Fonts**.



5. To Sort the data in the table, place the cursor over **Sort By** and select the desired option.
6. To show/hide columns, place the cursor over **Show/Hide Columns** and check or un-check the desired column(s).
7. To show/hide rows, place the cursor over **Show/Hide Rows** and check or un-check the desired row(s).
8. To change the data format, place the cursor over **Data Format** and select the desired format.
9. To export table, place the cursor over **Export Table To** and select the desired download format.
    a. Save or download the file.

Changing Table Layout

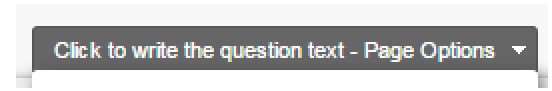
1. Open the desired survey then select the **Reports** tab, **Printed Reports**, and the desired report
2. Click the desired table.
3. Click the **Layout** drop-down menu and select the desired layout option.

Adding New Page

1. Open the desired survey then select the **Reports** tab, **Printed Reports**, and the desired report
2. At the bottom left corner, click **New Page**.
    a. The new page will be appended to the last page.

Removing a Page

1. Open the desired survey then select the **Reports** tab, **Printed Reports**, and the desired report
2. On the top right corner of a page, click the page name > **Page Options** drop-down menu > **Remove Page**.



Reordering Page

1. Open the desired survey then select the **Reports** tab, **Printed Reports**, and the desired report
2. On the left side, click the desired page.
3. Drag the page up or down to the desired location.

Adding New Table/Graph

1. Open the desired survey then select the **Reports** tab, **Printed Reports**, and the desired report
2. On the desired page, click **New Table** or **New Graph** icon from the toolbar.
3. On the page, click the desired table or graph.
4. If desired, change the data source.
    a. From the report toolbar, click the **Data Source** drop-down menu > **Select Data Source...** drop down menu.
    b. All data sources will be included in the new graph or table. Click the drop-down menu listing the data source to change the data source or click the  icons to remove or add a data source

Export Report

Qualtrics Format (qrf)

1. Open the desired survey then select the **Reports** tab, **Printed Reports**, and the desired report.
2. Click the **Report Options** drop-down menu > **Save To File…**
3. Save or download the file.

Other Formats (PDF, xls, docx, or pptx)

1. Open the desired survey then select the **Reports** tab, **Printed Reports**, and the desired report.
2. On the right side, click the **Share** drop-down menu.

3. Click the desired report format based on the corresponding icon.
4. Save or download the file.

Importing a Report

Note: Imported report will replace the current report.

Note: Qualtrics only supports Qualtrics formatted report type (**qrf**).

1. Open the desired survey then select the **Reports** tab, **Printed Reports**, and the desired report.
2. Click the **Reports Options** drop-down menu > **Import Report…**
3. Click **Browse…** to locate and open the desired report.
   a. Click **Choose File** if using Google Chrome.
4. Click **Import**.

Searching Recorded Responses

1. Open the desired project and click the **Data & Analysis** tab
2. Under the **Data** tab, select **Add Filter**
   a. Search responses between dates, by type, specific panel members, name, e-mail, or external data reference.

Export Data

1. Open the desired project and click the **Data & Analysis** tab
2. Click **Export/Import**
3. Click **Export Data**
4. Click **Export Complete Data Set**
5. Select the file type among the tabs listed for CSV, XML, SPSS, and other types of files
6. Click **More Options** to change the options for the downloaded data
7. Click **Download**
   a. Files are automatically set to be compressed as a .zip file. Uncheck the "**Compress data as .zip file**" box under **More Options** to download an uncompressed file.

Export

Exporting Survey

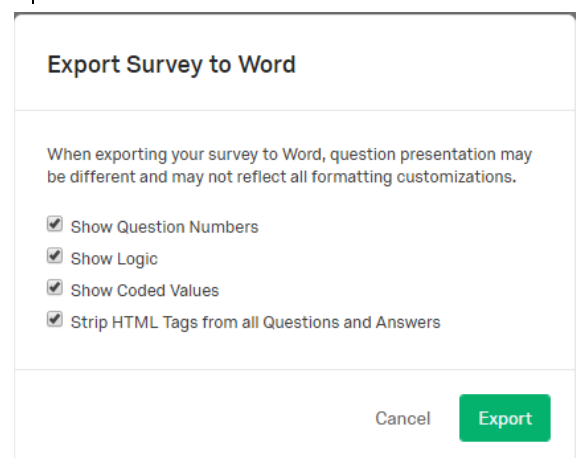
Note: A Qualtrics format (.**qsf**) file will be downloaded.

1. Open the desired project and click the **Tools** drop-down menu > **Export Survey**.
2. Save or download the file.

Exporting Survey to Word

Note: A Microsoft Word format (.**docx**) file will be downloaded.

1. Open the desired project and click the **Tools** drop-down menu > **Export Survey to Word…**
2. If desired, check or un-check the following options.



3. Click **Export**.
4. Save or download the file.

Import Survey

Note: Only .qsf (Qualtrics Survey Format) files can be imported

1. On the **My Projects** page, click **Create Project**
2. On the left, select **From a File**
3. Click **Choose a .QSF File** and navigate to the desired survey
4. Click **Open**.
5. Enter a **Project Name** and if desired, select a folder
6. Click **Create Project** when finished

Closing a Survey

1. On the **My Projects** page, click the **Actions** button to the right of the desired survey
2. Click **Close** from the dropdown
3. In the window that pops up, select whether to **Close all active survey sessions and record them as partial data** or **Allow all active survey sessions to be finished**
4. Click **Pause Response Collection**

Deleting a Project

Note: This will **permanently** remove both the survey and all responses.

1. On the **My Projects** page, click the **Actions** button to the right of the desired survey
2. Click **Delete Project** from the dropdown
3. In the window that opens, check the textbox next to "All data related to this project will be permanently deleted."
4. Click **Delete Project**