

Qualtrics

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**Saint Mary's
University**

Qualtrics account

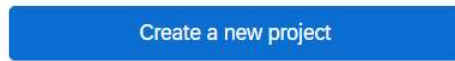
To get a SMU licensed Qualtrics account, please contact the [Software and Application Support Centre](#).

**Email at sas@smu.ca
or drop by at our office (AT107).**

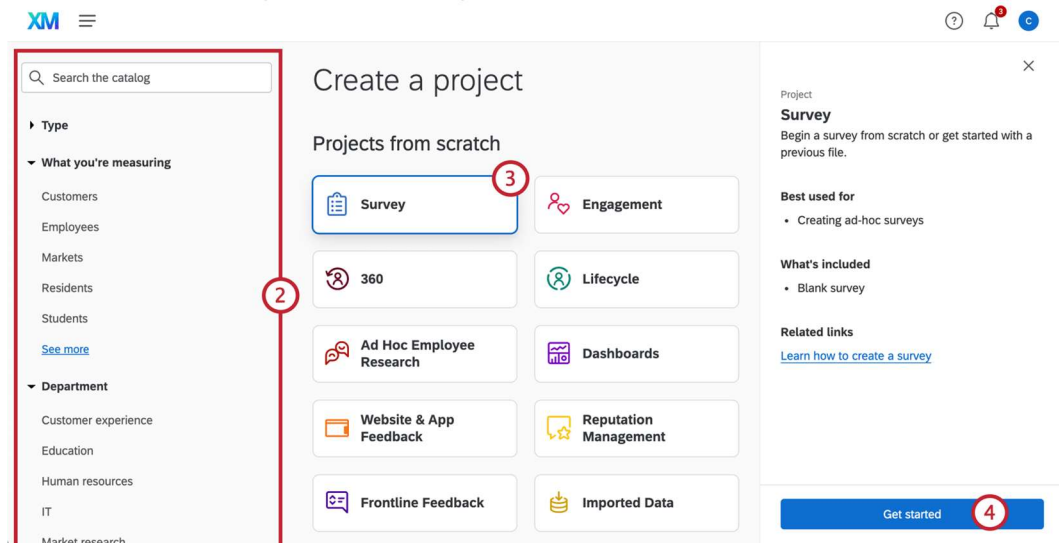
Creating New Projects

A typical project consists of a survey, a distribution record, responses, and reports.

1. From the homepage, click the **Create new project** button on the bottom left corner.



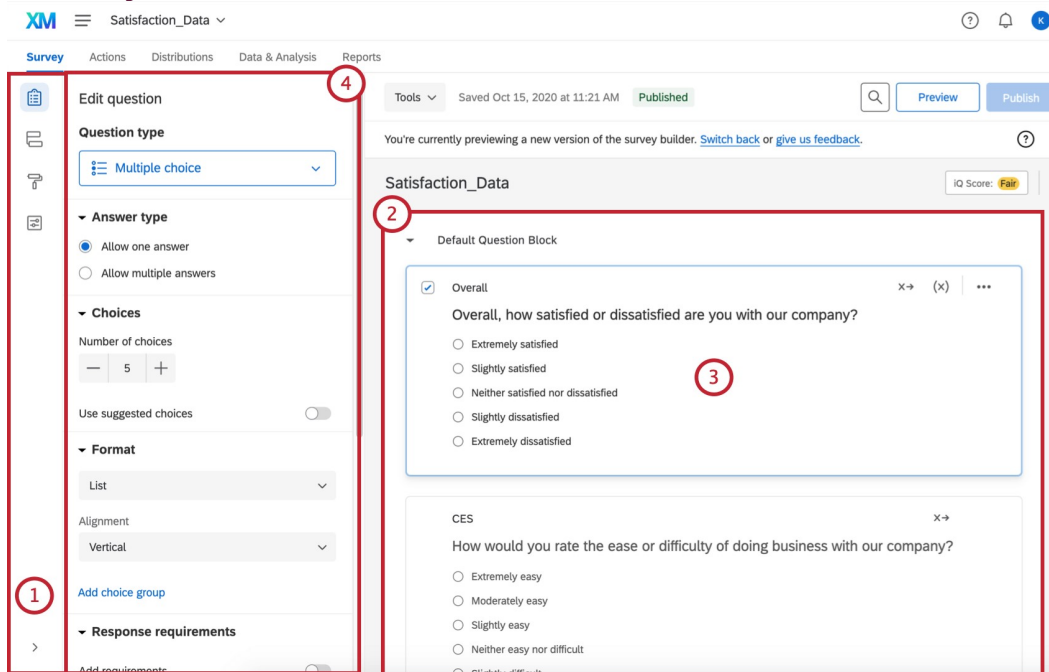
2. To start with from a template, scroll through the sections or filter or search to find the type of project you'd like to create.



3. To start from scratch, select **Survey**.
4. Click **Get Started**.
5. Enter a **Name** for your survey.
6. Choose **Create a blank survey project**.
7. Click **Create project**.

After clicking "Create project," you'll be taken to the Survey tab where you can begin [adding questions](#) to your survey.

Survey



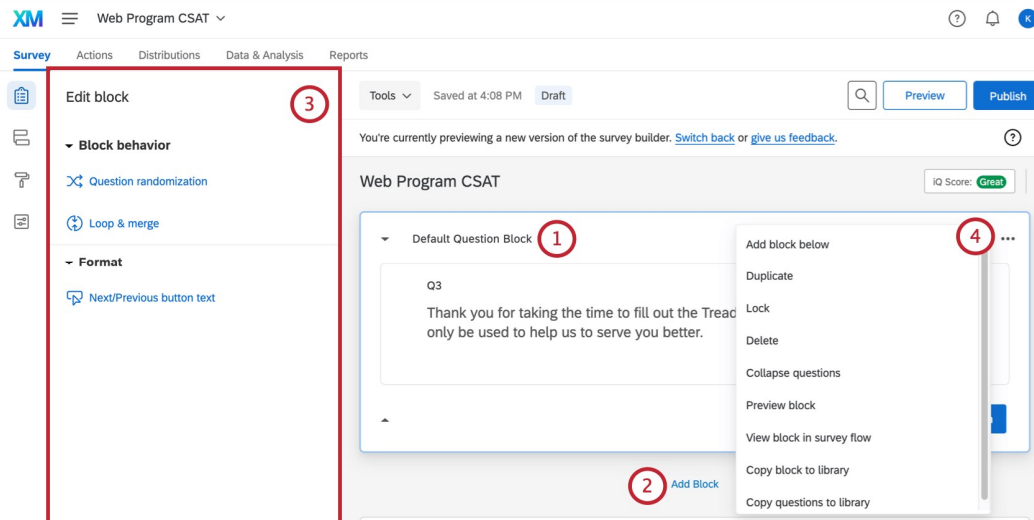
The screenshot shows the Survey Builder interface for a survey titled "Satisfaction_Data". The interface is divided into several sections:

- 1. Survey toolbar:** Located at the top left, it includes navigation icons and a search bar.
- 2. Question block:** The main area where questions are added and edited. It shows a "Default Question Block" with a question: "Overall, how satisfied or dissatisfied are you with our company?". The question is currently selected, and its options are visible: "Extremely satisfied", "Slightly satisfied", "Neither satisfied nor dissatisfied", "Slightly dissatisfied", and "Extremely dissatisfied".
- 3. Question editing area:** The area where the question text and options are being edited. It includes a text input field for the question and radio button options for the choices.
- 4. Question editing pane:** A sidebar on the left side of the interface, titled "Edit question". It contains settings for the question type (Multiple choice), answer type (Allow one answer), number of choices (5), format (List), and alignment (Vertical).

1. Survey toolbar
2. Question block
3. Question editing area
4. Question editing pane

Block Basics

All survey questions are created, edited, and stored inside blocks. Every survey includes at least one block initially called the Default Question Block.



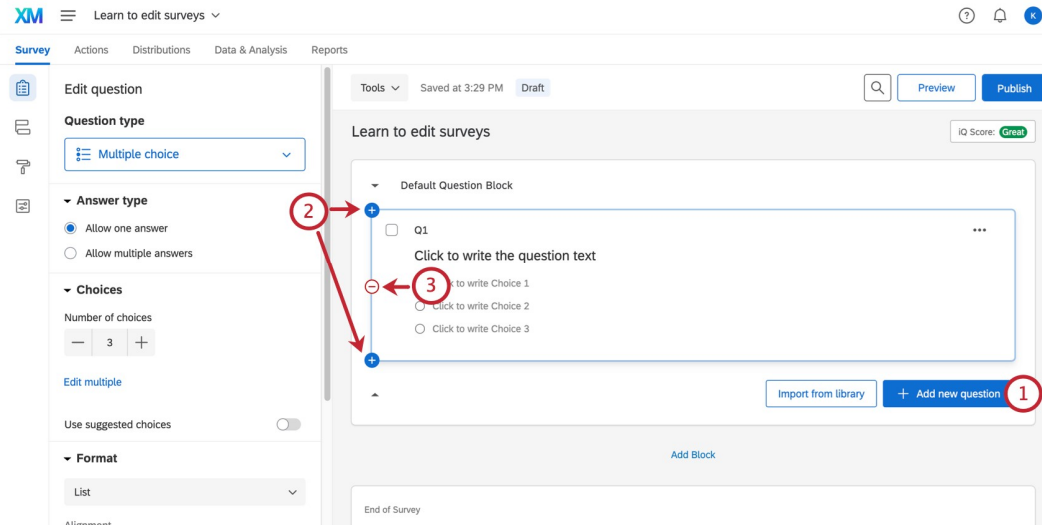
1. **Block name:** Change at any time by clicking directly on the name and typing a new one.
2. **Add Block:** Lets you create new blocks.
3. **Block editing pane:** Appears when you click the block (e.g., white space next to the name) without clicking a question. Make changes to block behavior and formatting. Includes [question randomization](#), [loop & merge](#), and the ability to edit [Next / Previous button text](#).
4. **Block Options menu:** Displays an array of one-click block editing choices.

For simple surveys, placing all of your questions in a single block is just fine. But as surveys become more intricate, organizing questions into multiple blocks allows the application of a sophisticated [survey flow](#), including [branches](#), [randomization](#), [authentication](#), and [embedded data](#). Visit the [Displaying Blocks](#) page to learn how to take full advantage of blocks in building sophisticated survey flows.

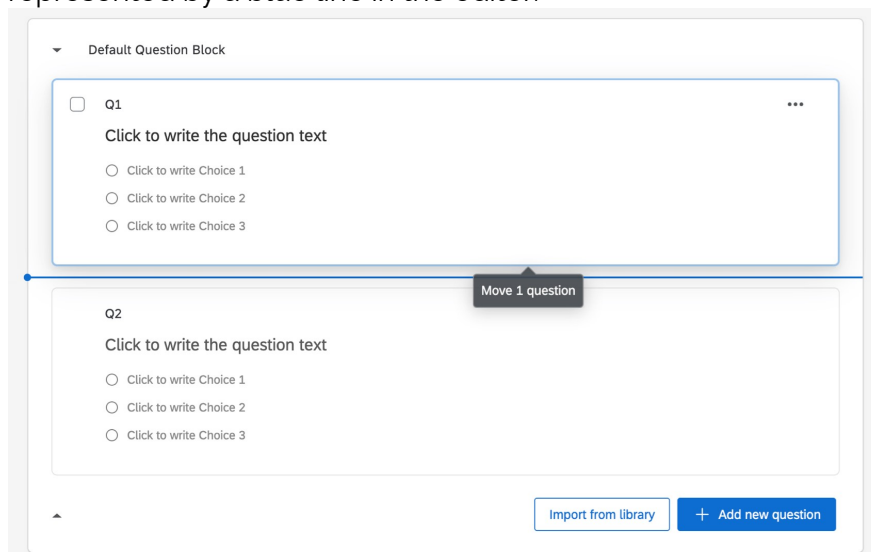
Question & Editing Pane Basics

Initially, a default multiple-choice question will be inserted into your "Default Question Block." This ensures that your block has at least one question to start with.

1. To add additional questions to a block, click **Create a New Question**.



2. To add more questions, hover over any existing question and click the plus (+) buttons (either above or below the existing question).
3. Click the minus (-) sign to delete a question.
4. Move questions around the survey by clicking and dragging them. The question you move will be highlighted in blue, and where it lands is represented by a blue line in the editor.



EDITING QUESTION TEXT

You'll write questions, edit question text, and apply text formatting in the question editing area.

Question Specific Pages (Matrix, Slider, etc.)

Block 1

Rich Content Editor **3** Piped Text... **2** HTML View Normal View ...

What is the capital of Uruguay?| **1**

✎ Edit Question Label

New Uruguay

Montevideo

Panama City

Q15

Please rate the following personality statements.

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
--	-------------------	-------------------	----------------------------	----------------	----------------

1. Click in the question text (or answer choice) text boxes to enter or edit your text.
2. Click the [Piped Text](#) button to grab information from previous questions and blocks (e.g., pulling in someone's name from a Demographics Block to personalize a question).
3. Click the [Rich Content Editor](#) button to format your text by changing fonts, font sizes, applying bolds, bullets, italics, and more.

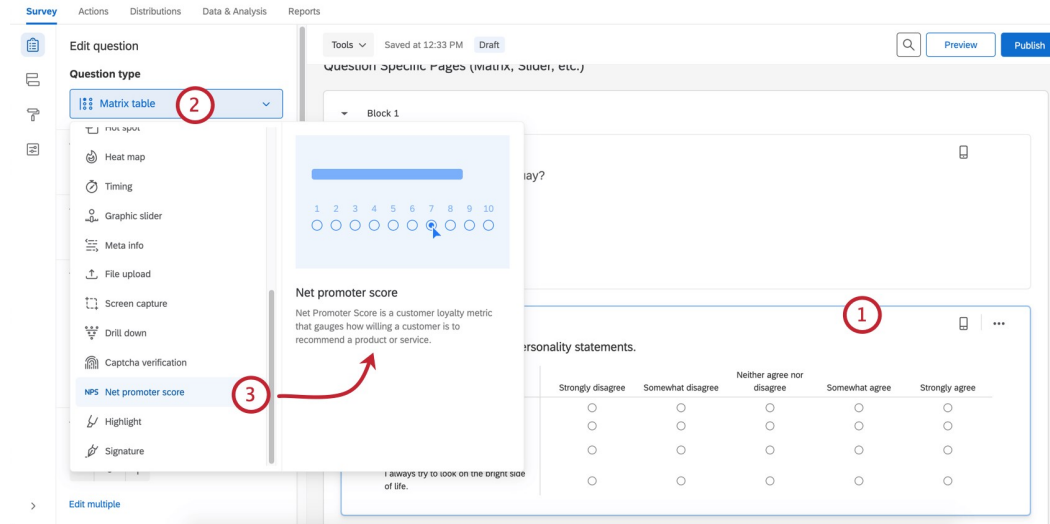
Warning: Questions are numbered in the order you create them. If you change the order of your questions by moving a question up or down, the question numbers DO NOT change.

Participants will see your questions in the order they appear the survey builder, regardless of numerical order in which you created the questions. Read the [Auto-Number Questions](#) page if you wish to re-number your questions, but that's not typically necessary.

CHANGE QUESTION TYPES

When you first click **Create Project**, a multiple choice question is inserted into your first question block by default. However, you might want to change it to another type or style of question. Use the question editing pane to choose among more than a dozen [question types](#) (e.g., Multiple Choice, Rank Order, Heat Map, NPS, Graphic Slider, among many others).

To change question types:



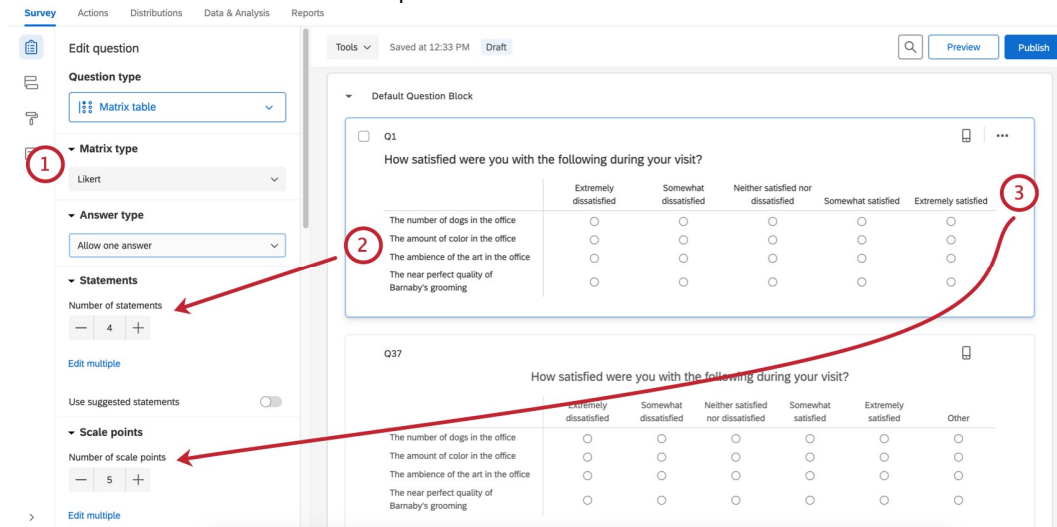
1. Open the editing pane by clicking on a question.
2. Click the dropdown menu under **Question type**.
3. Hover over an option to get an explanation.
4. Click the option to select the question's type.

EDITING PANE OPTIONS

You can also use the editing pane to apply the specific options available for each unique question type (e.g., suggested choices, vertical or horizontal positioning, force response, etc.).

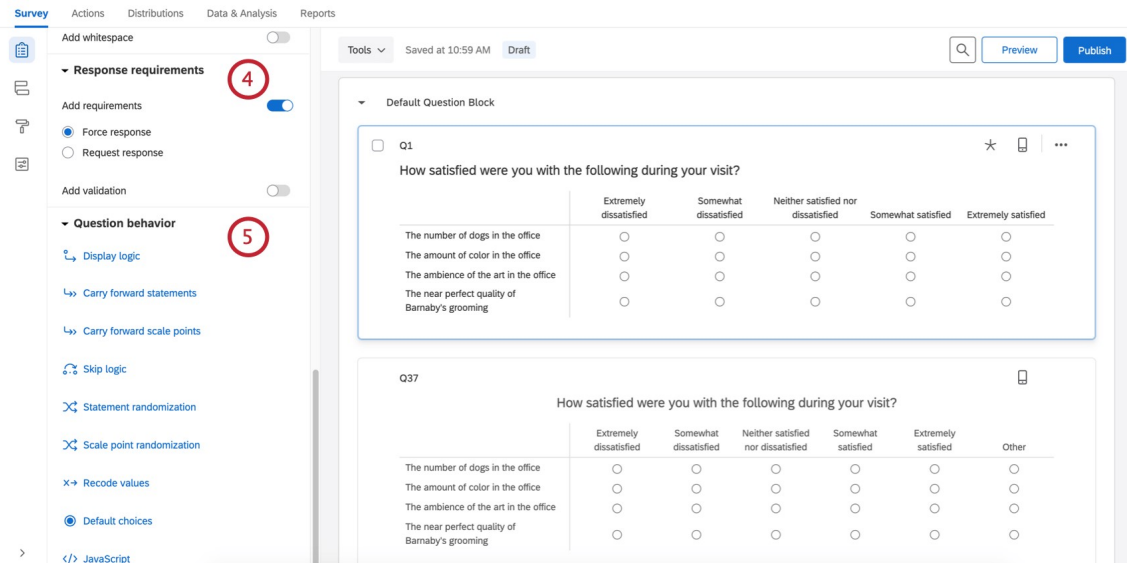
Let's demonstrate how these commands work with the [matrix table](#) question type:

1. **Matrix Type:** In this case, choose whether the matrix is formatted as a series of Likert scales, as a bipolar table, or more.

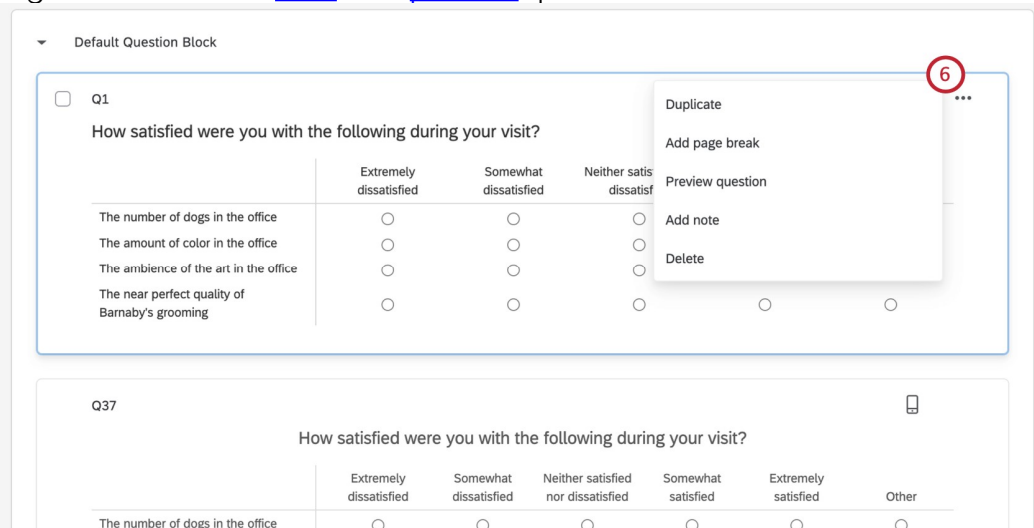


The screenshot shows the 'Edit question' pane on the left and the 'Default Question Block' on the right. The 'Matrix type' dropdown is set to 'Likert' (circled 1). The 'Number of statements' is set to 4 (circled 2). The 'Number of scale points' is set to 5 (circled 3). The matrix table shows four statements and five response options: 'Extremely dissatisfied', 'Somewhat dissatisfied', 'Neither satisfied nor dissatisfied', 'Somewhat satisfied', and 'Extremely satisfied'.

2. **Statements:** Use the + or – buttons to increase or decrease the number of possible statements.
3. **Scale Points:** Use the + or – buttons to increase or decrease the number of possible scale points.
4. **Response requirements:** Click **Force response** if you want to require a respondent to answer this question before continuing, or add other types of [validation](#).



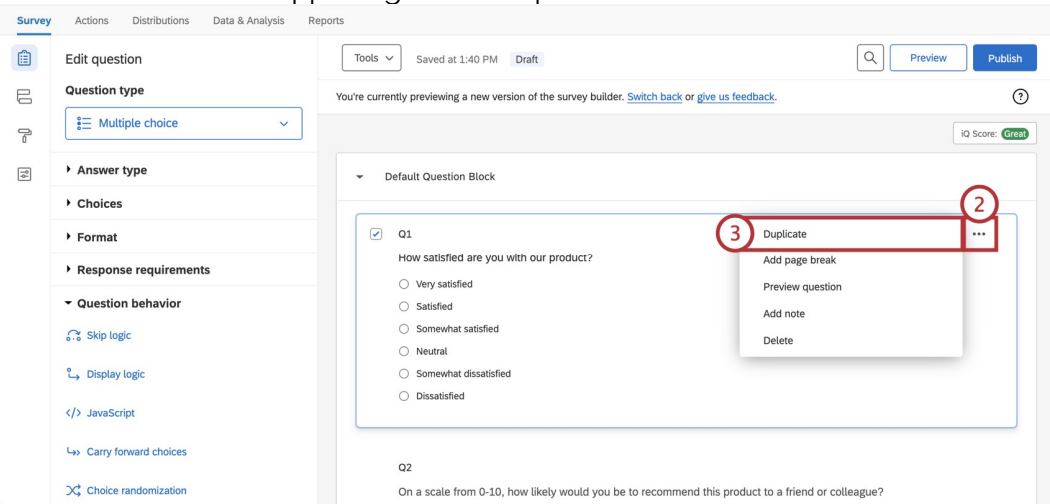
5. **Question behavior:** Add [display](#) or [skip](#) logic to the question, and more.
6. **Actions:** Lets you duplicate a question, add a [page break](#) after it (to separate pages so the respondent won't see too many questions on a single screen), add a [note](#), and [preview](#) questions.



Since there are more than a dozen different question types with a multiplicity of editing pane options for each, you'll want to explore each of these more in the [Creating Questions](#) and [Question Types](#) support pages.

TO COPY A QUESTION FROM YOUR CURRENT SURVEY

1. Select the question.
2. Click the dots in the upper-right of the question.

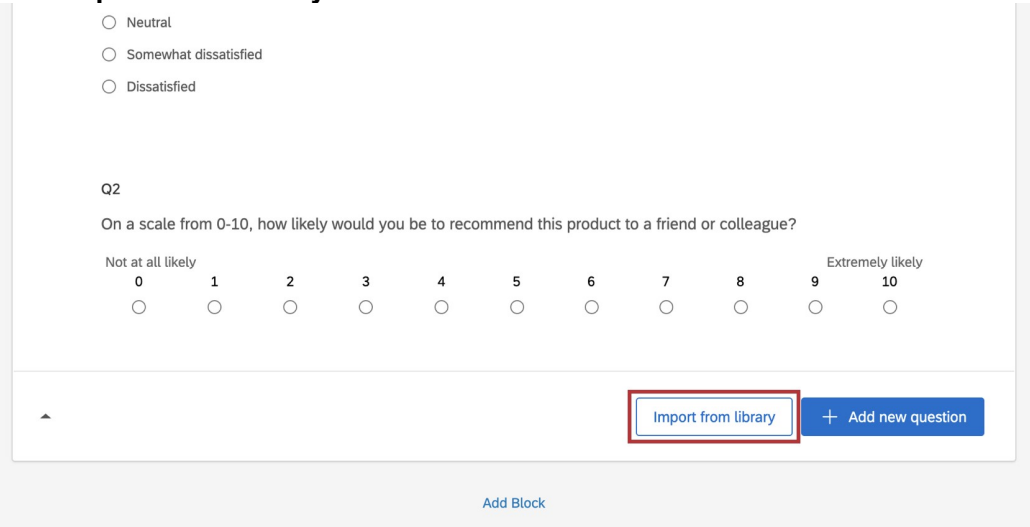


The screenshot shows the 'Edit question' interface in a survey builder. On the left is a sidebar with various settings like 'Question type' (Multiple choice), 'Answer type', 'Choices', 'Format', 'Response requirements', and 'Question behavior'. The main area displays a question block for 'Q1: How satisfied are you with our product?' with radio button options: 'Very satisfied', 'Satisfied', 'Somewhat satisfied', 'Neutral', 'Somewhat dissatisfied', and 'Dissatisfied'. A context menu is open over the question, with 'Duplicate' highlighted. A red box labeled '3' is around the 'Duplicate' option, and another red box labeled '2' is around the three-dot menu icon. Below Q1 is Q2: 'On a scale from 0-10, how likely would you be to recommend this product to a friend or colleague?'. The top of the interface shows 'Tools', 'Saved at 1:40 PM', 'Draft', 'Preview', and 'Publish' buttons.

3. Select **Duplicate**.

TO COPY A QUESTION FROM A PREVIOUS SURVEY

1. Click **Import from library**.



Neutral
 Somewhat dissatisfied
 Dissatisfied

Q2

On a scale from 0-10, how likely would you be to recommend this product to a friend or colleague?

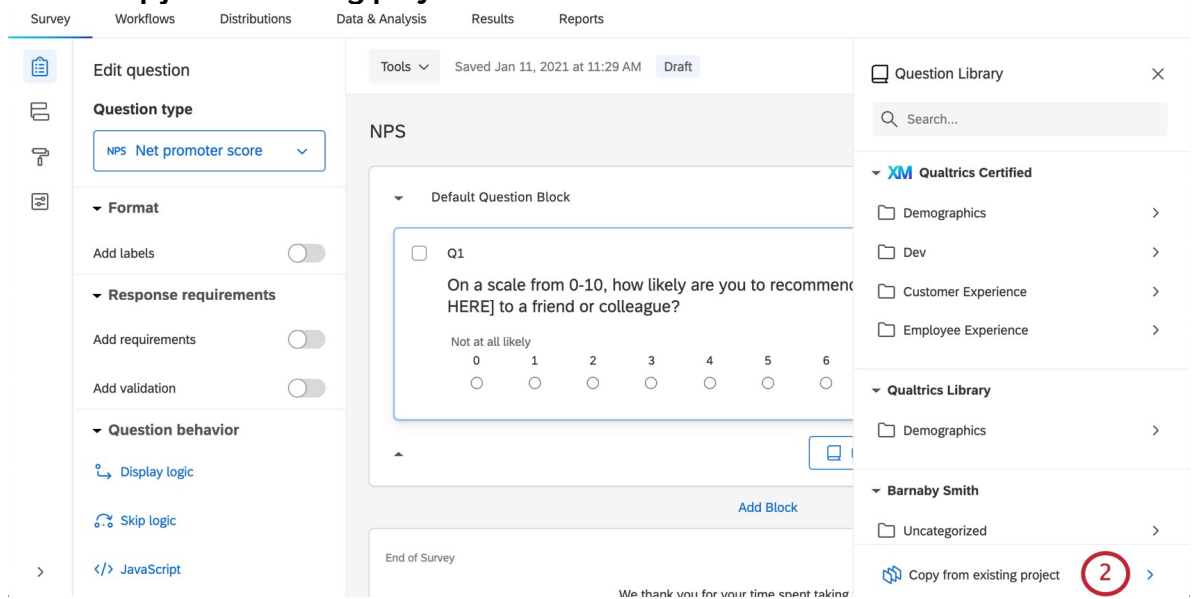
Not at all likely Extremely likely

0 1 2 3 4 5 6 7 8 9 10

Import from library
+ Add new question

Add Block

2. Select **Copy from existing project**.



Survey Workflows Distributions Data & Analysis Results Reports

Tools Saved Jan 11, 2021 at 11:29 AM Draft

Edit question

Question type
NPS Net promoter score

Format
Add labels

Response requirements
Add requirements
Add validation

Question behavior
Display logic
Skip logic
JavaScript

NPS

Default Question Block

Q1
On a scale from 0-10, how likely are you to recommend [HERE] to a friend or colleague?

Not at all likely Extremely likely

0 1 2 3 4 5 6

Add Block

End of Survey

We thank you for your time spent taking

Question Library

Search...

XM Qualtrics Certified

- Demographics
- Dev
- Customer Experience
- Employee Experience

Qualtrics Library

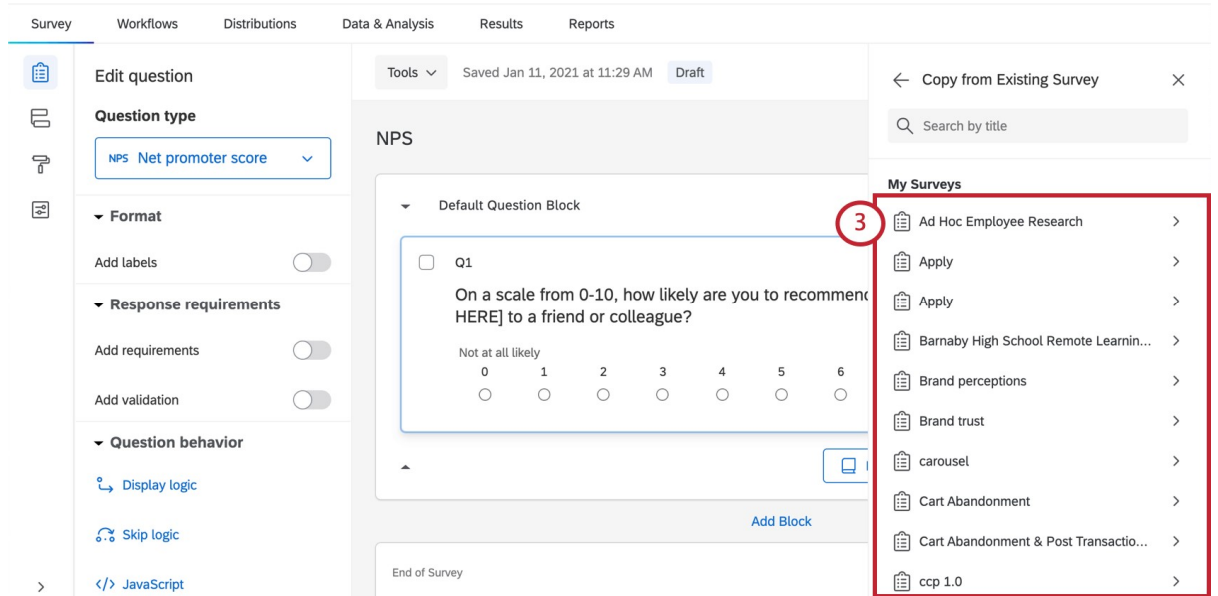
- Demographics

Barnaby Smith

- Uncategorized
- Copy from existing project** 2

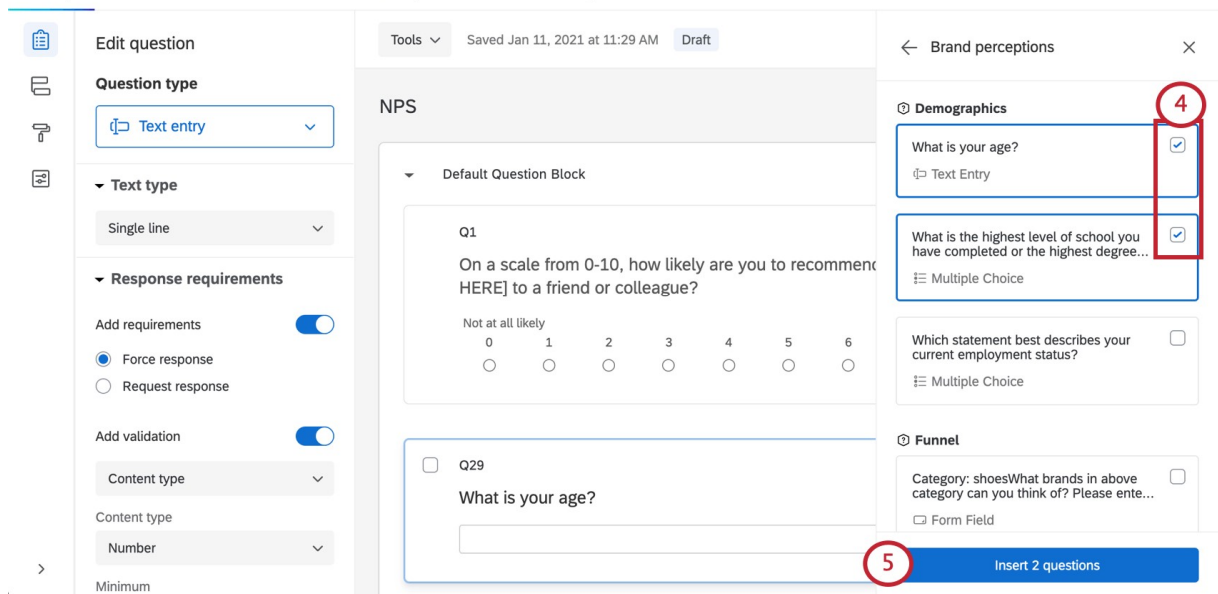
Note: You can also add questions from your library, use prebuilt Qualtrics content such as certified questions, or use the search bar to find what you need.

- Select the survey you want to copy the question(s) from.



The screenshot shows the 'Edit question' interface for an NPS question. A 'Copy from Existing Survey' dialog is open on the right, displaying a search bar and a list of surveys under 'My Surveys'. The survey 'Ad Hoc Employee Research' is selected and highlighted with a red box. A red circle with the number '3' is positioned over the survey list.

- Use the checkboxes to select the question(s) you would like to copy.

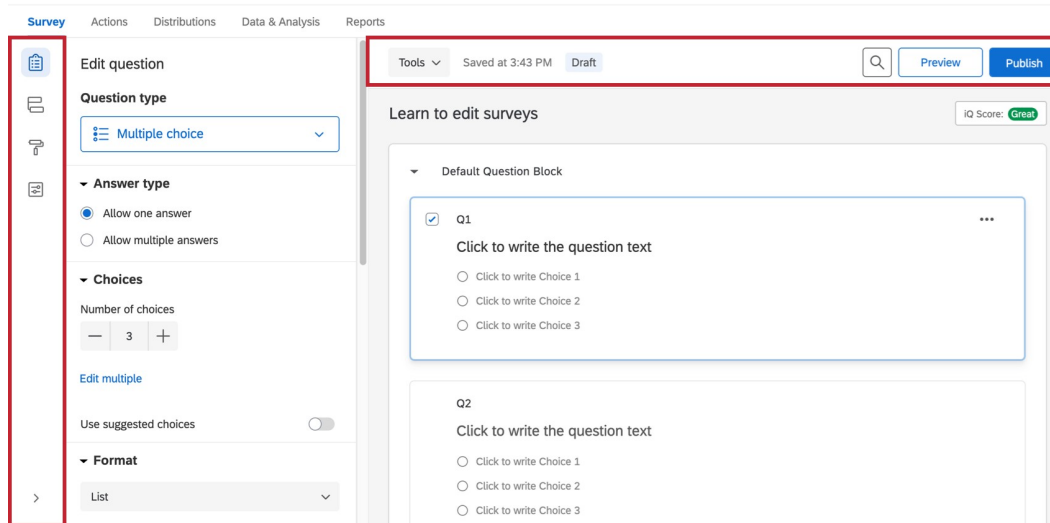


The screenshot shows the 'Edit question' interface for a 'Text entry' question. The 'Brand perceptions' survey is selected in the dialog. The 'Demographics' section is expanded, and two questions are selected with checkboxes: 'What is your age?' and 'What is the highest level of school you have completed or the highest degree...'. A red circle with the number '4' is placed over the checkboxes. A red circle with the number '5' is placed over the 'Insert 2 questions' button at the bottom right.

- Click **Insert question(s)**.

Survey Toolbar and Navigation Basics

The toolbar along the left manages your survey's design options, security settings, and logic structures (i.e., Survey Flow). The toolbar along the top also lets you preview, publish, and search your survey.

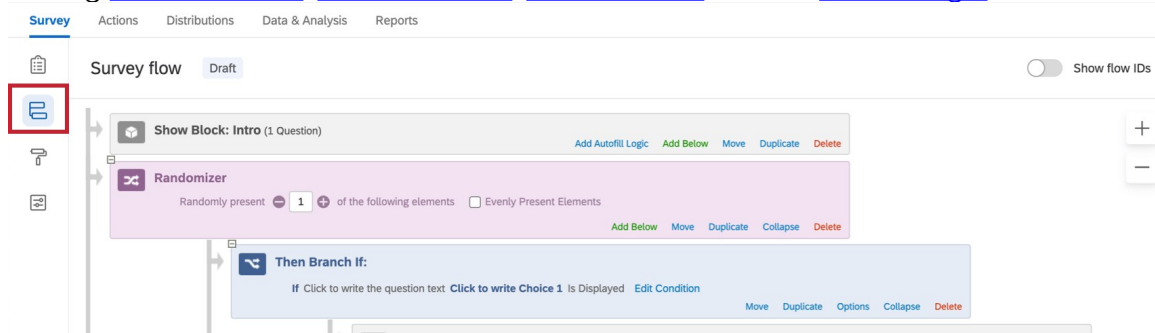


SURVEY FLOW

The [Survey Flow](#) section gives a block-level view of your survey and details the order in which blocks are displayed to your respondents. From here you can customize where respondents go in your survey, what they see, and what they don't see.

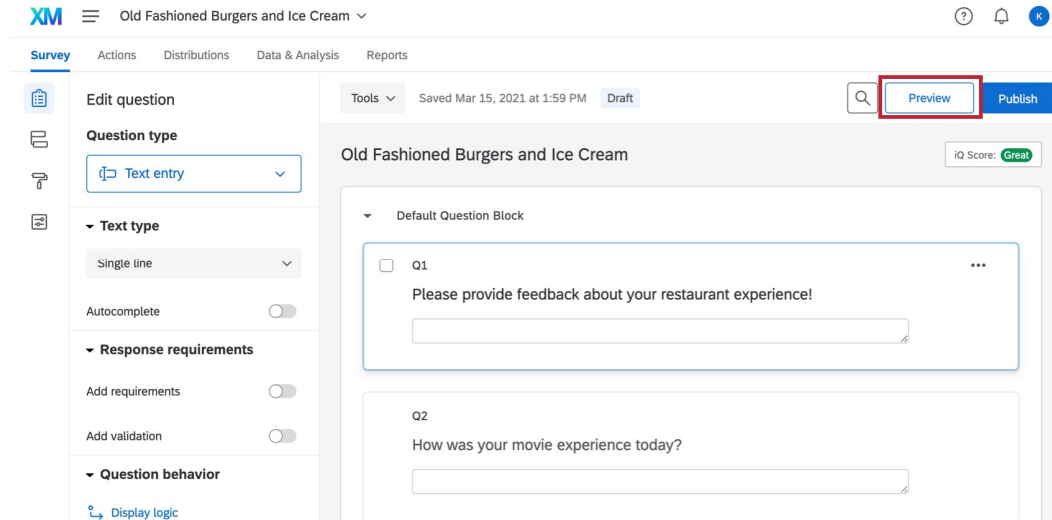
You can perform simple tasks like rearranging blocks, or you can add elements like [branch logic](#) that directs and personalizes your respondents' survey experience.

By selecting **Add Below** or **Add a New Element Here** in the Survey Flow, you can continue to customize your respondent's path through your survey by adding [randomization](#), [authenticators](#), [web services](#), or new [branch logic](#).



Preview Surveys

Once you have finished building your survey, you can preview it to ensure that everything is working the way you want by clicking **Preview** in the top-right of the Survey tab.



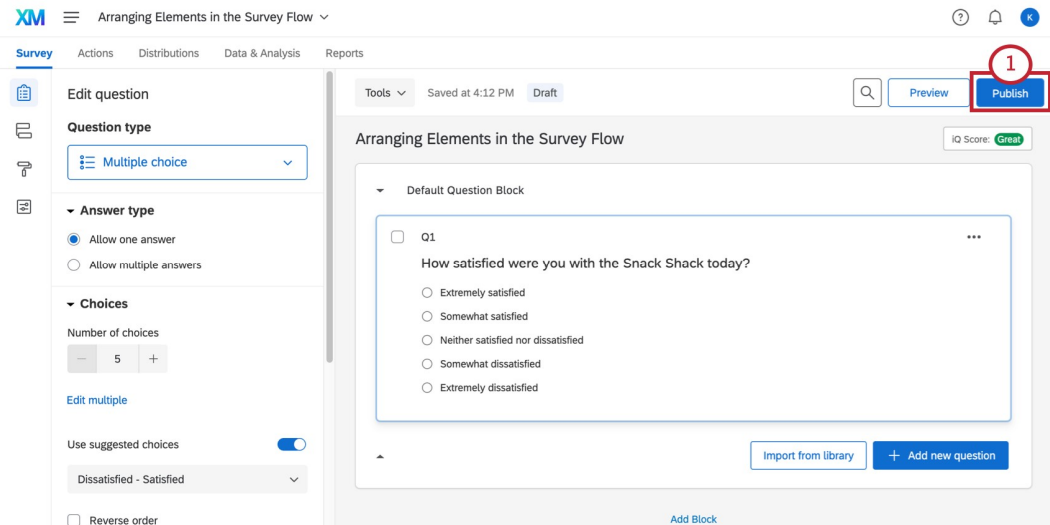
In the preview survey mode, you can answer questions and move through the survey the same way your respondents would with a real link. The survey will look the same as in the real link, except you'll have some additional options available at the top to help you test your survey; these options won't appear in the real link.



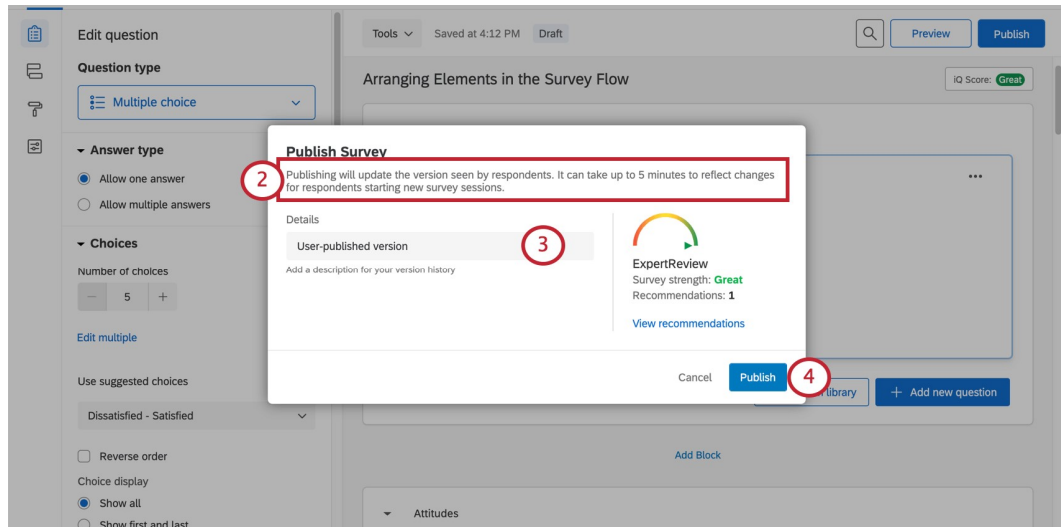
Publishing and Distributing a New Survey

When you publish a survey, it'll be a little different if your survey is active and open to responses than if it is new. If your survey is new, the first time you publish will also activate a survey.

1. When you are ready to save your changes and present them to your respondents, click **Publish**.



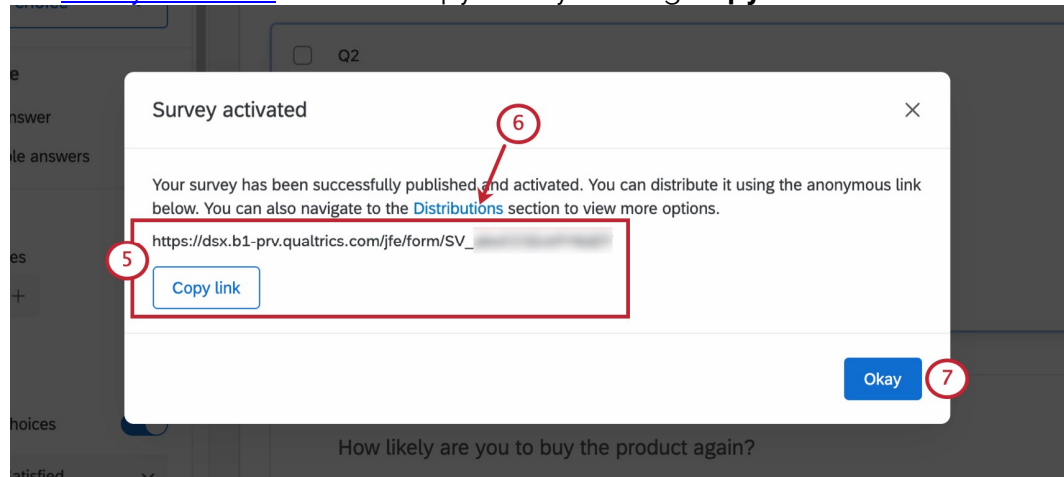
2. Read the description and note that **your survey is about to be activated**. This means you will have to press publish after making changes, or else the active survey will look like the last published version.



3. In addition to publishing your survey, you are saving a new version of it. Add a description of the changes you've made. This can be

whatever you like. Dates will automatically be stored with the version, so don't worry about adding date labels.

4. Click **Publish**.
5. Your survey has now been activated! On this window is the [anonymous link](#). You can copy this by clicking **Copy link**.

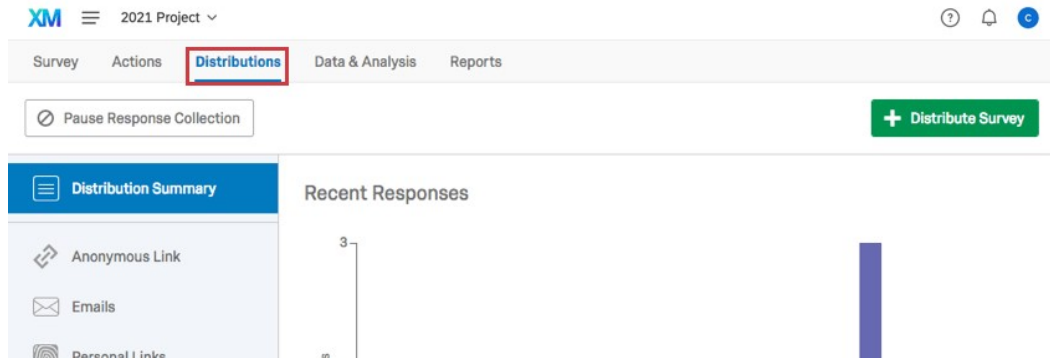


6. If you plan on recording participant data with responses, emailing the survey through Qualtrics, sending through SMS, or something else, you can see all your distribution options by clicking **Go To Distributions**. This will bring you to the [Distributions tab](#).
7. If you aren't ready to distribute yet, click **Okay** to resume editing your survey.

Distributions Tab

Select the **Distributions** tab to:

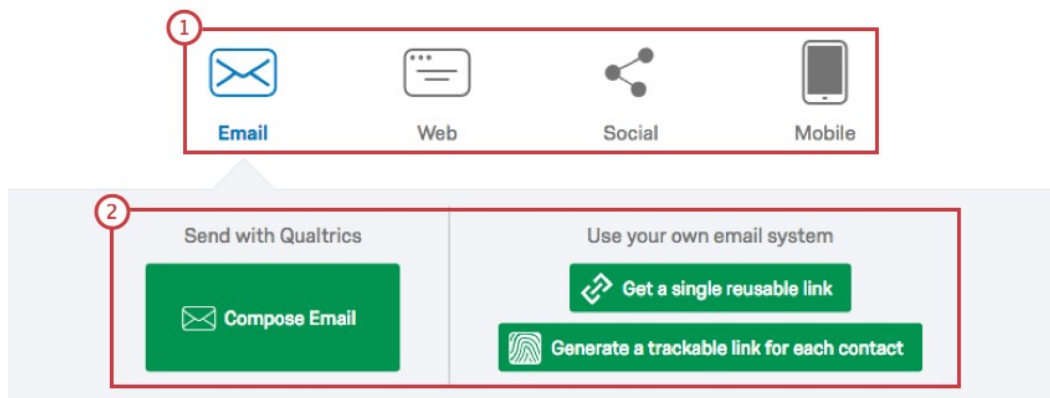
- Activate a new survey
- Start [collecting responses](#)
- Monitor your response collection metrics



CHANNELS & METHODS

As the Distributions tab first opens, you'll need to pick a distribution channel and a method within that channel to start collecting survey responses.

How do you want to distribute your survey?



1. **Channels:** Choose from **Email, Web, Social,** or **Mobile.**
2. **Methods:** Pick from the available invitation options (e.g., email invites can be sent via the Qualtrics mailer or through your own email system). The options available here will change depending on the channel you have selected.