
Qualtrics Survey Research Suite Reference Guide

Project Tab

Use the Projects tab as your Qualtrics homepage to manage of all your surveys, organize them into folders, and keep track of the survey status, number of responses, survey owner, date modified, and tasks. This tab also contains many shortcuts to other Qualtrics features.



Menu Buttons

Contacts: Takes you to your contacts lists.

Library: Shows you your library of surveys, graphics, and messages.

Help & Feedback: Get access to Qualtrics University or contact Qualtrics themselves.

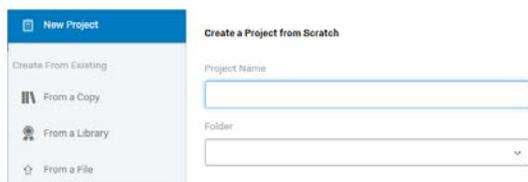
Folders

All Projects: A list of all of your surveys in your ownership.

Shared with Me: A list of surveys that are shared with you from other Qualtrics users.

Create Project button

Use the green Create Project button to choose how you want to build and name your survey.



New Project: Build a survey from scratch.

From a Copy: Build a survey based off an existing survey.

From a Library: Build a survey from a template.

From a File: Upload an existing survey.

Survey Tab

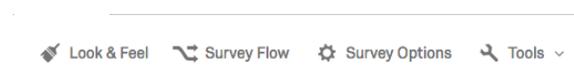
Once you create your new survey or upload an existing one, use Survey tab to create questions, organize the survey flow, customize design, and set survey options.

Look & Feel: Customize options such as the progress bar, back and next button text, header, and footer.

Survey Flow: Set up the presentation order of your survey question blocks. Add branches, embedded data, randomization, web services, authenticator, survey termination, and conjoint analysis.

Survey Options: Configure survey settings for options such as survey experience, survey protection, survey termination, inactive surveys, partially completed surveys, and response sets.

Tools: Configure survey settings further via spell check, translating your survey, testing the survey, or printing a hard copy of the survey.



Preview Survey: Allows you to preview the survey as a respondent would view it.

Block Options: Define settings for a block or section such as question randomization, loop and merge, and block arrangement.

 **Advanced Question Options:** Recode values for analysis on the back-end and add display logic, skip logic, carry forward choices, and randomization.

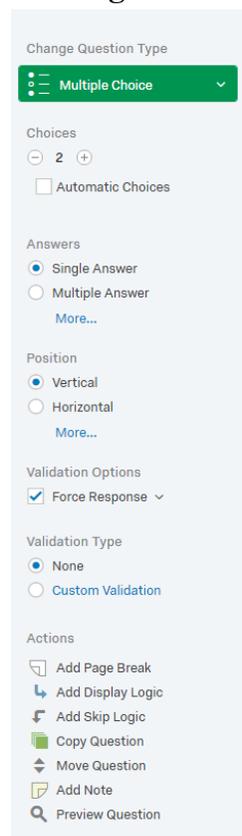
Questions Menu

Use to edit question options such as how many answer choices, positioning, validation, page breaks, logic, etc. This side menu bar offers question options based on the selected question type. These options will change with each question type.

Change Question Type: You can choose from a variety of question types.

Validation Options: Use to force a response or request a response to a question before moving on.

Add Page Break: Adds a page break to



separate your questions across pages in your survey.

Add Display Logic: Will display the selected question only if a certain criteria is met in a previous question.

Add Skip Logic: Allows a respondent to skip a group of questions based on a response to a certain question.

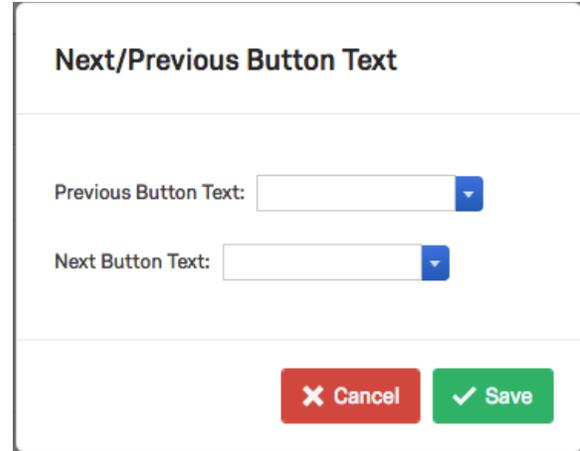
Copy Question: Copies the question and repeats it in a separate block.

Move Question: Lets you move the selected question up or down within your survey.

Preview Question: Preview how the question will look to respondents.

Block Options

Next/Previous Button Text: Lets you customize the “Next” and “Back” buttons for that block.



Tip: If your last question is in a separate block at the end of your survey, you can change the “Next” button text to “Submit,” so respondents know they have reached the end of the survey. In addition, if you put your survey intro in a block separate from the questions, you can change the text of that “Next” button to “Begin Survey.”

Move Block Up/Down: Moves the selected block up or down the order.

Survey Flow



Block: This adds another block below an existing one.

Branch: Displays block only if selected criteria is met.

Embedded Data: any extra information you would like recorded in addition to the question responses.

Authenticator: Only allows users in your contact list to answer the survey.

End of Survey: Terminates the survey and records all data up to that point.

Distributions **Distributions Tab**

Use this tab to activate and distribute your survey to collect responses. Note: if you do not have distribution rights, the Distribution tab will not be present when you log into Qualtrics. You must submit paperwork to be able to distribute your survey.

Anonymous Link: Allows you to collect responses anonymously.

Email Survey: Use to send an email with a unique survey link to respondents in your contact list.

Social Media: Use to share the survey on various social media platforms.

Pause Response Collection: Disables your survey so it no longer collects new responses.

The survey can be activated again when you are ready to collect new responses.

Data & Analysis Tab

Use this tab to manage and analyze individual responses.

Data: Displays the collected responses from the survey and gives you the ability to filter responses, delete responses, and export data.

Text: Search and categorize your text responses into topics.

Cross Tabs: Create a contingency table to determine statistical relationships between multiple variables.

Reports Tab

Use this tab to view results from survey respondents, create reports, and download survey data.

Default Report: Review a report of your survey results that includes tables, graphs, and statistics.

Export Report: Download survey reports as a PDF document, Word document, Power Point Slides, or CSV (Excel) file.

Publish Report: Create an interactive report of your survey to publish online.

Schedule Report Email: Allows you to send a copy of your report to a contact list on a recurring basis.

Response Counts	
Total	Filtered
7	7

- View Cross Tabs
- Manage Public Report...
- Export Report... >
- Rename Report...
- Schedule Report Email...
- Global Options...

- Hide All Pages

- Delete Report...

Reports Options

View Cross Tabs:

Create and view cross tabulation results between your survey questions and respondents' answers.

Rename Report:

Edit your report name.

Delete Report:

Allows you to delete an entire report (including all filters).

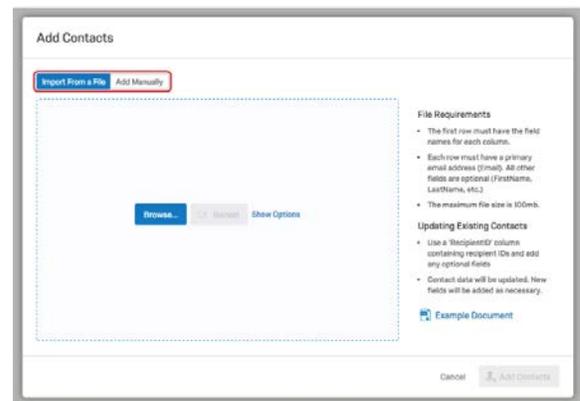
Contacts Tab

This tab is where you can upload and manage distribution lists.

Import From a File: Import an existing contact list from your computer.

Add Manually: Manually enter contacts' information in the given spreadsheet on Qualtrics.

Import From a Survey: Be able to select contacts from an existing survey.



Add Contacts

Import From a File | Add Manually

Browse... | Cancel | Show Options

File Requirements

- The first row must have the field names for each column.
- Each row must have a primary email address (Email). All other fields are optional (Firstname, LastName, etc.).
- The maximum file size is 100mb.

Updating Existing Contacts

- Use a 'RecipientID' column containing recipient IDs and add any optional fields.
- Contact data will be updated. New fields will be added as necessary.

Example Document

Cancel | Add Contacts

Library Tab

Use this tab to view the Qualtrics libraries or add questions, surveys, and graphics to another library.

Survey Library: Copy a survey to a library.

Graphics Library: Upload a graphic to a library.

Files Library: Upload non-image files to a library.

Message Library: Create messages for survey invitation emails, thank-you emails, reminder emails, and end-of-survey emails.

Additional Resources

For additional help, documentation, tutorials, and training visit *Qualtrics University* or contact our support team.

- “Help and Tutorials,” button accessible in Qualtrics to Qualtrics Survey University
- Email the IR Survey Team at ir-qualtrics@csustan.edu
- Call Qualtrics Support at 800-340-9194 or email support@qualtrics.com

Help & Feedback

Become an Expert

Visit Qualtrics University for tutorials, webinars, online training and more.



Visit Qualtrics University

Explore the Qualtrics Insight Platform

Contact Us

I have a technical question/issue

I would like to request a feature

I want to give feedback