qualtrics

User Guide

RIT | National Technical Institute for the Deaf
Professional Development

Table of Contents

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October 2020

Screenshots from Qualtrics surveys and Qualtrics Support tutorials.

Part I -

Basic Survey Techniques

Introduction

Qualtrics is an online tool for creating surveys, analyzing data, and reporting results. All RIT students, faculty, and staff may use Qualtrics by logging into their RIT account.

Course Objectives

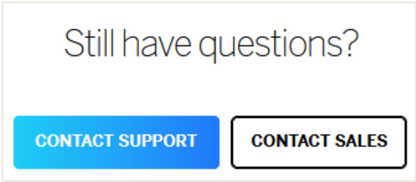
In this course, you will:

- Navigate through the Qualtrics survey platform
- Create and edit surveys
- Set survey options
- Distribute surveys
- Create and edit reports

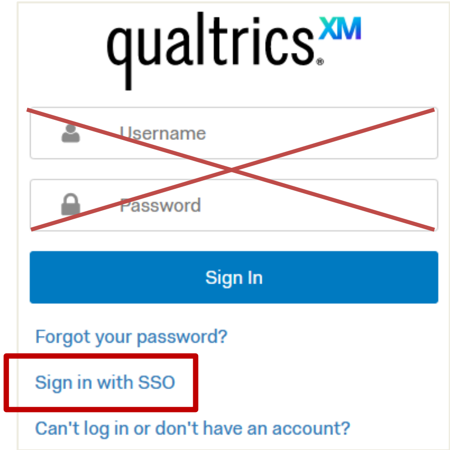
Getting Help with Qualtrics

RIT has contracted with Qualtrics to provide general support. For help, visit the Qualtrics Support site at https://www.qualtrics.com/support or click **Help** from the Qualtrics menu.

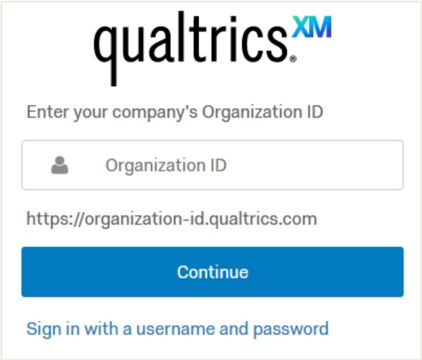
You can type in a topic to search for or scroll down to the Contact Support option.



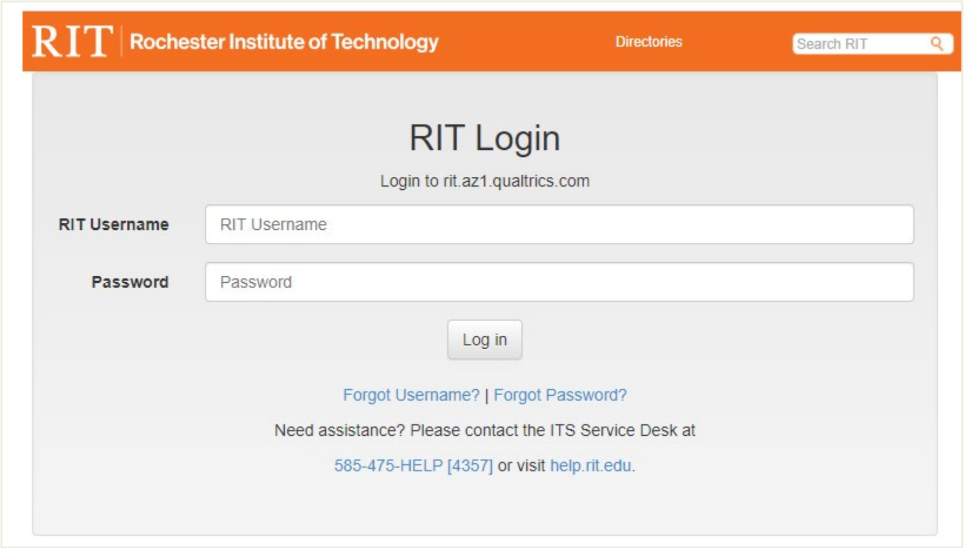
After clicking Contact Support, you must log in via the "**Sign in with SSO**" link. Do not use the username and password options:



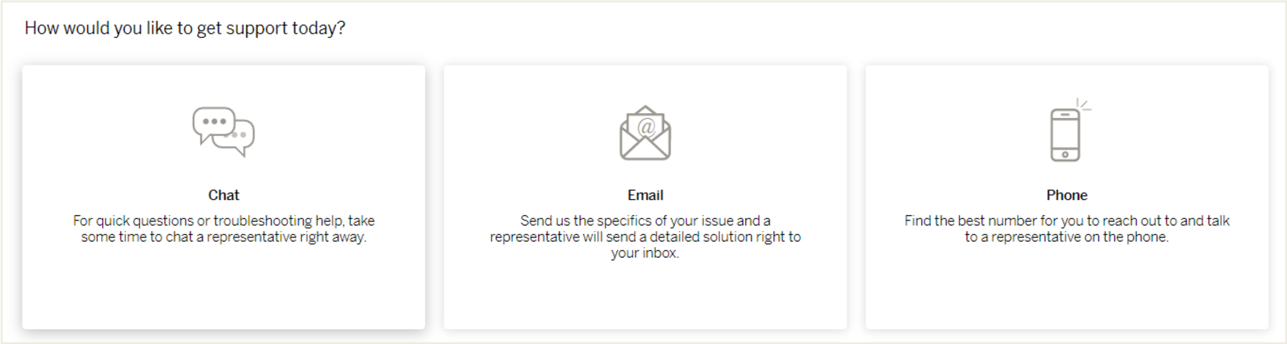
Type "**rit**" for the Organization ID and click **Continue**.



If you are not logged in to your RIT account, you will be presented with the Shibboleth log-in screen. Enter your **RIT Username** and **Password**:



Help is available via **Chat**, **Email**, or **Phone**:



NOTE: **Videos on this site are not captioned!**

RIT faculty can request training from Academic Technology Support of the Innovative Learning Institute (ILI). See http://www.rit.edu/tls/support for contact information.
Live chat is available.

Lesson 1 - Creating Surveys

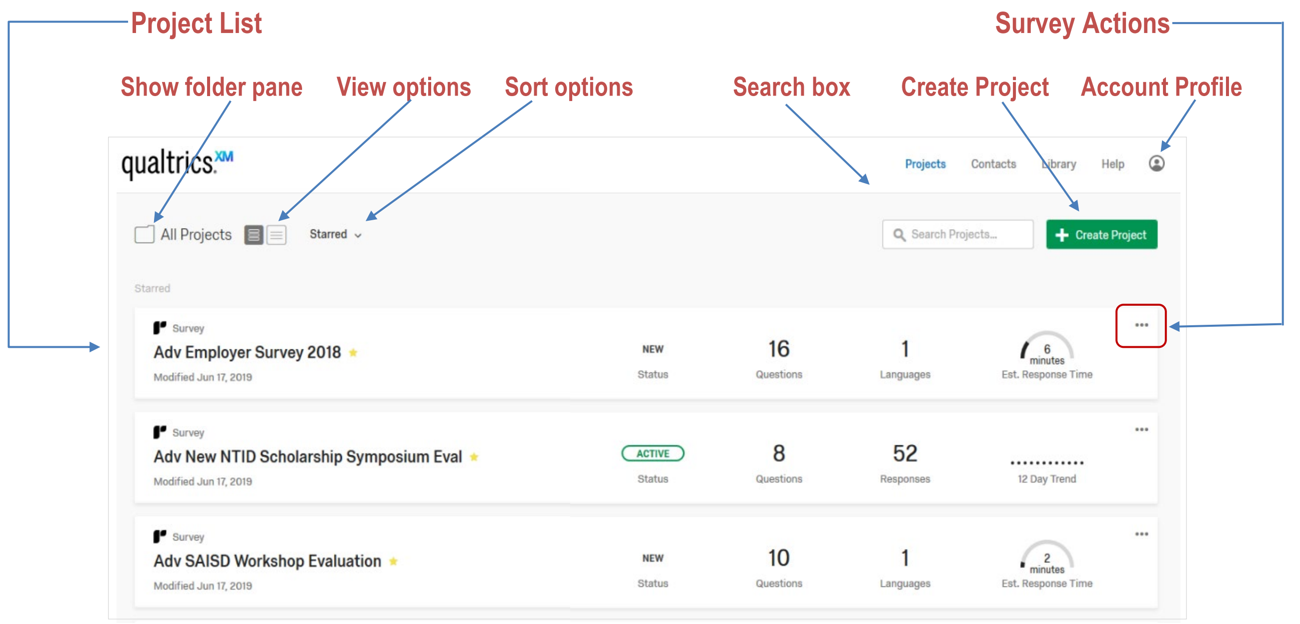
I. Log into Qualtrics

To Log into Your RIT Qualtrics Account

1. Open a browser and go to http://rit.qualtrics.com.
2. Enter your RIT **username** and **password**.

II. Navigate in Qualtrics

In Qualtrics, surveys are referred to as 'projects.' The project list screen may vary depending on if you have previously logged in to Qualtrics:



Example Main Project List screen

NOTES:

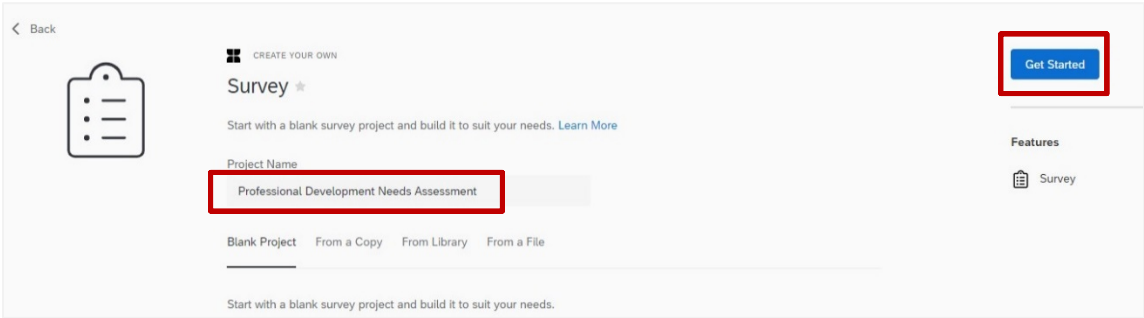
- After responses have been received, the Languages number will change to the number of responses.
- In the compressed project list view, you can click the column headers to sort the column.
- To mark a project as a favorite, click the star icon next to the survey name.
  To bring starred surveys to the top of the project list, choose **Starred** from the **Sort by** dropdown.
- Use the Search box to quickly locate a survey within the current folder.
- Account profile - here you can **log out** or use **Refresh Account** to refresh the screen.

III. Create a New Survey

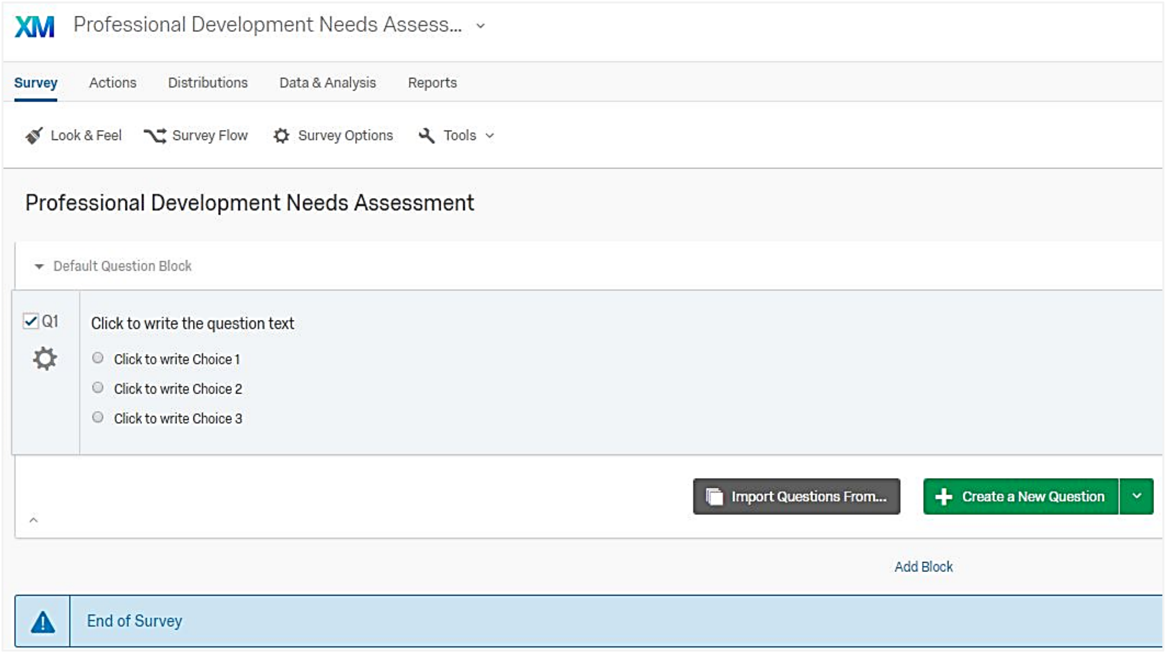
To Create a Survey

1. Click the **Create new project** button.
2. Click the **Survey** button 

3. Enter a **Project Name** and click **Get Started**.



4. The survey screen will appear.



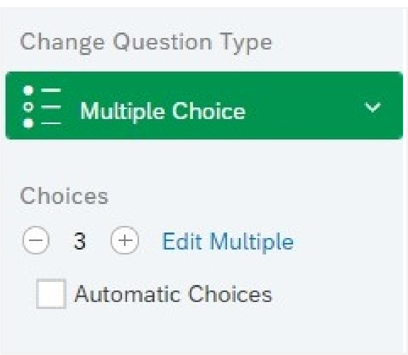
You can click directly on the text on the screen to change the Survey Title, Title of Question Block, Question Text, etc.

Survey Toolbars and Tabs

There are several toolbars with tabs at top of the survey screen. There are tabs for **Survey**, **Actions**, **Distributions**, **Data & Analysis**, and **Reports** and additional subtabs for **Look & Fee**l, **Survey Flow**, **Survey Options**, and **Tools**.

IV. Add and Edit Questions

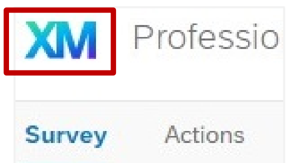
When you create a new survey, a multiple choice question appears by default, with three answer choices.



- You can begin editing this question by clicking on the text and typing over it. When you are in edit mode, the question options appear on the right. Here you can change the question type, number of choices, position, and validation options and perform actions such as add a page break and copy/move questions.
- See Appendix C for a description of Question Types.
- Changes are automatically saved as you go along. However, some windows for setting options require you click the Save button at the bottom of the window.

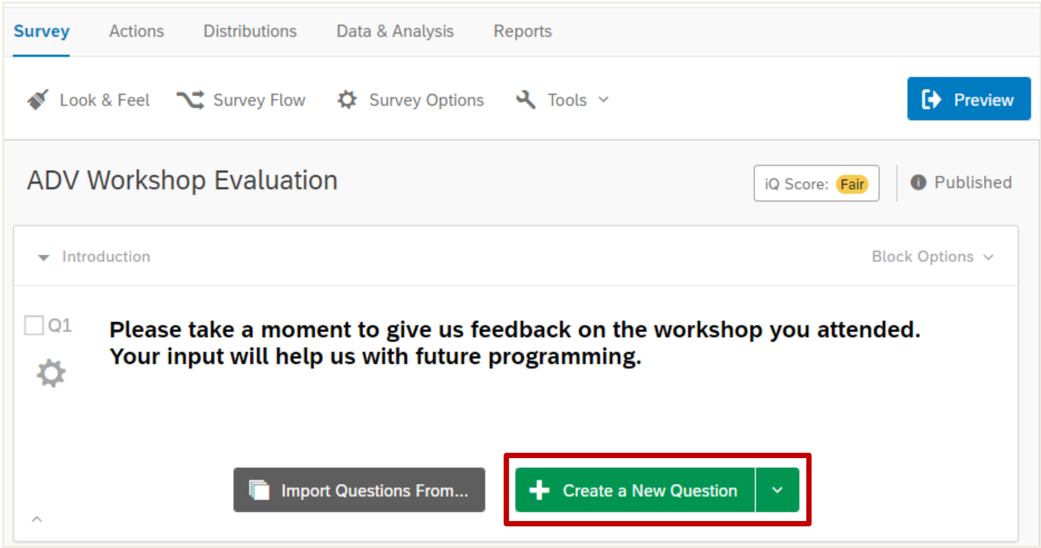
NOTE: To edit a survey from the main Project List, click on the survey name and the survey will appear.

To return to the main project list, you can click on the **XM** logo.

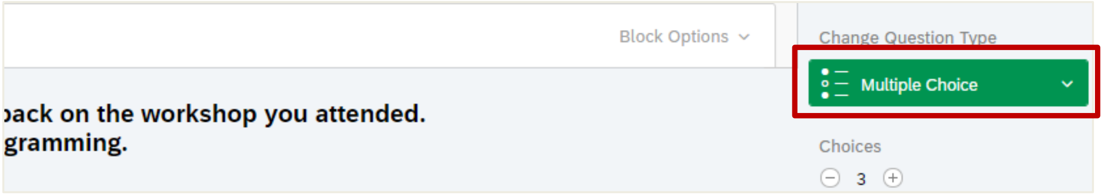


To Add a New Question

1. Click **Create a New Question**.



2. If desired, change the question type by clicking the dropdown arrow under **Change Question Type** and selecting the desired question type.



3. Click on any text to begin editing your question or choices.

> To add another question, mouse over an existing question and click the green plus (+) button (either above or below the existing question), or you can click **Create a New Question** again.

Delete a Question

1. Mouse over the question.
2. Click the red **minus** sign that appears to the right of the question.

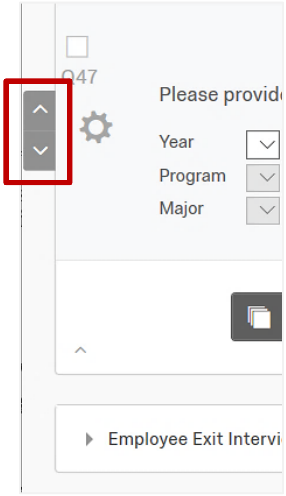
> When you delete questions, they are kept in the **Trash/Unused Questions** area at the bottom of the screen. You can restore questions, permanently remove them individually, or click **Empty Trash** to permanently remove all unused questions.

To Restore a Deleted Question

1. Click **Trash/Unused Questions** located at the bottom of the survey.
2. Select the question you would like to undelete.
3. Click **Restore**.

To Move a Question Up or Down

1. Hover over the question you want to move.
2. Use the gray **arrows** on the left of the question to move the question up or down.



To Move a Question to Another Location in the Survey

1. Select the question you want to move by clicking on the box next to the question number.
2. Click **Move Question** in the options pane to the right.
3. The question will now be highlighted in blue.
4. Move your mouse to where you want to move the question.
5. Click where you would like the question to be placed.

Copy Question

You can copy questions into a survey from other surveys or from the Qualtrics Library.

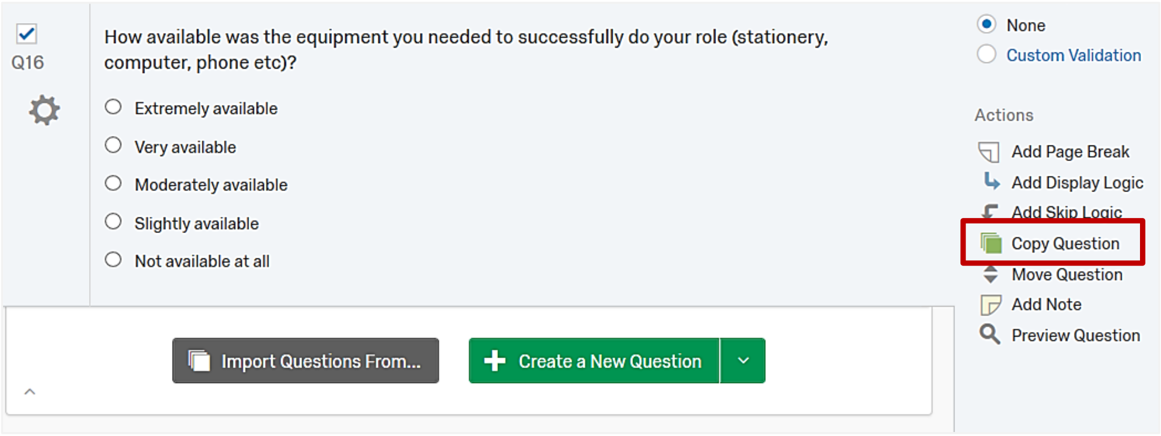
Do this by clicking on the question you would like to copy (the question will turn blue) and then clicking on the **Copy Question** option on the bottom right (on the Question pane).

To copy a group of questions, you can either select them by checking each checkbox near the top left of each question, or by clicking on a question and using **Ctrl+click** (or **Cmd+click**) to select additional questions individually.

You can also use **Shift+click** to select a large number of questions all at once. To do this click on the first question in the list, hold down **Shift+click** then click on the last question in the list of questions you would like to copy. Options that can be applied to multiple questions will appear on the right. Click the **Copy** button and you will copy all of the questions into your survey. These copied questions will show up below the original questions in the survey.

To Copy a Question from Your Current Survey

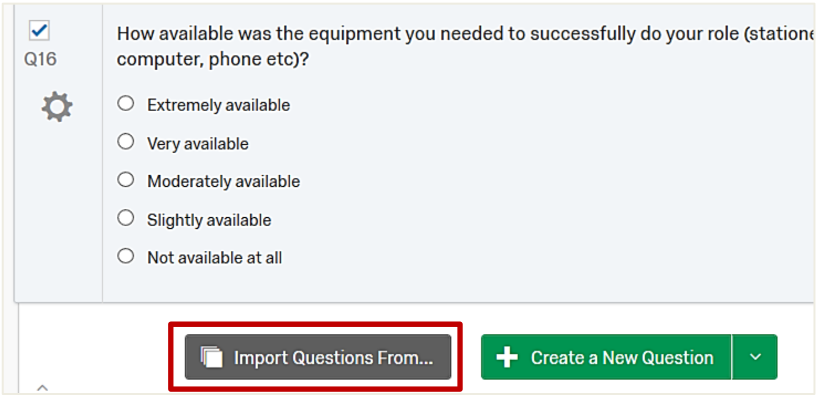
1. Click on the question you want to copy to select it.
2. Click **Copy Question**.



> The copy will appear under the original question.

To Copy a Question from a Previous Survey

1. Click the **Import Questions From** button at the bottom of the question block.



2. Select **My Surveys**.
3. Select the survey you want to copy the question(s) from.
4. Click the question(s) you would like to copy and click **Import Question**.
   NOTE: You can click on multiple questions to select them.
5. Click the **Import # Questions** button.

Add Note

Add Note lets you add a note for your own reference, or for others who are editing the survey. Notes are not visible to the respondents.

To Add a Page Break

Page breaks divide questions into separate pages. This is particularly useful for dividing long surveys into manageable chunks. The respondent must click the **Next** button to continue to the next page. To add a page break:

1. Click the question you want the break to appear after, then click **Add Page Break** from the question options pane on the right.
2. Click **Add Page Break**.

If you want a specific number of questions per page throughout a survey, use the Questions Per Page option under Look and Feel on the Edit Survey tab. Look and Feel Options are discussed on page 23.

Preview Question

Preview Question shows you how the question will look without you having to click through the survey to preview it.

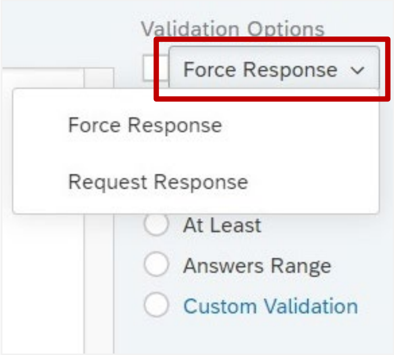
- To **preview the entire survey**, click **Preview Survey** at the top of the Edit Survey tab.
- To **preview a question block**, click **Block Options** and select **View Block**.

To Add Validation

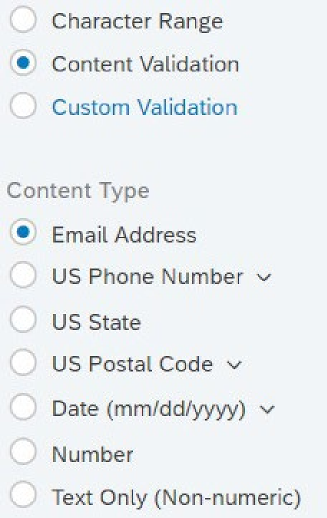
Validation ensures the responses meet the requirements you set. Validation options vary with each question type and can be viewed in the question options pane to the right when a question is selected.

- **Force Response** - Select Force Response to make a question required. Respondents must answer the question before proceeding to the next page.

  Force Response also can be applied simultaneously to multiple questions. Select multiple questions by checking the check box next to each question, then select **Force Response** in the group of options to the right.



- **Request Response** - This option informs respondents they did not answer the question, and allows them to choose whether to answer the question or not.
- **Content Type Validation** - Content Type Validation is available for single line text fields. Content types include Email Address and Date:



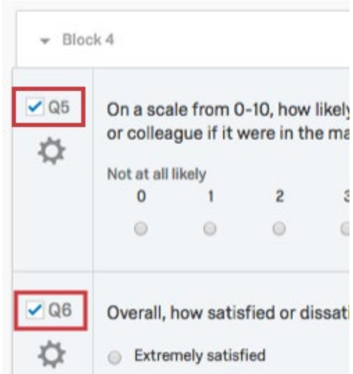
To Perform Actions on Multiple Questions

Actions, such as Copy or Move, can performed on a group of questions by selecting multiple questions and applying the action.

To Select Multiple Questions

There are three ways to select multiple questions:

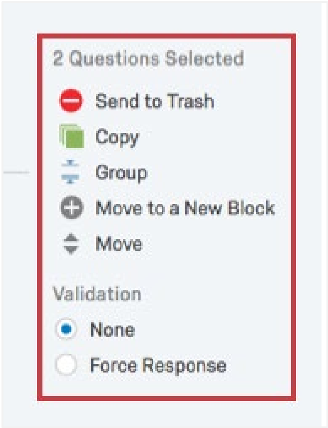
- Click the **checkboxes** on the left of the questions you want to select:
- Hold **Ctrl** (or **Cmd**) and click the questions you want to select.
- Click the first question you want to select, hold **Shift**, and then click the last question you want to select. This will select all the questions in the range.



Once you have selected multiple questions, a list of group actions will appear to the right of the questions.

- **Send to Trash**: Delete the selected questions. Deleted questions will be stored in the Trash/Unused Questions area at the bottom on the screen until the trash is emptied.
- **Copy**: Copy the selected questions. The questions will be copied under the currently selected questions.
- **Group**: Bring questions from various locations in the survey together into one location. Grouped question are moved below the last selected question.
- **Move to a New Block**: Move the selected questions to a new block. The block will appear at the end of the survey.
- **Move**: Move the selected questions to another location.

  Notice, it shows the number of questions you are about to move. The questions will now be highlighted in blue. Move your mouse to where you want to move the questions, then click to insert the questions.



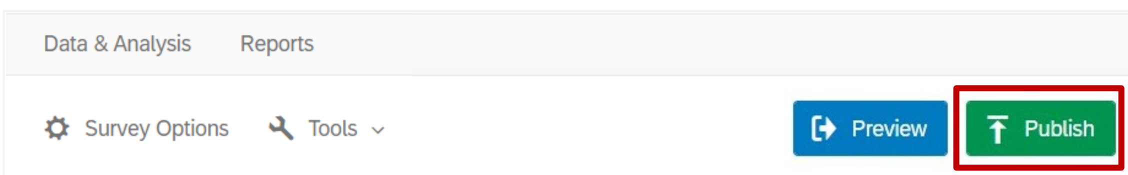
V. Preview Survey

As you are developing your survey, you can click the **Preview Survey** button to see how the survey will appear to respondents. The preview shows a desktop version and mobile version.

➲ **IMPORTANT!** If you click through and answer questions in your preview survey, a response will be recorded. **Before collecting data, you must delete these responses from the Responses page in the View Results tab, so they will not be included in the final data**. See page 31 for instructions for removing the preview data.

VI. Publish Survey

- When you have completed your survey design, click the **Publish** button on the survey toolbar to make it active and open to responses.



- When you confirm publishing, a message appears indicating the survey has been activated. You can copy the anonymous link and use it to distribute the survey.

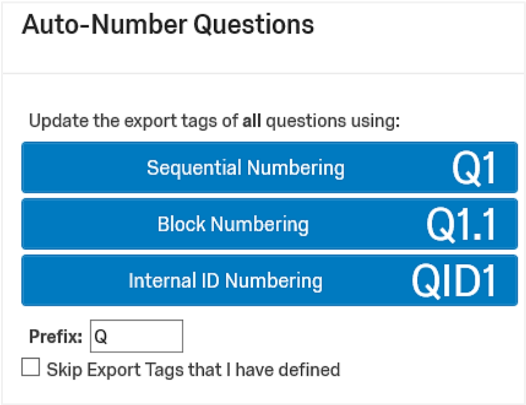
➲ **IMPORTANT!** If you edit your survey after it has been distributed, the changes will not go live until you re-publish the survey.

VIII. Auto Renumber Questions

You can renumber questions individually by typing over the exiting number (such as Q9). However, this can be a tedious process if there are several questions and you change the order of the questions. You can save time by automatically renumbering the questions after you have completed your survey design.

To Automatically Renumber All Questions in a Survey

1. From the **Tools** dropdown, click **Auto-Number Questions**.
2. Click **Sequential Numbering**.



➲ **IMPORTANT!** Remember to auto renumber your questions before publishing your survey.

X. Create Question Blocks

Blocks are used to organize survey questions. Blocks are particularly helpful for organizing long or advanced surveys. They are also very useful for setting survey flow options (such as branching, or skipping to a particular group of questions) and applying logic. For simple surveys, you will probably only need the Default Question Block.

You can collapse a block by clicking on the down arrow to the left of the Default Question Block label. Also, you can rename the block by clicking on the block name and typing in a new name.

Examples of Surveys Organized in Blocks

The Workshop Evaluation survey has questions organized into the following blocks:

- Introduction
- Instructor
- Training Content
- Time Preference
- Comments

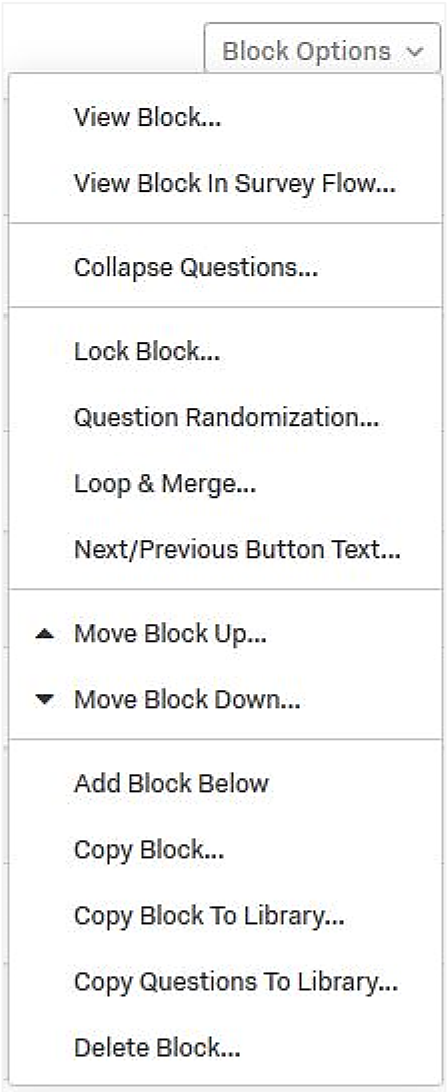
The 2021 NTID Symposium Proposal has 38 questions organized in several blocks:

- Introduction
- Presenter 1 Info
- Additional Presenters
- Author Info
- Presenter 2-5 Info (separate block for each presenter)
- Project Assistants
- Presentation Type
- Presentation Category
- Abstract
- Technical Needs
- End

Block Options

The Block Options drop-down menu is located at the top-right corner of the block.
To preview a single block of questions, click **Block Options** and select **View Block**.

The following options are available:



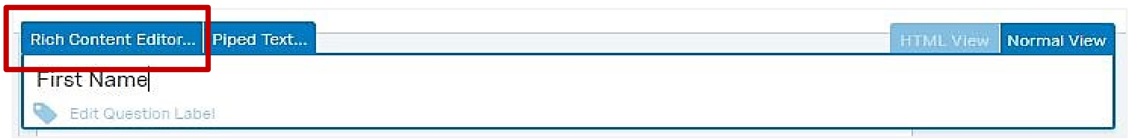
- **View Block, Add Block Below, Copy Block, Delete Block**
- **Collapse Questions** - minimizes the view of the question and answer choices.
- **Lock Block** - prevents a block from being edited.
- **Question Randomization** - randomizes questions or presents a subset of questions within a block.
- **Loop & Merge** - loops the respondent through a block of questions for each option they chose from a multiple response question. See page 97 for more information about Loop & Merge.
- **Copy Block to Library** - copies an entire block of questions to your Question Library for later reuse.
- **Copy Questions to Library** - copies specific questions from your Question Library for later reuse.

IX. Format and Edit Text with the Rich Content Editor

The Rich Content Editor provides formatting options for your survey text.

<u>To Use the Rich Content Editor</u>

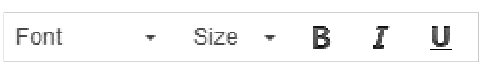
1. Edit survey text by clicking directly on the text and making the changes in the text box. When in editing mode, the Rich Content Editor tab will appear:
2. Click on the **Rich Content Editor** tab to open the editor.



3. Highlight the text you want to edit, then select an option on the Rich Text Editor toolbar. If only one row of toolbars appears, click the *More* ... button.

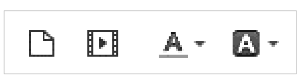
 Insert Piped Text - insert text into the survey from other questions.

 Insert graphic - insert graphic from the Graphics Library or upload a new one. Valid file types: .png, .gif, and .jpg/.jpeg.



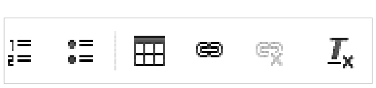
Change Font Name, Font Size; format text with bold, italic, underline.

 Source - display the HTML source code for the survey.

 Insert File, Insert Media; Text Color, Background Color.

- Accepted media types include: MP3 and MP4.
- You can insert videos from your File Library, upload a new file, or enter a URL.

 Align text (left, center, right); Undo/Redo changes; Decrease/Increase Indent.

 Insert/Remove Numbered or Bulleted List; Insert Table; Insert Link, Remove Link, Remove Format.

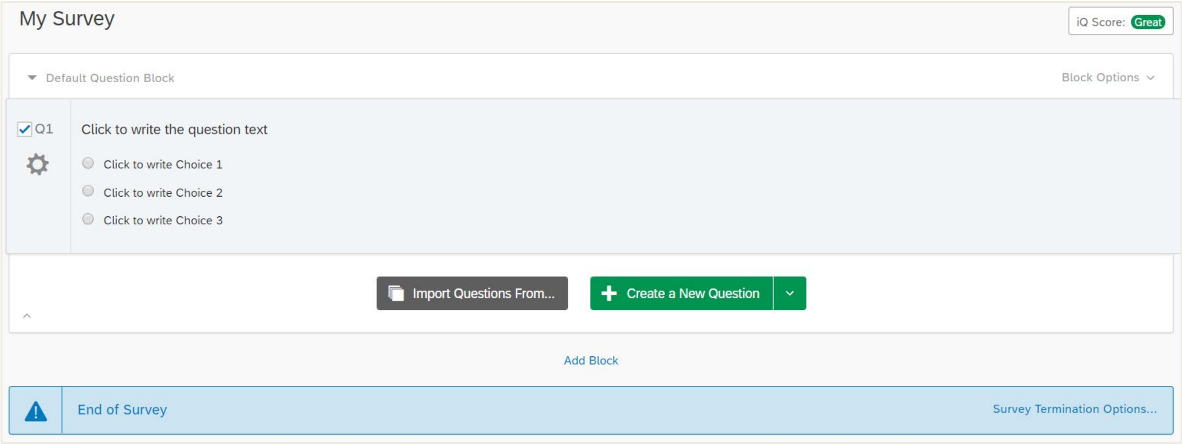
Rich Content Editor formatting options

Exercise 1 - Create a Survey

In this exercise, you will create survey with a multiple choice question and a text entry question.

1. Click the **Create new project** button.
2. Click the **Survey** button
3. Enter a **Project Name** and click **Get Started**.

   > The survey screen will appear.

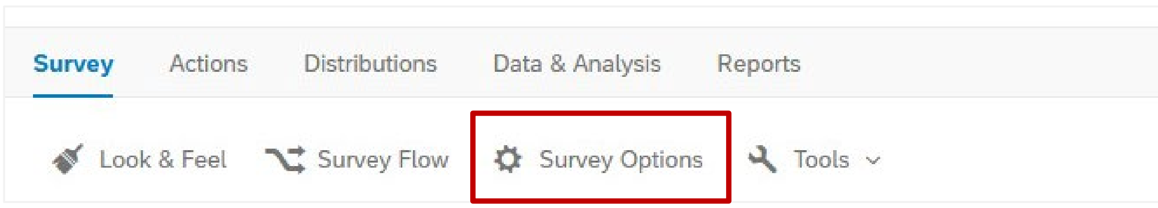


4. Click on the question to enter edit mode.
5. Edit the text on the default question.
6. Add a single **Multiple Choice** question with at least 4 choices:
   a. Choose **Automatic Scale Points** – select a scale
7. Add a **Text Entry** question:
   a) **Choose Text Type options** (such as Single Line or Multi Line), Validation Options, Validation Type, etc.
8. **Preview** the survey.

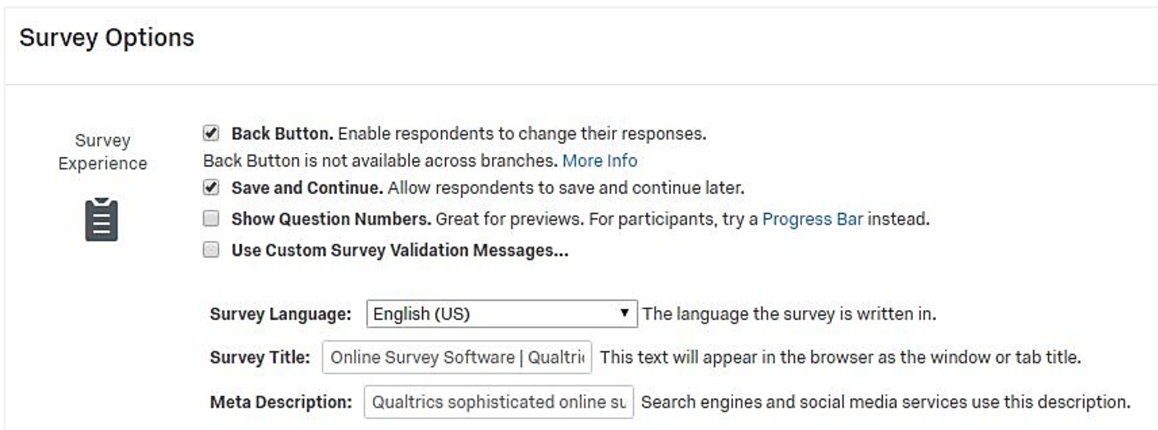
Lesson 2 - Setting Survey Options

There are numerous options for customizing the survey experience, protecting surveys, and terminating surveys.

Survey Options are accessible from the survey toolbar:



Survey Experience Options



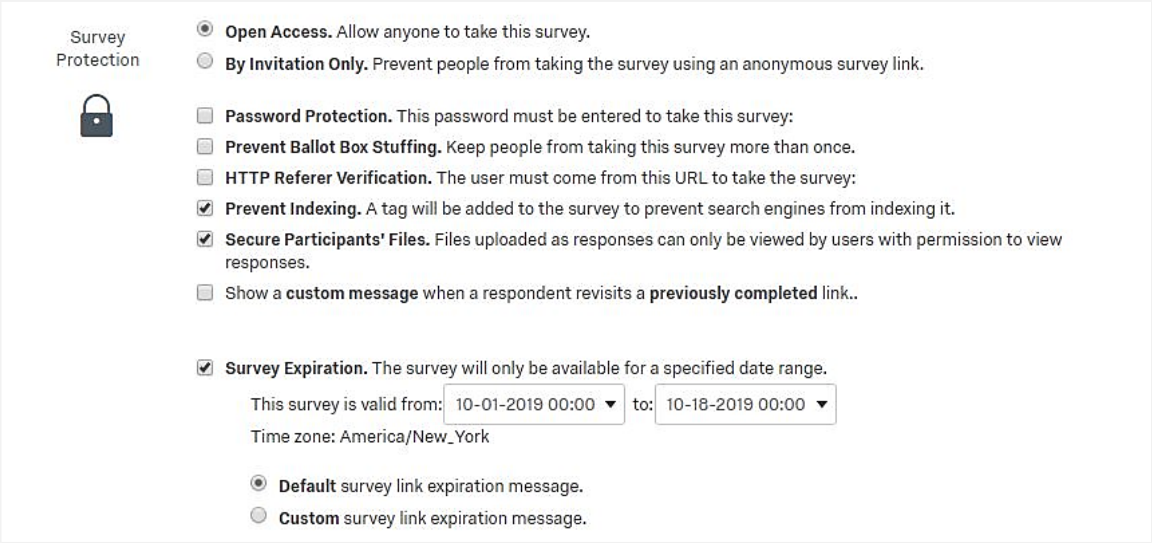
- **Back Button** - enables respondents to return to the previous page and change their responses.
- **Save and Continue** - allows respondents to save and continue later.
- **Survey Title** - sets the text that will appear in the browser window or tab title.

Activate the **Back Button** for your surveys so respondents can change their responses.

For long surveys, allow **Save and Continue**.

Survey Protection Options

Survey Protection options control how surveys are accessed:

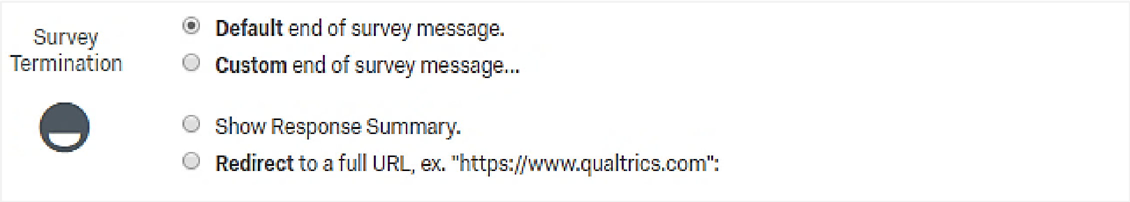


Commonly-set options include:

- **Open Access/By Invitation Only** - controls who has access to the survey.
- **Prevent Ballot Box Stuffing** - prevents respondents from taking survey more than once.
- **Survey Expiration** - sets dates for the survey to automatically open and close.

Survey Termination

Survey termination options define what should happen when respondents submit a survey. You can select the default end of survey message, choose a custom message, or redirect respondents to another webpage. Also, you can show respondents a summary of what they submitted.



- **Default end of survey message** - The default end of survey message is: "*We thank you for your time spent taking this survey. Your response has been recorded.*"

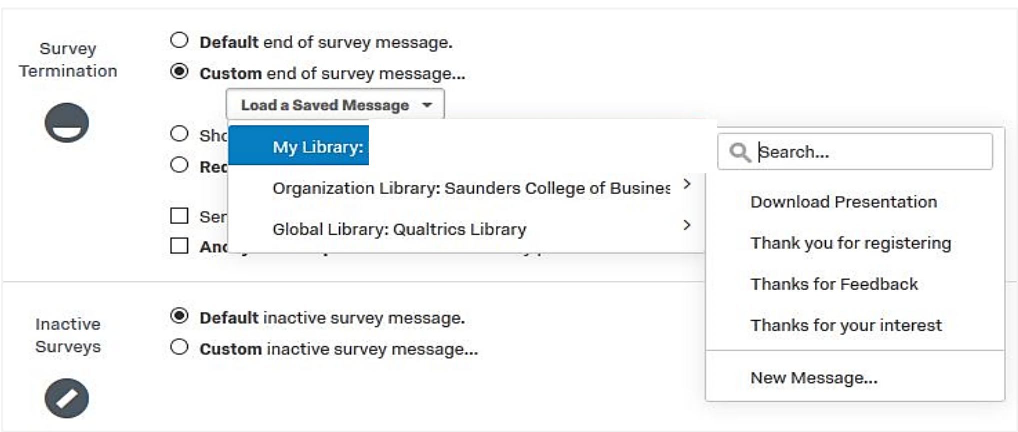
- **Show Response Summary** - redirects the respondent to a report that displays their responses. The respondent can then export the report as a PDF.
- **Redirect to a full URL**, for example, you can enter "http://www.ntid.rit.edu" to send respondents back to NTID's home page.
- **Send additional thank you email from a Library** - this is only available if you use the Survey Mailer to distribute the surveys.

If a survey is inactive (has been closed), the default message is *"Thank you for your time, unfortunately this survey has been closed."*

➲ **IMPORTANT!** Once a survey session has been closed, it cannot be reopened.

Create a Custom Survey Termination Message

1. Click the **Survey Options** tab.
2. Scroll down, if necessary, then click **Custom end of survey message**.
3. Click the down arrow next to **Load a Saved Message**.
4. Click on **My Library** … then click **New Message**.



5. Enter the text in the editor.
6. Click the **Save** button at the bottom of the screen.
7. Enter a description (this will become the name of your custom message).
8. Compose the message in the **Create a New Message** window.
9. Click **Save**.

Your custom message will be saved into your Message Library and it will be available from the **Custom end of survey message** dropdown for future surveys.

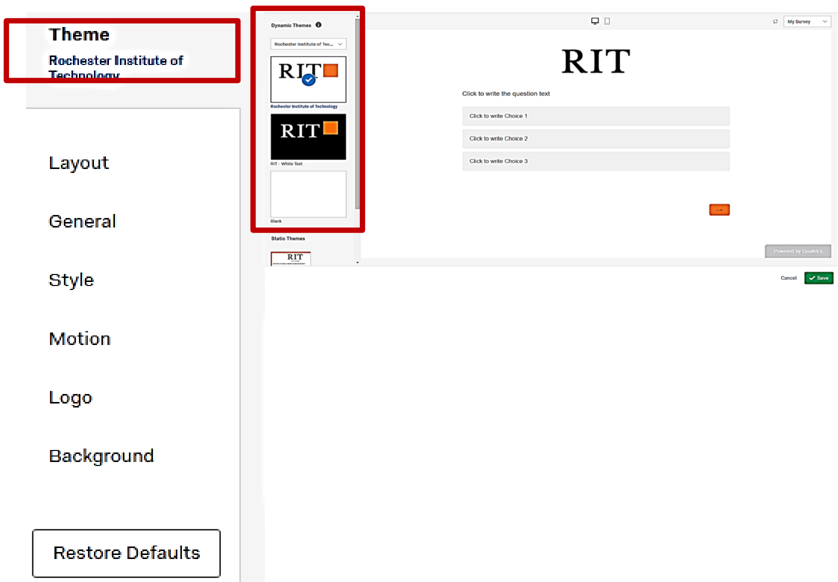
You can preview your survey to see how the end of survey message will appear.

Changing the Look and Feel Options

Look and Feel Options let you change the theme, layout, background color, logo, and background image for your surveys.

To Change Look and Feel Options

1. Open a survey and click the **Look & Feel** tab.
2. Click **Theme**, then click on a thumbnail for a theme to select it, if necessary.



3. Set the options:
   - **Layout**

     There are three layouts to choose from:

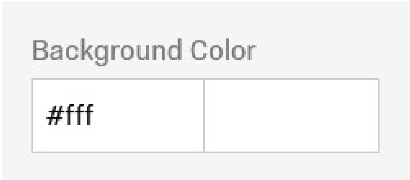
     - Flat, Modern, or Classic

   - **General**
     - **Next/Previous Button Text** - you can type text next to the arrow (→) and it will appear on the button.

       To use a different label for the Next button at the end of the survey, you can put the last page of your survey in a separate block and use the block options to change the Next button text. For example, the last button can say “Submit” instead of “Next” so respondents will know they have reached the end of the survey.

    - **Progress Bar** - shows the respondent what percentage of the survey has been completed. This is helpful for long surveys.
        - **With** or **Without Text** - displays the button as left/right arrows by default, but you can choose to also display text.
    - **Questions Per Page** - you can set a specific number of pages to appear on each screen.
    - **Header/Footer** - lets you add text that will appear on top/bottom of each page.
        - To add formatting to the header/footer, click the edit button and make the desired changes in the Rich Content Editor.
        - The header/footer only applies to the current survey.

- **Style**
  Lets you use custom cascading style sheets (CSS).
- **Motion**
  Provides options for Page Transition such as Slide, Fade, Flip and Autofocus to zoom in on the current question.
- **Logo**
  Use the default logo (RIT) or upload your own by clicking **Change Image**.
- **Background**
  Here you can change the background color or insert an image to use as a background for the survey. Click on the white box to change the background color, or replace the hex code (#fff) with the desired code.



4. Click **Save**.

Reset Defaults

To reset the options to their original state, click the **Restore Defaults** button.

Exercise 2 - Set Survey Options

In this exercise, you will set survey options and a custom end of survey message:

1. Click the **Survey Options** button under the **Survey** tab.
2. Select the desired survey options and click the **Save** button at the bottom of the screen.
3. Set a **Custom End of Survey Message**:
   a. From the **Survey Options** window, click **Custom end of survey message**.
   b. From the **Load a Saved Message** dropdown, choose **My Library**: ...
   c. Select **New Message** and enter a **Description**.
   d. Enter the text in the editor.
   e. Click the **Save** button at the bottom of the screen.

      > Your custom message description will now be selected.

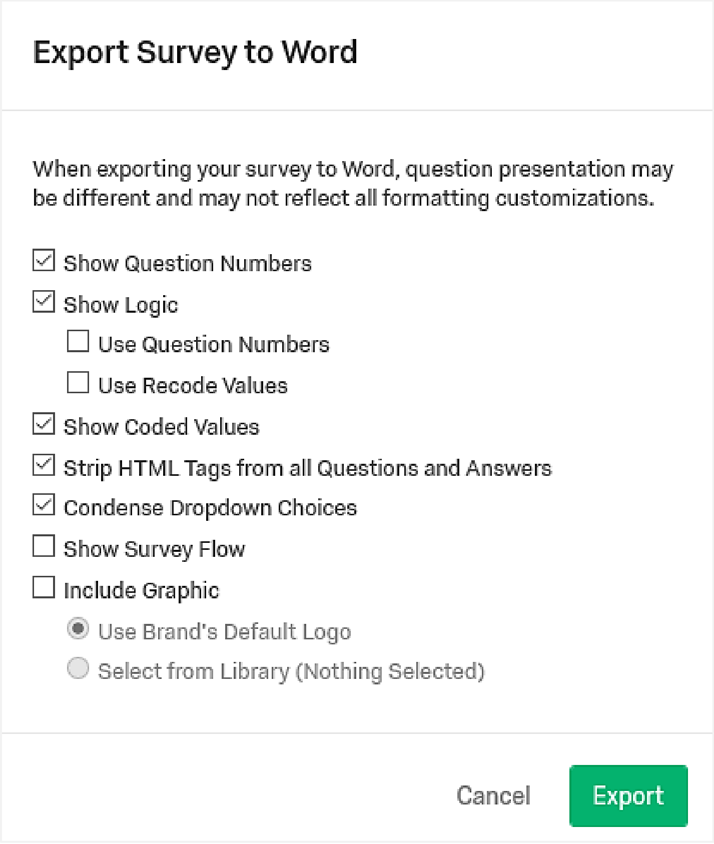
   f. Click **Save**.
   g. **Preview** the survey to test the survey options.

Lesson 4 - Printing Surveys

To Print a Survey

1. Click the **Tools** menu.
2. Select **Import/Export**.
3. Click **Print Survey**.

For a more detailed version of the printed survey, use the **Export Survey to Word** option. This version shows where you have added blocks and page breaks, and allows you to show the display logic and survey flow:



To Export a Survey to Microsoft Word

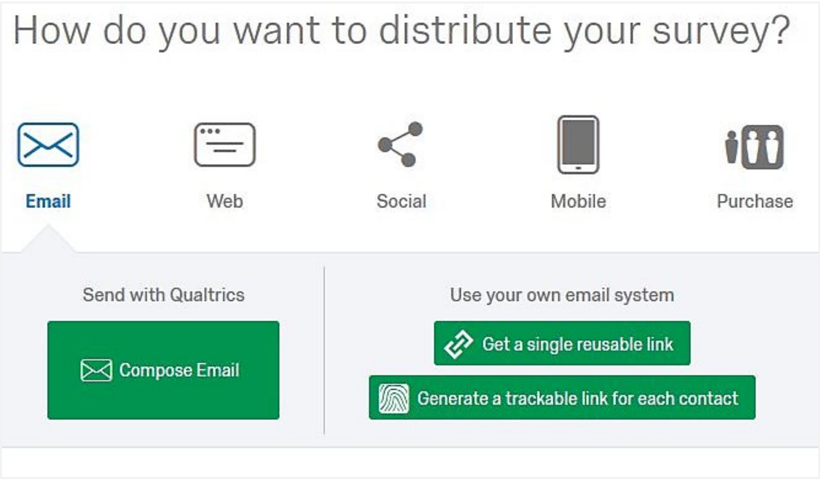
1. Click the **Tools** menu.
2. Select **Import/Export**.
3. Select **Export to Word**.
4. Select the export options and click **Export**.

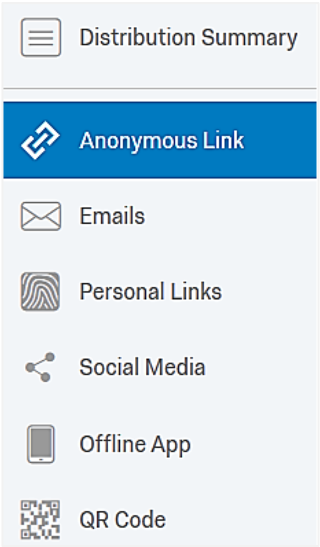
The .docx file will be saved to your default download folder.

Lesson 5 - Distributing Surveys

Distribution Methods

There are several methods of distributing surveys. After a survey has been published, options will be displayed on a pane on the left side of the screen.





- **Get a single reusable link** - Generates an anonymous link that you can send to respondents. You can copy/paste the link into an email message, or post link online to share).
- **Web -** Generates a link you can post to a website.
- **Mobile** - Generates a QR code that can be scanned by mobile phones.

Sample QR Code

- **Social** - Posts to Facebook, Twitter, LinkedIn, Pinterest, or Reddit.
- **Compose Email** - Sends via Qualtrics to a contact list you have set up in Qualtrics.
- **Purchase** - Allows you to purchase a contact list of respondents (such as for conducting a large study).

To Distribute a Survey

1. Open the survey.
2. Click the **Distributions** tab.
3. Select a distribution method: **Anonymous link** or **Get a single reusable link**.

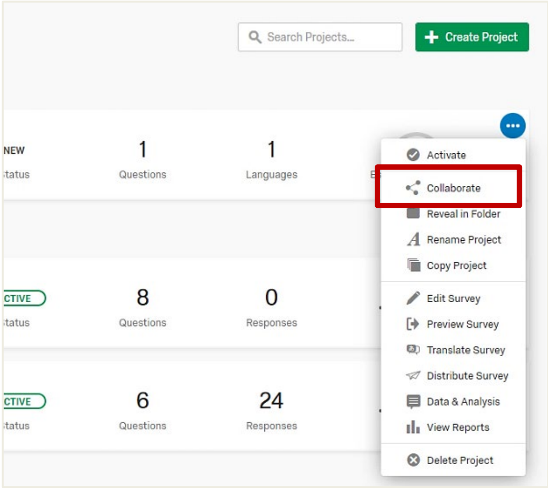
Lesson 6 - Sharing Surveys

You can share surveys by collaborating or sending a copy of a project to another user:

- **Collaborate** - lets you grant permission to other users to edit, distribute, view and analyze the results of shared surveys. You remain the owner of the survey and you can change or revoke privileges, or delete the survey. When you share a survey via Collaborate, the user receives an email message notifying them you have shared the survey.
- **Copy Project** - lets you send a copy of a survey to another user. The survey is a copy and is not linked to the original. With Copy Project, the survey will appear on the users Project list without notification.

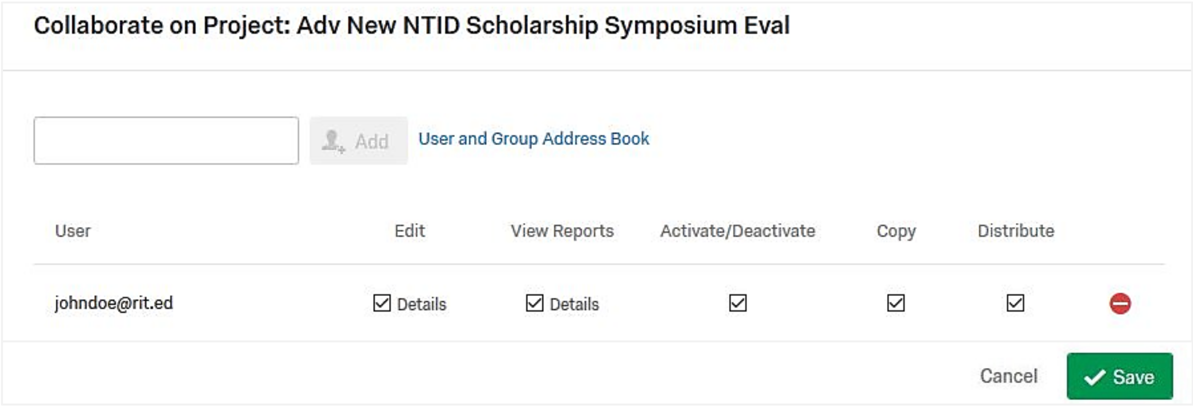
To Share a Survey

1. To share a survey, click **Collaborate** from the survey **Actions** dropdown menu.



2. In the text box at the top, start typing the full name or username of the person you want to share with. The individual's name and username will appear in this format: John Doe (jddadm#rit). If the name is not in the system, type in the email address and click the **Add** button.
3. An email inviation message will appear. Type in a custom message, if desired and click **OK**.

4. By default, all permission options are checked. Check/uncheck the options as desired to change/limit access.

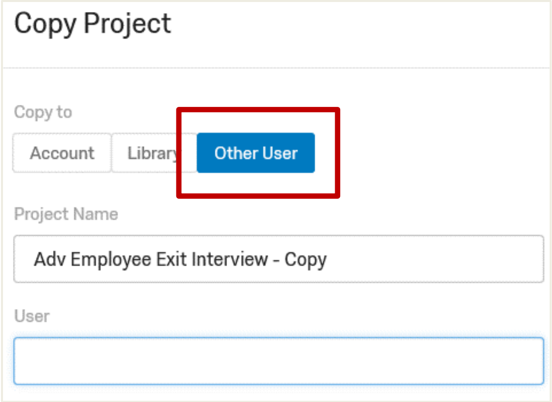


5. Click **Save**.

- **To revoke access,** click the **red minus sign** in the row next to the individual's access details.

To Send a Copy of a Survey to Another User

1. From the main Projects window, click the **Actions** button.
2. Select **Copy Project**.
3. Click the **Other User** tab.



4. Type in the **name** or **email**. If the individual is not in the system, you cannot send a copy to the user. You can use the Collaborate option described above with the user's email address.
5. Click **Copy Project**.

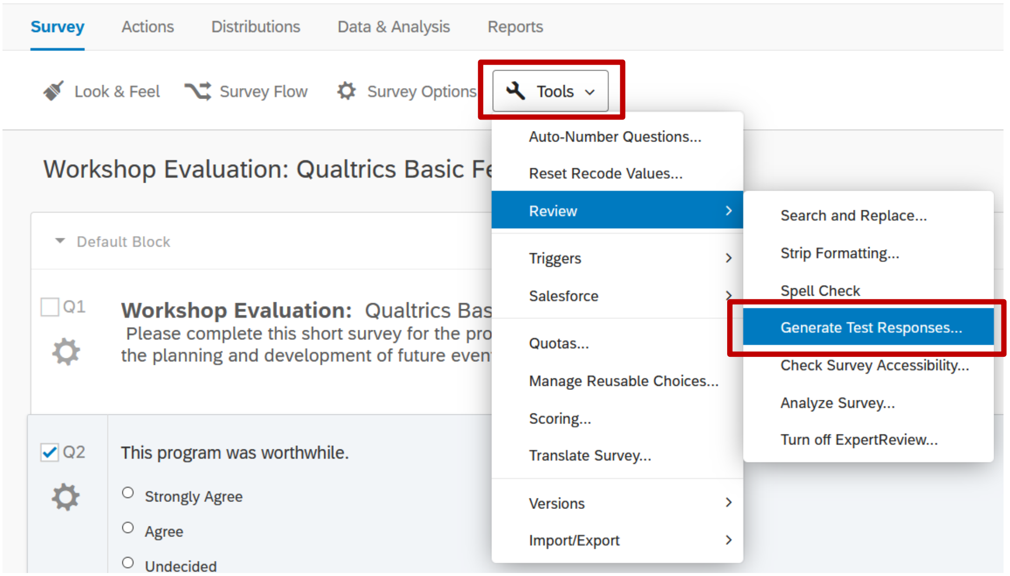
NOTE: The recipient will NOT receive a notification that you sent a copy of a survey; the survey will just appear on the user's project list.

Lesson 7 - Testing Surveys

The Test Survey feature allows you to add sample data into your survey to see how the results will appear.

To Generate Test Reponses

1. Open the survey and click the **Tools** tab.
2. Select **Review, Generate Test Responses**.

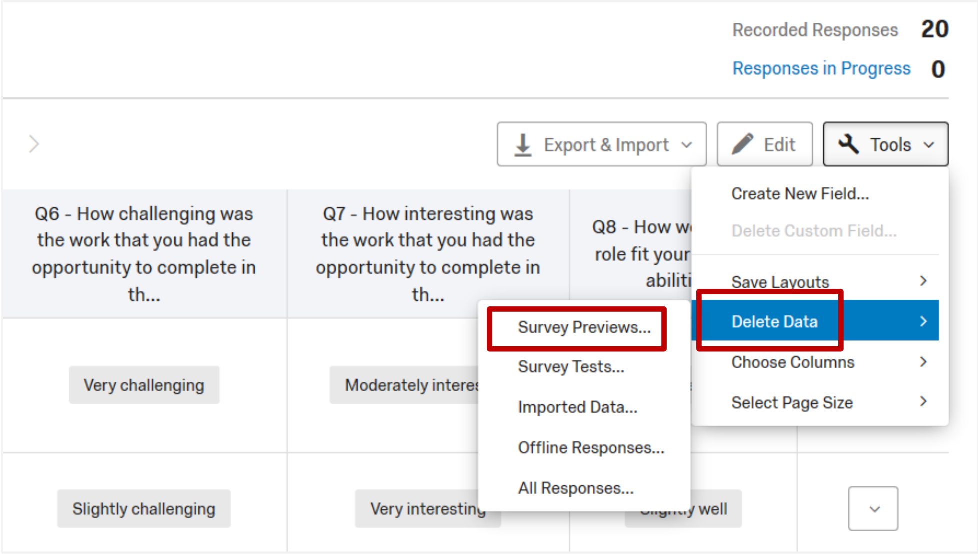


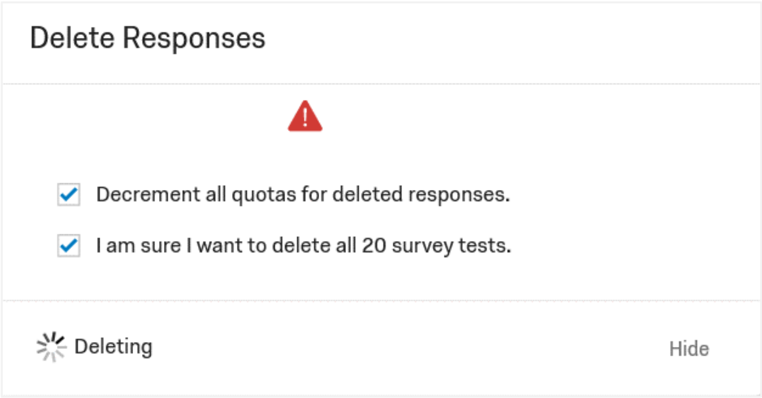
3. Enter the **number** of test responses you want and click **Start Test**.

Remove Test Data and Remove Preview Data

To remove data that was generated during a test or survey preview:

1. Click the **Data & Analysis** tab.
2. Click the **Tools** button.
3. Select **Delete Data**.
4. Select **Survey Previews** or select **Test Data**.
5. Check the boxes to **decrement quotas** and **confirm deletion** of responses.





If the screen does not refresh in a few seconds, refresh your browser (or reload the browser page).

Exercise 3 - Test, Publish, Distribute, and Share Survey

In this exercise, you will test the survey, view a basic results-report, and distribute the survey:

1. Test the survey (see instructions on page 30).
2. Add 20 responses.
3. View the **Results-Report**.
4. Make revisions to the survey, if desired.
5. Remove test responses (see steps on page 31)
6. Click **Publish**.
7. Click **Distribute**.
8. Select **Individual Link**.

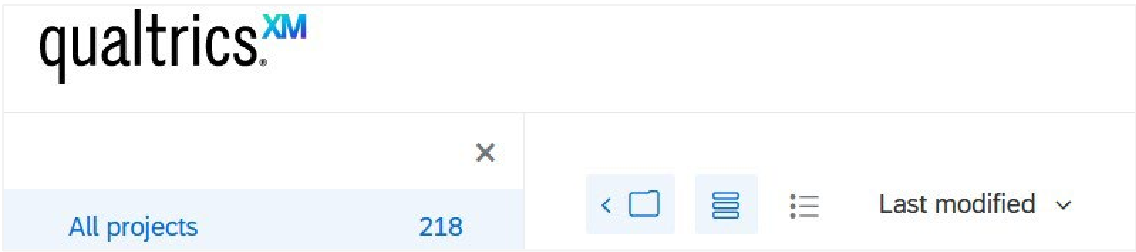
> Now you can copy the URL and paste it into an email message to send to potential respondents.

Lesson 8 - Using Folders

Folders can be used to organize your projects by categories. This is helpful if you expect to create many surveys. For example, you could organize your surveys by topics, years, departments, or audience.

To Use Folders

1. From the main projects list, make sure the folder pane is visible. You can click the folder icon to toggle the folder pane on and off. The icon will be highlighted in blue when it is activated.

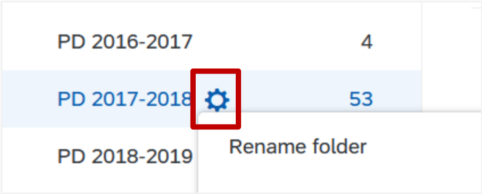


2. Scroll down if necessary, to the end of the folder pane, then click the **+Add new folder** button.
3. A text box will appear at the end of the folder list. Enter a folder name and press Enter.

You can assign a survey to a folder when creating it, or click and drag it to a folder from the project list.

\> Notice the navigation pane includes a folder for "Shared with Me." Here you will find surveys shared with you by other users.

- **To rename** or **delete a folder**, mouse over the folder name until the gear icon appears. Click on the gear icon and choose the appropriate option.



- **To move a survey to a folder -** Drag and drop survey from the project list to another folder.

NOTE: Currently, there is no option for simultaneously moving multiple projects to a folder!

Lesson 9 - Creating and Sharing Reports

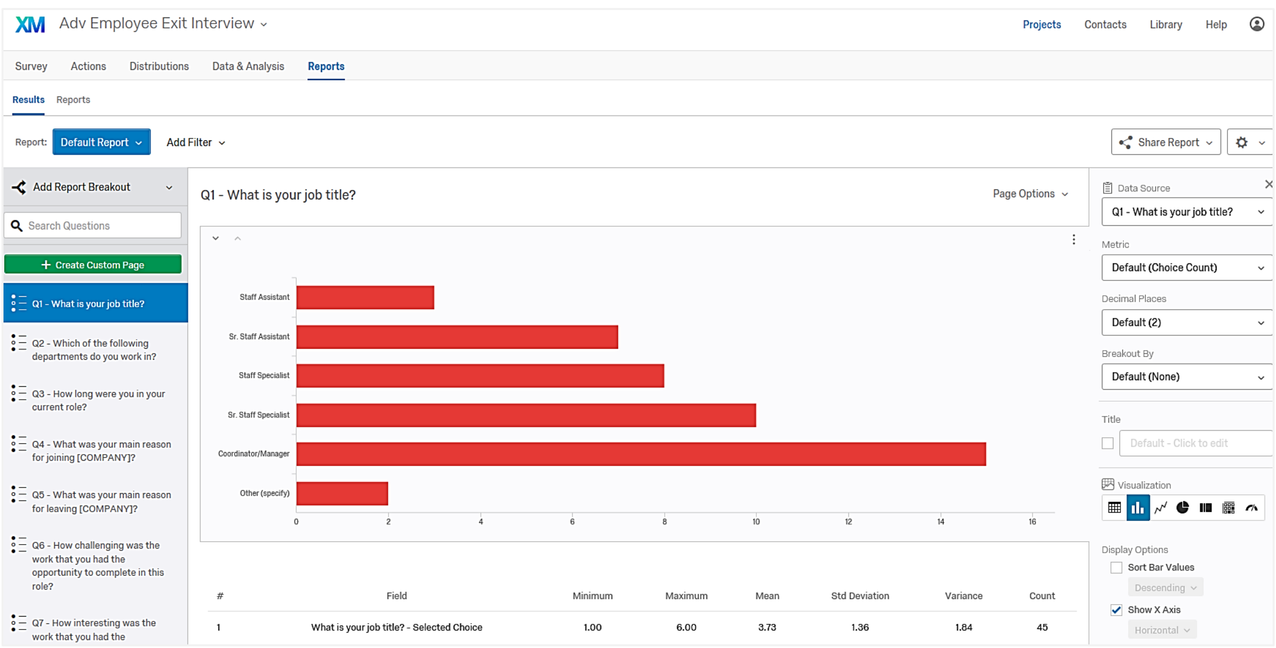
There are two options for generating reports:

- The **Results-Report** provides a summary of survey responses, and includes default visualizations such as charts and tables.
- The **Reports-Report** is for advanced report design. It enables you to control the layout, add custom formatting, tables, logos, and graphs, and more.

The Results-Report is generally sufficient for analyzing and reporting on your data, unless you need a unique format for your project.

Results-Report Overview

Each question in a Results-Report has a page with a default title and default visualization (chart or table) followed by a grey page separator. An editing pane that will appear on the right when you click on the question data.



Visualizations include:

- Simple Table
- Bar Chart (Horizontal or Vertical)
- Line Chart
- Pie Chart
- Breakdown Bar
- Statistics Table
- Gauge Chart

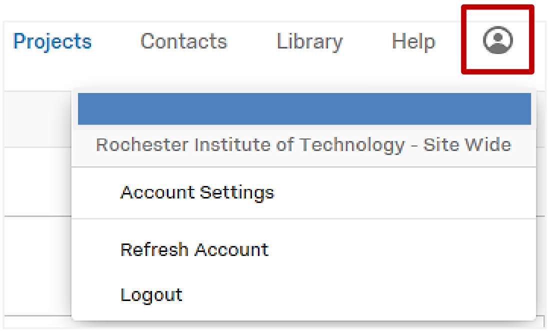
To customize a visualization, click on it and make the desired changes in the editing pane on the right. Customization options include changing the Metric (count, percentage, mean, etc.), Title, Visualization type, and Color Palette. There are different options available depending on the type of visualization chosen.

To Create a Results Report

1. Open the survey from the **Projects** page.
2. Click the **Reports** tab and click the **Results** sub tab.

   A default report will appear with each question displayed along with their default visualizations.

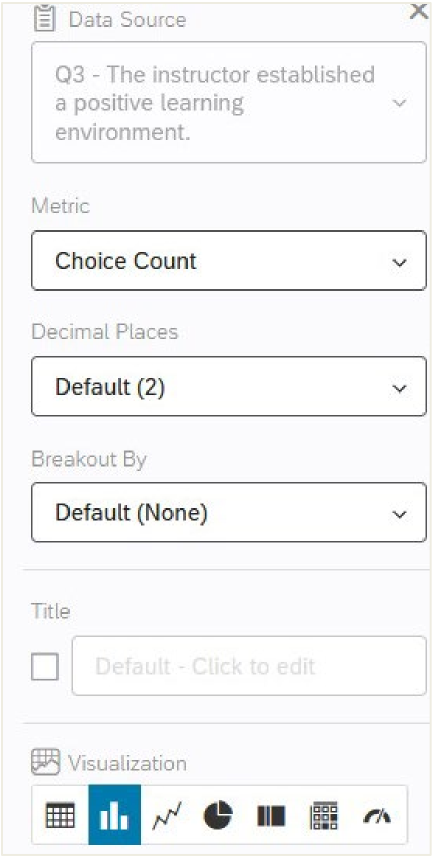
   Sometimes it takes a while for the visualization to appear. If nothing appears in a few seconds (or if a visualization you edited does not update), click **Refresh Account**, under the Account Profile button.



3. At the end of each question page, there are options to **Add Note** and **Add Visualization**.

   Use the **Back to Top** button near the top of the screen to return to the first question.

4. Click on a visualization to open its editing pane. The editing pane will appear on the right.



5. Change the visualization **title** by clicking in the **Title** box and typing in a new name.
6. Change the visualization **type** by clicking a new visualization icon in the editing pane.
7. Select the **metric** (percentage, count, sum, etc.) from the **Metric** dropdown arrow.
8. Change the **colors** by clicking the dropdown arrow in the **Color Palette** section and selecting among the various options.
9. Set other **Display Options** as desired.

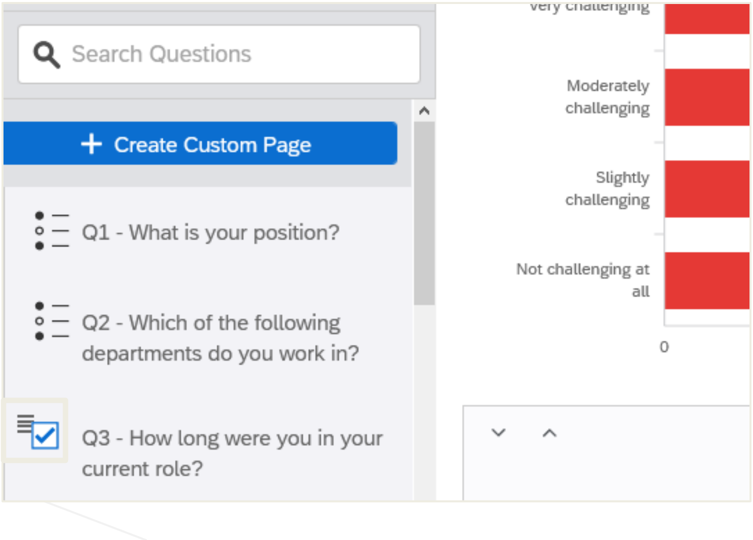
- **To Export a Visualization as an Image File**, click the small vertical dots in the upper-right corner of a visualization, then select **Export → Image File**. The image will be saved as a .png file in your default download folder.

- **To Add a Note**, click the + **Add Note** button and enter a note at the bottom of your modified page. After you enter your note, click outside it to accept it. The note will appear as a visualization.

- **To Add a Visualization**, click the + **Add Visualization** button and select the desired options in the editing pane.

Hide Pages

To hide pages you do not want displayed in a Results-Report, hover over the page icon on the question list on the left of the page and uncheck the checkbox.



Hidden pages are grayed out in your page list. To redisplay the page, re-select the checkbox.

<u>To Quickly Hide All Pages</u>

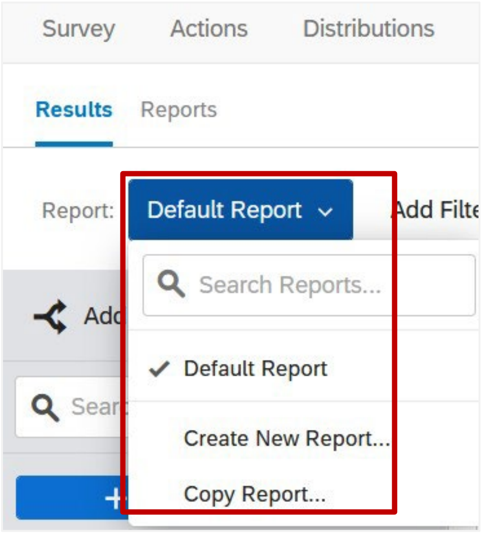
1. Click **Report Options** button:

2. Click **Hide All Pages**.
   - To redisplay the pages, click **Show All Pages** from the Report Options dropdown.

     NOTE: The **Page Options** dropdown contains options for hiding/unhiding individual pages.

Copy Report or Create New Report

The **Default Report** dropdown provides options to Search Reports, Create New Report, or Copy Report.

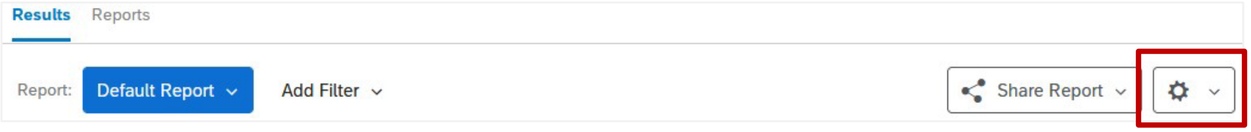


Report Settings

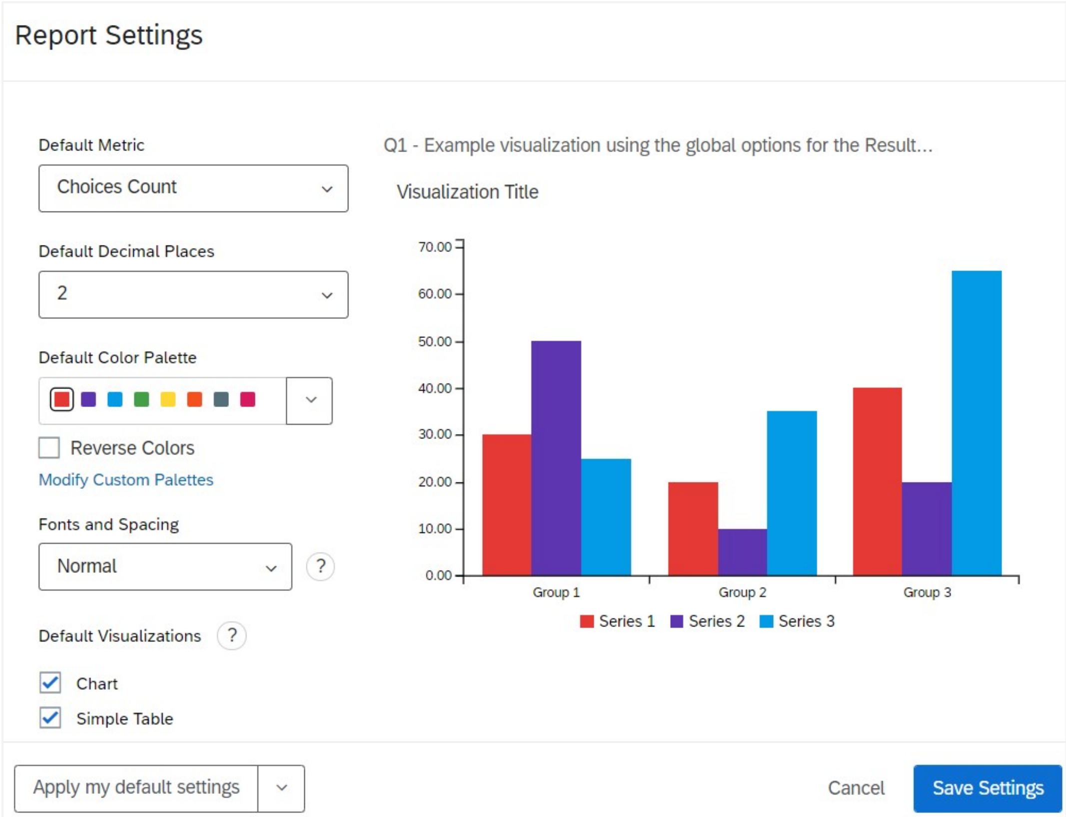
Settings can be changed for individual reports or globally for all future reports.
For example, you can change the default metric (count or percentage), fonts, color palette, and more.

To Set Individual Results-Report Settings

1. Click the **Settings** gear button on the toolbar, then select **Report Settings**.



The Report Settings window will appear:



2. Select the desired options and click **Save Settings** when done.

Options include:

- **Default Metric**: Choose the default metric that will be used in your visualizations:
    - **Choices Count**: Displays the number of times each choice was selected.
    - **Percentage:** Display the percentage of respondents who chose each choice.
- **Default Decimal Places**: The number of decimal places included in your report data.
- **Default Color Palette**: The colors used in your visualizations. Select **Reverse Colors** to reverse the order the colors in the palette appear.

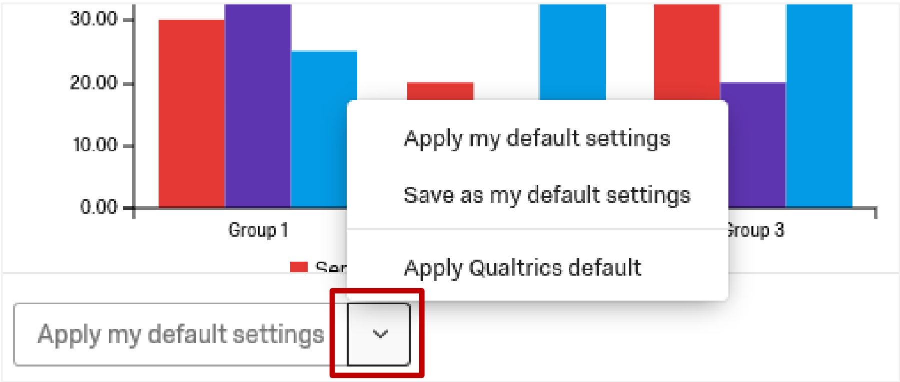
Click on a color on your palette to choose the first color that appears in your visualizations.

- **Fonts and Spacing**: Change the font size and spacing on your visualizations.
- **Default Visualizations**: Select the visualizations that will automatically be including your report. (Chart, Simple Table, and/or Statistics Table).
- **Use weighted metrics**: Applies the response weighting you have previously set up in the calculations.

To Set Default Settings

To use your customized settings in future reports by default, click the dropdown arrow next to **Apply my default settings**:

- **Apply my default settings** - applies the default settings you previously customized.
- **Save as my default settings** - lets you save the changes you made in the settings window globally for reuse on new reports you create.
- **Apply Qualtrics default** - reverts back to the default Qualtrics.

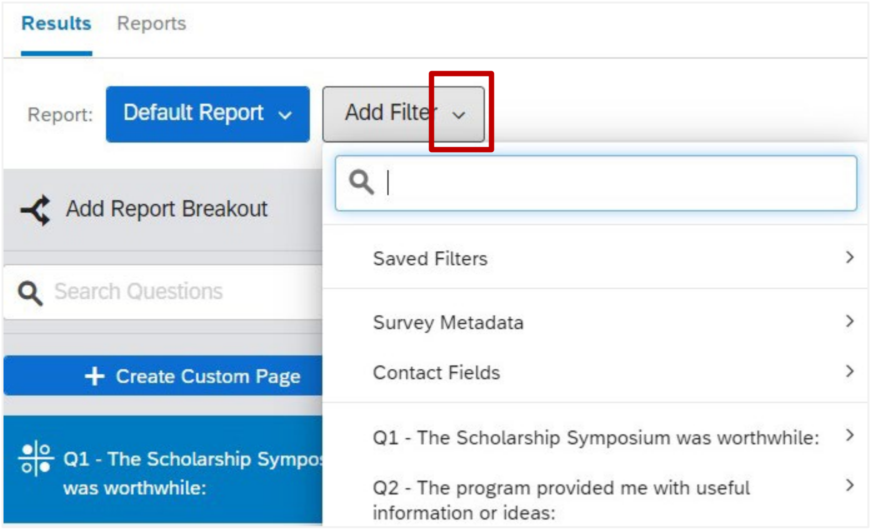


Filtering Reports

Filtering excludes data from your reports so you can focus on certain information. For example, in a report that shows which states respondents are from, you can filter out respondents who do not live in New York state.

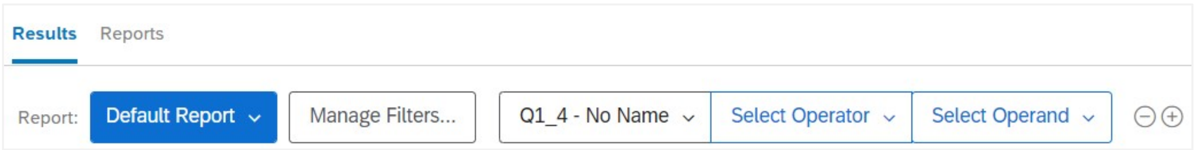
To Filter Based on Question Answers

1. Click the dropdown arrow next to **Add Filter**.

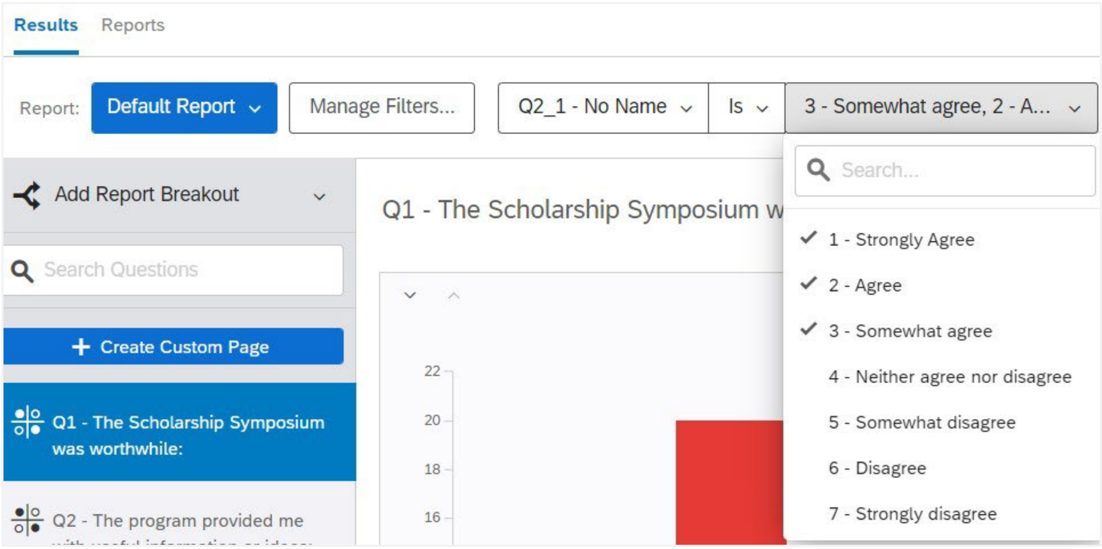


2. Select the Filter **Criteria** (the question to use as your criteria). You can also filter on Contact Fields, and Survey Metadata.
3. Choose **Selected choice**.

   The filter tools will appear:



4. Select an **Operator**: Select a logic operator such as: Is/is not, Equal to/Not equal to, Greater than/Less than, etc.
5. Select the **Operand** (value): Select the answer that must be chosen for the conditional statement to be met. You can select multiple answers by clicking on them. Selected answers will have a checkmark next to them.

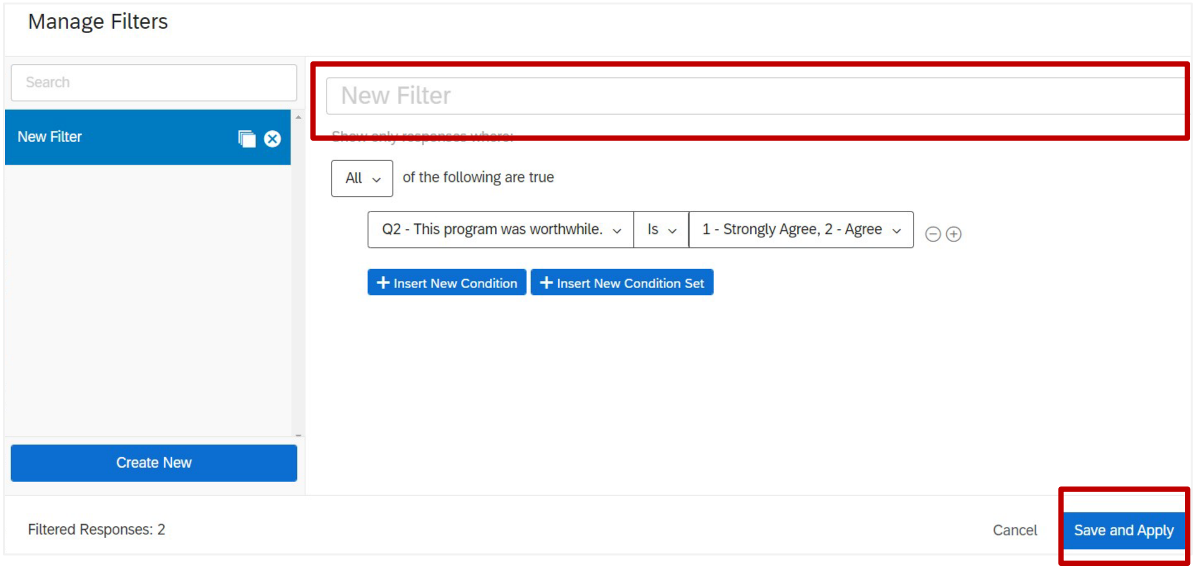


- To **add or remove conditions**, click the plus sign (+) or minus sign (-) on the filter toolbar.

It you add additional conditions, the **Manage Filters** window will open.

To Save a Filter

1. Click the Manage **Filters** button.



2. Type in a name for the filter.
3. Click **Save and Apply**.

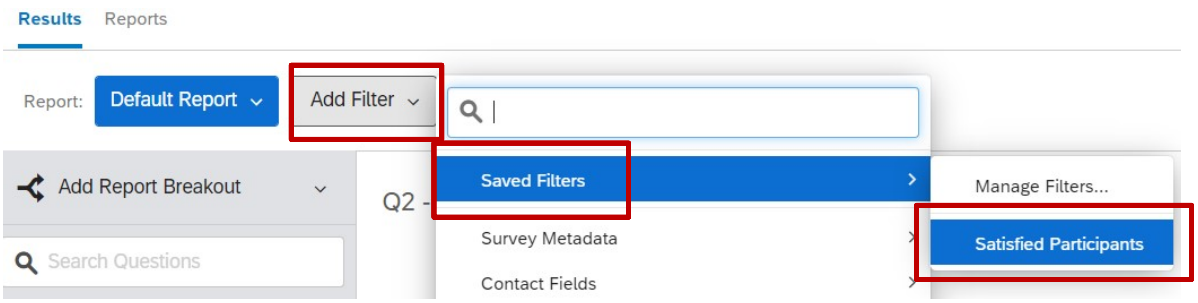
Save and Apply will not be clickable until all your conditions are complete. Click the minus sign (-) to remove any incomplete conditions.

To Remove a Filter

Click the minus sign (-) on the **filter** toolbar.

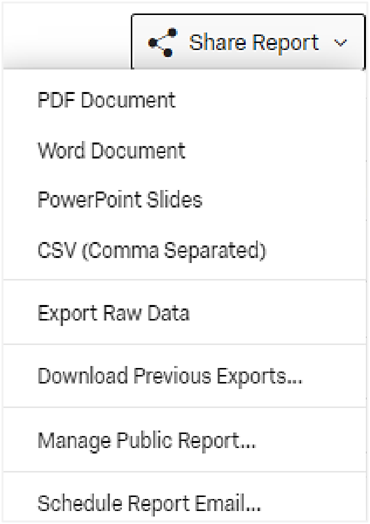
To Apply a Saved Filter

1. Click the **Add Filter** button.
2. Select **Saved Filters** then choose the filter you want to apply.
3. Click **Save and Apply**.



Sharing Reports

Results-Reports can be shared several ways:



PDF, Word, PowerPoint, or CSV Format

PDF, Word, PowerPoint, or CSV formats let you select which questions to include in the report and print survey results.

Export Raw Data

If you need to perform advanced data analysis, you can export your raw data and import it into another statistical program such as SPSS. Export Raw Data opens the **Data & Analysis** tab where you can view the results in a table format.

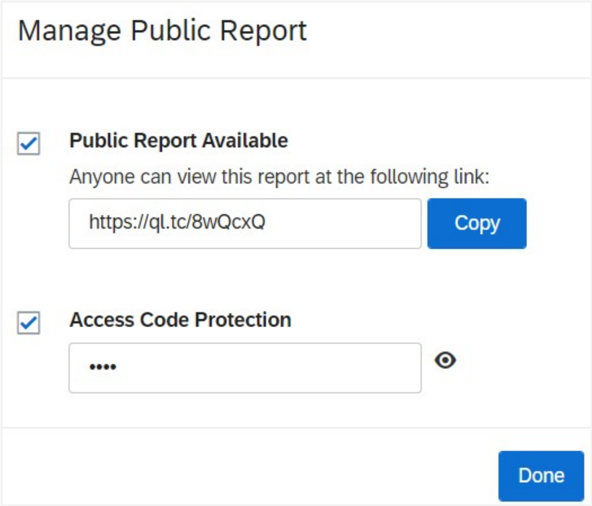
By using the **Export & Import** option, data can be exported as CSV, TSV, Excel, SPSS, or Google Drive (Sheets).

Manage Public Report

The Manage Public Report option generates a URL that can be used by anyone to view the report. Viewers can download the report as a PDF. Reports are updated in real time and can be accessed by anyone who has the link. A Qualtrics account is not needed to view the report.

To Create a Public Report

1. Click the dropdown for **Share Report** and select **Manage Public Report**.
2. Click to check **Public Report Available**. A URL will appear that can be copied and sent to others.



3. If you wish to add an access code for extra security, click the **Access Code Protection** box and enter a code.
4. Click **Done**.

Schedule Report Email

Send report to a contact list on a recurring basis.

⊗ **WARNING**: If you set up an email schedule, remember to discontinue it when it is no longer needed. **Reports will continue to be sent until you discontinue the schedule**.

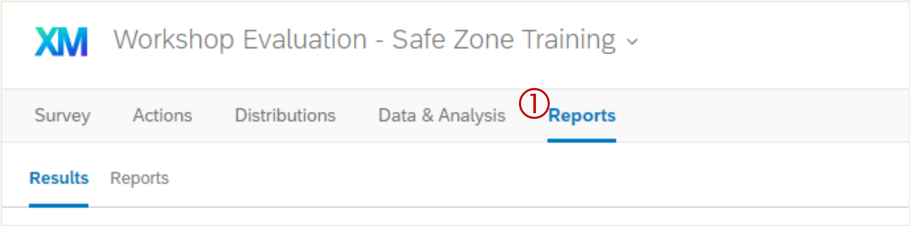
Share Report by Collaborating on a Project

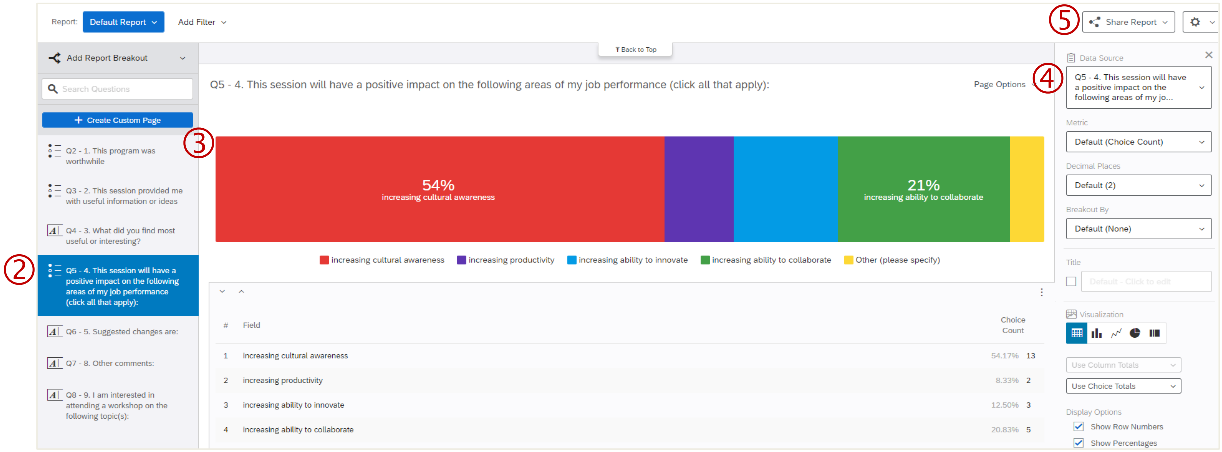
You can use the **Collaborate** feature to share your project with someone and grant them access to view, edit, and create reports using the same data. See page 28 for more information about Collaboration.

Exercise 4 - Create and Share a Results-Report

In this exercise, you will create a basic report and share it as a Word document.

1. Open a survey and go to the **Reports** tab.
2. Click on any question to view its default **question page**, title and visualizations.
3. Click any visualization to open its editing pane.
4. Experiment with customizing visualizations as desired by selecting the various options from the editing pane.
5. Click **Share Report**.
6. Select **Word Document**.
7. Click **Export Pages**.
8. Wait for the "**Download**" file to be generated.
9. Click "Download" link.
10. Click **Done.**



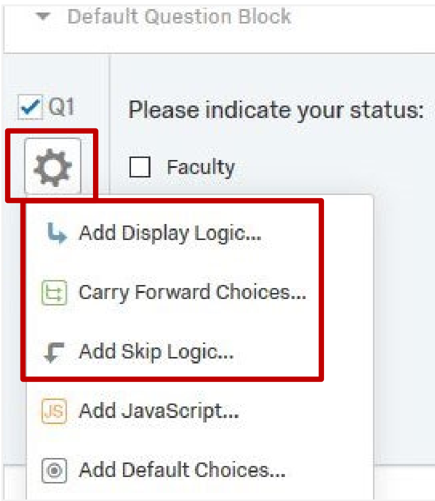


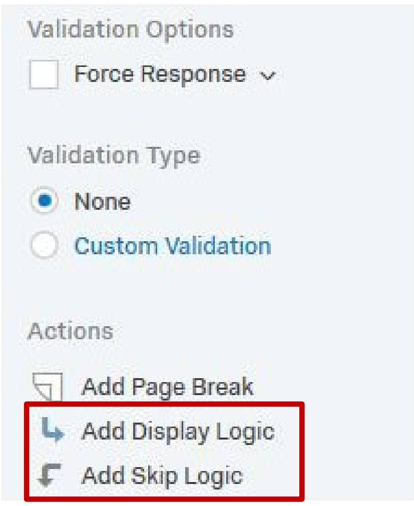
Part II -

Advanced Survey Techniques

Lesson 1 - Adding Display Logic and Skip Logic

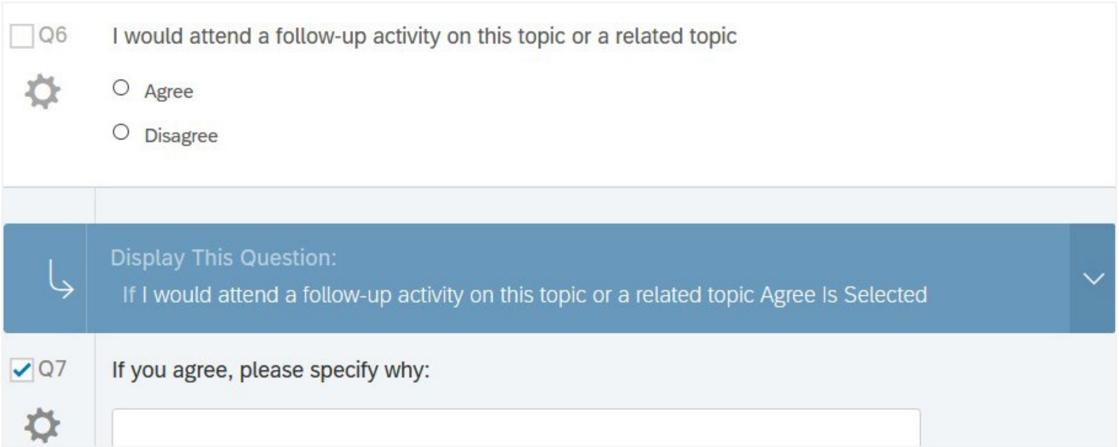
Logic options are available in two locations: the gear button on the left of a question, or the question options pane on the right side of the screen:





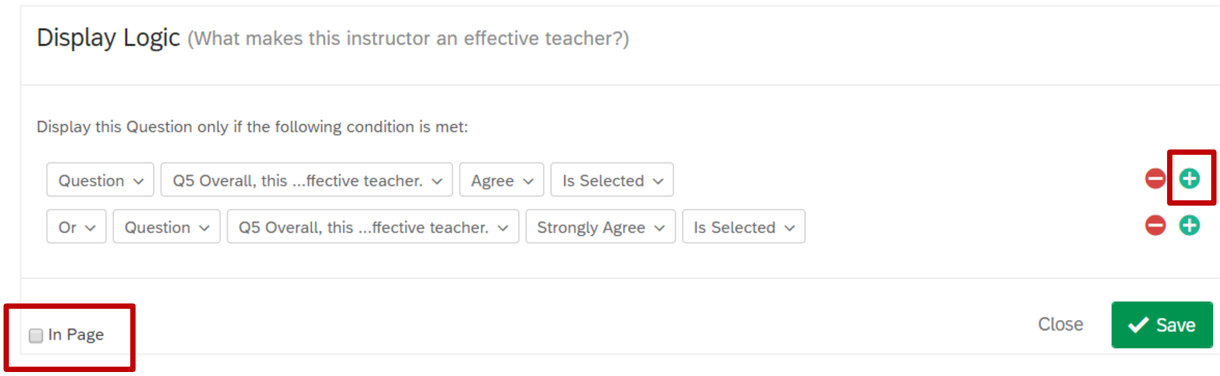
Display logic is used to display a question conditionally, based on the criteria you set. **Skip logic** is used to skip questions based on the criteria you set. Clicking the "+" button allows you to set advanced "And If" and "Or If" statements in the logic.

In the example below, respondents are asked if they would attend a follow up activity, and if so, another question is shown to ask the respondent to explain why:



To Set up Display Logic

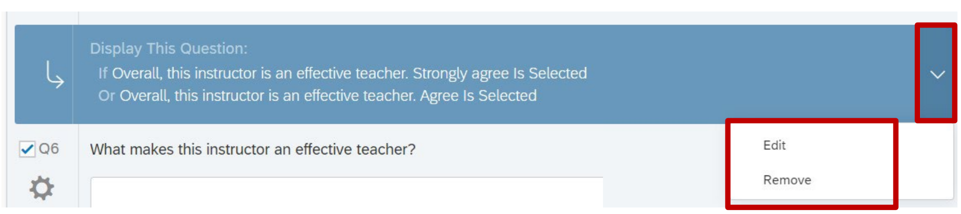
1. Select the question you want to display conditionally.
2. Click the gear button on the left and select **Add Display Logic**.
3. Set the logic statement by selecting the conditions that must be met for displaying the question. You can add additional conditions by clicking the "+" button.



4. Select the **In Page** checkbox if you want the question to appear immediately once the condition is met, instead of having it displayed on the next page of the survey.
5. Click **Save**.

To Edit or Remove Display Logic

Click the dropdown arrow on the Display Logic bar and choose **Edit** or **Remove**.



You can apply Display Logic to individual answer choices as well. Click on the answer choice to edit a choice, click the dropdown arrow, and select **Add Display Logic**. For example, you could display "Saturday" as an option only if the respondent answered "Yes" to "Are you available on the weekends?"

> Options that have display logic applied will have an arrow next to them:

Add Skip Logic

Skip Logic is similar to Display Logic, except it is added to skip a question, or multiple questions. Here is an example of skip logic:

Q4. In the past year, have you visited our website?

- ☐ **Yes** - *If Yes is selected continue to questions 5 and 6*

  Q5. How much time did you spend finding what you were looking for?

  Q6. Overall, how satisfied are you with online shopping experience?

- ☐ **No** - *If No is selected, skip to Question 7.*

Q7. How likely are you to purchase from our company in the next 12 months?

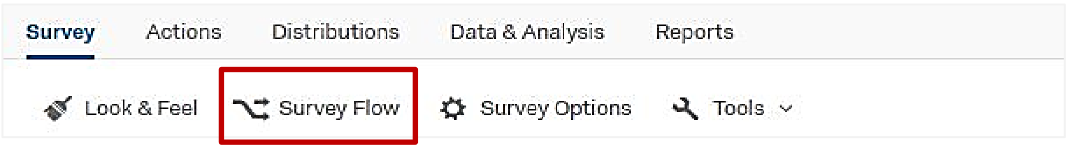
The question that can be skipped should be placed on a separate page.

To insert a new page, click **Add Page Break** from the questions options on the right. Add a page break before and after the question to be skipped.

Lesson 2 - Controlling Survey Flow

Survey Flow allows you to direct respondents through multiple paths in your survey. For instance, you could display different questions for respondents who meet certain criteria (such as “smoker” or “non-smoker”) or you can set up different survey termination messages.

Survey Flow is a menu item under the **Survey** tab:



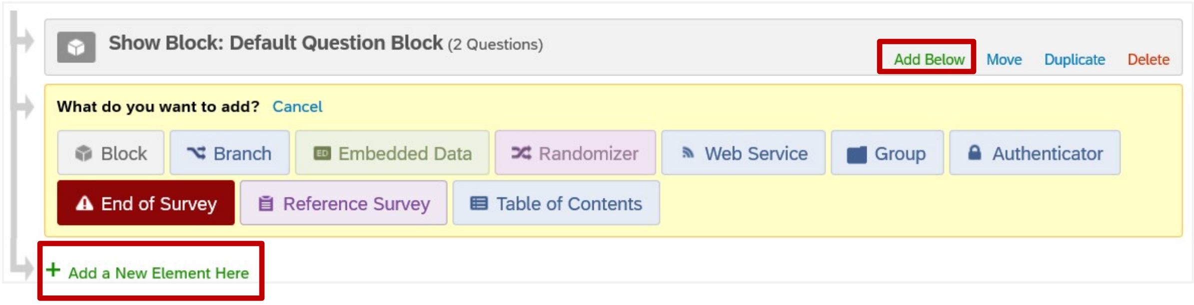
Survey Flow Elements

Here are the elements that can be inserted into the Survey Flow:

- **Block** - allows question blocks to be repeated or shown to different respondents, depending on where they are in the Survey Flow.
- **Branch** - is similar to Display Logic, but it allows for more complicated paths. For example, you can conditionally display blocks or other Survey Flow elements.
- **Embedded Data** - Embedded Data is extra information you want recorded in addition to the question responses. For example, the URL the respondent used to access the survey, or the total duration (the time it took for the respondent to take the survey).
- **Randomizer** - randomly displays the elements you select.
- **Web Service** - sends information to an external server that responds with information you can display or use as a basis for logic statements.
- **Authenticator** - requires users to log into your survey.
- **End of Survey** - takes the respondent to the end of the survey. For example, this is useful for termination of non-qualifying respondents. Options include displaying a message and redirecting to a URL.
- **Reference Survey** - allows you to insert a previous survey.
- **Table of Contents** - allows respondents to easily navigate between question blocks while taking a survey.

To Add an Element into a Survey Flow

1. Click the **Survey Flow** menu item under the **Survey** tab.
2. Click the **Add a New Element Here** link that appears under the question block.



- **Add Below** appears on each block to allow you to insert an element directly below that element.
- **Add a New Element Here** appears at the end of the survey flow and under each Branch, Randomizer, and Authenticator.

Move Element

To move elements in the Survey Flow:

1. Click and hold the **Move** button on the element. The selected element changes colors (green).
2. Drag and drop the element at desired location between or within other elements.

NOTE: When moving a branch, randomizer or authenticator, all elements under it will move as well.

Delete Element

To delete or remove elements from the Survey Flow:

1. Press the **Delete** button on the element.
2. When the confirmation window displays, click **Yes**.

NOTE: When deleting a branch, randomizer, or authenticator, all elements under it are removed as well.

Collapse/Expand View of Nested Elements

The branch, randomizer and authenticator elements can have other elements nested under them. For example, the randomizer will have the blocks you have selected to be randomized under that element.

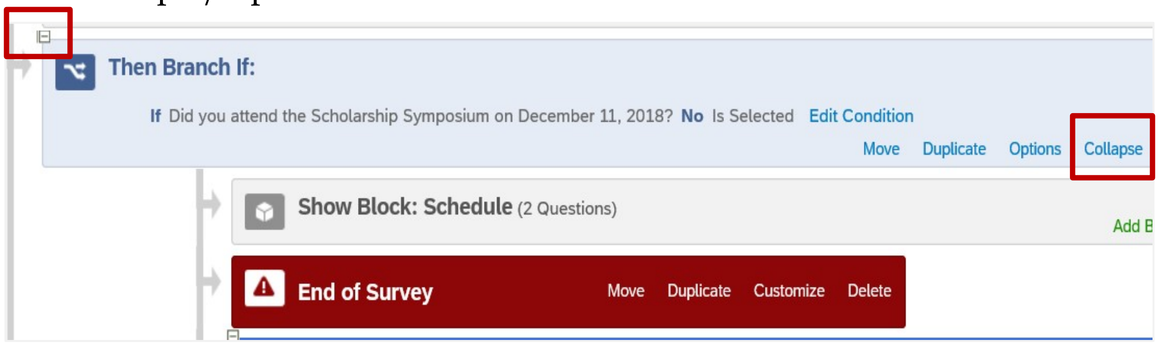
On these elements, you will also find the **Collapse** option.

To Collapse or Expand the View of an Element

For elements containing other elements:

1. Select **Collapse** to collapse elements or click **Expand** to expand all contained elements.

NOTE: Clicking the "**-**" and "**+**" button at the top left corner of the element will also collapse/expand these elements.



Re-Size the Survey Flow View

Change the size of the Survey Flow view by using the **Zoom Out** and **Zoom In** buttons at the top right of the Survey Flow window to adjust the size.

Save Survey Flow

When finished working in the Survey Flow, you must click the Save Flow button (located at the bottom right).

How to Use the Survey Flow Elements

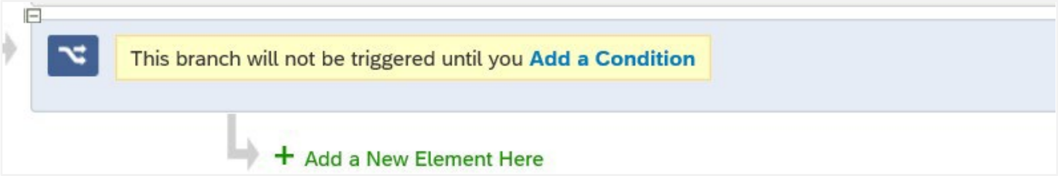
- **Block**

  Allows you to select a block to insert into the survey flow.

- **Branch**

  Branching can be set to trigger when respondents meet the condition specified on the branch. If the condition is met, then the elements in the branch will be shown. This is similar to Display Logic, except you can include any Survey Flow element within the branch, including other branches.

  Click **Add a Condition** to specify the criteria that must be met for the items under the branch to be shown.



  Examples of items you can base your logic on include questions, embedded data, device type, and quotas. Click on the condition to edit the logic statement. When editing, there are **(+)** and **(-)** buttons to the right of each line of logic to add or remove additional logic statements.

- **Web Service**

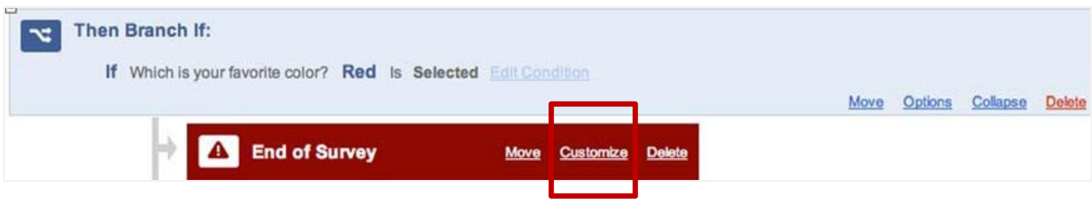
  The Web Service uses advanced programming to retrieve data from websites and store the values as embedded data, or run scripts to perform actions.

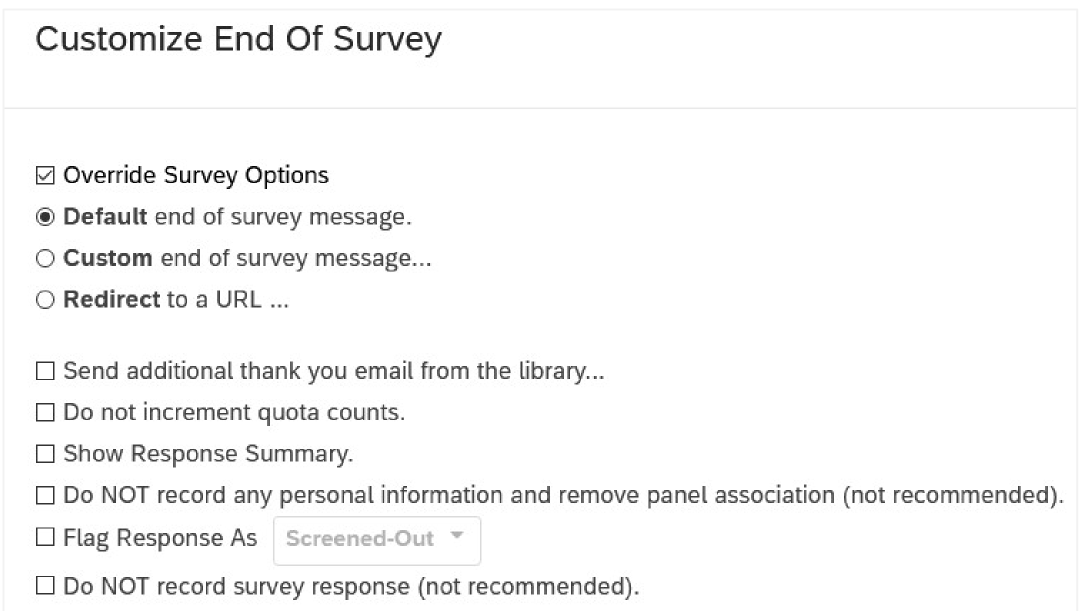
- **<u>End of Survey</u>**

  The End of Survey element can be used to terminate the survey based on criteria set for responses. For example, you could terminate the survey if the respondent is not qualified to take it. End of Survey also can be placed at the end of a survey flow to display a custom message or redirect respondents to another website.

To Customize the End of Survey

1. Click **Customize** to see the customization options:
2. Click **Override Survey Options** to make the options accessible:





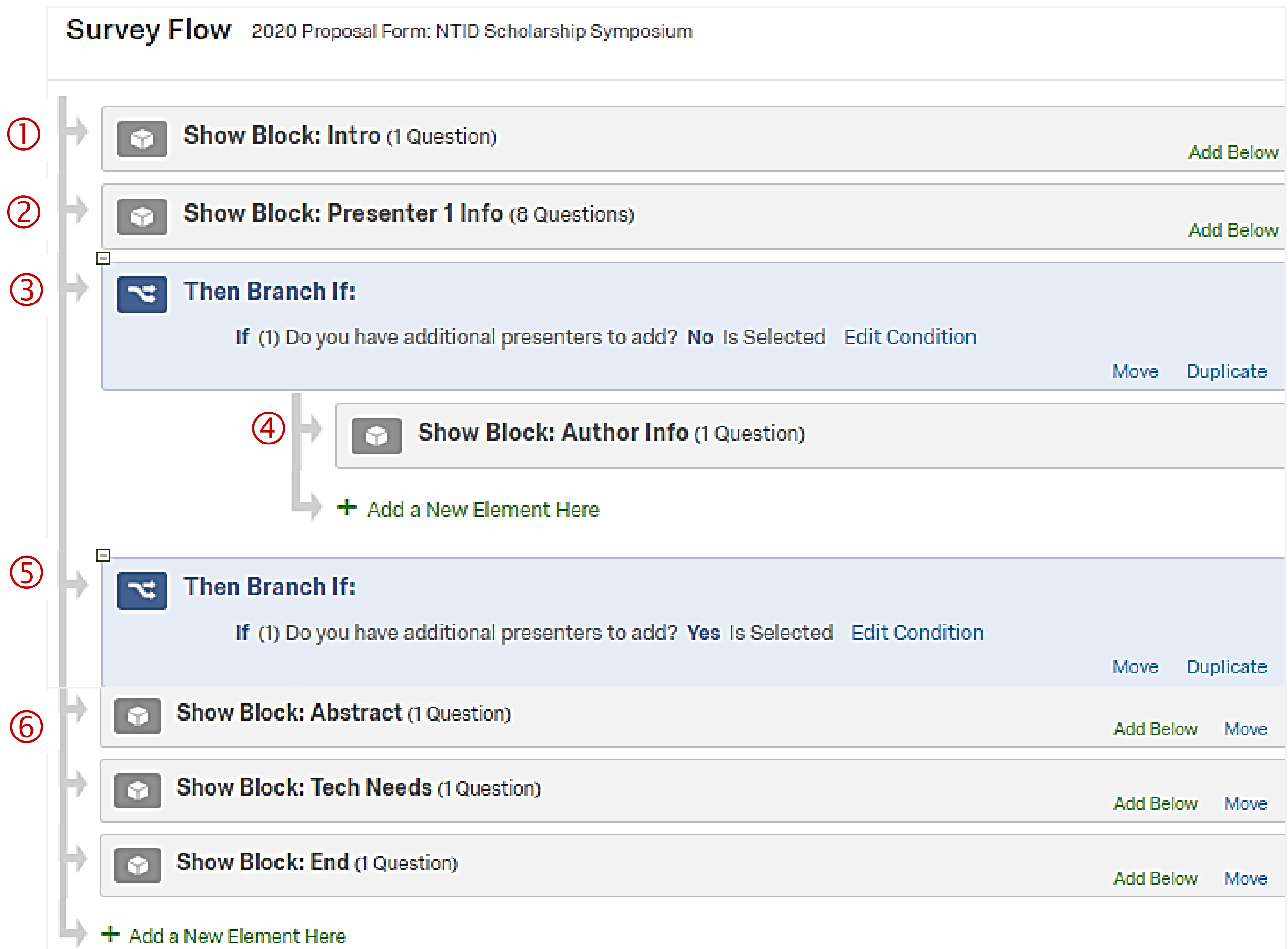
- **Default End of Survey Message**: By default, the end of survey message is: “*We thank you for your time spent taking this survey. Your response has been recorded.*”
- **Custom End of Survey Message**: Display your own custom message to your survey-takers. Click the dropdown arrow next to **Select a message**, click **My Library** ..., then select an existing message from your message library, or create a new one.

- **Redirect to a URL:** Redirect respondents to another webpage when they finish the survey. Simply copy/paste the URL into the text field.
- **Send Additional Thank You Email from the Library:** Send a Thank You email to your participants who complete your survey, one by one as their responses come in. This only affects those who terminate at this specific End of Survey element. Select an existing Thank You message or create a new one.
- **Do Not Increment Quota Counts:** Don't increment quota counts for respondents who terminate at the specific End of Survey element. Quota counts only increment when someone terminates the survey, but typically you don't want to increment the count for someone who doesn't qualify for your survey.
- **Show Response Summary:** Displays a report of the survey takers' responses. The report can then be downloaded.

Survey Flow Example

Figure 1 shows a survey flow for a survey for a symposium proposal form. It displays blocks based on the respondent's answers. The survey flows as follows:

① Show Introduction block ② Show block of questions for Presenter 1 ③ Ask if the respondent wants to add another presenter ④ If the answer is No, move on to Author Info block ⑤ If the answer is yes, show block of questions for next presenter (Presenter 2) ⑥ Continue to Abstract block, then to remaining blocks, then to end of survey.

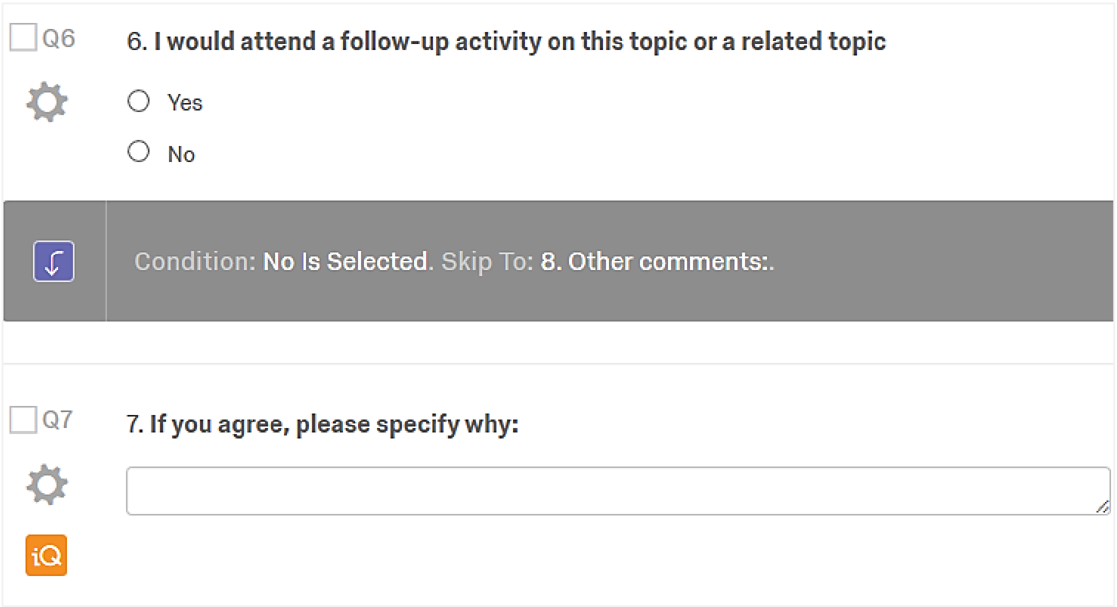


Survey Flow Example

Exercise 5 - Add Display Logic to a Survey

In this exercise, you will add display logic to the PD Workshop Evaluation. If the respondent wants to attend a follow-up activity, the next question will ask why.

1. Open the **PD Workshop Evaluation** survey.
2. Click on the question that you will use to evaluate the condition (Q6).
3. Click **Add Display Logic** from the question options pane on the right.
4. Select the **conditions** that must be met and select the question to skip to. In this case, if the answer to Q6 is “Yes,” skip to Q7 “If you agree, please specify why:”



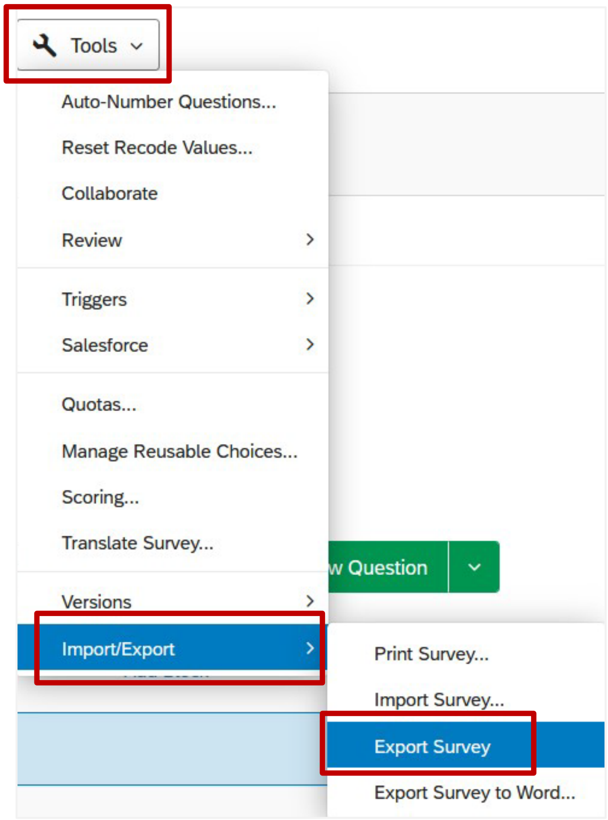
Lesson 3 - Exporting Surveys

Surveys can be exported into two formats: Qualtrics Survey Format (QSF) and Microsoft Word:

- Exporting QSF surveys is useful for making backups, importing surveys into other Qualtrics projects, or for sending surveys to others to import into their project list.
- Exporting surveys to Microsoft Word is useful for printing surveys or emailing them to others.

Export a Survey to QSF Format

1. Open a survey.
2. Under **Tools**, select **Import/Export**.

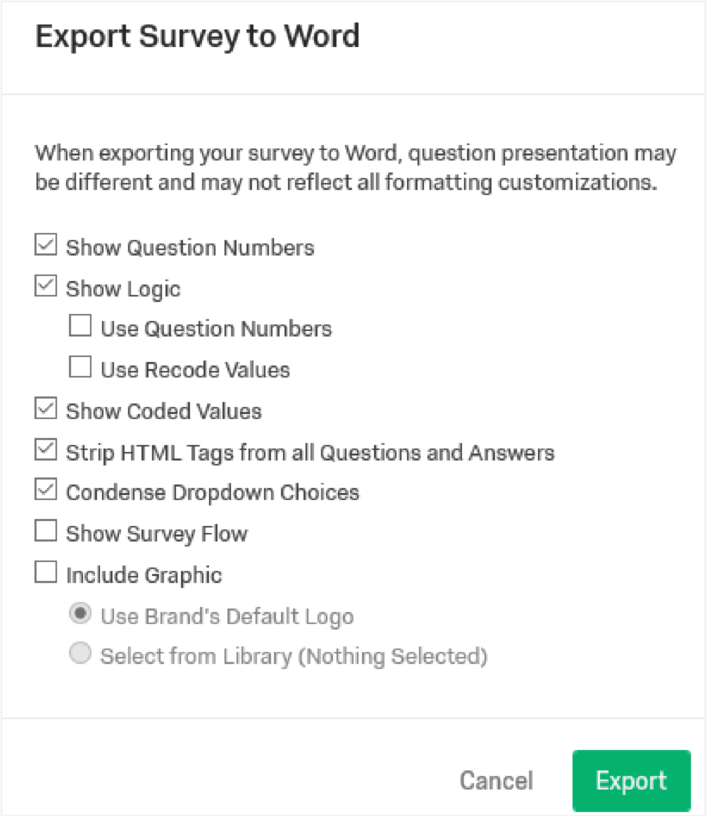


3. Click **Export Survey**.
4. Select **Save File**. Click **OK**.

   > A .qsf file will be saved to your default download folder.

Export a Survey to Microsoft Word

1. Open a survey.
2. Under **Tools**, select **Import/Export**.
3. Click **Export Survey to Word**.
4. The available options are selected by default:
    - **Number Questions with Export Tags**: Determines whether question numbers are displayed.
    - **Show Logic**: Allows Skip Logic and Display Logic to be shown in the downloaded file. Branch Logic in the Survey Flow will not be shown.
    - **Show Coded Values**: This shows the numeric value of each answer choice.



5. Click **Export**.
6. **Save** the file. The file will be saved to your default download folder.

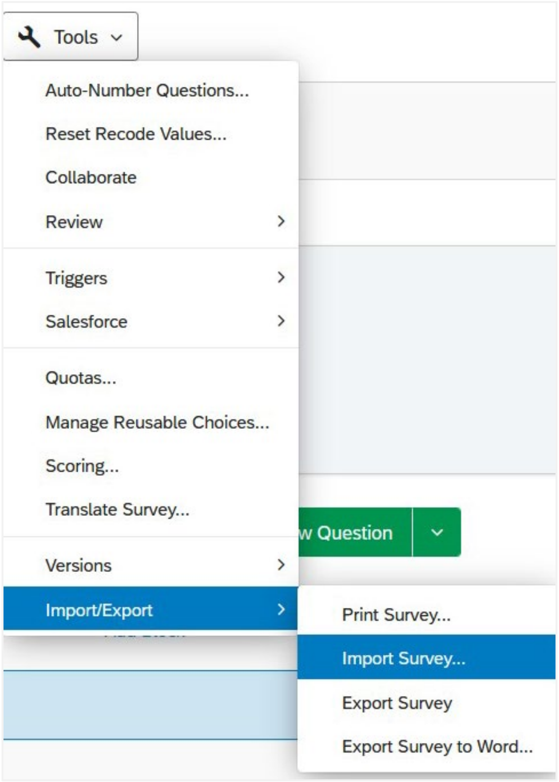
Lesson 4 - Importing Surveys from QSF Files

The Import Survey feature allows you to import a survey file into a Qualtrics project. The file must be in Qualtrics Survey Format (QSF).

You can import QSF files to use as templates for future surveys. One example is the [NTID Mid-Course Feedback (MCF)]() form. MCF templates are available from NTID's Academic Affairs page, for faculty to import into their Qualtrics accounts.

To Import from a Qualtrics Survey Format (.qsf) File:

1. **Create** a **new project**.
2. Under **Tools**, select **Import/Export**.
3. Click **Import Survey**.



4. Click **Browse** and find the .qsf file on your computer.
5. Click **Import**.

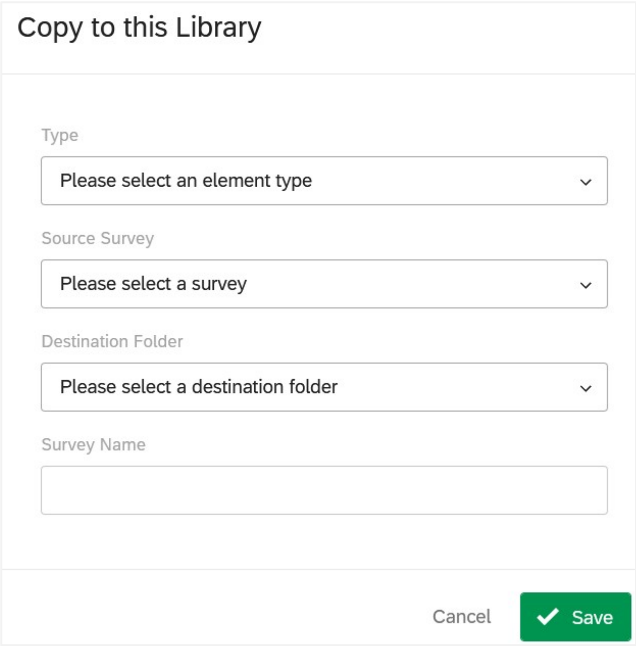
⊗ **WARNING: Importing overwrites existing survey data, so be sure you are importing into the correct survey!**

Lesson 5 - Using Libraries

Libraries let you store questions, surveys, graphics, files, and messages so you can reuse them as needed. There are four types of libraries: Survey Library, Graphics Library, Files Library, and Message Library.

To Copy Surveys, Blocks, or Questions to a Library

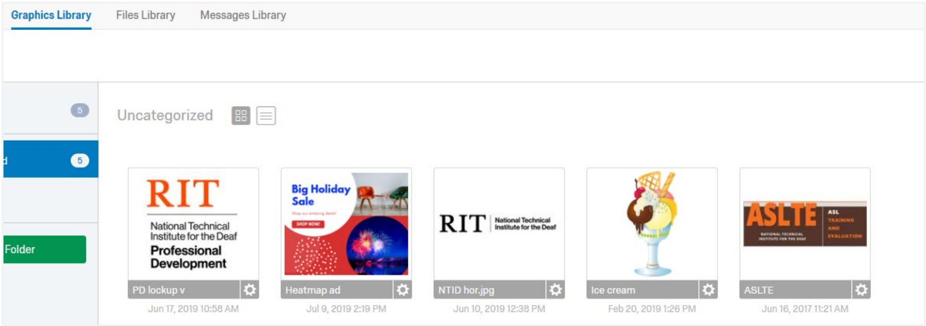
1. Click on the **Library** tool at the top of the project list.
2. Click **Survey Library**.
3. Click the **Copy to this Library** button.
4. Select an element **Type** (Survey, Block, or Question).



5. Select the **Source Survey**.
6. If you have selected Question or Block as the element Type, you will see the option to select the **Source Question** or **Source Block**.
7. Select a **Destination Folder**. If no folder is selected, the survey will automatically be placed in the Uncategorized folder category.
8. By default, the Survey, Question or Block Name will be the same as the Source.
9. Click **Save**.
   > The element will be added to the Library under the appropriate tab.
   > To locate an element, click Show All, Show Surveys, Show Blocks, or Show Questions.

Graphics Library

The Graphics Library stores images that can be used in your surveys. You can upload JPGs, PNGs, and GIFs. The size limit is 16 MB.



Example of gallery in Graphics Library

To Add a Graphic to the Graphics Library

1. Click on the **Library** tool.
2. Click the **Graphics Library** tab.
3. Click the **Upload Graphic** button.
4. Click **Upload a Graphic from your computer**, drag or drop the files to upload, or click **Link to a File on the Web** to enter the URL for the images. Your image will now appear in the gallery.

> Additional options are available by clicking the gear icon next to the image name.

> You can change the image name by clicking on it and typing over the existing text.

To Change the Size of a Graphic

1. Click the gear next to the image name.
2. Click **Edit Graphic**.
3. Enter the desired dimensions (width and height).

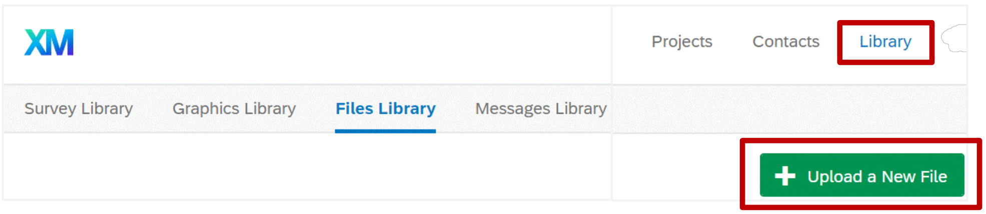
   NOTE: If you use a graphic from the web, you cannot modify its size.
4. Click **Save.**

Files Library

Use the Files Library to store files that you will insert into survey questions.

To Upload a File

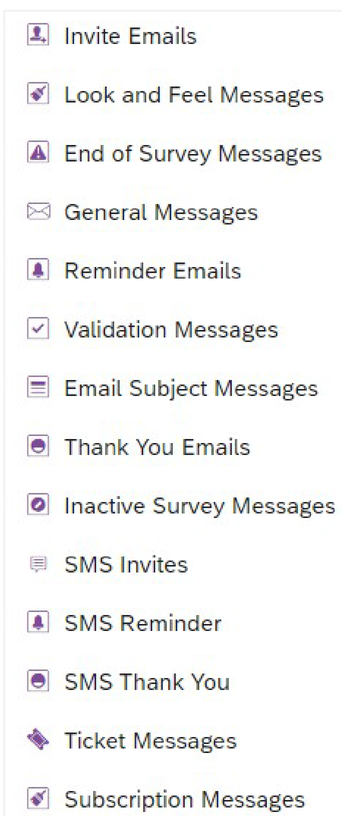
1. Click the **Library** tool.



2. Click the **Files Library** tab.
3. Click **Upload a New File**.
4. Click **Choose Files From Your Computer**.
5. Locate the file you want to upload and click **Open**.
6. Click the **Upload # File** button (# will display the number of files you selected).
   > Images are automatically stored in the "Uncategorized" folder.

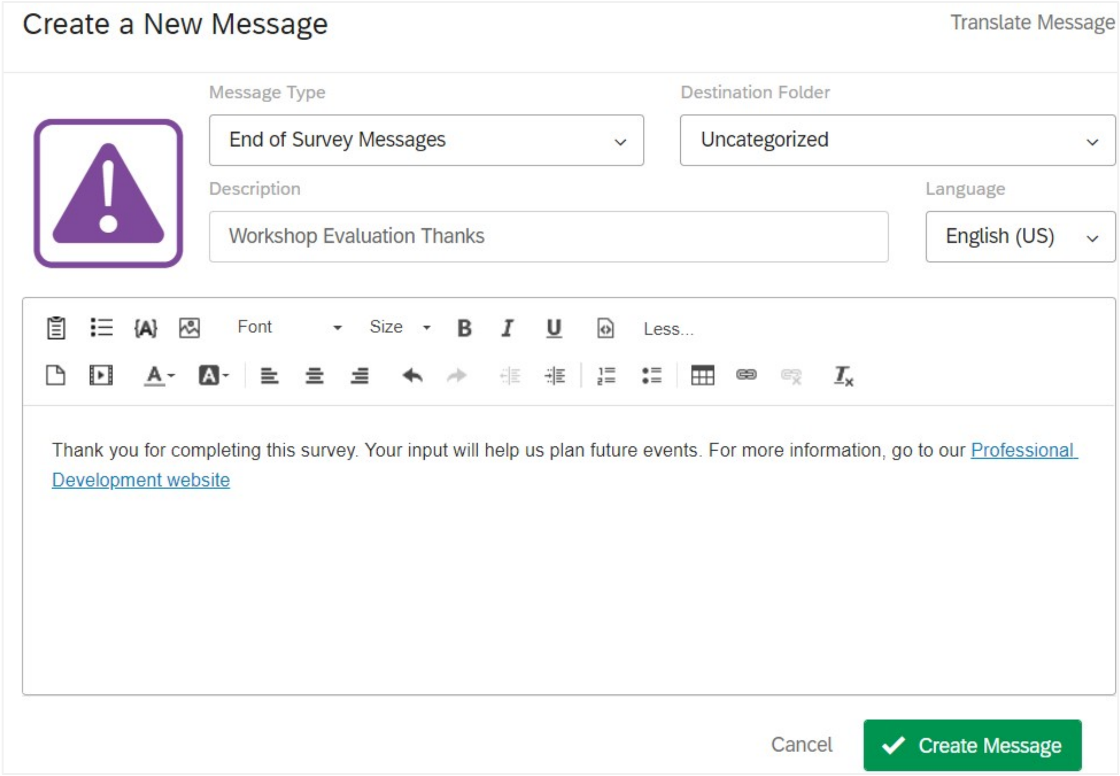
Messages Library

The Messages Library stores the custom messages you create. Messages can be organized into the following categories:



To Create a New Message

1. Click the **Library** tool, then click **Message Library**.
2. Click the **New Message** button.



3. Select the **Message Type** (such as **End of Survey Messages** or **Thank You Emails**).

   > Messages are automatically stored in the "Uncategorized" folder.

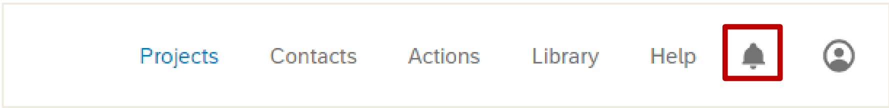
4. Enter a **Description**.
5. Enter the message in the text editor.
6. Click **Create Message**.

   > The message will appear on the message list with the name you used for the description.

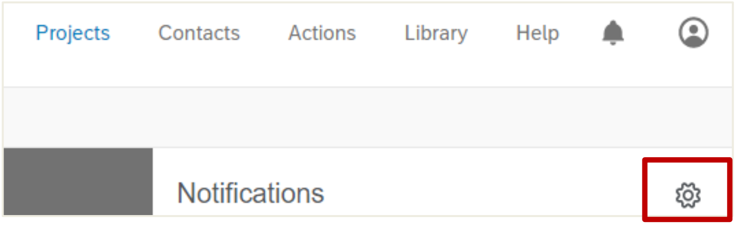
Appendix A - Notifications

Qualtrics can send you various notifications. For instance, you can receive an alert when a survey is shared, or you can receive an email notification when a survey digest is ready to be viewed. A digest is a summary of how many respondents have completed your survey.

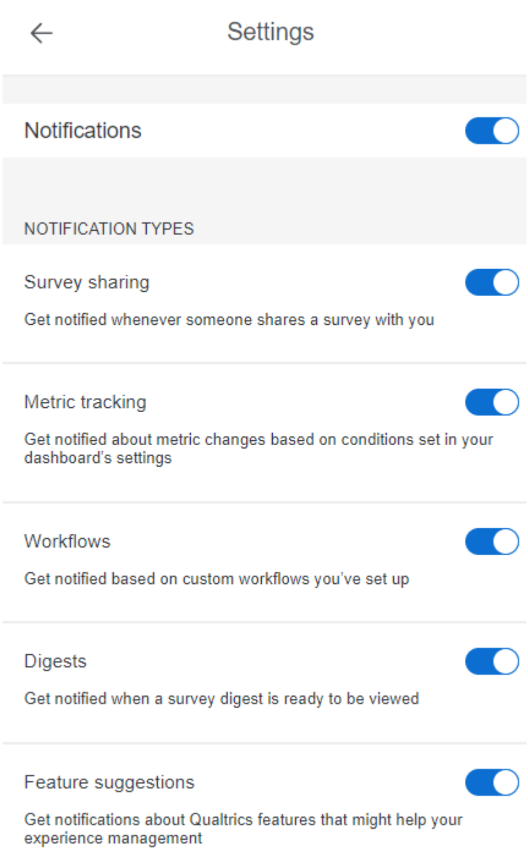
To retrieve notifications, click on the bell icon on the menu bar:



To turn notifications on or off, click the Notification button (bell icon), then click the **Notification Settings** button (gear icon), then click on the gear icon next to Notifications:



> **Turn notifications on or off** by clicking the slider next to the option. All options are on by default. Blue options will turn grey when you click to turn them off.



Appendix B - Managing Registration

There are five major steps to creating a registration survey in Qualtrics:

1. **Set up questions and blocks** - to collect the registrants' information
2. **Set Contact List Triggers** - to automatically store the registrants' information in one place
3. **Set Quotas** - to limit registration
4. **Create Email Triggers** - to send registration confirmation emails
5. **Distribute the survey**

1 Set up Questions and Blocks

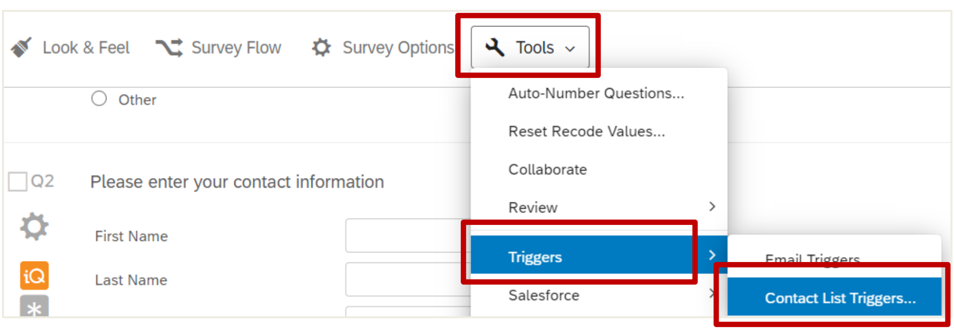
Organize the survey into blocks to collect the pertinent information. For example:

- ***Introduction*** - thank respondent for interest in the program and give the program details (date, location, etc.)
- ***Contact Information*** - create a Text Entry-Form question to collect the First Name, Last Name, email, etc. NOTE: by separating First Name and Last Name, you'll be able to sort the exported data file by last name, if desired.
- ***Customization*** - add any additional questions, such as menu choices or accommodation requirements.

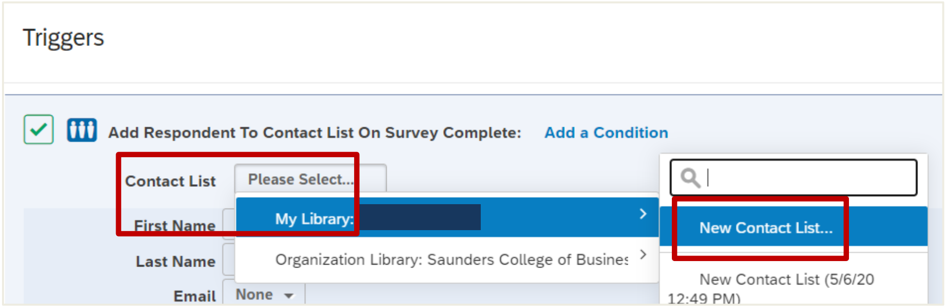
2 Set Contact List Triggers

Set Contact List Triggers to automatically add the registrant's information to a Contact List. The Contact List can then be used to email information or send reminders.

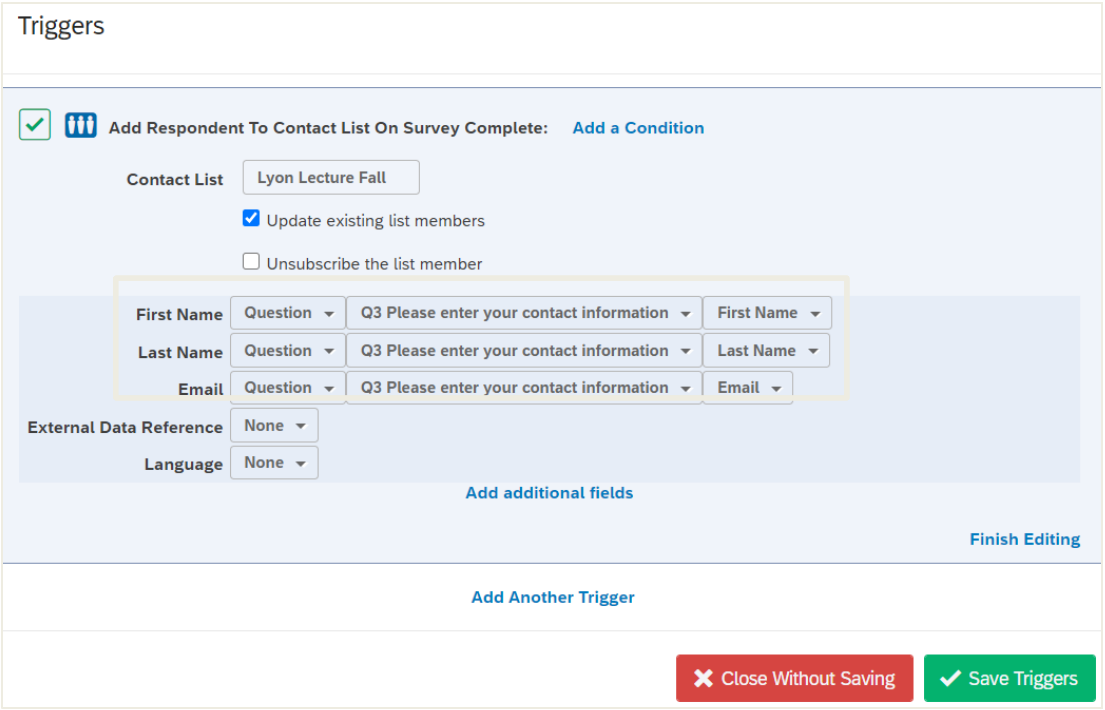
1. Click **Tools, Triggers, Contact List Triggers**:



2. Click **Contact List**, select **My Library** … then select **New Contact List**.



3. Type in a **Contact List Name** and click **Save**.
4. Match the field names with the respective questions in the survey.

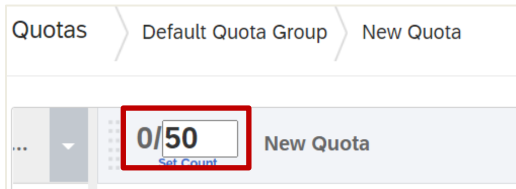


5. Click **Save Triggers**.

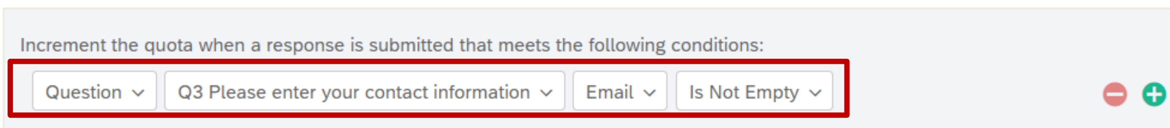
③ Set Quotas

Quotas can be set to limit registration.

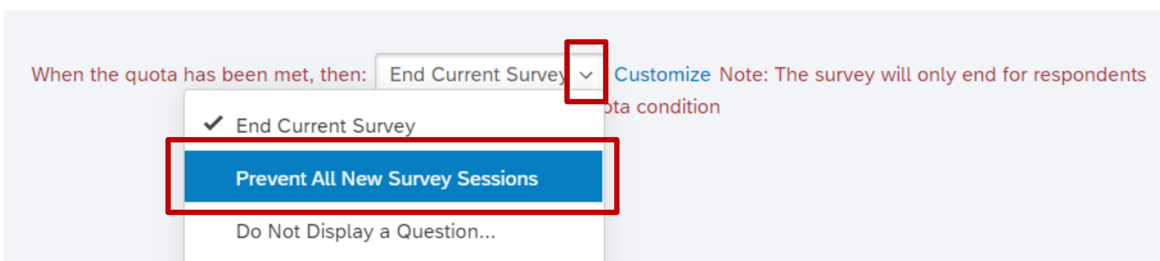
1. Click **Tools, Quotas**.
2. Click **Add Quota**.
3. Type in the new quota (in this case, 50).



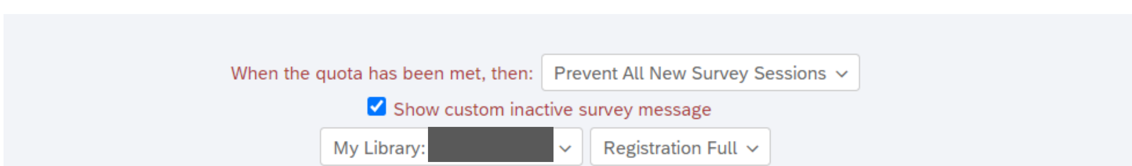
4. From the dropdown arrows under "Increment the quota …" select: **Question, Q3 Please enter your contact information, Email, Is Not Empty.**



5. Change the quota action to **Prevent All New Survey Sessions**



6. If you would like to display a custom message when respondents attempt to register after the quota has been met, click **Show custom inactive survey message**, select a **Library**, and select or add a new message.

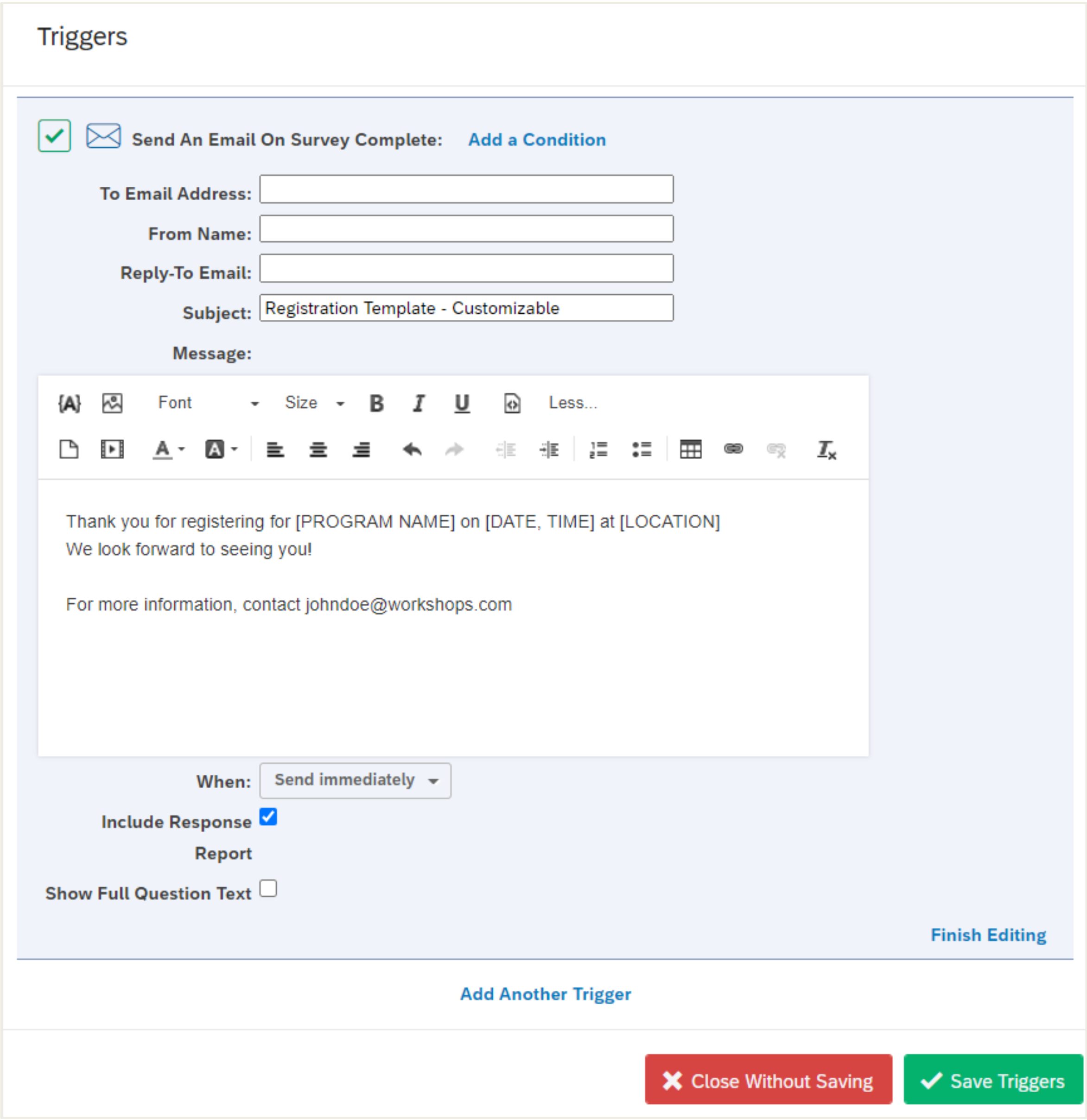


7. Click **Save**.

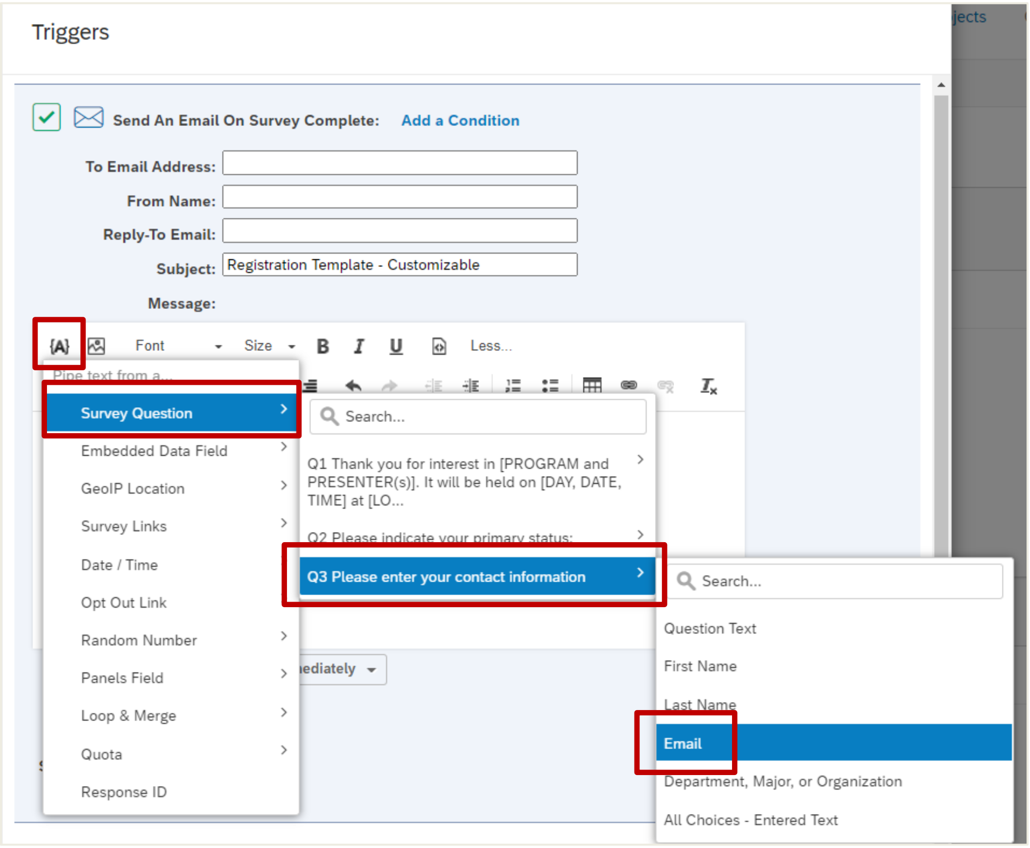
4 Create Email Triggers

Email Triggers can be used to send registration confirmations.

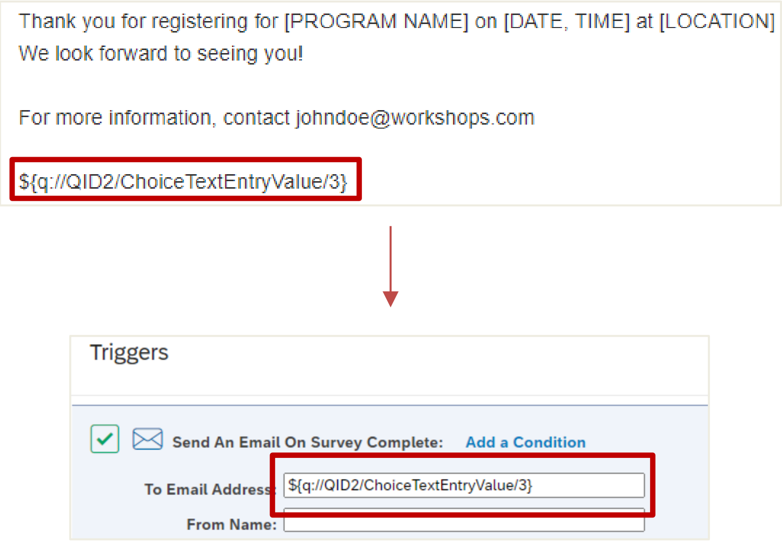
1. **Go to Tools**, **Triggers**, **Email Triggers**.
2. Enter the text, From Name, Reply-To Email, etc.



3. Use piped text to retrieve the respondent’s email address:



4. Cut and paste the piped text in the **To Email Address**.



5. Click **Save Triggers**.

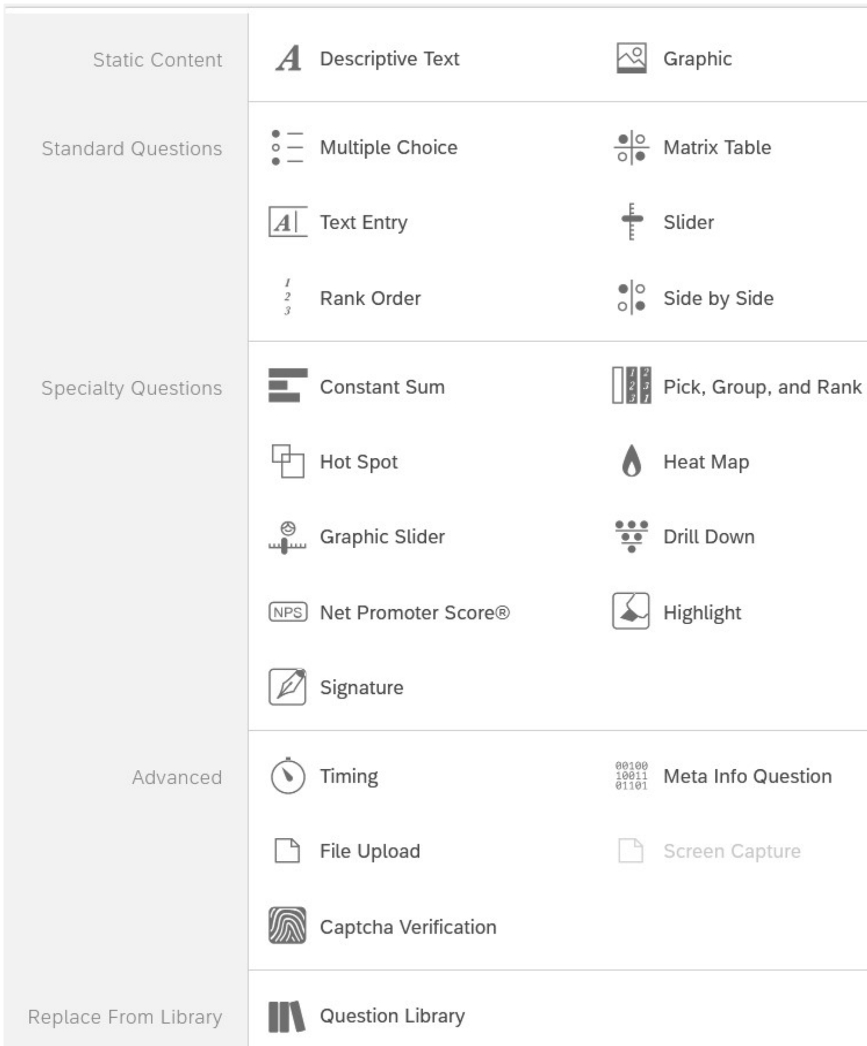
5 Distribute the Survey

1. Go to the **Distributions** tab.
2. Choose **Anonymous Link**.
3. Copy the anonymous link, and share in the appropriate location.

Appendix C - Question Types

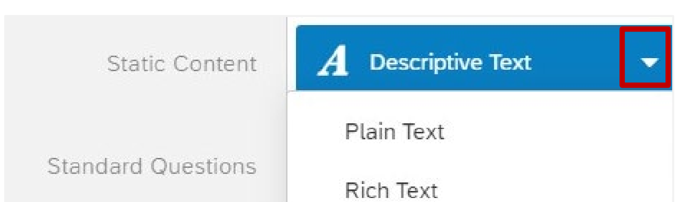
There are various question types available, as shown below.

> When you mouse over a question type, a sample graphic appears.



Questions types

> Click the down arrow next to the question type to see the variations:



Question type variations

Descriptive Text & Graphic Questions

Descriptive Text and **Graphic** questions let you display information without asking a question. This is helpful for making an introduction page or for giving instructions on completing the survey.

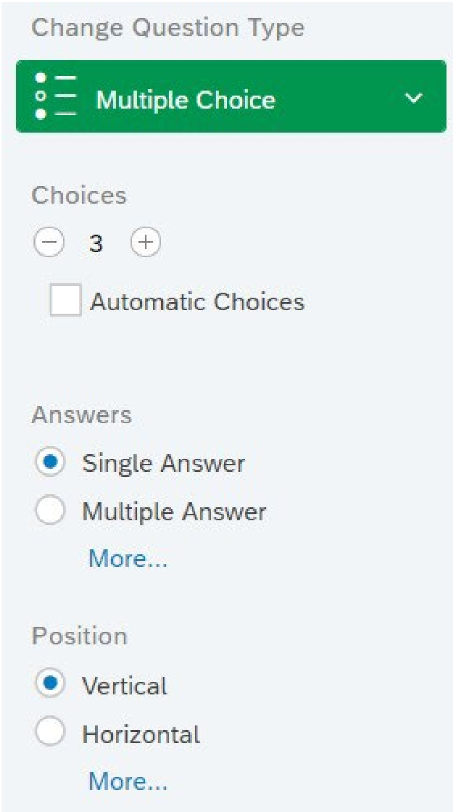
Descriptive text has two variations:

- **Plain** - no text formatting
- **Rich Text** - allows for basic formatting (such as font size, bold, colors)

Graphic questions let you add a graphic instead of a question. This could be helpful for asking respondents to evaluate an image. Variations include adding text and/or URLs to the graphic.

Multiple Choice

When you create a survey, a Multiple Choice question appears by default, with three choices. There are numerous variations in Multiple Choice questions, including Single Answer, Multiple Answer, Dropdown List, and Select Box.



Multiple choice question options

- **Choices**: Click the **-** or **+** to increase or decrease the number of answer choices. Check **Automatic Choices** to display common answer scales such as "Strongly Agree ... Agree ... Disagree." Additional variations are available from the dropdown arrow next to default choices.

- **Answers**:
  - **Single Answer**: Uses radio buttons; only one choice can be selected at a time.
  - **Multiple Answer**: Uses checkboxes; respondents can select more than one choice.
  - **Dropdown List**: Choices appear in a dropdown list; respondents can only select one answer.
  - **Select Box**: Choices appear in an item selection box; only one option can be selected.
  - **Multi Select Box**: Allows multiple answers to be selected.

- **Position**: This option is only visible when Single Answer or Multiple Answer is selected:
  - **Vertical**: Aligns choices vertically.
  - **Horizontal**: Aligns choices horizontally.
  - **Column**: Aligns choices in the number of columns you specify.

To Remove a Choice from Multiple Choice Question

1. Click in the answer choice. A down arrow will appear on the right of the answer choice.
2. Click the **down arrow** and select **Remove Choice**.

⊗ **WARNING:** After you have published a survey, deleting an answer choice will delete the data associated with that answer choice.

Allow Text Entry on Multiple Choice Question

Allow Text Entry places a text box next to an answer choice so that respondents can enter their own information. This is most commonly used when the answer choice of "Other" is available for the question.

To Use Allow Text Entry

1. Click on an answer choice to edit it.
2. Click the **down arrow** to the right.
3. Select **Allow Text Entry**.

> Text entered into the text entry boxes will be placed in an extra column when you download your data.

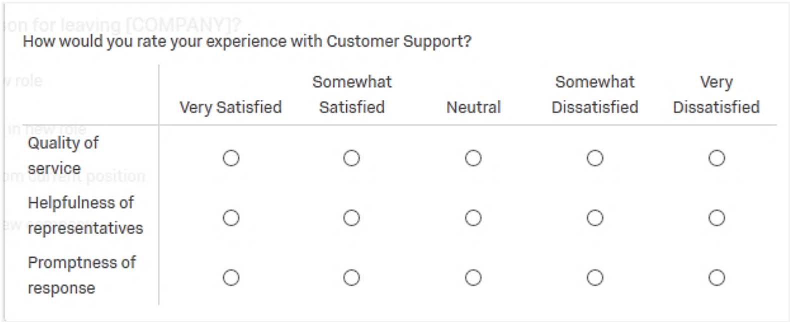
Matrix Table

A Matrix Table allows you to ask about multiple items in one question. Questions are presented in rows and the rating scale appears in columns. All items use the same rating scale.

Even though matrix table questions are common, they may reduce survey accessibility and make surveys appear more challenging to complete. Instead of using matrix tables, you could split the individual items into separate multiple choice questions.

Types of Matrix Tables

- **Likert**: Likert tables are designed to measure a respondent's opinion, usually on a scale that indicates their level of agreement or disagreement with the statements (such as, Agree … Disagree, Satisfied … Dissatisfied).

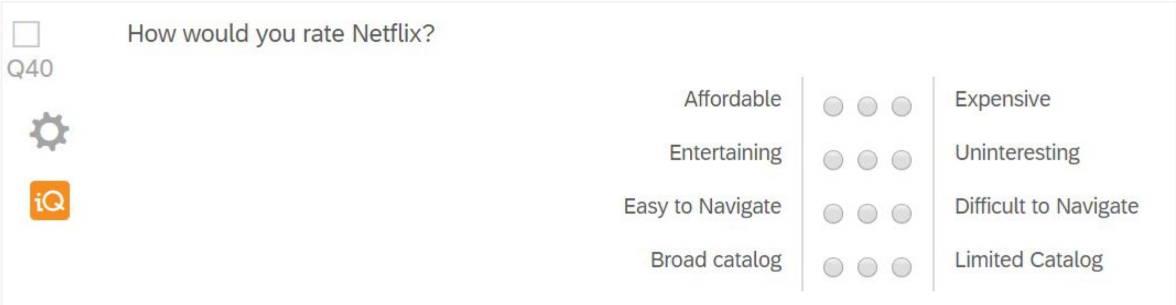


Example of a Likert table

If you do use a Likert question type, keep the number of rating points to a minimum. For example, you can simplify a scale of "Strongly Disagree," "Disagree," "Neutral," "Agree," "Strongly Agree" and instead, use "Disagree," Neutral," "Agree").

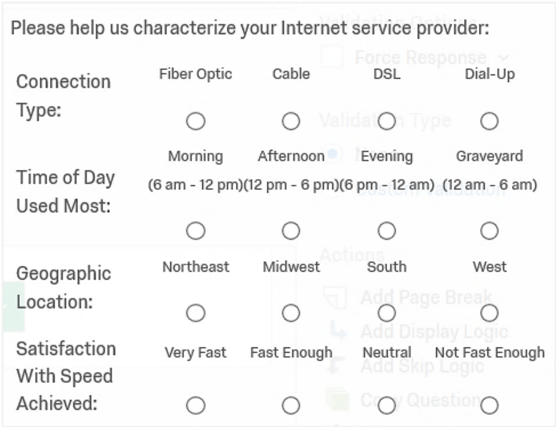
Choose the Mobile Friendly option, so the questions will be formatted in an accordion dropdown style instead of requiring the respondent to scroll to see an entire question.

- **Bipolar**: Allows you to place two choices at the opposite end of a scale. The respondent can then choose from the options in between the two scale points.



Example of a Bipolar question

- **Profile**: Allows you to use a different label for each row of scale points. Profile questions can be a Drop Down, Single Answer, or Multiple Answer



Example of a Profile question

- **MaxDiff**: Presents respondents with a list of items at two extremes. In this example, the points are Least Preferred and Most Preferred:

Example of a MaxDiff question

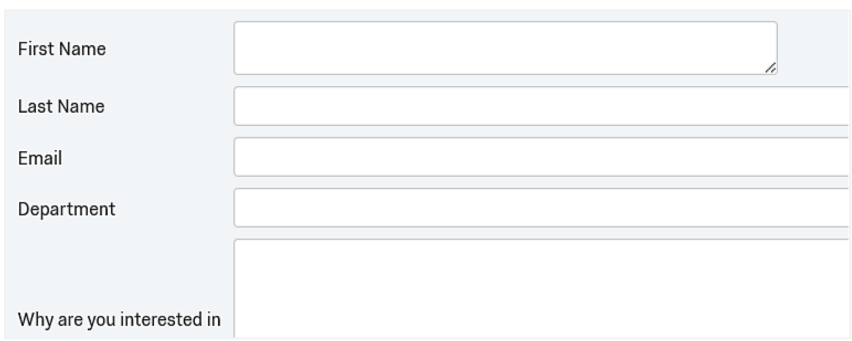
Text Entry

Text Entry questions allow respondents to type in comments or other information.

Example of a Text Entry question

Types of Text Entry Questions:

- **Single Line**: Is suitable for small amounts of text since it displays text on one line.
- **Multi-Line**: Displays text on multiple lines.
- **Essay Text Box**: Allows for larger amounts of text for longer responses.
- **Form**: Allows you to create a form with multiple text entry fields. This is useful for collecting contact information. Instead of creating a separate text entry question for each field you can use the form type to collect the info in one question. Each box can be expanded by clicking and dragging on its edge to right for longer text and/or down to create an essay box.

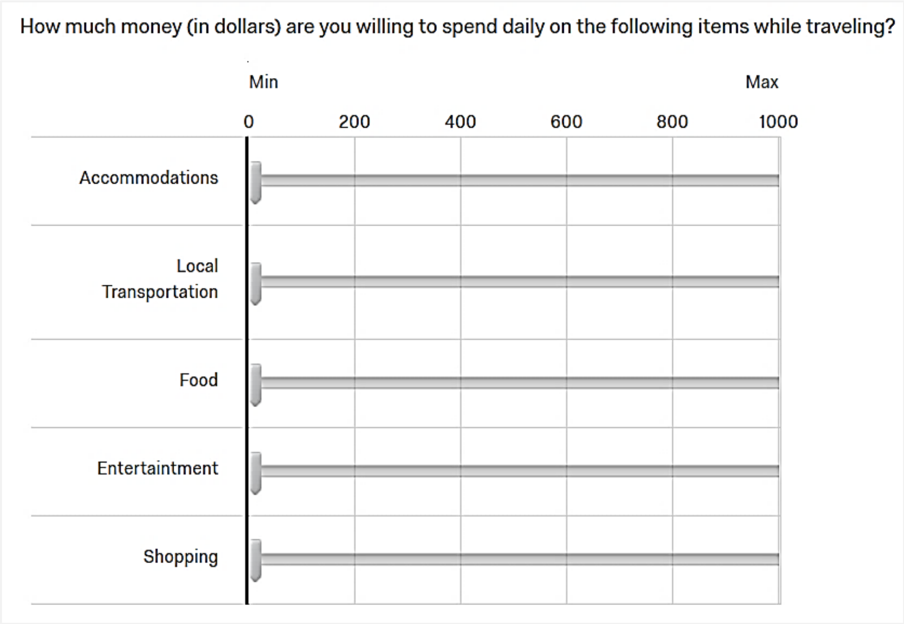


Form field example

- **Password**: The entered text will appear masked like a password (example: *******).

Slider

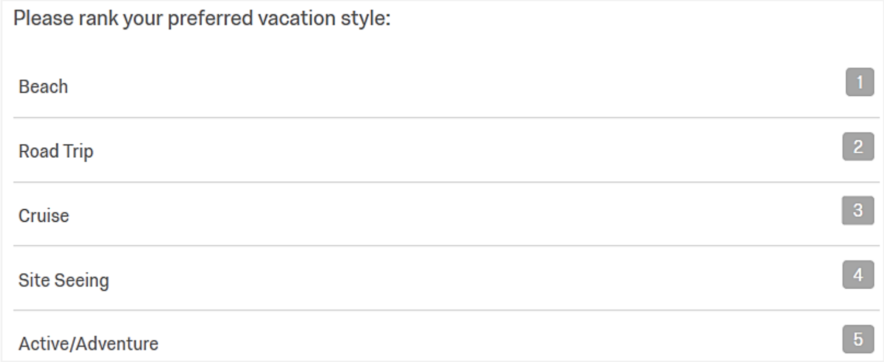
Slider questions allow respondents to drag sliders or bars to express their answers.



Example of a Slider question

Rank Order

Rank Order questions allow respondents to rank items by order of preference.



Example of Rank Order question

Types of Rank Order Questions:

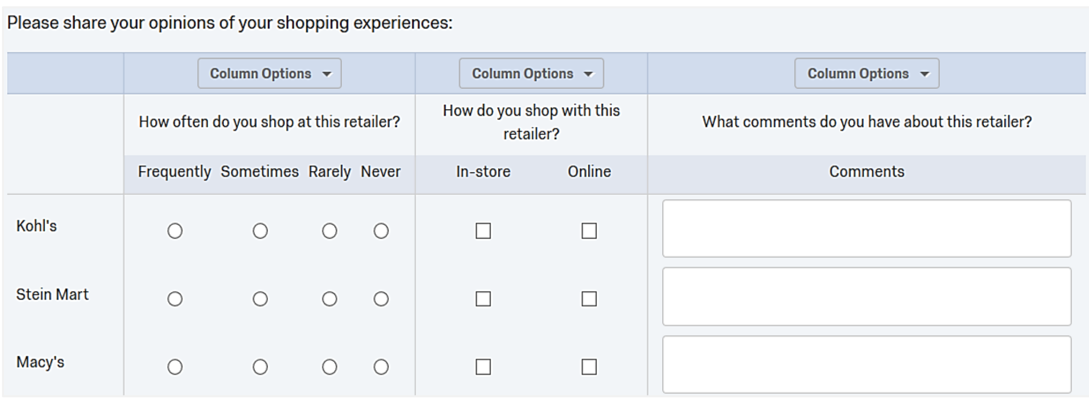
- **Drag and Drop**: Respondents can drag and drop choices into rank order.
- **Radio Buttons**: Respondents can rank the statements by clicking on radio buttons
- **Text Box**: Respondents can rank statements by typing in a number.

Side by Side

Side by Side questions allows you to place multiple questions beside each other in a table. The row statements are the same across all columns, but the scale is different for each column.

Responses can be a Drop Down List, Single Answer, Multiple Answer or Open Ended Text.

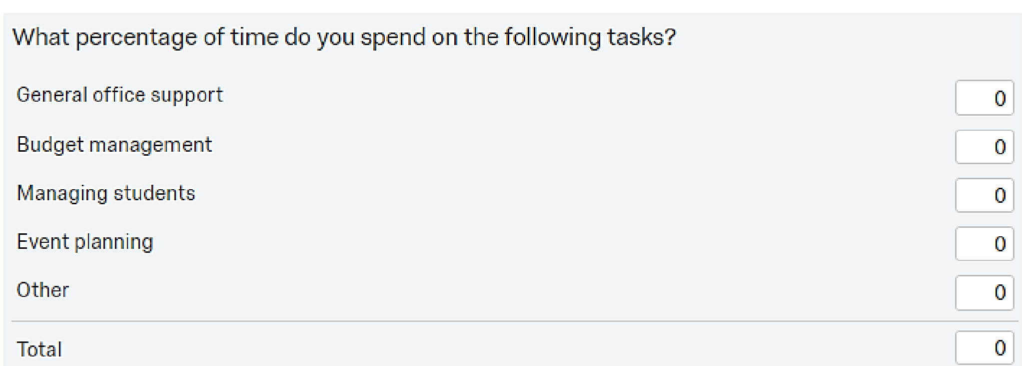
To access the question options, click on the **Column Options** drop-down at the top of each column.



Example of Side by Side question

Constant Sum

The Constant Sum question allows respondents to enter numeric responses to produce a total. In this example, the values must total 100, but you can specify what the total should be, or omit the total row.



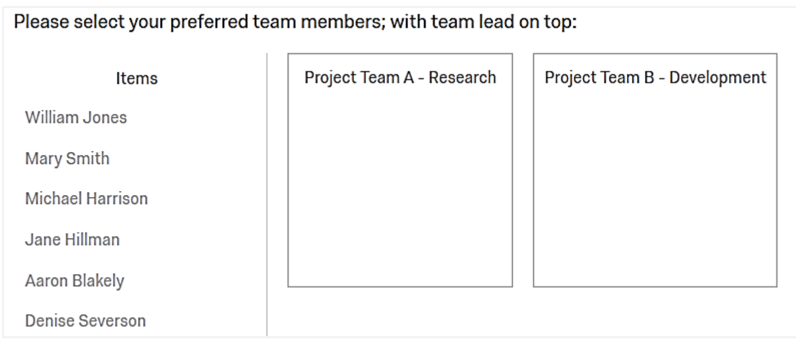
Example of Constant Sum question

Constant Sum Options:

- **Choices**: Allows respondent to type in a value. A Total box can be displayed, if desired
- **Bars**: Displays adjustable bars the respondent can slide left to right.
- **Sliders**: Displays sliders the respondent can slide left to right.

Pick, Group, and Rank

The Pick, Group, & Rank question type allows respondents to place choices in a group and rank them within the group, by dragging and dropping (Figure 4-9).



Example of Pick, Group, and Rank question

Hot Spot

Hot spots allow respondents to click on specific areas of a picture to indicate their likes or dislikes. Multiple areas can be selected.

Example of Hot Spot question without and with regions selected

Types of Hot Spot Questions:

- **On/Off:** Respondents can "turn on" or "turn off" certain areas by clicking.
    - Green = On
    - No color = Off
- **Like/Dislike:** Respondents can "like" or "dislike" certain areas by clicking once or twice.
    - Green = Like (one click)
    - Red = Dislike (two clicks)
    - No color = neither Like nor Dislike

Heat Map

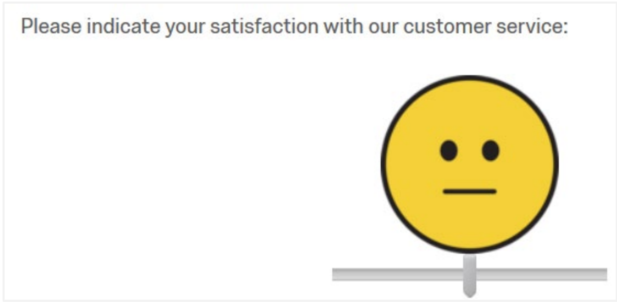
The Heat Map lets you insert a picture that the respondent can click on to indicate the area they prefer the most.

This is useful for assessing the design effectiveness of advertisements and websites. In this example, the respondent has selected the fireworks area as the best area:

Example of Heat Map with preferred area selected (green)

Graphic Slider

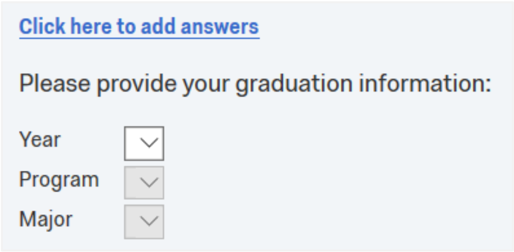
The Graphic Slider allows respondents to express their answers using graphics such as smiley faces, gauges, or grades.



Example of Graphic Slider question

Drill Down

The Drill Down question type allows respondents to choose an answer option by narrowing down from a general category to a specific category (Figure 4-11). To use this question type, you must upload a Comma Separated Values (.csv) file that contains all possible combinations of answers within the various categories.



Example of a Drill Down question

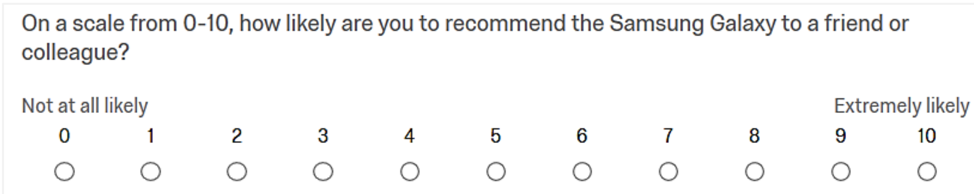
In this example, majors are used as answer choice options according to their program and the students' graduation year.

11	2020	Business	Accounting
12	2020	Business	AST
13	2020	Engineering	Mechanical Tech
14	2020	Engineering	Civil Tech
15	2020	ICS	Computing & Info
16	2020	NTID	Mobile Apps
17	2020	Liberal Arts	Communication
18	2020	Liberal Arts	Journalism
19	2020	Liberal Arts	Criminal Justice
20	2020	Liberal Arts	Advertising/Public Relations
21	2021	Business	Accounting
22	2021	Business	AST
23	2021	Engineering	Mechanical Tech
24	2021	Engineering	Civil Tech

Example format for Drill Down question

Net Promoter Score®

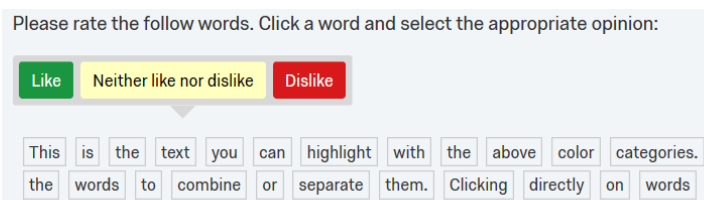
A Net Promoter Score® is a measure used to gauge customer satisfaction. The Net Promoter Score® question asks how likely a respondent is willing to recommend a product to others. The question automatically has an 11-point scale.



Example of a Net Promoter Score® question

Highlight

Highlight questions show respondents a series of words for them to rate using a color scale. The colors and labels of the rating scale can be customized.



Example of Highlight question

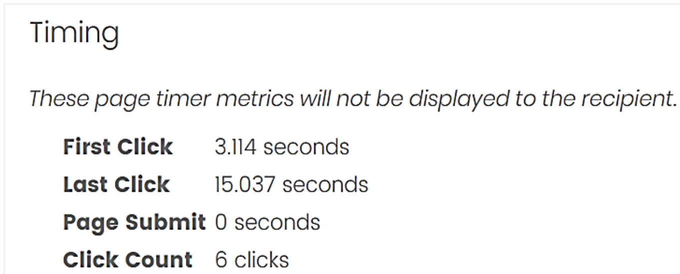
Signature

The Signature question type allows respondents to sign the survey by drawing with their mouse or stylus. The size of the signature box can be set to Small, Medium, or Large.

Example of Signature question

Timing

Timing questions allow you to record the amount of time a respondent spent on a page. The question and timing are not displayed to the participant. For details on how to use Timing questions, see the [Qualtrics tutorial](#).

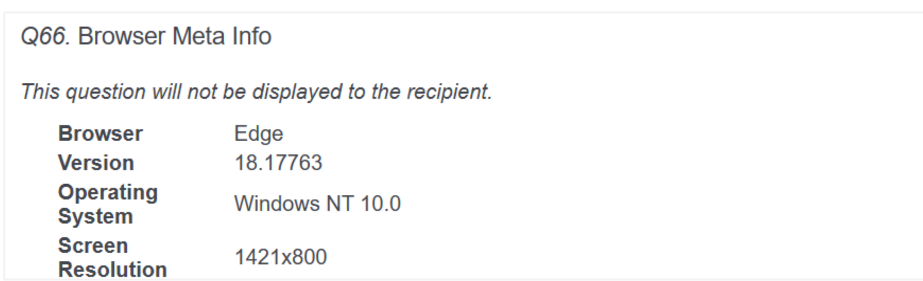


Example of Timing report

If you need to record the time a respondent spent on the entire survey (instead of just a page) [add an Embedded Data element](#) to your Survey Flow named Q_TotalDuration. The Q_TotalDuration field will automatically track the time it takes to complete the survey. This includes time spent away from the survey, if the user closes the survey and returns. The Q_TotalDuration field will be available in reports and when you export survey data.

Meta Info

Meta Info collects information on how the respondent is accessing your survey.
The question is not displayed to the respondent. Data collected include which browser and operating system are being used.



Example of Meta Info

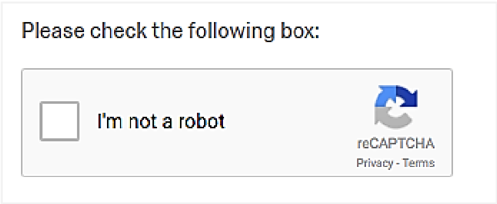
File Upload

The File Upload question type allows respondents to attach a file to their survey response. You can then download the file from the report.

Example of File Upload prompt

CAPTCHA Verification

CAPTCHAs (completely automated public Turing test to tell computers and humans apart) are used to prevent hacking and spam. They ensure the item is being completed by a human and not a machine. CAPTCHAs require the respondent to complete a challenge to proceed. These challenges are commonly in the form of a checkbox, a simple math problem, or a series of photos that must be selected.



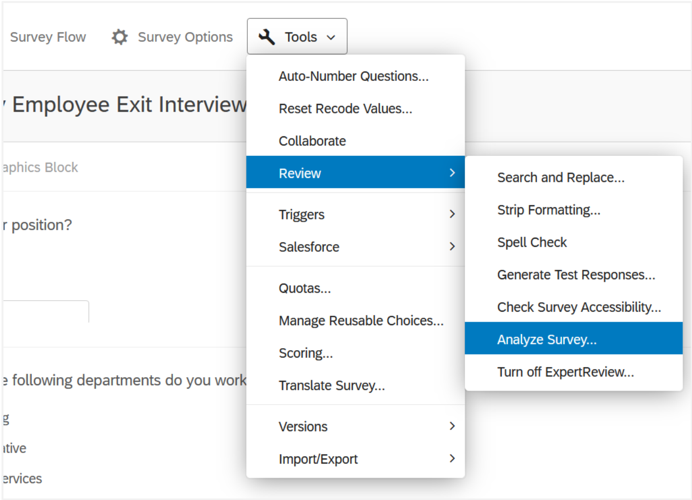
Example of CAPTCHA verification

Appendix D - Survey Optimization

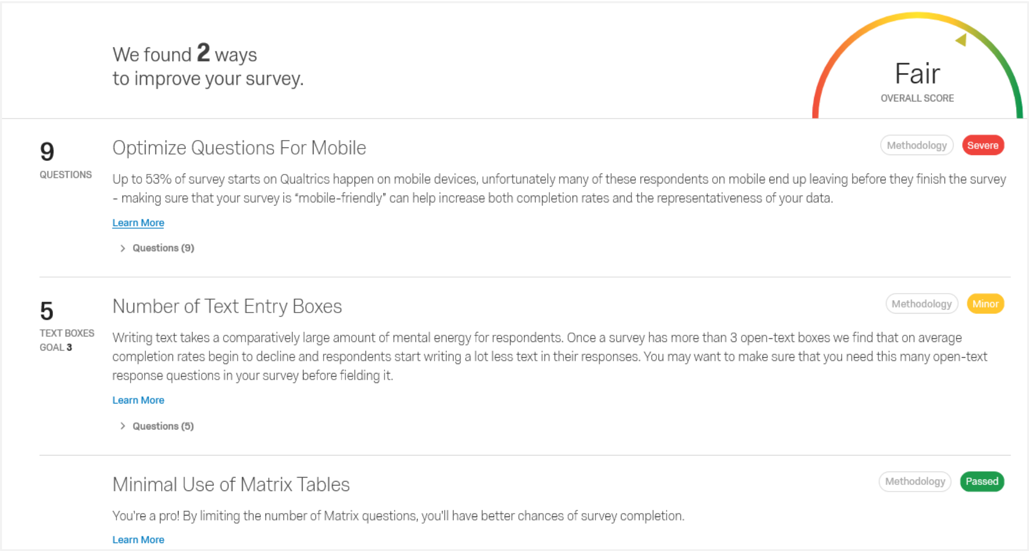
Survey Optimization is helpful for ensuring your survey is appropriately designed for mobile devices and for reducing survey fatigue. The optimization tool analyzes your survey and provides suggestions for improvement. The analysis includes reviewing the number of text entry boxes, accessibility, mobile friendliness, predicted duration, and whether question text is clear and concise.

To Launch the Survey Optimization Analyzer

1. Click **Tools**, **Review**, **Analyze Survey**.



2. Click on > **Questions** and **Learn More** to see the issues that need to be resolved.



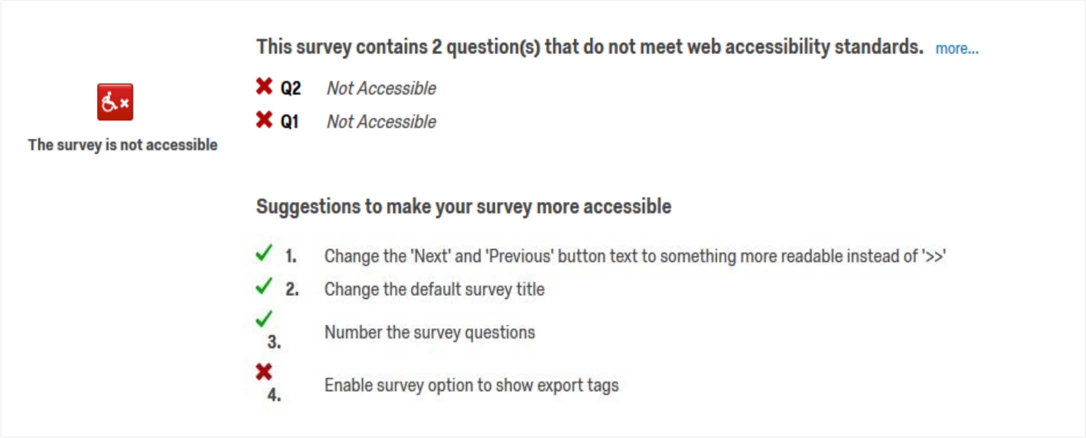
3. Follow the recommendations that will appear and reanalyze the survey.

Appendix E - Survey Accessibility

To ensure your survey is accessible to respondents who use adaptive technologies, like screen readers, use the Check Survey Accessibility feature. It reviews your survey and provides information and recommendations based on [Web Content Accessibility Guidelines (WCAG) 2.0 AA (Section 508)](). Accessible survey types are shown on the next page.

To Check Survey Accessibility

1. In the **Survey** tab, click **Tools**.
2. Select **Review**.
3. Click **Check Survey Accessibility**.
4. Examine the list of potential problems and the recommendations for making your survey more accessible:



5. Click directly on a suggestion to go to the location in your survey that needs to be changed.
6. Select **Done** or **Recheck** when you are finished with your edits.

Accessible Question Types	Non-Accessible Question Types
○ Descriptive Text	○ Bipolar, MaxDiff, Likert, Drag and Drop Matrix Tables
○ Multiple Choice (all Types)	○ Slider
○ Net Promoter® Score	○ Rank Order (Drag and Drop and Select Box)
○ Rank Order, Constant Sum, Text Entry, and Profile	○ Constant Sum (Sliders and Bars)
○ Text Entry (All Types)	○ Pick, Group & Rank
○ Rank Order (only Text Entry, Graphic, and Radio)	○ Hot Spot
○ Side By Side	○ Heat Map
○ Constant Sum (only Text)	○ Graphic Slider
○ Drill Down	○ Signature
○ Timing	○ Highlight
○ Meta Info	○ File Upload
○ Captcha Verification (v2)	

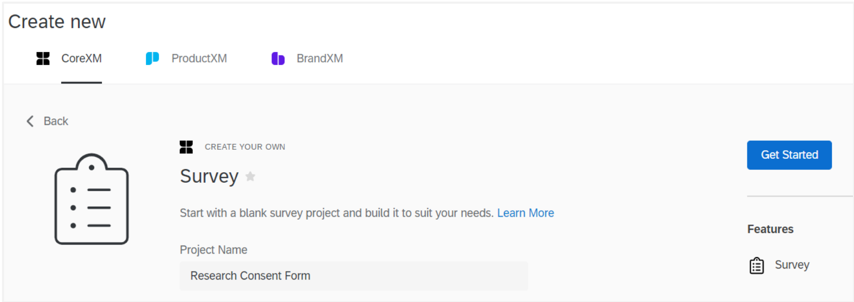
Appendix F - Build a Consent Form Using Skip Logic

Skip Logic can be used to build Consent Forms or other agreement forms such as Terms and Conditions or Release Forms.

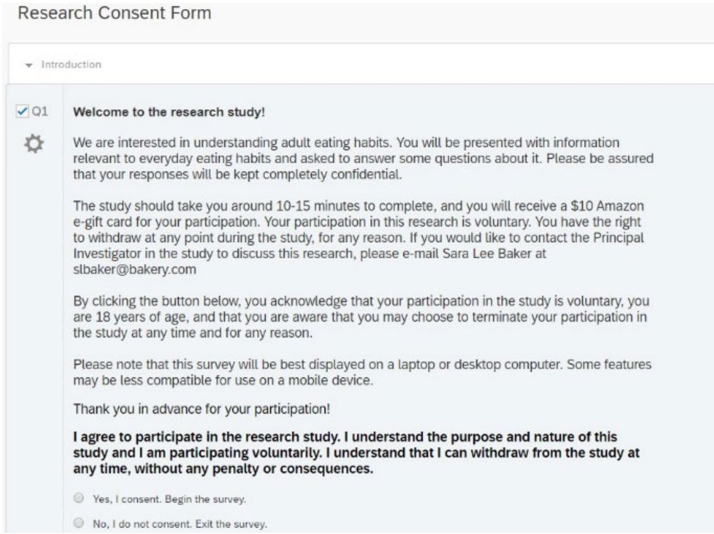
NOTE: Qualtrics has an Informed Consent Form template that can be customized, but it is easier to create your form from scratch than to modify the Qualtrics template!

To Build a Consent Form

1. From the main project list, click **Create a new project**.
2. Click the **Survey** button.
3. Enter the Project name and click **Get Started**.



4. From the questions option pane on the right, change the answer choices to **2** by typing over the existing number or clicking the minus sign (–) to delete choices.
5. Make sure the **Automatic Choices** box is unchecked.
6. Click the text of the choices and change them to the desired options. For example, type “Yes, I consent” or “No, I do not consent.”
1. Click where it says **Click to write the question text** and enter the introductory message, the consent information, terms and conditions, etc.



2. Click the gear icon to the left of the consent question.
3. Select **Add Skip Logic**.
4. The click Condition statement and select the choice for **no consent**: “No, I do not consent.”

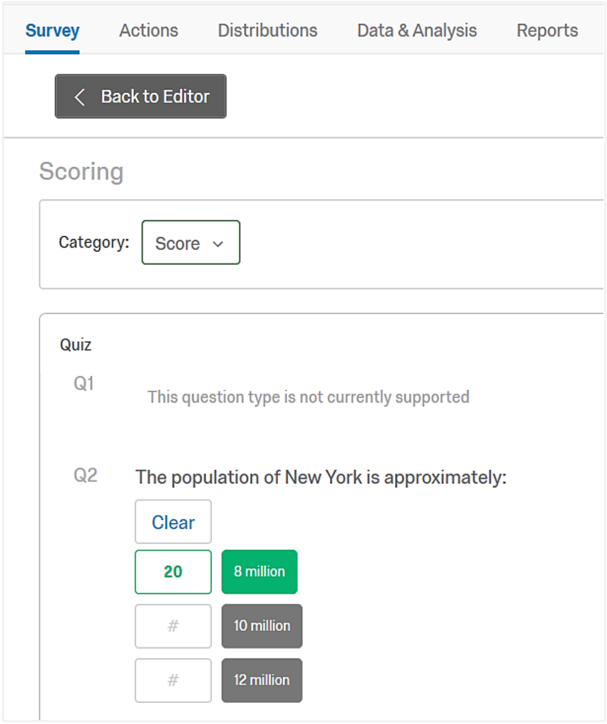
5. Select **Is Selected**.
6. Choose Skip To: **End of Survey**.
7. In the question options pane to the right, select **Force Response**, so respondents cannot continue if they have not provided consent.
8. Continue adding the rest of your questions to the survey.
9. **Preview** the survey (and remember to remove any test responses you generate).

Appendix G - Creating a Quiz With Scoring

With the Scoring tool, you can assign grades or numeric values to individual answer choices so they can be totaled for a score or grade. Scoring is available for the following question types: Multiple Choice, Matrix-Likert, Matrix-Bipolar, all Text Entry questions—except Form, Slider-Draggable Sliders, Side by Side, and Net Promoter Score®.

When a survey is set up as a quiz, you can show respondents their score after each question or at the end of the survey. The correct answers can also be displayed.

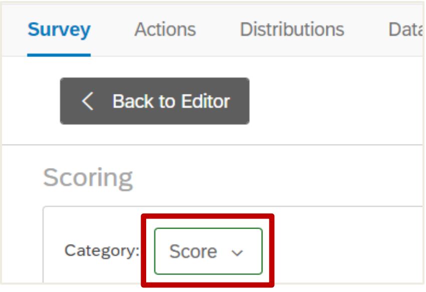
When the survey data is downloaded, additional columns are provided to show the Sum, Weighted Average, and the Weighted Standard Deviation scores for each respondent.



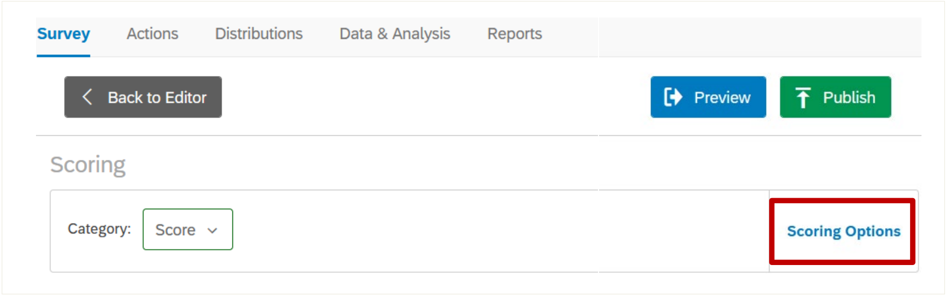
Example of Applying scores to survey responses.

To Use Scoring

1. Go to the **Tools** tab.
2. Select **Scoring**.
3. Choose **Score** from the dropdown on the Scoring toolbar.



4. Assign a score to the answer choices:
   - For **Multiple Choice and Matrix questions**, click on the grayed-out numeric value to enter a value. This turns on Scoring for that particular choice. The default value is “1.”
   - For **Text Entry questions**, enter the score along with the potential text responses to use for grading
     - Click the “+” button to add additional potential answers and numeric scores
5. Click the **Scoring Options** link near the top of the screen:

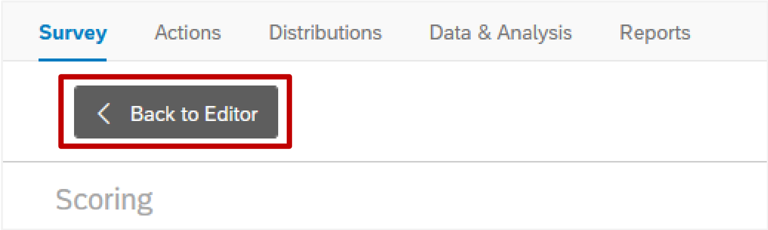


6. Under **Show Scoring Summary for Category**, select the desired reporting options:
   - **Score:** Score will be selected by default.
   - **At the End of the Survey**: Displays the score summary at the end of the survey.
   - **After Every Question**: Displays the score summary after every question. This includes the total score for that individual question.

   NOTE: For multiple questions on the same page, the next page will show multiple summaries on the same page.

7. Click **Save**.

8. Click the **Back to Editor** button, above the scoring menu, to return to editing the survey.



9. Preview the survey to see how the scoring report will work.

   > **To turn off scoring**: Go to **Tools**, **Scoring** and click on the text of the answer choice that has been scored. To turn scoring back on, click the answer choice text for that item.

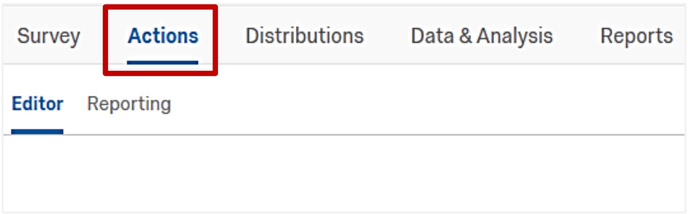
Appendix H - Email Respondents a Copy of Their Submission

By setting up Email Tasks, you can send respondents a report that contains a copy of their survey responses. **To send the report, your survey must have a question that collects the respondents' email addresses**.

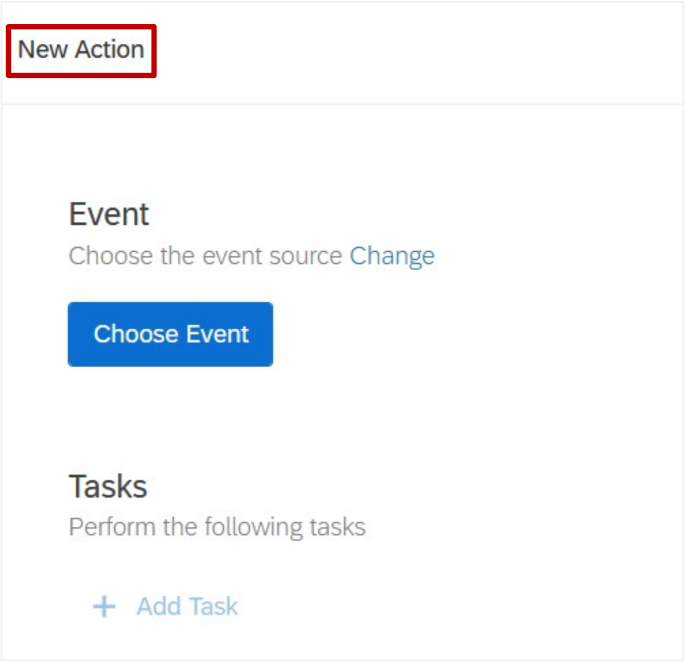
Response Reports contain Recipient Data (such as date the survey was completed), the Response Summary, and Embedded Data.

To Send Respondents a Response Report

1. Open the survey.
2. Click the **Actions** tab (not the Actions page at the top on the screen!).



3. Click **Add Action**.
4. Type over the text where it says "New Action" to enter **title** for the action.



5. Click **Choose Event**.

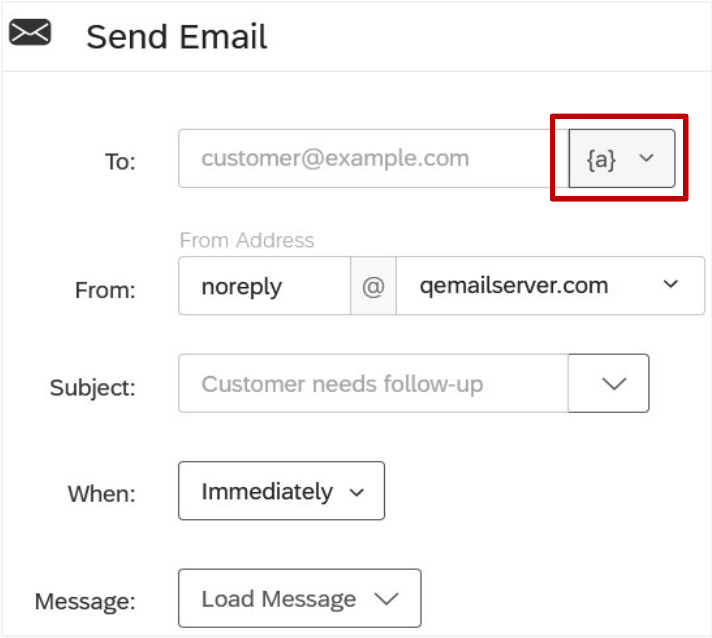
6. Select the Event Type: **Survey Response**.

7. Skip the Conditions option so that all survey responses will trigger the task you are about to set.

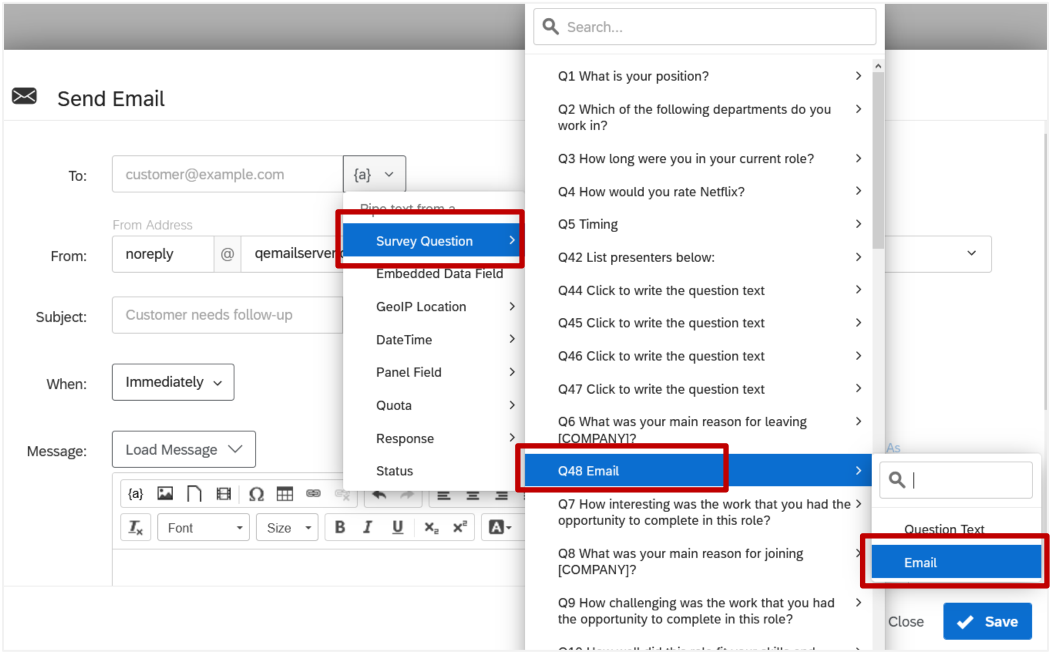
8. Click **Add Task**.

9. Click **Email**.

10. Click the **Piped text** button.



11. Select **Survey Question** and navigate to the question that collects the respondent's email address.



12. Enter the **From Address, From Name,** and **Reply-To Email**.

NOTE: If you do not want to receive replies, you can leave the default from Qualtrics: noreply @ qemailserver.com

13. Type a **Subject** for the email.

14. Choose **when** the survey response will go out.

15. Write your survey message in the text editor.

16. Check **Include Response Report** (at the bottom of the Send Email window) to add a summary of the questions and respondent's answers to email. This will also provide a link to download the responses as a PDF/online version).

NOTE: The Respondent data option will include the Response ID, Date/Time survey was completed, and the respondents' IP address, as shown in this example:

Response ID	R_2t8PzM8LkDrQCtL
End Date	2020-05-15T21:09:22Z
IP Address	98.11.203.224

17. Set an **Expiration** date, if desired.

18. Click **Save**.

Appendix I - Using Loop and Merge to Repeat Questions

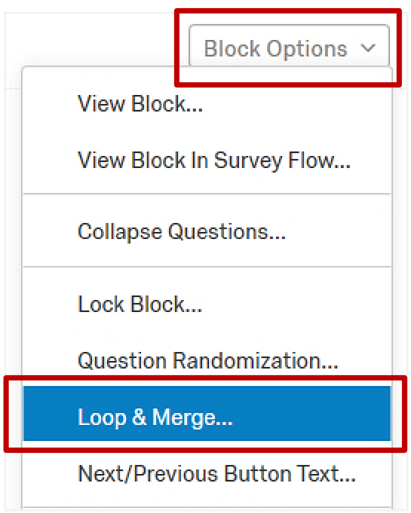
Loop and Merge can be used to repeat the same block of questions. This saves time in the survey creation process by eliminating the need to retype the questions for each possible response. The questions can be repeated based on a response to a question, or they can be repeated to pose the same questions for various items. There are two Loop & Merge methods:

- **Loop and Merge Based on a Question**: Repeats a block of questions according to each item the respondent selects in a previous question. For example, you could ask respondents to select which dining facilities they have visited and then display satisfaction questions for each of the facilities the respondents selected.
- **Static Loop and Merge**: The repeated block of questions is not based off of the respondent's selection on a previous question, but on a list of predefined options you provide. For example, you could present several products and ask the same questions about each product.

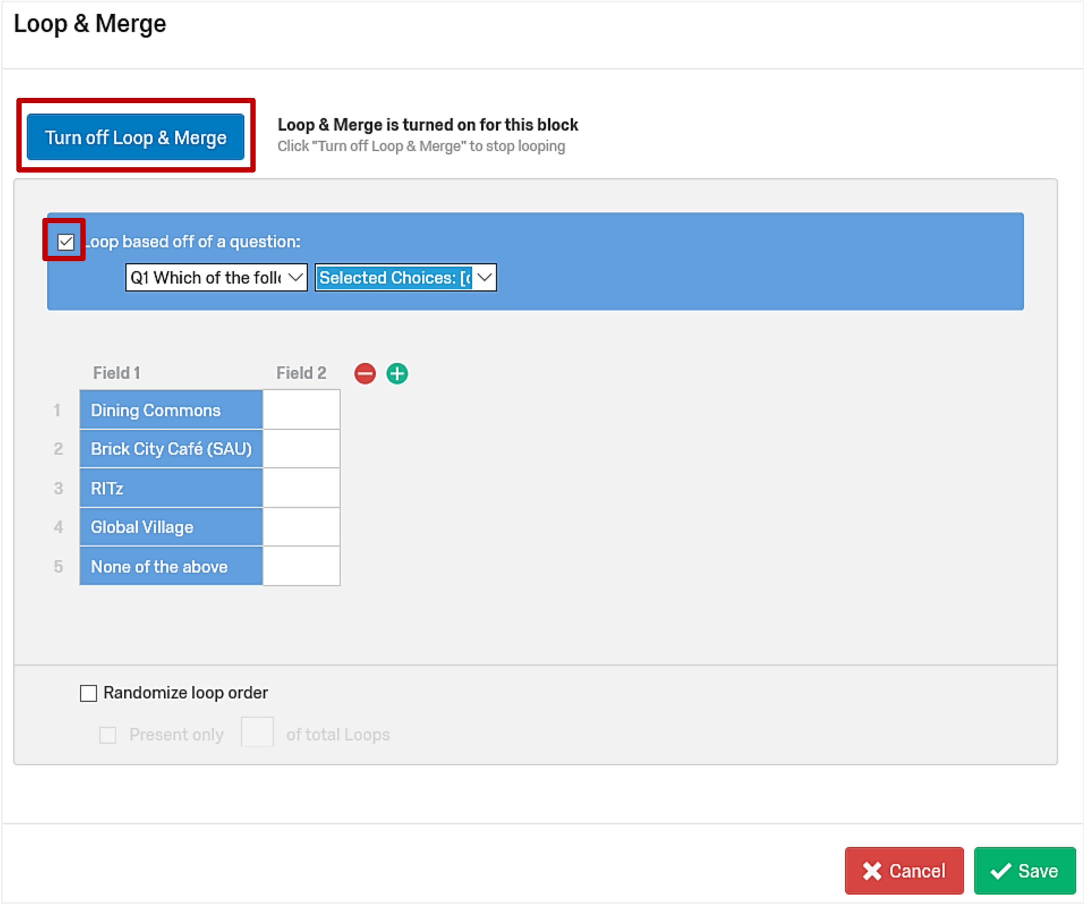
To Set Up a Loop and Merge Based on a Question

Loop and Merge Based on a Question requires two question blocks:

1. In the first block, create the question to base the looping on. For example, *Which of the following dining locations have you visited in the last 12 months? (select all that apply)*.
2. Add a second block. This block should contain the questions you want to loop through. For example, *Please rate the quality of food at location X*. This block will be looped for each dining facility selected in the first block.
3. From the **Block Options** dropdown, select **Loop & Merge**.



4. Click **Turn on Loop and Merge**.
5. Check the **Loop based off of a question** box.



6. From the first dropdown menu, select the question to base the loop on.
7. From the second dropdown menu, select the choices to use:
   - **All Choices - Displayed and Hidden**: The block will loop for all choices from the target question, selected and not selected.
   - **Displayed Choices**: Only loops through the choices that were displayed in the target question. You can only choose this option if you used Display Logic on answer choices in the target question.
   - **Not displayed Choices**: If logic is used to display choices that meet a specific condition, show undisplayed choices.
   - **Selected Choices**: The block loops only for responses selected in the target question. This option is chosen most-often.
   - **Unselected Choices**: The block loops only for responses that were not selected in the target question.

8. **Randomize Loop Order**: The default is to loop the block in the order of the choices selected in the target question. Select this option to randomize that looping order. If you select Randomize loop order, the following option becomes available:
    - To loop the block only for a specified number of the choices (according to the All Choices, Selected Choices, and Unselected Choices options), check **Present only** and enter the number of total loops.
9. Click the **Save** button.

Pipe in Answer Choice

To show respondents which items they are looping through, you must pipe in the answer choice item in the questions in the looping block. For example, to add the facility name to the question: *Please give us your opinion of XX dining facility*, you will pipe in the field that contains the facility name the respondent selected.

To Pipe in the Answer Choice into the Looping Block:

1. Click on the question text (in your loop and merge block).
2. Place the cursor where you would like the piped text to appear.
3. Click the **Piped Text** tab.

4. Navigate to **Loop & Merge Field**, **Loop & Merge Fields**.
5. Select **Field 1**.
6. The pipe text code will appear.
7. Repeat steps 1-5 if you have other fields to pipe in.

Static Loop and Merge

Static Loop and Merge allows you to create a list of items to ask questions about and then loop through the questions. This type of loop is not based off of selected answers in a previous question. Also, the item text must be piped into the questions so the respondents know which item they are evaluating.

Q1. How familiar are you with the following RIT Benefits:

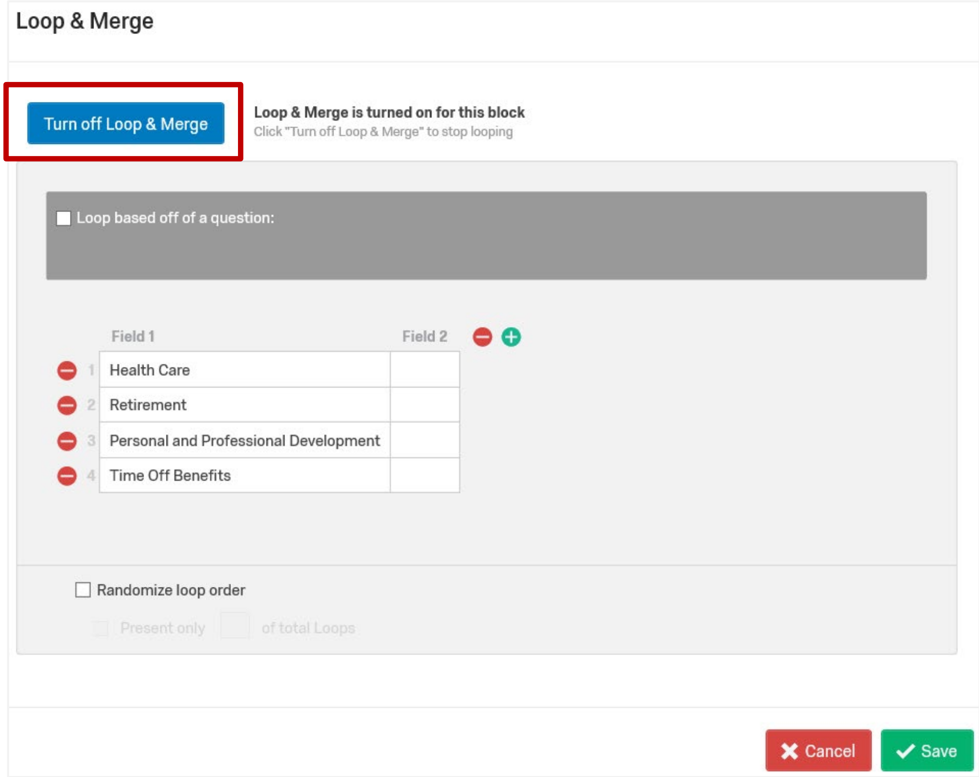
- Health Care
- Retirement
- Personal and Professional Development
- Time Off Benefits
- What is your overall impression of XXX

Q2.-Q6. What is your overall impression of … (health care, retirement, etc.)

Example of questions to loop through

To Set Up a Static Loop and Merge

1. Click **Block Options** dropdown and select **Loop & Merge**.
2. Click **Turn on Loop & Merge**.
3. In the Field1 column, enter the values to pipe into your questions. Example values: Health Care, Retirement, etc.



4. If you want to use randomization options, click the **Randomize loop order** box. The following option will appear:
   - To loop the block only for a specified number of the choices (according to All Choices, Selected Choices, and Unselected Choices options), check **Present only** and enter the number of total loops.
5. Click the **Save** button.
6. Follow the instructions on page 99 to pipe (insert) the answer choice into the question.

Carry Forward Choices

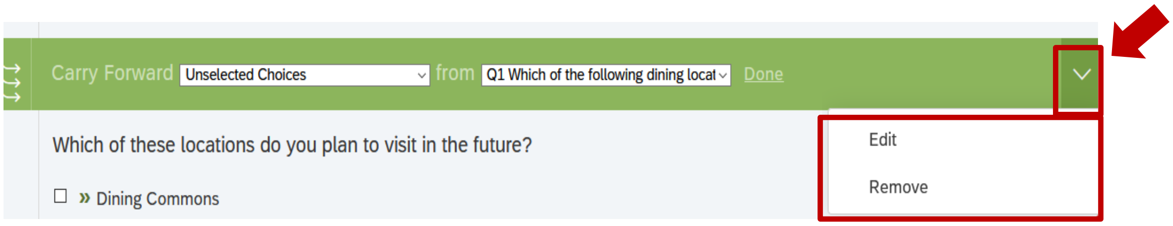
Carry Forward Choices lets you bring answer choices from one question into a future question. For example, you could show a question that asks your respondents which events they have attended and then carry their choices forward to a question that asks them to rank their previously-selected choices.

To Set up the Carry Forward Choices

1. Create the question that will contain the choices to carry forward.
2. Create a new question that will contain the forwarded questions. For this question type, choose **Multiple Choice** with **0** Choices.
3. Click the gear button to the left of the question you want to carry the choices to and select **Carry Forward Choices.**
4. On the green option bar that appears below the question, use the first dropdown to specify which **choices** to carry forward: All Choices - Displayed & Hidden, Displayed Choices, Not Displayed Choices, Selected Choices, or Unselected Choices. **Selected Choices** is the most commonly-selected option.
5. Use the second dropdown to select the **question** containing the choices you would like to carry forward.
6. Click **Done**.

To Edit or Delete Existing Carry Forward Choices Logic

1. Click the **down arrow** on the **Carry Forward Choices** option bar and select **Edit** or **Remove**.



NOTE: Carry Forward Choices can only draw from one question at a time.

Appendix J - Creating and Managing Contact Lists

Contact Lists enable you to send surveys to specific email addresses. Creating a contact list is helpful for sending follow-up messages and reminders.

There are three ways to create a contact list: Import from a File, Add Manually, or Import from a Survey. When you add a contact list, you have the option of creating a sample to see how the list should be formatted. Each method is described on the next page.

Contact List File Requirements

- Files must be saved as Comma Separated Values (.csv) or Tab Separated Values (.tsv).
- The contact file must contain a column with Email addresses.
- The first row must have the field names (headers) for each column.
- The maximum file size is 100 MB.
- All columns must have headers; all cells with values must have a column header.

Contact List Fields (Columns)

- **FirstName, LastName**
- **PrimaryEmail**
- **ExternalDataReference**: Extra information about the contact, such as an employee or student ID.
- **Additional Fields**: You can add additional fields (such as state, major, etc.) as needed. These become Embedded Data fields.

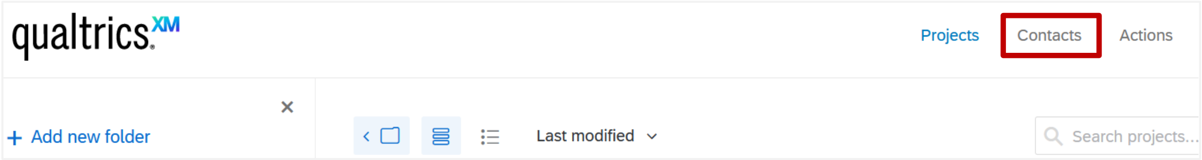
To Import Contacts from a File

1. Create a spreadsheet in Excel or another spreadsheet program such as Google Sheets.
2. Add the desired columns to the spreadsheet, such as Email, FirstName, and LastName

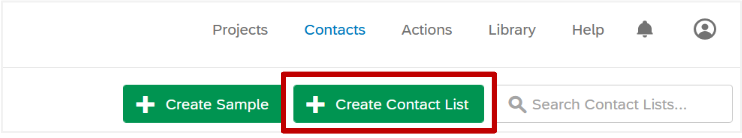
   ➲ **IMPORTANT!** Each contact **must** have an Email address. Other cells can be blank.

3. Add the information for each contact, with one row for each contact.
4. Save the file as a **Comma Separated Values (.csv)**.

5. In Qualtrics, click on the **Contacts** menu item.



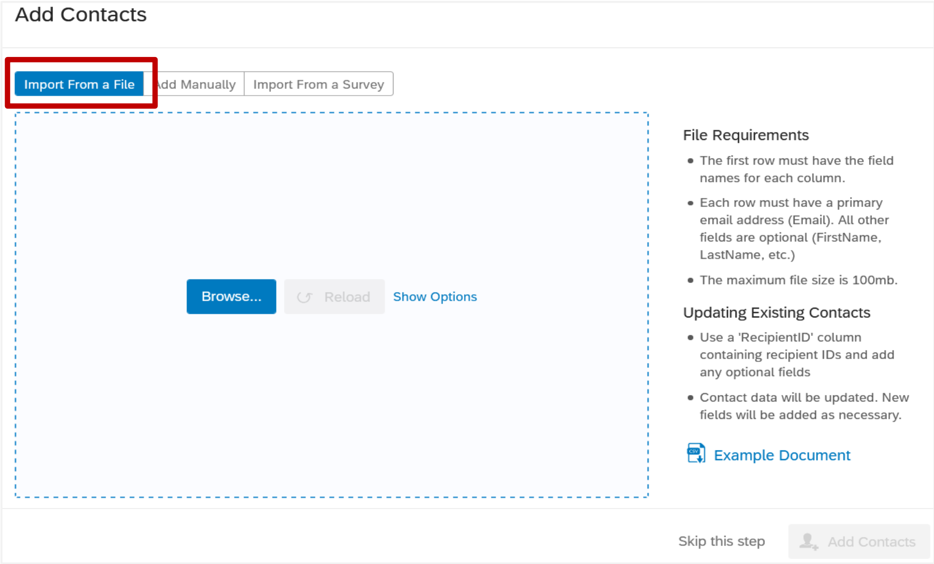
6. Click **Create Contact List**.



7. Enter a **name** for the list and select an existing folder, if desired.
(If no folder is selected, the list will be placed in the "Uncategorized" folder).

8. Click **Next**.

9. Click **Import from a File**.

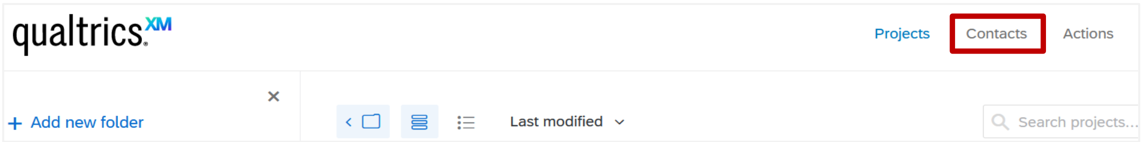


NOTE: Near the bottom of the Add Contacts window, there is an option for Example Document. You can use this to download a sample to see how a contact list should be formatted.

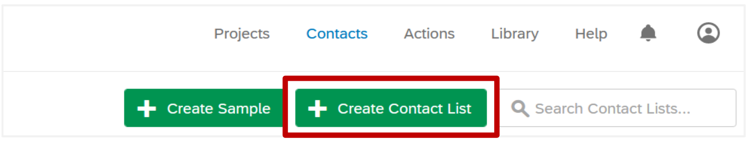
10. Click **Browse** and locate your contacts file.
11. Scroll down and review the information under **Verify Fields**. If there are any fields that were not properly matched, click on the field name and select the correct field from the dropdown.
12. Click **Add Contacts**.

To Add Contacts Manually

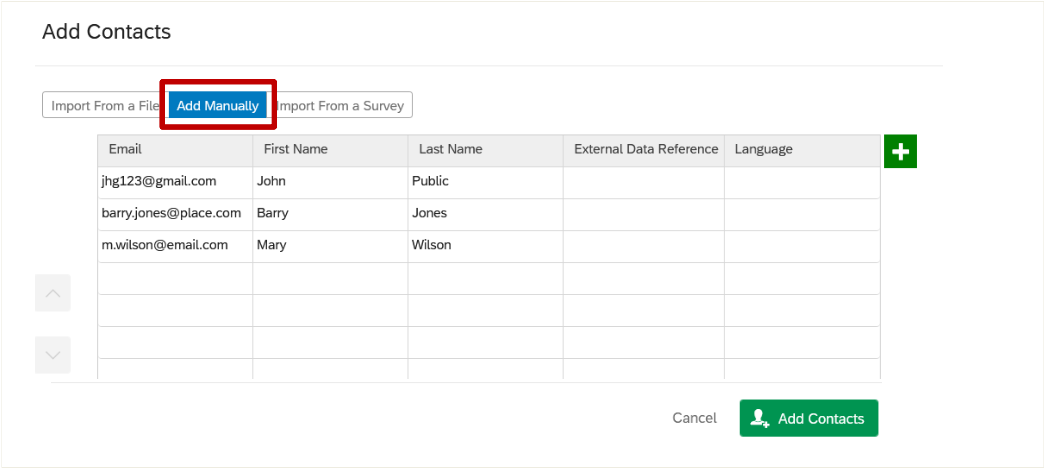
1. Click on the **Contacts** menu item.



2. Click **Create Contact List**.



3. Enter a name for the list and select an existing folder, if desired. (If no folder is selected, the list will be placed in the "Uncategorized" folder).
4. Click **Next**.
5. Click **Add Manually**.
6. Enter the contact information into the table. **Email is required**; other fields (columns) are optional. If you want to add additional columns, click the **green** + button next to the last column.



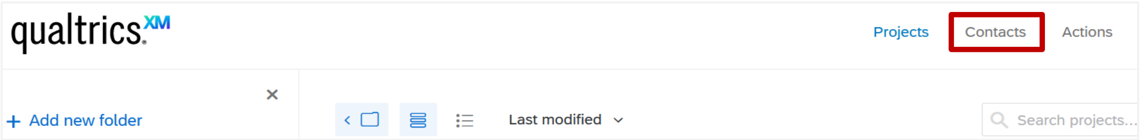
➲ **IMPORTANT!** Be sure to add all the necessary columns prior to continuing to the next step. You cannot add columns to the Contact List after you manually create it.

7. Click the **Add Contacts** button.

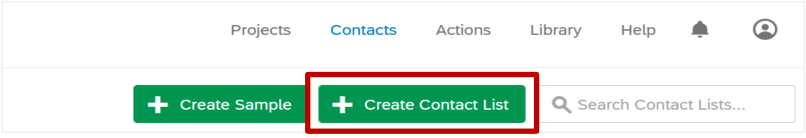
> The list of Contacts will appear. See page 106 for details about Contact List options.

Importing Contacts from a Survey

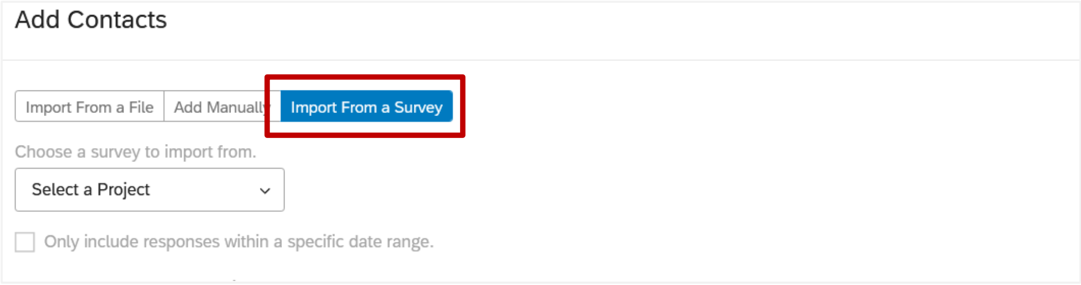
1. Click on the **Contacts** menu item.



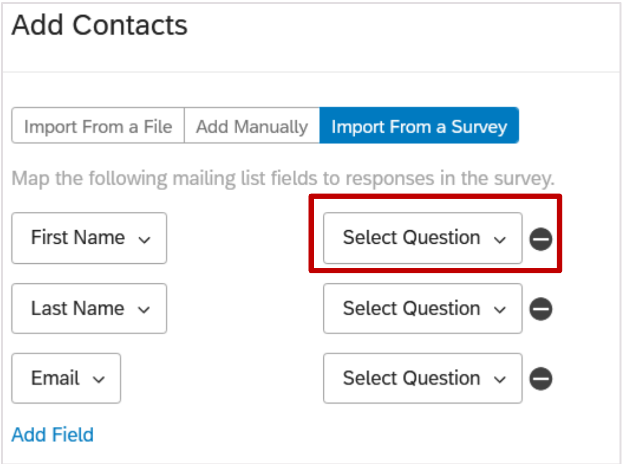
2. Click **Create Contact List**.

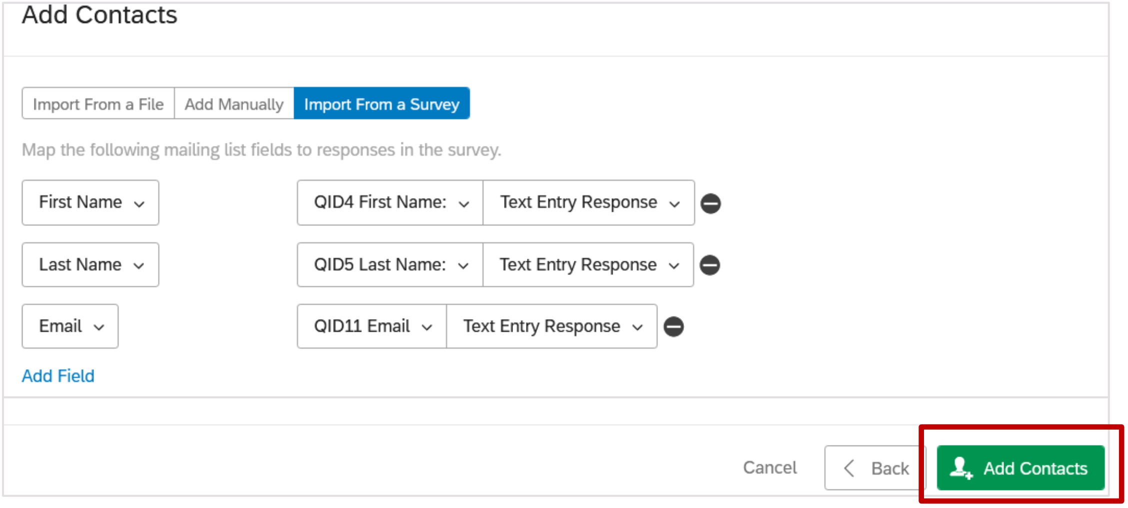


3. Click **Import From a Survey.**



4. Select a survey to import from.
5. Check **Only include responses within a specific date range**, then enter the dates, if you want to limit which responses you're building a contact list from.
6. Select either **Create new contacts** or **Update existing contacts**.
7. If desired, check **Add Contacts' Response History**.
8. Click **Next**.
9. Map the mailing list fields by selecting which questions in the survey collect the First Name, Last Name, and Email.



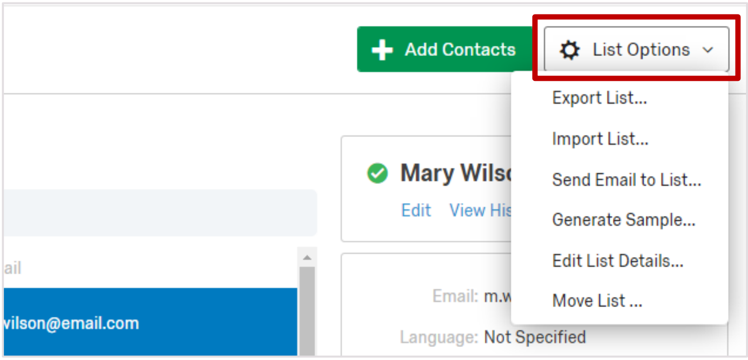


10. Click **Add Contacts**.

> The list of Contacts will appear. See below for details about Contact List options.

Contact List Options

Contact list options include Export List, Import List, Send Email to List, Generate Sample, Edit List Details, and Move List:



- **Export a List** - lets you save the contact list as a Comma Separated Values (.csv) file that can be imported into Qualtrics or sent to others. You can include embedded data and select the respondents' subscription status (All, Opted In, Opted Out).
- **Import List** - lets you import a contact list as described on page 102. The file type must be Comma Separated Values (.csv) or Tab Separated Values (.tsv).
- **Send Email to List** - sends a message to the contact list. This is described further on page **107**.
- **Generate Sample** - lets you create a subgroup of participants from your contact

list so you can target specific segments of your audience. For example, you could create a subgroup for Staff or a subgroup for those who have not responded to the survey yet.

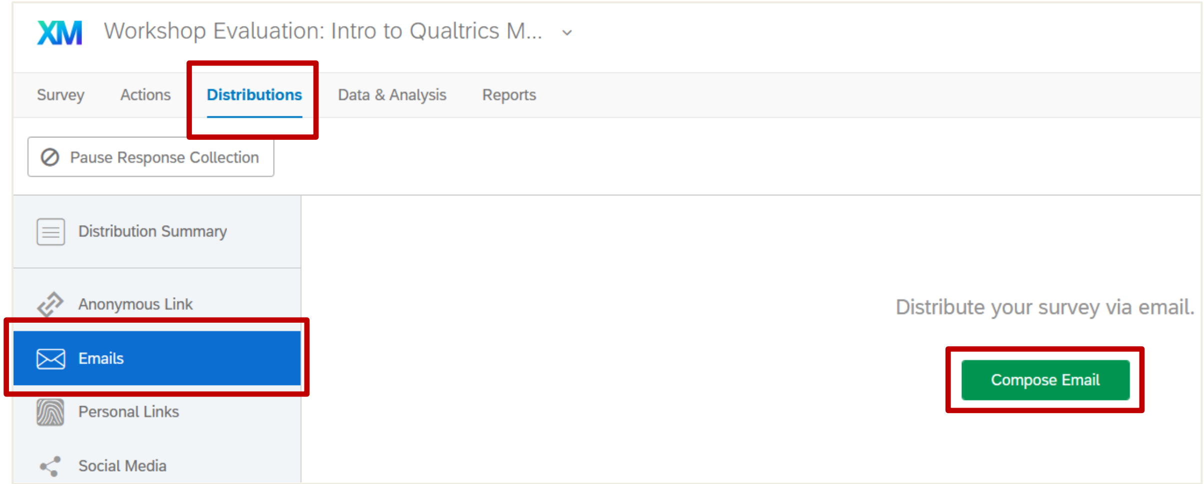
- **Edit List Details** - lets you change the list name or folder.
- **Move List** - moves the list to another Library (another group you have access to).

Emailing a Survey Invitation

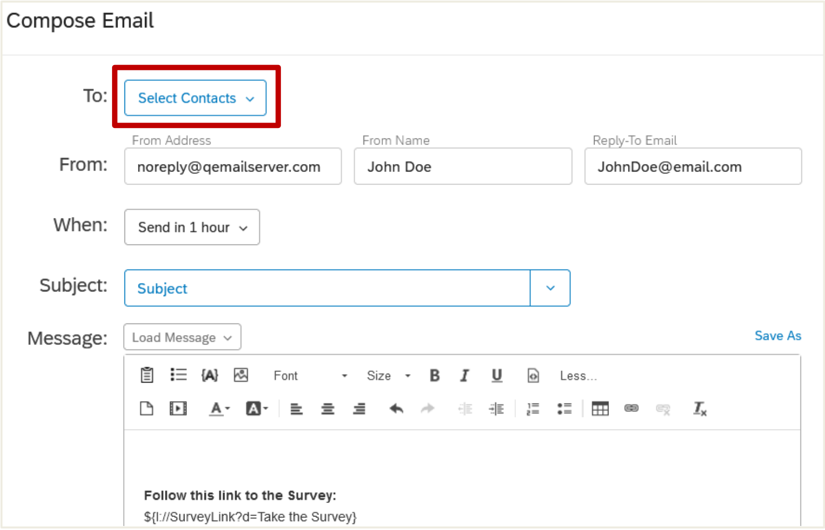
Survey invitations can be sent to a Contact List by using the Qualtrics Mailer. The Qualtrics mailer enables you to customize email invitations and track the responses.

To Send a Survey Invitation to a Contact List

1. Open the survey and click the **Distributions** tab.
2. Click the **Emails** menu item and click **Compose Email**.



3. Click **Select Contacts.**



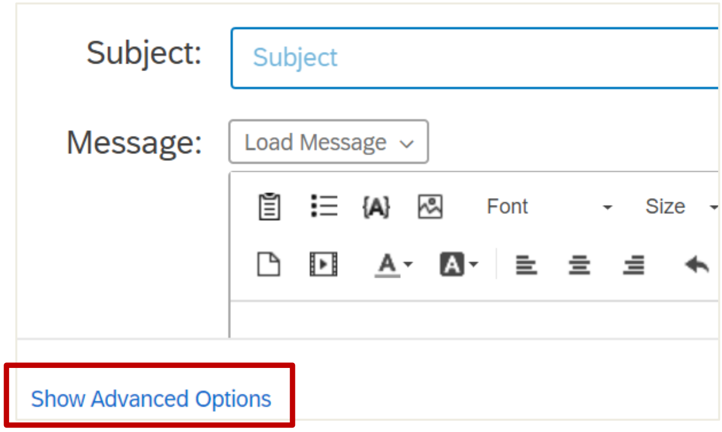
4. Choose your library (**My Library**: …).
5. Select the appropriate contact list.
6. Click **Select Entire Contact List**. Alternatively, you can choose Samples or select an individual contact.
7. The **From Address**, **From Name**, and **Reply-To Email** will be automatically populated. However, you can change the information.
8. Select the time you want the email distributed from the **When** dropdown. By default, your email will be sent in one hour.
9. Enter a **Subject** for your email.

   NOTE: The invitation will not be sent unless you enter a subject.

10. Type an invitation message in the Rich Content Editor (above "Follow this link to the Survey") or, choose **Load Message** to insert an email invitation from your Messages Library.
11. If you want to save the email invitation to reuse at a later date, click **Save As**, then select your **Library**, enter a message **Name**, and click **Save Message**.

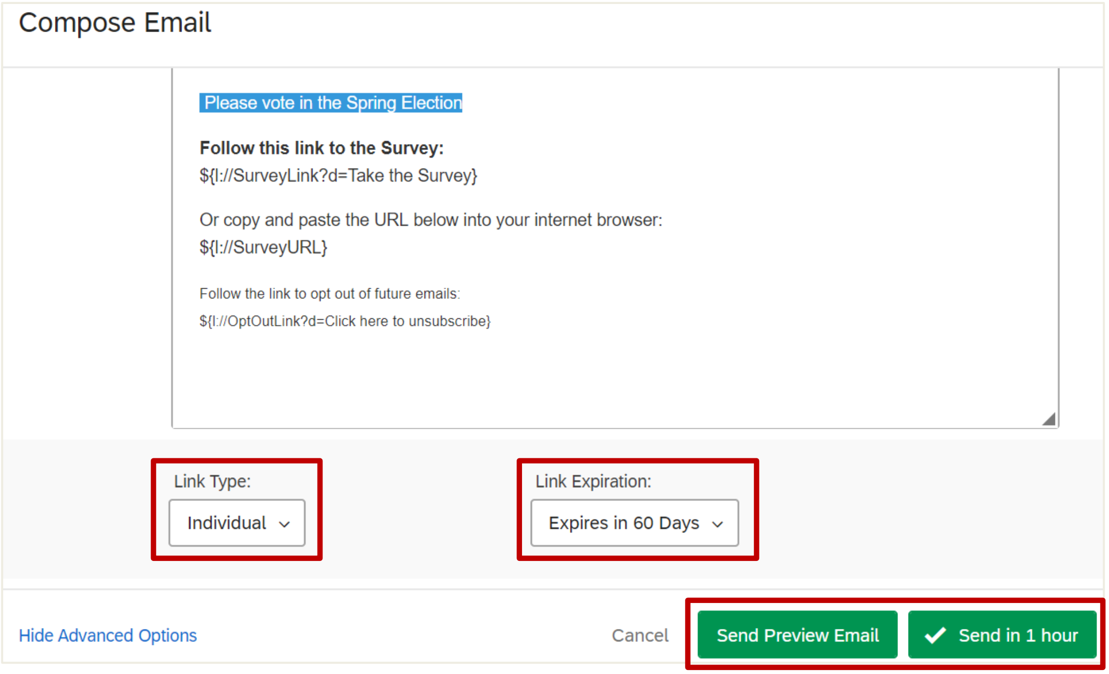
If you want to change a message and create another version, instead of overwriting the original, click the **Use Fixed Text** option from the **Load Message** dropdown after loading the message. You will then have the option to **Save** the message or **Save As** using a new name.

12. Click **Show Advanced Options**.



13. Choose a **Link Type:** Individual, Multiple Completes, or Anonymous. The default is Individual trackable link.

   - **Individual** links are trackable. For information about tracking email responses, see Email Distribution Management and Distribution Statuses.
   - **Multiple Completes** links allow respondents to use the link multiple times. Each response is added to the results.
   - **Anonymous** links will not track respondent information.



14. Choose a **Link Expiration**. The default is 60 days.

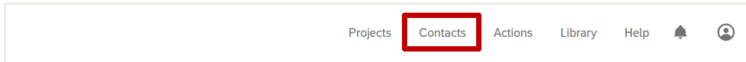
    NOTE: Link Expirations cannot be changed or undone.

15. Click **Send Preview Email** (or **Send**).

    ⊗ WARNING: The link in the preview email will be different than the actual survey link. So, do not send the preview email to your participants.

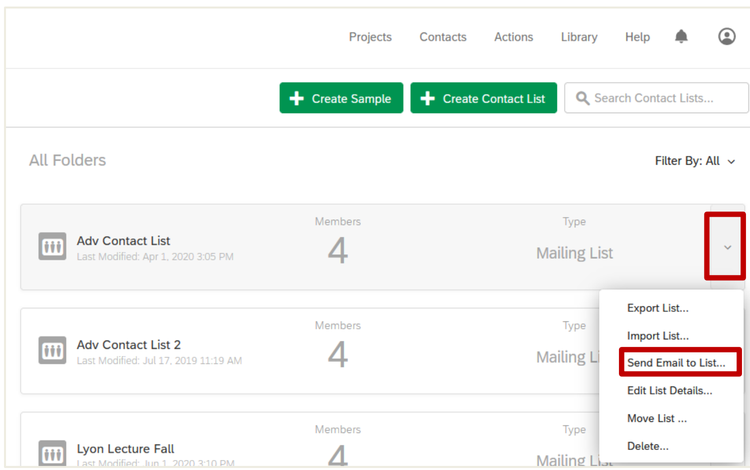
To Email a Contact List Without a Survey Invitation

1. Click on the **Contacts** page to go to the main Contact List screen.



NOTE: If you have recently opened a Contact List, that list will open by default. To go to the main Contact List screen, click on your name (next to the XM logo).

2. Find the list you want to use and click on the **List Options** dropdown or the List Options button.



3. Select **Send Email to List**.
4. Compose your message.

   NOTE: All fields are required. You must enter a From name, Reply-To email, Subject and Message.
5. Click **Send**.