Qualtrics Quick Reference Guide

'My Surveys' Tab
⇨ Create, view, edit, email surveys and access results.
⇨ Organize surveys into logical groupings using the 'Manage Folders' button.
⇨ Deactivate completed surveys by unchecking the green 'Active' check-box.

'Create Survey' Tab
⇨ Select 'Quick Survey Builder' to begin a new survey.
⇨ Enter an aptly named title for the survey and leave the folder option blank.

'Edit Survey' Tab
⇨ Modify survey questions using the tools on the far right of the screen.
⇨ Use 'Change Item Type' button to select question type.
    o Additional options will become available under the 'Change Item Type' button depending on the type of question selected.
⇨ Click the 'Create New Item' button to add questions as needed.
⇨ Customize with the 'Survey Options' button:
    o Survey Experience
        ▪ Enable respondents to change their responses.
        ▪ Allow respondents to save and continue later.
        ▪ Display a survey title.
    o Survey Protection
        ▪ Choose whether survey is invitation only.
        ▪ Enable password protection for surveys.
        ▪ Prevent people from taking the survey more than once.
        ▪ Prevent search engines from finding the survey.
        ▪ Set survey expiration date.
⇨ Click the 'Preview Survey' button to see how the survey will look to respondents.

'Distribute Survey' Tab
'Survey Link' Button
⇨ Click to send the survey to participants.
    o Click 'Activate your survey to collect responses.'
⇨ Copy the link provided and paste into a website or email.

'Email Survey' Button
⇨ Use of this feature requires a survey panel (see 'Panels' Tab below).
⇨ Click to select either an entire panel, or specific individuals from a panel, under the 'To:' section.
⇨ Complete the rest of the email form and click the 'Schedule Mailing' button.

'Panels' Tab
Panels in Qualtrics are spreadsheets containing names, e-mail addresses, and other attributes of interest (embedded data) that are uploaded into Qualtrics and used for more precise survey distribution.
⇨ Select 'Create New Panel' and provide a name for the panel.
⇨ Add panel members by typing participant information or uploading from a database (csv) file.

'View Results' Tab
⇨ View results through a Qualtrics report and export to: Word, PowerPoint, Excel, and PDF.
⇨ Ability to customize tables and graphs within reports.
⇨ Download raw survey data into: Excel, SPSS, XML, HTML.

'Help and Tutorials' Button
⇨ Qualtrics online training program: *Learn Qualtrics in 5 Steps*.
⇨ Online search feature for help with specific Qualtrics functions.