

Qualtrics User Guide

Updated April 28, 2025

Qualtrics is an online survey tool which allows users to build and distribute surveys and collect and analyze responses. It allows for the easy creation of simple or complex surveys with varying degrees of logic and question types. Qualtrics also allows for distribution of surveys though a variety of methods to fit every survey need. You can view and analyze results within Qualtrics or export your data for further analysis.

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Accessing Qualtrics:

- 1. Login to My.Stetson
- 2. Type Qualtrics into the search function
- 3. Select the Qualtrics icon



3.1. If prompted, accept the terms of service

4. Now you can create and manage surveys

Starting a New Project

1. Select the big blue "Create a new project" button in the lower left corner

AIVI = Home	6	4 🕛
Welcome to XM © Q Search by name, type, owner Recently visited See all projects	Welcome to XM Maintee your homespage by prioritizing what is most relevant to you. Try rearranging your homespage, pinning your favorite dashboard widgets, and starring important active projects. Learn more	×
Your recently accessed projects will appear here for easy access	Learn how to create a project from scratch Watch our free, on-demand training to learn survey building fundamentals by creating question and answer choices that engage respondents. Learn more	X fiew course
	Pinned widgets New Pin widgets to customize your homepage Pin widgets from any CX or Results Databased to see the information you care about most. Click the three dots in the corner of any compatible widget to pin to your homepage.	
Create a new project	Active surveys	

2. You can then browse Qualtrics' guided projects, sample projects, and templates or start a survey from scratch.

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Q. Search the catalog	Create a project							
0 filters applied ① <u>Clear filters</u>								
▶ Туре	From scratch							
✓ What you're measuring	Survey							
Customers								
Employees								
Markets	Guided projects							
Peeldente	Start building using a pre-built solution w	ith step-by-step guidance						
Chadrante	Training Feedback	Team Event Feedback	Event Feedback	Manager Feedback				
Students	Improve your onboarding and on-	Optimize team events by tracking	Measure how satisfied customers	Obtain feedback from your team				
See more	going employee training	their effectiveness and	are with events that you run	on the effectiveness of their				
→ Department		enjoyability		managers				
Customer experience								
Education	ţ	0 P	Ē	[A]				
Human resources								
Market research	Sample projects							
Marketing and advertising	Use example surveys and data to test ou	t how different parts of the XM platform w	ork together					
✓ Use case	Example guestions and re-							
Advertisement and creative testing	sults (with data)							
Brand tracking	Explore the different question types and how you can analyze							
Candidate experience	responses							
COVID-19								
Customer experience management	CD							

3. Once you select your template, sample project or from scratch survey, click on the blue "Get started" button in the bottom right.

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Q. Search the catalog	Create a project				Project
0 filters applied ③ <u>Clear filters</u>	From scratch				Survey
▶ Type					Begin a survey from scratch or get started with a previous file.
✓ What you're measuring	Survey				Best used for
Customers					Creating ad-hoc surveys
Employees	Guided projects				What's included
Residents	Start building using a pre-built solution w	ith step-by-step guidance			Blank survey
Students	Training Feedback	Team Event Feedback	Event Feedback	Manager Feedback	Related links
See more	Improve your onboarding and on- going employee training	Optimize team events by tracking their effectiveness and	Measure how satisfied customers are with events that you run	Obtain feedback from your team on the effectiveness of their	Learn how to create a survey
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Advertisement and creative testing	sults (with data) Explore the different question				
Brand tracking	types and how you can analyze responses				
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Survey Creation

- 1. After following the previous instructions to start a survey you will be prompted to name your project and select how you'd like to start your survey
 - 1.1. Create a blank survey project
 - 1.2. Import a QSF file
 - 1.3. Copy a survey from an existing project
 - 1.4. Use a survey from your library



Create a new project

Create a new project

Survey

	Name
Name	Untitled project
Untitled project	How do you want to start your survey?
How do you want to start your survey?	Create a blank survey project ^
Create a blank survey project ~	Create a blank survey project
	Import a QSF file
Create project	Copy a survey from an existing project
	Use a survey from your library

Survey

Cancel

1.5. Once you select "Create project" you will have the option to take a tour with the Qualtrics survey builder. This provides a quick overview of where things are





2. You can then build your survey in "blocks" (sections) and add in your questions by clicking the add a new question button and selecting a question type

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Survey Workflows	Distributions Da	ta & Analysis Results Reports			
Edit question	i	Tools V Saved at 8:49 AM Draft			Q Preview Publish
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A Matrix table	e ~				
🐨 👻 Matrix type		Default Question Block			
20 Likert	~	Q1			
Answer type	~	This is what a Multiple choice question looks Dialike Neither like nor dialike 	; tike		
Statements Number of statement - 3 +	nts	○ Line 2 02			÷¢:
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Use suggested state	ments	Clink in units Clatement 1	Click to write Scale Point 1	Click to write Scale Point 2	Click to write Scale Point 3
- Scale points		Click to write Statement 1	0	0	0
Number of scale po	ints	Click to write Statement 3	0	0	0
Edit multiple		•		_	Import from library Add new question
> Use suggested scale	e points		Add Blo	ck	

- 2.1. Qualtrics offers the following question types when building your survey:
 - Multiple choice—multiple choices, we recommend a 5-point Likert for easy analysis
 - Text entry—a free text question prompting users to type their responses
 - Text/Graphic—used to insert additional instructions or images to your survey
 - Matrix Table—displays multiple statements with the same choices for each statement
 - Slider—creates a customizable sliding scale to rate statements
 - Form field—free entry text for multiple choices or statements
 - Rank order—order statements by importance
 - Word of caution about the rank order question type: if respondents do not change the order because they agree with it, it counts it as a skipped question. Additionally, if respondents begin ordering but then decide to skip the question it takes whatever order they choose as the answer. We would recommend using the form field type question to rank statements instead of this question type.
 - Side by side—a matrix with additional column options
 - Net promoter score—a 10-point scale question typically used to rate how likely someone is to recommend
 - Timing—allows the creator of the survey to record and manage how long a participant spends on the page
 - Graphic slider—a slider with different built-in graphics
 - Constant sum—allows respondents to enter numeric data for each statement and sums them at the end of the statements
 - File upload—allows respondents to upload a file
 - Pick, group and rank—allows respondents to drag and drop items into groups and rank them
 - Drill down—used to help respondents choose from a long list of options
 - Signature—allows respondents to draw their signature in a text box



- Heat map—used to gather feedback on images by having the respondent click anywhere on that image
- Hot spot-similar to the heat map, but has predefined regions to select from
- Meta info-allows the creator to capture and record the recipient's browser information
- Captcha verification—adds reCAPTCHA validation
- Highlight—an interactive text sample where participants can select words to evaluate using a set criterion
- 3. If you wish to collaborate on the survey with colleagues, you can invite them as a collaborator. This will allow them to edit and distribute the survey, and view results
 - 3.1. To add collaborators, go to your home page in Qualtrics and select the three dots next to the survey you want to collaborate on and select collaborate

XM	Home				
	J				
	Welcome to XM				
	\$				
Q s	Q Search by name, type, owner				
Recent	ly visited See all projects				
📋 Surv	Activate				
	Collaborate				
	Rename project				

3.2. You can then search for your colleagues at Stetson, or type an external email

C	Collaborate on Project: test				×
A	dd the people you want to collaborate with	_			
	Ima	Add Selected	User and Gro	oup Address Book	
	Users	. Acti	Сору	Distr	
	Ima Sample (isample#stetson)	collaborators.			
				Cancel	ave
3.3.	If your collaborator is within Stetson university,	they will just ne	ed to log i	nto Qualtrics	
	though MyStetson and the survey will automatic	ally be added to	their proj	ects. If your	
	collaboration request and access the survey.	ii with instructio	ons on nov	to accept the	
	Jennifer Hughes from stetson has invited you to collaborate	e on their "test" surve	ey. Use		
	the appropriate login method below to access the survey from	n your existing Qualtr	ics		
	account.				
	Collaboration Code: hut 2010/00/0	DhvO			
	Conaboration Code: hyA311000F	RIIXU			

Login to view the survey:

- If you normally login through your organization <u>(SSO</u>), please copy the collaboration code above, and then log into your account using your organization's Qualtrics URL. If you are unsure whether your account uses SSO, see <u>this page</u>.
 After logging in, use the collaboration code to <u>accept the collaboration</u>
 - manually.
- If you normally login with a username and password on the default Qualtrics login page, you can use the button below to access your account. You may need to refresh your account to see the collaborated survey.
 - Alternatively, you can use the collaboration code to <u>accept the</u> <u>collaboration manually</u>.



If you are sure that you *do not* have a Qualtrics account, you can <u>create a new account</u> to access this collaborated survey.

- 4. Once you've built your survey with questions you can add question logic per question, or you can use the survey flow tab to add logic by block
 - Question behavior
 - 💪 Display logic
 - 🙃 Skip logic
 - └→> Carry forward statements
 - └→> Carry forward scale points
 - X Statement randomization
 - X Scale point randomization
 - X→ Recode values
 - O Default choices

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Survey	Workflow	Distributions	Data & Analysis	Results	Reports					
Ê	Survey fl	OW Draft								
8										
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٩	+ Add a	New Element Here								
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5. Once you have set up your survey you can preview it and test your logic by selecting the preview button in the corner of the survey tab



5.1. The preview will display what the survey will look like on both desktop and mobile, and allow you to select responses to test your survey logic

t Survey Place Bookmark	Tools 🗸 📮	∞o Share Prev
		12:29
	Click to write the question text	
	Click to write Choice I	Click to write the question text
	Click to write Choice 2	Click to write Choice I
	Click to write Choice 3	Click to write Choice 2
		Click to write Choice 3
	Click to write the question text This is the text you can highlight with the above color categories. To edit this text, click on the link below. Click between the words to combine or separate them. Clicking directly on words will allow or disallow respondents from highlighting them.	Click to write the question text This is the text you can highligh with the above color categories To edit this text, click on the link below. Click between the words to combine or securite hemo
	<	Clicking directly on words will allow or disallow respondents from highlighting them.

6. Once you have previewed your survey you are ready to publish. Using the responses tab under the survey options tab you can then set the survey availability timeline and publish the survey.

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Survey	Workflows Distributions D	Data & Analysis Results Reports		
Ê	Options	Saved at 9:01 AM Draft	Preview	Publish
	General Language, stile, survey description Responses Survey expiration, incomplete responses, back buttor and more Post-Survey Transi you emails, completed survey messages, and triggers Advanced Scoring Attach point values to specific answers	Automatic survey closure Collect incomplete survey responses and close survey access after any applicable survey expiry dates (Survey availability expiration, personalized link expiration, etc.) Image: Im		



6.1. Make sure you have selected to have incomplete survey responses deleted

Incomplete survey responses

Select what to do with incomplete responses and indicate when they should be considered incomplete. Learn more about incomplete responses

What should be done with incomplete survey responses?

0	Record
\bigcirc	Delete

- 7. Also under the survey options tab, you can set up post survey messages to be emailed to respondents after completion
- 8. Once you have published your survey, an anonymous link will be generated that you can use for distribution.

el	Publish and activate survey		×						
r	Publishing will activate your survey so that it can be seen by respondents.								
re on	Description Add a description for your version history User-published version	ExpertReview Survey strength: Fair Recommendations: 2							
. (Cancel	View recommendations Public	sh						
nt	Survey published and activated		×						
3	Your survey has been successfully published and activated. You can distribute it using the anonymous link below. You can also navigate to the Distributions section to view more options. https://stetson.qualtrics.com/jfe/form/SV_9MpZi0XIzV9GFca Copy link								
	Okay								

8.1. You can use the expert review on the publish popup for last minute suggestions and edits to make the survey more readable if desired



9. You can also find your survey link in the distributions tab

XM = Test Survey		
Survey Workflows	Distributions Data & Analysis Results Reports	
Pause response collecti	on	
Distribution summary	Get an anonymous survey link Paste this reusable link into emails or onto a website; it can't be tracked, and can't be used to identify	
C ⁹ Anonymous link	respondents	
🗹 Emails	https://stetson.qualtrics.com/jfe/form/SV_9MpZi0XIzV9GFca	
😚 Personal links	A Read-only	
Text message (SMS)	Copy survey link	
🗙 Social media		
G Offline app		
QR code		
Jownloads J		
মি Online panel		

If you experience any technical issues during your survey creation and publishing, you can email <u>iro@stetson.edu</u> for support

Viewing and Exporting Survey Results

Once you have published your survey and collected responses there are a few different ways to view and export your survey results.

1. Qualtrics has a quick view results tab that automatically visualizes the questions. You can access this by going to your survey and then clicking the "Results" tab.

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Survey Workflows Distributio	ns Data & Analysis Results Reports						
Page 1					⁰ Show filters (0)		
Pages Add ~					Responses: 1,033		
	blowe1@stetson.edu		* Back to top				
Q Search current page							
 Page 1 	jademileka@stetson.edu						
What is your first name? Preferred or given name is							
What is your last name?	Are you 18 years of age or older? 902 (1)						
What is your Stetson email address?							
Are you 18 years of age or older?	Yes						
Do you live on campus?							
Is this your first semester at Stetson?							
Are you enrolled in FSEM? This includes FSEM 100,	No						
Are you planning to graduate this academic year?Dec	o	200	400	600	800		

2. You can also create an "advanced-report" in the "Reports" tab of Qualtrics. You can build these reports from scratch, use the results tab as a base, or upload a QRF file as a base.

Survey W	Vorkflows	Distributions	Data & Analysis	Results	Reports	
						11
						There are no reports for this project
						There are no reports for this

- 2.2. For a more in-depth tutorial of creating an advanced-report, review the advanced-reports overview from Qualtrics <u>here</u>
- 3. You can also export the raw data from your survey
 - 3.1. To export the data go to the "Data & Analysis" tab and then click the "Export & Import" button, then select "Export Data.."

XM = test ~		③ Q 🚺
Survey Workflows Distributions Data & Analysis Results Report	rts	
Data Text iQ Stats iQ Crosstabs iQ Weighting		
Data Table	Last Record Collected: Never Inactive Res	sponse Quality (000) Recorded responses (0) ~
☐ ☐ Add Filter		(
		Export Data
		Import Data
		Response Export Automation
	The responses you are looking for do not exist.	Response Import Automation
	Collect responses.	Manage Previous Downloads
		View Automation History

3.2. This will prompt a popup window where you can select how you'd like your data



3.3. Once you've selected your file type, click the download button

Download a data table											
CSV	TSV	Excel	XML	SPSS	Google Drive	User-submitted files	Tableau				
Con	nma se	eparate	ed valu	les							
This is separ respo recom will no	This is a .csv file that can be imported into other programs. Each value in the response is separated by a comma and each response is separated by a newline character. If your responses contain special characters and you will open this export in Microsoft Excel we recommend using the TSV export. Qualtrics CSV exports use UTF-8 encoding, which Excel we will not open correctly by default.										
Learn	<u>more</u> wnload a	all fields									
Values	or labels										
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					More optio	ns Cancel	Download				

3.4. This will open a new window where you can manage your downloads, and your file will also be downloaded to your downloads file on your computer.

Manage Downloads						
	Status	Туре	Last Updated			
	* Download	csv (Table)	a few seconds ago			
				Close		

3.5. It will download as a compressed ZIP file, double click it in your file manager Downloads

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		🚞 test_Ma	arch+7,+2025_13.3	32	3/7/2025 1:32 PM	Compressed (zipp		1 KB

3.6. Then you should be able to open the file, manipulate your data as needed and save as a new file to a preferred location

Do	Downloads > test_March+7,+2025_13.32									
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