

Qualtrics Survey Software

GETTING STARTED WITH QUALTRICS

Contents

<i>Qualtrics Survey Software</i>	2
Welcome to Qualtrics!.....	2
Getting Started.....	2
Creating a New Survey.....	5
Homepage Views	6
Creating Survey Questions	7
Question Types	9
Individual Question Settings.....	13
Question Toolbar	15
Survey Look & Feel	17
Survey Options	19
Preview Your Survey	22
Creating & Deleting Contact Lists	23
Survey Distribution Methods.....	25
Accessing & Editing an Existing Survey	28
Closing a Survey	29
Survey Collaboration	30
Transferring a Survey	32
Creating Reports	33
Report Options	35
Deleting a Survey	36

Qualtrics Survey Software

Welcome to Qualtrics!

Qualtrics is a survey platform that allows Wright State members to create and distribute surveys to anyone from whom you are seeking feedback. Anyone from Wright State can use Qualtrics from any online location, any time it is needed.

Qualtrics is perfect for gathering feedback for a variety of situations:

- Events
- Trainings
- Orientations
- Test Products/Services
- Customer Feedback

The best way to get to know Qualtrics is by using and experimenting with Qualtrics! With all of the different options available, you will be able to create a customized survey that fits your needs by the end of this workshop!

Getting Started

Logging Into Qualtrics

1. Go to **wright.qualtrics.com**.
2. Enter your campus 'w' username and password.
3. The homepage of your personal Qualtrics account will open.

Homepage Properties

1. **qualtrics** header: Clicking this header will take you back to your homepage if you are working in a different part of the software.
2. **Projects**: Refreshes your All Projects list.
3. **Contacts**: Create and manage Contact lists through Qualtrics.
4. **Library**: Store surveys, graphics, files, and messages that have been previously created.
5. **Help**: Access the Qualtrics Help page for advanced support.
6. **Profile Icon**: Manage your profile, including account settings.
7. **Folders**: Clicking **Folders** will either maximize or minimize the left-hand toolbar, which shows the different folders you have created to organize your surveys.
8. **All Projects**: This tab shows every survey you have created or that has been shared with you.
9. **Shared with Me**: This tab only shows surveys that have been created by other users and shared with you.
10. **+ New Folder**: You can use this to create a new folder on your homepage to help categorize your surveys.
11. **Projects List**: All of your surveys (both active and non-active) are listed in this field.
12. **+ Create Project** Start a new survey using this link.
13. **Search Projects**: This toolbar lets you quickly search through your list of surveys by typing in the title or key words.

1

qualtrics.

2

Projects

3

Contacts

4

Library

5

Help

6

7

Folders

8

All Projects

9

Shared with Me

10

+ New Folder

11

All Projects

12

+ Create Project

13

Search Projects...

View:

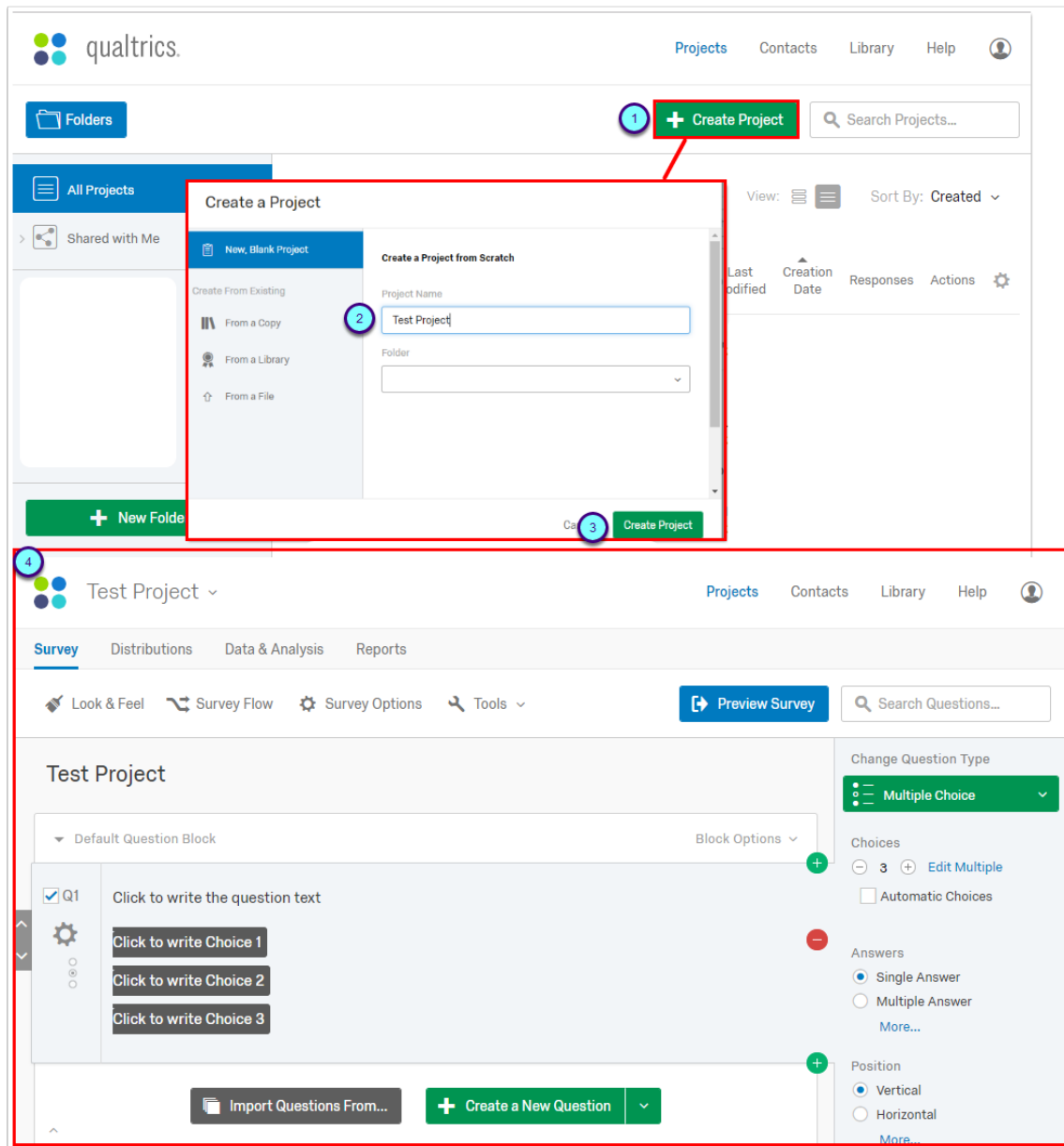
Sort By: Created

Project Name	Status	Last Modified	Creation Date	Responses	Actions
--------------	--------	---------------	---------------	-----------	---------

4

Creating a New Survey

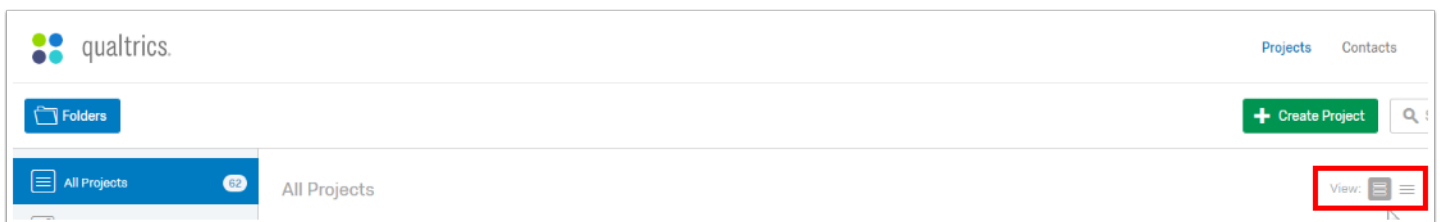
1. Click on **+ Create Project**.
2. Enter the **Project Name**.
 - If applicable, select the **Folder** you want to save this project in.
3. Click **Create Project**.



Homepage Views

There are two options available to you to view your homepage. To switch views, follow the steps below:

1. In the top right hand corner of your Qualtrics home page, select one of the two icons next to **View:**.
2. The view you last selected will automatically be your default view when you access Qualtrics. To switch views, click on the icon not currently selected (the selected icon will have a gray box around it, pictured below).



Creating Survey Questions

When starting a new survey, the first question will automatically appear by default as a multiple choice question.

Note: If you want to add introduction text to your survey, follow the steps below:

1. Click into the question box to edit it.
2. Click on the **Change Question Type** drop down in the toolbar on the right hand side.
3. Select **Descriptive Text**.

Creating a New Question

1. Under the previous question, select + **Create a New Question**.
2. A new question will appear; click on the **Change Question Type** drop down to choose from a selection of question options (see next step for a description of question types).
3. To edit the text of a question, click on either the question text or answer text and type in what you want that text to say.

Test Project

Default Question Block

Q1

Click to write the question text

Click to write Choice 1

Click to write Choice 2

Click to write Choice 3

Import Questions

Static Content

Standard Questions

Multiple Choice

Text Entry

Rank Order

Graphic

Matrix Table

Slider

Side by Side

Specialty Questions

Constant Sum

Hot Spot

Graphic Slider

Drill Down

Highlight

Pick, Group, and Rank

Heat Map

Gap Analysis

Net Promoter Score®

Signature

Change Question Type

Multiple Choice

Choices

3

Edit Multiple

Automatic Choices

Answers

Single Answer

Multiple Answer

More...

Position

Vertical

Horizontal

More...

Validation Options

Force Response

Test Project

Default Question Block

Q1

Click to write the question text

Import Questions From...

Create a New Question

Change Question Type

A Text / Graphic

Choices

0

Edit Multiple

Automatic Choices

Type

Text

Graphic

File

Validation Type

None

8

Question Types

Qualtrics gives you an entire menu of question options for you to choose from, ranging from Multiple Choice to Heat Maps. Below you can read a short description of each question type to help you determine which one can provide you with the most comprehensive data.

Static Content

These questions do not require any action from respondents. Information in these questions is merely displayed to those taking the survey.

- **Descriptive Text:** Descriptive Text questions can be used to add an introduction or display content to respondents without soliciting feedback.
- **Graphic:** Graphic questions are used to display images to respondents without soliciting feedback.

Standard Questions

These question types are some of the most commonly used. They are a simple and effective means of gathering information.

- **Multiple Choice:** Multiple Choice questions are displayed as a traditional list of choices or as a dropdown menu, select box, etc. These are the most commonly used forms of questions when performing research.
- **Text Entry:** Text Entry is used to gather open-ended feedback from respondents. You can choose to set Text Entry questions to allow for single line, multi-line, or essay length answers. You can also customize these questions by setting a specific character limit (i.e. you choose Essay, but want to set a 500 character limit). You can also use this question type to create a fillable form within your survey to collect respondent's information (Name, Email, Phone, etc).
- **Rank Order:** Rank Order is used to determine respondents' order of preference for a list of items you give them.
- **Matrix Table:** Matrix Tables are used to collect multiple pieces of information in one question. This is an ideal way to condense your survey and group similar items into a single question.

- **Slider:** Sliders let respondents indicate their level of preference with a draggable bar rather than a traditional button or checkbox.
- **Side by Side:** Side by Side questions let you ask multiple questions using one table, condensing your survey while still allowing you to collect the same amount of data.

Specialty Questions

These questions are used in situations that are more specific and gather more targeted data.

























- **Constant Sum:** Constant Sum collects numeric data and displays a sum to the respondent. This is often used for allocation assessments, such as defining how you spend your time in different activities.
- **Hot Spot:** Hot Spot allows respondents to interact with regions of an image. This is often used for usability and concept testing.
- **Graphic Slider:** Graphic Slider questions allow respondents to use graphics (i.e. smiley faces) to indicate their level of preference.
- **Drill Down:** Drill Down helps respondents choose from a long list by starting with a broad category and then honing in on the choices that are relevant to the respondent.
- **Pick Group and Rank:** Pick Group and Rank is used for sorting activities. Respondents place items into groups and have the option to rank the items within the group.
- **Heat Map:** Heat Map lets respondents click a specific point on an image. You can then compare all of the survey responses to determine which area was clicked on the most often. This is often used when deploying a new or updated website, layout, etc.
- **Gap Analysis:** Gap Analysis is a variation of the Side by Side question, and measures satisfaction and detects why any 'gaps' in satisfaction may exist.
- **Net Promoter Score:** NPS tracks customer loyalty with a simple, standardized question; 'On a scale of 0-10, how likely...'.
- **Highlight:** The Highlight question type allows you to present survey participants with an interactive text sample. Participants can select words from the text and evaluate using criteria you choose (i.e. whether they like or dislike the selected text)

- **Signature:** The Signature question type presents survey participants with an entry box where they can draw their signature using a mouse (for a standard desktop) or their finger (for a touch-screen device).

Advanced

These questions are not included in the standard Qualtrics license; therefore, only two options will be available to you. The grayed out options are not included in Wright State's license agreement with Qualtrics. The two available to you are:

- **Timing:** This is a hidden question is used to both time, and limit, how long participants spend on a page of the survey.
- **Meta Info:** Meta Info reports the public information about the respondent's computer, such as their browser and operating system. It requires no respondent action and is completely hidden.

		Change Question Type	
		<div> <div>• —</div> <div>• —</div> <div>• —</div> <div>Multiple Choice</div> <div>▼</div> </div>	
Static Content	 Descriptive Text	 Graphic	
Standard Questions	 Multiple Choice	 Matrix Table	
	 Text Entry	 Slider	
	 Rank Order	 Side by Side	
Specialty Questions	 Constant Sum	 Pick, Group, and Rank	
	 Hot Spot	 Heat Map	
	 Graphic Slider	 Gap Analysis	
	 Drill Down	 Net Promoter Score®	
	 Highlight	 Signature	
Advanced	 Timing	 Meta Info Question	
	 File Upload	 Screen Capture	
	 Captcha Verification		
Replace From Library	 Question Library		

Individual Question Settings

Besides the ability to choose your question type from the above list, you can set specific rules for each question in your survey. There are many different settings available, as well as several ways to perform most of these actions.

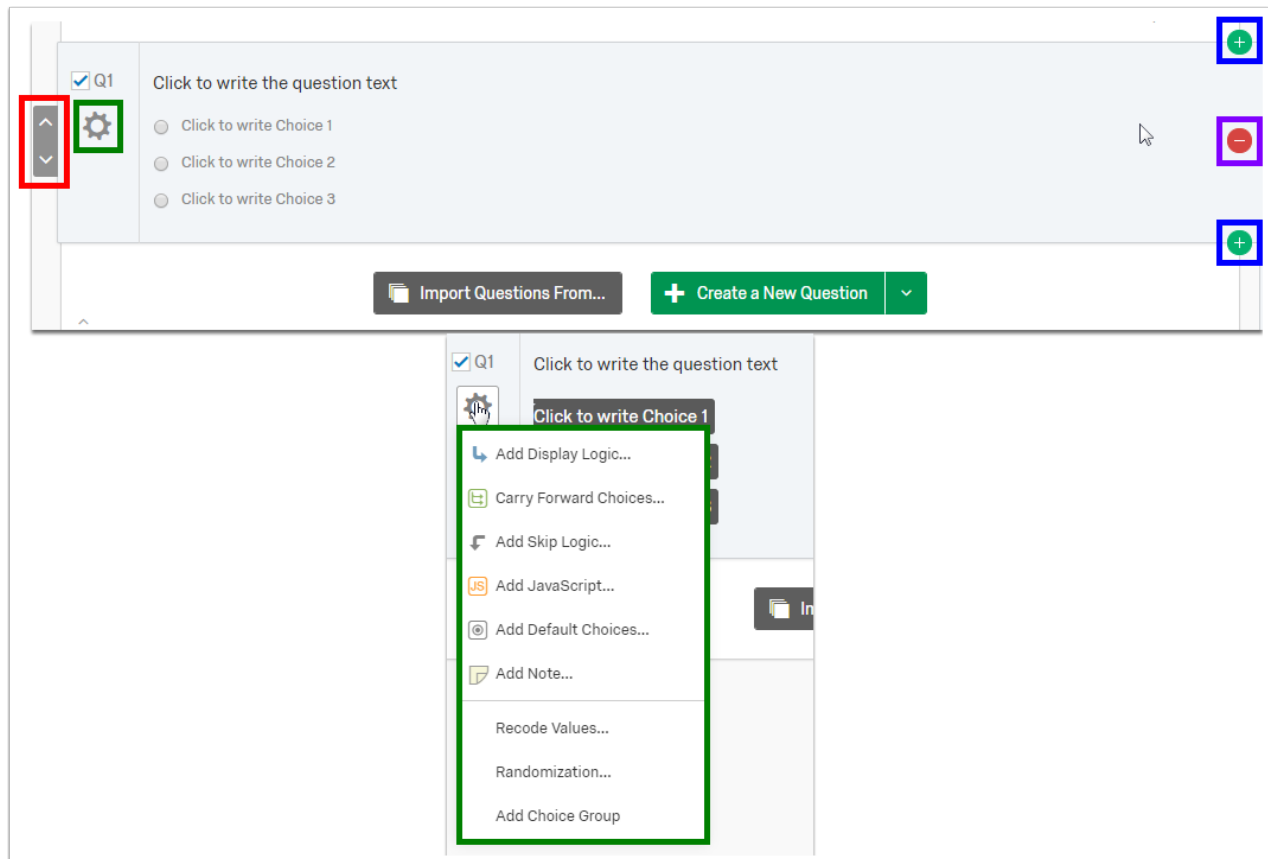
When hovering over a question with your cursor, different options appear on both the left and right hand side of that question:

- The arrows on the left hand side allow you to either move that question up (before) or down (after) the other questions in your survey (highlighted in red).
- On the right hand side, either the green plus signs (highlighted in blue) allow you to add a question above or below the question you are currently working with. The red arrow (highlighted in purple) deletes the current question.

Clicking on the gear icon (highlighted in green) will bring up a drop down list with advanced options that you can set to be specific to that question. If you want to use any of these options, click on it to add it to your question.

- **Add Display Logic:** Create logic that determines the conditions for which your question will be displayed.
- **Carry Forward Choices:** Pull in the answer choices, statements, or scale points from a previous question in your survey, for use in your current question.
- **Add Skip Logic:** Skip respondents ahead to another point in the survey depending on how they answer the question.
- **Add JavaScript:** Customize your question with JavaScript, a programming language that helps you add interactive features and enhanced functionality to your survey.
- **Add Default Choices:** Choose a default answer that will be preselected when the respondent starts the survey.
- **Add Note:** Add a comment to the question for your own benefit or for anyone you are sharing the survey with. These notes will NOT be displayed to respondents.
- **Recode Values:** Use this option to change the default coding or variable names for your choices. The coding you set here will be reflected in your reports and raw data and is used to calculate all statistics.

- Randomization: Set your choices to display in a random order.
- Add Choice Group: Group answer choices for the respondent (available for Multiple Choice and Matrix Table questions only).



Question Toolbar

When you select any question, a toolbar will appear on the right hand side of your screen. This allows you to choose from additional options and apply them to that question.

Depending on your question type (Multiple Choice, Text Entry, etc) you will see different options on the top half of the toolbar. In the screenshot below, I have selected a Multiple Choice question. This toolbar allows me to set how many choices I want to give my respondents, set if I only want to let them answer once or multiple times, and if I want the position of my choices to be vertical (stacked on top of each other) or horizontal (lined up next to each other). The rest of the options will appear for any question type.

Validation Options: You can choose to set an answer to **Force Response**, which will require respondents to answer that question before moving on or submitting their survey. Additionally you can set this to **Request Response**, which will ask them to answer the question before moving on or completing the survey, but does not require them to.

Validation Type: To require respondents to answer a question a certain way (i.e. with a specific code they have been given before taking the survey), you can set up Custom Validation. **Custom Validation** allows you to build your own validation criteria.

Actions:

- **Add Page Break:** Insert a Page Break below the selected question.
- **Add Display Logic:** Show or hide the selected question based on specified conditions (also available by clicking the **Gear** icon).
- **Add Skip Logic:** Skip the respondent to a later point in the survey if they answer the selected question a certain way (also available by clicking the **Gear** icon).
- **Copy Question:** Create a duplicate below the selected question
- **Move Question:** Relocate the selected question to a designated spot in the survey. When clicked, the selected question will turn blue, allowing you to drag and drop it wherever you would like to move it. This is best for moving questions across multiple questions or blocks.
- **Add Note:** Make internal notes or comments on the selected question. Your respondents will NOT be able to see these Notes (also available by clicking the **Gear** icon).

- Preview Question: See how the selected question will look to your respondents without previewing the entire survey.

Change Question Type

Multiple Choice

▼

Choices

−

3

+

Edit Multiple

☐ Automatic Choices

Answers

☒ Single Answer

☐ Multiple Answer

More...

Position

☒ Vertical

☐ Horizontal

More...

Validation Options


☐ Force Response ▼


Validation Type


☒ None


☐ Custom Validation


Actions


 Add Page Break


 Add Display Logic

 Add Skip Logic

 Copy Question

 Move Question

 Add Note

 Preview Question

Survey Look & Feel

Once you have added all of the questions to your survey, you can now choose how you want your survey to look. These options include changing the text of the Next and Back buttons, adding a progress bar, selecting a page transition animation, changing the number of questions displayed per page, highlighting questions, and adding a visual separator between questions.

1. Click on **Look & Feel** in the toolbar at the top of your survey
2. The first option allows you to change the theme of your survey. There are several themes that are Wright State specific for you to choose from. To view the available themes, click on **Change Theme**.
3. The menu to the right of the theme box allows you to set up how the rest of your survey looks:
 - **General:** Change Next and Back button texts, add a progress bar, set a specific number of questions displayed per page, etc.
 - **Fonts:** Change the font of your questions and answer choices.
 - **Colors:** Customize the color of different text segments, add a color for alternate rows of a Matrix table, specify the highlighter color, and more.
 - **Advanced:** Add a header or footer to each page of your survey.
4. Once you've set up your survey to look the way you want, click **Save** at the bottom right corner of the menu.

Test Project

Wright State University

WSU- paw prints

Change Theme

General

Fonts

Colors

Advanced

Next Button Text:

>>

Back Button Text:

<<

Progress Bar:

No Progress Bar

Page Transition:

None

Questions per Page:

☐ Highlight Questions

☒ Question Separator

WSU- paw prints

WSU- white background

WSU- bi-plane

WSU- green background (updated)

WSU- school colors

Click to write the question text

Click to write Choice 1

Click to write Choice 2

Click to write Choice 3

>>

Survey Powered By [Qualtrics](#)

Cancel

Save

18

Survey Options

The Survey Options menu is where you can change many general survey settings, such as the survey expiration date or the message that will appear to respondents when they finish the survey.

1. To access these settings, click **Survey Options** in the toolbar at the top of your survey.

Experience

Enhance your respondents' survey experience.

- **Back Button:** Allows respondents to change their responses.
- **Save and Continue:** Respondents can save their responses and continue the survey at a later time.
- **Show Question Numbers:** Shows the question number to the respondent

Survey Protection

Set privacy levels for your survey to ensure you are only receiving feedback from the proper respondents.

- **Open Access:** Allows anyone to take the survey (default setting).
- **By Invitation Only:** Prevents people from taking the survey through an anonymous link.
- **Password Protection:** Set a single password respondents must know to access the survey.
- **Prevent Ballot Box Stuffing:** Keep people from taking this survey more than once.
- **Survey Expiration:** Set a date range the survey will be available.

Survey Termination

- **Default end of survey message:** Keep the generalized message from Qualtrics that the respondent has completed the survey.
- **Custom end of survey message:** Create your own message respondents will see when they have completed the survey.

- Send additional thank you email: Compose an email that will be sent automatically to everyone who has completed the survey.
- Anonymize Response: Completely remove any identifying information of the responses for your survey (i.e. IP address, location data, etc).

Inactive Surveys

If a survey has been closed, respondents will get a notification that the survey is no longer available.

- Default inactive survey message: Respondent sees the auto-generated message set by Qualtrics.
- Custom inactive survey message: Respondent sees a message you compose when trying to access the survey.

Partial Completion

Once a participant starts a survey, they have a certain amount of time to complete the survey, regardless of the survey's activation status or expiration dates. You can determine how much time a respondent has through this setting.

2. Once you have customized your Survey Options to fit your needs, hit **Save** at the bottom right corner of the menu.

Survey Options

Survey Experience



- ☐ **Back Button.** Enable respondents to change their responses.
- ☒ **Save and Continue.** Allow respondents to save and continue later.
- ☐ **Show Question Numbers.** Great for previews. For participants, try a [Progress Bar](#) instead.
- ☐ **Use Custom Survey Validation Messages...**

Survey Language: English (US) ▼ The language the survey is written in.

Survey Title: Online Survey Software | Qualtrics This text will appear in the browser as the window or tab title.

Meta Description: Qualtrics sophisticated online su Search engines and social media services use this description.

Survey Protection



- ☒ **Open Access.** Allow anyone to take this survey.
- ☐ **By Invitation Only.** Prevent people from taking the survey using an anonymous survey link.
- ☐ **Password Protection.** This password must be entered to take this survey:
- ☐ **Prevent Ballot Box Stuffing.** Keep people from taking this survey more than once.
- ☐ **HTTP Referrer Verification.** The user must come from this URL to take the survey:
- ☒ **Prevent Indexing.** A tag will be added to the survey to prevent search engines from indexing it.
- ☒ **Secure Participants' Files.** Files uploaded as responses can only be viewed by users with permission to view responses.
- ☐ **Survey Expiration.** The survey will only be available for a specified date range.

Survey Termination



- ☒ **Default** end of survey message.
- ☐ **Custom** end of survey message...
- ☐ Redirect to single response report.
- ☐ **Redirect** to a full URL, ex. "http://www.qualtrics.com":
- ☐ Send additional thank you **email** from a library... When distributed via the Survey Mailer.
- ☐ **Anonymize Response.** Do NOT record any personal information and remove contact association (not recommended).

Inactive Surveys



- ☒ **Default** inactive survey message.
- ☐ **Custom** inactive survey message...

Partial Completion

Record ▼ responses in progress 1 Week ▼ after respondent's last activity ▼

Please note, the recipient cannot continue taking the survey once their data is recorded or deleted.

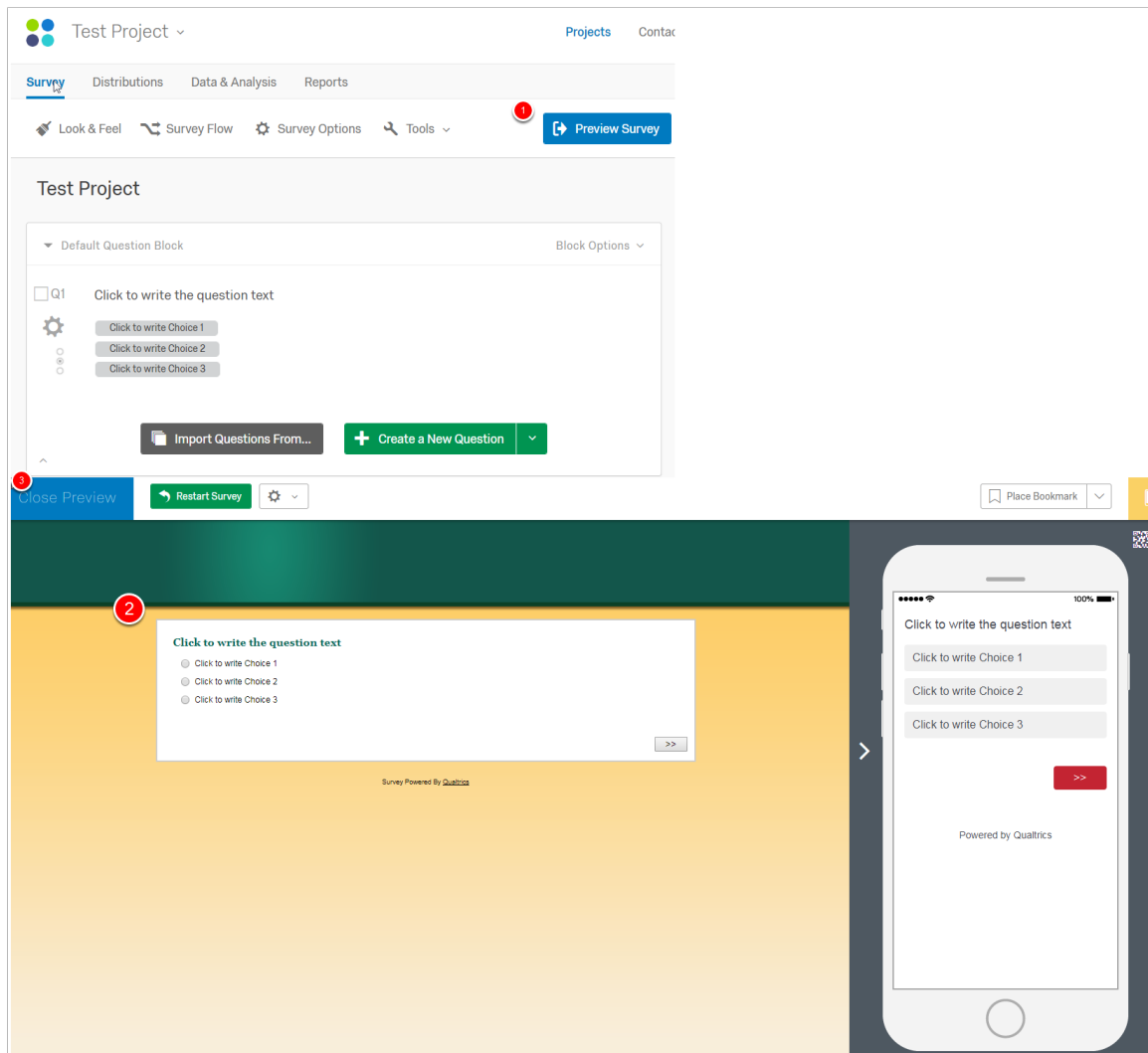
2
Close

✓ Save

Preview Your Survey

Once you determine that your survey is complete, you can preview how it will look to your respondents to ensure your settings are working correctly.

1. Click on the blue **Preview Survey** button at the top right hand corner of your screen.
2. Your survey will be displayed to you as respondents will see it; you can click through the survey and test any display logic, forced responses, theme or text changes, etc. It will also give you a mobile view to show how respondents using a mobile device will see the survey.
3. To exit preview mode, click on **Close Preview**.



Creating & Deleting Contact Lists

A contact list is a mailing list that has been entered or uploaded into Qualtrics. Contact lists can be used to easily distribute surveys to all listed individuals, to apply authentication requirements to surveys, and to store information about particular contacts.

Creating a Contact List

1. Click on **Contacts** in the top right hand corner of your browser.
2. Select **+Create Contact List**.
3. Enter a name for your Contact List. Select **Next**.
4. You can create your Contact List by importing a file, adding contact information manually, or importing from another survey. Once you have added contact information, select **Add Contacts**.
5. Your Contact List is now saved and can be used at any time and for multiple surveys.

Deleting a Contact List

1. Click on **Contacts** in the top right hand corner of your browser.
2. Click on the dropdown arrow to the right of the list you want to remove. Select **Delete**.

Projects

Contacts

Library

Help

Projects

Contacts

Library

Help

+ Create Sample List

+ Create Contact List

Search Contact Lists...

Create Contact List

Name

Sample List

Folder

Cancel

Next >

Add Contacts

Import From a File

Add Manually

Import From a Survey

Browse...

Reload

Show Options

File Requirements

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

Updating Existing Contacts

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

Example Document

Skip this step

4

Load Contacts

Survey Distribution Methods

After you have completed and tested your survey, you are ready to choose your distribution method! This is the last step you will take before your respondents can begin taking your survey. Qualtrics provides a variety of channels for you to distribute your survey; the most commonly used methods are sending out Anonymous Links, Emails, or posting to Social Media platforms.

Note: Once you choose a method of distribution, your survey will automatically turn active.

Using an Anonymous Link

1. Click on the **Distributions** tab under the title of your survey.
2. Click **Get a single reusable link**.
3. Copy and paste the anonymous survey link; you can distribute this link through email, post it on a website, etc.

Sending the Survey Through a Qualtrics Email

1. Click on the **Distributions** tab under the title of your survey.
2. Select **Compose Email**.
3. Select a contact list to send your survey to (see above for instructions).
4. Specify who you want the sender to be in the **From Name** box. Enter a **Reply-To Email** address.
5. Select when you want your email to be sent from the drop down menu.
6. Add a **Subject** and compose the message of your email. When you are happy with the message, click the **Send** button in the bottom right corner.
 - Note: You can also send a preview email to a 'test' contact list you create if you want to view the way the message is received.

Posting a Survey to Social Media

Qualtrics supports posting surveys to the following platforms:

- Twitter
 - Facebook
 - Reddit
 - LinkedIn
 - Google+
 - Pinterest
1. Click on the **Distributions** tab under the title of your survey.
 2. Select **Social**.
 3. Choose your preferred social media platform.
 4. Login to your social media account and follow the subsequent prompts to post your survey link.

Test Project

Survey

Distributions

Data & Analysis

Reports

Look & Feel

Survey Flow

Survey Options

Tools

Test Project

Default Question Block

Q1

Click to write the question text

Click to write Choice 1

Click to write Choice 2

Click to write Choice 3

Import Questions From...

Create a New Question

Test Project

Survey

Distributions

Data & Analysis

Reports

How do you want to distribute your survey?

Email

Web

Social

Mobile

Send with Qualtrics

Use your own email system

Compose Email







Get a single reusable link

Generate a trackable link for each contact

Accessing & Editing an Existing Survey

Qualtrics automatically saves surveys that you create as you are working on them; therefore, you will notice there is no 'Save' button you need to press in order to exit the platform and return to a survey you're currently working on. To access or edit an existing survey, follow these steps:

1. Log back in to wright.qualtrics.com with your campus username and password.
2. Find the survey you wish to edit or view; click on the title of that survey.
3. This will open the survey in a window where you can make changes, update, or finalize your survey.
 - **Note:** Making changes to an active survey could invalidate responses and skew your final report. Qualtrics will prompt you when trying to edit active surveys to confirm you want to make any changes.

	Project Name	Status	Last Modified	Creation Date	Responses	Actions	
 	Test Project	 Active	Jul 28, 2017 10:27 AM	Jun 15, 2017 3:13 PM	0		

Closing a Survey

When you are finished collecting data from your respondents, you can close your survey so it is no longer accessible. This will allow you to run reports regarding the information you have collected and begin to analyze your data.

1. Click on the dropdown arrow under the **Actions** column of the survey you wish to close.
2. Select **Close**. Qualtrics will prompt you to confirm you want to stop new survey sessions from being started. You have the option to close all active survey sessions and record them as partial data, or allow active sessions to be finished.
3. Click **Pause Response Collection** to close your survey.

The screenshot displays the Qualtrics interface with a table of survey projects. The table has columns for Project Name, Status, Last Modified, Creation Date, Responses, and Actions. A project named 'Test Project' is shown with a status of 'Active'. The Actions column for this project has a dropdown arrow highlighted with a red circle and the number 1. The dropdown menu is open, showing various options, with the 'Close' button highlighted by a red circle and the number 2. Below the table, a confirmation dialog titled 'Pause Response Collection: Test Project' is shown. It contains the text 'New survey sessions can not be started.' and two radio button options: 'Close all active survey sessions and record them as partial data.' (selected) and 'Allow all active survey sessions to be finished.' At the bottom of the dialog, there are two buttons: 'Cancel' and 'Pause Response Collection', with the latter highlighted by a red circle and the number 3.

Project Name	Status	Last Modified	Creation Date	Responses	Actions
Test Project	Active	Jul 28, 2017 10:27 AM	Jun 15, 2017 3:13 PM	0	<div>⌵ Close Share Project Rename Project Copy Project Edit Survey Preview Survey Translate Survey Distribute Survey Data & Analysis View Reports Delete Project</div>

Showing page 1 of 1

Pause Response Collection: Test Project

New survey sessions can not be started.

☒ Close all active survey sessions and record them as partial data.

☐ Allow all active survey sessions to be finished.

Cancel **Pause Response Collection**

Survey Collaboration

Qualtrics allows you to collaborate with other members at Wright State. If you are the original creator of the survey, you can select between different permission levels for individuals you are sharing your survey with.

1. Click on the dropdown arrow under the **Actions** column of the survey you wish to share.
2. Select **Share Project**.
3. Type the username or email of the person you want to share your survey with.
 - **Note:** The person you are sharing a survey with will need to login to Qualtrics at least once before you can add them to a survey.
4. Once you've added someone to your survey, select the level(s) of access you want to give them:
 - **Edit:** Gives the person access to add questions or make changes to your survey.
 - **View Reports:** Gives the person access to run reports and view collected information.
 - **Activate/Deactivate:** Gives the person access to change the Status of your survey from Active to Inactive and vice versa.
 - **Copy:** Allows the person to copy your survey questions and use them to create a survey they have ownership of.
 - **Distribute:** Gives the person access to send your survey around to respondents in order to collect data.
5. Click **Save**. Everyone you share a survey with will receive an email with a link to your survey.
6. To remove a person's access, repeat steps 1 and 2, then click on the red icon to the right of their name. Click **Save**.

Project Name	Status	Last Modified	Creation Date	Responses	Actions
Test Project	Active	Jul 28, 2017 10:27 AM	Jun 15, 2017 3:13 PM	0	<div><div>1</div><div>2</div><div>Close</div><div>Share Project</div><div>Rename Project</div><div>Copy Project</div><div>Edit Survey</div><div>Preview Survey</div><div>Translate Survey</div><div>Distribute Survey</div><div>Data & Analysis</div><div>View Reports</div><div>Delete Project</div></div>

Showing page 1 of 1

Share Project: Test Project

3

Add

User and Group Address Book

User	4	Edit	View Reports	Activate/Deactivate	Copy	Distribute
<div><div></div></div>	<div>Details</div>	<div>Details</div>	<div></div>	<div></div>	<div></div>	<div>6</div> <div></div>

5

Cancel

Save

Transferring a Survey

The creator of a survey has full accessing and editing rights to that survey. If the creator leaves the University and their account becomes inactive, all surveys they have created will be deleted, including surveys they have shared with others.

To prevent data loss, if you or a coworker is leaving the University you will need to have any surveys you still want access to transferred. Survey transfers can only be performed by Qualtrics administrators, and will need to be done before an account becomes inactive. To request a survey transfer, follow the steps below:

1. Contact Denise Anderson in the Office of Institutional Research & Effectiveness at (937) 775-2010 or denise.anderson@wright.edu.
2. Provide the username of the survey owner, the name of the survey you wish to transfer, and the username of whom the survey should be transferred. .

You will receive a confirmation once the survey has been successfully transferred to a new owner.

Creating Reports

In the Reports module, you can view answer summaries and create custom pages to visualize and manage aggregate results. There are three elements in the Results module:

- **Visualization:** An interface to view your data as a graph or a table.
- **Page:** A scratchpad where you can explore and analyze your data and create insightful visualizations.
- **Report:** A collection of filters, pages, and visualizations.

You can create as many visualizations, pages, and reports as you want to explore and analyze your data.

Creating a Report

1. Click on the dropdown arrow to the right of your survey in the **Actions** column.
2. Select **View Reports**. This will automatically create a Default Report for you to easily view your data.

Creating Additional Reports

1. Select **View Reports** from the dropdown arrow to the right of your survey in the Actions column.
2. Click the current report name dropdown.
3. Select **Create New Report**.
4. Enter a name for your report.
5. Click **Create**.

Project Name	Status	Last Modified	Creation Date	Responses	Actions
Test Project	Active	Jul 28, 2017 10:27 AM	Jun 15, 2017 3:13 PM	0	<div><div></div><div><div>Close</div><div>Share Project</div><div>Rename Project</div><div>Copy Project</div><div>Edit Survey</div><div>Preview Survey</div><div>Translate Survey</div><div>Distribute Survey</div><div>Data & Analysis</div><div>View Reports</div><div>Delete Project</div></div></div>

Showing page 1 of 1

Test Project

Survey

Distributions

Data & Analysis

Reports

Results

Printed Reports

Report: Default Report Add Filter

Add Report Breakout

Search Questions

Create Custom Page

Q1 - Click to write the question text

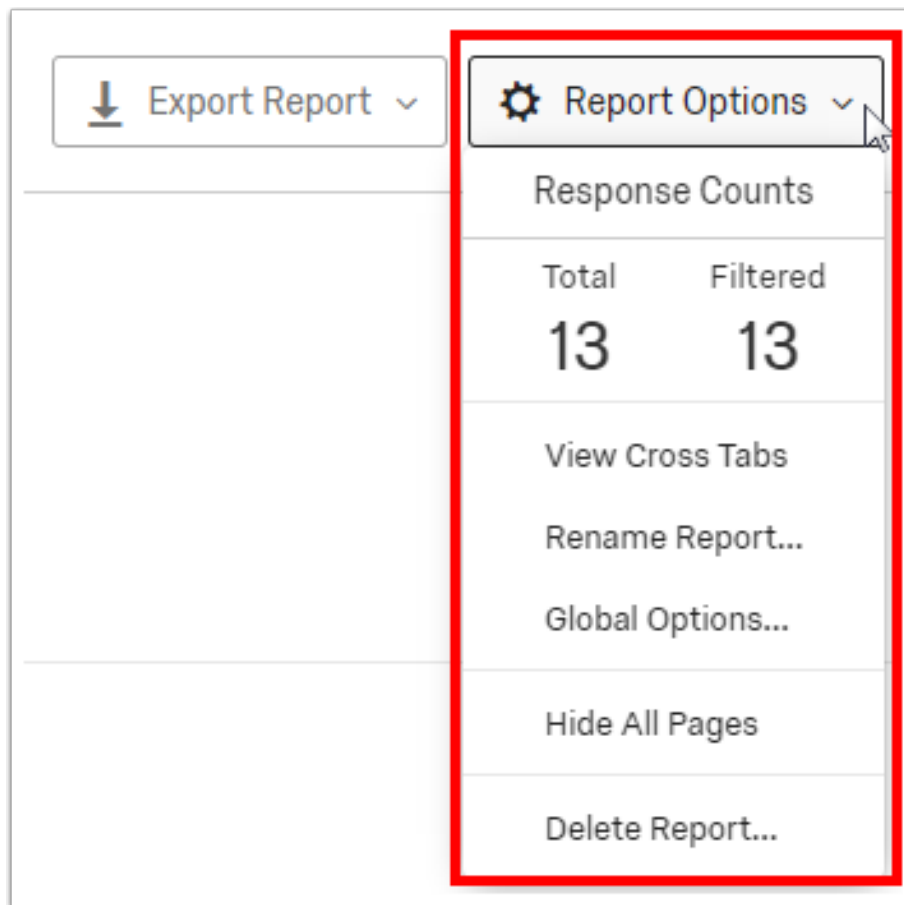
Q1 - Click to writ

Click to write Choice 1

Report Options

There are several different settings available to you when viewing a report. These options are available using the Report Options dropdown menu in the top right hand corner of your reports window.

- **View Cross Tabs:** Create and view cross tabulation charts for questions in your surveys.
- **Rename Report:** Edit your report name.
- **Delete Report:** Delete your entire report (including all filters, custom pages, and question pages).



Deleting a Survey

If you are a frequent user of Qualtrics, surveys can pile up quickly in your library. If you are completely finished with a survey and do not need to reference it any longer, you can delete surveys from Qualtrics (Note: this is different than closing a survey; closed surveys still appear in your library and can be accessed when logged in to Qualtrics).

1. Click on the dropdown arrow to the right of your survey in the **Actions** column.
2. Select **Delete Project**. Qualtrics will prompt you to make sure you want to delete your survey and all of its responses.
 - **Note:** Deleting a survey will also delete it for anyone you shared that survey with. If someone still needs access to that survey, make sure to work with them so they can access what they need.

Project Name	Status	Last Modified	Creation Date	Responses	Actions
Test Project	● Active	Jul 28, 2017 10:27 AM	Jun 15, 2017 3:13 PM	0	<div><div>1</div><div>⌵</div><div><div>2</div><div>Close</div><div>Share Project</div><div>Rename Project</div><div>Copy Project</div><div>Edit Survey</div><div>Preview Survey</div><div>Translate Survey</div><div>Distribute Survey</div><div>Data & Analysis</div><div>View Reports</div><div>Delete Project</div></div></div>

Showing page 1 of 1