

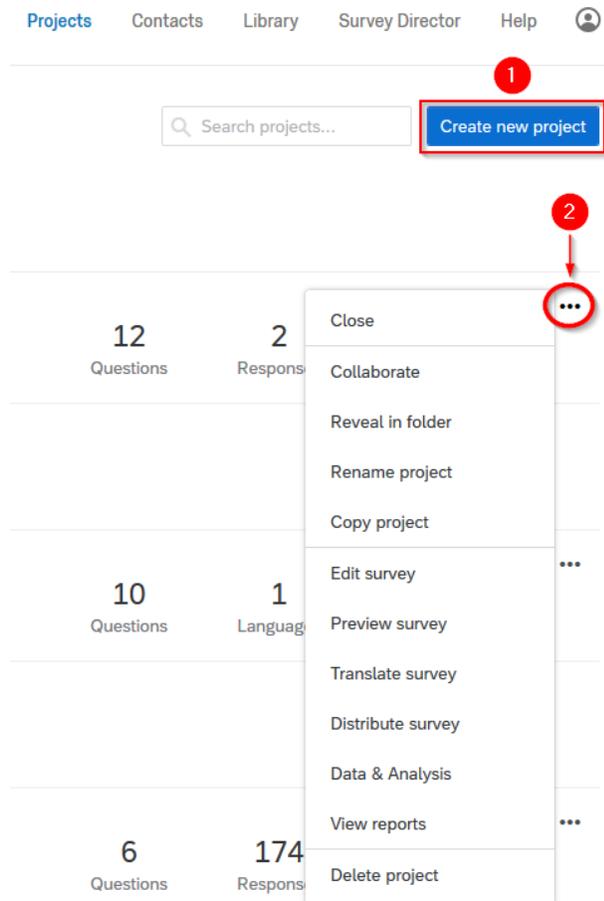


The Essentials (Nov 2019)

How to log in:

- Online Services box in Inside SOU
- <https://sou.qualtrics.com>

Projects Overview



This is the first screen you will see after logging in where you view and manage all of your surveys.

1. Create a new project using the **Create new project** button.
2. Access an existing survey's options by clicking on the **horizontal dots** on the far right of its entry in the Projects page. Use the **dropdown menu** to select how you want to interact with your survey. (You can edit a survey just by clicking on its name, but this menu includes all of the survey's options.)

Project View

XM 2019 Leasing Plan Selection ▾

[Survey](#) [Actions](#) [Distributions](#) [Data & Analysis](#) [Reports](#)

Selecting a project will take you into the Project View, which includes links to every other page in the survey creation and deployment process at the top of the screen. You can jump between these pages at any time. They are:

1. **Survey** - Takes you to the Survey View where you build your survey. (You start here by default when you enter Project View.)
2. **Actions** - You can configure automatic responses to completed surveys here, but this is an advanced feature.
3. **Distributions** - Takes you to the Distributions View where you choose how to distribute your survey and control how you collect responses.
4. **Data & Analysis** - Takes you to the Data & Analysis View where you can view and manage your respondents' individual responses.
5. **Reports** - Takes you to the Reports View where you can build and save aggregate reports featuring a variety of useful visualizations.

Survey View

[Survey](#) [Actions](#) [Distributions](#) [Data & Analysis](#) [Reports](#)

 [Look & Feel](#)  [Survey Flow](#)  [Survey Options](#)  [Tools](#) ▾

1

2

3

4

1. Use **Look & Feel** to customize the appearance of your survey.
2. Use **Survey Flow** (advanced) to configure custom branching for your survey. This is useful when you need to steer respondents to specific groups of questions based on certain criteria.
3. Use **Survey Options** to customize your survey's title in the respondent's web browser, set an expiration date, configure how your survey ends, and choose whether you want to anonymize responses to your survey by stripping out all metadata information that Qualtrics normally collects (usually this is not personally identifying).

4. Use the **Tools** menu to test your survey, export or print your survey, save a snapshot of your survey (Qualtrics constantly saves your work in the background, but snapshots enable you to roll back changes to an earlier state), translate your survey, and more.

Change Question Type

Multiple Choice 1 ✓

Choices

3 Edit Multiple 2

Automatic Choices

Answers

Single Answer

Multiple Answer 3

More...

Position

Vertical 4

Horizontal

More...

Validation Options

Force Response 5

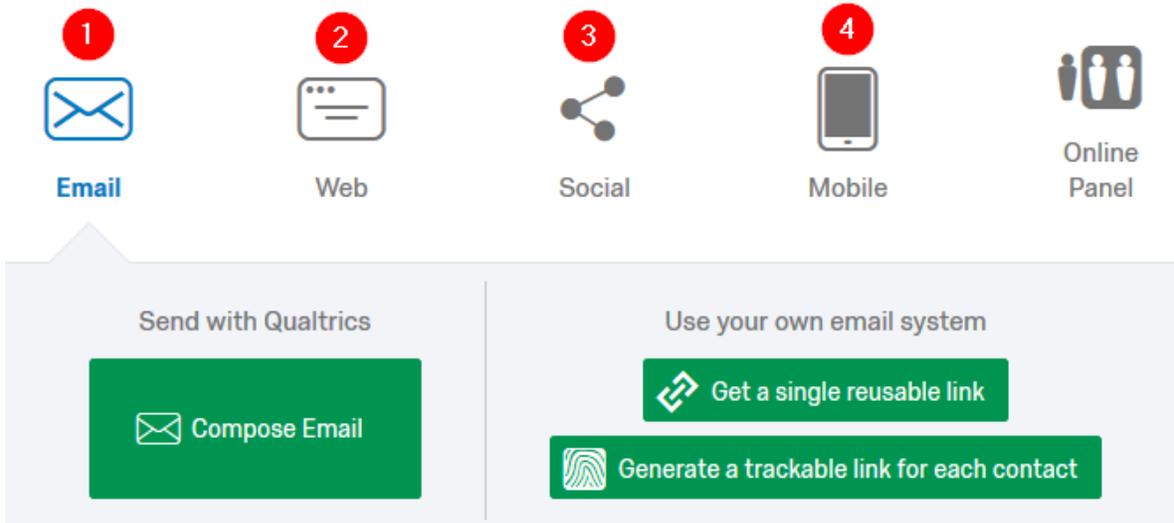
Within the Survey View, you will see the **Question Editing Pane** on the righthand side of the screen whenever you have a question selected. You can use the Question Editing Pane to do the following:

1. **Change the type of an existing question.**
For example, you could change a multiple choice question into a text entry question.
2. **Adjust the number of choices** the respondent sees or let Qualtrics suggest a series of choices automatically based on the type of question you're asking.
3. **Change how the question type operates.**
For example, you can change a single-answer multiple choice question to accept multiple answers instead.
4. **Change the appearance of the question.** For example, you can change the arrangement of the answer choices from a vertical column to a horizontal spread.
5. **Force your respondents to answer the selected question** by clicking the Force Response checkbox. (You can click the down arrow next to this option to choose whether to really force it or just prompt the respondent to answer it.)

Distributions View

The Distributions View is where you choose how to share your survey. You have a number of options to choose from. Begin by clicking on the  button in the top-right corner of this view. This will launch the Distribute Survey Wizard.

How do you want to distribute your survey?



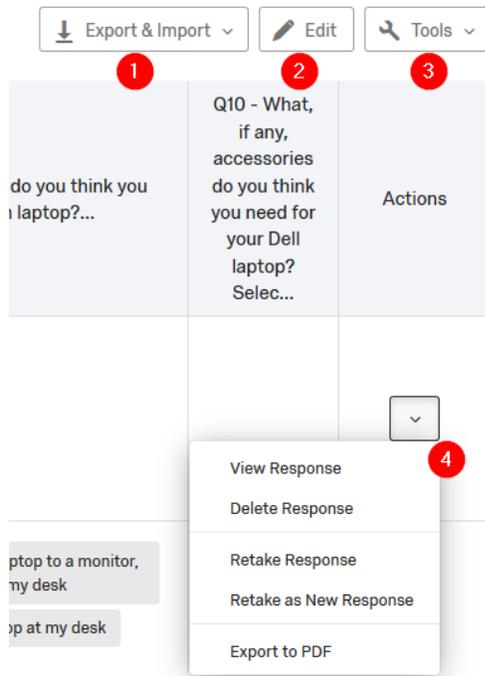
The screenshot shows a wizard interface with five main options: Email, Web, Social, Mobile, and Online Panel. The 'Email' option is selected and highlighted with a red circle containing the number '1'. Below the 'Email' option, there are two sub-options: 'Send with Qualtrics' and 'Use your own email system'. Under 'Send with Qualtrics', there is a green button labeled 'Compose Email'. Under 'Use your own email system', there are two green buttons: 'Get a single reusable link' and 'Generate a trackable link for each contact'. The other options (Web, Social, Mobile, Online Panel) are also numbered 2, 3, 4, and 5 respectively, but are not selected.

You can distribute your survey in four primary ways:

1. **Email** - Use this option to email your survey to respondents. You can send the email through Qualtrics, saving yourself time and hassle if you want to track responses to specific individuals, or you can email the survey through your SOU email using your survey's Anonymous Link (won't be able to identify respondents) or by generating unique tracking codes to do your own mail merge that will let you track respondents.
2. **Web** - Gives you your survey's Anonymous Link which you can then embed in your webpage as a link.
3. **Social Media** - Makes it easy to share your survey's Anonymous Link through several common social media platforms.
4. **Mobile** - Generate a QR code of your survey's Anonymous Link. (We do not have access to the full range of mobile options for.)

Data & Analysis View

The Data & Analysis View gives you access to your survey's individual responses. This makes it easy to review how individual respondents answered your questions and when they completed the survey. This view also is where you will go for the following:



1. **Export & Import Data** - Use this button to export/import responses to/from a file. The most versatile format you can export to is CSV, which is readable by Microsoft Excel.

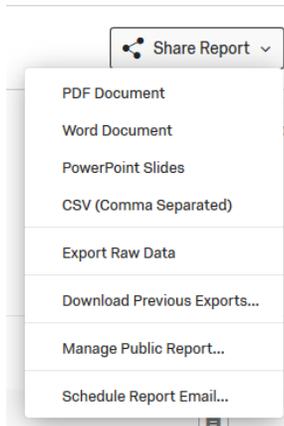
2. **Edit** – Use this to edit an individual's responses. Be very careful with this because it can invalidate your data!

3. **Tools** - Use the Tools dropdown to delete all responses or a subset of responses (such as preview responses that you generated while testing your survey), and customize the columns displayed in this view.

4. **Actions Menu** - Use the Actions Menu dropdown to view a specific response in more detail, delete the response, and generate a retake code in the event that a respondent needs to retake your survey.

Reports View

The Reports View is where you will construct detailed reports of your survey's aggregate data. The Reports View is covered extensively in our other training class dedicated to Qualtrics Reports. The most important piece to be aware of on this screen is the **Share Report** button, because that is where you will go to export your survey report to a file.



Step 1: Click on the Share Report button.

Step 2: Select the file format you want to use from the dropdown menu.

I recommend that you use PDF Document for ease of sharing or Word Document if you need to make minor edits before sharing it.

Getting Help

From within Qualtrics, click on the [Help](#) button at the top of the screen. In the next screen that pops up, click on the **Support Site** button to visit the excellent Qualtrics support website, and then search for what you need help with. You should only use the Contact Support button if you have been directed to use it by one of the IT professionals at SOU.



Qualtrics Support is your one-stop shop to learn how to use any part of the Qualtrics Platform. An entire library of articles, manuals, and troubleshooting tools - right at your fingertips.

[SUPPORT SITE](#)

[CONTACT SUPPORT](#)

For all other questions, please contact me directly:

David Raco
(541) 552-6893
racod@sou.edu