



# How to Build a Survey

**1. Log On to Qualtrics:** Open [www.qualtrics.com](http://www.qualtrics.com) and put in your username and password. Whenever you log into Qualtrics, you will go directly to the "My Surveys" tab. This is like a home page for you at Qualtrics, and it allows you to view and access your past surveys.

**2. Open a past survey:** Click on one of the links to a past survey. This will open the survey in the Edit Survey tab, allowing you to continue editing.



**3. Collaborate:** The Collaborate function allows you to share or co-author a survey in your account with another group or individual.



**4. Copy:** Use the Copy function to create a duplicate of your survey. You can use this duplicate as a template for yourself or for another Qualtrics user.



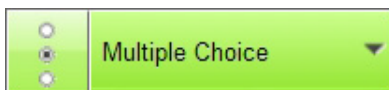
**5. Create a survey:** Click on the Create Survey tab. To create your survey from scratch, select "Quick Survey Builder". Give your survey a name, and select "Create". You will then be moved to the Edit Survey Tab.



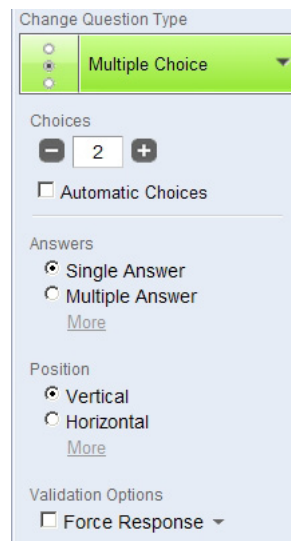
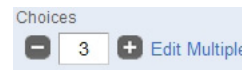
**6. Create questions:** Click on the Create a New Question link to add a new question to your survey. This option lets you create a new question in your survey, which can then be customized using the formatting panel to the right side of your screen.



**7. Change question type:** The green bar allows you to change the question type. At the bottom of the menu, you can select "Show All Question Types" to see every question type in Qualtrics.



**8. Add/subtract answer choices:** Click on the plus or minus sign, or use the Edit Multiple option.



**9. Edit question type:**

Beneath the green bar, you can format the layout, appearance, and options for that particular question type. Note that these options will vary depending on the type of question you have selected.

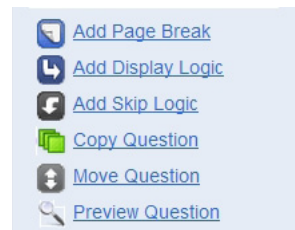
**10. Apply validation:**

*Force Response:* will force respondents to answer the question before they can move on to the next page in the survey.

*Request Response:* reminds the respondent that they left a question blank and gives them the option to return to it.

**11. Add page break:**

Select a question and click the Add Page Break link. This will put a page break directly below the selected question.



**12. Add display logic:**

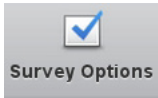
Select the question that you would like to display or not display, and select the 'Add Display Logic' function found in the formatting panel to the right side.

**13. Add skip logic:**

Select the question that will be used for the skipping criteria, and select the 'Add skip logic' function found in the formatting panel to the right side.

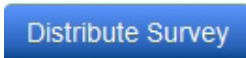
**14. Remove question:** Click on the red minus sign to remove the question from your survey. The question will be placed in your “Trash/Unused Questions” at the bottom of the page. If you removed a question in error, you will have the option to restore your question from the trash.

**15. Edit the Look and Feel:** The Look and Feel section allows you to format and personalize the overall appearance of your survey.



**16. Check Survey Options:** The Survey Options section allows you to customize the experience, protection, and termination options for your survey.

**17. Distribute your survey:** Click on the Distribute Survey tab to select a method of distribution. Upon entering this tab, you will first need to click “Activate Survey to Collect Responses” to activate the survey.



**18. Use Anonymous Survey Link:** Once your survey has been activated, you will see the link appear under the Survey Link icon. Highlight and copy this link to paste it into an email message in your personal email account or post it somewhere online. It is an anonymous link, so it will not collect any personal information except an IP address.



**19. Use Survey Mailer:** The Email Survey option allows you to distribute your survey through the Qualtrics Mailer creating a unique link for each recipient. To utilize the Survey Mailer, you must first create a panel in Qualtrics.



**20. Create a Panel:** Panels are mailing lists used in the Survey Mailer form of distribution. Go to the Panels tab to upload a new panel.



**21. Distribute to panel:** Return to the Distribute Survey tab and select “Email Survey” under the “To” field, select your own library, then the panel name, then “Select Entire Panel”. Select when to send out the email, then enter your survey invitation message and select “Schedule Mailing” when ready.

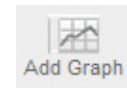
**22. View results:** Click on the View Results tab. View Reports is the default option shown when you first come to the View Results tab. If this is your first time in this tab, you will see an “Initial Report” which sorts all your data by question.



**23. Navigate through questions:** You are initially only shown the results for the first question, but you can switch to any other question by clicking on it. In the center of the screen you will see the results for the currently selected question



**24. Add graph:** While viewing a question, you may click on the Add Graph button on the right of your screen. This will insert a bar graph at the top of your results. This can easily be customized by selecting any of graph types shown above the graph.

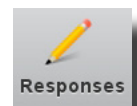


**25. Filter by subgroup:** Subgroups allow you to isolate a group of respondents and view only their responses for the entire survey. To set this up, select “Add a Subgroup to This Report” and use the dropdown menus to set up a condition upon which a filter will be created.



**26. Drill Down:** The Drill Down feature allows you to categorize your survey by the answer choices of a specific question. Select the question you would like to categorize by and then click “Drill Down”. This will tabulate each question according to the filter you have set up.

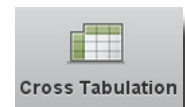
**27. Responses:** The responses page allows you to see an individual survey report for each respondent. Clicking on the Response ID for each respondent allows you to see their individual survey report.



**28. Download Data:** Use this page to export your raw data out to another program. Simply click on the program you would like to download the data into.



**29. Cross Tabulation:** Click the “Create a New Cross Tab” link and then select banners and stubs. Then select “Create New Cross Tab” and the Cross Tab will be generated.



**30. Questions?** You are welcome to call our support team at 800-340-9194 or sign up for additional training at [www.qualtrics.com/training](http://www.qualtrics.com/training).