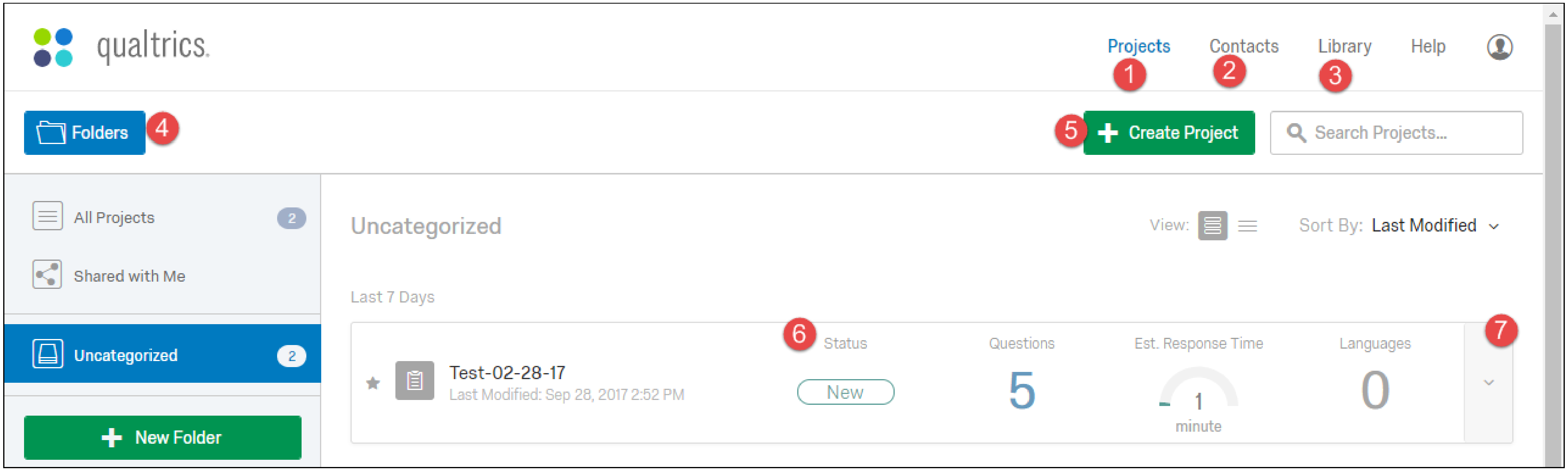
Qualtrics Quick Reference Guide



1	**Projects**	Where you create and organize surveys.
2	**Contacts**	Create, manage and share mailing list.
3	**Library**	You can store and share surveys, graphics, messages, and other files in Qualtrics libraries.
4	**Folders**	To organize Projects and Libraries you can use.
5	**Create Project**	To create a survey/project, click the Create Project button.
6	**Status**	In My Projects, each project displays quick status for project/surveys.
7	**Project Actions**	Every Project has a Project Action menu located in the drop-down to the far right.

Completing Self Enrollment

1. In a Web browser, navigate to https://lamaruniv.co1.qualtrics.com/.
2. Enter your LEA credentials (jsmith) and password.
3. On the next screen, click **I don't have a Qualtrics account.**
4. Review the Terms of Service and click **I accept.**

Creating a Project

Note: Project is the new term for surveys created in Qualtrics

1. On the **My Projects** page, click **Create Project**

   Optional: *Select a folder*
2. In the Create a Project pop up, enter the Project Name or select from the **Create From Existing** options on the left to create a project **From a Copy, From a Library,** or **From a File**

   Note: *The file type to create from a file is an exported **.qsf** file, which stands for **Qualtrics Survey Format***
3. Click **Create Project**

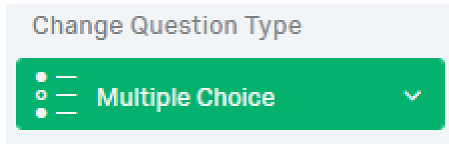
Creating & Arranging Questions

Creating/Adding Questions

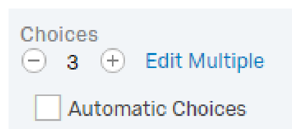
1. Open the project
2. Click **Create a New Question.**

Note: *The default question type is **Multiple Choice**.*

3. If desired, under **Change Item Type** on the right, click the drop-down menu and click the desired type to change the question type.



4. Enter the question text in the proper field
5. If needed, type the choices for the question in the proper fields.
6. If desired, click the **–** or **+** buttons under **Choices** on the right panel to add or delete choices.

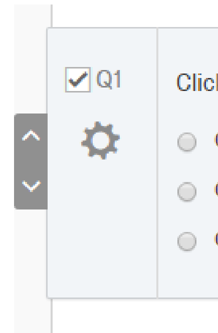


Note: *Checking the box for Automatic Choices brings up options for choices that best match the question type such as a five point Likert scale for a matrix table question.*

Moving Questions

1. Open the desired project
2. Place the cursor over the desired question.

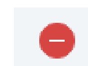
   An icon with arrows will appear on the left.



3. Click the down arrow to move a question down
   a. Or click the up arrow to move a question up

Deleting Questions

1. Open the desired project
2. Place the cursor over a question
   a. The **Remove Question** icon appears on the right



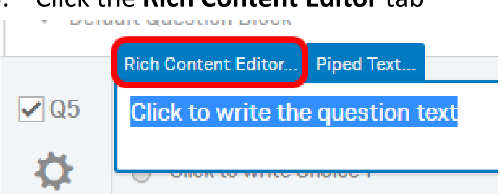
3. Click the **Remove Question** icon

Editing Questions

Rich Content Editor

Question

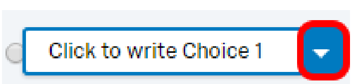
1. Open the desired project
2. Click the desired question text
3. Click the **Rich Content Editor** tab



   a. A text editor window will pop up
4. Format or edit the desired text
5. Click anywhere outside the formatting box to exit the **Rich Content Editor**

Choice

1. To use the **Rich Content Editor** for choice text, click the choice text
2. Click the dropdown arrow to the right and select **Rich Content Editor**

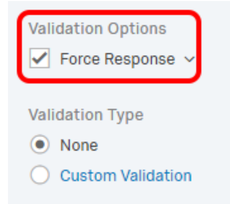


3. Format or edit the desired text
4. Click anywhere outside the formatting box to exit the **Rich Content Editor**

Force Response

***Note:** When this option is selected, it requires a compulsory answer to the question from the user.*

1. Open the desired project
2. Click the desired question
   a. Question tools will appear on the right
3. Under **Validation Option**, check **Force Response**.



Survey Options

1. Open the desired project to edit
2. Under the **Survey** tab, click **Survey Options**

***Note:** The **Survey Options** window will open.*

3. Check the desired boxes related to the actions
4. Click **Save** when finished
5. Click **Save Flow** when finished

Preview Survey

1. Open the desired project
2. Click **Preview Survey** under the **Survey** tab

***Note:** This will preview the survey both in a browser view and a mobile view*

3. To exit the preview, click **Close Preview**

Creating Contacts

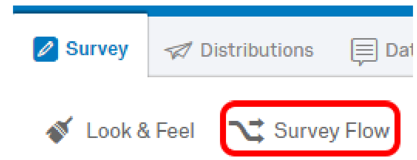
Creating a Contact List

1. Click the **Contacts** tab > **Create New Contact List.**
2. Enter the list name in the **Name** field.
3. Select a folder, if desired.
4. Click **Next.**
5. Click the desired method of adding contacts.
   a. **Import From a File** – upload a spreadsheet of members.
   b. **Add Manually** – fill in a form.

   Import From a Survey – survey responses to build your panel.
6. Click **Add Contacts**

Editing a Survey Flow

1. Open the desired survey to edit.
2. Click the **Survey Flow** icon in the grey navigation bar.



3. To add a new element, click **Add a New Element Here**.
4. Click the desired element, e.g., **End of Survey**.
5. If desired, click **Move** and drag it to the desired location.
   a. Or, by clicking the element and pressing the **Up** or **Down** arrow key on the keyboard.

***Note:** If desired, to add element(s) between blocks, click **Add below** with a block.*

Exporting Features

Exporting Data

1. Open the desired project and click the **Data & Analysis** tab
2. Click **Export/Import**
3. Click **Export Data**
4. Click **Export Complete Data Set**
5. Select the file type among the tabs listed for CSV, XML, SPSS, and other types of files
6. Click **More Options** to change the options for the downloaded data
7. Click **Download**

Note: *Files are automatically set to be compressed as a .zip file. Uncheck the "**Compress data as .zip file**" box under **More Options** to download an uncompressed file*

Exporting a Survey

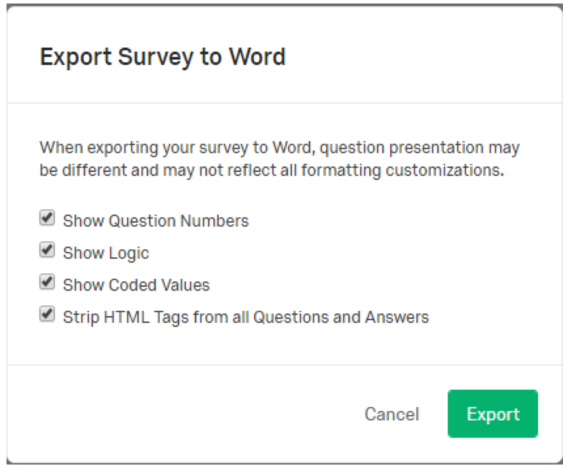
Note: *A Qualtrics format (.**qsf**) file will be downloaded.*

1. Open the desired project and click the **Tools**
   a. drop-down menu > **Export Survey**.
2. Save or download the file.

Exporting Survey to Word

Note: *A Microsoft Word format (.**docx**) file will be downloaded.*

1. Open the desired project and click the **Tools** drop-down menu > **Export Survey to Word**
2. If desired, check or un-check the following options.



3. Click **Export**.
4. Save or download the file.

Importing a Survey

Note: *Only .qsf (Qualtrics Survey Format) files can be imported*

1. On the **My Projects** page, click **Create Project**
2. On the left, select **From a File**
3. Click **Choose a .QSF File** and navigate to the desired survey
4. Click **Open**.
5. Enter a **Project Name** and if desired, select a folder
6. Click **Create Project** when finished

Closing a Survey

1. On the **My Projects** page, click the **Actions** button to the right of the desired survey
2. Click **Close** from the dropdown
3. In the window that pops up, select whether to **Close all active survey sessions and record them as partial data** or **Allow all active survey sessions to be finished**
4. Click **Pause Response Collection**