

Interface

Users operate the Qualtrics software through an interface called the "Control Panel." The Control Panel divides the survey process into six chronologically ordered "Tabs":

- A. My Surveys
- B. Create a Survey
- C. Edit a Survey
- D. Distribute Survey
- E. View Results
- F. Library

My Surveys

Users start on the “My Surveys” tab. When this tab is selected, you will see a list of all the surveys in your account. Surveys created in your account appear under the heading “My Surveys.” If your account includes surveys that have been shared with you by other users, a section titled “Shared Surveys” will appear below the “MY Surveys” section. You may also choose to display only one of these two sections by using the subtabs “My Surveys” and “Shared Surveys.”

Each Survey in your list is accompanied by eight buttons:

1. View
2. Edit
3. Copy
4. Sharing
5. Send
6. Results
7. Delete
8. Activate/Deactivate (Toggle)

View

Clicking on this button will allow you to see and take the survey as a regular respondent would. If you complete the survey, your responses will be saved as survey data. You may remove your responses on the View Results > Edit Results. The words “Survey Preview” will appear in the “Respondent” column for this result.

Edit

Clicking on this button will take you to the “Edit a Survey” tab. The only difference between using this button and using the tab is that the button will open the editor for the survey next to it while the tab will either require you to choose a survey to open, or open the survey you have already been working on.

Copy

Note: THIS OPTION SHOULD NOT BE CONFUSED WITH “SHARING.” If you are part of a larger brand, copying a survey into another account releases your control over that survey—the person you send it to will have complete access and control over that copy. To share a survey without granting that level of access, see “SHARING”.

This button will create a duplicate of your survey. Clicking on the button will bring up a window with two options:

1. “Copy this survey to the library”. You will be asked to choose a library (if you are not part of a larger brand, the library on your account will be your only option). You will also need to name the survey, and create a category to place it in. If you have already copied other surveys into the library, you may choose the categories you created for them.

Copying a survey to a library creates a template for future use. Surveys in the library may not be altered or edited. To edit a survey in the library, copy it back into your account.

2. “Create a working copy of this survey with a different name or copy this survey to another account”. You will be asked to name the new survey copy, and specify its

destination from a drop-down list. This option will give you an identical copy that can be edited and changed without altering the original survey.

Sharing

Clicking on this button will allow you to share this survey with others in your brand. If you are a single user not part of a larger brand account, this feature will be disabled.

Sharing a survey allows you to give others access to a survey at a level you specify. You will be asked to select the user to share the survey with, and you will also be given a set of 28 permissions that you can turn on or off for the person you're sharing with.

Send

This button will take you to the "Distribute Survey" tab. The only difference between using this button and using the tab is that the button will open the distribution page for the survey next to it while the tab will either require you to choose a survey to open, or open the survey you have already been working on.

Results

This button will take you to the "View Results" tab. The only difference between using this button and using the tab is that the button will open the results page for the survey next to it while the tab will either require you to choose a survey to open, or open the survey you have already been working on.

Delete

This button will permanently delete the survey. A window prompting you to enter your account password will pop up and must be filled out before the survey can actually be deleted.

Activate/Deactivate (Toggle)

This button toggles the survey's status between "active" and "inactive." Inactive surveys cannot be distributed or taken. The main purpose of this functionality is to allow you to close your survey when you have collected sufficient data. Simply deactivate the survey to disallow any more responses.

When you deactivate a survey, all partial data will be recorded. This means that any half-finished surveys, which the respondent could have potentially completed at a later time, will be closed, and the data from the questions they did answer will be recorded.

The secondary tab "Survey Options" underneath the "Edit a Survey" tab has additional options relating to inactive surveys, such as the message displayed to respondents who try to take an inactive survey, a survey expiration date, etc.

NOTE: When you deactivate a survey distributed through the mailer, all links for that survey automatically expire. If you desire to re-activate and allow those people from your mailing who never took the survey to do so, you must re-send the survey to those people.

Create a Survey

This tab provides you with three different methods of survey creation.

Survey Wizard

This method gives you a step-by-step walkthrough of the survey creation process, starting with giving the survey a name (go ahead, name it something funny, respondents don't see the survey name) and choosing a skin. "Survey Skins" provide different options for the appearance of the survey. Following those choices, you will begin adding questions. For help on adding questions, see the "Add Questions" section within the "Edit a Survey" section.

You may stop adding questions using the wizard at any time. You may add more questions at any time afterwards from the "Edit a Survey" tab.

Note: All questions added using the Survey Wizard are added to the Default Question Block.

Start from Scratch

After asking you to name the survey, this method opens up a blank survey within the "Edit a Survey" tab. Experienced users may find this option more convenient than the survey wizard.

Survey Library

This method lets you copy a survey from a library into your account. You may edit and modify the survey once the survey is in your account. When you click on this button, you will be asked to choose a library, a category from that library, and a survey in that category. The Qualtrics library is available to all users. If you are a corporate or academic user, your organization may also have a library for you to choose from. You will be asked to name the survey, and choose the account into which you want to copy it. It will then appear in the "My Surveys" screen.

Edit a Survey

This Tab opens up the editor, where most of your work will be done. There are four subtabs in "Edit a Survey":

Edit Questions Tab:

This tab is where you will build and organize your survey. There is a group of four "Quick Task" buttons at the top of the screen. "Preview Survey" allows you to take the survey just as a respondent would, and see it just as he would see it. The "Survey Link" button will be covered in the "Distribute Survey" section of this help document. The "Add Question Block" button will be discussed later in this section. "Print Survey" sends the survey to your printer. It prints in a simplified html form.

The first thing you will see in your survey is the "Default Question Block." Your survey is organized by Question Blocks. A Question Block is a group of questions that stick together in the survey. Having your survey divided into blocks allows you to choose groups of questions you may want only certain people to see (or may not want them to see, based on their answers to a previous question) and to randomize the presentation and order of certain blocks, or to randomize questions within the block.

The Default Question Block always appears first in the survey. Any questions you add to the Default Question Block will be anchored at the beginning of the survey. To add additional question blocks, click the "Add Question Block" button and give the block a name. Any block other than the Default Block has a button called "Set Block Options" that does not appear on the Default Block. Otherwise, the other blocks in your survey function the same way as the Default Question Block.

Each block has five buttons across the top right section of the block's header:

A. **Add Question** :




Clicking this button will take you to the question selection screen.

1. The question selection screen has three drop-down menus.
 - i. You will begin by choosing the type of question you wish to add in the first drop-down menu.
 - ii. The second menu lets you select the general presentation of the question. This may also be changed at a later screen.
 - iii. The third drop down menu will help you identify whether you will be using text or graphics in your question.

Note: Before you click the "Add This Question" button at the bottom right, you will be shown a preview of the question you have chosen to create. This allows you to be certain you have chosen the right type of question.



2. After clicking on the "Add This Question" button, you will see the question writing screen (for all questions except "Descriptive Section" question types labeled "without text block"). Enter your question text in the first box. Enter the answer choices, one per line, in the second box. You may use the "commonly used response scales" option provided below the second box to populate the box with pre-written answer choices. You may choose how many choices you want to appear from the scale you choose, and you may reverse the order they appear in by checking the "Reverse Order" box. You may also choose to insert choices used

in a different question in the survey by clicking "Advanced Function: Choice Options." Once you have finished writing the question, click the "next" button.



3. Question Writing Tool Bar: these buttons function only for the first box on your screen, the "question entry box", and not for the second box, the "response choice entry box".
 - i. **Text color**  : Use this button to change the color of the characters in your question text.
 - ii. **Background color**  : This button will highlight the text with the color chosen.
 - iii. The font name, font size, bold, italic and underline buttons should be self-explanatory. These function like familiar word processing commands.
 - iv. **Paste Buttons**  : These buttons will bring up a notepad for you to paste text into. The purpose of this function is to assure that the formatting of the text is correct for the survey. Once you have pasted text in the notepad, click the OK button, and the text will appear in the question entry box. The first notepad is to be used with text from programs other than Microsoft Word. The second notepad is specifically for pasting text from Microsoft Word. This notepad will remove the junk code that accompanies text pasted from Word.

Note: When using Internet Explorer, the Microsoft Word paste button will not bring up a notepad but will automatically remove the formatting and paste the text into the question entry box.



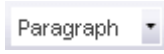














For the choice entry box (the second box on your screen), you may paste directly into the box without worrying about the formatting

- v. **Undo and Redo**  : These buttons will undo or redo the last action performed.
- vi. The next five buttons (Justify Left, Justify Center, Justify Right, Numbering, and Bullets) function like familiar word processing commands.
- vii. **Smart Text**  : This button pulls information into your question text from a source outside of the question. The system refers to this function as "piping." You may pipe text into your question from the following sources:
 1. Survey Question: You may pipe text from a different survey question into the question you are writing. You will choose the question to pipe text from, and then you will choose which part of the question you want to pipe. You may choose from the following parts:
 2. The question text itself.
 3. Any of the answer choices for that question.
 4. All of the answer choices for that question.
 5. Only the choice(s) they selected.
 6. Only the choice(s) they didn't select.

Note: When previewing the survey question, the piped text will not appear as a survey respondent would see it. To see the question the way a respondent would, you must preview the survey.

7. Loop and Merge Field: Loop and Merge is the ability to select multiple categories and have the block loop through all the questions in the block for each category you've created. (e.g. FastFood = McDonalds, Burger King, Wendy's). Using the Loop and Merge Smart Text option allows you to specify the category seen in each of the questions.
 8. Panel Field: You may pipe text from your panel, if you are sending your survey using the mailing list (panel). You will choose a field from the information you have uploaded with your panel to pipe into your question. For example, if you have a field in your panel for the respondent's first name, you may choose that field to pipe their first name into the question you are writing. The system will automatically match the first name in the question with the email address to which the survey is sent.
 9. Embedded Data Field: This transfers any data specific to a participant from your panel list into the question text. (e.g. You said you live in 'Seattle'. Do you still live there?)
- viii. **Qualtrics Graphic** : This button allows you to insert a graphic into the question from your Graphic Library. You must add the graphic to your library before you can insert it into the question. You will be asked to choose the library, the category (which you created yourself when you added the graphic to your library), and the graphic within that category.
- ix. **You may expand the toolbar** by using the  button at the end of the row. This button brings up additional options.



- x. **Remove Formatting**  : Clicking this button will remove the formatting from any text you have highlighted.
 - xi. **Paragraph**  >  : This dropdown menu has nine preset formats that you can apply to your text.
 - xii.  >       : These buttons are used to create superscripts, subscripts, insert special characters, insert hyperlinks, insert tables or charts, and insert a line.
 - xiii. **Indent/Outdent**  >   : Initially only the "indent" button is available. This button will indent an entire paragraph of highlighted text in the question entry box. The "outdent" button will cancel the indent.
 - xiv. **Preview**  >  : This button will open a window which shows you a basic preview of the text in the question box.
 - xv. **View/Edit Source**  >  : This button will give you access to the HTML source code for the text in the question box. Here you can customize any presentation of the question using HTML and JAVA.
4. The Randomization, Validation, and Data Analysis screen:
- i. Randomization: There are four choices presented for this function.
 1. "No Randomization" is the default selection. With this option selected, the answer choices for this question will appear in exactly the order you typed them in for every survey respondent.
 2. "Randomize the order of all choices": with this option selected, the answer choices for this question will all appear in random order for every survey respondent. No answer choices will be excluded.
 3. "Randomly present ___ of the total choices (2 or more)": with this option, you may choose the total number of choices you want each survey respondent to see for this question. For instance, if you have 7 total choices, and you enter the number "4" in the blank space after "Randomly present", survey respondents will see a random selection of 4 of the 7 choices. 3 randomly selected choices will be excluded each time.
 4. "Use Advanced Randomization": with this option selected, clicking on the "next" button will bring up a screen of advanced randomization options. The choices as they appear in the box on the left (labeled "Fixed Display Order" box) are anchored. Respondents will see them in the order they appear in this box. By highlighting the choices in this box and moving them into one of the three boxes on the right, you may begin to randomize the choices.

Note: You may place *some* choices in the boxes on the right and leave the rest in the Fixed Display Order box. Choices in the Fixed Display Order box will be anchored in the order they appear in there, with any randomized choices appearing in the locations you place them in.

- a. "Randomized Choices": all choices in this box will be randomly presented. No choices will be excluded.
- b. "Random Subset": a random subset of these choices will be presented. You designate the size of the subset in the space directly above the box.

- c. "Unused Choices": The choices placed in this box will not be displayed. This box is useful for choices you decide not to display now but may want to display later.
- ii. Validation: this function is fairly self-explanatory. Clicking the box that says "require response" will set the survey to not allow any respondent to move past the page on which the question appears until they have answered the question.
- iii. Data Analysis:
1. Recode Values: This function allows you to change the signifier given to each answer choice in the data set downloaded at your project's end (View Results > Download Data). Changes here will only apply when you choose the "answers as values" option on "Step 2" of the download. These "values" will signify the respondent's answer to the question. In the example below, the values for the first question have been recoded to the numbers 96-99. As you can see, the answer choice coded "97" was not chosen by any respondents shown here.

Who would win a football game between Qualtrics and the 1985 Chicago Bears?	What would you choose?	Is Qualtrics?	When asked?	Who would win?
	96			
	98			
	96	1	3	3
	99	5	3	2
	99	1	1	

2. Variable/Choice Naming: This function allows you to change the signifier given to each answer choice in the data set downloaded at your project's end (View Results > Download Data). Changes here will only apply when you choose the "answers as labels" option on "Step 2" of the download. These "labels" will signify the respondent's answer to the question. Before recoding, the labels will be the text of the question answer, as shown below.

Who would win a football game between Qualtrics and the 1985 Chicago Bears?	What would you choose?	Is Qualtrics?	When asked?	Who would win?
Qualtrics				
Qualtrics and it wouldn't even be close				
Qualtrics		1	Yes Mike	Q no longer means Q
Qualtrics and the game would be called off after the first quarter by the Chicago Bears		5	Yes Mike	The Bears Jo. Snow
Qualtrics and the game would be called off after the first quarter by the Chicago Bears		1	Domination wasn't even a word u	

3. Grading

4. Analysis Type: This function allows you to choose the type of graph or chart that will be displayed for this question in the system's internal report writer (View Results > Detailed Report). You may also change the type of graph later when building the report.
5. The Preview and Label Screen:
- i. Question Label: This option allows you to re-name this question *as it appears within the system* on the "Edit Questions" screen and on the "Detailed Report" screen (this is for your eyes only—no survey respondent will see your label). As a default, the question text is chosen. You may click the button "Specify a Static Label" and enter a different identifier. A common use of this option is adding question numbers to a survey in which the questions won't be numbered for respondents. See the graphic of the "Edit Survey" screen below, where the third question label has been changed.

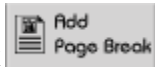
When asked earlier if Qualtrics is as dominant as the 1985 Chicago Bears, you said that Why did you say this?	Edit	Copy	Remove	Move	Up Down	View	Add
Who would be the best QB for Qualtrics?	Edit	Copy	Remove	Move	Up Down	View	Add
Question #8	Edit	Copy	Remove	Move	Up Down	View	Add

- ii. Export Tag: This option allows you to re-name the question tag *as it appears on the data set* you will download at project's end. No survey respondent will see your export tag. You will need to click the radio-button for "Step 3: Download Using Export Tags: Yes" for the export tags to take effect. The export tag in the graphic below has been changed to "GaryJ".

Q1	Q3	Q4	Q5	Q13	GaryJ_1	GaryJ_2
Who would	What would	Is Qualtrics	When asked	Who would	Question #8-Gary Thornock	Question #8-Jim McMahon
96						
98						
96		1	3	3		
99		5	3	2	1	
99		1	1			

- iii. "Still not what you wanted?" This section gives you options to make last-minute alterations before saving the question. You can change the options you chose in the second and third drop down boxes on the question selection screen at the very beginning. Also, some question types have other changes specific to themselves that will be displayed here.

B. Add Page Break



If you haven't chosen a survey skin that allows only one question per screen, your survey questions will, as a default, be displayed together on one page. Clicking on this button will bring up a window prompting you to choose the question after which to insert the page break. The page break will appear in the question block as a blue marker that takes up an entire line. On its line are buttons that enable you to move the break one question up or down, or to delete the page break.

Note: Sometimes a page break is required for certain functions to work. One of these is the "Qualtrics Smart Text" or "Piped Text" function, *if the piped text refers to an answer in a previous question*. In this case, a page break must be inserted between the question from which you are piping and the question to which the text is piped.

Note: Page breaks can occur automatically when other functions in the system are used. Page breaks will automatically occur:

1. At the transition between question blocks.
2. After any question with skip-logic

C. Add Skip Logic



This is one of the simplest ways to customize a survey. Skip Logic works within question blocks to skip respondents past a question or questions based on their answer to the question immediately preceding the question(s) to be skipped.

Click on this button at the top of the block into which you desire to insert skip logic. You will be shown a pop-up window with several drop-down boxes and the large red words "If", "Is", and "Then Skip To". Click on the first drop down box and choose the question to which you want to add the skip. This question will be

the “hinge” for the skip, so to speak—the way a person answers this question will determine whether they will skip the next question(s) or not.

Next, you will choose the answer choice you desire to use in the logic for this skip, and ALSO the way that choice is answered. For example, you may choose to skip if the answer you chose “is selected,” “is not selected,” “is displayed,” “is not displayed.”

Next, you will choose the question to which the respondents will be skipped. NOTE THAT THIS IS NOT ASKING YOU TO CHOOSE THE QUESTIONS TO SKIP, but rather the *first* question that will not be skipped. All questions between this one and your “hinge” question will be skipped.

Your box will end up with a clause saying something like this:

“If Question – Are you a golfer? Choice – Yes:Choice **Is Selected**, **Then Skip To** How many times a year do you typically golf?”

You will also notice the check-box labeled “Include Quota.” If you have a quota set on your survey, you can check this box and choose the quota from the drop-down list (if you have more than one quota on the survey, make sure you choose the right one). This will change the clause to say something like “If Question – Are you a golfer? Choice – No:Choice **Is Selected**, **And if Quota: Non-Golfer Limit Has Been Met Then Skip To** End of Survey.”

D. **Set Block Options** :

This button does not appear on the default block. None of the functions this button accesses are available for the default question block. If you have already created your questions in the default block and need to use one of these functions, don’t despair! You can copy the block using the “Copy Block” button.

There are three tabs in the window that pops up when you click this button. The first has instructions for the other two. It also gives you the option to (1) change the name of the block and (2) lock the block so the questions and flow can not be edited. The two other tabs:

1. Question Randomization: This tab controls the randomization of questions within this block. There are three options:
 - i. Do Not Randomize Question Presentation (Default): when this option is selected, no randomization will be applied to the questions in the block.
 - ii. Randomize Showing ___ Questions Per Page: when this option is selected, each page will show the number of questions you have specified, randomly selected. If there are not enough questions to fill the last page with the number you specified, the number of questions on that page will be smaller.
 1. Randomize Question Presentation: selecting this option allows you to access the bottom portion of this page with the randomization functions there. These functions are identical to the “Advanced Randomization” functions you use when building a question.

The questions as they appear in the box on the left (labeled “Block Question Flow”) are anchored. Respondents will see them in the order they appear in this box. By highlighting the questions in this box and moving them into one of the three boxes on the right, you may begin to randomize the questions.

Note: You may place *some* questions in the boxes on the right and leave the rest in the Block Question Flow box. Questions in this box will be anchored in the order they appear in there, with any randomized questions appearing in the locations in which you place them.

- a. "Randomized Questions": all questions in this box will be randomly presented. No questions will be excluded.
 - b. "Random Subset": a random subset of these questions will be presented. You designate the size of the subset in the space directly above the box.
 - c. "Unused Questions": The questions placed in this box will not be displayed. This box is useful for questions you decide not to display now but may want to display later.
2. Loop and Merge: There are three options you have available when looping and merging.
- i. Do not use Loop and Merge within the question block (Default Setting)
 - ii. Use a *static* Loop and Merge. This allows you to create a customized Loop and Merge field. You can add in all of your elements here or pipe them in from a CRM Database.
 - iii. Customized Loop and Merge. This allows you to pick a question from a previous block and loop over those responses from the participant

E. **Copy Block**  :

Clicking on this button will bring up a box asking you to enter the name of the duplicate block. When you have done so and clicked on "Copy Block", an exact duplicate of the original block will appear at the bottom of the "Edit Questions" page, with the name you specified.

F. **Preview Block**  :

Clicking on this button will open a preview of this block as it would appear to a survey respondent. Use this button instead of the "Preview Survey" button at the top of the "Edit Questions" page when you wish to preview something in a block at the end of a long survey.

Survey Options Tab:

This tab contains a miscellany of options for your survey. When you make changes to any of the options on this page, make sure you hit the "Save Changes Now" button before navigating to another tab.

A. **Survey Name:**

Type a new name on this line and hit "Save Changes Now" to re-name your survey.

B. **Back Button:**

Check this box to give respondents a back button. The button will only allow them to go back to the beginning of the current block.

C. **Survey Language:**

You probably got excited when you mistakenly thought this button would translate your whole survey into any of the languages available in the dropdown. Didn't you? Well who do you think we are? This button only changes the language of the instructional and error messages the system displays to a survey respondent (i.e. "the value entered must be between 1 and 10"). So, if you have written a survey in Arabic, you should set this box to Arabic.

D. **Survey Header and Footer:**

Text entered here will appear at the top or bottom of every page in your survey. Make sure to preview the survey with your header and footer; some survey skins handle headers and footers differently than others, and you may or may not like the outcome.

E. **Progress Bar:**

To give your respondents an idea of how close they are to the end of the survey. If your survey is long with many pages, you may want to include a progress bar to keep them from going insane (and to increase your survey completions rate).

F. **Allow anyone to take this survey / Allow only those who receive invitation emails to take the survey (requires Qualtrics Mailer):**

This is an admittedly limited use option. Any time you send your survey using the Qualtrics Mailer, your survey will be limited to those you sent it to. However, if you had *previously* distributed the default survey link for pre-testing purposes or as a distribution method you decided to cancel, choosing to limit the survey takers to those who received the invitation email will deactivate the default link.

G. **Survey Password:**

If you enable this option, a page requiring the password you specify will appear as the first page of your survey. This page will have the same color scheme as the rest of your survey.

H. **Prevent Ballot Box Stuffing:**

This function is only necessary if you are NOT distributing your survey via the Qualtrics Mailer. The Qualtrics Mailer sends each respondent a unique link, which means no respondent can take the survey twice. The other distribution options use a *generic* link which is the same for every respondent. When "Prevent Ballot Box Stuffing" is turned on, the system will put a cookie on the computer of each respondent who takes the survey via the generic link. The cookie will not allow that person to come back in and take the survey once they have completed it.

I. **Survey Expiration:**

The default setting here is "This survey does not expire." If you want your survey to turn on and shut off after a certain date, choose the second check box and enter the "valid from" and "valid to" dates.

Note: Survey Expiration and Survey Deactivation are two different ways to make your survey unavailable. An expired survey is not necessarily an inactive survey. Activation and expiration are different functions. If you have an expired survey that you wish to re-distribute, you must not only turn off the expiration date, but make sure the survey is active as well.

J. **Record Partial Data:**

You may set this option to close surveys that have not been finished and record the partial data (the questions the respondents did answer) in your results.

The Qualtrics system allows survey takers to return and finish a survey if they have exited halfway through. When you set the Record Partial Data option, you are disallowing respondents to return and finish their survey if a certain amount of time has elapsed since they left it.

K. **Survey Termination:**

Several options for ending the survey are available here. You may choose to have respondents shown a default message, which says "We thank you for your time spent

taking this survey.” You may also choose to have respondents shown a message from your library (you must create the message in your library before you can insert it here). In the first dropdown box, choose the library the message is in. In the second dropdown box, choose the message.

You can also re-direct the survey takers to another web page by checking the radio button and entering the URL for that page in the box given.

L. Thank you email:

IF YOU DISTRIBUTED YOUR SURVEY USING THE QUALTRICS MAILER, you may create a thank-you message in your library and have it automatically emailed to every respondent who completes the survey. Click the check-box, and in the first dropdown box choose the library, and in the second dropdown box choose the message.

M. Inactive Survey Message:

The system has a default message that will be shown to people who attempt to take a deactivated survey. If you would like to show a custom message (i.e. to tell them a date when the survey will become active again), click the radio button and choose the library in the first drop-down box and choose the message in the second drop-down box. You must create the message in the library before you can activate it here.

N. Survey Look and Feel:

You may come to the “Survey Options” tab and change the survey look and feel at any point. We call these different look and feel templates “skins.” First, choose a library from the first dropdown menu (many accounts will only have one library available). The second dropdown lets you choose between skins that allow multiple questions per page and those that allow only one question per page.

Note: If you choose a skin that allows only one question per page, this will override the page structure you may have built into your survey (page breaks, etc.). There will never be more than one question on any page.

O. Survey Response Sets:

Think of a response set as a “bucket” into which data is collected. Normal data collection places all of your data into the “Default Response Set.” For most surveys, this is sufficient. However, you may create other response sets which will split your completed data into discrete groups that can be viewed and downloaded separately. Response sets can differentiate your data in two ways:

- a. By Time: When you activate a new response set, all future incoming data will be placed in that response set rather than the old one. This will give you data in two sets (for example, a pre-October 15th and a post-October 15th response set).
- b. By Mailing: Using the Qualtrics Mailer, you may specify the response set into which the data for a particular mailing will be placed.

To create a new response set, click on the “Manage Response Sets” button. You will be shown a window with two boxes. The top has a list of the response sets you have created. To create a new response set, click the “add response set” button. To activate a response set and make it the one into which all data is placed from this point on, highlight the response set and click on “Set as Active.” Only one response set may be active at a time.

The active response set will collect all incoming data unless it is overridden by a response set assigned to a particular mailing. Data for such a mailing will always be

collected into that mailing's assigned response set. If you have a survey with multiple distribution methods, including a mailing with a response set assigned, the data for that mailing will go into the assigned response set and all other data will go into the active response set.

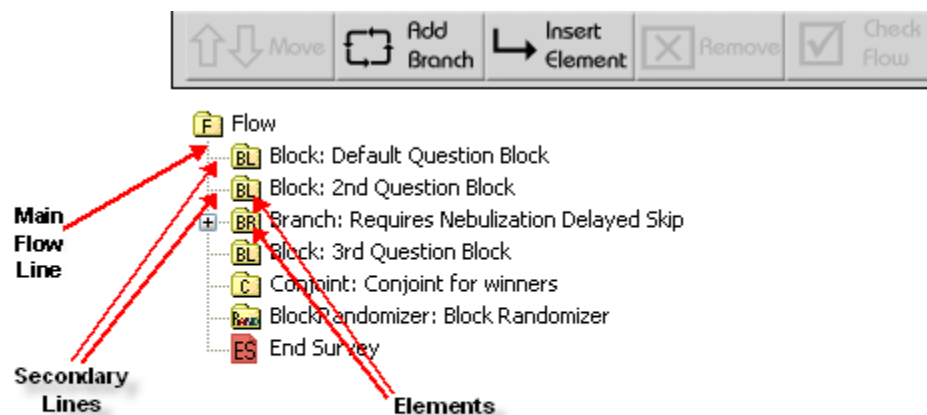
The second box on the "Manage Response Sets" screen allows you to combine response sets. This allows you to view or download multiple response sets together. For example, suppose you had a survey that ran for six months, with the data split into monthly response sets, but you decided that you wanted to view the first 3 months together. You would do this by creating a response set group.

To create a response set group, click the "Add" button and give your response set group a name. The group will appear in the "Existing Groups" box. When you click on the group, a list of all the response sets in your survey will appear in the "Response Sets in Group" box on the right, each with a checkbox next to it. Check the response sets you want to include in the group and close the window.

Survey Flow Tab:

This tab contains tools for customizing the way a survey is presented to the respondents via complex branching and randomization. These tools are completely behind-the-scenes; survey respondents do not see any of the survey flow elements when they are taking the survey.

You'll see a flow-chart at the bottom of the page. This is a visualization of the way the survey "flows." The survey will follow the main flow line on the left from top to bottom. The lines that branch out to the right of that line are secondary lines that the survey will follow as it moves down the main line. Each of these secondary lines leads to a folder, called an "element."



A. Working with Blocks and Branches in the survey flow:

There are two *MAIN* types of elements that you can insert into your survey—"Blocks" (question blocks), and "Branches." These two elements each function differently in the survey flow.

1. Blocks: Creating a question block in the Edit Questions screen doesn't automatically include that block in your survey. For the block to be included in your survey, it must be inserted into the survey flow. Once a block is inserted, it will appear in the survey flow as an element on its own secondary line (see "2nd Question Block" in the graphic above). For the survey in the graphic above, respondents will see the questions from the Default Question Block, and then those from the 2nd Question Block.

To insert a Block into the survey flow, click on the button "Insert Element" and choose the Block to insert. Choose whether to place it in a Branch or in the Main Flow, and specify the location in that Branch or in the Main Flow.

2. Branches: Branches function differently than Blocks. A Branch acts as a filter which, based on answers to previous questions or other information, directs certain people to an element of a survey that others don't arrive at. Setting up a branch requires three steps:
 - i. First, create your branch by clicking the button "Add Branch." Enter a name to describe your branch, choose whether to place it in the Main Flow of the survey or within another branch (yes, you can branch within a branch), and then choose the location within that branch or Main Flow.
 - ii. Second, you must insert into your branch the element you want to associate with it. This can be a Block, but can also be a less common element such as a conjoint, block randomizer, embedded data, or end survey. If it is a Block, you are setting the survey so that only people who come into the branch will be asked the questions in this block. If it is an end survey, people who enter this branch will be shown an end survey message and their survey will be closed. To insert the desired element into the branch:
 1. Click the "Insert Element" button.
 2. Choose the element you wish to insert into this branch from the first dropdown list.
 3. Choose the branch from the second dropdown list.
 4. Choose the location within the branch for the element to be inserted.
 - iii. Third, you must assign the logic to the branch that will tell the system which survey respondents should be routed to it. Without completing this step, the branch will be inactive, and no survey respondents will enter into it.

The process of creating branch logic is different for the first clause and subsequent clauses. **To assign the first clause of branch logic:**

1. Click on the branch name in the survey flow diagram. The folder icon for the branch will turn blue, and a box with the words "Branch Logic" will appear to the right of the diagram.
2. Click "Add" on the Branch Logic box. A window will pop up with several dropdown menus.
3. Choose "IF" from the "Location" dropdown menu (it will be the only option available on the first clause you create).
4. The "Branch Relation" dropdown menu will not function on this first clause. In the "Branch Type" menu, choose the type of reference this branch logic will function with. Will it reference a question response to decide whether or not a respondent will enter the branch? It can also reference other data

sources, such as embedded data, a conjoint, or quota. The logical process for each of these will be the same as it is for a question response.

- Now that you have defined the location and the branch type, you will begin to write your clause, which looks like this:

The screenshot shows a 'Conditions:' section with three input fields. The first field is labeled 'If' and contains the text 'Question - What is highest level of education that you h'. The second field is labeled 'Choice - Post college graduate: Choice'. The third field is labeled 'Is' and contains the text 'Selected'. Each field has a dropdown arrow on its right side.

These are positive conditions you will set here. In other words, this clause will set the criteria for the people who enter the branch, not for those who don't—remember that as a default people will NOT enter the branch.

- For the first box, choose the specific question you'd like the logic to reference.
- For the second box, choose the choice for that question that you want the logic to reference.
- For the third box, choose the type of response to that question choice that you want to reference. In the example above (a multiple choice question), the choice "Post college graduate" must be selected for the person to enter the branch (with this question, I also could have chosen "not selected," "displayed," or "not displayed"). The options available to you in this box differ between question types. For example, if the question referenced in the first box is an open-ended question, the third box will contain different options for you to select than if the question referenced is a matrix table.
- Your clause should now be a coherent piece of logic. The example clause above reads like this: **If** the question "What is the highest level of education that you have received?", answer choice "Post College Graduate" is selected, **then** bring that respondent into this branch.
- Click "Save Branch Logic". The logic will appear in the Branch Logic box next to the survey flow.

iv. **To assign additional clauses of branch logic:**

1. The process you use to assign a second (and third, fourth, etc.) clause of logic will be slightly different than the process for the first clause.

The image shows a 'Branch Logic' configuration window. On the left, there are three dropdown menus: 'Location:', 'Branch Relation:', and 'Branch Type:'. The 'Location:' dropdown is set to 'IF'. The 'Branch Relation:' dropdown is set to 'AND'. The 'Branch Logic' panel on the right contains a list of clauses. The first clause is under a red heading 'BRANCH IF'. The second clause is under an 'AND' heading. The third clause is under a red heading 'OR IF'. The fourth clause is under an 'AND' heading. Red arrows point from the 'IF' and 'AND' selections in the 'Location' and 'Branch Relation' boxes to the corresponding headings in the 'Branch Logic' panel.

2. The graphic above shows a Branch Logic box with multiple clauses. The first difference in adding a second clause is that this time the "Location" box becomes relevant. This box actually lets you decide where this new clause will fit into the chain of logical clauses. For the first clause, the only choice available was "IF". For the second clause, you have two choices: "IF" and "New Or If". Choosing "New Or If" will create a separate section for this clause (the red "OR IF" in the image above).

For the third and fourth clauses (and so on), the "Location" box will be populated with the names of the large headings. For example, when creating a new clause for the branch in the image above, the "Location" box would have three choices: "IF", "OR IF", and "New Or If". By choosing "IF", my new clause will be inserted as the last clause under the red "BRANCH IF" heading. If I choose "OR IF", the clause will be inserted in the next section, as the last clause under the "OR IF" heading. If I choose "New Or If", the clause will be inserted under a new "OR IF" heading, a third section.

3. The "Branch Relation" box will have two choices: "AND" and "OR". Your clause will appear underneath the larger "BRANCH IF" or "OR IF" heading you chose, with the "AND" or "OR" as its own header. For an example, see the image above.

Note: Beneath the larger "BRANCH IF" and "OR IF" headings, the "AND" has the higher priority (i.e. with a chain of clauses such as 1 AND 2 AND 3 OR 4, the system will read it as (1 AND 2

AND 3) (OR 4)—meaning IF 1 AND 2 AND 3 are all fulfilled, OR if 4 is fulfilled, then the respondent will be branched.

If you're still having trouble understanding this, think back to fourth grade math. If this were a mathematical clause, the AND would be a multiplication sign and the OR would be a plus sign.
 $1+2X3+4$ is grouped like this: $1+(2X3)+4$.

B. Working with Embedded Data in the Survey Flow:

1. Embedded Data is "behind the scenes" data associated with a respondent. Generally, embedded data will be uploaded with a mailing list (panel). Once this data is uploaded, you can then perform operations such as skipping and branching with the data as your variable. For example, you could upload the person's home state as an embedded data field in your mailing list (panel). You can choose to make your branch logic "Specific to an Embedded Data Field" rather than "Specific to a Question Response". Once you have set the logic to reference an embedded data field, you will have to enter (manually, so make sure you enter it right) the name of the embedded data field (tag), the name of the variable you want to reference, and then choose from the dropdown the condition for the variable (is equal to, is not equal to, etc.). Example: "If Embedded Data Tag: Home State Is Equal to Colorado."
2. Entering Branch Logic specific to an embedded data field does not require any embedded data element to be included in the survey flow. However, there are cases in which you may want to insert embedded data into the survey flow:
 - i. First: Embedded data is not recorded in the survey results, and is therefore not included when you download your survey data. This isn't a problem, since you're the one who supplied the embedded data in the first place. You should already know it. However, if you would like to have the embedded data included in your data download, insert it into the survey flow. It doesn't matter where you insert it.
 - ii. Second: If you want to *create* embedded data from the responses a respondent enters in this survey, you will need to insert the embedded data into the survey flow.
3. To insert the embedded data into the survey flow, you must create a folder in the flow for embedded data, and then assign the proper piece of embedded data to the folder. To create the folder, use the "Insert Element" button, choose embedded data as the element to insert, and then choose a name to describe the embedded data folder. Choose any name; this element you are inserting is an empty folder, like a new Branch, and this name is only the name of the folder on the survey flow, not the name of the embedded data you want to reference.

Once you have created the Embedded Data folder in the survey flow, you must specify the embedded data field you want to reference. Click on the name of the embedded data folder (the folder should turn blue), and a box titled "Embedded Data" will appear to the right of the flow. Click the "Add" button in that box to open a dialogue window. There are two types of embedded data that you can add to your folder:

- i. User Data Field: Choose this type of embedded data if you to add a piece of embedded data you uploaded with your folder. Type the name of that embedded data field in the white box, and click "OK."
- ii. Custom: If you wish to create an embedded data field to be added to those who enter this folder in the survey flow, choose this option. You must name the field and value. The value you type here will be what appears in your survey results in the column for this embedded data field.

C. Working with the Block Randomizer in the Survey Flow

- a. The block randomizer allows you to randomize the presentation of blocks in your survey. You must have previously created the blocks to be randomized before using the block randomizer.
- b. To begin working with the Block Randomizer, insert the element "Block Randomizer" into the survey flow. Do this by clicking on the "Insert Element" button, choosing "Block Randomizer," and then choosing the part of the survey flow you wish to place it in. The randomized blocks will appear in the survey in the place where you insert the block randomizer.
- c. Once the Block Randomizer is in the survey flow, click on the name of the folder. The folder will turn blue, and a box titled "Block Randomizer" will appear to the right side of your screen.
- d. Click "Add" and choose, one at a time, which blocks to put into the randomizer. Randomized blocks should not appear anywhere else in the survey flow.
- e. Once you have added all the blocks to be randomized into the Block Randomizer, make sure the number in the dropdown reflects the number of blocks you want the respondents to see. You may set it to show all of the blocks in the randomizer, or a subset of those blocks (i.e., if you have 5 blocks in the randomizer, and you want each respondent to randomly see two of those blocks, put a "2" in the box).

Distribute Survey

This tab takes you to a screen with four distribution options, accessible through the secondary row of tabs. Your survey must be activated before you can access this distribution tab. Except for testing purposes, you should not send your survey until you have finished building it.

A. **Survey Link:**

This tab provides a generic link for your survey distribution. This link may be pasted into an email or posted on a web page. Because the link is generic (meaning every survey respondent uses the exact same link to access the survey), respondents are anonymous. The "Prevent Ballot Box Stuffing" option on the "Survey Options" page will, when selected, place a cookie on each respondent's computer that will disallow them from taking the survey twice. The "Customizable Survey Link" at the bottom of the page allows you to create a cleaner looking link for pasting on a web page. Enter the text you want the link to consist of in the "Custom Text" box, and then click "Generate." The box labeled "Copy and Paste" will then be populated with the link. When you copy this link into the HTML code for a web page, the link will appear on the web page as your custom text.

B. **Qualtrics Survey Mailer:**

This is the most popular method of survey distribution. Unlike the generic link available in the "Survey Link" tab, the link the mailer sends to the panel members is unique—each person gets a slightly different link. This means that the mailer can track each panel member's survey progress. If the person's computer crashes in the middle of the survey, they can return to the survey later and pick up where they left off. You may send a reminder email to all panel members who haven't completed the survey. When a panel member completes a survey, their link becomes inactive. They cannot take the survey again, or forward the link to anyone else. (You may actually change the settings to allow respondents to forward the link to others. See the "Advanced Options" section for help on how to do this).

To send your survey using the Qualtrics Mailer, you will first need to upload that panel into the system in the "Library" > "Panel Library" tab. You will also need to create an invitation message in the "Library" > "Message Library" tab. Once your panel and your message are in the library, come back to the Qualtrics Survey Mailer tab.

1. **Send Survey to a Panel:**

Click on the "Send Survey to a Panel" button. A new window will pop up on your screen. Enter the information about the email (Your name, the email address you want the survey to come from, and the email subject). Enter the time you want the email to be sent (note that the time is Mountain Standard Time, and that you must enter the time in 24-hour format). The default time is automatically set one hour from the time the window opens. Choose the panel and message from your library, then click "Schedule."

- i. **Advanced Options:** Four advanced options are available in this section:
 - a. **Email expires in X days:** You can set the email to expire in one of the preset amounts of days. This will deactivate the survey link in each email. Your survey will still be active, but the links sent in this mailing will expire, and those people will no longer have access to the survey.

- b. **Send test email now:** Checking this box and entering an email address will send a test immediately upon the mailing being scheduled. For example, if you have set your mailing to go out to your panel in 3 hours, when you click the "schedule" button to finalize the mailing, a test email will be sent immediately to the address you entered. This allows you to check the email and cancel the mailing if you detect any problems.
- c. **Survey Link Type:** There are three options in this dropdown box:
 - 1. Individual Link: This is the default setting for the mailer. Each person in your panel will get a unique link that can only be completed once. You will be able to connect survey responses to panel members when looking at your data.
 - 2. Multiple Completes Per Link: This is a "snowball email." This setting will allow panel members to forward the survey to others. The system will track how many times a survey is completed for each link. You may analyze at the end how many of your completed surveys came from each panel member's link.
 - 3. Anonymous Link: This option functions like an Individual Link with one exception: you will not be able to connect survey responses to panel members when looking at your data.
- d. **Change the Target Response Set:** You can assign all of the survey data in this mailing to a certain response set.

2. **Send Survey to a Sample:**

The "Send Survey to a Sample" button has the exact same functionality as the "Send Survey to a Panel" button, except you are sending the survey to a portion of the panel that you have created in your panel library.

3. **Send Survey to an Individual:**

This button uses the same screen as the "Send Survey to" "a Panel" and "a Sample" buttons. Use this button to send your survey to one individual.

C. **HTML Popup Survey:**

This tab gives you an HTML code to paste a website's HTML. Visitors to the website will have the survey presented to them in a popup window. You may modify the size of the window using the "Width" and "Height" boxes on the bottom of this page. Make sure you click "Update" before copying the code.

D. **Embedded HTML Survey:**

This option is similar to the HTML Popup Survey option. This tab gives you an HTML code to paste into a website's HTML. The survey will appear as an embedded part of the webpage. You may modify the size of the window using the "Width" and "Height" boxes on the bottom of this page. Make sure you click "Update" before copying the code.

View Results

The first function available on this page is the survey statistics box, which will inform you how many surveys have been started and how many have been completed. Clicking on the box with the red check-mark will show you the following real-time data: survey durations, survey start times, survey start dates, drop out rates, and survey completion percent.

The second function is the set of drop-down menus on the right. The first box allows you to choose the survey in your account that you wish to view the results for.

The second box allows you to choose the response set you wish to view in that survey, if you have created additional response sets. All of the tabs on this page, with the exception of the "subgroups" tab, function only within the response set you have selected in the dropdown menu. For example, the detailed report will only report the results from the response set selected; the dashboard will only load data from the response set selected, the "advanced analysis" tab will only run cross-tabs for the response set selected, the "edit results" tab will only show results from the response set selected, the "Download Results" tab will only download results from the response set selected, etc. Make sure that you have not accidentally selected a response set unintentionally.

The third box allows you to choose a subgroup. The subgroup works the same way as a response set. For further instructions on using subgroups, see the section on the "Subgroups" tab, below.

The "View Results" tab has a row of seven secondary tabs:

A. **Detailed Report:**

This tab brings up a full report of your survey results. Every question in your survey is represented in this report. Each question's data can be viewed in a table or a graph format. If the "tabular" tab at the top of the report is selected, only the questions will appear in your report, and you may access the tables and charts through the buttons to the right of the question. If the "Comprehensive" tab is selected, the tables and charts will automatically appear beneath the question.

The "options" tab allows you to change the chart between a bar chart, a pie chart, and a line graph. You may also recode your variables on this page.

B. **Dashboard:**

The Dashboard generates flash-based horizontal tables and vertical charts for every question in the survey.

By clicking on the "Table Formats" and "Chart Formats" tabs at the top of the column containing the question names, you may modify the colors of the header (the first color changes the top of the gradient, the second color changes the bottom of the gradient), the row colors, the border color, the font size, the font, the font color, and the text alignment. You may also create and save your unique settings as a preset.

Other functions in the Dashboard include:

1. **Drill Down:**

This button allows you to see a cross-section one question across all other questions in the survey. For example, if you choose to drill down by a

question asking for gender, every other question in the survey will show how many men and how many women gave each response.

2. **Manage Embedded Data:**

This button allows you to import embedded data into the dashboard. Once your embedded data is imported, you can use that data to drill down.

3. **Download Image:**

The computer disk icon in the top left corner of each graph allows you to download the chart or graph for insertion into another program. Click on the computer disk icon, specify whether or not you want the question text to be included in the image, and click "image."

4. **Options (table only):**

This button allows you to change the text in any part of the table. You can change the headers (choice, count, percent) in the first row of the table, or the question choices in the first column of the table.

5. **Bar, #, % (table only):**

These buttons are on/off togglers that include or omit the bar graph, count, and percent columns.

6. **% (chart only):**

This button changes the data the chart represents from *number of* respondents who chose an answer to percentage of respondents who chose an answer. Clicking on the button again returns the graph to its original setting.

7. **Column, Bar, Line, Plot, Pie (Dropdown, chart only):**

You can switch the chart between these different types of graphs using this dropdown.

8. **+ , -:**

The plus and minus buttons change the size of the window containing your chart or graph.

C. **Advanced Analysis:**

Generate cross tabulations here. Click "add" to create a new cross-tab, or if you have already created one, you may view, print, update, or delete the cross-tab using the icons on its right.

A cross-tab is a graph that allows you to compare the answer choices for two questions. The answer choices for the first question appear on the vertical axis of the graph, and the answer choices for the second question appear on the horizontal axis. The middle space is used to show correlations between the answer choices.

D. **Report Writer:**

This tab allows you to create a report similar to the Detailed Report in the first tab. The difference is that the report writer allows you to choose which questions to include in the report, what order they appear in, and also allows you to insert text, graphics, cross-tabs, and survey questions the way respondents saw them. It also provides you with a link that allows you to access the report without logging in to your Qualtrics account.

E. **Subgroups:**

Subgroups allow you to view only the results that meet certain specifications you define. To create a new subgroup, click on the "create" button and name the subgroup. Once the subgroup has been created, select it in the dropdown menu. When your subgroup appears in the bar at the bottom of your screen, click "add." You will add logic to the subgroup in a process identical to creating branch logic in

the survey flow. Those who meet the criteria in your logic will be included in this subgroup. Then, when the subgroup is selected in the dropdown box at the top, the tabs on the "View Results" page will show only the data for respondents that meet the subgroup's criteria.

F. **Edit Results:**

This tab allows you to look at individual survey respondents. It provides you with the information "Response ID," "Respondent," "Start Time," and "Duration." This page is mostly used for deleting unnecessary respondents, such as survey previews you have done while testing your survey. Surveys completed using the "Survey Preview" button that appears on various pages in the system will have "SURVEY PREVIEW" displayed in the "Respondent" column. To delete a respondent, check the box on the respondent's line, and click "Delete." Note that deleted respondents cannot be recovered.

You may also import survey data into your results for this survey on this page. Data imported here will appear in the "Edit Results" box, and will also appear in your data download.

G. **Download Data:**

This page contains instructions for downloading data.

The first step is to select the survey questions you want to download. The first choice in that box is "All Questions."

The second step is to choose to download the answers as "Values" or "Labels." Values are number representations of survey data, and labels are the English language representations of survey data. To use a yes-no question as an example, a Values download would download the numbers 1 and 2 for yes and no, while a Labels download would give you the actual words "yes" and "no."

The third step is to specify whether or not you want to use export tags in your download. As a default, the system will tag your survey questions as "Q1, Q2, Q3, etc." If you have changed these tags on the "Preview and Label" screen when building or editing your questions, you may select "Yes" here to use those export tags instead of the defaults in your download.

The fourth step is to choose the download format. Click on your choice, and you will be asked whether or not you want to open or save the document.

Library

The Library stores surveys, questions, graphics, messages, and panels. Most Qualtrics accounts have a library included which contains numerous survey and question templates. These templates can be copied into your account for your use and modification. You may also copy surveys or questions into your library for future reference.

The graphics and message libraries work in similar ways. Both are originally empty. You may take graphics from the internet or from your hard drive and upload them into the graphics library. You may create categories for your graphics to keep them clustered. Message libraries allow you to create messages for use in survey invitations, reminder emails, survey endings, etc. Make sure you put the messages you create in the proper category. The functions requiring messages will only access messages in the category related to that function. For example, you can't send a survey invitation message in a reminder email.

The Panel Library is for uploading and managing mailing lists. This library is originally empty. To upload a mailing list, click the button labeled "Create a New Panel." Name the panel, then click "Create." The empty panel will appear below, with 6 or 7 buttons accompanying it:

- A. **Delete:**
This button will delete the Panel from your library.
- B. **Options:**
This button lets you change the name of your panel.
- C. **Distribute:**
This button will take you to the tab Distribute Survey > Qualtrics Survey Mailer.
- D. **Manage ED:**
This button brings up a window that shows you all the embedded data you imported with this mailing list. Select different fields using the dropdown list, and alter the variable names or value coding by clicking on the item you wish to alter. You may add another variable using the "Actions" dropdown box and choosing "add another option."
- E. **Import Survey:**
This button allows you to import responses from a survey into your system.
- F. **Import:**
This button takes you through the process of uploading your mailing list from a CSV file.

Clicking on the "Import" button opens a dialogue box. Click "Browse" to find your CSV file. Specify whether or not you have a row with column names at the top of the file to be uploaded, and click "Upload."

You must set a few parameters for your mailing list before the import can be completed. Using the dropdown lists to specify which column goes with the data listed on the left of the boxes. If you have an external data reference, make sure the proper column is selected for that data. If you have columns with additional information that you want to include in your mailing list (such as home state, gender, or anything else) you may include it as embedded data. This data will be accessible in survey functions such as branching and text piping.

Once your columns are properly assigned, click "Import." The panel will appear on the Panel Library screen.

G. **Add:**

Use this button to manually add individuals to your mailing list. You may add external data references or embedded data manually.