



**University of Kentucky**  
College of Agriculture,  
Food and Environment  
*Cooperative Extension Service*

# **Qualtrics**

## **Part 2: Getting Started**

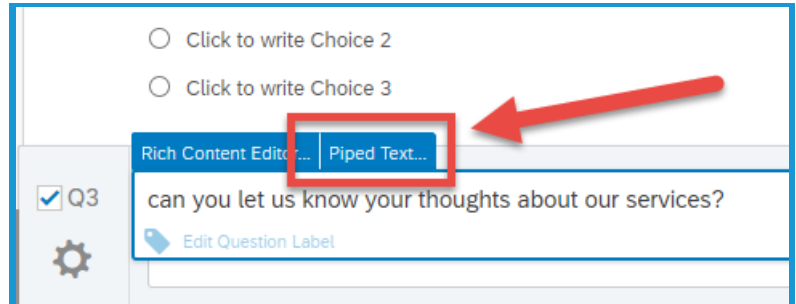
**Any questions or training request:**  
**[chad.jennings@uky.edu](mailto:chad.jennings@uky.edu)**

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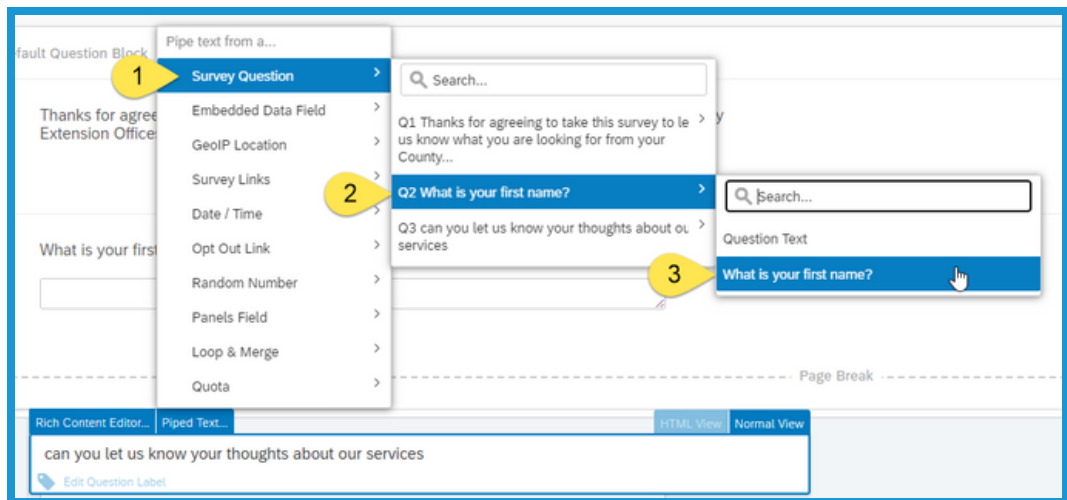
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## Section 1: Piped Text

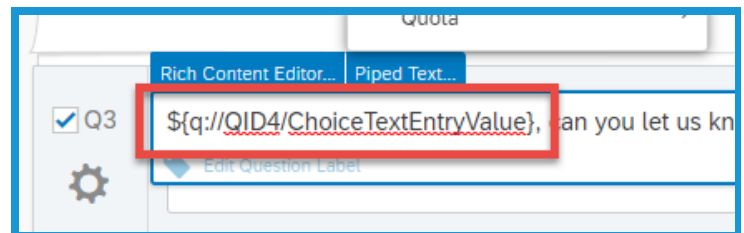
1. Click in the text of the question where you want to add the piped text. Then click the **Piped Text** button.



2. Place your mouse over **Survey Question (1)**, place your mouse over the needed question (2), and then click on the actual question in the third menu screen (3).

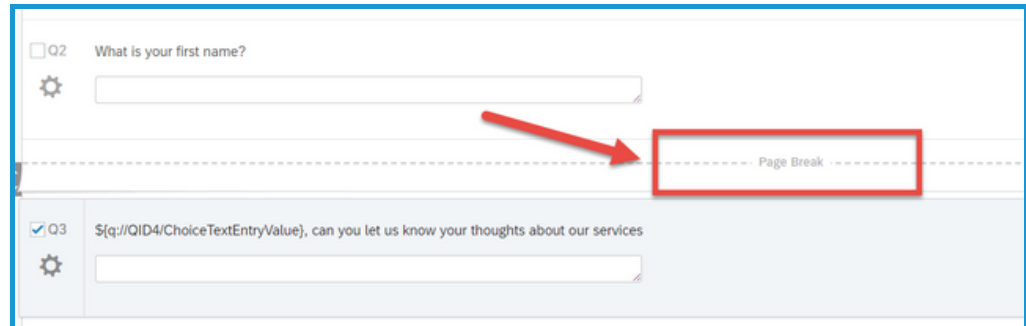


3. If the Piped Text was done correctly, you will see the following formula in the needed location.



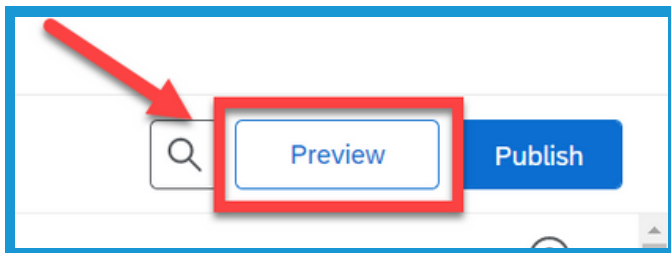
## Section 1: Piped Text

4. Make sure a **Page Break** is placed before the question using the Piped Text. If this is not done, the text cannot populate. (**See Part 1, Section 5, page 18 on how to add a Page Break.**)



A screenshot of the Qualtrics question editor interface. It shows two questions. The first question, labeled 'Q2', is 'What is your first name?' and has a text input field. The second question, labeled 'Q3', is 'S(q://QID4/ChoiceTextEntryValue), can you let us know your thoughts about our services' and also has a text input field. A red arrow points from the first question's input field to a 'Page Break' button located between the two questions. The 'Page Break' button is highlighted with a red rectangular box.

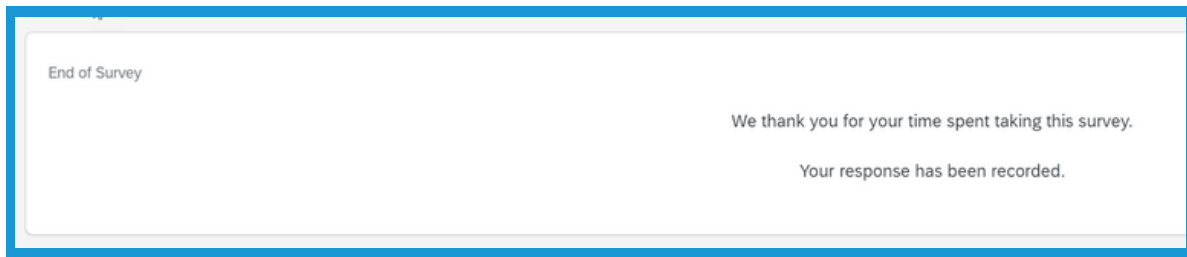
5. Click **Preview** in the upper right corner to test your survey to ensure that the Piped Text is working correctly.



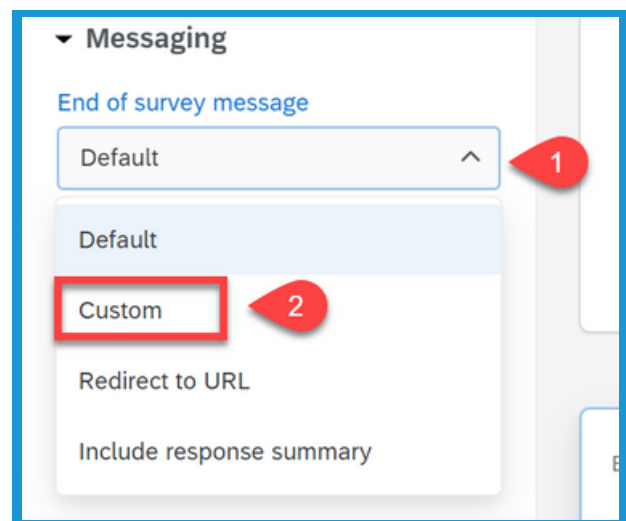
A screenshot of the survey preview. It shows the University of Kentucky logo at the top. Below the logo, there is a text input field. A red arrow points to the text 'Chad, can you let us know your thoughts' which is displayed in the input field. This text is highlighted with a red rectangular box, indicating that the piped text is working correctly.

## Section 2: End of Survey Message

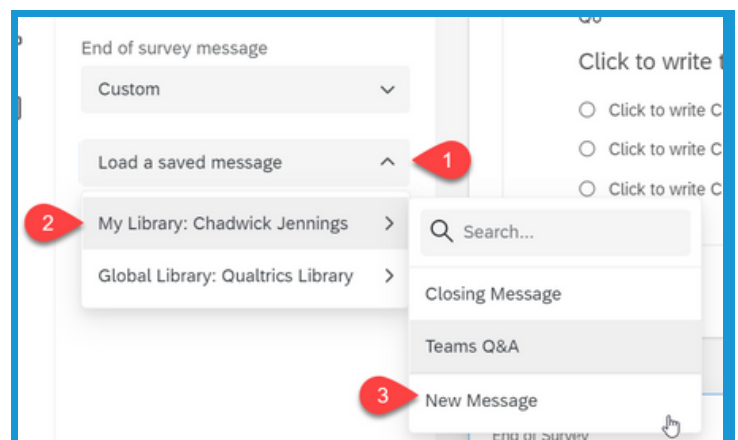
1. At the bottom of the survey click the box titled **End of Survey**.  
You will also see a preview of the default end of survey message.



2. In the upper left corner of the screen, select the **End of survey message** dropdown menu (1).  
**Select Custom (2)** from the list of options.

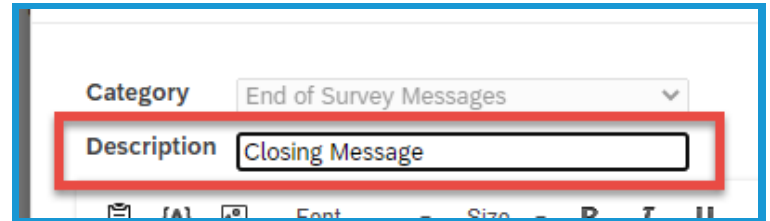


3. Click the new **dropdown menu that appears (1)**. Place your mouse over **My Library (2)**. You can select an already created message in the new window that appears, or click **New Message (3)** to draft a new closing.



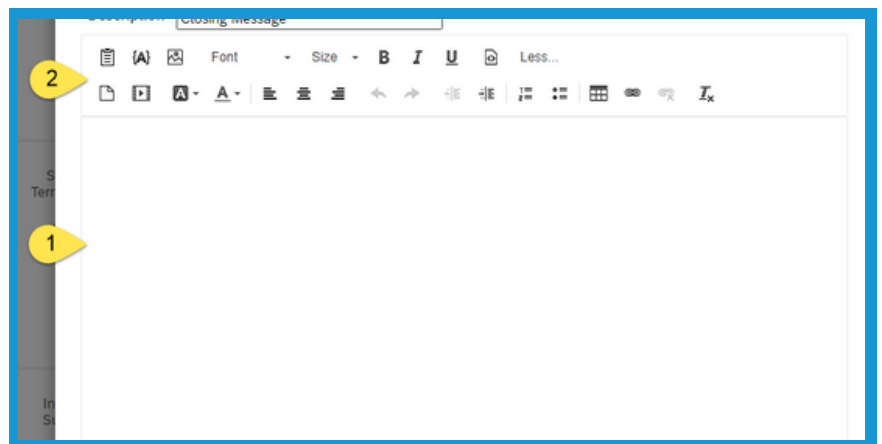
## Section 2: End of Survey Message

4. Give your message a name in the **Description** field. This is how you will be able to locate the note in your message library.



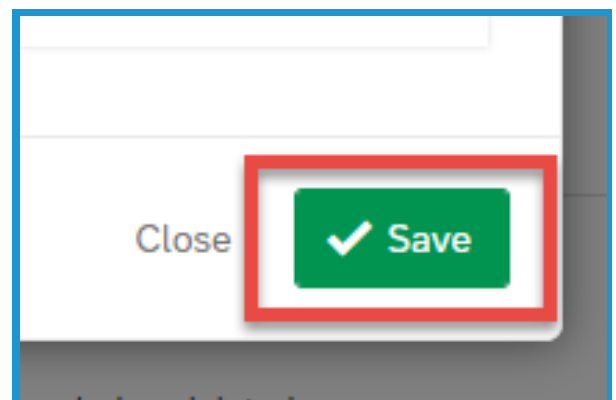
The screenshot shows the 'Category' dropdown menu set to 'End of Survey Messages'. The 'Description' text box contains the text 'Closing Message'. A red rectangle highlights the 'Description' field.

5. Type the message in the body text box (1), and format the message as needed with the toolbox (2).



The screenshot shows the message editor interface. The body text box is labeled with a yellow circle '1'. The formatting toolbox, which includes options for font, size, bold, italic, underline, and more, is labeled with a yellow circle '2'.

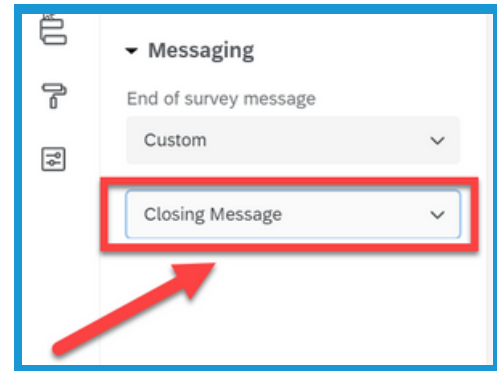
6. Click **Save** in the bottom right corner of the screen when the message is completed. Your new message will now appear at the bottom of your survey builder.



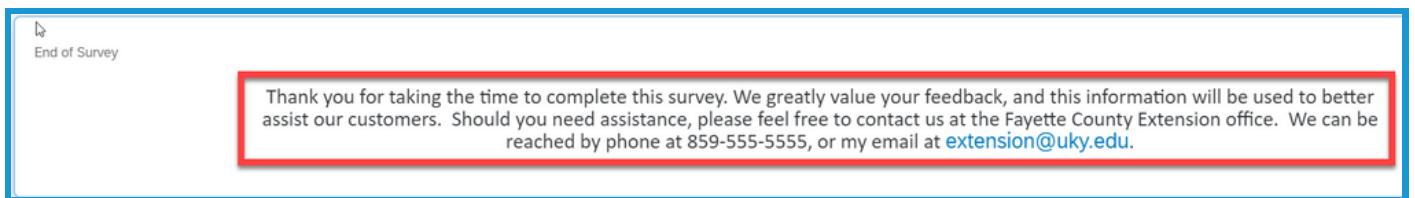
The screenshot shows the bottom right corner of the message editor. There is a 'Close' button and a green 'Save' button with a white checkmark. A red rectangle highlights the 'Save' button.

## Section 2: End of Survey Message

7. Your new message description will appear in the dropdown menu located on the left side of the screen.

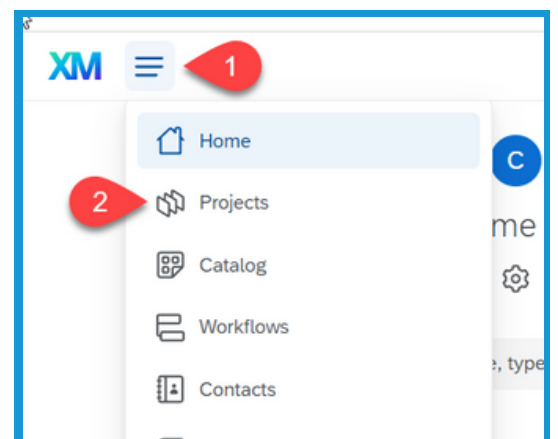


8. You will see the new message displayed in the **End of Survey box** located at the **bottom** of the Survey Builder.



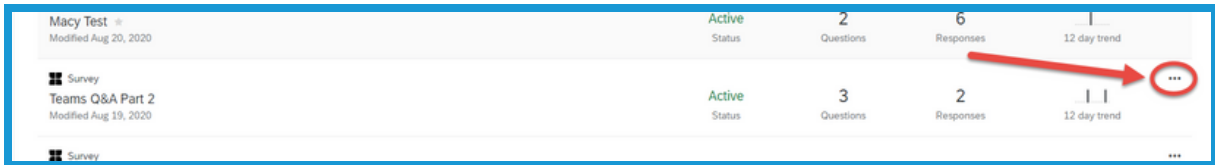
## Section 3: Collaboration

1. On the **Home Page**, select the **pancake icon** in the upper right (1). Then select **Projects** (2).

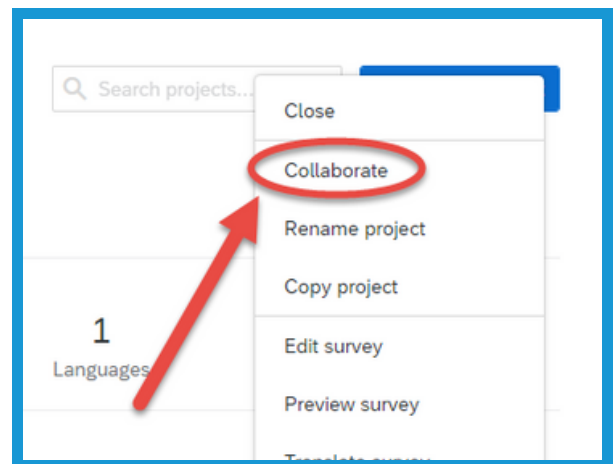


## Section 3: Collaboration

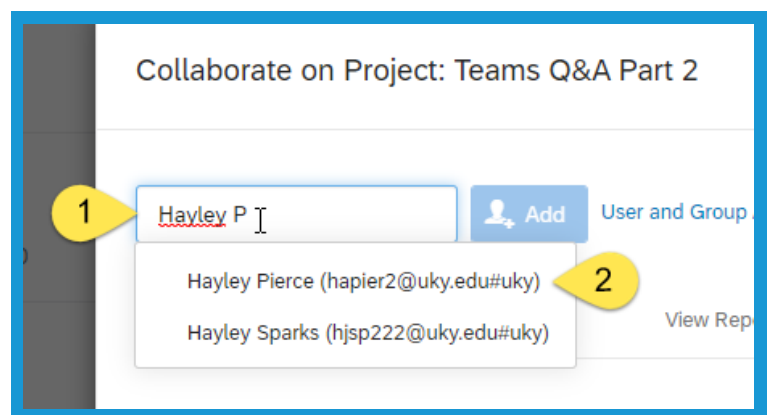
2. On the Project screen, click the **three dots** to the right of the project you want to copy.



3. In the new menu click **Collaborate**.



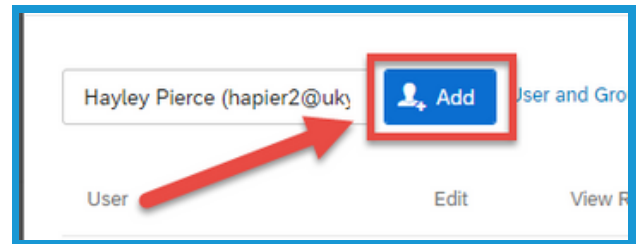
4. Type the name of the user in the name field. When the name auto-populates click on the user.



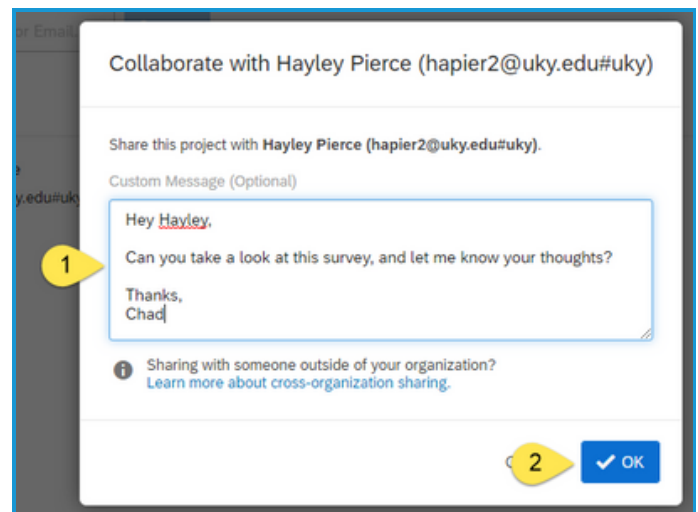


## Section 3: Collaboration

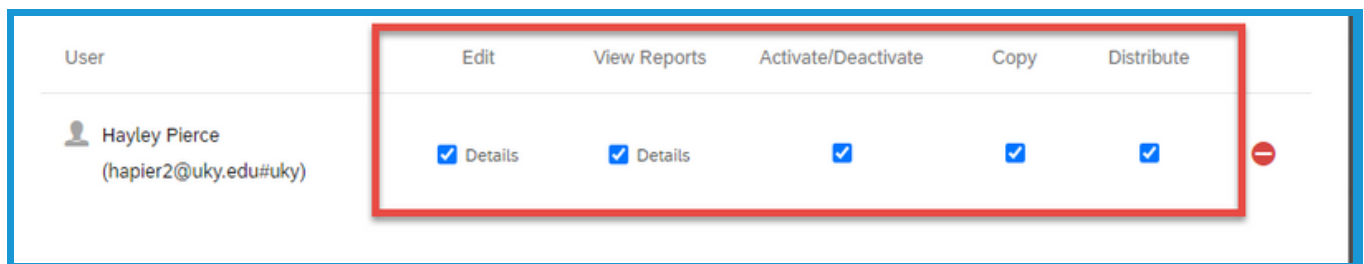
5. Click the **Add** button after finding the user.



6. Type a message to the user in the **Custom Message** field (1). Then click **OK** (2). Typing a message is not required.

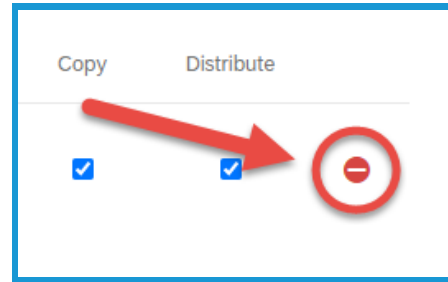


7. Once added you can turn off the user's various abilities in the project by un-checking the various options.

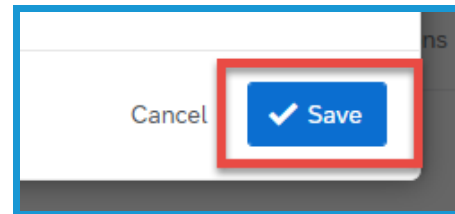


## Section 3: Collaboration

8. Click the minus sign to the far right to remove the user's access to the project.

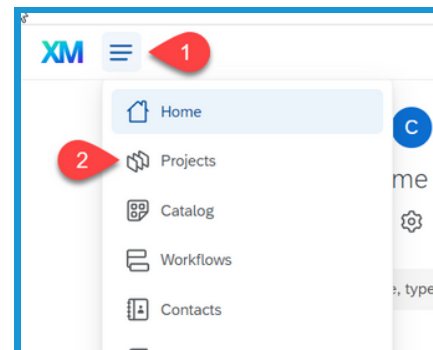


9. Click the **Save** button in the lower right corner to confirm the settings.

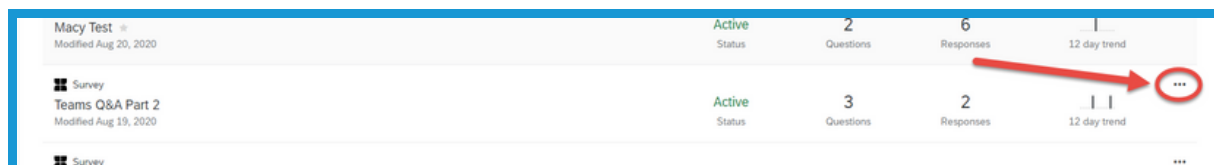


## Section 4: Copying a Survey

1. On the **Home Page**, select the **pancake icon** in the upper right (1). Then select **Projects** (2).

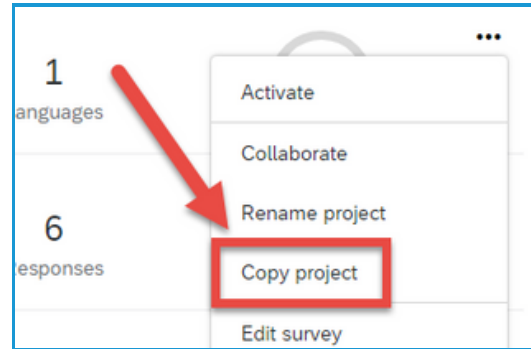


2. On the Project screen, click the **three dots** to the right of the project you want to copy.

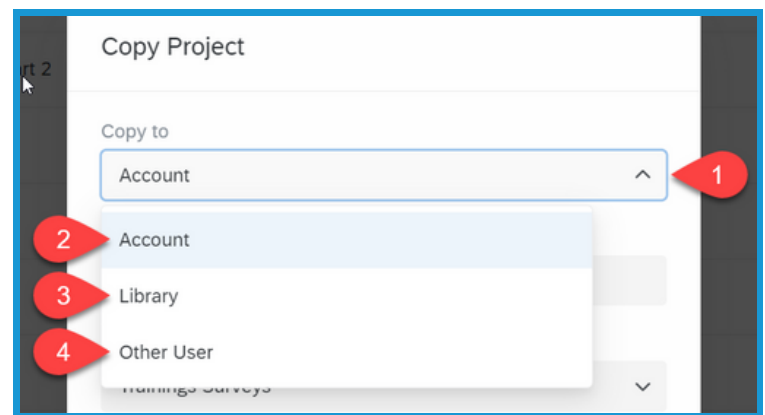


## Section 4: Copying a Survey

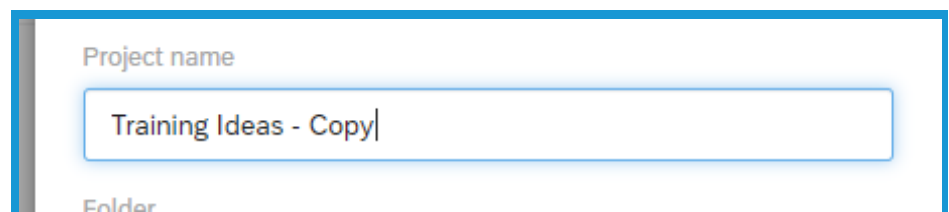
3. Click **Copy project** in the new menu.



4. Click the **Copy to dropdown menu (1)** in the new window. Select **Account (2)** to save the project to your main screen. Select **Library (3)** to save the message to that location. Select **Other User (3)** to send a copy of the survey to another user.



5. Give the copy a name in the **Project Name** field. By Default, the project will share the same name as the source with a "- **Copy**" at the end.

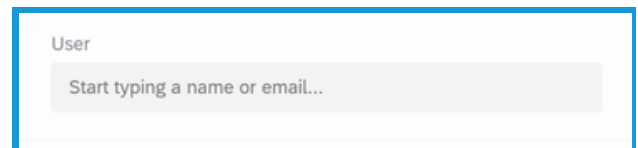


## Section 4: Copying a Survey

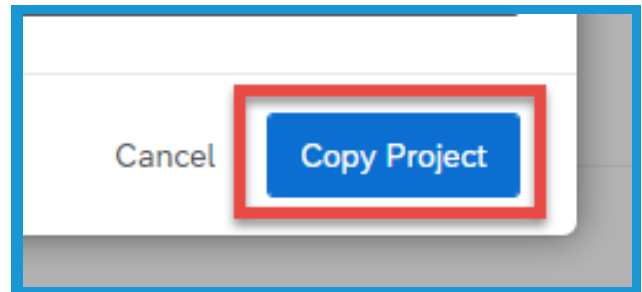
6. If **Account or Library** is selected in **Step 3**, click the **Folder** dropdown menu to choose the location to place the copy. If **Other user** is selected, enter the name of the person you want to send the copy to in the **User** field.

A screenshot of a 'Folder' dropdown menu. The menu is open, showing 'Online' as the selected option. A red arrow points to the dropdown arrow icon on the right side of the menu.

or

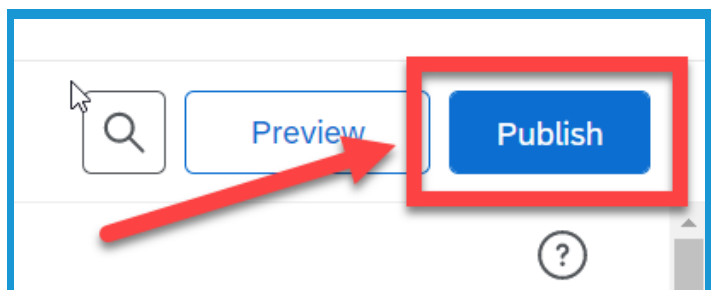
A screenshot of a 'User' input field. The field is empty, with placeholder text 'Start typing a name or email...'. A red arrow points to the input field.

7. Click **Copy Project** in the lower right corner to duplicate the survey.

A screenshot of a dialog box with two buttons: 'Cancel' and 'Copy Project'. The 'Copy Project' button is highlighted with a red rectangular box.

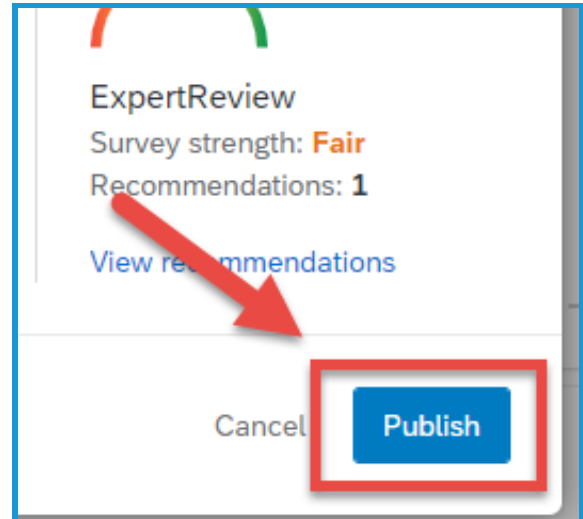
## Section 5a: Distribution - Publishing

1. Click **Publish** in the upper right corner.

A screenshot of a toolbar with three buttons: a search icon, 'Preview', and 'Publish'. The 'Publish' button is highlighted with a red rectangular box. A red arrow points to the 'Publish' button.

## Section 5a: Distribution - Publishing

2. Click **Publish** again in the lower right corner of the new window.

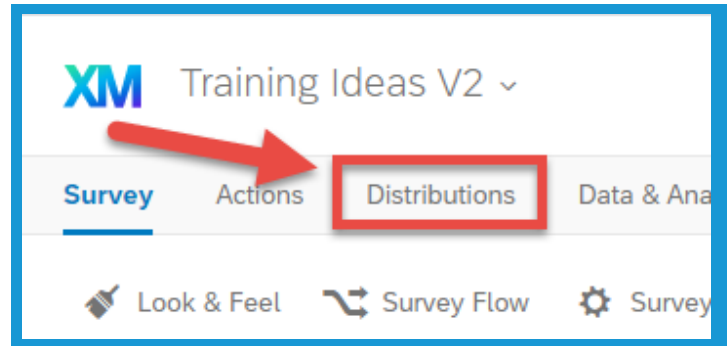


3. A new window will open with a link to your Qualtrics survey. Copy and paste the link into a message of your choosing. If this is a survey that has already been published, this window will not appear. You will need to access the Distribution area of your survey. **(See section 5b)**

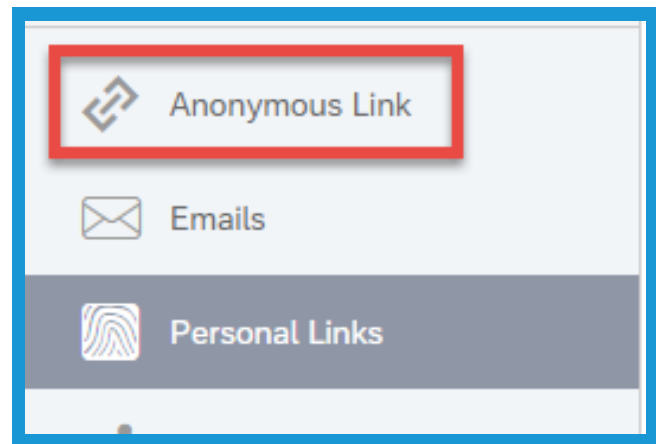


## Section 5b: Distribution - Anonymous Link

1. Click **Distributions** at the top of the survey's edit page.



2. Click **Anonymous Link** on the left side of the screen.

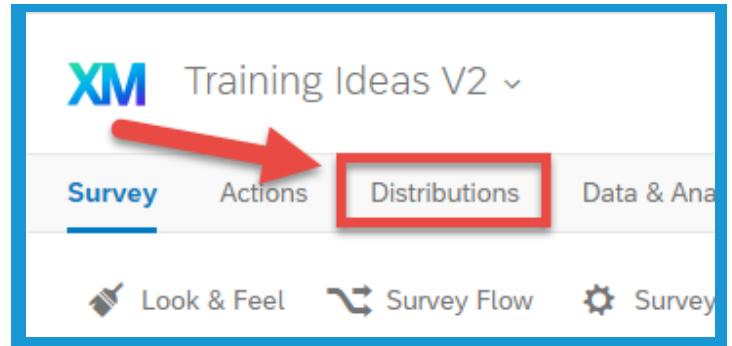


3. The link will appear in the middle of the screen, and can now be copied and pasted into a message of your choosing.

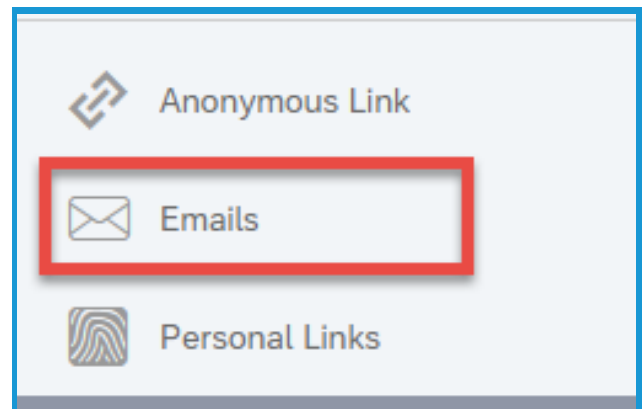


## Section 5c: Distribution - Emails

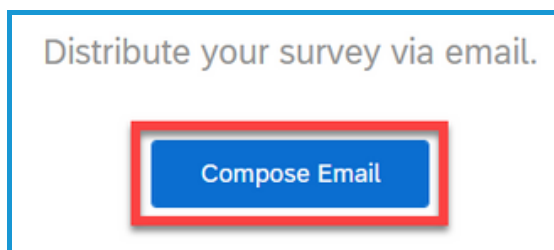
1. Click **Distributions** at the top of the survey's edit page.



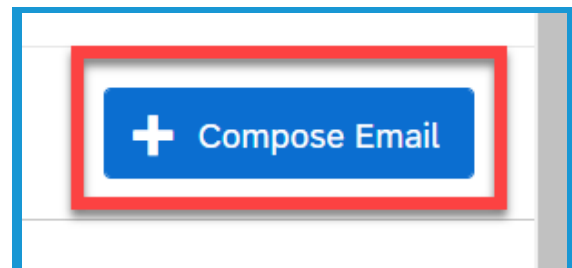
2. Click **Emails** on the left side of the screen.



3. Click **Compose Email** in the middle or the top right corner of the screen.

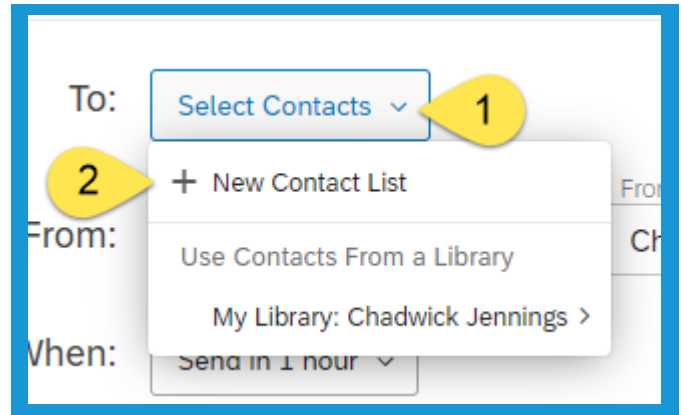


or

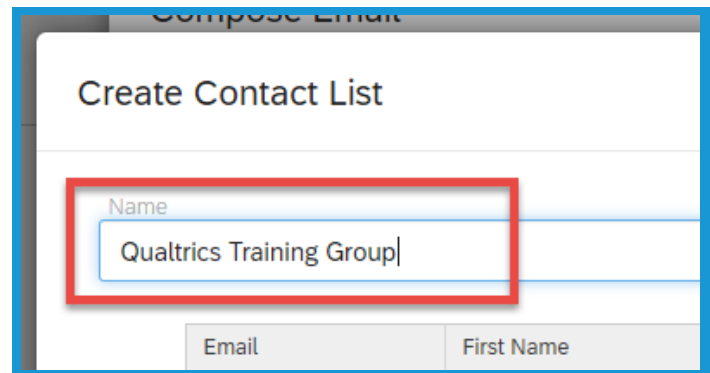


## Section 5c: Distribution - Emails

4. In the **To** field (1) click the drop-down menu, and select **New Contact List** (2).



5. Give your Contact List a **Name** in the field at the top of the screen.



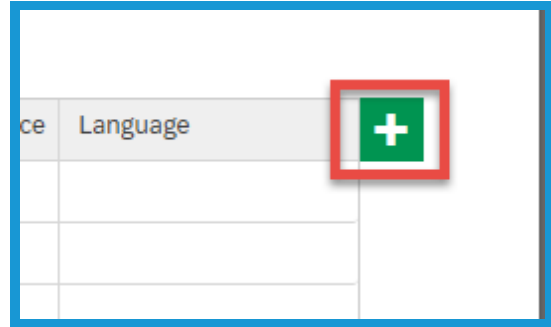
6. You can type in the email address and names into the provided fields. Information can also be copied and pasted from an excel sheet. The only required column is the one containing the user's email.

Email	First Name	Last Name	External Data Reference	Language	
chad.jennings@uky.edu	Chad	Jennings			
steven.garner@uky.edu	Steve	Garner			
rick.hayes@uky.edu	Rick	Hayes			
hayley.pierce@uky.edu	Hayley	Pierce			

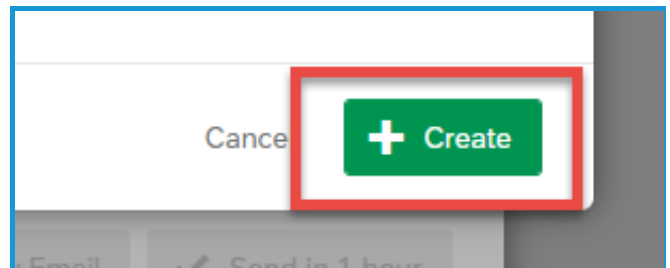


## Section 5c: Distribution - Emails

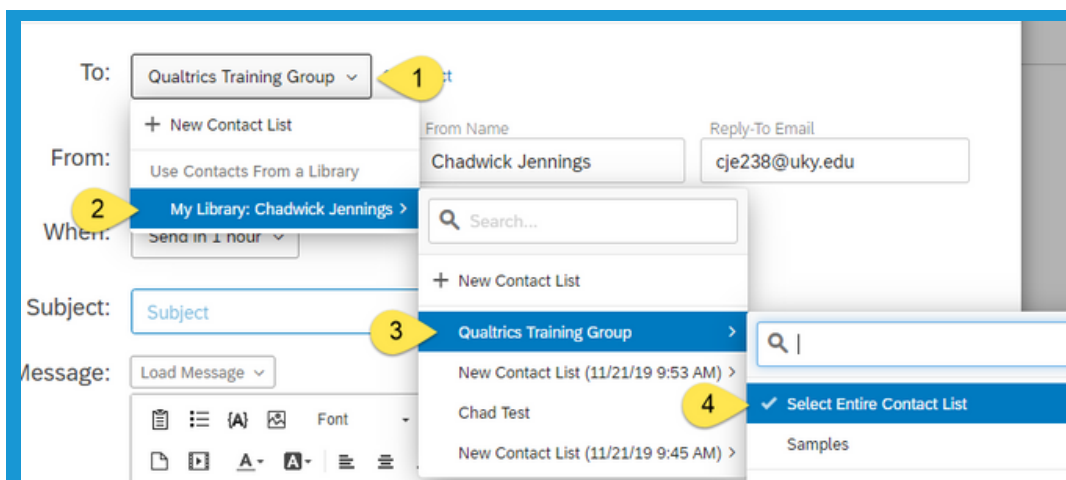
7. Click the **green plus** sign in the upper right to add fields for information that you may want to include.



8. Click **Create** in the lower right to save the new list.



9. Retrieve the new list by clicking on the drop-down menu to the right of the **To** field (1). Place your mouse over **My Library** (2), and then over the **List name** (3). Click **Select Entire Contact List** (4).

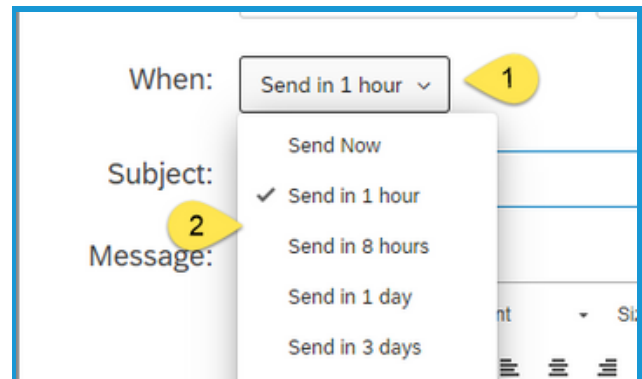


## Section 5c: Distribution - Emails

10. In the From section you can change the **From Address** (1), **From Name** (2), and **Reply to Email** address (3) if you prefer to have that information look different from what is automatically generated.



11. Under **When**, click the drop-down menu. You can then choose when the email will be sent to the users.

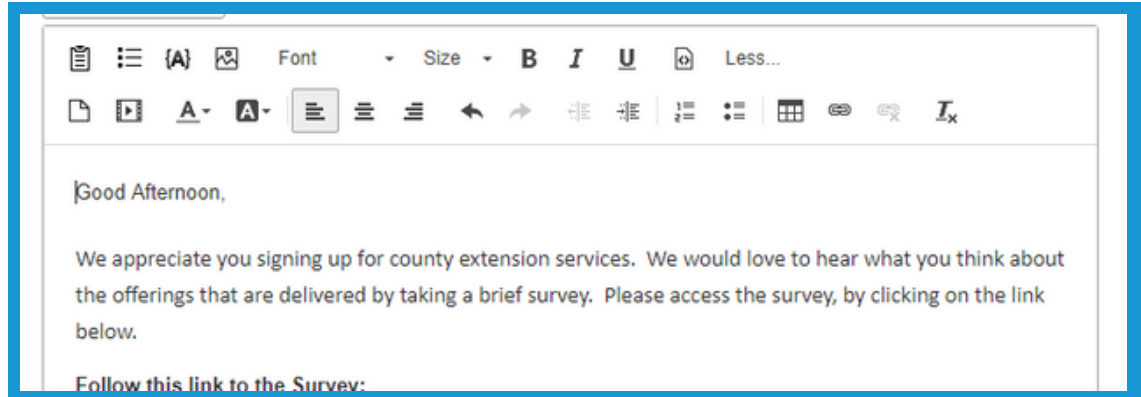


12. In the **Subject Field**, give your email a subject.

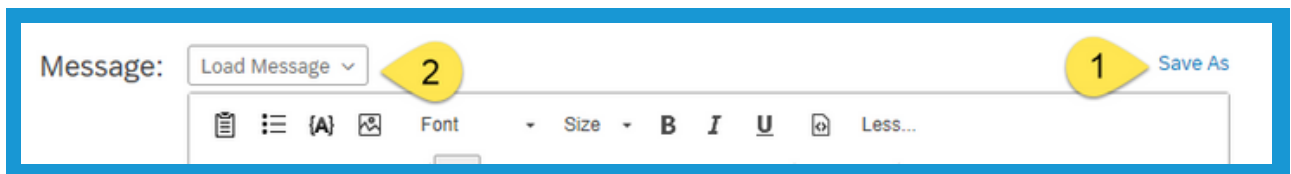


## Section 5c: Distribution - Emails

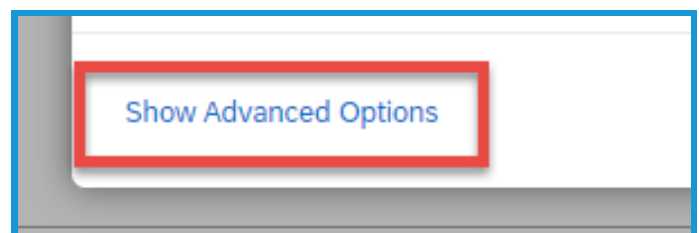
13. Type your message to the users in the message section, and use the toolbar to alter the text and content as needed.



14. If you want to use this message on other surveys, click **Save as** (1). After the message is saved you can access it from the **Load Message** drop-down menu (2).

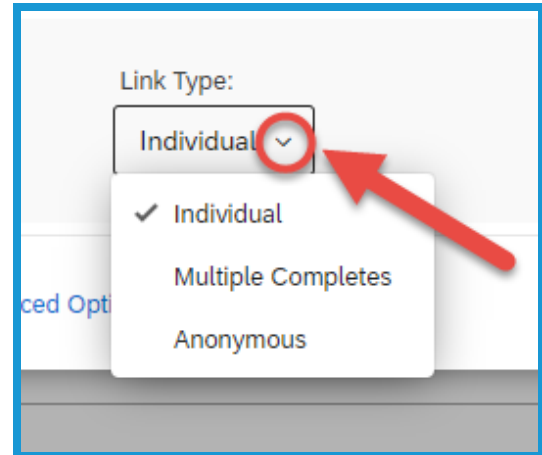


15. Click **Show Advanced Options** in the bottom left corner.

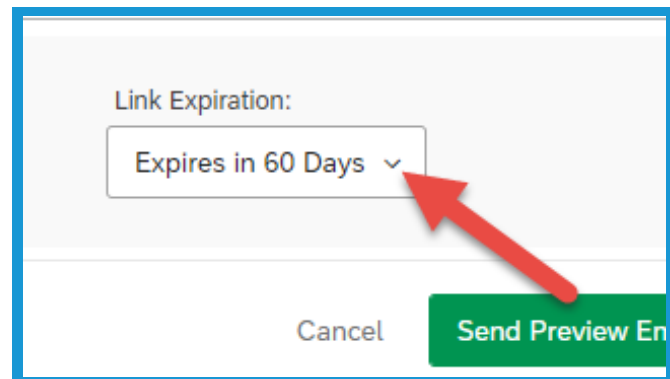


## Section 5c: Distribution - Emails

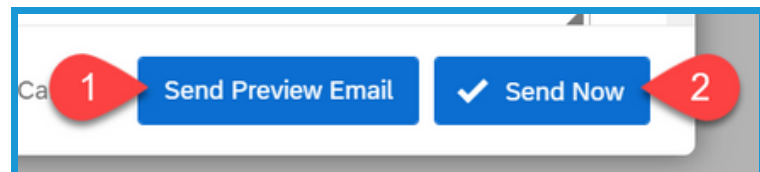
16. **Link Type**, under **Advanced Options**, allows for multiple completions of the project, or if you want the Anonymous link sent.



17. **Link Expiration**, under **Advanced Options** will allow you to set an expiration on the survey where users will no longer be able to submit feedback.

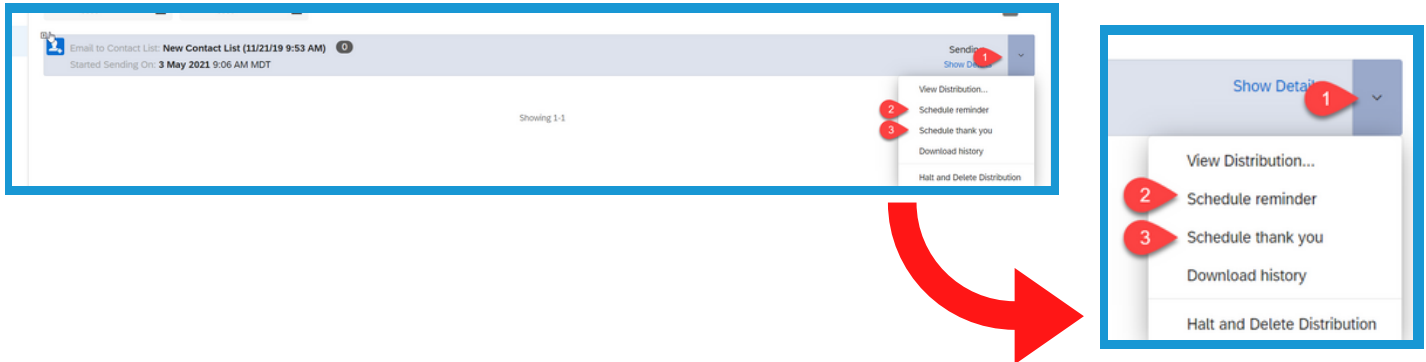


18. Click **Send Preview Email** (1) to send yourself a test message to ensure everything is formatted correctly. Once you are ready hit the **Send Email** (2) button to send the message to the recipients.

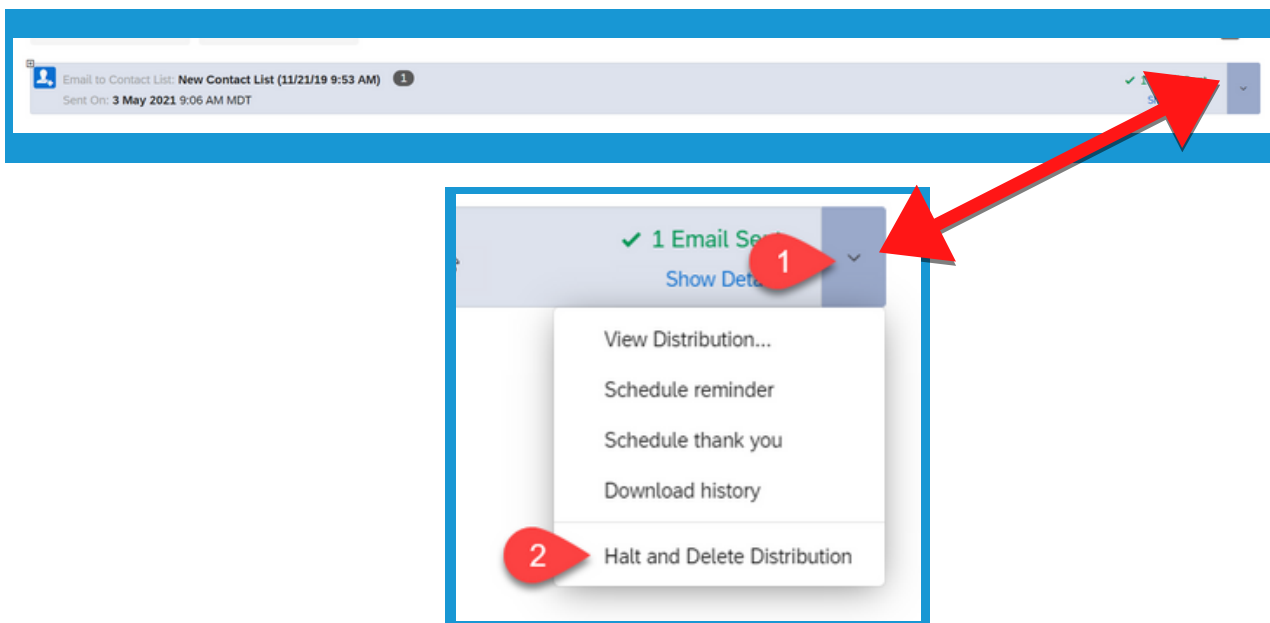


## Section 5c: Distribution - Emails

19. After the email is sent, a box will appear in the Email section. Click the dropdown menu to the right **(1)**. You can then schedule a **reminder email (2)** to the users or a **thank you email (3)**.

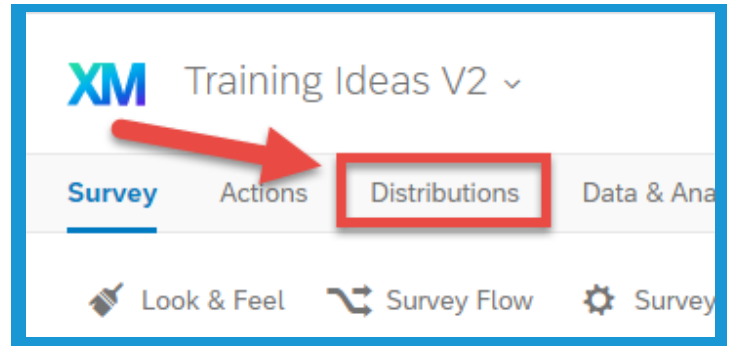


20. To delete the email, click the drop-down menu to the right of the email **(1)**. Then select **Halt and Delete Distribution (2)**.

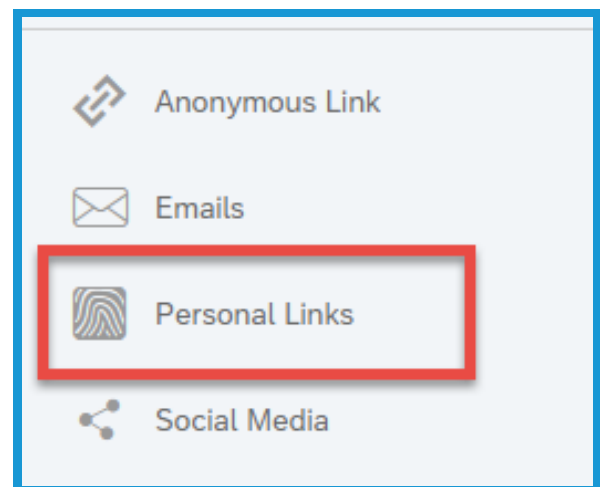


## Section 5d: Distribution - Private Links

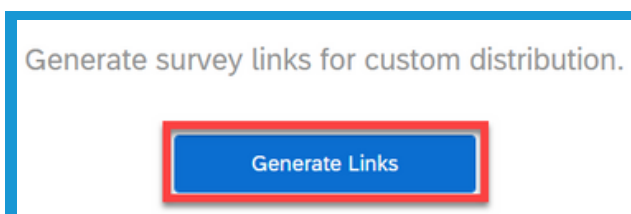
1. Click **Distributions** at the top of the survey's edit page.



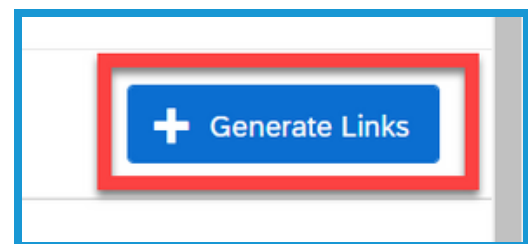
2. Click **Personal Links** on the left side of the screen.



3. Click **Generate Links** in the middle or top right corner of the screen.

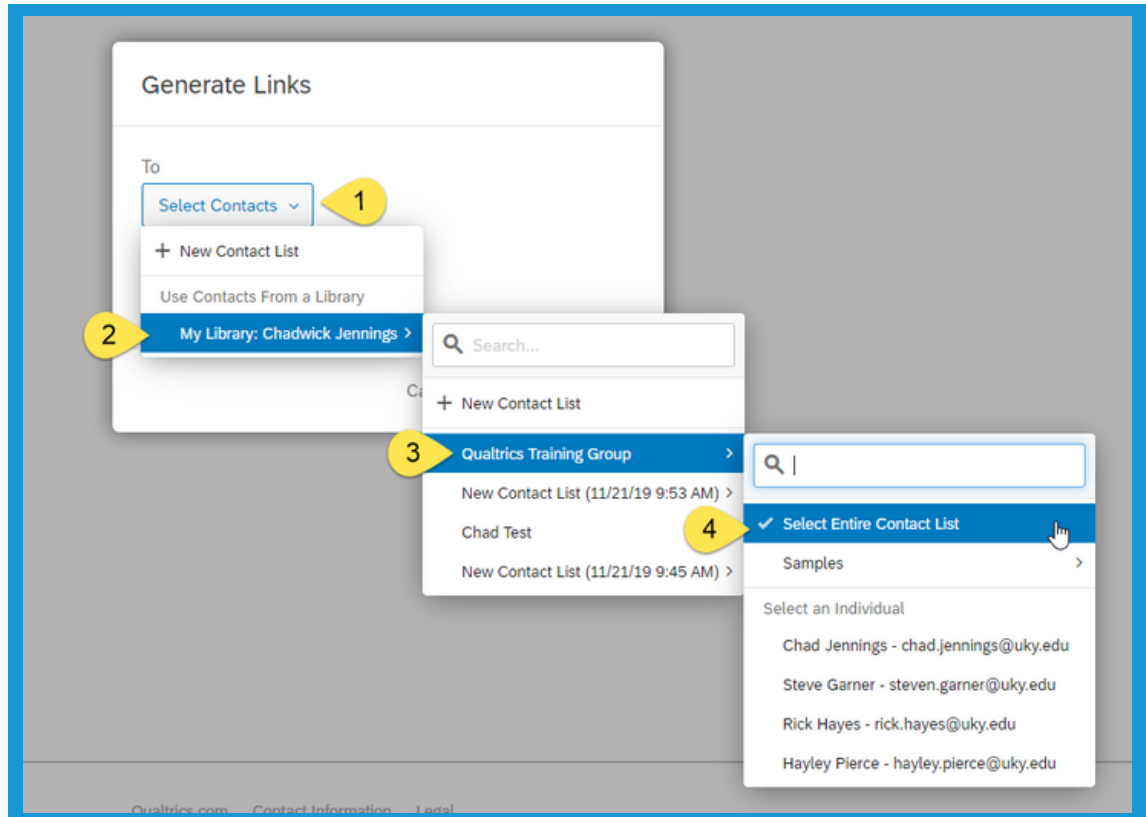


or

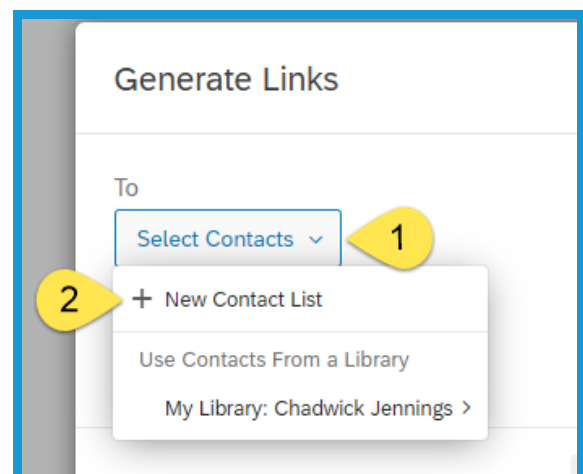


## Section 5d: Distribution - Private Links

4. Click the drop-down menu under **To** (1). Place your mouse over **My Library** (2), then the **Contact List** (3), and click **Select Entire Contact List** (4).

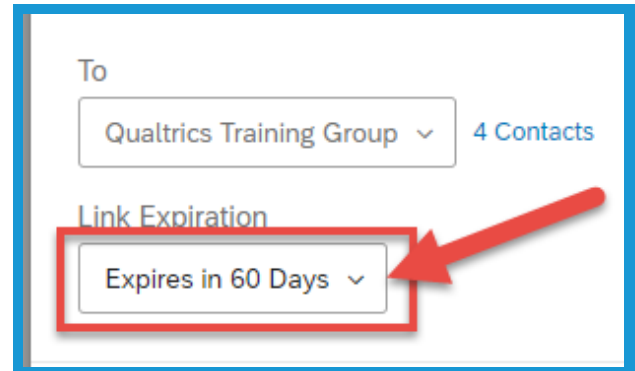


5. If creating a new list, click the drop down menu under the **To** Field (1), and select **New Contact List** (2). (See Section 5c, Steps 5-8, pg 14)

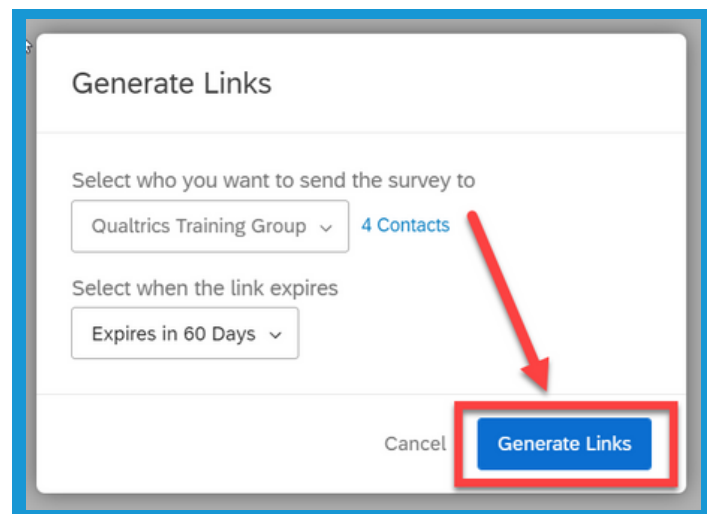


## Section 5d: Distribution - Private Links

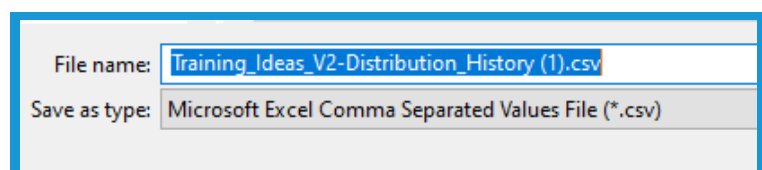
6. Click the drop-down menu to the right of **Link Expiration** to set a time frame when the links will no longer be active.



7. Click **Generate Links** in the lower right corner.



8. A csv file will generate. Choose a location to save the file.





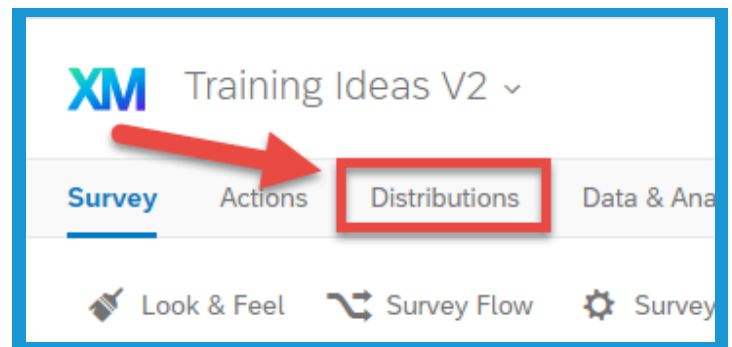
## Section 5d: Distribution - Private Links

9. The csv file will contain a column with URL's for each individual that can then be shared with them to complete the survey.

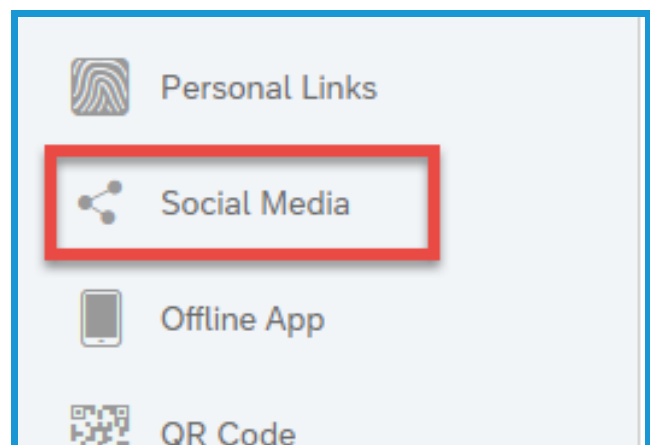
H	
Link	Link
<a href="https://uky.az1.qualtrics.com/jfe/form/SV_2gjnSlu7ffj9kx?Q_DL=ognCJXWFga9rJoo_2gjnSlu7ffj9kx_MLRP_6FKtde4MS6Yn7cF&amp;Q_CHL=gl">https://uky.az1.qualtrics.com/jfe/form/SV_2gjnSlu7ffj9kx?Q_DL=ognCJXWFga9rJoo_2gjnSlu7ffj9kx_MLRP_6FKtde4MS6Yn7cF&amp;Q_CHL=gl</a>	10/2
<a href="https://uky.az1.qualtrics.com/jfe/form/SV_2gjnSlu7ffj9kx?Q_DL=ognCJXWFga9rJoo_2gjnSlu7ffj9kx_MLRP_3OAFtsh22G3yh5r&amp;Q_CHL=gl">https://uky.az1.qualtrics.com/jfe/form/SV_2gjnSlu7ffj9kx?Q_DL=ognCJXWFga9rJoo_2gjnSlu7ffj9kx_MLRP_3OAFtsh22G3yh5r&amp;Q_CHL=gl</a>	10/2
<a href="https://uky.az1.qualtrics.com/jfe/form/SV_2gjnSlu7ffj9kx?Q_DL=ognCJXWFga9rJoo_2gjnSlu7ffj9kx_MLRP_eu0zfYY2qPi7yTj&amp;Q_CHL=gl">https://uky.az1.qualtrics.com/jfe/form/SV_2gjnSlu7ffj9kx?Q_DL=ognCJXWFga9rJoo_2gjnSlu7ffj9kx_MLRP_eu0zfYY2qPi7yTj&amp;Q_CHL=gl</a>	10/2
<a href="https://uky.az1.qualtrics.com/jfe/form/SV_2gjnSlu7ffj9kx?Q_DL=ognCJXWFga9rJoo_2gjnSlu7ffj9kx_MLRP_3IAJpHn6pP5H1xr&amp;Q_CHL=gl">https://uky.az1.qualtrics.com/jfe/form/SV_2gjnSlu7ffj9kx?Q_DL=ognCJXWFga9rJoo_2gjnSlu7ffj9kx_MLRP_3IAJpHn6pP5H1xr&amp;Q_CHL=gl</a>	10/2

## Section 5e: Distribution - Social Media

1. Click **Distributions** at the top of the survey's edit page.

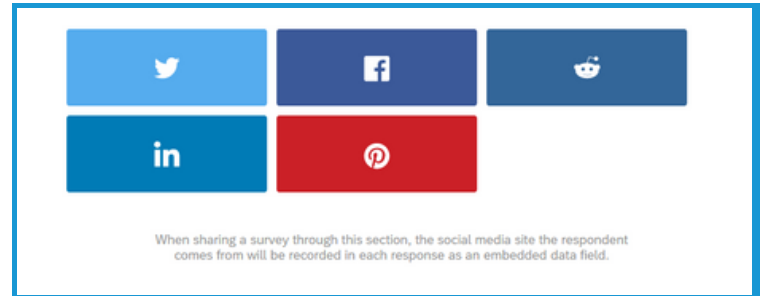


2. Click **Social Media** on the left side of the screen.



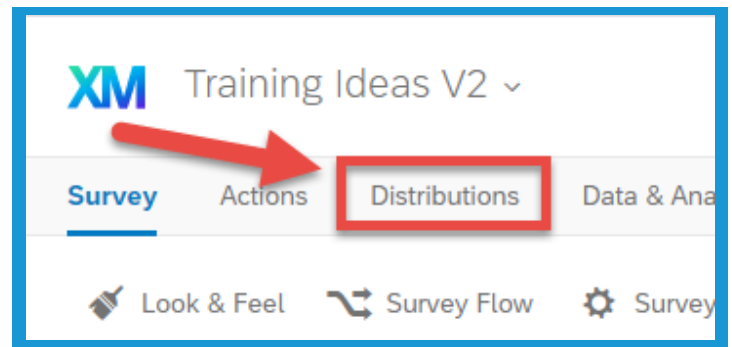
## Section 5e: Distribution - Social Media

3. Click on the Social Media button in the center of the screen. Then log on to your social media account to create a post with the Qualtrics link.

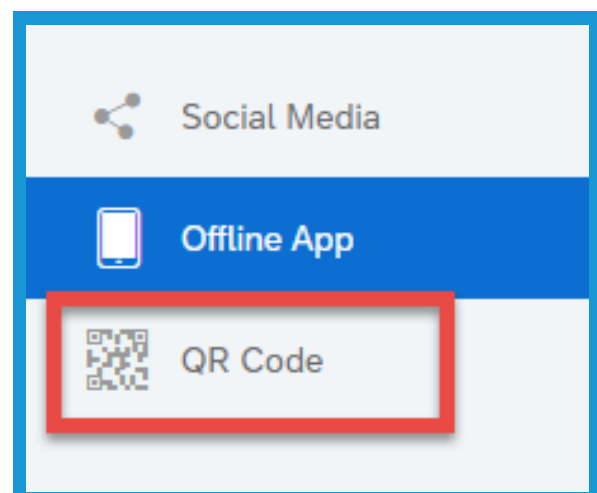


## Section 5f: Distribution - QR Code

1. Click **Distributions** at the top of the survey's edit page.



2. Click **QR Code** on the left side of the screen.



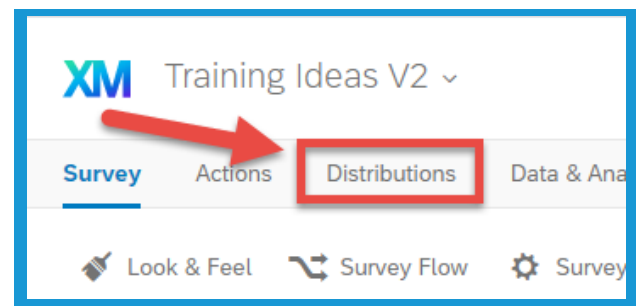
## Section 5f: Distribution - QR Code

3. Click Download QR Code to get a png file of the QR code that can then be used in the needed communication.

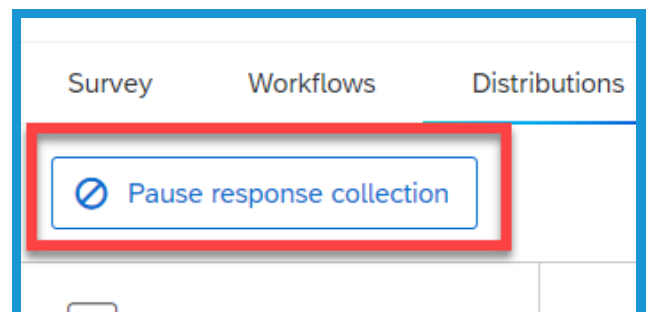


## Section 5g: Distribution - Pausing Collection

1. Click **Distributions** at the top of the survey's edit page.

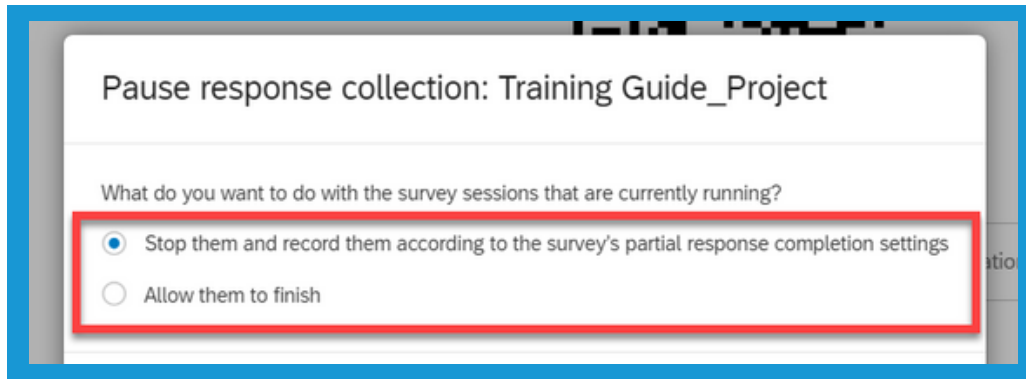


2. Click **Pause Response Collection** in the upper left corner of the screen.

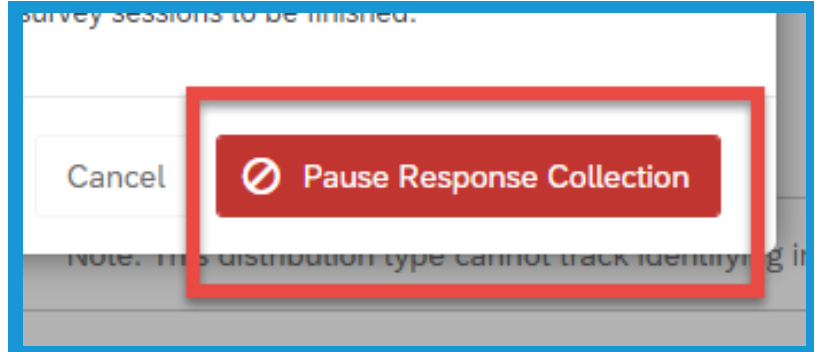


## Section 5g: Distribution - Pausing Collection

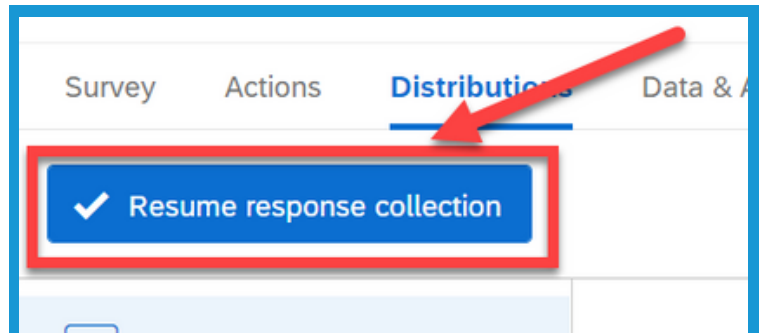
3. In the new window determine if you want to close all open surveys or allow those who have partially completed the survey to finish.



4. Click **Pause Response Collection** to disable the survey links.



5. Click **Resume Response Collection** in the upper left corner of the **Distribution** page to activate the survey again.





**University of Kentucky**  
College of Agriculture,  
Food and Environment  
*Cooperative Extension Service*

# **Qualtrics**

## **Part 2: Getting Started**

**Any questions or training request:  
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