



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

Qualtrics

Part 1: Getting Started

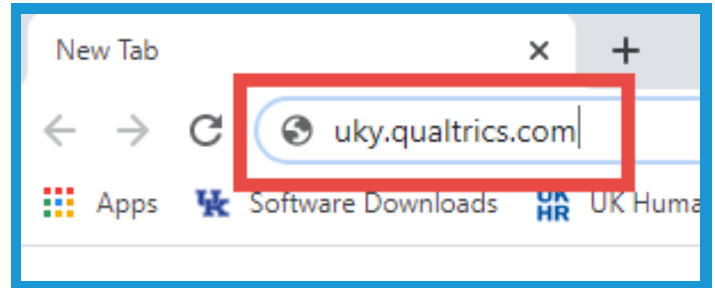
**Any questions or training request:
chad.jennings@uky.edu**

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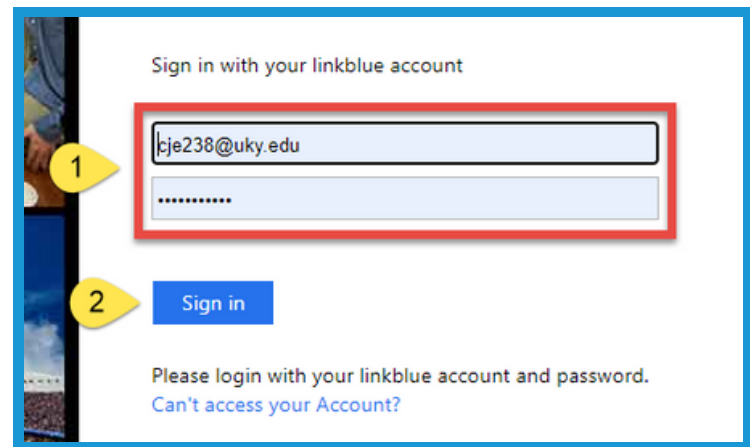
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Section 1: Accessing Qualtrics

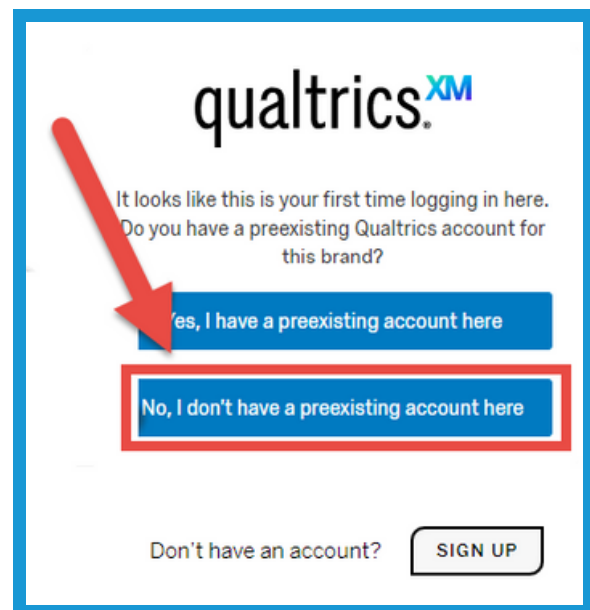
1. Open a web browser, and go to **uky.qualtrics.com**.



2. You will be redirected to the UK login screen. Enter your **linkblue credentials**, and click Sign in. You will then be asked to complete the two factor authentication process.

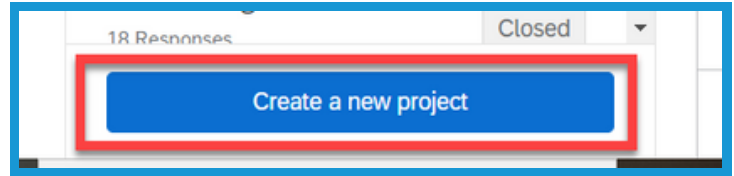


3. If you are sent to a screen that looks like this click, **"No, I don't have a preexisting account here"**. A new account will be set up for you, and you will be able to login using the UK site in the future.

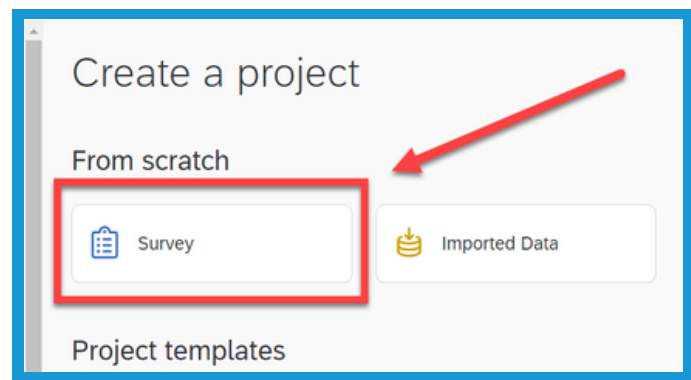


Section 2: Creating a New Project

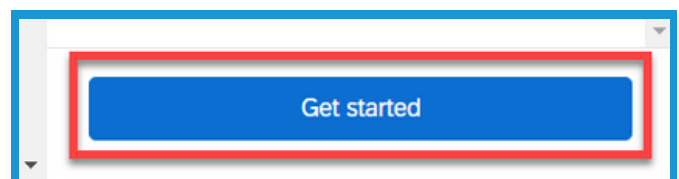
1. On the home page, select **Create a new project** in the lower left corner.



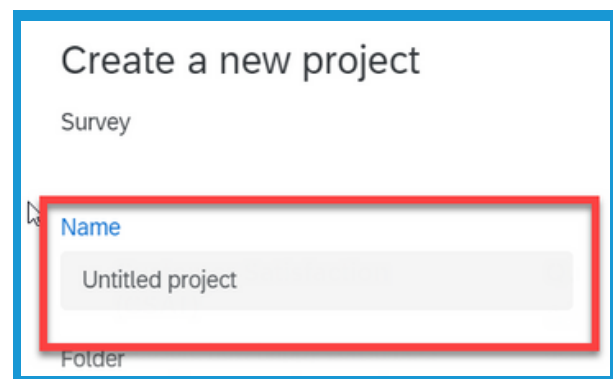
2. Under **From scratch** on the **Create a project** screen, select **Survey**.



3. Select **Get Started** in the lower right.

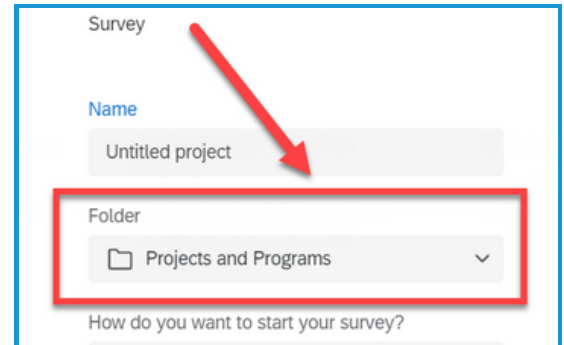


4. Give your project a title in the **Name** field on the **Create a new project** screen.



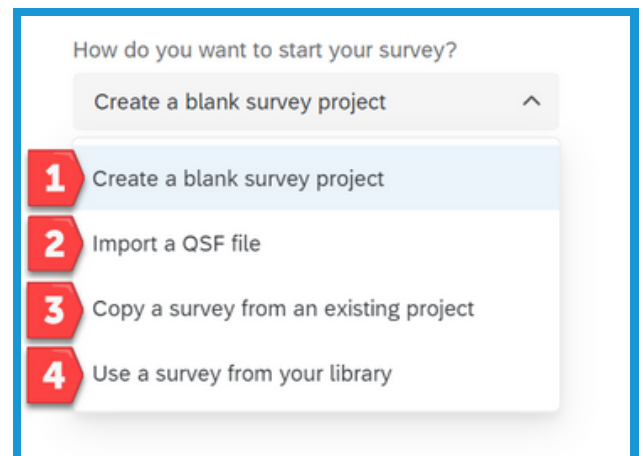
Section 2: Creating a New Project

5. Select the **Folder** dropdown menu to save your new project in a specific location.

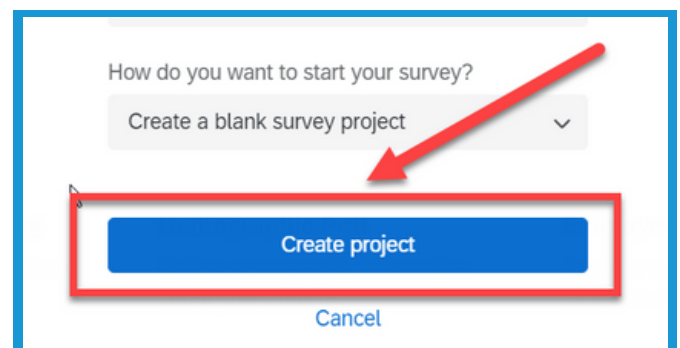


6. In the **How do you want to your survey** dropdown menu determine how you want to start your build.

1. **Create a blank survey project:** start a survey from scratch.
2. **Import a QSF file:** load a QSF file to generate a survey template.
3. **Copy a survey:** copy a previous built survey.
4. **Use a survey from your library:** choose a saved template from your survey library.

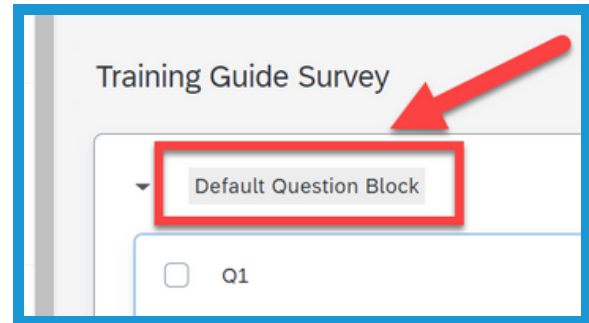


7. Click **Create Project** at the bottom of the screen.

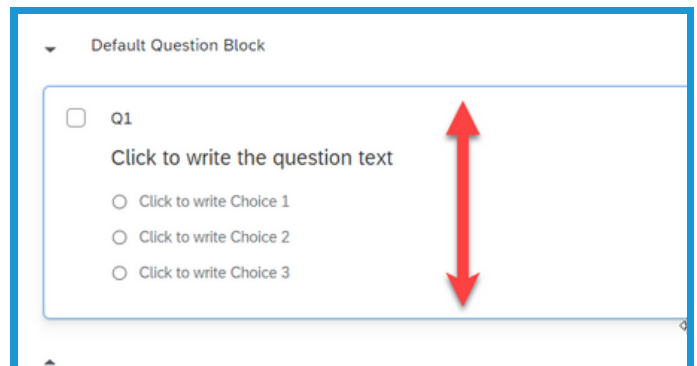


Section 3: Starting a Survey

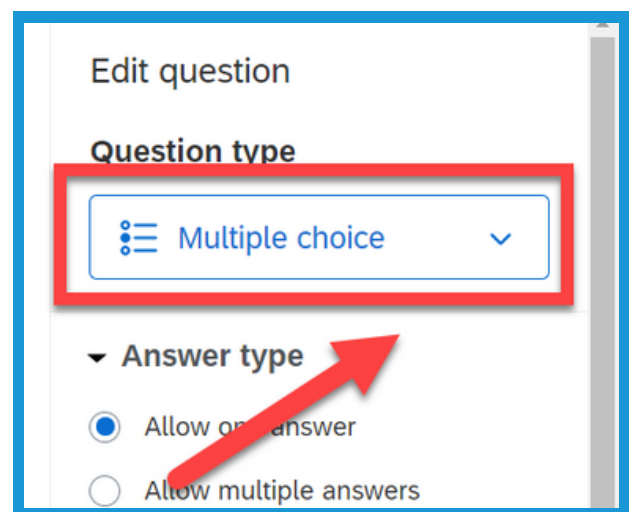
1. Click on the block title at the top of the screen to give your series of questions a title. This is not required, but it will help if you work with the Survey Flow.



2. Click inside the question box, to turn the outline blue. Once you see the blue outline, the question is ready to be edited

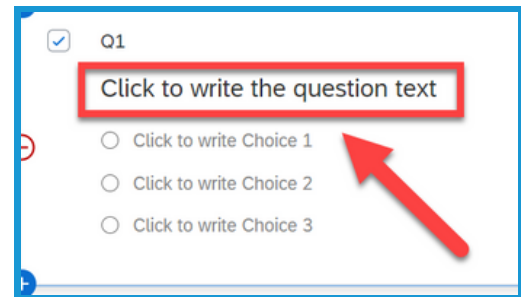


3. Click the **Question Type** dropdown menu in upper left corner to select a new question format.



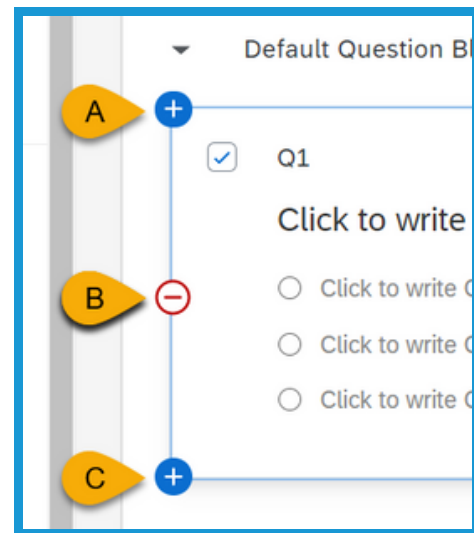
Section 3: Starting a Survey

4. Select, "**Click to write the question text**" to begin typing your question.

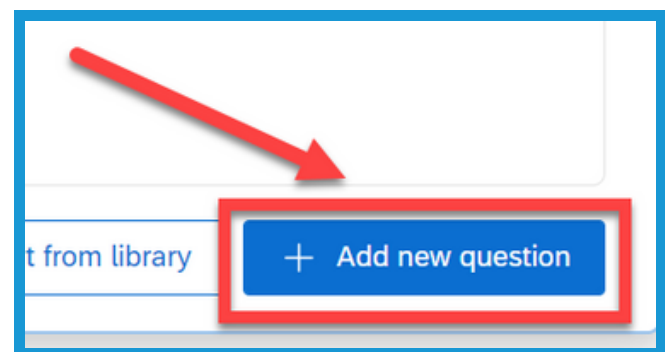


5. Place your mouse over the default question to see three icons appear to the left.

- The plus button in the upper left allows you to add a question above the current.
- The red minus will delete the question.
- The plus button in the lower left adds a question below the current.

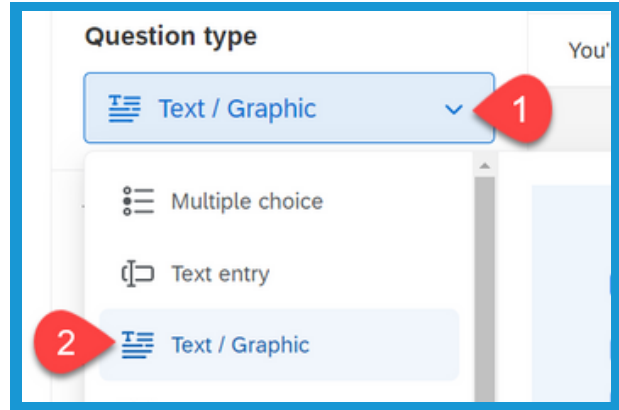


6. You can also create a question by click the **Add a new question** button in the lower right corner of the screen. A dropdown menu will appear for you to pick the needed question type.

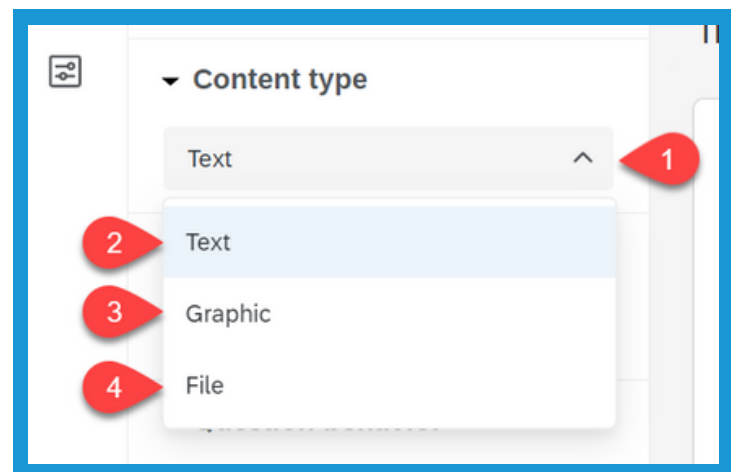


Section 4a: Question Types - Text/Graphic

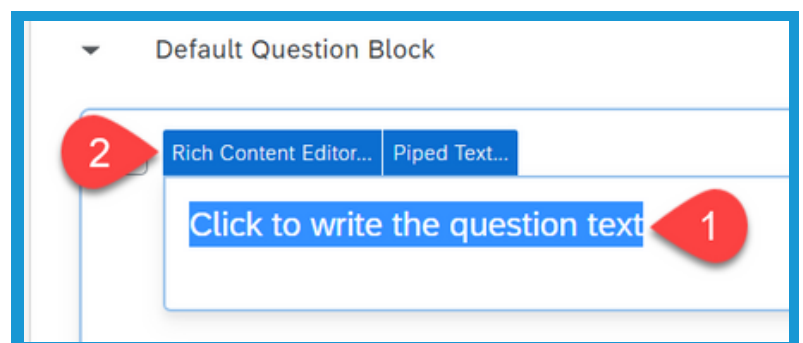
1. Click the dropdown menu in the upper left corner to change the question type **(1)**. Select **Text/Graphic (2)**. This can be used as an introduction to the survey, instructions, or to provide additional information.



2. Click the dropdown menu under Content Type in the question menu on the left side of the screen **(1)**. Choose between **text**, **graphic**, or **file (2-4)** for the static content you want to add.

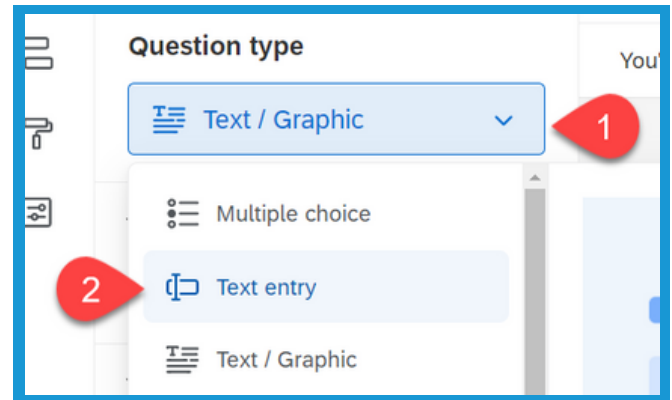


3. Click the box below the question number to begin modification. Click the **Rich Content Editor** to format the text **(See Section 5, Page 18)**.

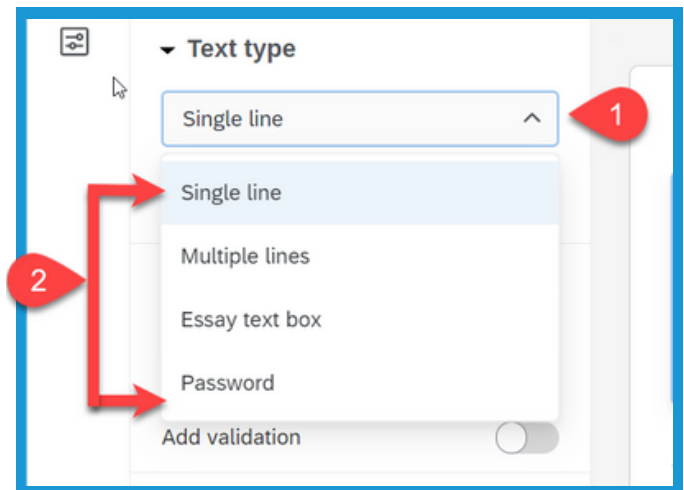


Section 4b: Question Types - Text Entry

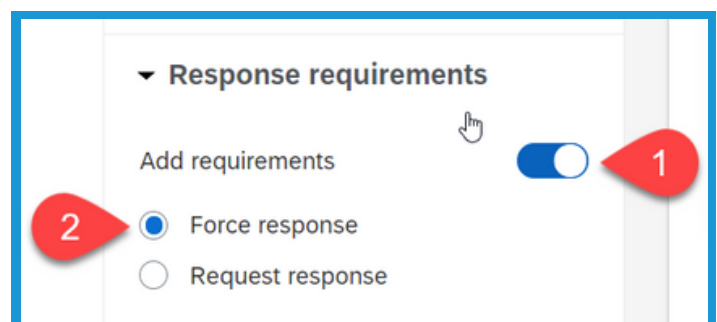
1. Click the dropdown menu in the upper left corner to change the question type (1). Select **Text Entry** (2).



2. Click the **dropdown menu** under **Text type** in the question menu on the left side of the screen. Select the desired question type.

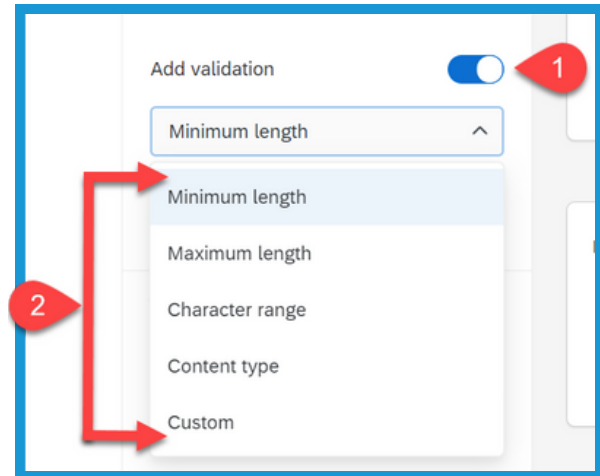


3. Click the button next to **Add requirements** (1), located under **Response requirements** in the question menu on the left side of the screen. Select **Force response** (2) to make this question a required field.

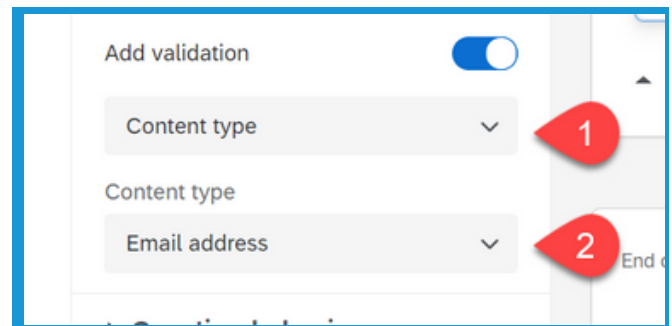


Section 4b: Question Types - Text Entry

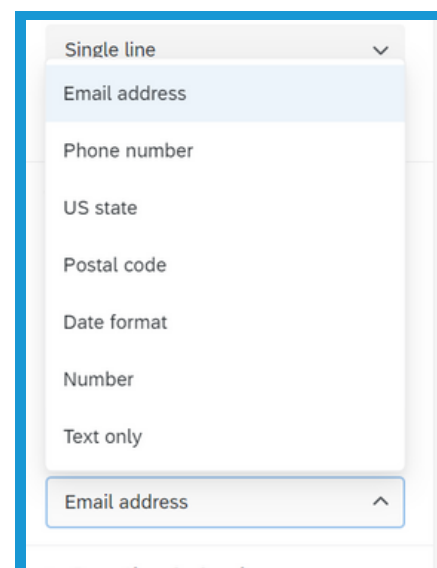
4.If **Add validation (1)** is turned on in the Question menu, a new dropdown menu will appear. Open this menu to select one of the 5 options available **(2)**.



5.If **Content Type (1)** is selected from the **Add Validation** dropdown menu, additional options will appear **(2)**.

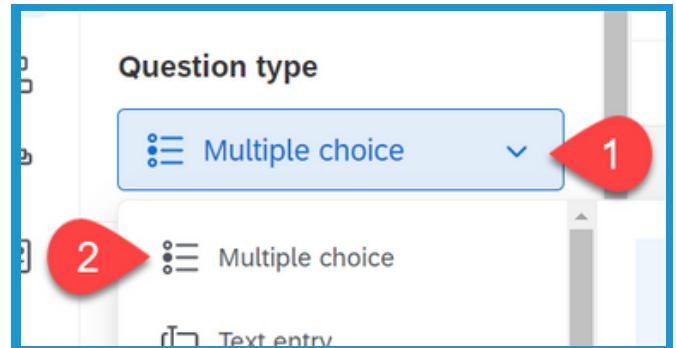


6. With these selections, the survey will look for specific requirements before the answer can be submitted. Example, an email address will have to contain "@email.com" in order for the survey to accept the response.

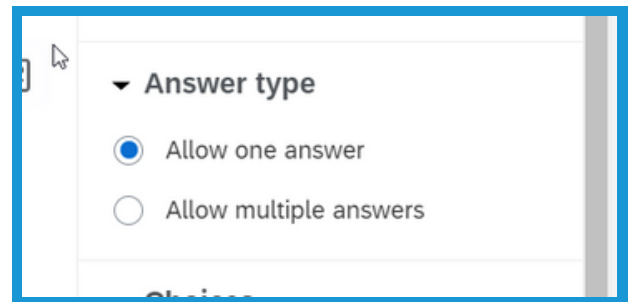


Section 4c: Question Types - Multiple Choice

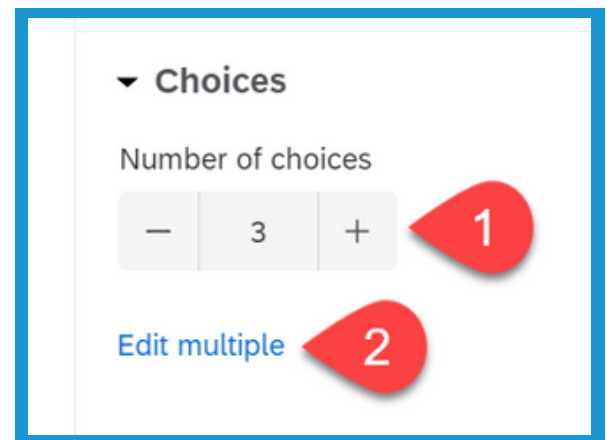
1. Click the **dropdown menu** under **Question Type (1)** in the upper left corner to change the question type. Locate **Multiple Choice (2)**. **Please note that when you create a new question, Multiple Choice is the default format.**



2. Under **Answer Type** on the left side of the screen, select **Allow Multiple Answers** to allow users to be able to select more than one choice. By **default**, **Allow one answer** is the selected option.

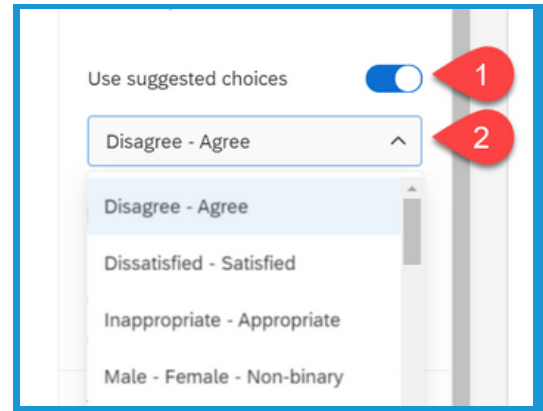


3. Under **Choices** on the left side of the screen, lower or raise the number of choices by clicking on the plus or minus **(1)**. Click on the number to manually type in the desired amount. If you have a lot of choices to type in, you can select **Edit multiple (2)** to paste the answers into a text box. **Please note that this option is only available before the Survey is published.**

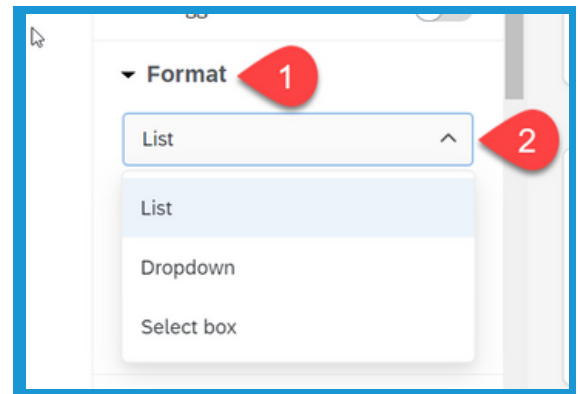


Section 4c: Question Types - Multiple Choice

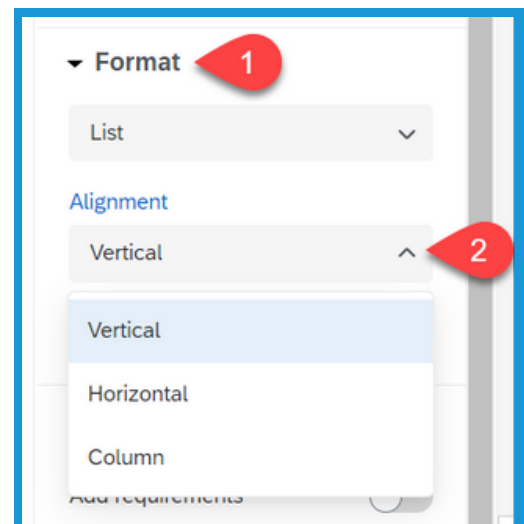
4. Select **Use suggested Choices (1)** to get a list of default choices. Click the dropdown menu **(2)** to see the various choice options.



5. Locate the **Format section (1)** of the **question menu** on the left side of the screen. Click the **List dropdown menu (2)** to select the way the answers will be displayed (**List, Dropdown, or Select box**).

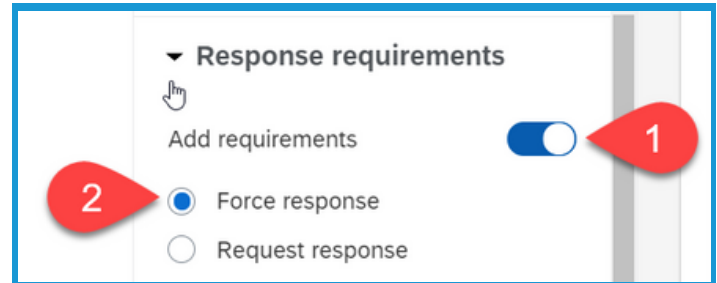


6. Also in **Format section (1)** of the **question menu** is the **Alignment dropdown menu (2)**. Click this menu to change how the answers are seen on the screen.

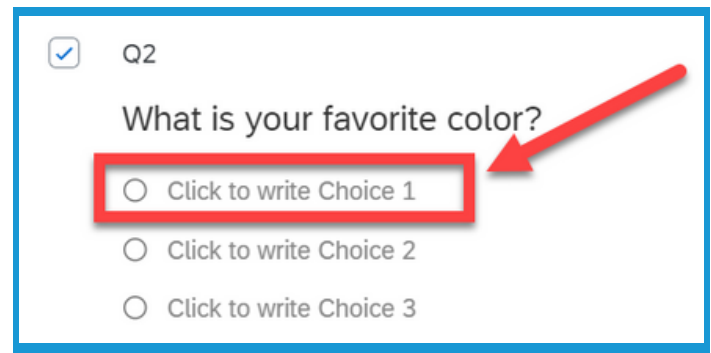


Section 4c: Question Types - Multiple Choice

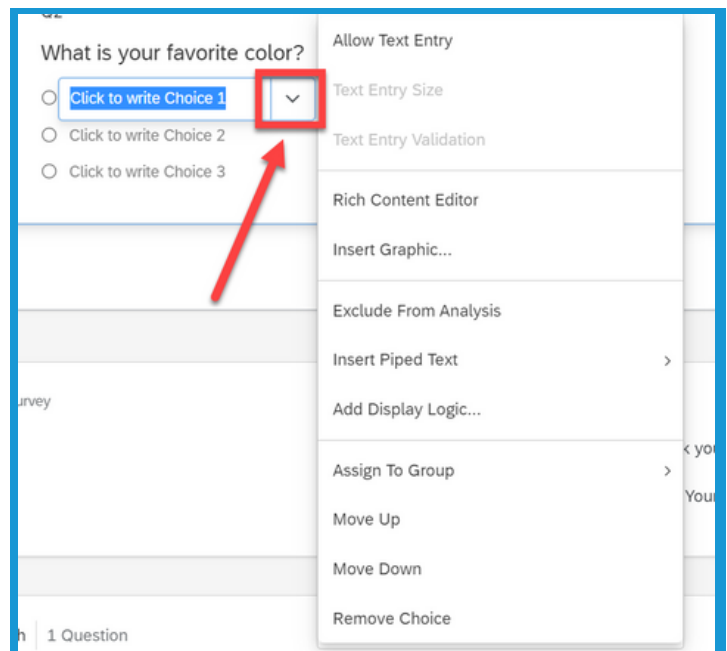
7. Under **Response requirements** on the left side of the screen select **Add requirements (1)**, then click **Force response (2)** to make this a required question in the survey.



8. To change the choice text, click on the Choice to activate the text box. You can then type in options.



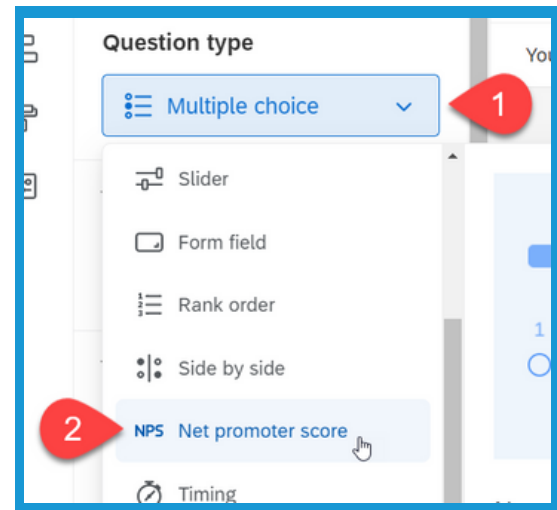
9. After clicking the default option, select the drop-down menu to the right. You will see additional options that include removing the choice, or moving it up or down the list.



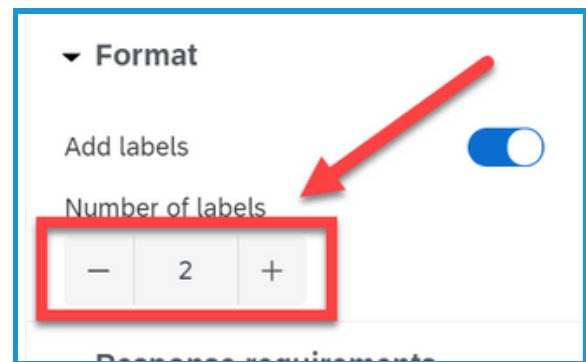
Section 4d: Question Types

- Net Promoter Score (NPS)

1. Click the **dropdown menu** under **Question Type (1)** in the upper left corner to change the question type. Locate **Net promoter score (2)**.

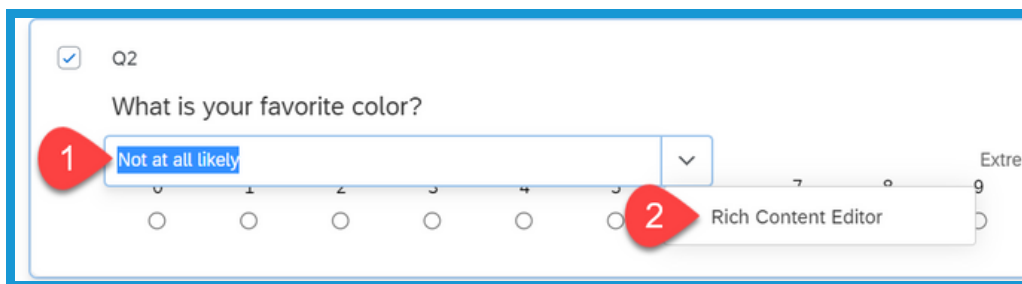


2. Under **Format** on the left side of the screen you can increase or decrease the **number of labels** that appear above the set of numbers. You can also click on the number to manually type in the desired amount.



Section 4d: Question Types - Net Promoter Score (NPS)

3. To change the labels, click on them to begin typing the desired text. To the right of the text field, click the drop-down menu to access the **Rich Content Editor** (See Section 5, Page 21). This will allow you to format the text (size, color, style, etc).

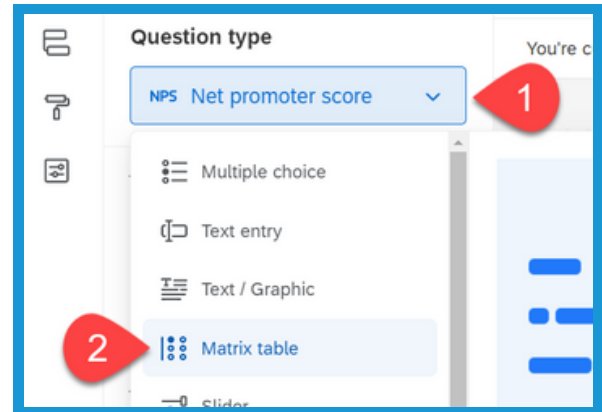


4. Under **Response requirements** on the left side of the screen select **Add requirements** (1), then click **Force response** (2) to make this a required question in the survey.

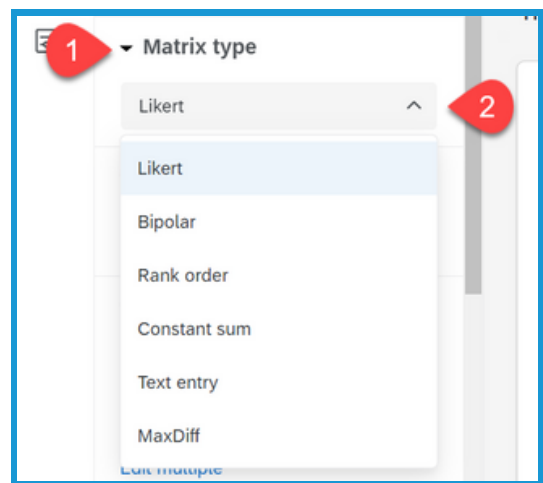


Section 4e: Question Types - Matrix Table

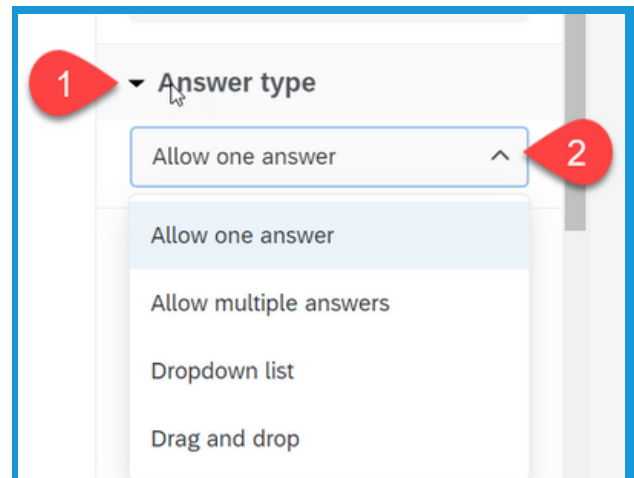
1. Click the **dropdown menu** under **Question Type** (1) in the upper left corner to change the question type. Locate **Matrix Table** (2).



2. Under **Matrix type** (1) on the left side of the screen, select the **dropdown menu** (2). By default you are provided the **Likert scale**.

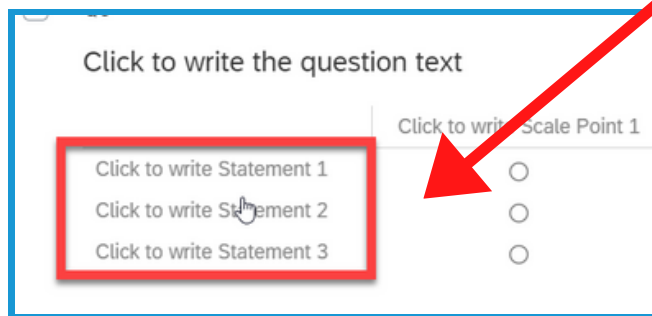
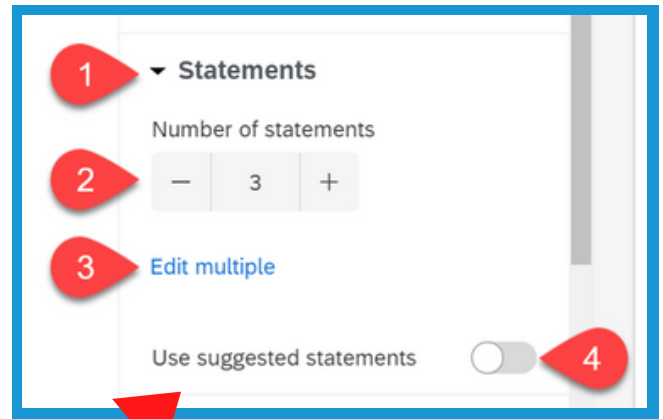


3. Under **Answer Type** (1) on the left side of the screen, select the **dropdown menu** (2). In this section you can alter how the respondents interact with the question.

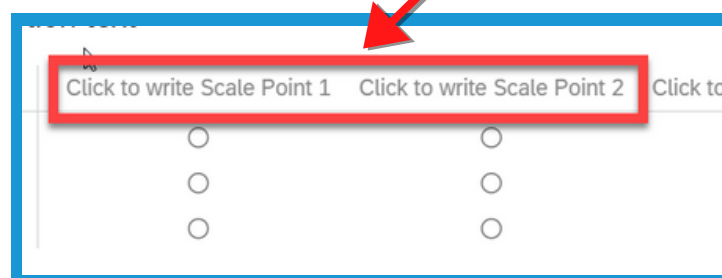
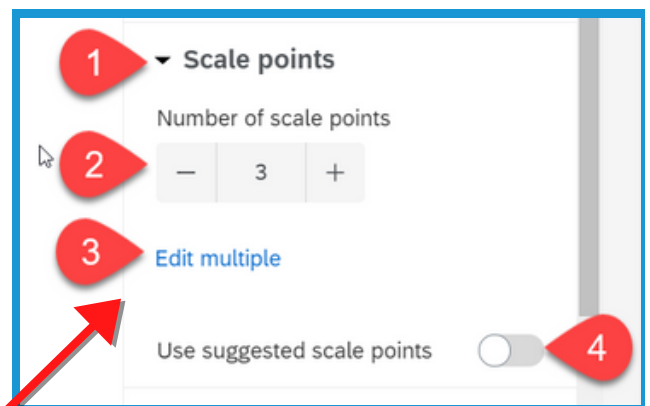


Section 4e: Question Types - Matrix Table

4. Under **Statements (1)** on the left side, click the **plus or minus buttons (2)** to edit the amount. You can also click the number to type in the desired total. Select **Edit multiple (3)** to paste the answers into a text box. Turn on **Use suggested statements (4)** to select from the Qualtrics provided values.

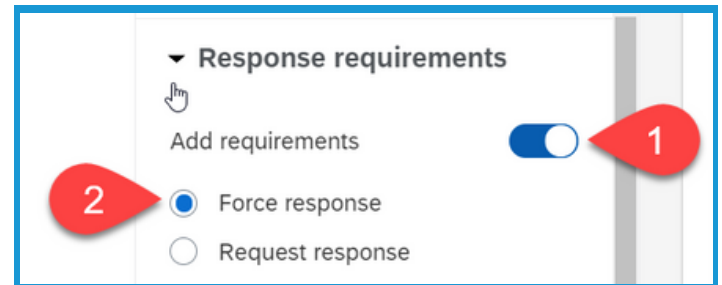


5. Under **Scale points (1)** on the left, click the **plus or minus buttons (2)** to edit the amount. You can also click the number to type in the desired total. Select **Edit multiple (3)** to paste the answers into a text box. Turn on **Use suggested scale points (4)** to select from the Qualtrics provided values.



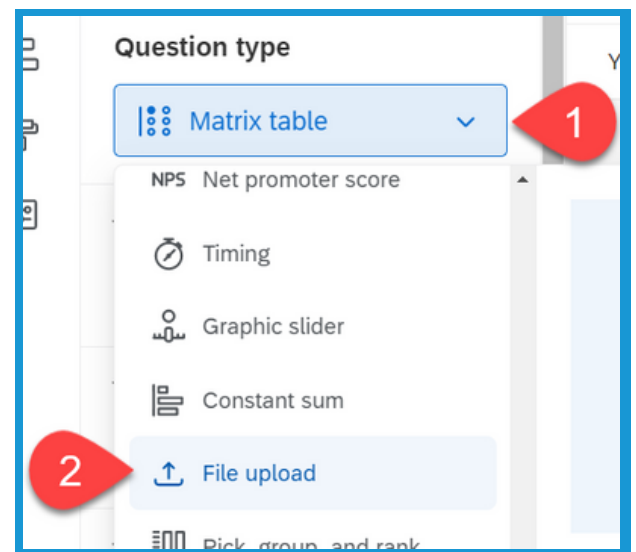
Section 4e: Question Types - Matrix Table

6. Under **Response requirements** on the left side of the screen select **Add requirements (1)**, then click **Force response (2)** to make this a required question in the survey.

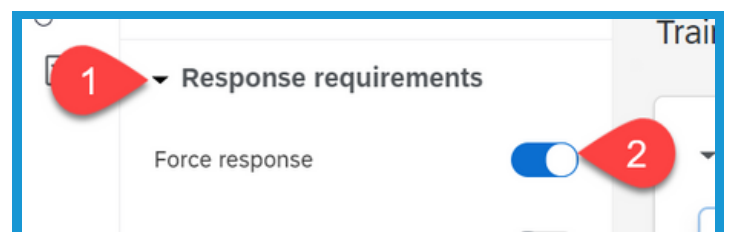


Section 4f: Question Types - File Upload

1. Click the **dropdown menu** under **Question Type (1)** in the upper left corner to change the question type. Locate **Matrix Table (2)**.

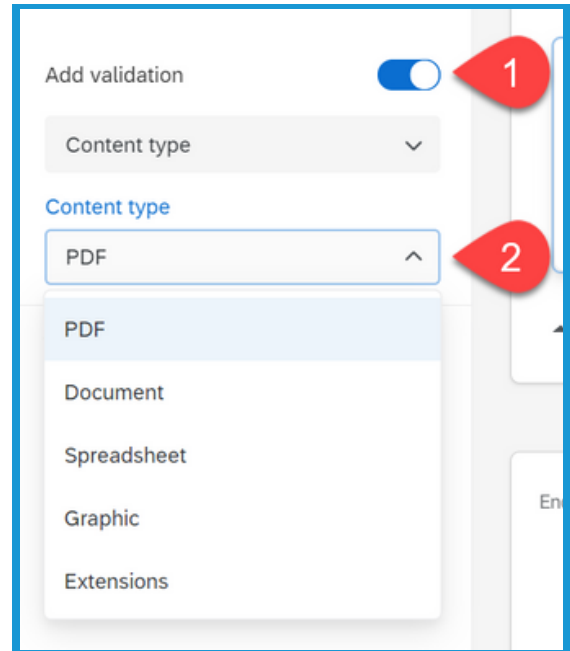


2. Under **Response requirements (1)** on the left side, select **Force response (2)** to make the question a required field.

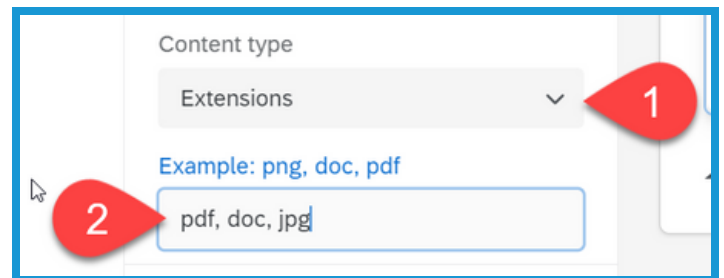


Section 4f: Question Types - File Upload

3. Select the **Add validation button (1)** on the left side of the screen to specify what file can be loaded to the survey. Click the **Content type dropdown menu (2)** to select the desired format.

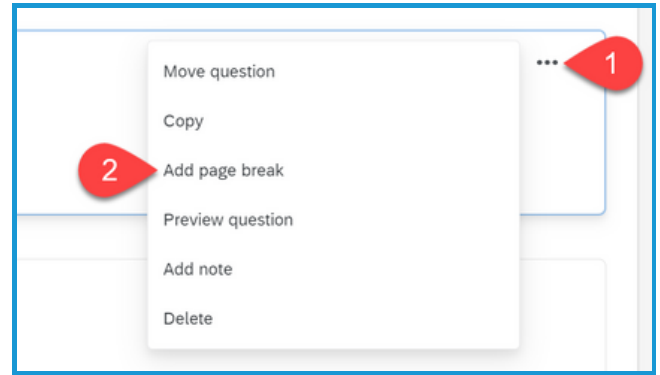


4. If Extensions is selected under **Content Type (1)**, you can type in multiple format types in the **field provided (2)**. **Be sure after each file format, to enter a comma and a space before entering the next extension.**

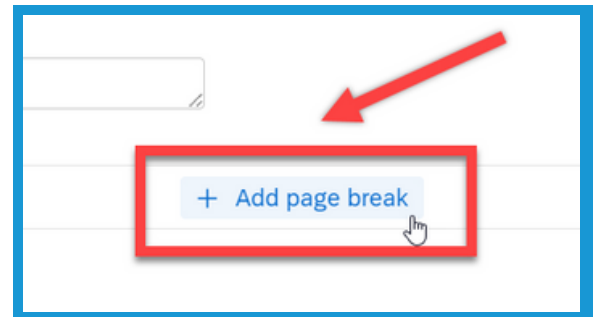


Section 5: Adding a Page Break

1. Click the **three dots (1)** in the upper right corner of the question. Select **Add page break (2)**.
Or.....

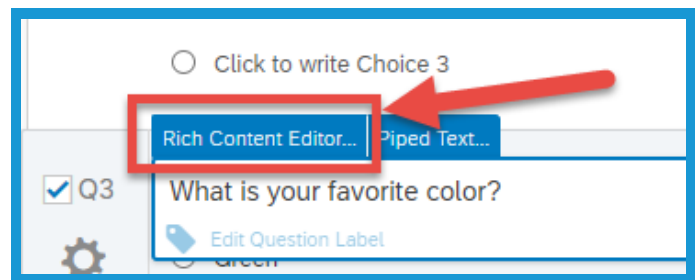


2. Place your mouse in the space between two questions. Click the **Add page break** button that appears.



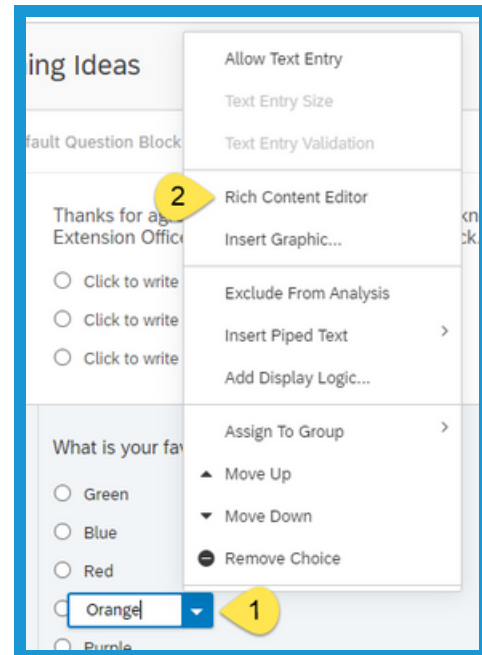
Section 6a: Rich Content Editor

1. To access the Rich Content Editor of your question, click the text box that contains the question. Then click the **Rich Content Editor** tab above the field.

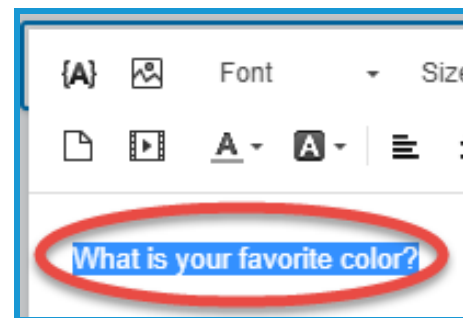


Section 6a: Rich Content Editor

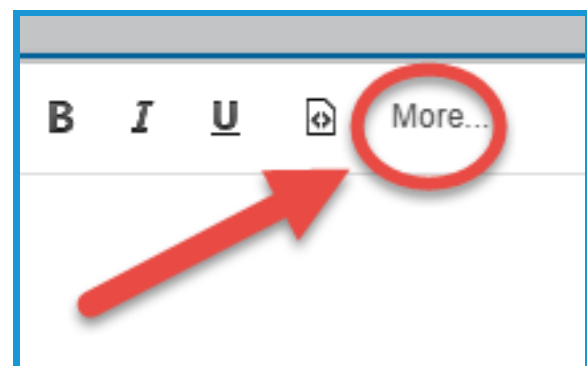
2. If you are trying to modify the text for an answer, click the drop-down menu to the right of the field. Then click **Rich Content Editor**.



3. Click and drag over the text to highlight what needs to be formatted.

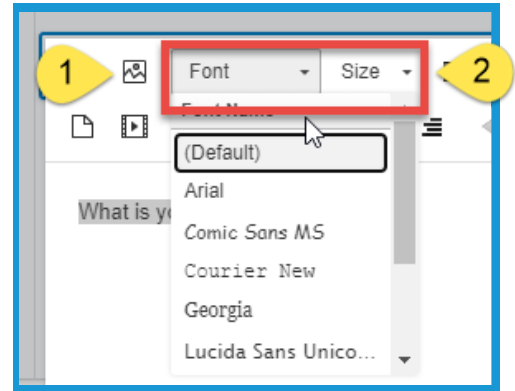


4. On the right side of the window, make sure to click **More** to see additional formatting options.

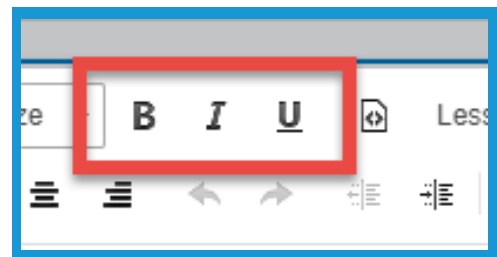


Section 6a: Rich Content Editor

5. In the Editing window you can insert a graphic (1) or change the font style and size by clicking on the drop-down menu (2).



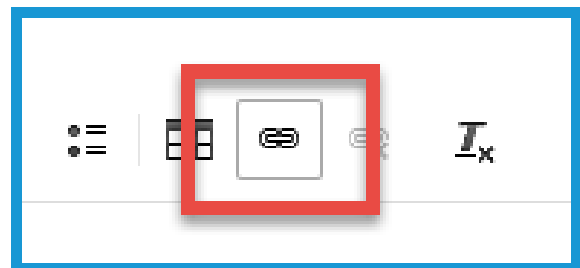
6. You can bold, italicize, or underline your text.



7. The text color (1) and fill color of the text (2) can be modified.

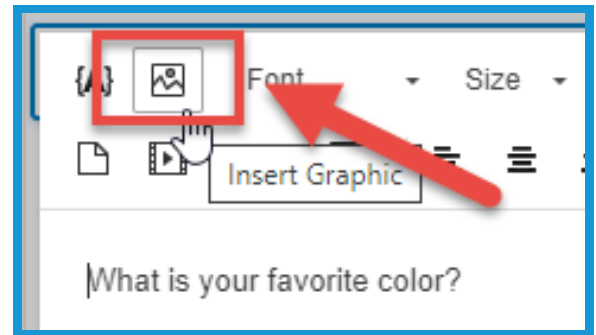


8. Click on the chainlink button to insert a hyperlink into your question or options.

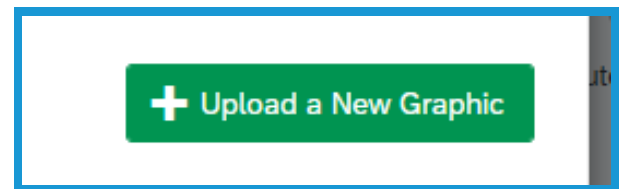


Section 6b: Rich Content Editor - Insert a graphic

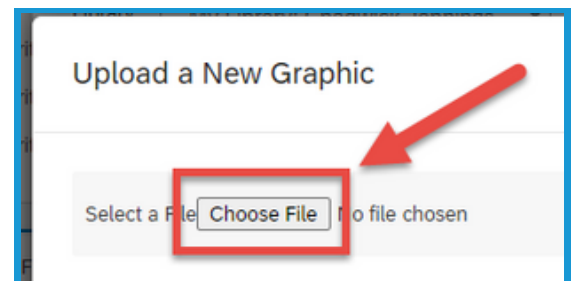
1. Click the **Insert Graphic** button in the Rich Content Editor.



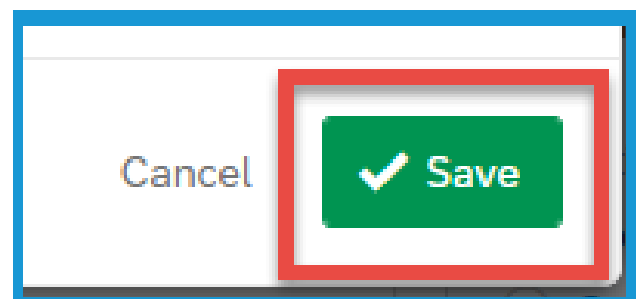
2. Click the **Upload a New Graphic** button in the upper right corner of the new window.



3. Click **Choose File** in the new window, and locate the graphic you are wanting to use on your computer.



4. Click **Save** in the lower right corner.

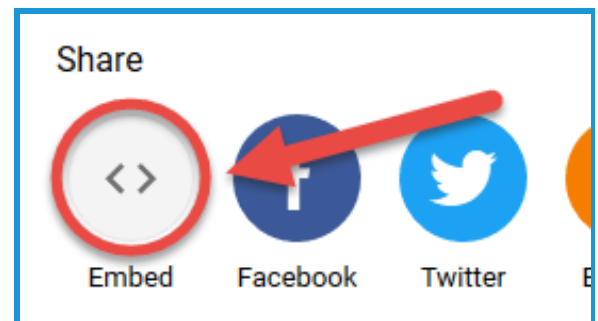


Section 6c: Rich Content Editor - Load a Video Link (YouTube)

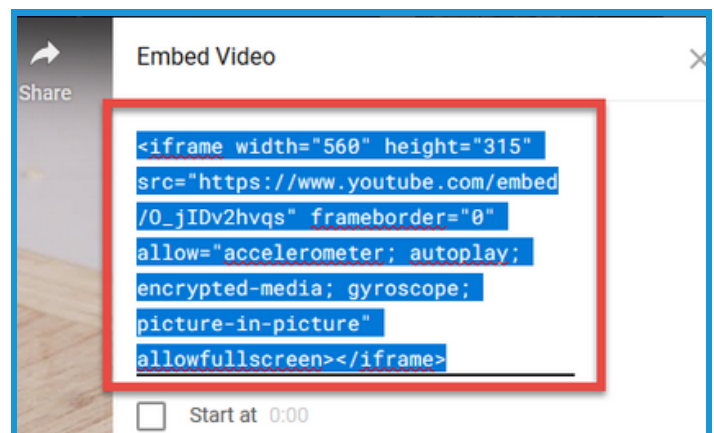
1. Go to **YouTube**, and find the video you want to post. Click **Share** located in the lower right corner below the video.



2. Click **Embed** in the new window.

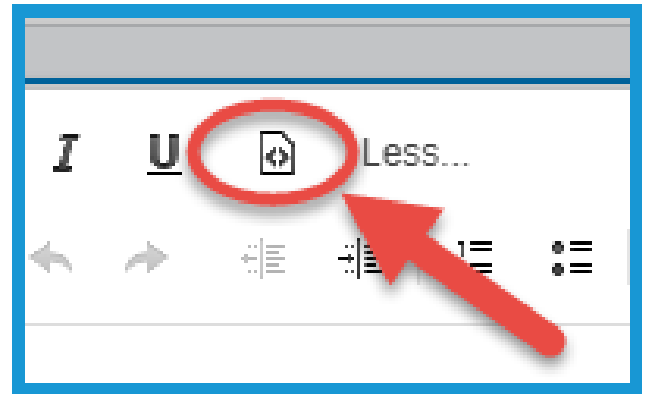


3. Copy the **Embed Code** that appears in the new window. Then go back to your Qualtrics survey.

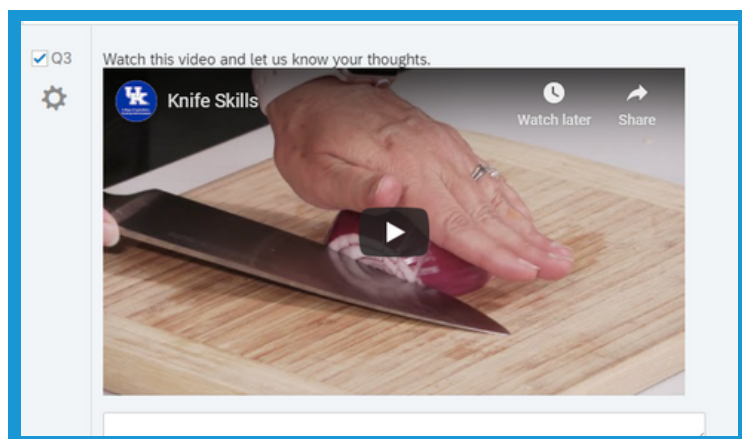
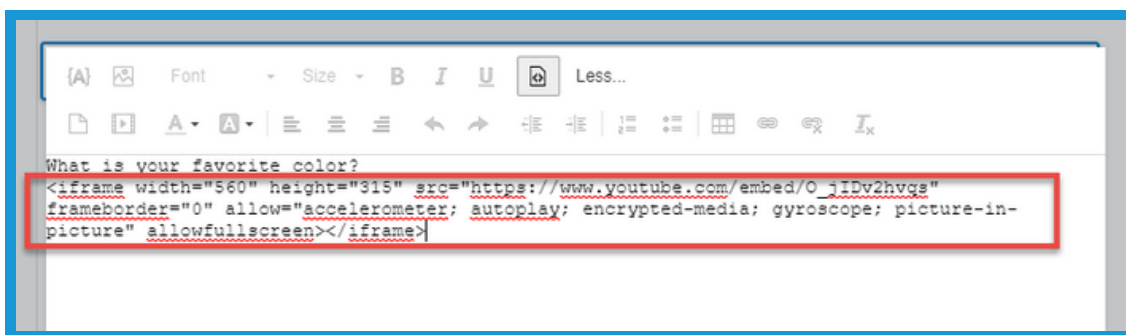


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4. Back in the Rich Content Editor of the question or choices, click the **Source** button.



5. Paste the **Embed Code** that was copied from YouTube into the text box. Then click out of the box to load the video.



Index of Question Types

Captcha Verification - Used to ensure that your respondents aren't robots. This question has participants respond to a challenge to verify they are real humans.

Constant Sum - Collects numeric data and displays a sum to the respondent. This type is often used for allocation assessments, such as defining how you spend your time in different activities.

Drill Down - Helps respondents choose from a long list by starting with a broad category and then honing in on the choices that are relevant to the respondent.

File Upload - Used to collect information beyond the survey questions, such as user-uploaded photos or documents.

Form Field – Gather standard form information such as name and emails address.

Graphic Slider - This variation of the Slider question has respondents use various graphic options, such as changing a frown to a smile or choosing a grade, to indicate their level of preference.

Heat Map - Lets respondents click a specific point on an image. In your data, you can see a heat map that shows which parts of the image were most often clicked. This type is often used for web development (e.g., eye flow analysis) and advertisement testing.

Highlight - Allows you to present survey participants with an interactive text sample. Participants can select words from the text and evaluate using criteria you choose. For example, whether they like or dislike the selected text.

Hot Spot - Allows respondents to interact with regions of an image. This type is often used in usability testing and concept testing.

Matrix Table - Used to collect multiple pieces of information in one question. This type provides an effective way to condense your survey or to group similar items into one question.

Meta Info - Reports the public information about the respondent's computer, such as their browser and operating system. The question requires no respondent action and is completely hidden.

Multiple Choice - Forms the basis of most research. They can be displayed as a traditional list of choices or as a dropdown menu, select box, etc.

Net Promoter Score - Tracks customer loyalty with one simple, standardized question: "On a scale from 0-10, how likely are you to recommend our company to a friend or colleague?"

Index of Question Types

Pick, Group, and Rank - Used for sorting activities. Respondents place items into groups and have the option to rank the items within the group.

Rank Order - Used to determine each respondent's order of preference for a list of items.

Signature - Presents survey participants with an entry box where they can draw their signature. On a desktop, they can use their mouse, and on a mobile device they can use their finger.

Slider - Lets respondents indicate their level of preference with a draggable bar rather than a traditional button or checkbox.

Side by Side - Lets you ask multiple questions in one condensed table and provides an effective way of shortening your survey while gathering the same amount of data.

Text Entry - Used to gather open-ended feedback from respondents. These responses can be lengthy essays, standard form information such as name and email address, or anything in between.

Text /Graphic - Can be used to add an introduction or instructions to your survey, or wherever you need to display content to the respondent, without asking for feedback.

Timing - Used to time—as well as limit—how long participants spend on a page of the survey.



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Qualtrics

Part 1: Getting Started

**Any questions or training request:
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