



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

Qualtrics: Additional Features

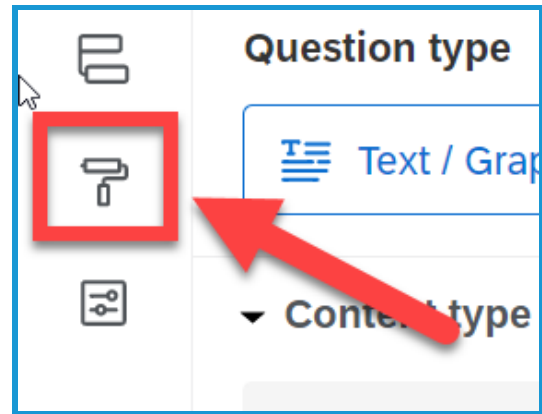
**Any questions or training request:
chad.jennings@uky.edu**

Table of Contents

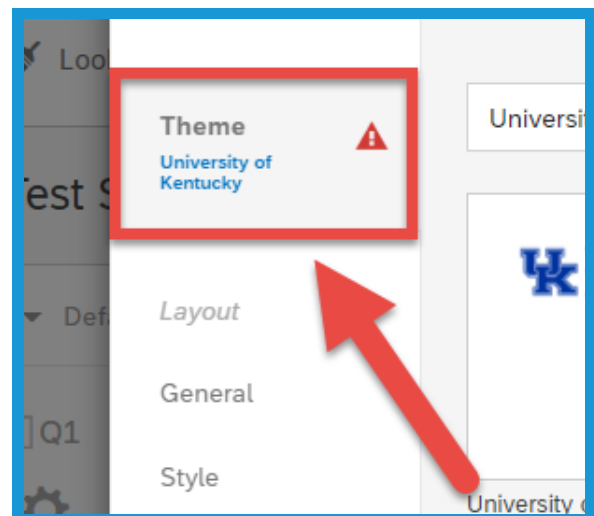
Section 1: Look & Feel	
Section 1a: Changing the Theme.....	1
Section 1b: Next & Previous Buttons.....	2
Section 1c: Progress Bars.....	5
Section 1d: Questions Per Page.....	6
Section 1e: Headers & Footers.....	7
Section 1f: Adding Motions.....	10
Section 2: ExpertReview Score.....	13
Section 3: Translation.....	15
Section 4: Scoring.....	18
Section 5: Email Workflow.....	20

Section 1a: Look & Feel - Changing the Theme

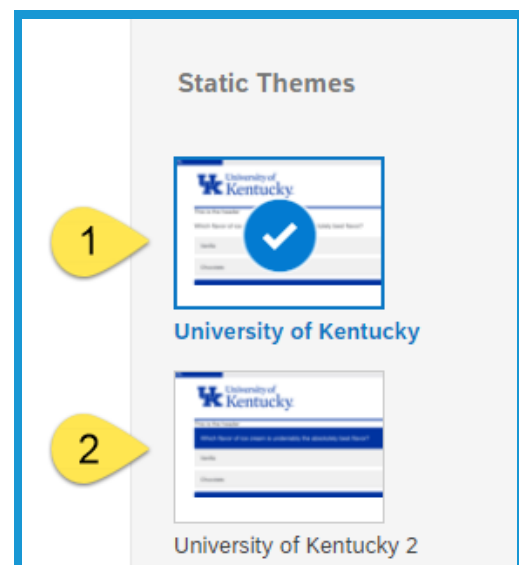
1. Select the **Look & Feel** button at the top left corner of the survey edit screen.



2. Select **Theme** in the top left of the new window.

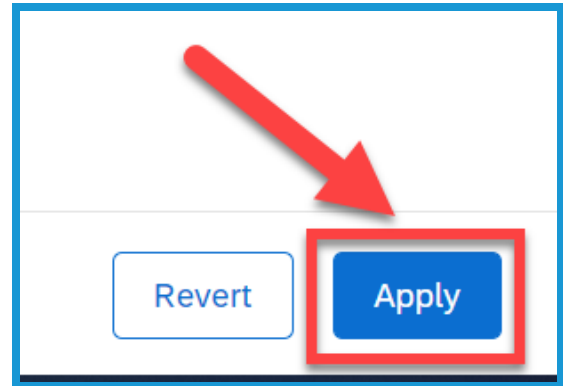


3. Scroll down to Static Themes in the new menu that appears on the left. Choose between one of the two UK approved themes.



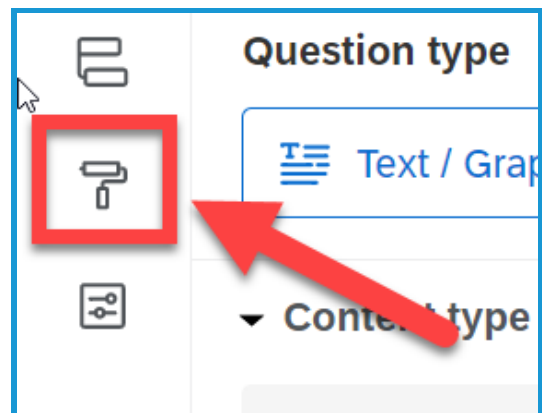
Section 1a: Look & Feel - Changing the Theme

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

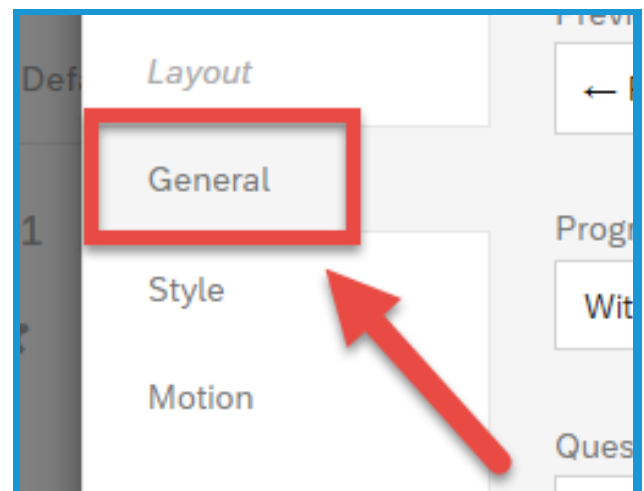


Section 1b: Look & Feel - Next and Previous Buttons

1. Select the **Look & Feel** button at the top left corner of the survey edit screen.

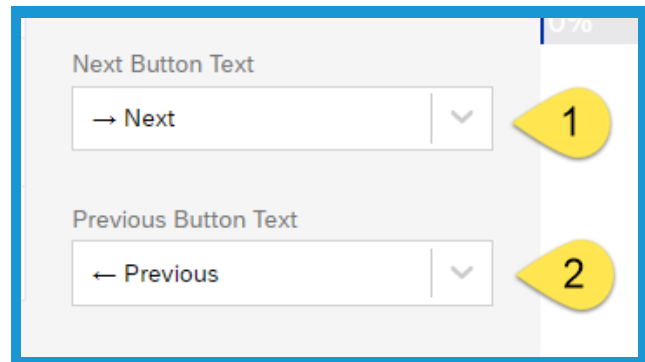


2. Select **General** on the left of the new window. This option should be selected by default.

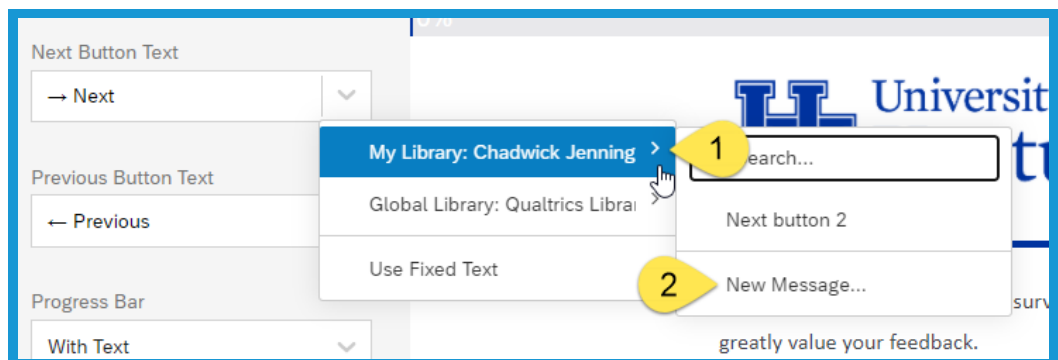


Section 1b: Look & Feel - Next and Previous Buttons

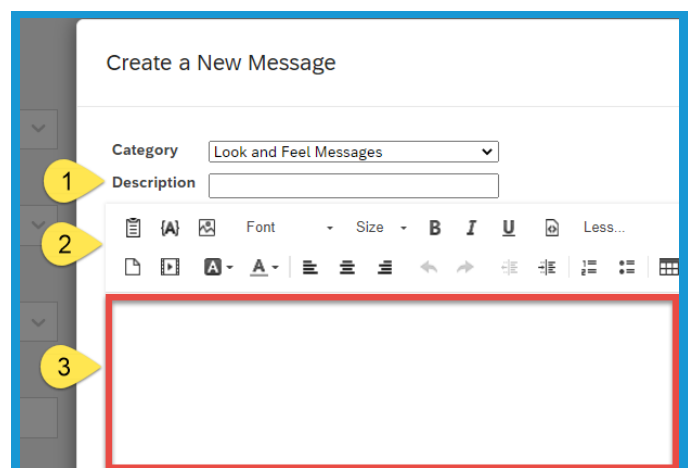
3. Select the **dropdown menu** to the **right** of the **Next** or **Previous Button Text**.



4. Place your mouse over **My Library (1)** and then click **New Message (2)**.

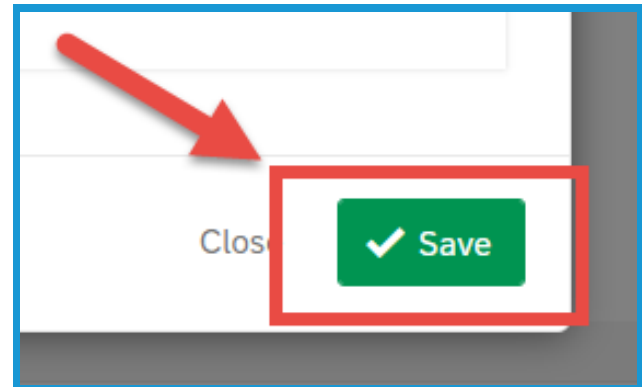


5. Provide your new button a **Description (1)**. This is how you will find it in the My Library section. Use the **text toolbar (2)** to modify the text. Type the message in the **textbox (3)**.

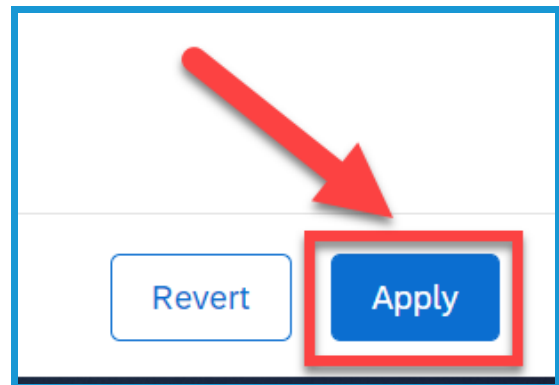


Section 1b: Look & Feel - Next and Previous Buttons

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

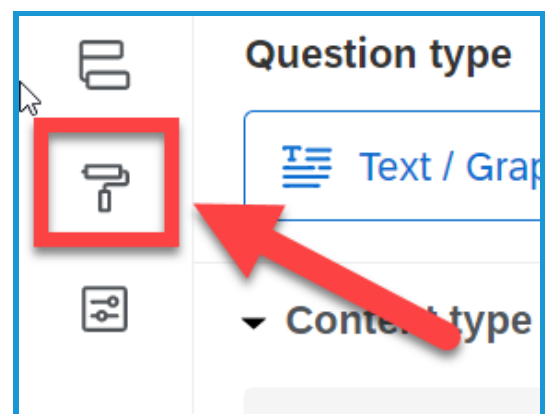


7. Click **Apply** in the lower right corner.



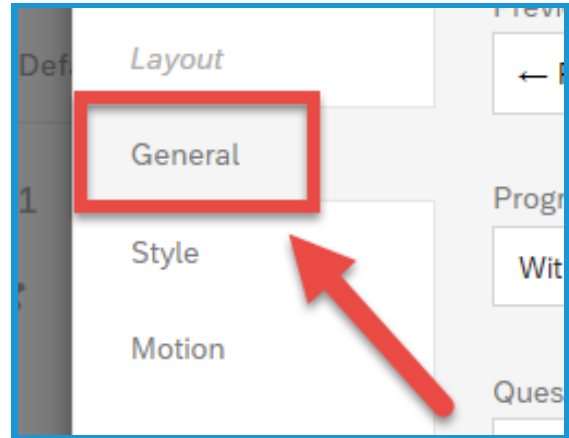
Section 1c: Look & Feel - Progress Bar

1. Select the **Look & Feel** button at the top left corner of the survey edit screen.

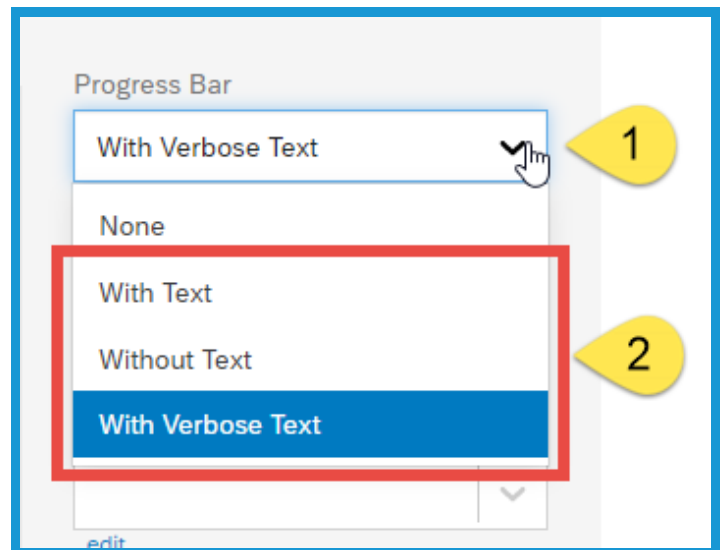


Section 1c: Look & Feel - Progress Bar

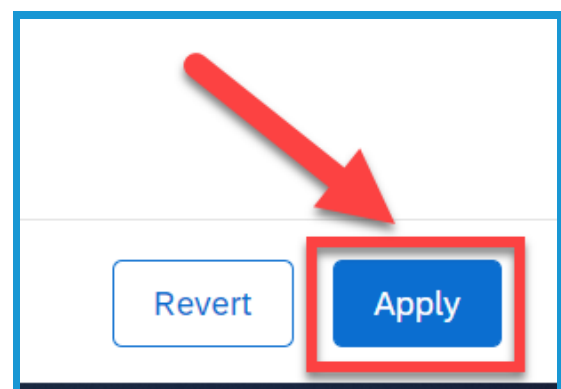
2. Select **General** on the left of the new window. This option should be selected by default.



3. Click the dropdown menu under Progress Bar. **With Text** will put **0% to 100%** in the bar. **With Verbose Text** will place "**Survey Completion**" in the middle of the bar.

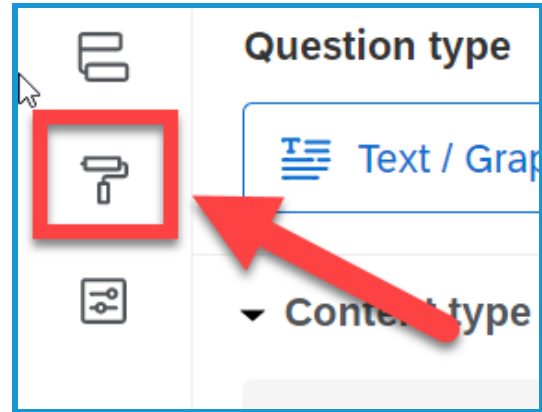


4. Click **Apply** in the lower right corner.

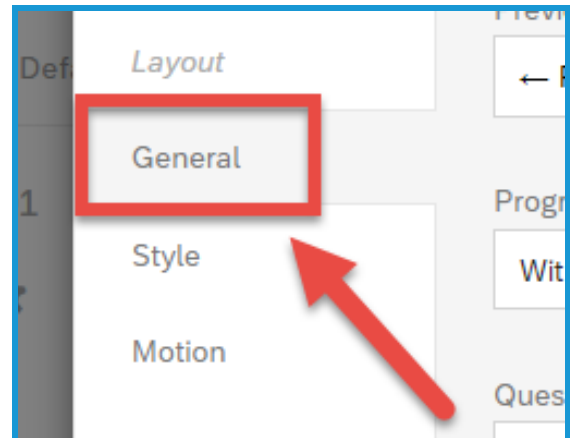


Section 1d: Look & Feel - Questions Per Page

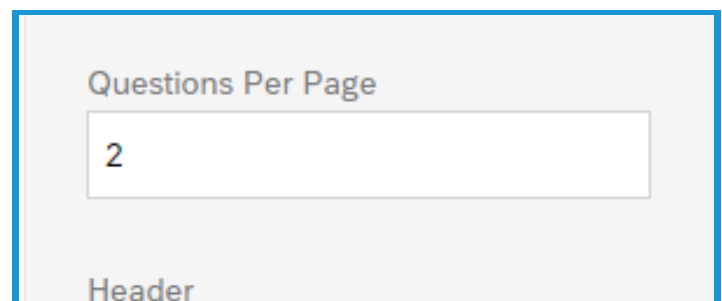
1. Select the **Look & Feel** button at the top left corner of the survey edit screen.



2. Select **General** on the left of the new window. This option should be selected by default.

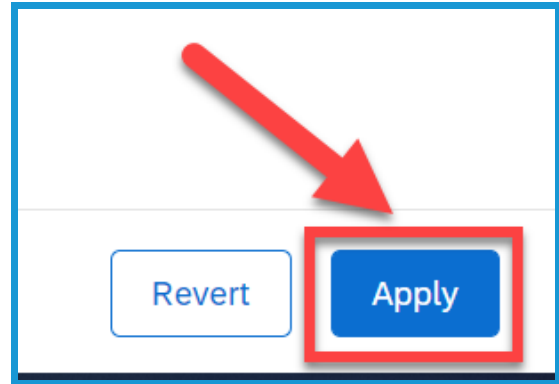


3. Put the number of questions to be displayed in the **Questions Per Page** field.



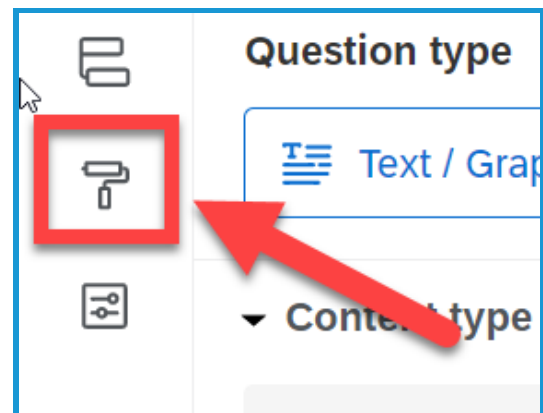
Section 1d: Look & Feel - Questions Per Page

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

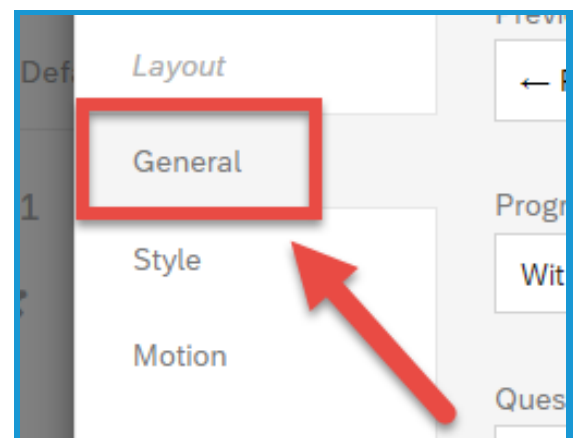


Section 1e: Look & Feel - Headers & Footers

1. Select the **Look & Feel** button at the top left corner of the survey edit screen.

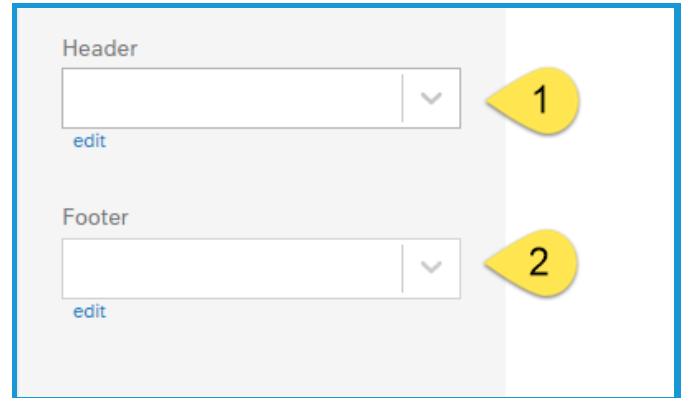


2. Select **General** on the left of the new window. This option should be selected by default.

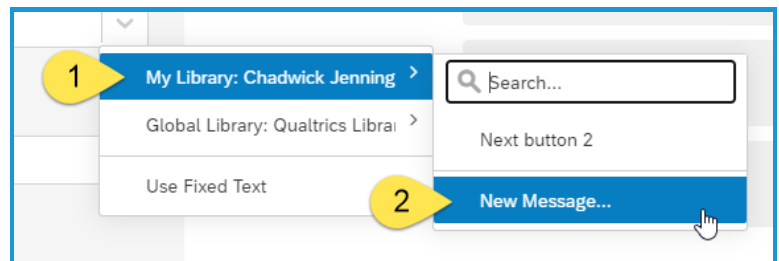


Section 1e: Look & Feel - Headers & Footers

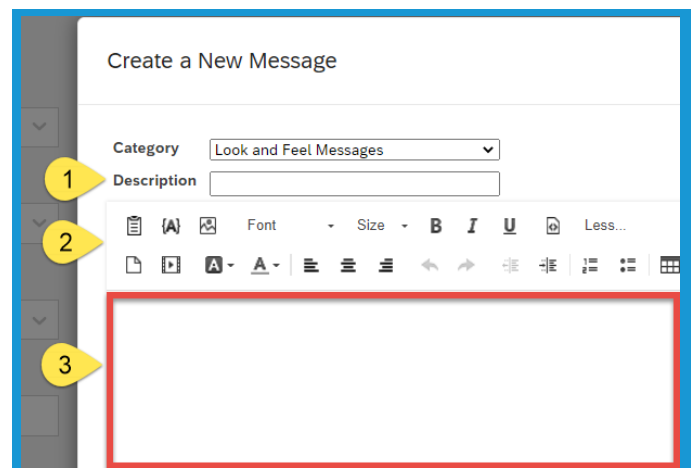
3. Click the **dropdown menu** under the **header** or **footer** options.



4. Place your mouse over **My Library (1)** and then click **New Message (2)**.

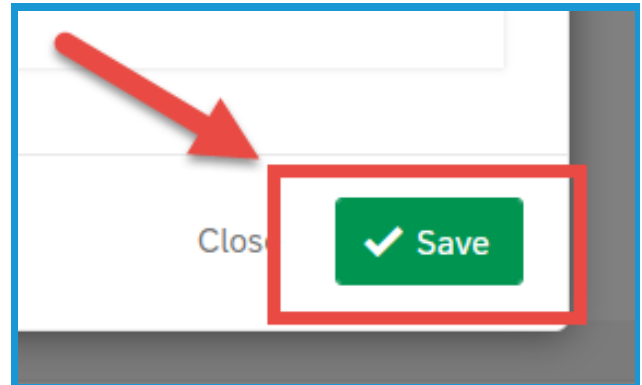


5. Give the header/footer a **Description (1)** which is how it will be labeled in the library. Use the **text toolbar (2)** to modify the text. Type the information in the **textbox (3)**.

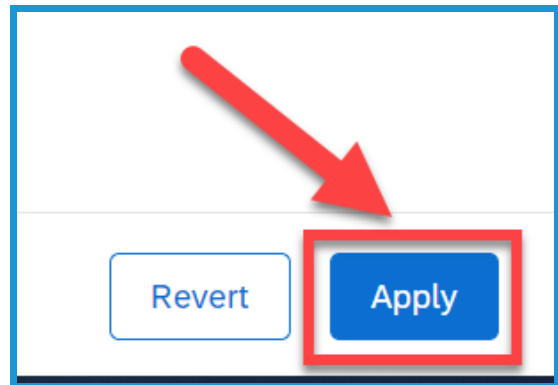


Section 1e: Look & Feel - Headers & Footers

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

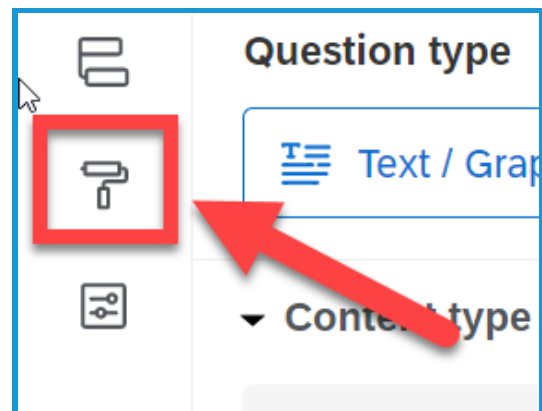


7. Click **Apply** in the lower right corner.



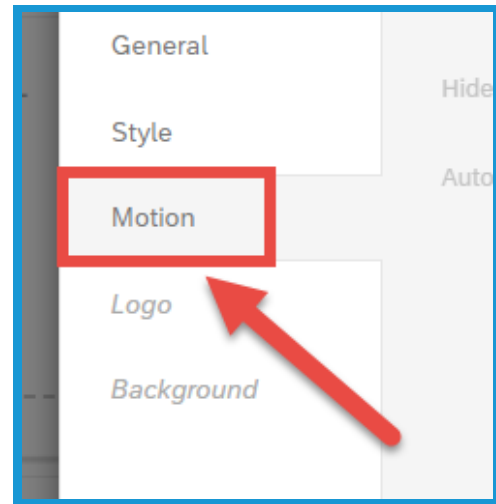
Section 1f: Look & Feel - Adding Motions

1. Select the **Look & Feel** button at the top left corner of the survey edit screen.

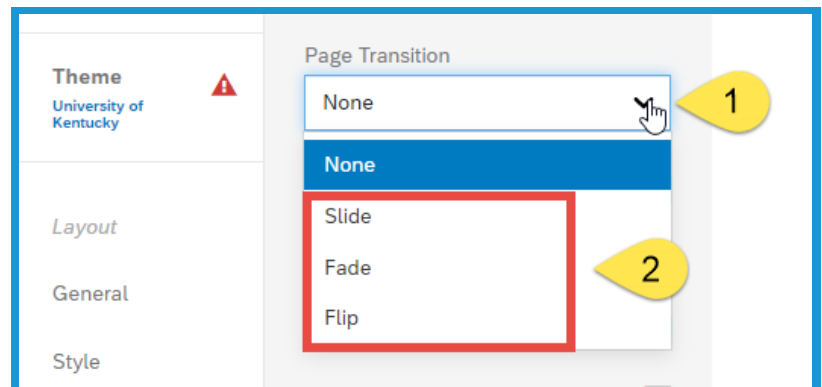


Section 1f: Look & Feel - Adding Motions

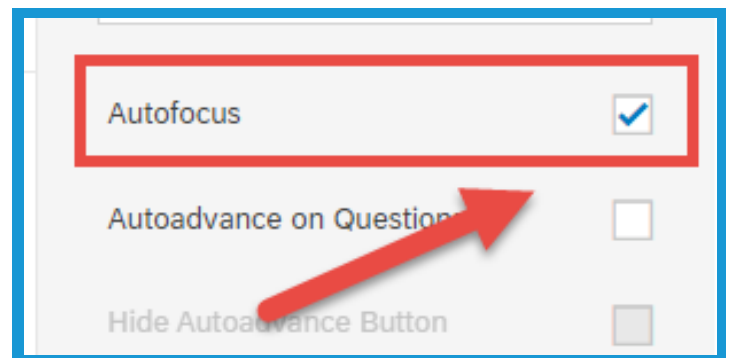
2. Select **Motion** on the left of the new window.



3. Click the **dropdown menu** under **Page Transition** to select **one of the three options** that are available.

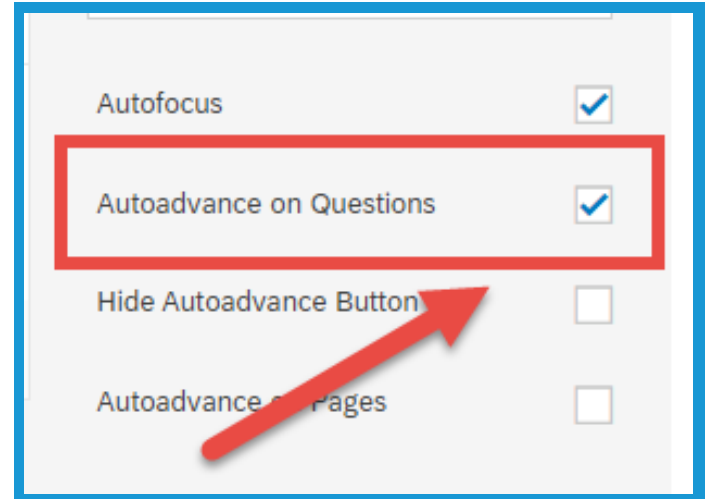


4. Check **Autofocus** to have only the question being answered be in focus. All other questions will be blurred.



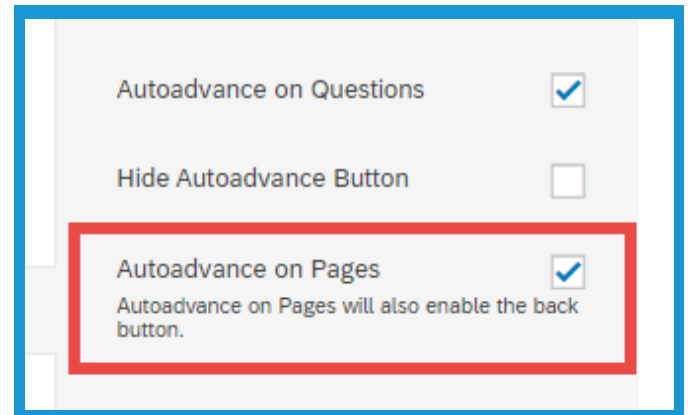
Section 1f: Look & Feel - Adding Motions

5. Select **Autoadvance on Questions** to let respondents advance past questions without scrolling the page. This will create a **Done button** that users can click to automatically advance to the next question as soon as they select an answer.



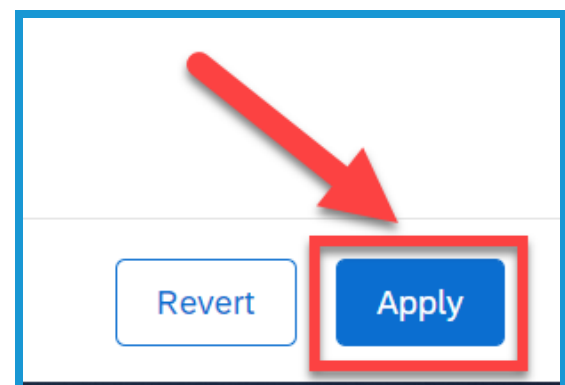
A screenshot of the Qualtrics settings interface. The 'Autofocus' checkbox is checked. The 'Autoadvance on Questions' checkbox is checked and highlighted with a red rectangle. A red arrow points to the 'Autoadvance on Questions' checkbox. The 'Hide Autoadvance Button' checkbox is unchecked. The 'Autoadvance on Pages' checkbox is unchecked.

6. Select **Autoadvance on Pages** to let respondents advance past pages without clicking a Next button. Instead, they will go to the next page as soon as they select an answer to the last question on the page.



A screenshot of the Qualtrics settings interface. The 'Autoadvance on Questions' checkbox is checked. The 'Hide Autoadvance Button' checkbox is unchecked. The 'Autoadvance on Pages' checkbox is checked and highlighted with a red rectangle. Below the 'Autoadvance on Pages' checkbox, the text 'Autoadvance on Pages will also enable the back button.' is visible.

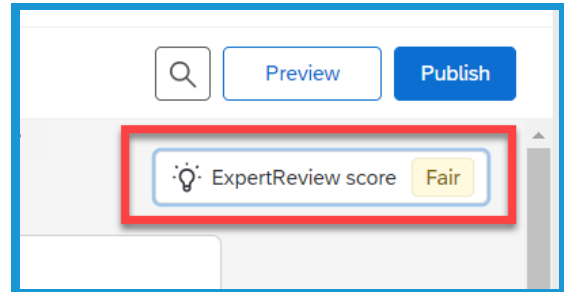
7. Click **Apply** in the lower right corner.



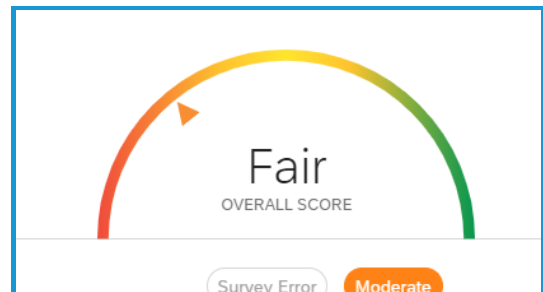
A screenshot of the Qualtrics settings interface showing the 'Revert' and 'Apply' buttons. The 'Apply' button is highlighted with a red rectangle. A red arrow points to the 'Apply' button.

Section 2: ExpertReview Score

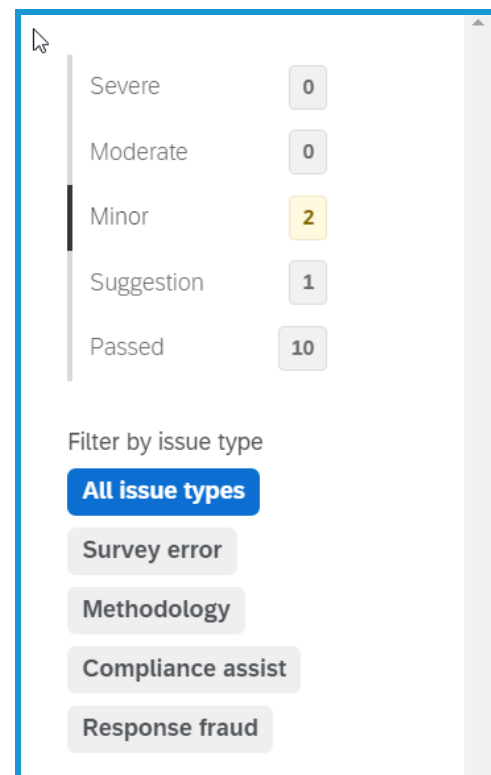
1. Select **ExpertReview Score** in the upper right corner of the survey edit screen.



2. In the **upper right corner** of the new window you will find the Overall Score of your survey.

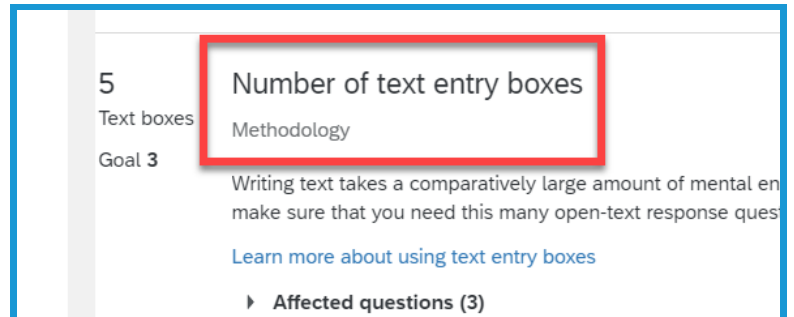


3. Click the **level of severity** on the left hand side of the screen to view the questions that fall into that category. You can also click on a **filter by issue type**.

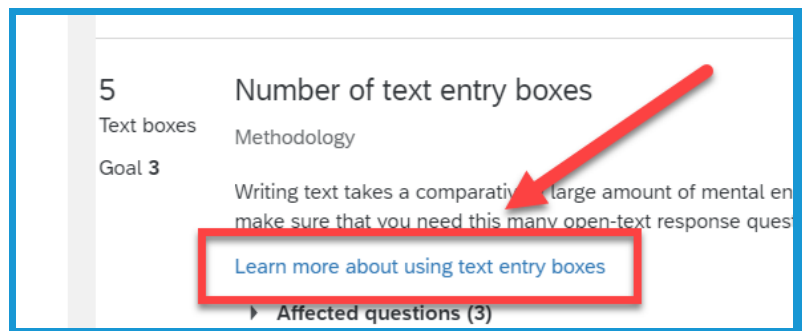


Section 2: ExpertReview Score

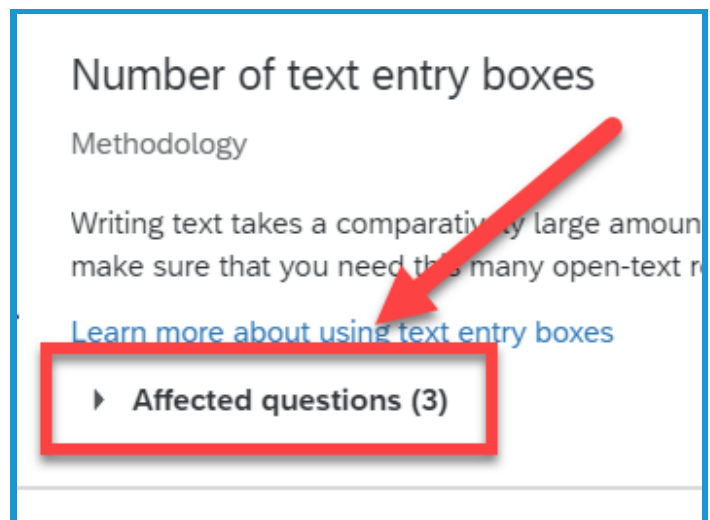
4. In the middle of the screen you will find the recommendation, and the suggestion on how to improve the survey.



5. Click the **Learn More** hyperlink to go the Qualtrics site to get further information on the suggestion.

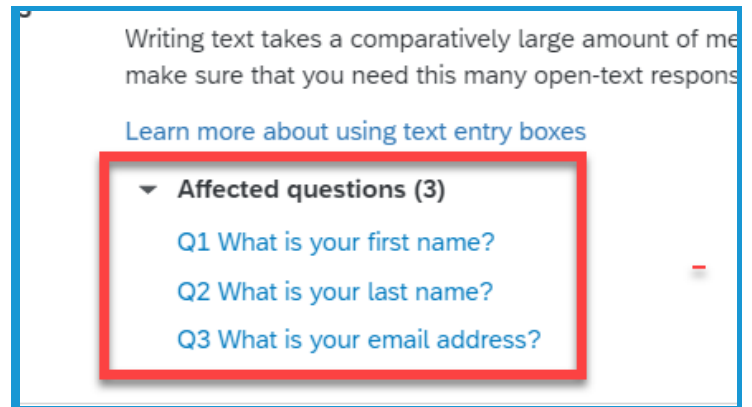


6. Click the **Affected Questions** dropdown menu to view the questions that can be improved.



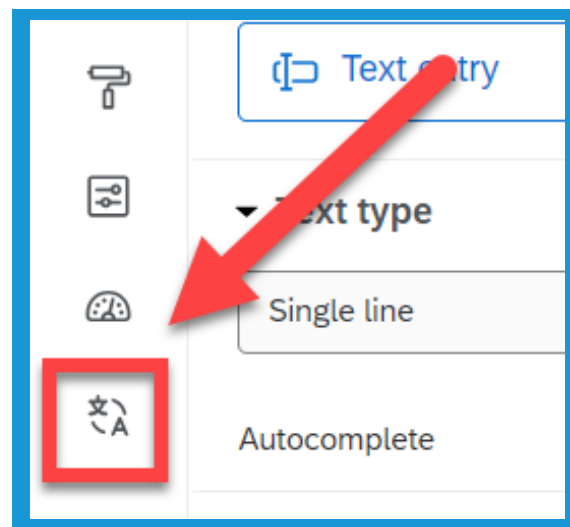
Section 2: ExpertReview Score

7. Click the **question** to navigate to the survey to work on the suggestion.

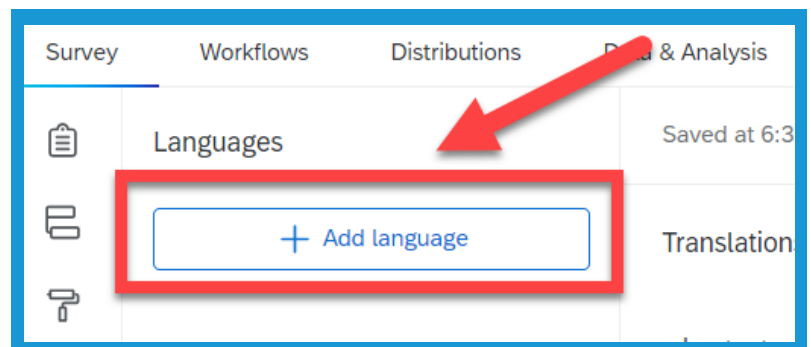


Section 3: Translation

1. Select the **Translation** button in the navigation menu on the left side of the Survey Builder screen.

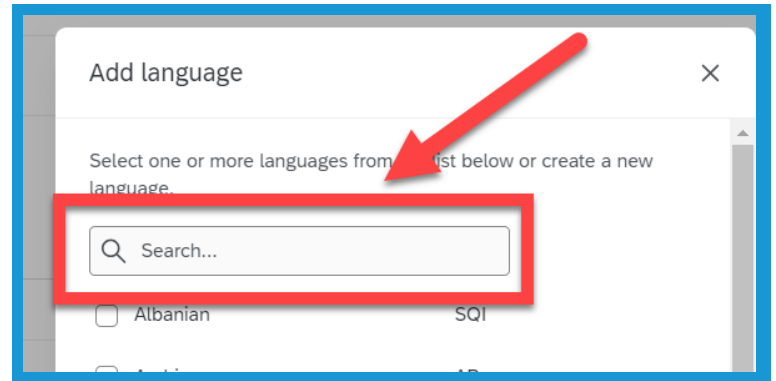


2. Click **Add Language** in the upper left corner of the Translation page.

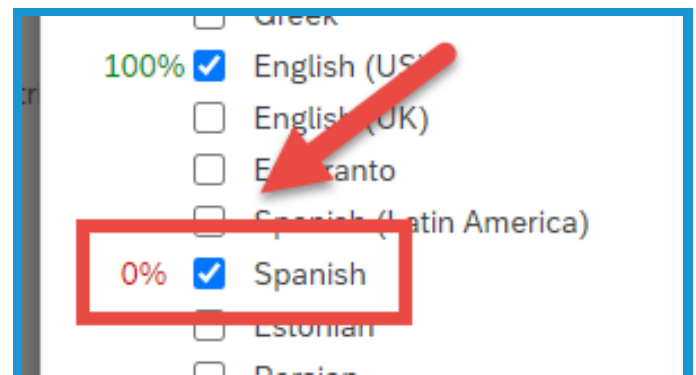


Section 3: Translation

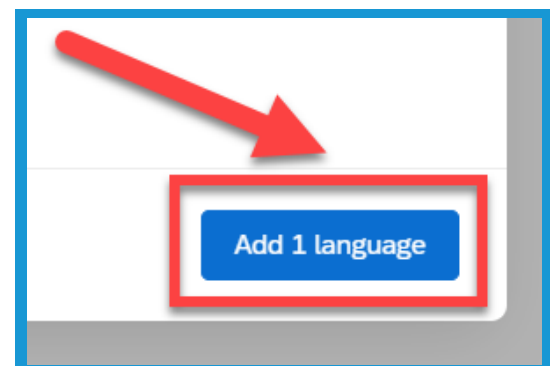
3. Use the **search engine** at the top of the Add language page to look for the desired language, or manually scroll through the menu.



4. Select the check box of the language you are wanting to translate your survey to.

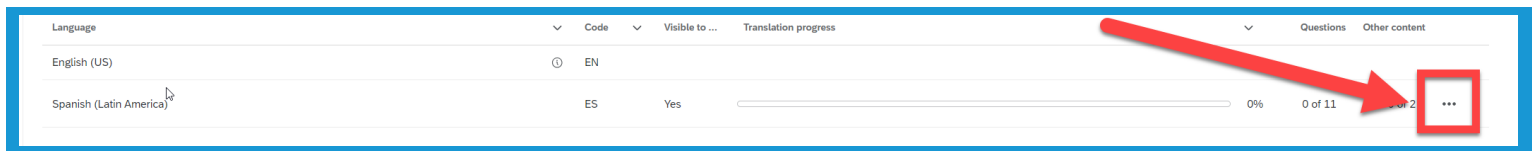


5. Click the **Add Language button** in the lower right.

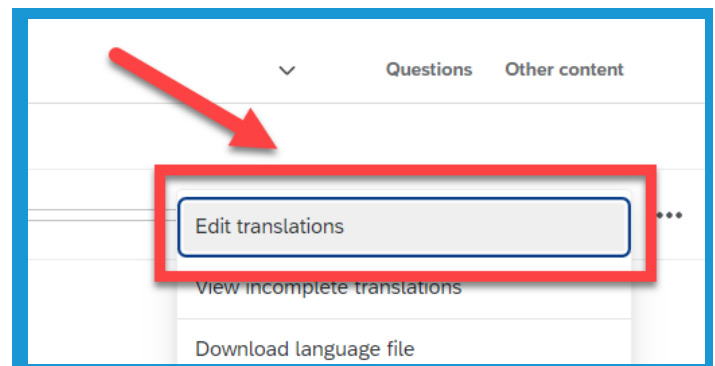


Section 3: Translation

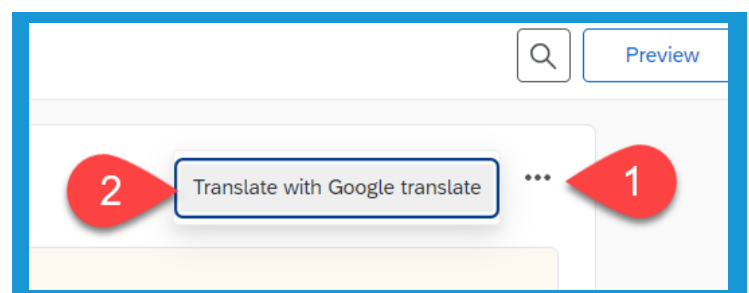
6. Click the **three dots** to the right of the added language.



7. Select **Edit Translations** in the new menu.

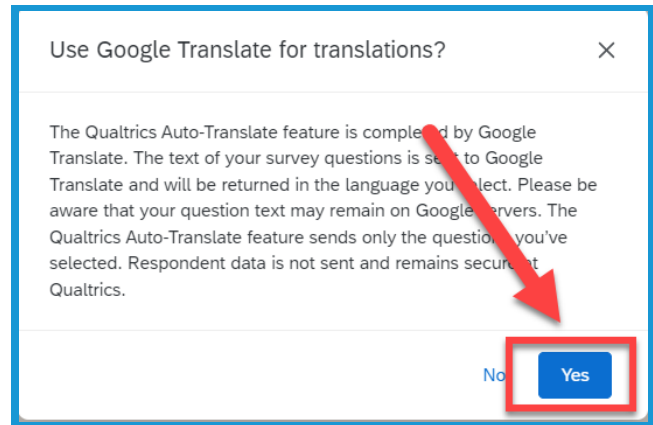


8. Select the **three dots** in the upper right corner of the translation page. Then click **Translate with Google translate**.

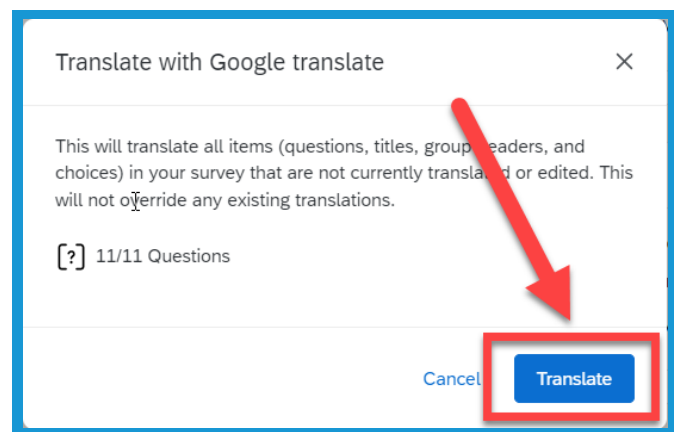


Section 3: Translation

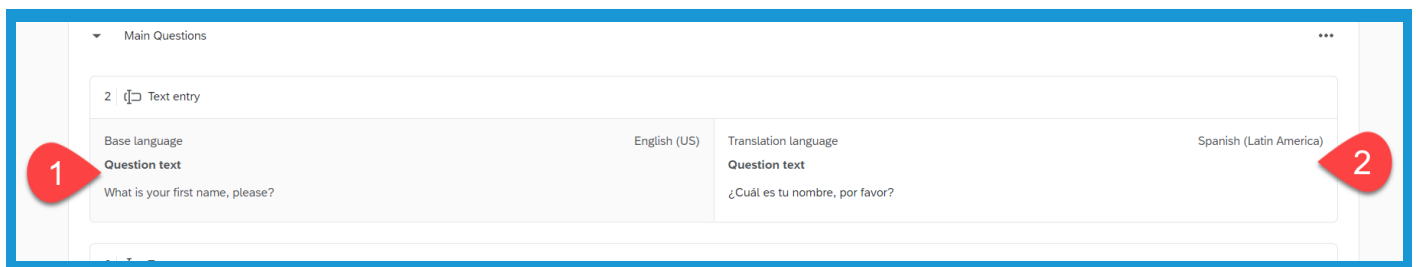
9. Click **Yes** in the new window.



10. Select **Translate** in the next window.

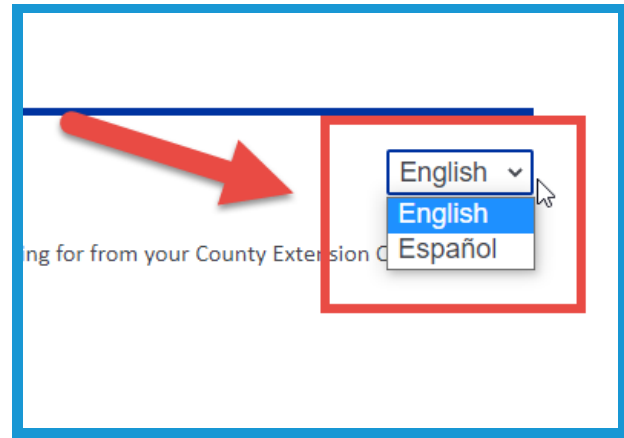


11. Once the translation is complete you will see the English version on the left side of the screen (1). The translated version will be on the right (2).



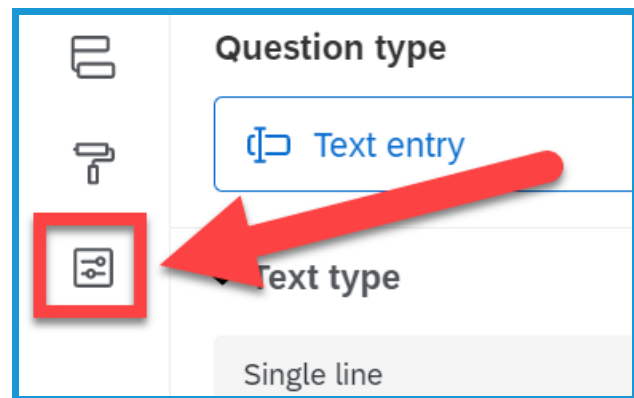
Section 3: Translation

12. Your survey will now have a **dropdown menu** to select the survey language.

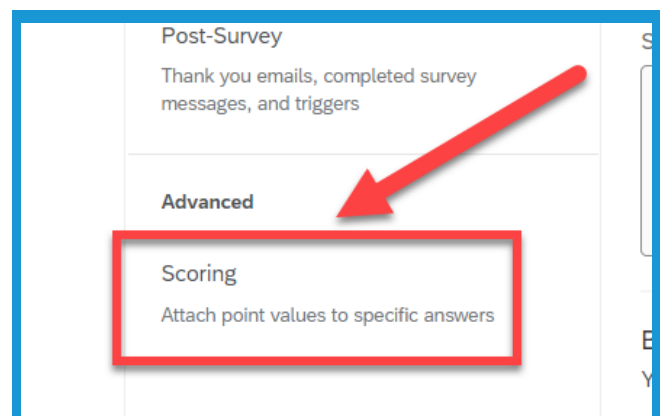


Section 4: Scoring

1. Select **Survey Options** in the top left of the screen.

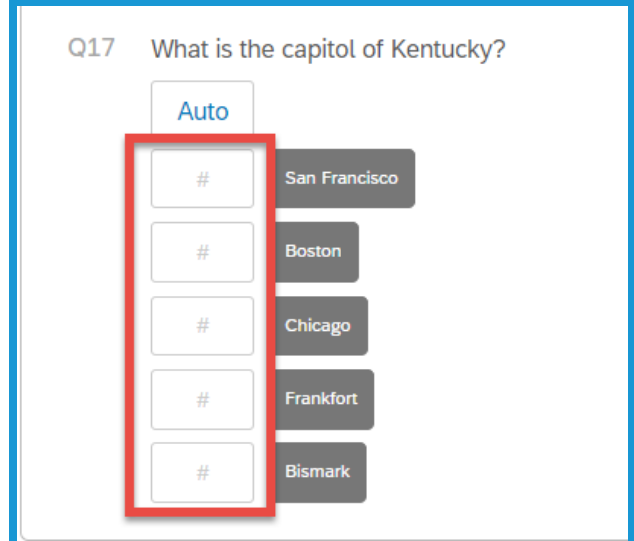


2. Select **Scoring** under the **Advanced section** in the menu on the left side of the screen.

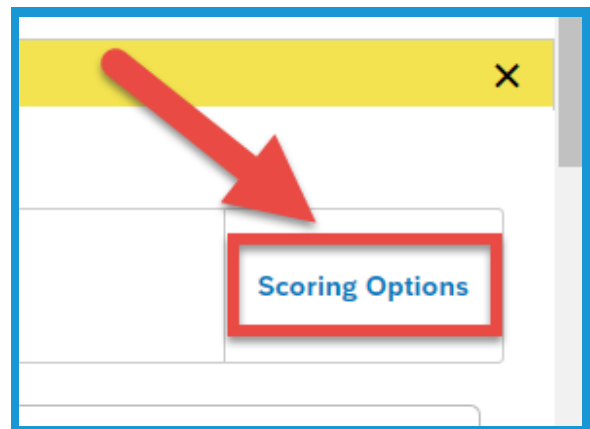


Section 4: Scoring

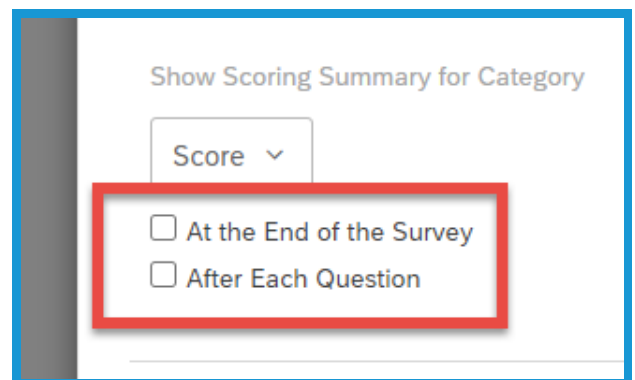
3. Place the point value for the answers in the fields to the left of the choices.



4. Select **Scoring Options** in the top right corner.

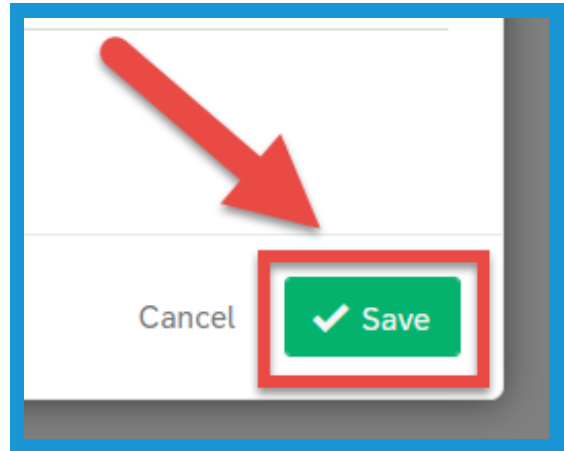


5. Under **Show Scoring Summary**, check one of the boxes if you want the respondents to see their scores **At the End of the Survey** or **After Each Question**.



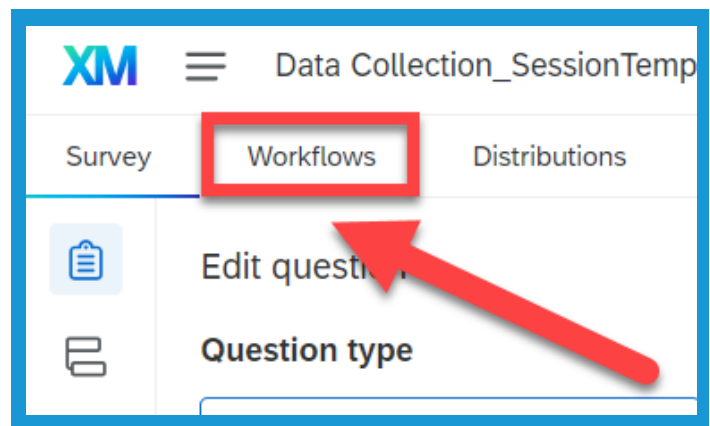
Section 4: Scoring

6. Click **Save** in the lower right.

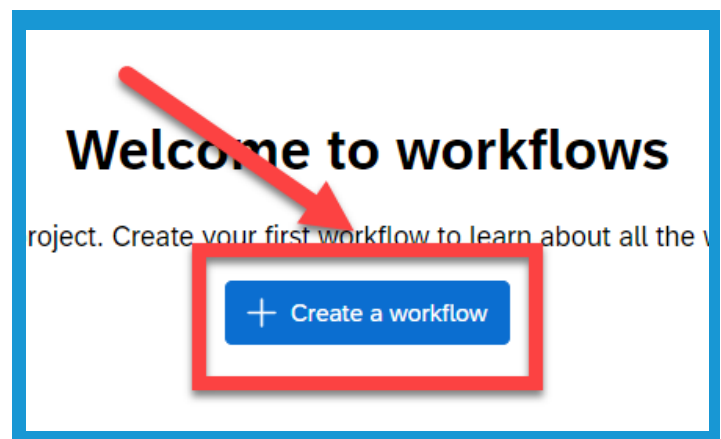


Section 5: Email Workflows

1. Click **Workflows** in the upper left corner of the project.

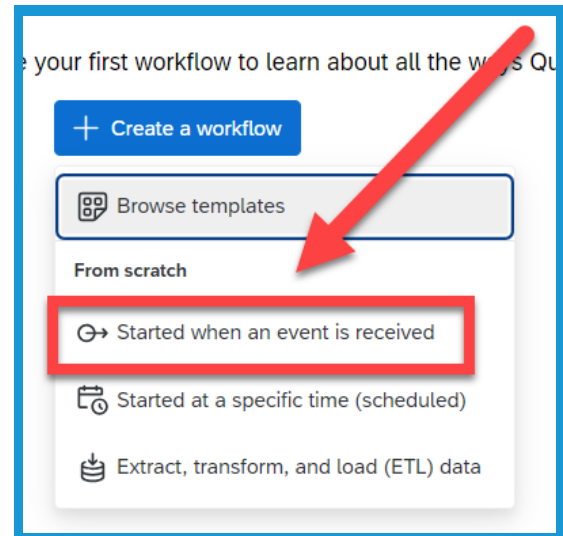


2. Click **Create a Workflows** in the center of the page.

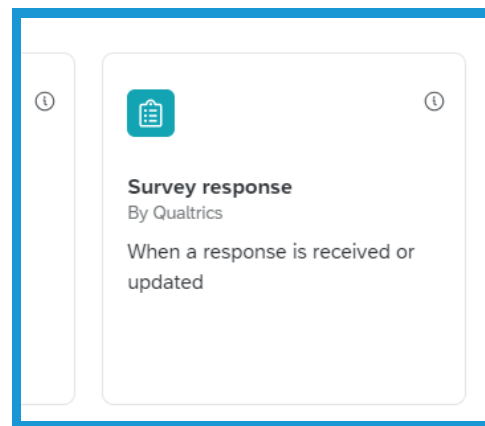


Section 5: Email Workflows

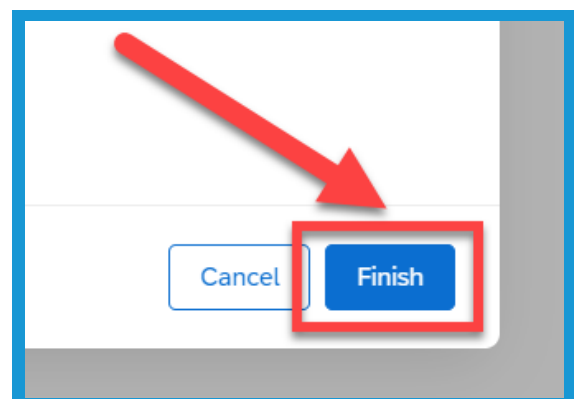
3. Select **Started when an event is received** in the dropdown menu.



4. Click **Survey response** on the new page.

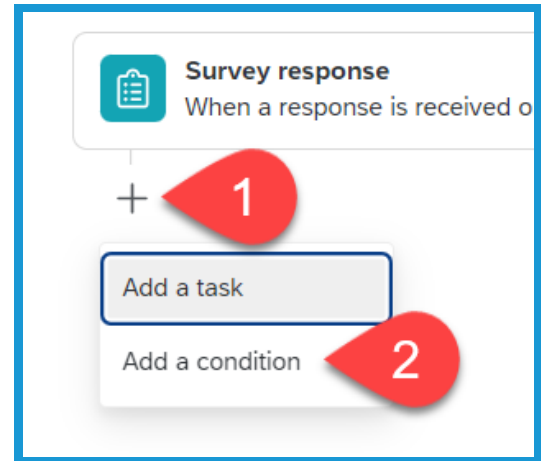


5. Click **Finish** in the bottom right corner of the window that appears.

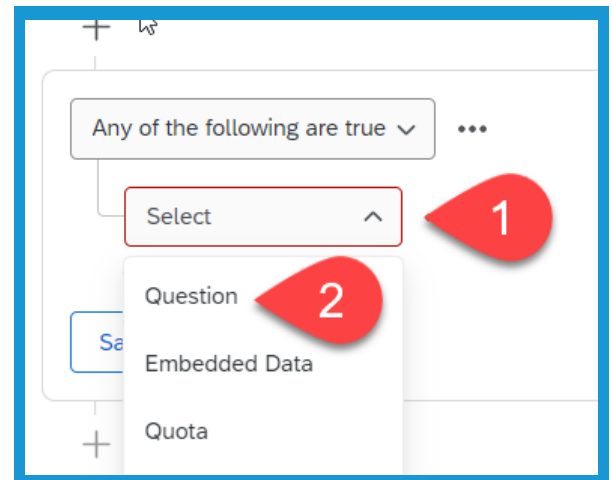


Section 5: Email Workflows

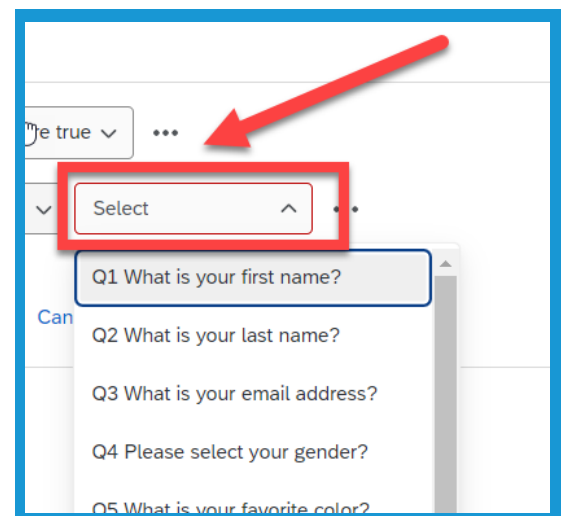
6. Click the **Plus** sign (1) underneath Survey response, and then select **Add a condition** (2).



7. Click the **Select** dropdown menu (1). Then select **Question** (2).

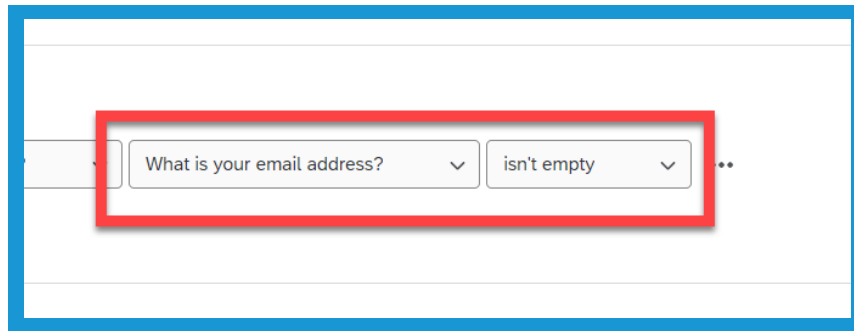


8. Click the **second Select dropdown menu** to choose which question will trigger the automatic email.

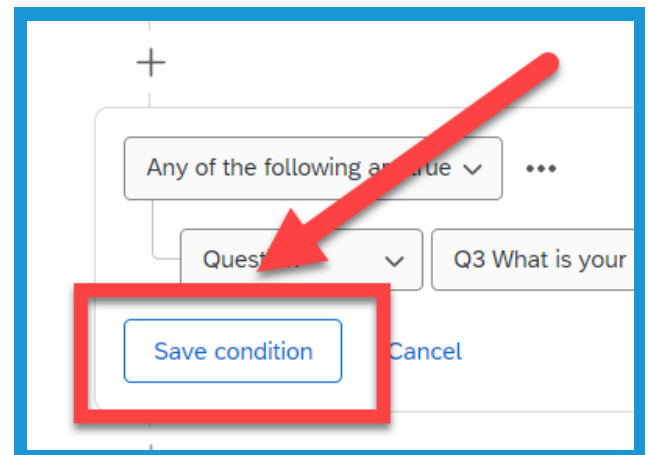


Section 5: Email Workflows

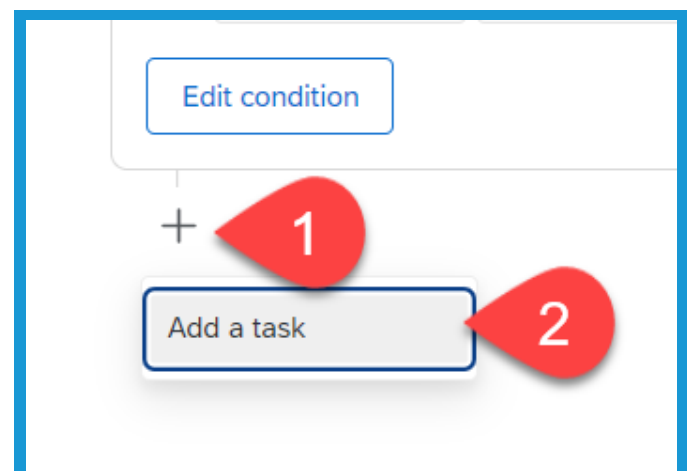
9. Use the remaining dropdowns to establish the rest of the condition that will activate the automatic email.



10. Click **Save Condition** in the lower left corner.

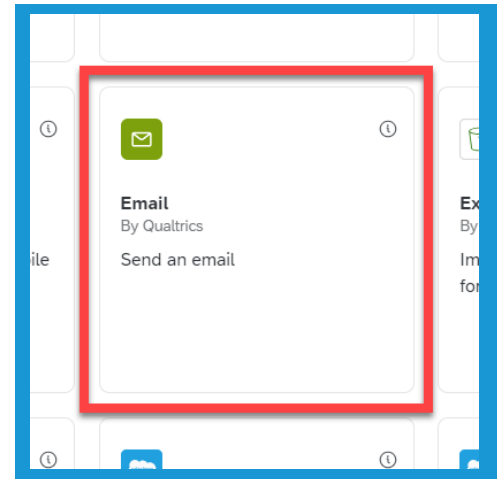


11. Click the **plus sign (1)** and the select **Add a task (2)**.

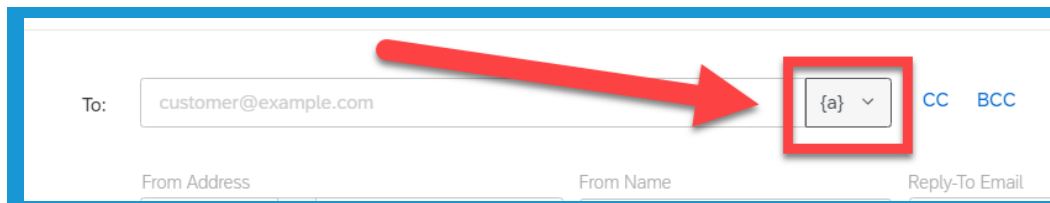


Section 5: Email Workflows

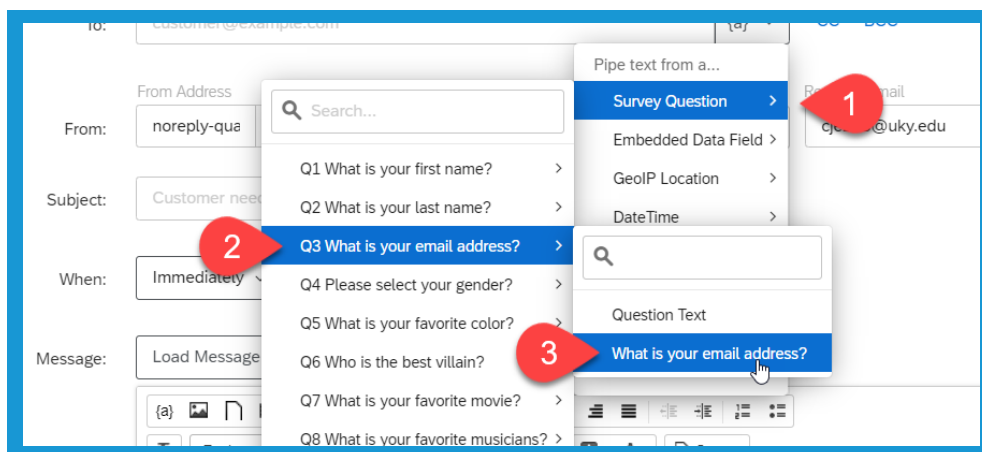
12. Select **Email** in the Task menu.



13. If you are sending the email to the person who entered their information click the **Piped Text** button to the right of the To field.

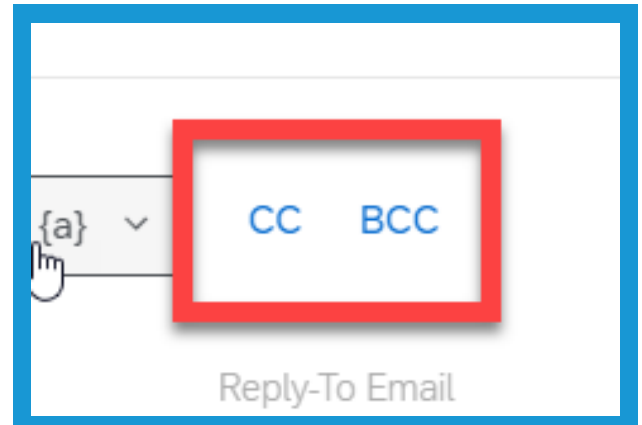


14. In the dropdown menu that appears, click **Survey Question (1)**. Then select the **email address question (2)** from your project, and then click on the **question again (3)**.

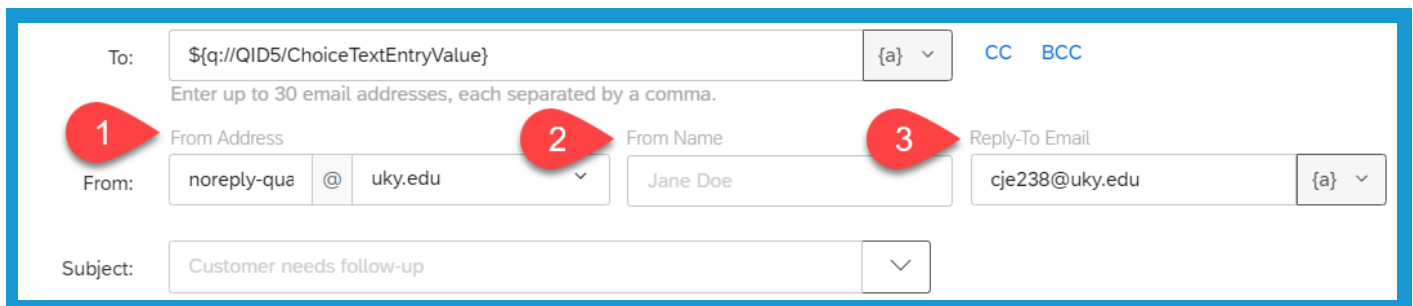


Section 5: Email Workflows

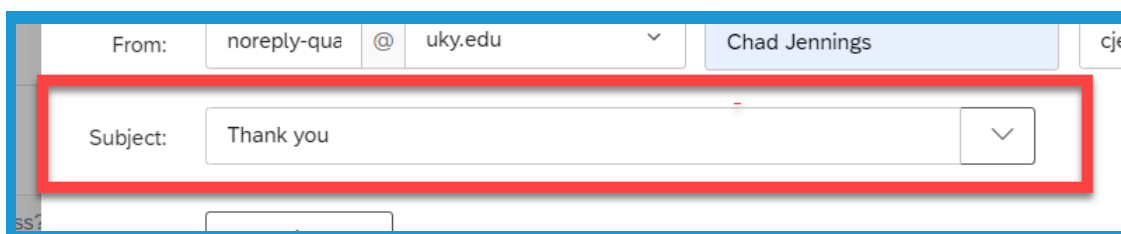
15. If an email needs to be sent to others select the CC or BCC button to enter the email address.



16. In the From section you can change the **From Address (1)**, **From Name (2)**, and **Reply-To Email (3)**.

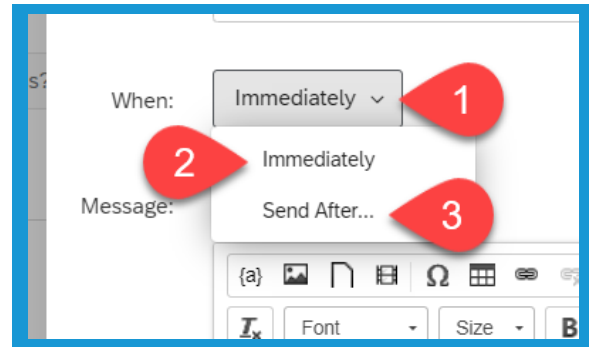
A screenshot of the email workflow interface. The 'To' field is at the top with a placeholder '{q://QID5/ChoiceTextEntryValue}' and a dropdown menu with '{a}' and a downward arrow. Below it are 'CC' and 'BCC' buttons. The 'From' section is highlighted with a blue border. It contains three fields: 'From Address' (labeled with a red circle 1), 'From Name' (labeled with a red circle 2), and 'Reply-To Email' (labeled with a red circle 3). The 'From Address' field contains 'noreply-qua' and '@ uky.edu'. The 'From Name' field contains 'Jane Doe'. The 'Reply-To Email' field contains 'cje238@uky.edu'. Below the 'From' section is the 'Subject' field with the text 'Customer needs follow-up' and a dropdown menu.

17. Enter a Subject in the provided field.

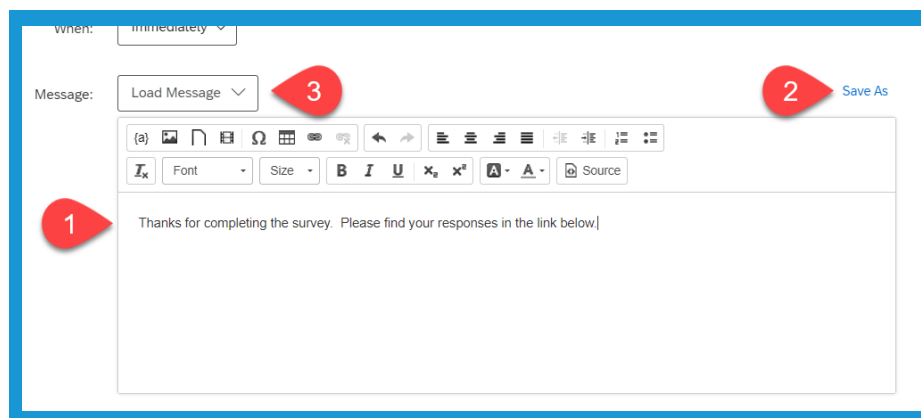
A screenshot of the email workflow interface. The 'From' section is at the top, showing 'From: noreply-qua @ uky.edu' and 'Chad Jennings'. Below it, the 'Subject' field is highlighted with a red rectangular box. The 'Subject' field contains the text 'Thank you' and a dropdown menu.

Section 5: Email Workflows

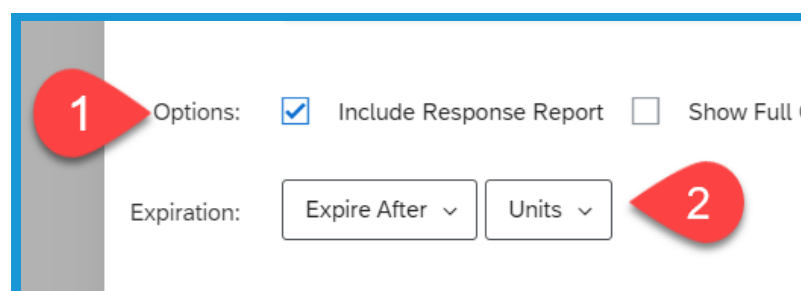
18. In the **When section (1)**, determine if you want to send the email **Immediately (2)** after the user completes the project or set a **certain send time (3)**.



19. In the **Message field (1)**, type the email the user will see upon receiving the message. You can also click **Save as (2)** to add the message to your library. Then in future projects, you can click the **Load Message dropdown (3)** to use the same email.

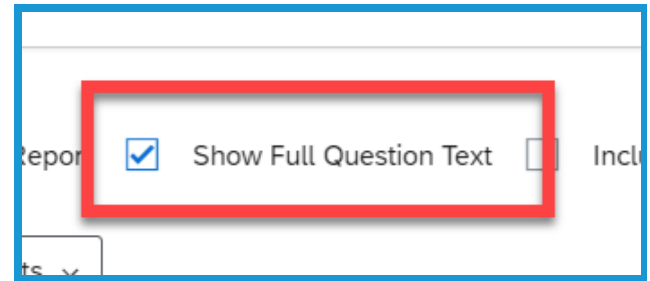


20. Next to Options at the bottom of the window, check the box next to **Include Response Report (1)** to add a link to a PDF copy of the user's information. If this box is checked you can also set an **expiration date (2)** for the PDF link.

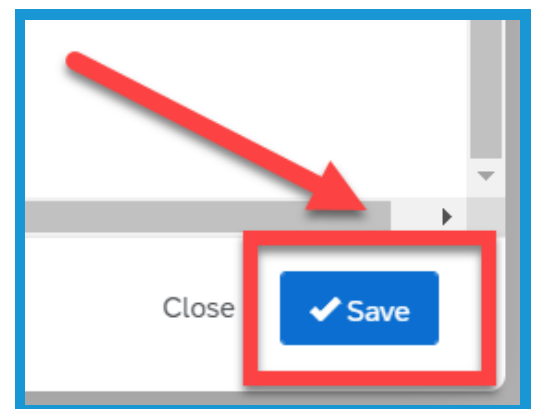


Section 5: Email Workflows

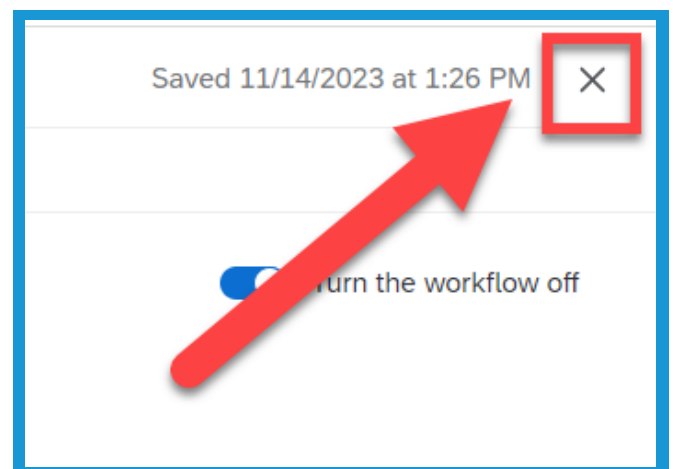
21. Click **Show Full Question Text checkbox** to include the question text in the email.



22. Click the **Save button** in the lower right corner to add the Email Task.



23. Click the **X button** in the upper right corner to return to the survey.





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

Qualtrics: Additional Features

**Any questions or training request:
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