



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

Qualtrics: Adding Logic & Advanced Survey Options

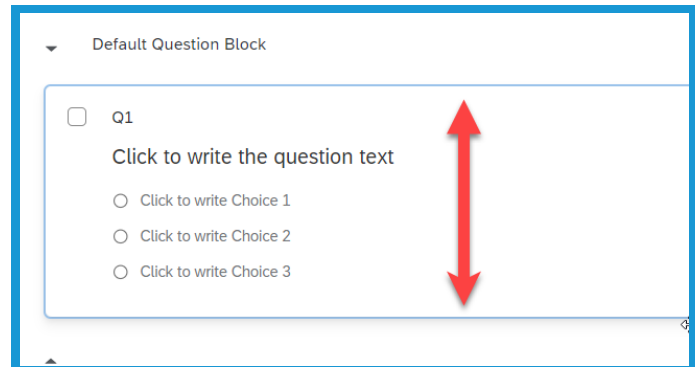
**Any questions or training request:
chad.jennings@uky.edu**

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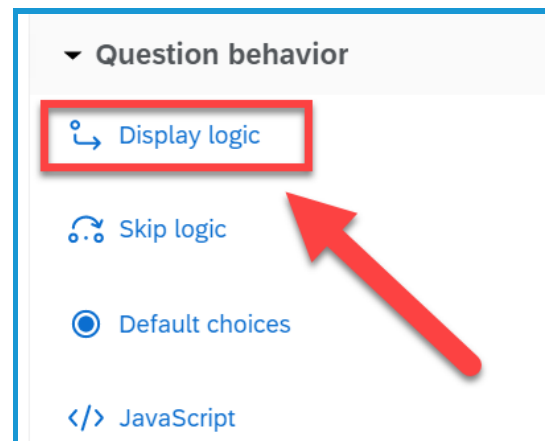
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Section 1: Display Logic

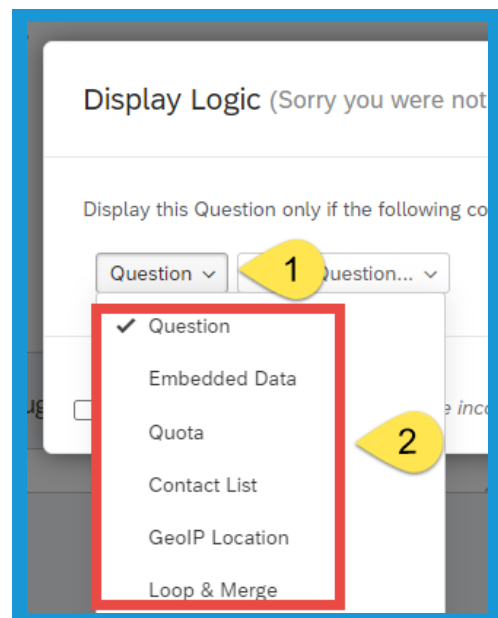
1. Click inside the question box, to turn the outline blue. Once you see the blue outline, the question is ready to be edited.



2. Select **Display Logic** under **Question behavior** located on the left side of the screen.

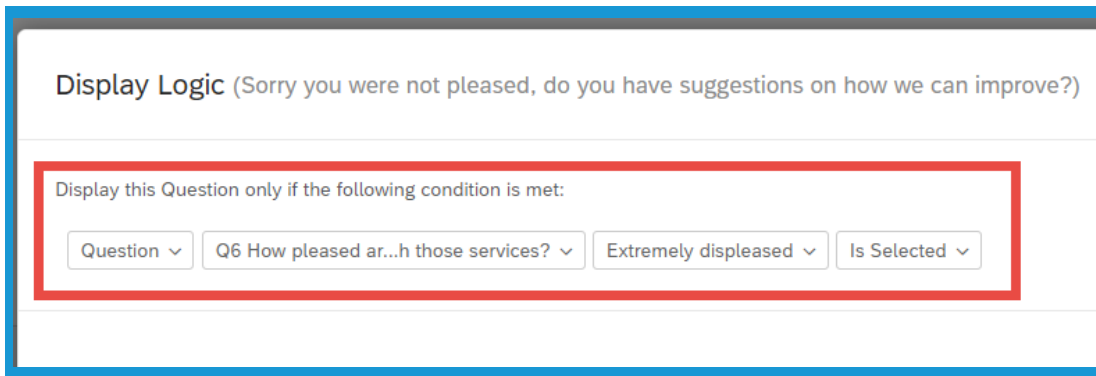


3. Select the **first dropdown menu (1)** to the left of the new window, and select the criteria you want to use **(2)**.

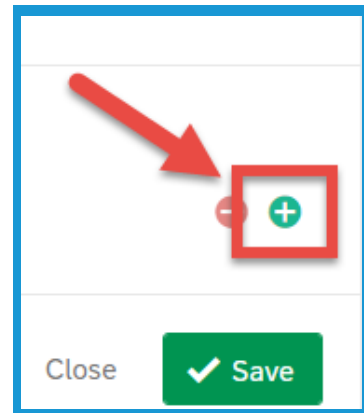


Section 1: Display Logic

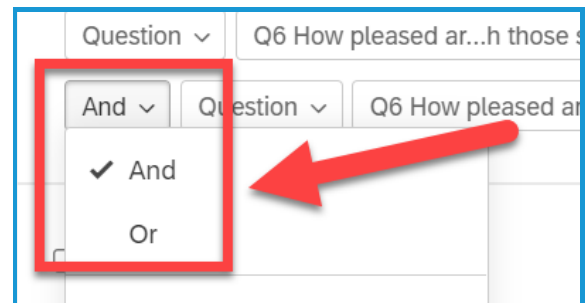
4. As you make your selection, various other dropdown menu's will appear. Select the needed criteria to achieve the needed effect.



5. Click the **green plus sign** to the right of the window to add additional lines of logic.

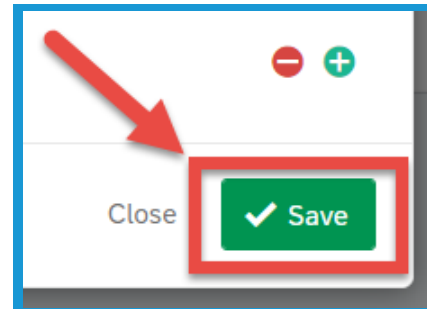


6. Any additional lines will have a dropdown menu appear to select between an **"And"** or **"Or"**. If **And** is selected all the logic will need to be completed to display the question. If **Or** is selected it can be any of the lines created.

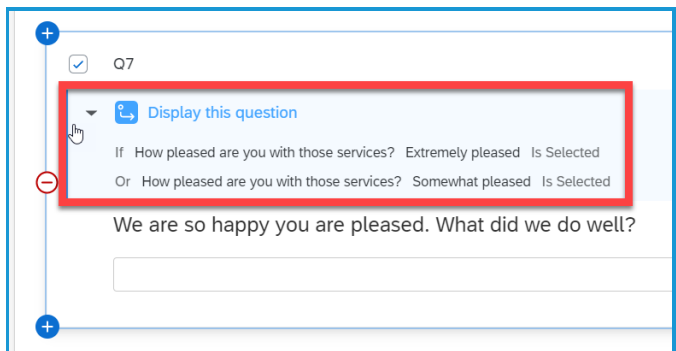


Section 1: Display Logic

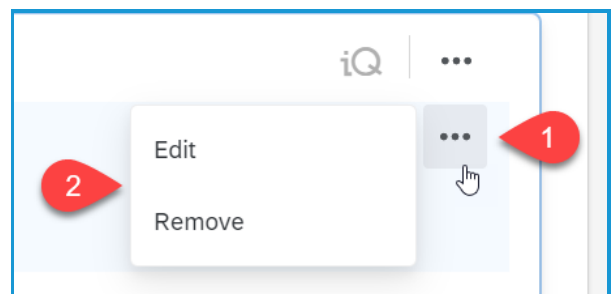
7. Click the **Save** button when the logic is created.



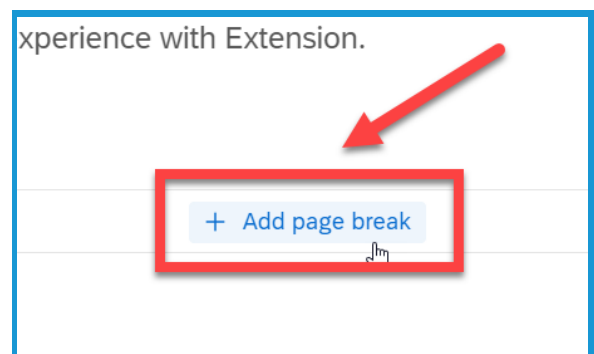
8. The logic you created will appear above the question.



9. Click the **three dots** to the right of the logic (1) to either **edit** or **remove** (2) the addition.

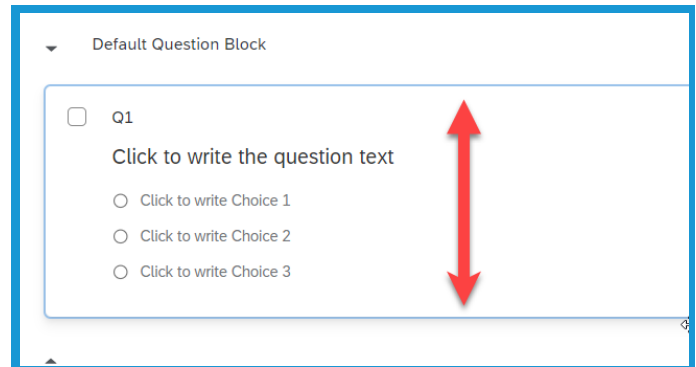


10. Ensure that there is a Page Break **before** the logic added. Place your mouse in the space between the question boxes, and select the **Add a Page Break** button that appears.

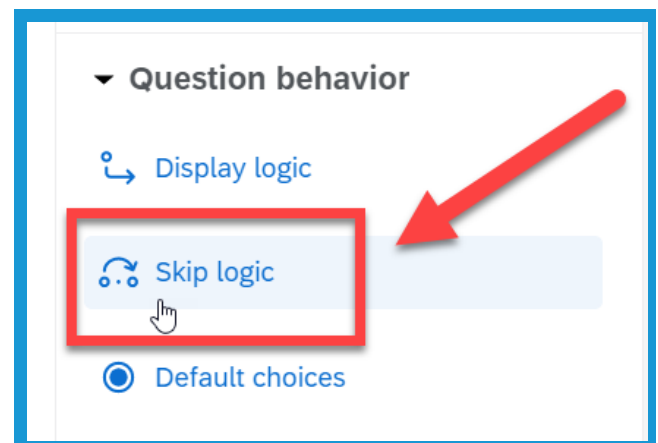


Section 2: Skip Logic

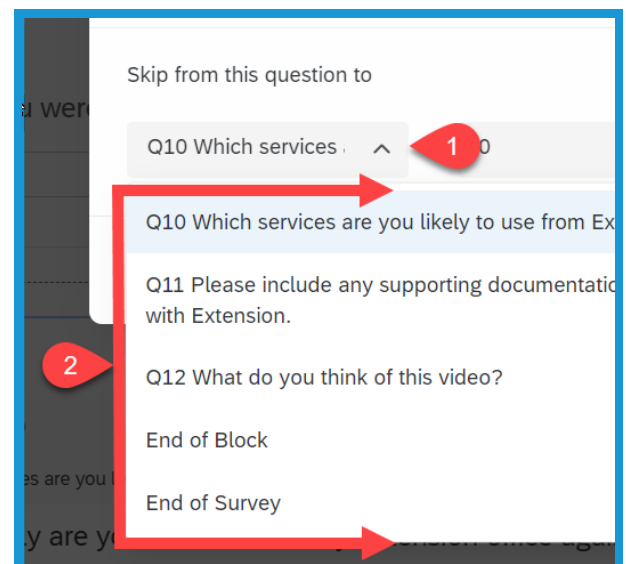
1. Click inside the question box, to turn the outline blue. Once you see the blue outline, the question is ready to be edited.



2. Select **Skip Logic** under **Question behavior** located on the left side of the screen.

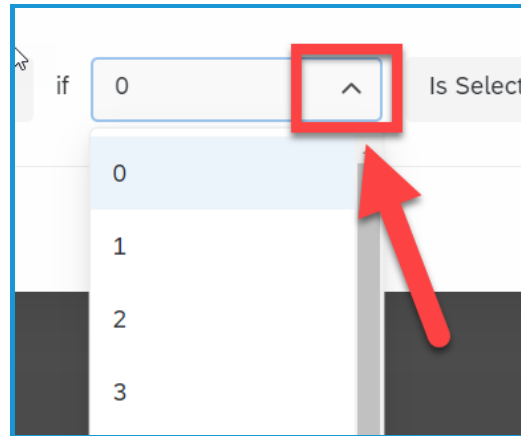


3. Select the **first dropdown menu (1)** in the new window to choose **where (2)** to skip the respondent. You can skip them to a future question, the end of the current block, or the end of survey.

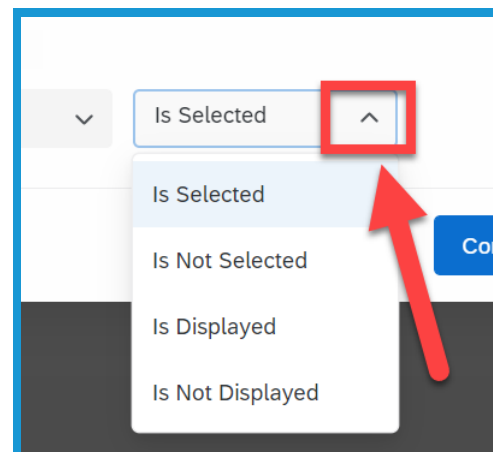


Section 2: Skip Logic

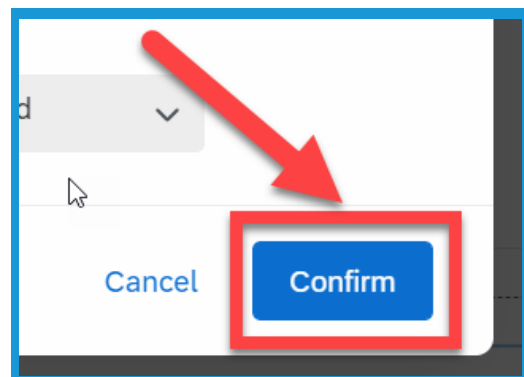
4. In the **second dropdown menu**, select the answer from the question that will trigger the skip.



5. In the **third dropdown menu** select the action the respondent will need to perform to trigger the skip.

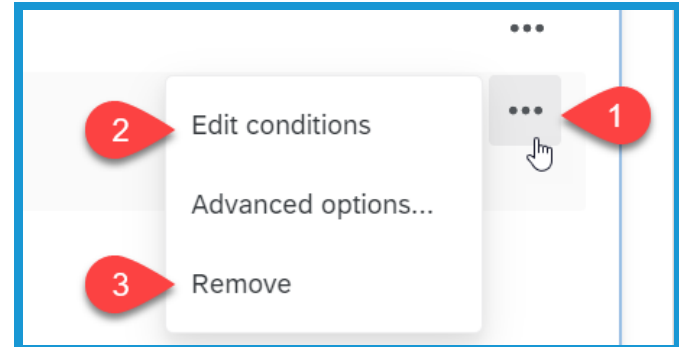


6. Select **Confirm** on the far right of the Skip Logic window to set the changes to the question.

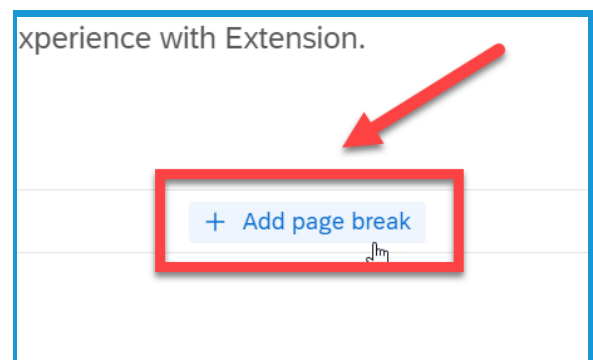


Section 2: Skip Logic

7. Click the **three dots (1)** to the right of the logic to either **edit (2)** or **remove (3)** the logic.

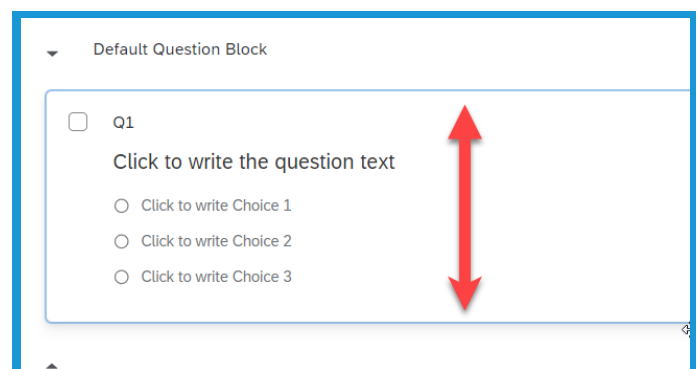


8. Ensure that there is a Page Break **after** the logic added. Place your mouse in the space between to question boxes, and select the **Add a Page Break** button that appears.



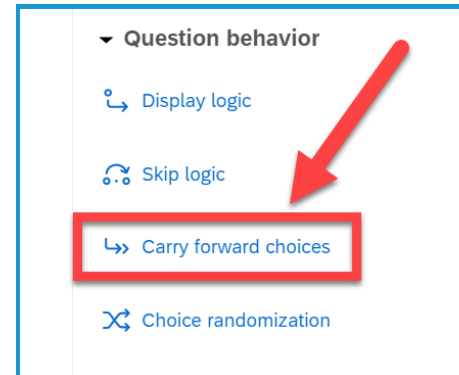
Section 3: Carry Forward

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

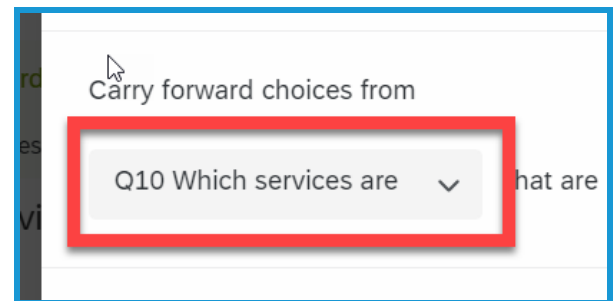


Section 3: Carry Forward

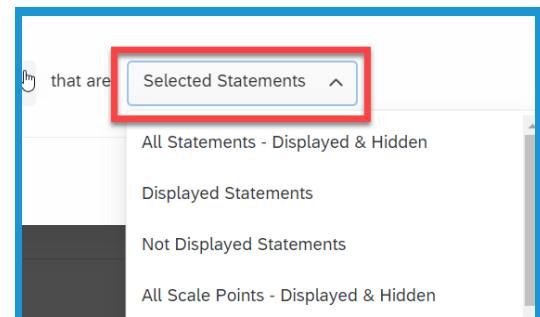
2. Select **Carry forward choices** under **Question behavior** located on the left side of the screen.



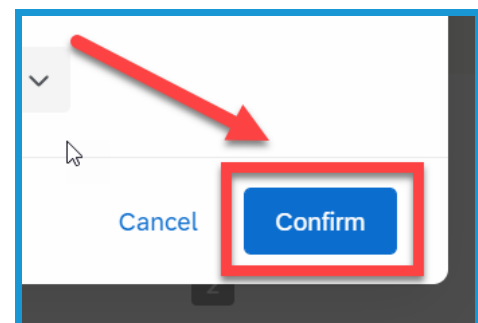
3. In the **first dropdown menu** select the question where you are pulling the **answer(s)** from to populate the new question



4. Click the **second dropdown menu** to pull the info from the question selected in the first dropdown. These options will change based on the type of question that was selected.

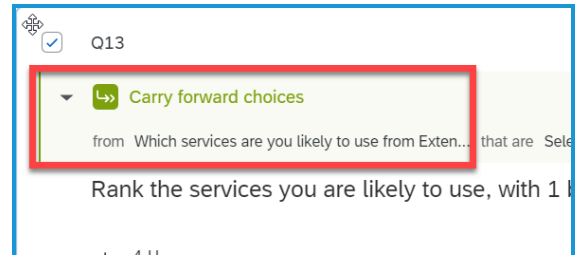


5. Click **Confirm** in the lower right of the field to confirm the changes to the question.

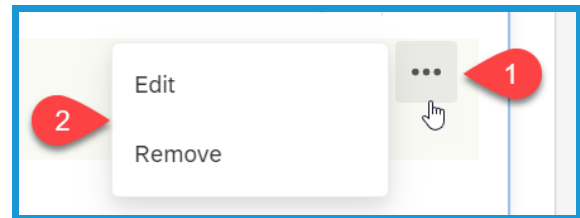


Section 3: Carry Forward

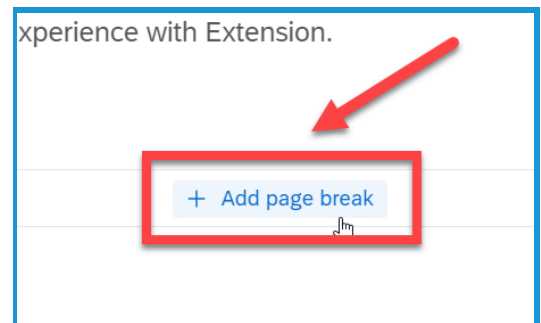
6. You can review the logic in the box above the question.



7. Click the **three dots** to the right of the Carry Forward field to either **edit** or **remove** the logic.

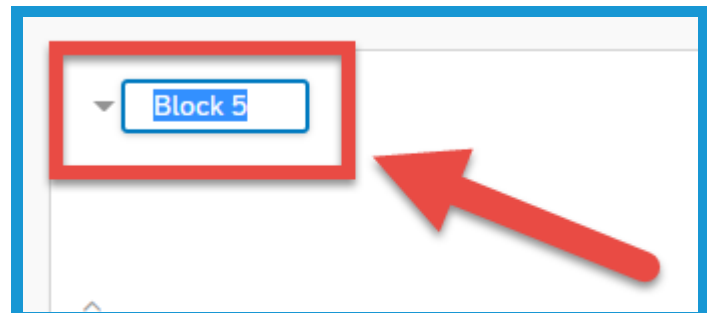


8. Ensure that there is a Page Break **before** the logic added. Place your mouse in the space between to question boxes, and select the **Add a Page Break** button that appears.



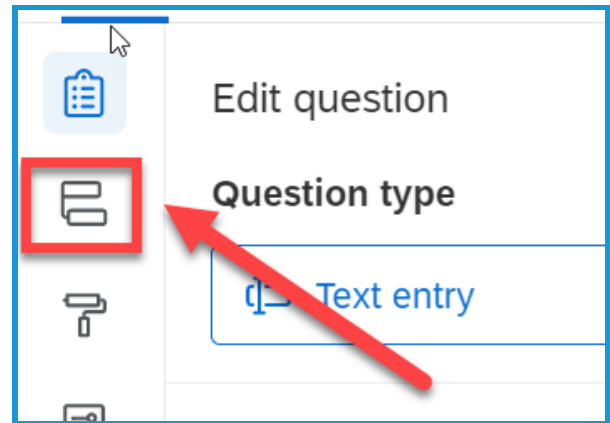
Section 4a: Survey Flow - Getting Started

1. **Before** editing the Survey Flow, we recommend naming the various blocks of questions. This will help you when identifying the correct areas to be edited. Name the blocks by **clicking** on the **generic block name** in the upper left corner, and typing in the needed text.

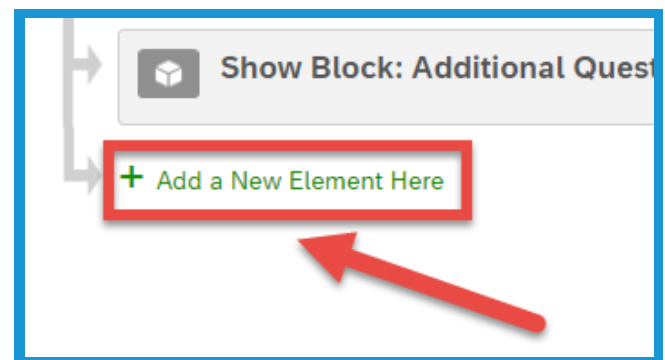


Section 4a: Survey Flow - Getting Started

2. Click the **Survey Flow** button in the upper left of the screen.

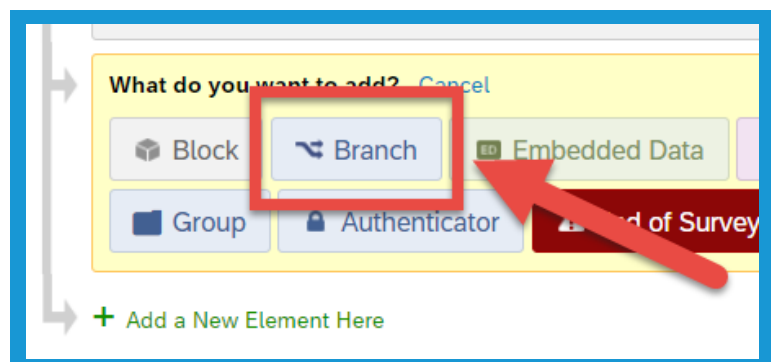


3. Click the green **Add a New Element Here** button at the bottom of the screen.



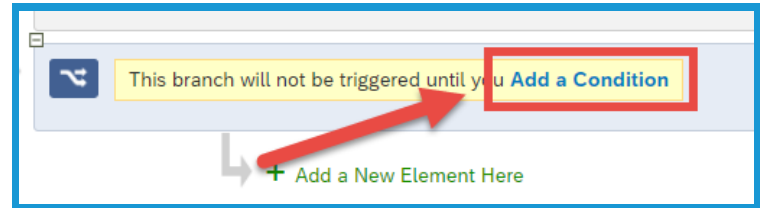
Section 4b: Survey Flow - Branching

1. After clicking the **Add a New Element Here** button, select **Branch** in the new menu.

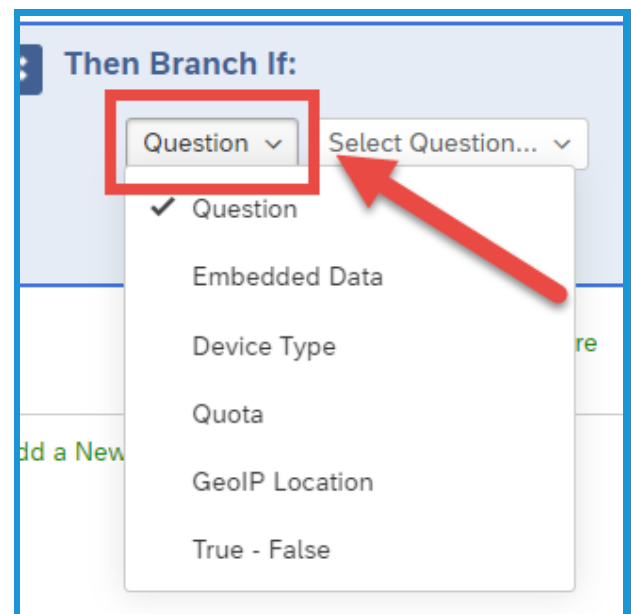


Section 4b: Survey Flow - Branching

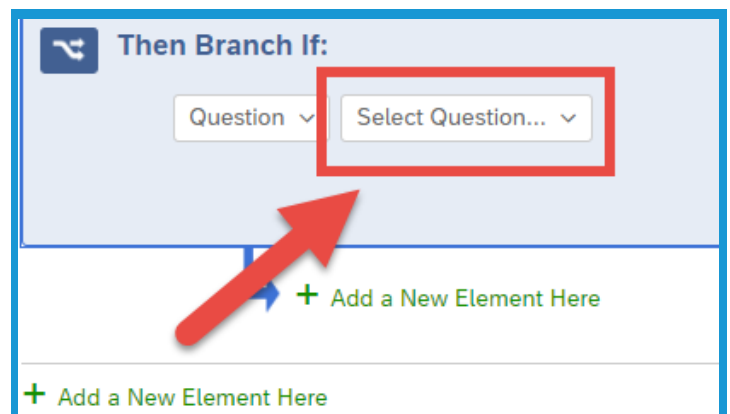
2. Click the blue **Add a Condition** button in the new branch box.



3. Click the **first dropdown menu** to select the option that you want your condition based on.

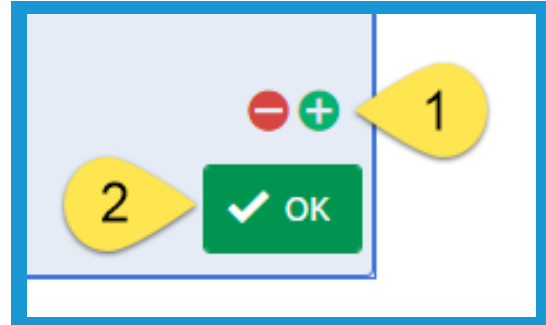


4. Select the **second dropdown menu** to choose the trigger for the condition. Please note that these steps may change based on the option selected in Step 3. Also, you may have additional dropdown menus based on the trigger chosen.

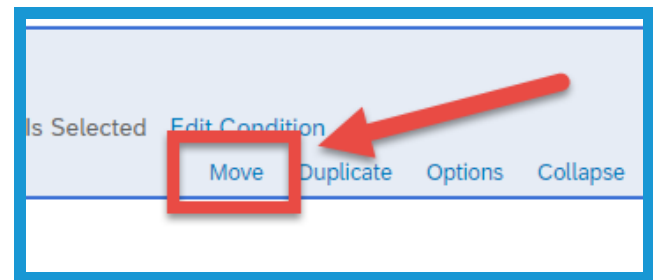


Section 4b: Survey Flow - Branching

5. Click the **plus** or **minus sign** (1) to add additional conditions or remove them. When the branch is completed, click the **OK** button (2).



6. **Left click** and **hold** the mouse on the **Move button** in the branch. You can now drag the new branch to the needed location.

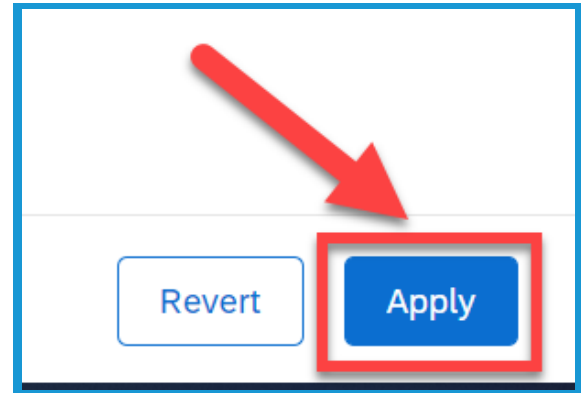


7. Drag a block of questions underneath the new branch by left clicking and holding the **Move button** in order to have those questions controlled by the new condition. If this move was done correctly your Survey Flow will appear as seen below.



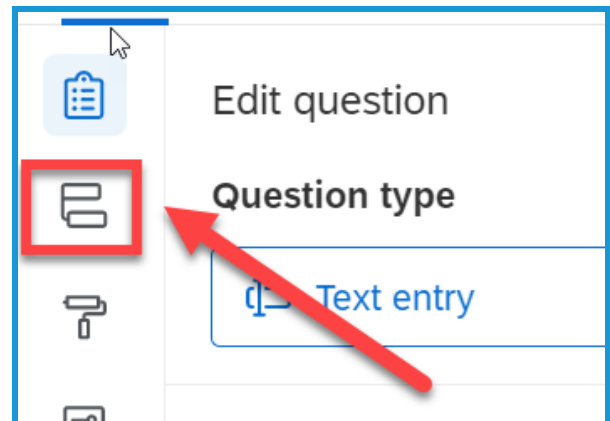
Section 4b: Survey Flow - Branching

8. Click **Apply** in the bottom right to confirm the changes to the Survey Flow.

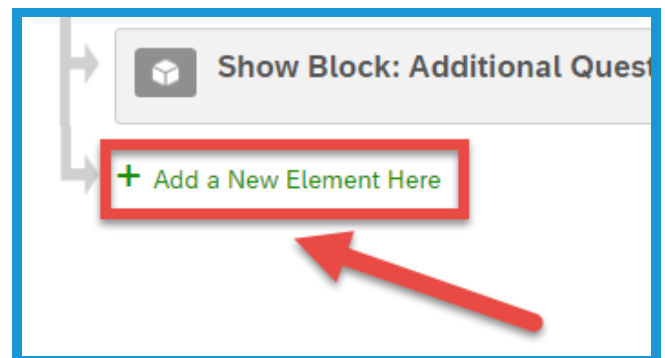


Section 4c: Survey Flow - End of Survey

1. Click the **Survey Flow** button in the upper left of the screen.

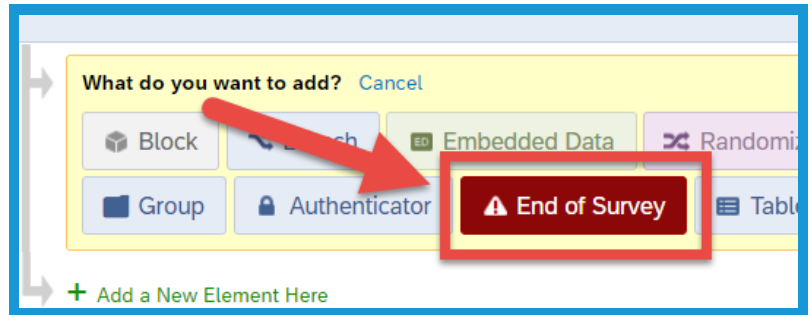


2. Click the green **Add a New Element Here** button at the bottom of the screen.

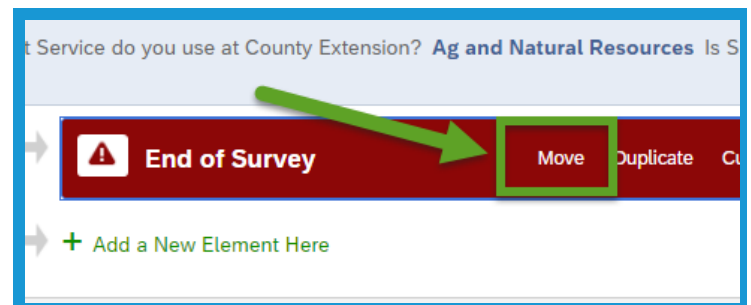


Section 4c: Survey Flow - End of Survey

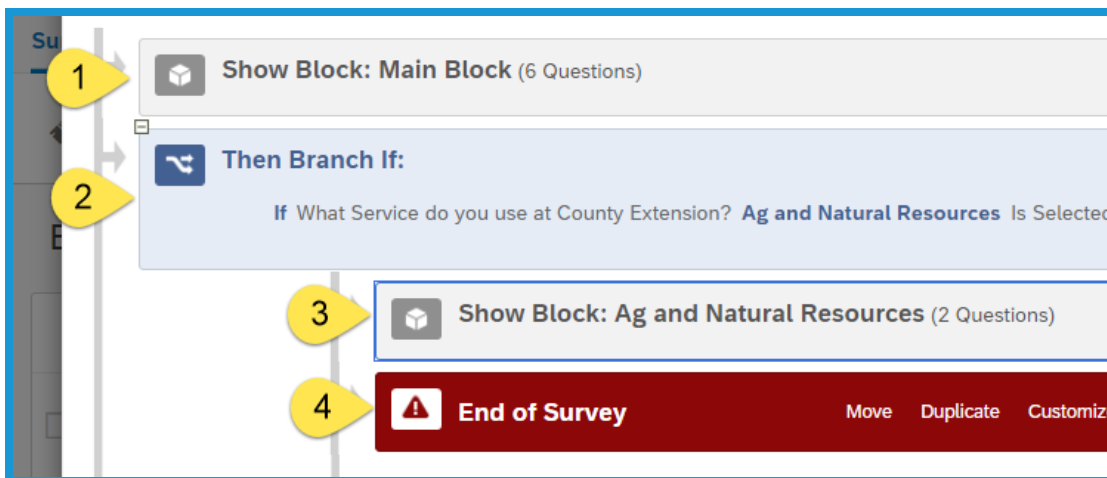
3. After clicking the **Add a New Element Here** button, select the red **End of Survey** button in the new menu.



4. **Left click and hold** the mouse on the **Move button** in the new element. You can now drag the box to the needed location.

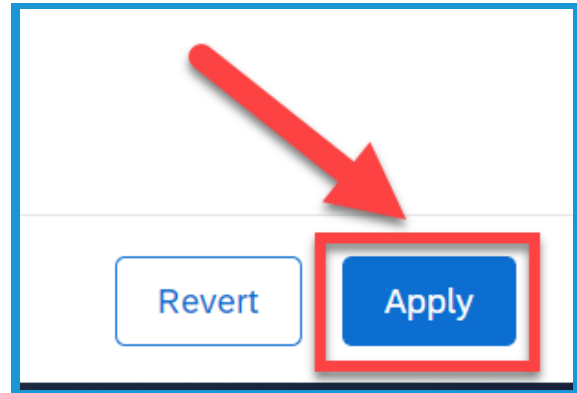


5. Ensure your End of Survey element is in the correct position. If not, your survey functionality will be impacted. For example, below the user will complete the main block **(1)**. If they Select Ag and Natural Resources **(2)**, they will be directed to a new block of questions **(3)**. After those questions are completed, the survey will end **(4)**.



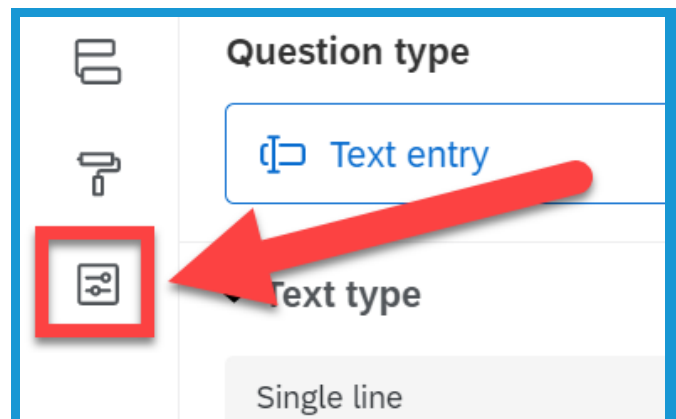
Section 4c: Survey Flow - End of Survey

6. Click **Apply** in the bottom right to confirm the changes to the Survey Flow.

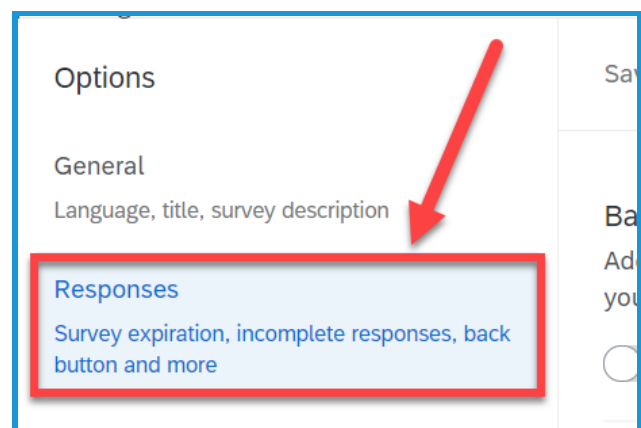


Section 5a: Survey Options - Adding a Back Button

1. Click **Survey Options** at the top of the survey edit screen.

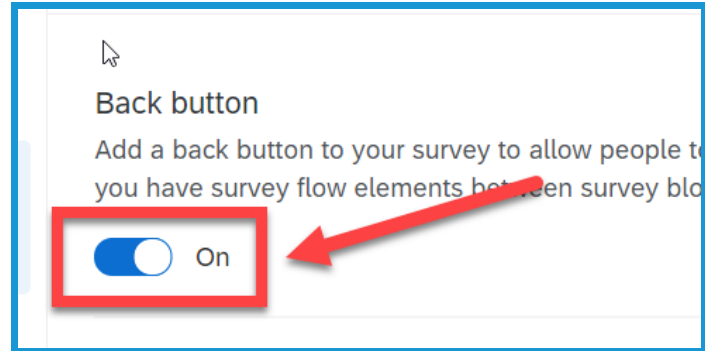


2. Select **Responses** in the Options window that appears to the left of the screen.



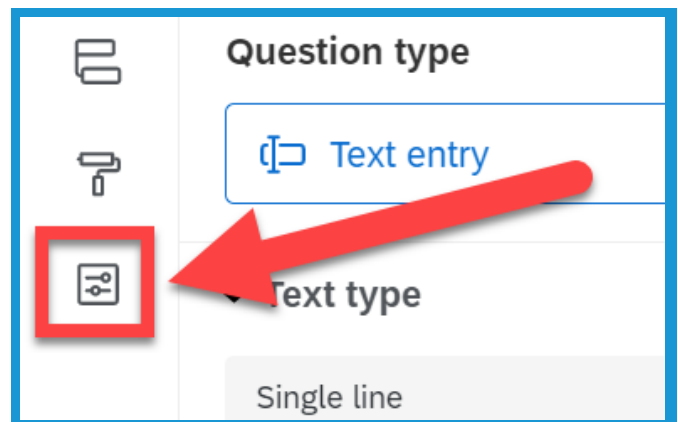
Section 5a: Survey Options - Adding a Back Button

3. Click the **On/Off button** underneath the **Back Button option**. This is located at the very top of the screen.

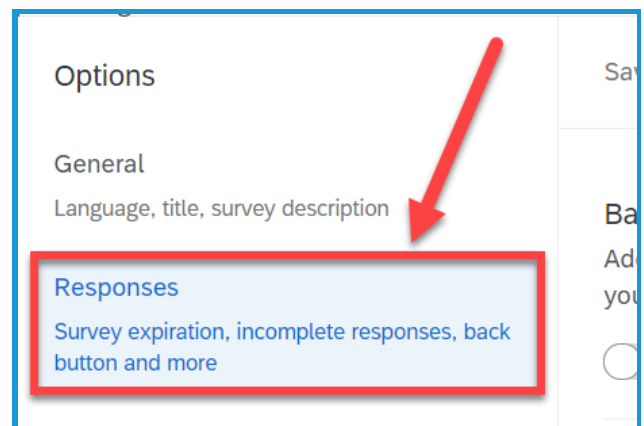


Section 5b: Survey Options - Incomplete Survey Responses

1. Click **Survey Options** at the top of the survey edit screen.

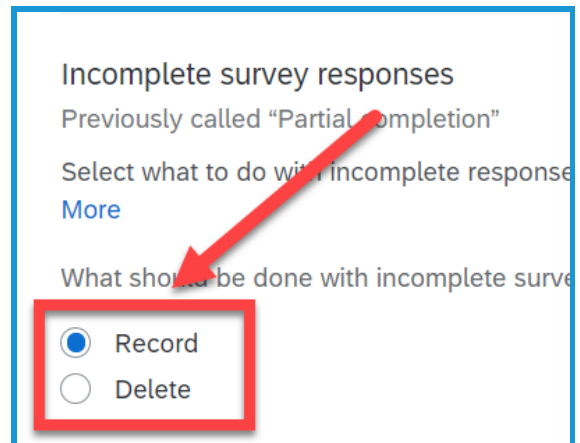


2. Select **Responses** in the Options window that appears to the left of the screen.



Section 5b: Survey Options - Incomplete Survey Responses

3. Determine if you want to **record** or **delete** responses from partially completed surveys.



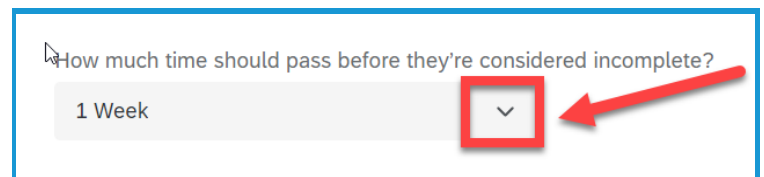
Incomplete survey responses
Previously called "Partial Completion"

Select what to do with incomplete responses
[More](#)

What should be done with incomplete surveys?

☒ Record
☐ Delete

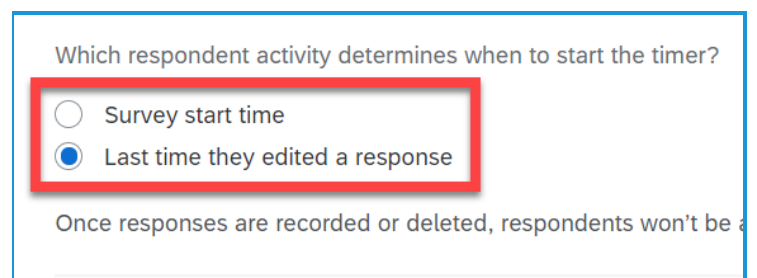
4. Select the time dropdown menu to determine how long the survey will stay open to allow the respondent to finish.



How much time should pass before they're considered incomplete?

1 Week

5. Select whether you want partially completed surveys to be closed based on when the **survey was started** or from the **most recent activity**.



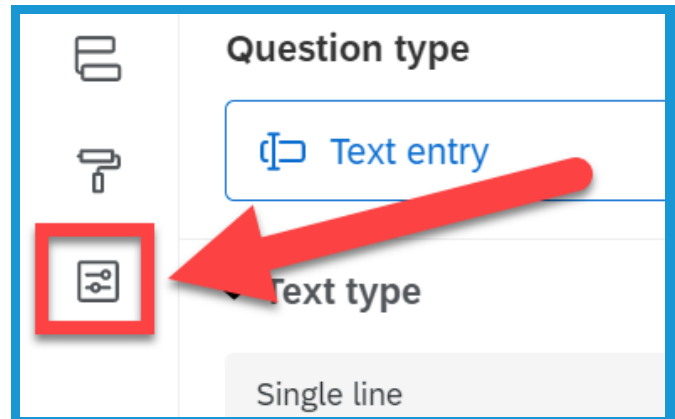
Which respondent activity determines when to start the timer?

☐ Survey start time
☒ Last time they edited a response

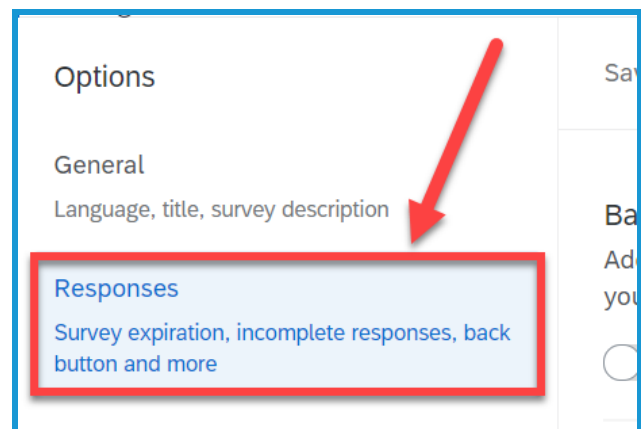
Once responses are recorded or deleted, respondents won't be able to edit their responses.

Section 5c: Survey Options - Survey Expiration Date

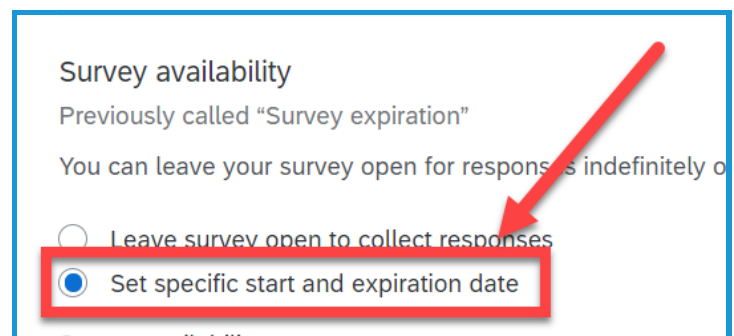
1. Click **Survey Options** at the top of the survey edit screen.



2. Select **Responses** in the Options window that appears to the left of the screen.

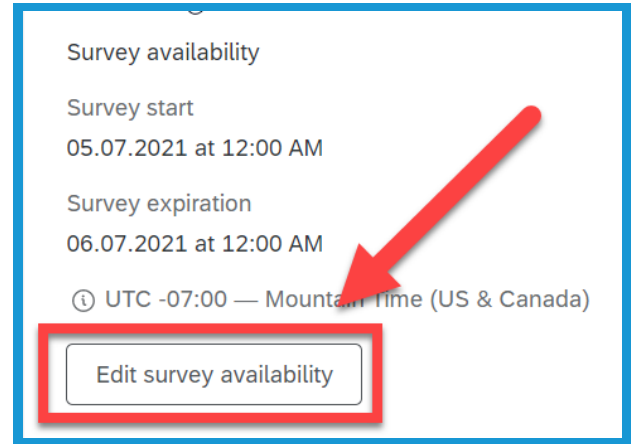


3. Select **Set specific start and expiration date** under Survey availability.



Section 5c: Survey Options - Survey Expiration Date

4. Select **Edit survey availability** to modify the start and expiration dates. When this setting is turned on, your survey is set to close a month after the feature is activated.



Survey availability

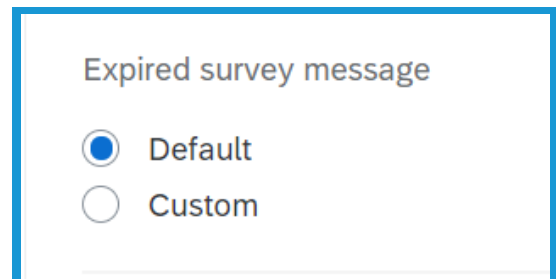
Survey start
05.07.2021 at 12:00 AM

Survey expiration
06.07.2021 at 12:00 AM

UTC -07:00 — Mountain Time (US & Canada)

Edit survey availability

5. Under **Expired survey message**, you can select Custom to create a message the user will see after clicking the link of an expired survey.



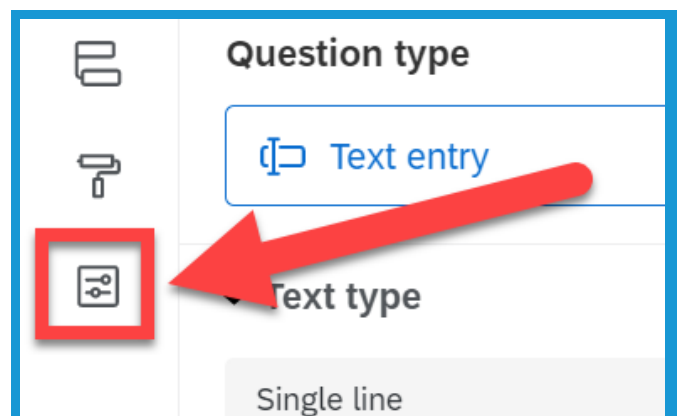
Expired survey message

☒ Default

☐ Custom

Section 5d: Survey Options - Adding a Password

1. Click **Survey Options** at the top of the survey edit screen.



Question type

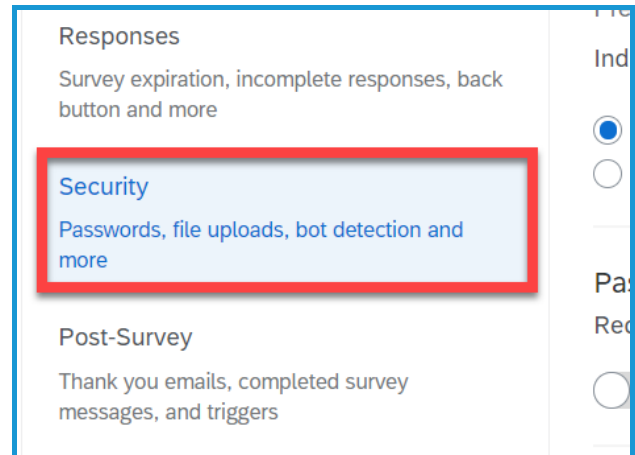
Text entry

Text type

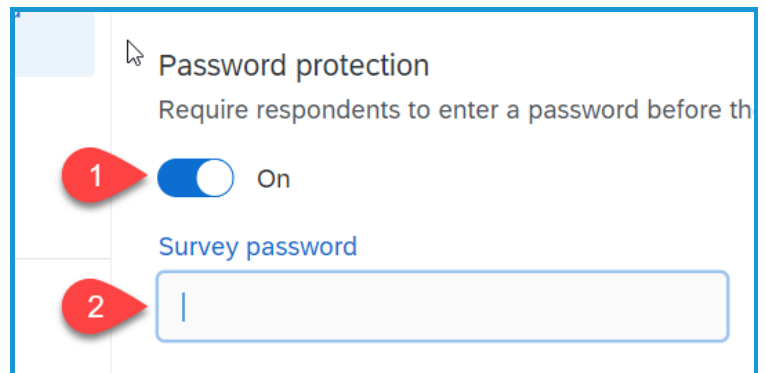
Single line

Section 5d: Survey Options - Adding a Password

2. Select **Security** in the Options window that appears to the left of the screen.

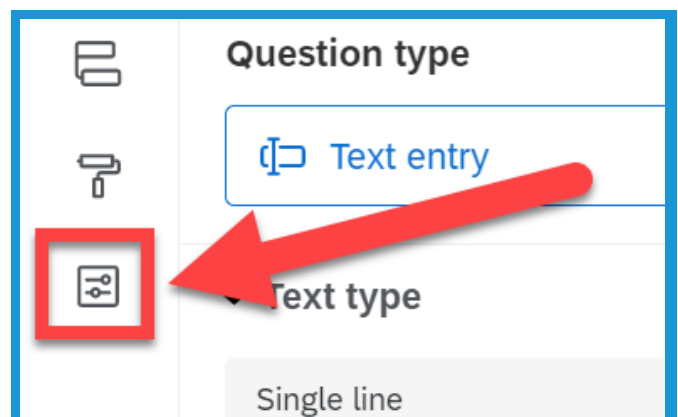


3. Select the **On/Off button (1)** under **Password protection**. A **new field will appear (2)** for you to create a password for your survey.



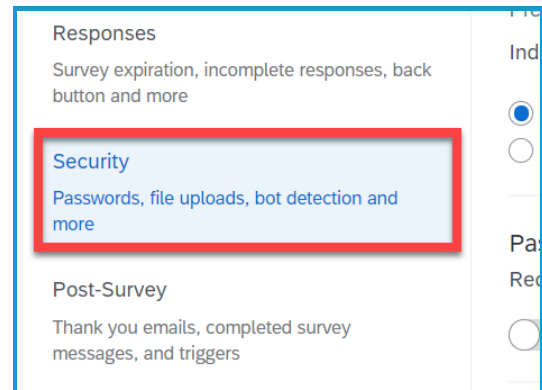
Section 5e: Survey Options - Adding a Referral Website

1. Click **Survey Options** at the top of the survey edit screen.

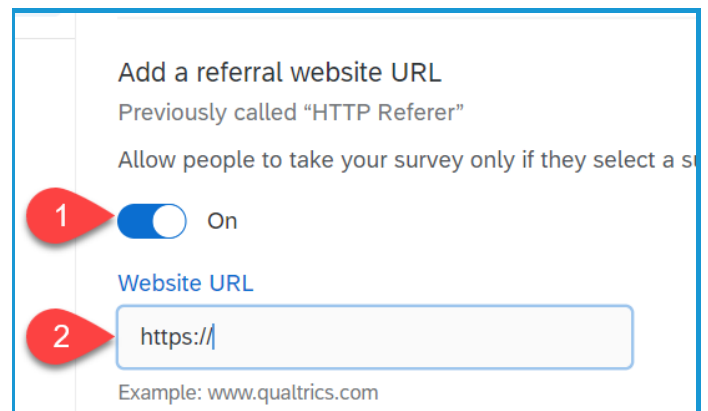


Section 5e: Survey Options - Adding a Referral Website

2. Select **Security** in the Options window that appears to the left of the screen.

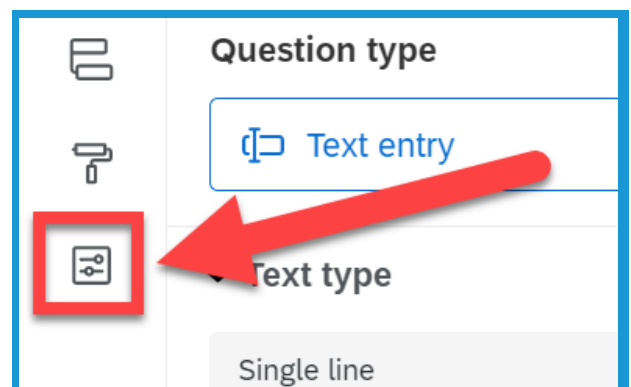


3. Under **Add a referral website URL**, select the **On/Off button (1)**. In the **Website URL** field (2), paste or type the web address where the survey will be posted. Respondents can only access the survey from that page.



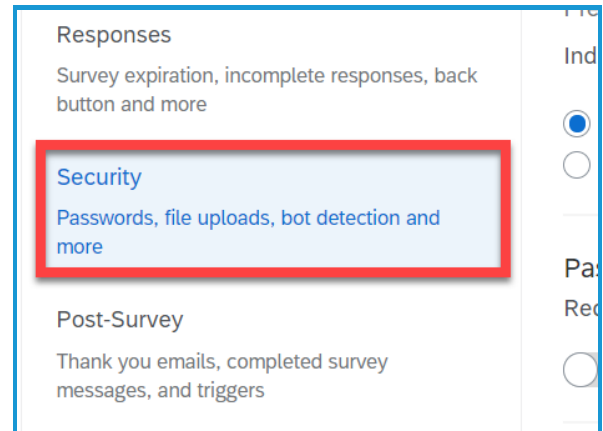
Section 5f: Survey Options - Prevent Multiple Submissions

1. Click **Survey Options** at the top of the survey edit screen.

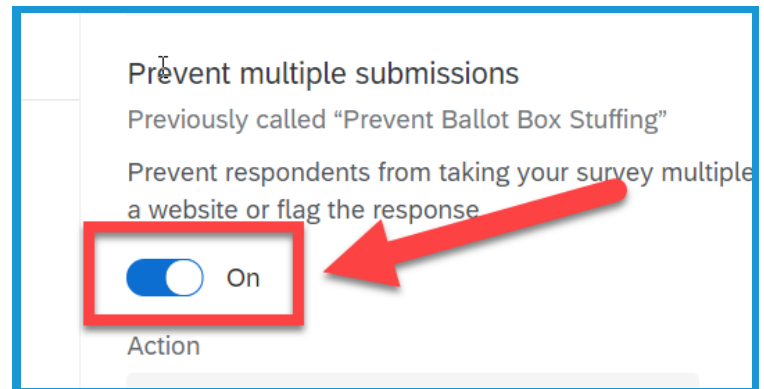


Section 5f: Survey Options - Prevent Multiple Submissions

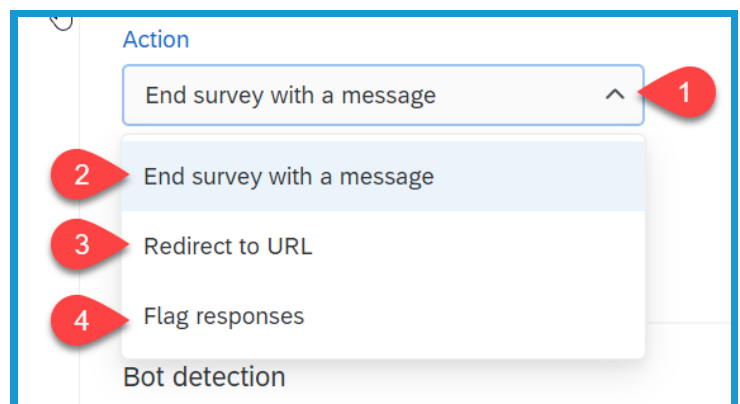
2. Select **Security** in the Options window that appears to the left of the screen.



3. Click the **On/Off button** under **Prevent multiple submissions**.

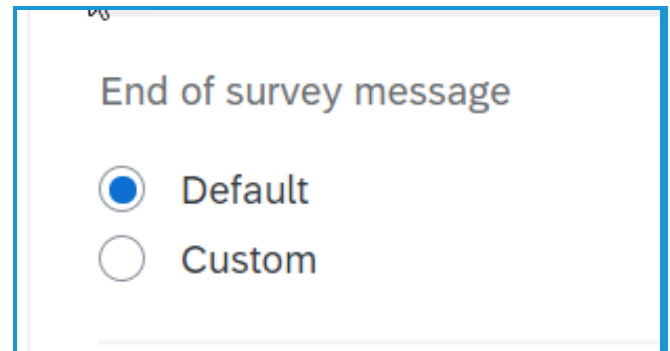


4. Select the dropdown menu under **Action (1)**. Select if you want respondents **to see a message (2)**, send them to a **different website (3)**, or **flag their responses as a duplicate submission (4)**.



Section 5f: Survey Options - Prevent Multiple Submissions

5. If **End Survey With a Message** is selected from the Action dropdown you can choose to keep the **Default message** or select **Custom** to create your own.



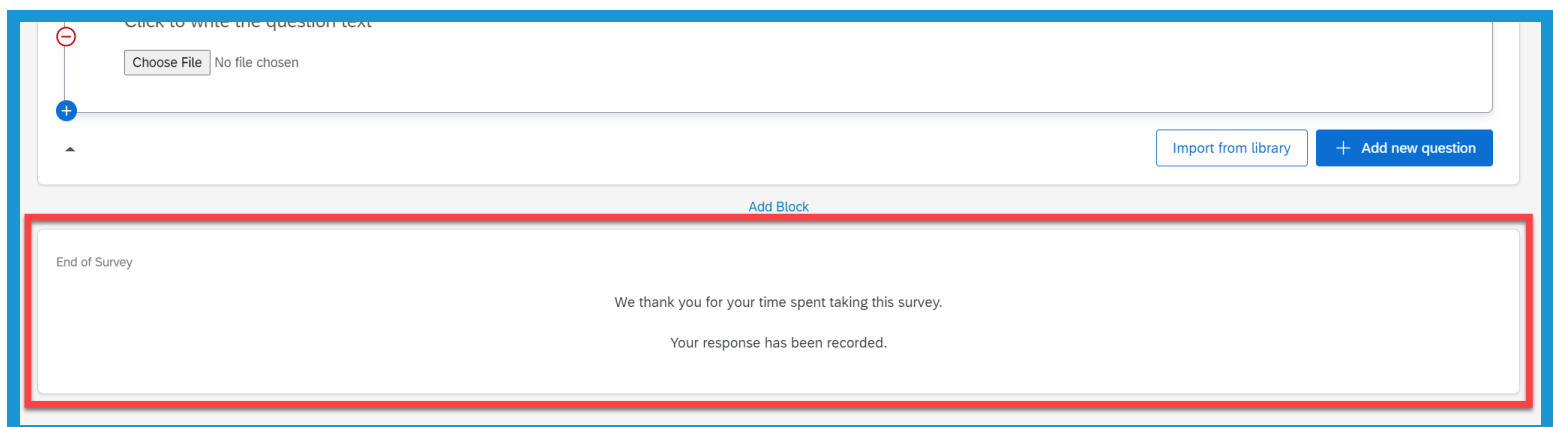
End of survey message

☒ Default

☐ Custom

Section 6: End of Survey Options

1. Click the **End of Survey box** located at the bottom of the Survey Builder screen. The **End of Survey option** will appear on the **left** of the screen.



Click to write the question text

Choose File No file chosen

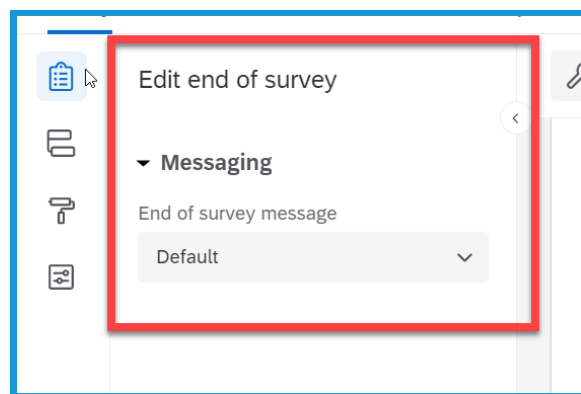
Import from library + Add new question

Add Block

End of Survey

We thank you for your time spent taking this survey.

Your response has been recorded.



Edit end of survey

▼ Messaging

End of survey message

Default

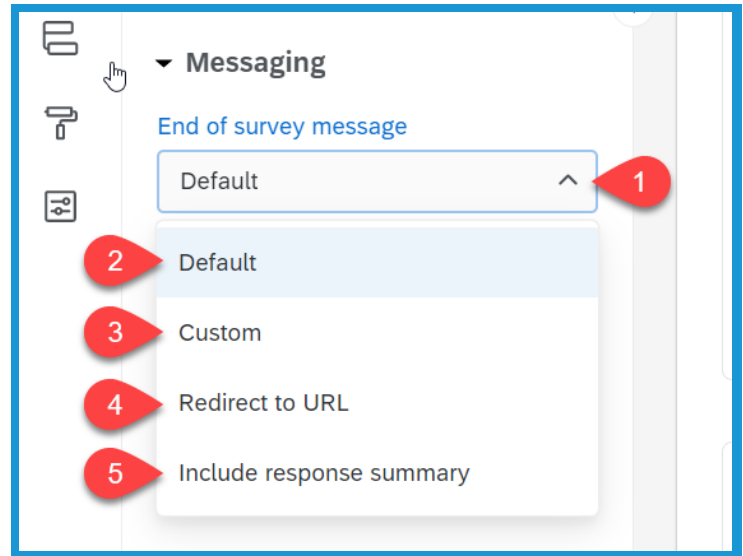
Section 6: End of Survey Options

2. Select the **End of survey message dropdown (1)**. **Default (2)** is the pre-chosen option.

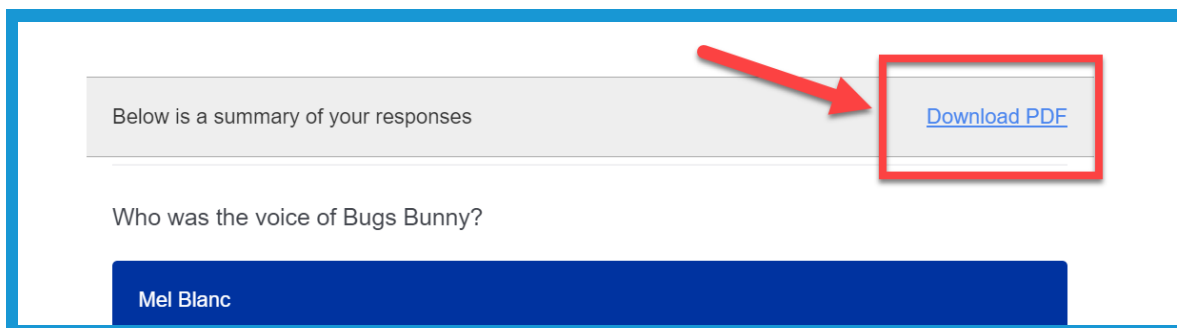
A. **Custom (3)** to build your own message.

B. **Redirect to URL (4)** to chose a website the user will be sent to upon completion of the survey.

C. **Include response summary (5)** will produce a compilation of the respondents answers at the end of the survey.

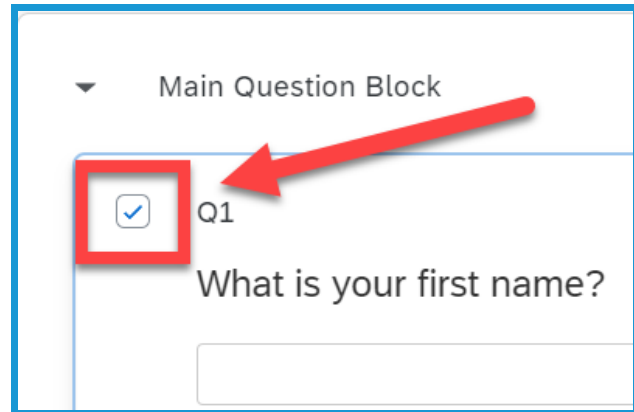


2. If **Include response summary** is selected, the user will have the option to download a PDF copy of their survey answers to keep for their records.

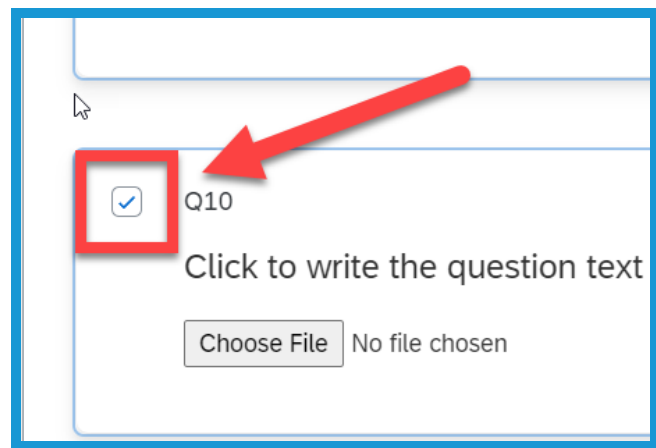


Section 7: Auto-Numbering

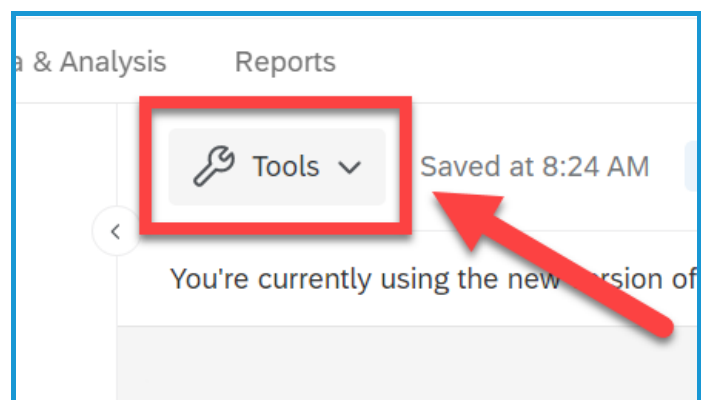
1. Check the box to the **left** of the **first question** in your survey.



2. Scroll to the **last question**.
Then **hold down** the **Shift** key
on your keyboard, and click the
box next to the question number.

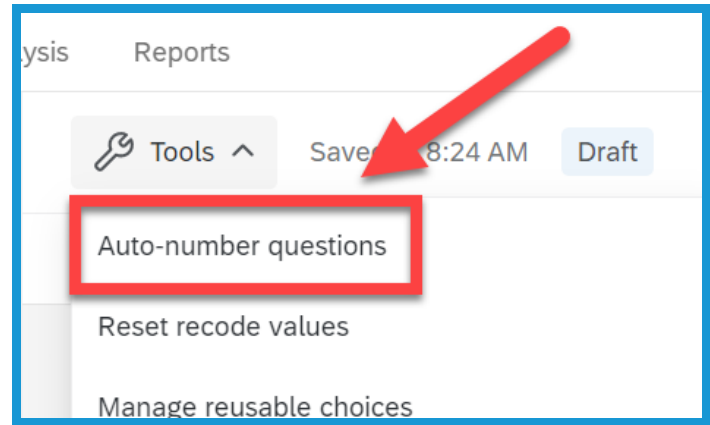


3. Select **Tools** at the top of the
screen.

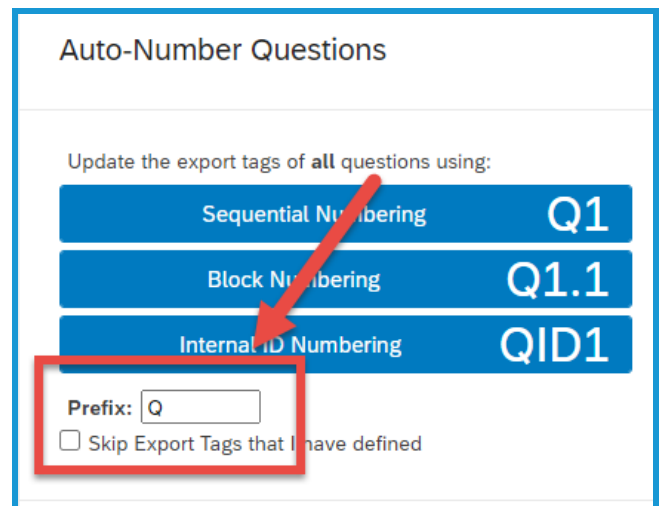


Section 7: Auto-Numbering

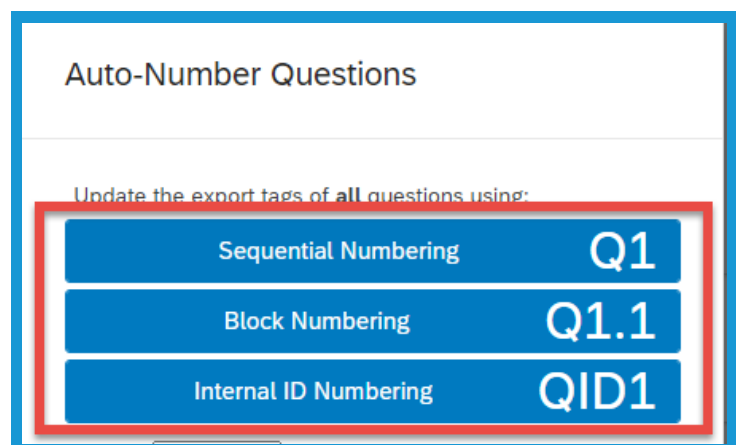
4. Select **Auto-Number Questions** in the new dropdown menu.



5. Decide if you want to keep the prefix before each question. By default, each question will have a "Q" before the number.



6. Click the preferred style of numbering from the three options provided.





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

Qualtrics: Adding Logic & Advanced Survey Options

**Any questions or training request:
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