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

Qualtrics
Part 2: Getting Started

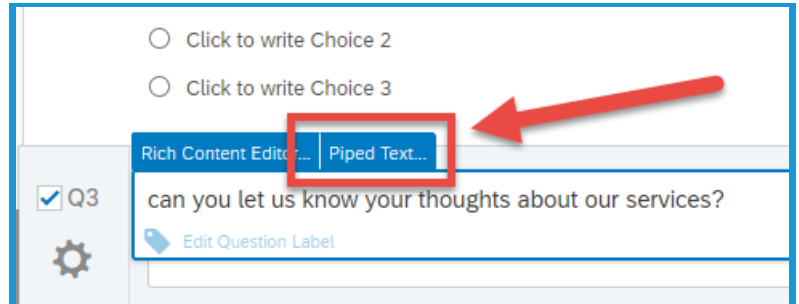**Any questions or training request:**
chad.jennings@uky.edu

# Table of Contents

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)**.
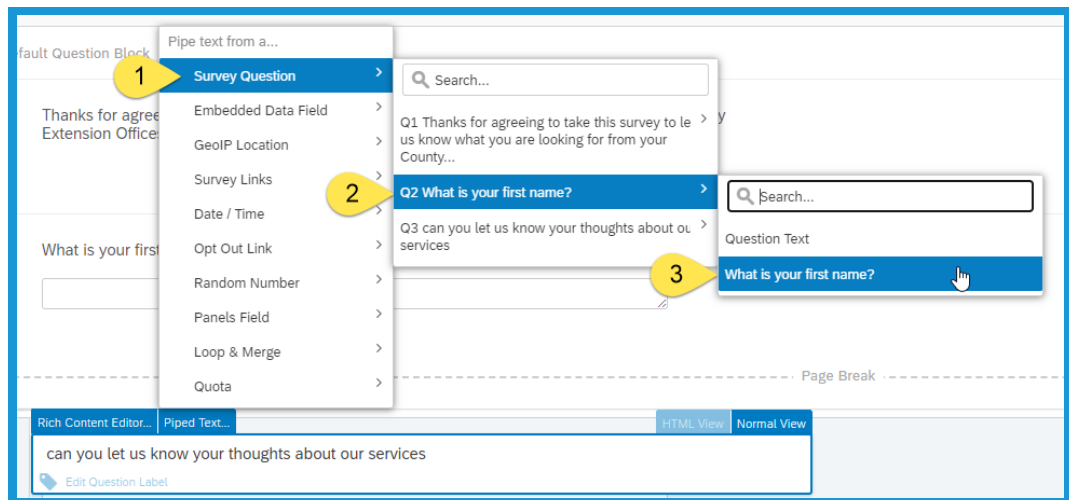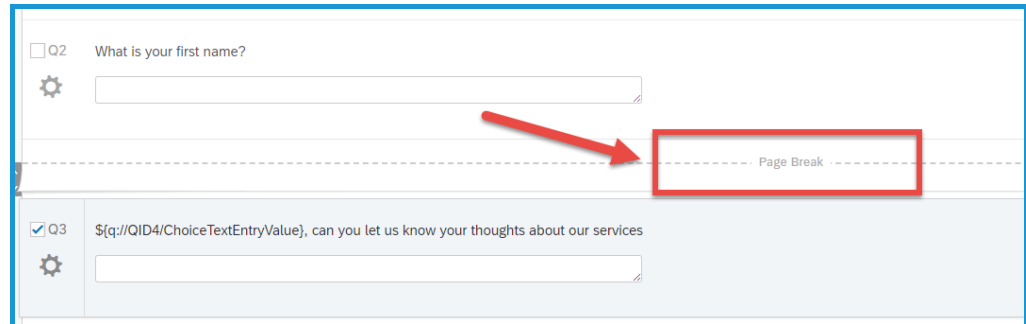
3. If the Piped Text was done correctly, you will see the following formula in the needed location.
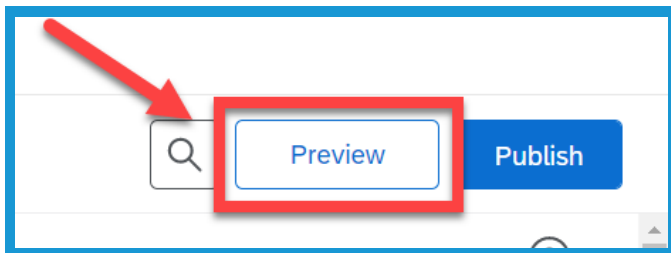
1
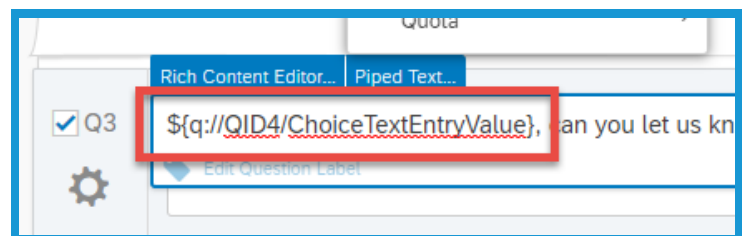
Section 1: Piped Text

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.**)
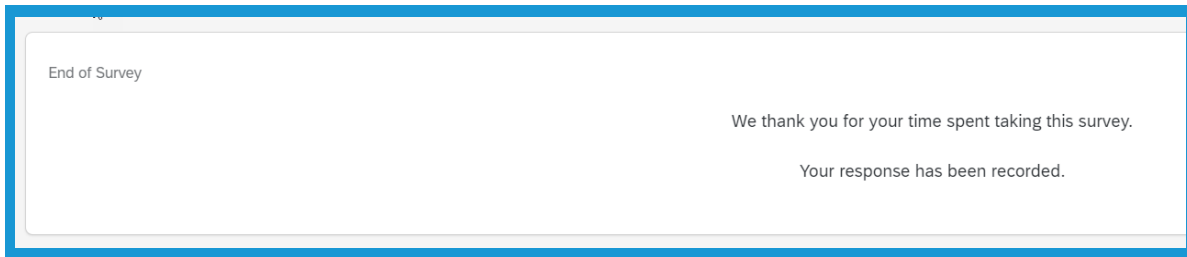

5. Click **Preview** in the upper right corner to test your survey to ensure that the Piped Text is working correctly.

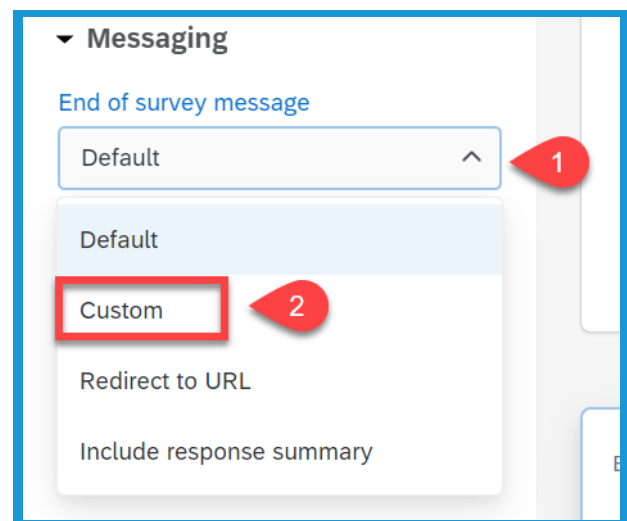# Section 2: End of Survey Message

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.
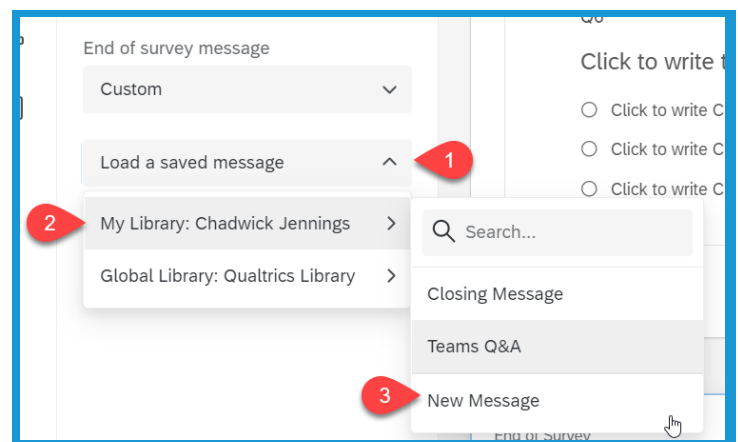
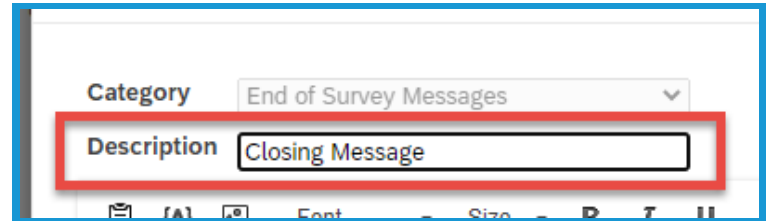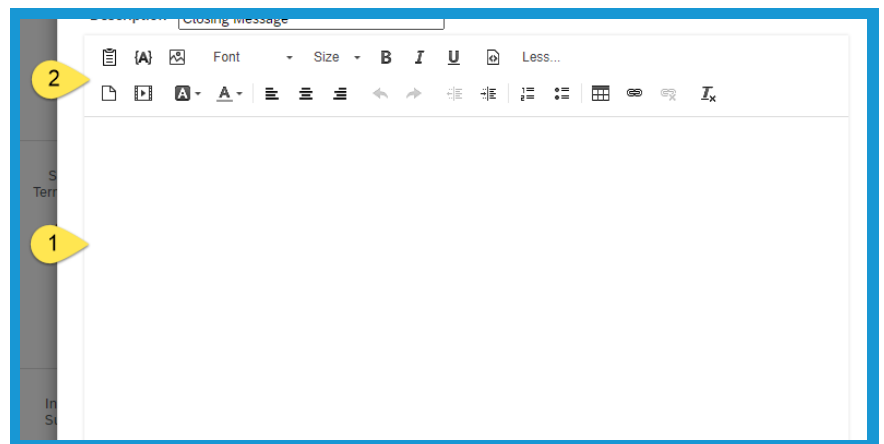## Section 2: End of Survey Message

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.

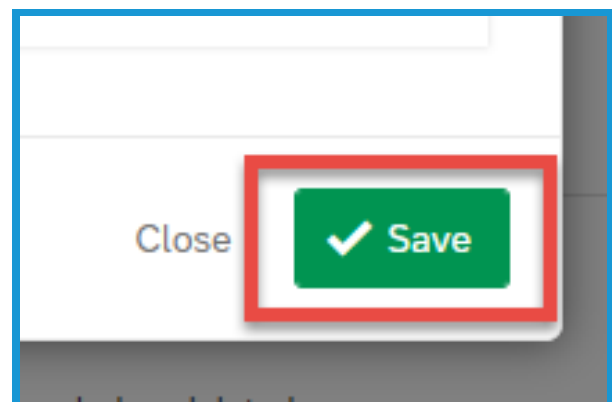5. Type the message in the body text box (**1**), and format the message as needed with the toolbox (**2**).
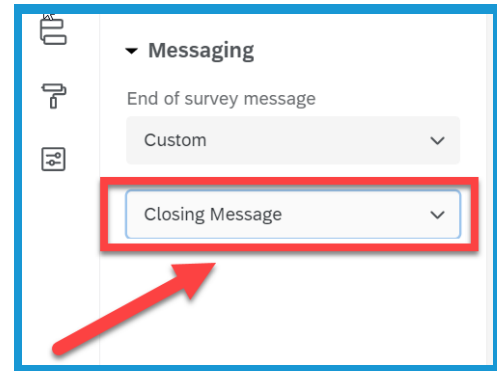

6. Click **Save** in the bottom right corner of the screen when the message is completed. Your new message will now appear at the bottom of your survey builder.
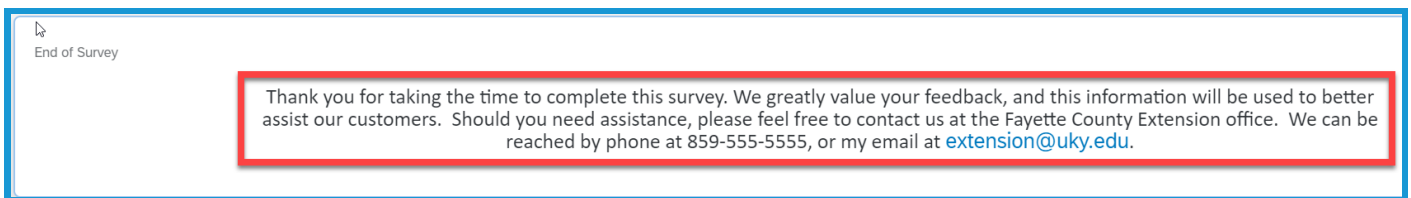
Section 2: End of Survey Message

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.

End of Survey

Thank you for taking the time to complete this survey. We greatly value your feedback, and this information will be used to better assist our customers. Should you need assistance, please feel free to contact us at the Fayette County Extension office. We can be reached by phone at 859-555-5555, or my email at extension@uky.edu.

Section 3: Collaboration

1. On the **Home Page**, select the **pancake icon** in the upper right **(1)**. Then select **Projects (2)**.
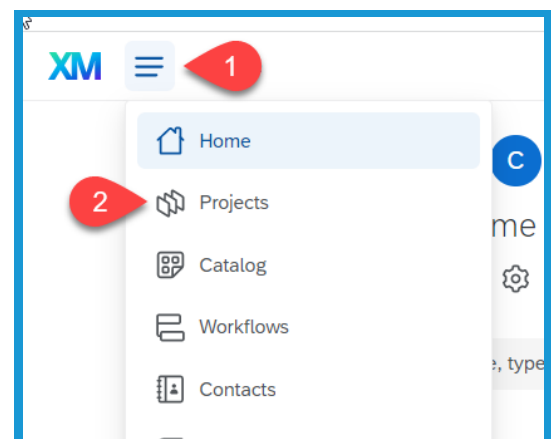
Section 3: Collaboration

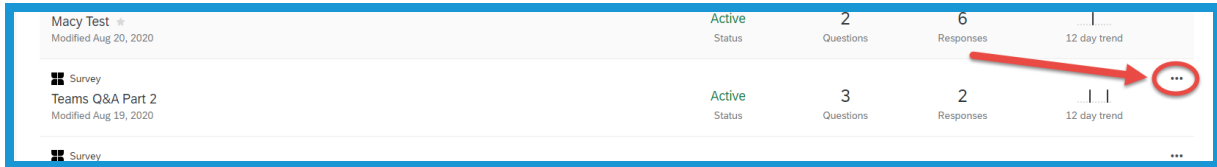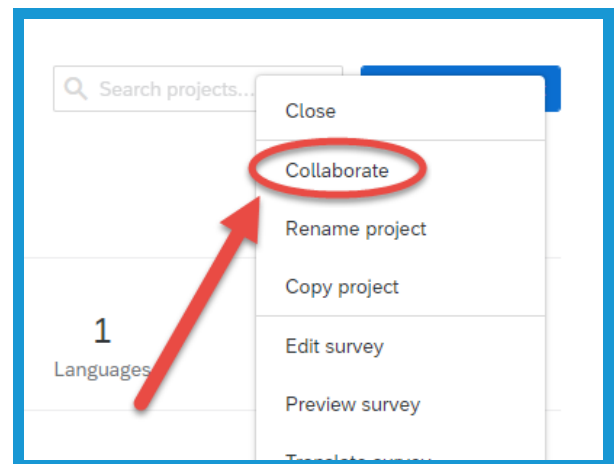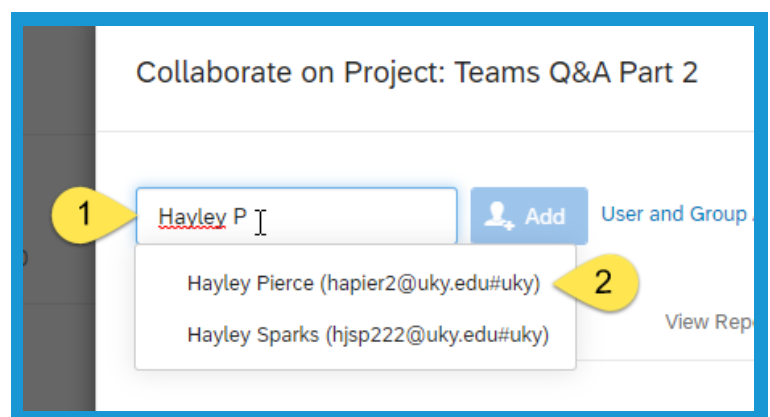2. On the Project screen, click the **three dots** to the right of the project you want to copy.

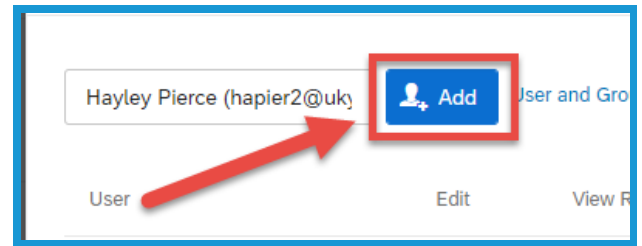3. In the new menu click **Collaborate**.

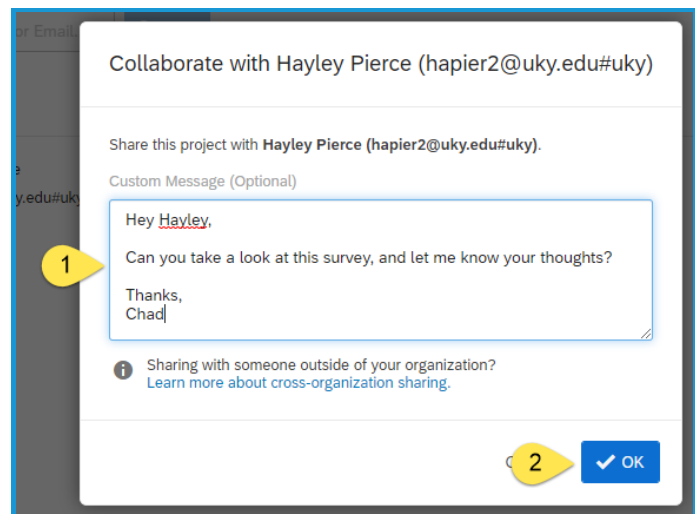4. Type the name of the user in the name field. When the name auto-populates click on the user.
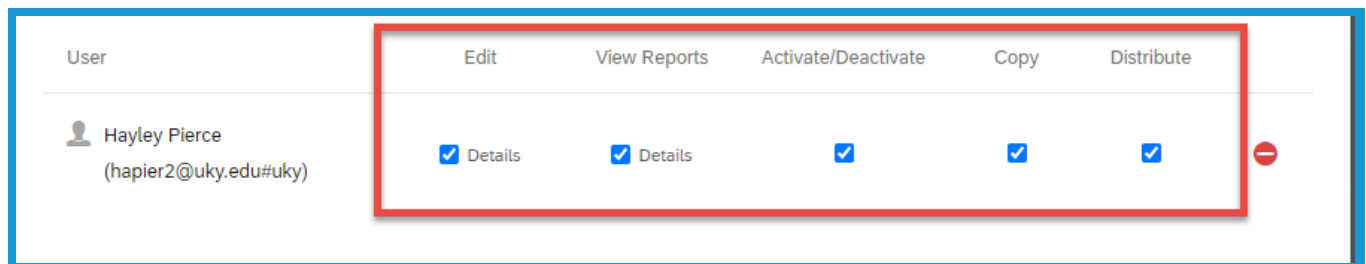
Section 3: Collaboration

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.
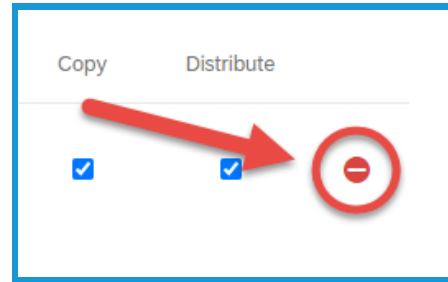

7. Once added you can turn off the user's various abilities in the project by un-checking the various options.
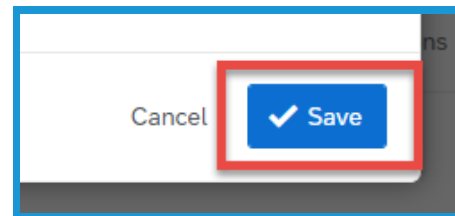
Section 3: Collaboration

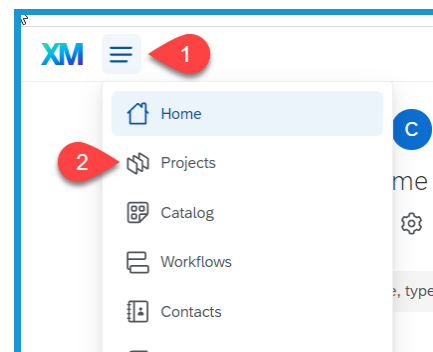8. Click the minus sign to the far right to remove the user's access to the project.

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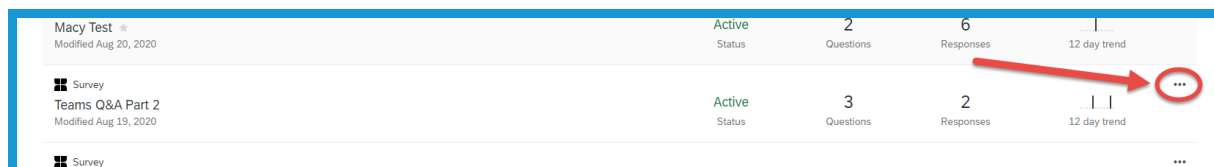

Section 4: Copying a Survey

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

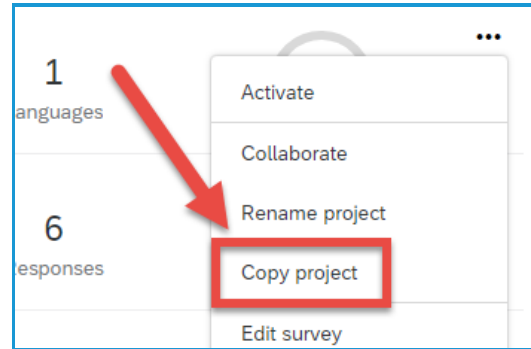
2. On the Project screen, click the **three dots** to the right of the project you want to copy.
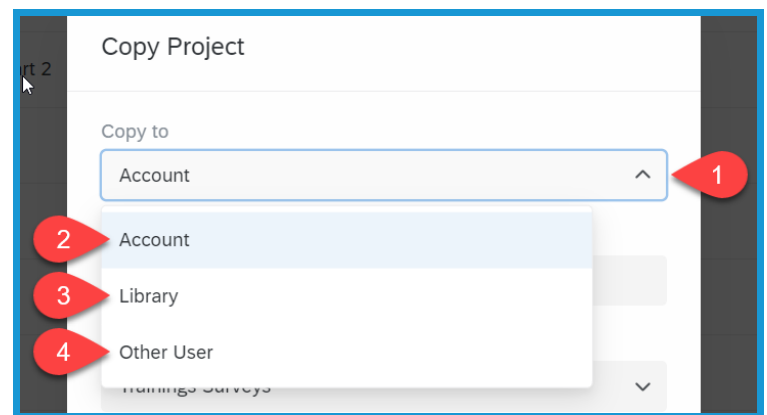
Section 4: Copying a Survey

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.
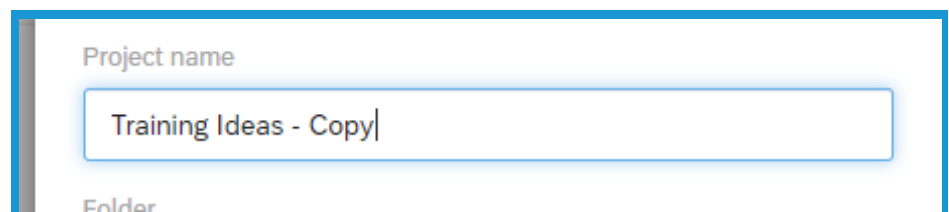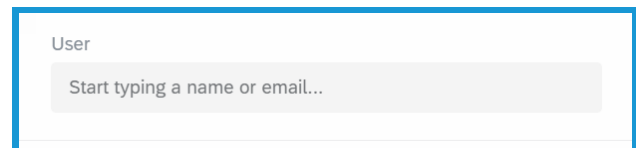
Section 4: Copying a Survey

6. If **Account or Library** is selected in **Step 3**, click the **Folder** dropdown menu to chose 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.

Folder
Online

or

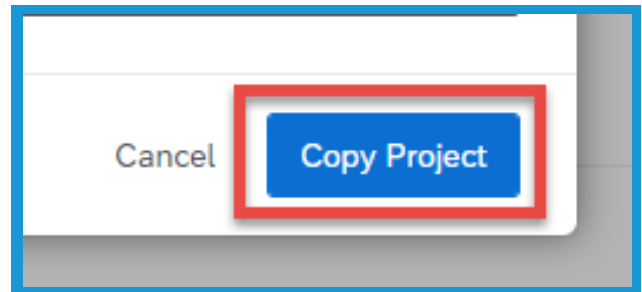User
Start typing a name or email...
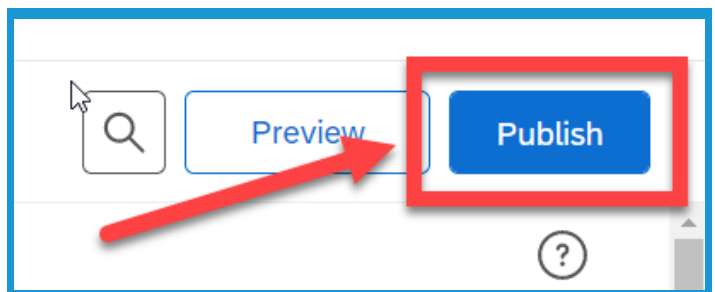
7. Click **Copy Project** in the lower right corner to duplicate the survey.

Cancel   Copy Project

Section 5a: Distribution - Publishing

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

Preview   Publish

Section 5a: Distribution - Publishing

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

ExpertReview
Survey strength: **Fair**
Recommendations: **1**

View recommendations

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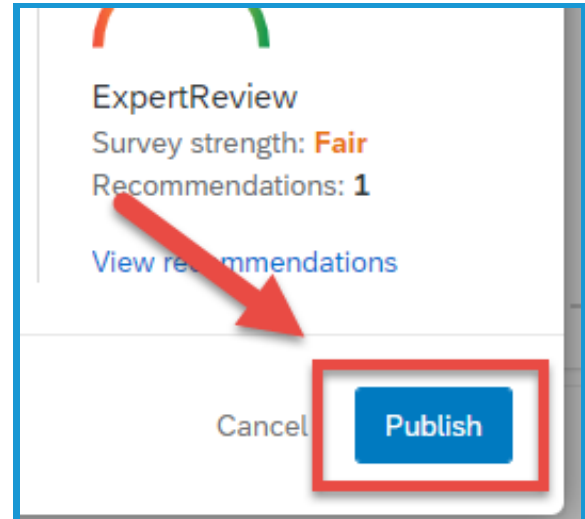
3. A new window will open with a link to your Qualtrics survey. Copy and paste the link into a message of your choosing. If this is a survey that has already been published, this window will not appear. You will need to access the Distribution area of your survey. **(See section 5b)**
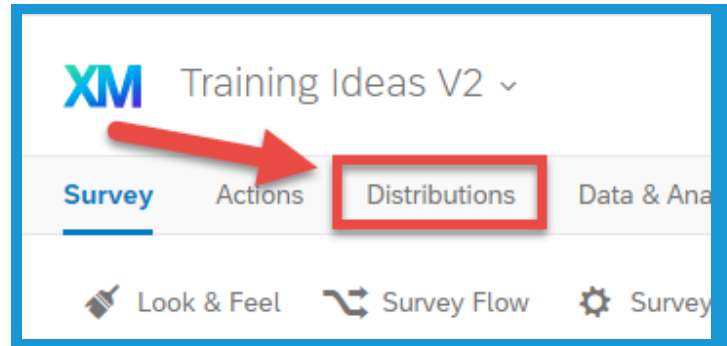

Survey Activated

Your survey has been successfully published and activated. You anonymous link below.

https://uky.az1.qualtrics.com/jfe/form/SV_2gjnSlu7fFjf9kx

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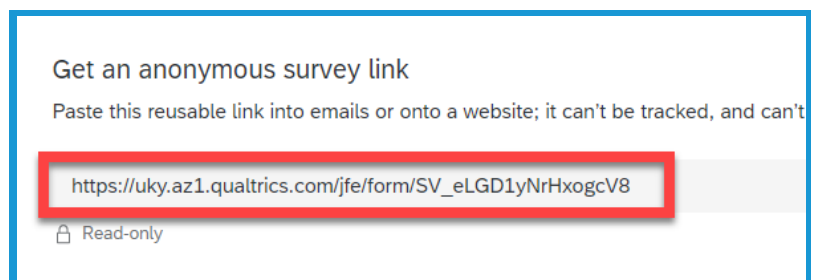
Section 5b: Distribution - Anonymous Link

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

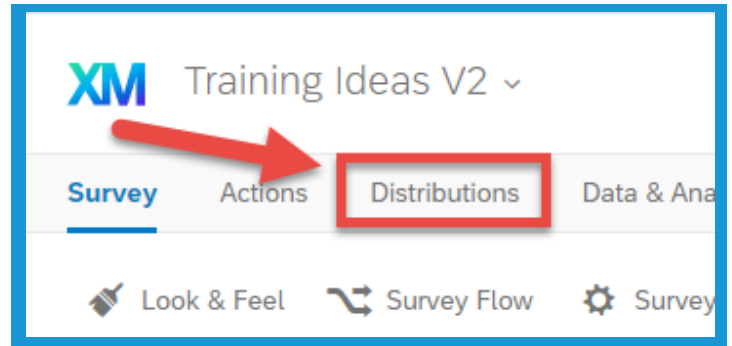2. Click **Anonymous Link** on the left side of the screen.
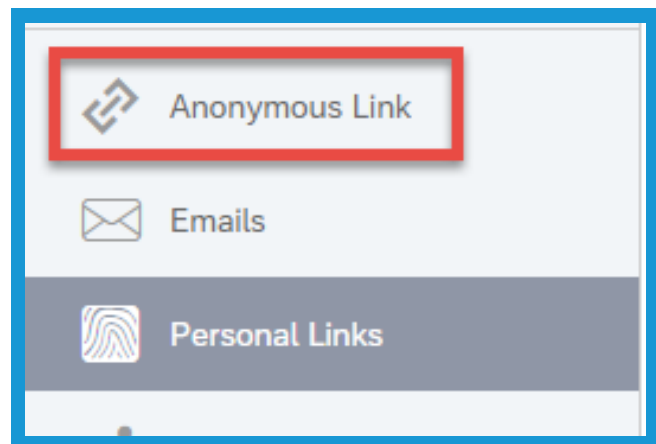
3. The link will appear in the middle of the screen, and can now be copied and pasted into a message of your choosing.
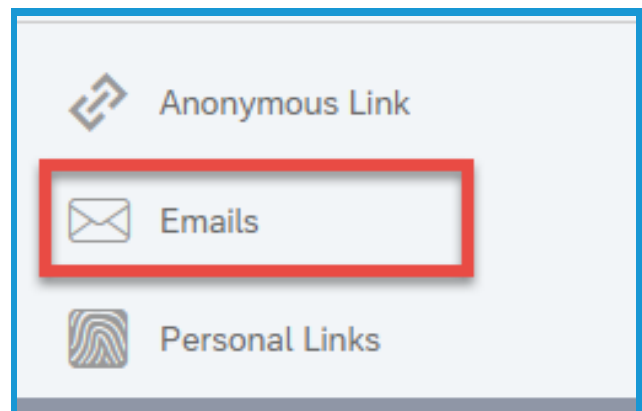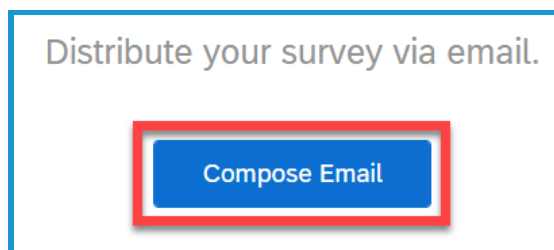
Section 5c: Distribution - Emails

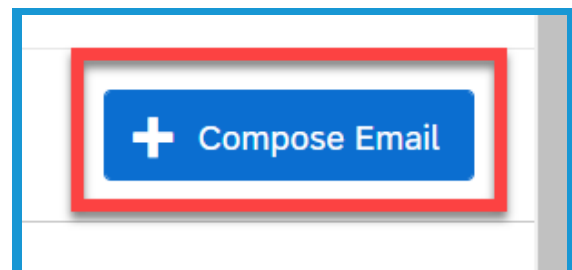1. Click **Distributions** at the
top of the survey's edit page.

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

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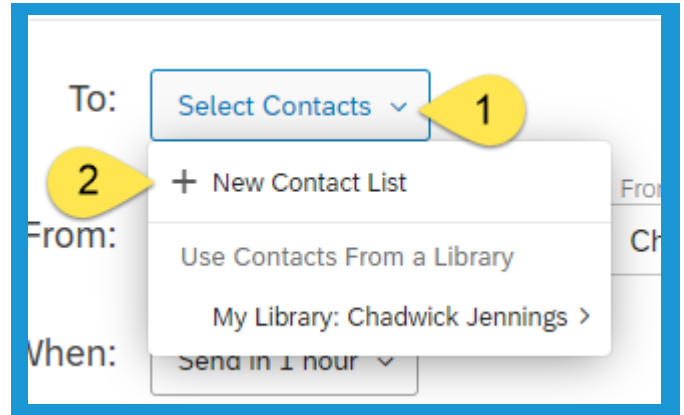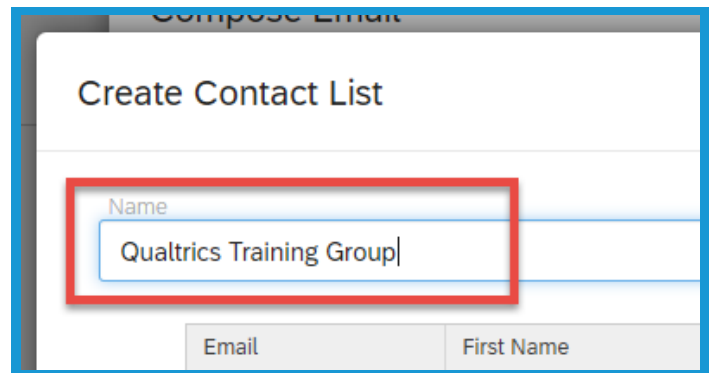the top right corner of the screen.

 or

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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.
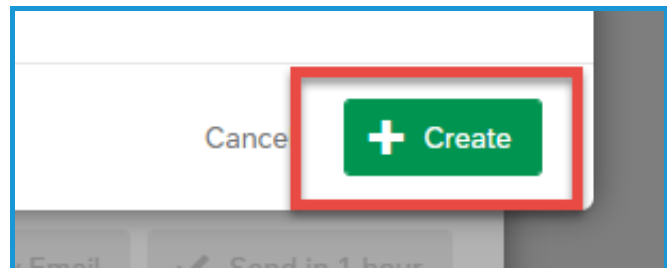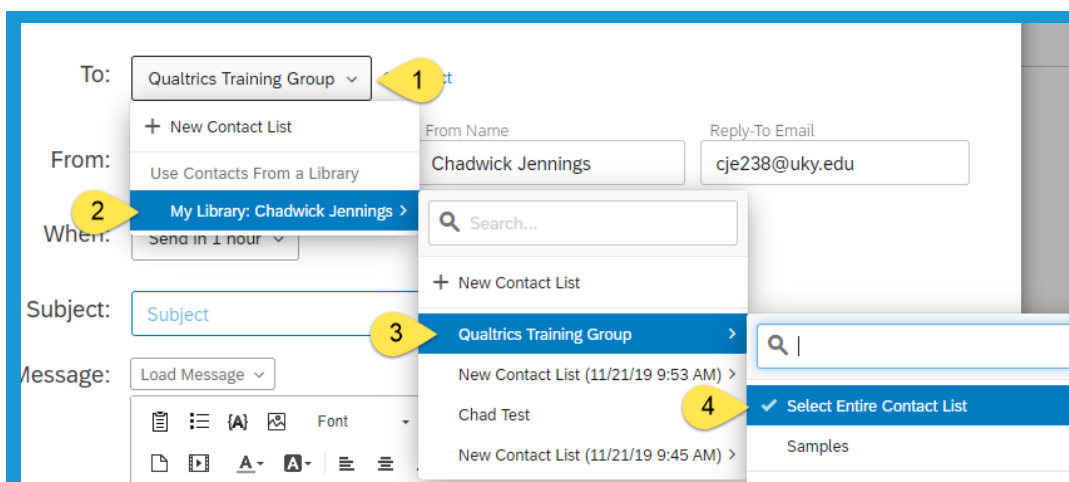
Section 5c: Distribution - Emails

7. Click the **green plus** sign in the upper right to add fields for information that you may want to include.
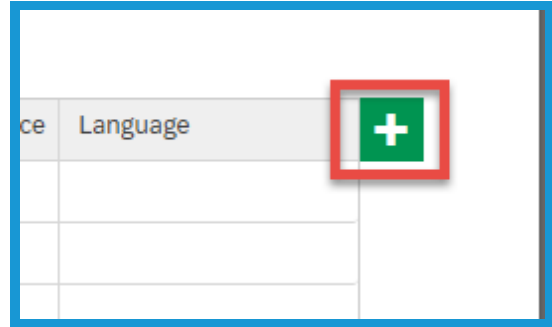
8. Click **Create** in the lower right to save the new list.

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**).
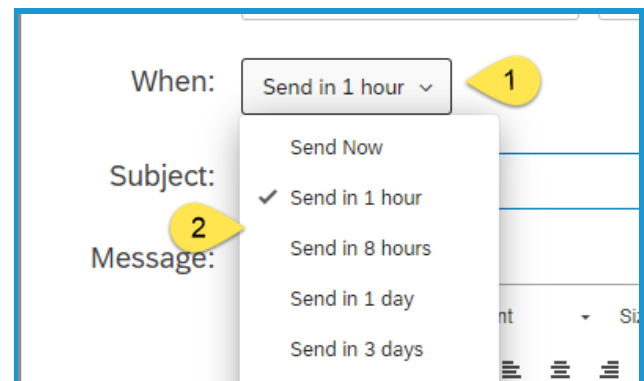
Section 5c: Distribution - Emails

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.
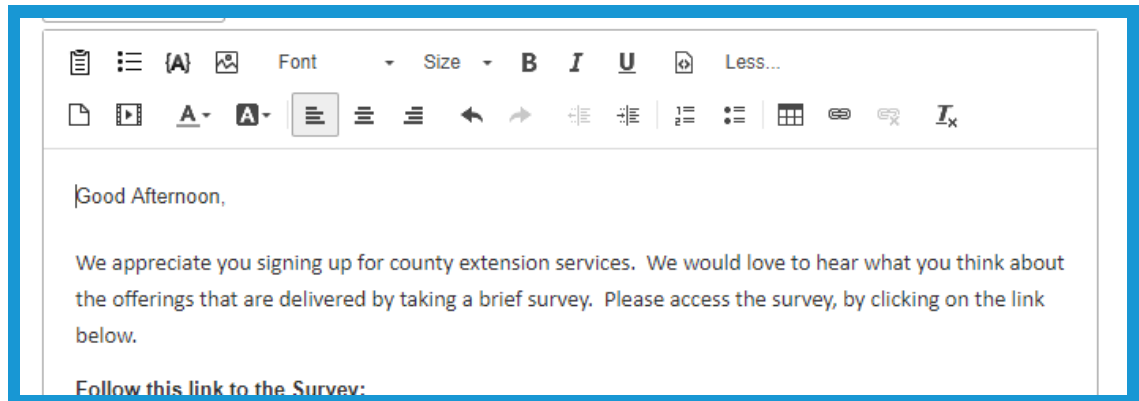

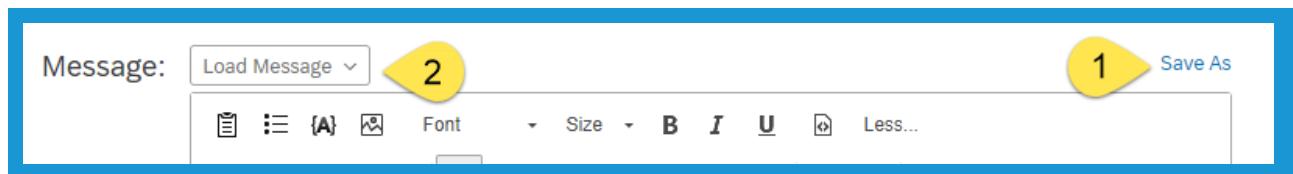12. In the **Subject Field**, give your email a subject.
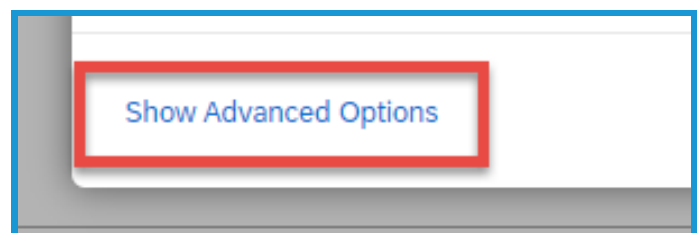

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Section 5c: Distribution - Emails

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**).
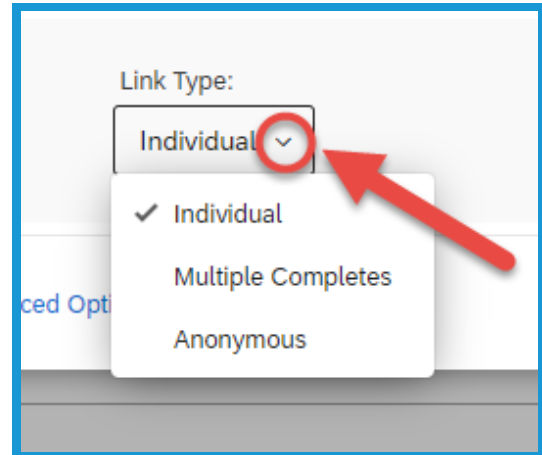

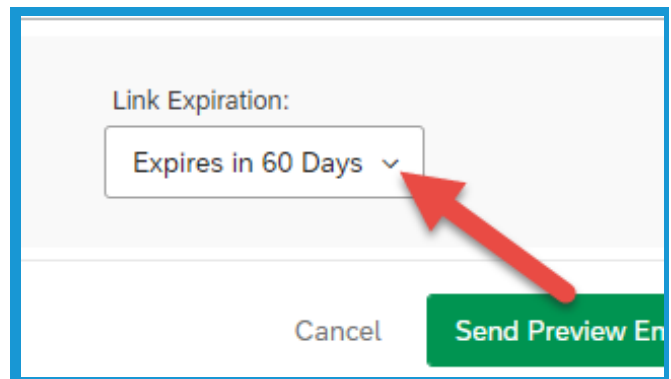15. Click **Show Advanced Options** in the bottom left corner.
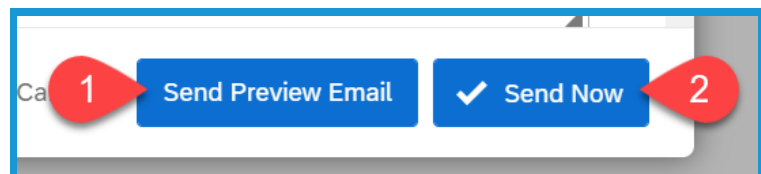
Section 5c: Distribution - Emails

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.
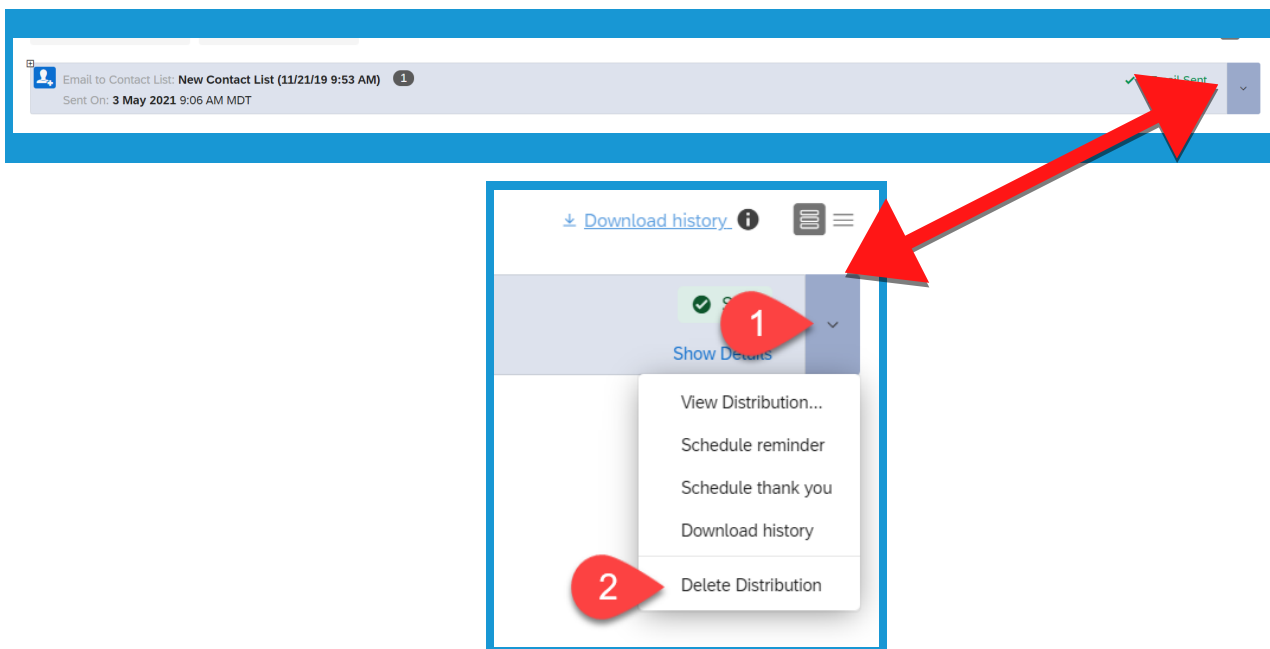
Section 5c: Distribution - Emails

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**).
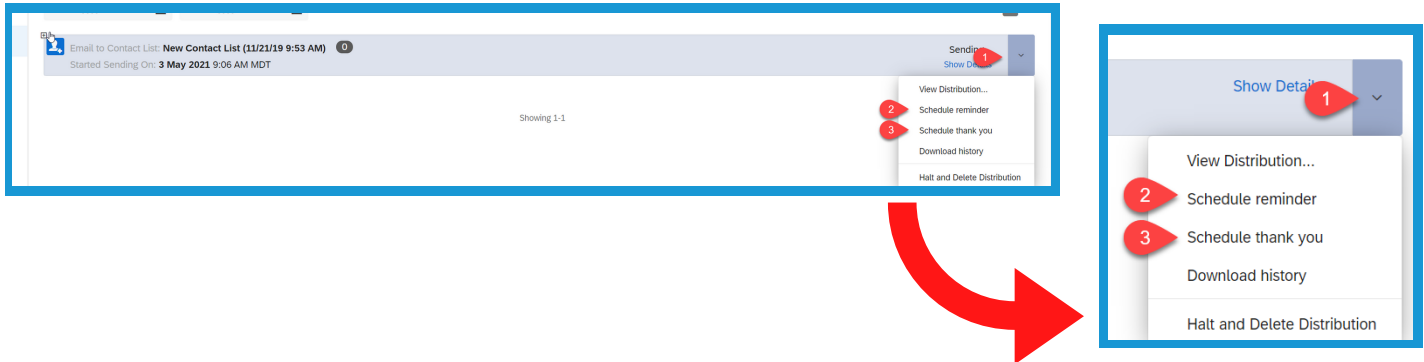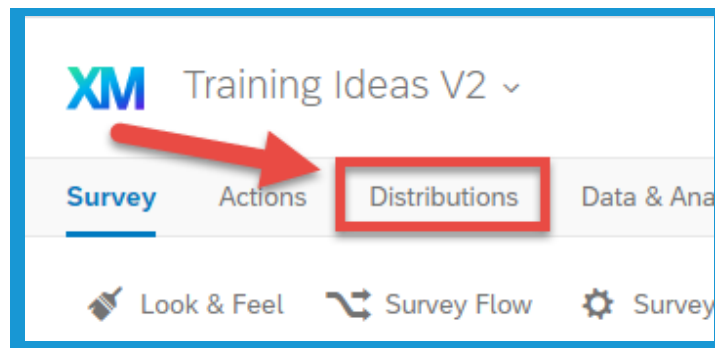

20. To delete the email, click the drop-down menu to the right of the email (**1**). Then select **Halt and Delete Distribution** (**2**).
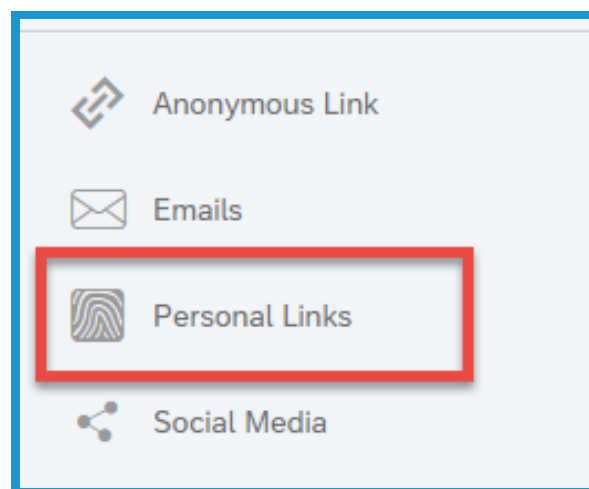
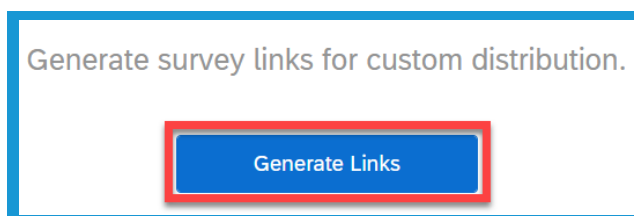## Section 5d: Distribution - Private Links

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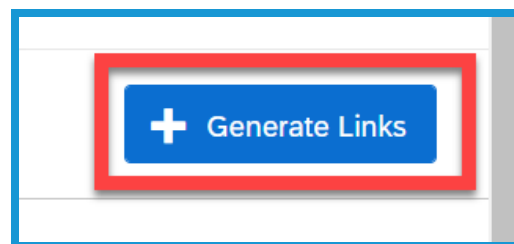

2. Click **Personal Links** on the left side of the screen.

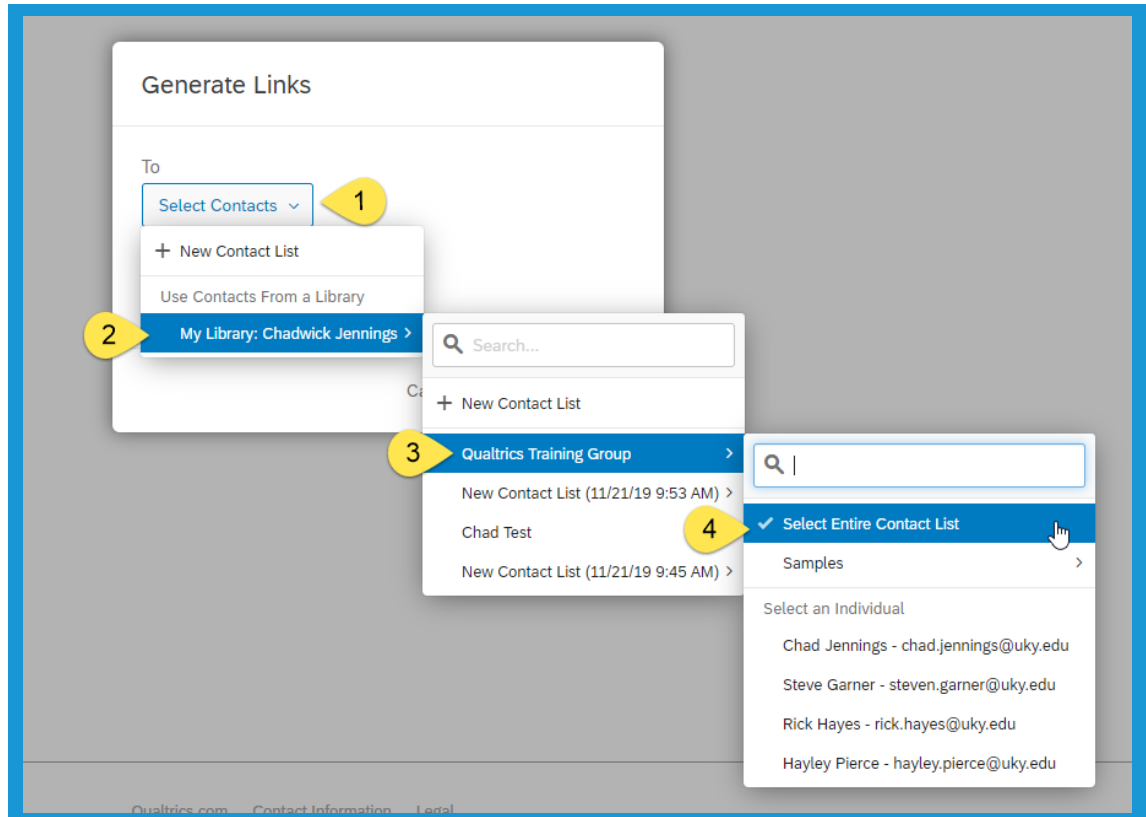3. Click **Generate Links** in the middle or top right corner of the screen.

 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**).
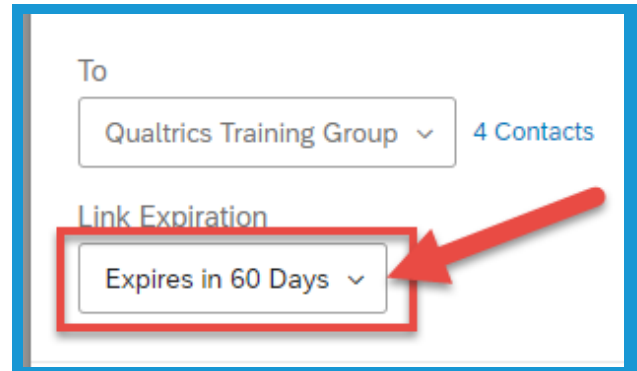

5. If creating a new list, click the drop down menu under the **To** Field (**1**), and select **New Contact List** (**2**). (**See Section 5c, Steps 5-8, pg 14**)
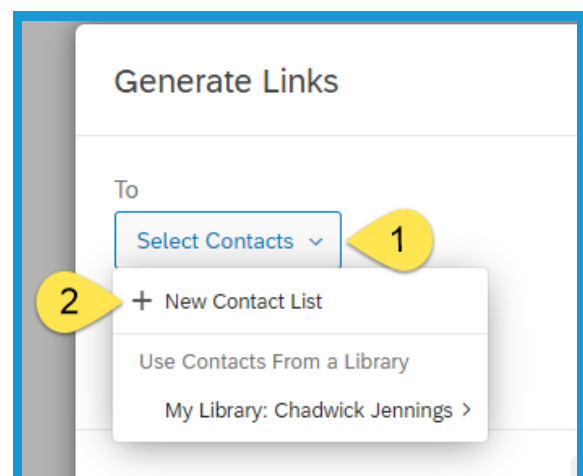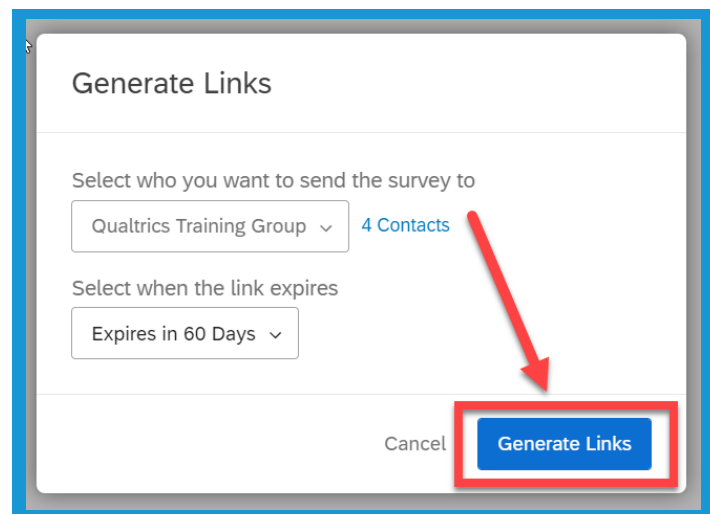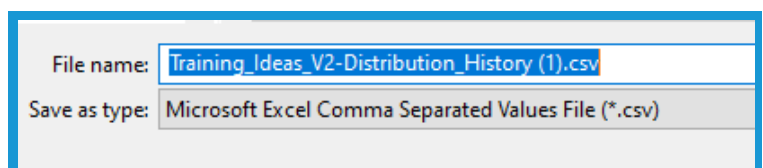
Section 5d: Distribution - Private Links

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.

To

Qualtrics Training Group ⌄   4 Contacts

Link Expiration

Expires in 60 Days ⌄

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

Generate Links

Select who you want to send the survey to

Qualtrics Training Group ⌄   4 Contacts

Select when the link expires

Expires in 60 Days ⌄

Cancel   **Generate Links**

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

File name: Training_Ideas_V2-Distribution_History (1).csv

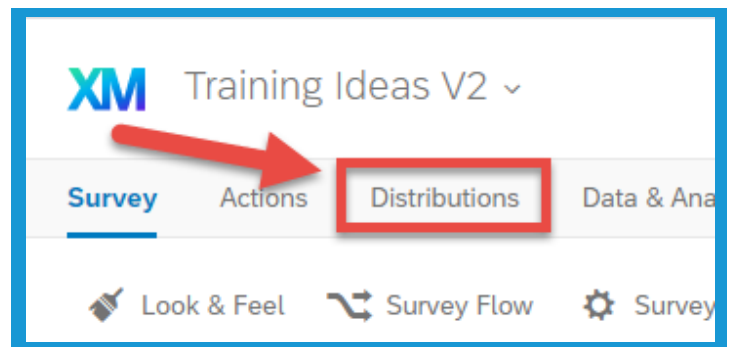Save as type: Microsoft Excel Comma Separated Values File (*.csv)

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.
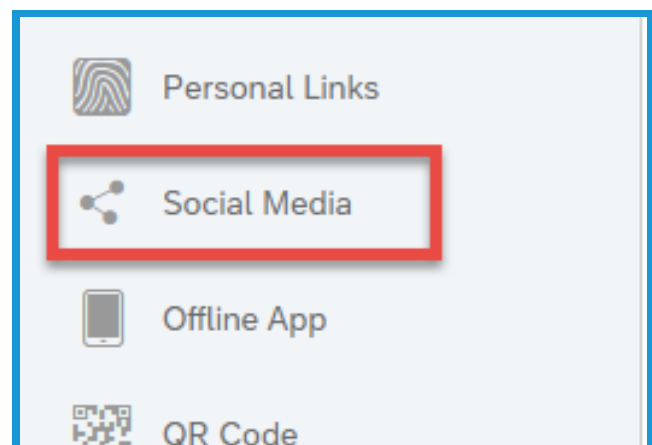

Section 5e: Distribution - Social Media

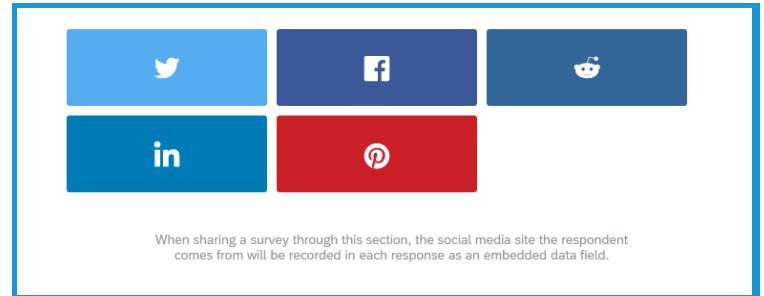1. Click **Distributions** at the top of the survey's edit page.

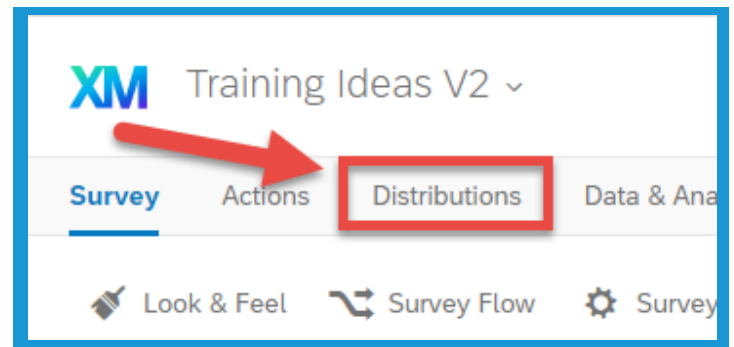2. Click **Social Media** on the left side of the screen.

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.

When sharing a survey through this section, the social media site the respondent comes from will be recorded in each response as an embedded data field.
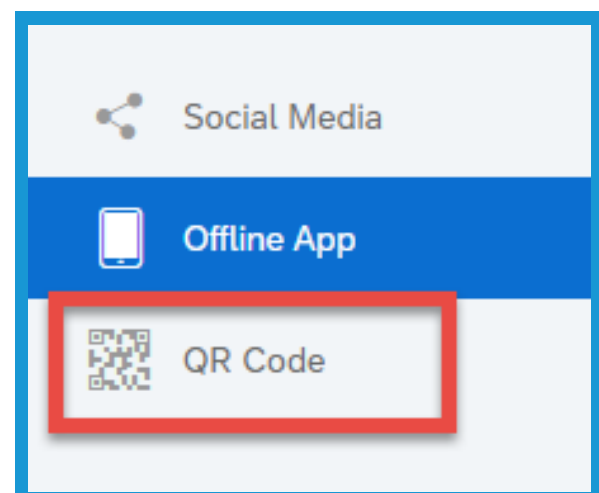
Section 5f: Distribution - QR Code

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

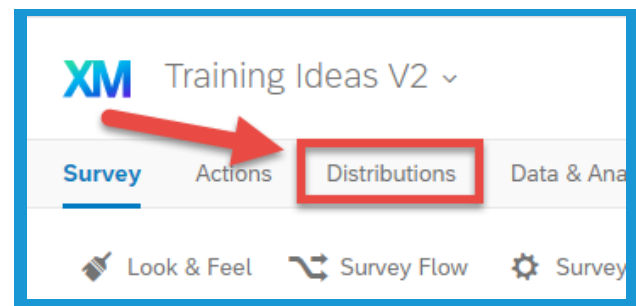2. Click **QR Code** on the left side of the screen.

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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.
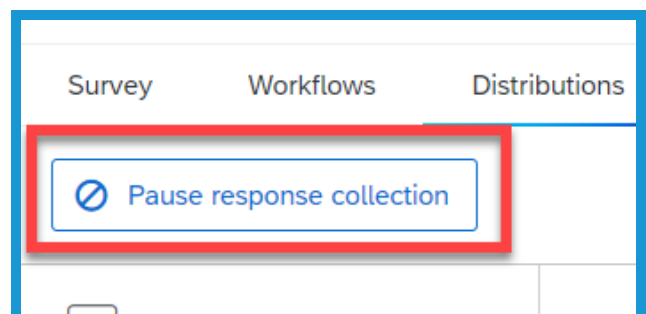
Section 5g: Distribution - Pausing Collection

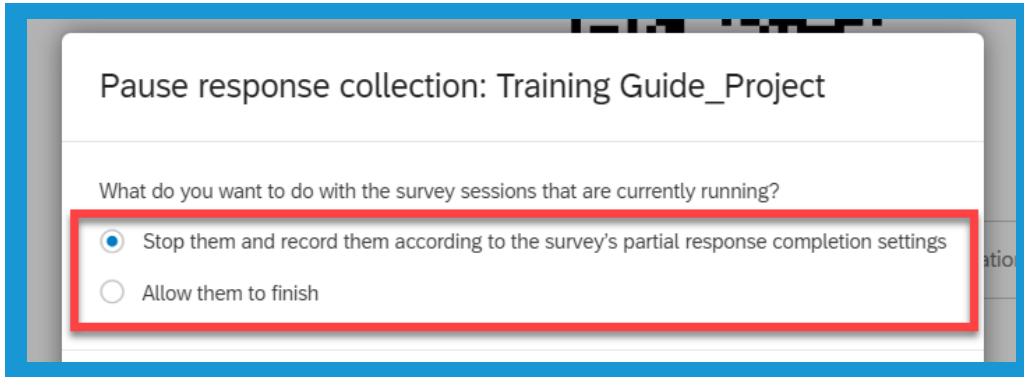1. Click **Distributions** at the top of the survey's edit page.

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

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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.
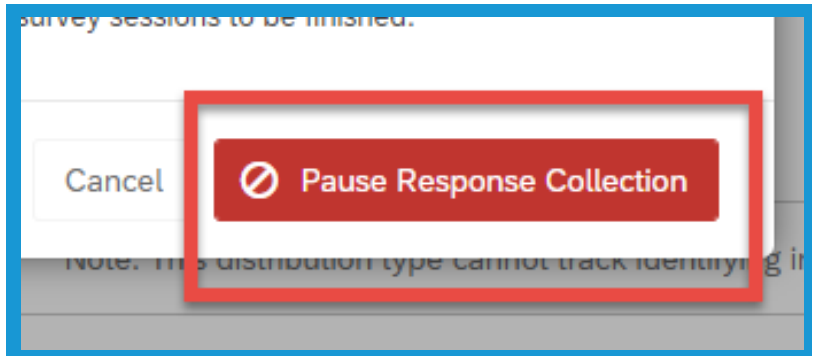

4. Click **Pause Response Collection** to disable the survey links.

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

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Qualtrics
Part 2: Getting Started

Any questions or training request:
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