

University of Minnesota

## Self-Help Guide

# Qualtrics: Create, Customize, and Manage Surveys

This self-help guide is a starting point and resource for students, faculty, and staff who would like to use Qualtrics to develop survey projects. Many of the common features used by University Qualtrics users are on this page. However, this is not an exhaustive list of all Qualtrics functionalities.

University Qualtrics users can find additional helpful resources on the [Qualtrics service page](#) including: links to community groups, a technology overview, costs for the tool, and contact information for support.

## Plan and Construct Your Survey

### Preparing for a Survey

### Manage Your Qualtrics Account

Understand the University's Qualtrics acceptable use and data security policies  
<https://it.umn.edu/services-technologies/resources/qualtrics-acceptable-use-dat...>

Activate your University Qualtrics account

<https://it.umn.edu/services-technologies/how-tos/qualtrics-activate-umn-qualtri...>

Migrate your Qualtrics account from one institution to another

<https://it.umn.edu/services-technologies/how-tos/qualtrics-manage-account>

Log in to your active University of Minnesota Qualtrics account

<https://umn.qualtrics.com>

Access Qualtrics and Canvas integration tools (Qualtrics LTI)

<https://it.umn.edu/services-technologies/how-tos/canvas-integrate-surveys-using...>

## **Plan a Survey**

Establish survey objectives and sampling design

<https://it.umn.edu/services-technologies/good-practices/survey-project-design>

Design accessible survey questions

<https://it.umn.edu/services-technologies/resources/qualtrics-designing-accessib...>

Explore online survey respondent pools

<https://it.umn.edu/services-technologies/how-tos/qualtrics-recruit-survey-parti...>

Get approval for surveying University populations

<https://it.umn.edu/services-technologies/resources/qualtrics-survey-project-app...>

## **Building a Survey**

### **Create a Survey**

Navigate the Qualtrics projects homepage

<https://www.qualtrics.com/support/survey-platform/my-projects/my-projects-overv...>

Use the Qualtrics survey builder

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-module-0...>

Edit a survey's browser tab display name

<https://www.qualtrics.com/support/survey-platform/survey-module/renaming-your-S...>

Turn on a survey's 'Back' button

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-options/...>

Edit the 'end of survey' message

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-options/...>

Use Qualtrics' translation feature

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-tools/tr...>

Program a digitally accessible Qualtrics survey

<https://it.umn.edu/services-technologies/resources/qualtrics-designing-accessib...>

### **Add Questions**

Explore available Qualtrics question types

<https://www.qualtrics.com/support/survey-platform/survey-module/editing-questio...>

Add and edit survey questions

<https://www.qualtrics.com/support/survey-platform/survey-module/editing-questio...>

Add graphics to a survey question

<https://www.qualtrics.com/support/survey-platform/survey-module/editing-questio...>

## **Set Question Behavior**

Determine which survey questions meet digital accessibility guidelines

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-tools/ch...>

Format survey questions

<https://www.qualtrics.com/support/survey-platform/survey-module/editing-questio...>

Add question response requirements and validation

<https://www.qualtrics.com/support/survey-platform/survey-module/editing-questio...>

Enhance questions for mobile compatibility

<https://www.qualtrics.com/support/survey-platform/survey-module/mobile-survey-0...>

Customize survey question recode values

<https://www.qualtrics.com/support/survey-platform/survey-module/question-option...>

## **Determine Security and Authentication Settings**

Set survey security options

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-options/...>

Require authentication to enter a survey

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/adv...>

Add SSO authentication for University respondents

<https://it.umn.edu/services-technologies/how-tos/qualtrics-how-do-i-require-peo...>

## **Publish and Test a Survey**

Preview a survey

<https://www.qualtrics.com/support/survey-platform/survey-module/preview-survey/...>

Publish a survey and view version history

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-publishi...>

Generate survey test responses

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-tools/ge...>

Export survey content and metadata to Microsoft Word

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-tools/im...>

## Working with Other Qualtrics Users

### Collaborate on a Survey

Share a survey with other University Qualtrics users

<https://www.qualtrics.com/support/survey-platform/my-projects/sharing-a-project...>

Share contact lists and libraries with other University Qualtrics users

<https://it.umn.edu/services-technologies/how-tos/qualtrics-use-manage-user-grou...>

Transfer survey ownership from one user to another user

<https://it.umn.edu/services-technologies/how-tos/qualtrics-transfer-ownership-q...>

## Integrating Qualtrics with Other Tools

### Use Workflows

Understand Qualtrics workflows basics

<https://www.qualtrics.com/support/survey-platform/actions-module/setting-up-act...>

Modify Qualtrics workflow settings

<https://www.qualtrics.com/support/survey-platform/actions-page/workflow-setting...>

Send follow-up emails automatically using the email workflow task

<https://www.qualtrics.com/support/survey-platform/actions-module/email-task/>

Add or update contacts in a mailing list using the XM Directory task

<https://www.qualtrics.com/support/survey-platform/actions-module/xm-directory-t...>

Export Qualtrics data using the Google sheets task

<https://www.qualtrics.com/support/survey-platform/actions-page/tasks/google-she...>

Send payments automatically using the incentive workflow task (DesignXM only)

<https://www.qualtrics.com/support/survey-platform/actions-module/single-instanc...>

### Use the Qualtrics API

Request access to the Qualtrics API by contacting [survey@umn.edu](mailto:survey@umn.edu)

Get started with the Qualtrics API

<https://www.qualtrics.com/support/integrations/api-integration/overview/>

Explore Qualtrics API documentation

<https://api.qualtrics.com/>

Explore the Qualtrics JavaScript question API

<https://api.qualtrics.com/82bd4d5c331f1-qualtrics-java-script-question-api-class>

## **Use Customization Features**

### **Customizing Survey Appearance**

#### **Manage a Survey's Appearance**

Understand University survey branding requirements

<https://university-relations.umn.edu/resources/surveys>

Explore the survey "Look and Feel" menu

<https://www.qualtrics.com/support/survey-platform/survey-module/look-feel/look-...>

Ensure a survey's "Look and Feel" is accessible

<https://it.umn.edu/services-technologies/resources/qualtrics-designing-accessib...>

Add custom CSS to your survey

<https://www.qualtrics.com/support/survey-platform/survey-module/look-feel/fonts...>

### **Customizing Survey Behavior**

#### **Customize Survey Flow**

Explore the functionality of the Survey Flow menu

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/sur...>

Change the order of a survey's question blocks

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/sta...>

Display blocks only when specific conditions are met

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/sta...>

Customize survey endings based on different conditions

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/sta...>

#### **Add Display Logic**

Add question display logic

<https://www.qualtrics.com/support/survey-platform/survey-module/question-option...>

Add answer choice display logic

<https://www.qualtrics.com/support/survey-platform/survey-module/question-option...>

Add question skip logic

<https://www.qualtrics.com/support/survey-platform/survey-module/question-option...>

Add question block display (branch) logic

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/sta...>

## **Add Randomization**

Randomize the order of answer choices within a question

<https://www.qualtrics.com/support/survey-platform/survey-module/question-option...>

Randomize the order of questions within a block

<https://www.qualtrics.com/support/survey-platform/survey-module/block-options/q...>

Randomize the order of question blocks

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/sta...>

## **Use Piped Text**

Understand piped text basics

<https://www.qualtrics.com/support/survey-platform/survey-module/editing-questio...>

Pipe respondent's response from an earlier question into later survey questions

<https://www.qualtrics.com/support/survey-platform/survey-module/editing-questio...>

Pipe data from a mailing list field into a survey question

<https://www.qualtrics.com/support/survey-platform/survey-module/editing-questio...>

Pipe embedded data into a survey question

<https://www.qualtrics.com/support/survey-platform/survey-module/editing-questio...>

Pipe current or past date and time into a survey question

<https://www.qualtrics.com/support/survey-platform/survey-module/editing-questio...>

## **Use Embedded Data**

Understand embedded data basics

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/sta...>

Add an embedded data element to your survey flow

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/sta...>

Pull in data from a Qualtrics mailing list as embedded data

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/sta...>

Set embedded data values from the survey URL

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/sta...>

## **Use Quotas**

Set quota conditions

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-tools/qu...>

Specify what happens when a quota is met

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-tools/qu...>

Limit total responses to a survey

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-tools/qu...>

## **Use Custom JavaScript**

Add JavaScript to a Qualtrics question

<https://www.qualtrics.com/support/survey-platform/survey-module/question-option...>

Explore the Qualtrics JavaScript question API

<https://api.qualtrics.com/82bd4d5c331f1-qualtrics-java-script-question-api-class>

# **Distribute Your Survey and Manage Results**

## **Distributing a Survey**

### **Explore Survey Distribution Options**

Explore Qualtrics survey distribution options

<https://www.qualtrics.com/support/survey-platform/distributions-module/distribu...>

Using the 'Anonymous' survey link

<https://www.qualtrics.com/support/survey-platform/distributions-module/web-dist...>

Specify how and when responses are recorded

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-options/...>

Automatically add respondent survey information to a Qualtrics mailing list

<https://www.qualtrics.com/support/survey-platform/actions-module/xm-directory-t...>

### **Distribute a Survey via Email**

Understand University mass-email requirements

<https://university-relations.umn.edu/resources/mass-email-requirements>

Create a Qualtrics mailing list

<https://www.qualtrics.com/support/iq-directory/lists-tab/creating-mailing-lists/>

Create University-branded emails within Qualtrics

<https://it.umn.edu/services-technologies/how-tos/set-university-branded-email-u...>

Distribute a Survey via Email with the Qualtrics Mailer

</services-technologies/resources/qualtrics-distribute-survey-email>

## **Distribute a Survey via SMS**

Understand the University's Qualtrics SMS distribution requirements

<https://it.umn.edu/services-technologies/resources/qualtrics-use-sms-distributi...>

Send Qualtrics survey invitations via SMS

<https://it.umn.edu/services-technologies/resources/qualtrics-use-sms-distributi...>

Request access to Qualtrics SMS distribution functionality

[https://umn.qualtrics.com/jfe/form/SV\\_cw02I4ZiDaKNZj](https://umn.qualtrics.com/jfe/form/SV_cw02I4ZiDaKNZj)

Request Qualtrics SMS credits

[https://umn.qualtrics.com/jfe/form/SV\\_e8KQEKVIANUXCQt](https://umn.qualtrics.com/jfe/form/SV_e8KQEKVIANUXCQt)

Import phone numbers to a mailing list for SMS distribution

<https://www.qualtrics.com/support/survey-platform/distributions-module/mobile-d...>

## **Use Distribution Automations (DesignXM Only)**

Understand Qualtrics DesignXM features

<https://it.umn.edu/services-technologies/resources/qualtrics-designxm>

Request access to Qualtrics DesignXM features

<https://it.umn.edu/services-technologies/resources/qualtrics-designxm>

Use distribution automations

<https://www.qualtrics.com/support/iq-directory/automations/distribution-automat...>

Use contact list import automations

<https://www.qualtrics.com/support/iq-directory/automations/contact-import-autom...>

Edit and manage directory automations

<https://www.qualtrics.com/support/iq-directory/automations/managing-automations/>

Explore directory automations best practices

<https://www.qualtrics.com/support/iq-directory/automations/automations-best-pra...>

## **Managing Responses**

### **Collect Responses**

Start response collection

<https://www.qualtrics.com/support/survey-platform/distributions-module/collecti...>

Pause response collection

<https://www.qualtrics.com/support/survey-platform/distributions-module/collecti...>

Set a survey's availability window

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-options/...>

Specify how incomplete survey responses are handled

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-options/...>

Create a survey 'Retake' link

<https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/reta...>

## **Monitor Responses in Real Time**

Monitor responses in the 'Data & Analysis' tab

<https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data...>

View collected responses using filters

<https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data...>

Identify incomplete responses in a dataset

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-options/...>

Closing responses in progress

<https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data...>

Get email notifications about responses with the email workflow task

<https://www.qualtrics.com/support/survey-platform/actions-module/email-task/>

## **Working with Collected Data**

### **Export Survey Data**

Export collected survey responses

<https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data...>

Understand different ways to export Qualtrics data

<https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data...>

Understand your exported Qualtrics dataset

<https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data...>

Export survey content and metadata to Microsoft Word

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-tools/im...>

Automatically export data to Google sheets

<https://www.qualtrics.com/support/survey-platform/actions-page/tasks/google-she...>

## **Analyze Data Using Tools in Qualtrics**

Use Qualtrics Stats iQ for quantitative analysis

<https://www.qualtrics.com/support/stats-iq/getting-started-with-stats-iq/overvi...>

Use Qualtrics Text iQ for text response analysis

<https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text...>

## **Create Printable Reports**

Create printable reports of survey results

<https://www.qualtrics.com/support/survey-platform/reports-module/reports-sectio...>

## **Create and Manage Results Dashboards**

Create digital dashboards of survey results

<https://www.qualtrics.com/support/survey-platform/reports-module/results-sectio...>