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-o...
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-o...
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

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_cw02I4ZiDaKNZJj
Request Qualtrics SMS credits
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...