This document shows how to access Qualtrics once you have an account, navigate through its interface, start a survey, rename a survey, copy a survey, print a survey, translate a survey into a different language, and delete a survey.

These are operations done at the “survey list” level (except for printing a survey). In other words, these are project management type-tasks separate from the actual building and distribution of a survey.

Note that this document uses the term “survey” in place of Qualtrics’ use of the term “project.”

ACCESSING QUALTRICS

- Login link: https://agrilife.az1.qualtrics.com/login

(Be sure to bookmark this link).

- After clicking the link, enter your username (your e-mail address) and password to sign in.
THE QUALTRICS INTERFACE

- Once logged in, you will see the Qualtrics dashboard as your interface as shown below.

Projects Folders (red box)

When you use Qualtrics for the first time, you will just see an “Uncategorized” folder. All of your surveys will go into this folder by default. Once you create custom folders to better organize your surveys (as done above), you will see the list of your folders and the number of surveys in each folder on the left side. Use the link “Add new folder” and the simply drag and drop surveys into your custom folders as appropriate.

Listing of Projects (green box)

To the right of the project folders is the list of your surveys. For each one, Qualtrics provides the survey name, last modified date, status (new, active, or closed), creation date, and number of responses from participants.

Start a New Survey Project (orange box)

Click on the blue button at the top right labeled “Create new project” to start a new survey. Also to the left of this button is a search box if your list of surveys is large and you want to narrow the listing.

Project Tasks (black box)

The “three dots” on the right hand side of each survey provides access to several tasks (explained on next page).
Survey Tasks (Collaborate, Rename, Copy, Edit, Translate a Survey)

On the right of each survey are “three dots” as shown to the right. Click on it to see a list of survey tasks (shown below) you can perform. Each of the tasks are self-explanatory and intuitive.

- Close
- Collaborate
- Rename project
- Copy project
- Remove shared project
- Edit survey
- Preview survey
- Translate survey
- Distribute survey
- Data & Analysis
- View reports
- Delete project

Close (or Activate) – This allows you to change the status of a survey. The choice available to you depends on the current status of the survey.

Collaborate – Use this to share the survey with others using an email address. You can assign different permissions to each collaborator. Use “Remove shared project” to remove a survey that someone else shared with you.

Rename – just as it says.

Copy – just as it says.

Preview – to get a quick view of the survey plus how it will look on a smart phone.

Edit – just as it says. Be aware that you will receive a warning if trying to edit an active (ongoing) survey. You do not want to make any edits that might affect the existing data of an active survey. Editing a title or grammar is fine.

Translate – just as it says including into Spanish. It is advisable to check the quality of the translation. The new translation is available via a pull-down at the top right portion of the survey.

Distribute, Data & Analysis, View Reports – these are the same options on the top-level menu of the dashboard.

Delete – just as it says. You will be warned about losing the survey and the data. Be sure you really want to do this.
Printing a Survey

Surprisingly, printing a survey is not one of the survey tasks available via the “three dots.”

Instead, to print an individual survey (which many find easier to review than on the screen), you must first access the survey itself by clicking on it from the opening dashboard. This takes you to the Editing mode. From here, click on Tools; then Import/Export. “Print Survey” is now one of your options.
**Alternative View of Dashboard**

You can use an alternative view of the opening dashboard by clicking the icon shown by the red arrow below. This shows the number of questions for a survey, number of responses, and 12-day trend for active surveys. For new surveys, it will show the number of languages translations for the survey and the estimated time it will take a participant to complete the survey.

To return to the previous view of the dashboard, click on the icon to the right (shown by the black arrow).

Finally, the Library and Help functions are available at the top right.

**Library** – Use this to store and access common questions and sections of survey (called blocks). When you start adding new questions to a survey, “adding from the library” is an option in addition to typing in a question and response categories yourself.

**Help** – This provides access to the vast array of help resources provided by Qualtrics.