

# THE QUALTRIC INTERFACE

## April 2020

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.

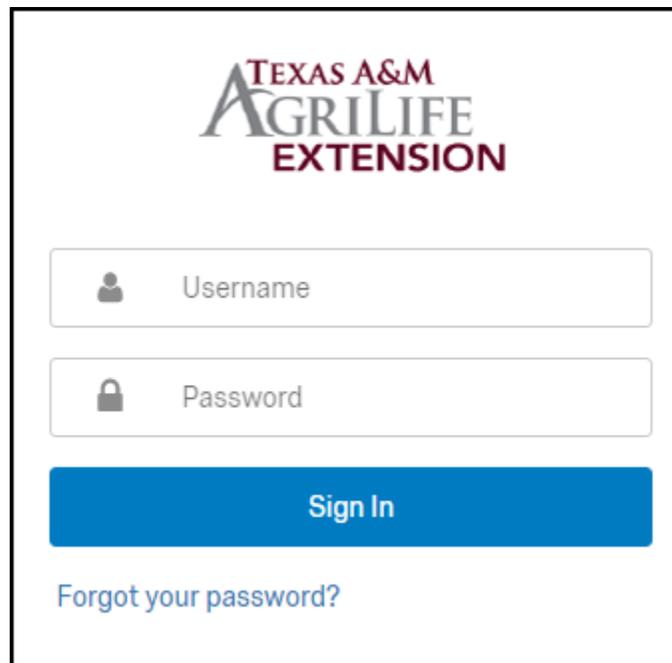
Note that this document uses the term “survey” in place of Qualtrics’ use of the term “project.”

### ACCESSING QUALTRICS

- Login link: <https://agrillife.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 screenshot shows the login page for Texas A&M Agrilife Extension. At the top center is the logo, which consists of the text "TEXAS A&M" in a small, dark font, "AGRILIFE" in a large, stylized, dark font, and "EXTENSION" in a medium-sized, dark font below it. Below the logo are two input fields. The first field is labeled "Username" and has a small person icon to its left. The second field is labeled "Password" and has a small padlock icon to its left. Below these fields is a blue button with the text "Sign In" in white. At the bottom left of the form area, there is a link that says "Forgot your password?" in a blue, underlined font.

## THE QUALTRICS INTERFACE

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

The screenshot shows the Qualtrics dashboard interface. On the left, a sidebar lists project folders with their respective counts. A red box highlights this sidebar. At the top right, there is a search bar and a 'Create new project' button, both highlighted with an orange box. The main area displays a table of surveys with columns for Type, Project name, Last modified, Status, Creation date, and Responses. A green box highlights the survey list table. On the far right of the survey list, a black box highlights the 'three dots' menu for each survey row.

Type	Project name	Last modified	Status	Creation date	Responses
Survey	REGISTRATION FOR NEW EMPLOYEE ONBOARDING - Ap...	Mar 5, 2020	Active	Feb 10, 2020	60
Survey	Follow up on Building Wealth on a Ramen Noodle Budget	Nov 26, 2019	Active	Nov 25, 2019	27
Survey	Step Up Scale Down-Pre	Oct 29, 2019	Active	Oct 23, 2017	81
Survey	2019-20 ACTIVE Learn Grow Eat Go-Post	Oct 24, 2019	Active	Oct 16, 2019	1075
Survey	2019-20 ACTIVE Learn Grow Eat Go-Pre	Oct 16, 2019	Active	Jun 20, 2019	4992
Survey	HARRIS Learn Grow Eat Go-Pre	Sep 3, 2019	Active	Jul 24, 2018	160
Survey	HARRIS Learn Grow Eat Go-Post	Sep 3, 2019	Active	Jul 24, 2018	1
Survey	HARRIS Learn Grow Eat Go-Pre -Wave 2	Sep 3, 2019	Active	Dec 4, 2018	238
Survey	HARRIS Learn Grow Eat Go-Post - Wave 2	Sep 3, 2019	Active	Dec 4, 2018	175
Survey	Foundations Evaluation Name Change	Jul 3, 2019	Active	Nov 20, 2012	38
Survey	Unit 1 Evaluations	Jun 26, 2019	Active	Mar 28, 2018	100
Survey	Post Oak Landscape and Irrigation Class	Jun 20, 2019	Active	Apr 6, 2018	10

### 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 organized 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)

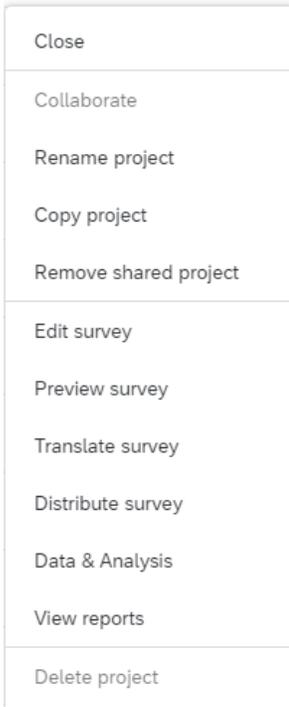
Click on the blue button at the top right labeled “Create new project” to start a new survey. Also to the left of this button is a search box if your list of surveys is large and you want to narrow the listing.

### 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 (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.

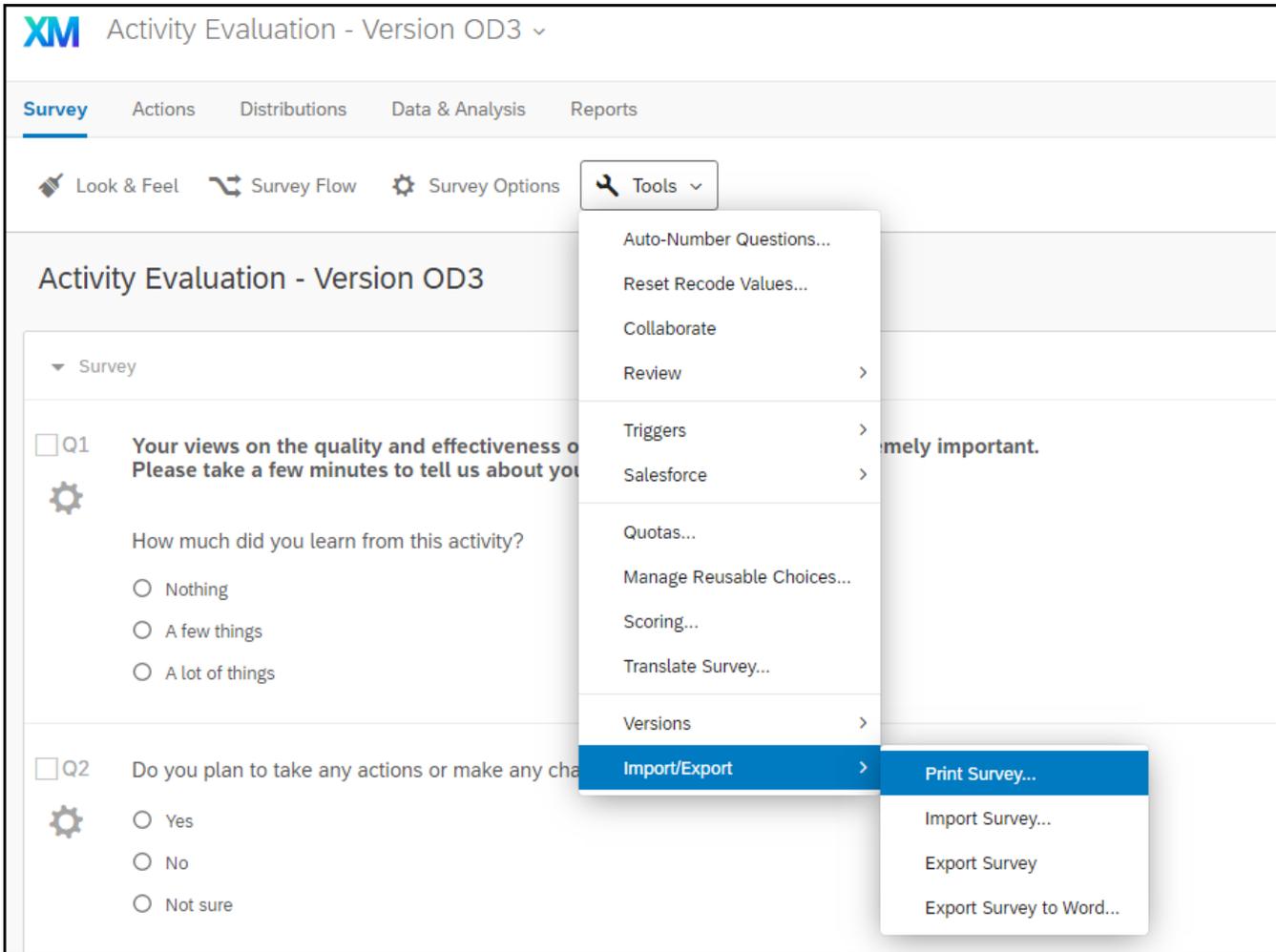
**Distribute, Data & Analysis, View Reports** – these are the same options on the top-level menu of the dashboard.

**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.

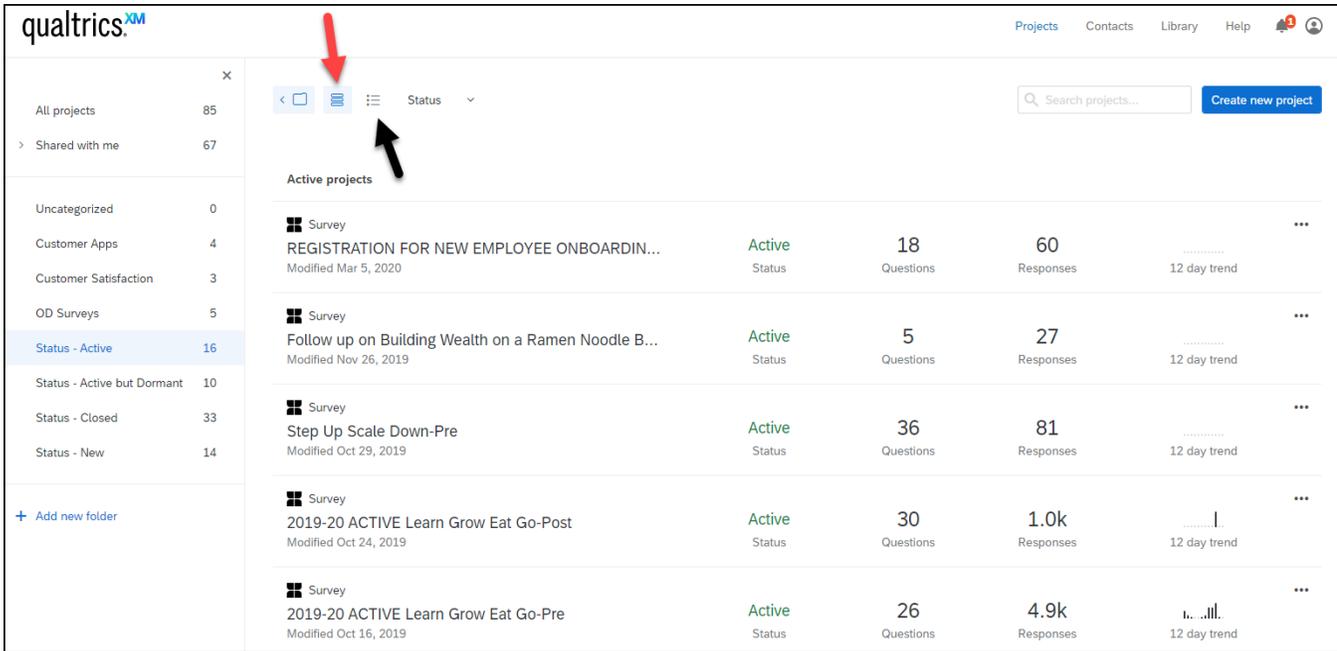


The screenshot displays the XM Survey Editor interface for a survey titled "Activity Evaluation - Version OD3". The top navigation bar includes "Survey", "Actions", "Distributions", "Data & Analysis", and "Reports". Below this, there are icons for "Look & Feel", "Survey Flow", "Survey Options", and "Tools". The "Tools" menu is open, showing options such as "Auto-Number Questions...", "Reset Recode Values...", "Collaborate", "Review", "Triggers", "Salesforce", "Quotas...", "Manage Reusable Choices...", "Scoring...", "Translate Survey...", and "Versions". The "Import/Export" option is highlighted in blue, and its sub-menu is also open, showing "Print Survey...", "Import Survey...", "Export Survey", and "Export Survey to Word...". The "Print Survey..." option is highlighted in blue. The main content area shows two survey questions: Q1, "Your views on the quality and effectiveness of... Please take a few minutes to tell us about you...", and Q2, "Do you plan to take any actions or make any cha...".

## 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).



The screenshot shows the Qualtrics XM dashboard interface. On the left is a navigation sidebar with categories like 'All projects', 'Shared with me', 'Uncategorized', 'Customer Apps', 'Customer Satisfaction', 'OD Surveys', 'Status - Active', 'Status - Active but Dormant', 'Status - Closed', and 'Status - New'. The main area displays a list of 'Active projects' with columns for 'Survey', 'Status', 'Questions', 'Responses', and '12 day trend'. A red arrow points to the 'Active projects' icon in the top navigation bar, and a black arrow points to the 'List view' icon.

Survey	Status	Questions	Responses	12 day trend
REGISTRATION FOR NEW EMPLOYEE ONBOARDIN... Modified Mar 5, 2020	Active	18	60	.....
Follow up on Building Wealth on a Ramen Noodle B... Modified Nov 26, 2019	Active	5	27	.....
Step Up Scale Down-Pre Modified Oct 29, 2019	Active	36	81	.....
2019-20 ACTIVE Learn Grow Eat Go-Post Modified Oct 24, 2019	Active	30	1.0k	.....
2019-20 ACTIVE Learn Grow Eat Go-Pre Modified Oct 16, 2019	Active	26	4.9k	.....

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.