

# Qualtrics Survey Tool @ Kenyon

A Beginner's Guide

# Creating an Account/Logging-In

- Go to [kenyon.qualtrics.com](https://kenyon.qualtrics.com).
- Log in with your Kenyon credentials (username and password).
- This will take you to the “My Projects” page. To navigate to other pages, click the menu icon in the top left corner.
- Once you’ve created an account you will not automatically have access to create a survey until you sign off on the Qualtrics access form.

# Creating a Survey

- To create a survey:
  - Click the “Create New Project” button in the “My Projects” tab.
- To create a survey from scratch:
  - Select the “Survey” option and click “Create Project”.
- To create a survey from a copy:
  - Select the “Survey” option. Under the “How do you want to start your survey?” drop-down menu, select “Copy a survey from an existing project”. Then click “Create Project”.
- To create a survey from a pre-made template:
  - Select any of Qualtrics’ pre-made templates.

# Survey Questions

- To create a new question:
  - Select “Add new question” at the bottom of the survey.
- To delete an existing question:
  - Select the question and click the red ‘minus’ button that appears to the left.
- To edit the text of a survey:
  - Click the field of text you would like to edit and begin typing.
- To edit the type of question:
  - Select from the “Question Type” dropdown menu on the left toolbar.

# Survey Questions (cont.)

- To select multiple questions, click the checkboxes in the upper-left corner of each question. Once you have selected them, you can do the following things:
  - *Delete questions*: Deletes multiple questions at once
  - *Copy questions*: Copies multiple questions at once
  - *Move questions*: Moves the selected questions as a unit
  - *Create new block*: Moves selected questions to a new block
- To require respondents to answer a given question:
  - Navigate to the left toolbar, select “Add Requirements”, then select “Force Responses”.

# Survey Questions (cont. 2)

- To import a question from another survey:
  - Select “import from library” at the bottom of your questions.
  - Select a question (or select multiple questions using Cntrl+Shift/Cmd+Shift).

# Managing Survey Folders

- To create a new folder:
  - Select “Add a New Folder”.
- To rename or delete a folder:
  - Move the mouse over the folder and select the settings icon.
- To move a survey into the folder:
  - Click and drag the survey from the right box to desired folder on the left box.
- To view the contents of an existing folder:
  - To view the contents on an existing folder, select the folder’s name from the list on the left. The surveys will be displayed in the right box.

# Collaboration

- One of the cool things Qualtrics lets you do is collaborate on surveys with other users, sharing editing and distribution responsibilities and all having permission to view the survey results.
  - In the My Surveys tab, find the survey you wish to collaborate on and select the menu in the top left corner of the survey (signified by three dots) and select collaborate.
  - From here, there are two choices: You can either collaborate with someone already in the same organization as you (i.e., Kenyon), or you can invite a specific person to collaborate on a given survey.
  - If you do not see the button, check with an administrator to make sure your account has permission to collaborate.



# Collaboration (cont.)

- To collaborate with someone outside your organization or with someone who doesn't have a Qualtrics account, you will need to send them a collaboration invitation. He/she will need to accept it before seeing the survey.
- To send the invitation:
  - Enter the collaborator's email address, then click 'Add.'
  - Enter a personalized message and click 'OK.'
  - Under the 'Edit' and 'View Results' link, place a check mark next to items you would like your collaborator to have access to.
- To accept a shared survey:
  - Open the email invitation.
  - Log in to Qualtrics, either an existing account or by registering for a new one.
  - Click 'Accept Shared Survey,' then enter the code in the email.
  - Click 'Accept.' Now you will be able to see the survey.

# Other Resources

- Qualtrics provides very good training resources. To access them, simply log-in to your Qualtrics account and click on the yellow “Help and Tutorials” button at the top right hand of the page. This will take you to Qualtrics University or you can click here:  
<http://www.qualtrics.com/university/researchsuite/>
- You can search by topic or take the “Learn Qualtrics in 5 Steps” training.
- If you have further questions to which you can’t find answers, please contact Erika Farfan [farfane@kenyon.edu](mailto:farfane@kenyon.edu)