

Qualtrics Survey Tool @ Kenyon

A Beginner's Guide



Creating an Account/Logging-In

- Go to <https://sso.kenyon.edu/>
- 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:
 - Go to the “My Projects” tab and click the “Create New Project” button in the upper right corner
- To create a survey from scratch:
 - Select the “Survey” option and click “Get Started” in the lower right corner
- To create a survey from a copy:
 - Go to the “Projects” page, find the survey you’d like to copy, click the **three dots** to the right of the survey, click “Copy Project”
- To create a survey from a premade template:
 - Go to the “My Projects” tab and select any of the premade 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*”
- 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 downward arrow, make desired changes
- To move a survey into the folder:
 - Click the three dots on the left hand side of the project name, click the “Move too...” option and move project to the desired folder
- To view the contents of an existing folder:
 - Select “Library” from the menu bar and then select desired folder to view contents of

Collaboration

- One of the cool things Qualtrics lets you do is collaborate on surveys with other users, you can share responsibilities and all have permission to view the survey results
 - In the [Projects](#) tab, find the survey you wish to collaborate on and select the [three dots](#) to the right of survey name, 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. They 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 checkmark 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)