

## Qualtrics Insight Quick Start Guide

The new Qualtrics Insight Platform helps you connect data and drive outcomes. The new layout and design, as well as many other new features, can help you simplify and streamline your workflow. Also, the new user interface lays the foundation for a new way of managing your projects through Qualtrics.

**Note:** When you first sign-in to KSU Qualtrics, the *All Projects* landing page will appear (See Figure 1).

### Creating a Project

When you first sign-in to KSU Qualtrics, the *All Projects* landing page will appear. In Qualtrics, surveys are now called *Projects*.

1. To get started, select **Create new project** (See Figure 1).

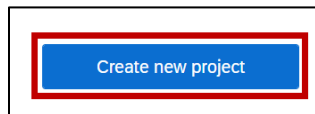


Figure 1 - Create Survey Project

**Note:** Once you click **Create new project** there will be additional options available to you.

2. The *Catalog* pop-up window will appear. Under the heading *Projects from scratch*, select the **Survey** box (See Figure 2).

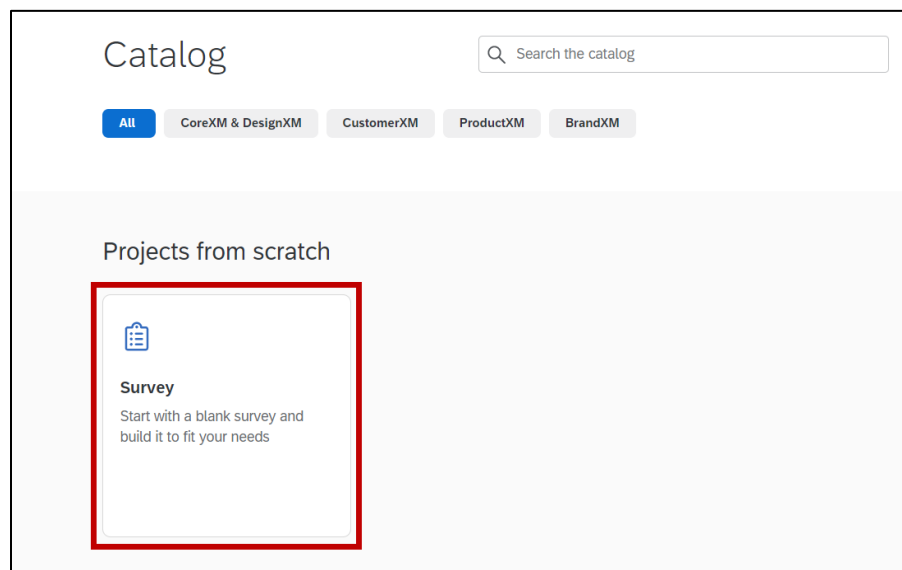


Figure 2 – Create New Survey

3. A sliding menu on the right-hand side of the screen will appear. Scroll down, then click **Get Started** (See Figure 3).

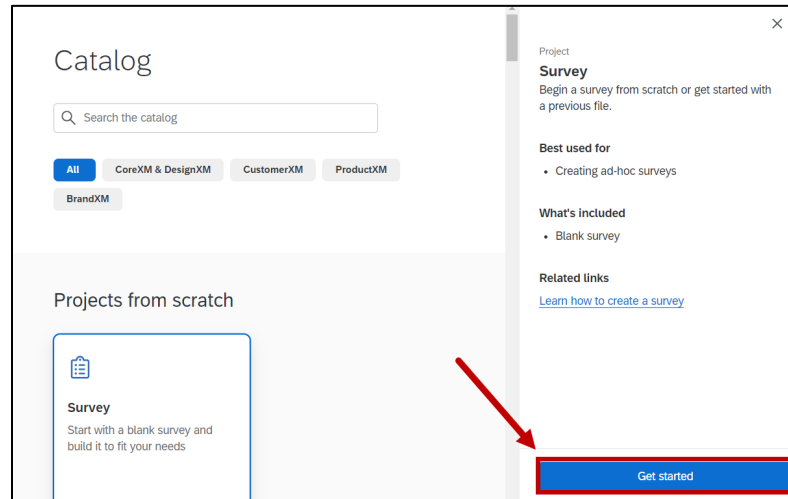


Figure 3 – Get Started

4. The survey window will appear. First, type the name of your project into the **Name** field (See Figure 4).

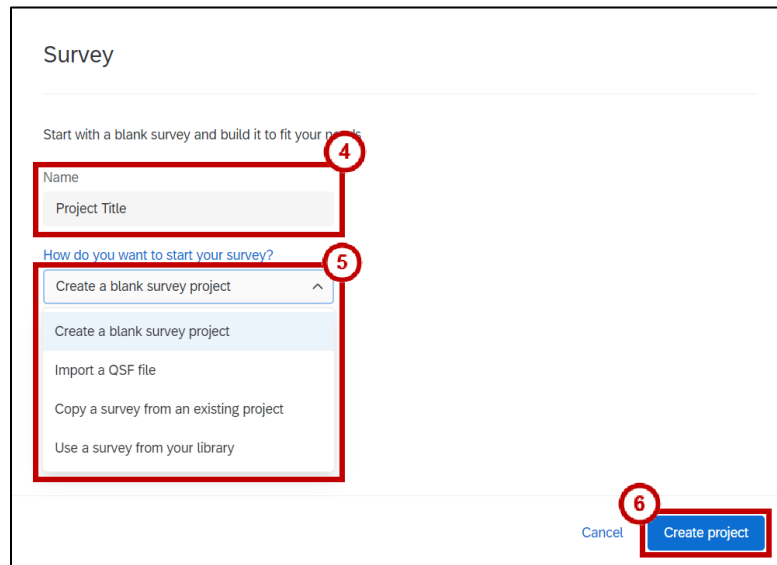


Figure 4 - Blank Project

5. Next, select the dropdown menu, then choose from the following selection (See Figure 4):
- Create a blank survey project
  - Import a QSF file
  - Copy a survey from an existing project
  - Use a survey from your library

**Note:** For this example, select the **Create a blank survey project** button from the dropdown menu.

6. Select **Create project** (See Figure 4).

7. The *Survey Module* appears. You are now ready to add questions to your survey (See Figure 5).

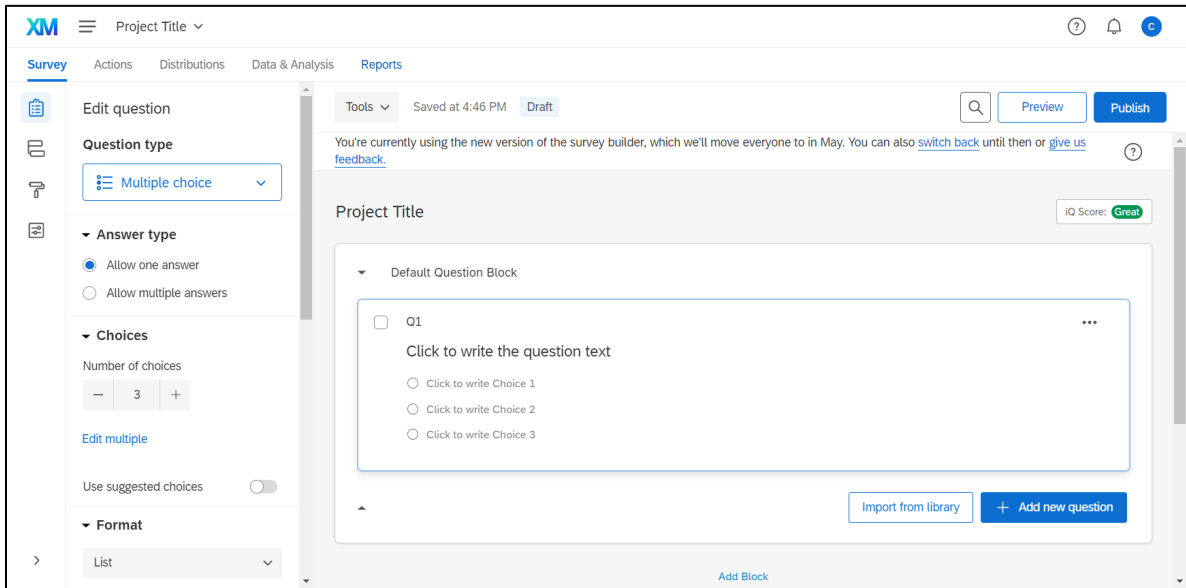


Figure 5 - Survey Module

## The Survey Module Interface

The Survey Module is the area where you build your survey. The following details the interface:

- Survey Module Tab** - Area for you to build and edit your survey (See Figure 6).
- Question Text & Answers** - Click on the placeholder text to edit (See Figure 6).
- Blue Plus Signs** - Allows you to add questions before or after the current question (See Figure 6).
- Red Minus Sign** - Click this to delete the current question (See Figure 6).
- Add New Questions** - Allows you to add more questions to your survey (See Figure 6).
- Question Editing Pane** - Contains options and settings for selected question (See Figure 6).
- Preview** - Click this button to preview your survey (See Figure 6).

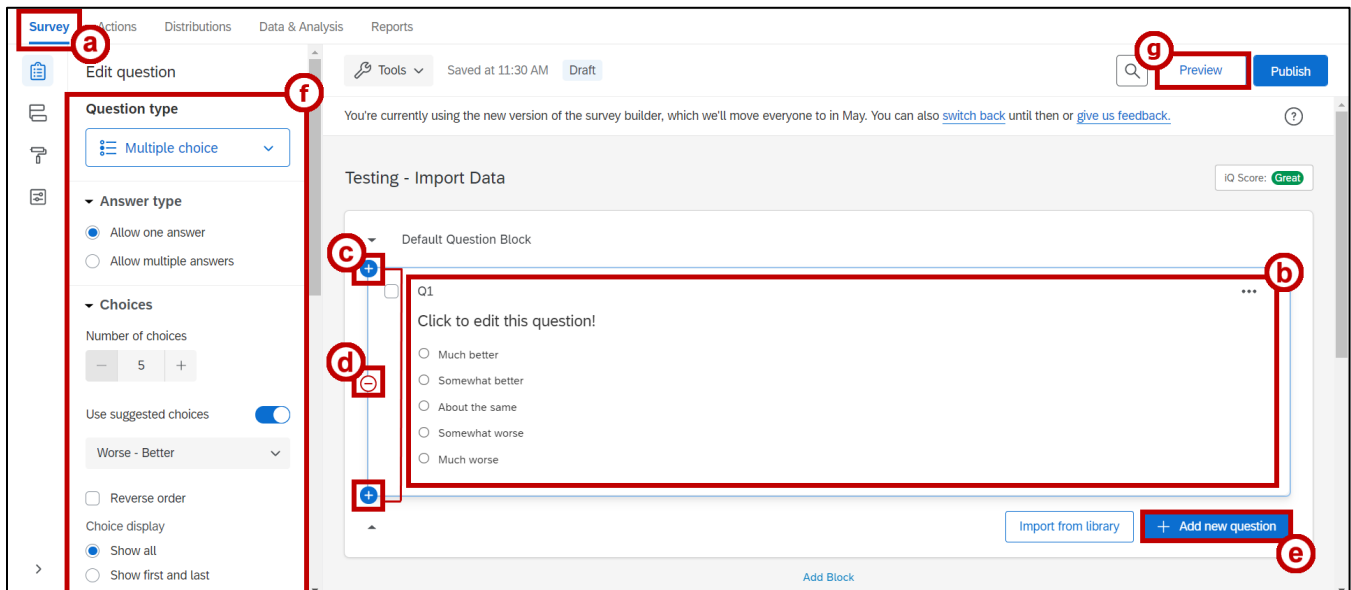


Figure 6 - Survey Module Interface

## Distributing Your Survey

To begin collecting responses from your survey, you must first distribute it to the desired participants. The following explains how to distribute your survey using an anonymous link:

1. From within your survey, click on the **Distributions** tab in the top navigation bar (See Figure 7).

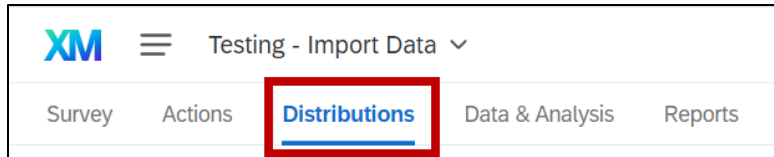


Figure 7 - Distribute Survey Tab

2. Select the **Distribute** survey button in the right-hand corner of the screen (See Figure 8).

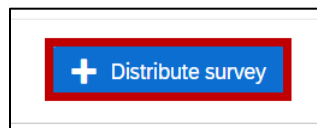


Figure 8 - Distribute Survey Tab

3. You have the following email options available (See Figure 9):

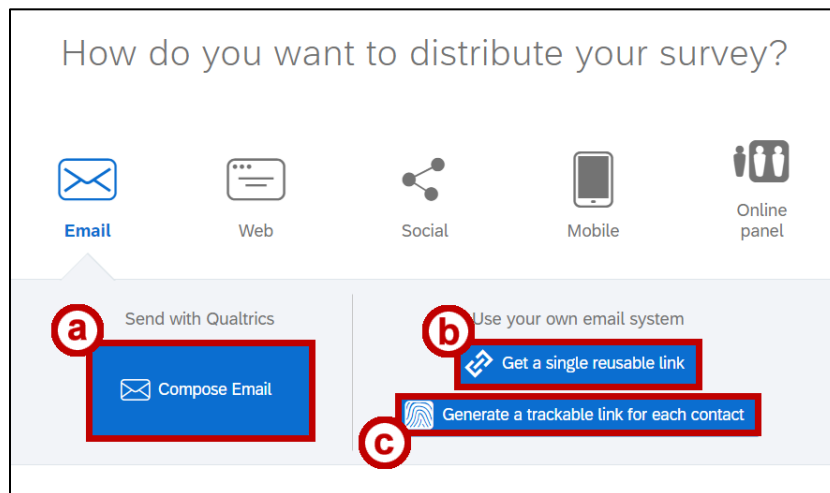


Figure 9 - Distribute Survey Tab

- a. Compose Email
  - b. Get a single reusable link
  - c. Generate a trackable link for each contact
4. From the *Email* options, we will select **Get a single reusable link** (See Figure 9), which will create a non-traceable anonymous link.
  5. The anonymous link will be generated. Copy and paste the **anonymous link** into your personal email, or you can place it on your website or social media page (See Figure 10).

6. Select the **Emails** tab if you wish to send your survey to a selected list of participants (See Figure 10).

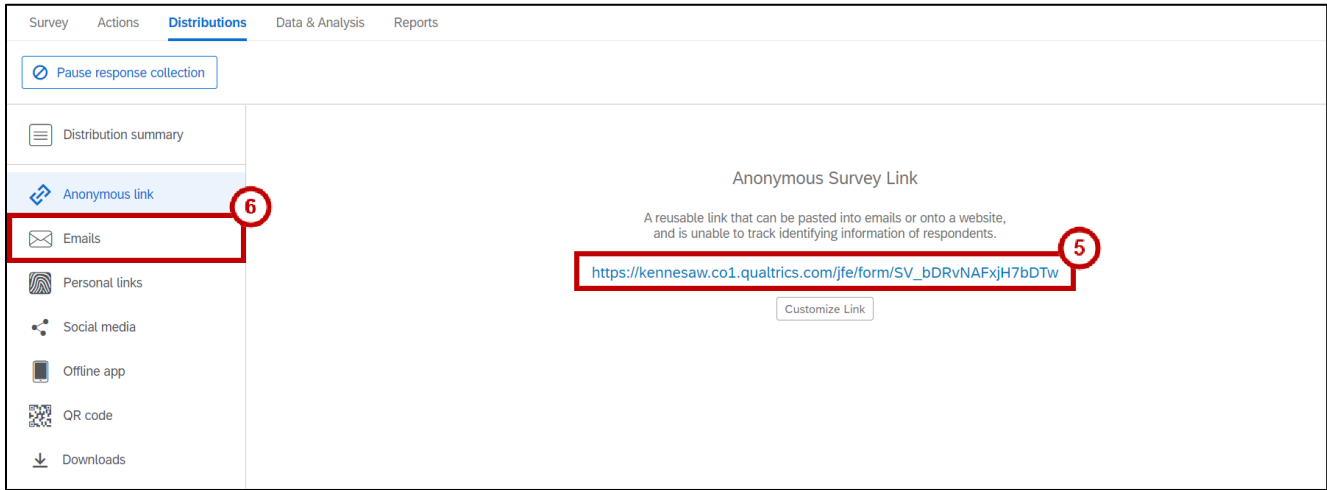


Figure 10 - Anonymous Link and Email

## Data & Analysis

This module allows you to view and manage all individual survey responses. The following shows you how to access this module:

1. Click the **Data & Analysis** tab (See Figure 11).
2. The *Data & Analysis* module opens. You will be able to see the following:

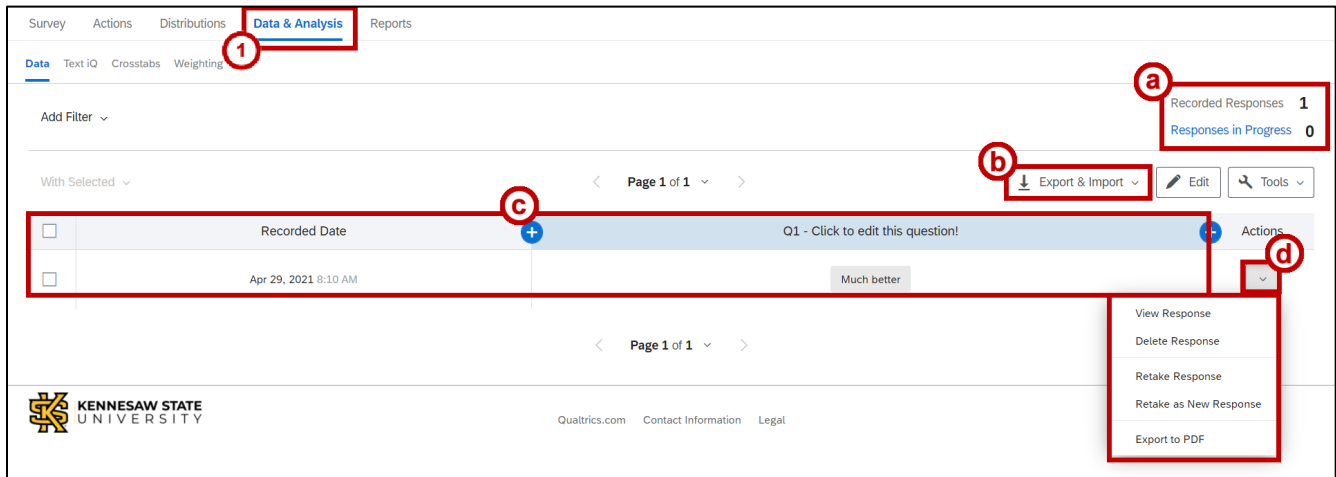


Figure 11 - Data & Analysis Module

- Response Status** - indicates the number of recorded responses or responses in progress (See Figure 11).
- Export/Import** - allows you to export as CSV or XML, or import your responses for outside analysis (See Figure 11).
- Response(s)** - area where all recorded survey responses reside (See Figure 11).
- Response Actions Drop-Down Arrow:** allows you to select an individual response, and choose to view one of the following: **View Response**, **Delete Response**, **Retake Response**, **Retake as New Response**, and **Export to PDF** (See Figure 11).

## Reports Module

The Reports module allows you to easily, view, explore, and analyze your collected data. The following explains more about the Reports Module Interface:

1. To access the Reports Module, click the **Reports** tab (See Figure 12).
2. The **Page list** is located on the left. It contains the following (See Figure 12):
  - a. **Create Custom Page** - allows you to create custom pages to suit your needs, by further exploring or arranging your survey results (See Figure 12).
  - b. **Question Pages** - default pages made for each one of your questions. Each page has interactive charts, called visualizations (See Figure 12).
3. **Question & Answer** – Click on the question/answer box to access more options. Once clicked, a scrolling menu will display on the right-hand side of the screen (See Figure 12).
4. **Data Source** - Use this drop-down when you want the visualization to show a different question (See Figure 12).
5. **Visualization Options** – Use the right-hand scrolling menu to access the following options:
  - a. **Visualization Type** - This allows you to select a new visualization for the data collected. Select any of these icons to change the visualization type: **Tables, Bar, Line or Pie Charts, Word Clouds, Gauges, Break-Down Bars** and more (See Figure 12).
  - b. **Color Palette** – choose from several color options for your visualization (See Figure 12).

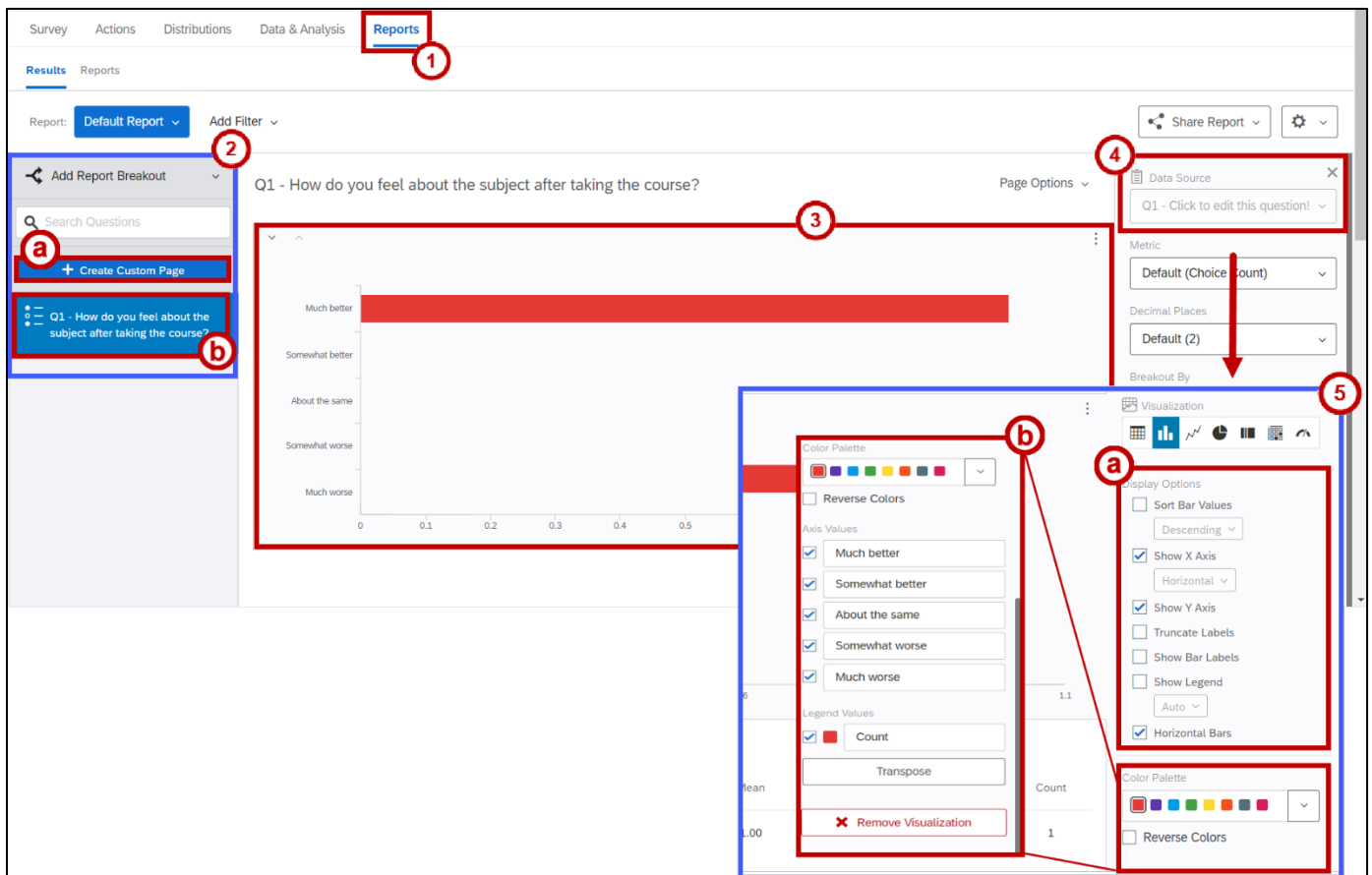


Figure 12 - Reports Module