

# Qualtrics: Getting Started Guide



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<p><b>Create or migrate to a LSU Qualtrics account</b></p>	<p><b>Create:</b></p> <ol style="list-style-type: none"> <li>1. Navigate to <a href="http://lsu.qualtrics.com">lsu.qualtrics.com</a></li> <li>2. Choose <b>I don't have a Qualtrics Account</b></li> <li>3. Login with your LSU credentials</li> </ol> <p><b>Migrate:</b></p> <ol style="list-style-type: none"> <li>1. Navigate to <a href="http://lsu.qualtrics.com">lsu.qualtrics.com</a></li> <li>2. Choose <b>I already have a Qualtrics account</b></li> <li>3. Enter your <b>previous</b> account information and choose <b>Migrate account.</b></li> </ol> <p><b>Note:</b> If you miss the prompt or would like to migrate your account after creating a new account, contact <b>Qualtrics Support</b> at <a href="mailto:support@qualtrics.com">support@qualtrics.com</a></p>
<p><b>Create a new survey</b></p>	<ol style="list-style-type: none"> <li>1. Click <b>+Create Project</b> at the top right.</li> <li>2. Name the survey and organize it into an appropriate folder.</li> <li>3. Click the green <b>Create Project</b> button.</li> </ol> <p><b>Note:</b> Surveys can be created from templates available in the Qualtrics Library. To select a pre-designed survey, after clicking create project, choose <b>From a Library</b> on the left, select the <b>Qualtrics Library</b>, and browse available projects.</p>
<p><b>Add and edit survey questions</b></p>	<ol style="list-style-type: none"> <li>1. Click <b>+Create a New Question</b> to add new questions to your survey. The <b>drop-down arrow</b> to the right shows an expanded menu of question types.</li> <li>2. <b>Click to write the question text</b> to edit the question. <b>Click to write Choice</b> to edit answer choices, if applicable to your question.</li> <li>3. Use the <b>question editing pane</b> on the right for more options specific to the selected question.</li> </ol>
<p><b>Customize survey settings</b></p>	<p>The following menus under the <b>Survey</b> page control general survey settings:</p> <ol style="list-style-type: none"> <li>1. <b>Look &amp; Feel</b> allows customization of fonts, colors, and buttons.</li> <li>2. <b>Survey Flow</b> controls the order of the questions if you are utilizing blocks or branching.</li> <li>3. <b>Survey Options</b> includes options for survey experience and protection.</li> <li>4. <b>Tools</b> has various options to help enhance efficiency in survey building.</li> </ol> <p><b>&gt;Preview Survey</b> will show what the survey will look like to your respondents.</p>
<p><b>Distribute a survey</b></p>	<p>The distribution module controls the distribution options. Surveys can be distributed via:</p> <ol style="list-style-type: none"> <li>1. <b>E-mail</b> anonymous or personalized links through Qualtrics or your personal e-mail system</li> <li>2. <b>Web</b> creates an anonymous survey link to embed on a website</li> <li>3. <b>Social</b> posts an anonymous link to six different social media platforms</li> <li>4. <b>Mobile</b> creates a QR code to scan with a mobile phone</li> </ol> <p>If at any time, you need to change your distribution method or redistribute your survey, choose <b>Distribute Survey</b> in the <b>Distribution Summary</b> of the <b>Distribution</b> module.</p>
<p><b>Analyze data</b></p>	<p>The <b>Data and Analysis</b> module offers various ways to sort, filter, and review the collected data.</p> <ul style="list-style-type: none"> <li>- View different columns of data on the web platform by choosing <b>Tools</b> then <b>Choose Columns.</b></li> <li>- Filter the responses by clicking <b>Add Filter</b> and choosing the metadata, field, or question to filter and selecting the <b>Operator</b> and <b>Operand.</b> Multiple Operands can be chosen at once.</li> <li>- View all of the responses from one respondent by clicking the <b>arrow</b> below <b>Actions</b> and <b>View Response.</b></li> <li>- Export the data to an Excel file by clicking <b>Export &amp; Import</b> and <b>Export.</b></li> </ul>



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<b>Build reports</b>	<p>The <b>Reports</b> module is a space to view and explore aggregate data. A default report is automatically created based on survey data. Personalized reports can also be created.</p> <ol style="list-style-type: none"><li>1. Click <b>Default Report</b> and <b>Create New Report</b>.</li><li>2. <b>Name</b> the report and click <b>Create</b>.</li><li>3. Change the default graph view by clicking on the present graph and using the right <b>editing pane</b> to select the desired <b>Visualization</b>.</li><li>4. Remove a question from the report by <b>unchecking the box</b> next to the question in the left <b>Question Page pane</b>.</li><li>5. Export the report by clicking <b>Export Report</b> and choosing the file format.</li></ol>
<b>Manage surveys</b>	<p>Surveys can be managed from the <b>Projects</b> landing page. Here, you can</p> <ul style="list-style-type: none"><li>- Close an active survey by opening the <b>Project Actions</b> menu under the drop-down arrow to the far right of the project line and click <b>Close Survey</b>.</li><li>- Re-open a closed survey by opening the <b>Project Actions</b> menu and click <b>Activate</b>.</li><li>- Delete a survey by opening the <b>Project Actions</b> menu and click <b>Delete Project</b>.</li><li>- Share a survey by opening the <b>Project Actions</b> menu and click <b>Share Project</b>.</li><li>- Create folders for organization by clicking <b>+New Folder</b> in the <b>folders pane</b>. Organize surveys by dragging and dropping projects into their respective folders.</li></ul>
<b>Support</b>	<p>Contact the FTC at 225-578-3375, option 1 or <a href="mailto:ftc@lsu.edu">ftc@lsu.edu</a></p> <p>View Qualtrics tutorials on the Qualtrics website: <a href="https://www.qualtrics.com/support/">https://www.qualtrics.com/support/</a></p> <p>Contact Qualtrics support directly at 1-800-340-9194 or <a href="mailto:support@qualtrics.com">support@qualtrics.com</a></p>

