Chapter 1

Create and Manage Surveys

The first steps for creating a survey are critical. This chapter explains how to create, copy and even collaborate on a survey.
AFTER READING THIS CHAPTER, YOU WILL KNOW HOW TO:

- Create your first survey
- Use the My Surveys tasks
- Organize surveys in folders
- Use the Collaborate feature to share surveys

If you have successfully logged in to your Qualtrics account, then you are ready to create a survey. There are several options for creating a new survey, and we will help you become familiar with them in this chapter. This is the first step you will need to take as you start the survey building process.

In addition to teaching about survey creation, this chapter will go over the tools available to you in the My Surveys tab when accessing and organizing your surveys. This includes the option to sort your surveys by header and add your surveys to folders.

Creating Your First Survey

When you log in to the Qualtrics Research Suite, you will arrive in the My Surveys tab. If you have not yet created any surveys, you will be prompted to create a survey. To proceed, select “Click here to create your first survey.” You will then be taken to the Create Survey tab. Alternatively, click directly on the Create Survey tab to see all of your survey creation options (Figure 1-1).

If you already have surveys in your account, you will see all of them listed in the My Surveys tab along with any surveys that have been shared with you and the task icons available associated with each survey.

![Figure 1-1 Click to create first survey.](image-url)
Once in the Create Survey tab, you will see that there are three main options for creating your survey: Quick Survey Builder, Create from Copy, and Survey Library. Each option, once selected, will take you into the Edit Survey tab where you can begin building and editing your survey.

The Quick Survey Builder is called “quick” because it allows you to build a survey instantly within the Qualtrics tool. When you select this option, your survey is brought in completely blank and you can add new questions manually.

If you would like to start with a pre-existing survey, select Create from Copy. This is a good option if you need to build a survey similar to another survey you have in your account and just need to make a few tweaks.

Finally, there is the Survey Library option. This option is similar to the Create from Copy option described above, but it lets you copy from your Survey Library, a Group Library, or the Qualtrics Survey Library. Qualtrics has a whole list of already built surveys in the Qualtrics library that can be used as templates when you are just starting out. Feel free to browse them and get ideas.
QUICK SURVEY BUILDER

Clicking this option will display the Create a New Survey window (Figure 1-3).

![Create a New Survey](image)

Figure 1-3 The Create a New Survey dialog after clicking the Quick Survey Builder button.

Since you are starting from scratch, you are asked for a survey name. You may choose to specify a folder. Once you click the **Create Survey** button, you are immediately taken to the **Edit Survey** tab so you can get to work.

CREATE FROM COPY

Clicking this option will display the Create from Copy window (Figure 1-4).

![Create from Copy](image)

Figure 1-4 The Create from Copy dialog window.

You are asked which survey you would like to copy, what you would like to name it, and which folder you want to put it in. You can also copy a survey by going to the **My Surveys** tab and clicking the **Copy** button next to the survey you want to copy. You will be given a similar window to specify the survey name and folder.
SURVEY LIBRARY

Clicking this option will display the Create from Survey Library window (Figure 1-5).

![Create from Survey Library](image)

*Figure 1-5 The Create from Survey Library dialog window.*

This allows you to copy a survey from your own survey library, or copy one from the group library of a group you belong to (including the Qualtrics survey library). Simply specify which library you want to pull the survey from and use the navigation to select the survey. From there you can name the survey and place it in a folder.

**Q - T I P**

Don’t forget the Qualtrics Library! It contains a variety of different surveys and questions that you are welcome to copy and use.

Navigating the My Surveys Tab

Once you have created surveys in your account, you will see the My Surveys tab as a homepage where you can see the list of all your surveys and access useful tools for each of them. These tools can be found under the Tasks column.

**TASK ICONS**

In Figure 1–6 you can see that there is a list of Tasks on the right-hand side of each survey listed. Use these icons for quick access to the main areas of the Qualtrics survey tool. Each task correlates to the survey it is next to on the table.
You can use the Task Icons (Figure 1-7) to jump directly to a specific task or location within the Research Suite. These icons provide one-click access to commonly used areas and features.

These task icons carry out the following actions:

**EDIT:** Jumps to the *Edit Survey* tab of the specific survey selected.

**RESULTS:** Jumps to the *View Results* tab of the specific survey selected.

**SEND:** Jumps to the *Distribute Survey* tab of the specific survey selected.

**VIEW:** Opens the preview URL of the survey for testing purposes. Functions the same as the *Preview Survey* link found on the *Edit Survey* and *Distribute Survey* tabs.

**COLLABORATE:** Enables you to give permissions to and share a survey with another Qualtrics user so they can view, edit, distribute, and analyze data in your survey. If there isn’t an existing user account for the person you want to collaborate with, then the tool will send an email and create a trial user account for them. You can read more about collaboration later on in the chapter.

**COPY:** Enables you to copy a survey, and even send a copy to another user account. When a copy is made, it becomes a completely separate survey with its own survey link. Survey data is not copied along with the survey.

**TRANSLATE:** Jumps to the Translate Survey feature in the *Edit Survey* tab.

**DELETE:** Displays a dialog box to confirm deletion, as all data is deleted with the survey. First, download a copy of your data and a copy of your survey. Use the Qualtrics Survey Format, or .qsf, for downloading your survey. A survey stored in .qsf format can be uploaded and reinstalled only into Qualtrics.
COLLABORATION

One of the most useful buttons available in the task menu is the **Collaborate** button. When clicked, it opens a window where you can choose to share your survey with another person or group.

Collaboration is a great way to get someone’s feedback on a survey before you distribute it. Collaborators can be given permission to make edits, distribute, and even view and analyze the results of shared surveys. Don’t worry, you control their access. They only have permission to perform the tasks that you specify.

To collaborate, first click the **Collaborate** task icon and enter the individual’s username or email address into the text box at the top (see Figure 1-8). All matches will be displayed as you type and you can select the correct one. You also have the option of clicking the **User and Group Address Book** link to the right. This gives you a list of users in your organization to select instead of typing in the username.

Once you’ve found your user, click the **Add** button. The user will then show up in the collaborate table and you will be able to specify what the user can access (Figure 1-9). In the Edit and View Results sections, you can allow all permissions by selecting the main checkbox, or be more specific by clicking the **Details** link.

**ALERT:** You can’t give permission for the user to do anything that your personal user account doesn’t give you permission to do.

When setting up the permissions you will see that there are five categories:

- **EDIT:** Allows collaborator to Edit survey.
- **VIEW RESULTS:** Allows collaborator to view survey results.
- **ACTIVATE/DEACTIVATE:** Allows collaborator to activate or deactivate the survey for you.
- **COPY:** Allows collaborator to make a copy of the survey to place and use in their own account.
- **DISTRIBUTE:** Allows collaborator to use the Distribute Survey options.
See Tables 1-1 and 1-2 for more details about the specific collaboration permission.

Most users will have the ability to share within their organization, but not all users will have the ability to share outside their organization. In fact, this is a feature mostly used in the academic world where research is shared between universities. The corporate world typically does not use this feature in an effort to keep sensitive research secure.

If you try to share a survey with someone who does not already have an account, you will be prompted to send an email to them that contains a link that, when clicked on, automatically creates a trial account for them. This allows them to collaborate with you through the trial account.

**Figure 1-10** Send an email for a trial account if the person you are sharing with does not have a user account (limited to academic accounts).

<table>
<thead>
<tr>
<th><strong>Table 1-1</strong>: Q-Reference: Edit Permission Details.</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EDIT SURVEYS</strong></td>
<td>Collaborator can use the <em>Edit Survey</em> tab and make changes to your survey.</td>
</tr>
<tr>
<td><strong>SET SURVEY OPTIONS</strong></td>
<td>Allows collaborator to use the <em>Survey Options</em> button on the <em>Edit Survey</em> tab.</td>
</tr>
<tr>
<td><strong>DELETE SURVEY QUESTIONS</strong></td>
<td>Just like it sounds, you can specify if you want to allow your collaborator to delete questions.</td>
</tr>
<tr>
<td><strong>USE SKIP LOGIC</strong></td>
<td>Specify whether or not the person can set skip logic within the survey.</td>
</tr>
<tr>
<td><strong>USE QUOTAS</strong></td>
<td>Choose whether or not the person can set quotas on the survey.</td>
</tr>
<tr>
<td><strong>TRANSLATE SURVEYS</strong></td>
<td>Decide whether you want to allow the person to view, add, and edit translations for the survey.</td>
</tr>
<tr>
<td>CREATE RESPONSE SETS</td>
<td>Pick whether or not you allow the option to create Response Sets in the Survey Options window.</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>EDIT SURVEY FLOW</td>
<td>Control whether the collaborator can work with branch logic, end of survey elements, randomizers, and other elements within the Survey Flow.</td>
</tr>
<tr>
<td>USE CONJOINT</td>
<td>Give permission to access the self-explicated conjoint tool under Advanced Options on the Edit Survey tab.</td>
</tr>
<tr>
<td>COPY SURVEY QUESTIONS</td>
<td>Give the ability to copy questions in the survey using the Copy Question button in the blue column to the right of each question.</td>
</tr>
<tr>
<td>EDIT SURVEY QUESTIONS</td>
<td>Provide the ability to edit or remove the questions already in the survey, as well as add new questions.</td>
</tr>
<tr>
<td>USE BLOCKS</td>
<td>Give the ability to create new question blocks within the Edit Survey tab.</td>
</tr>
<tr>
<td>USE TRIGGERS</td>
<td>Give the ability to use Email and Panel Triggers, under Advanced Options on the Edit Survey tab.</td>
</tr>
</tbody>
</table>

*If you don’t give access to the Edit Surveys permission, all other permissions are inaccessible.

**Table 1-2: Q-Reference: View Results Permissions Details.**

<table>
<thead>
<tr>
<th>EDIT SURVEY RESULTS</th>
<th>Allow the collaborator to access data and be able to delete or import data on the Responses page on the View Results tab.</th>
</tr>
</thead>
<tbody>
<tr>
<td>USE CROSS TABS</td>
<td>Decide whether the collaborator can build and work with Cross Tabulations on the View Results tab.</td>
</tr>
<tr>
<td>USE SUBGROUP ANALYSIS</td>
<td>Allows the collaborator to set up subgroups within reports.</td>
</tr>
<tr>
<td>VIEW SURVEY RESULTS*</td>
<td>Allows the collaborator to access the View Results tab. If unchecked, the collaborator cannot access the View Results tab.</td>
</tr>
<tr>
<td>VIEW RESPONSE ID</td>
<td>Decide whether the collaborator can view the Response ID column on the Responses page and in the files downloaded from the Download Data page.</td>
</tr>
</tbody>
</table>

*If you don’t give access to the View Survey Results permission, all other permissions are inaccessible.
Show More Data

In the right-hand corner of the My Surveys tab is the Show More Data drop-down button (see Figure 1-15). This option allows you to display or not display certain columns in the survey table. Creation Date and Modified Date are not displayed by default, but you can choose to display them.

Task Icons option in the drop-down menu allows you to select the Task icons to display in the Tasks column. Each Task icon, except for Survey Copy and Survey Delete, is accessible in other places in the Survey Research Suite. Changed settings will be remembered the next time you log in.

![Figure 1-11 Specify what should be displayed.](image1)

In the gray navigation bar at the top of the My Surveys tab (Figure 1-12), you have more icons that will take you to other tabs within the tool, like Create Survey, Distribute Survey, and View Results. These icons can help you quickly navigate the tool.

![Figure 1-12 Jump to a corresponding tab from the My Surveys tab by clicking an icon in the navigation bar.](image2)
As you create more and more surveys, it may get difficult for you to find the survey you need. You’re in luck! Within the My Surveys tab there are several tools for organizing your surveys. Become familiar with these tools so you will have a clean account that is easy to navigate.

**SORT BY HEADING**

Each column header across the top of the survey table can be clicked. When the header is clicked, the corresponding column is sorted alphabetically, by number of responses, by date created or by date modified.

You can also star a survey (similar to flagging an email), and sort for the starred or un-starred surveys. Sorting by starred surveys will bring all of the starred surveys to the top of the list. The same goes for the active and inactive surveys. If you sort by Creation Date and Modified Date, the most recently dated surveys are brought to the top.

**FOLDERS**

If you are a folder lover, you can create folders to group your surveys. At the top of the survey table is a Manage Folders link that expands to a folders view (see Figure 1-14).

To Manage Folders, you can do the following:

1. Click Add Folder to create a new folder, and Delete Folder to remove a selected folder.
2. Drag and drop any of your surveys on a folder to place them into that folder.
3. When you are finished making changes, click Close.
Figure 1-14  The folder management view.

Once you have organized your surveys into folders, you can close the folder manager and go back to the survey table. Select which folder of surveys you want to look at by clicking on the drop-down menu to the left of the Manage Folders link.

**Q-TIP**

You may assign a survey to a folder when creating it. The Edit Survey tab also allows you to add a survey to a folder or change which folder it is in. To do this, click on the survey name at the top of your survey while in the Edit Survey tab.

**SEARCH**

The search bar is convenient when you would like to find a survey fast. It is located near the top right of the page and allows you to search for a survey in your list of surveys by typing in the name. Your survey list will filter with matches according to what you type.

**Q-TIP**

Qualtrics searches within the folder you currently have selected.

**RENAME SURVEYS**

If you have created a survey but would like to change the name, you can do so in the Edit Survey tab. When you click on the survey in the My Surveys tab, you will be taken to the Edit Survey tab. The survey name will show at the top of the survey. To change it, click directly on the survey name and start typing in the new name. You can change the name, as well as the folder it is in.
Research Suite Helps

As you navigate through the Research Suite, you will notice that there are many powerful tools accessible to you across every page. Feel free to use these tools as you work through your research process.

The Current Survey Drop-Down Menu is a convenient feature found on every page of the Suite. You can be working in one survey on the Edit Survey page and quickly change to another survey using the drop-down menu. When you go to the Library and Panels tabs, this drop-down changes to show the current library you are in or the current panel library.

The Get Help button is also available on each page. This button directs you to the Qualtrics University where you can find the following helpful tools:

- Online trainings
- Qualtrics University online documentation: www.qualtrics.com/university
- Contact information for Qualtrics: 800–340–9194, support@qualtrics.com

Please note that many of the features within the tool are permission based. While all permissions will be described here, you may not have access to a particular feature. If access is missing, please communicate with your in-house Qualtrics Administrator or contact your Qualtrics Account Manager to gain more access.