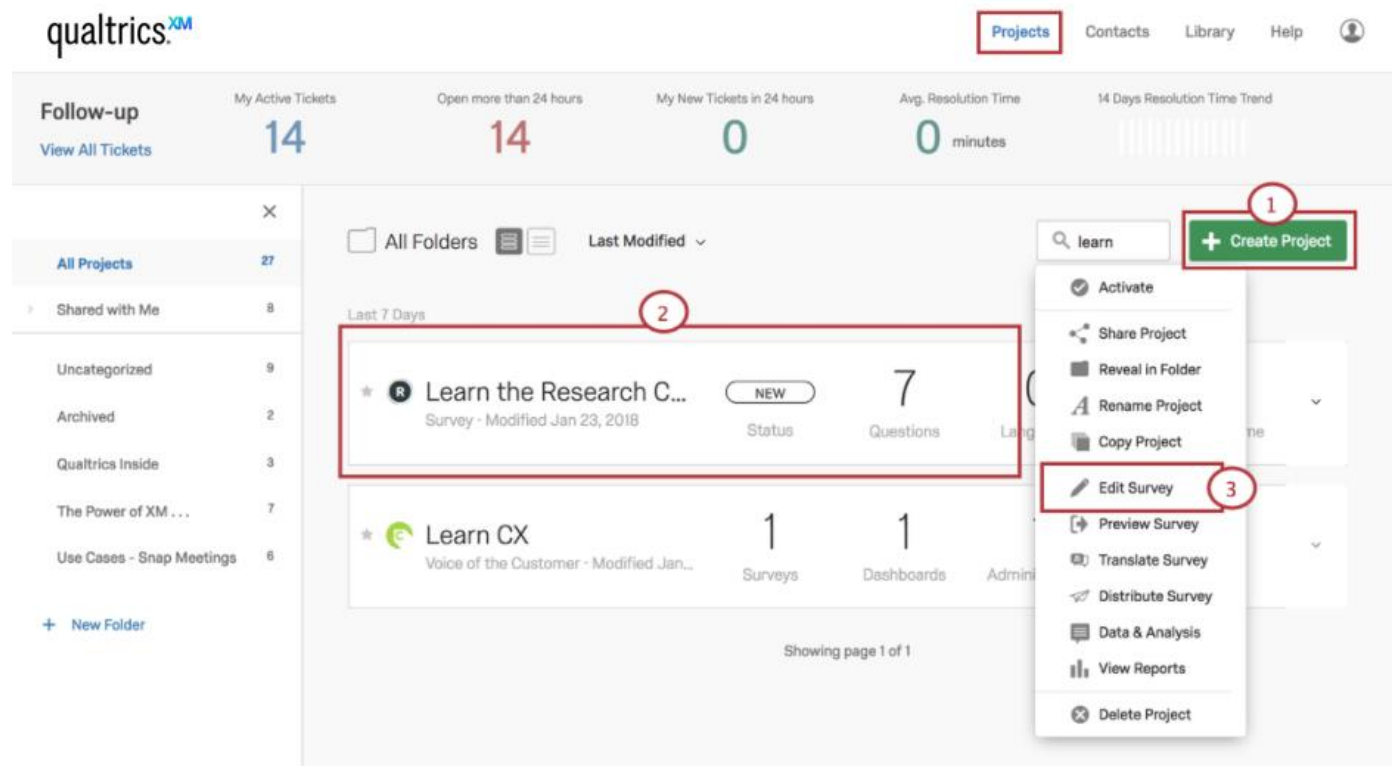


# Step 1 Creating a project

Surveys are created and edited in the survey editor.

From the Projects page, open the Survey tab in any one of three ways:



1. Choose **Create Project**.
2. Click on any existing project in your **Projects List**.
3. Pick **Edit Survey** from the actions dropdown menu.

As the Survey tab opens, you'll see the survey editor's most prominent features:

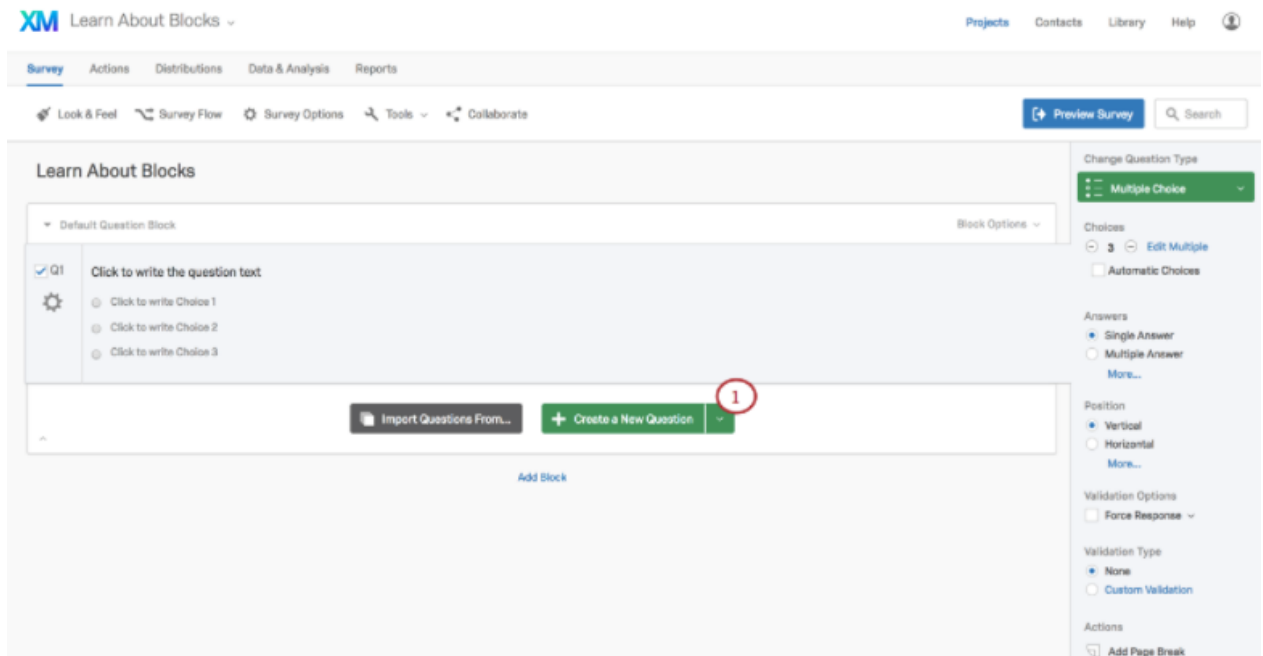
The screenshot shows the XM Survey Editor interface. At the top, there is a navigation bar with 'Survey' selected, and sub-menus for 'Actions', 'Distributions', 'Data & Analysis', and 'Reports'. Below this is a toolbar with icons for 'Look & Feel', 'Survey Flow', 'Survey Options', 'Tools', and 'Collaborate', along with a 'Preview Survey' button and a search box. The main workspace is titled 'Learn the Survey Editor' and contains a 'Default Question Block' with a question text area and three choice options. A right-hand sidebar provides configuration options for the question type (Multiple Choice), number of choices (3), and answer type (Single Answer). Red circles and arrows highlight specific areas: 1 points to the question block header, 2 points to the question text area, 3 points to the 'Edit Multiple' button in the sidebar, and 4 points to the top navigation bar.

1. Question block
2. Question editing area
3. Question editing pane
4. Survey toolbar

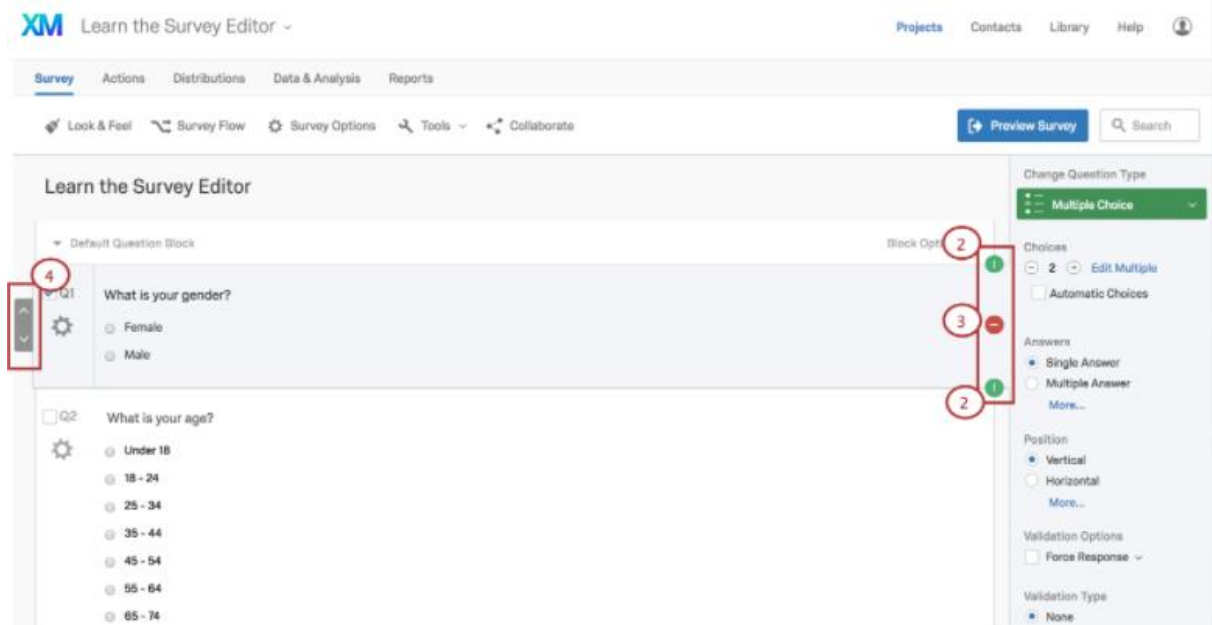
## Step 2 Survey questions

Initially, a default multiple-choice question will be inserted into your Default Question Block. This ensures that your block has at least one question to start with.

1. To add additional questions to a block, click **Create a New Question**.



2. To add more questions, hover over any existing question and click the green plus (+) buttons (either above or below the existing question).



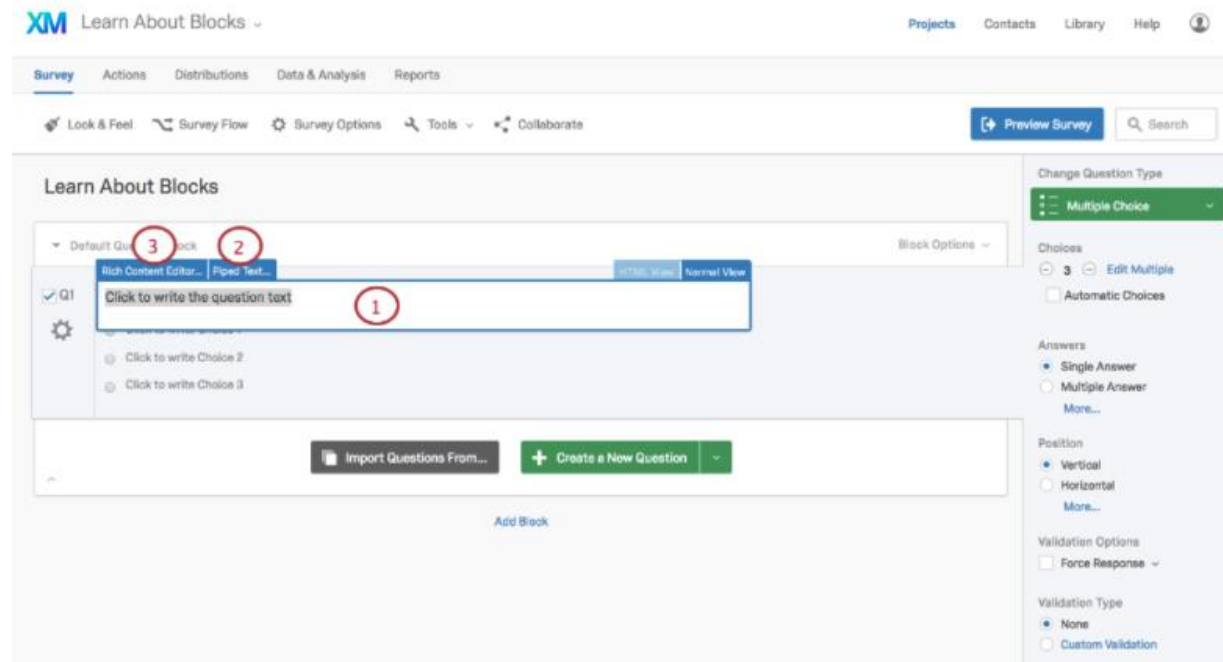
3. Click the red minus (-) sign to delete a question.

**Qtip:** You can recover deleted questions from the Trash at the bottom of the survey. See the [Deleting Questions](#) section for more details.

4. Move questions up or down in the survey with the question reorder controls to the left of the question editing area.

## Editing Question Text

You'll write questions, edit question text, and apply text formatting in the question editing area.



1. Click in the question text (or answer choice) text boxes to enter or edit your text.
2. Click the [Piped Text](#) button to grab information from previous questions and blocks (e.g., pulling in someone's name from a Demographics Block to personalize a question).
3. Click the [Rich Content Editor](#) button to format your text by changing fonts, font sizes, applying bolds, bullets, italics, and more.

## Change Question Types

When you first click **Create Project**, a multiple choice question is inserted into your first question block by default. However, you might want to change it to another type or style of question. Use the question editing pane to choose among more than a dozen [question types](#) (e.g., Multiple Choice, Rank Order, Heat Map, NPS, Graphic Slider, among many others).

**Qtip:** Clicking on any question will open its unique question editing pane.

To change question types:

1. Open the editing pane by clicking on a question.

- Click the dropdown menu under Change Question Type.

XM Demographics Reference Survey

How would you rate your experience with Customer Support?

Very Satisfied Somewhat Satisfied Neutral Somewhat Dissatisfied Very Dissatisfied

Quality of service

Helpfulness of representatives

Promptness of response

Demographics

Q34 What is your age?

Q35 How many individuals live in your household?

Static Content

- Descriptive Text
- Graphic

Standard Questions

- Multiple Choice
- Matrix Table
- Text Entry
- Slider
- Rank Order
- Side by Side

Specialty Questions

- Constant Sum
- Pick, Group, and Rank
- Hot Spot
- Heat Map
- Graphic Slider

- Pick a new question type from the list.
- Observe that the editing pane displays samples of each question type as you scroll over them.

Once you have finished building your survey, you can preview it to ensure that everything is working the way you want by clicking **Preview** in the top-right of the Survey tab.

Reports

Tools ▾

Preview

Publish

iQ Score: Great

Published

Block Options ▾

Change Q

• — Mult

Choices

− 3 +

Auto

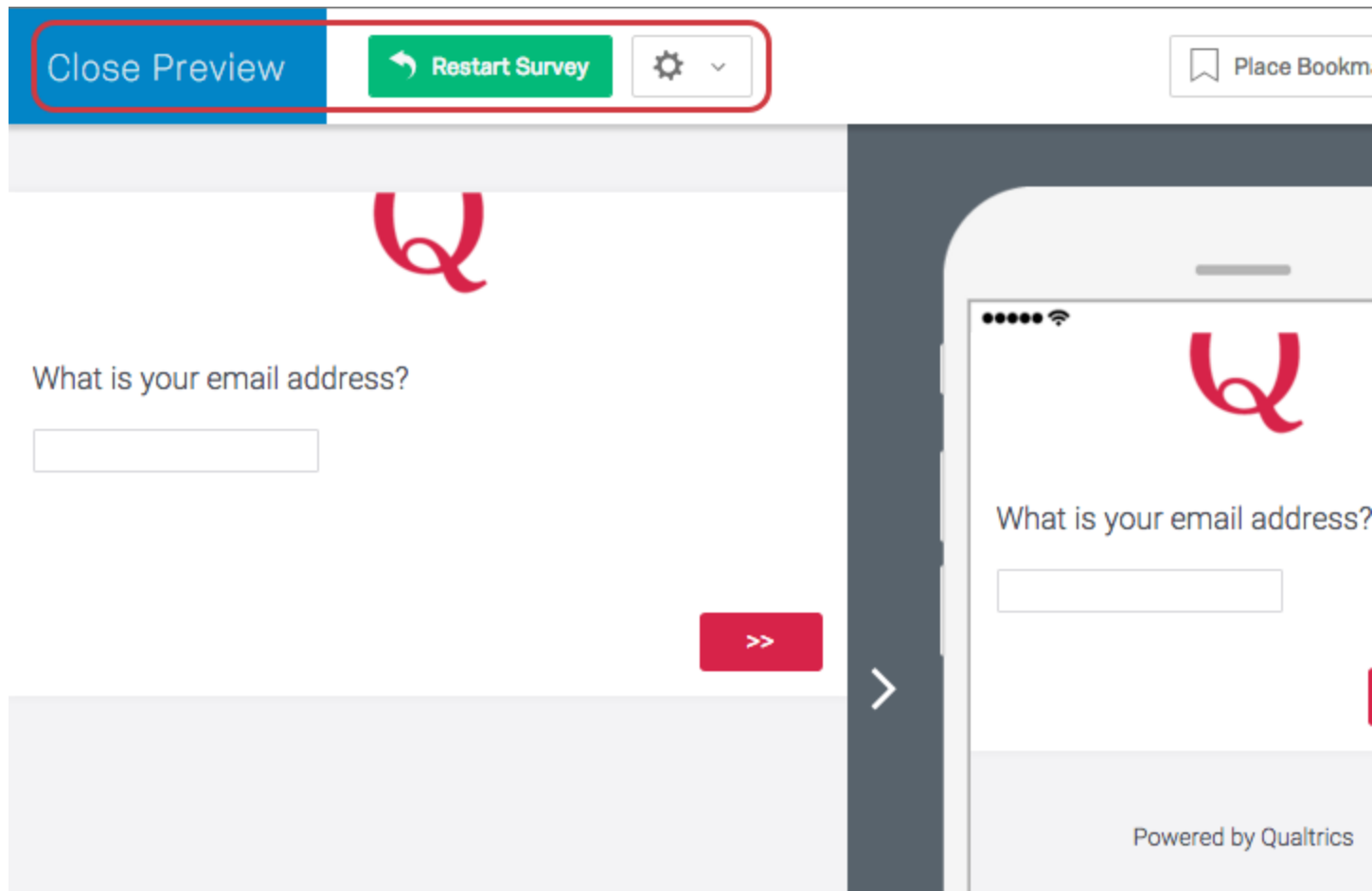
Answers

Single

Multip

More

In the preview survey mode, you can answer questions and move through the survey the same way your respondents would with a real link. Though the survey itself looks exactly the same as in the real link.



**Qtip:** If you would like another individual to preview the survey, you can copy the URL in the web address when you are previewing your survey and send that URL to whomever you want to test your survey. Note that your associate doesn't need to have a Qualtrics account to view the preview link and test out the survey.

## Step 3 the Distribution

Select the **Distributions** tab to:

- Activate a new survey
- Start [collecting responses](#)
- Monitor your response collection metrics

Survey

Actions

**Distributions**

Data &amp; Analysis

Reports

 Pause Response Collection

Distribution Summary



Anonymous Link



Emails



Personal Links

Recent Responses

3

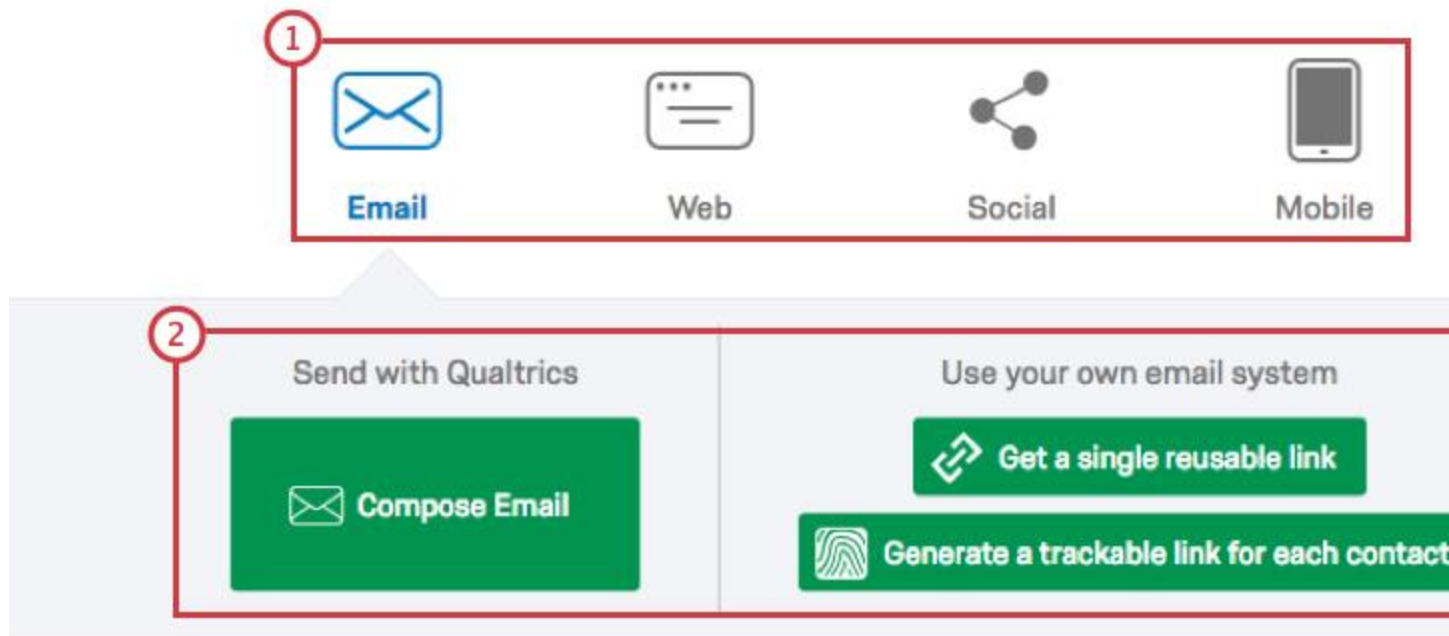
**Qtip:** If you do not have the Distributions tab available to you and the survey has been shared with you, contact the survey owner to request that they give you permission to distribute the survey. If you own the survey and don't have the tab available, contact your [Brand Administrator](#) so they can enable the permission on your account.

Channels & Methods

As the Distributions tab first opens, you'll need to pick a distribution channel and a method within that channel to start collecting survey responses.



# How do you want to distribute your survey



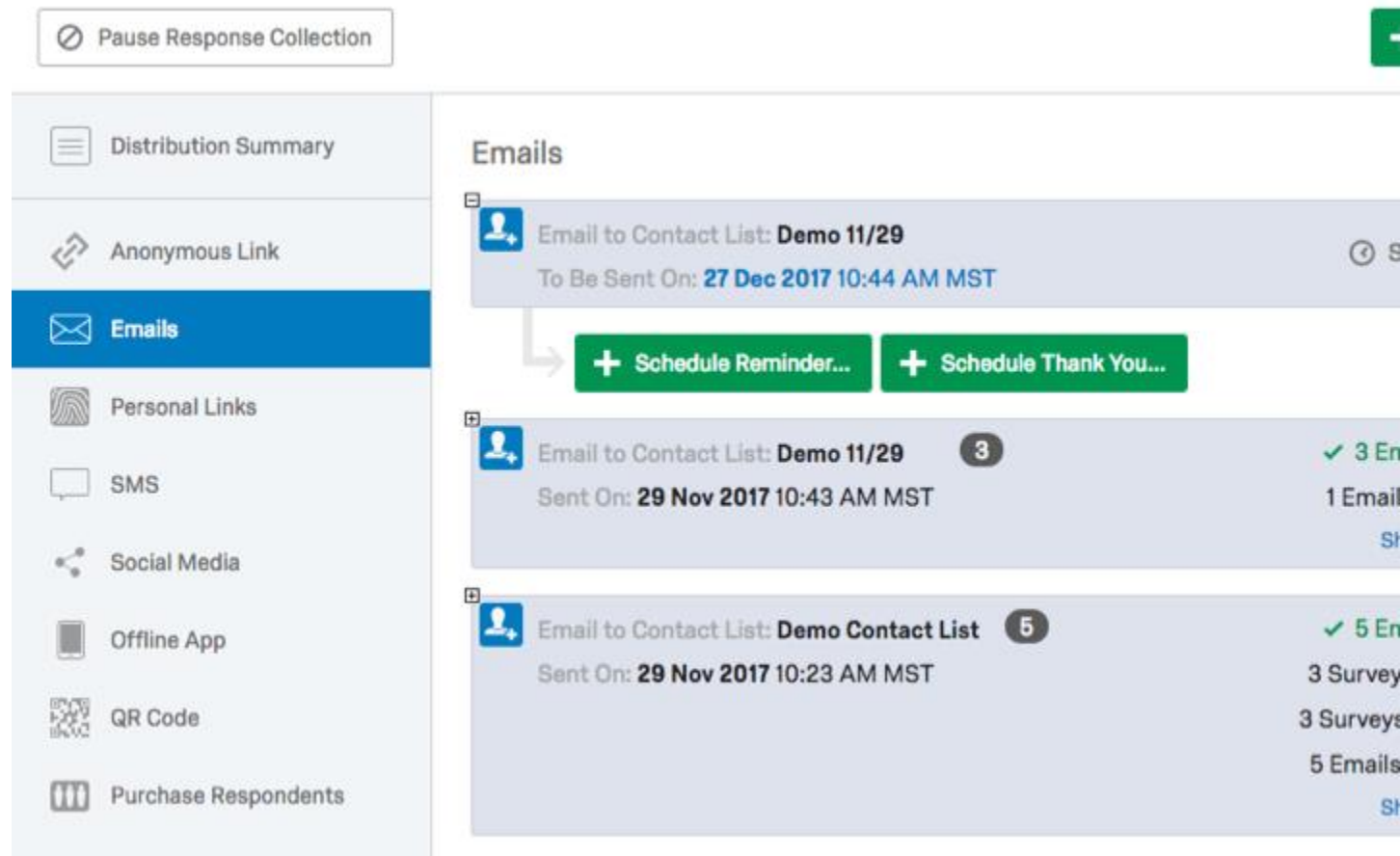
1. **Channels:** Choose from **Email**, **Web**, **Social**, or **Mobile**.
2. **Methods:** Pick from the available invitation options (e.g., email invites can be sent via the Qualtrics mailer or through your own email system). The options available here will change depending on the channel you have selected.

**Qtip:** You can use several distribution methods for the same project.

Visit the [Collecting Responses](#) page for step-by-step instructions on how to distribute your survey and to start gathering responses.

## About Email Distributions

[Email distribution](#) uses either the Qualtrics mailer or your own email system to send custom survey invitations.



If you choose the Qualtrics mailer method, unique [individual links](#) are sent to the members on your [contact list](#). Individual links record identifying respondent information that you can use in future reports or as [Embedded Data](#).

**Qtip:** Click here to learn how to create a [Contact List](#).










Emailing Anonymous vs. Personal Links

Researchers who use their own mail systems will generally use reusable [Anonymous Links](#), which do not record identifying respondent information. (Essentially, everyone gets the same link.)

However, if you use a third-party mail system, but still need to track the responses belonging to specific recipients, you can generate [Personal Links](#). The links are downloaded to your computer in a CSV file which can then be merged into your contact list.

**Qtip:** The data stored in a CSV (comma-separated values) file can be uploaded to a relational database or spreadsheet application like Microsoft Excel or Google Sheets. CSV is a common format used to transfer large amounts of data between applications.

 Pause Response Collection

-  Distribution Summary
-  Anonymous Link
-  Emails
-  **Personal Links**
-  SMS
-  Social Media
-  Offline App
-  QR Code
-  Purchase Respondents

### Personal Links

Contacts	Created Date	Link Expiration	Links	Su St
New Customer	12 Aug 2015 2:54 PM	11 Oct 2015 2:54 PM	<b>1</b>	
Customer Contact List	12 Aug 2015 2:53 PM	11 Oct 2015 2:53 PM	<b>5</b>	

Showing 1-2 of 2

### Email Management

Qualtrics provides detailed metrics of your email distributions, keeping track of emails sent, failed, finished, and bounced. Learn more in the [Email Distribution Management](#) page.

Email to Contact List : **Retail Customers - July** 9  
Sent On : **8 Jul 2015 10:43 AM**

+ Schedule Reminder + Schedule Thank You Message

View  
Delete  
Download History

Showing 1-1 of 1

Email distributions also let you schedule and manage reminders and thank you messages, as explained on the [Reminder & Thank You Emails](#) support page.

Email to Contact List : **Retail Customers - August**  
To Be Sent On: **8 Jul 2015 12:08 PM**

+ Schedule Reminder + Schedule Thank You Message

## Anonymous Links

Copy and paste [Anonymous Links](#) to email messages, social media sites, websites, or in-page pop-ups.

Pause Response Collection

Distribution Summary

Anonymous Link

Emails

Personal Links

SMS

Social Media

Offline App

QR Code

Anonymous Survey Link

A reusable link that can be pasted into emails or onto a website, and is unable to track identifying information of respondents.

[https://survey.co1.qualtrics.com/jfe/form/SV\\_3KU3EbKVxMW...](https://survey.co1.qualtrics.com/jfe/form/SV_3KU3EbKVxMW...)

Customize Link

Anonymous Links are easy to deploy, but they come with pros and cons:

- They collect responses with no identifying information.
- There is no limit to how many times a respondent can use the Anonymous Link.
  - To prevent multiple responses from the same person (a.k.a., Preventing Ballot-Box Stuffing) consult the [Survey Protection](#) page.
- Survey progress is saved so respondents can close their window and return to the same computer and finish later. (See the [Save and Continue](#) support page.)
- You can disable the Anonymous Link option by enabling **By Invitation Only** in the [Survey Options](#). This is useful if you would like to convert your distribution method to [Individual Links](#) only.

## Step 4 Data & Analysis

The Data & Analysis tab lets you filter, classify, merge, clean, and statistically analyze your response data:

1. Click **Data & Analysis** to reveal up to six key sections.



2. Select between the sections as introduced below:
  - Data
  - Text
  - Stats iQ
  - Predict iQ
  - Crosstabs
  - Weighting

**Qtip:** Some of these tabs, like [Predict iQ](#) and [Stats iQ](#) are add on features. If you'd like to purchase access to them, contact your Qualtrics [Account Executive](#).

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Was this helpful?

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## Data Section

Most filtering, classifying, merging, importing, and data cleaning activities take place under the Data section. For example:

1. Display and review results in the responses window by toggling between your:

XM Statistical Analysis Projects Contacts Library Survey D

Survey Actions Distributions **Data & Analysis** Reports

**Data** Text Stats iQ Predict iQ Crosstabs Weighting

Add Filter 2 Response Quality 100% 1a 1b

With Selected < **Page 1 of 266** > Export & Import

<input type="checkbox"/>	Recorded Date	Q1 - What is your gender?	Q3 - How satisfied are you with today's visit?	Q5 - Are you a returning customer?	Q6 - Do y any chil
<input type="checkbox"/>	Jan 9, 2020 5:20 PM	Female	Extremely dissatisfied	Yes	No
<input type="checkbox"/>	Jan 9, 2020 5:20 PM	Male	Somewhat dissatisfied	No	Yes

- a. “Completed” or [Recorded Responses](#)
  - b. “Incomplete” or [Responses in Progress](#)
2. [Filter](#) by specific questions or by your Saved Filters, Survey Metadata, Contact Fields, or Embedded Data fields.

3. Use operators to drive your filters.

The screenshot shows the XM Statistical Analysis interface. At the top, there are navigation links for 'Projects', 'Contacts', 'Library', and 'Surveys'. Below this is a main navigation bar with 'Survey', 'Actions', 'Distributions', 'Data & Analysis' (highlighted), and 'Reports'. Under 'Data & Analysis', there are sub-links for 'Data', 'Text', 'Stats IQ', 'Predict IQ', 'Crosstabs', and 'Weighting'. The 'Data' sub-link is active. A filter bar is visible, containing a 'Manage Filters...' button, a dropdown menu for 'Q4\_NPS\_GROUP - On a scale of 0-10, ...', a dropdown for 'Is', and a dropdown for '2 - Passive'. A red box labeled '3' highlights the filter bar. To the right of the filter bar, it says 'Filtered Responses: 954'. Below the filter bar, there is a 'Response Quality 100%' indicator. A table of data is shown below, with a red box labeled '4' highlighting the 'Page 1 of 48' navigation. To the right of the table, there is an 'Export & Import' dropdown menu with options: 'Export Data...', 'Import Data...', and 'Manage Previous Downloads...'. The table has columns for 'Recorded Date', 'Q1 - What is your gender?', 'Q3 - How satisfied are you with today's visit?', and 'Yes/No'.

	Recorded Date	Q1 - What is your gender?	Q3 - How satisfied are you with today's visit?	Yes/No
<input type="checkbox"/>	Jan 9, 2020 5:20 PM	Non-binary	Extremely dissatisfied	
<input type="checkbox"/>	Jan 9, 2020 5:20 PM	Male	Somewhat satisfied	Yes

**Qtip:** See the [Filtering Responses](#) page for more details.

4. Navigate page-by-page through your responses.
5. Click the **Export & Import** dropdown menu to [import responses](#), [combine responses](#) from multiple surveys, manage your previous downloads, or [export](#) your data in [various formats](#).



6. Click the **Edit** button to enter edit mode; you can add answers to individual responses or make essential edits, such as removing foul language.

The screenshot shows a survey data analysis interface. At the top, there are navigation tabs: Survey, Actions, Distributions, **Data & Analysis**, and Reports. Below these are sub-tabs: **Data**, Text, Stats iQ, Predict iQ, Crosstabs, and Weighting. A 'Response Quality' indicator shows 100%. The main area displays a table of responses with columns for 'Recorded Date', 'Q1 - What is your gender?', 'Q3 - How satisfied are you with today's visit?', 'Q5 - Are you a returning customer?', and 'Q6 - D any'. Each cell in the table contains a dropdown menu for editing. A red box highlights the 'Tools' dropdown menu in the top right corner, and red arrows point from it to the dropdown menus in the table cells.

<input type="checkbox"/>	Recorded Date	Q1 - What is your gender?	Q3 - How satisfied are you with today's visit?	Q5 - Are you a returning customer?	Q6 - D any
<input type="checkbox"/>	Jan 9, 2020 5:20 PM	Female ▾	Extremely dissatisfied ▾	Yes ▾	
<input type="checkbox"/>	Jan 9, 2020 5:20 PM	Male ▾	Somewhat dissatisfied ▾	No ▾	
<input type="checkbox"/>	Jan 9, 2020 5:20 PM	Female ▾	Extremely satisfied ▾	Yes ▾	
<input type="checkbox"/>	Jan 9, 2020	Male ▾	Extremely dissatisfied ▾	No ▾	

**Qtip:** See the [Response Editing](#) page for more details.

7. [Delete](#) responses, save column [layouts](#), or [translate responses](#) under the Tools dropdown menu.
8. Click any column header to move, hide, rename, or sort columns (e.g., Largest-Smallest). You can also view responses as numeric values (also known as [recode values](#)) in a

column.

Add Filter ▾

Response Quality 100%

With Selected ▾

Page 1 of 266

Export & Import

<input type="checkbox"/>	Recorded Date	Q1 - What is your gender?	Q3 - How satisfied are you with today's visit?	Q5 - Are you a returning customer?	Q6 - Do you have any c...
<input type="checkbox"/>	Jan 9, 2020 5:20 PM		Extremely dissatisfied	Yes	
<input type="checkbox"/>	Jan 9, 2020 5:20 PM		Somewhat dissatisfied	No	
<input type="checkbox"/>	Jan 9, 2020 5:20 PM		Extremely satisfied	Yes	
<input type="checkbox"/>	Jan 9, 2020 5:20 PM		Extremely dissatisfied	No	
<input type="checkbox"/>	Jan 9, 2020 5:20 PM	Non-binary	Extremely dissatisfied	No	

8

- Edit Column Title...
- Sort Smallest-Largest
- Sort Largest-Smallest
- Hide Column
- View as Numeric Values
- Move Column Left
- Move Column Right

**Qtip:** See the [Recorded Responses](#) page for more details.