**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:
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.
2. Click the dropdown menu under Change Question Type.

3. Pick a new question type from the list.
4. 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.
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
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.
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.
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 distributions also let you schedule and manage reminders and thank you messages, as explained on the Reminder & Thank You Emails support page.

Anonymous Links

Copy and paste Anonymous Links to email messages, social media sites, websites, or in-page pop-ups.
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**.

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:
   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.

![Filtering Responses](image)

Qtip: See the Filtering Responses page for more details.


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.

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
<table>
<thead>
<tr>
<th>Recorded Date</th>
<th>Q1 - What is your gender?</th>
<th>Q3 - How satisfied are you with today's visit?</th>
<th>Q5 - Are you a returning customer?</th>
<th>Q6 - Do you have any comments?</th>
<th>Q7 - Would you recommend us to others?</th>
</tr>
</thead>
</table>
| Jan 9, 2020 5:20 PM | Non-binary | Extremely dissatisfied | Yes | No | |"