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**

1. Click the **Create Project** button.

2. The **Create a Project – Research Core** pop-up window appears. Select **Blank Survey Project** or **Create From Existing** (in this example, we will click **Blank Survey Project**) (See Figure 2).
3. Type a **Project Name** (See Figure 3).
4. Click **Create Project** (See Figure 3).
The Survey Module Interface

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

1. **Survey Module Tab** - area for you to build and edit your survey (See Figure 4).
2. **Question Text & Answers** - click on the placeholder text to edit (See Figure 4).
3. **Create a New Question Drop-Down** - allows you to add more questions to your survey (See Figure 4).
4. **Green Plus Signs** - allows you to add questions before or after the current question (See Figure 4).
5. **Red Minus Sign** - click this to delete the current question (See Figure 4).
6. **Question Editing Pane** - contains options and settings for selected question (See Figure 4).
7. **Preview** - click this button to preview your survey (See Figure 4).

Figure 4 - 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. Click the **Distributions Tab** to access the *Distributions Module* (See Figure 5).
2. The first time you enter the *Distributions Module*, you will be prompted to select your **distribution method**: Email, Web, Social, Mobile or Purchase (See Figure 5).
3. Once you select your method, you will see the **options tab** for that method. For this example, we will choose *Email* (See Figure 5).
4. From the *Email* options, we will select **Get a single reusable link** (See Figure 5), which will create a non-traceable anonymous link.

![Figure 5 - Distributions Module](image-url)
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 6).

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

![Figure 6 - Anonymous Link and Emails](https://kennesaw.col.qualtrics.com/jfe/form/SV_9T7TjyNa8vplV25)
Data & Analysis

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

1. Click the **Data & Analysis** tab (See Figure 7).
2. The **Data & Analysis** module opens. You will be able to see the following:
   a. **Response Status** - indicates the number of recorded responses or responses in progress (See Figure 7).
   b. **Export/Import** - allows you to export as CSV or XML, or import your responses for outside analysis (See Figure 7).
   c. **Response(s)** - area where all of your recorded survey responses reside (See Figure 7).
   d. **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 7).

![Figure 7 - Data & Analysis Module](image)
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 8).
2. The Page list is located on the left. It contains the following (See Figure 8):
   a. Create Custom Page - allows you to create custom pages to suit your needs, by further exploring or arranging your survey results (See Figure 8).
   b. Question Pages - default pages made for each one of your questions. Each page has interactive charts, called visualizations (See Figure 8).

3. Question & Answer – Click on the question/answer box to access more 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 8).
   b. Color Palette – choose from several color options for your visualization.
4. Data Source - choose this drop-down when you want the visualization to show a different question (See Figure 8).

Figure 8 - Reports Module