Getting Started: Qualtrics for New Lewis-Clark State Users

Get Started	Instructions
Survey Policy	- First, carefully read through the [Survey Policy](#). - The use of Qualtrics should adhere to the [Survey Policy](#).
Register	- If you have not done so already, register online [here](#).
Login to Qualtrics	- After registration, log in here: [Staff/Faculty Sign In](#) or [Student Sign In](#). - Staff and faculty should use their Lewis-Clark State log in information. - Students currently need to email Mercedes Pearson, mdpearson@lcsc.edu, for their username and password.
Projects Page	As you login to Qualtrics, you will arrive on the [Projects page](#). The Projects page lets you scroll through your projects, create new ones, and view your survey related data.
Create a New Project	- To create a project, click the **Create new project** button at the top right. Create new project - Choose either CoreXM (Survey Platform) or your desired [XM category](#). - You can create a simple project from scratch by selecting **Create your own** in the dropdown menu (default) and clicking the **Survey** button. Survey - Name your project something clear and descriptive. - Click **Get Started.** - It is important to note that changes to your project will automatically be saved. CTRL+Z will undo changes. - Click [here](#) for more information on creating projects.
Add and Modify Questions	- After clicking **Get Started**, you will be taken to the [Survey tab](#) where you can begin adding questions to your survey. - To do so, click **+Create a New Question** button toward the bottom of the page. + Create a New Question - Multiple Choice is the default question type, but you can change this using the arrow next to the **+Create a New Question** button, or by selecting the button in the question editing pane on the right, under **Change Question Type** at the top. - Use the question editing pane on the right to adjust the question. There are different options for each unique question type. - Move questions up or down in the survey with the question reorder controls to the left of the question editing area. - Click on the text of your question, then click the [Rich Content Editor](#) button to format your text by changing fonts, font sizes, applying bolds, bullets, italics, and more. - Click [here](#) to learn more about creating question and [here](#) to learn more about formatting questions.

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Conditional Options (Advanced)	- If you want to show different follow-up questions based on respondents' answers, explore **Add Display Logic** in the question editing pane. For example, if you would like to ask first-year students certain follow-up questions and transfer students separate follow-up questions, you would click Add Display Logic and select the question in which you asked what type of student they were (first-year or transfer). Click here to learn more about display logic.
Preview Your Project	- To view your project as if you were your respondents, click the blue **Preview** button. [→ Preview] - This preview provides both computer screen and mobile device preview options. - It is highly recommended that you preview your project frequently, as you are modifying questions and adding pages. - To change the colors, font size, and design features of your project, explore the **Look & Feel** tab. Once you click into the Look and Feel tab, you will find the LCSC Default theme. - If you are adding a form to the Lewis-Clark State website, it is required that you use the LCSC Default Theme.
Activate and Distribute Your Project	- When your project is ready to be published and sent, click on the **Distributions** tab at the top left. - As you will see, there are many options. The simplest way to distribute your project is create an anonymous link that can be copied and pasted into emails and webpages. Click here to learn more about anonymous links and click here to learn more about other distribution methods.
View and Download your Results	- To quickly view individual responses, click the **Data & Analysis** tab. The default tab is Data, which is you where you can view the latest individual responses. - To download the data to Excel or SPSS, click **Data & Analysis -> Data -> Export & Import -> Export Data**. Then choose your file format (CSV opens in Excel). Click Download.
Close, Reactivate, Share, or Delete Your Project	- Most management features can be found on the **Projects** page by clicking on the options menu on the far right of a project. ... - To close an active project, click **Close** in the options menu. This does not delete the project, it only stops collecting new responses. - To activate or re-activate a closed project, click **Activate** in the options menu. - To share a project with another Qualtrics user, click **Collaborate** in the options menu. Enter the email address of the Qualtrics user with whom you would like to have access to your project. You can also control their access to your project in this screen. - To delete a project, click **Delete project** in the options menu.
Protect your Data	- Always be mindful of who has access to your data, especially if your data contains identifying information. - Never include identifying information in reports unless you have explicit consent to do so from your respondents.

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