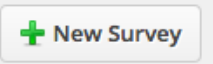



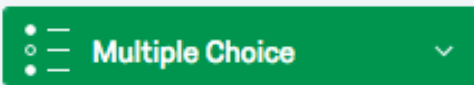


Transitioning Terminology: From FluidSurveys to Qualtrics

FluidSurveys	Qualtrics
<p>Signing in to your account</p> <p> or</p> <p></p>	<p>Sign into your account at:</p> <p></p>
<p>To begin adding questions </p>	<p>By default, you are taken right to the “edit” page once you hit “Create Project”</p>
<p>Add items from the left panel</p> <p>Questions Page Survey Options</p> <p>Drag or double-click questions to add »</p> <p>Basic Questions</p> <ul style="list-style-type: none"> Section Heading Yes/No Text Response Text Response Grid Multiple Choice Multiple Choice Grid Dropdown Dropdown Grid Checkbox Checkbox Grid Slider Date/Time <p>Advanced Questions</p> <p>Question Bank</p> <p>Click to Browse</p>	<p>Add items from the right panel. <i>Only when the question is selected can you change the default multiple-choice option.</i></p> <p>Change Question Type</p> <p></p> <p>Choices</p> <p>- 3 + Edit Multiple</p> <p><input type="checkbox"/> Automatic Choices</p> <p>Answers</p> <p><input checked="" type="radio"/> Single Answer</p> <p><input type="radio"/> Multiple Answer</p> <p>More...</p>

FluidSurveys Questions Types:

Basic Questions

- Section Heading 1
- Yes/No
- Text Response 2
- Text Response Grid 7
- Multiple Choice 3
- Multiple Choice Grid
- Dropdown 4
- Dropdown Grid
- Checkbox 5
- Checkbox Grid
- Slider 6
- Date/Time

Advanced Questions

- Matrix 8
- 3D Matrix 9
- Semantic Differential
- Hidden Field
- Net Promoter
- Timer 10
- Datasource
- Drill Down 15
- Ranking 11
- Group/Rank
- File Upload 12
- JavaScript
- Signature 13
- Payment Question
- Picture 14
- Web Service
- Image Heat Map
- Image HotSpot
- Score Display
- Max Diff Scale

Qualtrics Question Types:

- Static Content
 - Descriptive Text 1
 - Graphic 14
- Standard Questions
 - Multiple Choice 3, 4, 5
 - Matrix Table 9
 - Text Entry 2
 - Slider 6
 - Rank Order 11
 - Side by Side 8
- Specialty Questions
 - Constant Sum
 - Pick, Group, and Rank
 - Hot Spot
 - Heat Map
 - Graphic Slider
 - Gap Analysis
 - Drill Down 15
 - Net Promoter Score®
 - Highlight
 - Signature 13
- Advanced
 - Timing 10
 - Meta Info Question
 - File Upload 12
 - Screen Capture
 - Captcha Verification
- Replace From Library
 - Question Library

NOTE: To create a “checkbox”, or dropdown, or change the alignment of your response options you must click on the “multiple choice” option to expand for more options.

Static Content

- Descriptive Text
- Graphic

Standard Questions

- Multiple Choice**
 - Select Box
 - Multiple Selection Box
 - Dropdown List
 - Single Answer, Horizontal
 - Single Answer, Horizontal, Graphic
 - Single Answer, Vertical
 - Single Answer, Vertical, Graphic
 - Single Answer, Column, Text
 - Multiple Answer, Column
 - Multiple Answer, Column, Graphic
 - Multiple Answer, Horizontal
 - Multiple Answer, Horizontal, Graphic
 - Multiple Answer, Vertical
 - Multiple Answer, Vertical, Graphic
- Matrix Table
- Text Entry
- Slider
- Rank Order
- Side by Side

Specialty Questions

- Constant Sum
- Pick, Group, and Rank
- Hot Spot
- Heat Map
- Graphic Slider
- Gap Analysis
- Drill Down
- Net Promoter Score®
- Highlight
- Signature

Advanced

- Timing
- Meta Info Question
- File Upload
- Screen Capture
- Captcha Verification

Replace From Library

- Question Library

Editing your item/question in FluidSurveys:

1. Enter information in designated fields on the left
2. Add choices → using BULK allows for entering multiple items at once
3. Selected advanced options like: “appearance”, “optional”, “Randomize”, etc.

The screenshot displays the FluidSurveys interface for editing a question. The interface is divided into a left sidebar for configuration and a main preview area on the right.

Left Sidebar (Options Tab):

- Field Properties:**
 - Type: Multiple Choice
 - Identifier: None
 - Question Title: Question 1
 - Extra Description: (Empty text area)
- Choices:**
 - Choice 1
 - Choice 2
 - Buttons: + Add, Bulk, Extraction, + Add Other Choice
- Display:**
 - Appearance: Default
 - Columns: One
 - Display side-by-side: (Unchecked)
 - Append to previous question: (Unchecked)
 - Extra Classes: None
- Options:**
 - Optional: (Checked)
 - Randomize choices: (Unchecked)

Main Preview Area:

- Section: Survey Transition Time
- Question 1:
 - Choice 1
 - Choice 2
- Page 1 indicator at the bottom.

Editing your item/question in Qualtrics:

1. Enter information in designated fields on the RIGHT
2. Add choices → using EDIT MULTIPLE allows for entering multiple items at once
3. Selected desired advanced options: “Choices”, “Answers”, “Position”, “Actions” etc.
4. For more information on Specialty questions and Advanced options go to:
<https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/question-types-overview/>



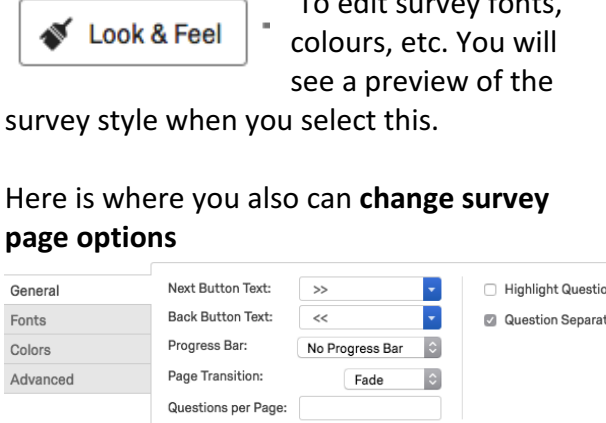
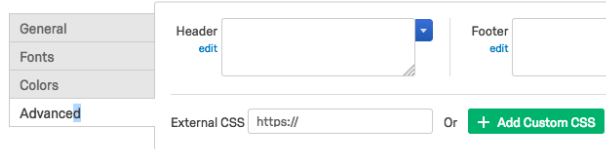

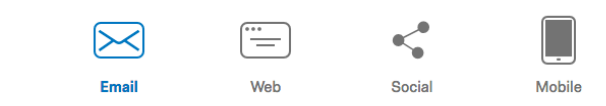
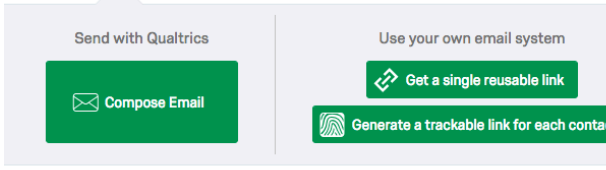
The screenshot displays the Qualtrics question editor interface. On the left, there is a text input area with the following content:

```
Options 1
Click to write Choice 2
Click to write Choice 3
```


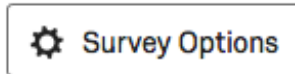
A callout box highlights the **Edit Multiple** button. The right sidebar contains the following settings:

- Change Question Type:** Multiple Choice
- Answers:** Single Answer (selected), Multiple Answer, More...
- Position:** Vertical (selected), Horizontal, More...
- Validation Options:** Force Response (unchecked)
- Validation Type:** None (selected), Custom Validation
- Actions:** Add Page Break, Add Display Logic, Add Skip Logic, Copy Question, Move Question

At the bottom left, there is a button labeled **Create a New Question**.

 <p>Style</p>  <p>Settings</p>	<p>To edit survey fonts, colours, etc.</p> <p>Where changing page options are</p> <p>To edit survey fonts, colours, etc. You will see a preview of the survey style when you select this.</p> <p>Here is where you also can change survey page options</p>  <p>and create an External CSS</p> 
 <p>Deploy</p> <p>Where you create a unique URL</p> <p>*This feature is not available in Qualtrics, only anonymous and personalized links are.</p> <p>You can however create a single test link to embed on webpage or email in Qualtrics. See notes immediately below.</p>	<p>Select “Distributions” on the top left of project page to generate specific links</p> <p>How do you want to distribute your survey</p>   <p>Qualtrics can generate a list of unique, or “Personal”, survey links. These links are tied to specific survey recipients, and the names and any other uploaded Embedded Data will be included with the responses in the results.</p>

In Qualtrics you can create a **Link Text** for anonymous reusable links. This will provide an HTML code below for the text of your choice as you type it into the **Link Text** box.

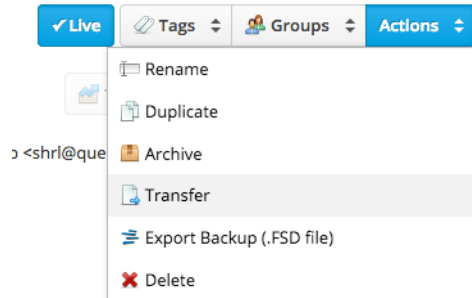
 <p>Where options for the survey settings edits are</p>	 <p>Contains:</p> <ul style="list-style-type: none"> - Survey Experience (page options) - Survey Protections - Survey Termination - Inactive Surveys - Partial Completion
--	--

<p>File Upload = a question type that allows respondents to upload a file to your survey, i.e., “Please upload your resume”.</p>	<p>File Upload is an add-on feature and is Enabled/Disabled?</p>
---	--

<p>Picture/Video Based Questions</p>	<p>Insert Media: Qualtrics accepts most image file types, though they recommend saving your image as a PNG rather than a JPG.</p> <p>As well you can upload mp4 video files to your personal library for use in surveys. Qualtrics has a limit of 16 MB for files. They</p>
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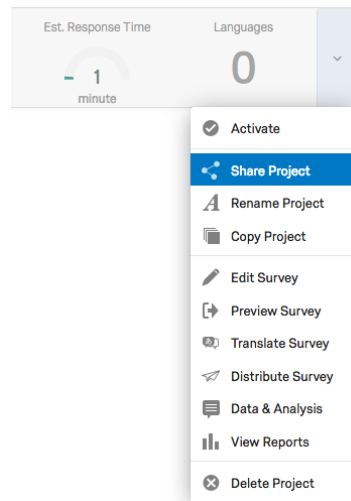
In FluidSurveys you could **collaborate (share)** with users on any survey saved within a Group.

You can also **Transfer Survey** To another user via email.

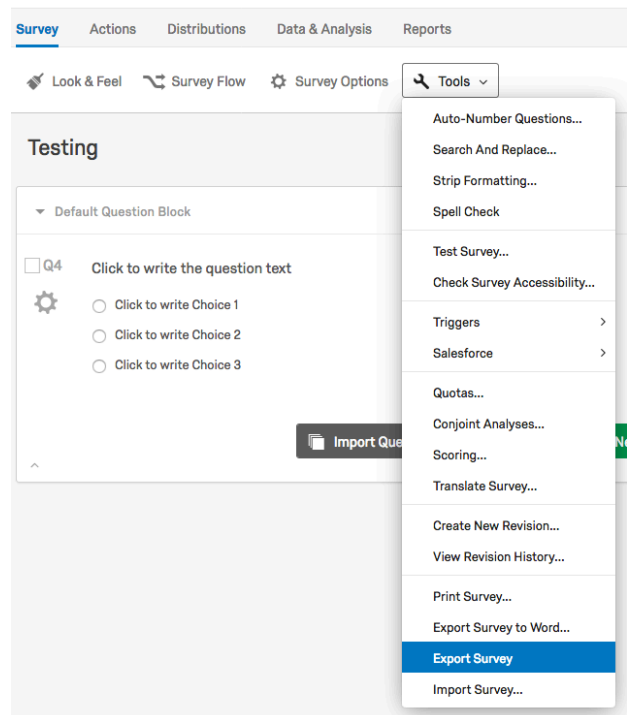


recommend using YouTube embed URLs instead.

[Sharing a Project](#) in Qualtrics can be done from the main dashboard page of a projects folder. This allows you to invite collaborators without the need for a Group.

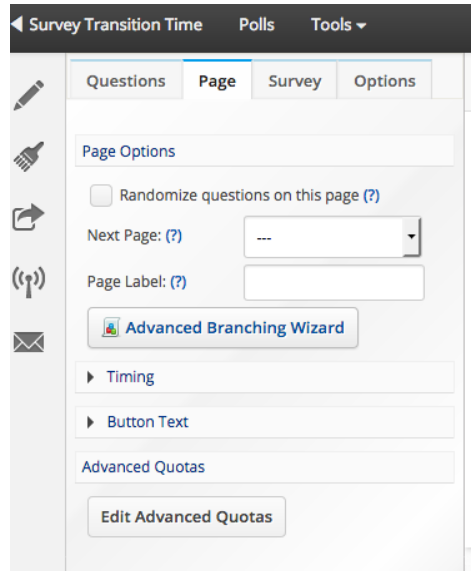


To **Transfer** a Qualtrics Survey to another user you must [Export](#) your survey in .QSF format. You can then email the file to the person you wish to transfer it to.



Branching and Logic

Under Page tab of a survey use the “Advanced Branching Wizard”



NOTE: Only [Admins](#) can transfer ownership of projects between users.

Using [Logic in Qualtrics](#) includes:

- [Branch Logic](#) for showing a block of questions conditionally.
- [Display Logic](#) for showing a single question conditionally.
- [Email Triggers](#) for conditionally sending an email upon survey completion.
- [Contact List Triggers](#) for conditionally adding a respondent to a contact list upon survey completion.
- [Quotas](#) for determining which respondents should count toward a response limit you set.
- [Custom Validation](#) for requiring respondents to meet certain answer requirements before proceeding in a survey.

See this [video](#) for further explanation and training.

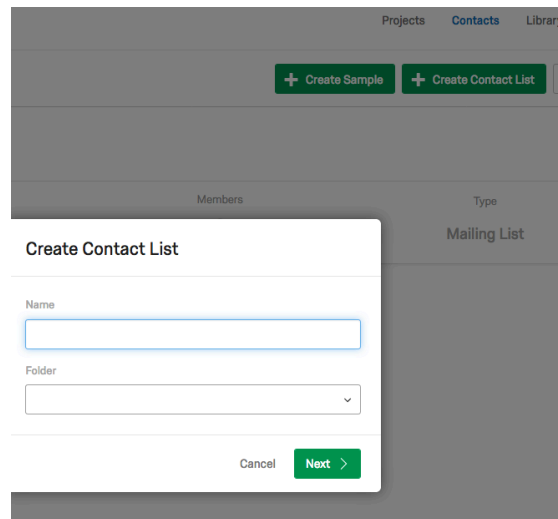
Click on the **Invites** icon from the survey dashboard to access:

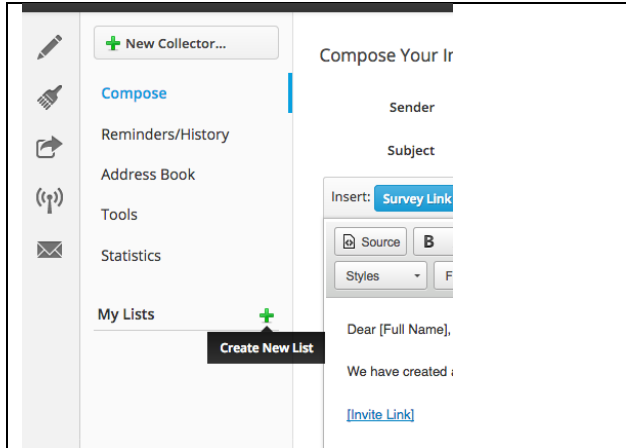


- **Address Book**
- Add Contacts –
- Manage email lists
- Send **Email** invites to Surveys

[Contact List](#)

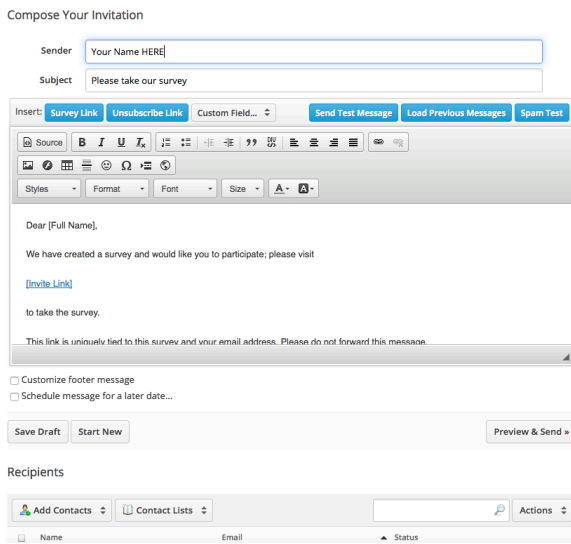
Click on “Contacts” on the top right of your main page to create your lists.



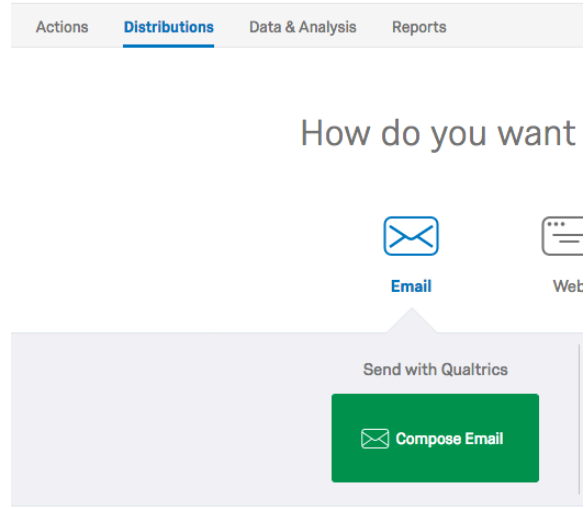


- You can organize specific folders for different email lists.
- You can import or export email lists (CVS only)
- You can Share lists in Groups (only if user is in a Group)

Email Survey in FluidSurveys is also under the Invites section.



To email a survey link to a contact list click on **Distributions** within your **Project** page Testing ▾



Select **Compose Email** to access survey email system.

Compose Email

From Address: noreply@emailsserver.com | From Name: YOUR NAME | Reply-To Email: EDITABLE

When: Send in 1 hour

Subject: Subject

Message:

Follow this link to the Survey:
 \${!://SurveyLink?d=Take the Survey}

Or copy and paste the URL below into your internet browser:
 \${!://SurveyURL}

Follow the link to opt out of future emails:
 \${!://OptOutLink?d=Click here to unsubscribe}

Buttons: Show Advanced Options, Cancel, Send Preview Email, Send in

Deploy launches the survey once you change deployment status to live

Distributions allows you to send your survey out through various mediums. NOTE: Offline App is an add-on feature that is NOT enabled.

Generating reports in FluidSurveys for viewing or export.

Reports ([Overview](#))
 Click on **Reports** at the top of your main project page to access variety of Report options. See: [Export Reports Options](#).

Responses

In FluidSurveys responses (or data sets) are exported by selecting **Export Responses** in CSV, XML, and SPSS format.

Export Responses

Export Format: **CSV** XML SPSS PDF Word

Responses: **All (10)** Selected (0)

Advanced Options: **Titles** Titles & Identifiers Identifiers Custom

- Excel Compatible (UTF-16, tab-separated)
- Split into files of 255 columns each (for old versions)
- Export scores instead of labels
- Include row number for each response
- Include unique identifier for each response
- Export questions on separate rows (for database im
- Replace newlines characters with \n
- Replace newline characters with spaces

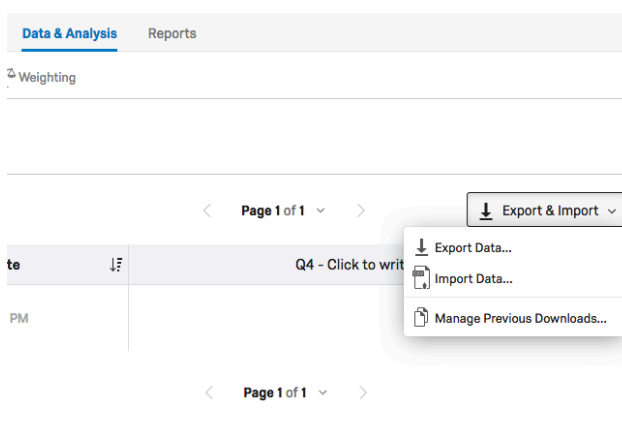
Preview

In FluidSurveys you can **Preview** the whole survey and, **Preview Page** by page as you construct them.

[Preview Page](#)

Exporting Data

In Qualtrics you can export data from the **Data & Analysis** section.



Select Download Data Table

Export Data

Download Data Table

Download columns and filtered data from the Data tool. This download cannot be imported into Qualtrics.

Exporting file types include: CSV, TSV, XML, and SPSS.

Preview Survey

In Qualtrics **Preview Survey** within the Project dashboard.

<p>Print Survey Under Deploy you can Print Survey to PDF or Word. Print Deployment (Export)</p> <p>Export Format Print (beta) PDF (beta) PDF (legacy) Word</p> <p>General Options <input checked="" type="checkbox"/> Display title and description at the top of the document <input checked="" type="checkbox"/> Create a new page for each survey page</p> <p>Page Options <input checked="" type="checkbox"/> Show page numbers <input checked="" type="checkbox"/> Show branching information</p> <p>Question Options <input checked="" type="checkbox"/> Show question identifiers <input type="checkbox"/> Show looping indicators</p> <p>Export Survey ></p>	<p>Export to Word</p> <p>Export Survey to Word</p> <p>When exporting your survey to Word, question presentation may be different and may not reflect all formatting customizations.</p> <p><input checked="" type="checkbox"/> Show Question Numbers <input checked="" type="checkbox"/> Show Logic <input checked="" type="checkbox"/> Show Coded Values <input checked="" type="checkbox"/> Strip HTML Tags from all Questions and Answers</p> <p>Cancel Export</p>
<p>Groups – In FluidSurveys users could create their own Groups and manually invite other FS users.</p>	<p>Groups in Qualtrics are created by Admins only. If a Division (or department) would like to manage groups, requests can be made to [Insert how to request a group]</p> <p>Groups can shared Libraries and Contact Lists.</p>