



This document provides an introduction to creating and distributing a survey using the online tool Qualtrics. In particular, it uses the example of creating a travel preferences survey to demonstrate the following concepts:

- [Creating a new survey](#)
- [Question types](#)
- [Editing questions](#)
- [Question blocks](#)
- [Question behaviour \(including display logic and skip logic\)](#)
- [Piped text](#)
- [End of survey message](#)
- [Survey flow \(including branch logic and embedded data\)](#)
- [Survey look and feel \(including theme and background\)](#)
- [Survey options \(including scoring, email triggers and quotas\)](#)
- [Publishing, distributing and analysing a survey](#)

Note that you can also experiment with any of these concepts using a survey topic of your choice.

## 1. Creating a new survey

To get started using your Curtin Qualtrics account, go to <https://curtin.qualtrics.com/> and log in with your Curtin ID and password.

To create a new survey select the 'Create new project' button on the top-right corner of the screen, then choose 'Survey' underneath 'Projects from scratch' (or choose from a guided project or template if desired). Select 'Get started', then give your survey a name (for example, *Test survey*) and select whether you want to create a blank survey or to import, copy or use an existing survey. Select 'Create project'.

Alternatively, if someone has shared a project with you it should be displayed in your list of projects. Select the project to open it if so.

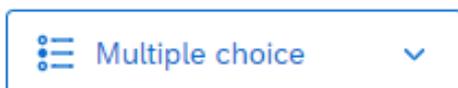
## 2. The survey builder

The survey builder will open automatically when you create a new project or select an existing one, and is where you create and edit your survey. This section details some of its key features and components.

### 2.1 Adding and importing questions

Each blank survey starts off with a blank 'Multiple choice' question in the 'Default Question Block' (see Section 2.3 for information on question blocks). You can change the type of this question by selecting it and choosing from the available question types using the 'Question type' drop down list in the 'Edit question' menu at the left of screen:

#### Question type



Similarly, when you select 'Add new question' you can choose from the list of available question types, and you can always change this later as detailed above. When using the Curtin Qualtrics license there is a large range of question types to choose from, as listed below (to find out more about a question type, click on the relevant link):

- [Multiple choice](#)
- [Text entry](#)
- [Text/Graphic](#)
- [Matrix table](#)
- [Slider](#)
- [Form field](#)
- [Rank order](#)
- [Side by side](#)
- [Net promoter score](#)
- [Timing](#)
- [Graphic slider](#)
- [Constant sum](#)
- [File upload](#)
- [Pick, group and rank](#)
- [Drill down](#)
- [Signature](#)
- [Heat map](#)
- [Hot spot](#)
- [Meta info](#)
- [Captcha verification](#)
- [Highlight](#)

For example, you might want to change the blank 'Multiple choice' question in your *Test survey* to the 'Text/Graphic' question type, so that you can write an introduction or some instructions for your survey.

You could then add a 'Text entry' question asking the participant for their postcode (note that you could also use the 'Form field' question type for this, but that this is usually used when more than one text box is required – for example to capture different fields of the participant's address). If you like, you can adjust the size of the text box by hovering over the right hand side of the box and clicking and dragging.

Note that in addition to the 'Add new question' option, there is also the option to 'Import from library'. This allows you to import a question either from the Qualtrics Library (which has a range of surveys and questions to choose from, including common demographic questions), or from any other survey you have previously created or had shared with you. It can save you a lot of time re-writing questions!

[Import from library](#)

[+ Add new question](#)

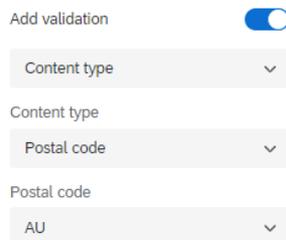
## 2.2 Editing questions

You can perform various question actions using the menu that appears when you select the three dots at the top-right corner of the relevant question. This menu provides options such as moving the question (which you can also do by dragging and dropping), copying the question, adding a page break, deleting the question, replacing the question with one from a question library, etc.

For example, in your *Test survey* you could use the menu on the first 'Text/Graphic' question (where you have provided instructions) to add a page break below it so it appears on its own page (you can also add a page break by hovering below the question and selecting '+ Add page break').

Additionally, you can make edits to a question by selecting it and choosing from the options that appear on the 'Edit question' menu to the left of screen. These options vary according to the question type, but may include choosing the text type (e.g. single or multiple lines), allowing multiple answers, changing the number of choices, changing the formatting of the choices, adding requirements (such as forcing or requesting a response), adding validation, and adding question behaviour (detailed in Section 2.4).

For example, you may like to add validation to the postcode question in your *Test survey* to check that the participant enters a valid Australian postcode. To do this, first select the question then toggle on 'Add validation' and choose 'Content type' then 'Postal code' and 'AU':



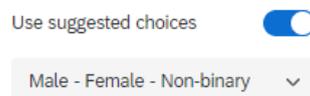
Add validation

Content type

Content type

Postal code

Something else to note is that when you add a 'Multiple choice' question to a survey, often the choice options will be populated with 'suggested choices' (depending on the question). For example, if you add a 'Multiple choice' question to the *Test survey* asking which gender the participant identifies as, suggested choices will be added. You can still edit, add or remove choices when using suggested choices, or you can select a different suggested choice (if relevant) from the 'Edit question' menu at the left of screen. You can also use this menu to toggle on and choose from suggested choices if they don't automatically appear.

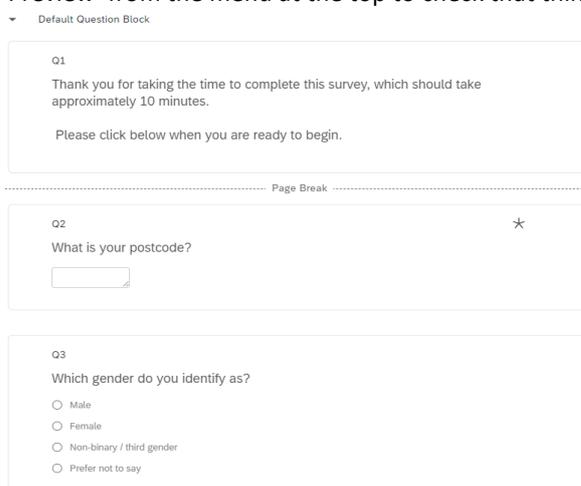


Use suggested choices

Male - Female - Non-binary

As you go about adding questions, you may notice that they are numbered in the order they are created, rather than the order in which they appear in the survey – meaning that if you add and then delete a question, or move questions around, the numbering will get mixed up. The question numbers are not visible to participants (unless you make them visible through the 'Survey options' – see Section 5) so it is not a problem in that respect, but if you would like to have the questions numbered in the correct order for organisational purposes, note that you can change a question number by clicking on it and editing. Alternatively, you can automatically re-number questions by selecting the 'Tools' drop down menu at the top of the survey, choosing 'Auto-number questions' and selecting the type of numbering you wish to use.

So far, your *Test survey* questions might look like the following in the survey builder (you can also choose 'Preview' from the menu at the top to check that things will display as you expect for participants):



Default Question Block ...

Q1  
Thank you for taking the time to complete this survey, which should take approximately 10 minutes.  
Please click below when you are ready to begin.

Page Break

Q2  
What is your postcode? \*

Q3  
Which gender do you identify as?  
 Male  
 Female  
 Non-binary / third gender  
 Prefer not to say

## 2.3 Question blocks

Qualtrics surveys are organised into 'blocks' of questions, and each blank survey starts off with one 'Default Question Block'. If wished, you can change the name of this block to a more meaningful name by clicking on it and typing (note that these names are not visible to survey participants). For example, the first block in your *Test survey* could be called 'Demographics'.

For a simple survey it is fine to just have one block of questions, but you may like to group questions in a longer survey into blocks – both for your organisational purposes, and so that the participant views them on separate pages (alternatively, you can add page breaks between questions in the same block to have them display on separate pages for the participant – see Section 2.2). Another reason to use multiple blocks would be to customise the flow of your survey to do different things with different blocks of questions. For example, you may want to direct respondents to certain blocks of questions depending on how they answer questions in your 'Demographics' block. How to do this is detailed in Section 3.1.

If you do want to add more question blocks to your survey you can do so by selecting the 'Add Block' button, and you can reorganise any blocks you have created by selecting and dragging them to the appropriate spot in your survey. Alternatively, you can also perform these actions through the block menu, which you can view by selecting the three dots at the top right corner of the relevant block. This menu also provides options such as duplicating the block, deleting the block, collapsing the questions in the block (so you only see the questions, not any answer choices, in the survey builder), etc.

You can also make other edits to the block by selecting it (make sure you select the block itself rather than a question within it) and choosing from the options that appear on the 'Edit block' menu at the left of screen. Options provided here are ['Question randomization'](#); ['Loop & merge'](#); and 'Next/Previous button text', which allows you to enter text that will appear on any Next or Previous buttons in the block. For example, you might like to format the 'Next/Previous button text' in your *Test survey* so that the 'Next Button Text' reads 'Next' (you can also do this for all the blocks in a survey at once, as in Section 4.3):

Next/Previous Button Text

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Previous Button Text:

Next Button Text:

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[Close](#) [Save](#)

## 2.4 Question behaviour

You have the option to add different types of behaviour to each question you create in a survey. While this isn't essential, and may not be required for a simple survey, you will often find that adding question behaviour helps to customise and improve your survey. For example, you could use a behaviour called 'Display logic' to only display a question when a certain condition is met, and/or you could use a behaviour called 'Skip logic' to skip the participant ahead to a future point in the survey based on their response to a question. These examples will be explained in more detail in the following sub-sections. To find out more about these and other types of question behaviour (noting that not all are available for each question type) click on the relevant links below:

- [Display Logic](#)
- [Carry Forward Choices](#)
- [Skip Logic](#)
- [Add JavaScript](#)
- [Add Default Choices](#)
- [Recode Values](#)
- [Choice Randomisation](#)



## 2.4.1 Display logic

Display logic is used when you only want to display a question, or to display certain answers to a question, when a specified condition or conditions are met (note that if you want to skip the participant to a later part of the survey instead you will need to use skip logic, as covered in Section 2.4.2, while if you want to conditionally display a block of questions rather than a single question you will need to use branch logic, as covered in Section 3.1). The condition or conditions you set could be based on a number of things, but the most common are probably conditions related to question responses, embedded data and quotas.

As an example of using display logic, suppose that as part of the 'Demographics' question block in your *Test survey* you would like to know whether or not the participant has children and, if they do, how many of them are aged under 18. To do this, first add a new 'Multiple choice' question asking whether or not the participant has children (with Yes or No responses). Next, add a follow up 'Multiple choice' question asking them how many of their children are aged under 18 (with five choices; 0, 1, 2, 3 and 4 or more).

This second question should only display if the participant has previously indicated that they have children, so to enable this select the number of children question and choose 'Display logic' from the 'Edit question' menu to the left of screen. Now specify the condition that needs to be true in order for the question to display; for example, select the 'Do you have any children?' question and choose 'Yes' and 'Is Selected'. Additionally, tick the 'In Page' box so that the question appears on the same page as the previous question when the participant views the survey. Finally, select 'Save'.

Display this Question only if the following condition is met:

Q5 Do you have any children? ▾	Yes ▾	Is Selected ▾	<span style="color: red;">-</span> <span style="color: green;">+</span>
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In Page Close ✓ Save

If you preview the survey, you should see that the number of children question only appears when you answer 'Yes' to having children.

## 2.4.2 Skip logic

Skip logic enables you to skip the participant to a later part of the survey based on their response to a question. Participants can be skipped ahead to a question in the current block, to the end of the current block, or to the end of the survey (if you want to skip them to another block, you'll need to skip them to the end of the block and then use branch logic, as covered in Section 3.1, or display logic, as covered in Section 2.4.1, depending on exactly what you'd like to do).

As an example, suppose that you would like to start your *Test survey* with a question that asks the participant whether or not they are willing to provide demographic information. If they are, they will proceed to the next question as normal. If not, they will be skipped to the end of the 'Demographics' block. To do this, first add a new 'Multiple choice' question asking the participant if they are happy to answer some demographic questions (with Yes or No responses). Move the question so that it sits below the first question's page break, and add a page break below it as well (you can then use the 'Auto-number questions' feature in the 'Tools' drop-down menu to automatically re-number the questions if desired).

To add skip logic to this new question, select the question and choose 'Skip logic' from the 'Edit question' menu to the left of screen. Now specify where the participant should be skipped to and when, by choosing 'End of Block', if 'No' 'Is Selected'. Press 'Confirm'.

Skip from this question to

End of Block ▾	if	No ▾	Is Selected ▾
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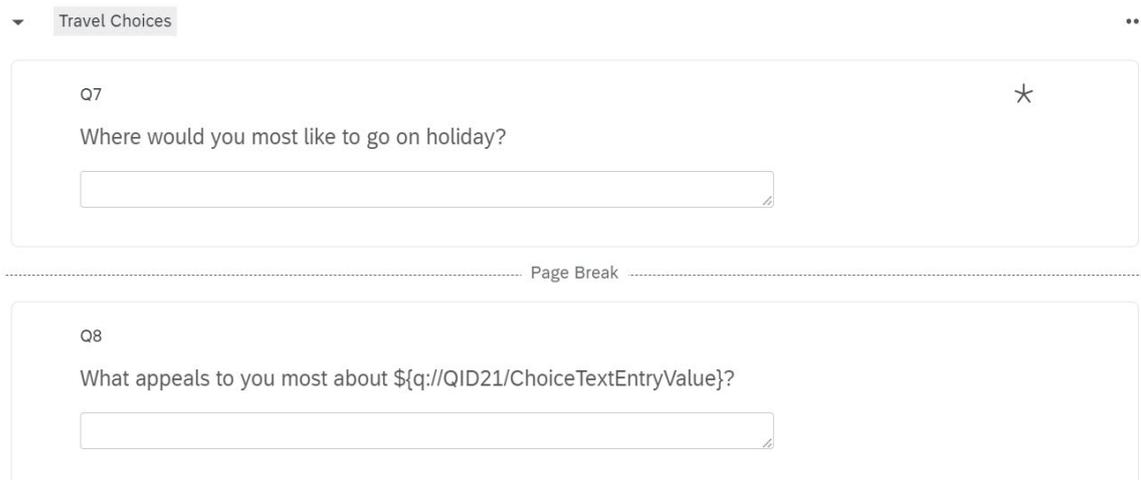
If you preview the survey, you should be skipped to the end of the 'Demographics' block (which is currently the end of the survey) if you answer 'No' to the question about demographics.

## 2.5 Piped text

Piped text allows you to customise your survey to include words, phrases or values that have been sourced from various places – such as a participant’s response to a question or their score (see Section 5.1 for information about scoring). For example, you could ask a participant where they would most like to go on holiday, and then use their answer in a follow up question to ask about their choice.

To implement this example in your *Test survey*, first add a new block below the ‘Demographics’ block by selecting ‘Add Block’, and rename it ‘Travel Choices’ (don’t worry about formatting the ‘Next/Previous’ button for now; how to do this for all blocks at once is covered in Section 4.3). Next, add a new ‘Text entry’ question asking where the participant would most like to go on holiday. Force a response to this question, to ensure you receive an answer, by toggling on ‘Add requirements’ and keeping ‘Force response’ selected (in the ‘Edit question’ menu on the left of screen).

Next, select the three dots at the top right hand corner of the question and choose ‘Add page break’, then add a new ‘Text entry’ question to sit below this page break. This question will ask what appeals to the participant most about their selected holiday destination, using piped text to include the name of the destination specified in the previous question. To do this, begin typing the question (e.g. ‘What appeals to you most about’), then when the piped text is required select the ‘Piped Text...’ tab (in blue above) and choose ‘Survey Question’. Navigate to the question asking where they would like to go on holiday, and then choose it again (don’t select ‘Question Text’, as that will pipe the question rather than the answer). Finally, add a question mark after the piped text to complete the question. The questions should now look something like the following (note that the question ID may be different in your piped text):



The screenshot shows a survey editor interface. At the top, there is a dropdown menu labeled 'Travel Choices' and a three-dot menu icon. Below this, there are two question blocks. The first block, labeled 'Q7', contains the question 'Where would you most like to go on holiday?' and a text entry field. The second block, labeled 'Q8', contains the question 'What appeals to you most about \${q://QID21/ChoiceTextEntryValue}?' and a text entry field. A dashed line labeled 'Page Break' is positioned between the two question blocks.

Preview the survey to check that this has worked correctly (you may like to select ‘No’ to the question about answering demographic questions to confirm that the skip logic takes you to the new block), or alternatively just preview the question block through the block menu (by selecting the three dots at the top right corner of the block).

## 2.6 End of survey message

The default message that participants will see when they finish completing a survey is as follows:

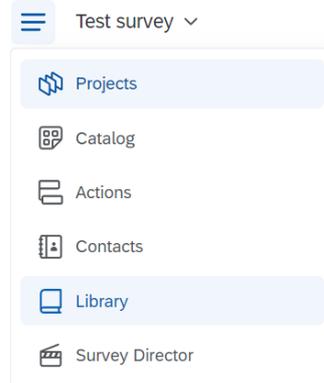
We thank you for your time spent taking this survey.

Your response has been recorded.

Sometimes you may wish to change this though – to provide a customised message, to redirect to a URL or to include a response summary.

For example, to add a custom message to your *Test survey* select the 'End of Survey' block and change the 'End of survey message' from 'Default' to 'Custom' (in the 'Edit end of survey' menu at the left of screen). Choose to 'Load a saved message', select the appropriate library (for example your own library) and select 'New message' (or choose a previously created message). Type a description, then add your custom message in the box below and select 'Save'.

Note that if you want to make edits to a custom message you will first need to choose 'Library' from the drop down menu at the top of the screen (to the left of the survey title):



Next, choose 'Messages Library' from the tabs at the top, select the message that you want to edit, select 'Edit', make the required changes and then press 'Save'. When you are finished, navigate back to the project by selecting 'Projects' from the drop down menu at the top of the screen (as shown above) and choosing the appropriate project (e.g. *Test survey*). Alternatively, you could just create a new message if preferred.

If you wish to provide the participant with a summary of their responses instead of a customised message (only one or the other can occur), you should select 'Include response summary' from the 'End of survey message' menu instead. Participants can then download their responses as a PDF if wished.

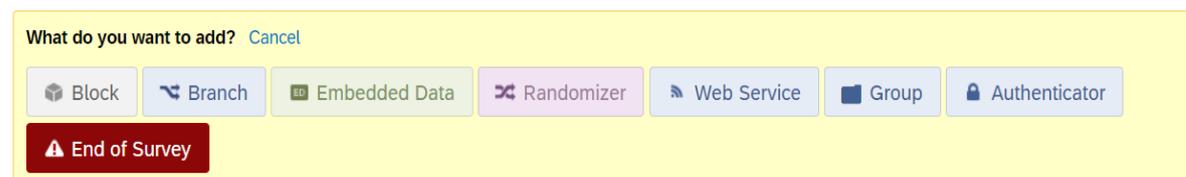
### 3. Survey flow

The 'Survey flow' section of Qualtrics allows you to view the block or blocks of questions in your survey, and to add in other elements. If you only have one block of questions you won't need to make use of this section, but for surveys with more than one block it allows the blocks to be easily rearranged, and for the survey flow to be customised – such as through branching logic.

To access the survey flow section of Qualtrics, click on the 'Survey flow' icon on the navigation menu at the far left of the screen:



You will see the question blocks that currently appear in the survey, and can add new blocks, move blocks, duplicate and delete blocks as desired. You can also add in other elements such as [Branch](#), [Embedded Data](#), [Randomizer](#), [Web Service](#), [Group](#), [Authenticator](#) and [End of Survey](#).



The most commonly used of these elements are usually the 'Branch' and 'Embedded Data' elements, which are detailed in the following sections.

## 3.1 Branch logic

Branch logic is used to conditionally display blocks of questions (or other survey elements) based on information such as question responses. It allows you to customise the flow of your survey to best suit the respondent. For example, you could customise your *Test survey* by asking the participant whether or not they have ever previously visited their chosen holiday destination, and directing them to different blocks of questions accordingly.

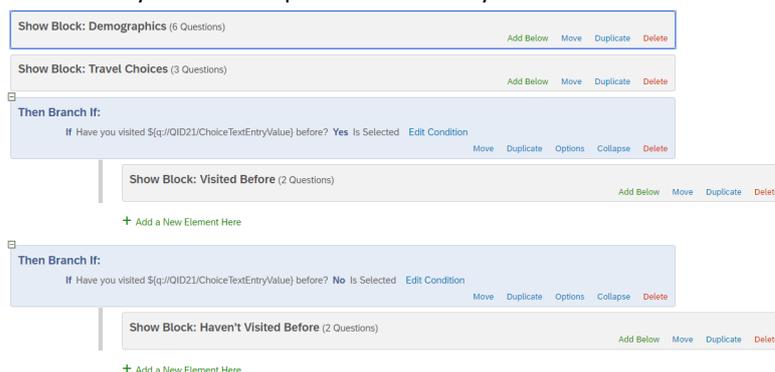
To do this, first return to the survey builder (if required) and add a new 'Multiple choice' question to the 'Travel Choices' block which asks the participant whether they have visited their chosen holiday destination before (use piped text, as in Section 2.5, to include the name of the destination in the question). Include Yes or No response options, and force a response to this question by toggling on 'Add requirements' and keeping 'Force response' selected (on the 'Edit question' menu on the left of screen), if you want to ensure the participant follows one of the branching options. Alternatively, if you don't force a response then the participant will just be taken to the next block after the branching blocks (or to the end of the survey if there are no other blocks) if they don't answer the question.

Now add a new block below the 'Travel Choices' block by selecting 'Add Block', and rename it 'Visited Before' (don't worry about formatting the 'Next/Previous button for now; how to do this for all blocks at once is covered in Section 4.3). Add some 'Multiple choice' questions, with relevant answer options, to this block; for example asking how many times the participant has been to their selected holiday destination and how long ago they last visited (use piped text to display the name of the destination in the questions again).

Similarly, add another block below this one called 'Haven't Visited Before', and add some 'Multiple Choice' questions with relevant answer options; for example asking whether they know anyone who has been to their selected holiday destination, and whether they plan to visit there in the next year. If desired, re-number all questions at this point by selecting the 'Tools' drop down menu at the top of the survey, choosing 'Auto-number questions' and selecting the type of numbering you wish to use.

Next go to 'Survey flow' and add a branch below the 'Travel Choices' block, by choosing 'Add Below' and selecting 'Branch'. Repeat the process to add another branch directly above the first one. Select 'Add a Condition' on the top branch and then set up the required condition by selecting the relevant question (i.e. the one asking whether they have visited the destination before), selecting 'Yes' and 'Is Selected'. Click 'OK', then select 'Move' on the 'Visited Before' block and drag it to sit below the top branch (alternatively, you could have selected 'Add a New Element Here' and created the block at this point).

Finally, click 'Add a Condition' on the bottom branch and then set up the required condition by selecting the relevant question (i.e. the one asking whether they have visited the destination before), selecting 'No' and 'Is Selected'. Click 'OK', then select 'Move' on the 'Haven't Visited Before' block, and drag it to sit below the bottom branch (alternatively, you could have selected 'Add a New Element Here' and created the block at this point). Select 'Apply' to save the changes. The survey flow should look as follows - go back to the survey builder and preview the survey to check that it works as expected.



## 3.2 Embedded data

Embedded data allows you to record extra information in your survey, in addition to the participant's responses. For example, you could use embedded data to store information that is saved in a contact list (see Section 6) or to record a participant's score.

Once you have added embedded data to your survey you can use it in a few different ways, including as piped text and as part of branch logic or display logic. For an example of creating embedded data to record a participant's score and then using it as part of display logic see Section 5.1. Or for more information on embedded data, see <https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/standard-elements/embedded-data/>

## 4. Look and feel

The 'Look and feel' section of Qualtrics allows you to customise the look of your survey – changing the theme and adjusting the layout, colours, font and background as desired. To access this section of Qualtrics, click on the 'Look and feel' icon on the navigation menu at the far left of the screen:

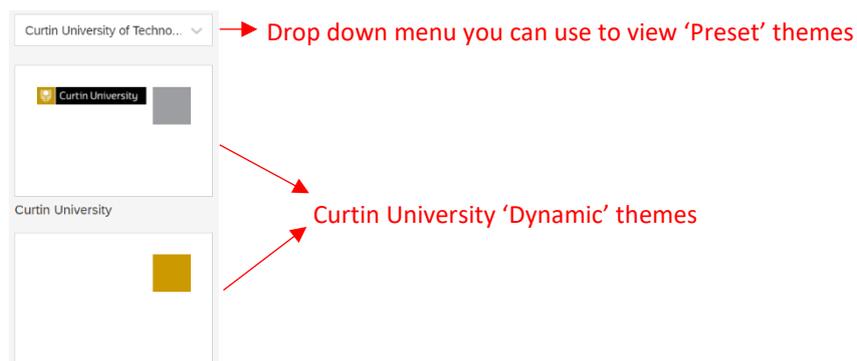


### 4.1 Survey theme

To ensure a consistent look and feel is applied to each page of a survey, Qualtrics uses survey 'themes'. There is a library of themes to choose from, and you can customise various aspects of these themes as detailed in Sections 4.2 and 4.3.

There are two different types of themes: 'static' themes and 'dynamic' themes. Static themes don't allow the layout, logo or background of the theme to be customised, whereas dynamic themes allow all aspects of the theme to be customised.

If you are using the Curtin Qualtrics licence and would like your survey to have a Curtin University theme, there are two 'static' and two 'dynamic' themes to choose from. Alternatively, you can choose 'Presets' from the 'Dynamic Themes' drop down menu and choose from one of the other theme options, or you can start from scratch with a 'Blank' theme. You can click on any of the themes to see a preview.



For the purposes of experimenting with different looks for your *Test Survey*, choose the 'Blank' theme option (underneath the Curtin University 'Dynamic' themes) and select 'Apply'.

### 4.2 Survey background

If you are using a dynamic theme, you can opt for your survey to have a different background colour or image by selecting 'Background' from the left menu.

To change the background colour, click in the 'Background Color' box and either manually choose a colour by dragging the circle to select, or enter HEX, RGB or HSL values.

To add a background image, choose 'Photo' from the 'Background Type' drop down menu, then select 'Change Image' and either click on 'Upload a New Graphic' (which allows you to upload a graphic or to use a graphic from the web) or choose a previously uploaded image. You can then adjust the overlay colour and opacity as desired.

Experiment with changing the colour or adding a background image for your *Test Survey*, and select 'Apply' when you are happy with the background.

#### 4.3 Other survey look and feel options

If you are using a dynamic theme, you can select from a choice of three different survey layouts by selecting 'Layout' from the left menu.

Furthermore, you can make changes to the next and previous button text, add a progress bar and/or add a header or footer to the survey by selecting 'General' from the left menu. For example, you could change the 'Next Button Text' to say 'Next' throughout your *Test Survey*, and add a progress bar with text.

Finally, you can make changes to 'primary' and 'secondary' survey colours (e.g. colours of things such as the 'Next' boxes), adjust the font style and size, change the question spacing, and add in 'Custom CSS' (to further customise the look and feel of the survey) by selecting 'Style' from the left menu. You can also make changes to the page transition by selecting 'Motion' from the left menu, and add in a logo by selecting 'Logo'. Make sure you click 'Apply' after making any changes.

#### 5. Survey options

The 'Survey options' section of Qualtrics allows you to make other changes to your survey settings, from adding a back button to setting up email triggers. To access this section of Qualtrics, click on the 'Survey options' icon on the navigation menu at the far left of the screen:



To add a back button to your survey, for example, select 'Responses' from the left menu, then toggle on 'Back button' (note that you may then want to change the text of this button, either for the whole survey or for specific block(s), as detailed in Sections 4.3 and 2.3 respectively).

As another example, if you wish to add question numbers that are visible to participants then select 'General' from the left menu and toggle on 'Question numbers' (although note that if you want to indicate survey progress to participants it is recommended you add in a progress bar, as detailed in Section 4.3).

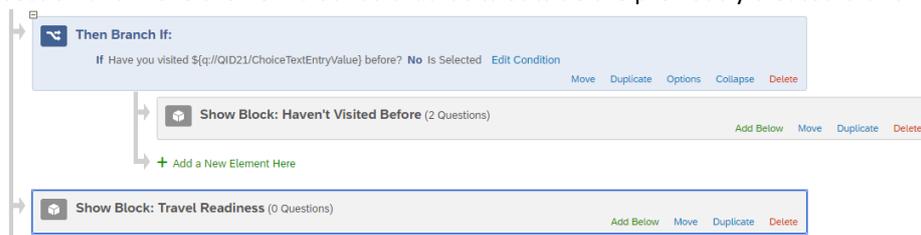
While there are many other things you can change in 'Survey options', the remainder of this section focuses on three of the most common and slightly more advanced: how to score answers, how to set up email triggers and how to set quotas.

#### 5.1 Scoring

You can use scoring to assign point values to a question or questions in your survey. Furthermore, you can sum scores using one or more categories and can display these scores at the end of each question, at the end of the survey, or indeed as part of any subsequent question/s (you can even provide scores in an email as part of email triggers, as detailed in Section 5.2). Note that only certain question types (including multiple choice, matrix, text entry and slider) are compatible with scoring; see [here](#) for a complete list.

As an example, you could add a travel knowledge question to your *Test Survey* and use this to calculate a 'Travel readiness' score, then provide this score and relevant travel information to the participant.

To do this, first add a new 'Travel Readiness' block to your *Test Survey*, then navigate to the 'Survey flow' section and move the new block so that it sits outside the previously created branches. For example:



Next, add a question with options relating to travel readiness (e.g. the following, or a shorter version):

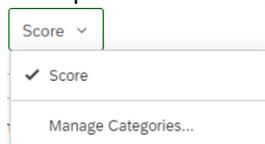
Q14

Please read the following list of statements about travel, then select those that apply to you. This will allow us to rate your travel readiness and to provide appropriate information to ensure you get maximum enjoyment out of your travel experience.

- I am aware of my travel insurance options, and what kind of travel insurance I might require when travelling
- I know where to find information about relevant visas required for travel
- I know where to find information about relevant vaccinations required for travel
- I know where to find information about accommodation options
- I know where to find information about travel transportation options
- I am familiar with the options available for spending money overseas

Make sure that you select 'Allow multiple answers' for this question so that participants can choose multiple statements (alternatively, you could create a set of separate Yes or No questions if preferred).

To add scoring to this question go to 'Survey options' and to 'Scoring', then select the 'Score' category up the top and click on 'Manage Categories...':



Now select 'Score' to rename it (make sure you click on the text itself), for example to 'Travel Readiness' (while this is optional, it is helpful to give your scoring categories relevant names - particularly if you are going to have more than one). At this point you could also select to have the scoring shown at the end of the survey or after each question, however we will use piped text to display the score in context for this example instead. Select 'Save'.

Next, scroll down to the 'Travel Readiness' block and to the question that is going to be scored, then assign a score to each statement. While these might sometimes be different, in this case just assign a value of 1 to each statement by selecting it. Once you have done this, select 'Back to Editor' from the top to return to the editor.

To display this score to the participant in context on the following page of the survey, add a 'Text/Graphic' question below the travel statement question – adding a page break in between so that the score shows on the next page. Next, use piped text (as detailed in Section 2.5) to include the score in a sentence. When you do this, note you will need to select 'Scoring', 'Travel Readiness' and 'Score' for the piped text. Your question should look something like the following (note the score ID may be different in your piped text):

Q15

Based on your responses, your travel readiness score is  $\{gr://SC\_4UZYACMV5PlzAbQ/Score\}/6$ .



While you can also include information in this statement about what to do in the case of different scores, as a next step you may want to customise your survey to provide different responses to the participant based on their score.

One way of doing this is using branch logic, and in particular you would use this if you wanted to display a different end of survey message depending on the participant's score. For instructions on doing this see: <https://www.qualtrics.com/support/survey-platform/common-use-cases-rc/displaying-messages-based-on-scoring/>

For this example, however, we will use display logic (detailed in Section 2.4.1) to display a different response for three different score ranges. To do this, first move the previously created question to a new block below the 'Travel Readiness' block, perhaps titled 'Travel Readiness Results'. Next adjust the text so that it is relevant to people who did not obtain a good score (for example, a score between 0 and 2), then add two more similar questions which are relevant to people who obtained a good and perfect score respectively. For example:

Q15

Based on your responses, your travel readiness score is  $\{gr://SC\_4UZYACMV5PlzAbQ/Score\}/6$ .

Given your score, we would highly recommend you read through our travel resources available \*here\*.

Q16

Based on your responses, your travel readiness score is  $\{gr://SC\_4UZYACMV5PlzAbQ/Score\}/6$ .

Given your score, you may like to read through our travel resources available \*here\*.

Q17

Based on your responses, your travel readiness score is  $\{gr://SC\_4UZYACMV5PlzAbQ/Score\}/6$ .

Given your score, it looks like you are ready to travel!

In order to add display logic for these questions based on the scoring, you first need to add an 'Embedded Data' element (as detailed in Section 3.2) to the survey flow. Note that this needs to sit below the 'Travel Readiness' block (i.e. below where the score is calculated) and above the 'Travel Readiness Results' block (i.e. above where the data is used).

Embedded data requires both a name (referred to as a 'field') and a value. Sometimes you might choose the field from the drop down menu, but in this case you need to create one. This could be the same name as the score (e.g. 'Travel Readiness'), or a variation of this, or something else entirely. Whatever you choose for the name, you will then need to set the value of this embedded data to be the 'Travel Readiness' score, by choosing 'Insert piped text', 'Scoring', 'Travel Readiness' and then 'Score'. It should look something like this:

The screenshot shows a survey editor interface with three main blocks:

- Show Block: Travel Readiness (1 Question)**: Includes buttons for 'Add Below', 'Move', 'Duplicate', and 'Delete'.
- Set Embedded Data:**: A central configuration area where the field name 'Travel Readiness' is set to the value  $\{gr://SC\_4UZYACMV5PlzAbQ/Score\}$ . It includes an 'Add a New Field' link and buttons for 'Add Below', 'Move', 'Duplicate', 'Add From Contacts', 'Options', and 'Delete'.
- Show Block: Travel Readiness Results (3 Questions)**: Includes buttons for 'Add Below', 'Move', 'Duplicate', and 'Delete'.



You can now make use of this embedded data in the display logic. For example, go to the response meant for the people who scored between 0 and 2, and add display logic by choosing 'Embedded Data', 'Travel Readiness' (or whatever name you gave to the embedded data) and then 'Is Less Than' and '3':

Display this Question only if the following condition is met:

Embedded Data ▾ Travel Readiness ▾ Is Less Than ▾ 3 ▾

Do the same thing for the remaining two questions - note that you will need to add two rows of display logic for the second question, indicating that the score needs to be both greater than 2 and less than 6 (or greater than or equal to 3, and less than or equal to 5).

Preview the survey to check that the display logic works as you intended.

## 5.2 Email triggers

With email triggers you can have emails sent to yourself, to the survey participant (by asking for their email address and then using piped text) or to any other address, either every time a survey is completed or when a certain condition is met. For example, you could add an email trigger to your *Test Survey* to send the participant their 'Travel Readiness' score (as calculated in Section 5.1) and/or any other relevant information.

To do this, first add a new question directly below the question(s) where you provided the participant with their score (this will either be in the 'Travel Readiness' or 'Travel Readiness Results' block, depending on whether you made use of display logic or not). This new question should ask the participant to enter their email address if they would like their results sent to them – you can add validation to it to ensure that an email address is entered, as detailed in Section 2.2, if desired.

Now go to 'Survey options' and to 'Post-Survey', then scroll down to 'Manage email triggers' and select 'Edit triggers'. At this point, you may want to start by specifying that the email trigger will only activate if the participant actually enters their email address. To do this, select 'Add a Condition' then choose the question where they are asked for their email, select it again and then finally select 'Is Not Empty'.

Next, note that the default 'To Email Address' in the email trigger will probably be your own, but that you should update it to send to the participant's email address instead. To do this, select the 'piped text' icon (the {A} icon) in the 'Message' section below. Choose 'Survey Question', then navigate to the question asking for the participant's email, and then choose the question again. Cut and paste the piped text that appears into the 'To Email Address Field', deleting your own email if required. You can then add a 'From Name' and 'Reply-To-Email' as well as a 'Subject', and finally you can type the message you would like to send. Note that you can make use of piped text again when doing this – for example, you can include the participant's score in the message in the same way as it was included in questions in Section 5.1 (i.e. click on the 'piped text' icon and select 'Scoring', 'Travel Readiness' and 'Score'). You can then choose to keep selected or deselect the 'Include Response Report' box (and, if selected, the 'Show Full Question Text' box), depending on whether you want the participant's survey responses to be included in the email.

Finally, if you want to take the next step of customising the email trigger according to the participant's score (or anything else), you need to add another condition which does this. For example, if you want the current message to only send to those who received a 'Travel Readiness' score between 0 and 2, click on the green circle with the plus sign to add another condition. Next change 'Question' to 'Embedded Data', type the name of the embedded data (e.g. 'Travel Readiness', as created in Section 5.1) and specify 'Is Less Than' and '3'. You can then customise the message that is sent to these participants, in the same way as you customised the different questions in Section 5.1. Select 'Save Triggers' to save the trigger, then select 'Edit Triggers' again and choose to 'Add Another Trigger' in order to repeat the process for different conditions



## 5.3 Quotas

Quotas allow you to count how many participants have met a certain condition or conditions in your survey, and to control what happens when the quota is met. For example, if the survey quota has already been filled you could end the survey for the participant, you could hide a question or a block or you could make use of branch logic, skip logic or display logic to customise what happens (for example, you could use display logic to hide a certain choice or choices for a question if the quota has been met).

You can also use a quota to limit the total number of people who take your survey. For example, you could use a quota to limit the number of people who take your *Test Survey* to 50. To do this go to 'Survey options' and to 'Quotas', then select 'Add A Quota'. At this point you have option of creating a 'Simple Logic Quota' (where you specify how many participants are allowed to meet the set condition or conditions) or a 'Cross Logic Quota' (where you specify what percentage of participants are allowed to meet the set condition or conditions). Choose 'Simple Logic Quota', then adjust the quota from 100 to 50 by changing the value in the box on the left, and rename the quota from 'New Quota' to something more descriptive (for example, 'Response Limit').

Next you need to set a condition for when the quota will be incremented – this can be based on answers to survey questions, embedded data or other quotas. In this instance you want every survey participant to be counted as part of the quota, so keep 'Question' selected and choose a question in your survey that everyone will see – for example the first question with the survey introduction. Click 'Select Choice' and choose the question again, then keep 'Is Displayed' selected. Finally, choose what you want to happen when the quota has been met. In this case the best choice is to 'Prevent All New Survey Sessions', and you can then choose to show a custom inactive survey message (you can create this in a similar way to an end of survey message, as described in Section 2.6). You then also have the choice to 'Keep & record' or 'Delete' over quota options (which in this instance would only be relevant in the event that two people submitted their survey at exactly the same time).

To test that your quota works in the way you expect, you can increase the quota to the maximum value by selecting 'Set Count' underneath the quota box on the left, ensuring that 50 is entered and selecting 'OK'. Press 'Save' and then preview your survey – you should see your inactive survey message displayed. Once you have checked it is working correctly, go back into 'Quotas' and press 'Reset' to set the count back to 0.

For details on all the different ways you can use quotas, see: <https://www.qualtrics.com/support/survey-platform/survey-module/survey-tools/quotas/#LimitingTotalSurveyResponses>

## 6. Publishing, distributing and analysing a survey

Once you have added all the elements to your survey and adjusted the look and feel as required, preview it again to check that it works and looks as expected. You may also like to make use of the Qualtrics 'iQ Score' at this point, or at any time. The 'iQ Score' provides an 'Expert Review' of your survey and suggestions for improvement (including for making your survey more accessible to users), and can be viewed by clicking on 'iQ Score' at the top right of your survey (below the 'Preview' and 'Publish' buttons).

After you have made any necessary changes to your survey and are ready to publish, select 'Publish' and then 'Publish' again in the pop-up window that appears. You will then be provided with an 'anonymous link' that you can use to distribute your survey. Furthermore, you can find many other ways of sharing your survey in the 'Distributions' section of Qualtrics. These different distribution methods are listed below (for details of a particular method, click on the relevant link):

- [Anonymous link](#)
- [Emails](#)
- [Personal links](#)
- [Social media](#)
- [Offline app](#)
- [QR codes](#)



Additionally, if you know who you want to send your survey to ahead of time, you can create a contact list to distribute your survey invitations. This list (which should include participants' names, email addresses and any other relevant information) can be created either manually or by importing contact details. While you don't have to set up a contact list, it can help make your survey distribution easier, and it also allows for information to be added to a participant's responses as embedded data. For information on setting up a contact list, see:

<https://www.qualtrics.com/support/survey-platform/contacts/contact-list-overview/#CommonUses>

Once you have distributed your survey and have received all your responses, you will need to turn your attention to analysing your data. While this isn't covered in any detail here, note that you can either analyse your data in Qualtrics, or export it to another program for analysis (which is usually required for in-depth analysis). To export your data, go to the 'Data & Analysis' tab, select 'Export & Import', choose 'Export...' and then select your preferred file format.