Creating a Basic Qualtrics Form

Complexity Level: Beginner

This is a beginner topic. Little to no advanced knowledge is required.

Permission Level
Level 1 or Higher - See permission level document for details

Qualtrics can be used to create surveys as well as forms for general data collection.

If you prefer video walk through instead of step by step instructions, this video covers all the basics of setting up your first Qualtrics form. This is a 3rd party video but we think it's a great tutorial.

Step-by-Step Guide

Step 1: Login to Qualtrics
Step 2: Create a Project (form)
Step 3: Add Fields to Your Survey Project (form)
Step 4: Preview Your Survey Project (form)
Step 5: Publish Your Survey Project (form)
Related Articles

Step 1: Login to Qualtrics

If you setup a Qualtrics form through UGA (and not Qualtrics) you can login at http://ugeorgia.qualtrics.com

Your username is probably your UGA E-mail Address or your myID version of your e-mail address. Your password was setup by you when your account was created.

If you can't remember your password you can request a password reset by visiting the login page and clicking "Forgot Password."

If you do not have a Qualtrics account, please submit a helpdesk request for an account at http://helpdesk.franklin.uga.edu or by emailing helpdesk@franklin.uga.edu.

Step 2: Create a Project (form)

Click the green "+" symbol (see below)

Next Click "Blank Survey Project" (see below)
Give your form or survey a name and click the green "Create Project" button (see below)

Step 3: Add Fields to Your Survey Project (form)

After you create your project you will see a new form with one question pre-created (see below). We can change the type of question by clicking on the green button to the right that is preselected as multiple choice.

Let's make the first field a text entry question so we can ask the user their name. First click on the green multiple choice button and other field types are revealed. Then click the "text entry" option.

Now we have to decide what kind of text entry we want to use. Because we are asking the user to provide their name, let's leave it as "Single Line" but you can see there are other options.
Click on the label for the question that says "Click to write the question text" and change that to say "Your Name" or something similar. Then click the green "Create New Question" button to add another question.

Follow the same process for each field. Decide what kind of field you need, change to that field type, change your label, etc. In this example I will create a field for e-mail address and a field for the user to provide a comment.

**Step 4: Preview Your Survey Project (form)**

If you have added all of the questions you want on your form, you can go ahead and preview the form to make sure it looks like you want. Click the blue "Preview" button.

You can see the form as it will appear in a web browser and a phone (see below). Click the blue "Close Preview" button to go back to the editor.

**Step 5: Publish Your Survey Project (form)**

In order to use the form you have created, we have to publish it so that there is a link to provide to users who will fill out the form.

Click the green "Publish" button (see below)
You will see the Expert Review screen which will provide you with a score that tells you whether your form has an obvious problems. This simple form will have a great score with no recommendations for improvements because it is so simple.

Click the green "publish" button. See below.

You will then be presented with a URL to your published form. This is the link that you can distribute through email and even embed in your web site. Please see our documentation for embedding qualtrics forms. See below.

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