

## SRU Qualtrics Guides:

### 3. Survey Design Basics – The Look & Feel Menu

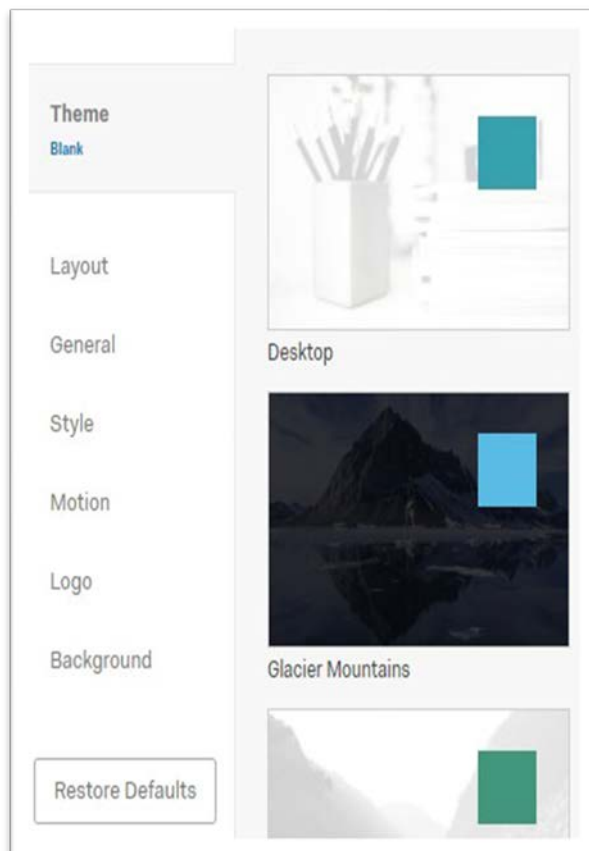
sru.qualtrics.com

Last Updated: 8/19/21

1. Once you log in to Qualtrics, from the main **Home** screen, click on your survey. In the upper left-hand corner, click on the paint roller icon to access the **Look & Feel** menu.



2. There are many further options to customize your survey in the **Look & Feel Menu**.



**Theme** – Changes the overall appearance of the survey.

**Layout** – Changes the style and design of the questions.

**General** – Adjusts the settings of the survey, like questions per page or the ability to show a progress bar.

**Style** – Adjusts the color and font of the survey.

**Motion** – Add animation, for example, if you want each question to fade in.

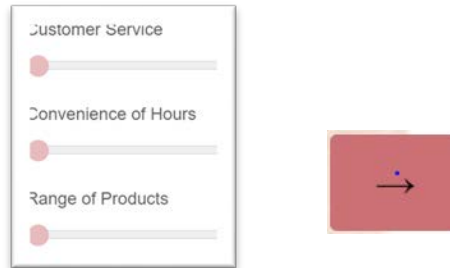
**Logo** – Lets you add your own logo to the survey.

**Background** – Change the color of the background or insert an image.

### 3. Theme

- a. **Dynamic Themes** will be displayed. Click on the theme you are interested in. The preview of the new theme will appear at the right.

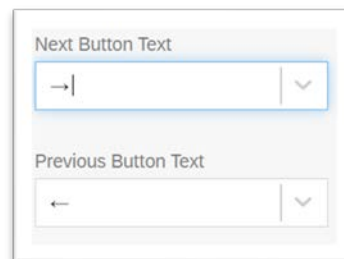
The theme will change the color of the sliders and **Next** button in the sample survey. Here is how it appears in the cherry tree theme:



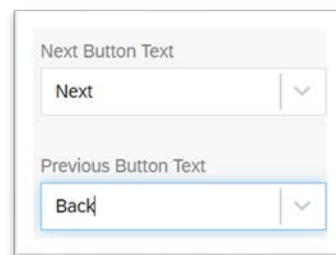
4. **Layout** - From here you can click to select either **Flat**, **Modern**, or **Classic** which will display the survey questions in a default font style.

### 5. General

- a. **Next/Previous Button Text** – By default this is set as an arrow. If you click in the box and delete the arrow you can type in text.



Can become...



And will appear as this in the survey:



- b. **Progress Bar/Progress Bar Position** - Click on the **Progress Bar** drop-down to have the option of a progress bar to let the respondents keep track of their progress:

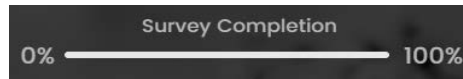
- a. With Text



- b. Without Text



- c. With Verbose Text



- Note: A progress bar will not show in your survey if **None** is selected.

Clicking on the **Progress Bar Position** drop-down will give you the option of having the progress bar either at the top or bottom of the survey.

- c. **Questions per page** – Click in the text box and type the number of questions that will appear per page in the survey.

A text input field with a light blue border. The text "Questions Per Page" is at the top. The number "2" is entered in the field.

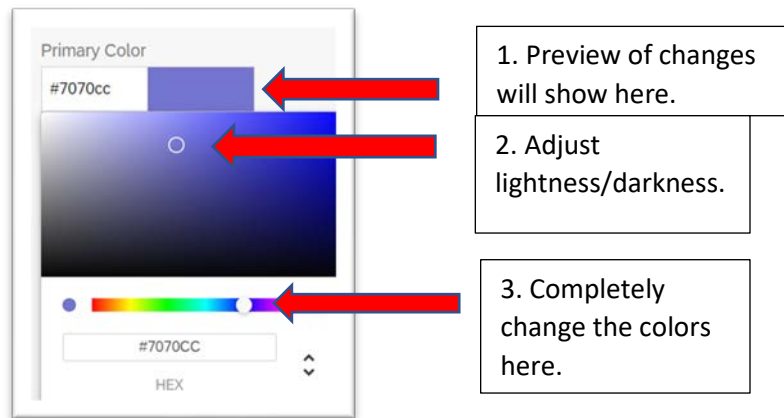
- d. **Header/Footer** – Click in the text box and enter additional text you would like to appear at the top or bottom of the survey.

A settings panel for the survey footer. It has a title "Footer" and a text input field containing "Thank you!". Below the input field is a blue "edit" link. To the right of the input field is a dropdown arrow. To the right of the entire panel is a dark grey preview box containing the text "Thank you!".

## 6. **Style**

- a. Click on the **Primary Color** box. You can use your mouse to move the white circle and adjust the lightness/darkness of the color.

You can use your mouse to adjust the white circle on the bottom scale to completely change the color.



- Note: The above instructions can also be applied to the **Secondary Color**. **Primary Color** will affect the colors of features like the progress bar and question highlights. **Secondary Color** will make changes to minor elements of your survey, such as the next and back buttons.
- b. **Font** - From the drop-down you can select Default, Arial, Georgia, Helvetica, Tahoma, Times New Roman, and Verdana.
- c. **Foreground Contrast** - From the drop-down you can select low, medium, or high contrast to make your text stand out.

Low

Thank you!

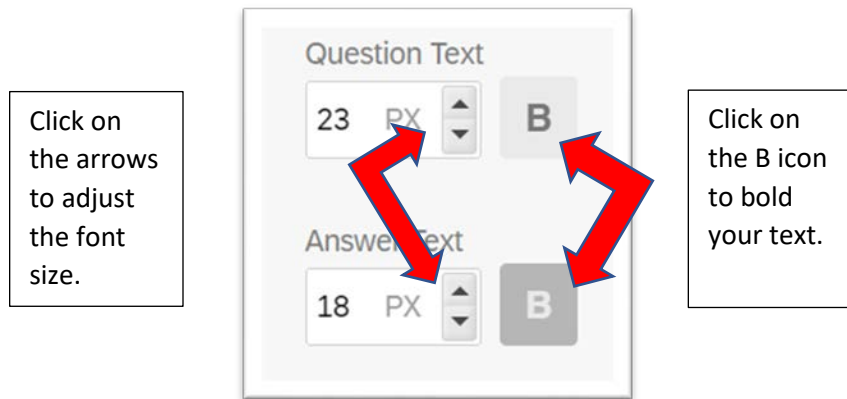
Medium

Thank you!

High

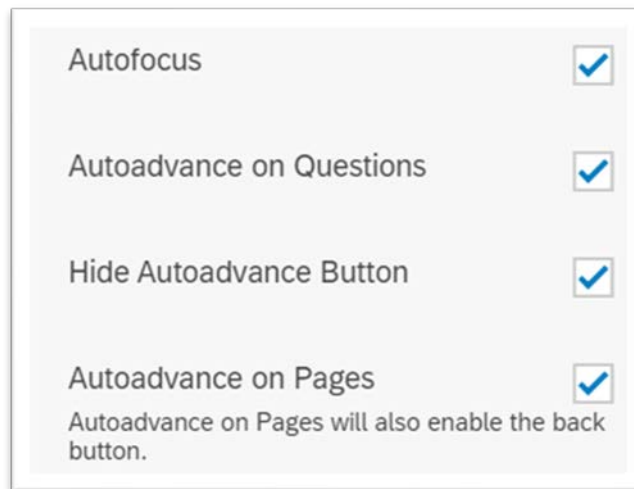
Thank you!

- d. **Question Spacing** - From the drop-down you can choose from extended, comfortable, and compact to determine the amount of space between your survey questions.
- e. **Question/Answer Text** - Click on the up and down arrows to adjust the font size of your question or answer text. Clicking on the **B icon** will bold either your survey question or answer choices.



## 7. Motion

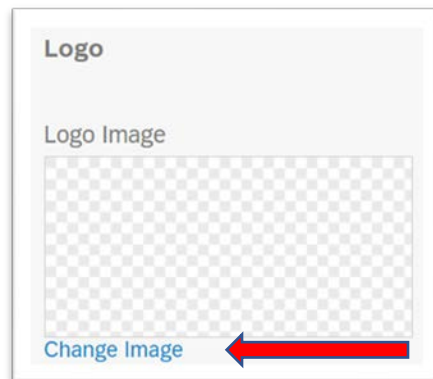
- a. **Page Transition** - This will animate your survey pages from one to the next. From the drop-down you have the option of **None**, **Slide**, **Fade**, or **Flip**. Click on the check boxes to select additional options.



- b. **Autofocus:** Will only focus on the current question the respondent is answering, making for fewer distractions while completing the survey.

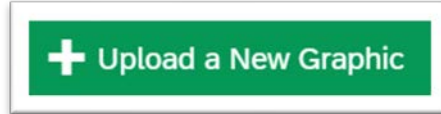
- c. **Autoadvance on Questions:** Lets the respondent advance through questions without scrolling and allows them to automatically advance to the next question after answering.
  - Note: A **Done** button will appear after certain questions.
- d. **Hide Autoadvance Button:** This option will hide the done button that appears when autoadvance on questions is enabled.
- e. **Autoadvance on Pages:** This option lets respondents advance past pages without clicking the next button. Instead they will go to the next page automatically as soon as they select an answer to the last question on the current page.

8. **Logo** - To add a logo to your survey, click **change image** (shown here in blue text).

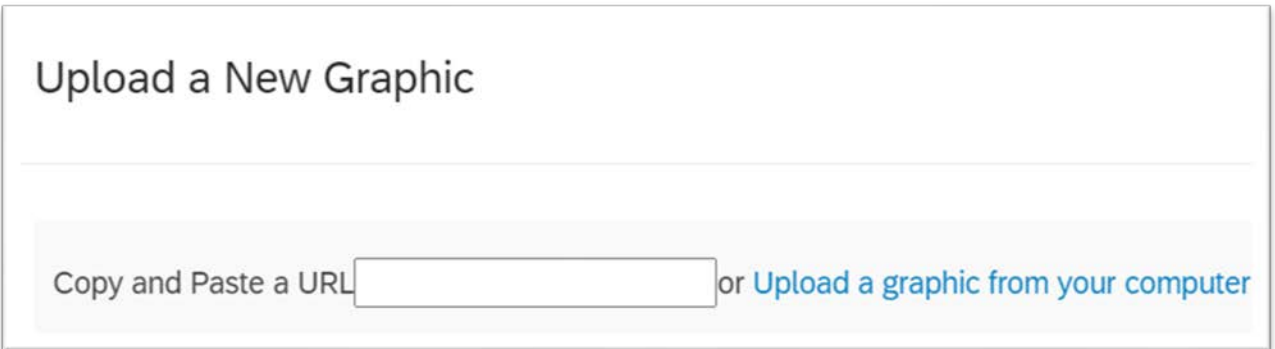
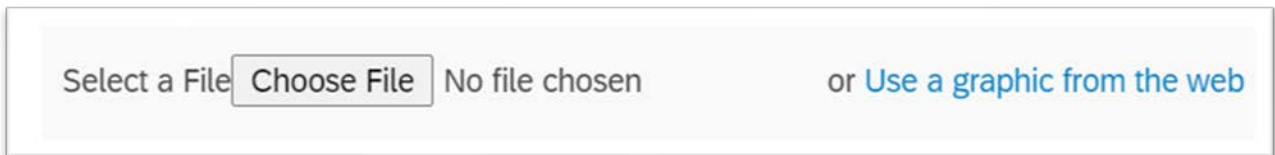


- Note: You can upload JPG (or JPEG), PNG, and GIF files that are 16 MB or smaller. For the best experience, PNG files are recommended.

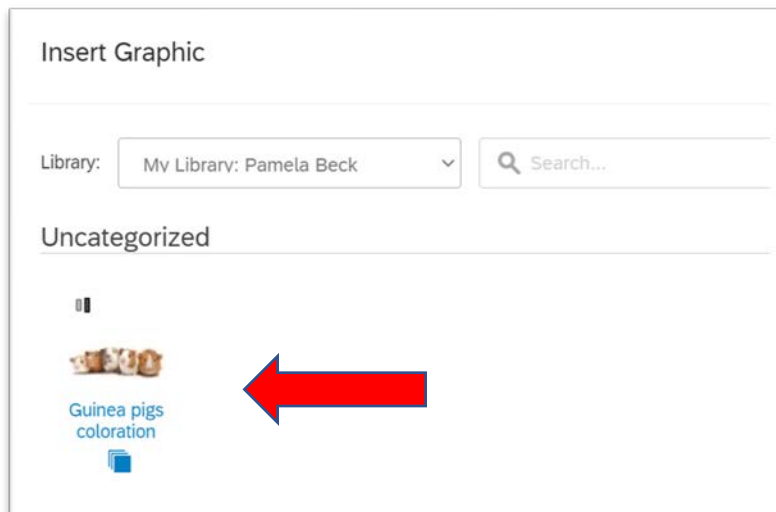
On the right-hand side of the screen click on the green **Upload a New Graphic** button.



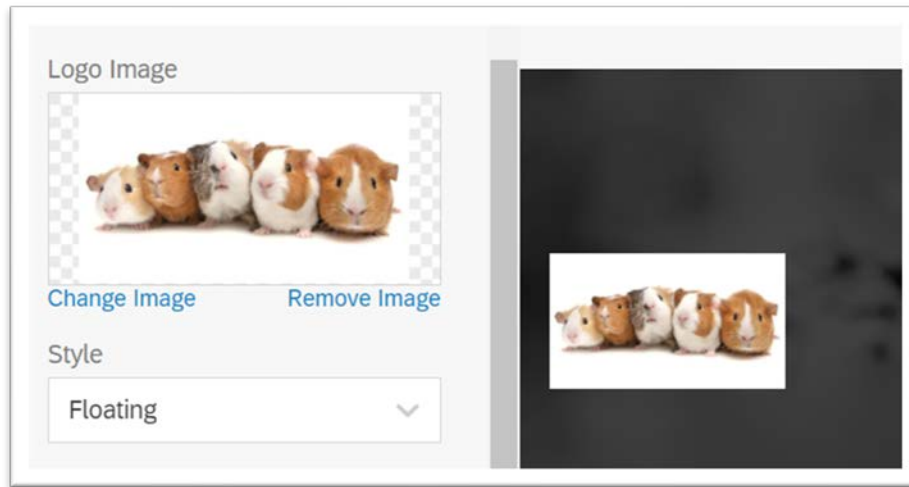
Click on the **Choose File** button to pick an image from your computer. Clicking on **Use a Graphic From the Web** (shown here in blue), will prompt you to copy and paste a URL. Click **Save** once finished.



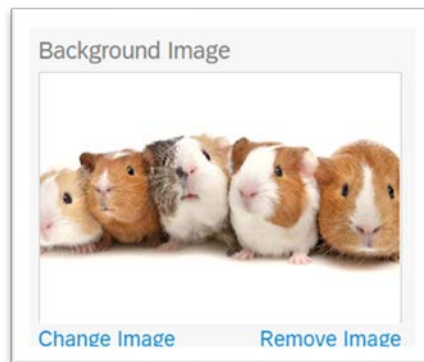
If you already have an image uploaded, click on the image you want to use.



You will be taken back to the main logo menu. Your image will appear both in the survey preview and under **Logo Image**.



- a. **Style and Placement** - The **Style** drop-down menu will give you the option of **Floating** or **Banner style**.
  - b. The **Placement** drop-down menu will give you the option to move your logo to the **Left**, **Center**, or **Right**.
9. **Background** - The **Background Type** drop-down will give you the option of using a solid color or photo background.

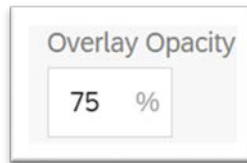


You can change or remove your image by clicking on the corresponding blue text.

- a. **Overlay Color** will give you the drop-down option of **None**, **Dark**, or **Light** for your background image.

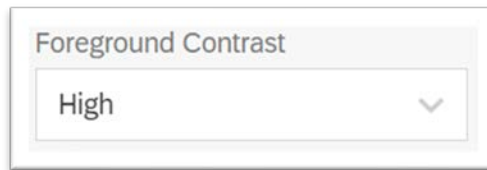


- b. **Overlay Opacity** can be adjusted by typing a number in the percentage box (the default is 75). This will adjust how transparent your background image is.



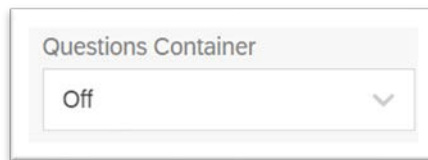
A screenshot of a control labeled "Overlay Opacity". It features a text input field containing the value "75" followed by a percentage symbol "%".

- c. **Foreground Contrast** - From the drop-down you can select **Low**, **Medium**, or **High** contrast to make your text stand out.



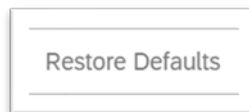
A screenshot of a control labeled "Foreground Contrast". It is a drop-down menu with "High" selected and a downward arrow on the right.

- d. **Questions Container** – From the drop-down you can select **On** or **Off**. On will add a large white box around the questions in the survey.



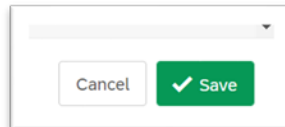
A screenshot of a control labeled "Questions Container". It is a drop-down menu with "Off" selected and a downward arrow on the right.

The **Restore Defaults** button will reset all of the style choices you have made in your survey.

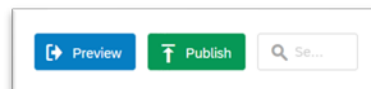


A rectangular button with the text "Restore Defaults" centered inside.

10. Be sure to periodically hit the green **Save** button in the lower right-hand side of the screen while making edits in **Look & Feel**. You'll also need to **Publish** your changes once you return back to the main screen of the survey.

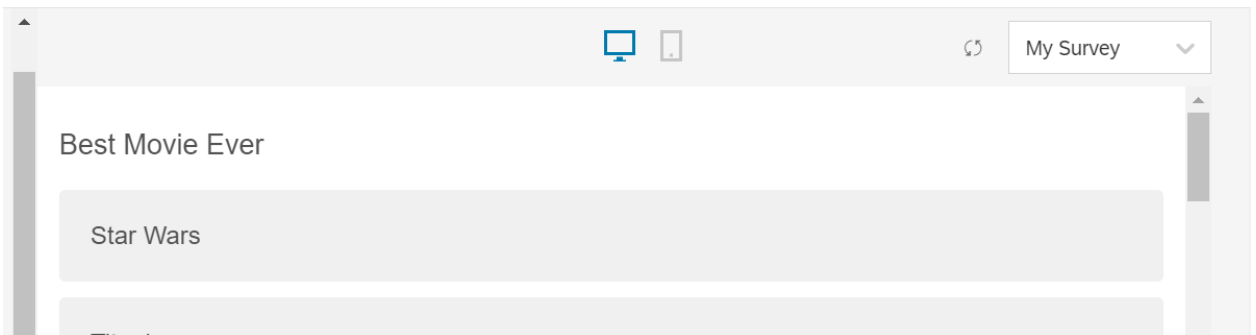
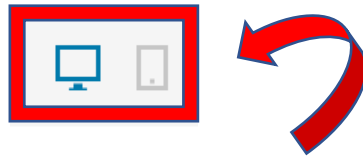


A screenshot showing two buttons: a white "Cancel" button and a green "Save" button with a white checkmark icon.



A screenshot showing three buttons: a blue "Preview" button with a magnifying glass icon, a green "Publish" button with a document icon, and a white search input field with a magnifying glass icon and the text "Se...".

The **Computer and Phone Icon** at the top of the preview screen allows you to toggle between a preview of how the survey will look to respondents on a computer or smart phone.



An example of the desktop and mobile previews are shown below:



### Additional Resources:

<https://www.sru.edu/offices/planning-resource-management-and-assessment/services> - PRMA page with additional Qualtrics guides – Under the **Survey Requests** accordion/**Qualtrics Self-Help**

<https://www.qualtrics.com/support/survey-platform/getting-started/survey-platform-overview/> - Qualtrics Training Manual - Main

<https://www.qualtrics.com/support/survey-platform/survey-module/look-feel/look-feel-overview/> - Qualtrics Training Manual – Look and Feel Overview