

The **“ANR Templates” library** now houses surveys developed by ANR staff and academics- you can copy the survey to your own library, then edit/revise/add from there. Feel free to [create your own folders](#) in the library and [copy your surveys](#), blocks of questions, graphics, and more for shared use with your colleagues.

Step 1 – Scan the library for the template you want to copy!

Step 1A - Go to the Library by clicking on the Global Navigation icon, then selecting Library. The icons are highlighted in yellow below.

The screenshot shows the XM Projects interface. On the left, a Global Navigation menu is open, displaying several options: Home, Projects, Catalog, Workflows, Contacts, Library, and Admin. The 'Library' option is highlighted with a yellow circle. Above the menu, the XM logo and a hamburger menu icon are visible, with the word 'Projects' next to them. The main content area on the right shows a list of projects. At the top of this area, there is a message: 'You are currently previewing the new Home and Projects page experience. [Switch back](#) or [Leave Feedback](#)'. Below this, there is a search bar with the text 'Search in' and a button labeled 'All Projects & Programs'. There are also two dropdown menus: 'Project Types' and 'All Statuses'. The project list has columns for 'Project name', 'Status', 'Responses', and 'Type'. Two projects are listed: 'ANR Template - Blue BG, Yellow Button' and 'Test embedding_Website Suggestion Box template'. Both have a status of 'Active'. At the bottom of the page, there is a footer with 'FTE 11', 'PPE Trainings 33', and 'Project Board 27'. On the right side of the footer, there is a pagination control showing '< 1 of 1 >'.

Project name	Status	Responses	Type
ANR Template - Blue BG, Yellow Button	Active	5	Survey
Test embedding_Website Suggestion Box template	Active	0	Survey

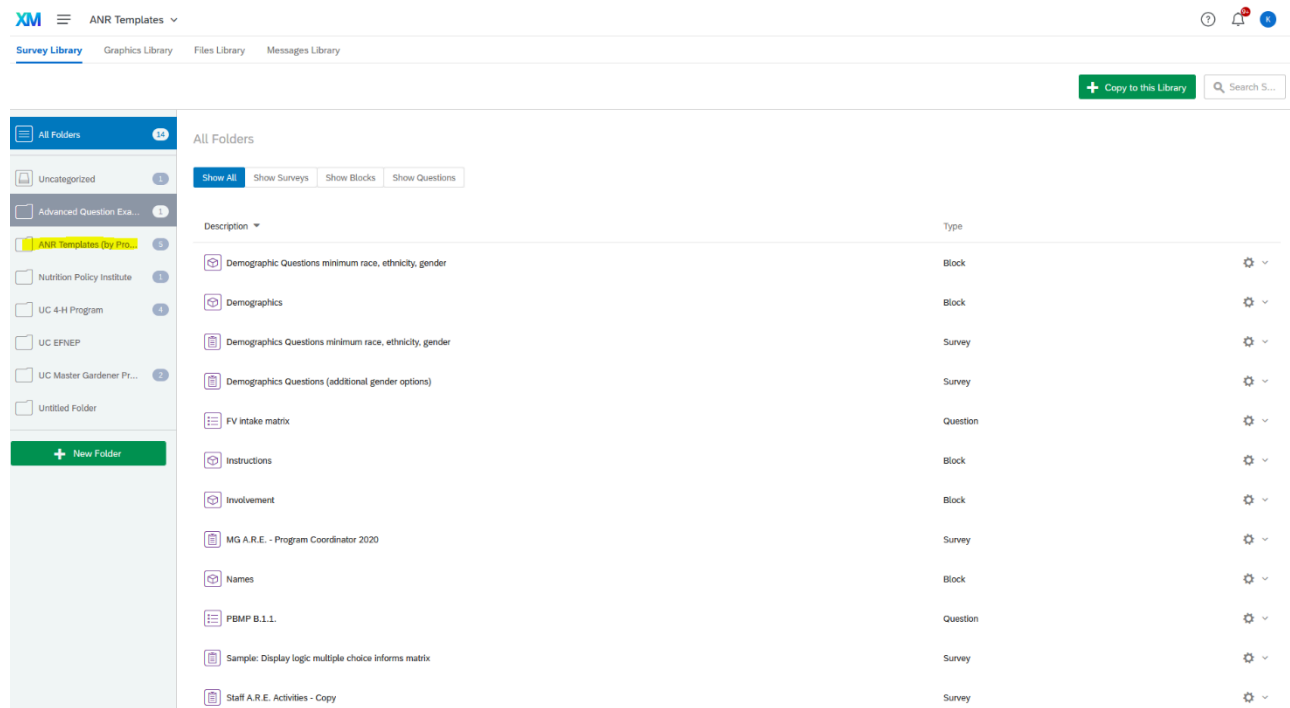
Step 1B – Select the ANR Templates library. First click on the down arrow.

The screenshot shows the Qualtrics Survey Library interface. On the left sidebar, the 'ANR Templates' library is highlighted in yellow. The main area displays a list of survey templates, all of which are 'Survey' type. The list includes:

Description	Type	Settings
2018 Measuring Outcomes - Survey Results	Survey	⚙️
2018 Measuring Outcomes - Survey Results	Survey	⚙️
ANR Template - Blue BGL Yellow Buttons	Survey	⚙️
Demographics Questions (additional gender options)	Survey	⚙️
Sample: Display logic multiple choice informs matrix	Survey	⚙️
UC ANR Template for End-of-Session Training Evaluations	Survey	⚙️
UC ANR Template for End-of-Session Training Evaluations	Survey	⚙️
UC ANR Template for End-of-Session Training Evaluations	Survey	⚙️

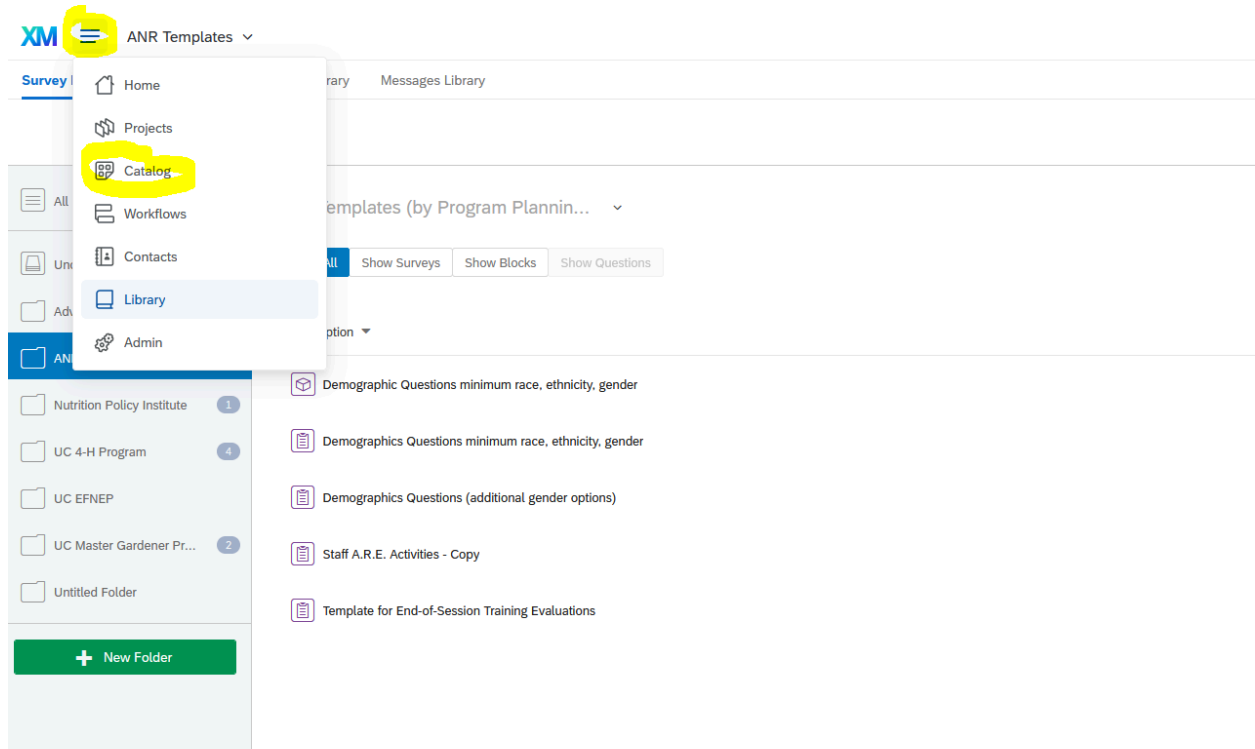
At the bottom of the page, there are links for 'Qualtrics.com', 'Contact information', and 'Legal'.

Example: If you are looking for UC ANR Program Planning & Evaluations End-of-Session Evaluation Template, select ANR Templates on the left.



Step 2 – Create a new survey using the template in the library.

Step 2A - Click the Global Navigation icon on the top-left, then select Catalog. The icons are highlighted in yellow below.



STEP 2B – Under “Projects from scratch,” click on the Survey icon, circled in yellow below. Then, a window on the right will appear and you can click “Get started.”

The screenshot displays the 'Create a project or workflow' interface. At the top, there is a search bar labeled 'Search the catalog'. Below it, a row of tabs includes 'All', 'CoreXM & DesignXM', 'CustomerXM', 'ProductXM', and 'BrandXM'. The 'All' tab is selected.

Under the heading 'Projects from scratch', a 'Survey' icon (a document with a checklist) is circled in yellow. Below this, the 'Guided projects' section is visible, featuring a grid of project cards. The first row includes 'Customer Satisfaction (CSAT)', 'Relationship NPS', 'Touchpoint NPS (Transactional NPS)', and 'Transactional Customer Effort Score (CES)'. The second row includes 'Event Feedback', 'Training Feedback', 'Team Event Feedback', and 'Manager Feedback'. The third row shows icons for a flag, a document, a speech bubble, and a document with a checklist.

On the right side, a sidebar titled 'Project' is open. It contains the following sections:

- Survey**: Begin a survey from scratch or get started with a previous file.
- Best used for**:
 - Creating ad-hoc surveys
- What's included**:
 - Blank survey
- Related links**:
 - [Learn how to create a survey](#)

At the bottom of the sidebar, a blue button labeled 'Get started' is circled in yellow.

Step 2C – VERY IMPORTANT. Where it says “Create a blank survey project,” click on the down arrow and select “Use a survey from your library.” Give your survey a name and location, which you can easily change later.

Create a new project

Survey

Name

Type in a name

Folder

All Projects and Programs



How do you want to start your survey?

Create a blank survey project



Create project

Cancel

Step 2D – Click on the dropdown menu for Library and select “ANR Templates.” Then click on the dropdown menu for Survey and select the Folder and name of the survey you took note of in step 1C. Lastly, click on “Create project.”

Create a new project

Survey

Name

Type in a name

Folder

All Projects and Programs



How do you want to start your survey?


Use a survey from your library



Library

Select a library



 Please fill out this field

Survey

Select a survey



Create project

Cancel

Step 3 – Modify and publish your survey!

Tips:

- You modify the text of a question or response option by clicking directly onto the text on the screen. For example, click on “Please answer...” highlighted below to edit the instructions. Qualtrics auto-saves as you work.
- Click on the Publish icon, circled in yellow below, when you are ready to make your survey “live.” A popup will appear with your anonymous survey link and you can always retrieve that link again later in the Distributions section of each survey.
- Remember to always pilot test your survey. If you need to make edits, follow these same tips!
- If you need more assistance with Qualtrics, a good place to start is their trainings: Visit Qualtrics’ [basecamp training webpage](#), which offers six new user training modules (93 minutes) for developing, distributing, and analyzing surveys. [Research Core help site](#) has a detailed overview with written instructions, screenshots, keyword searches, etc.
- You can also check out UC ANR Program Planning & Evaluation’s [Extension Evaluation Resources](#) webpage, specifically the sub-pages on [Writing Good Questions](#) and [Surveys](#), for training materials and examples.

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e in a name IQ Score: Fair

Default Question Block

☐ Q1 ...

Please answer the following questions about [insert training name] on [date]. Your feedback is important to us and will help to [insert appropriate reason for survey].
Examples include: improve future trainings, demonstrate the effectiveness of this training, etc.]

Q2 iQ

Rate your understanding of the following topics now at the end of the training.

	Not at all	Slight	Moderate	Comprehensive
[insert training learning objectives]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[insert how to do recommended strategy]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Click to write Statement 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q3 iQ

Think back to before the training and rate your understanding of the following topics then.

	Not at all	Slight	Moderate	Comprehensive
[insert same items as above]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[insert same items as above]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Click to write Statement 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>