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.

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

Step 1C. Scan through the templates and take note of the survey name and the name of the folder it lives in, if applicable. This will come in handy in Step 2D.

Example: If you are looking for UC ANR Program Planning & Evaluations End-of-Session Evaluation Tempate, select ANR Templates on the left.
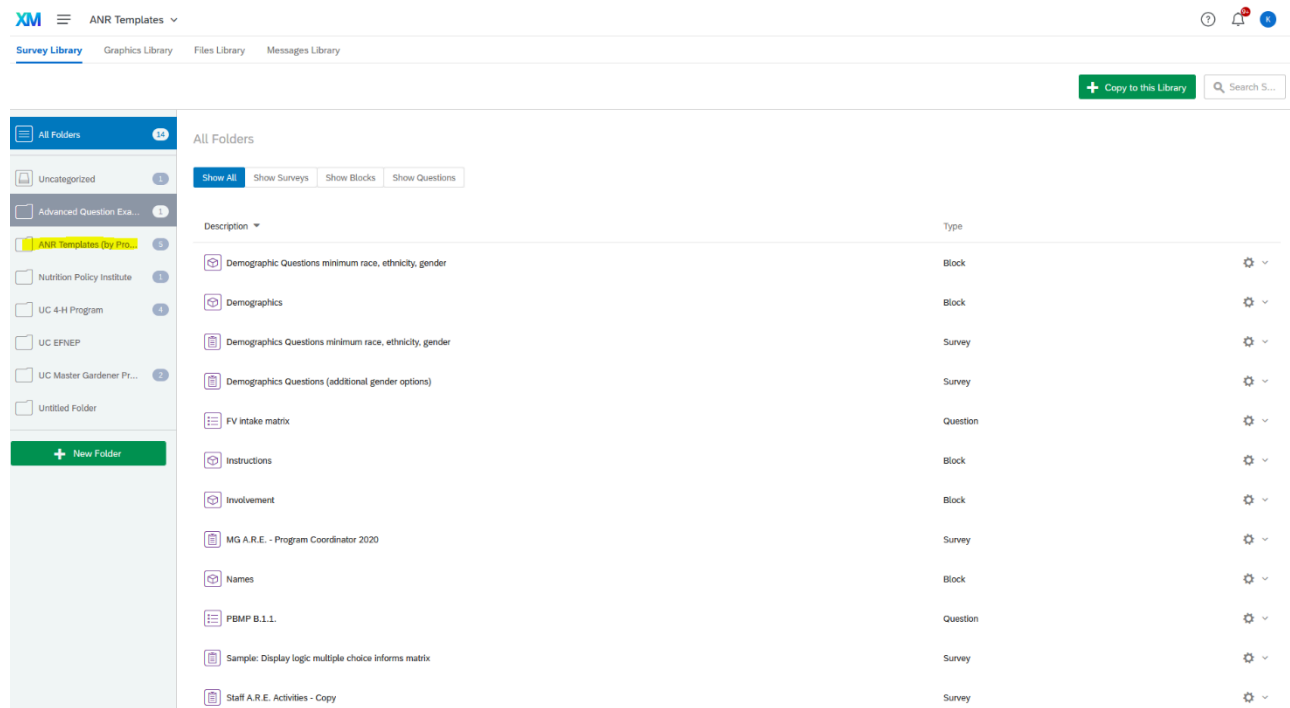
Step 2 – Create a new survey using the template in the library.

Step 2A - Click the Global Navigation icon on the top-left, then select Catalog. The icons are highlighted in yellow below.
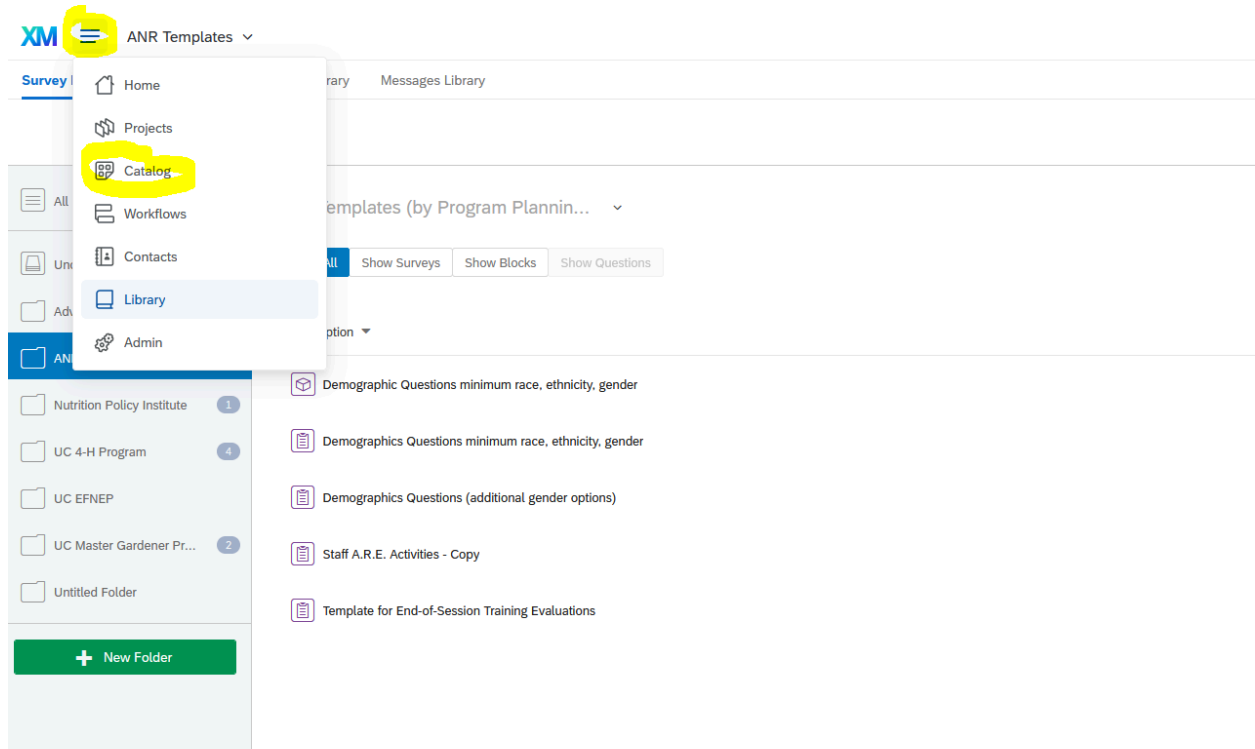
STEP 2B – Under "Projects from scratch," click on the Survey icon, circled in yellow below. Then, a window on the right will appear and you can click "Get started."

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.