Introduction to Qualtrics

INDIANA.INTENSITVE.DIDACTIC.SEMINAR.04.05.2014

SCREENSHOTS FROM QUALTRICS UNIVERSITY

Slides are available at mypage.iu.edu/~longdoan/iids2014

Q-tip! GO AHEAD AND DOWNLOAD TO FOLLOW ALONG.

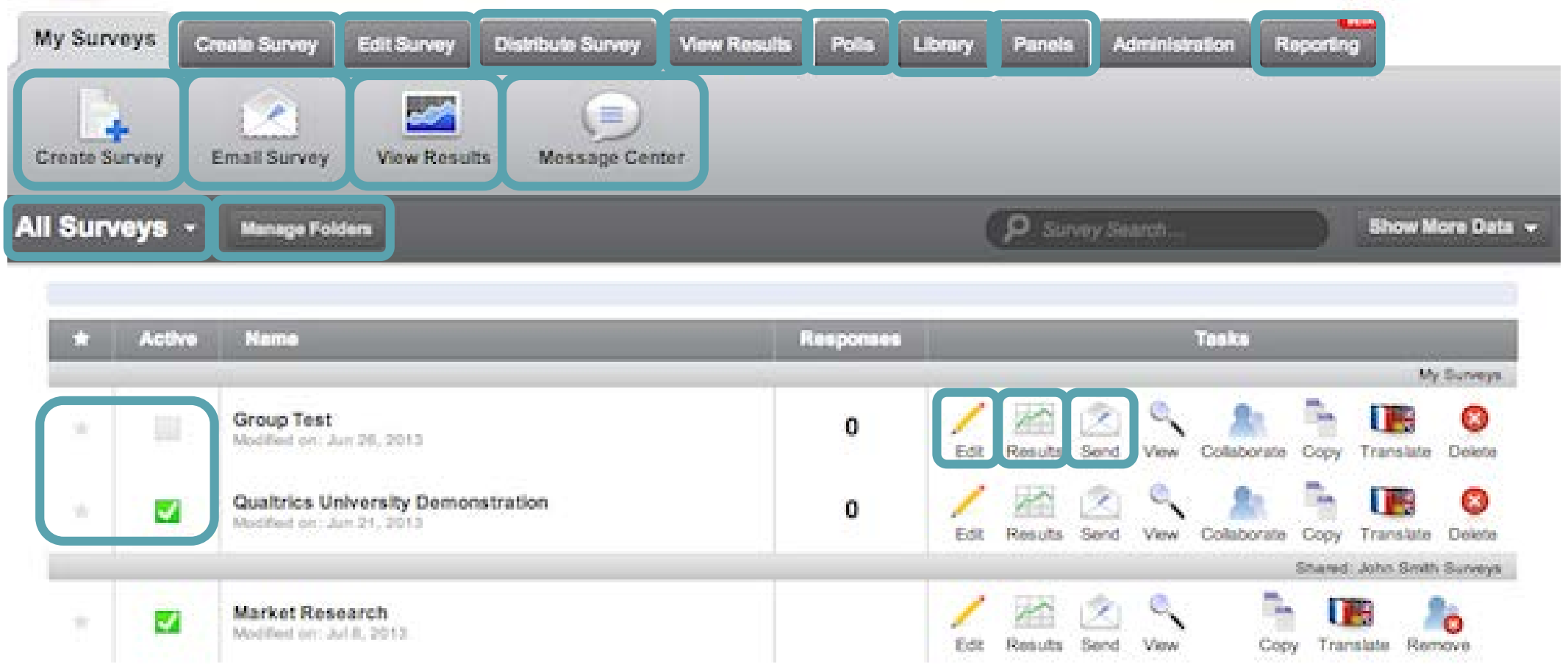
Agenda

- Getting a Qualtrics account
- Navigating Qualtrics
- Creating your first survey
  - Adding, deleting, and copying questions
  - Question types
  - Formatting questions and choices
  - Validation
  - Piped text
  - Display and skip logics
- Basic survey flow
- Look and feel, options
- Collecting and accessing data
- Tips, tricks, Q&A
- Advanced topics (time- and interest-permitting)
  - Randomization
  - Customized code
  - Advanced survey flow
- Where to learn more

Getting a Qualtrics account

- E-mail Kevin Wilhite (kwilhite@indiana.edu)
- Info needed
  - Your name
  - Preferred username
- Kevin will create an account and have you call him for your password
- Q-tip! The password is
  - You should change this password

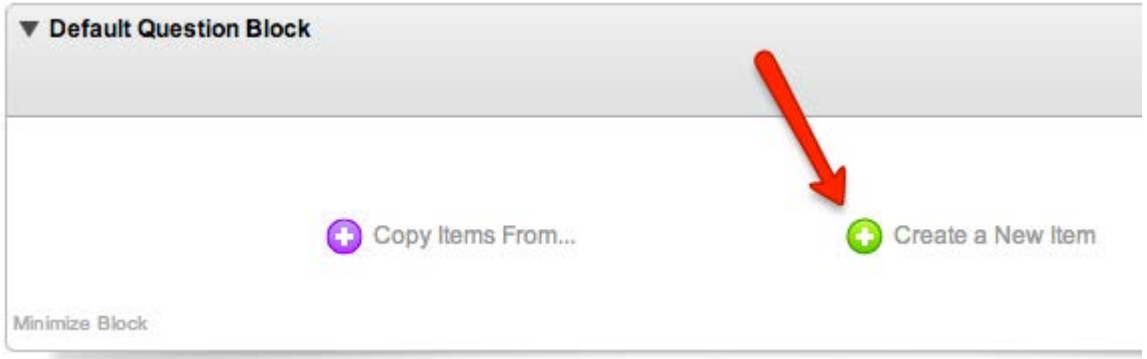
Navigating Qualtrics

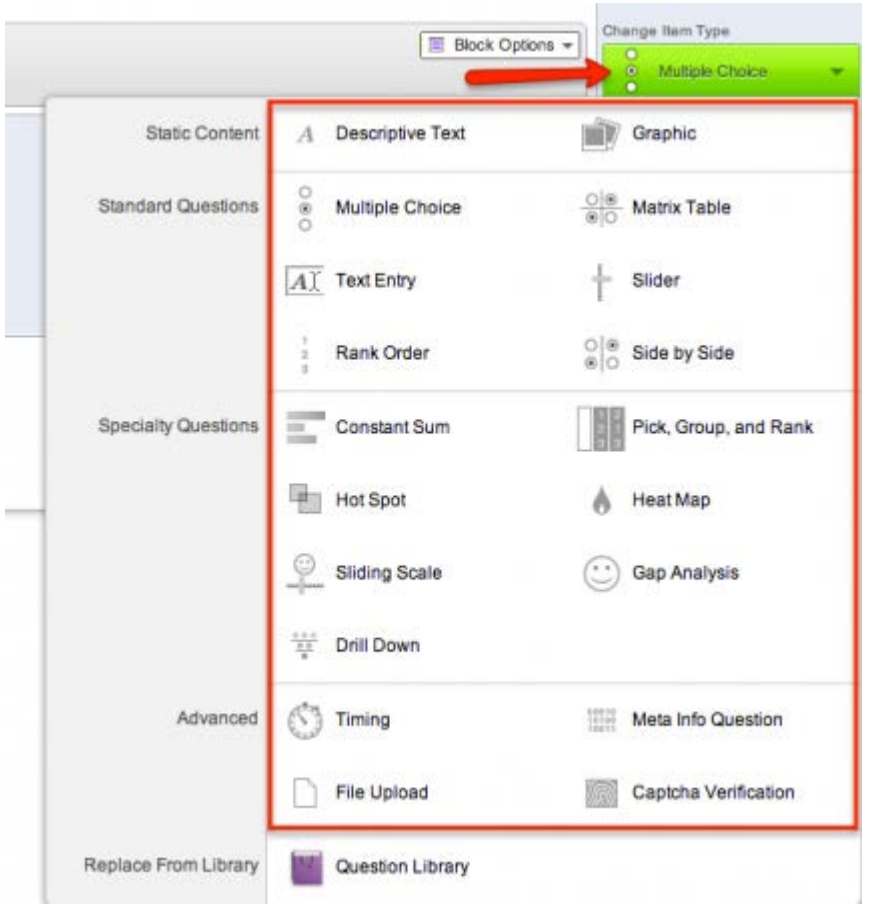


Creating your first survey

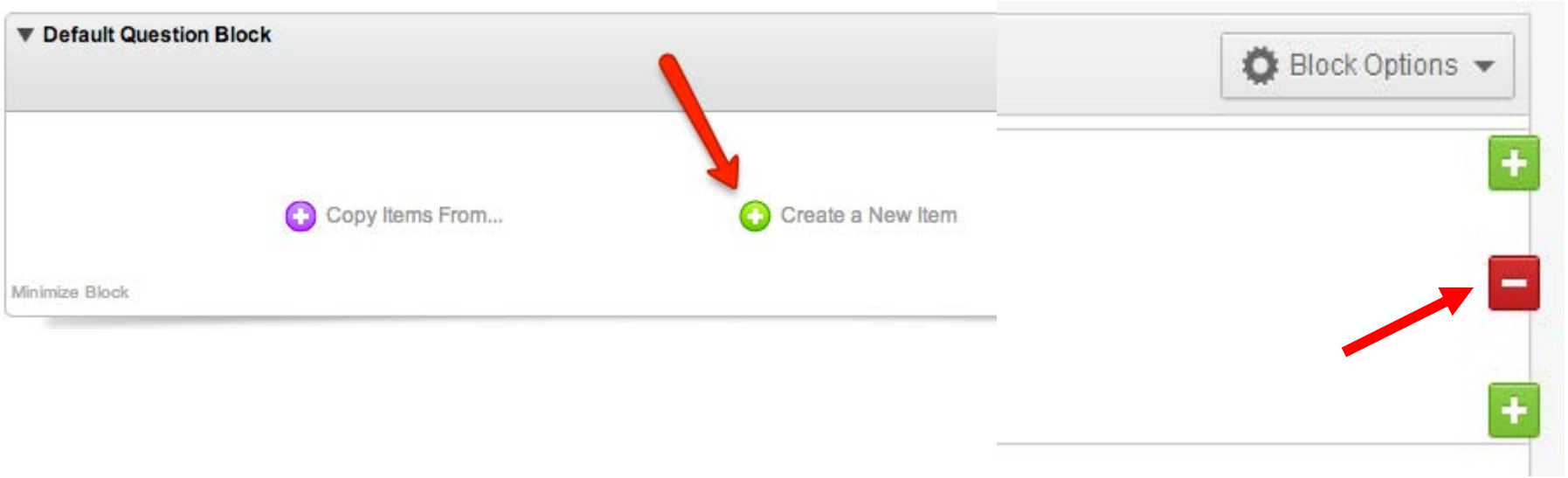
Q-tip! GOOD TIME TO ASK ANY QUESTIONS YOU MAY HAVE SO FAR.

Adding, deleting, and copying questions





Adding, deleting, and copying questions



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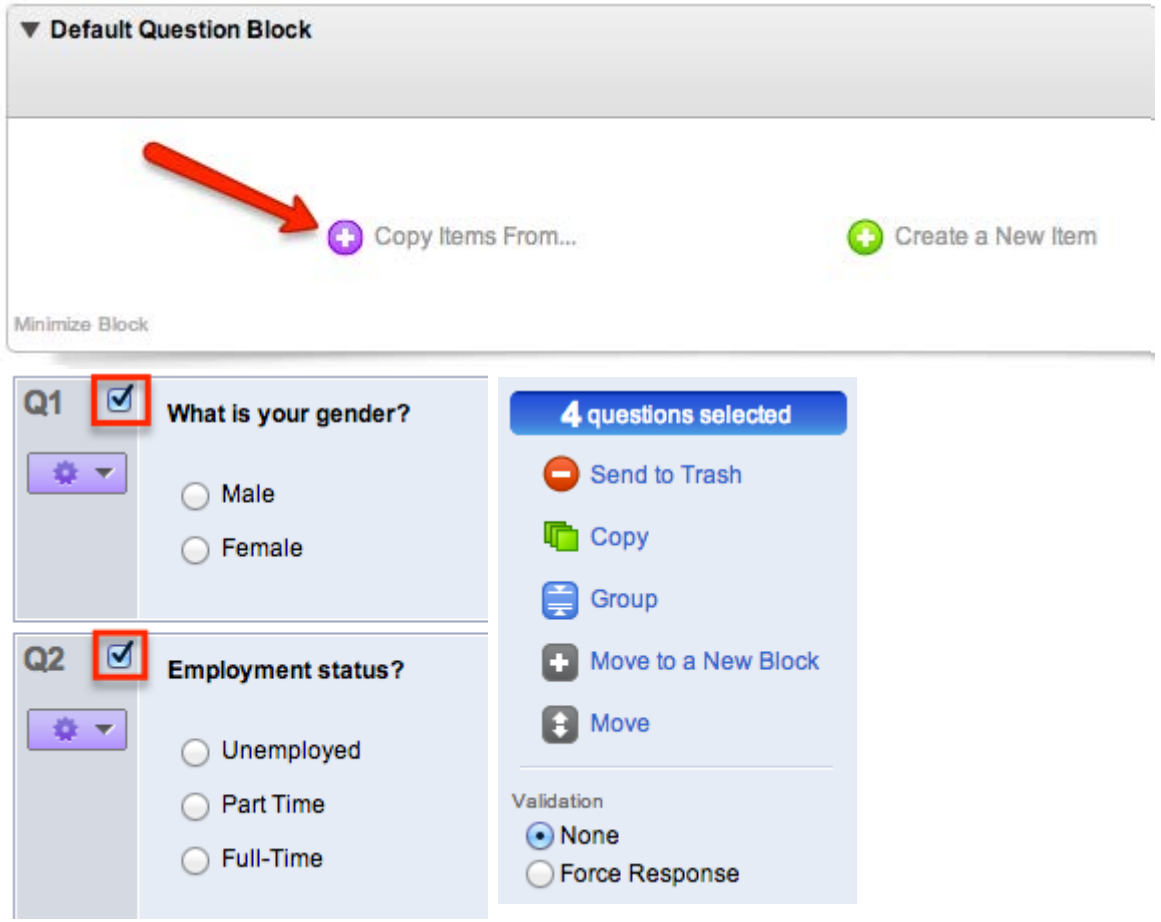


Question types

Q-tip! MAKE SURE YOU PLAY WITH IT! THE DEFAULT OPTIONS ARE NOT NECESSARILY THE BEST OPTIONS.

Standard types

- Descriptive text and graphic
  - Useful for instructions
  - Full HTML compatibility
- Multiple choice
  - Default question type
  - Respondents likely familiar
  - Common “Automatic choices”
- Text entry
  - Good for open-ended questions
  - Can include content validation (more on that soon)
- Matrix table
  - Good way to condense lots of similar questions
- “Tracking questions”
  - Often invisible to respondents
  - Records information like timing, technical information like operating system
  - Captcha (respondents will likely find annoying, but can beat bots if that’s a concern)

Fancy alternatives

- Often more visually appealing
- Trade-off is compatibility with older browsers, mobile platforms, screen resolution, etc.
- Sliders
  - Draggable bar
  - Text or graphic labels
  - Can add precision…or noise
- Rank order
- Constant sum
- Pick, group, and rank
- Drill down
  - Good for things like location info (state -> county -> city)
- Hot spot/heat map
- Other options not likely useful for social science
  - But let me know if you want to know more

Formatting questions and choices

Q-tip! W3SCHOOLS.COM HAS MANY USEFUL EXAMPLE CODES TO FORMAT. THEY ALSO HAVE A SIMPLE “TRY IT YOURSELF” CODING SANDBOX TO TRY OUT CODE.

How to format questions and choices

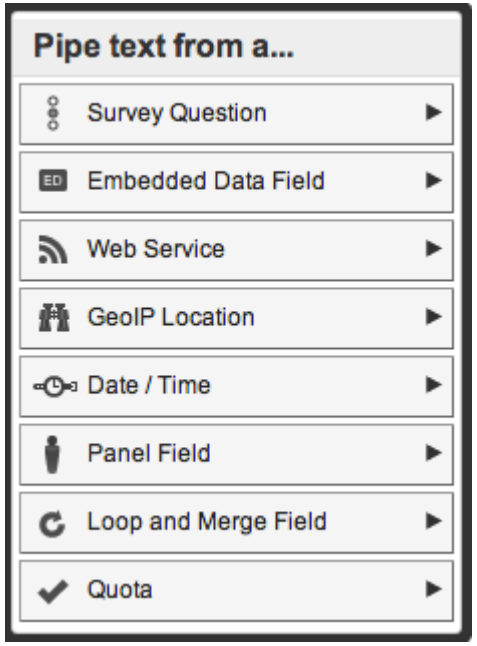
- Qualtrics' "rich content editor" is like Word for formatting
  - WYSIWYG editor
  - Can switch to show HTML code if you want more fine-grain control
- More consistent and granular control possible with a little HTML/CSS
  - Google is your friend
  - Keep in mind that your custom code will interact with the theme's code, which you can't always see
- Q-tip! You can also add Javascript to override some stubborn question types
  - More on this in advanced topics if there's interest

Validation

- Two types of validation
  - Content validation
  - Response validation
- Content validation
  - Minimum, maximum, and length range
  - Types of content (email addresses, phone numbers, dates, etc.)
  - “Custom” validation
    - Uses basic operators (equal to, less than, greater then, empty, contains, regex)
    - Read more about REGular EXpressions here (http://en.wikipedia.org/wiki/Regular_expression)
    - Powerful, but complicated
- Response validation
  - Force response
    - In the past, IRB has been wary of forcing responses
    - IF there’s a justifiable reason to force response, they will likely be okay
  - Request response
    - Better for IRB
    - Nags respondents if they skip, but they can still proceed after dismissing the message
  - Q-tip! Be careful about response validation and inline display logics (more soon!)

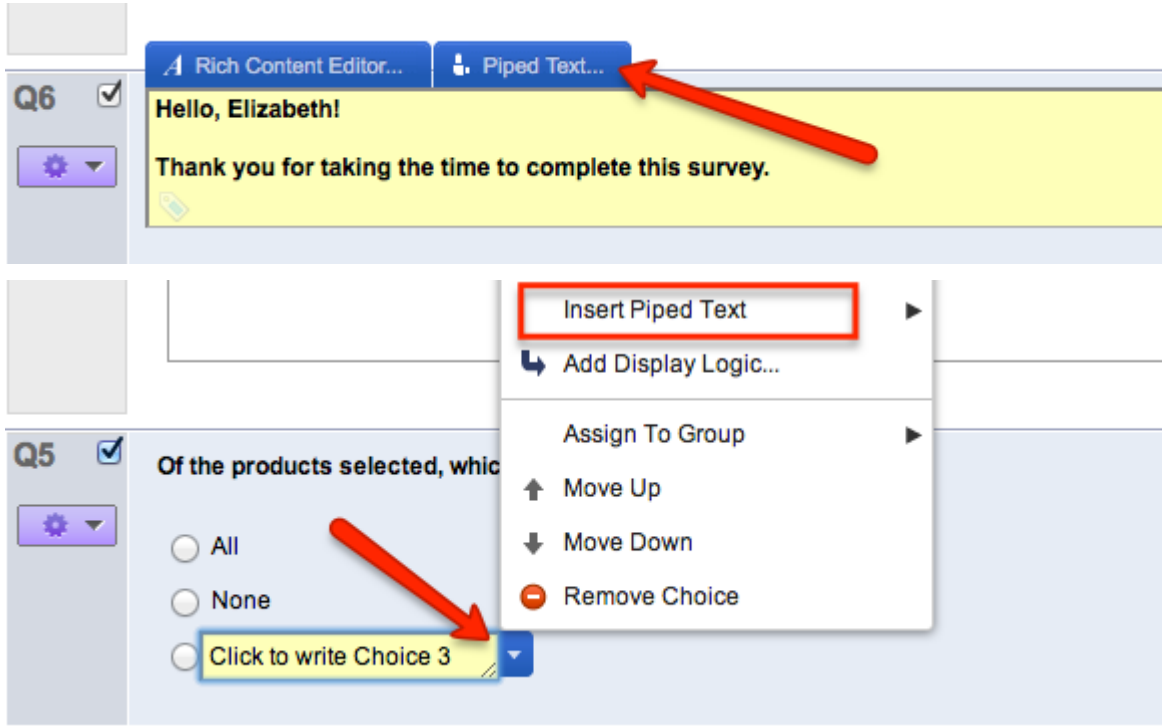
Piped text

- Piped text is automatically generated text that you can insert in many places
- Piped text can come from:



Piped text

- Where to add piped text
- Q-tip! You can insert piped text in non-standard places too! Just get the code and paste it.



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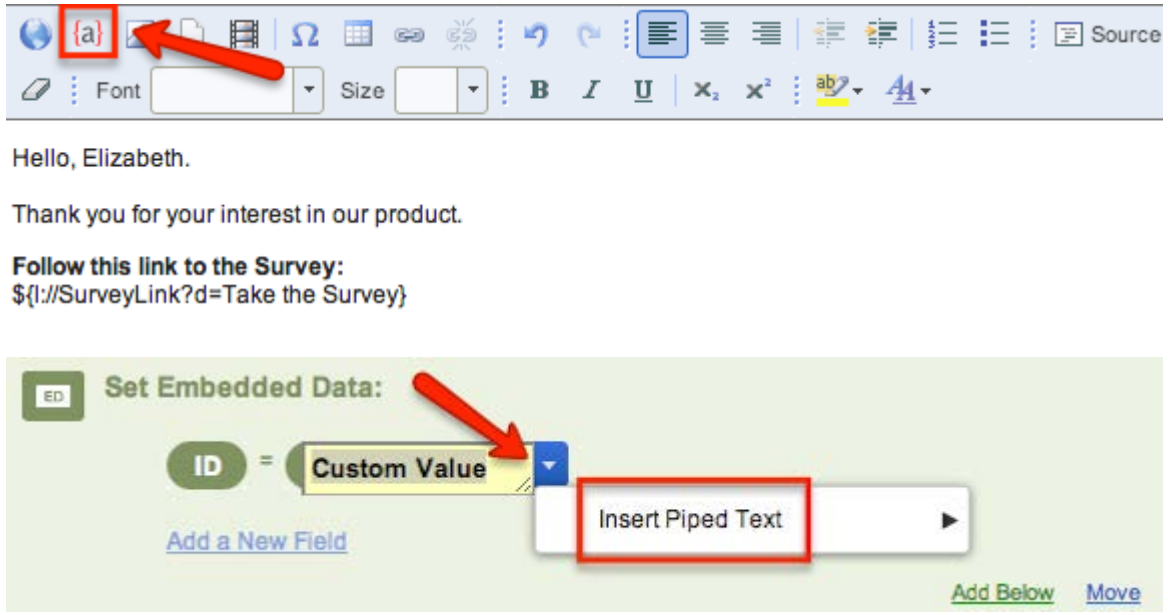
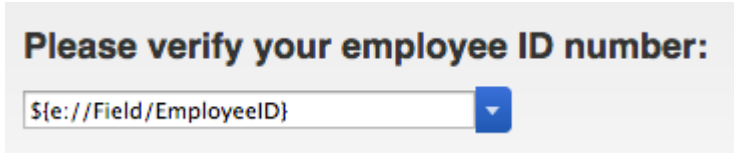


Piped text

- What piped text looks like from your perspective:

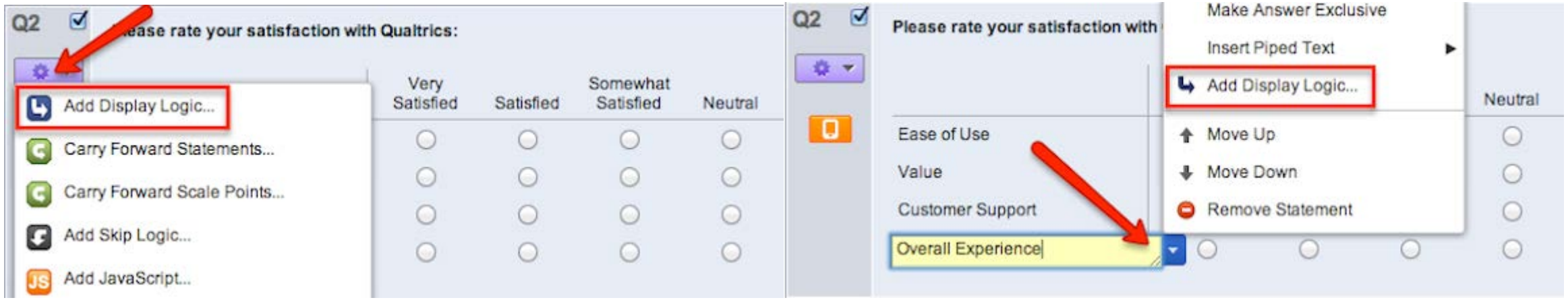


- What piped text looks like from the respondent's perspective:

- Q-tip! Qualtrics refers to questions by ID number, which is based on when it was created, not where it appears in your survey.
- Q-tip! Piped text are generated when the page loads; make sure that source material is ready!

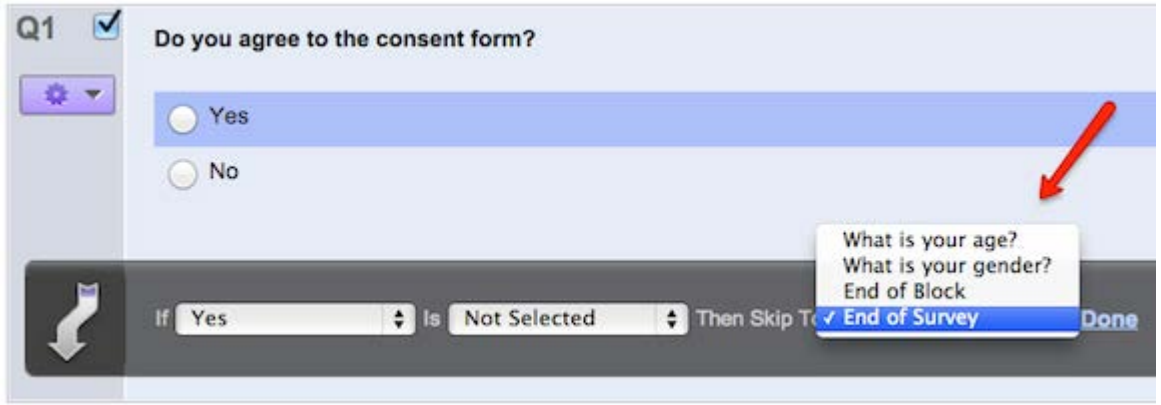
Display logics

- Conditionally display questions and choices based on set of criteria



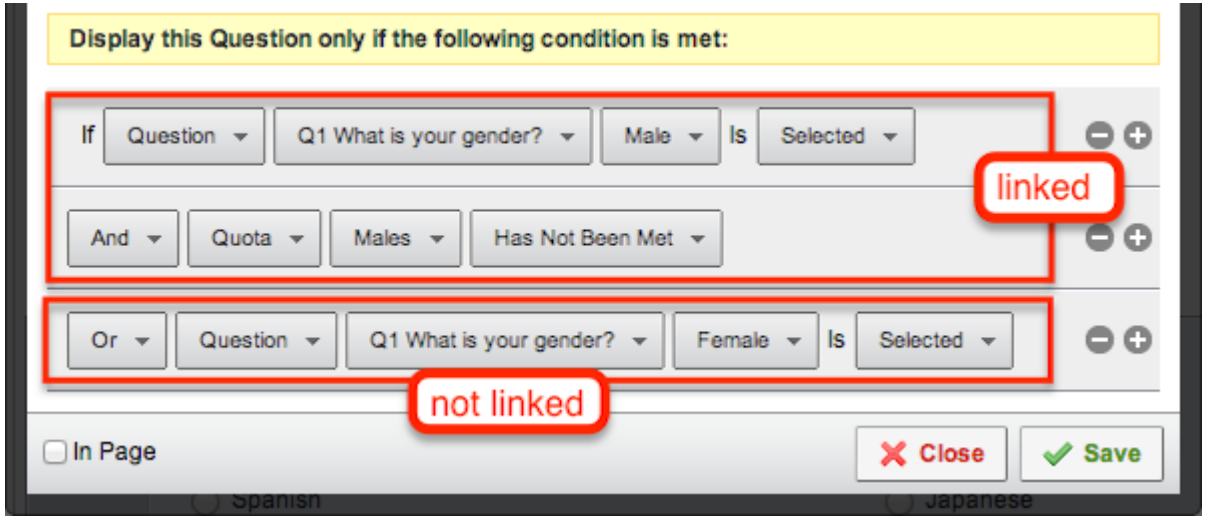
Skip logics

- Conditionally skip questions based on set of criteria



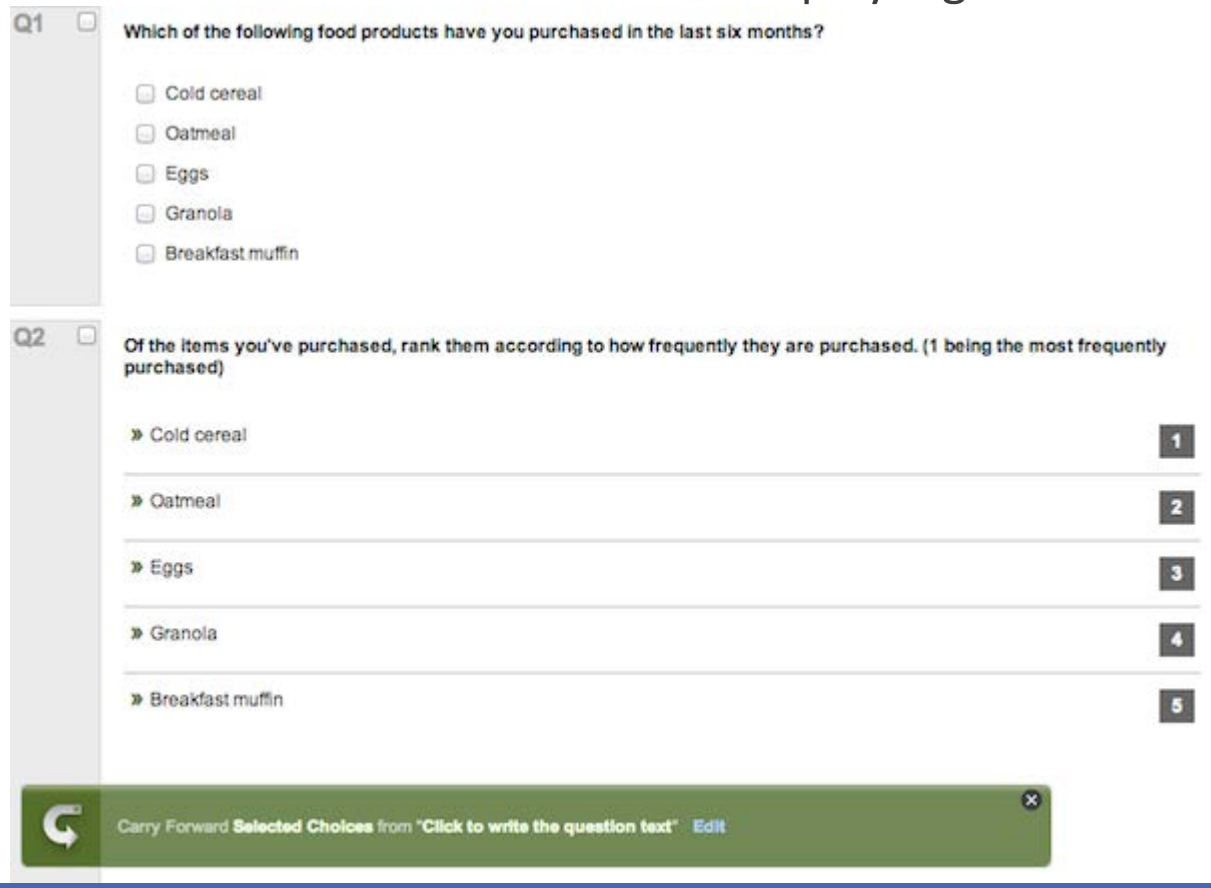
Logics

- Can combine logics
- Q-tip! Try to make sure that your conditions are exhaustive



Carry forward choices

- Can be used as an alternative to display logics for series of questions

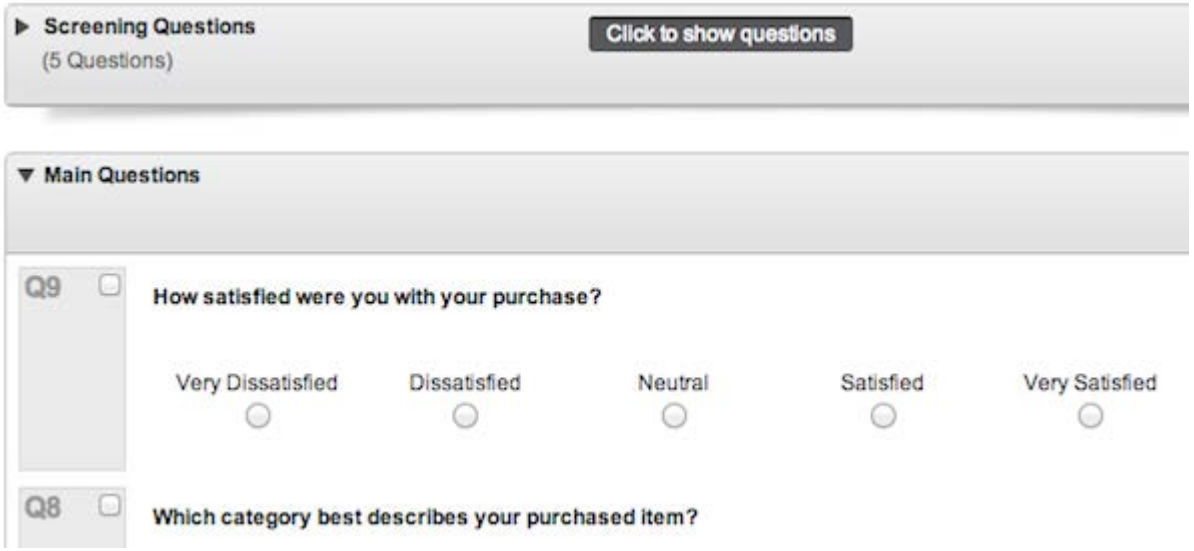


Questions before we move on?

Q-tip! THE NEXT FEW PARTS ARE MORE DEMO-HEAVY AND LESS SLIDE-BASED SO NOW'S A GOOD TIME TO JOT DOWN NOTES.

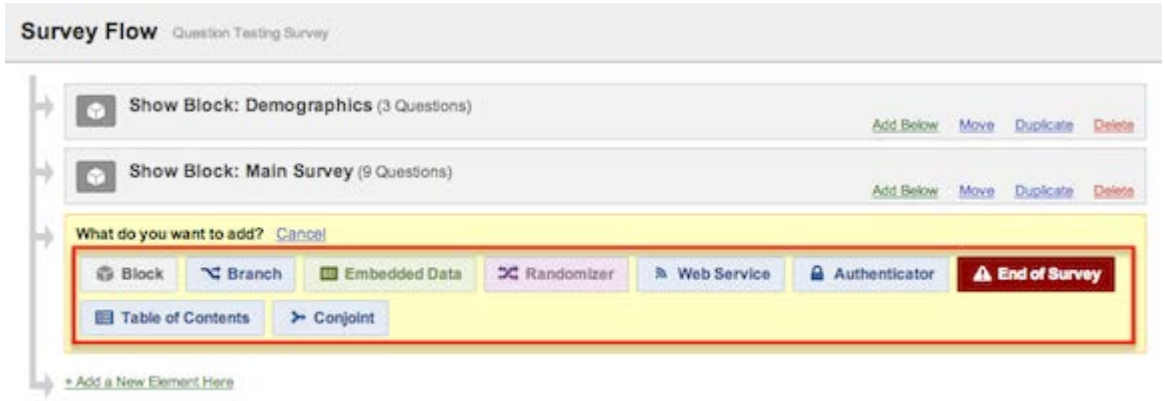
Basic survey flow

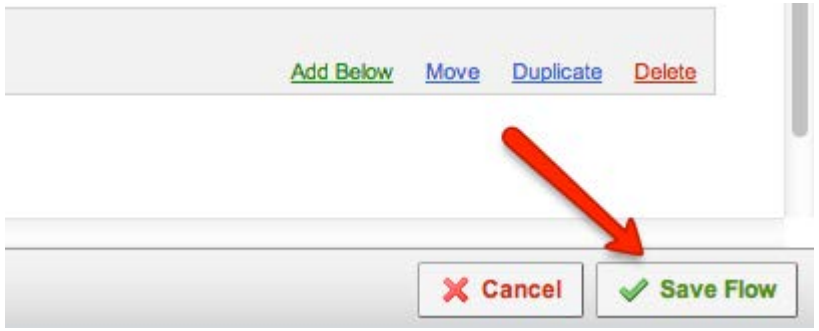
- Questions are contained in blocks
- You can have one long block
- Or many smaller blocks
- Survey flow lets you specify the how and when respondents see certain blocks



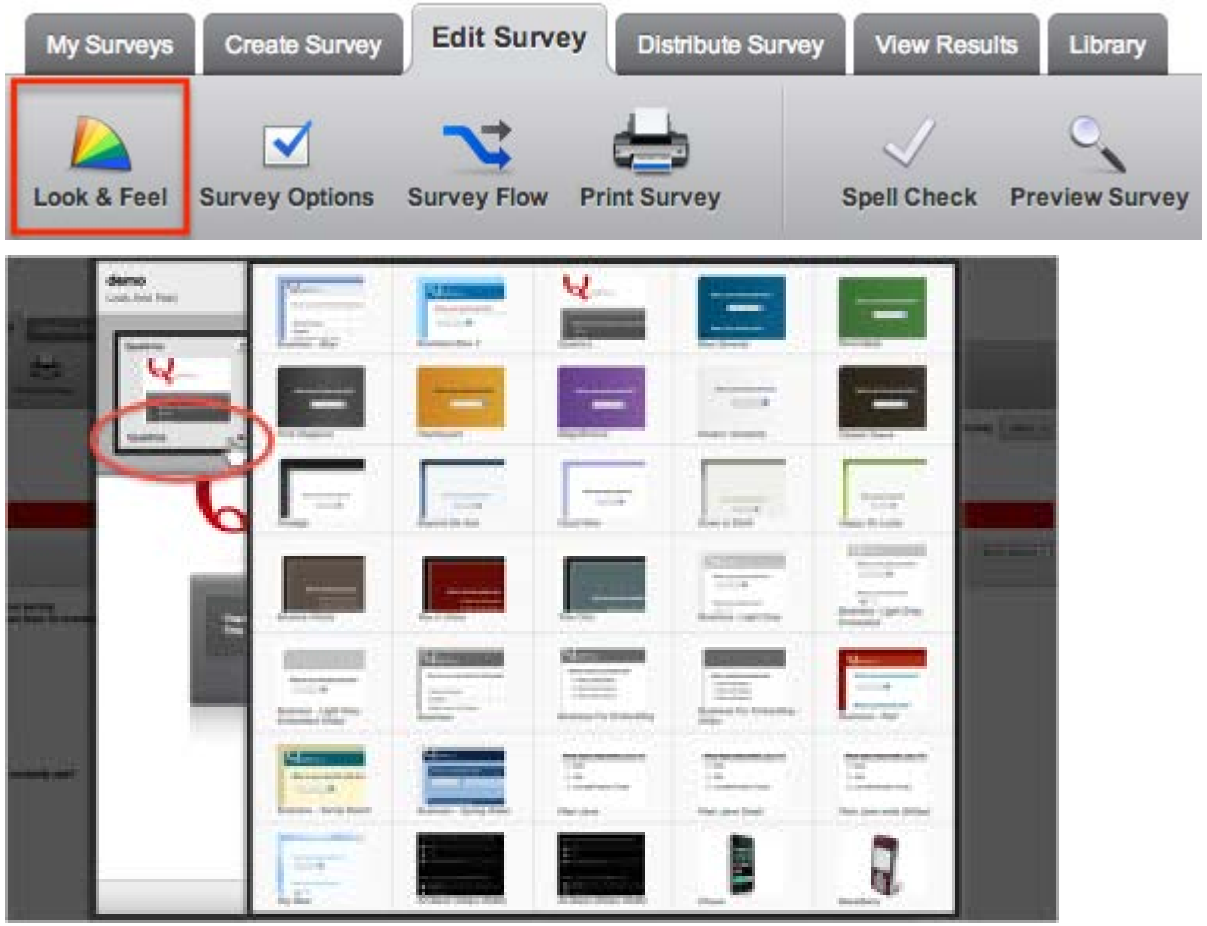
Elements

Survey Flow
Question Testing Survey
Show Block: Demographics (3 Questions)
Add Below
Move
Duplicate
Delete
Show Block: Main Survey (9 Questions)
Add Below
Move
Duplicate
Delete
+ Add a New Element Here


Survey Flow
Question Testing Survey
Show Block: Demographics (3 Questions)
Add Below
Move
Duplicate
Delete
Show Block: Main Survey (9 Questions)
Add Below
Move
Duplicate
Delete
What do you want to add?
Cancel
Block
Branch
Embedded Data
Randomizer
Web Service
Authenticator
End of Survey
Table of Contents
Conjoint
+ Add a New Element Here


Add Below
Move
Duplicate
Delete
Cancel
Save Flow

Look and feel



- Qualtrics lets you change themes
- Customize colors, fonts, number of questions per page, question separators, etc.
- You can add your own CSS
- Q-tip! Keep mobile devices in mind!

Survey options to consider

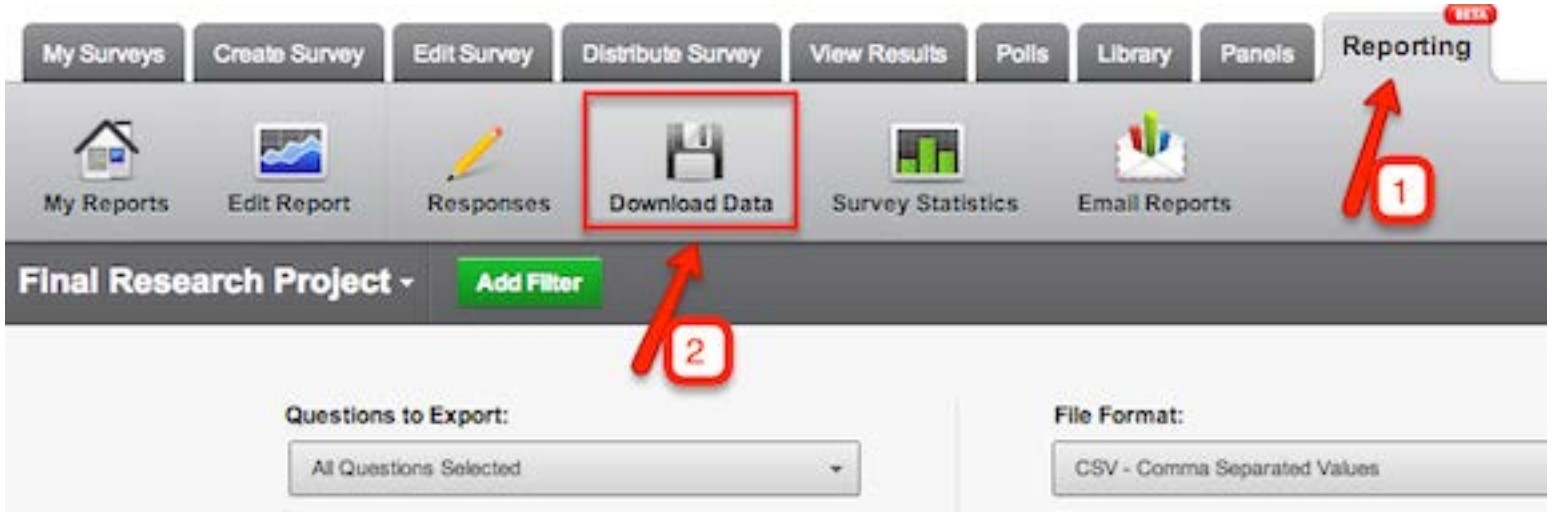
- Should respondents be able to go back?
  - How would that affect skip and display logics?
- Should respondents be able to save and continue?
- Show question numbers?
- Open access or by invitation only?
- What happens to partial completions?
- What happens at the end of the survey?

Collecting and accessing data

- When you're done designing, time to collect data!
- Activate your survey
- Decide how to distribute the survey
- Download your data when it's done
- Q-tip! Qualtrics automatically locks your survey from being edited if you have any completed responses.

Ways to distribute

Downloading data



ï»¿V1	V2	V3	V4	V5	V6
ResponseID	ResponseSet	Name	ExternalDataReference	EmailAddress	IPAddress
R_dola3hu4LaNiV5r	Default Response Set	Anonymous			199.58.199.98
R_3TWPMdpKbaAE12R	Default Response Set	Anonymous			190.78.147.107
R_82CljhFSGar7WLP	Default Response Set	Anonymous			199.58.199.98
R_3VgZtPl8EqdyJJr	Default Response Set	Anonymous			58.215.52.142
R_0j3H5X3XrGdCykR	Default Response Set	Anonymous			123.129.240.173
R_8vQ3aDlNVNVy28t	Default Response Set	Anonymous			199.58.199.98
R_9WV9b6NAEx9NujX	Default Response Set	Anonymous			123.129.240.173
R_5jocZSDjHZblcp7	Default Response Set	Anonymous			187.188.195.66
R_8vluGcTNxCxwdNj	Default Response Set	Anonymous			187.188.195.66

Tips, tricks, Q&A

Q-tip! THE NEXT PARTS ARE BASED ON INTEREST, SO WE CAN SKIP AROUND AS YOU WANT. ALSO, THE SLIDES BECOME VIRTUALLY USELESS IN THIS PART SO PAY ATTENTION TO THE DEMO.

Randomization

- Question randomization vs. block randomization
  - Different use scenarios
- Randomize choices
- How Qualtrics reports randomization
- Using the built-in randomizer vs. your own randomizer
  - Coding your own randomizer
    - Pros
    - Cons

Customized code

- Use scenarios
- Adding HTML and CSS to your survey
- Adding Javascript to your survey
- Testing your code

Advanced survey flow

- Embedded data
- Web service
- Authenticator
- End of survey
- Anonymizing responses
  - Panels

Where to learn more

Q-tip! START AT HTTP://QUALTRICS.COM/UNIVERSITY

Where to learn more

- http://qualtrics.com/university/researchsuite/research-resources/other-resources/ebook-downloads/
- http://qualtrics.com/university/researchsuite/developer-tools/custom-programming/example-code-snippets/
- http://www.youtube.com/user/QualtricsSoftware

Final questions?

Q-tip! DO SOME AWESOME RESEARCH!

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