



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

My Surveys **Create Survey** **Edit Survey** **Distribute Survey** **View Results** **Polls** **Library** **Panels** **Administration** **Reporting**

Create Survey **Email Survey** **View Results** **Message Center**

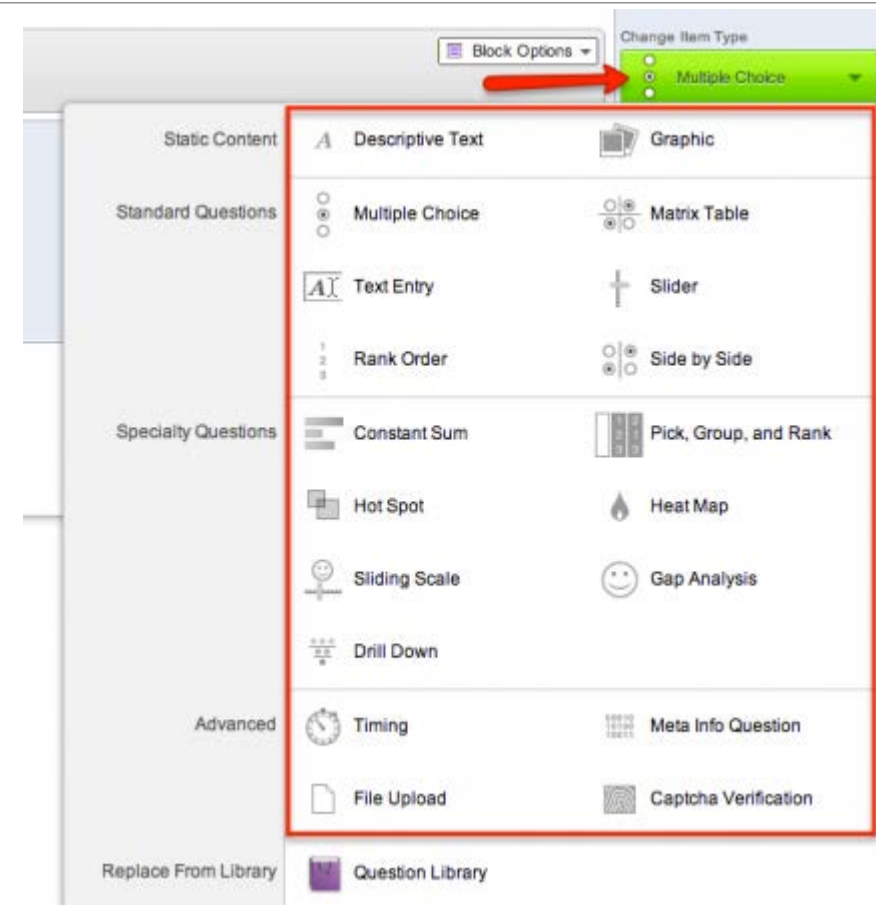
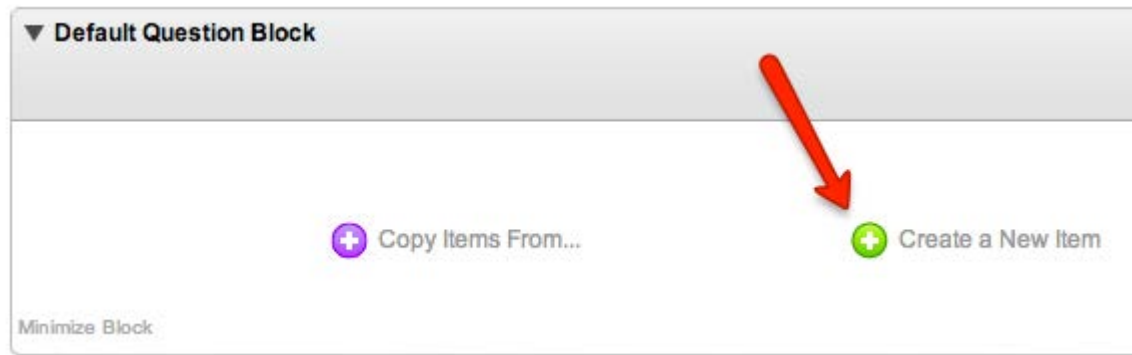
All Surveys **Manage Folders** **Show More Data**

★	Active	Name	Responses	Tasks
				My Surveys
<input type="checkbox"/>	<input type="checkbox"/>	Group Test Modified on: Jun 26, 2013	0	Edit Results Send <input type="checkbox"/> View <input type="checkbox"/> Collaborate <input type="checkbox"/> Copy <input type="checkbox"/> Translate <input type="checkbox"/> Delete
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Qualtrics University Demonstration Modified on: Jun 21, 2013	0	<input type="checkbox"/> Edit <input type="checkbox"/> Results <input type="checkbox"/> Send <input type="checkbox"/> View <input type="checkbox"/> Collaborate <input type="checkbox"/> Copy <input type="checkbox"/> Translate <input type="checkbox"/> Delete
				Shared: John Smith Surveys
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Market Research Modified on: Jul 8, 2013		<input type="checkbox"/> Edit <input type="checkbox"/> Results <input type="checkbox"/> Send <input type="checkbox"/> View <input type="checkbox"/> Copy <input type="checkbox"/> Translate <input type="checkbox"/> Remove

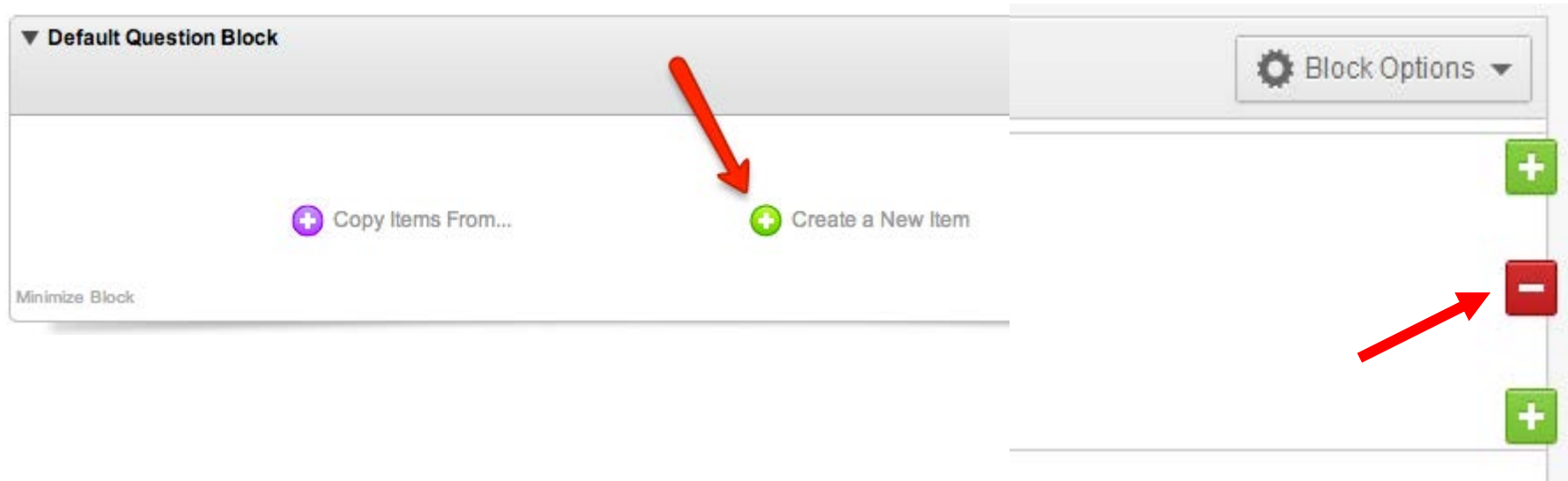
Creating your first survey

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

Adding, deleting, and copying questions

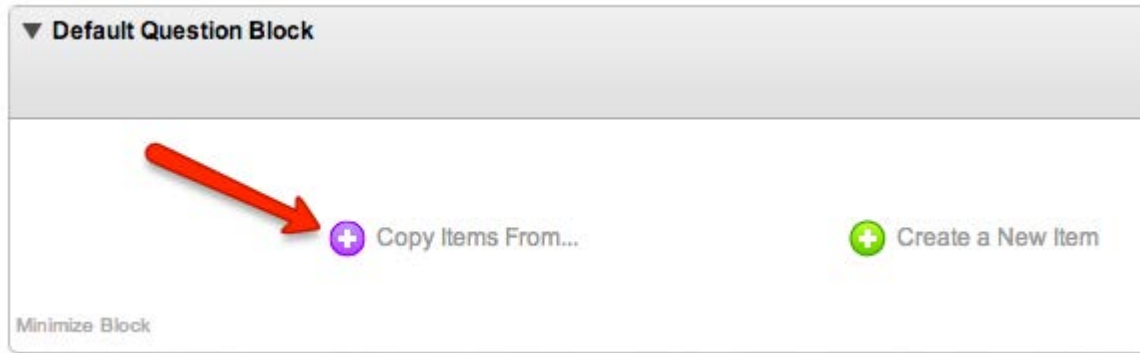


Adding, deleting, and copying questions



Adding, deleting, and copying questions


▼ Default Question Block




Copy Items From... Create a New Item

Minimize Block






Q1 What is your gender?

 Male
Female

Q2 Employment status?

 Unemployed
Part Time
Full-Time

4 questions selected

-  Send to Trash
-  Copy
-  Group
-  Move to a New Block
-  Move

Validation

- None
- Force Response

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

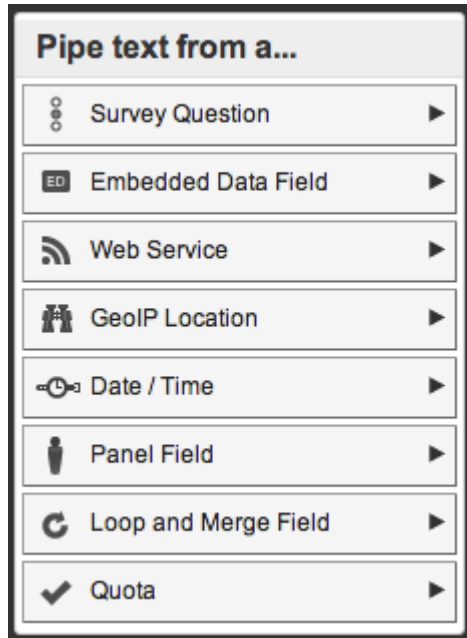
- Qualtrics' "rich content editor" is like Word for formatting
 - WYSIWYG editor
 - Can switch to show HTML code if you want more fine-grain control
- More consistent and granular control possible with a little HTML/CSS
 - Google is your friend
 - Keep in mind that your custom code will interact with 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 than, 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.

The screenshot illustrates the survey editor interface. At the top, there are two tabs: 'Rich Content Editor...' and 'Piped Text...'. A red arrow points to the 'Piped Text...' tab. Below the tabs, question Q6 is displayed with a yellow background. It contains the text 'Hello, Elizabeth!' and 'Thank you for taking the time to complete this survey.' Below Q6, question Q5 is shown. It has the text 'Of the products selected, which' and three radio button options: 'All', 'None', and 'Click to write Choice 3'. A red arrow points to the 'Click to write Choice 3' option, which has a dropdown arrow. A context menu is open over this dropdown, with 'Insert Piped Text' highlighted by a red box. Other menu items include 'Add Display Logic...', 'Assign To Group', 'Move Up', 'Move Down', and 'Remove Choice'.

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.

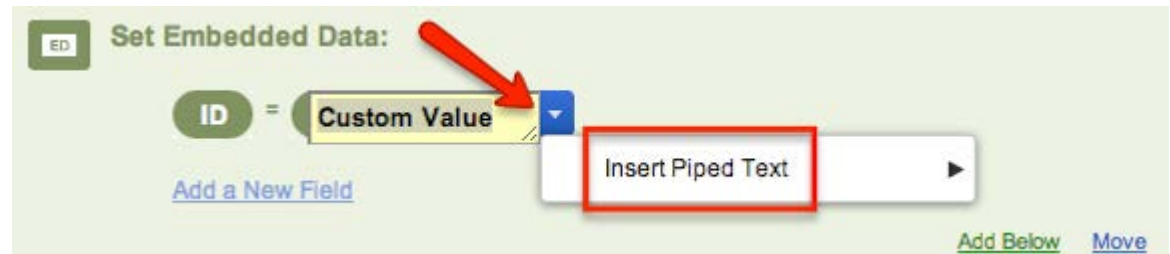


Hello, Elizabeth.

Thank you for your interest in our product.

Follow this link to the Survey:

`$(!://SurveyLink?d=Take the Survey)`



Piped text

- What piped text looks like from your perspective:

Please verify your employee ID number:

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

Your ID number is: 71

- **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

The screenshot shows the Qualtrics interface for editing a question (Q2). The question text is "Please rate your satisfaction with Qualtrics:". The response options are "Very Satisfied", "Satisfied", "Somewhat Satisfied", and "Neutral". A red arrow points to the gear icon (settings) in the top left of the question editor. A dropdown menu is open, showing the "Add Display Logic..." option highlighted with a red box. Other options in the menu include "Carry Forward Statements...", "Carry Forward Scale Points...", "Add Skip Logic...", and "Add JavaScript...".

The screenshot shows the "Display Logic" dialog box. The title is "Display Logic (Please rate your satisfaction with Qualtrics:)". The main text says "Display this Question only if the following condition is met:". Below this, there is a condition builder with the following fields: "If", "Question", "Q1 Have you ever used Qualtrics?", "Yes", "Is", "Selected". There are minus and plus signs to the right of the condition. At the bottom, there is an "In Page" checkbox, a "Close" button, and a "Save" button.

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

Display this Question only if the following condition is met:

If	Question	Q1 What is your gender?	Male	Is	Selected	-	+
And	Quota	Males	Has Not Been Met			-	+
Or	Question	Q1 What is your gender?	Female	Is	Selected	-	+

In Page

Spanish Japanese

Carry forward choices


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

Q1 Which of the following food products have you purchased in the last six months?

- Cold cereal
- Oatmeal
- Eggs
- Granola
- Breakfast muffin

Q2 Of the items you've purchased, rank them according to how frequently they are purchased. (1 being the most frequently purchased)

» Cold cereal	1
» Oatmeal	2
» Eggs	3
» Granola	4
» Breakfast muffin	5

 Carry Forward Selected Choices from "Click to write the question text" [Edit](#)

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

The screenshot displays a survey interface with two main sections:

- Screening Questions (5 Questions):** A grey bar with a right-pointing arrow and a button labeled "Click to show questions".
- Main Questions:** A grey bar with a downward-pointing arrow.

Below the 'Main Questions' section, two questions are visible:

- Q9:** "How satisfied were you with your purchase?" with a 5-point Likert scale: Very Dissatisfied, Dissatisfied, Neutral, Satisfied, Very Satisfied. Each option has a radio button below it.
- Q8:** "Which category best describes your purchased item?"

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](#)



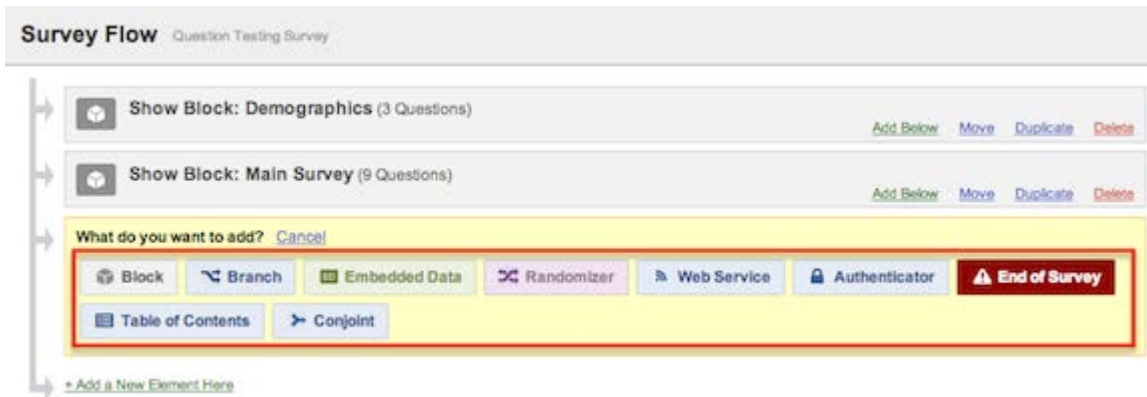
Survey Flow Question Testing Survey

- 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](#)

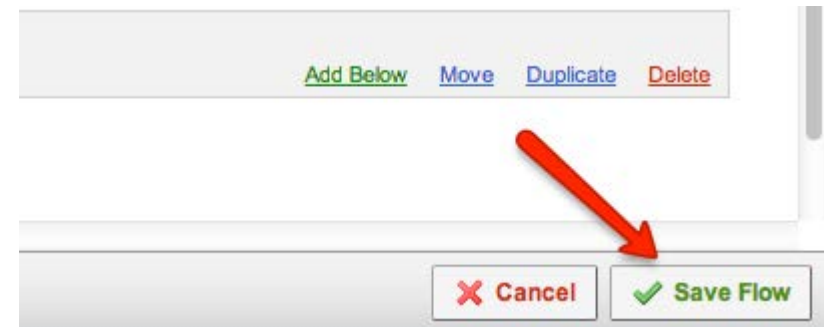
- Block
- Branch
- Embedded Data
- Randomizer
- Web Service
- Authenticator
- End of Survey
- Table of Contents
- Conjoint

[+ Add a New Element Here](#)

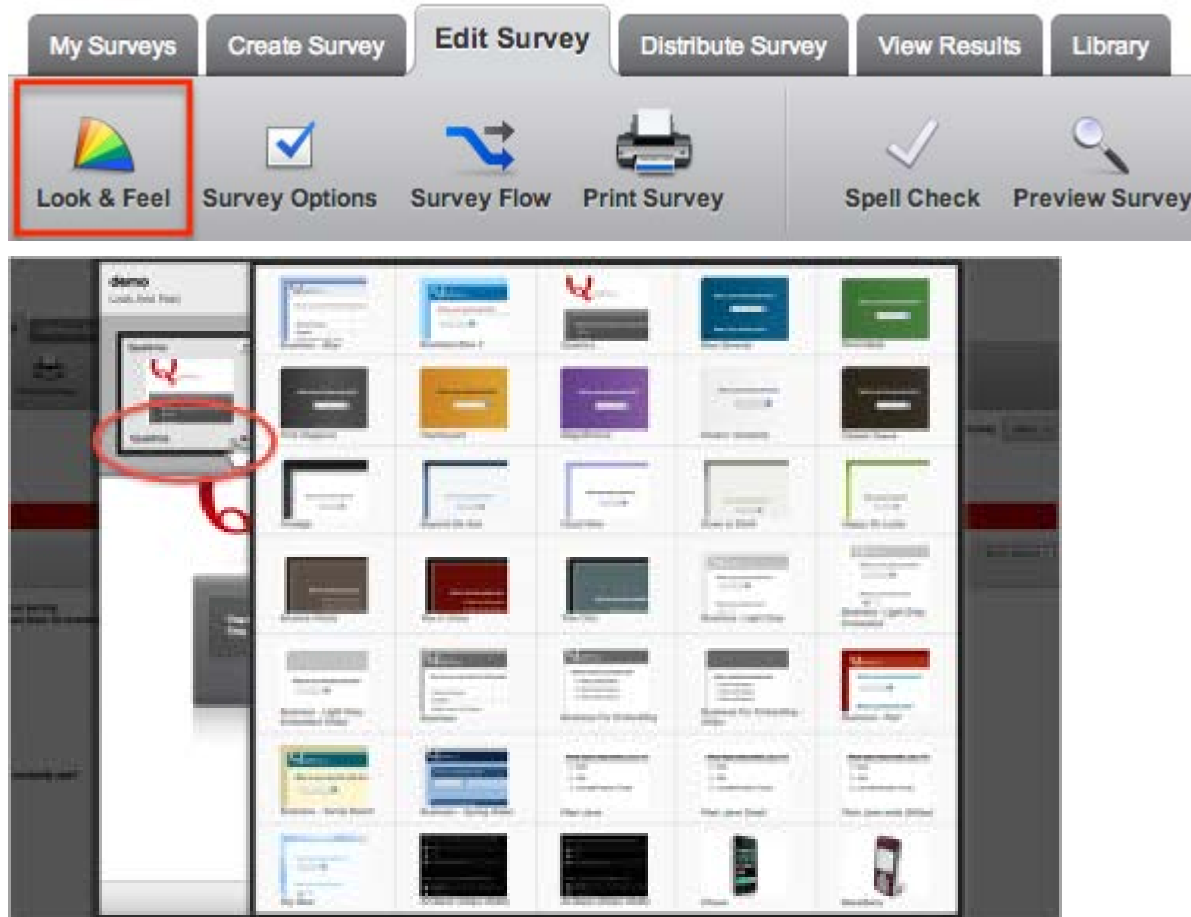


[Add Below](#) [Move](#) [Duplicate](#) [Delete](#)

[X 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

Survey Link Email Survey Email History Social Media In-Page Popup Website Feedback Survey Director Preview Survey

Final Research Project ▾ ✓ Survey was activated on:

Need respondents? Use Qualtrics Panels. [Click here to get a quote.](#)

Your Anonymous Survey Link:

http://survey.qualtrics.com/SE/?SID=SV_bvbKLHCEeyT2NvI

You can copy this link, then paste it into an email or website.

Note: This will not track identifying information. If needed, try our [Survey Mailer](#).

Your Anonymous Survey Link:

[Click here to take a survey.](#)

Link Text:

HTML Link:

You can copy this link, then paste it into an email or website.

Note: This will not track identifying information. If needed, try our [Survey Mailer](#).

qualtrics.com

My Surveys Create Survey Edit Survey Distribute Survey View Results Polls Library

Survey Link Email Survey Email History Social Media In-Page Popup Website Feedback

Downloading data

The screenshot shows a navigation bar with the following tabs: My Surveys, Create Survey, Edit Survey, Distribute Survey, View Results, Polls, Library, Panels, and Reporting (marked with a 'NEW' badge). Below the navigation bar are icons for My Reports, Edit Report, Responses, Download Data (highlighted with a red box and arrow labeled '2'), Survey Statistics, and Email Reports. The 'Reporting' tab is also highlighted with a red box and arrow labeled '1'. Below the navigation bar, the current project is 'Final Research Project' with an 'Add Filter' button. Below that, there are two dropdown menus: 'Questions to Export:' (set to 'All Questions Selected') and 'File Format:' (set to 'CSV - Comma Separated Values').

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_82CjhhFSGar7WLP	Default Response Set	Anonymous			199.58.199.98
R_3VgZtPI8EqdyJJr	Default Response Set	Anonymous			58.215.52.142
R_0j3H5X3XrGdCykR	Default Response Set	Anonymous			123.129.240.173
R_8vQ3aDINVNVy28t	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

 *tip!* START AT [HTTP://QUALTRICS.COM/UNIVERSITY](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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