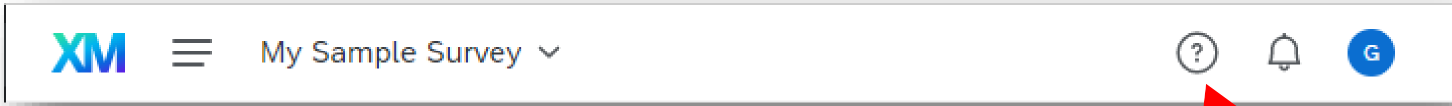
Using Qualtrics Effectively

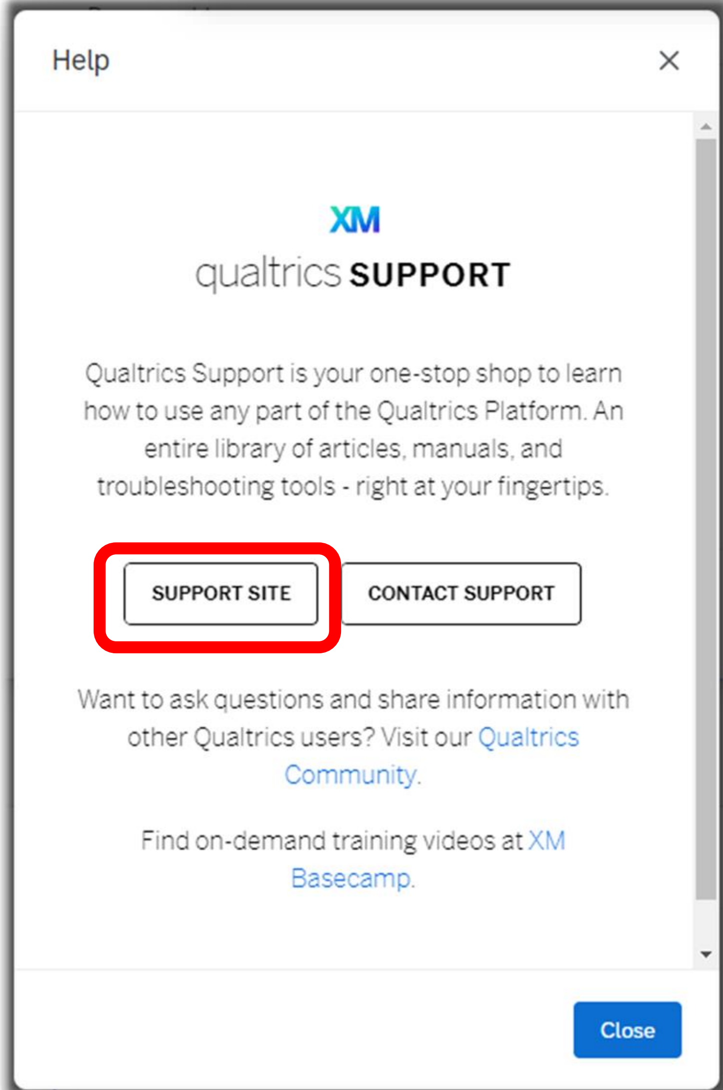
by Debby Kermer

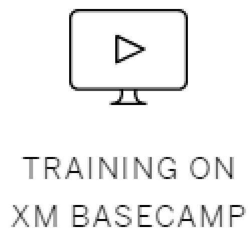
George Mason University Libraries

Digital Scholarship Center

Use the Help

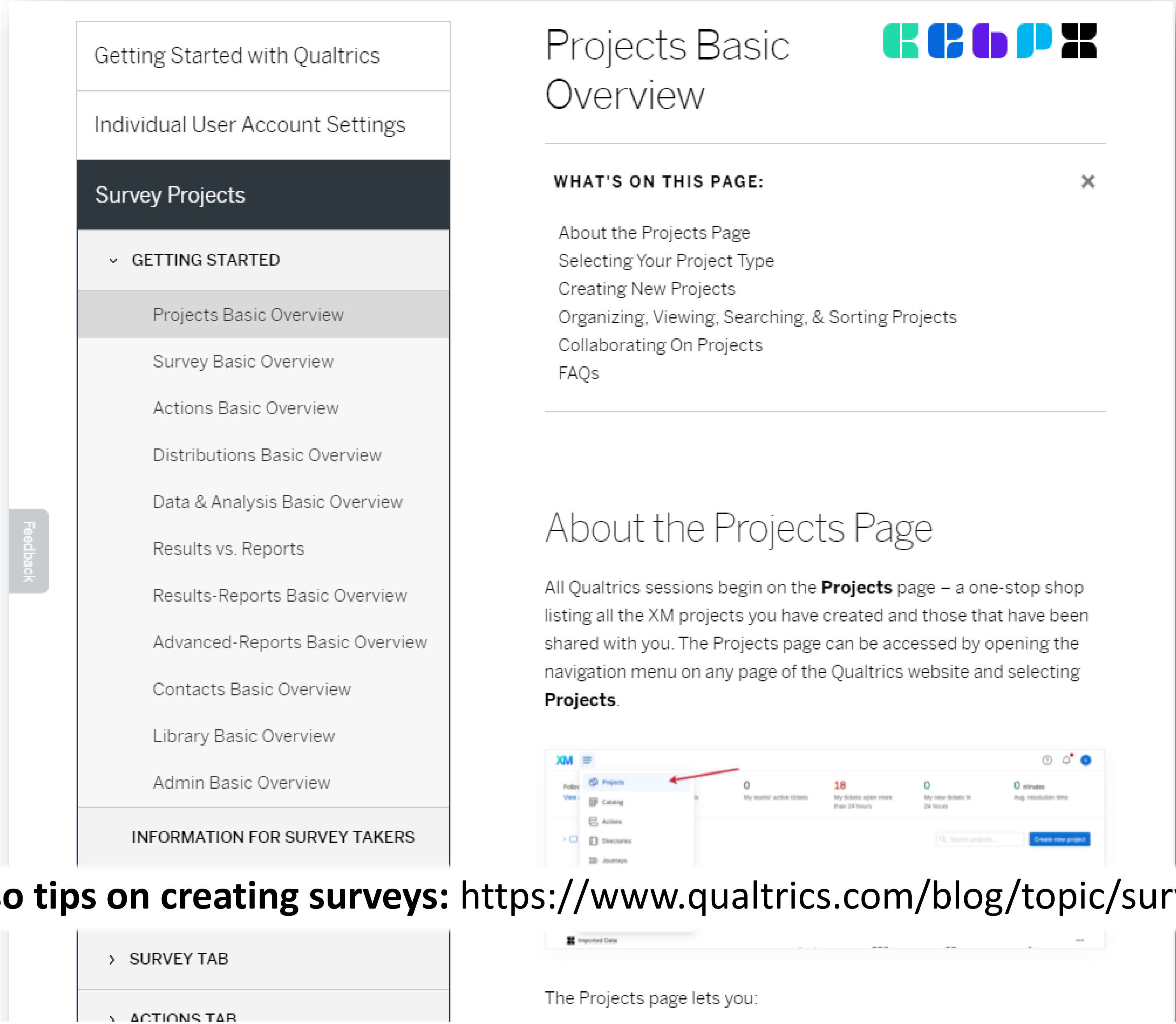






https://www.qualtrics.com/support/

Tutorials



See also tips on creating surveys: https://www.qualtrics.com/blog/topic/surveys/

https://www.qualtrics.com/support/survey-platform/getting-started/survey-platform-overview/

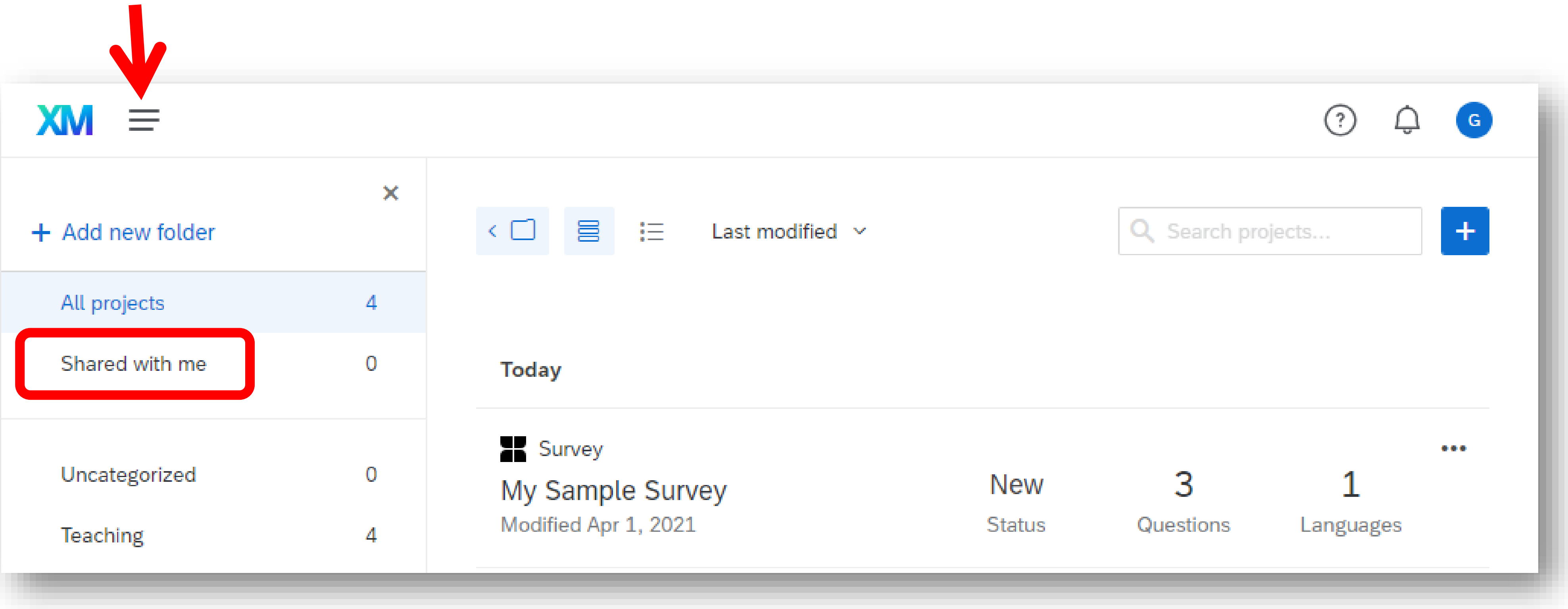
Navigation

Main Screen

After you have created a project, this will be the landing screen when you log in.

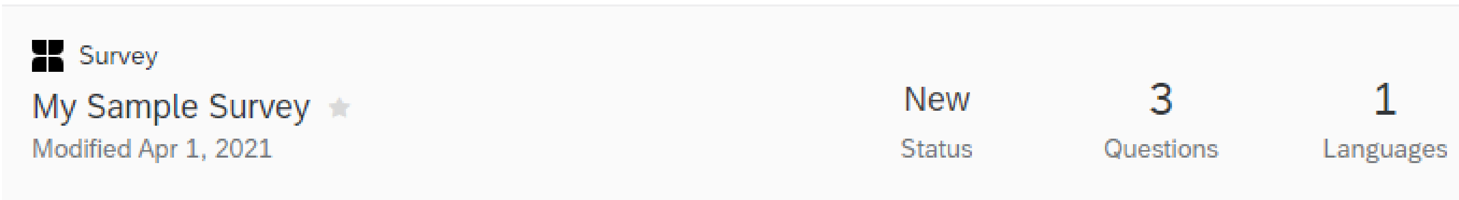
You can organize your projects in folders if you wish.
Look in folders if you cannot find a project that has been shared with you.

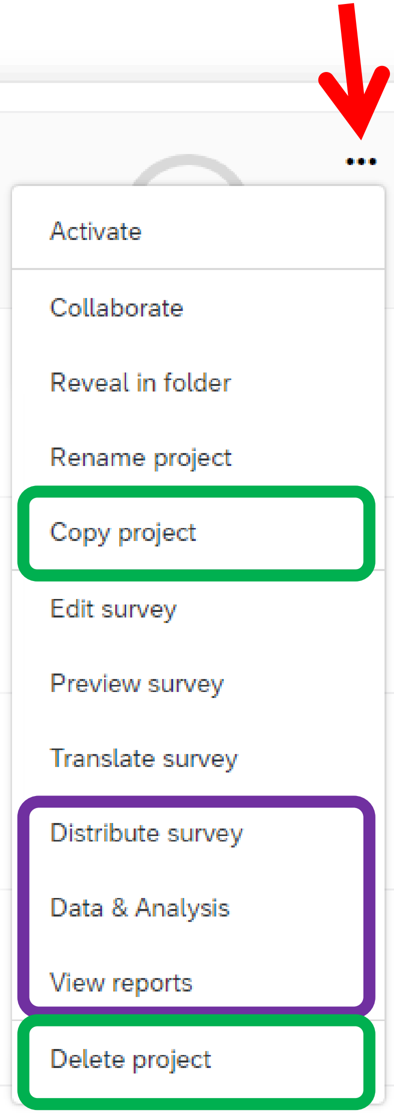
To get to this screen, choose Projects from the primary navigation or click the logo.



Project Options

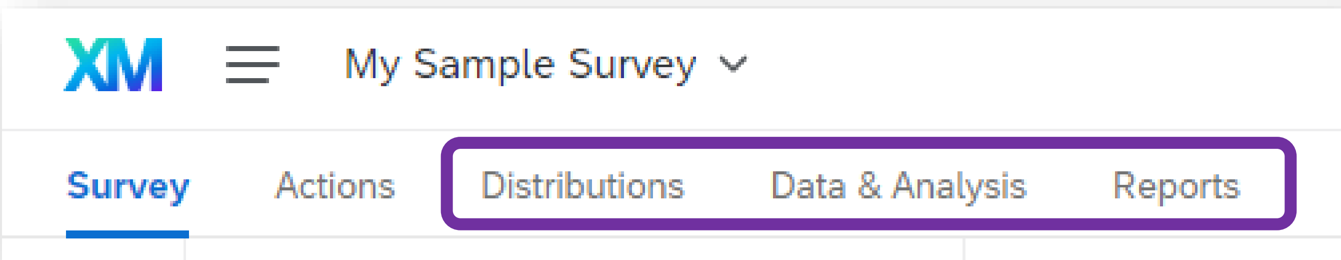
In the list of projects, the **drop-down menu** allows quick access to common tasks.





You can do many of these actions from the Survey tab.

But, this is the ***only*** place to **copy**, or **delete** the project.



Navigation - Projects

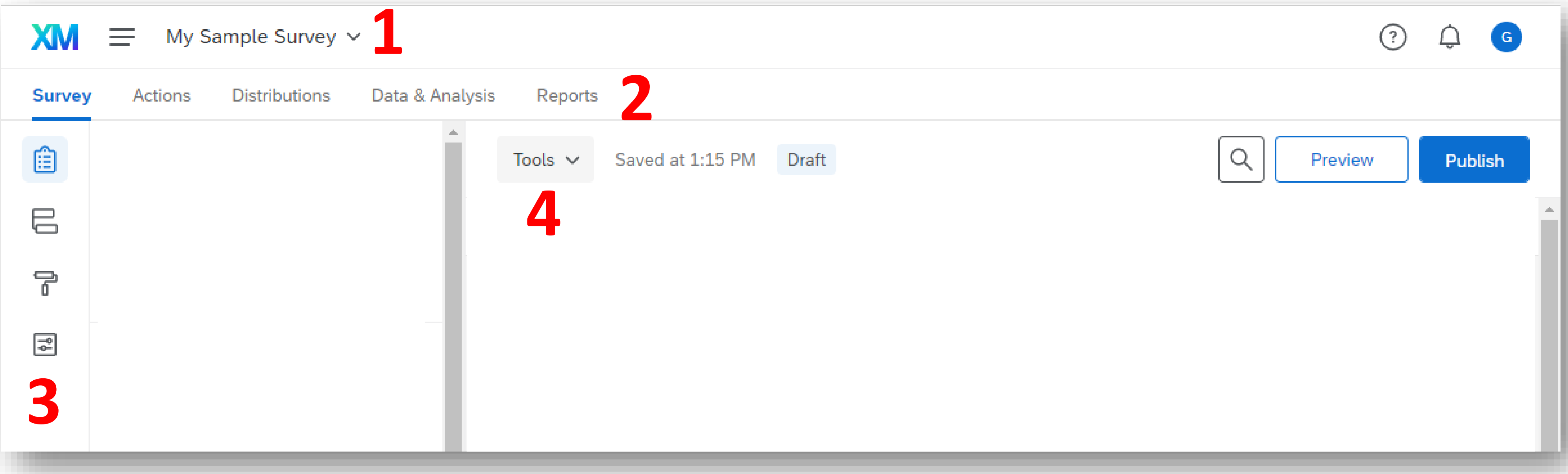
To edit the Survey, click a project or choose **Edit Survey** from the drop-down menu.

You can **change projects** in the upper left drop-down (#1).

Different phases of the project are accessed in the main survey navigation (#2).

Other ways of editing the survey are accessed in the sub-navigation (#3).

Other project actions are available in the **Tools** drop-down (#4)



Preservation & Sharing

with yourself and those who have Qualtrics accounts

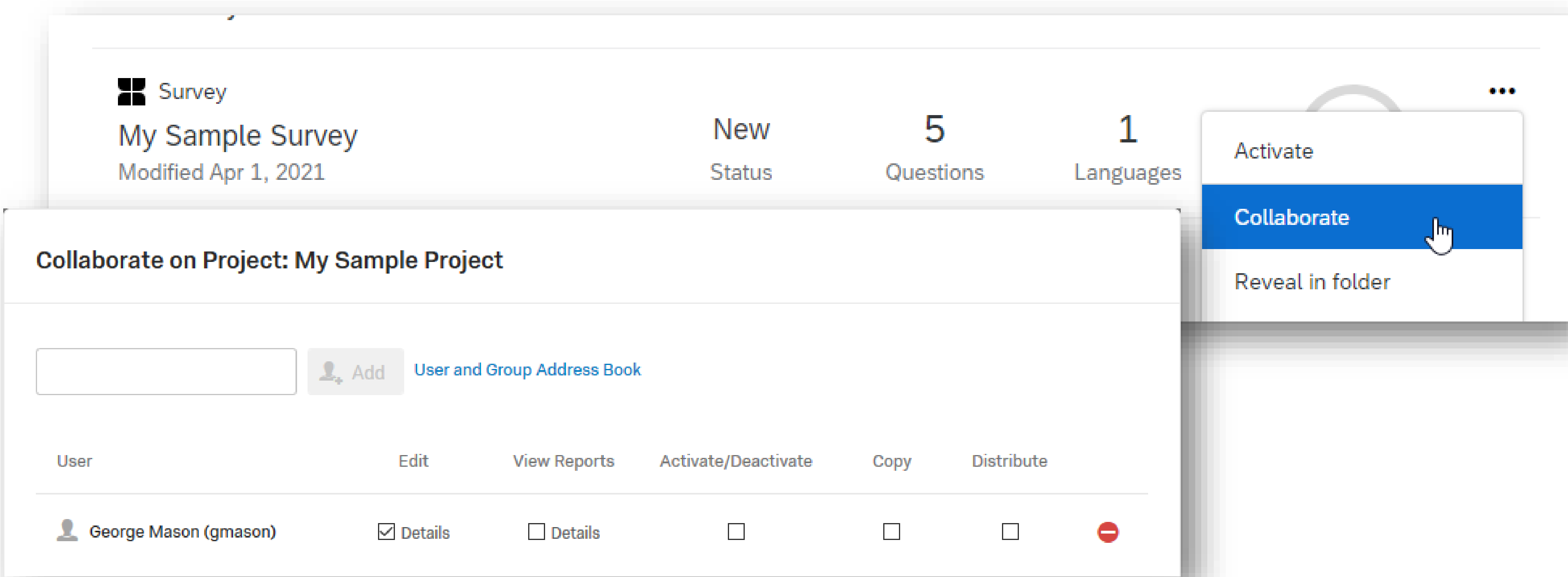
Collaboration

Everybody on a team should have separate accounts. Do **not** share passwords.

Share the project to give others the ability to edit the questionnaire or view the data.

Type their email in the box and click Add. Their name will pop up if they are in the same organization, but you can share with anybody unless restricted by the admin.

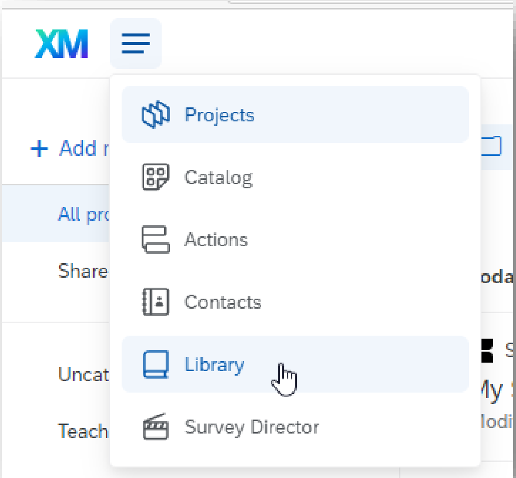
Be sure to choose appropriate permissions.

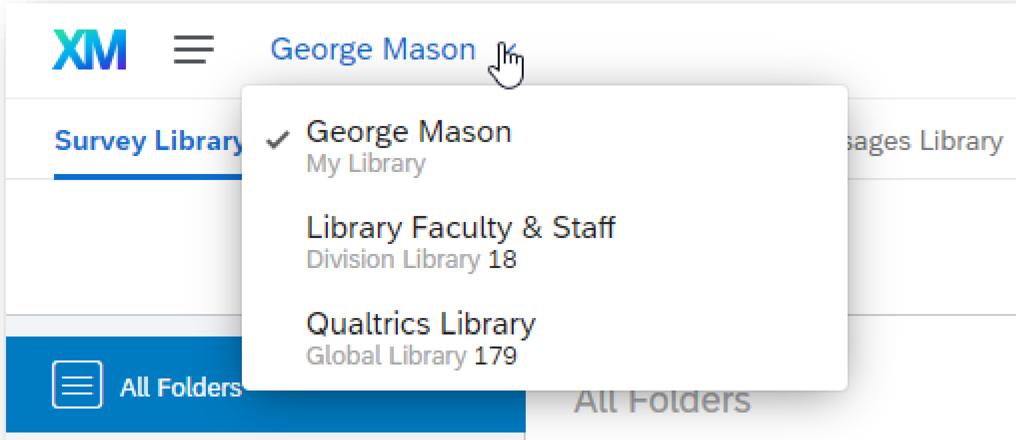


https://www.qualtrics.com/support/survey-platform/my-projects/sharing-a-project/

Libraries

You can **store** and **retrieve** survey elements in the various Qualtrics' Libraries.

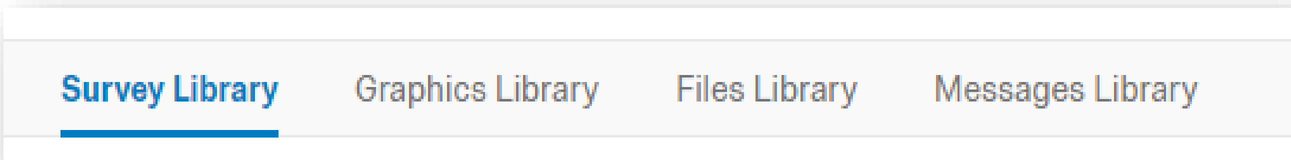




Your organization may have set up a **shared** library for you and your colleagues.

You can also store elements in your **personal** Library to more easily find and reuse.

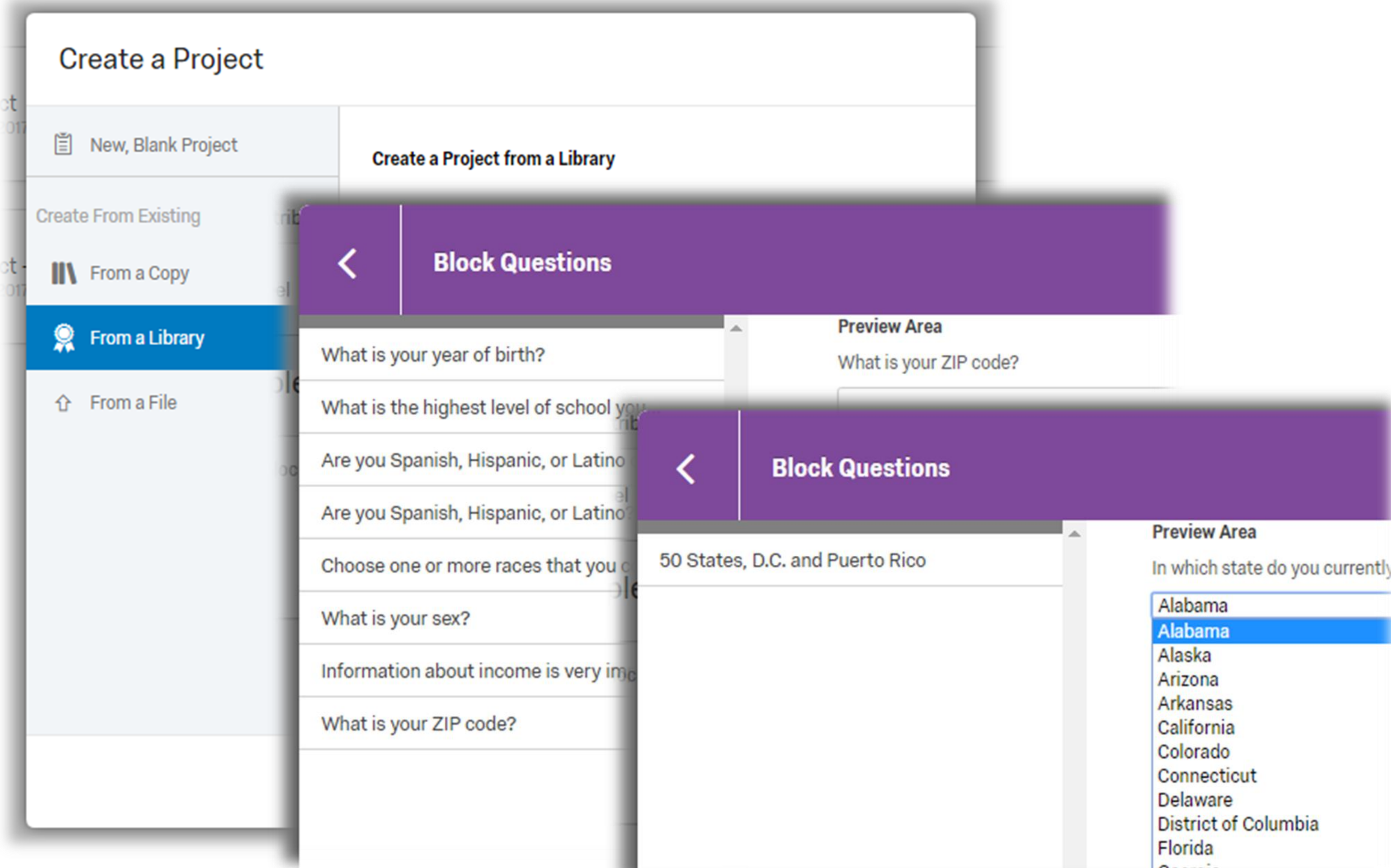
Qualtrics has already stored many common survey elements in their **Global Library**.
It has many sample surveys and special questions like lists of US States & Countries.



https://www.qualtrics.com/support/survey-platform/account-library/library-overview/

Qualtrics Library

Has entire surveys or blocks of questions.



Saving

both electronic and hard copies

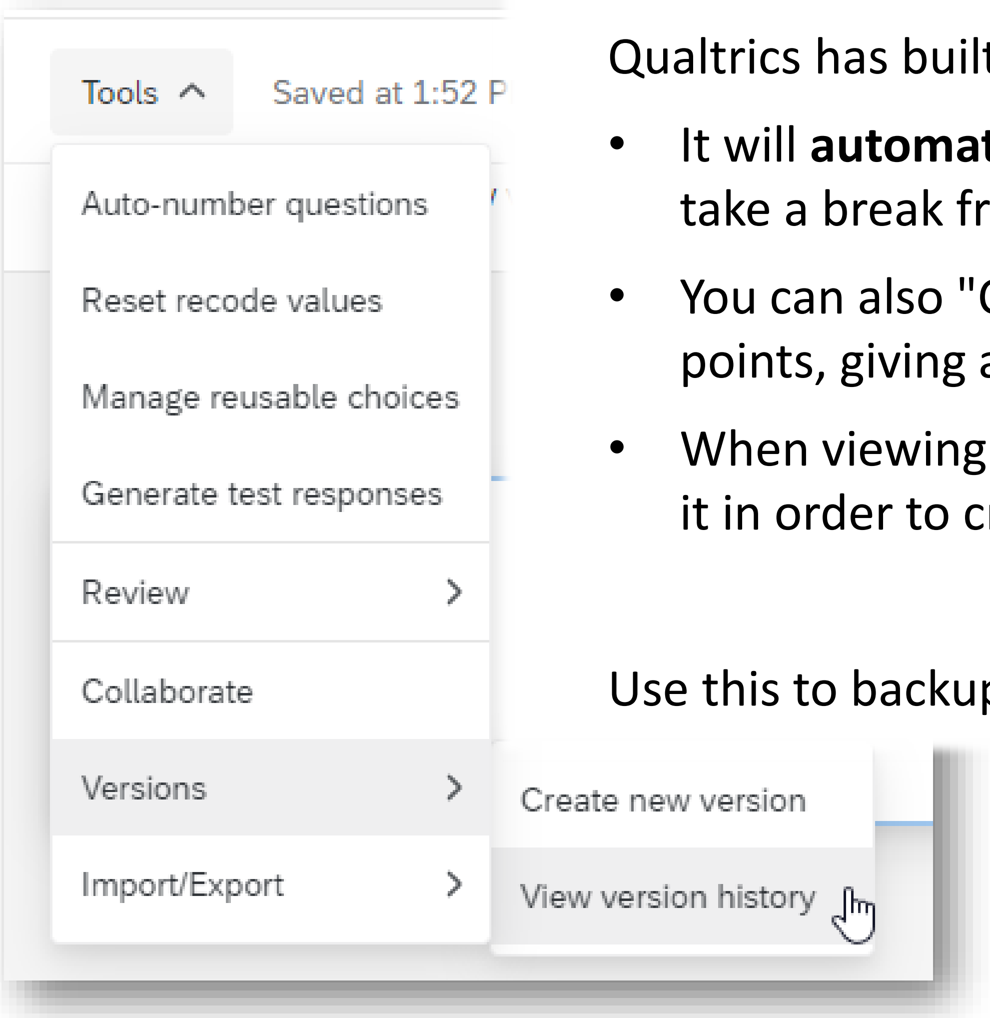
Auto-saving

- Changes to your survey save **automatically**, when connected to the internet
  - If internet is lost, will display a message that it didn't save
  - When the internet is restored, will unusually catch up.

- When changing questions, there is NO **Undo**
  - Sometimes it will save hidden answer choices, but not always
  - Always copy a question first before making changes

- When *deleting* questions, they go into a "**trash can**"
  - Scroll to the bottom to restore
  - If you know you will not restore them, delete them permanently to speed up page loading.

Backups



Qualtrics has built-in **Version Control**:

- It will **automatically** save a version when you take a break from editing.
- You can also "Create a New Version" **manually**, at key points, giving a description so that you can find it easily.
- When viewing a revision, you can Restore or Export it in order to create a new survey.

Use this to backup your survey *instead* of copying it.

https://www.qualtrics.com/support/survey-platform/survey-module/more-survey-module/saving-and-restoring/

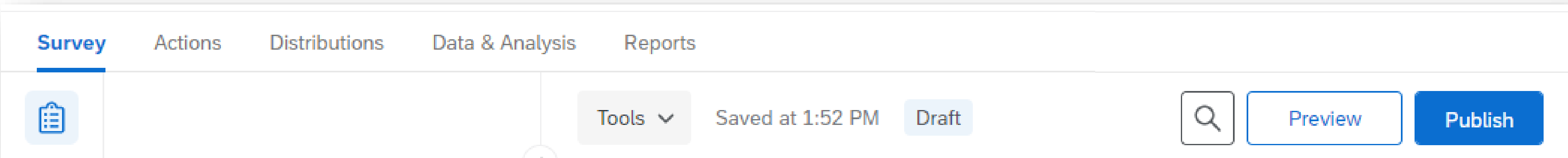
Publishing

Pressing **Preview** will always show you the most current version of your survey.

However, only when you press **Publish** will participants see those changes.

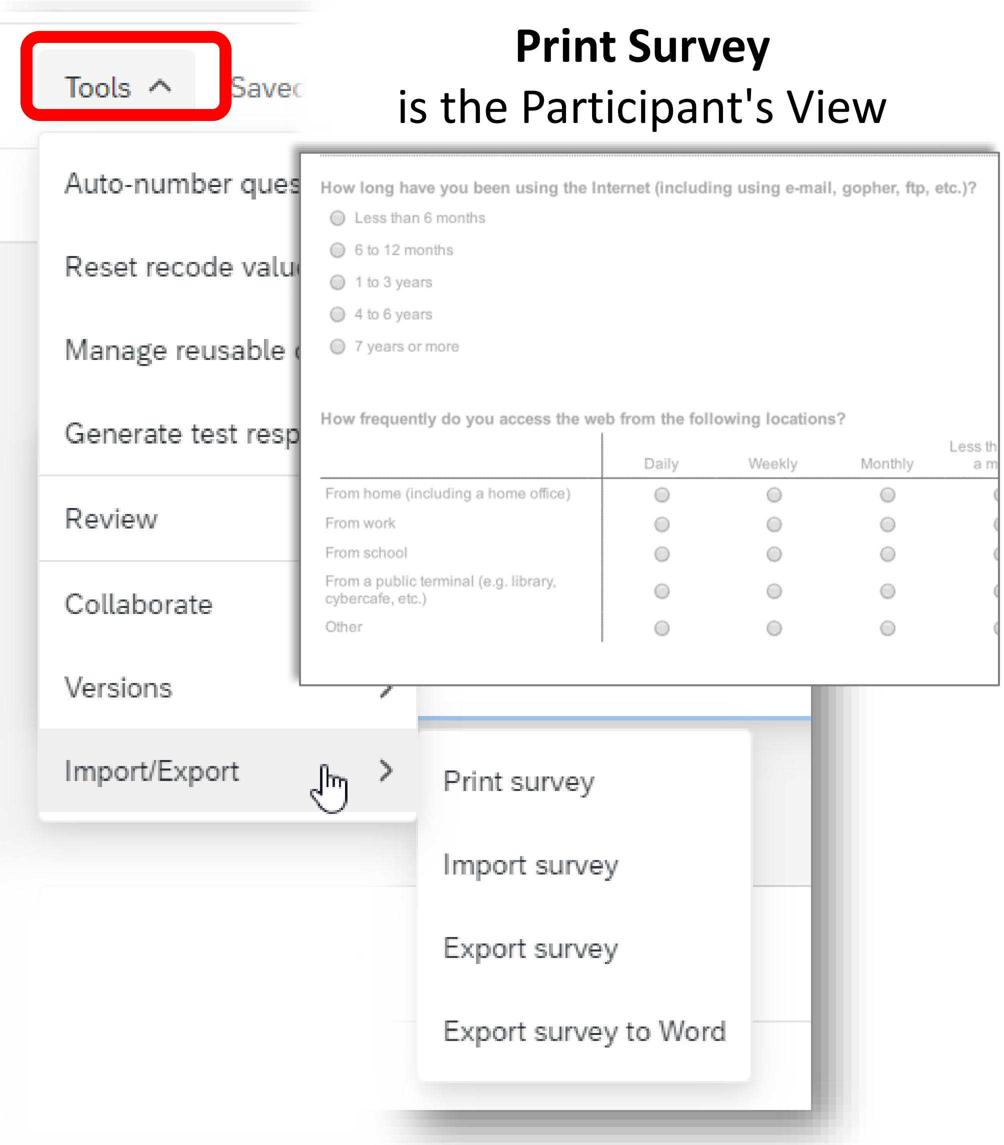
This lets you make changes to the survey in the middle of data collection.

If you must make changes at that point, always add new questions or answer choices and hide (but do not delete) those you do not want to show.

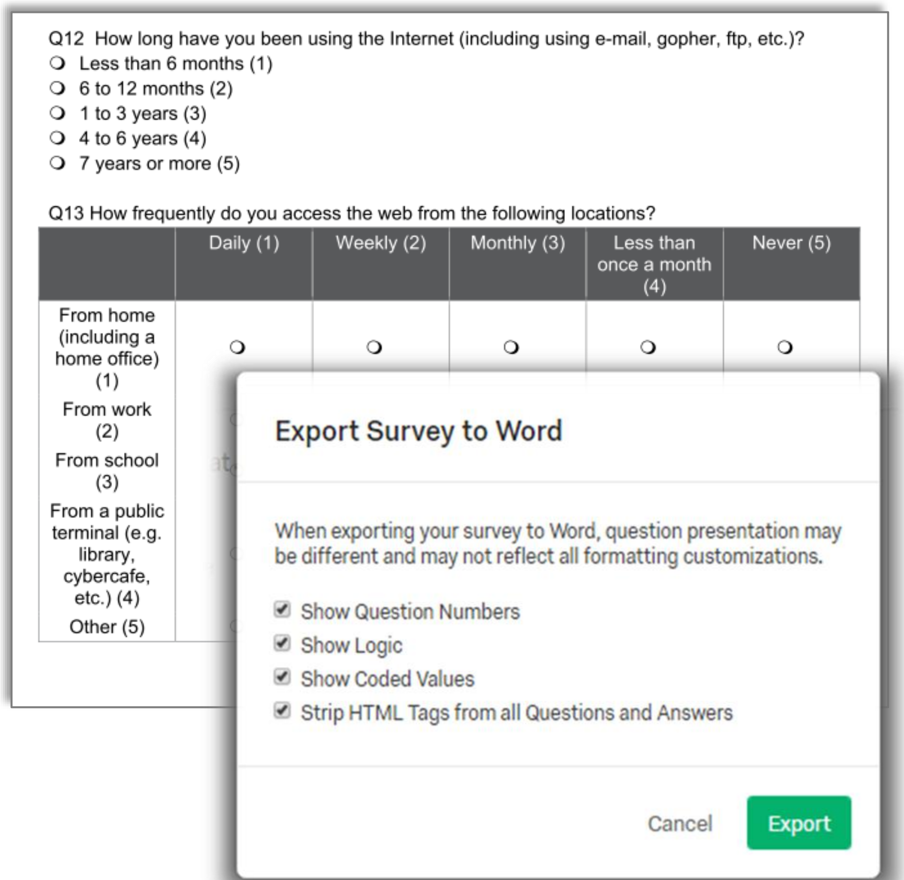


Making Paper Copies

Print Survey
is the Participant's View



Export Survey to Word
enables the Researchers View



https://www.qualtrics.com/support/survey-platform/survey-module/survey-tools/general-tools/print-survey/

The Participant Experience

Look & Usability

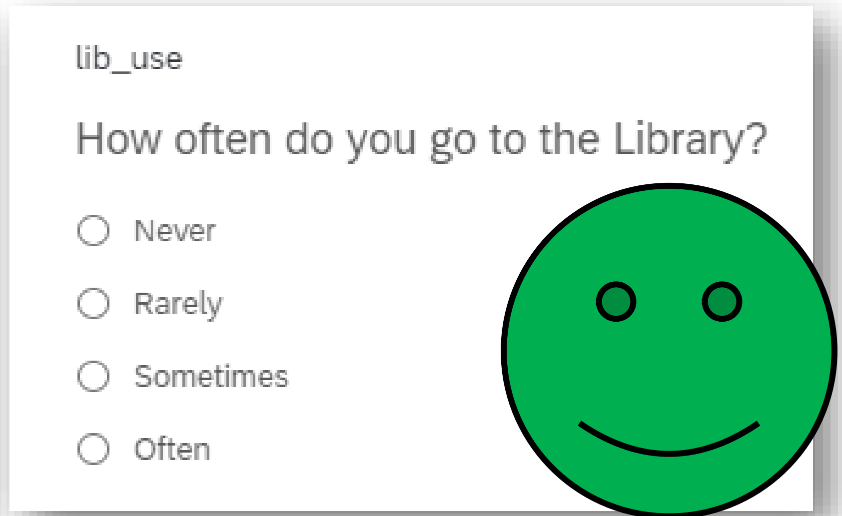
Label the right things

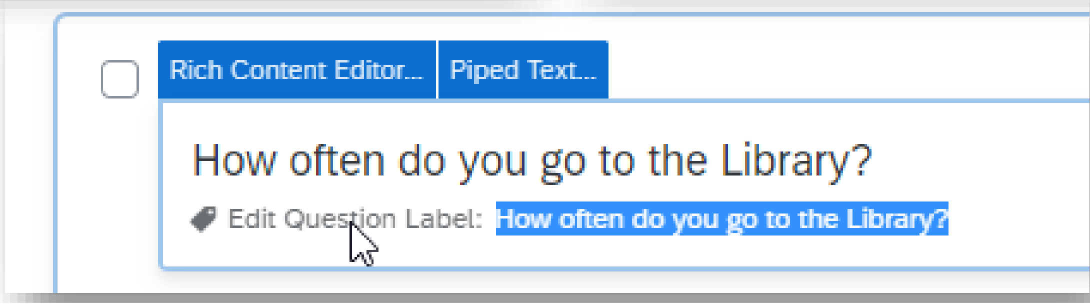
Do **NOT** number your questions. Participants don't care, and get sidetracked.

Do **NOT** number answer choices unless the numbers are relevant to the respondent.

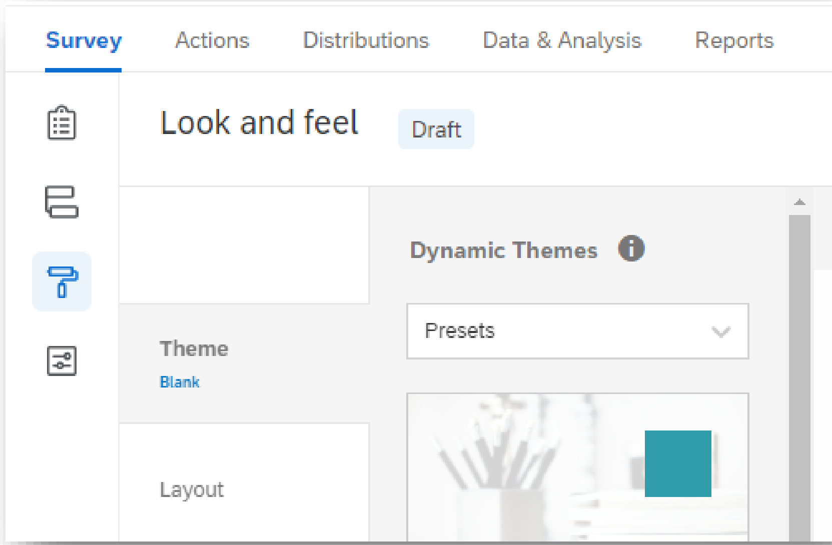
DO give each question a unique, useful, and uncomplicated name.

DO edit the question label to simplify if you will use statistical software for analysis.





Look & Feel - Themes



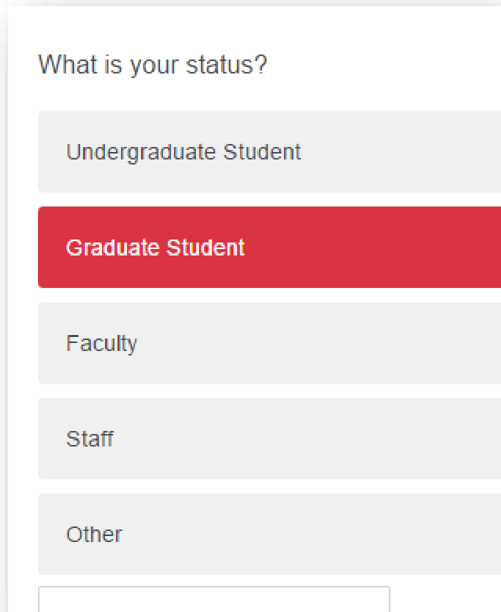
Both Qualtrics and your Organization may have Themes. Use the drop-down box to switch between them.

In the New Editor, decide on your overall look first.

Static themes do NOT let you change Layout, Style, Logo, Background, or Progress bar position. You can add custom CSS.

Dynamic themes allow you make many more changes easily.

You can also return to the **Old Editor**, which has a different set of options.



https://www.qualtrics.com/support/survey-platform/survey-module/look-feel/applying-survey-themes/

Look and Feel - Layout

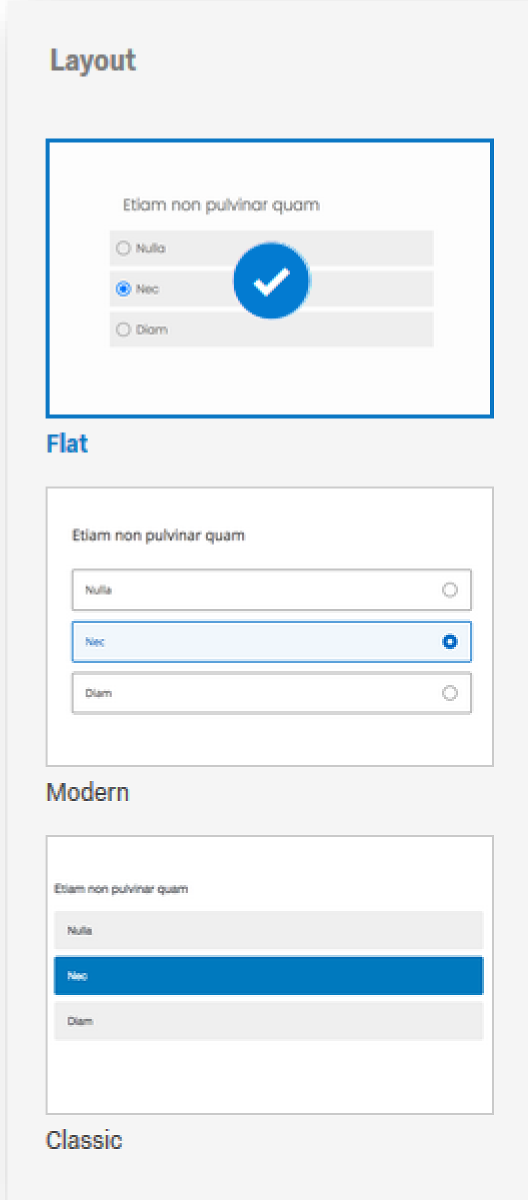
You can choose which layout best fits your questions.

The **Flat** style is the most traditional and avoids some potential issues.

The **Classic** layout does NOT visually distinguish between single and multiple response questions. If you use it, be sure to specify clearly in the question text how many options to pick.

With the **Modern** layout, less-experienced participants may not realize that they can click anywhere on the text to select a choice, which would make this type more difficult to answer.

You can change the look of questions even more by including Custom CSS in the Style section.

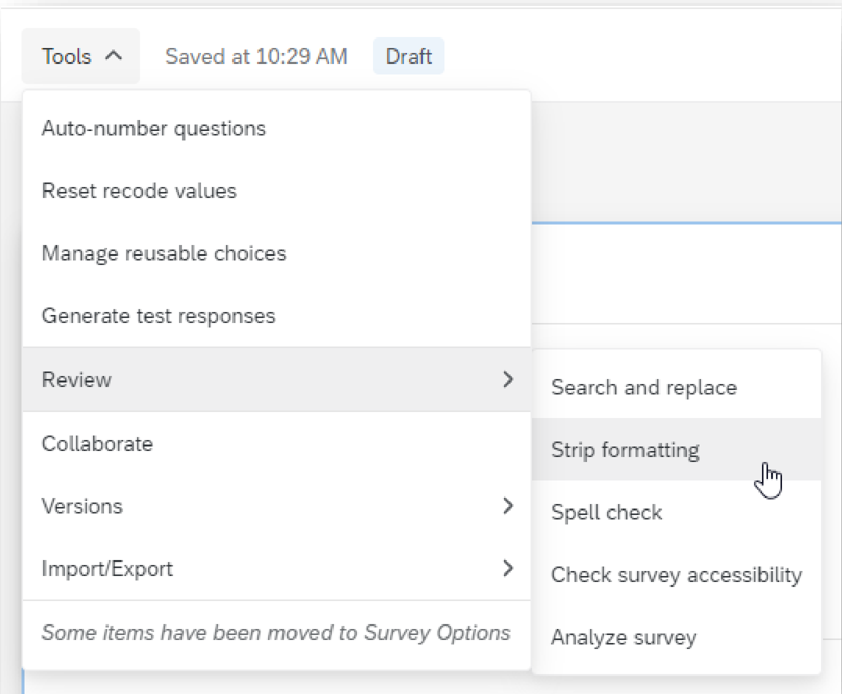


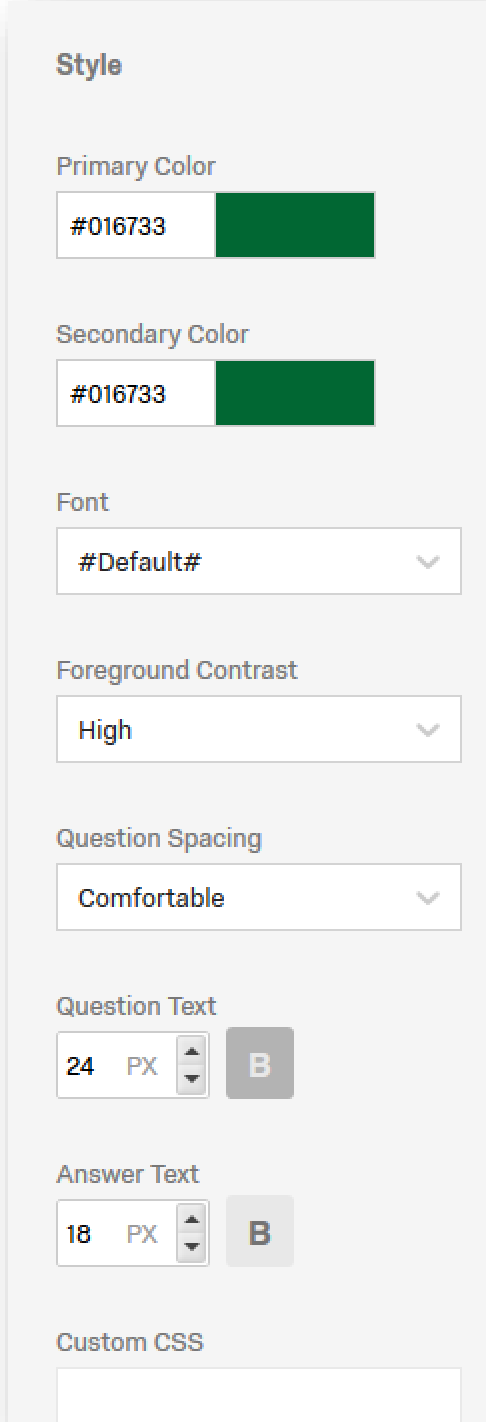
Look and Feel – Style

Do NOT use the **Rich Text Editor** to change the font or font size for entire questions.

Instead, use **Look and Feel.**

Strip formatting from selected questions to standardize.

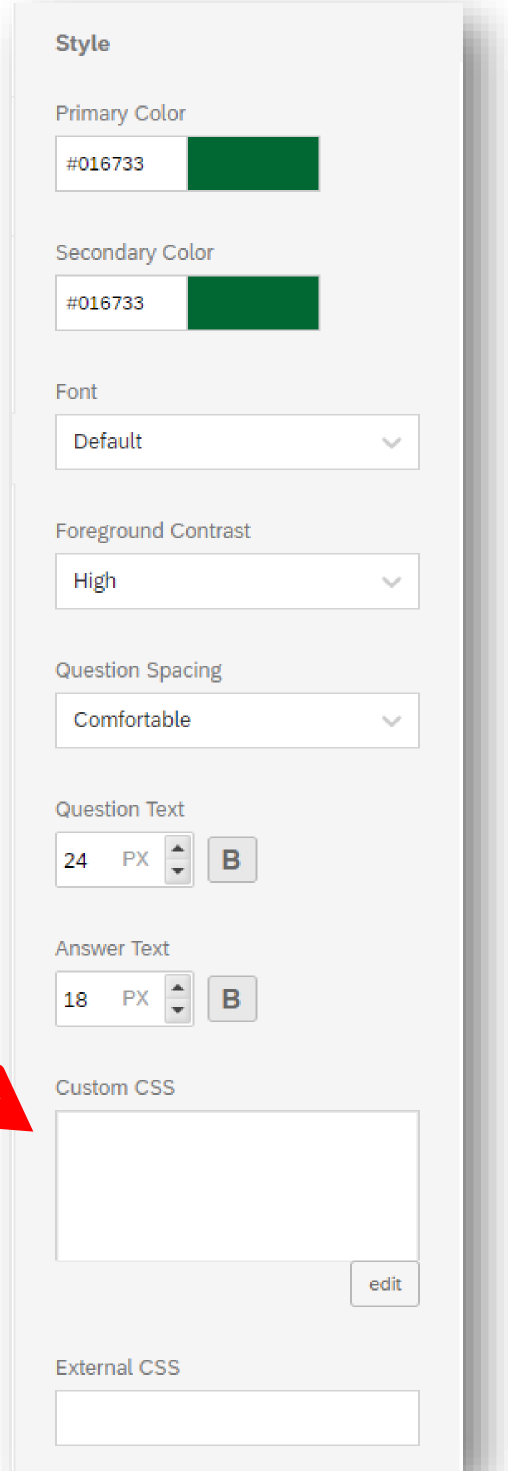




https://www.qualtrics.com/support/survey-platform/survey-module/look-feel/fonts-and-colors/

Look and Feel – CSS

You can also add **Custom CSS** to create classes and other elements for consistent styling.

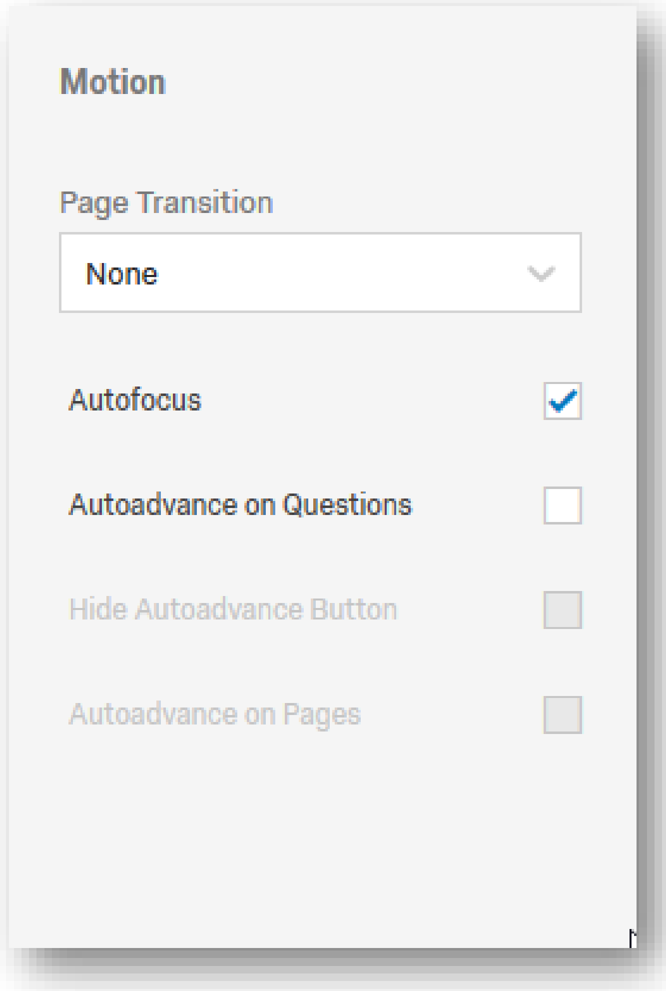


https://www.qualtrics.com/support/survey-platform/survey-module/look-feel/fonts-and-colors/

Look and Feel - Motion

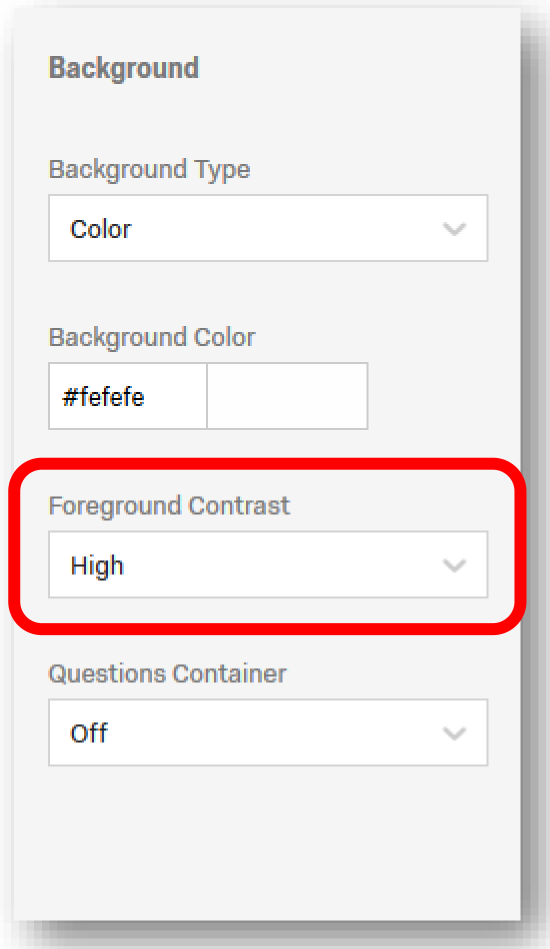
Autofocus may be useful by dimming . Since this is a new feature, it is unclear if it will be confusing for some participants. But, it is likely to help others.

Autoadvance may be useful in longer surveys with many simple, standard questions (such as experiments with many trials). Consider whether participants may unintentionally advance, and whether they are allowed and able to return to a previous page. If you have many skips, participants may not be able to return to a prior page.



Look and Feel - Logo & Background

The Logo and Background can affect participants perceptions of your credibility and reputability. It is important to maintain a professional look.



Use a **logo** if you are conducting a survey for an organization. Then, keep the background simple and neutral.

A **background** may be acceptable for more casual surveys to make participants feel happy, or match the theme of the questions.

If you will have older participants, or others with visual difficulties be sure to set the **Foreground Contrast** to High.

Looks Matter

- Use your organization's **template** if you are conducting an official survey
- Use **proper case**, not all caps or all lower case.
- Adjust length/height of **text boxes**
    - Helps participants determine what kind of information you are requesting.
    - If you have a really long box when requesting just a single number, people may think you need more
- Reduce **vertical space** where possible, adjust the margin in matrix tables

Why?

- It is like a **resume**. You are asking people to spend their time and energy on you.
- They care about **reputability**, **references**, and **attention to detail.**
- If your survey seems **important**, they will give truthful, thought-out responses.
- **Less overwhelming** surveys are more likely to be finished
- **Positive feelings** encourage completion

Organization & Flow

Best Practices: Question Ordering

- ✓ Start with an **easy**-to-answer, **interesting** question (i.e., not demographics)
- ✓ Keep related questions **together** and in a logical **progression** (ex. broad to narrow)
- ✓ Put **boring**, **difficult**, or **sensitive** questions at the end to avoid attrition, except if:
  - *Eligibility* - those who give certain answers need not finish the questionnaire
  - *Analysis* - it is crucial to your research and any data is useless without it
  - *Logic* - whether other questions should display depends on their answer
  - *Human Nature* - their answer might be affected by the previous questions

Recommended Block Structure:

1. Introduction / Informed Consent
2. Introductory Questions
3. *Group(s) of Related Questions*
4. Demographics
5. End of survey comments and appreciation

http://www.pewresearch.org/methodology/u-s-survey-research/questionnaire-design/

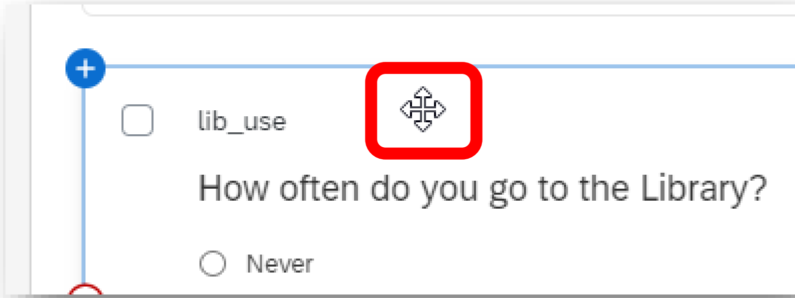
http://claudiaflowers.net/rsch8140/PrinciplesforConstructingWebSurveys.pdf

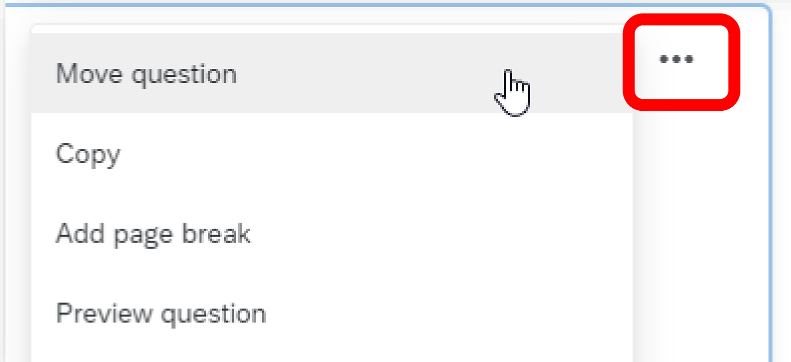
http://www.dataunitwales.gov.uk/SharedFiles/Download.aspx?pageid=30&fileid=27&mid=64

Moving Individual Questions

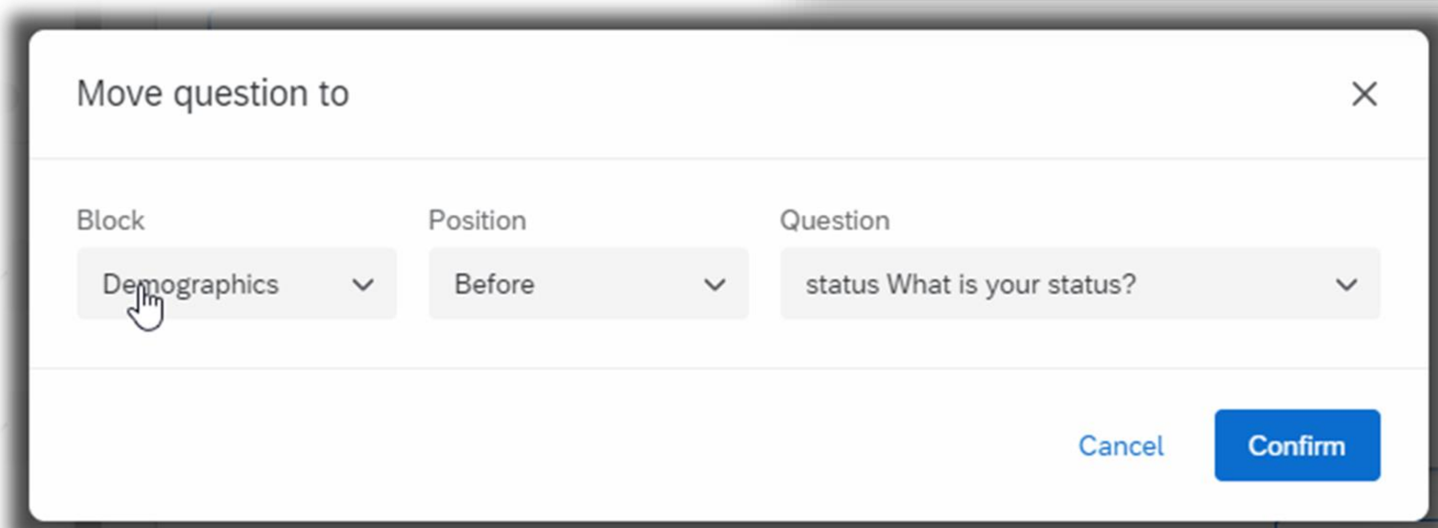
Use **drag-and-drop** for short-distance moves.

Use the **3-dots** for longer moves.



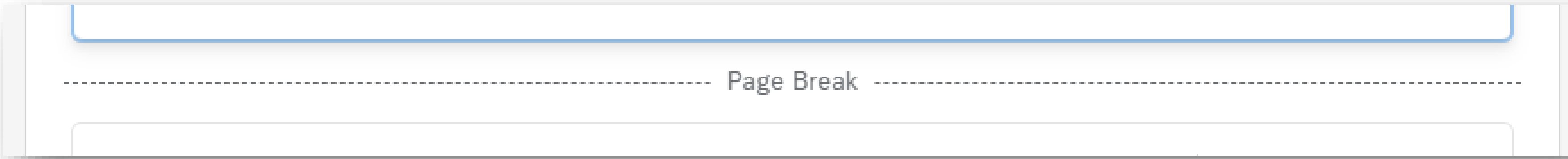


Use the checkboxes to select multiple questions before drag-and-dropping or using the move dialog box.

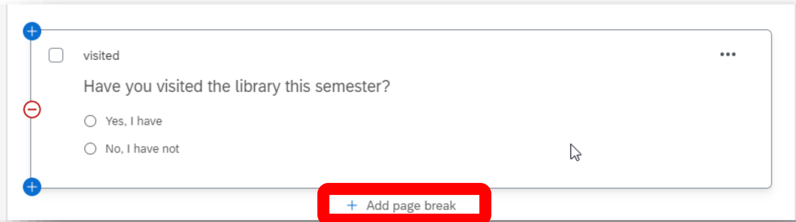


https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/creating-questions/#EditingMultipleQuestions

Page Breaks



In general, you should have **1-3 questions** per page.

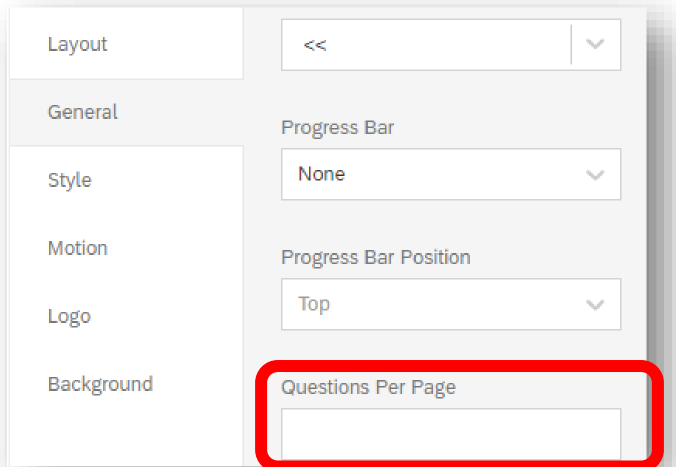


Why?

- ✓ Helps participants focus, less overwhelming
- ✓ It is too easy to skip a question when scrolling
- ✓ Answers are only saved when going to the next page.
  The browser could accidently get closed (or the power could go out).

How?

- ❑ Use **Blocks**. Adds a page break between.
- ❑ Hover to show "**Add Page Break**"
- ❑ Add after a question with the 3 dots
- ❑ Specify for the entire survey in **Look and Feel**
- ❑ Specify for a block in the **Block Options**
  Advanced Randomization

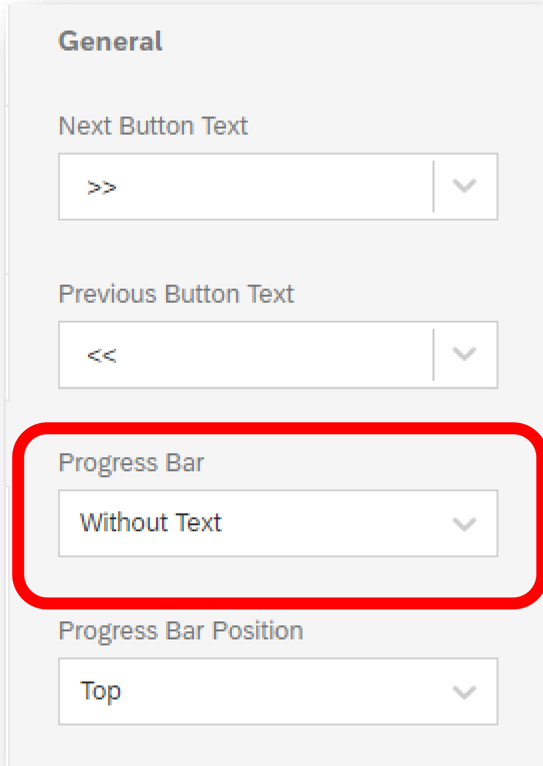


https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/add-page-break/

Progress

Encourage completion of the survey with little tweaks in the **Look & Feel** menu.

- Change the button text (e.g., “Next >>”)
- Add a Progress Bar



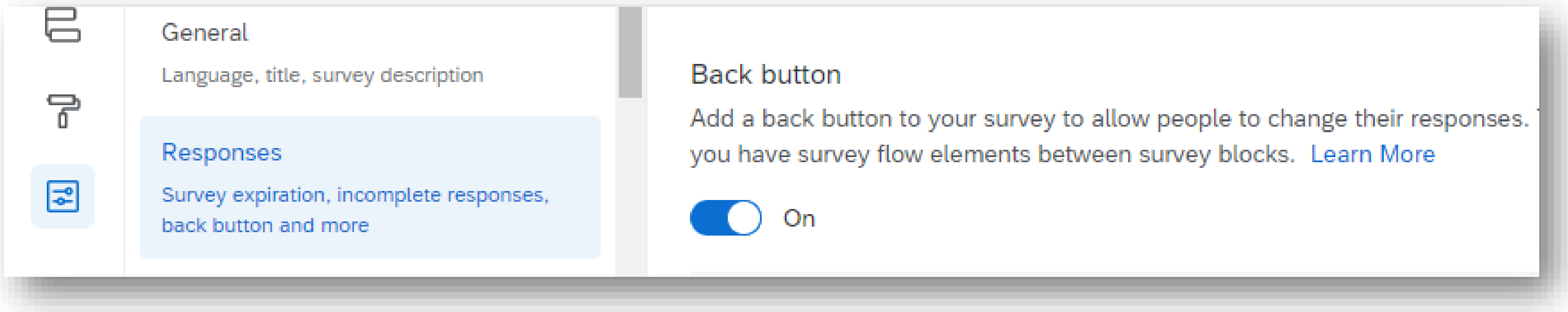
With Text

With Verbose Text

https://www.qualtrics.com/support/survey-platform/survey-module/look-feel/general-look-feel-settings/#AddingAProgressBar

Going Backward

In **Survey Options**, you can enable a **Back Button**



Enable the back button ***unless***:

- You are running an experiment and you need to control the experience
- You have many skips or branching logic

Do not ask or suggest that participants use the *back button* to review prior responses

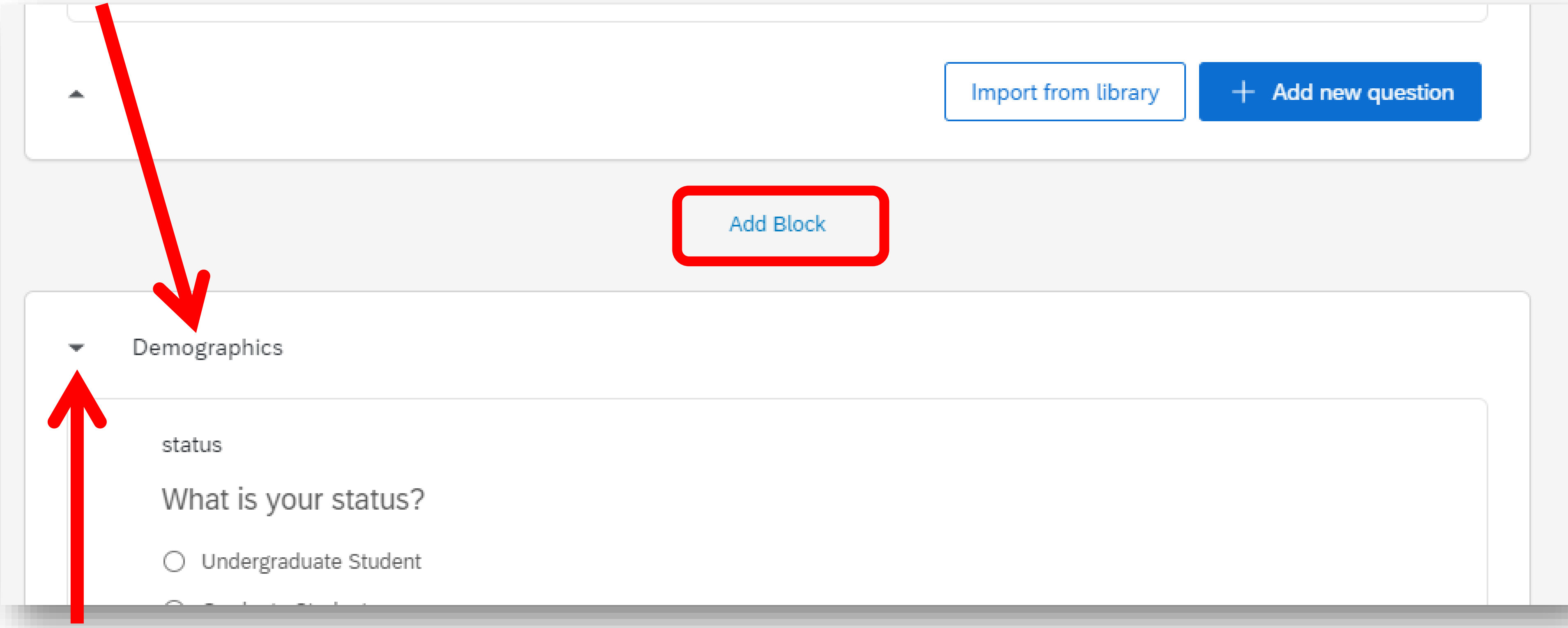
- If you want to remind participants of previous responses,
  use *Piped text* or *Carry Forward Choices* instead (discussed later)

https://www.qualtrics.com/support/survey-platform/survey-module/survey-options/survey-experience/#AddingABackButton

Blocks

Using Blocks

Use one **block** for each *topic*, *task* or *measure*.
Label your blocks by clicking the default name at the top and typing.
Labels do not appear to participants.



To more easily see the overall flow of your survey, minimize a block by clicking the arrow next to the name. Or, choose "Collapse Questions" from Block Options.

https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/standard-elements/show-block/

https://www.qualtrics.com/support/survey-platform/survey-module/block-options/block-options-overview/

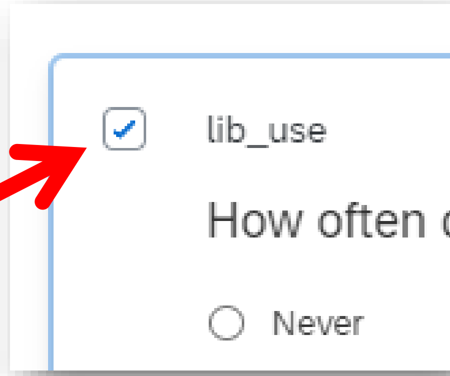
Quickly Grouping into Blocks

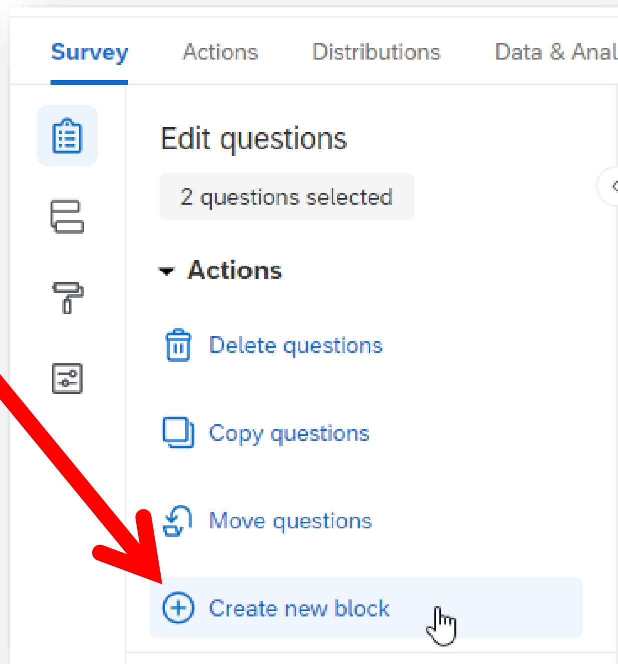
1. Click **anywhere** within the first question rectangle to select that question and **de-select** all others

2. Use the **checkbox** in the upper left (near the variable name) to select a second, third, etc. item.

3. With multiple questions selected, choose **Create new block**

4. Click anywhere within a question to clear the selection.

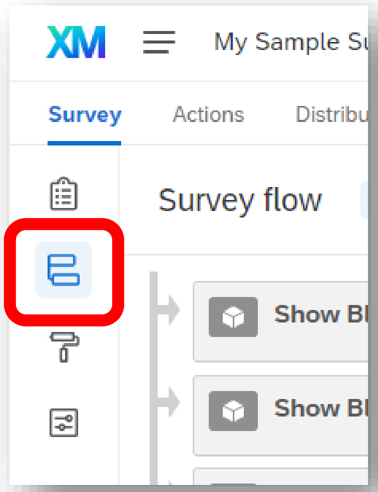




Using the *checkbox* is how you select **multiple questions**. So, get in the habit of just clicking *anywhere* to **select one**.

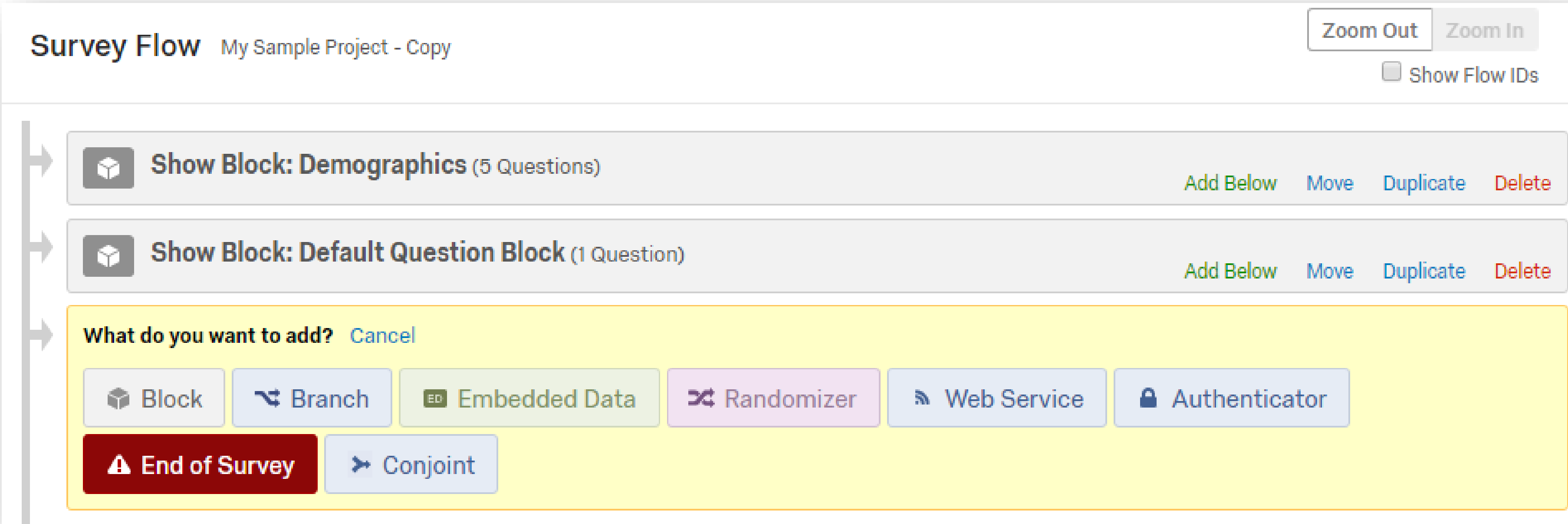
https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/creating-questions/#EditingMultipleQuestions

Survey Flow



Survey Flow shows the **overall order** of your survey by showing the blocks.

It also controls special features for blocks, like **Branch** and **Randomizer** (see later).

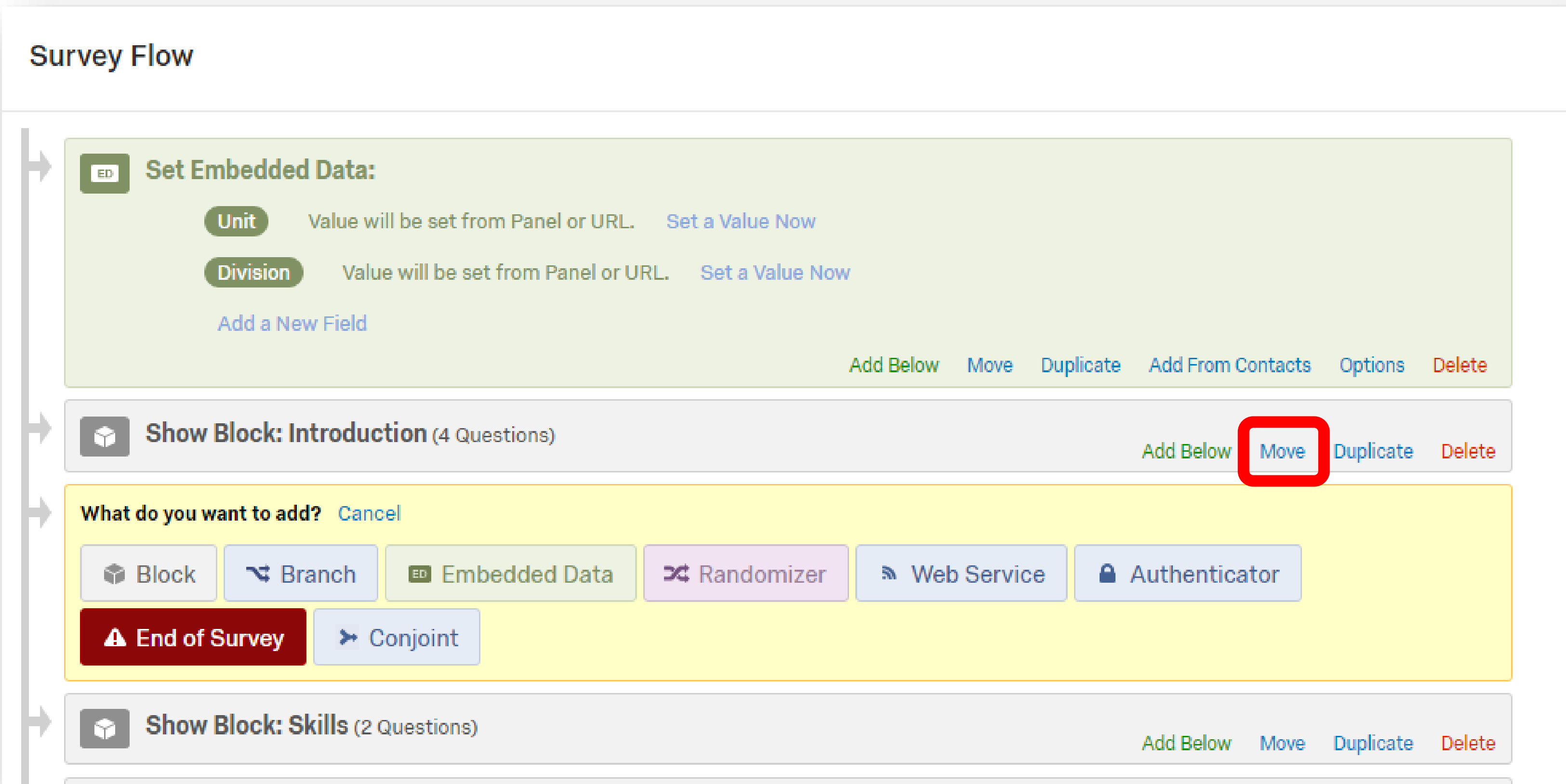


https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/survey-flow-overview/

Moving Blocks

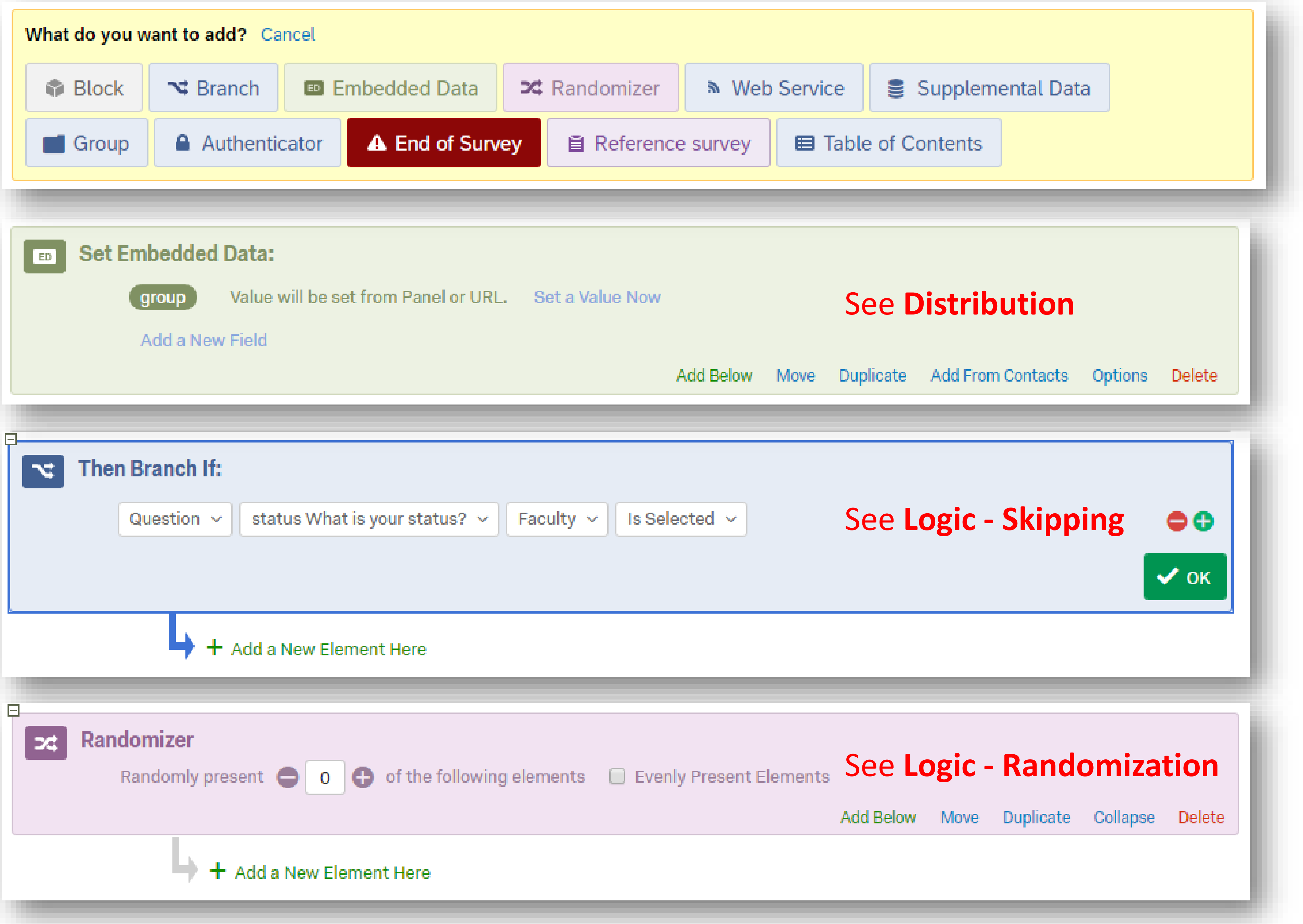
Block Options can move blocks up or down one spot. But, **Survey Flow** makes it easier.

Click and drag on top of the *word* **Move** until the green bar is in the location you want.



https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/survey-flow-overview/#MovingElements

Survey Flow Elements



Logic

Custom Survey Paths

Logic Overview

Logic refers to any survey flow actions which are based on rules or conditions. Thus, the experience of a survey can be changed for participants either *randomly* or depending on their *responses* or characteristics.

Randomization

Randomly choose which survey elements to display

Randomly order the displayed survey elements

Skipping or Holding

Display or not display questions based on prior responses

Prevent respondents from moving on if their response is invalid → See **Validation**

Repetition

Display the same choices or questions a variable number of times

Simplify the back end by repeating 1 or more questions a specific number of times

https://www.qualtrics.com/support/survey-platform/survey-module/more-survey-module/using-logic/

Logic - Randomization

Randomization & Experiments

Why use Randomization?

- Randomizing **order** can help correct for bias and human tendencies
  - For questions: answers may be affected by questions asked previously
  - For answer choices: people tend to pick the first answer choice. Only use this if there is **no** logical order for the answers.
- Randomizing **display** is done to improve generalization (for questions only)
  - To run an experiment and show people different things
  - The survey is really long and you don't need all the data from each person. Randomly selecting the display helps retain a representative sample for each individual question.

You can randomly *order* OR *display*:

- **Blocks** within a Survey: *Survey Flow Randomizer*
- **Questions** within Blocks: *Question Randomization* in Block Options
  - To randomly display one question, use *Advanced Randomization*
- **Answer Choices** within Questions: *Choice Randomization* in Question Options

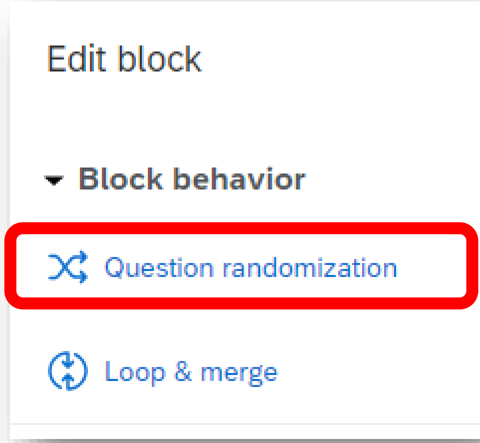
https://www.randomizer.org/links/

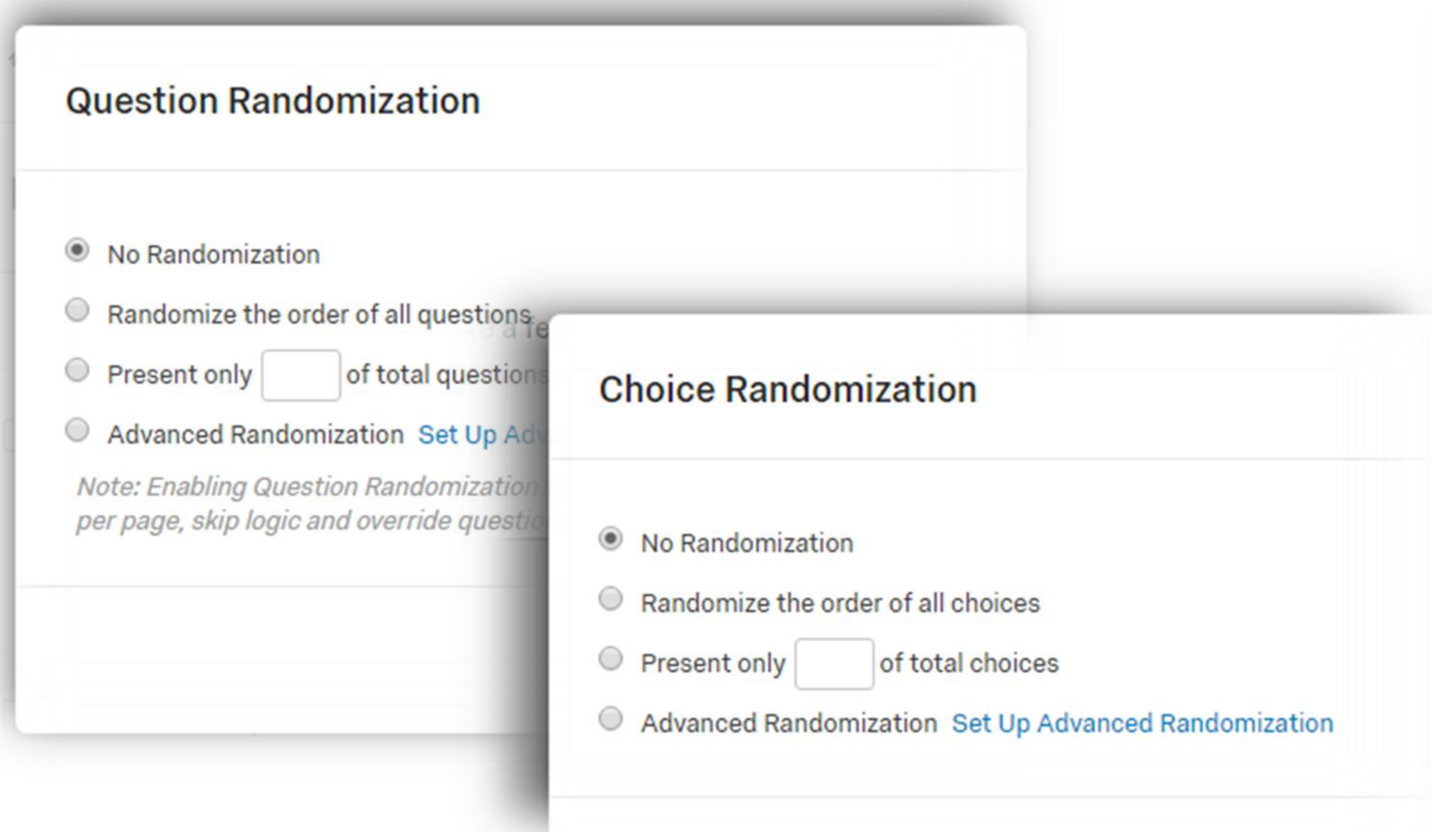
Answers & Questions

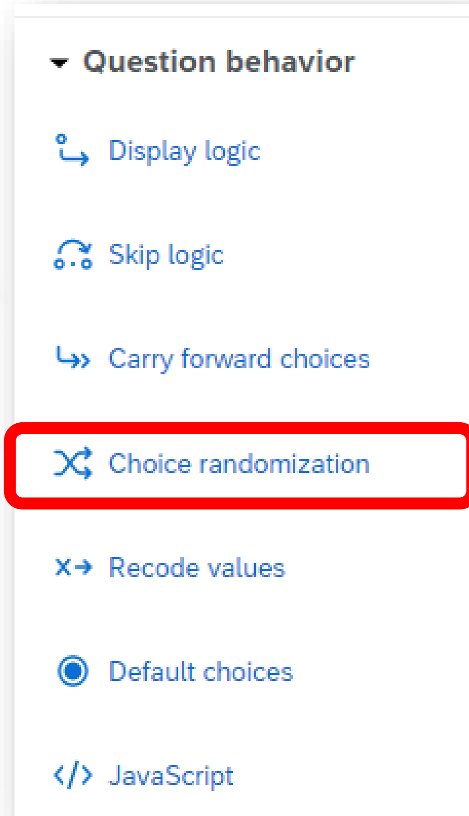
Answers within a Question = **Choice** Randomization

Questions within a Block = **Question** Randomization

Use Advanced Randomization to specify both **order** and **selection**.





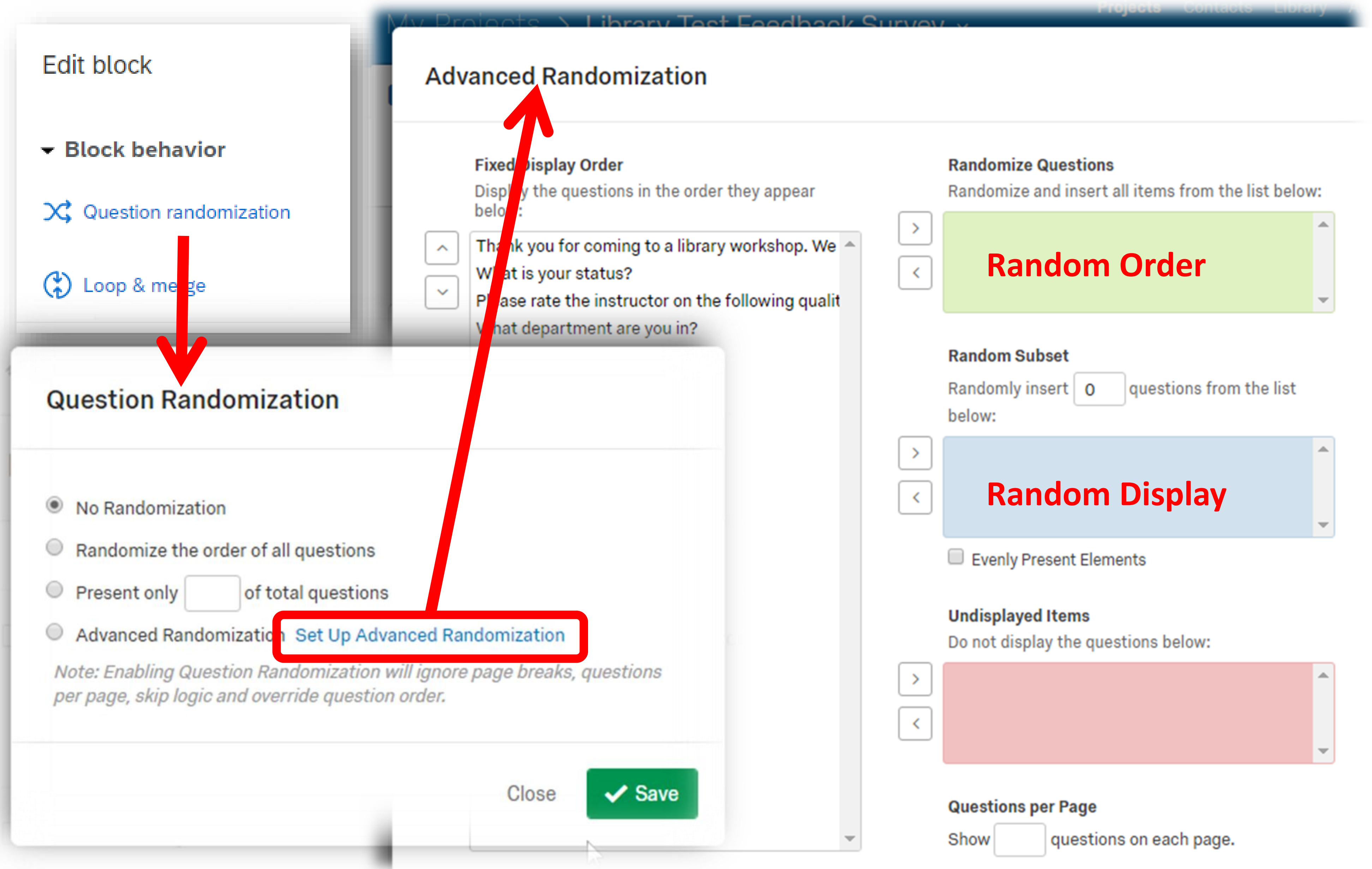


https://www.qualtrics.com/support/survey-platform/survey-module/block-options/question-randomization/

https://www.qualtrics.com/support/survey-platform/survey-module/question-options/choice-randomization/

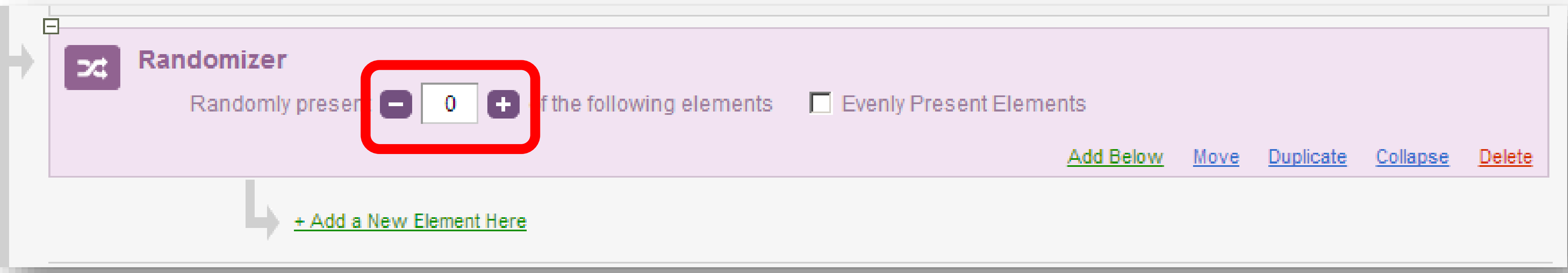
Advanced Randomization

Questions within a block



Survey Flow Randomizer

Blocks within a survey



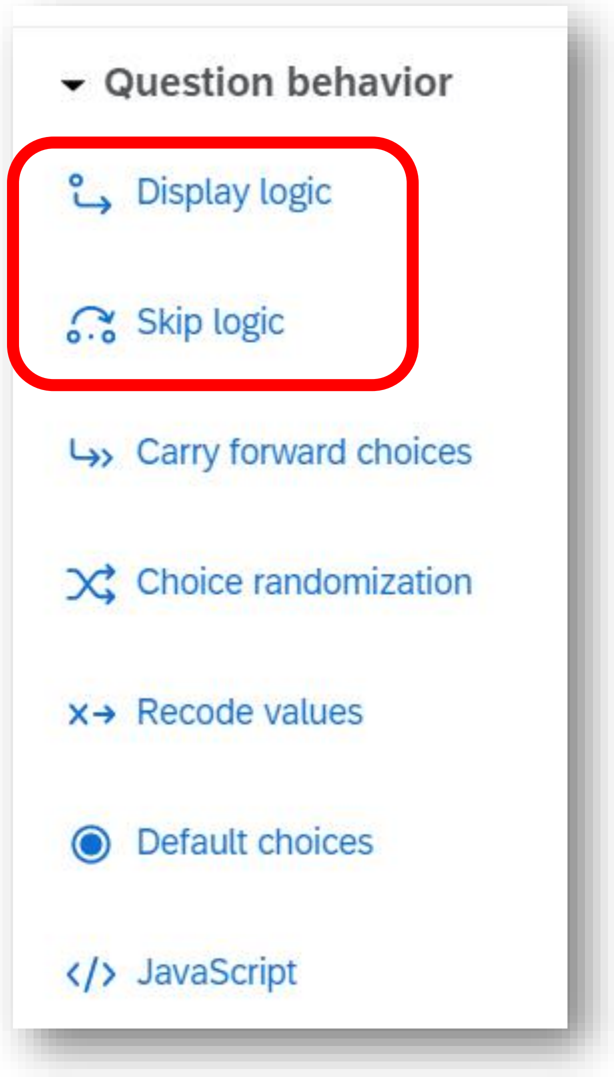
Randomly Order: Put all the blocks involved inside the randomizer, and set the number of blocks to present ***equal*** to the total number of blocks.

Randomly Display: Put all the blocks to choose from insider the randomizer, and set the number of elements presented to 1.

Evenly Present means to rotate the presentation of elements so it is always equal. Otherwise, it will use a random number generator. This is more random but less equal.

https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/standard-elements/randomizer/

Logic – Skipping



Which Logic to Use?

Skip logic is for *screening* questions.

- Skip to the **end of the survey** if a respondent is not eligible or done with questions
- Skip to the **end of a block** if the rest of the questions in the block are not relevant.
- Use Skip Logic *only* if:
  - You need to skip over *multiple* questions based on the answer to *one* question
  - You are skipping to the *end of a block* or the *end of the survey*

  Otherwise, there will be problems with skipping if you rearrange your questions.

Display Logic is the primary logic, which displays a question *only* if the criteria is *true*.

- **Branch Logic** is Display Logic for entire *blocks* of questions
- If your logic is based on answers to *more than one* question, you *must* use this.

The same outcome can be achieved using different kinds of logic.

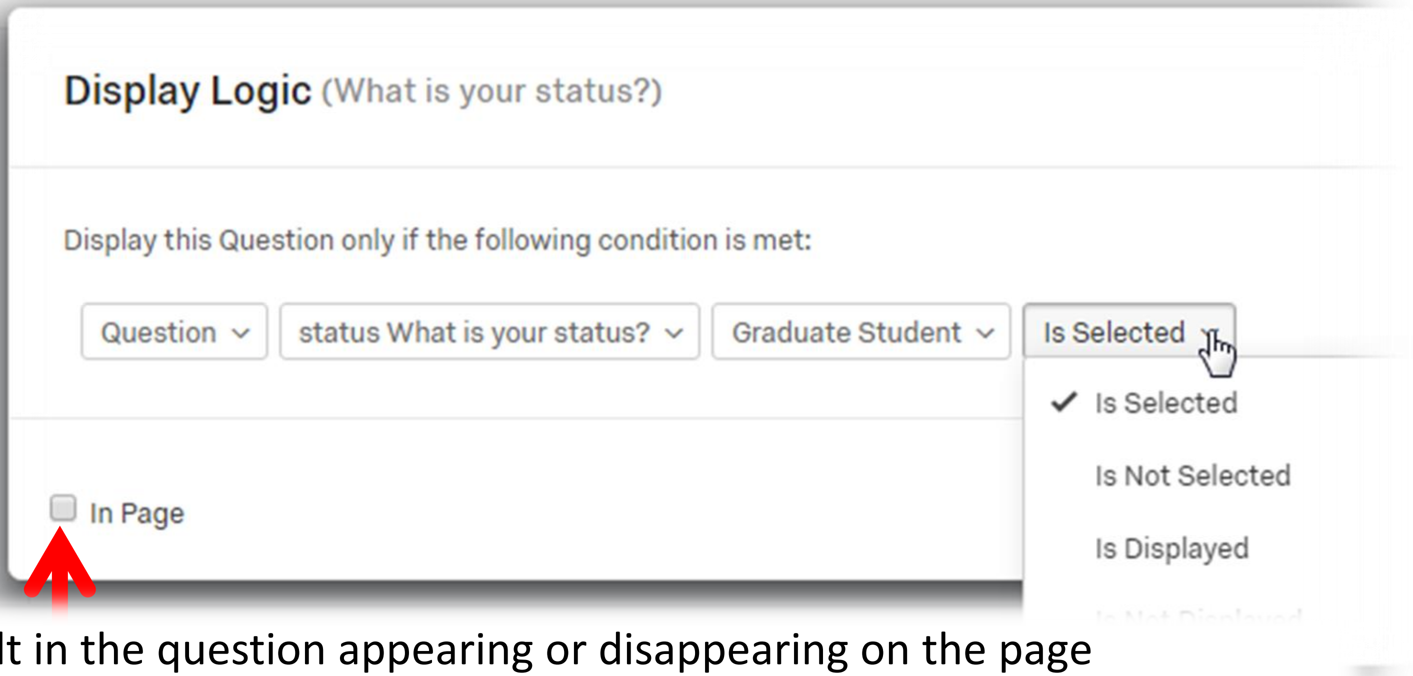
https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/standard-elements/branch-logic/

Display Logic

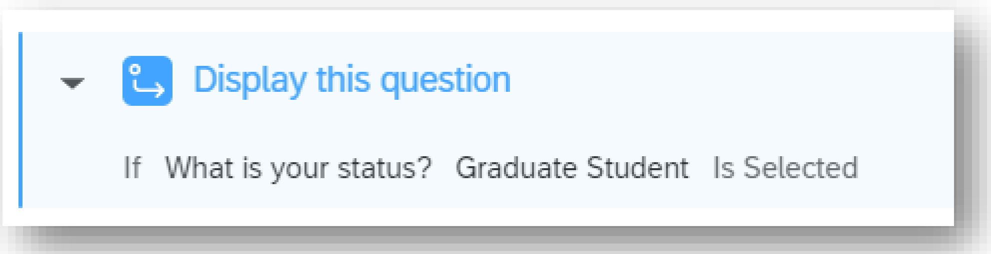
This is the most flexible because it is evaluated **before** something displays (should it?)

It works for:

- questions
- response choices
- matrix rows



Checking **In Page** will result in the question appearing or disappearing on the page immediately when the respondent chooses particular answers,. This can clarify some questions and allow several easier questions to substitute for a more difficult one. But, it can also encourage the respondent to select the option with fewer questions.

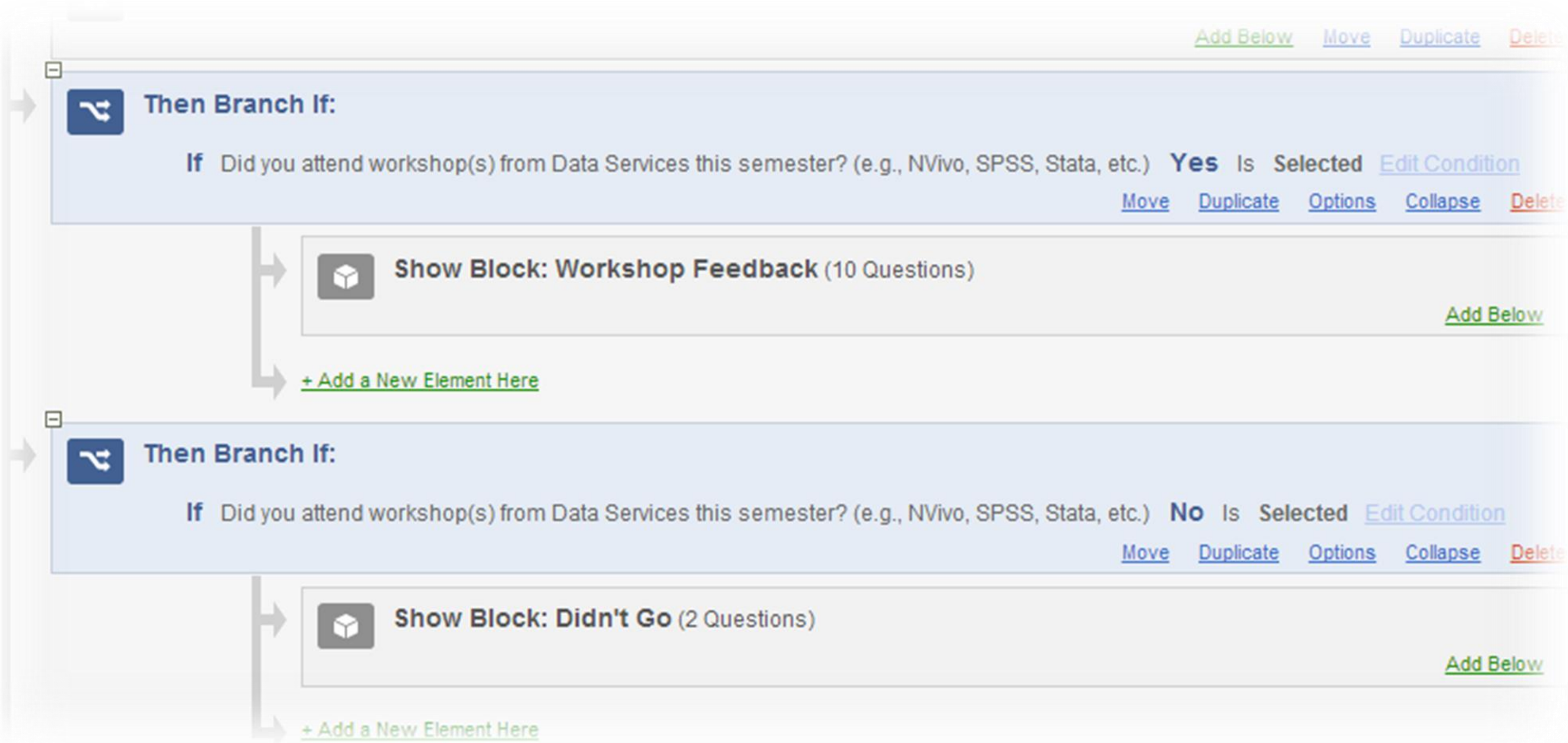


https://www.qualtrics.com/support/survey-platform/survey-module/question-options/display-logic/

Branch Logic

This is the same as Display Logic, but for blocks of questions. Use **Survey Flow**.

A **Branch** allows you to set the conditions under which to show one or more blocks. Use the "Move" link to drag the block(s) inside the branch element.



https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/standard-elements/branch-logic/

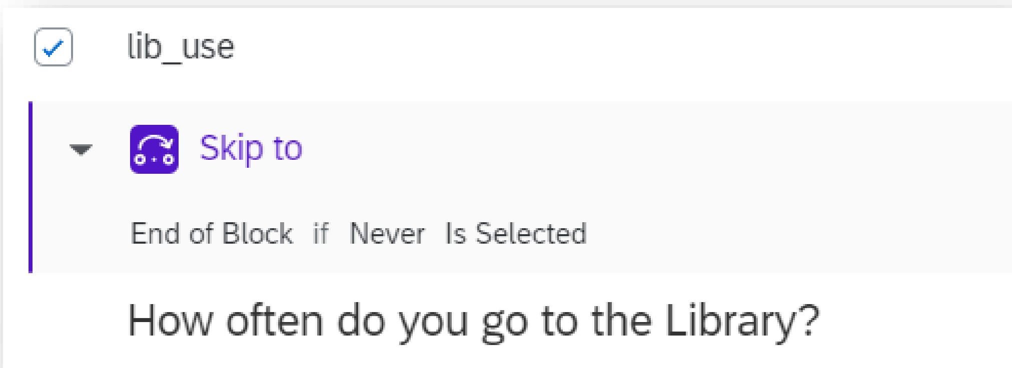
Skip Logic

The least flexible logic because it is based on the answer to only ***one*** question.

It is evaluated ***after*** that question (where to go now?). You must choose the specific question to go **to**. If you just intend to skip ***over*** some question, use Display Logic.

Skip Logic is useful for **screening** questions. Use Skip Logic ***ONLY*** to:

- Skip to the **end of a block.** Start a block with a screening question so the respondent can go to the next block if the rest of the questions are not relevant.
- Skip to the **end of the survey**. Start the survey with screening questions so you can skip to end the survey if the respondent is not eligible or needed.



https://www.qualtrics.com/support/survey-platform/survey-module/question-options/skip-logic/

Logic - Repetition

Carry Forward Options

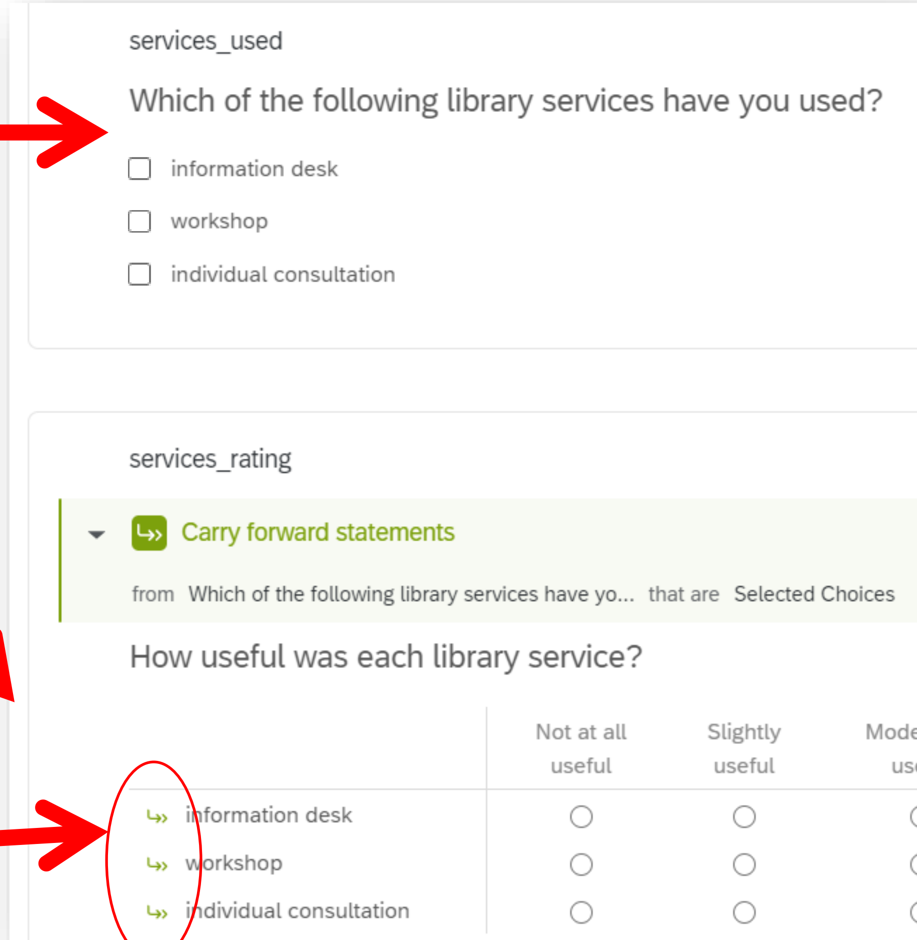
Ask about answer choices that were either selected or unselected in a prior question.

Choose to carry forward "Selected Choices" from the earlier question.
Or, follow up about Unselected Choices, like "Why didn't you use it?"

1. Use a Multiple Answer question and type in all possible answer choices.

2. Add "Carry Forward…" to the follow-up question

3. Do NOT type these in. They will automatically appear, and ONLY those that meet the criteria will show.



https://www.qualtrics.com/support/survey-platform/survey-module/question-options/carry-forward-choices/

Loop & Merge – What is it?

Ask follow up questions about **each choice** previously selected

- Person selects which options are relevant
- Loop for each relevant option (ignoring irrelevant ones)

Example:

1. Which of these have you done?

2 a. What was the best part?

b. What was the worst part?

c. What would you change?

Ask about each one selected

Ask questions about **each item** in a list

- Person indicates how many
- Loop that many times

Example:

1. How many children do you have?

2 a. Gender

b. Age

c. Grade in school

Ask specified # of times

Loop through each element of a pre-existing list

This avoids duplicating questions to see a surveys structure clearly and more easily make changes.

Example:

1 a. Have you heard of it?

b. Are you interested?

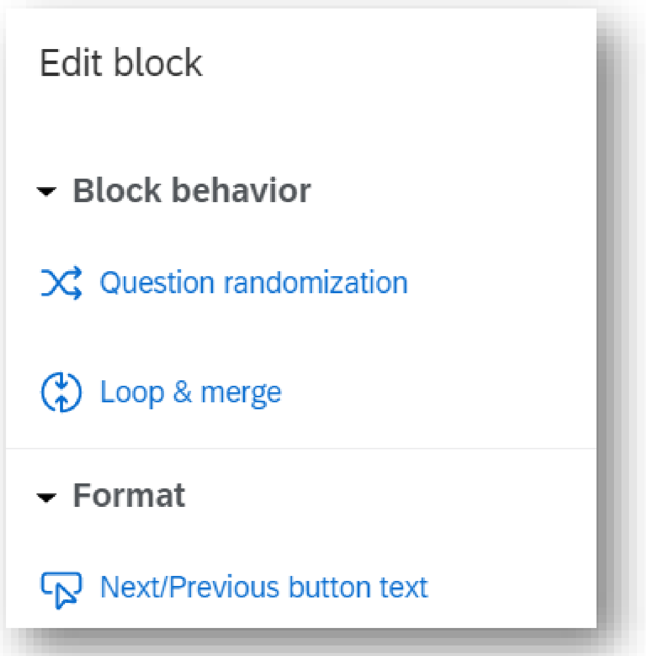
c. What would you pay?

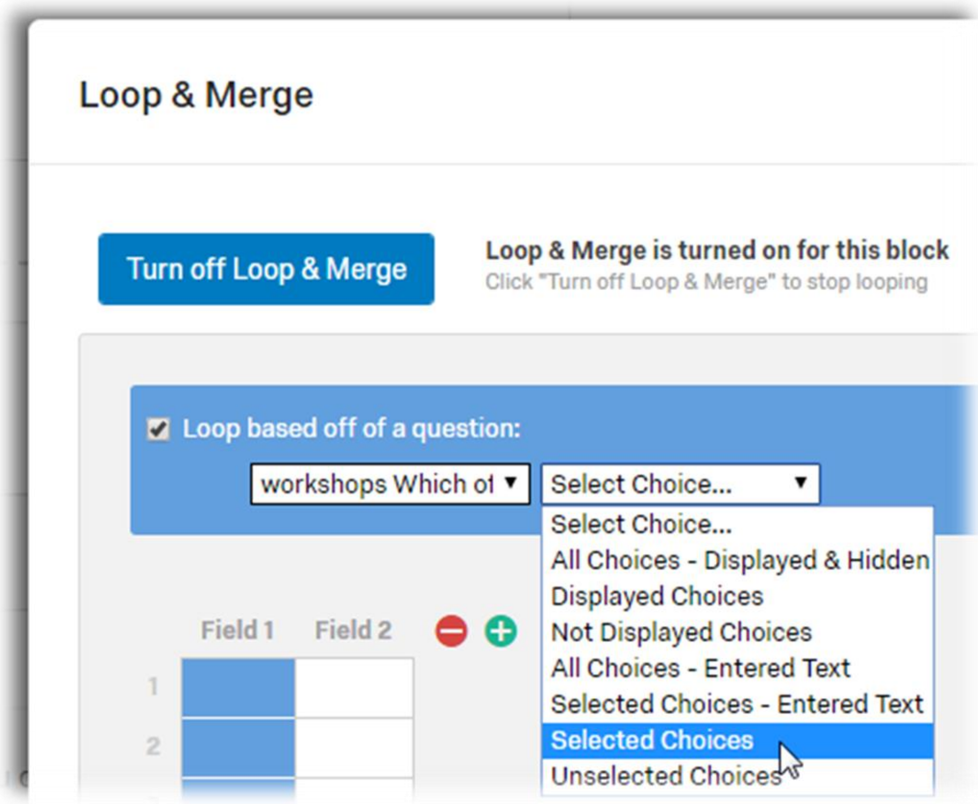
Ask about each one

https://www.qualtrics.com/support/survey-platform/survey-module/block-options/loop-and-merge/

Loop & Merge – How to

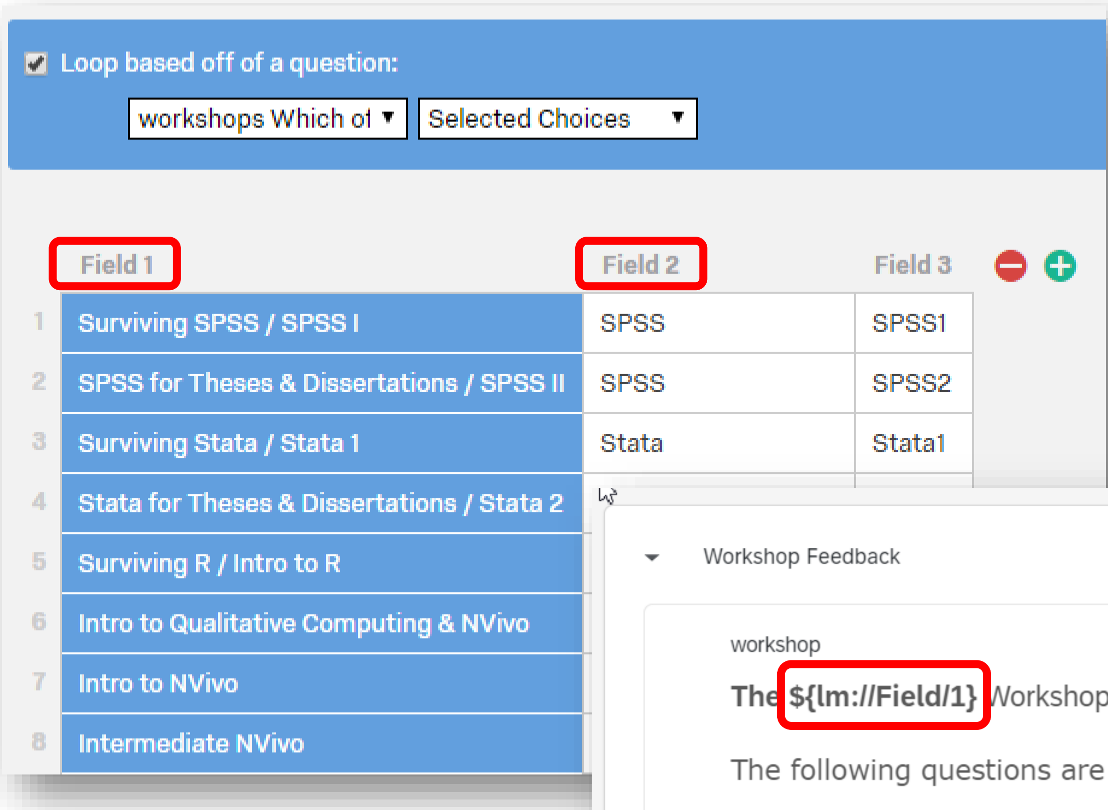
1. Create a block for the questions that will be repeated
2. With the block selected, choose Loop & Merge on the left and **Turn it on**
3. If needed, choose the question that has:
   - the selected or unselected choices to loop through and ask about
   - the value representing the number of times to loop

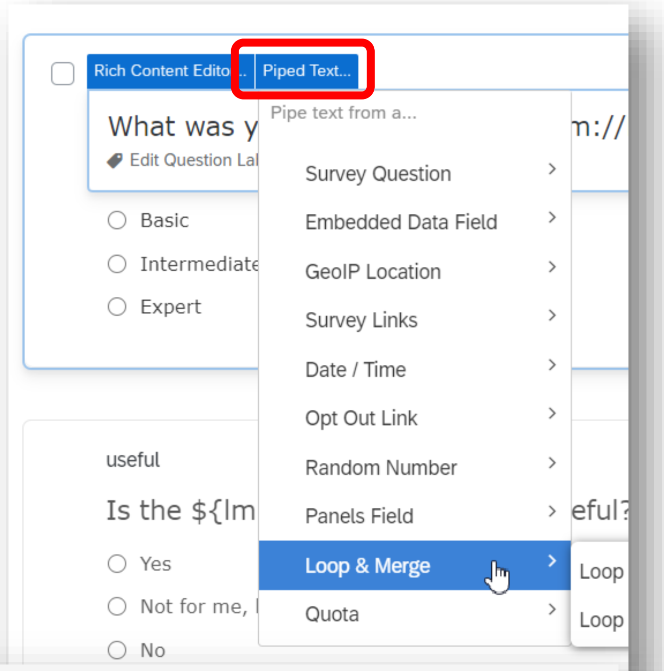


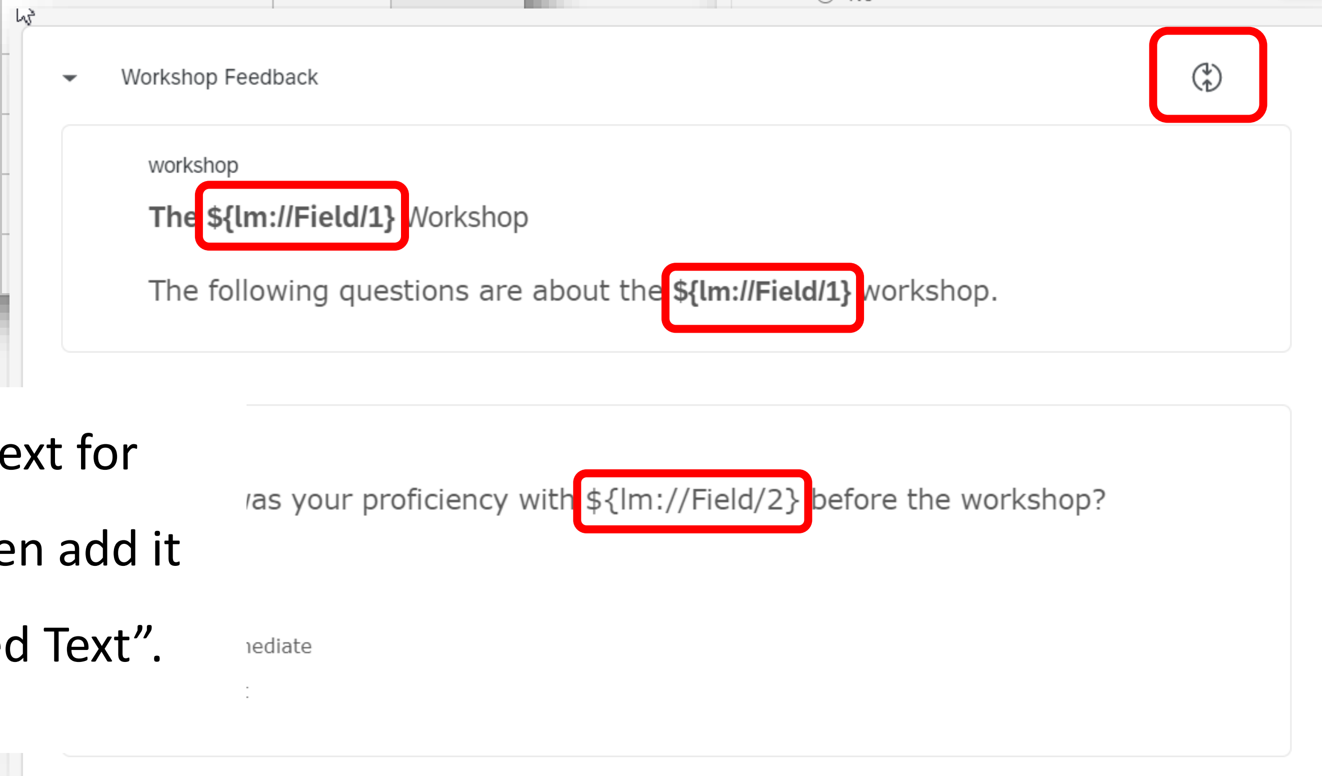


https://www.qualtrics.com/support/survey-platform/survey-module/block-options/loop-and-merge/

Loop & Merge – Piped Text







You can specify different text for each possible loop and then add it to your survey using "Piped Text".

https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/piped-text/piped-text-overview/#PipingFromALoopAndMergeField

Creating Questions

Best Practices: Writing Questions

These are the steps respondents must go through to answer your questions.
Easing this process improves data quality and avoids missing values.

Comprehension
of the question

Understand the concepts, intent, and context, of the question.

Unambiguous & direct language is good for all.

Retrieval
of information

Search memory or knowledge for facts or opinions.

Recalling when or how many times things happened is difficult.

Judgement
and estimation

Integrate the information for judgement.

Must judge it is safe to provide answers that are socially sensitive.

Reporting
an answer

Translate mental information to the given options.

It is difficult to pick from many options or make fine distinctions.

https://iriss.stanford.edu/sites/default/files/questionnaire_design_1.pdf

Questions vary on…

Difficulty

- **Easy** – Clear, one-topic question using simple words and grammar in which the respondent immediately recognizes the appropriate answer
- **Impossible** - A question that either doesn't apply to the respondent, or doesn't have an appropriate answer choice. May prompt them to leave.

→ ***Note***: A single difficult question may take *longer* to answer then several easy questions that elicit the same information. More questions isn't always bad.

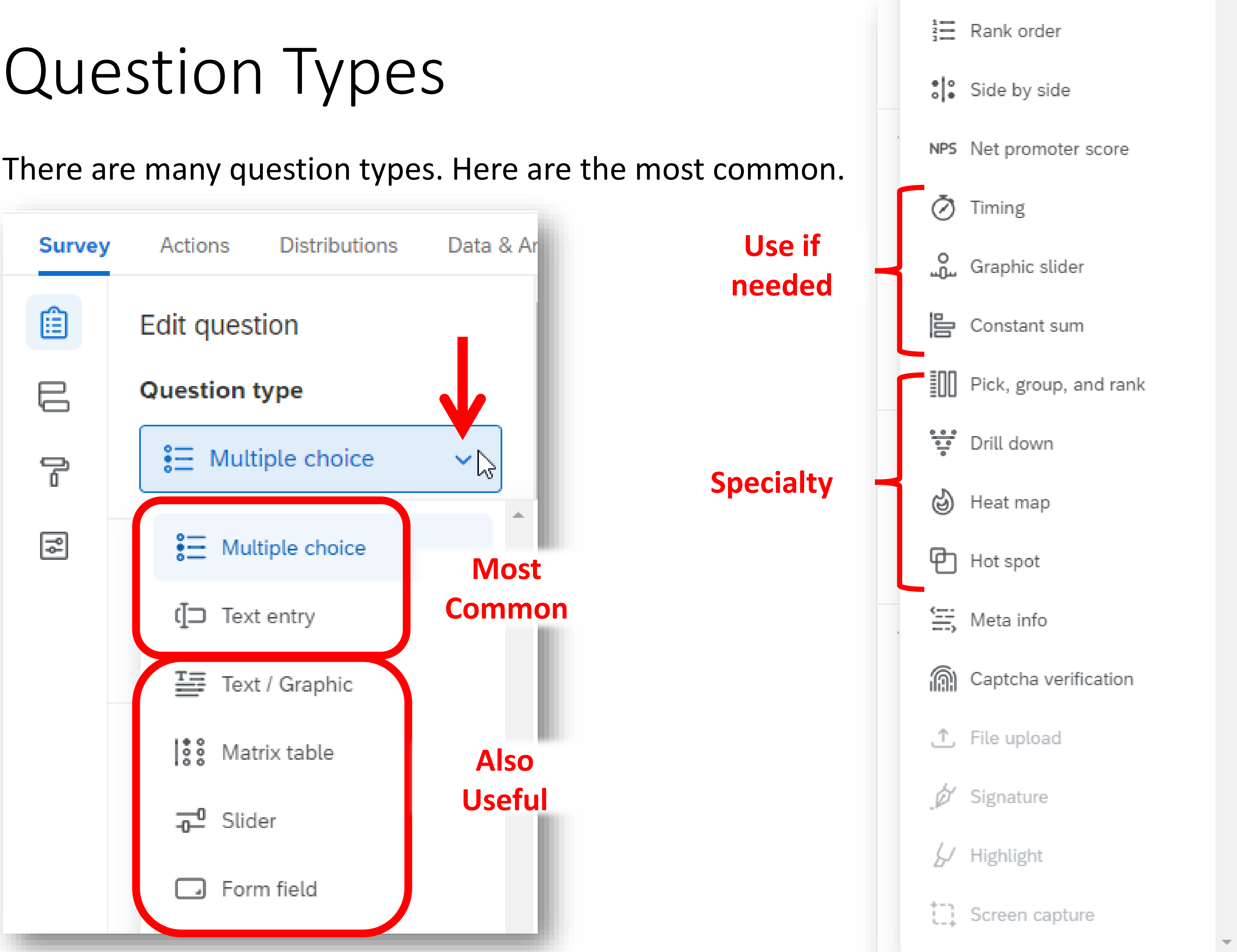
Interest

- **Boring** - Routine questions, like demographics, that have automatic responses
- **Sensitive** - People will often find these interesting, but only if they are assured of anonymity or confidentiality and believe they will not be judged. If there is any possibility these could be seen as threatening, put them later.

→ ***Note***: A large number of otherwise-interesting questions with the same response structure (e.g., yes/no, true/false, likert) can end up being boring.

Question Types

There are many question types. Here are the most common.



https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/question-types-overview/

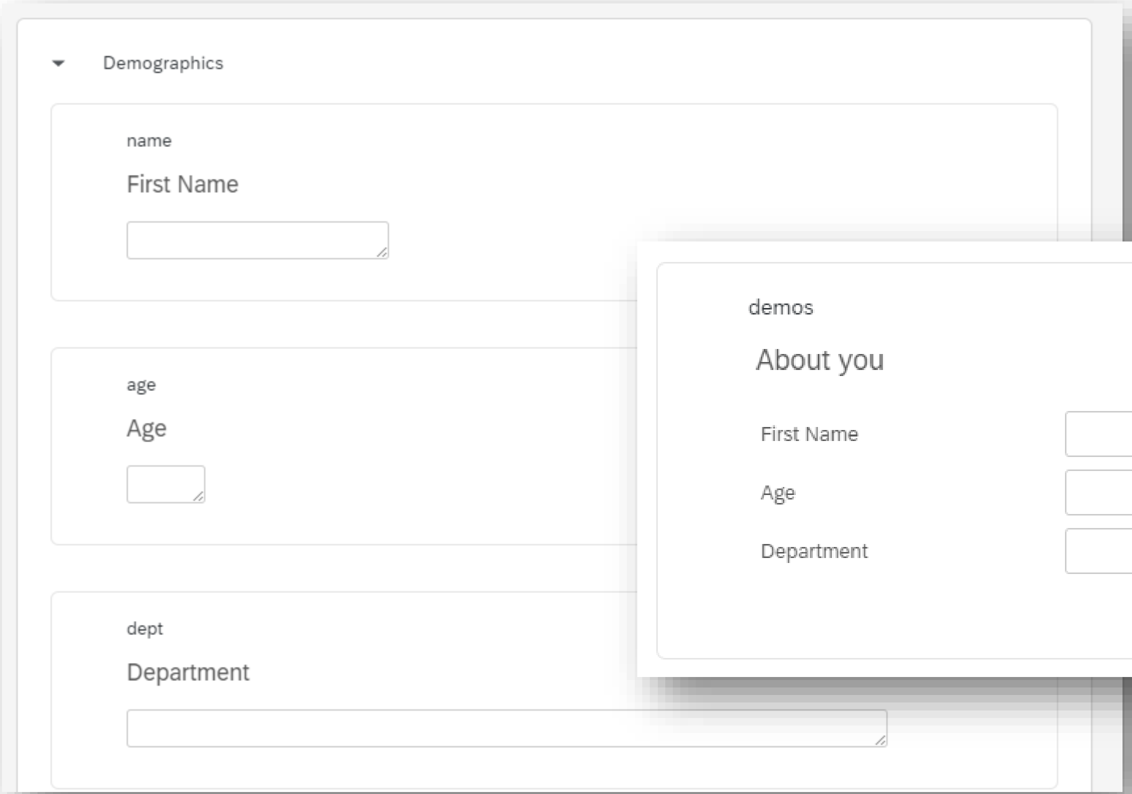
Standard Types

Text Entry & Form Field

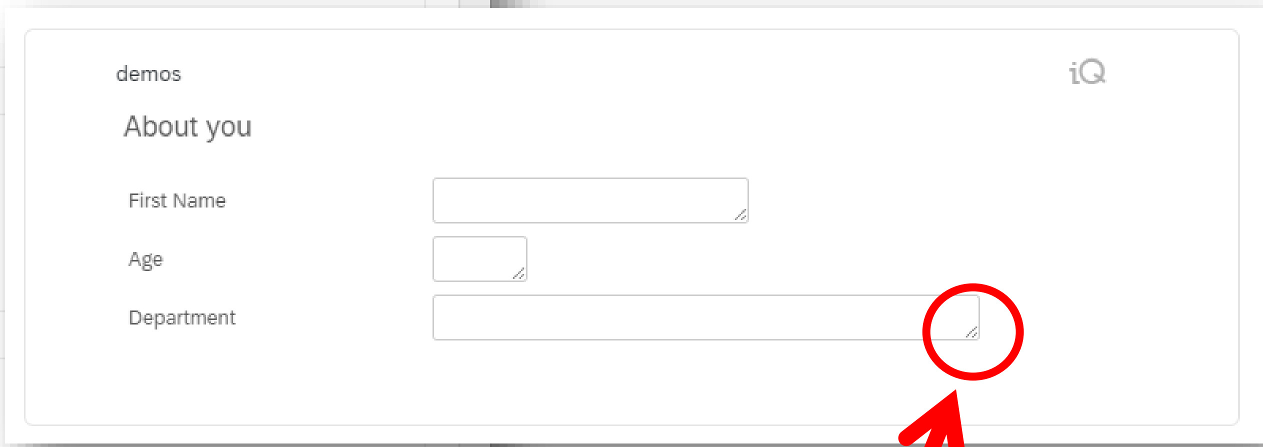
Text entry is for any self-supplied values, including numbers, words, or paragraphs.

Form field allows you to fit several text-entry questions into a smaller space.

Three Text entry Questions



One Form field with 3 Fields

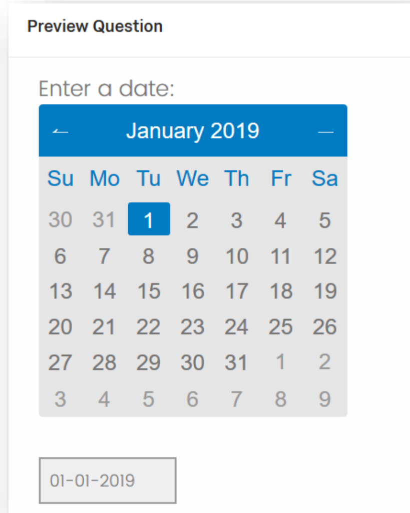


Click and drag on the bottom right corner of the field to **adjust the length** of each field to match the expected answers. This helps participants understand what you expect.

https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/standard-content/text-entry/

Date Picker

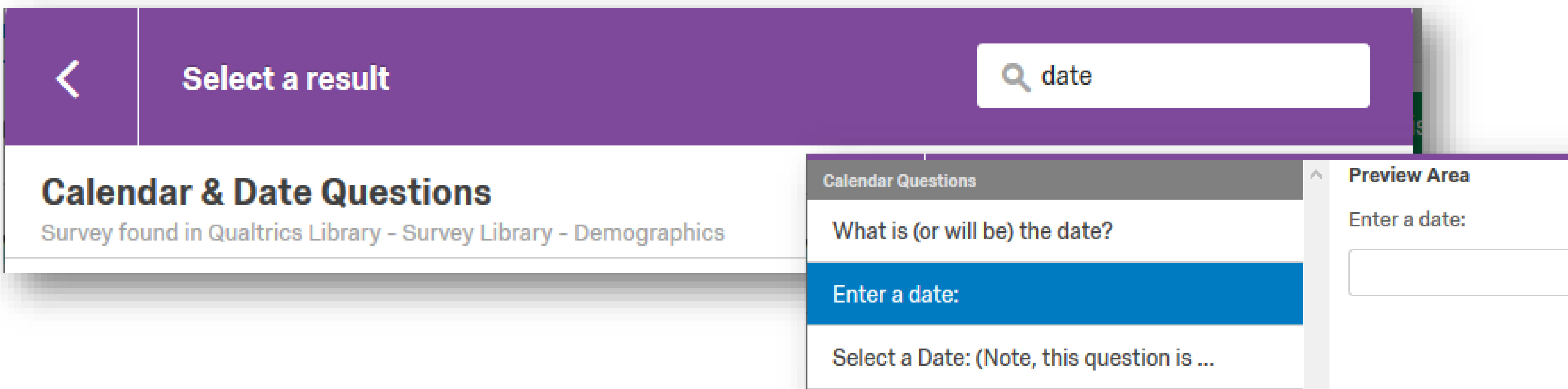
It is useful to assist participants when requesting a date.



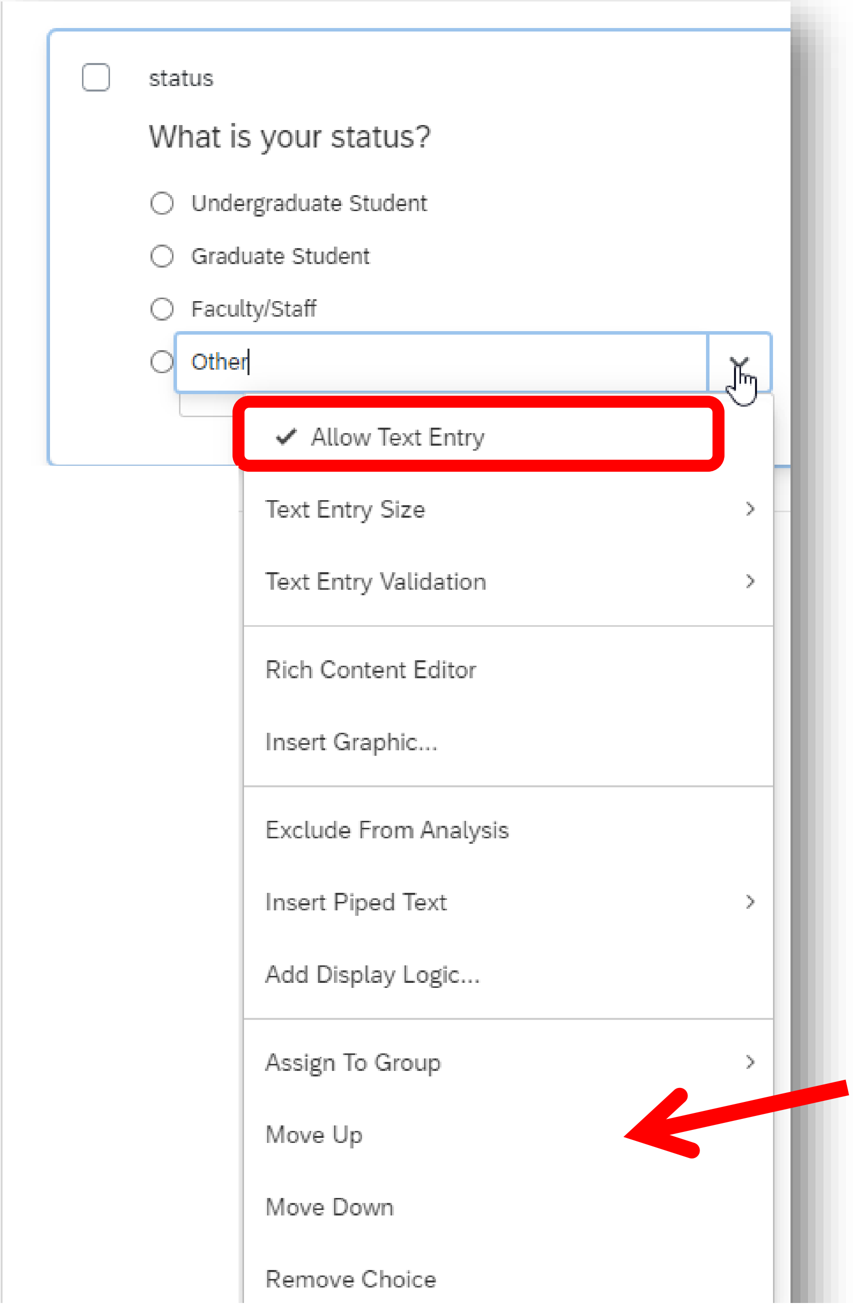
The easiest way to include a date picker is to use (or at least start with) the one that Qualtrics has.

Instead of creating a new question, you must "Import" it:

In the "Library", use the search box and type "date", then click on "Calendar & Date Questions". One of the options looks like a blank text box--that will have a date picker.



Multiple Choice



You can add **Text Entry** to a multiple choice question (e.g., Please Specify)

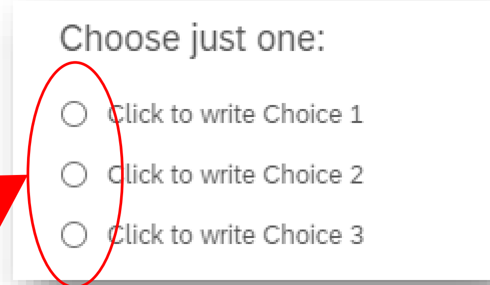
Be sure to **adjust the width** of the text box to match the expected content and add **validation** as desired.

You can also use the menu to re-order or remove answer choices or group them.

https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/standard-content/multiple-choice/

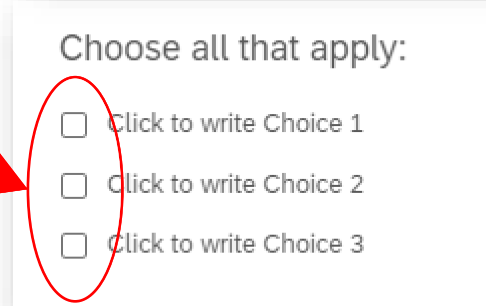
Multiple Response

The Multiple Choice type encompasses both single and multiple response/answer questions.

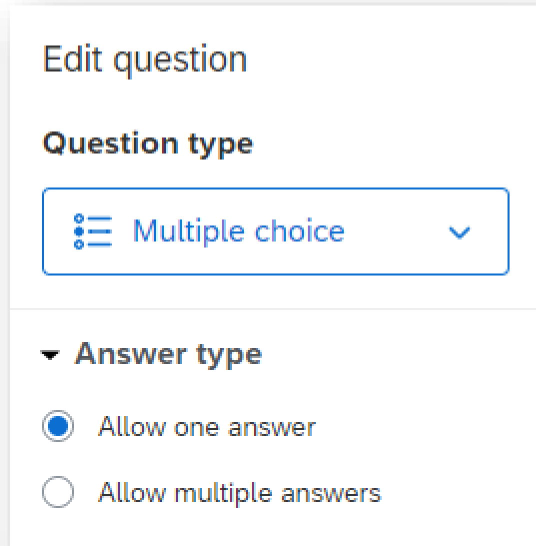


Round radio buttons are for single answer questions.

Square checkboxes are for multiple answer questions.



Multiple Answer questions result in 1 variable *per answer choice* with a 1 representing that the box was checked and a 0 or missing meaning it was not checked.

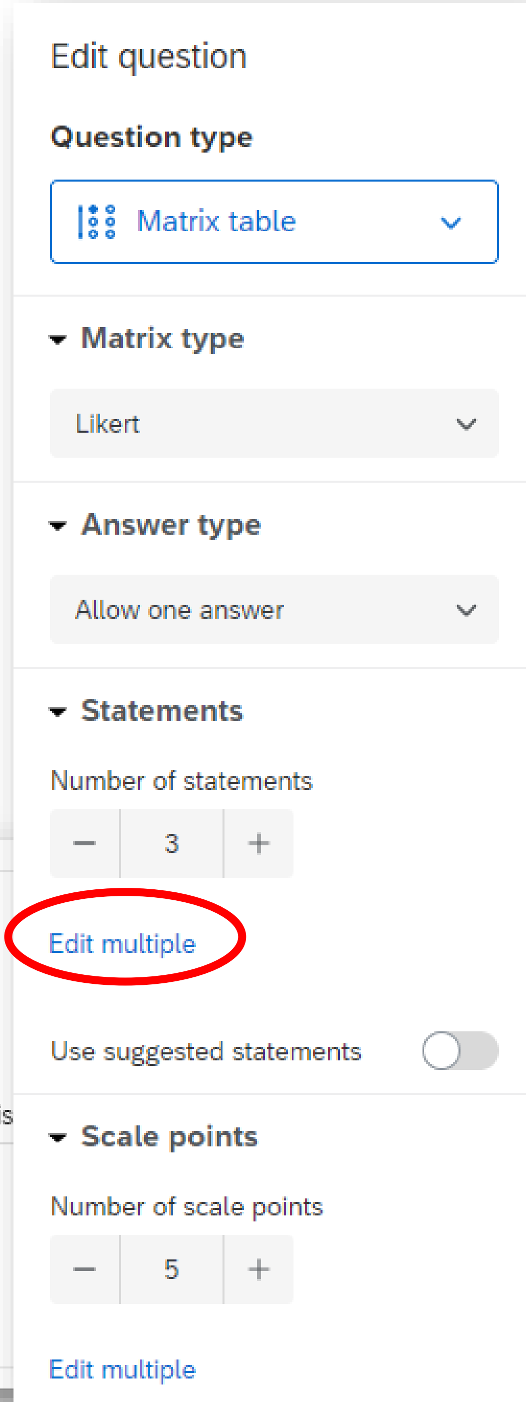


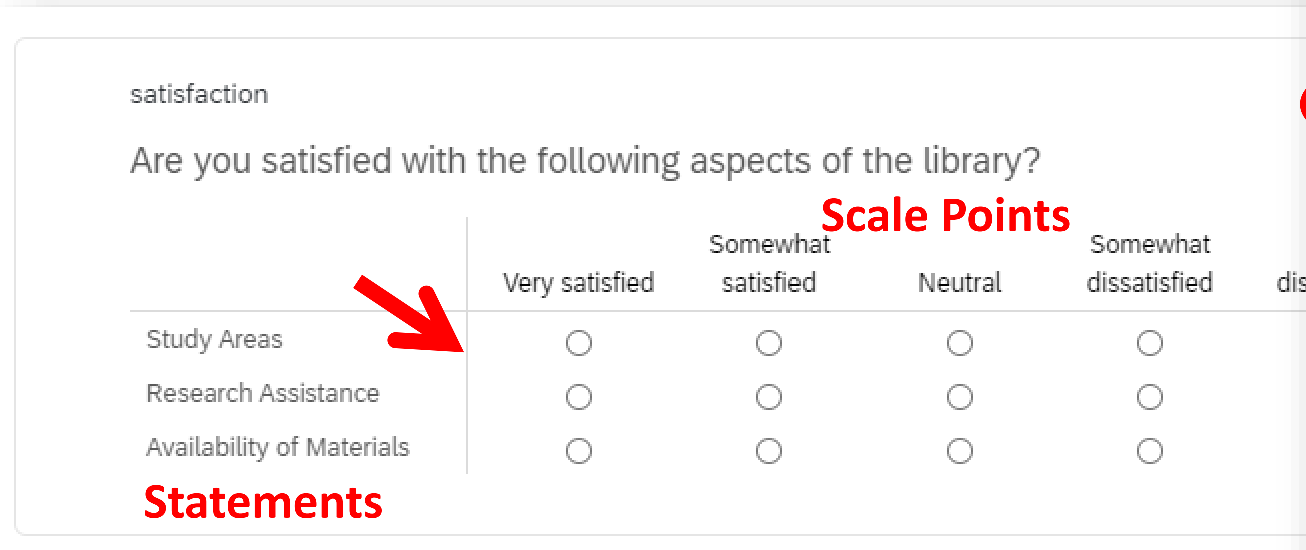
It is always a good idea to remind people when it is a multiple answer question (e.g., "*Choose all that apply*")

Matrix

Use the **Edit Multiple** text link in the editing pane to paste statements or values from a document.
It will often ignore extra characters, so you may not have to "clean" it up or remove extra lines.

Move the **divider line** between statements and answers to reduce line breaking and minimize vertical space.





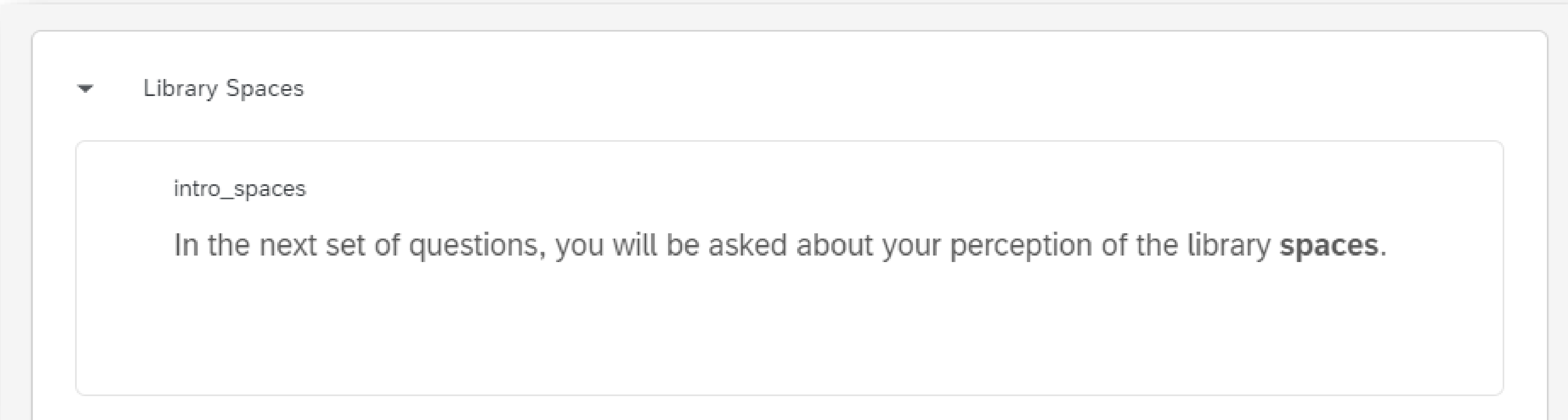
https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/standard-content/matrix-table/

Text / Graphic

Sometimes you don’t actually have a question…

It can be helpful to participants to have some explanatory text

- Introduce a set of questions to define terms, scope, or acronyms.
- Alert when the topic or response options change.



Put introductory text in a separate "question", separate from your actual questions.
Label it appropriately to more easily ignore the resulting variable.

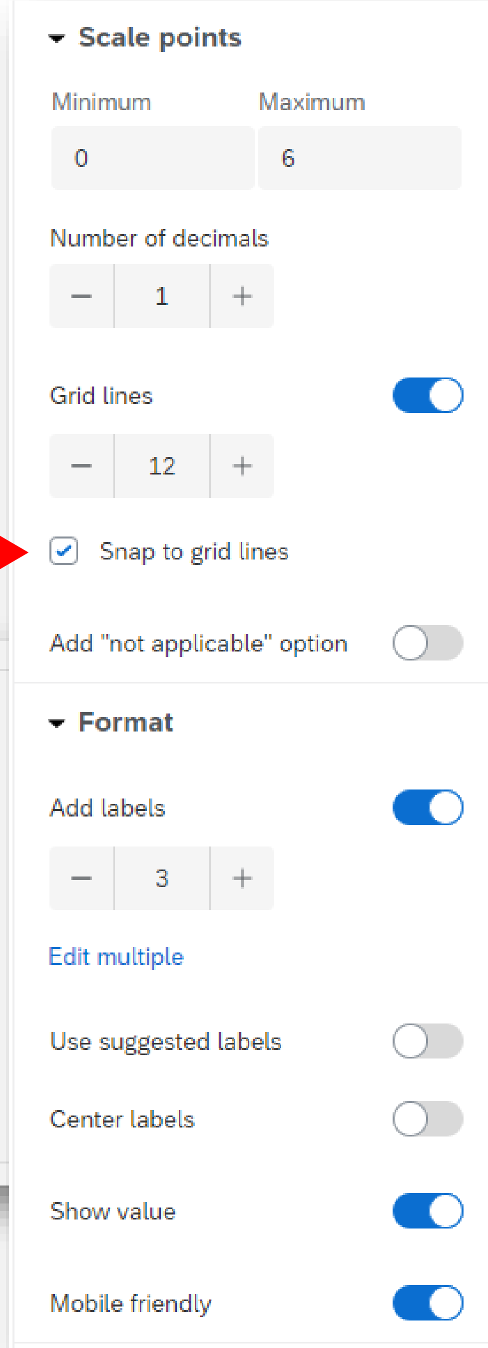
https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/static-content/descriptive-text-and-graphic/

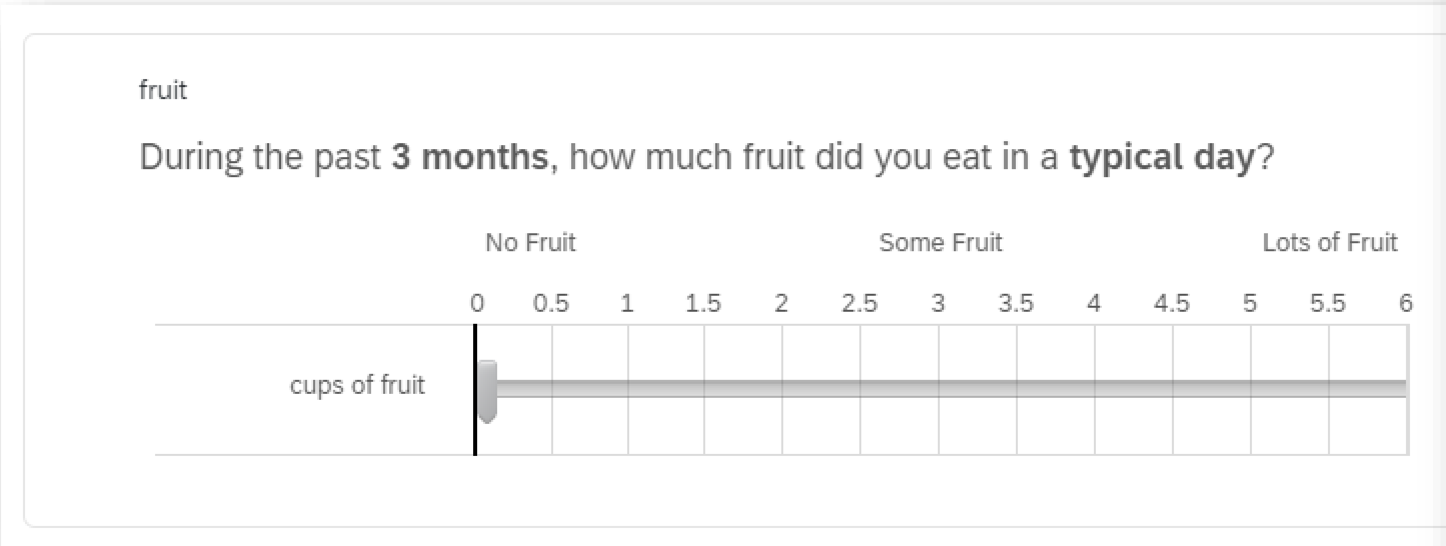
Advanced Types

Slider or Graphic Slider

A slider can be useful if you require a numeric response within a narrow range, from 6 to about 20 possible values. If you have 6 or fewer possible values, a multiple-choice question is best.

Snap to Grid makes it much (much) easier to use.





Note: This is a HARD question, but a slider may make it a *little* easier.

https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/standard-content/slider/

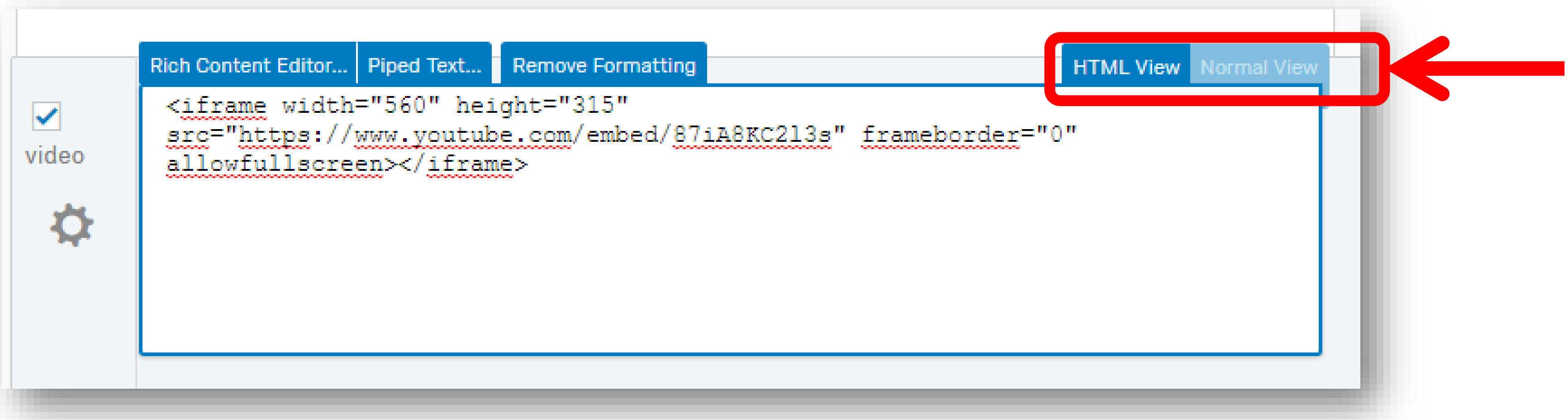
Media: Video & Embedded Content

Another reason to use a **Text / Graphic** question is to embed content.
The content to display can also be set to **Graphic** or **File.**

When editing a question, choose **HTML View** to embed code, including javascript, embed syntax (e.g., videos), or style classes.

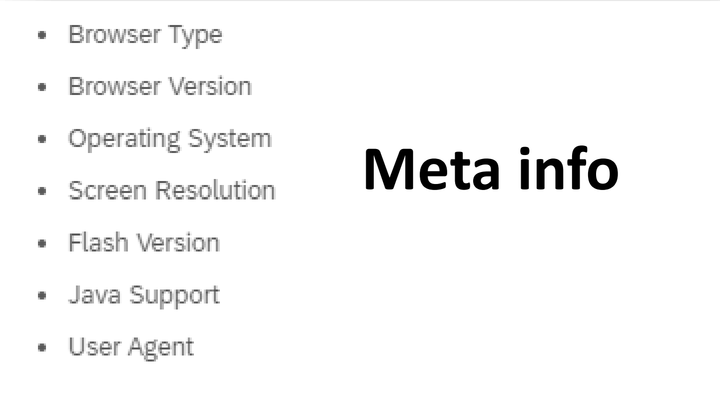
If you edit HTML directly, do not switch back to Normal view, or you might loose some of your modifications.

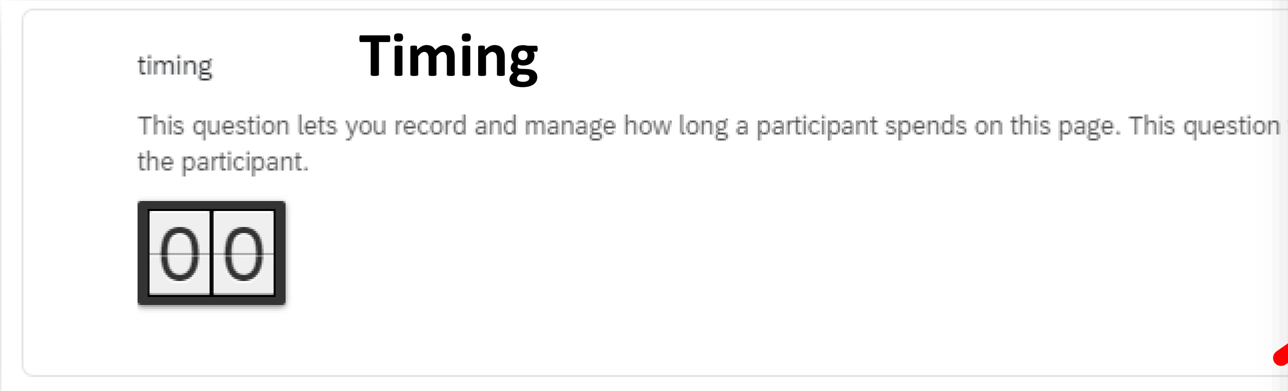
If you have a video, consider combining this with a timing question (see next slide)

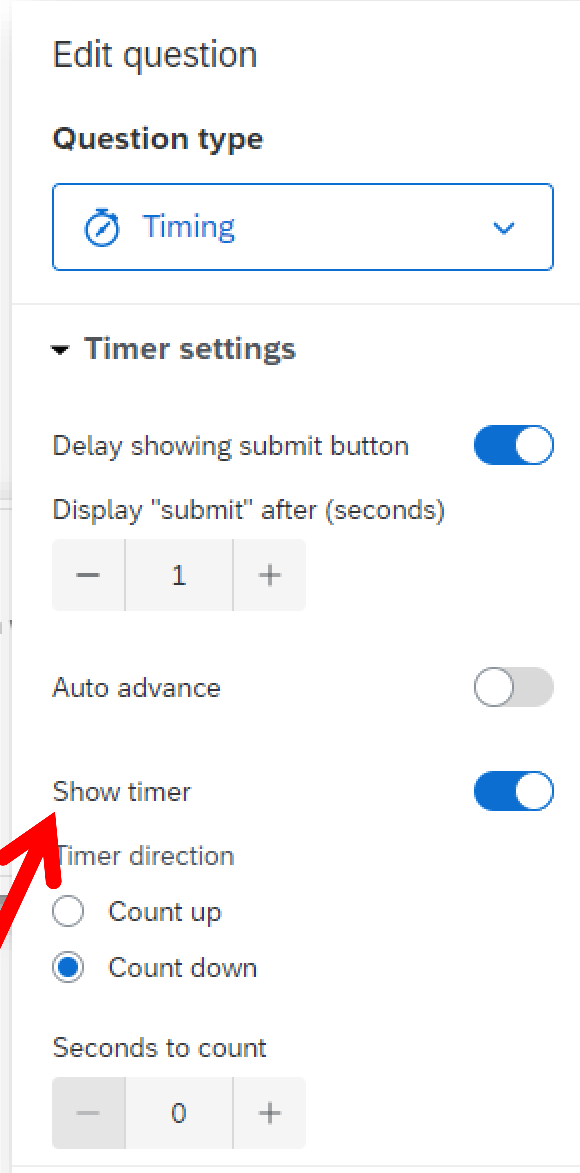


https://www.qualtrics.com/support/survey-platform/survey-module/look-feel/advanced-look-feel-settings/

Hidden Questions







Use when conducting an experiment or testing materials. Notice the other features such as automatic advancement and restricting people from submitting to fast.

https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/advanced/timing/

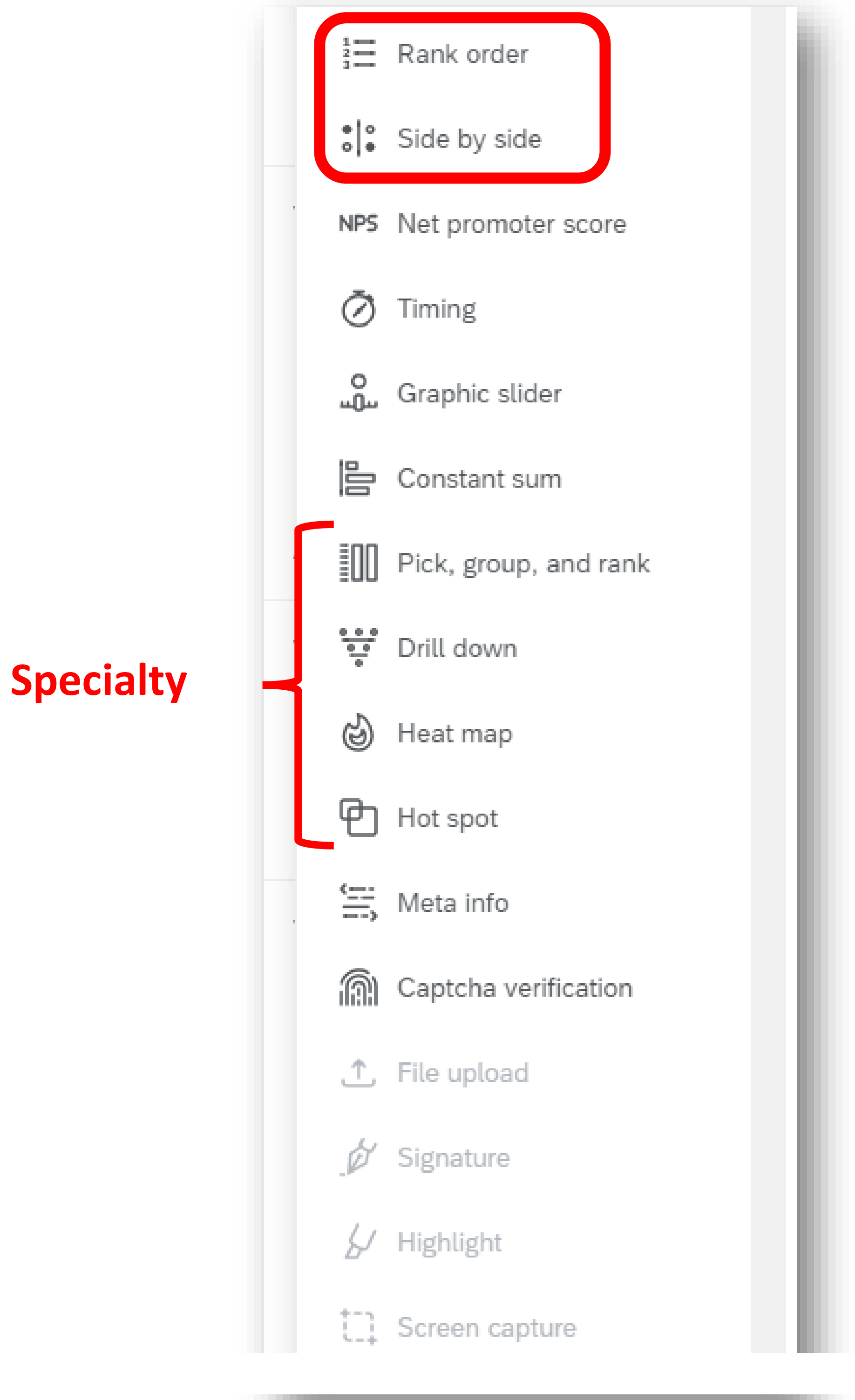
https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/advanced/meta-info-question/

Other Types

Rank Order
Ranks are difficult to analyze with traditional statistical analyses. Use a matrix question for people to rate the responses instead.

Side by Side
Can be quite difficult to answer and typically unneeded in an electronic survey. Consider Loop & Merge.

Specialty Questions
Use these ONLY if you *must* and think ahead about how you will analyze the data.



Thinking ahead to Data Analysis

Qualtrics Analysis Tools

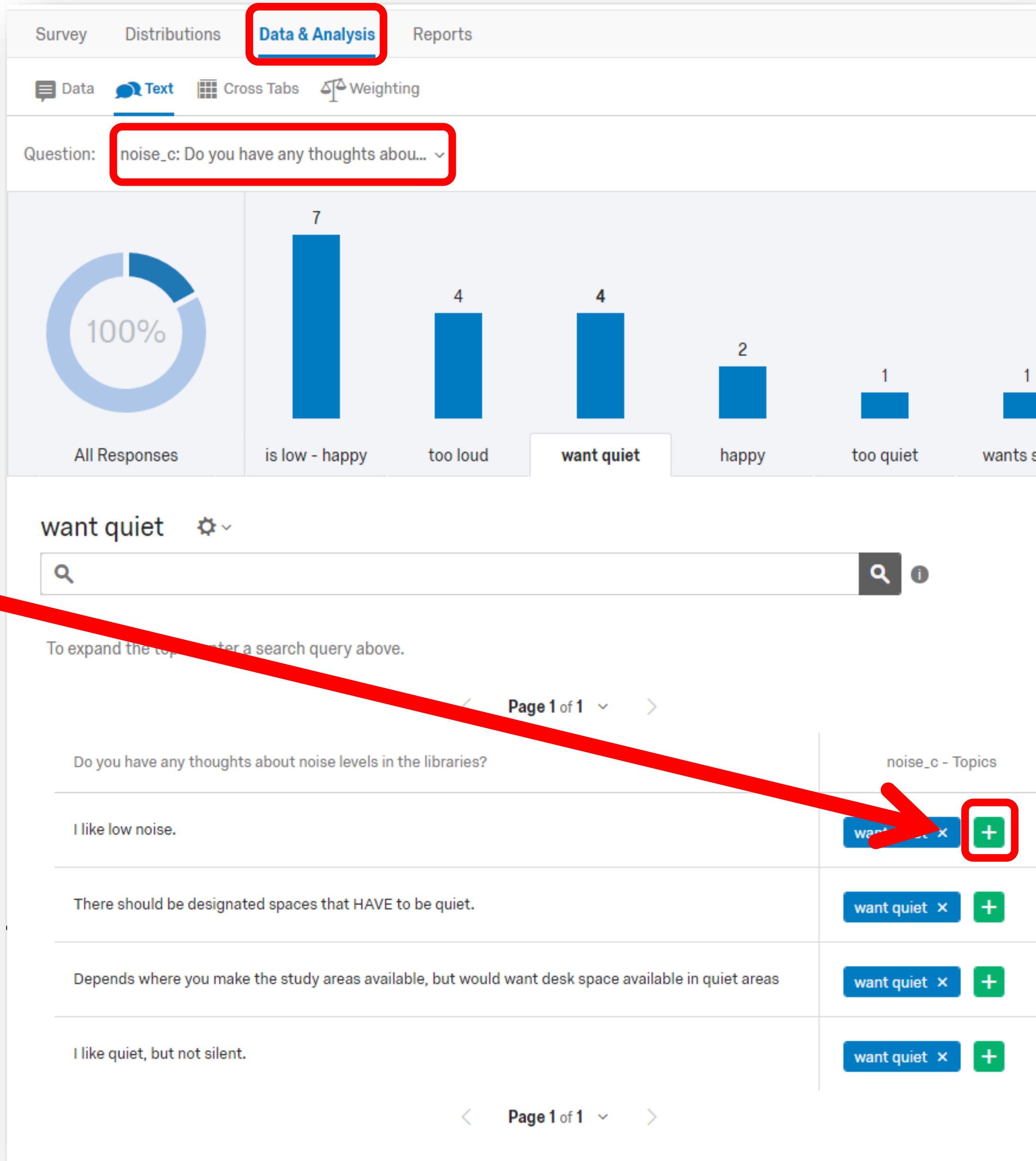
Content Analysis

“Tag” or code each text response.

1. **Choose a Question**

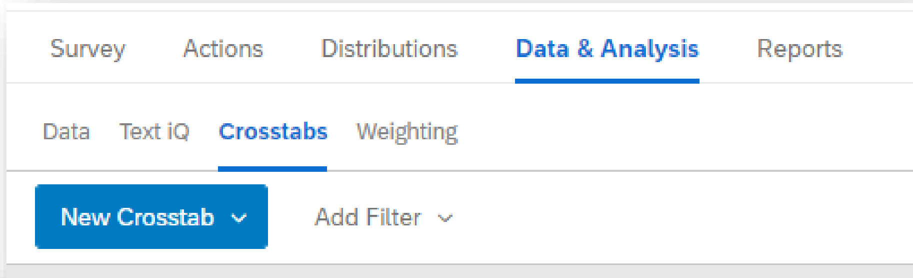
2. **Add codes**
Click the “+” to add a new code.
You can add more than one code.

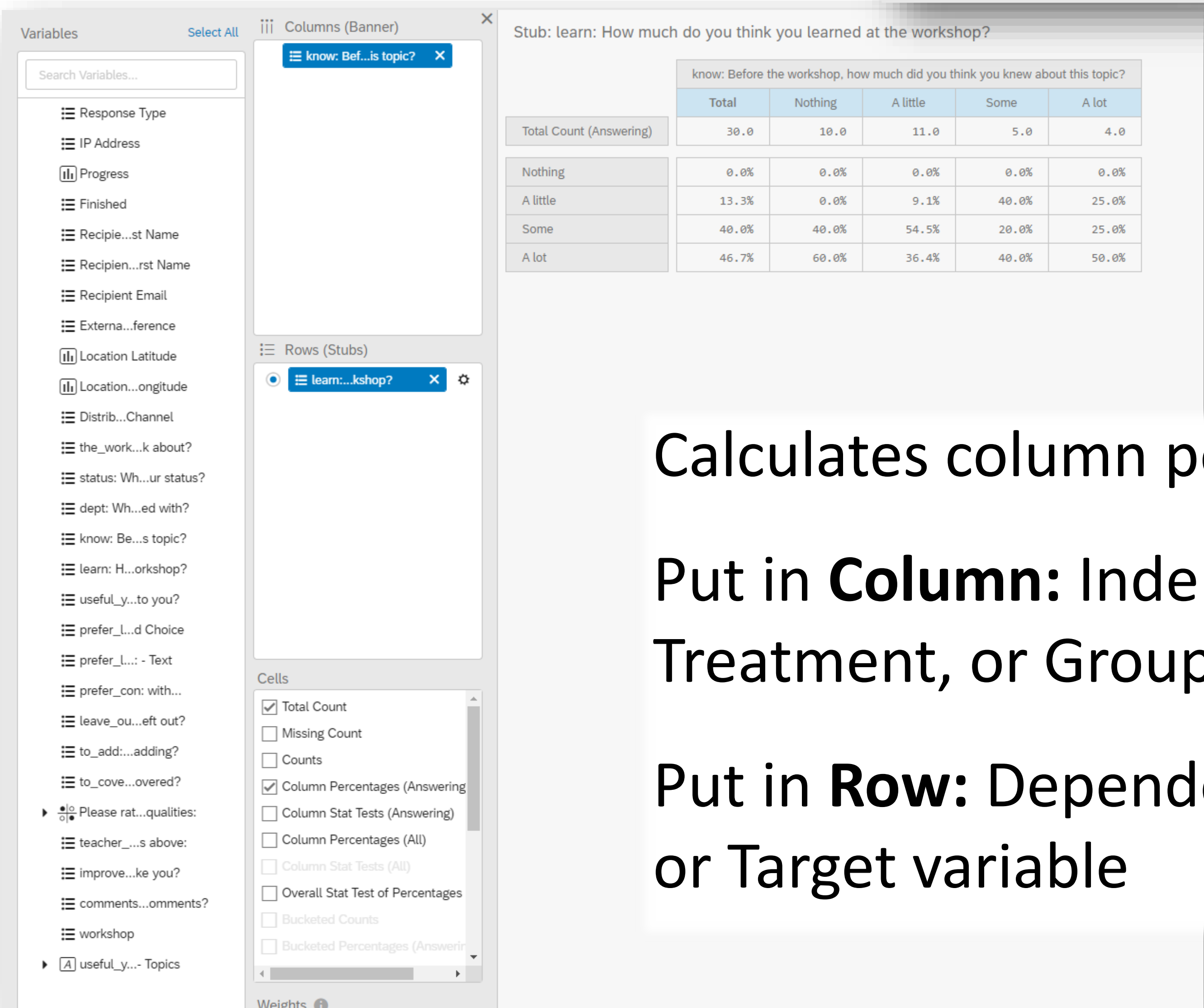
3. **View the coding**
Bar chart shows the most-used codes.
Click on a code to filter the responses..



https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text/text-overview/

Crosstabulation





Calculates column percentages.

Put in **Column:** Independent, Treatment, or Grouping variable.

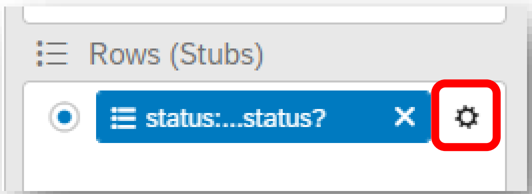
Put in **Row:** Dependent, Outcome, or Target variable

https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/cross-tabulation/cross-tabulation-overview/

Crosstabs - Bucketing

You can merge categories in Rows to better see relationships.

Click the **Gear** icon:

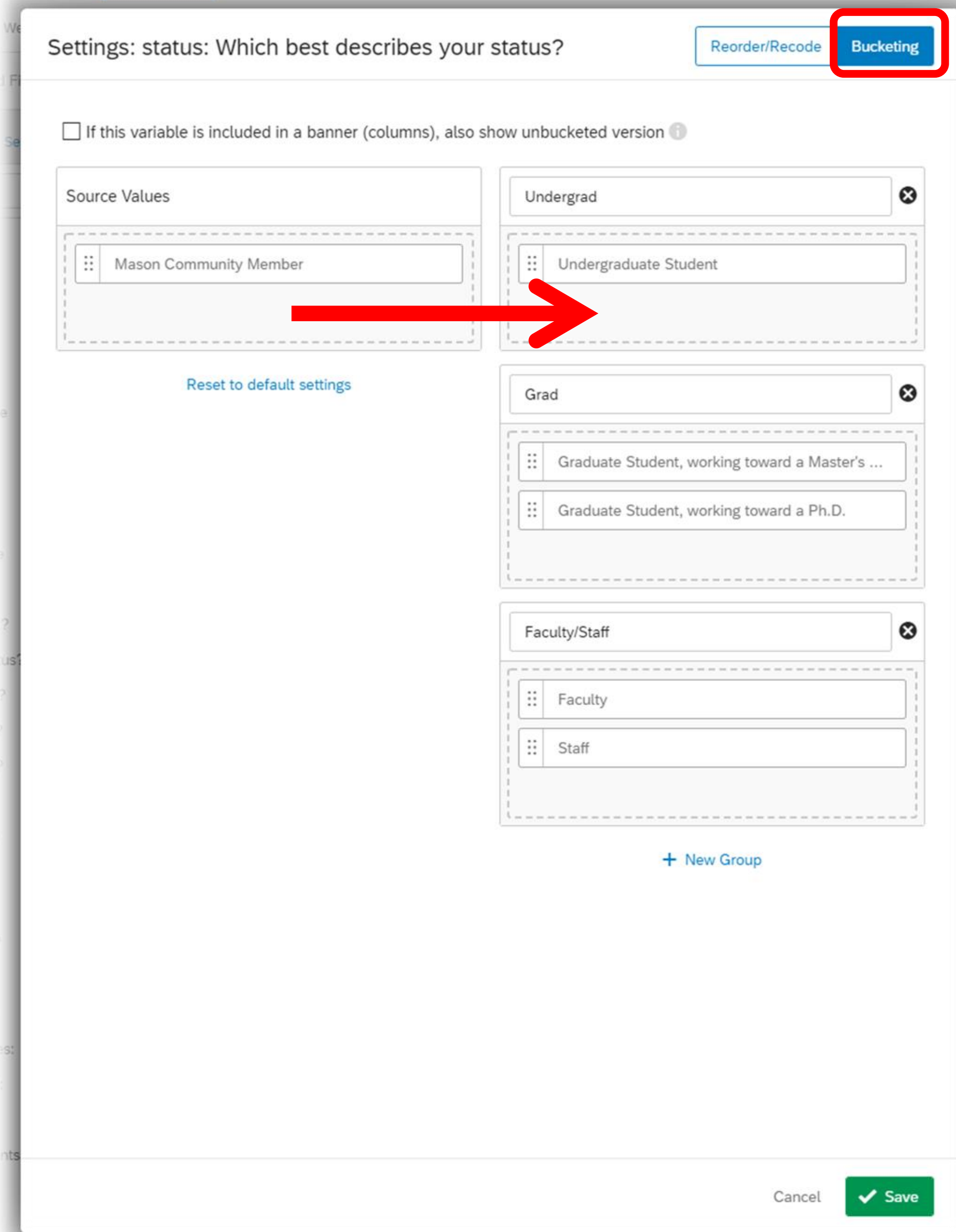


Choose **Bucketing** at the top right

Drag variables to group boxes

Label groups

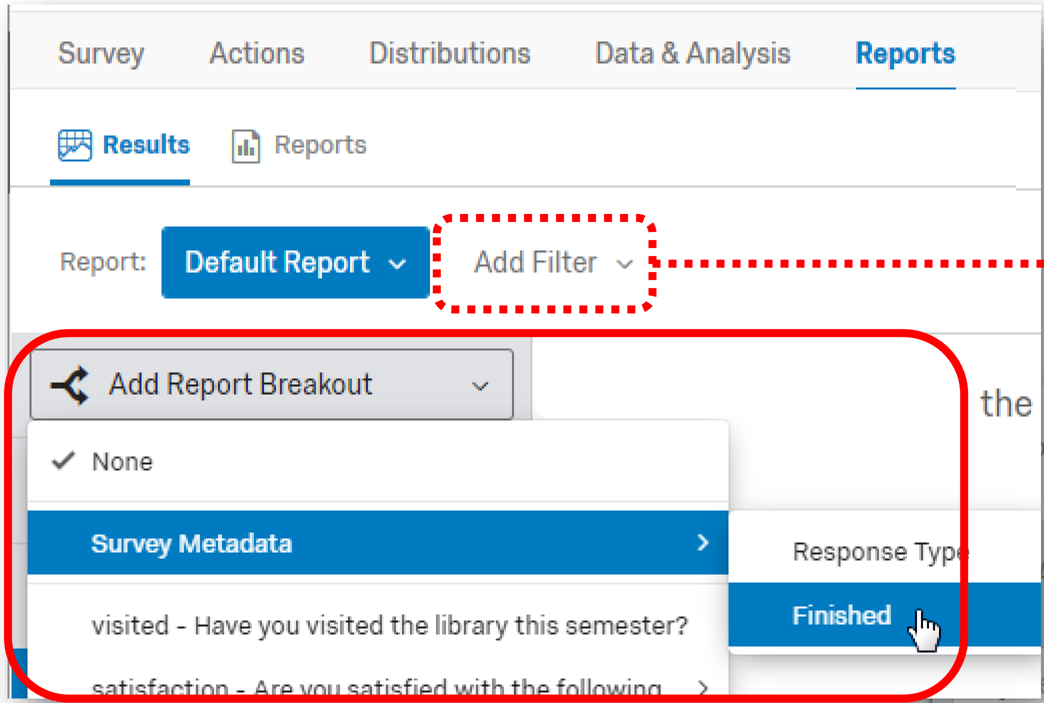
Click **Save**

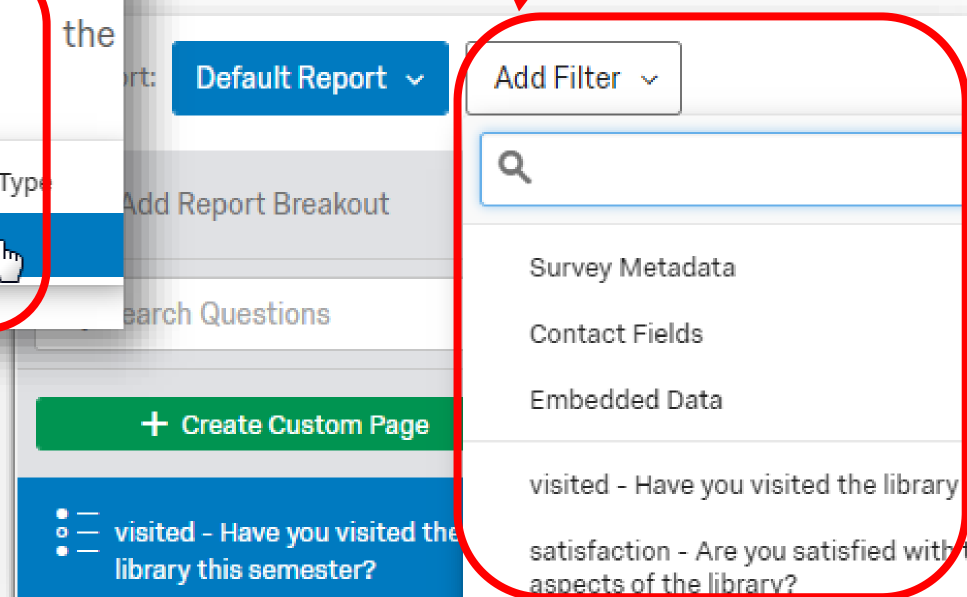


Qualtrics Tools - Reports

You can **breakout** all results by values of a variable so you can *compare* groups.

Or, you can **filter** the results to see *only* cases with specific values in the survey metadata or from responses to questions.

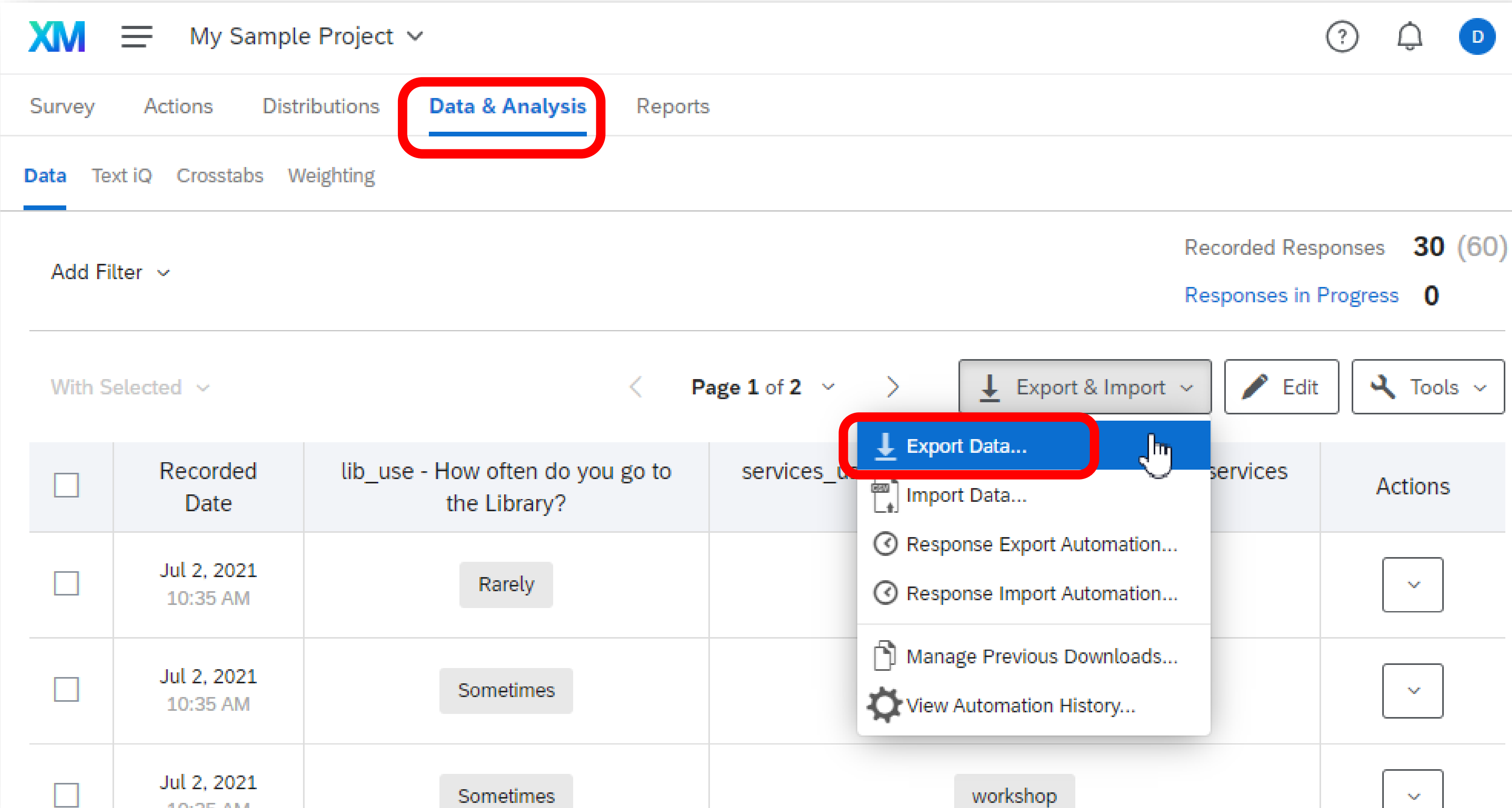




https://www.qualtrics.com/support/survey-platform/reports-module/reports-overview/

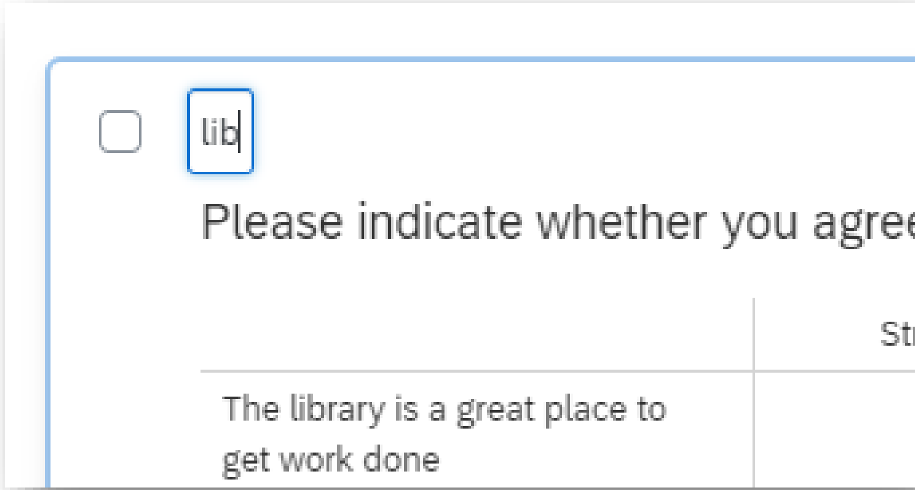
Exporting

Exporting Data



https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data/download-data/export-formats/

Question Number
aka Export Tag
aka Variable Name



The word that appears in the upper left of each question is the "Export Tag", which serves the same function as a variable name. It does restrict you to a limited number of characters, but allows spaces and special characters (like periods) that will be replaced if exported into statistical software.

By default this will be "Q1" "Q2" etc in the order that you create questions. You can re-number questions using **Auto-Number Questions** on the Tools menu. When doing so, Block Numbering is typically best, but the period is not good for statistical software.

It is best to **choose your own names** and use numbers only within scales. This makes it easier to find the questions if you need, such as when adding logic.

In **Survey Options**, you can make these visible to participants. Do not do this except when *pretesting* the questionnaire so you can more easily discuss particular questions.

https://www.qualtrics.com/support/survey-platform/survey-module/survey-tools/general-tools/auto-number-questions/

Question Labels

By default the label associated with the variable is the **entire question text**, but you can just click and change it.

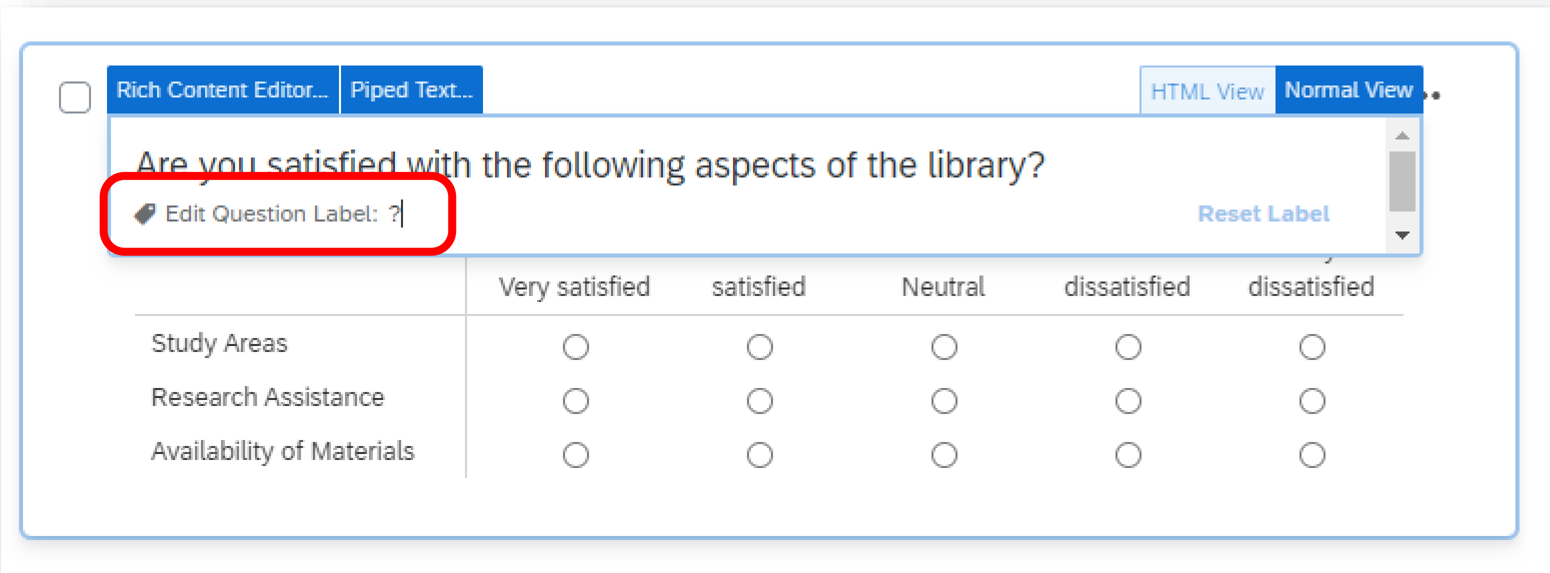
If you plan to **export the data**, you should definitely change the label for **Matrix Questions**. Making it short will make the data easier to examine.

Original:

satisfaction_1	satisfaction_2	satisfaction_3
Are you satisfied	Are you satisfied	Are you satisfied

Shortened:

satisfaction_1	satisfaction_2	satisfaction_3
?-Study Areas	?-Research Assi	?-Availability of

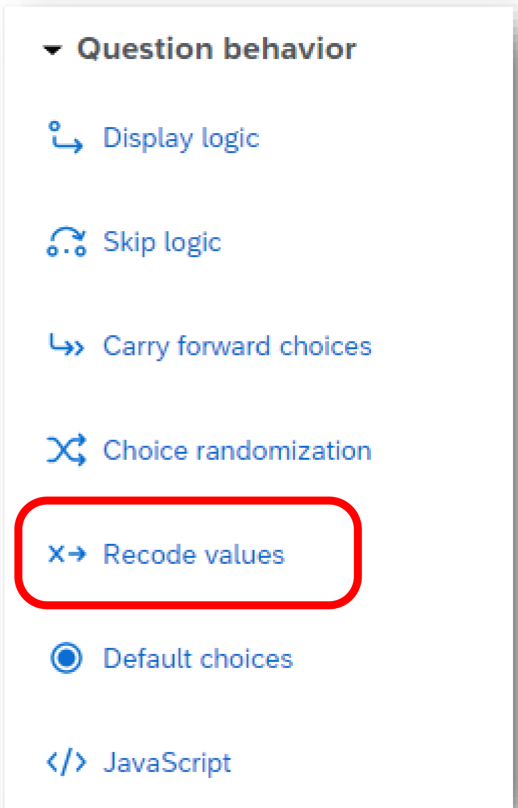


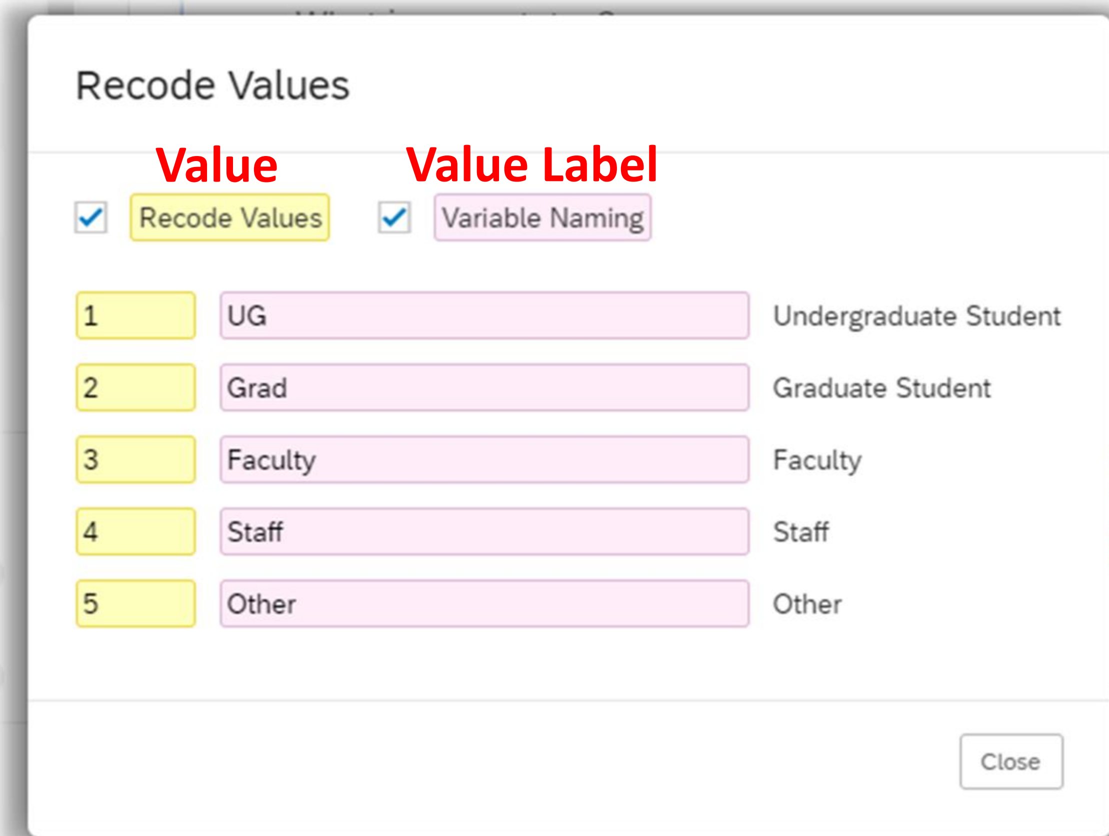
https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/formatting-questions#EditingQuestionLabels

Recode Values

If you plan to use statistical software, you may wish to change the numeric values assigned to each answer choice. Although you can use this to reverse code, consider whether it could be confusing later.

You can also change value labels, such as shortening them for better chart labels.

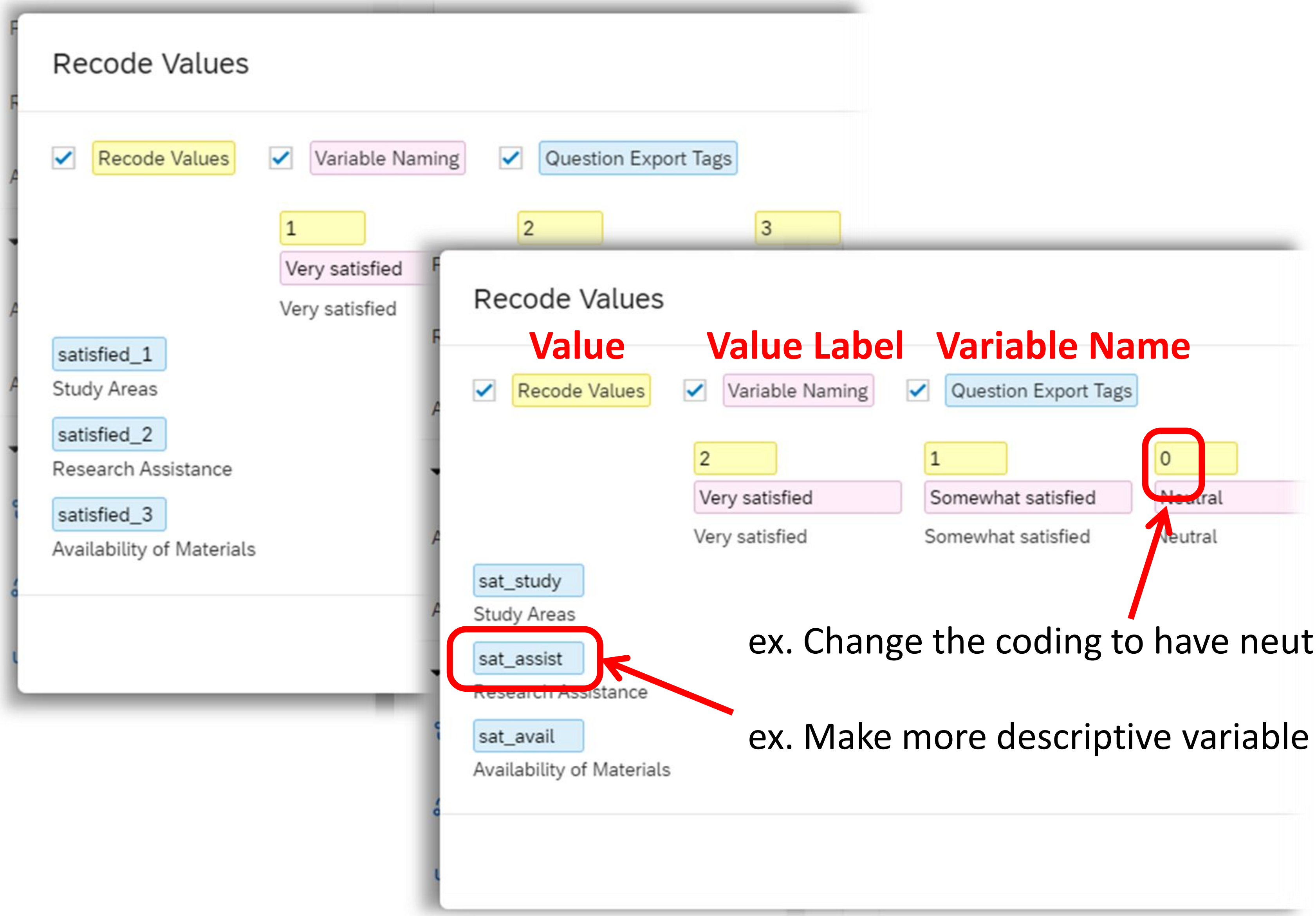




https://www.qualtrics.com/support/survey-platform/survey-module/question-options/recode-values/

Matrix Question Recode Values

For Matrix and Side-By-Side questions, you can use this to change the variable name.



ex. Change the coding to have neutral be 0

ex. Make more descriptive variable names

https://www.qualtrics.com/support/survey-platform/survey-module/question-options/recode-values#QuestionExportTags

Multiple Response Questions in Data

With Multiple Answer (aka Multiple Response, MR) questions, each checkbox becomes a separate variable.

The values become:

☑ = 1
☐ = Missing (.)

q7. Which of these subjects do you like?
(check all that apply)

a. ☐ Math → q7a
b. ☐ English → q7b
c. ☐ History → q7c
d. ☐ Science → q7d
e. ☐ None of these

*choices are **variables***

id	q7a math	q7b english	q7c history	q7d science
101	1	.	.	.
102	.	1	.	1
103	.	.	1	.
104	.	.	.	1
105	.	.	.	.
106	.	.	.	.

4 Indicator Variables

For many types of analysis in statistical software, the value for non-selected items must be 0. The following SPSS syntax will fix this issue.

RECODE *var1 var2 var3* (MISSING=0)(ELSE =COPY). (or (ELSE =1).)

COMPUTE n_valid = NVALID(*var1, var2, var3*).
IF (n_valid > 0) var1 = (var1 = 1). (*This may look weird, but it works*)

https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/standard-content/multiple-choice/#DataAnalysis

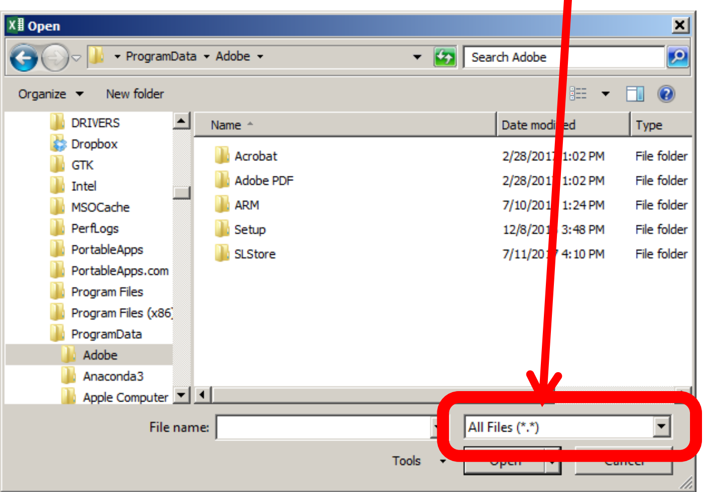
Using Excel

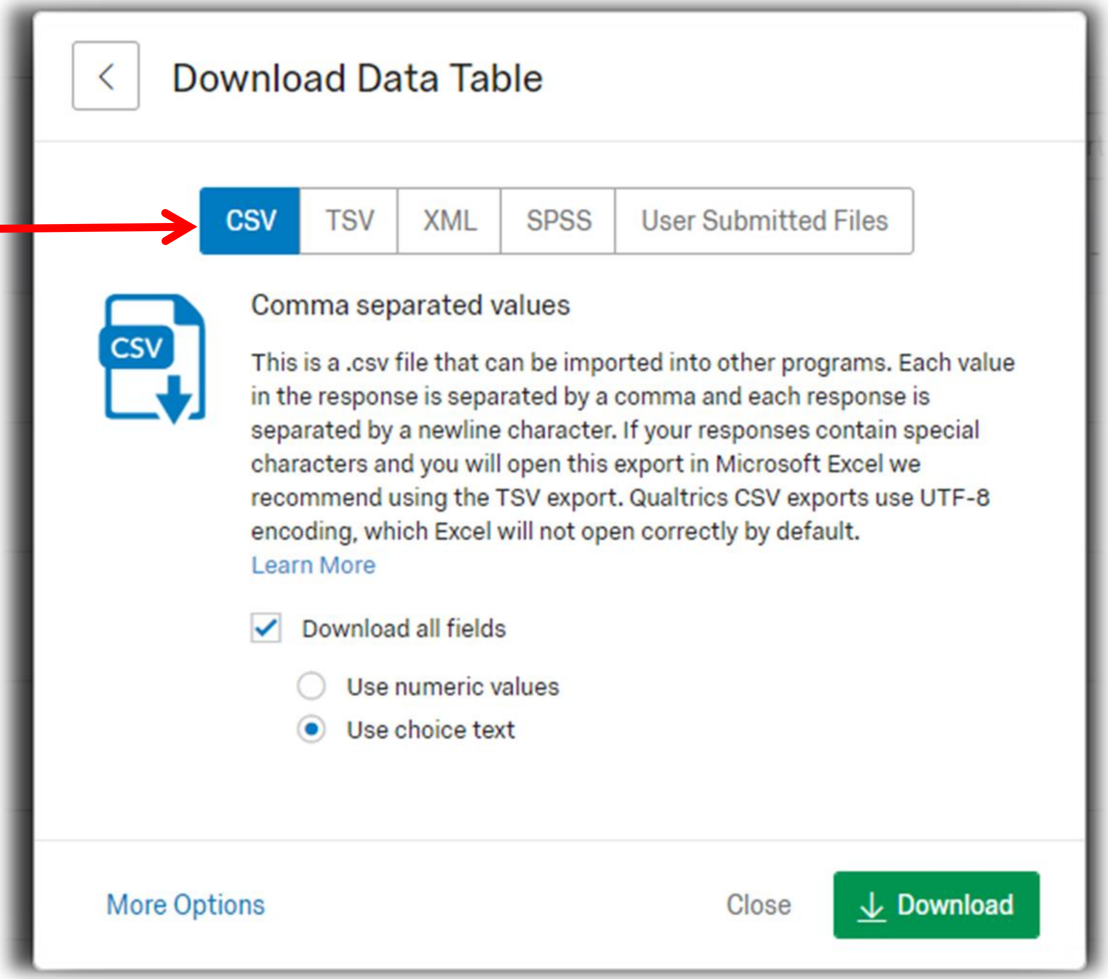
For Excel

CSV = **Comma** Separated Values
TSV = **Tab** Separated Values

Unless you have special characters (e.g., words from other languages), **CSV is fine**. That will usually allow you to double-click to open.

If you *do* have special characters, use **TSV**. You may need to choose File → Open in Excel and change the dialog box to show **All Files**.

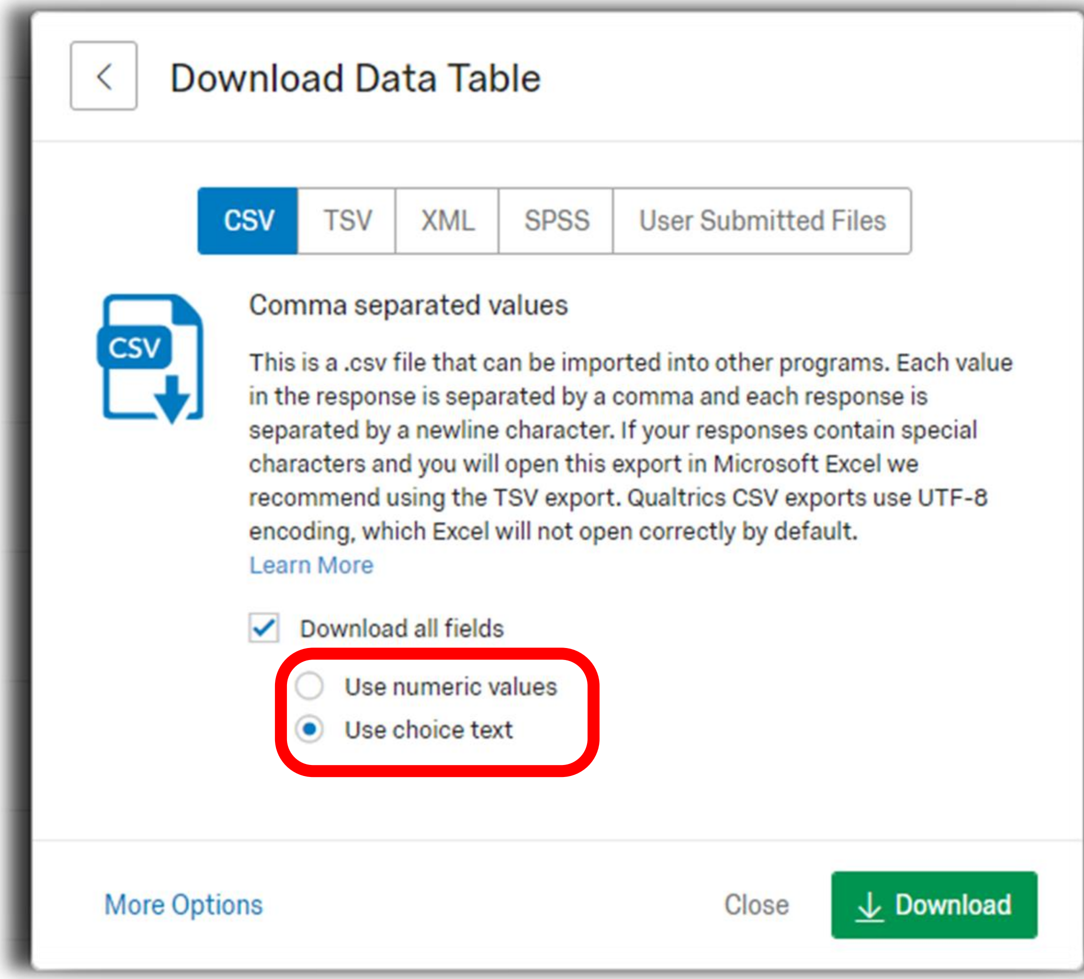




Choice Text

Use choice text in all cases unless:

- You will eventually be using statistical software
- You have many ordinal variables, and the values will not be properly ordered using choice text.



Otherwise, there is no need to use numeric values to analyze data in Excel. **Pivot tables** are strongly recommended for summarizing and displaying data.

https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data/download-data/export-options/#DataRepresentation

Using Statistical Software

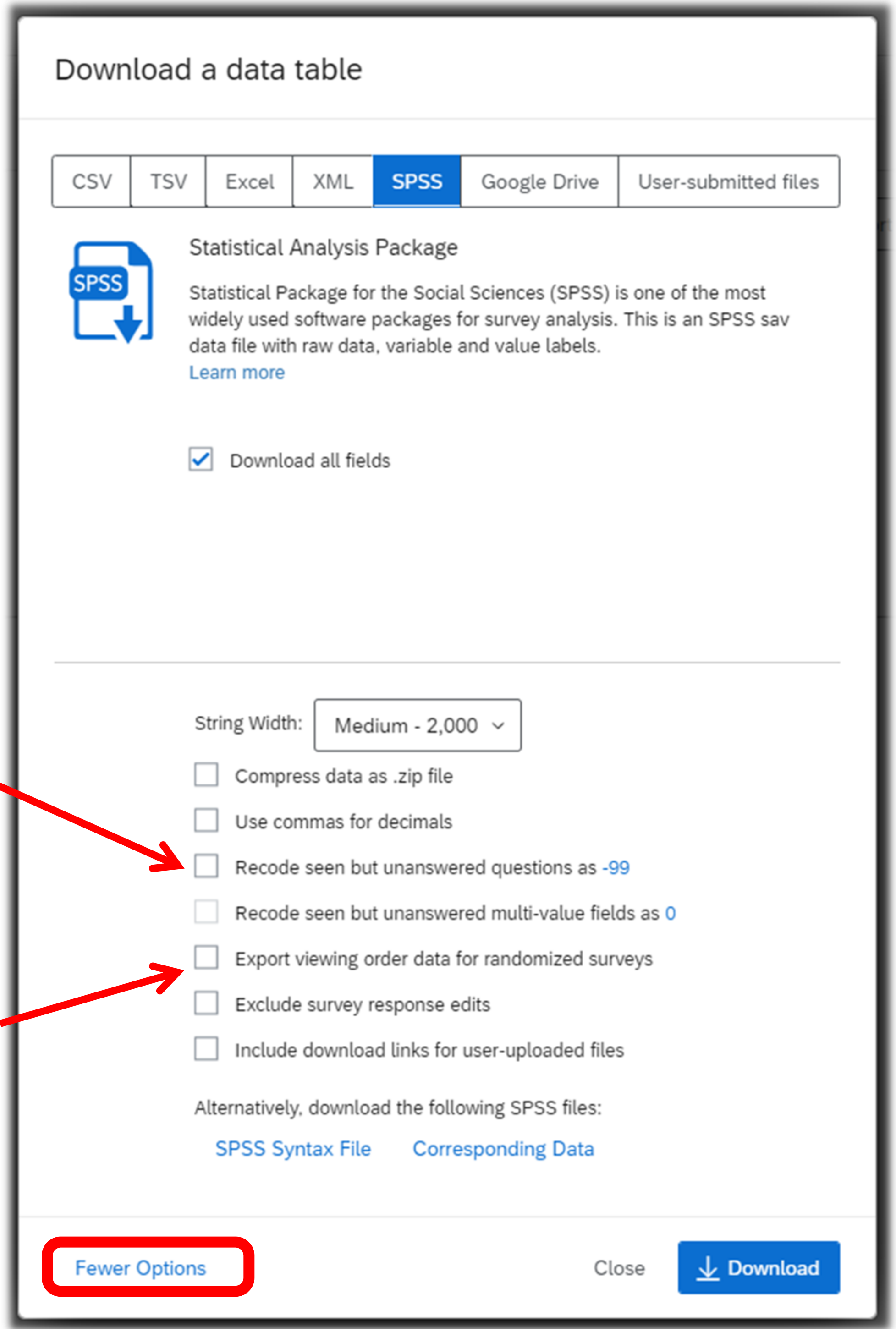
For SPSS

If you will use SPSS, download your data in a fully-labeled SPSS formatted file.

Under **More Options**, consider:

Recode seen by unanswered…:
This can be useful if people dropped out, so you can identify those who continued the survey but stopped answering.

Export viewing order data:
If you used randomization and care what was randomly shown or in what order, be sure to check this.



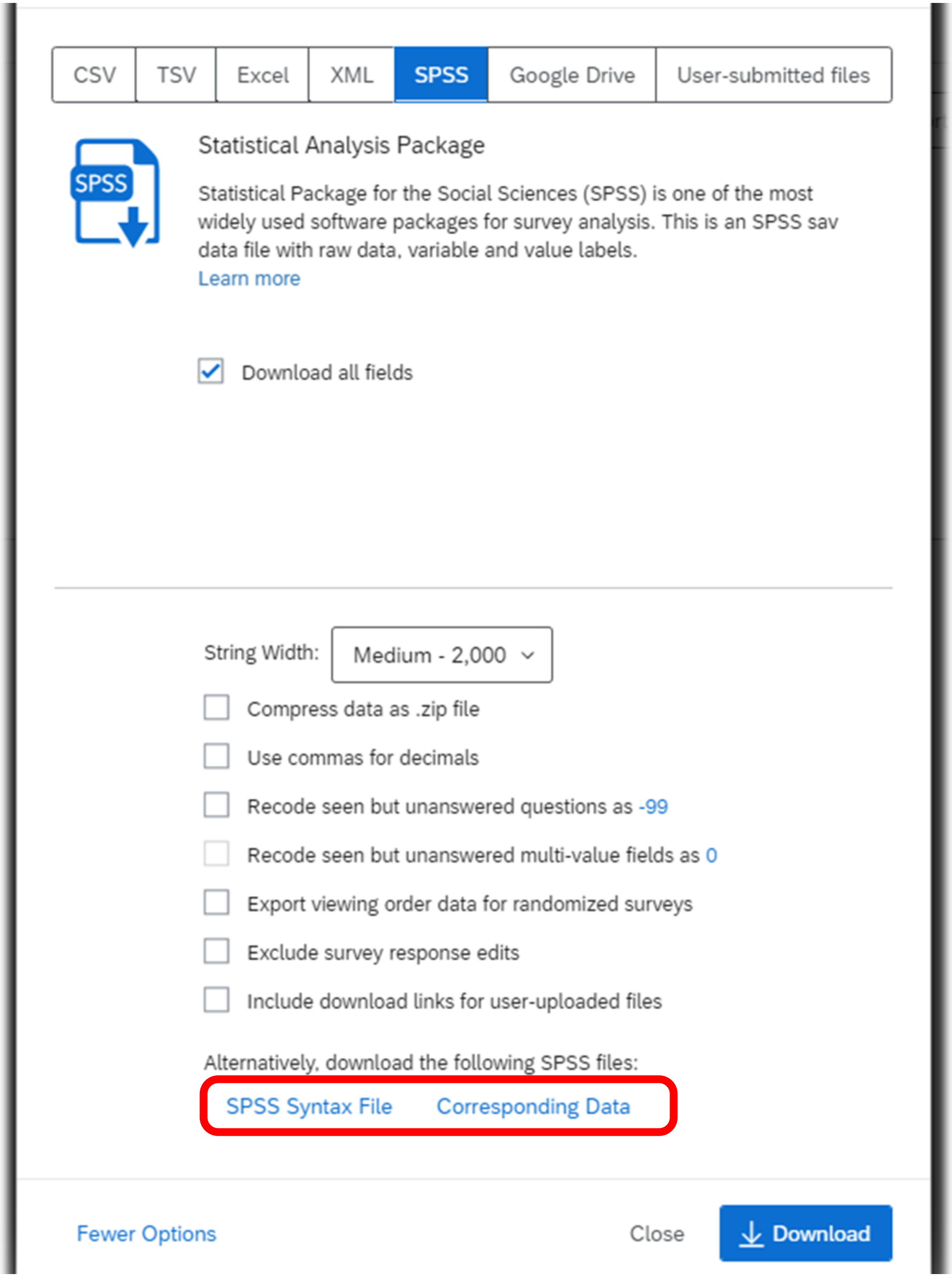
For other Statistical Software

You can **open** an SPSS file in Stata, SAS, and R, or convert it to many other formats using Stat/Transfer. So, download in SPSS format for all software.

If you cannot convert or want **more control**, you can download the syntax file.

The **syntax file** has the code to label the variables and values.

You can also get the datafile with *just* the **variable names in the first row** here.



Cleaning up Qualtrics' SPSS Files

Variable Types
Text entry questions are set as nominal, but all others are set as Scale (because they have numeric response values)

Decimals
All numeric variables by default have 2 decimal points, which is unneeded for whole number codes.

Missing Values
"Exclude from Analysis" is only for analysis through Qualtrics.
Currently, no user missing values are set.

Variable Names
"Illegal" characters are converted to underscores (_), so some names might be different. It is best not to use spaces or special characters.

See the previous slides on **Variable and Value Labels** for other tips.

Final Preparations

Final Checks

Check that the question types are correct:

- Check for **single answer** (circle) vs. **multiple answer** (square) questions
- If a multiple choice question has a few **text boxes** or one with every response:
    - Is it really a “Form” question?
    - Should you use a separate question for the explanation?
      If only some answers need explanations, use “in page” display logic

Check formatting

- Add **page breaks** to keep the participants focused.
- **Size text boxes** to match the expected responses
- Adjust **matrix questions** to reduce line breaking

Check Logic

- Check that all **logic** is the simplest type.
- Check that there are **no repeated questions** that could be in a separate block.

Validation

Validating Content

For **Text Entry** Questions only.

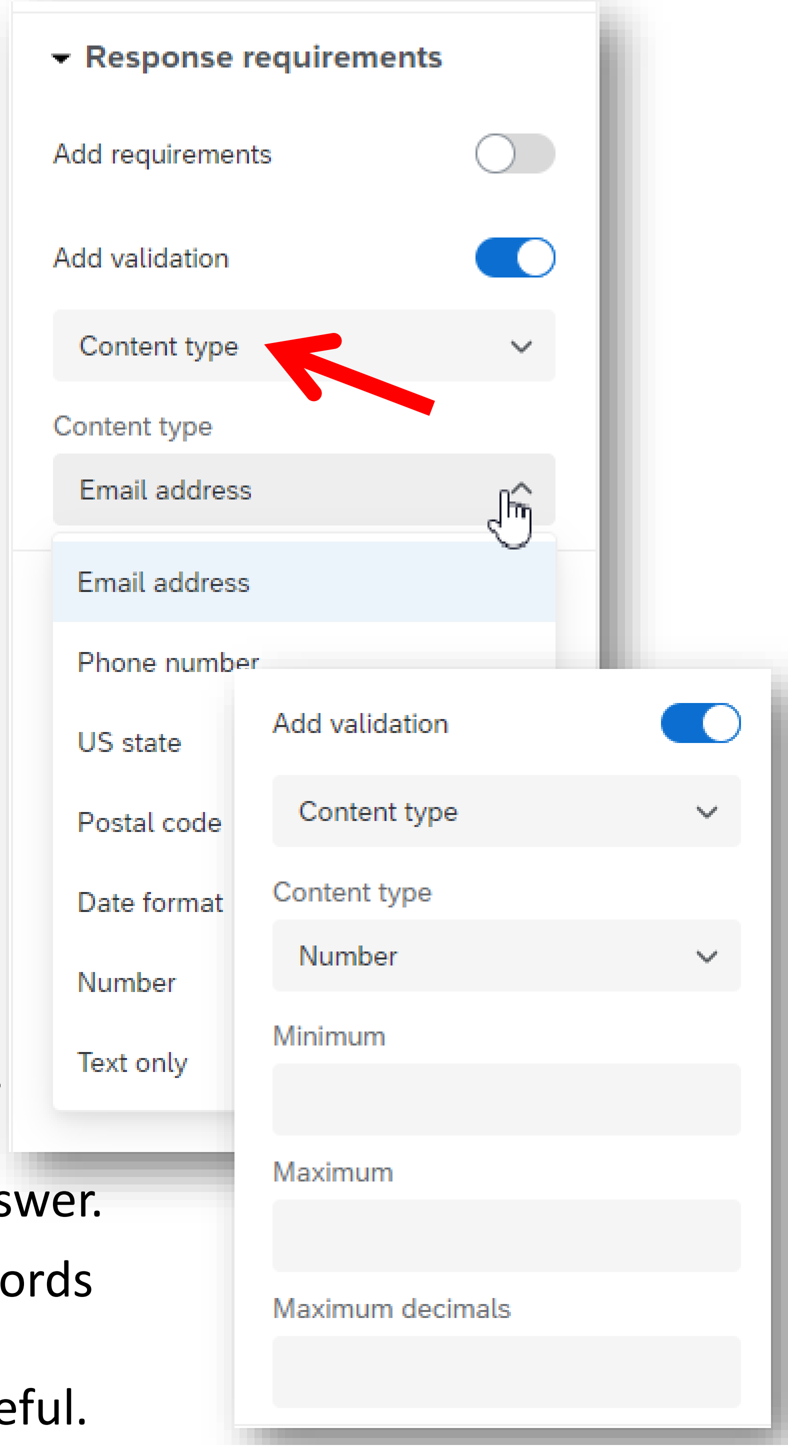
People often…

- misunderstand the question
- mistype (ex. type "4" instead of "44")
- get lazy and don't give enough information

Use **Content validation** to ensure the data you get is usable. It only applies IF a question is answered.

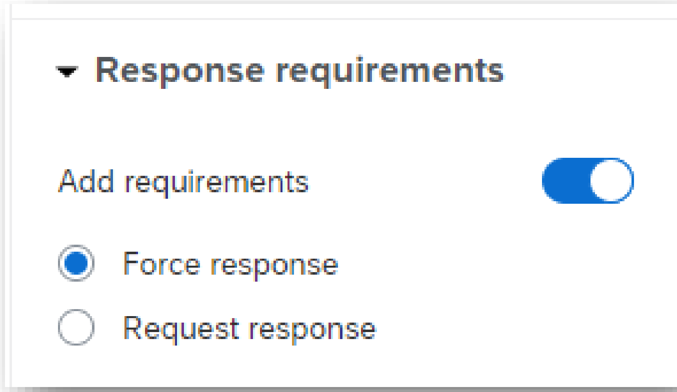
Be sure to think though what would be valid.

- Ensure number ranges encompass all possibilities without being overbroad (ex. for age, use 18-107). If someone is prevented from giving a truthful response by too-strict validation, they may not answer.
- If there is uncertainty, people may prefer to use words to explain (ex. does "years of schooling" include kindergarten?). Validation prevents this, so be careful.



https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/standard-content/text-entry/#TextEntryValidation

Requiring Response



Design your web surveys to help prevent respondents from accidently skipping a question, like displaying only one or two per page and having large areas to click on.

When to **Force** a Response

- When a response is needed for logic (ex. skipping or displaying questions)
- When the rest of their data is useless without that piece of information

✓ Be extra careful to have an acceptable response option for every person.

✓ Consider adding "Don't Know" or “No Answer", but those encourage non-answers

✓ If you force a response with no acceptable option, your respondent may drop-out.

When to **Request** a Response

- When there is a multi-part question (e.g., Matrix, Side-by-side, Forms)
- If the page will require scrolling to see all questions (not recommended)
- When an open-ended response is not required, but especially helpful

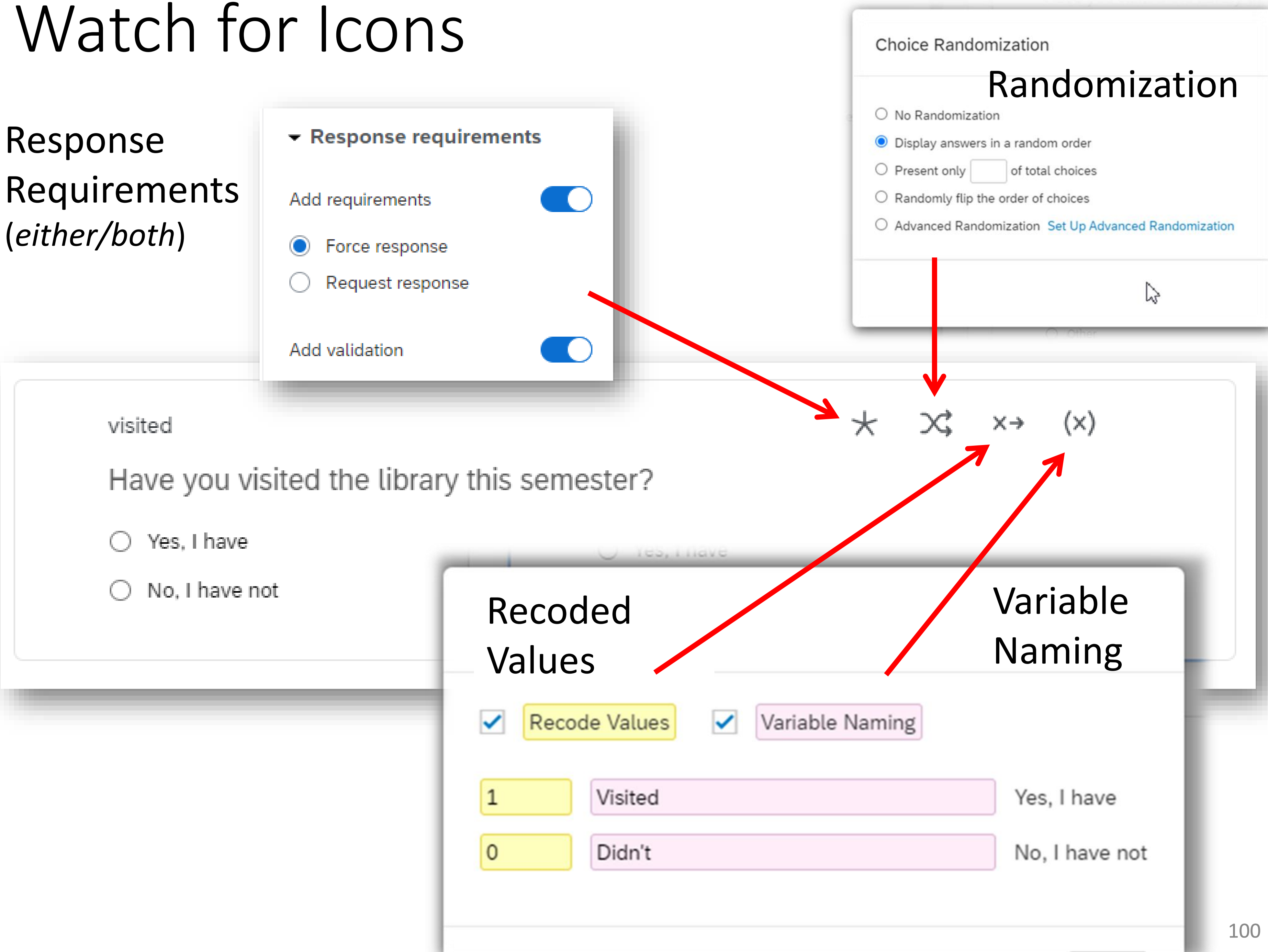
https://www.qualtrics.com/support/edit-survey/editing-questions/validation/#ForceResponse

https://www.qualtrics.com/support/edit-survey/editing-questions/validation/#RequestResponse

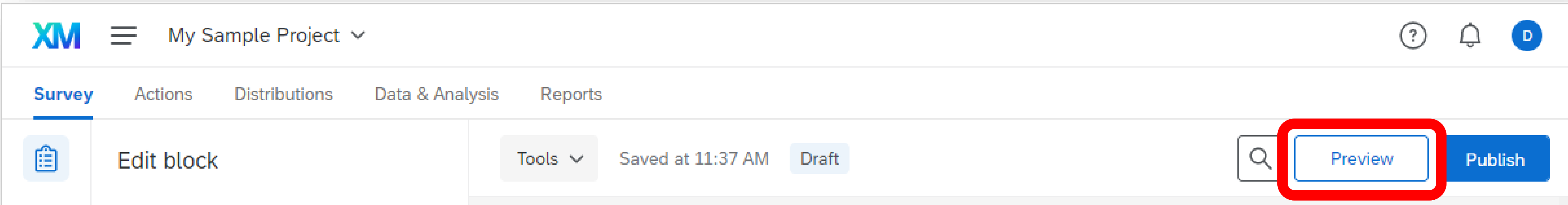
Testing

Watch for Icons

Response Requirements (*either/both*)

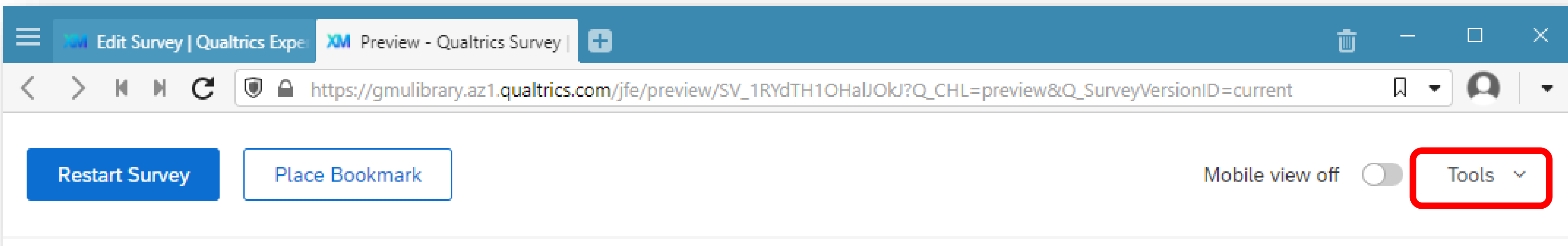


Previewing



It is crucial to **preview** the survey before releasing it and see how it will look both on a computer screen and a mobile device.

Click Tools to see options that make it easier to go through it multiple times.
You can ignore any validation you add (see another slide) or see hidden questions.

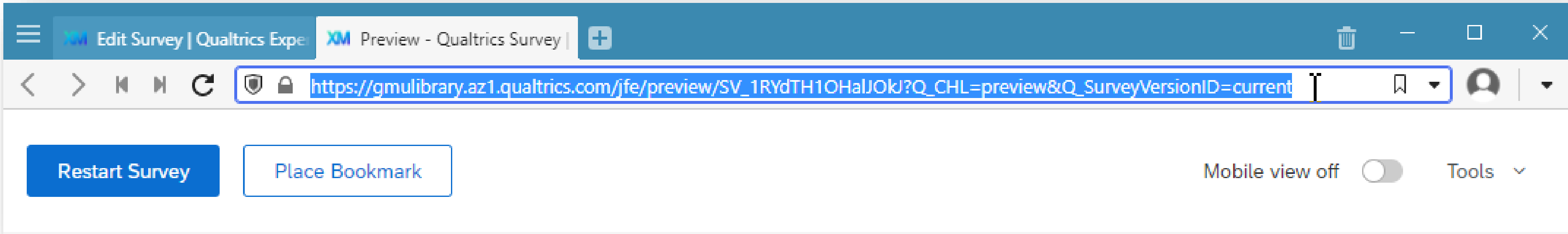


https://www.qualtrics.com/support/survey-platform/survey-module/more-survey-module/testing-and-editing-an-active-survey/

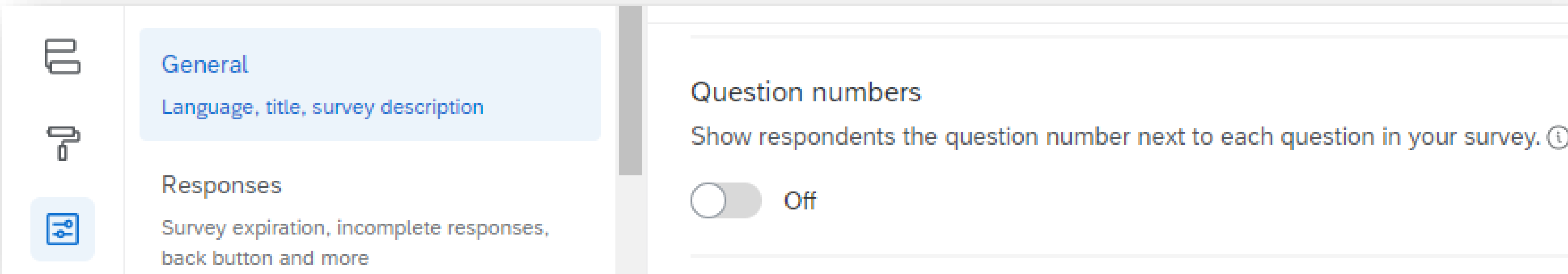
Expert Review

You should get feedback from others on your survey. You can do any of these:

- Share the survey as if they were a collaborator. Do limit permissions.
- Copy/Send the Survey Link/**URL** from the preview window:



- **Export Survey to Word** (in Tools); it shows technical info better than “Print Survey”
- Send them a “real” survey link as if they were a participant. It is useful to enable “Question Numbers” in Survey Options during this testing period so you can more easily discuss particular questions (don’t forget to turn it off again).

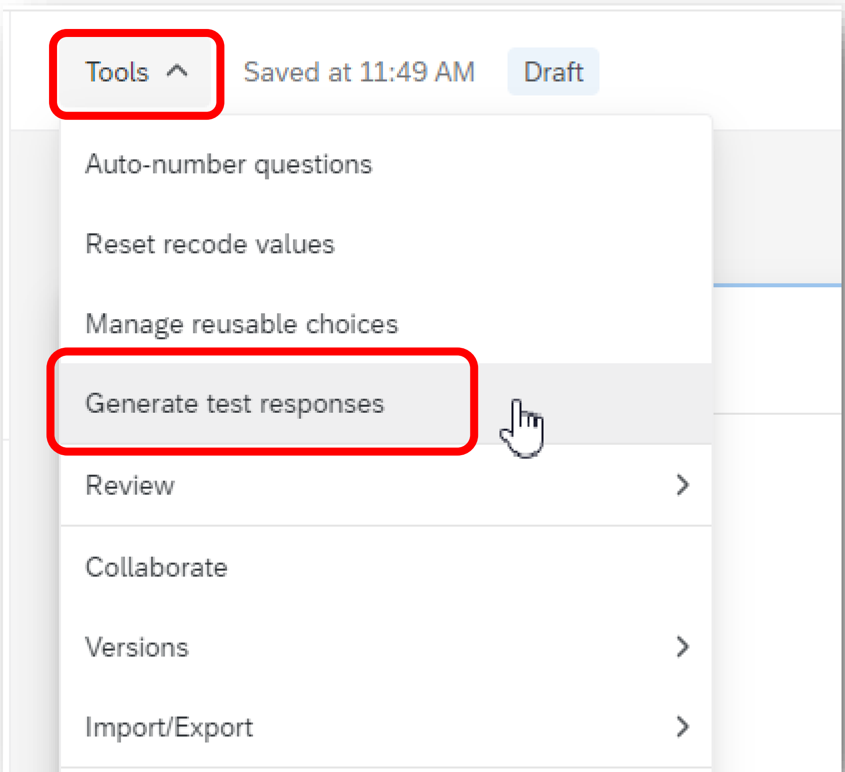


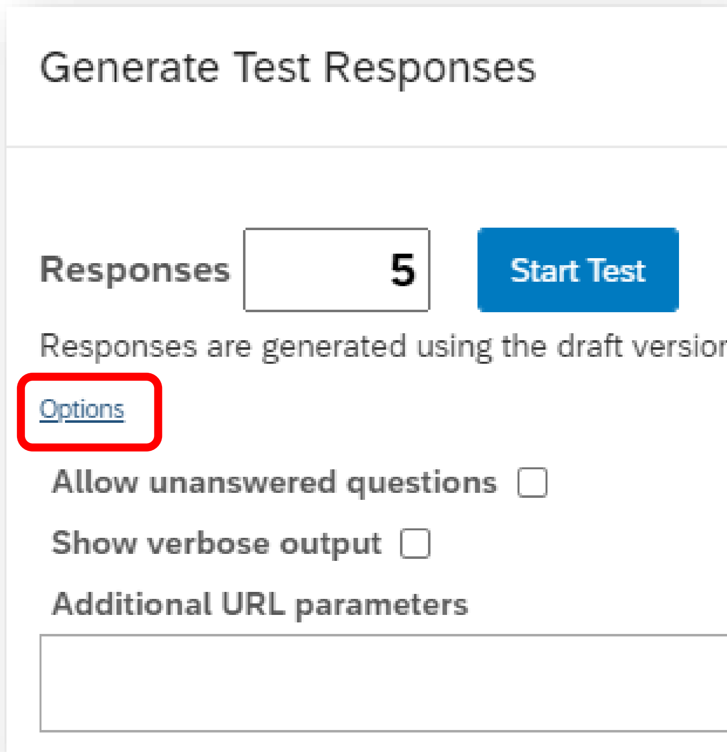
https://www.qualtrics.com/support/survey-platform/survey-module/more-survey-module/testing-and-editing-an-active-survey/

Testing Logic

“Generate test responses" can be useful if your survey has lots of Logic.

It will help you check that it is working as planned by having a computer complete the survey. It will give random responses and then act accordingly. For instance, if a particular answer means to skip over a question, the computer will skip that question.





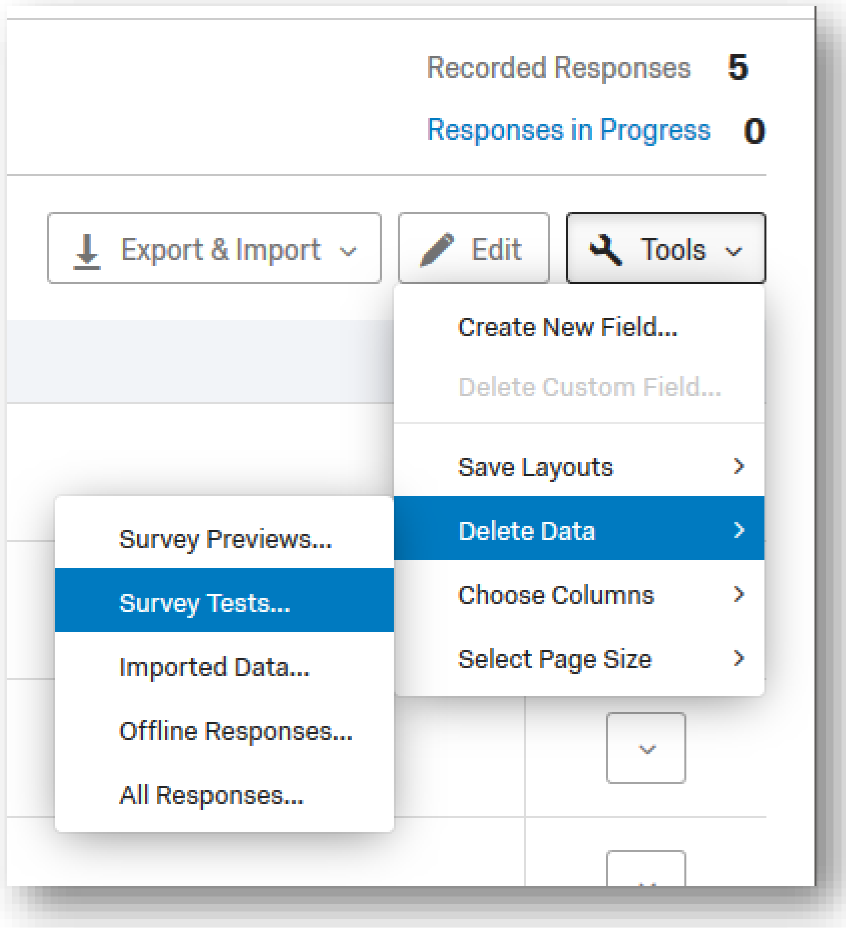
https://www.qualtrics.com/support/survey-platform/survey-module/more-survey-module/generating-test-responses/

Handling your Test Responses

When you use **Survey Preview** or **Test Survey**, the data that is generated appears just like other responses. But, it will be identifiable as tests in the “Response Type” column.

1. Be sure to **download** your Preview and Test responses if you will use another software to analyze your data. This will give you practice downloading your data and make sure you are prepared. Downloading data does not delete it.

2. You probably want to **delete** the Previews and Tests before collecting your own data. This can be done easily from the Tools menu in the data section.



https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data/completed-responses/#DeletingResponses

IRB Concerns

Security

Qualtrics has security…. do YOU?

With **anonymous** data, there is no confidentiality to maintain, so this is irrelevant.

If your data is **confidential**, and especially if it is sensitive, the IRB will want to know how you will maintain the security of your data in both:

- **Qualtrics**. You can link to their security statement and quote a relevant section, like "Qualtrics safeguards all customer data, and uses secure data centers to ensure the highest protection as per HITECH requirements.“ https://www.qualtrics.com/security-statement/
- **Your computer.** Downloaded data that is not anonymous must also be kept securely. To avoid issues, you can typically choose to download a data file without the identifier variables. Or, you should immediately strip identifying information from the datafile and use only the anonymized dataset outside a secure room.

HITECH (Health Information Technology for Economic and Clinical Health Act) updated HIPAA rules to ensure that data are properly protected and best security practices followed. Qualtrics safeguards all customer data, and uses secure data centers to ensure the highest protection as per HITECH requirements.

https://www.qualtrics.com/security-statement/

Informed Consent Agreement

- Use a **Multiple Choice** Question
- In the **Question Text**, paste your consent form
- Make the **Answer Choices** Yes/No or I agree/I do not agree
- Use **Skip Logic** to **End the Survey** if **Yes/Agree** is **Not Selected**
- **Force a Response** to the question

https://www.qualtrics.com/support/survey-platform/faqs/survey/

Distribution

Best Practices: Recruiting

See examples from Don Dillman's book the Tailored Design Method, available in the Digital Scholarship Center reference section. A summary is available at http://edis.ifas.ufl.edu/pd077

Consider if you are trying to achieve a **random** or **representative sample** or not.

- **Representative**: A sample that has the same characteristics as a larger population.
- **Random**: The only way to use math to quantify how representative your sample is.
- **Convenience** : If your sample is not representative, you can't draw conclusions about a larger population, but you can describe your data.

Think carefully about how much to tell people about your survey ahead of time.

- People with strong opinions about the topic may be the only ones who take it, and possibly only if they think you agree with them
- People with no pre-existing opinion may decide they shouldn't take the survey.

Not having those types of people in your data will make it hard to draw conclusions about a population. In other words, your data will be **biased**.

http://edis.ifas.ufl.edu/pd077

Best Practices: Response Rate

Especially if you are doing a survey with a random sample, the **response *rate*** is just as important as, if not more important than, the **total number of responses**. A low rate could mean that the people who actually completed your survey are not representative of all those selected.

Pay attention to 2 factors:

- Getting people to **start** your survey
  - Make invitations as personal as possible
  - Make yourself seem reputable and trustworthy
  - Explain why the research will ultimately benefit them
- Getting those who start to **finish**
  - Start with “easy” questions, put hard or sensitive ones later
  - Start with interesting questions (e.g., not demographics)

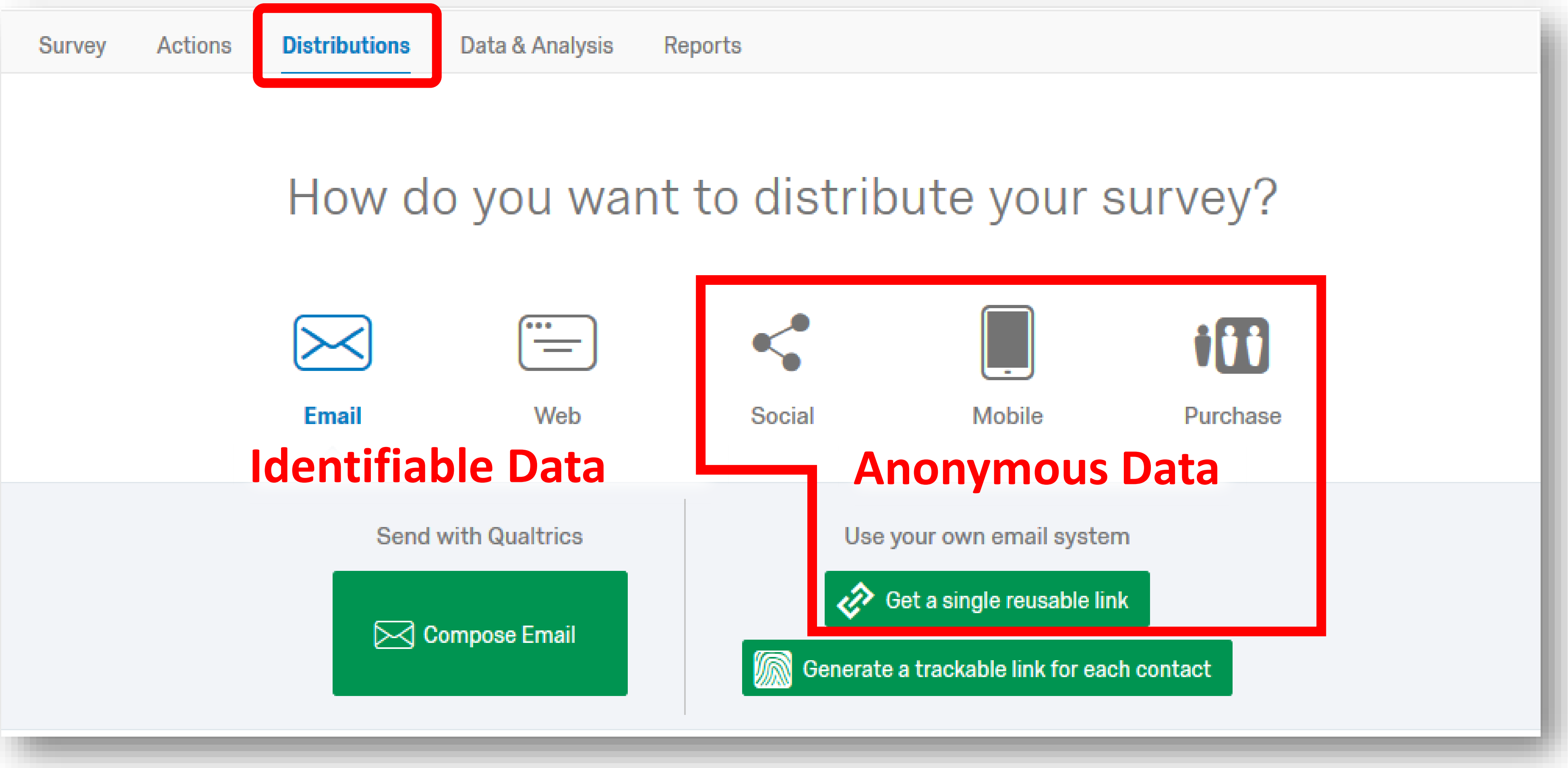
  People will answer even long surveys if they find it interesting!

http://www.washingtonpost.com/wp-srv/politics/polls/poll_response_rate.html

Distributions

Click on the **Distributions** tab to see your options for data collection.

This screen appears the first time you go to that section.



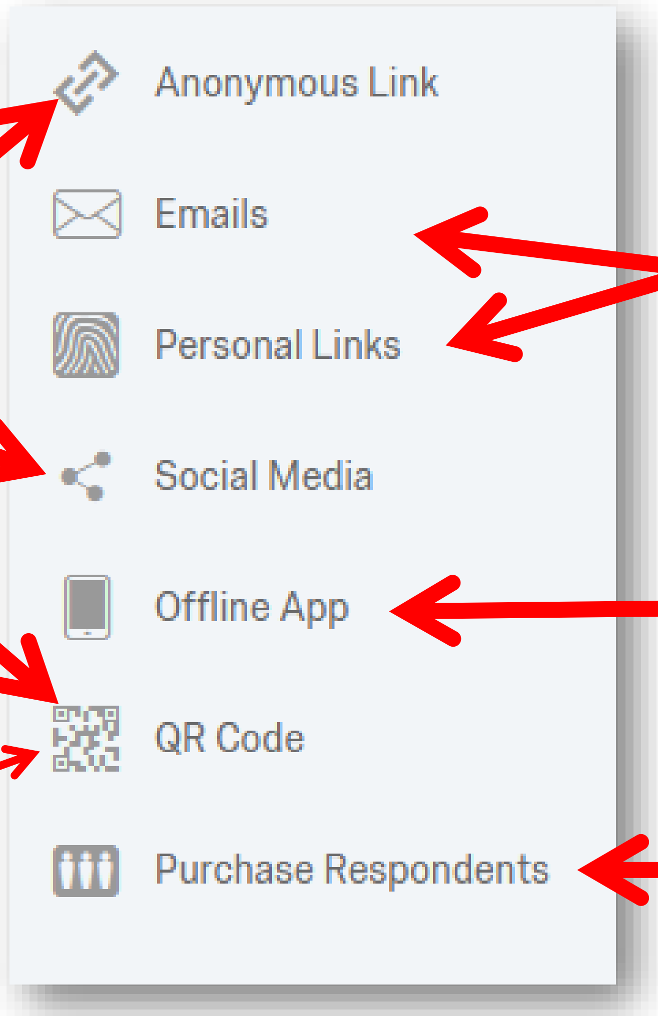
https://www.qualtrics.com/support/survey-platform/distributions-module/collecting-responses/

Methods

Methods - How To

Click on the **Distributions tab** to see your options for data collection.

This screen appears after you have selected a method.



Anonymous Data

Identifiable Data

Costs money, ask your admin

This helps you create a QR Code to distribute your survey. But, you can create your own.

Have Qualtrics find participants that meet your criteria, for a fee.

https://www.qualtrics.com/support/survey-platform/distributions-module/collecting-responses/

Methods - Individual Links

With The Qualtrics Mailer

Use the "**Email**" section to send out your survey invitation if you have **email addresses** for participants and want to make use of Qualtrics' tracking features.

Create a "**Panels**" and type in or import people's email and any other information into a Panel spreadsheet. When sending the email, choose that panel.

As long as you don't anonymize the information in the survey options, you can see who hasn't responded and send reminders just to those people.

The default message gives you several "**variables**" to include the link to the survey in your email. You should use them. Just write your email around those variables.

Follow this link to the Survey:
${l://SurveyLink?d=Take the survey}

Or copy and paste the URL below into your internet browser:
${l://SurveyURL}

Follow the link to opt out of future emails:
${l://OptOutLink?d=Click here to unsubscribe}

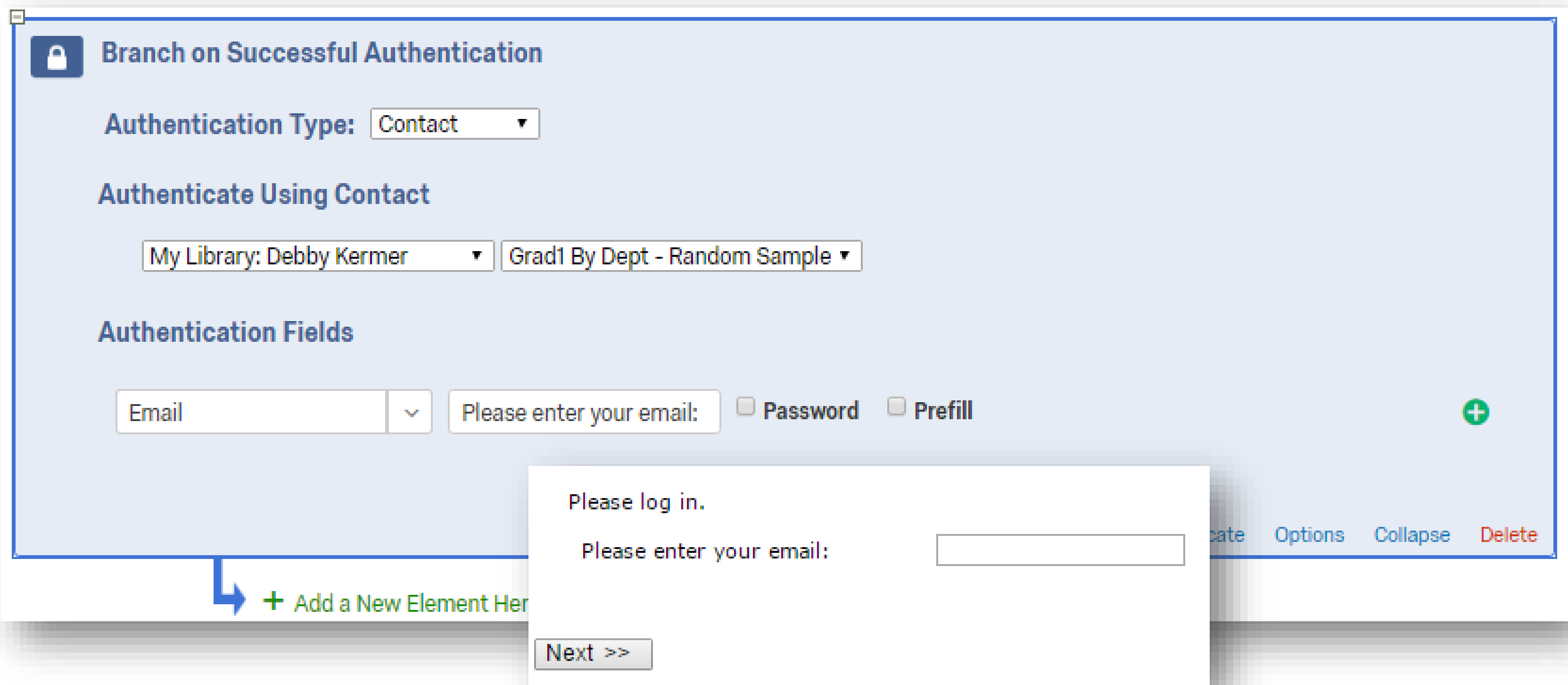
https://www.qualtrics.com/support/survey-platform/distributions-module/email-distribution/emails/emails-overview/

Methods - Authenticator Value

Anonymous Link with Authenticator value. Set this up in Survey Flow.

You will send out the same [anonymous] link to everyone but ask participants to "log in" with a value you have loaded into Qualtrics (e.g., an id).

This may be a good option If you do not have email addresses, but you do have another identifier. Or, if your participants will be suspicious of "tracking links" but don't mind entering a unique value they've been assigned.



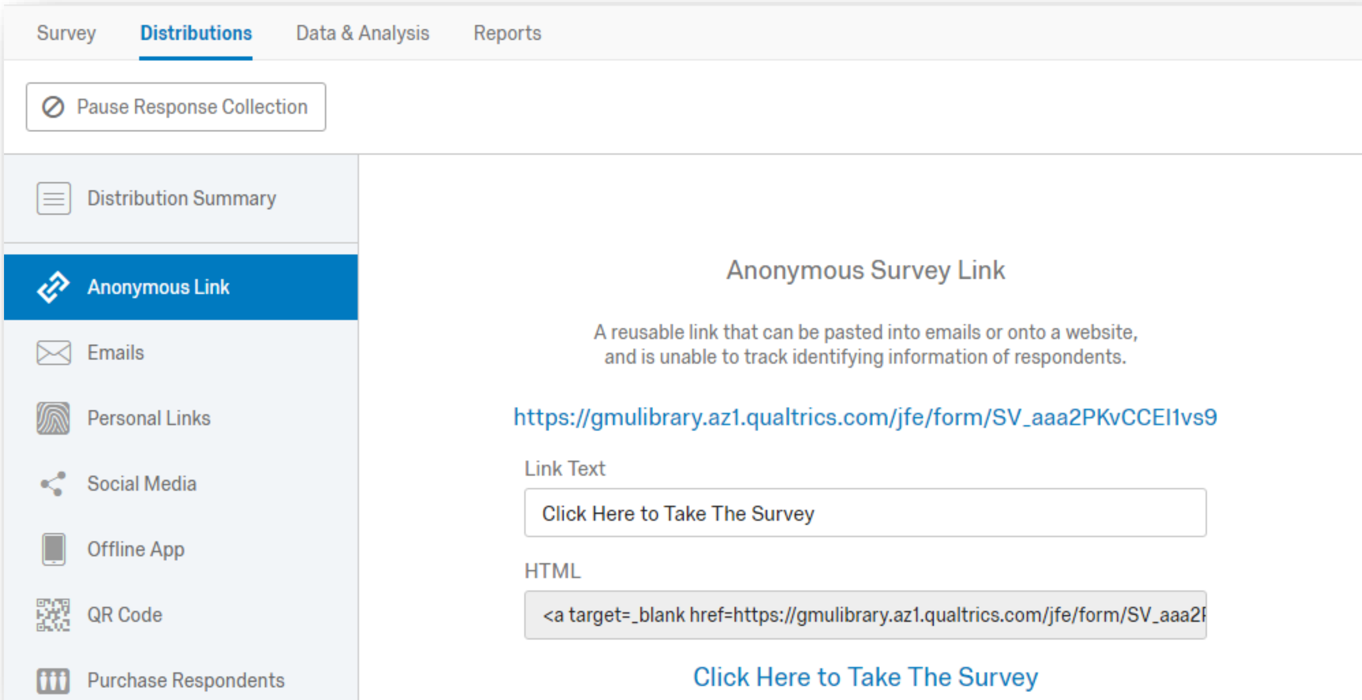
https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/advanced-elements/authenticator/authenticator-overview/

Methods - Anonymous Link

This is the simplest distribution method: give the **same URL** to all participants.

I recommend that you leave it as a URL and ***not*** customize the link or use a shortener. This is less suspicious and makes it clear that you are using Qualtrics.

The Social Media section gives you anonymous links with embedded data (see other slide) that allows you to know which site they came from.



https://www.qualtrics.com/support/survey-platform/distributions-module/web-distribution/anonymous-link/

Anonymity with Multiple Surveys

- Assign participants a code
  - Be prepared for participants to lose or forget it. You may need to describe how you are protecting the link between their identity and the code.
  - Qualtrics can also generate (and display) a random code

- Have participants choose their own code or alias
  - Let them know when they will have to use the same code or alias again.
  - If spaces or capitalization are or ore not important, say so.
  - Think about providing guidelines as to length or uniqueness.

- Have participants

Option 2: Use Questions to Make a Code

Option 2:
Have participants generate a code

- What are the first 2 letters of the city you were born in?
- What day of the month were you born?

- The information is easily remembered and does not change
- The information is not specific enough to identify a person
- The information varies across YOUR participants (letters are better than numbers, but if all your participants are born nearby, then city name won't vary as much)

Features

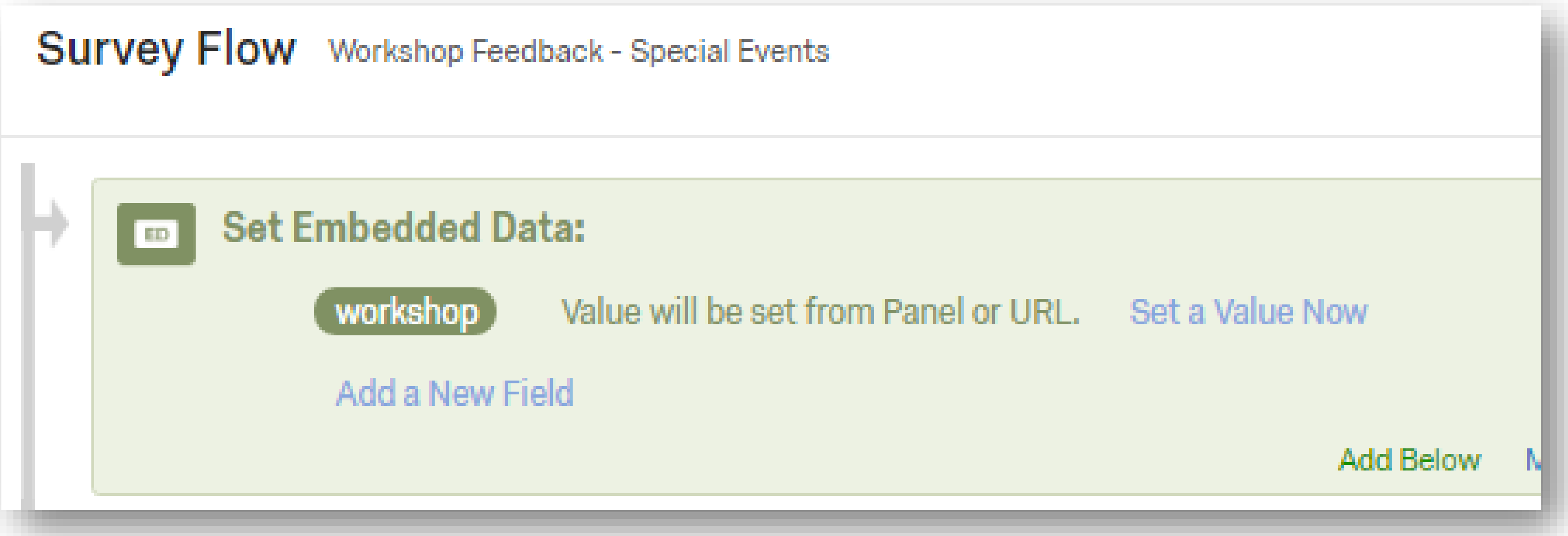
Embedded Data

Like a hidden question, embedded data lets you set values you can use for data analysis or in question wording (e.g., Piped Text).

One use is to **track where or why** the survey was taken. When you distribute the URL, you can add information to the end (note, participants will see this), for example:

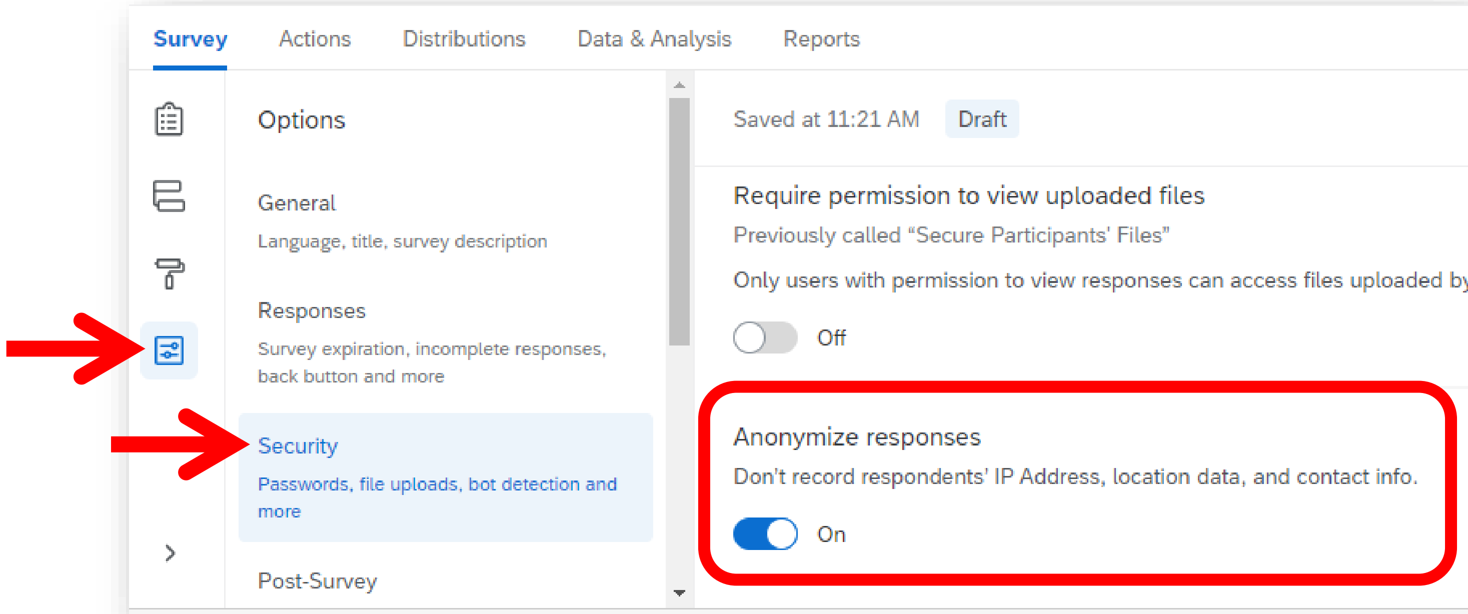
https://gmulibrary.az1.qualtrics.com/SE/?SID=SV_aWrgMsi84rjZ**&workshop=stata**

In **Survey Flow**, you must have Qualtrics save this information as a variable with **Set Embedded Data**. Do NOT use this method to track individuals, that is personal links.



https://www.qualtrics.com/support/integrations/api-integration/passing-information-through-query-strings
https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/standard-elements/embedded-data/

Anonymity



Anonymous Links

This will delete the respondent's IP address and location data *when submitted*

Individual Links

This will *also* delete any connection to the contact list.
You will know who has responded but not which response is from which person.

However, you could probably figure it out if you wanted, so it is less trusted.

https://www.qualtrics.com/support/survey-platform/edit-survey/survey-options/survey-termination/#AnonymizingResponses#AnonymizingResponses

Save & Continue

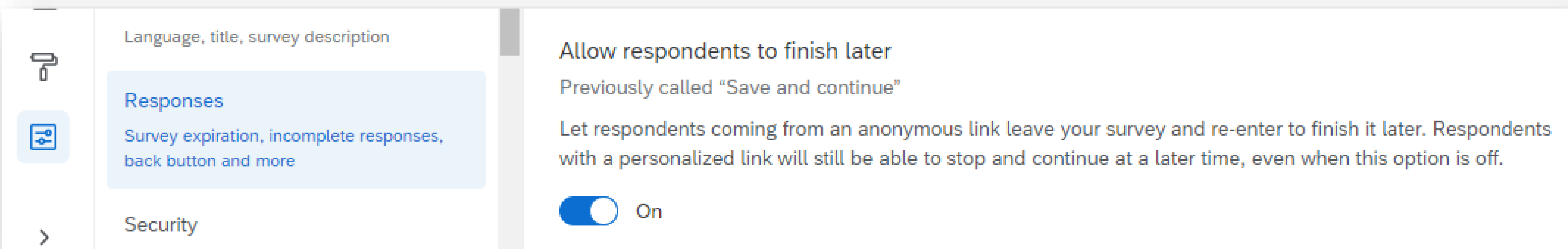
Especially if your survey is long, people may want or need to stop and resume later.

Individual Links

Participants can **easily** use their personal link to resume the survey. You may want to Inform participants that responses are not saved until the page is submitted. Specify when responses will be marked completed in **Partial Completion**. You can also close them individually or when you deactivate the survey.

Anonymous Links

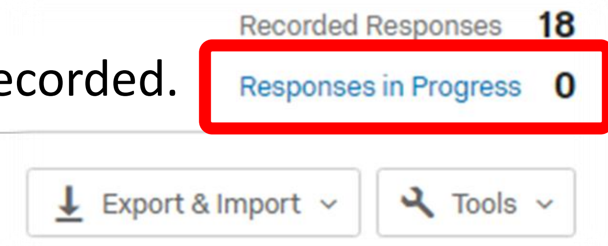
If "Allow respondents to finish later" is On, Qualtrics will *attempt* to allow save and resume by setting a browser cookie. This is **unreliable** because cookies get deleted and only work from the same computer.

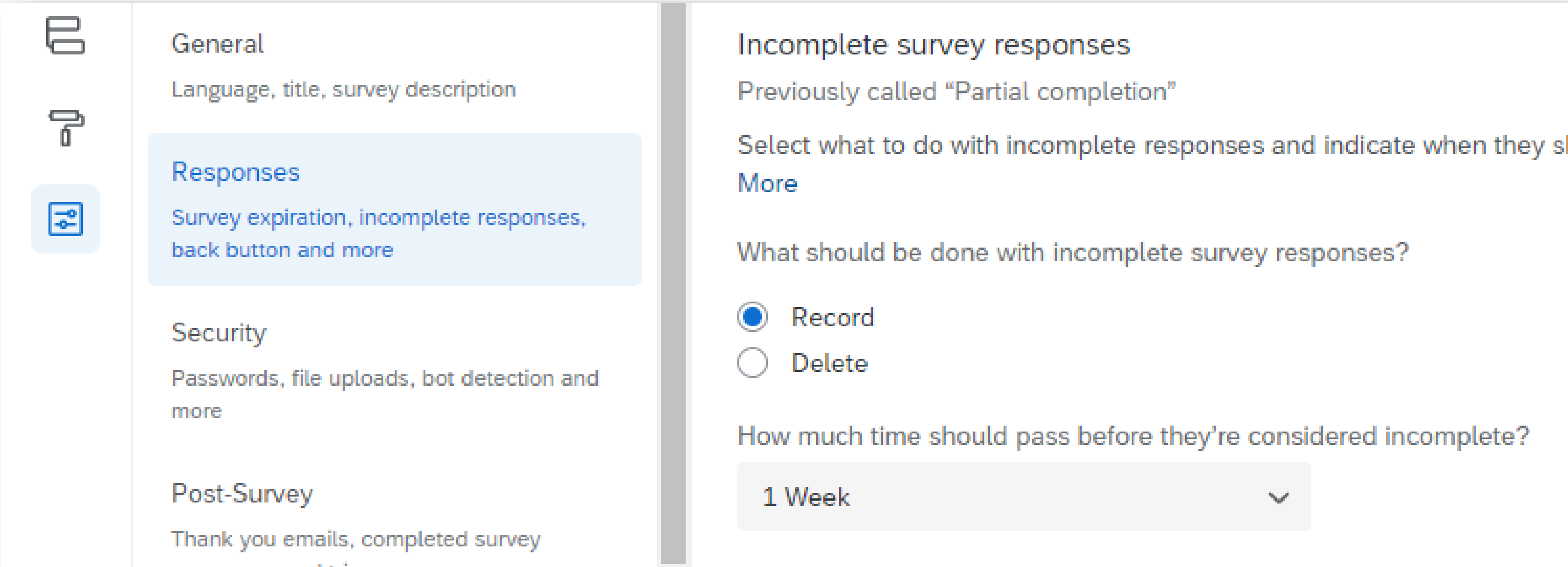


https://www.qualtrics.com/support/survey-platform/survey-module/survey-options/survey-experience/#AllowingRespondentsToSaveProgress

Incomplete Responses

Click **Responses in Progress** to see data that has not been recorded.



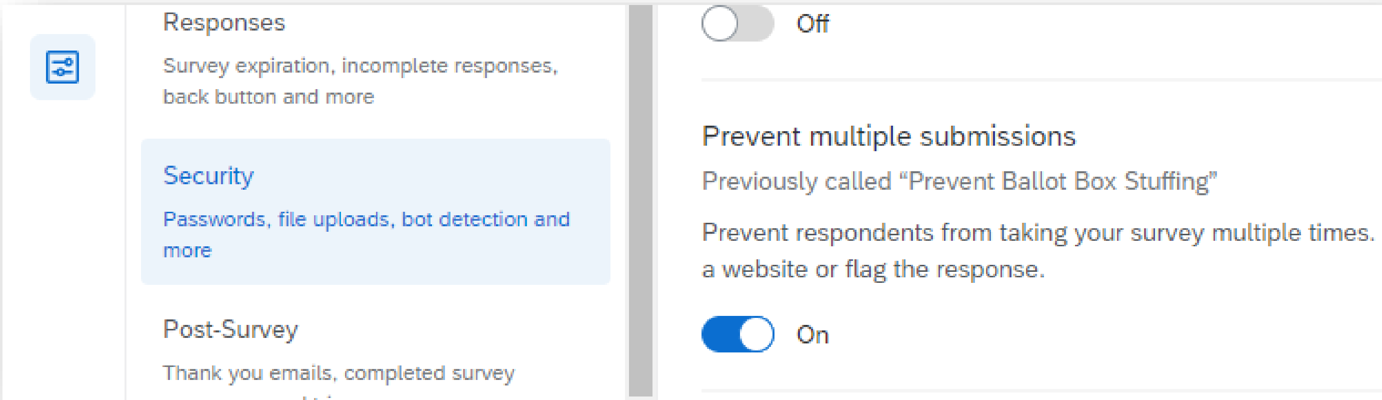


Set when they get transferred to "Recorded Responses" in **Survey Options**.
With anonymous surveys in which Save and Continue is unlikely, you may want to set this to be a shorter period of time. For identifiable surveys, you may want this longer.

https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data/responses-in-progress

Other Options

Prevent multiple submissions is unreliable and may prevent multiple people from the same household from completing your survey. It also uses cookies.



Final Thoughts

Be nice to the respondent

They are doing you a **favor**

- by *taking* the survey
- by answering each question *thoughtfully*
- by answering each question *truthfully*

They **want**

- to feel *valued* for their time
- to feel *safe* and *secure* in their privacy
- to feel like their efforts will *matter*

For more assistance…

http://**infoguides**.gmu.edu/**survey**

http://infoguides.gmu.edu/survey/qualtrics

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