

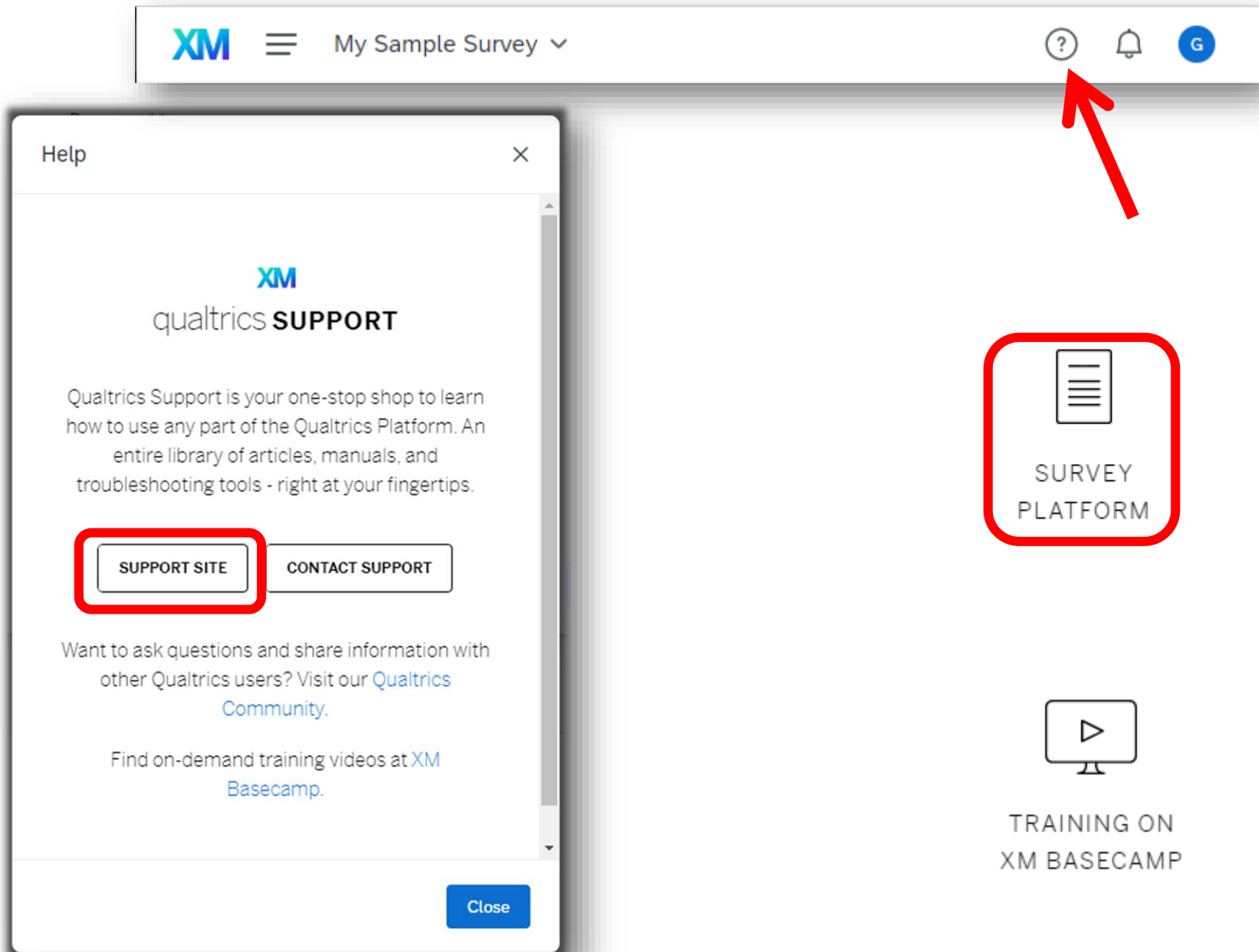
Using Qualtrics Effectively

by Debby Kermer

George Mason University Libraries

Digital Scholarship Center

Use the Help



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

Tutorials

The screenshot displays the Qualtrics user interface. On the left is a vertical navigation menu with the following items: 'Getting Started with Qualtrics', 'Individual User Account Settings', 'Survey Projects' (highlighted in dark grey), and 'INFORMATION FOR SURVEY TAKERS'. Under 'Survey Projects', there is a sub-menu 'GETTING STARTED' which includes 'Projects Basic Overview' (highlighted in light grey), 'Survey Basic Overview', 'Actions Basic Overview', 'Distributions Basic Overview', 'Data & Analysis Basic Overview', 'Results vs. Reports', 'Results-Reports Basic Overview', 'Advanced-Reports Basic Overview', 'Contacts Basic Overview', 'Library Basic Overview', and 'Admin Basic Overview'. A 'Feedback' button is located on the left side of the menu. The main content area is titled 'Projects Basic Overview' and features the Qualtrics logo. Below the title is a section 'WHAT'S ON THIS PAGE:' with a list of topics: 'About the Projects Page', 'Selecting Your Project Type', 'Creating New Projects', 'Organizing, Viewing, Searching, & Sorting Projects', 'Collaborating On Projects', and 'FAQs'. The 'About the Projects Page' section contains a paragraph explaining that all Qualtrics sessions begin on the 'Projects' page, which lists all XM projects. Below the text is a screenshot of the Qualtrics 'Projects' page interface, showing a sidebar with 'Projects' selected, a main dashboard with statistics (0 active tickets, 18 tickets over 24 hours, 0 tickets in 24 hours, 0 minutes resolution time), and a 'Create new project' button. The bottom of the page shows the 'SURVEY TAB' and 'ACTIONS TAB'.

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

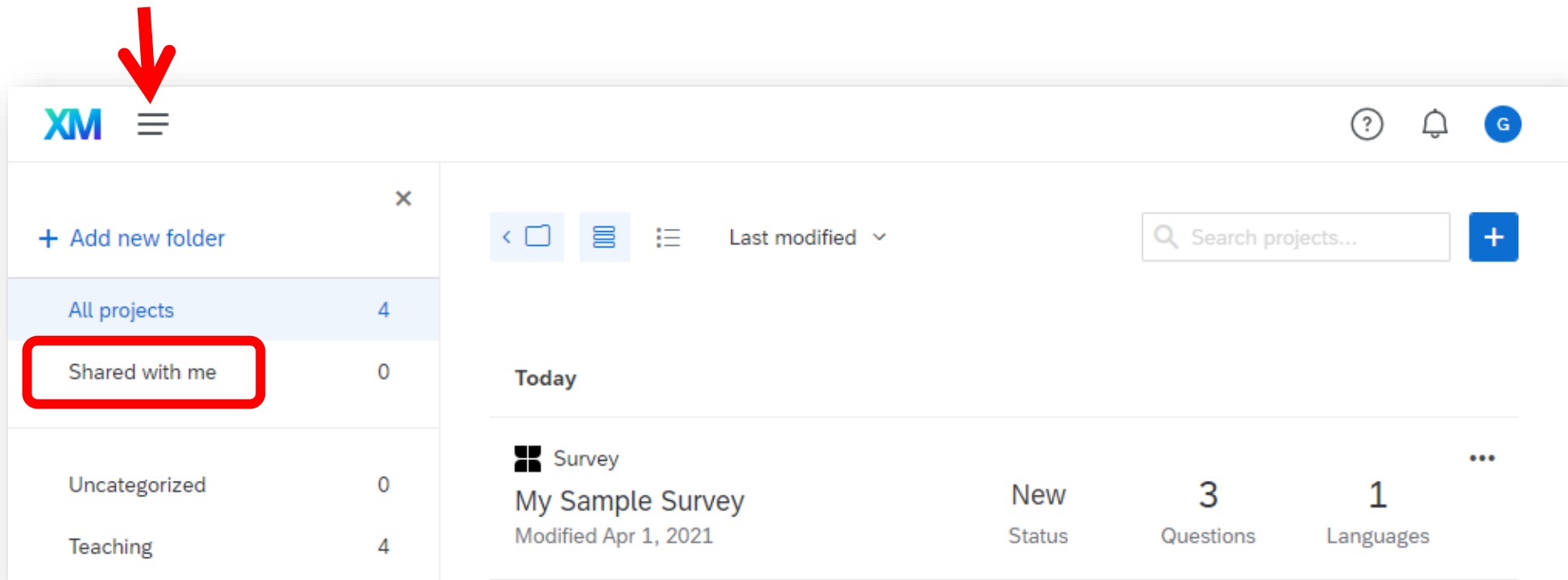
Main Screen

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.

The image shows a screenshot of the SurveyMonkey interface. At the top, there's a header for 'Survey' with 'My Sample Survey' and a star icon, followed by 'Modified Apr 1, 2021'. To the right, there are statistics: 'New Status', '3 Questions', and '1 Languages'. A red arrow points to a three-dot menu icon in the top right corner. This menu is open, showing a list of actions: 'Activate', 'Collaborate', 'Reveal in folder', 'Rename project', 'Copy project', 'Edit survey', 'Preview survey', 'Translate survey', 'Distribute survey', 'Data & Analysis', 'View reports', and 'Delete project'. The 'Copy project' and 'Delete project' options are highlighted with green boxes. Below this, there's a navigation bar with the 'XM' logo, a hamburger menu, and 'My Sample Survey' with a dropdown arrow. The navigation bar has tabs: 'Survey' (underlined), 'Actions', 'Distributions', 'Data & Analysis', and 'Reports'. The 'Distributions', 'Data & Analysis', and 'Reports' tabs are grouped together and highlighted with a purple box.

Navigation - Projects

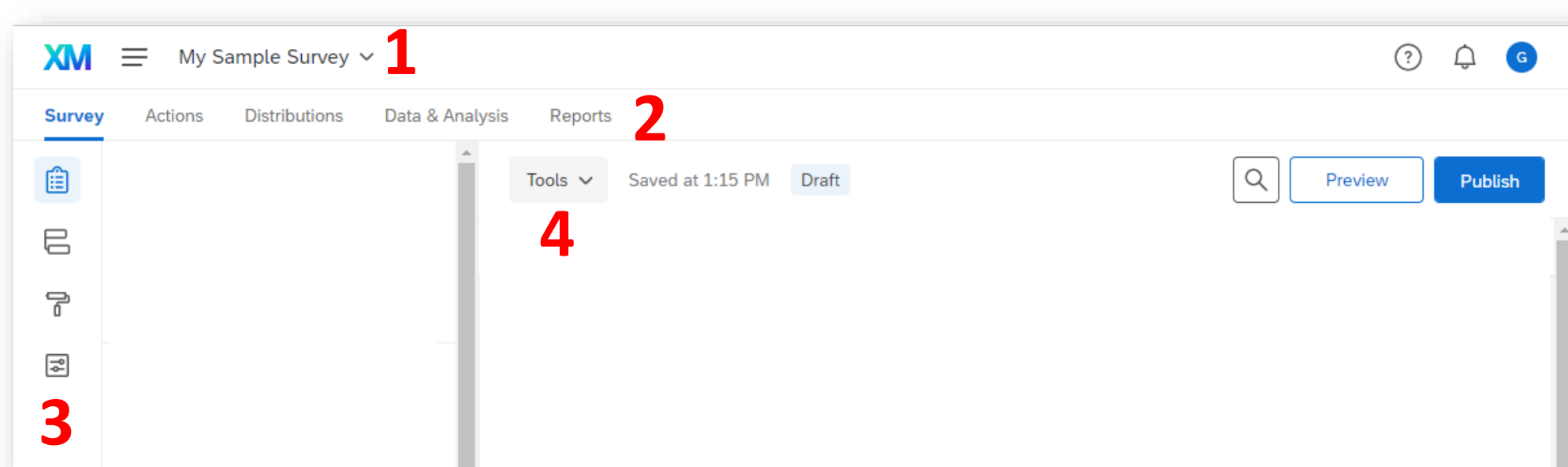
To edit the Survey, click a project or choose **Edit Survey** from the drop-down menu.

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

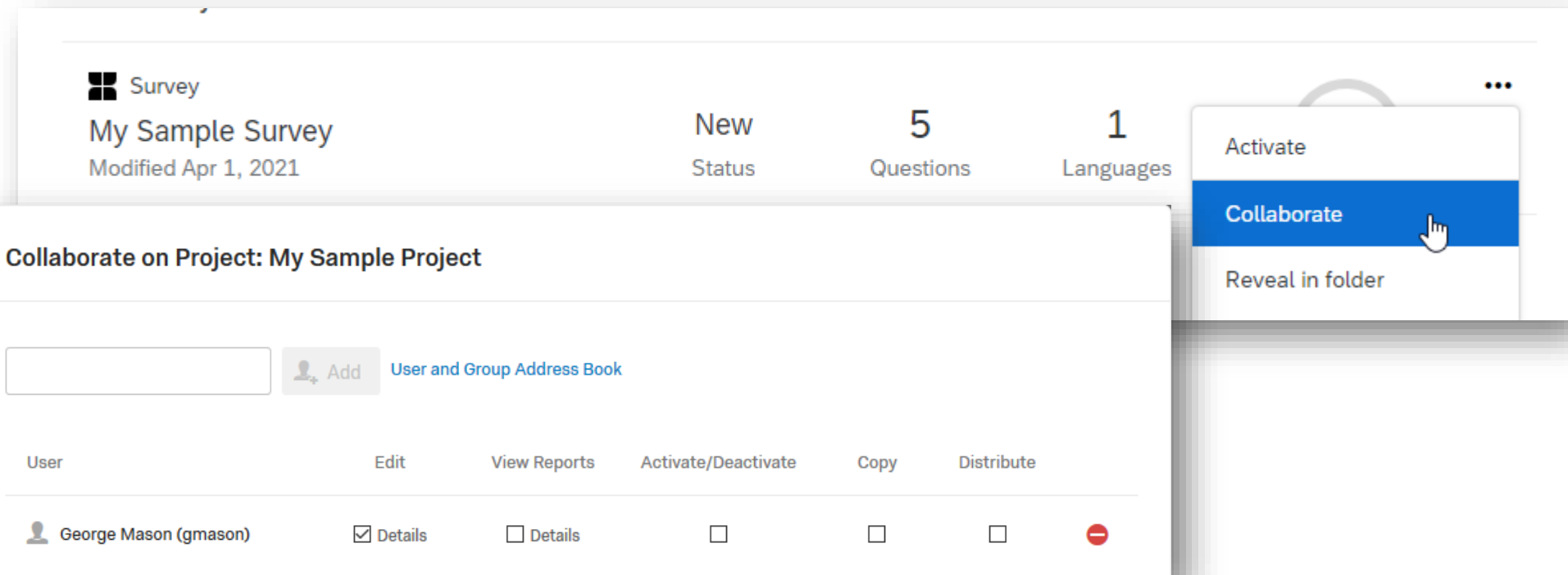
Collaboration

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.

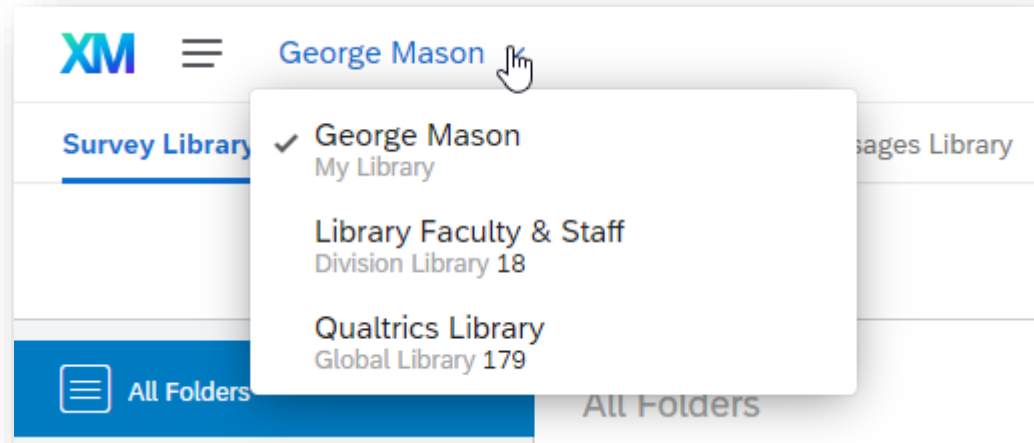
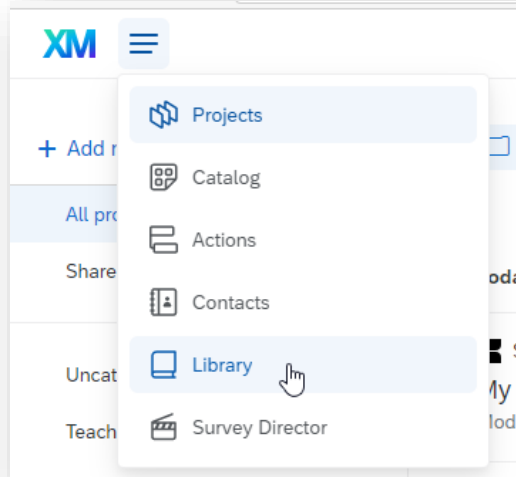


The screenshot displays the Qualtrics Survey platform interface. At the top, a header bar shows the 'Survey' icon, the title 'My Sample Survey', and the modification date 'Modified Apr 1, 2021'. To the right of the title, there are three status indicators: 'New Status', '5 Questions', and '1 Languages'. A dropdown menu is open on the right side of the header, showing three options: 'Activate', 'Collaborate' (highlighted with a blue background and a hand cursor), and 'Reveal in folder'. Below the header, a modal window titled 'Collaborate on Project: My Sample Project' is visible. It contains a text input field, an 'Add' button with a person icon, and a link to 'User and Group Address Book'. Below this, there is a table with columns for 'User', 'Edit', 'View Reports', 'Activate/Deactivate', 'Copy', and 'Distribute'. The table lists one user, 'George Mason (gmason)', with checkboxes for 'Details' and 'Activate/Deactivate', and buttons for 'Copy' and 'Distribute'. A red minus button is also present at the end of the row.

User	Edit	View Reports	Activate/Deactivate	Copy	Distribute
George Mason (gmason)	<input checked="" type="checkbox"/> Details	<input type="checkbox"/> Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Libraries

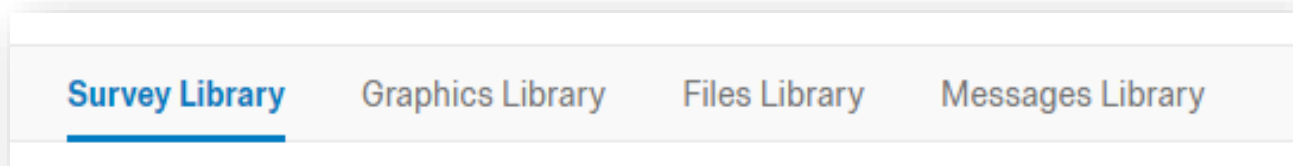
You can **store** and **retrieve** survey elements in the various Qualtrics' Libraries.



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

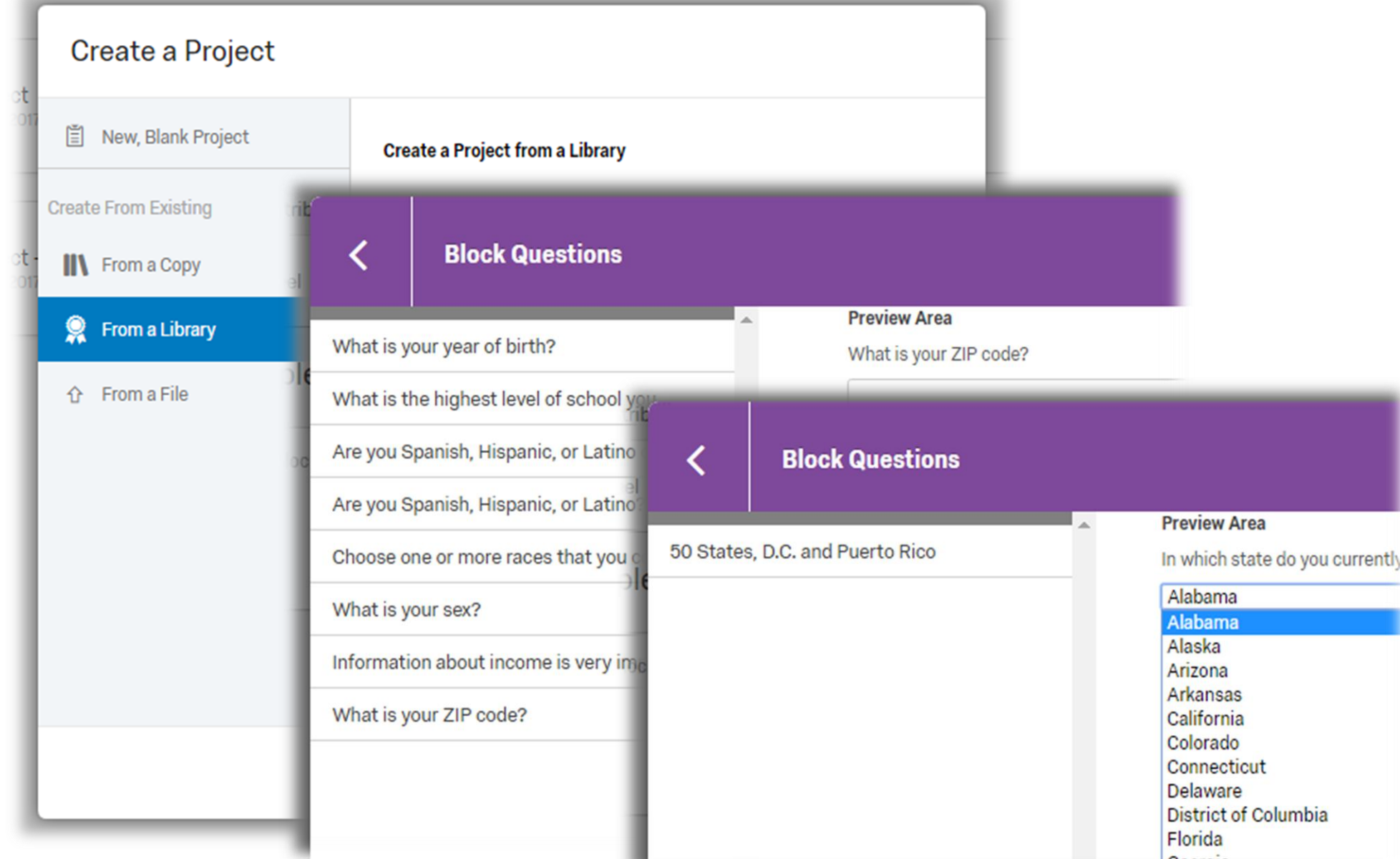
You can also store elements in your **personal** Library to more easily find and reuse.

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.



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.

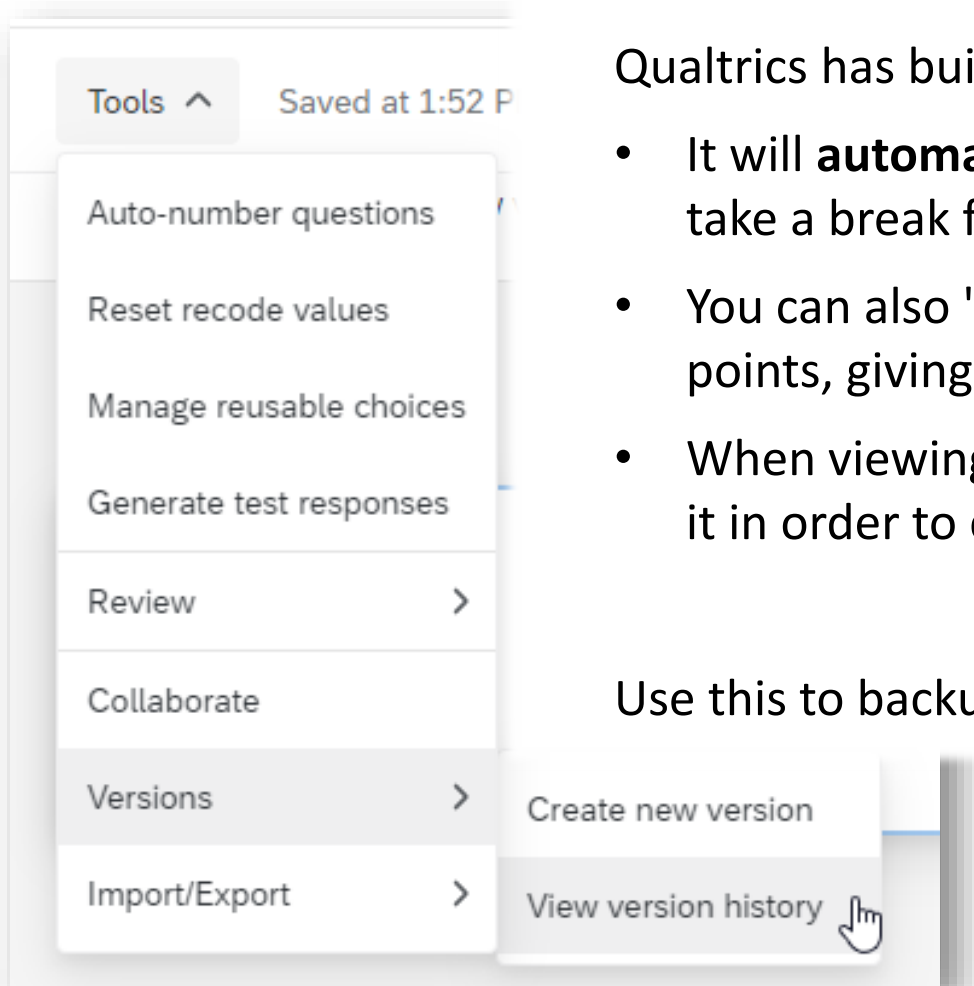
Backups



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.



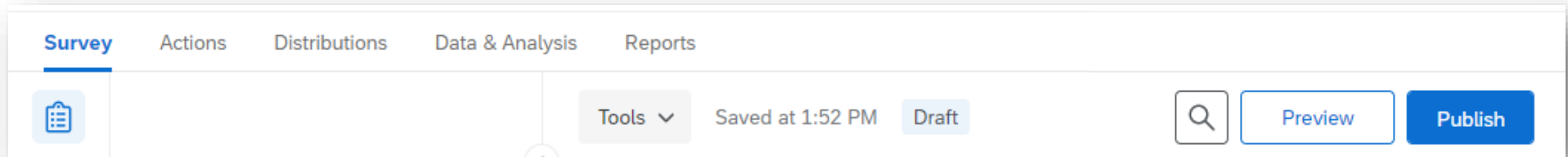
Publishing

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

The screenshot shows the Qualtrics interface with the 'Tools' menu highlighted in a red box. The 'Tools' menu is open, showing options: Auto-number questions, Reset recode values, Manage reusable content, Generate test responses, Review, Collaborate, Versions, and Import/Export. The 'Import/Export' option is selected, and a sub-menu is displayed with the following options: Print survey, Import survey, Export survey, and Export survey to Word. A hand cursor is pointing at the 'Print survey' option.

Tools ^ Save

Auto-number questions

Reset recode values

Manage reusable content

Generate test responses

Review

Collaborate

Versions

Import/Export >

Print survey

Import survey

Export survey

Export survey to Word

How long have you been using the Internet (including using e-mail, gopher, ftp, etc.)?

☐ Less than 6 months

☐ 6 to 12 months

☐ 1 to 3 years

☐ 4 to 6 years

☐ 7 years or more

How frequently do you access the web from the following locations?

	Daily	Weekly	Monthly	Less than once a month
From home (including a home office) (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
From work (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
From school (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
From a public terminal (e.g. library, cybercafe, etc.) (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Export Survey to Word
enables the Researchers View

The screenshot shows the Qualtrics interface with the 'Export Survey to Word' dialog box open. The dialog box contains the following text: 'When exporting your survey to Word, question presentation may be different and may not reflect all formatting customizations.' Below this text are four checkboxes: 'Show Question Numbers' (checked), 'Show Logic' (checked), 'Show Coded Values' (checked), and 'Strip HTML Tags from all Questions and Answers' (checked). At the bottom right of the dialog box are 'Cancel' and 'Export' buttons.

Q12 How long have you been using the Internet (including using e-mail, gopher, ftp, etc.)?

☐ Less than 6 months (1)

☐ 6 to 12 months (2)

☐ 1 to 3 years (3)

☐ 4 to 6 years (4)

☐ 7 years or more (5)

Q13 How frequently do you access the web from the following locations?

	Daily (1)	Weekly (2)	Monthly (3)	Less than once a month (4)	Never (5)
From home (including a home office) (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
From work (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
From school (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
From a public terminal (e.g. library, cybercafe, etc.) (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Export Survey to Word

When exporting your survey to Word, question presentation may be different and may not reflect all formatting customizations.

☒ Show Question Numbers

☒ Show Logic

☒ Show Coded Values

☒ Strip HTML Tags from all Questions and Answers

Cancel Export

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.

Q1

1. How often do you go to the Library?

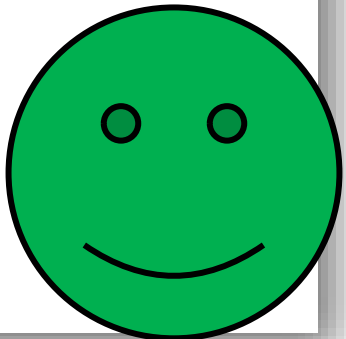
- ☐ 1 - Never
- ☐ 2 - Rarely
- ☐ 3 - Sometimes
- ☐ 4 - Often



lib_use


How often do you go to the Library?

- ☐ Never
- ☐ Rarely
- ☐ Sometimes
- ☐ Often



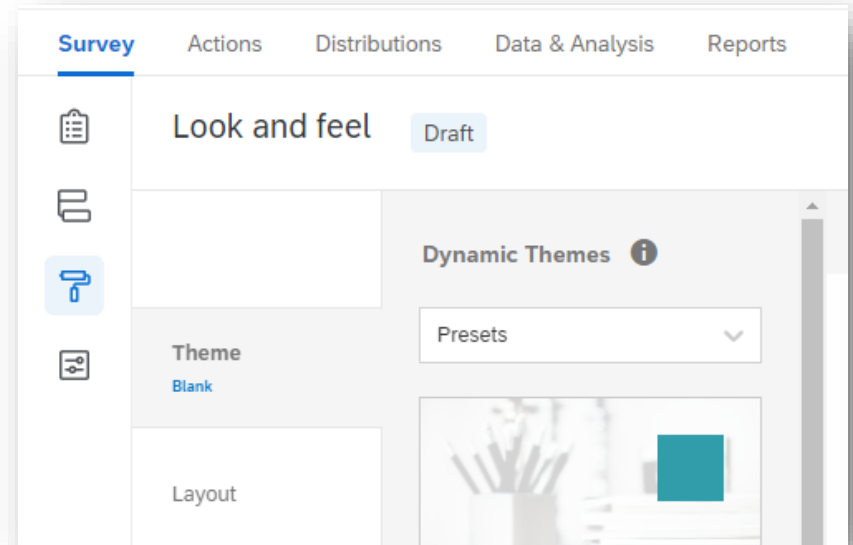
☐ Rich Content Editor... Piped Text...

How often do you go to the Library?

 Edit Question Label: How often do you go to the Library?

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.

A screenshot of a survey question titled 'What is your status?'. The question has five radio button options: 'Undergraduate Student', 'Graduate Student' (which is selected and highlighted in red), 'Faculty', 'Staff', and 'Other'. Below the options is a text input field.

Look and Feel - Layout

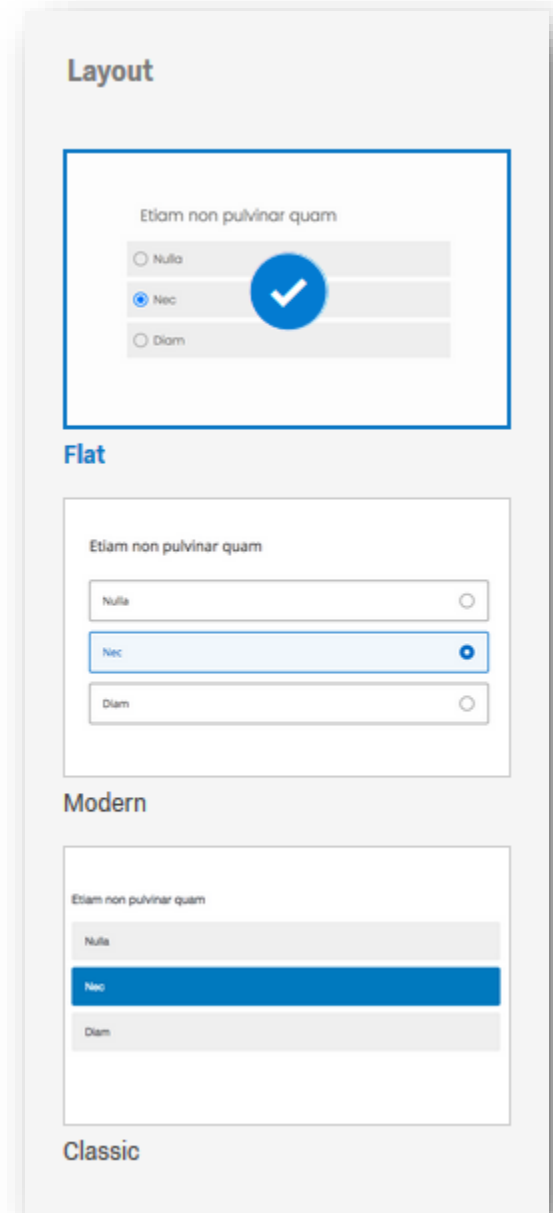
You can choose which layout best fits your questions.

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.

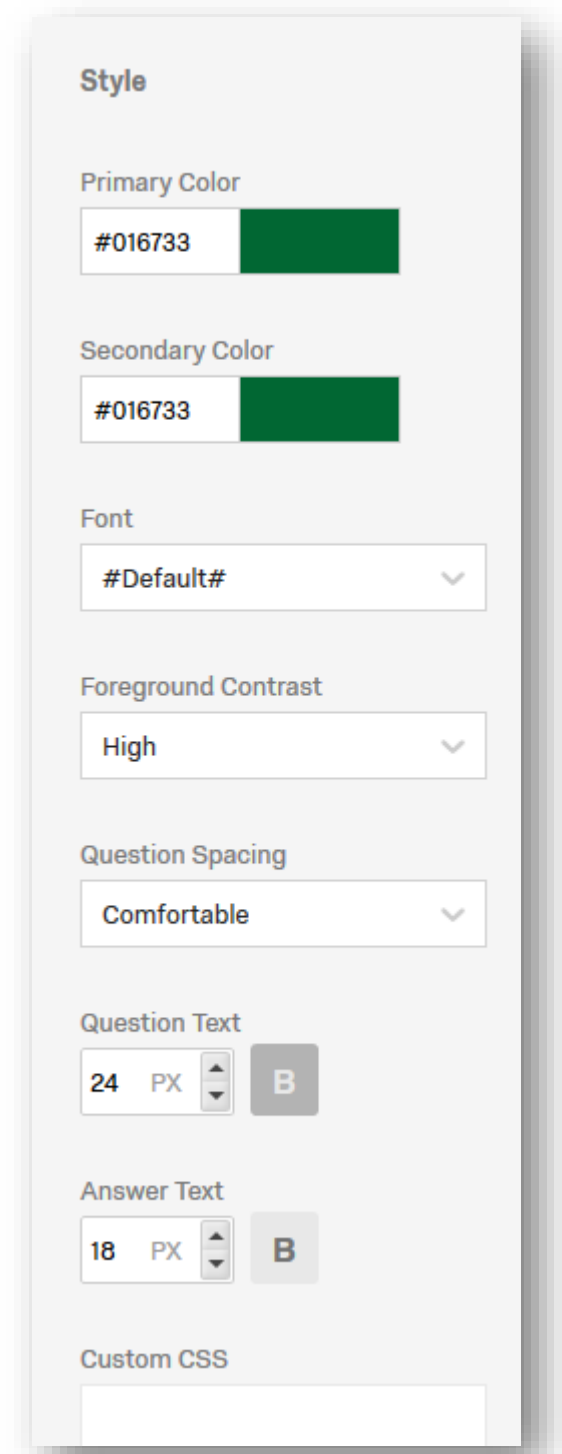
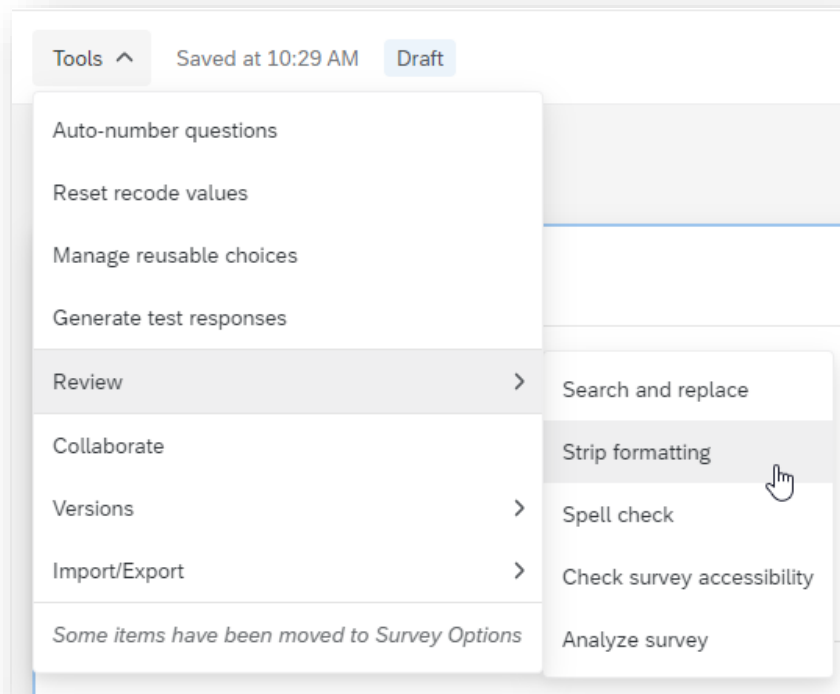


Look and Feel – Style

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

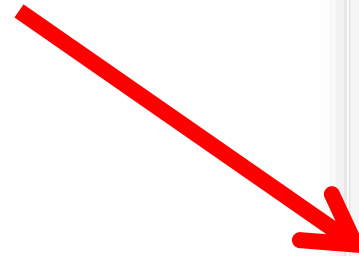
Instead, use **Look and Feel**.

Strip formatting from selected questions to standardize.



Look and Feel – CSS

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



Style

Primary Color
#016733

Secondary Color
#016733

Font
Default

Foreground Contrast
High

Question Spacing
Comfortable

Question Text
24 PX B

Answer Text
18 PX B

Custom CSS

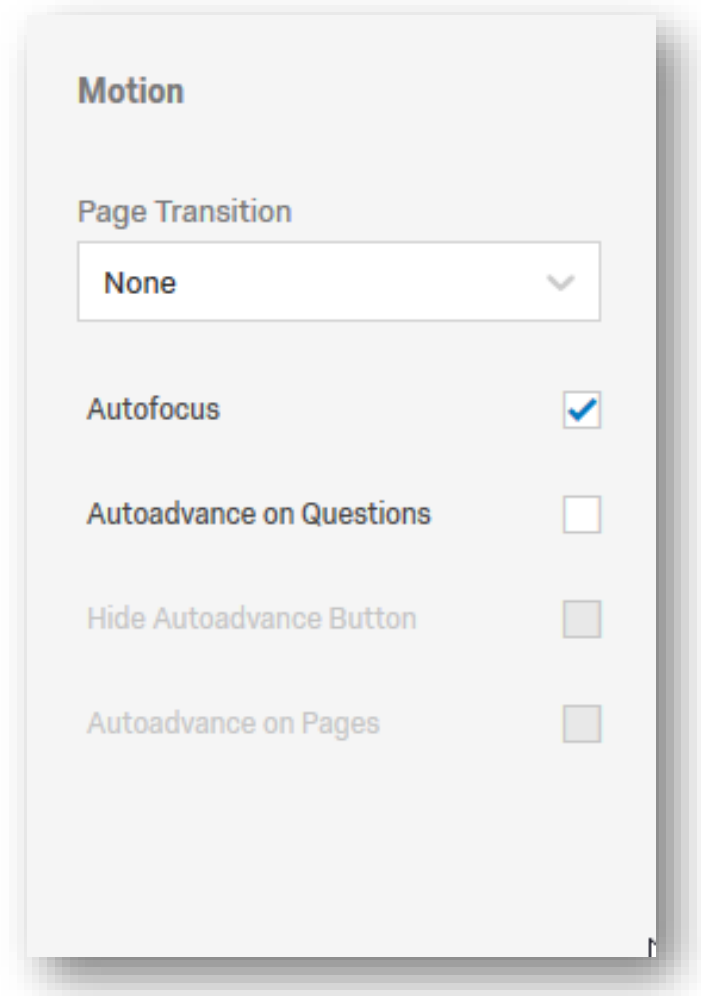
edit

External CSS

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.



The image shows a settings panel titled "Motion". It contains the following options:

- Page Transition**: A dropdown menu currently set to "None".
- Autofocus**: A checkbox that is checked.
- Autoadvance on Questions**: An unchecked checkbox.
- Hide Autoadvance Button**: An unchecked checkbox.
- Autoadvance on Pages**: An unchecked checkbox.

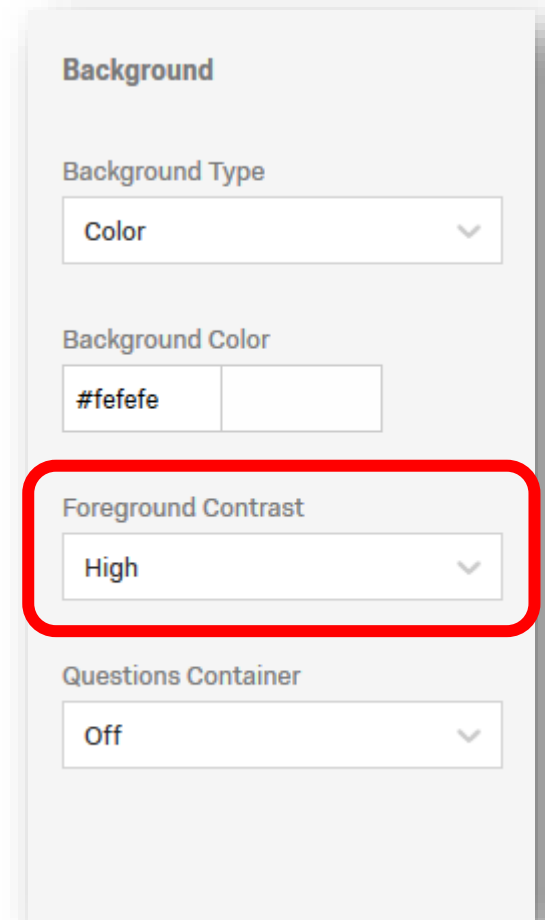
Look and Feel - Logo & Background

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.



The image shows a configuration panel for a survey. It has a light gray background and a subtle drop shadow. The panel contains several settings:

- Background**: A section header.
- Background Type**: A dropdown menu currently set to "Color".
- Background Color**: A text input field showing "#fefefe" next to a small color swatch.
- Foreground Contrast**: A dropdown menu currently set to "High". This entire section is enclosed in a red rectangular border.
- Questions Container**: A dropdown menu currently set to "Off".

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>

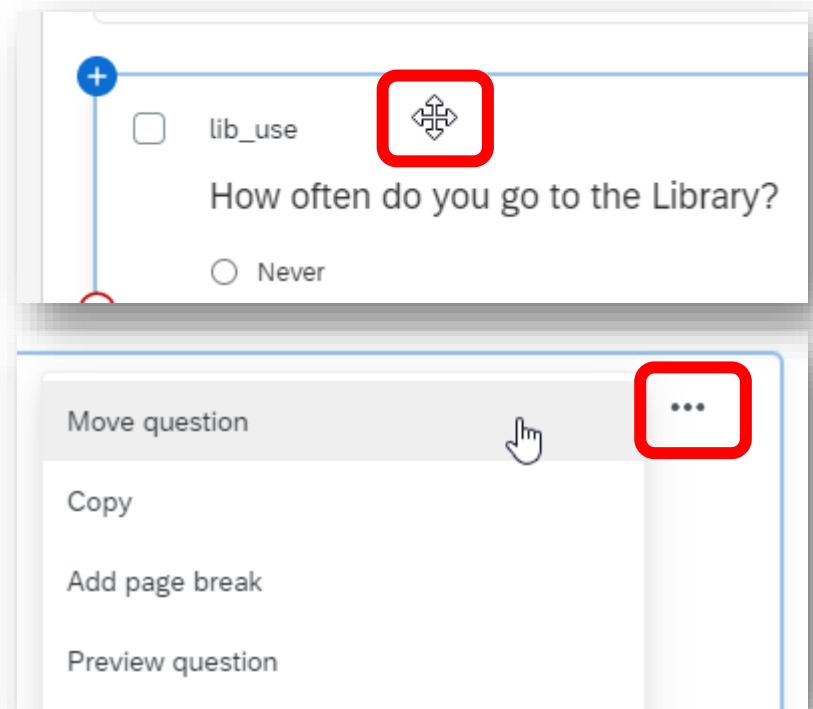
<http://www.dataunitwales.gov.uk/SharedFiles/Download.aspx?pageid=30&fileid=27&mid=64>

Moving Individual Questions

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

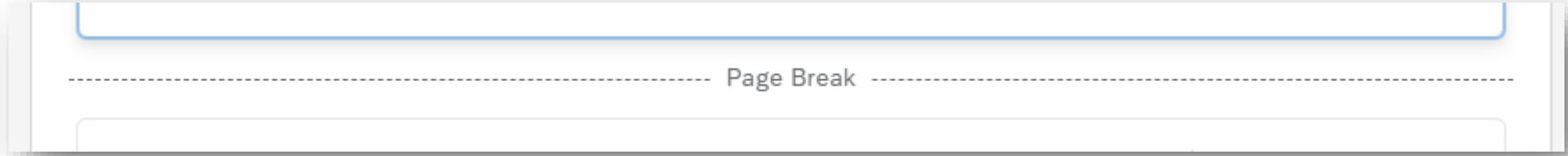
Use the **3-dots** for longer moves.

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



This screenshot shows the 'Move question to' dialog box. It has a title bar with a close button (X). The dialog contains three dropdown menus: 'Block' (set to 'Demographics'), 'Position' (set to 'Before'), and 'Question' (set to 'status What is your status?'). A hand cursor is pointing at the 'Demographics' dropdown. At the bottom right, there are two buttons: 'Cancel' and 'Confirm'.

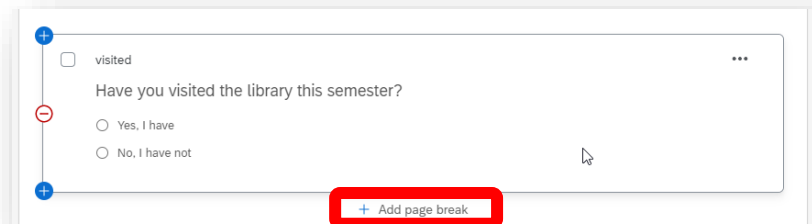
Page Breaks



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

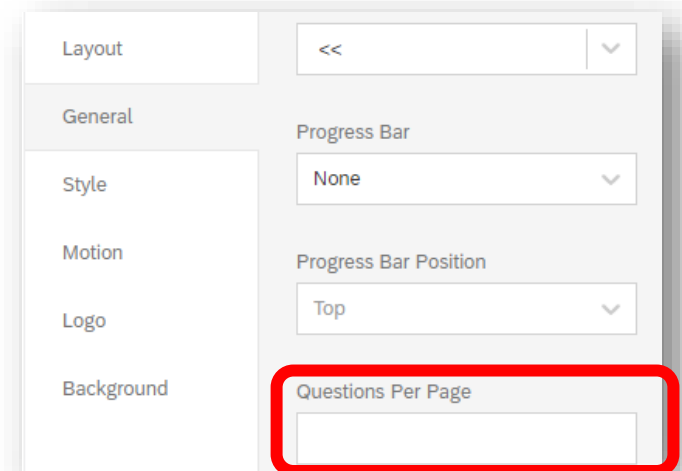
Why?

- ✓ 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 accidentally get closed (or the power could go out).



How?

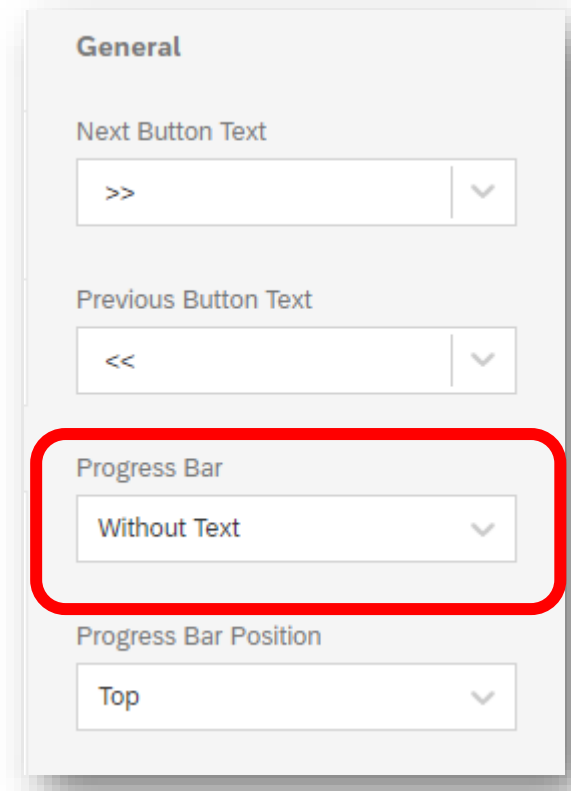
- ❑ Use **Blocks**. Adds a page break between.
- ❑ Hover to show "**Add Page Break**"
- ❑ Add after a question with the 3 dots
- ❑ Specify for the entire survey in **Look and Feel**
- ❑ Specify for a block in the **Block Options**
Advanced Randomization



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



General

Next Button Text
>>

Previous Button Text
<<

Progress Bar
Without Text

Progress Bar Position
Top

With Text



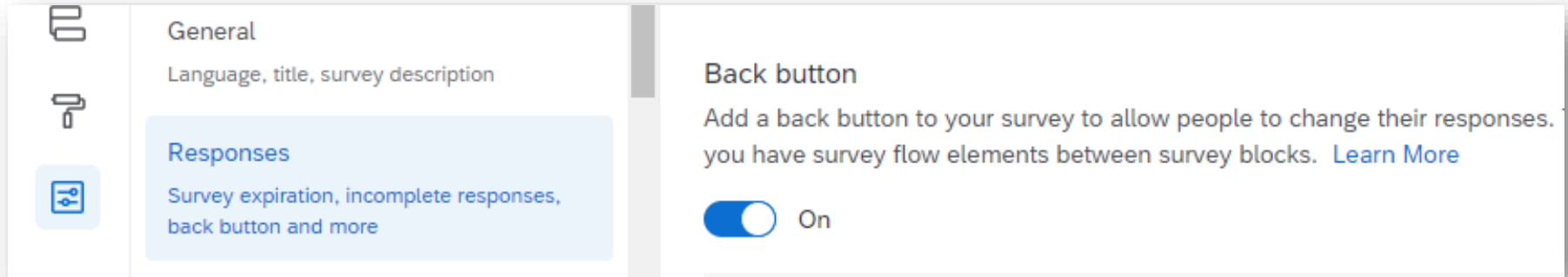
With Verbose Text



Survey Completion

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

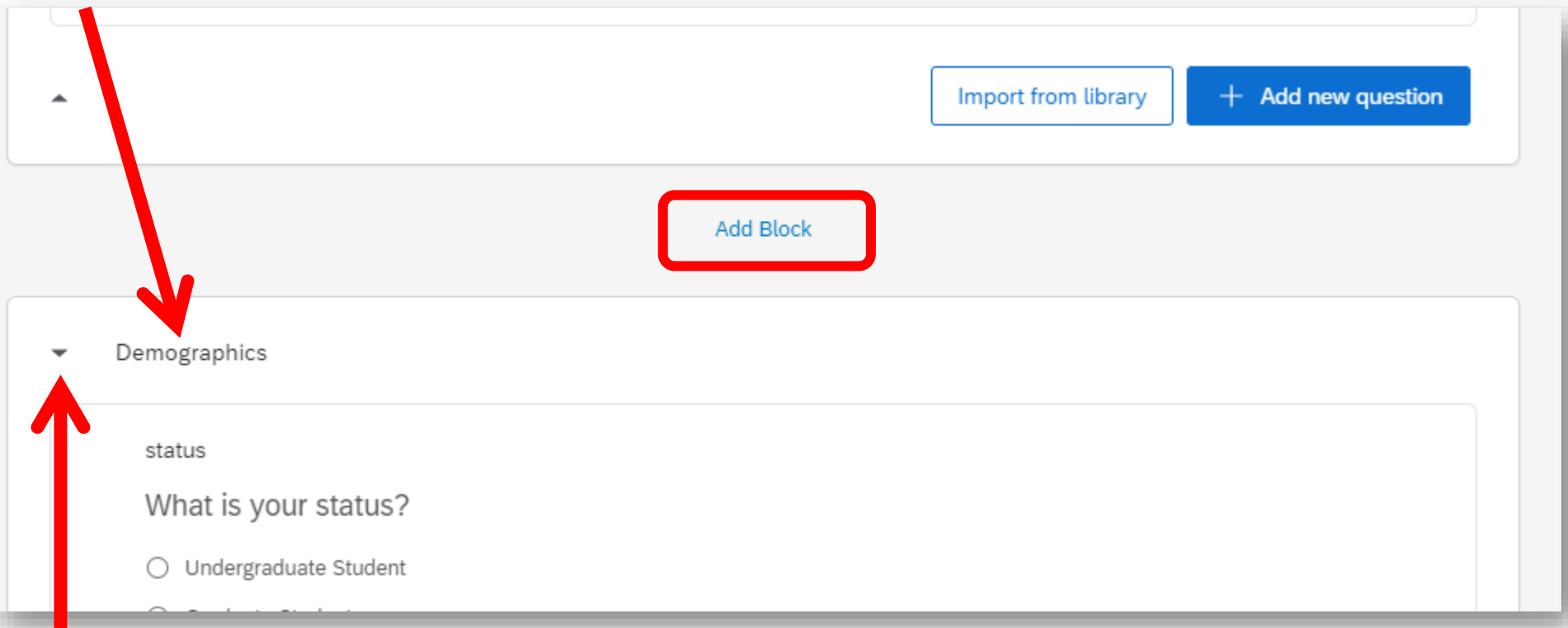
- If you want to remind participants of previous responses, use *Piped text* or *Carry Forward Choices* instead (discussed later)

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.

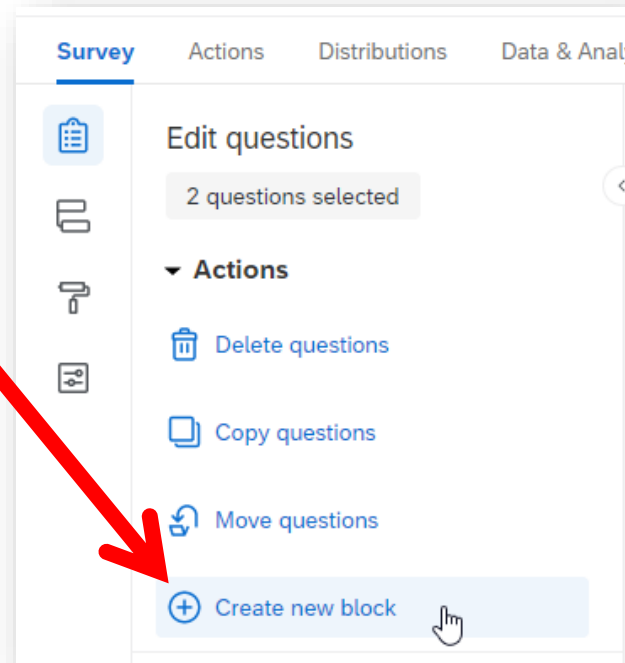
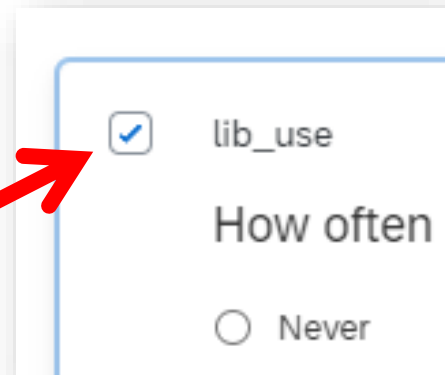
<https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/standard-elements/show-block/>

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

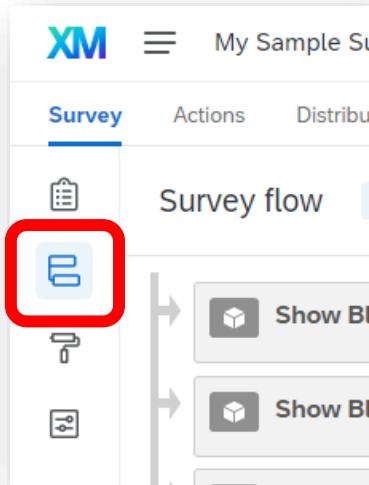
Quickly Grouping into Blocks

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**.

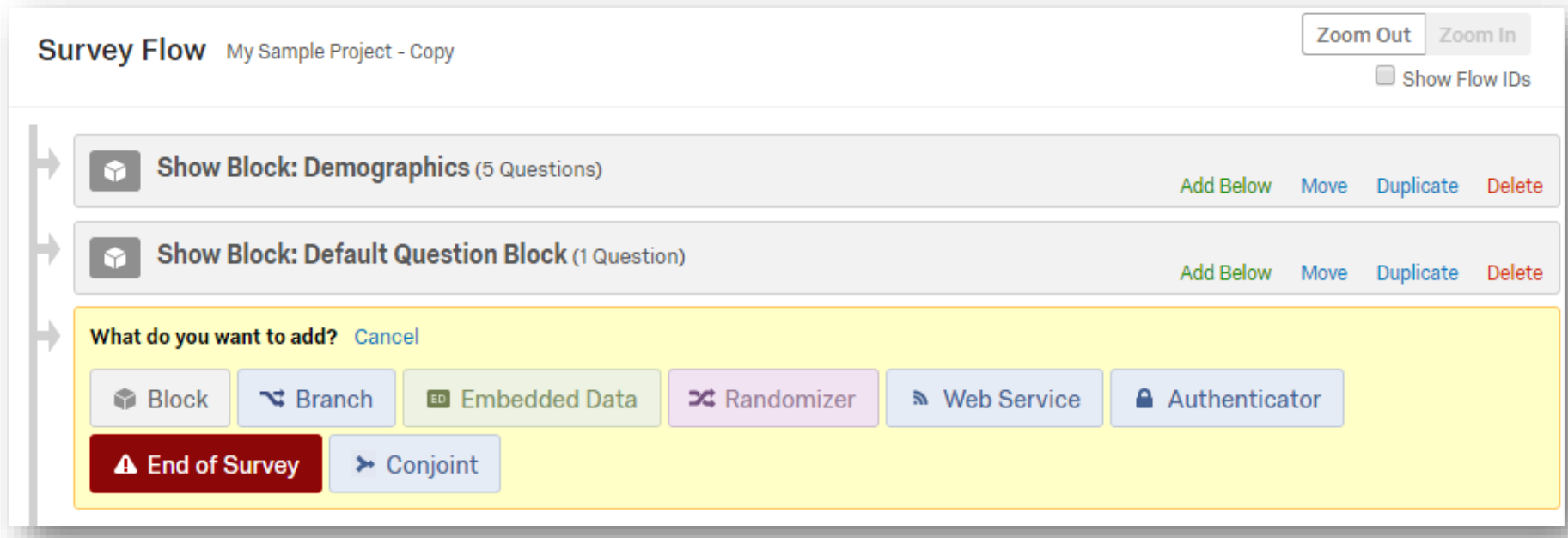


Survey Flow



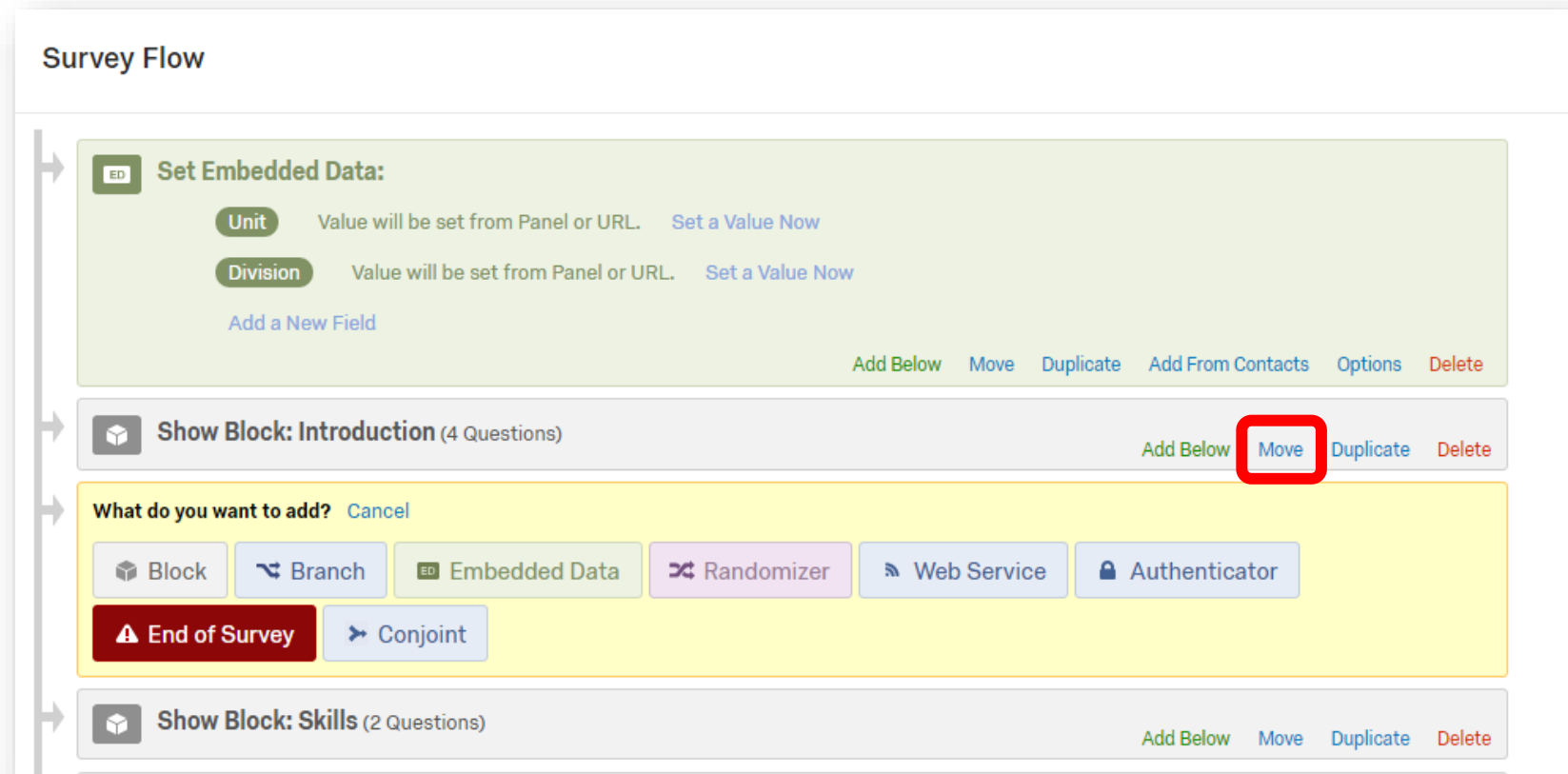
Survey Flow shows the **overall order** of your survey by showing the blocks.

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



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.





Survey Flow Elements

What do you want to add? [Cancel](#)


 Block

 Branch

 Embedded Data


 Randomizer

 Web Service

 Supplemental Data

 Group

 Authenticator

 End of Survey



 Reference survey

 Table of Contents

 Set Embedded Data:

group

Value will be set from Panel or URL.

[Set a Value Now](#)

[See Distribution](#)

[Add a New Field](#)

[Add Below](#)

[Move](#)

[Duplicate](#)

[Add From Contacts](#)

[Options](#)

[Delete](#)

 Then Branch If:

Question ▾

status What is your status? ▾

Faculty ▾

Is Selected ▾

[See Logic - Skipping](#)

⊖ ⊕

✓ OK

 Add a New Element Here

 Randomizer

Randomly present  0  of the following elements ☐ Evenly Present Elements

[See Logic - Randomization](#)


[Add Below](#)

[Move](#)

[Duplicate](#)

[Collapse](#)

[Delete](#)

 Add a New Element Here

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

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

Answers & Questions


Answers within a Question = **Choice** Randomization

Questions within a Block = **Question** Randomization

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

Edit block

▼ Block behavior

 Question randomization

 Loop & merge

Question Randomization

- ☒ No Randomization
- ☐ Randomize the order of all questions
- ☐ Present only of total questions
- ☐ Advanced Randomization [Set Up Advanced Randomization](#)

Note: Enabling Question Randomization per page, skip logic and override question

Choice Randomization


- ☒ No Randomization
- ☐ Randomize the order of all choices
- ☐ Present only of total choices
- ☐ Advanced Randomization [Set Up Advanced Randomization](#)

▼ Question behavior

 Display logic

 Skip logic

 Carry forward choices

 Choice randomization

 Recode values

☒ Default choices

 JavaScript

<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

The image shows a screenshot of a software interface for configuring question randomization. A red arrow points from the 'Question Randomization' panel to the 'Advanced Randomization' panel. Another red arrow points from the 'Set Up Advanced Randomization' link to the 'Advanced Randomization' panel. A red box highlights the 'Set Up Advanced Randomization' link. The 'Advanced Randomization' panel shows a list of questions with up and down arrows for reordering. The 'Randomize Questions' section has a green box labeled 'Random Order'. The 'Random Subset' section has a blue box labeled 'Random Display'. The 'Undisplayed Items' section has a red box. The 'Questions per Page' section has a text input field.

Edit block

▼ **Block behavior**

- Question randomization
- Loop & merge

Question Randomization

- ☒ No Randomization
- ☐ Randomize the order of all questions
- ☐ Present only of total questions
- ☐ Advanced Randomization [Set Up Advanced Randomization](#)

Note: Enabling Question Randomization will ignore page breaks, questions per page, skip logic and override question order.

Advanced Randomization

Fixed Display Order
Display the questions in the order they appear below:

- Thank you for coming to a library workshop. We
- What is your status?
- Please rate the instructor on the following quality
- What department are you in?

Randomize Questions
Randomize and insert all items from the list below:

Random Order

Random Subset
Randomly insert questions from the list below:

Random Display

☐ Evenly Present Elements

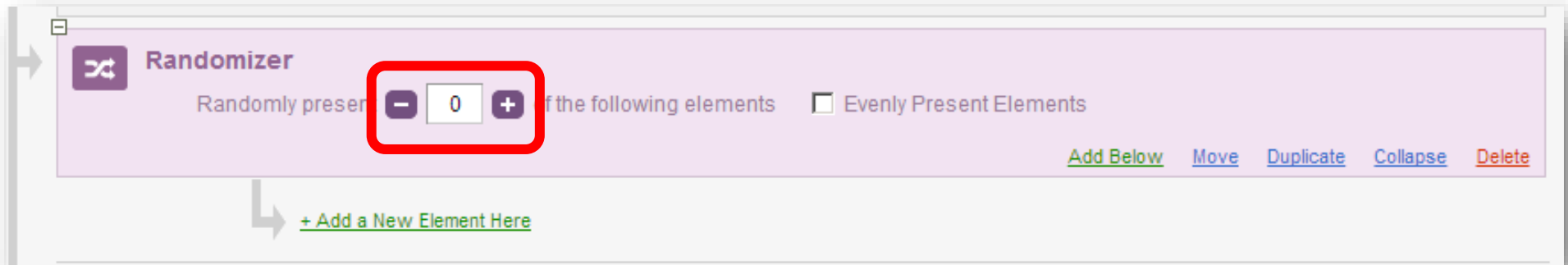
Undisplayed Items
Do not display the questions below:

Questions per Page
Show questions on each page.

Close ☒ Save

Survey Flow Randomizer

Blocks within a survey

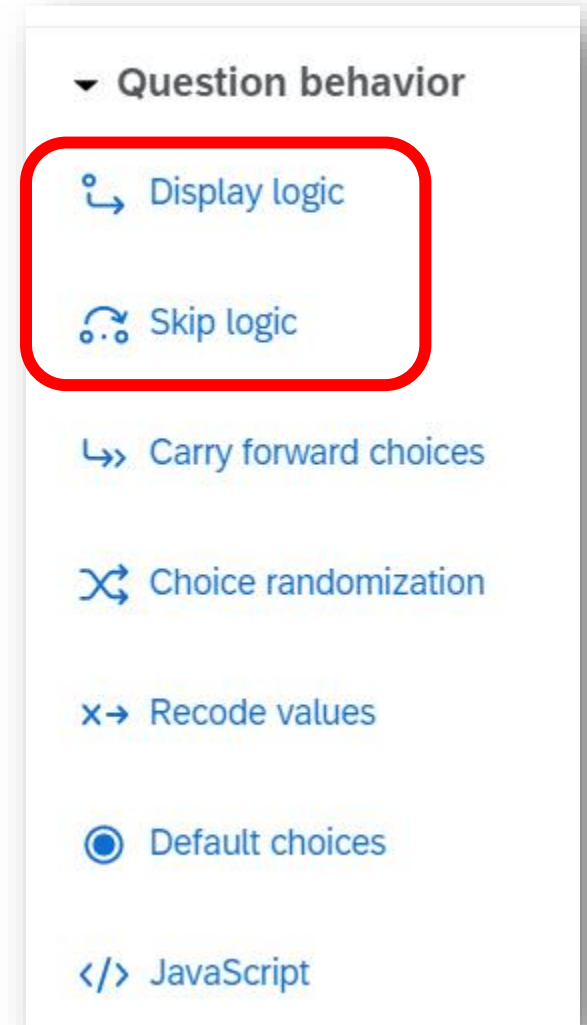


Randomly Order: Put all the blocks involved inside the randomizer, and set the number of blocks to present ***equal*** to the total number of blocks.

Randomly Display: Put all the blocks to choose from inside 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.

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.

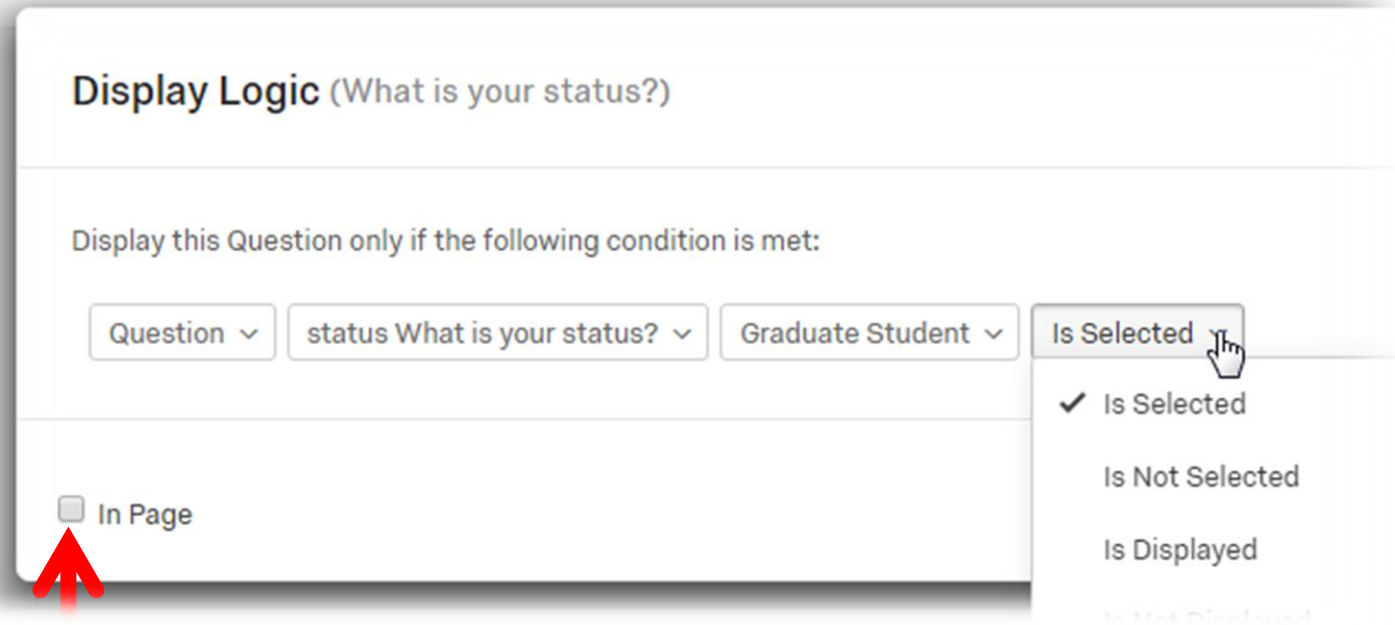
The same outcome can be achieved using different kinds of logic.

Display Logic

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

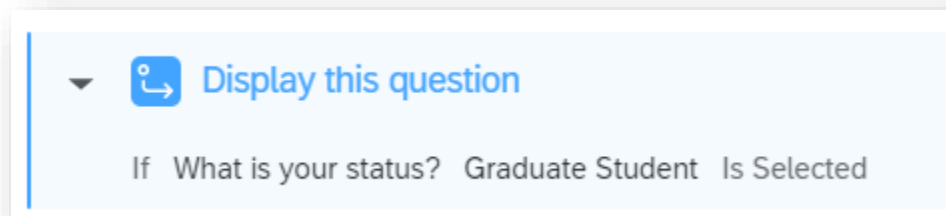
It works for:

- questions
- response choices
- matrix rows



The screenshot shows the 'Display Logic' configuration window for a question titled 'What is your status?'. The window has a title bar 'Display Logic (What is your status?)'. Below the title bar, it says 'Display this Question only if the following condition is met:'. There are three dropdown menus: 'Question' (selected), 'status What is your status?' (selected), and 'Graduate Student' (selected). To the right of these is a dropdown menu with 'Is Selected' selected. A red arrow points to the 'In Page' checkbox, which is currently unchecked. The dropdown menu for 'Is Selected' is open, showing options: 'Is Selected' (checked), 'Is Not Selected', 'Is Displayed', and 'Is Not Displayed'.

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.

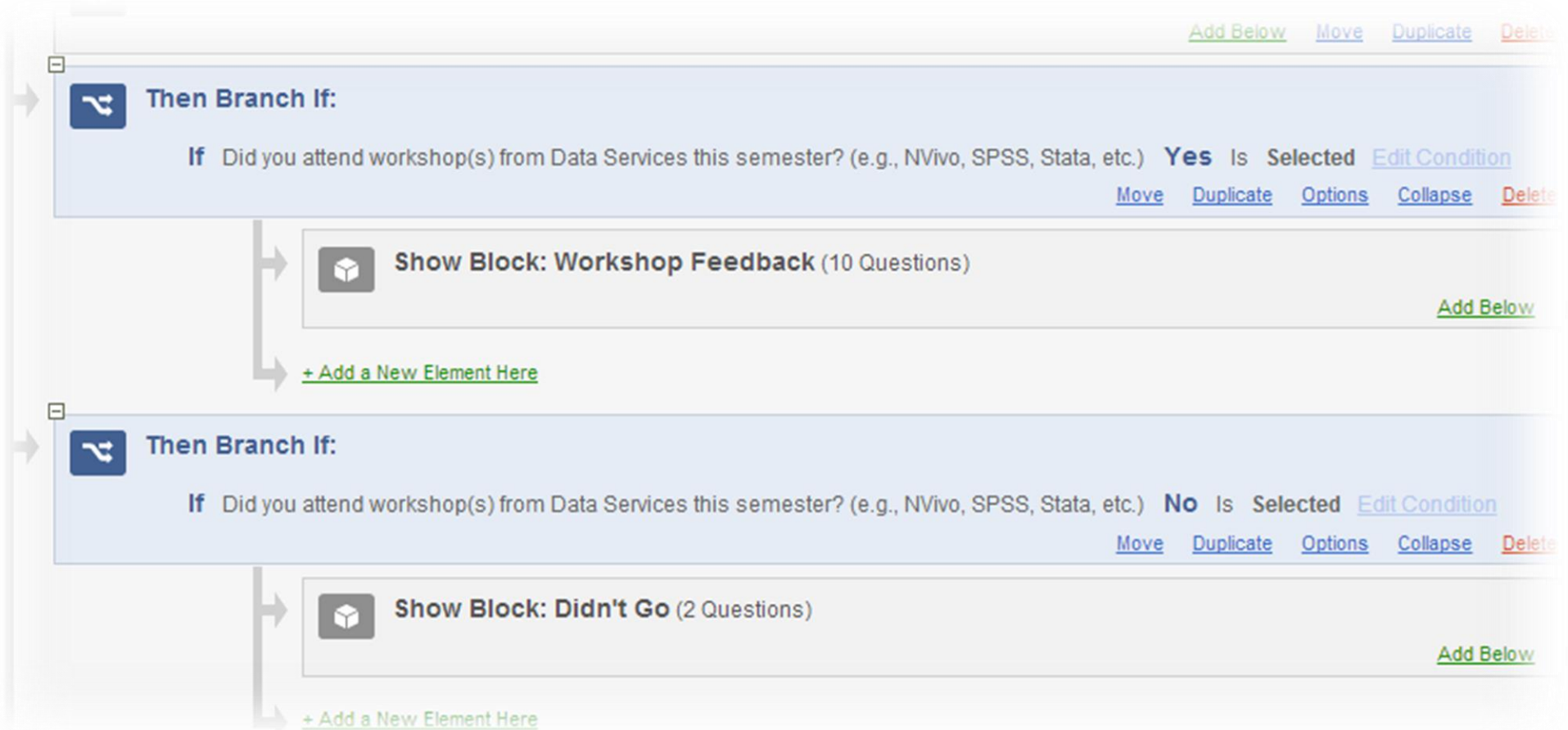


The screenshot shows a specific condition in the Display Logic configuration. It says 'Display this question' with a blue icon. Below it, it says 'If What is your status? Graduate Student Is Selected'.

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.



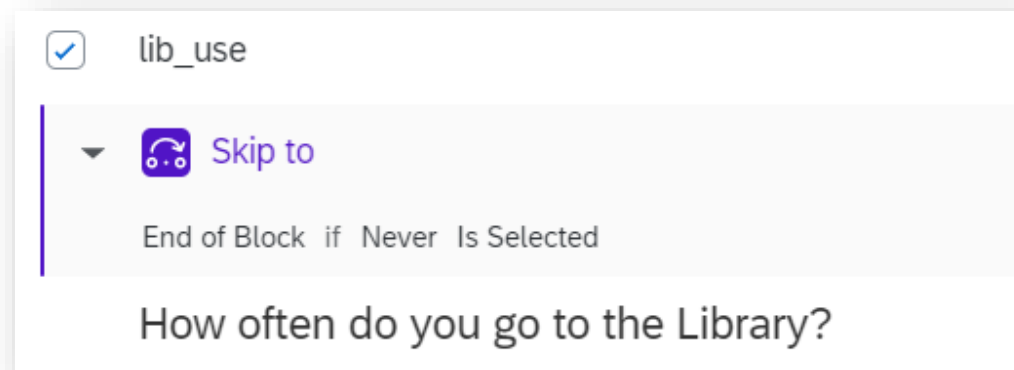
Skip Logic

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.



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.

The screenshot displays a survey interface with two questions. The first question, titled 'services_used', asks 'Which of the following library services have you used?' and lists three options: 'information desk', 'workshop', and 'individual consultation', each with an unchecked checkbox. The second question, titled 'services_rating', asks 'How useful was each library service?'. It features a dropdown menu with a green arrow icon and the text 'Carry forward statements'. Below this, it says 'from Which of the following library services have yo... that are Selected Choices'. The question then presents a table with three columns: 'Not at all useful', 'Slightly useful', and 'Moderately useful'. The table lists the same three services as the first question. A red circle highlights the 'information desk' row in the table, indicating that only the selected services from the first question will appear in this follow-up question.

	Not at all useful	Slightly useful	Moderately useful
information desk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
individual consultation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

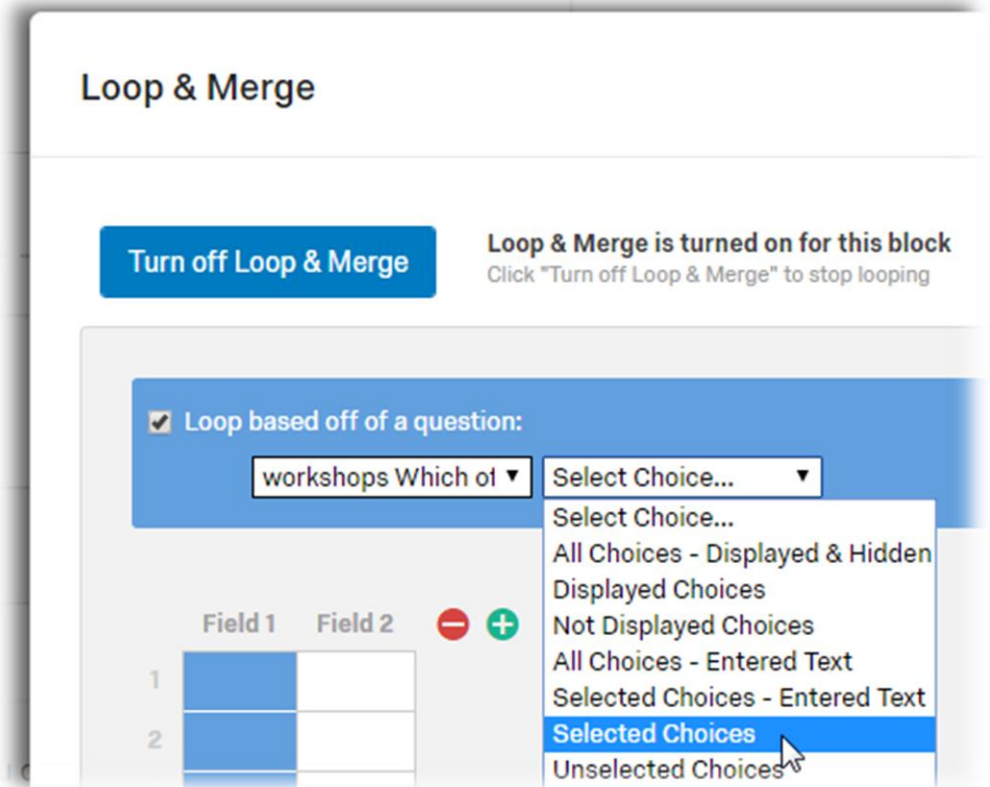
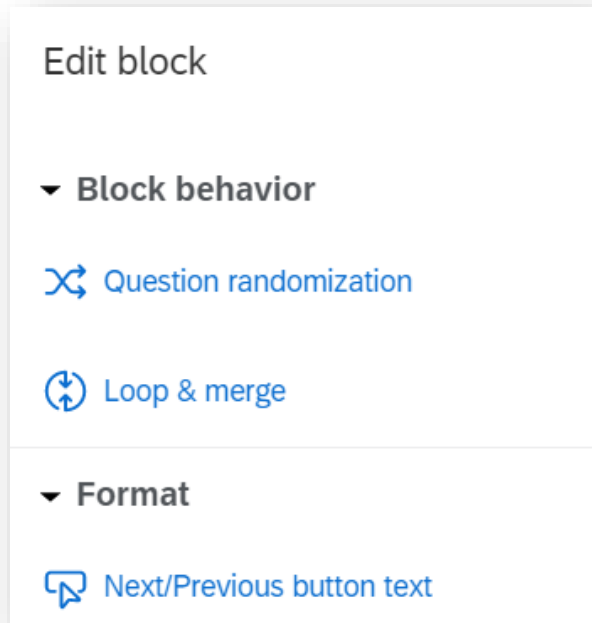
This avoids duplicating questions to see a surveys structure clearly and more easily make changes.

Example:

- 1 a. Have you heard of it?
b. Are you interested?
c. What would you pay?
- Ask about each one

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



Loop & Merge – Piped Text

The screenshot shows the Qualtrics survey editor interface. At the top, a blue header bar contains a checkbox labeled "Loop based off of a question:" which is checked. Below it, there are two dropdown menus: "workshops Which of" and "Selected Choices".

Below the header, there is a table with three columns: "Field 1", "Field 2", and "Field 3". The table contains eight rows of data:

	Field 1	Field 2	Field 3
1	Surviving SPSS / SPSS I	SPSS	SPSS1
2	SPSS for Theses & Dissertations / SPSS II	SPSS	SPSS2
3	Surviving Stata / Stata 1	Stata	Stata1
4	Stata for Theses & Dissertations / Stata 2		
5	Surviving R / Intro to R		
6	Intro to Qualitative Computing & NVivo		
7	Intro to NVivo		
8	Intermediate NVivo		

To the right of the table, there is a "Piped Text..." menu. The menu is open, showing a list of options: "Survey Question", "Embedded Data Field", "GeolP Location", "Survey Links", "Date / Time", "Opt Out Link", "Random Number", "Panels Field", "Loop & Merge", and "Quota". The "Loop & Merge" option is highlighted with a mouse cursor.

Below the table, there is a section titled "Workshop Feedback". It contains a text input field with the following text: "The \${lm://Field/1} Workshop". Below this, there is another text input field with the following text: "The following questions are about the \${lm://Field/1} workshop.".

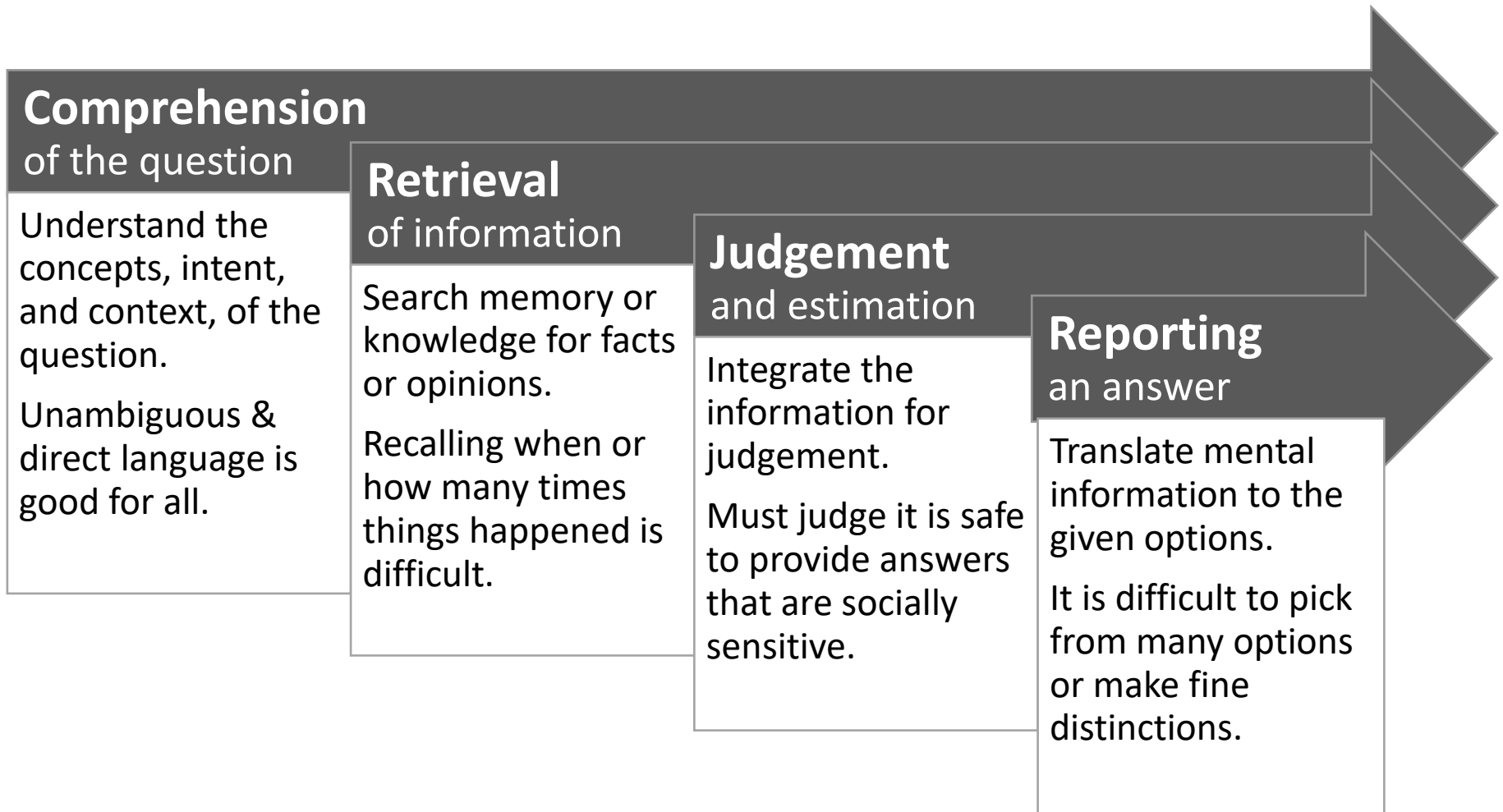
You can specify different text for each possible loop and then add it to your survey using “Piped Text”.

as your proficiency with \${lm://Field/2} before the workshop?

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.



Questions vary on...

Difficulty

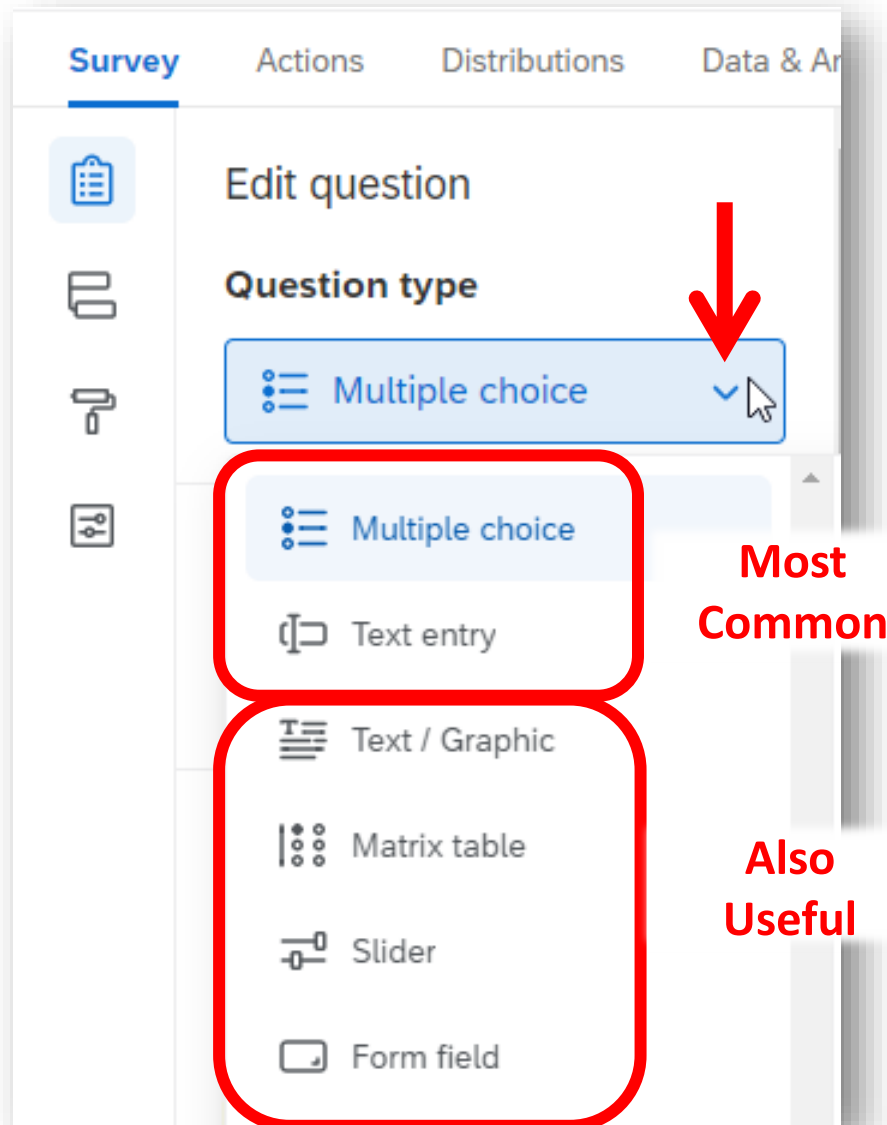
- **Easy** – Clear, one-topic question using simple words and grammar in which the respondent immediately recognizes the appropriate answer
 - **Impossible** - A question that either doesn't apply to the respondent, or doesn't have an appropriate answer choice. May prompt them to leave.
- **Note:** A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

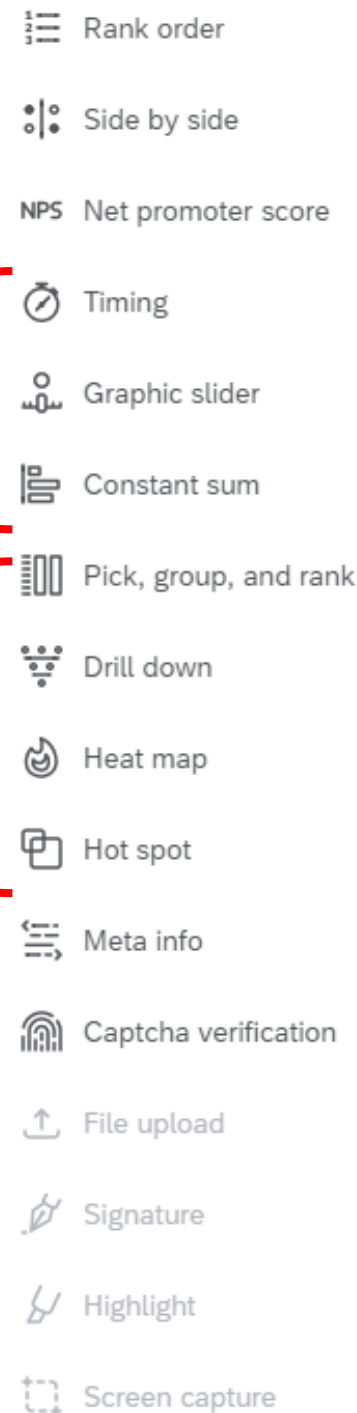
Question Types

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



Use if
needed

Specialty



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

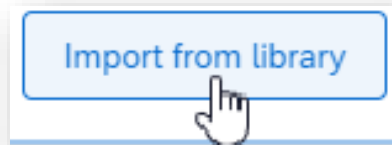
Click and drag on the bottom right corner of the field to **adjust the length** of each field to match the expected answers. This helps participants understand what you expect.

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.

Preview Question

Enter a date:

January 2019						
Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

01-01-2019

< Select a result

Q date

Calendar & Date Questions
Survey found in Qualtrics Library - Survey Library - Demographics

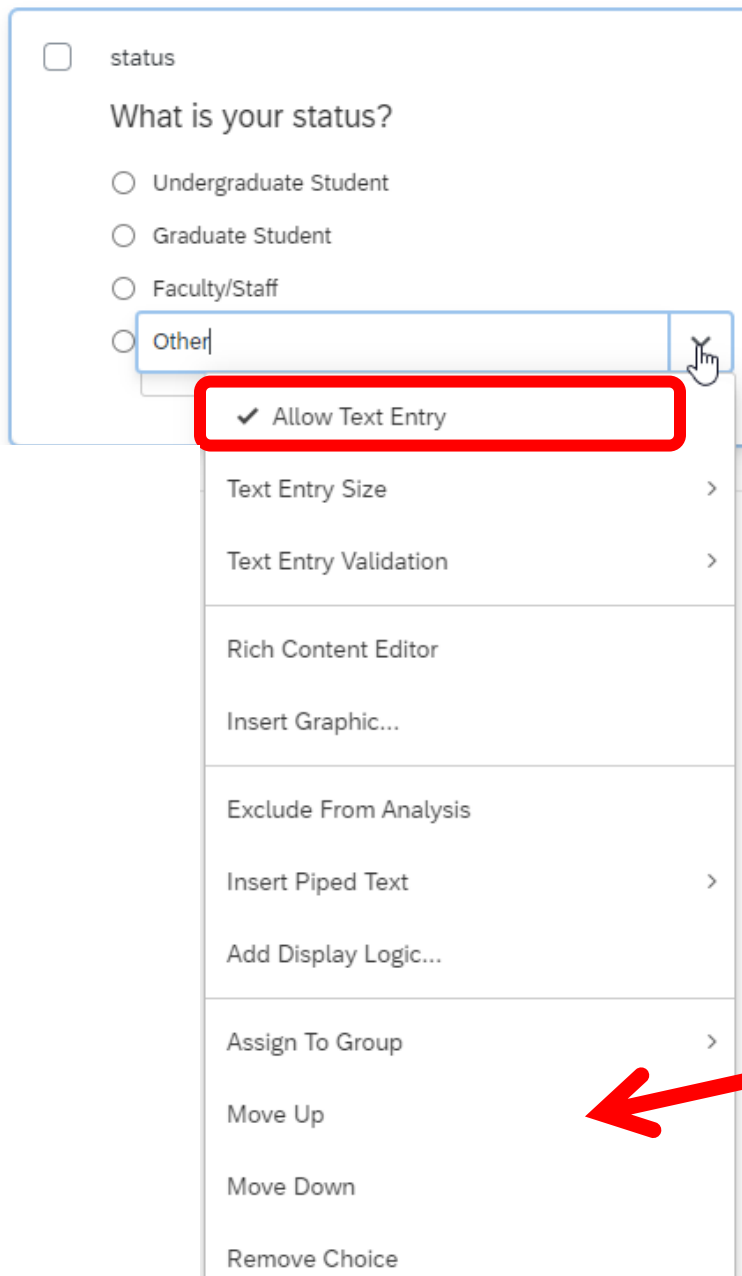
Calendar Questions

- What is (or will be) the date?
- Enter a date:
- Select a Date: (Note, this question is ...

Preview Area

Enter a date:

Multiple Choice



The screenshot shows a survey question editor interface. At the top, there is a checkbox labeled 'status' and the question text 'What is your status?'. Below this, there are four radio button options: 'Undergraduate Student', 'Graduate Student', 'Faculty/Staff', and 'Other'. The 'Other' option is selected, and a text entry field is visible next to it. A red rectangle highlights the 'Allow Text Entry' option in the menu. Below the menu, there are several other options: 'Text Entry Size', 'Text Entry Validation', 'Rich Content Editor', 'Insert Graphic...', 'Exclude From Analysis', 'Insert Piped Text', 'Add Display Logic...', 'Assign To Group', 'Move Up', 'Move Down', and 'Remove Choice'. A red arrow points from the text 'You can also use the menu to re-order or remove answer choices or group them.' to the 'Move Up', 'Move Down', and 'Remove Choice' options.

☐ status

What is your status?

☐ Undergraduate Student

☐ Graduate Student

☐ Faculty/Staff

☐ Other

✓ Allow Text Entry

Text Entry Size >

Text Entry Validation >

Rich Content Editor

Insert Graphic...

Exclude From Analysis

Insert Piped Text >

Add Display Logic...

Assign To Group >

Move Up

Move Down

Remove 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.

Multiple Response

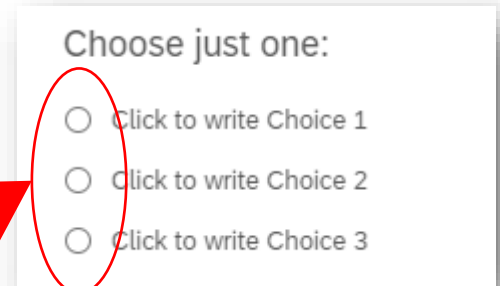
The Multiple Choice type encompasses both single and multiple response/answer questions.

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.

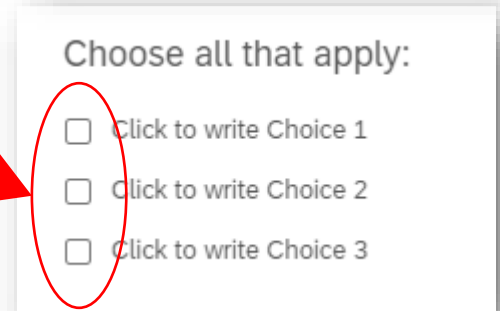
It is always a good idea to remind people when it is a multiple answer question (e.g., “*Choose all that apply*”)



Choose just one:

- ☐ Click to write Choice 1
- ☐ Click to write Choice 2
- ☐ Click to write Choice 3

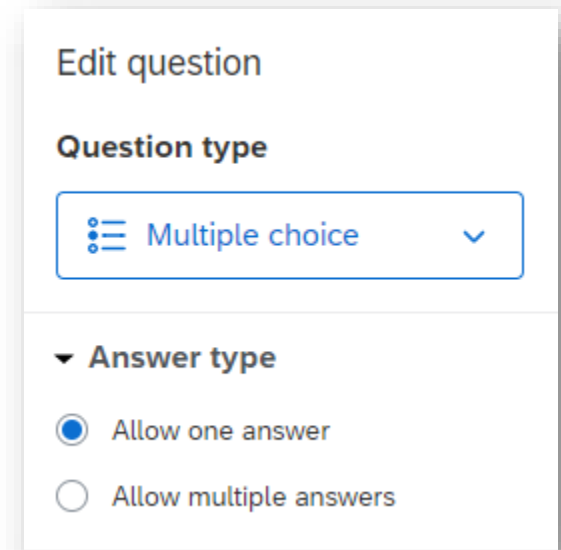
A red circle highlights the radio buttons, and a red arrow points from the text 'Round radio buttons are for single answer questions.' to this circle.



Choose all that apply:



- ☐ Click to write Choice 1
- ☐ Click to write Choice 2
- ☐ Click to write Choice 3

A red circle highlights the checkboxes, and a red arrow points from the text 'Square checkboxes are for multiple answer questions.' to this circle.



Edit question

Question type

 Multiple choice 

▼ Answer type

- ☒ Allow one answer
- ☐ Allow multiple answers

The 'Multiple choice' option is selected in the 'Question type' dropdown, and the 'Allow one answer' option is selected in the 'Answer type' section.

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.

satisfaction

Are you satisfied with the following aspects of the library?

	Very satisfied	Somewhat satisfied	Neutral	Somewhat dissatisfied	dis
Study Areas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Research Assistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Availability of Materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Statements

Scale Points

Edit question

Question type

Matrix table

Matrix type

Likert

Answer type

Allow one answer

Statements

Number of statements

3

Edit multiple

Use suggested statements

Scale points

Number of scale points

5

Edit multiple

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.

▼ Library Spaces

intro_spaces

In the next set of questions, you will be asked about your perception of the library **spaces**.

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

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.



fruit

During the past **3 months**, how much fruit did you eat in a **typical day**?

No Fruit Some Fruit Lots of Fruit

0 0.5 1 1.5 2 2.5 3 3.5 4 4.5 5 5.5 6

cups of fruit

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

▼ Scale points

Minimum Maximum

0 6

Number of decimals

— 1 +

Grid lines ☒

— 12 +

☒ Snap to grid lines

Add "not applicable" option ☐

▼ Format

Add labels ☒

— 3 +

Edit multiple

Use suggested labels ☐

Center labels ☐

Show value ☒

Mobile friendly ☒

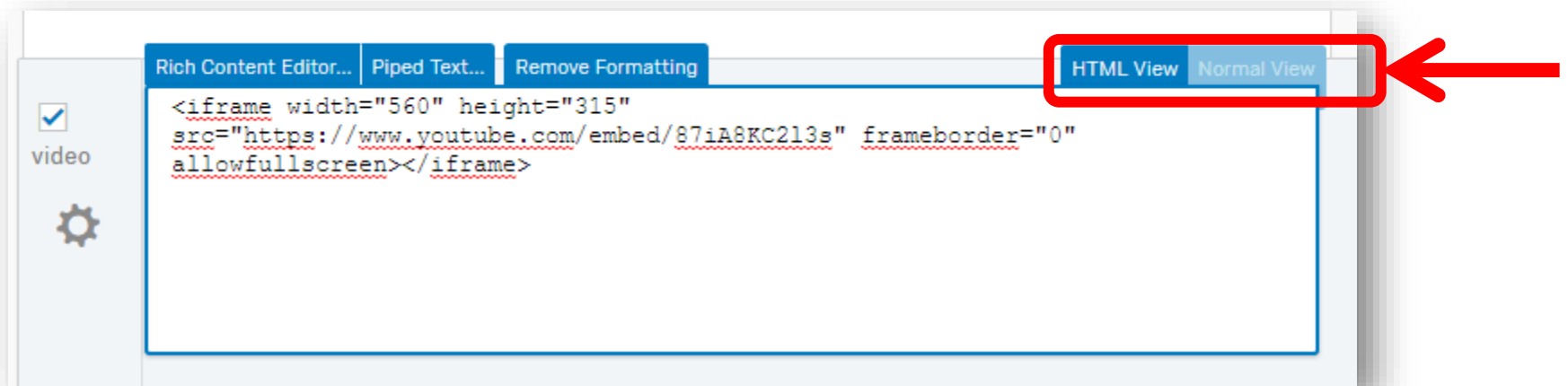
Media: Video & Embedded Content

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 lose some of your modifications.

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



Hidden Questions

- Browser Type
- Browser Version
- Operating System
- Screen Resolution
- Flash Version
- Java Support
- User Agent

Meta info

timing

Timing

This question lets you record and manage how long a participant spends on this page. This question the participant.



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

Edit question

Question type



Timing



▼ Timer settings

Delay showing submit button



Display "submit" after (seconds)

—

1

+

Auto advance



Show timer



Timer direction



Count up



Count down

Seconds to count

—

0

+

<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.

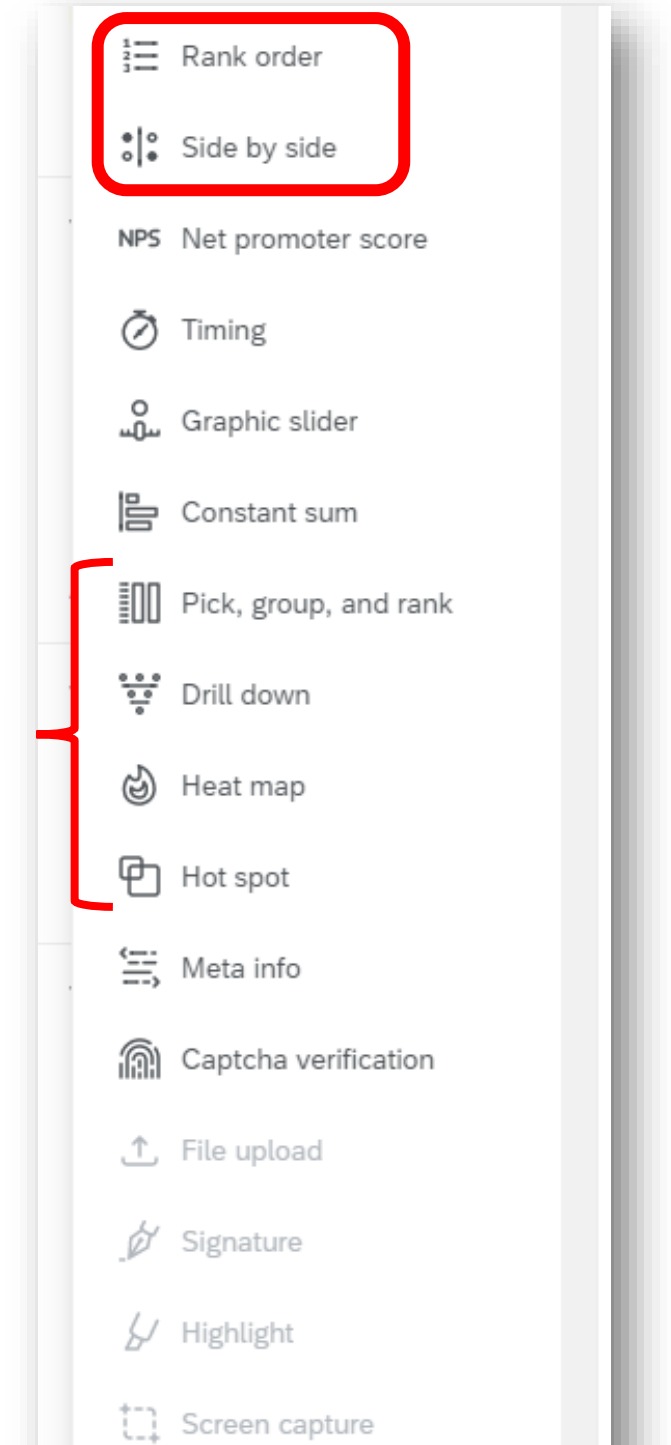
Side by Side

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.

Specialty



Thinking ahead to Data Analysis

Qualtrics Analysis Tools

Content Analysis

“Tag” or code each text response.

1. Choose a Question

2. Add codes

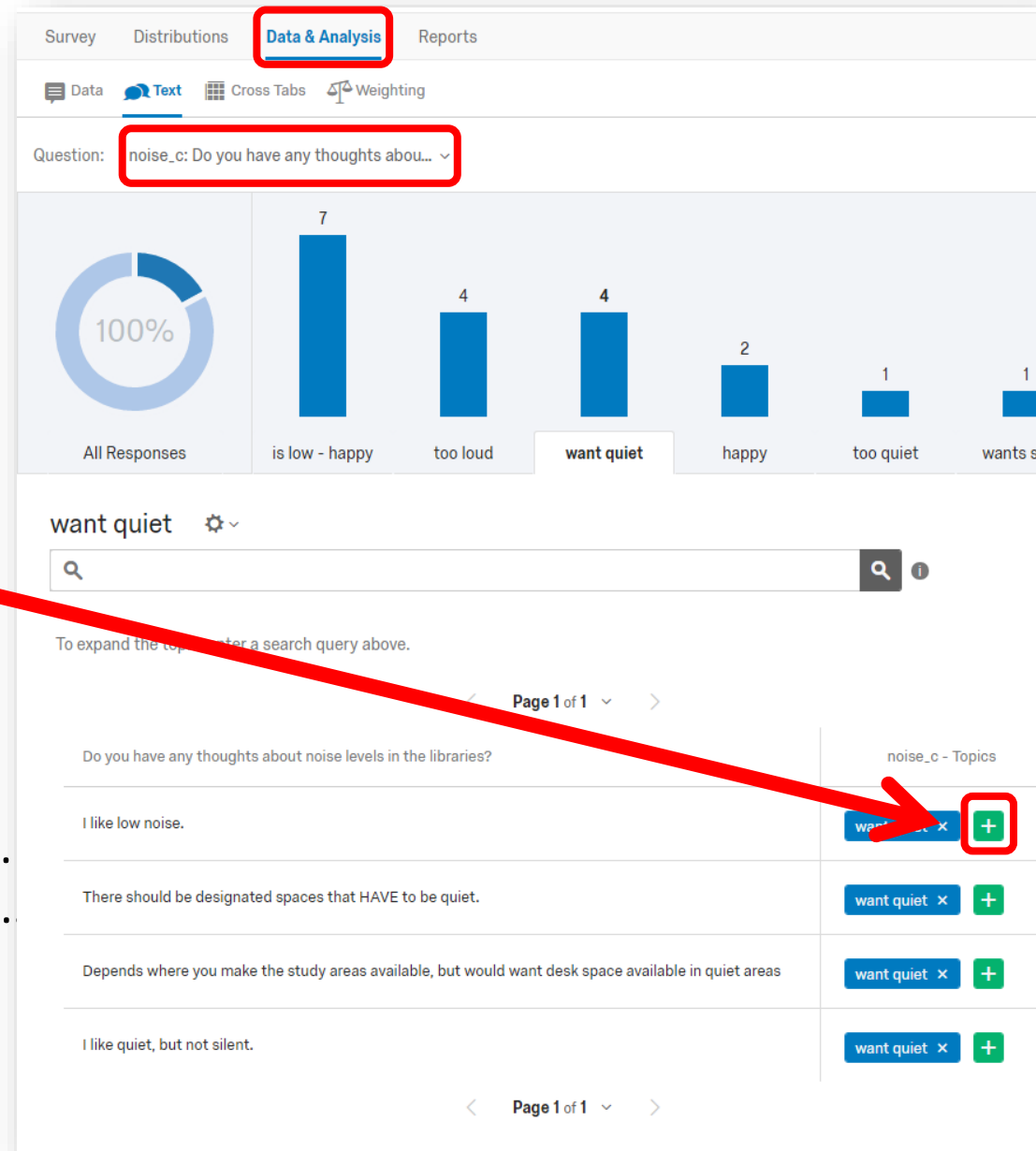
Click the “+” to add a new code.

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.



Crosstabulation

Survey Actions Distributions **Data & Analysis** Reports

Data Text iQ **Crosstabs** Weighting

New Crosstab ▾ Add Filter ▾

Variables Select All

Search Variables...

Columns (Banner)

know: Bef...is topic? ✕

Rows (Stubs)

learn:...kshop? ✕ ⚙

Cells

☒ Total Count
☐ Missing Count
☐ Counts
☒ Column Percentages (Answering)
☐ Column Stat Tests (Answering)
☐ Column Percentages (All)
☐ Column Stat Tests (All)
☐ Overall Stat Test of Percentages
☐ Bucketed Counts
☐ Bucketed Percentages (Answering)

Stub: learn: How much do you think you learned at the workshop?

	know: Before the workshop, how much did you think you knew about this topic?				
	Total	Nothing	A little	Some	A lot
Total Count (Answering)	30.0	10.0	11.0	5.0	4.0
Nothing	0.0%	0.0%	0.0%	0.0%	0.0%
A little	13.3%	0.0%	9.1%	40.0%	25.0%
Some	40.0%	40.0%	54.5%	20.0%	25.0%
A lot	46.7%	60.0%	36.4%	40.0%	50.0%

Calculates column percentages.

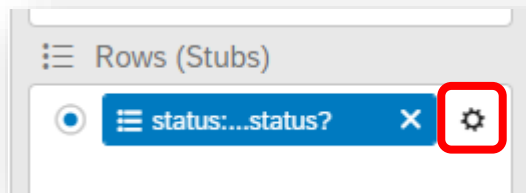
Put in **Column:** Independent, Treatment, or Grouping variable.

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

Crosstabs - Bucketing

You can merge categories in Rows to better see relationships.

Click the **Gear** icon:

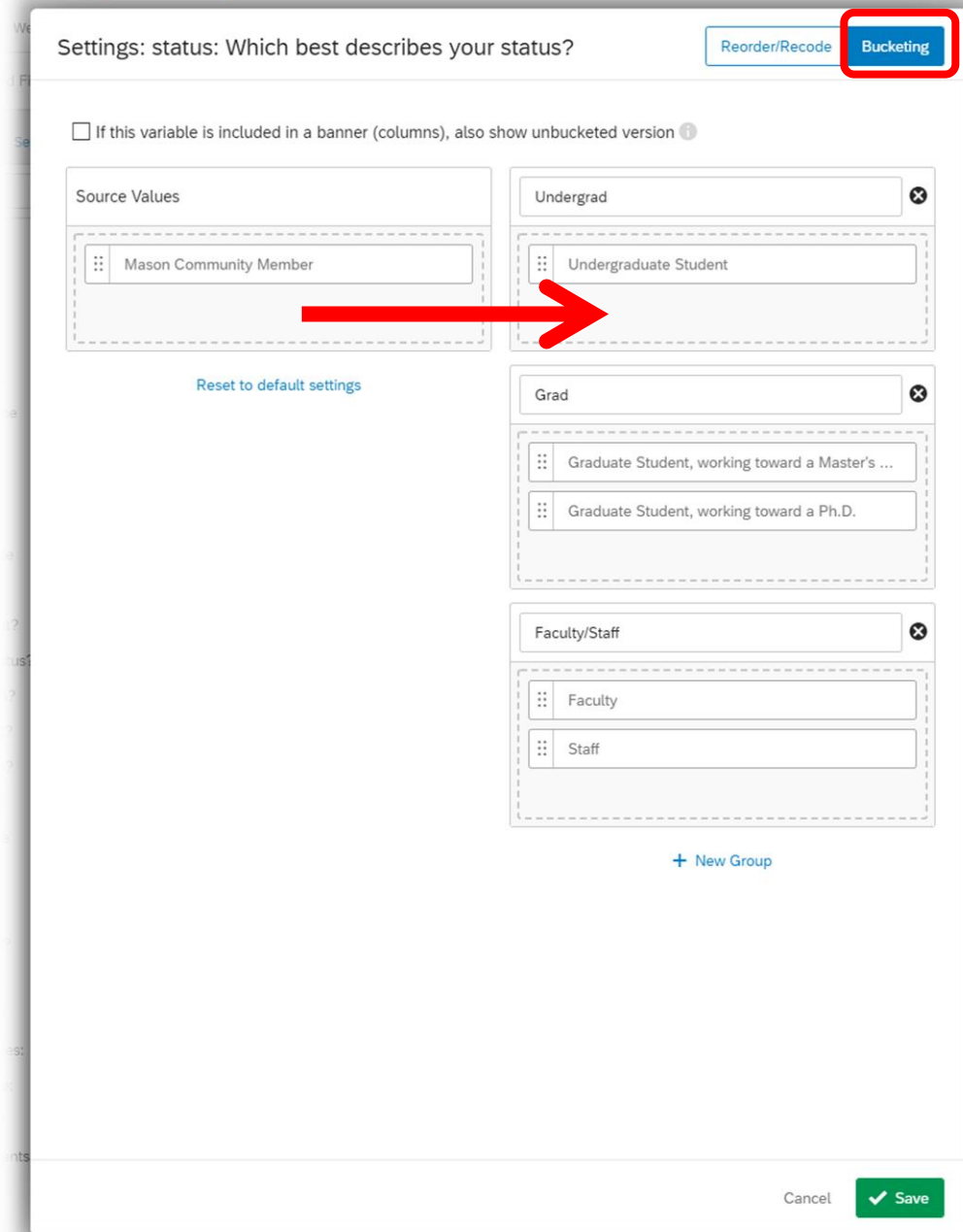


Choose **Bucketing** at the top right

Drag variables to group boxes

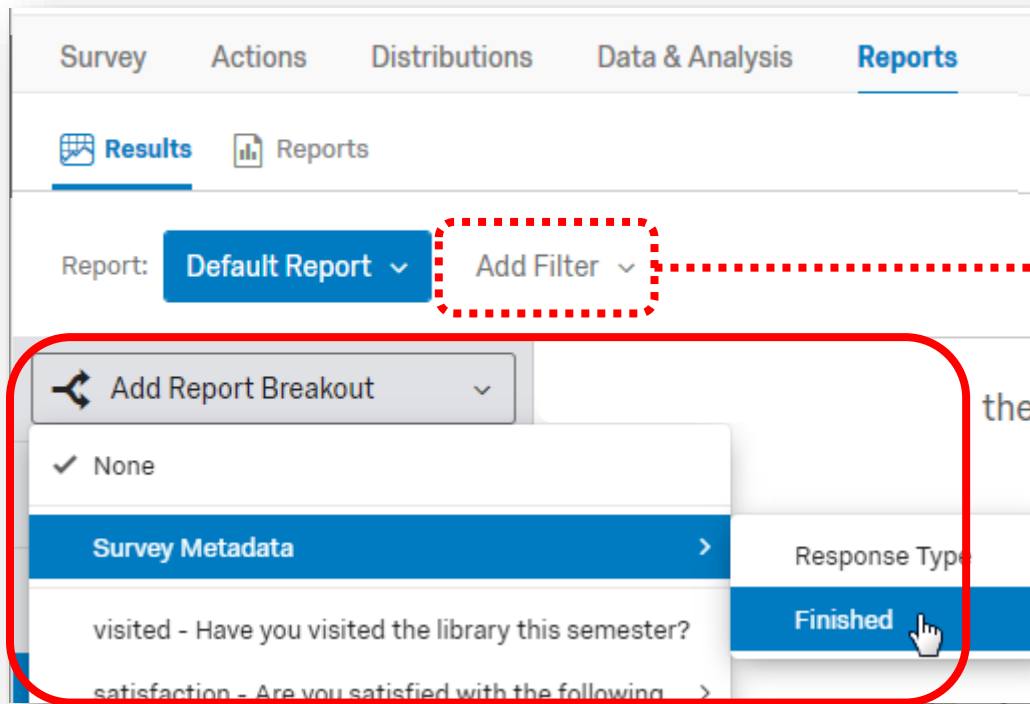
Label groups

Click **Save**

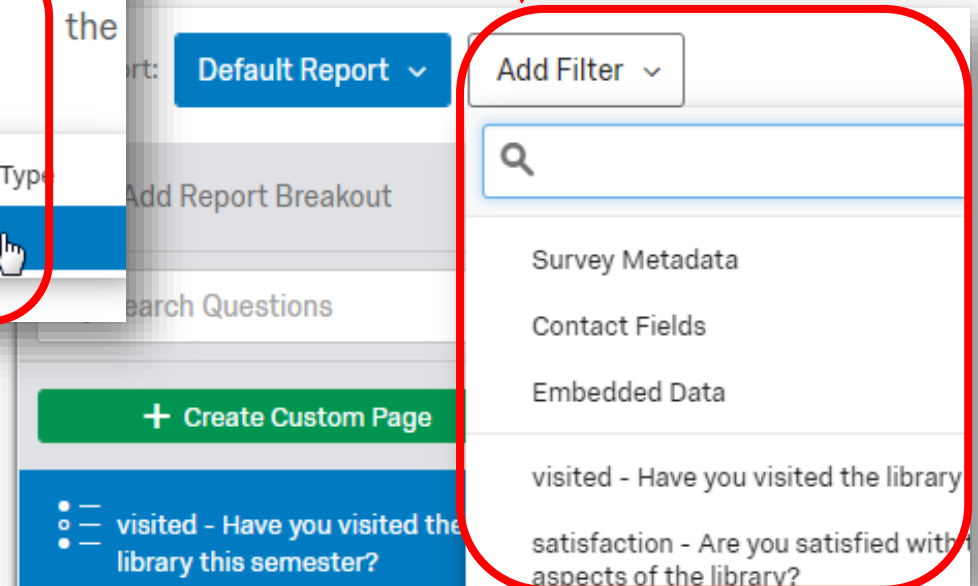
A screenshot of the 'Settings: status: Which best describes your status?' dialog box. The 'Bucketing' tab is selected and highlighted with a red box. The dialog shows a 'Source Values' section on the left with a list of values, including 'Mason Community Member'. On the right, there are several group boxes for organizing these values. The first group is labeled 'Undergrad' and contains 'Undergraduate Student'. The second group is labeled 'Grad' and contains 'Graduate Student, working toward a Master's ...' and 'Graduate Student, working toward a Ph.D.'. The third group is labeled 'Faculty/Staff' and contains 'Faculty' and 'Staff'. A red arrow points from the 'Mason Community Member' value in the source list to the 'Undergraduate Student' value in the 'Undergrad' group box. At the bottom right, there are 'Cancel' and 'Save' buttons.

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.



Exporting

Exporting Data

The screenshot shows the Qualtrics interface for a project named "My Sample Project". The "Data & Analysis" tab is selected and highlighted with a red box. Below it, the "Data" sub-tab is active. The interface displays a table of recorded responses. A dropdown menu is open from the "Export & Import" button, with the "Export Data..." option highlighted by a red box and a hand cursor. The table contains columns for selection, recorded date, question text, response, and actions.

XM My Sample Project

Survey Actions Distributions **Data & Analysis** Reports

Data Text iQ Crosstabs Weighting

Add Filter

Recorded Responses **30** (60)
Responses in Progress **0**

With Selected Page 1 of 2 Export & Import Edit Tools

Export Data...

- Import Data...
- Response Export Automation...
- Response Import Automation...
- Manage Previous Downloads...
- View Automation History...

	Recorded Date	lib_use - How often do you go to the Library?	services_	services	Actions
<input type="checkbox"/>	Jul 2, 2021 10:35 AM	Rarely			
<input type="checkbox"/>	Jul 2, 2021 10:35 AM	Sometimes			
<input type="checkbox"/>	Jul 2, 2021 10:35 AM	Sometimes		workshop	

Question Number *aka* Export Tag *aka* Variable Name

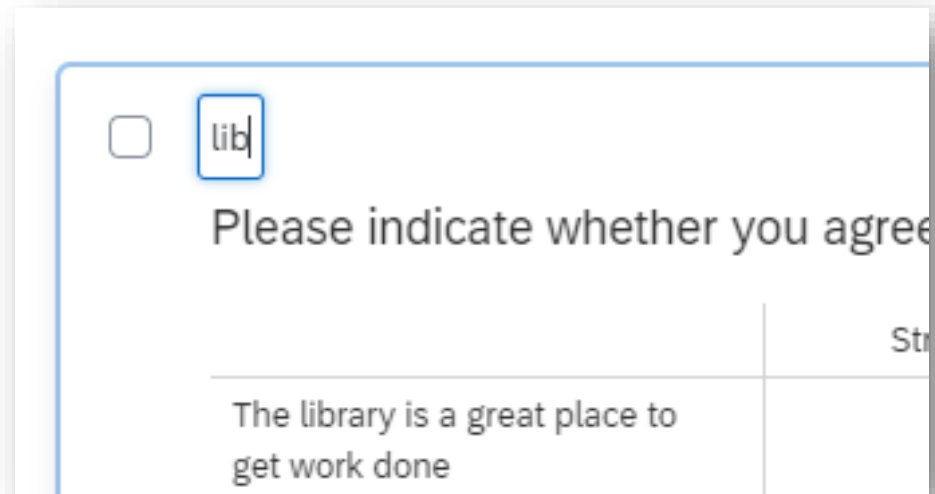
The word that appears in the upper left of each question is the “Export Tag”, which serves the same function as a variable name.

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.



The screenshot shows a survey question interface. In the top left corner, there is a small square box containing the text 'lib'. To the right of this box, the text 'Please indicate whether you agree' is visible. Below this, a horizontal line separates the question text from the response options. The question text reads 'The library is a great place to get work done'. To the right of the question text, the word 'Strongly' is partially visible, indicating a Likert scale response format.

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

Rich Content Editor... Piped Text... HTML View Normal View

Are you satisfied with the following aspects of the library?

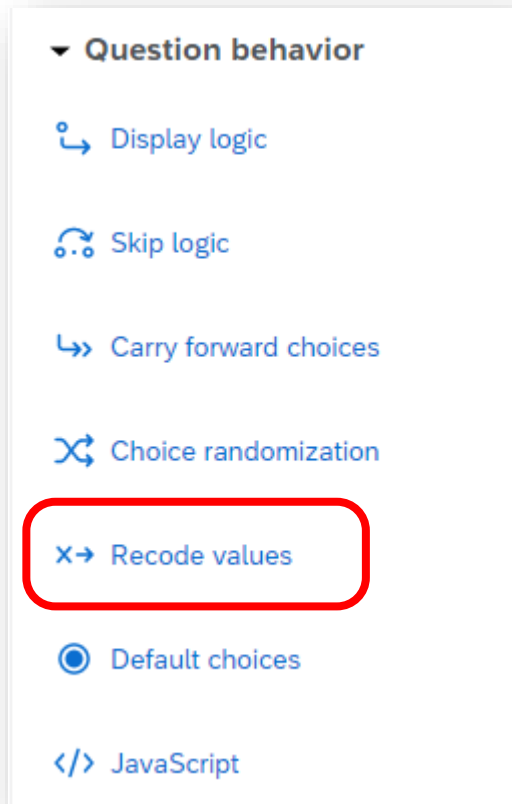
Edit Question Label: ? Reset Label

	Very satisfied	satisfied	Neutral	dissatisfied	dissatisfied
Study Areas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research Assistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of Materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Recode Values

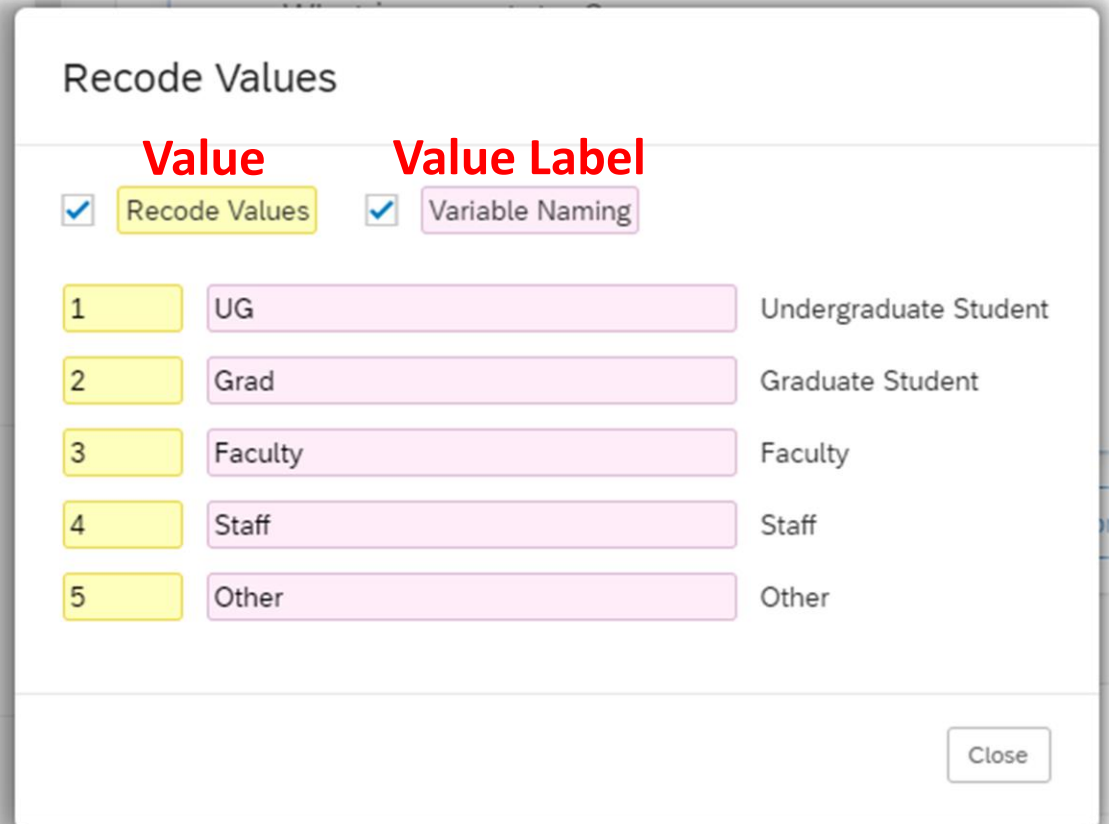
If you plan to use statistical software, you may wish to change the numeric values assigned to each answer choice. Although you can use this to reverse code, consider whether it could be confusing later.

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



A screenshot of the 'Question behavior' menu. The menu is a vertical list of options: 'Display logic', 'Skip logic', 'Carry forward choices', 'Choice randomization', 'Recode values', 'Default choices', and 'JavaScript'. The 'Recode values' option is highlighted with a red rounded rectangle.

- ▼ Question behavior
 - Display logic
 - Skip logic
 - Carry forward choices
 - Choice randomization
 - X→ Recode values**
 - Default choices
 - JavaScript



A screenshot of the 'Recode Values' dialog box. It has two checked checkboxes at the top: 'Recode Values' and 'Variable Naming'. Below these are five rows, each with a numeric value in a yellow box, a text input field for the value label, and the original label. The labels are 'Undergraduate Student', 'Graduate Student', 'Faculty', 'Staff', and 'Other'. A 'Close' button is at the bottom right.

Value	Value Label	Original Label
1	UG	Undergraduate Student
2	Grad	Graduate Student
3	Faculty	Faculty
4	Staff	Staff
5	Other	Other

Matrix Question Recode Values

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

Recode Values

☒ Recode Values ☒ Variable Naming ☒ Question Export Tags

1 2 3

Very satisfied Very satisfied

satisfied_1
Study Areas

satisfied_2
Research Assistance

satisfied_3
Availability of Materials

Value Value Label Variable Name

☒ Recode Values ☒ Variable Naming ☒ Question Export Tags

2 1 0

Very satisfied Somewhat satisfied Neutral

Very satisfied Somewhat satisfied Neutral

sat_study
Study Areas

sat_assist
Research Assistance

sat_avail
Availability of Materials

ex. Change the coding to have neutral be 0

ex. Make more descriptive variable names

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**

	q7a	q7b	q7c	q7d
id	math	english	history	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)
```

Using Excel

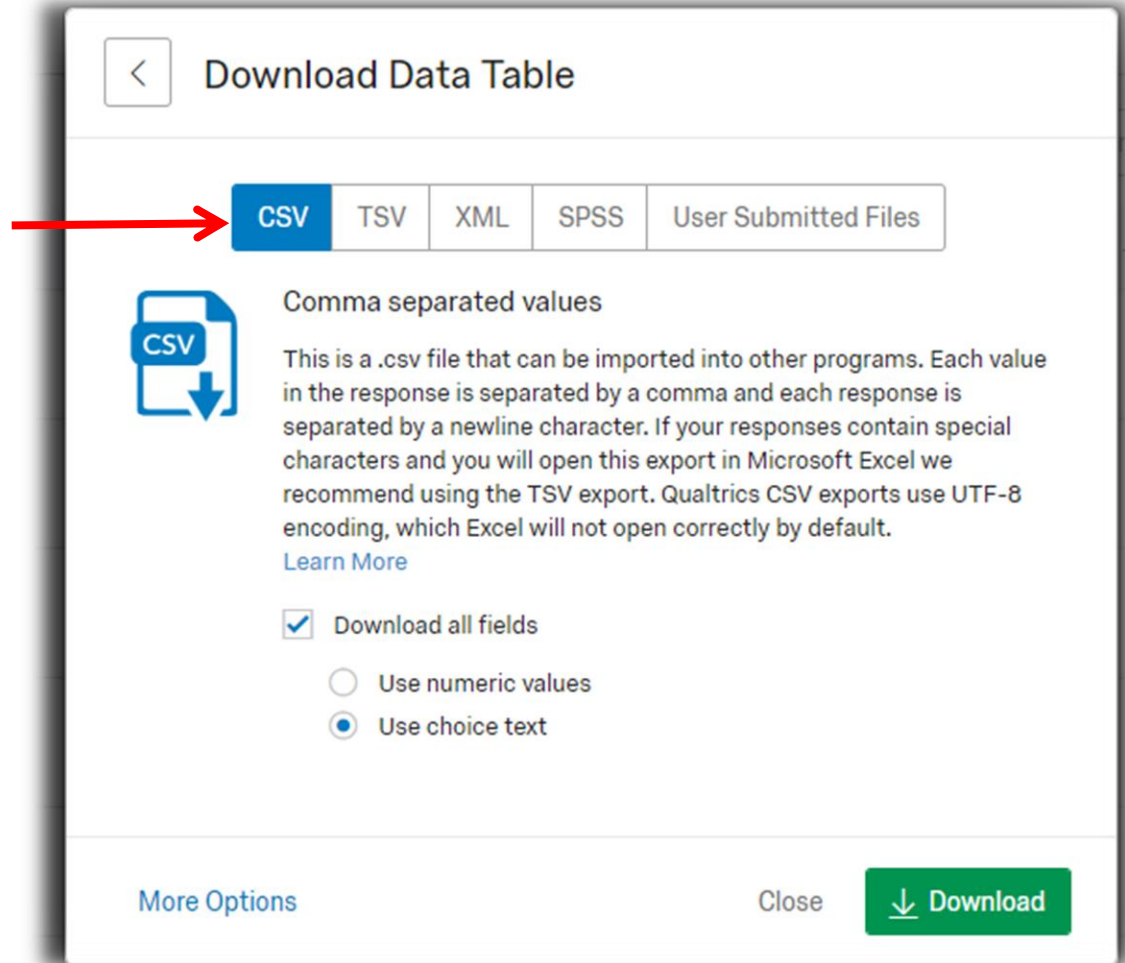
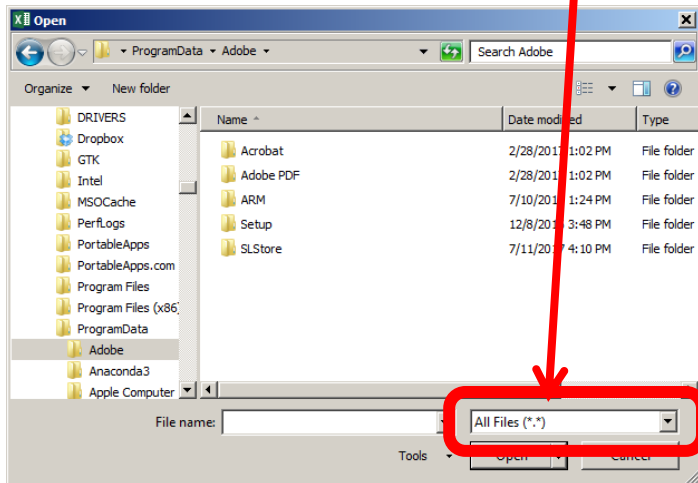
For Excel

CSV = **C**omma Separated Values

TSV = **T**ab 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.

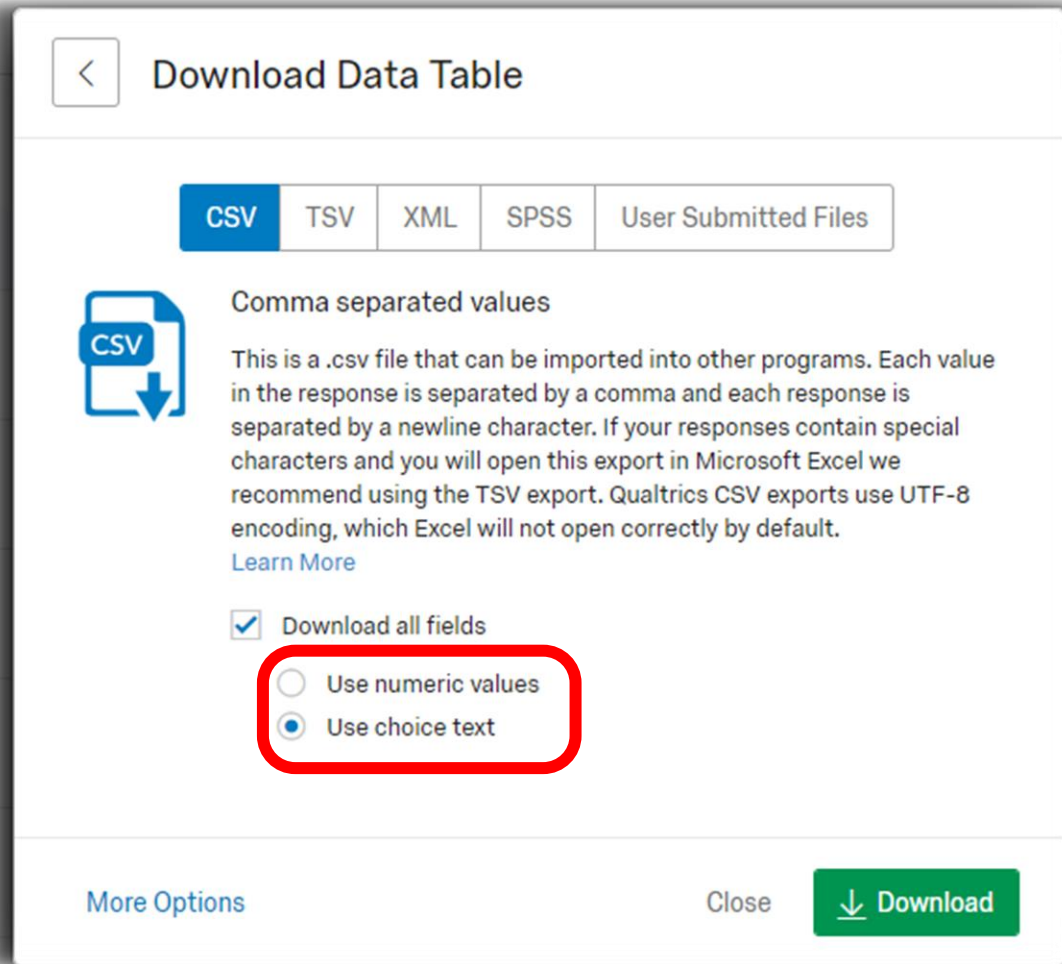
If you *do* have special characters, use **TSV**. You may need to choose File → Open in Excel and change the dialog box to show **All Files**.



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.



< Download Data Table

CSV TSV XML SPSS User Submitted Files

 Comma separated values

This is a .csv file that can be imported into other programs. Each value in the response is separated by a comma and each response is separated by a newline character. If your responses contain special characters and you will open this export in Microsoft Excel we recommend using the TSV export. Qualtrics CSV exports use UTF-8 encoding, which Excel will not open correctly by default. [Learn More](#)

☒ Download all fields

☐ Use numeric values

☒ Use choice text

[More Options](#) [Close](#) [Download](#)

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

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.

Download a data table

CSV

TSV


Excel

XML

SPSS

Google Drive

User-submitted files



Statistical Analysis Package

Statistical Package for the Social Sciences (SPSS) is one of the most widely used software packages for survey analysis. This is an SPSS sav data file with raw data, variable and value labels.
[Learn more](#)

☒ Download all fields

String Width:

Medium - 2,000

☐ Compress data as .zip file

☐ Use commas for decimals

☐ Recode seen but unanswered questions as -99

☐ Recode seen but unanswered multi-value fields as 0

☐ Export viewing order data for randomized surveys


☐ Exclude survey response edits

☐ Include download links for user-uploaded files

Alternatively, download the following SPSS files:
[SPSS Syntax File](#) [Corresponding Data](#)

[Fewer Options](#)

Close

 **Download**

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.

CSV

TSV


Excel

XML

SPSS

Google Drive

User-submitted files



Statistical Analysis Package

Statistical Package for the Social Sciences (SPSS) is one of the most widely used software packages for survey analysis. This is an SPSS sav data file with raw data, variable and value labels.
[Learn more](#)

☒ Download all fields

String Width:

Medium - 2,000

☐ Compress data as .zip file

☐ Use commas for decimals

☐ Recode seen but unanswered questions as -99

☐ Recode seen but unanswered multi-value fields as 0

☐ Export viewing order data for randomized surveys

☐ Exclude survey response edits


☐ Include download links for user-uploaded files

Alternatively, download the following SPSS files:

[SPSS Syntax File](#) [Corresponding Data](#)

[Fewer Options](#)

Close

 Download

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.

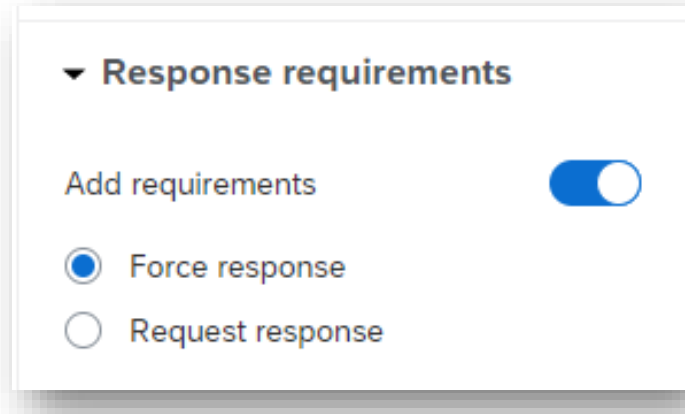
Be sure to think though what would be valid.

- 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.

The screenshot displays the 'Response requirements' section of a survey question editor. It includes a toggle for 'Add requirements' (disabled) and a toggle for 'Add validation' (enabled). Below these is a 'Content type' dropdown menu, which is highlighted with a red arrow. The dropdown menu is open, showing options: 'Email address', 'Phone number', 'US state', 'Postal code', 'Date format', 'Number', and 'Text only'. A hand cursor is positioned over the 'Email address' option. A secondary panel is visible in the foreground, showing the 'Add validation' settings for the 'Number' content type. This panel includes a toggle for 'Add validation' (enabled), a 'Content type' dropdown set to 'Number', and input fields for 'Minimum', 'Maximum', and 'Maximum decimals'.

Requiring Response

Design your web surveys to help prevent respondents from accidentally 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)

Response requirements

Add requirements ☒

☒ Force response
☐ Request response

Add validation ☒

Choice Randomization

Randomization

☐ No Randomization
☒ Display answers in a random order
☐ Present only of total choices
☐ Randomly flip the order of choices
☐ Advanced Randomization [Set Up Advanced Randomization](#)

visited

Have you visited the library this semester?

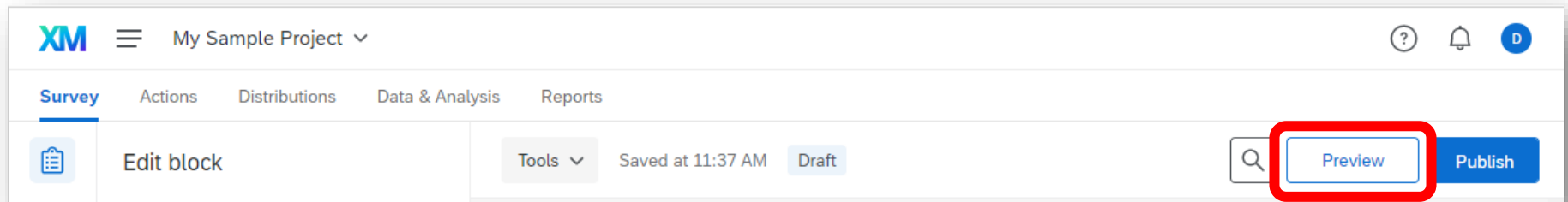
☐ Yes, I have
☐ No, I have not

Recoded Values

☒ Recode Values ☒ Variable Naming

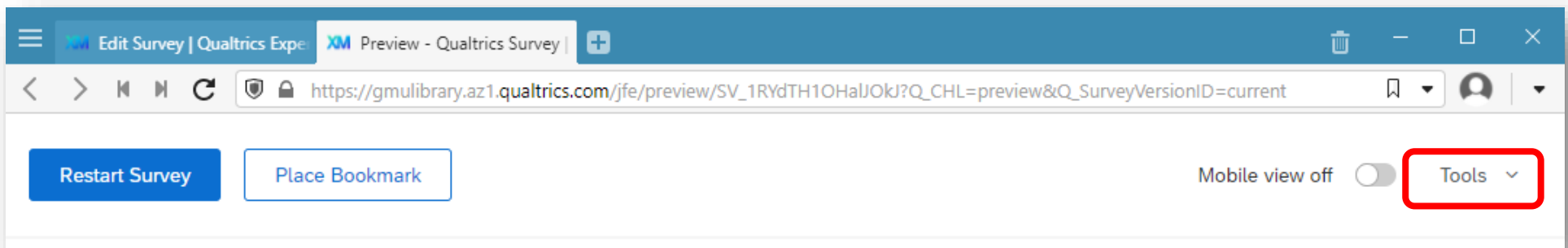
1	Visited	Yes, I have
0	Didn't	No, I have not

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.

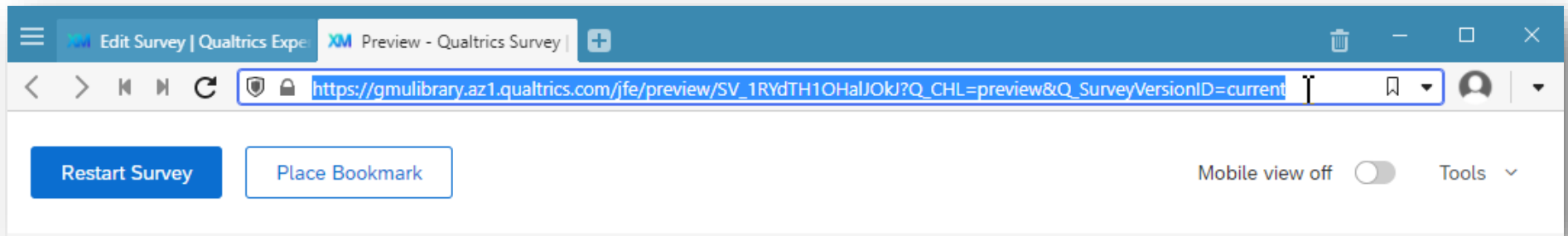
Click Tools to see options that make it easier to go through it multiple times.
You can ignore any validation you add (see another slide) or see hidden questions.



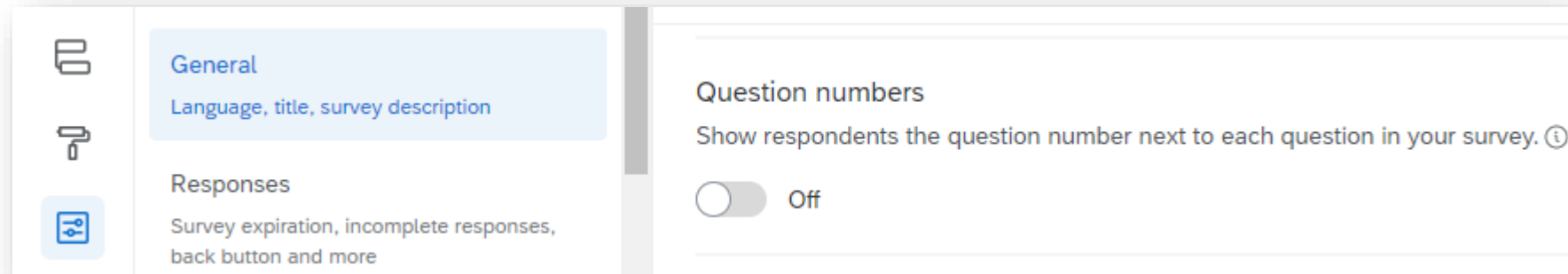
Expert Review

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:



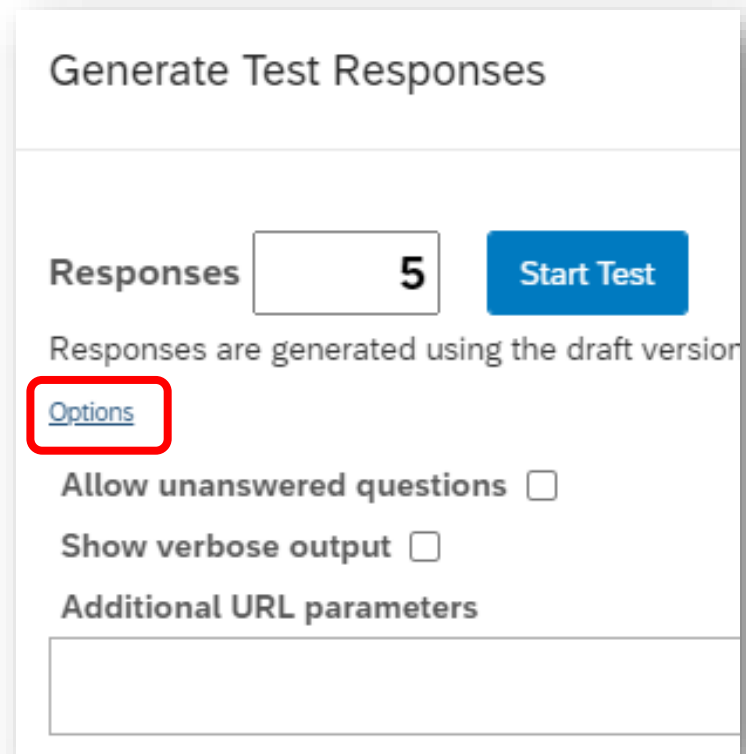
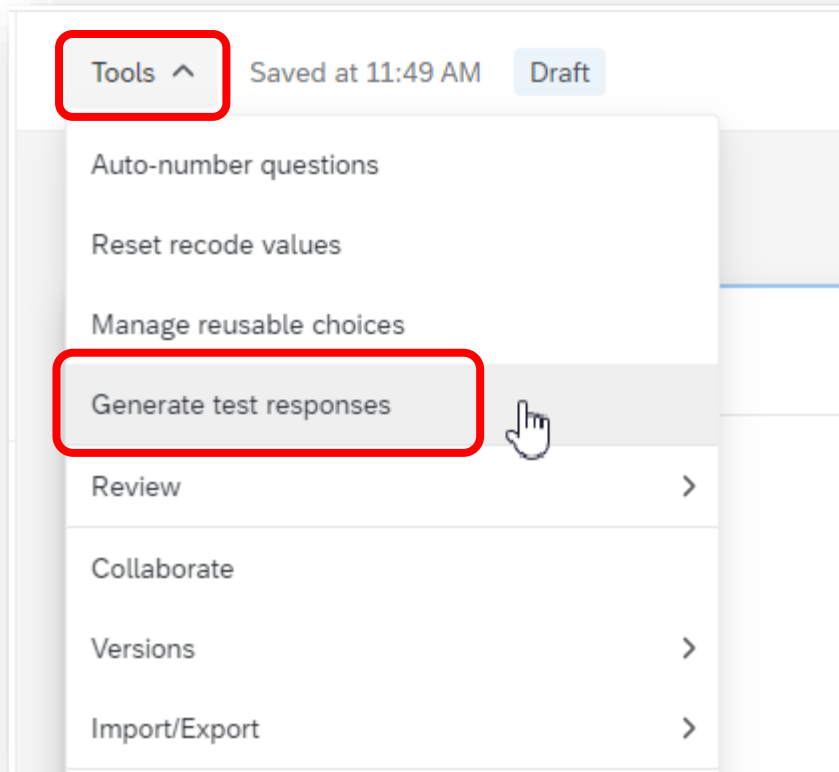
- **Export Survey to Word** (in Tools); it shows technical info better than “Print Survey”
- Send them a “real” survey link as if they were a participant. It is useful to enable “Question Numbers” in Survey Options during this testing period so you can more easily discuss particular questions (don’t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



Testing Logic

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

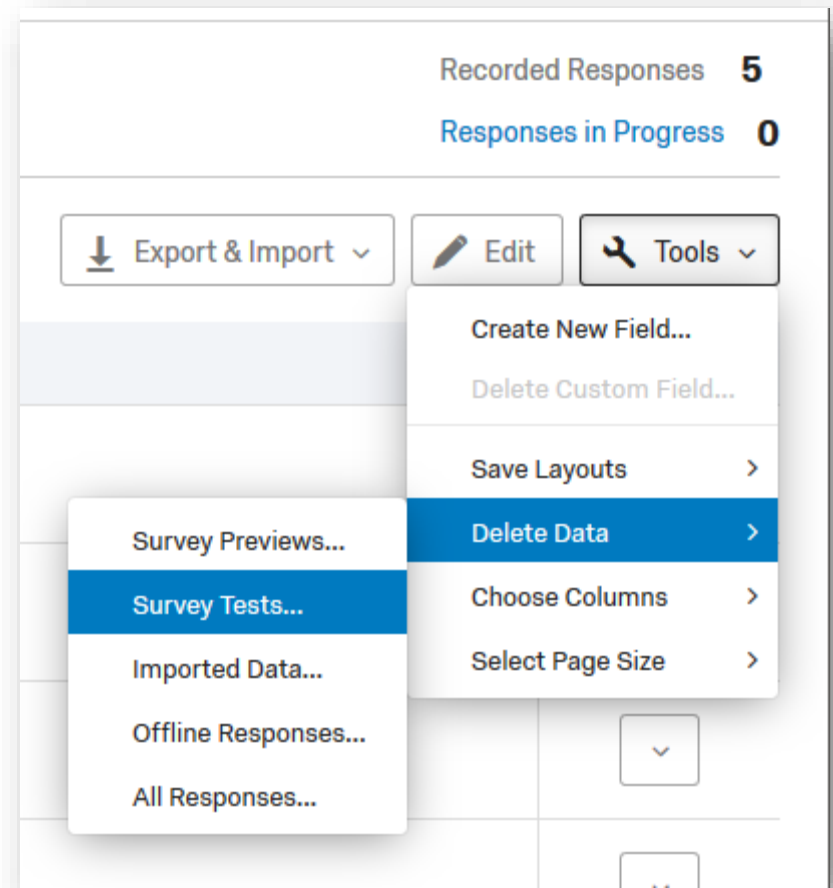
It will help you check that it is working as planned by having a computer complete the survey. It will give random responses and then act accordingly. For instance, if a particular answer means to skip over a question, the computer will skip that question.



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.



IRB Concerns

Security

Qualtrics has security.... do YOU?

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

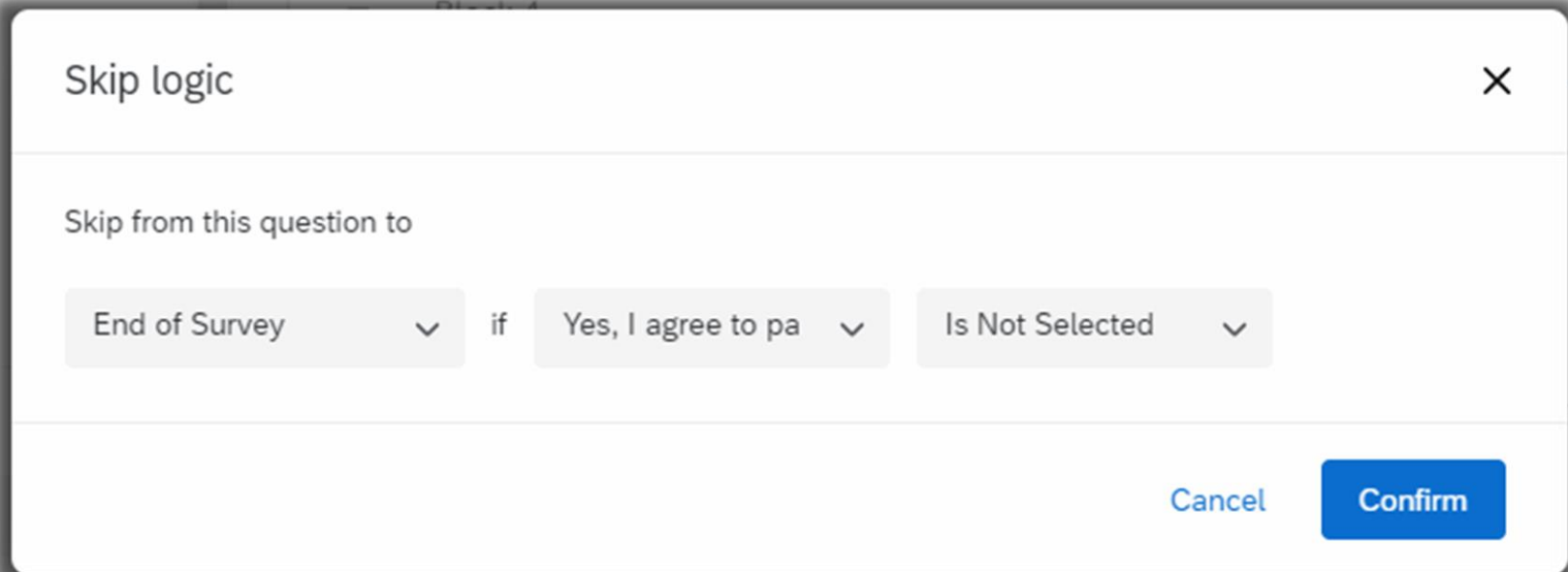
If your data is **confidential**, and especially if it is sensitive, the IRB will want to know how you will maintain the security of your data in both:

- **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.

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



The screenshot shows a 'Skip logic' dialog box with a close button (X) in the top right corner. Below the title, the text 'Skip from this question to' is followed by three dropdown menus. The first dropdown is set to 'End of Survey', followed by the word 'if', then a second dropdown set to 'Yes, I agree to pa', and finally a third dropdown set to 'Is Not Selected'. At the bottom right, there are two buttons: 'Cancel' and 'Confirm'.

Skip logic

Skip from this question to

End of Survey ▼ if Yes, I agree to pa ▼ Is Not Selected ▼

Cancel Confirm

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**.

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:

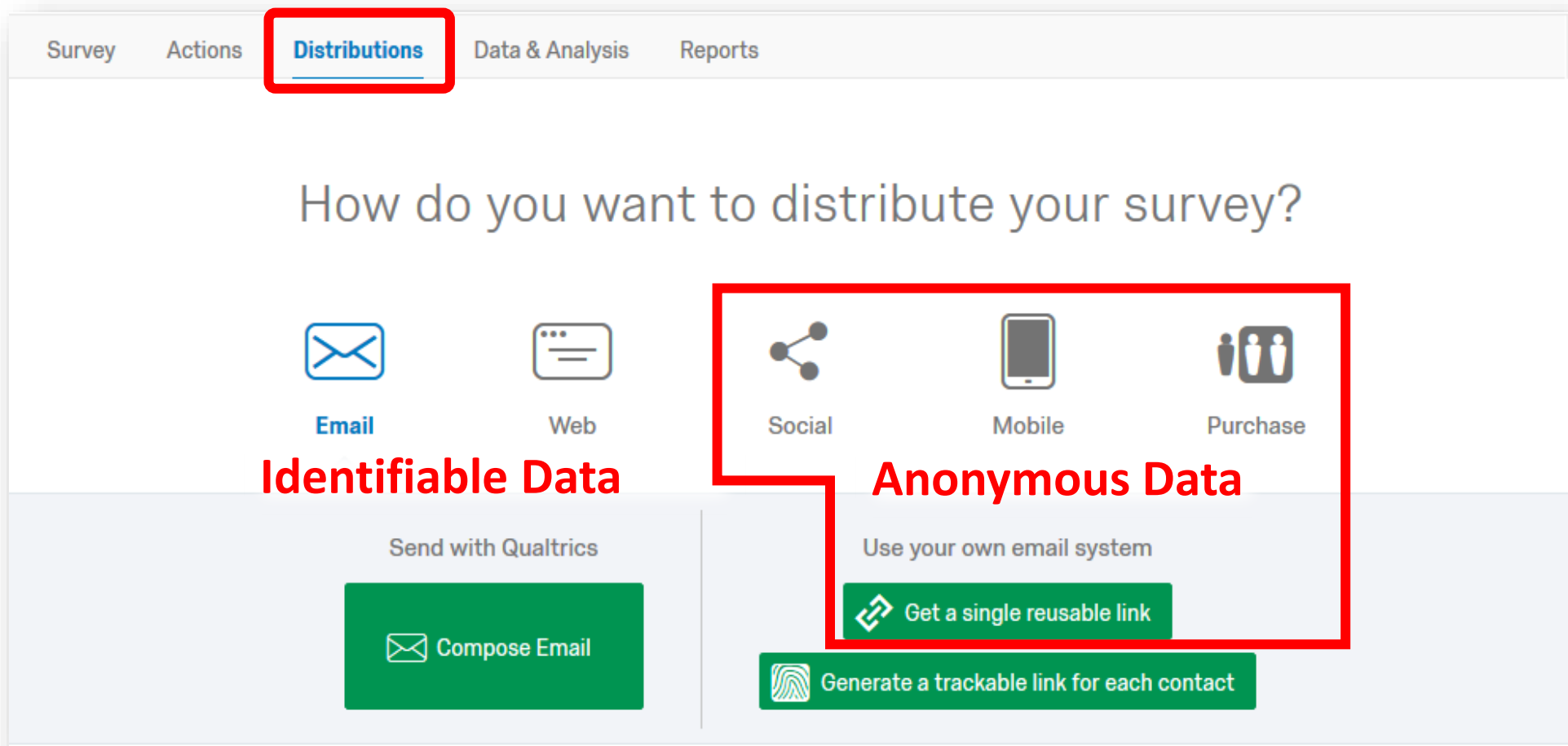
- Getting people to **start** your survey
 - Make invitations as personal as possible
 - Make yourself seem reputable and trustworthy
 - Explain why the research will ultimately benefit them
- Getting those who start to **finish**
 - Start with “easy” questions, put hard or sensitive ones later
 - Start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

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

Distributions

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

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



The screenshot shows the Qualtrics interface with the 'Distributions' tab selected in the top navigation bar. The main heading asks 'How do you want to distribute your survey?'. Below this, there are three categories of distribution methods: 'Email' and 'Web' (grouped under 'Identifiable Data') and 'Social', 'Mobile', and 'Purchase' (grouped under 'Anonymous Data'). The 'Anonymous Data' section is highlighted with a red box. The 'Email' section includes a 'Send with Qualtrics' option with a 'Compose Email' button. The 'Anonymous Data' section includes a 'Use your own email system' option with two buttons: 'Get a single reusable link' and 'Generate a trackable link for each contact'.

Survey Actions **Distributions** Data & Analysis Reports

How do you want to distribute your survey?

Email Web Social Mobile Purchase

Identifiable Data

Send with Qualtrics

Compose Email

Anonymous Data

Use your own email system

Get a single reusable link

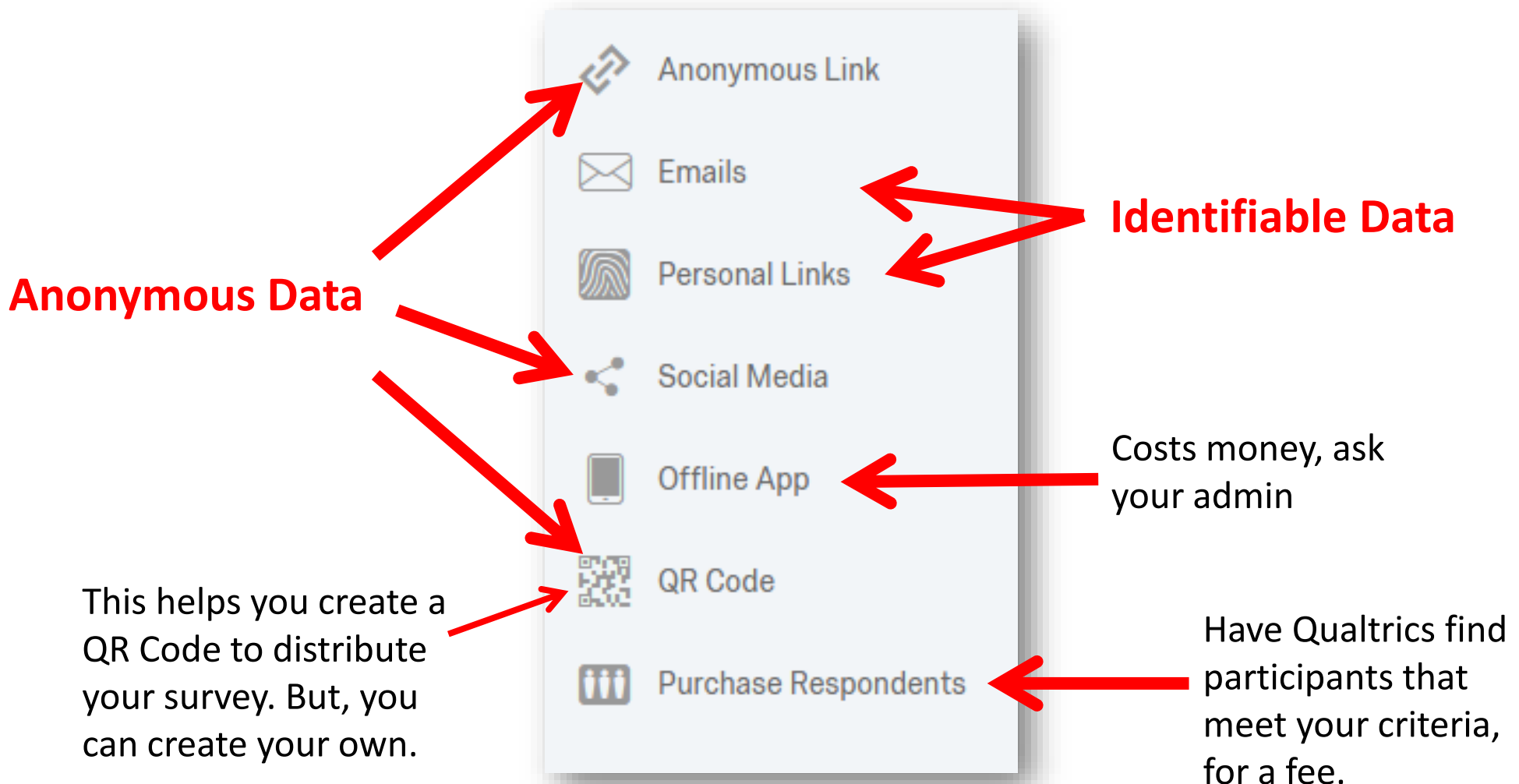
Generate a trackable link for each contact

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.



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}`

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.

Branch on Successful Authentication

Authentication Type: **Contact**

Authenticate Using Contact

My Library: Debby Kermer Grad1 By Dept - Random Sample

Authentication Fields

Email Please enter your email: ☐ Password ☐ Prefill

Please log in.

Please enter your email:

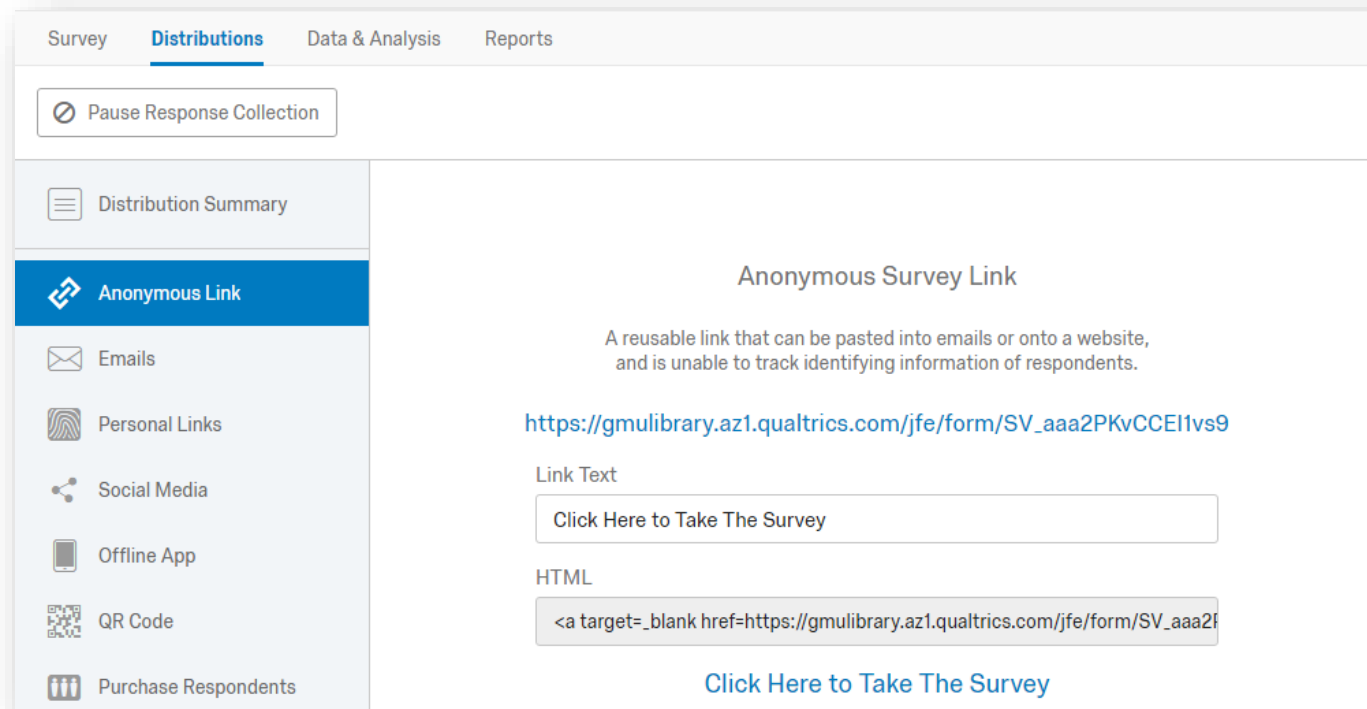
Next >>

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.



The screenshot shows the Qualtrics interface for the 'Distributions' module. The left sidebar contains a menu with options: 'Distribution Summary', 'Anonymous Link' (highlighted in blue), 'Emails', 'Personal Links', 'Social Media', 'Offline App', 'QR Code', and 'Purchase Respondents'. The main content area is titled 'Anonymous Survey Link' and includes a description: 'A reusable link that can be pasted into emails or onto a website, and is unable to track identifying information of respondents.' Below this, the URL 'https://gmulibrary.az1.qualtrics.com/jfe/form/SV_aaa2PKvCCEI1vs9' is displayed. There are input fields for 'Link Text' (containing 'Click Here to Take The Survey') and 'HTML' (containing '<a target=_blank href=https://gmulibrary.az1.qualtrics.com/jfe/form/SV_aaa2f'). At the bottom, a blue button labeled 'Click Here to Take The Survey' is visible.

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 are 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

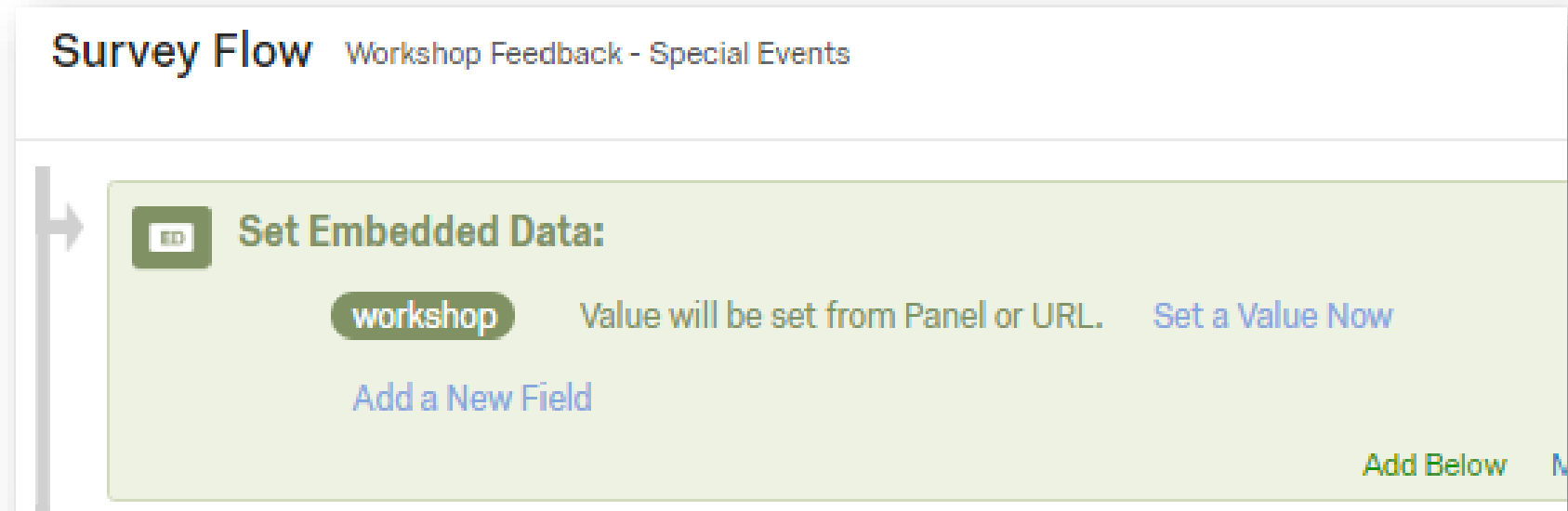
Embedded Data

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

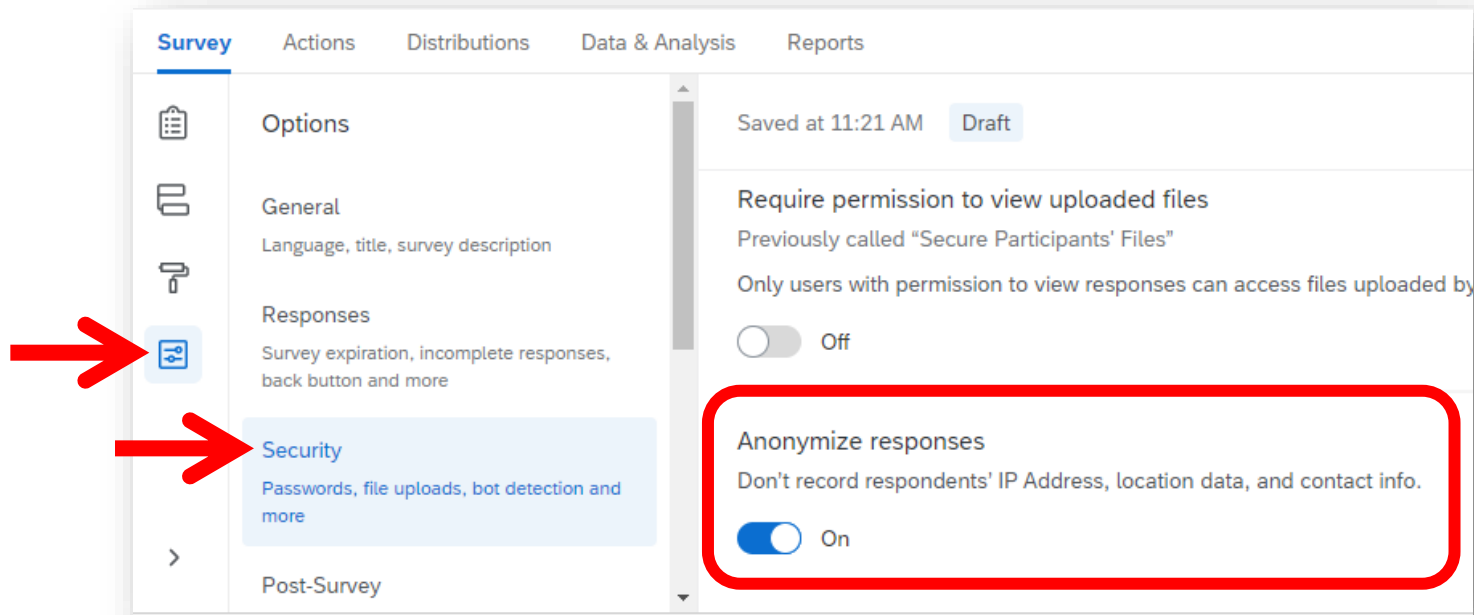
In **Survey Flow**, you must have Qualtrics save this information as a variable with **Set Embedded Data**. Do NOT use this method to track individuals, that is personal links.



<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.

Save & Continue

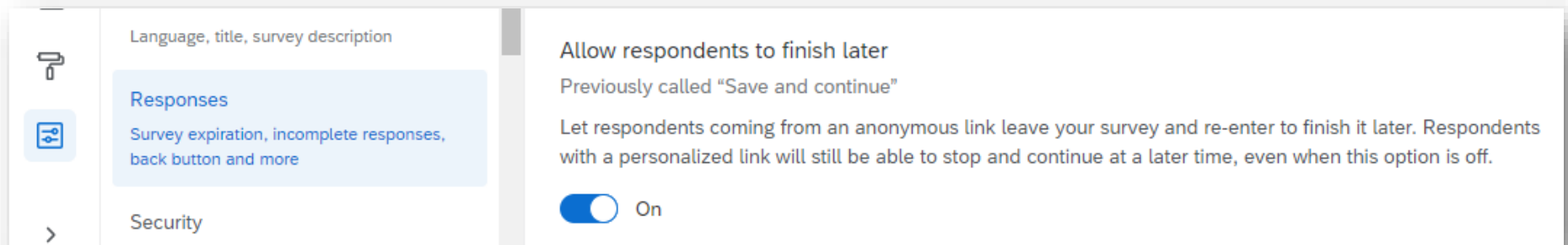
Especially if your survey is long, people may want or need to stop and resume later.

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.



Incomplete Responses

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

Recorded Responses 18

Responses in Progress 0

Export & Import

Tools

The screenshot shows the Qualtrics survey configuration interface. On the left is a sidebar with icons for General, Responses, Security, and Post-Survey. The 'Responses' section is selected and highlighted in blue. The main content area is titled 'Incomplete survey responses' and includes the following text: 'Previously called "Partial completion"', 'Select what to do with incomplete responses and indicate when they should be recorded', and 'What should be done with incomplete survey responses?'. There are two radio button options: 'Record' (selected) and 'Delete'. Below this is a question 'How much time should pass before they're considered incomplete?' with a dropdown menu set to '1 Week'.

General
Language, title, survey description

Responses
Survey expiration, incomplete responses, back button and more

Security
Passwords, file uploads, bot detection and more

Post-Survey
Thank you emails, completed survey

Incomplete survey responses
Previously called "Partial completion"

Select what to do with incomplete responses and indicate when they should be recorded
[More](#)

What should be done with incomplete survey responses?

☒ Record
☐ Delete

How much time should pass before they're considered incomplete?

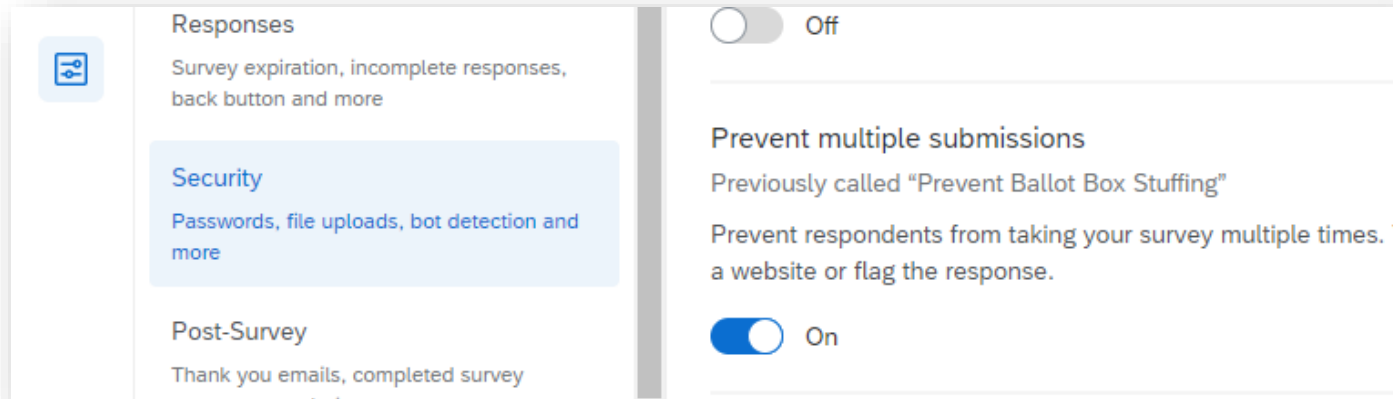
1 Week

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.

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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