

Using Qualtrics Effectively

by Debby Kermer

George Mason University Libraries

Digital Scholarship Center

Use the Help

The image shows a screenshot of the Qualtrics user interface. At the top, there is a navigation bar with the XM logo, a menu icon, and the text "My Sample Survey". On the right side of the navigation bar, there are three icons: a question mark (help), a bell (notifications), and a profile icon (G). A red arrow points to the question mark icon. Below the navigation bar, a help modal is open. The modal has a title "Help" and a close button (X). The main content of the modal includes the XM logo and the text "qualtrics SUPPORT". Below this, there is a paragraph: "Qualtrics Support is your one-stop shop to learn how to use any part of the Qualtrics Platform. An entire library of articles, manuals, and troubleshooting tools - right at your fingertips." There are two buttons: "SUPPORT SITE" (highlighted with a red box) and "CONTACT SUPPORT". Below the buttons, there is a link to "Qualtrics Community" and a link to "XM Basecamp". At the bottom right of the modal is a "Close" button. To the right of the modal, there are two large icons: "SURVEY PLATFORM" (highlighted with a red box) and "TRAINING ON XM BASECAMP".

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

Tutorials

The image shows a screenshot of 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), 'GETTING STARTED' (with a dropdown arrow), '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', 'Admin Basic Overview', and 'INFORMATION FOR SURVEY TAKERS'. A 'Feedback' button is located to the left of the menu. On the right is the 'Projects Basic Overview' page, featuring the Qualtrics logo and a 'WHAT'S ON THIS PAGE:' section 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'. Below this is the main heading 'About the Projects Page' and a paragraph explaining that all Qualtrics sessions begin on the 'Projects' page, which lists all XM projects. A screenshot of the 'Projects' page is shown below the text, with a red arrow pointing to the 'Projects' link in the left-hand navigation pane of the screenshot. The screenshot also shows a dashboard with statistics: '0 My team's active tickets', '18 My tickets spent more than 24 hours', '0 My new tickets in 24 hours', and '0 minutes Avg. resolution time'. A 'Create new project' button is visible in the bottom right of the screenshot.

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

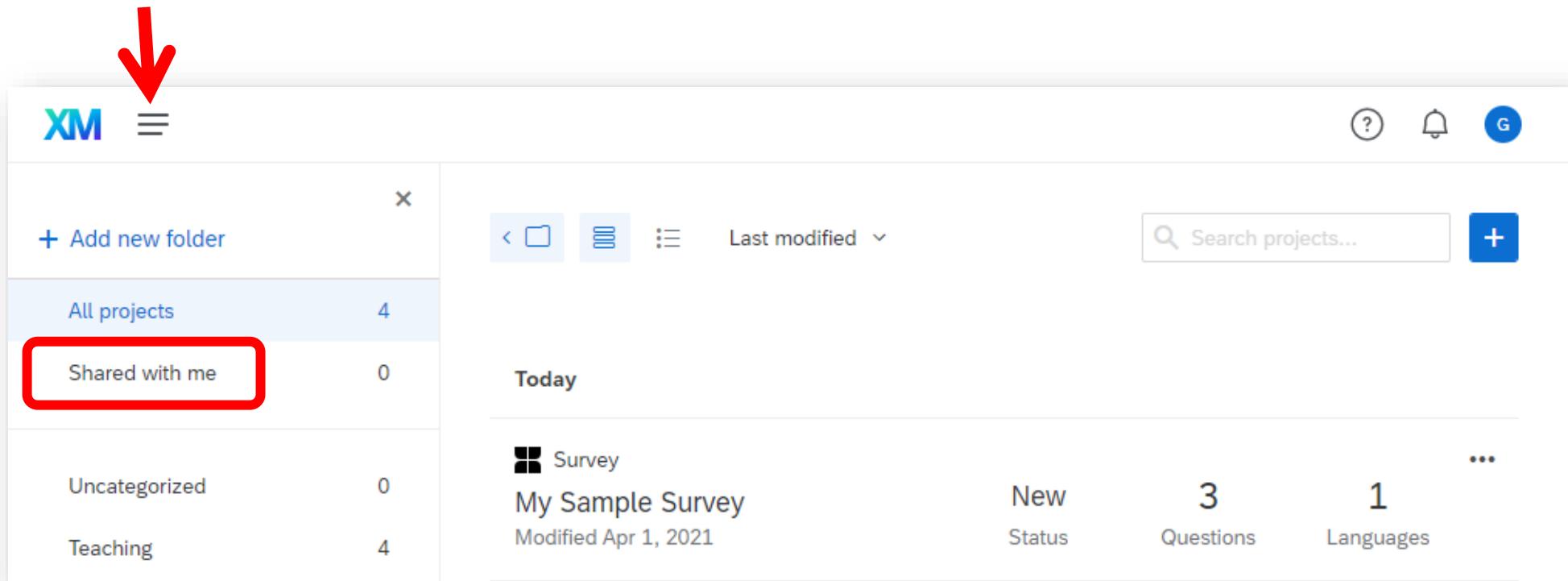
Main Screen

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.



The screenshot shows the XM main screen. On the left is a navigation menu with the following items:

Folder Name	Count
+ Add new folder	x
All projects	4
Shared with me	0
Uncategorized	0
Teaching	4

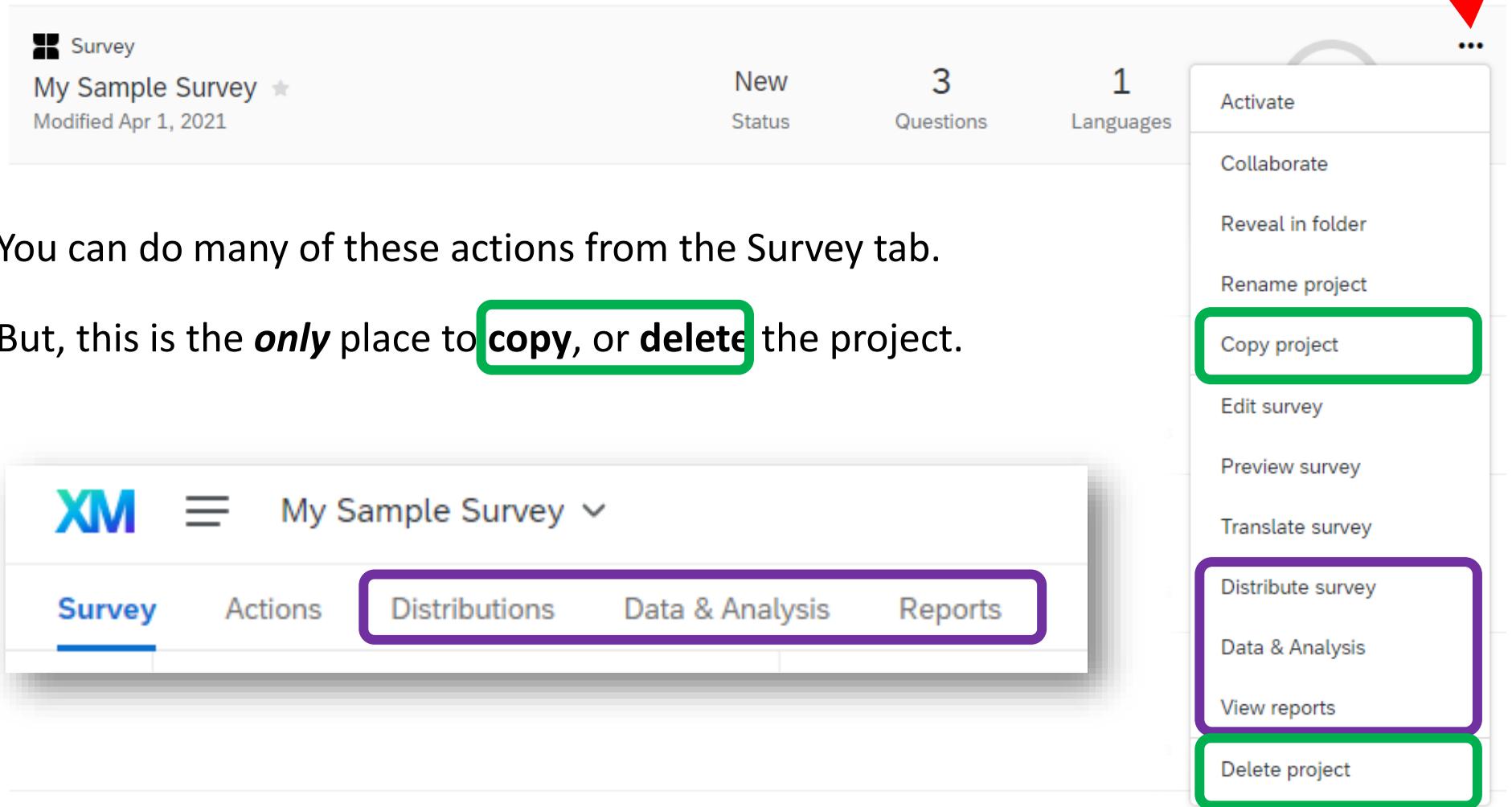
The 'Shared with me' folder is highlighted with a red box. On the right, the main content area shows a search bar and a list of projects. The first project is:

Project Name	Status	Questions	Languages
My Sample Survey	New	3	1

The project 'My Sample Survey' is modified on Apr 1, 2021.

Project Options

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



The screenshot displays a survey management interface. At the top, a header bar shows the survey name "My Sample Survey" with a star icon, a "New Status" button, and statistics for "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 the header, a navigation bar features the "XM" logo, a hamburger menu icon, and the survey name "My Sample Survey" with a dropdown arrow. The navigation bar includes tabs for "Survey", "Actions", "Distributions", "Data & Analysis", and "Reports". The "Survey" tab is active, and the "Distributions", "Data & Analysis", and "Reports" tabs are highlighted with a purple box.

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

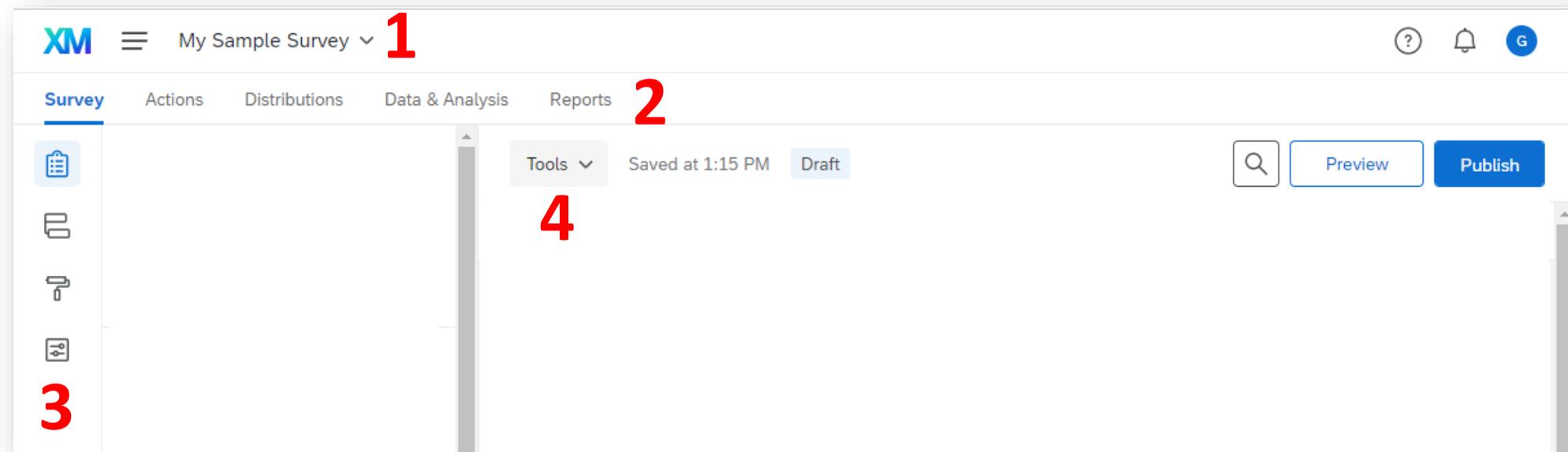
To edit the Survey, click a project or choose **Edit Survey** from the drop-down menu.

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.

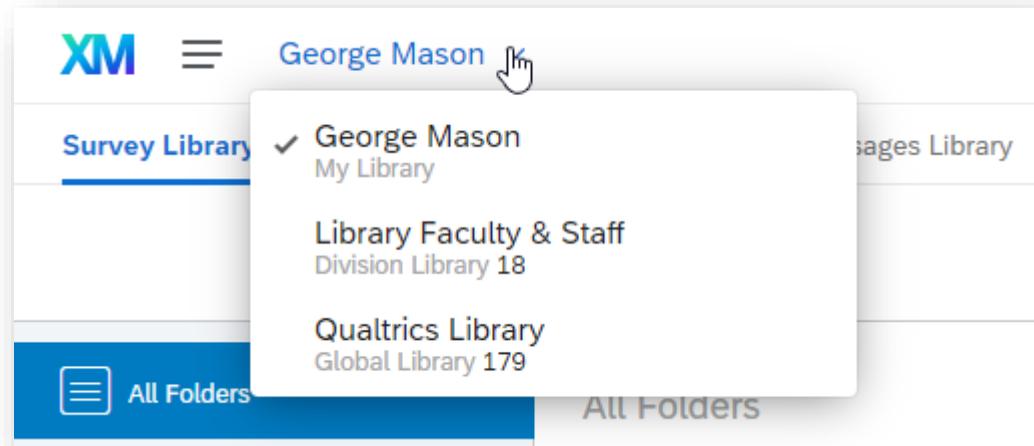
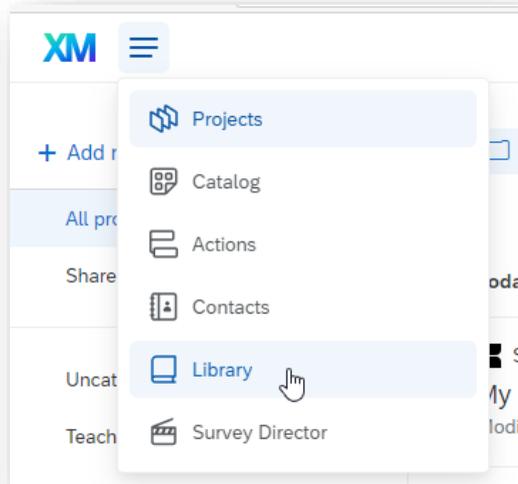
Be sure to choose appropriate permissions.

The screenshot displays the Qualtrics Survey platform interface. At the top, a survey titled "My Sample Survey" is shown, modified on Apr 1, 2021. It has a status of "New", 5 questions, and 1 language. A dropdown menu is open, showing options: "Activate", "Collaborate" (highlighted with a mouse cursor), and "Reveal in folder". Below this, a "Collaborate on Project: My Sample Project" dialog box is open. It features a search input field, an "Add" button, and a link to "User and Group Address Book". Below the search field is a table with columns for "User", "Edit", "View Reports", "Activate/Deactivate", "Copy", and "Distribute". One user, "George Mason (gmason)", is listed with a checked "Details" checkbox under the "Edit" column and a red minus sign in the "Distribute" column.

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

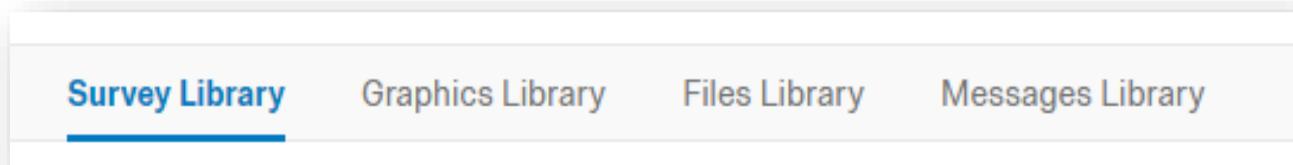
You can **store** and **retrieve** survey elements in the various Qualtrics' Libraries.



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.

The image shows the Qualtrics 'Create a Project' interface. On the left, a sidebar lists options: 'New, Blank Project', 'Create From Existing' (with sub-options 'From a Copy' and 'From a Library' selected), and 'From a File'. The main area is titled 'Create a Project from a Library'. Two overlapping 'Block Questions' preview windows are shown. The top window displays a list of questions: 'What is your year of birth?', 'What is the highest level of school you...', 'Are you Spanish, Hispanic, or Latino', 'Are you Spanish, Hispanic, or Latino', 'Choose one or more races that you c...', 'What is your sex?', 'Information about income is very im...', and 'What is your ZIP code?'. The 'Preview Area' on the right shows 'What is your ZIP code?'. The bottom window displays a list of states: '50 States, D.C. and Puerto Rico'. The 'Preview Area' on the right shows 'In which state do you currently...' with a dropdown menu listing states: Alabama, Alaska, Arizona, Arkansas, California, Colorado, Connecticut, Delaware, District of Columbia, Florida, Georgia.

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.

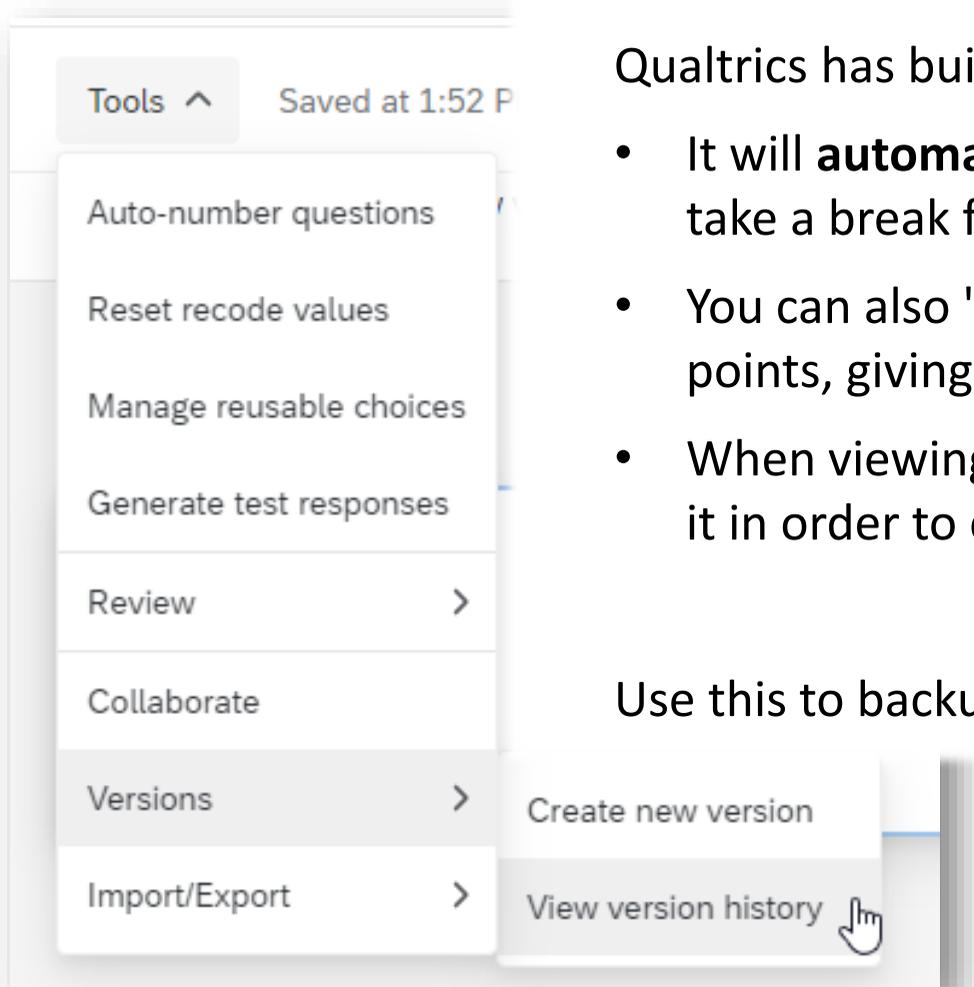
Backups



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.



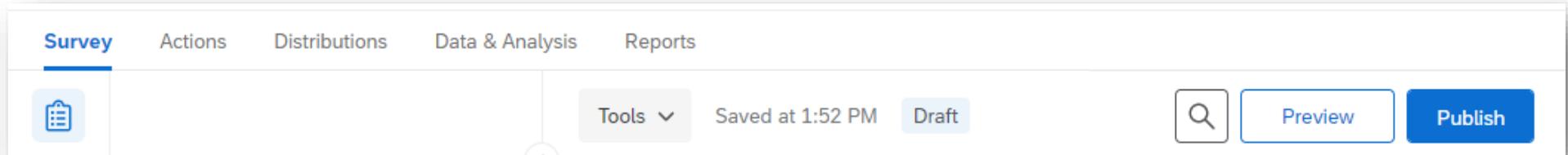
Publishing

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 'Print Survey' option is selected in the dropdown menu. The background shows a survey question about internet usage and a table for web access locations.

Tools ^ Save

Auto-number questions
Reset recode values
Manage reusable questions
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)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
From work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
From school	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
From a public terminal (e.g. library, cybercafe, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<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 a warning message and four checked options: 'Show Question Numbers', 'Show Logic', 'Show Coded Values', and 'Strip HTML Tags from all Questions and Answers'. The background shows a survey question about internet usage and a table for web access locations.

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.

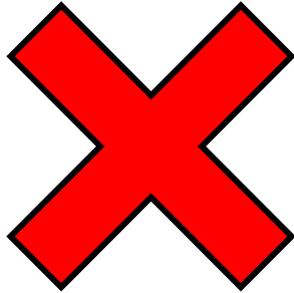
DO give each question a unique, useful, and uncomplicated name.

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?

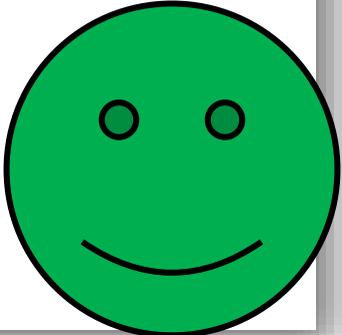
- 1 - Never
- 2 - Rarely
- 3 - Sometimes
- 4 - Often



lib_use

How often do you go to the Library?

- Never
- Rarely
- Sometimes
- Often



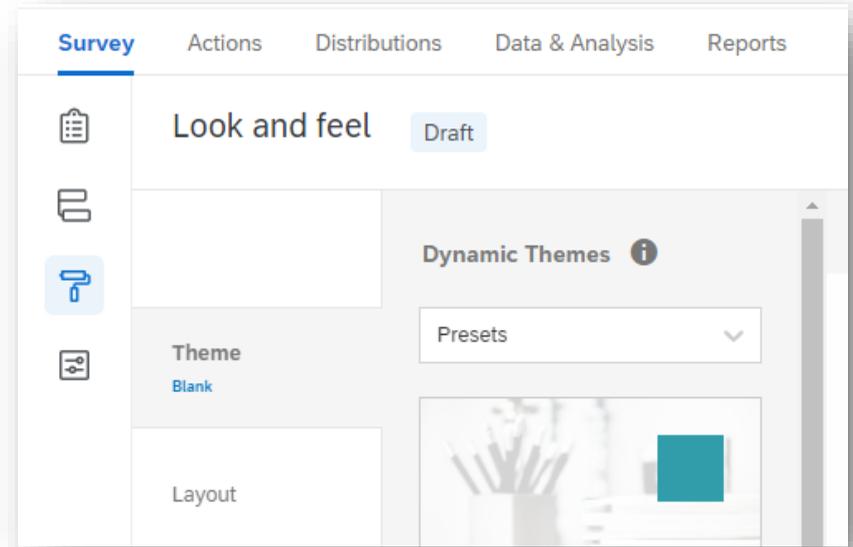
Rich Content Editor... Piped Text...

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', 'Faculty', 'Staff', and 'Other'. The 'Graduate Student' option is selected, indicated by a red background behind the text. Below the options is a text input field.

Look and Feel - Layout

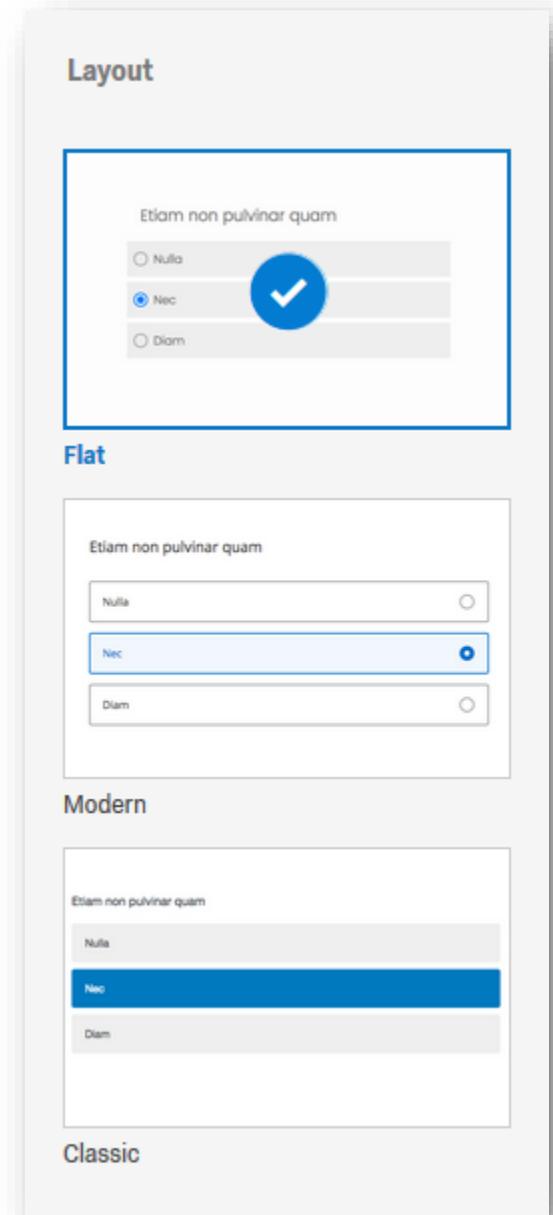
You can choose which layout best fits your questions.

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.

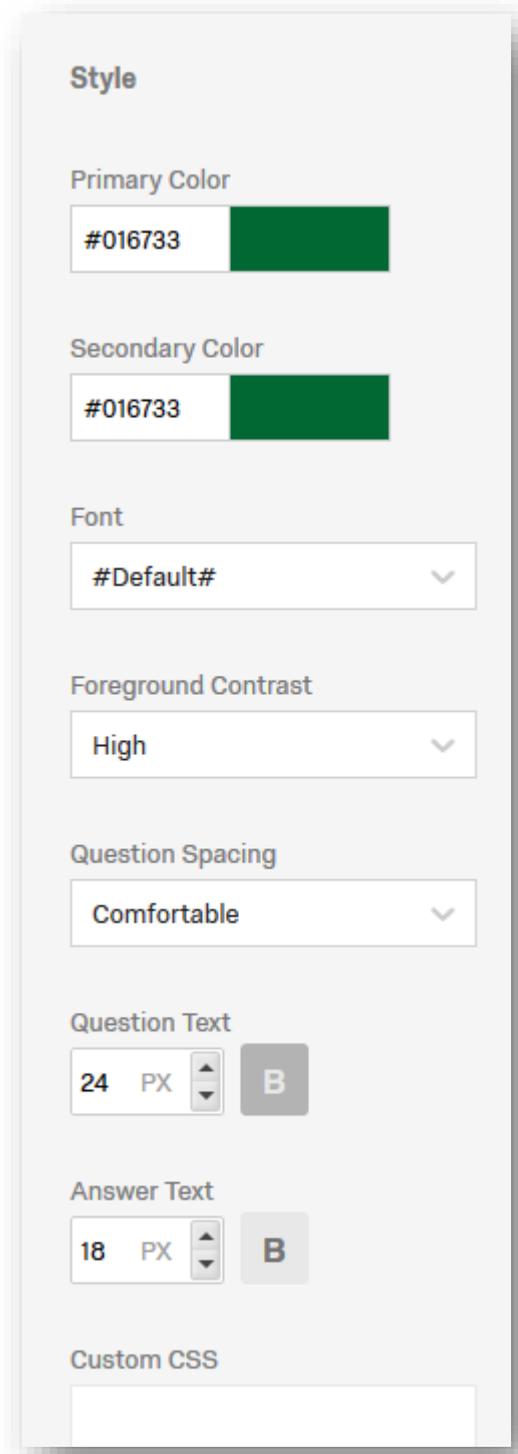
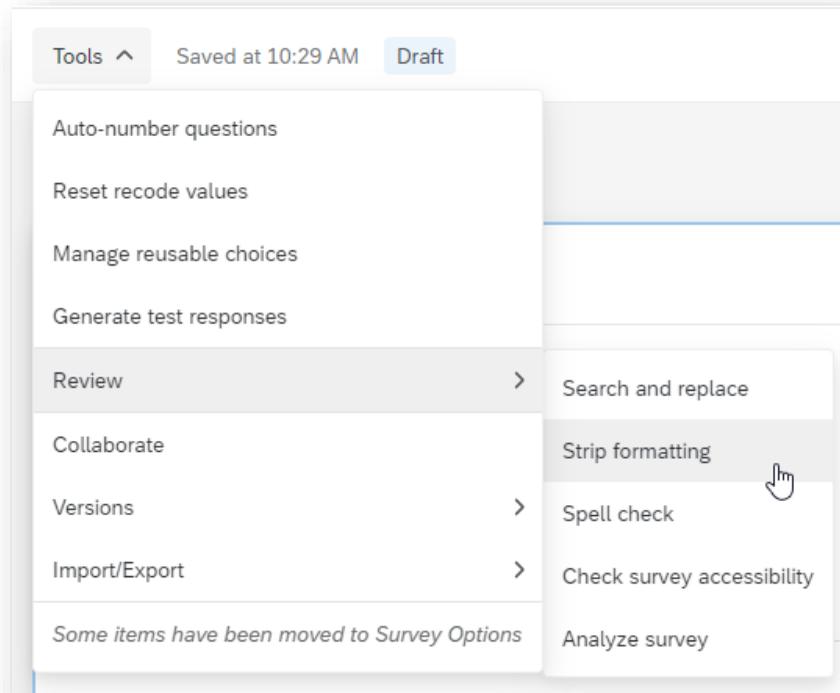


Look and Feel – Style

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

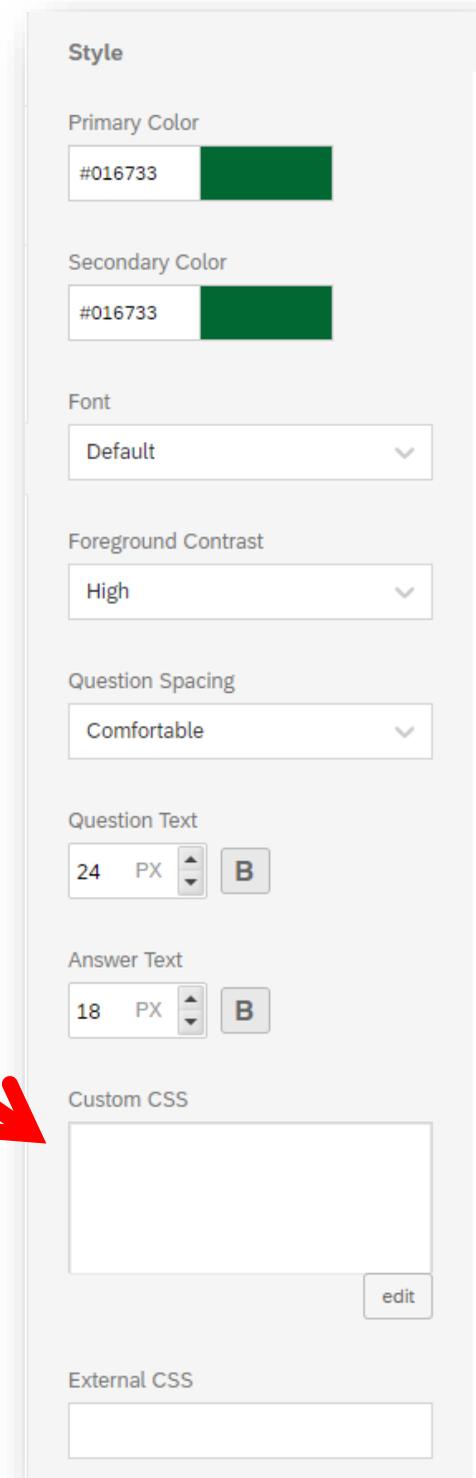
Instead, use **Look and Feel**.

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.



The image shows a vertical sidebar menu titled "Style" with several configuration options. Each option has a label, a text input field, and a dropdown arrow. The "Primary Color" and "Secondary Color" options show a color swatch next to the hex code "#016733". The "Font" option is set to "Default". The "Foreground Contrast" option is set to "High". The "Question Spacing" option is set to "Comfortable". The "Question Text" option is set to "24 PX" with a "B" button. The "Answer Text" option is set to "18 PX" with a "B" button. The "Custom CSS" option has a large empty text area and an "edit" button. The "External CSS" option has an empty text area.

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

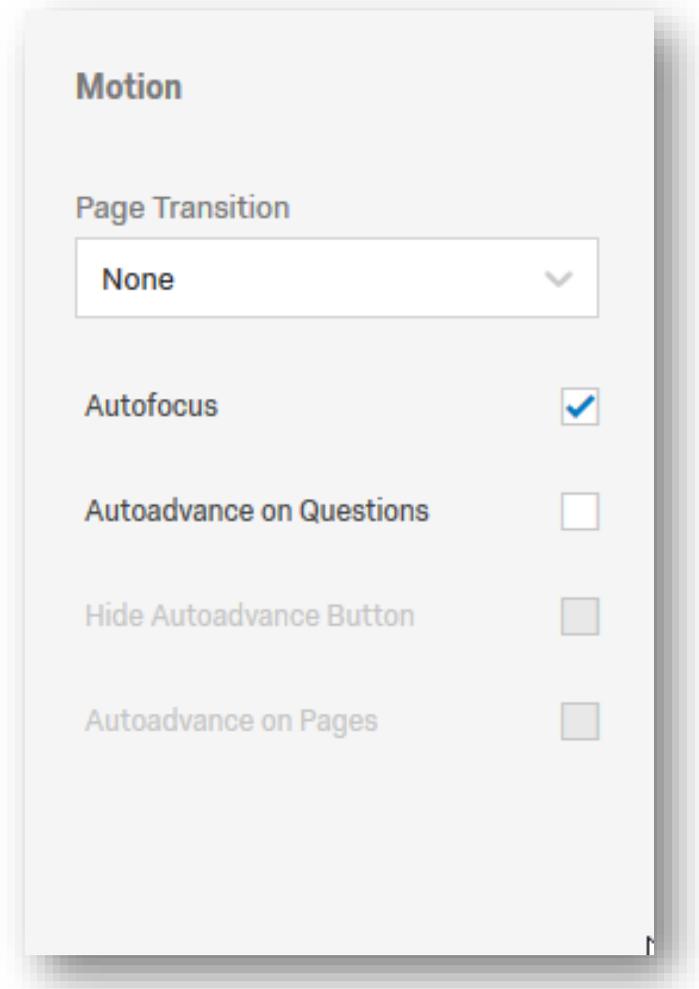
Custom CSS
[Empty text area] edit

External CSS
[Empty text area]

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.



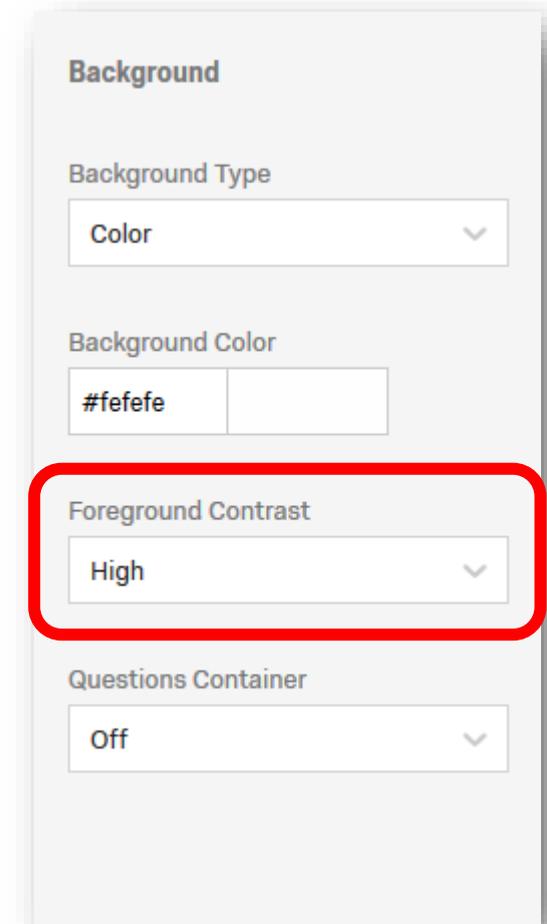
Look and Feel - Logo & Background

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.



The image shows a configuration panel for a survey. It has a light gray background and a subtle drop shadow. The panel is titled "Background" in a bold, dark gray font. Below the title, there are three sections, each with a label and a dropdown menu. The first section is "Background Type" with a dropdown menu showing "Color". The second section is "Background Color" with a text input field containing "#fefefe" and a small square color swatch to its right. The third section is "Foreground Contrast" with a dropdown menu showing "High". This section is highlighted with a red rounded rectangular border. Below the "Foreground Contrast" section is the "Questions Container" section with a dropdown menu showing "Off".

Background

Background Type
Color

Background Color
#fefefe

Foreground Contrast
High

Questions Container
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>

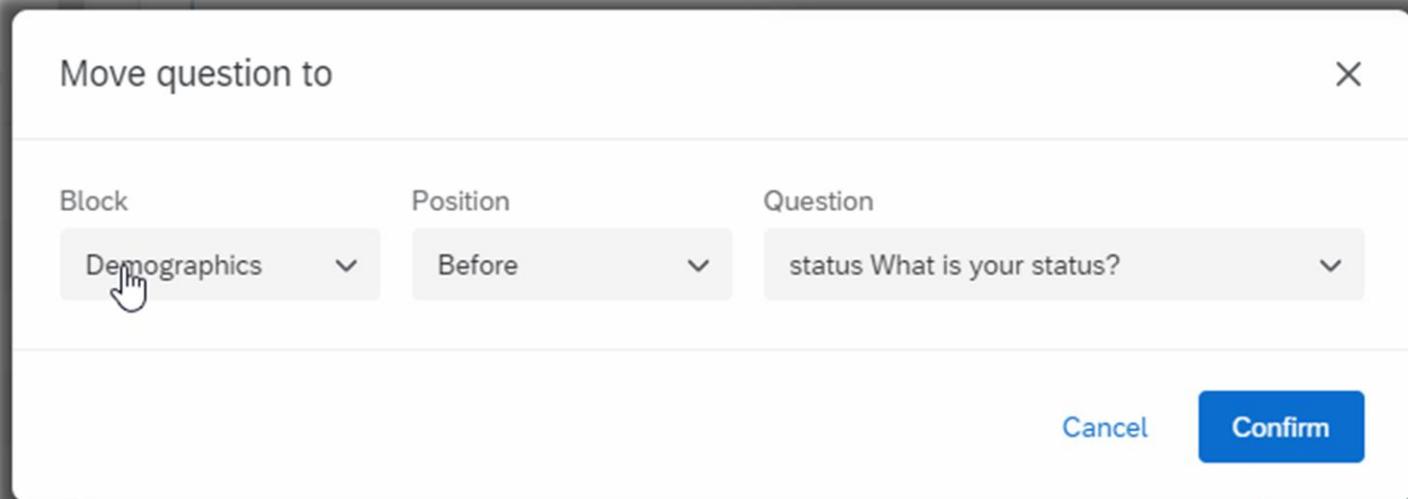
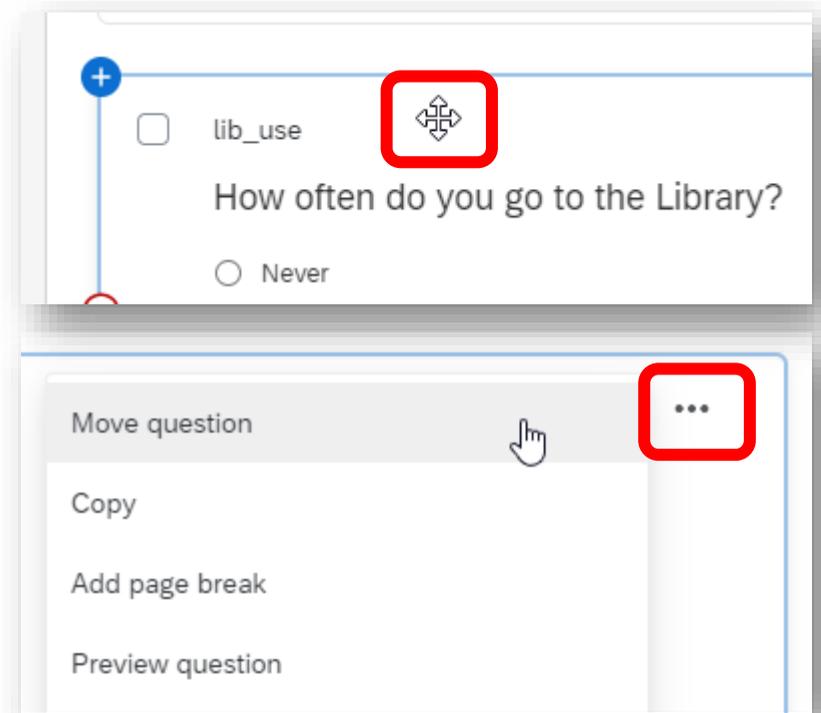
<http://www.dataunitwales.gov.uk/SharedFiles/Download.aspx?pageid=30&fileid=27&mid=64>

Moving Individual Questions

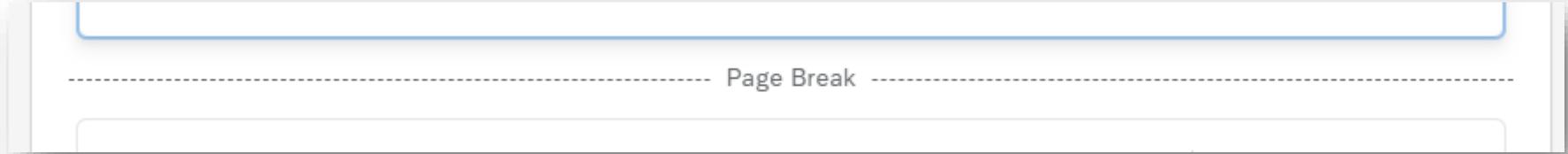
Use **drag-and-drop** for short-distance moves.

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

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



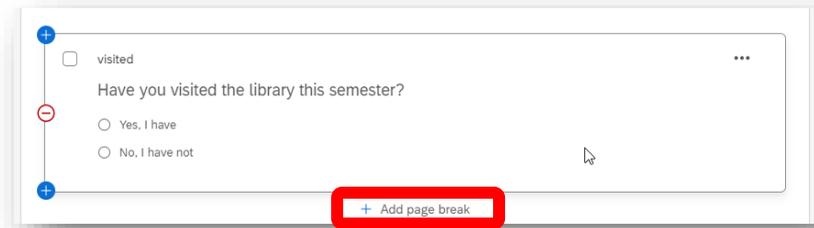
Page Breaks



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

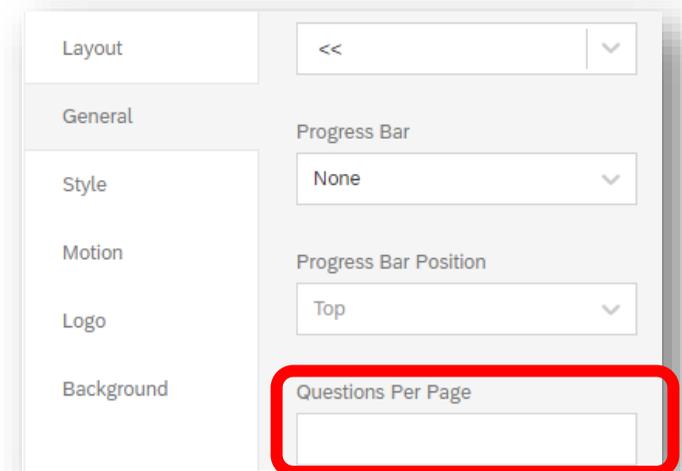
Why?

- ✓ 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



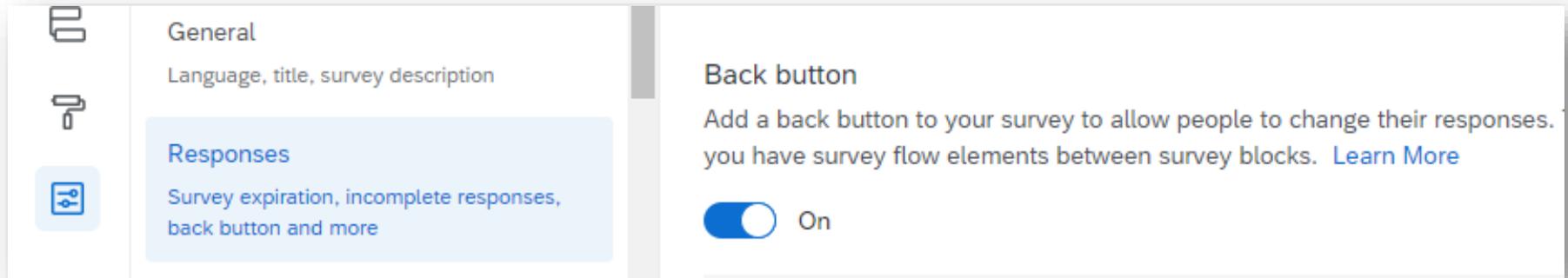
With Verbose Text



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)

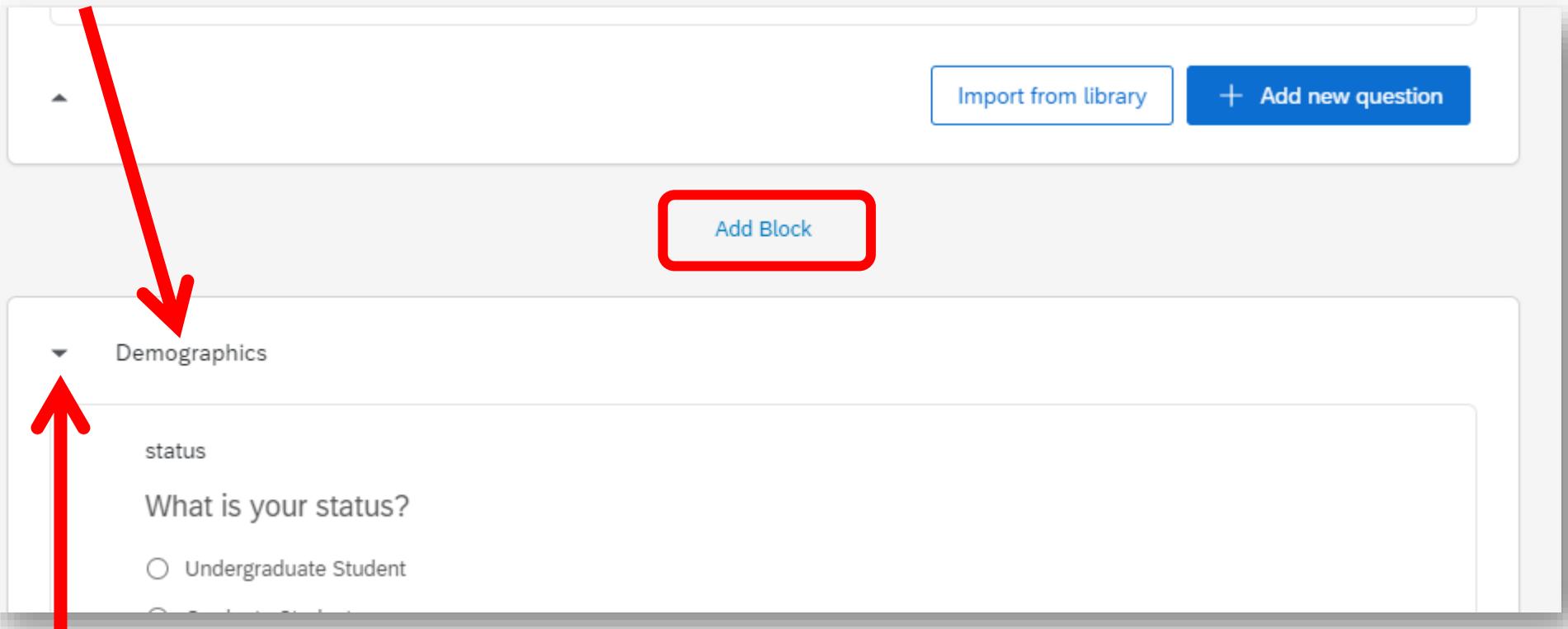
Blocks

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.



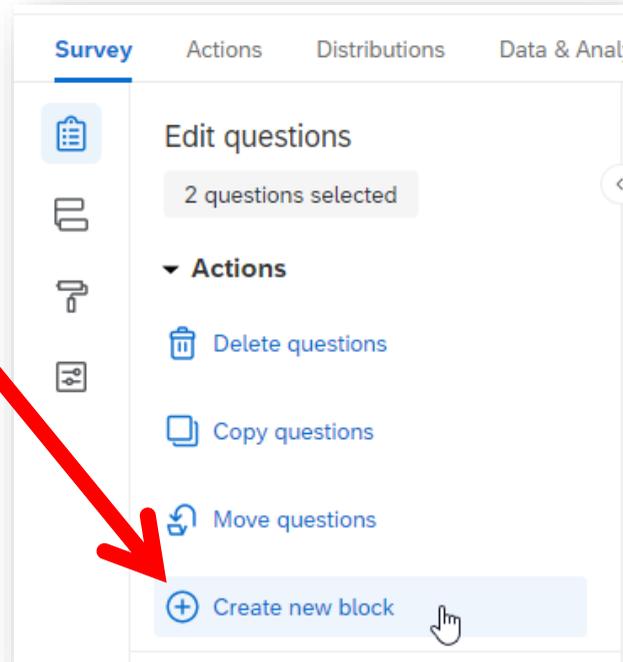
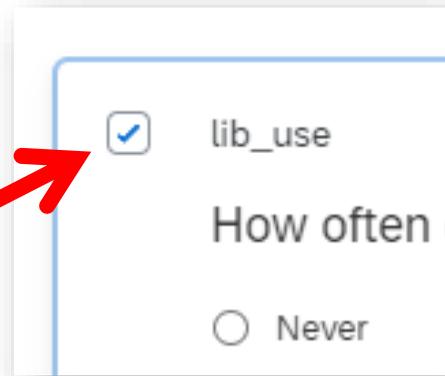
To more easily see the overall flow of your survey, minimize a block by clicking the arrow next to the name. Or, choose “Collapse Questions” from Block Options.

<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/>

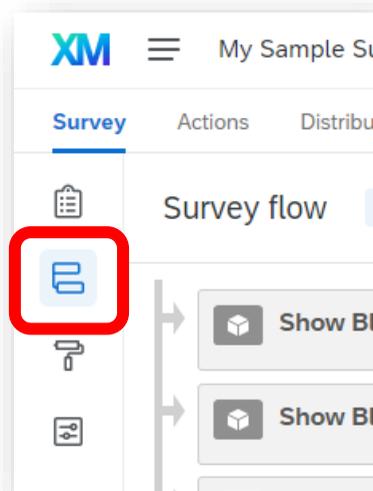
Quickly Grouping into Blocks

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



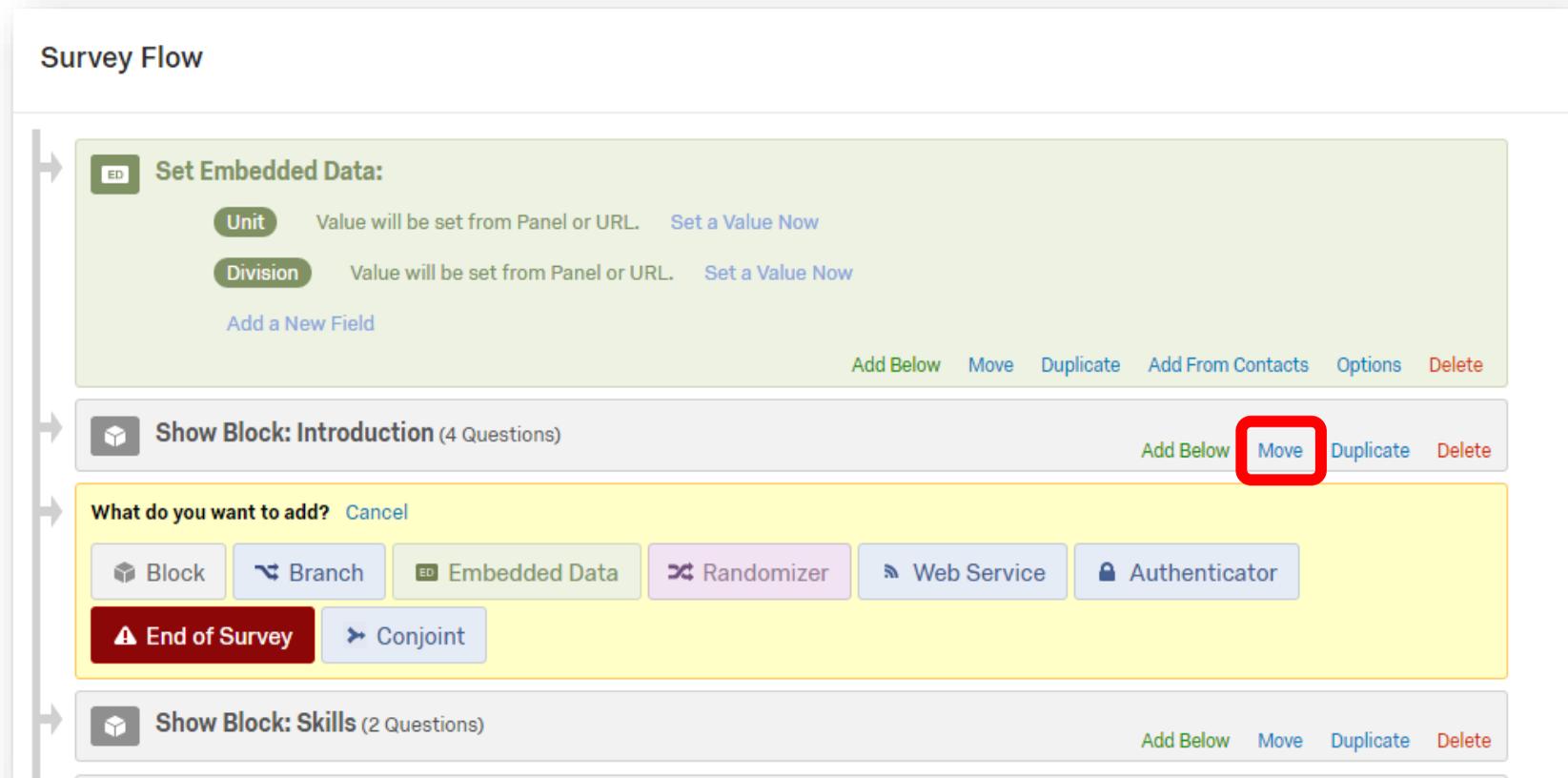
Survey Flow shows the **overall order** of your survey by showing the blocks.

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

A screenshot of the Survey Flow editor interface. The title bar shows 'Survey Flow My Sample Project - Copy' and 'Zoom Out Zoom In' buttons. A checkbox for 'Show Flow IDs' is visible. The main area displays a list of survey blocks: 'Show Block: Demographics (5 Questions)' and 'Show Block: Default Question Block (1 Question)'. Each block has 'Add Below', 'Move', 'Duplicate', and 'Delete' buttons. Below the blocks is a yellow panel titled 'What do you want to add?' with a 'Cancel' button. This panel contains several buttons: 'Block', 'Branch', 'Embedded Data', 'Randomizer', 'Web Service', and 'Authenticator'. At the bottom of the panel are 'End of Survey' and 'Conjoint' buttons.

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.



The screenshot displays the 'Survey Flow' interface. It features a vertical list of survey blocks. The first block is 'Set Embedded Data:' with options for 'Unit' and 'Division', and a 'Move' button. The second block is 'Show Block: Introduction (4 Questions)' with a 'Move' button highlighted by a red box. Below this is a yellow 'What do you want to add?' dialog box with various block options like 'Block', 'Branch', 'Embedded Data', 'Randomizer', 'Web Service', 'Authenticator', 'End of Survey', and 'Conjoint'. The third block is 'Show Block: Skills (2 Questions)' with a 'Move' button.

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](#)

ED **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 [-](#) [+](#) 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 learning management system interface with several panels and a modal window. A red arrow points from the 'Question Randomization' modal to the 'Advanced Randomization' panel. Another red arrow points from the 'Set Up Advanced Randomization' link in the modal to the 'Advanced Randomization' panel. A third red arrow points from the 'Question Randomization' modal to the 'Randomize Questions' section on the right.

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.

Close

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 qualit
- 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

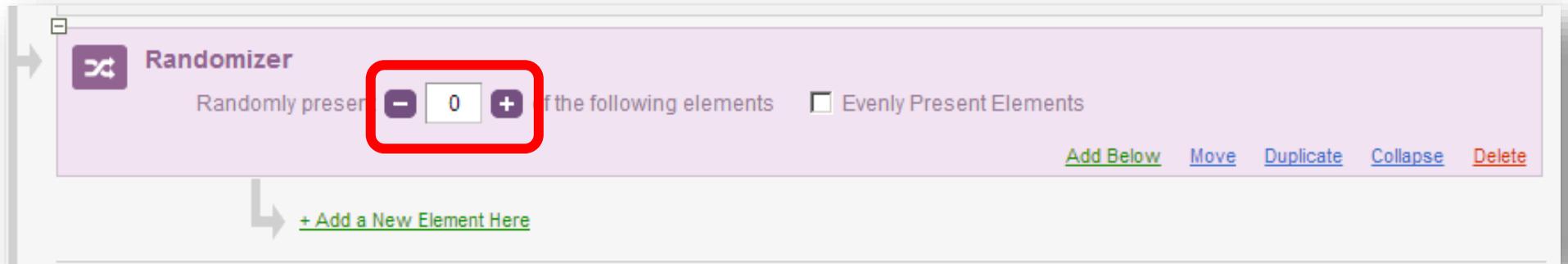
Undisplayed Items
Do not display the questions below:

-

Questions per Page
Show questions on each page.

Survey Flow Randomizer

Blocks within a survey

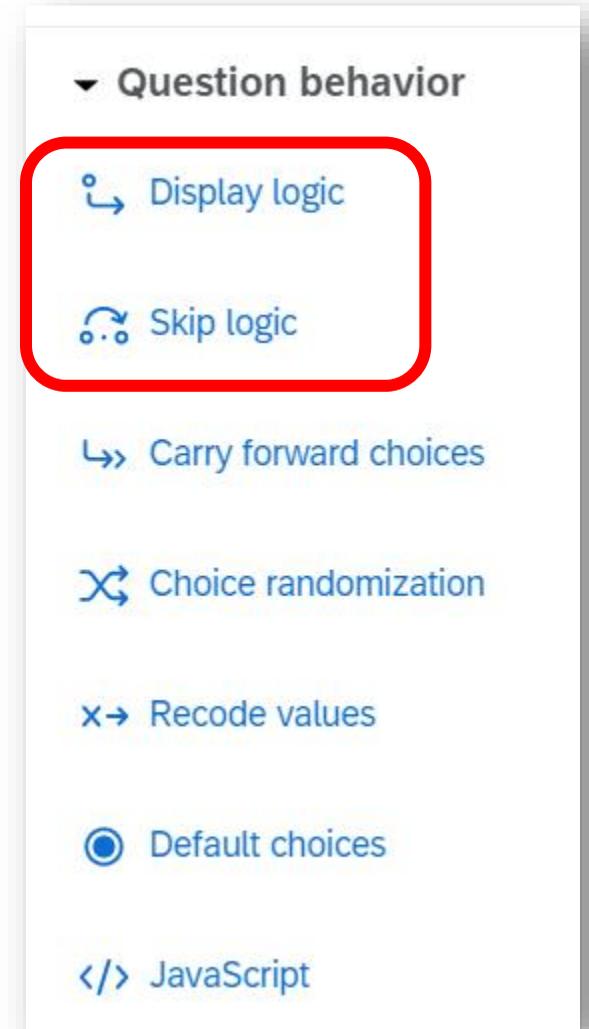


Randomly Order: Put all the blocks involved inside the randomizer, and set the number of blocks to present *equal* to the total number of blocks.

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

Display Logic (What is your status?)

Display this Question only if the following condition is met:

Question ▾ status What is your status? ▾ Graduate Student ▾ **Is Selected** ▾

- ✓ Is Selected
- Is Not Selected
- Is Displayed

In Page

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.

Display this question

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.

The screenshot displays two 'Then Branch If' elements in a survey flow. Each element has a blue header with a branch icon and the text 'Then Branch If:'. The first element's condition is 'If Did you attend workshop(s) from Data Services this semester? (e.g., NVivo, SPSS, Stata, etc.) Yes Is Selected'. Below the condition are links for 'Edit Condition', 'Move', 'Duplicate', 'Options', 'Collapse', and 'Delete'. A grey arrow points from the 'Move' link to a 'Show Block: Workshop Feedback (10 Questions)' element. The second element's condition is 'If Did you attend workshop(s) from Data Services this semester? (e.g., NVivo, SPSS, Stata, etc.) No Is Selected'. A grey arrow points from its 'Move' link to a 'Show Block: Didn't Go (2 Questions)' element. Both branch elements have '+ Add a New Element Here' links below them. The top right of the interface shows 'Add Below', 'Move', 'Duplicate', and 'Delete' links.

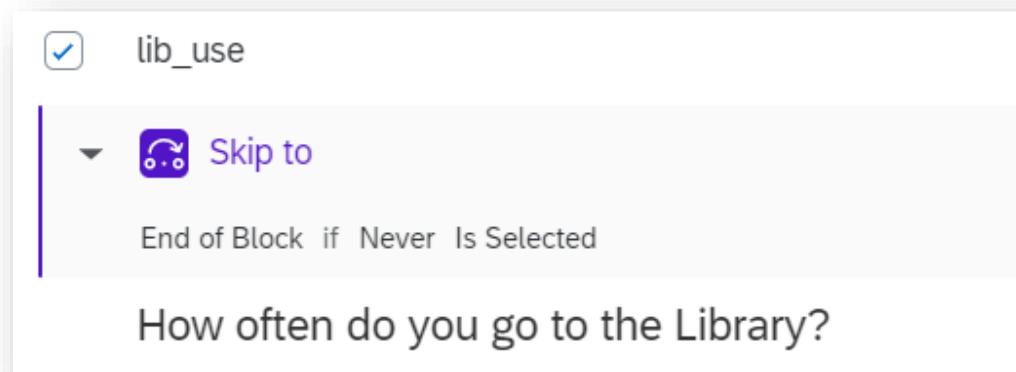
Skip Logic

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 shows two survey 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?' and features a 'Carry forward statements' dropdown menu. Below the dropdown, the text reads 'from Which of the following library services have yo... that are Selected Choices'. The rating table has columns for 'Not at all useful', 'Slightly useful', and 'Mode use'. The table rows are 'information desk', 'workshop', and 'individual consultation', each with a radio button in the 'Not at all useful' column. A red circle highlights the radio buttons in the first column of the table.

	Not at all useful	Slightly useful	Mode use
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

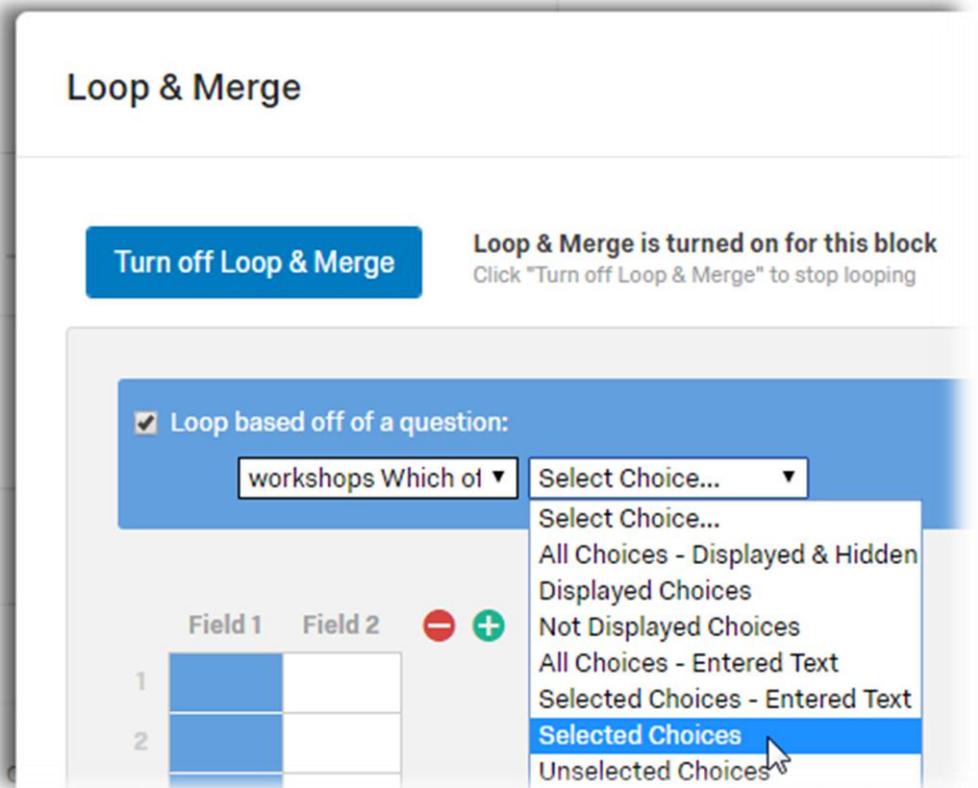
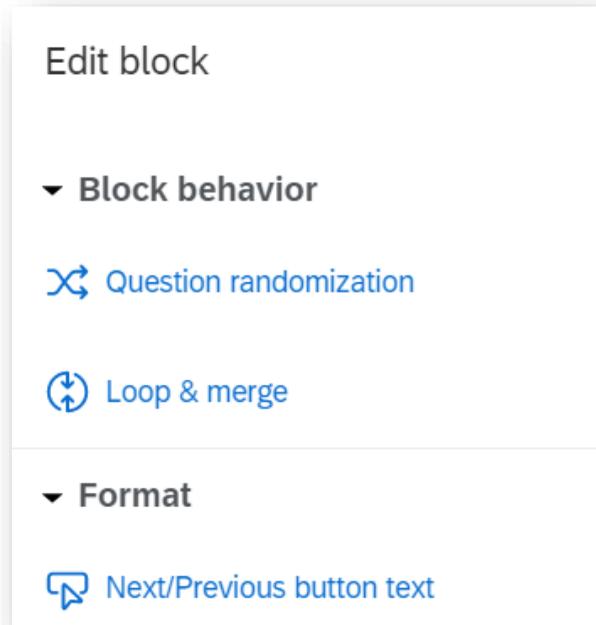
This avoids duplicating questions to see a surveys structure clearly and more easily make changes.

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

Loop based off of a question:

workshops Which of Selected Choices

	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		

Rich Content Editor

Piped Text...

What was your proficiency with the following software? (Please select one)

Basic Intermediate Expert

Survey Question

Embedded Data Field

GeolP Location

Survey Links

Date / Time

Opt Out Link

Random Number

Panels Field

Loop & Merge

Quota

Workshop Feedback

workshop

The **`\${lm://Field/1}`** Workshop

The following questions are about the **`\${lm://Field/1}`** workshop.

How would you rate your proficiency with **`\${lm://Field/2}`** before the workshop?

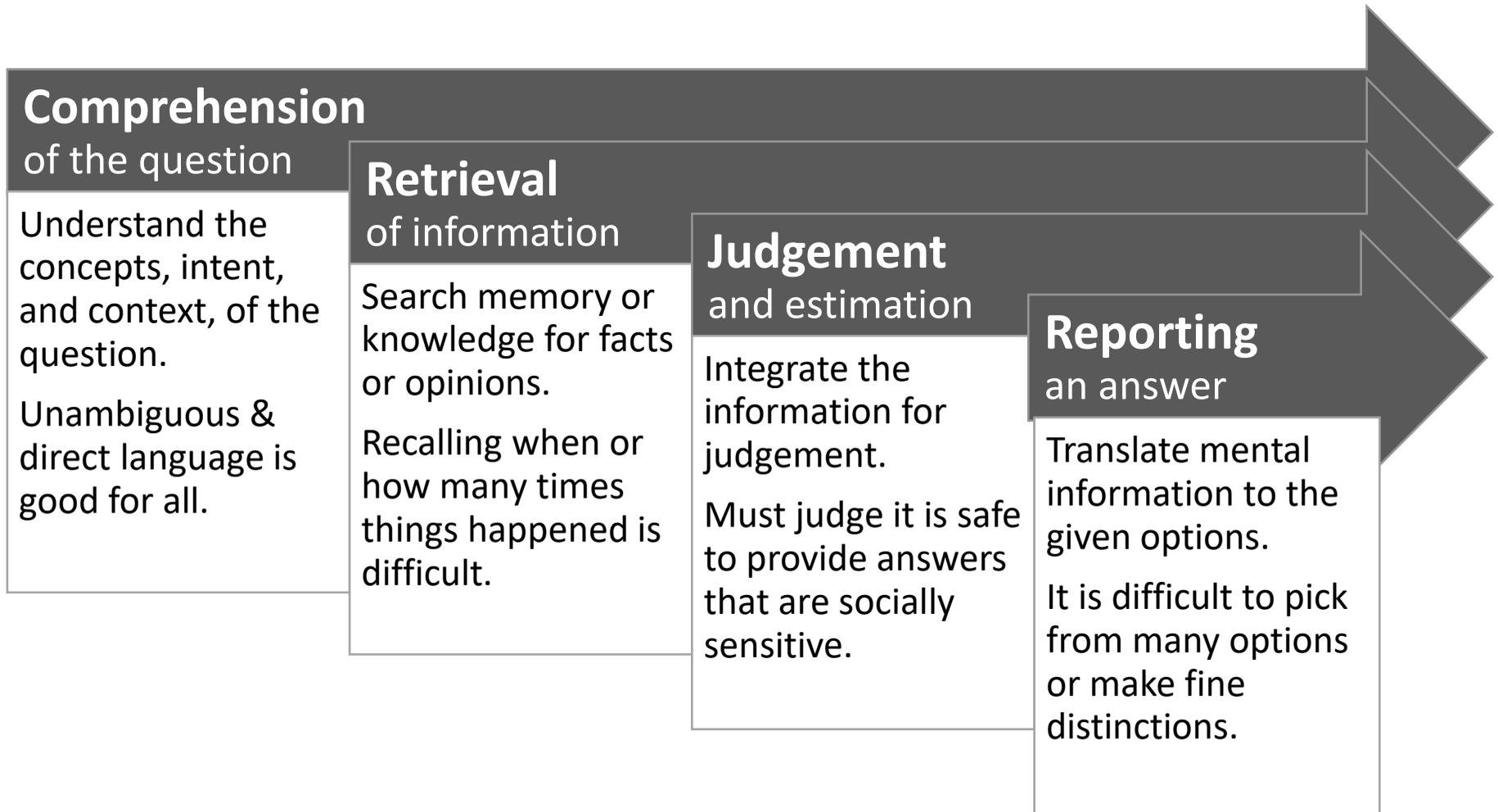
Intermediate

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

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

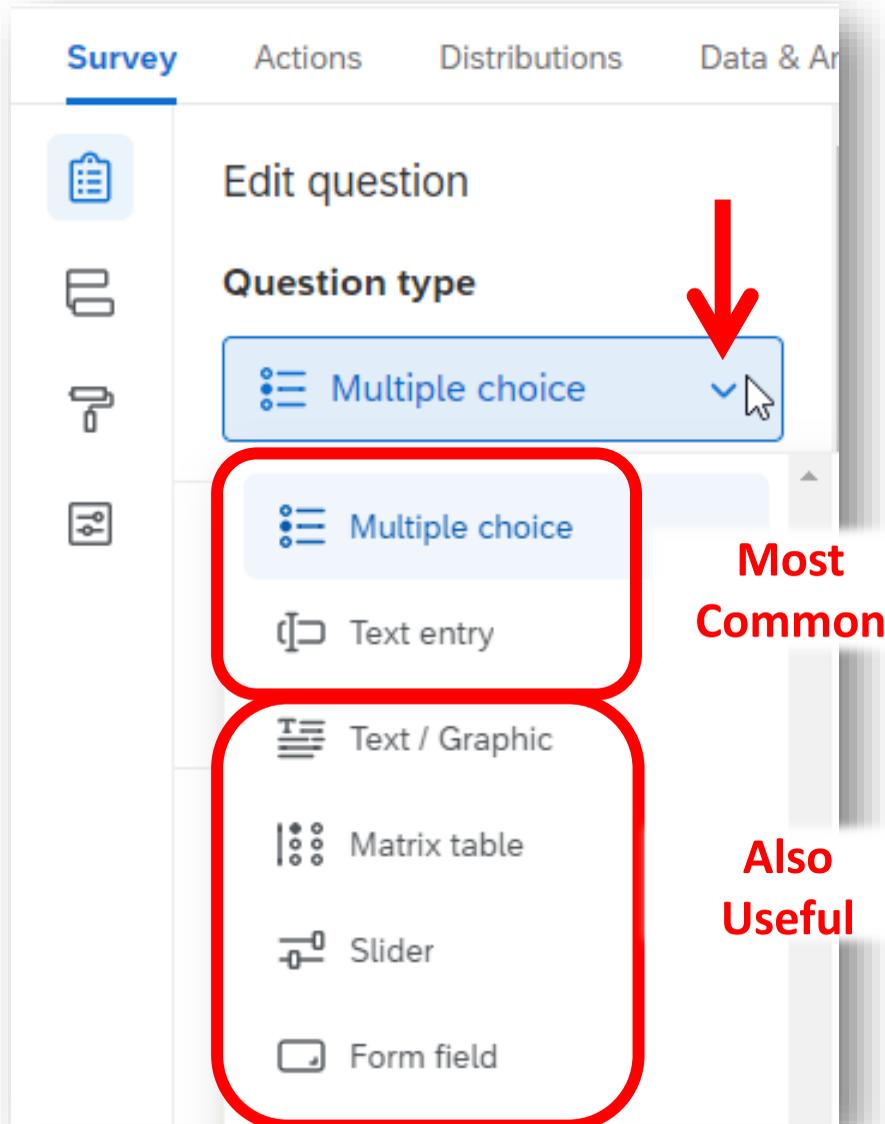
- **Easy** – Clear, one-topic question using simple words and grammar in which the respondent immediately recognizes the appropriate answer
 - **Impossible** - A question that either doesn't apply to the respondent, or doesn't have an appropriate answer choice. May prompt them to leave.
- **Note:** A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

- Rank order
- Side by side
- NPS Net promoter score

- Timing
- Graphic slider
- Constant sum
- Pick, group, and rank
- Drill down
- Heat map
- Hot spot
- Meta info
- Captcha verification
- File upload
- Signature
- Highlight
- Screen capture

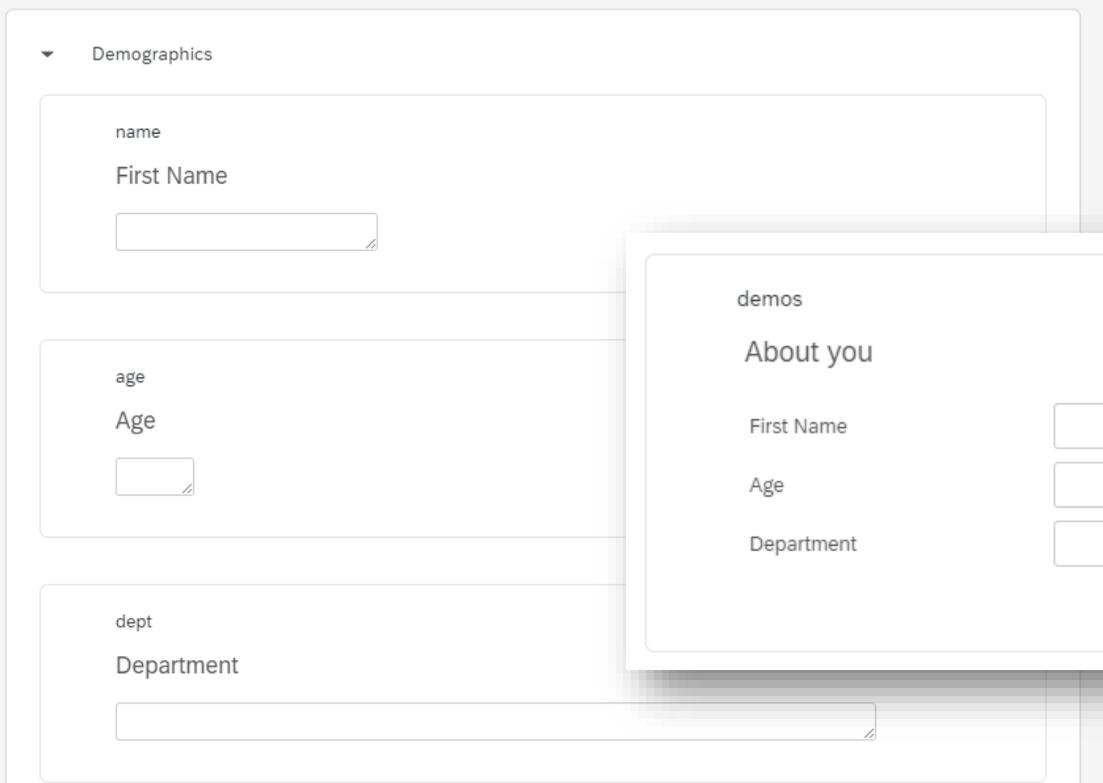
Standard Types

Text Entry & Form Field

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

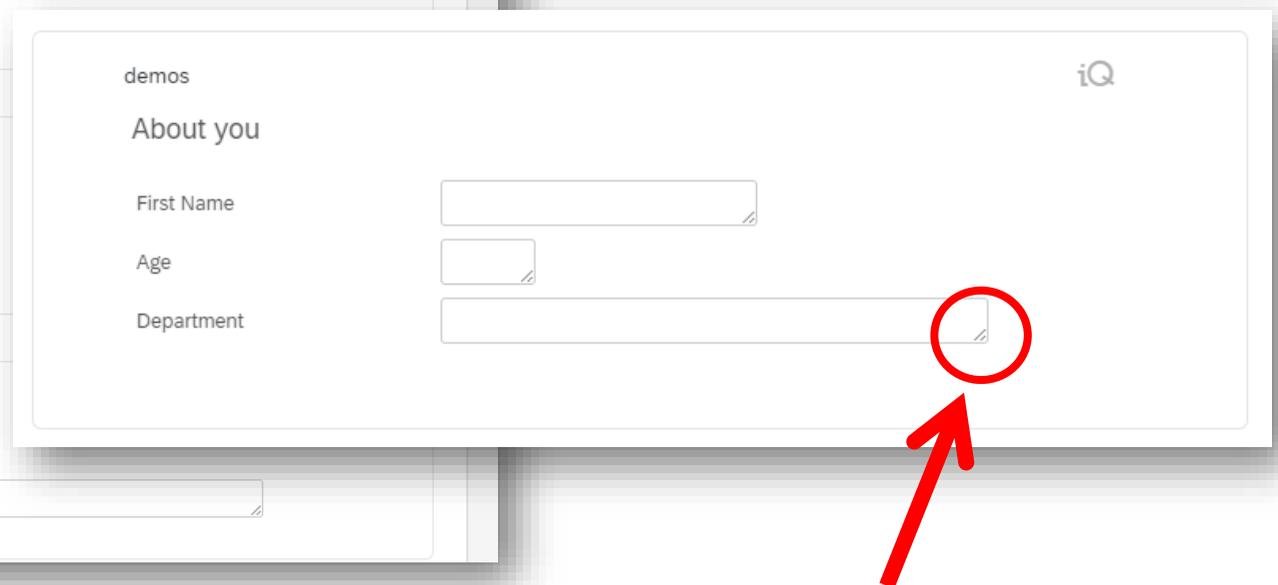
Form field allows you to fit several text-entry questions into a smaller space.

Three Text entry Questions



A screenshot of a survey form titled "Demographics" showing three separate text entry fields. The first field is labeled "name" with the sub-label "First Name" and a text input box. The second field is labeled "age" with the sub-label "Age" and a text input box. The third field is labeled "dept" with the sub-label "Department" and a text input box.

One Form field with 3 Fields



A screenshot of a survey form titled "demos" with the sub-label "About you" and the iQ logo. It contains three text entry fields: "First Name", "Age", and "Department". A red circle highlights the bottom right corner of the "Department" field, with a red arrow pointing to it, indicating that this corner can be used to adjust the field's length.

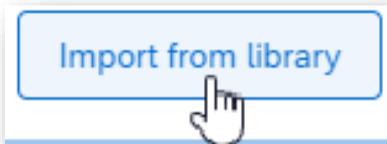
Click and drag on the bottom right corner of the field to **adjust the length** of each field to match the expected answers. This helps participants understand what you expect.

Date Picker

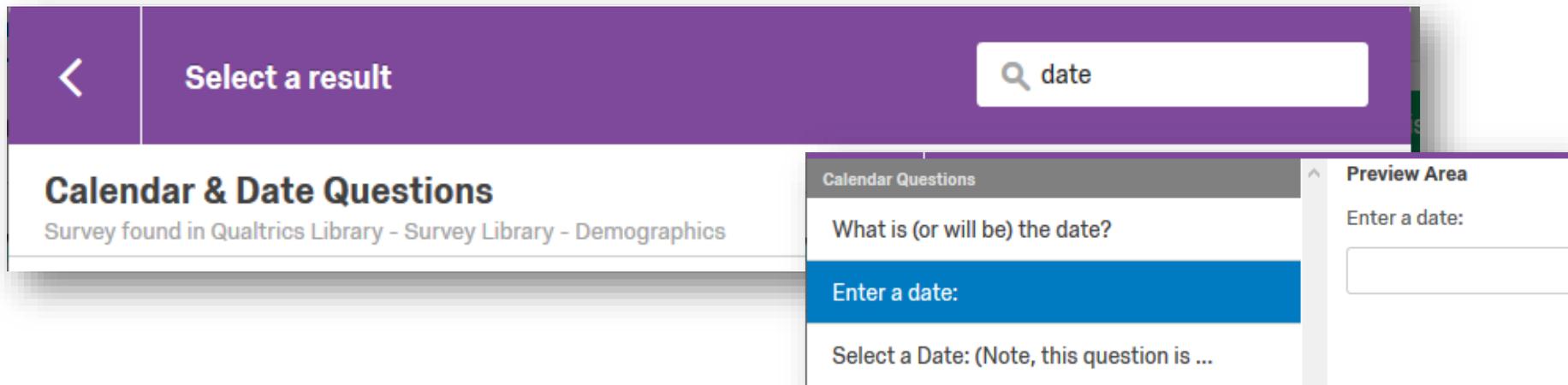
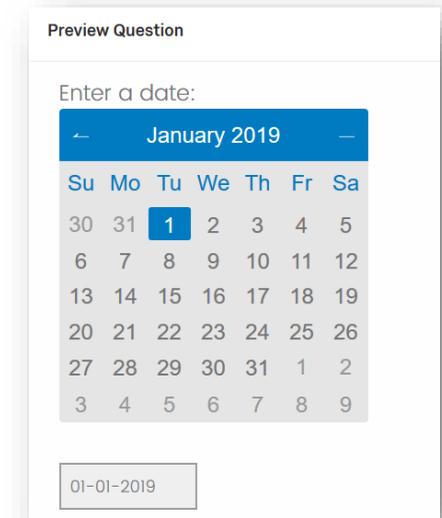
It is useful to assist participants when requesting a date.

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.



Multiple Choice

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

Choose all that apply:

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

Edit question

Question type

Answer type

- Allow one answer
- Allow multiple answers

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

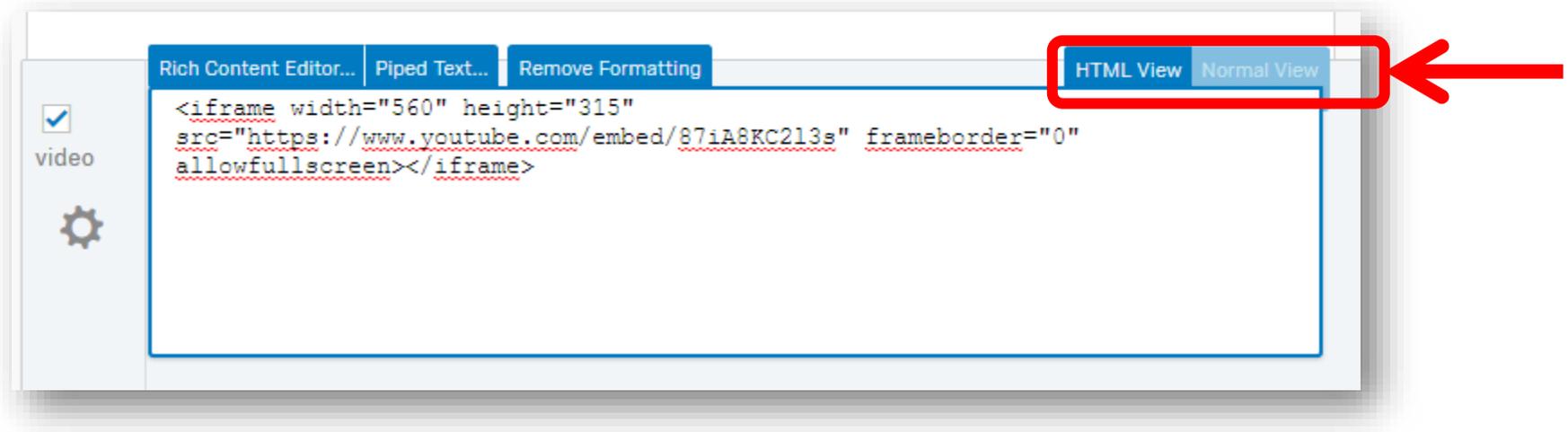
Media: Video & Embedded Content

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.

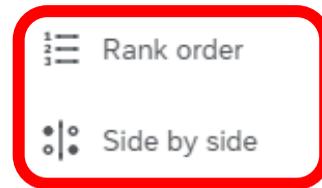
Side by Side

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



NPS Net promoter score

Timing

Graphic slider

Constant sum

Pick, group, and rank

Drill down

Heat map

Hot spot

Meta info

Captcha verification

File upload

Signature

Highlight

Screen capture

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.

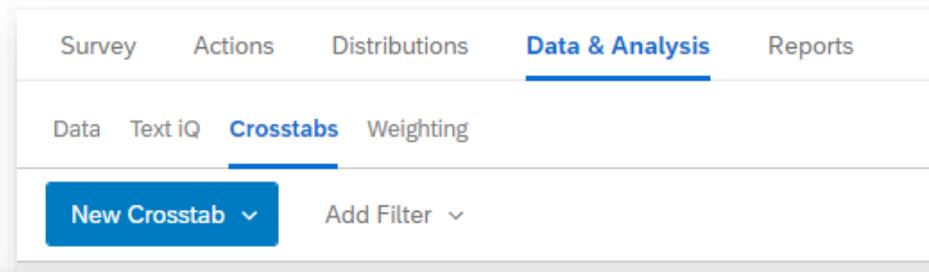
3. View the coding

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

The screenshot displays the Qualtrics Data & Analysis interface. At the top, the 'Data & Analysis' tab is selected. Below it, the question 'noise_c: Do you have any thoughts about...' is shown. A bar chart displays the most-used codes for this question. The codes and their counts are: 'All Responses' (100%), 'is low - happy' (7), 'too loud' (4), 'want quiet' (4), 'happy' (2), 'too quiet' (1), and 'wants s' (1). Below the bar chart, the 'want quiet' code is selected, and a search bar is visible. A red arrow points from the text 'You can add more than one code.' to the '+' button next to the 'want quiet' code in the coding table. The coding table shows the following responses and codes:

Response	Code	Action
I like low noise.	want quiet	+
There should be designated spaces that HAVE to be quiet.	want quiet	+
Depends where you make the study areas available, but would want desk space available in quiet areas	want quiet	+
I like quiet, but not silent.	want quiet	+

Crosstabulation



Variables Select All 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.

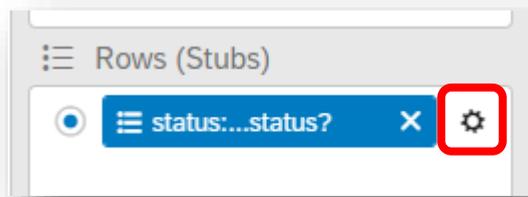
Put in **Column:** Independent, Treatment, or Grouping variable.

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

Crosstabs - Bucketing

You can merge categories in Rows to better see relationships.

Click the **Gear** icon:

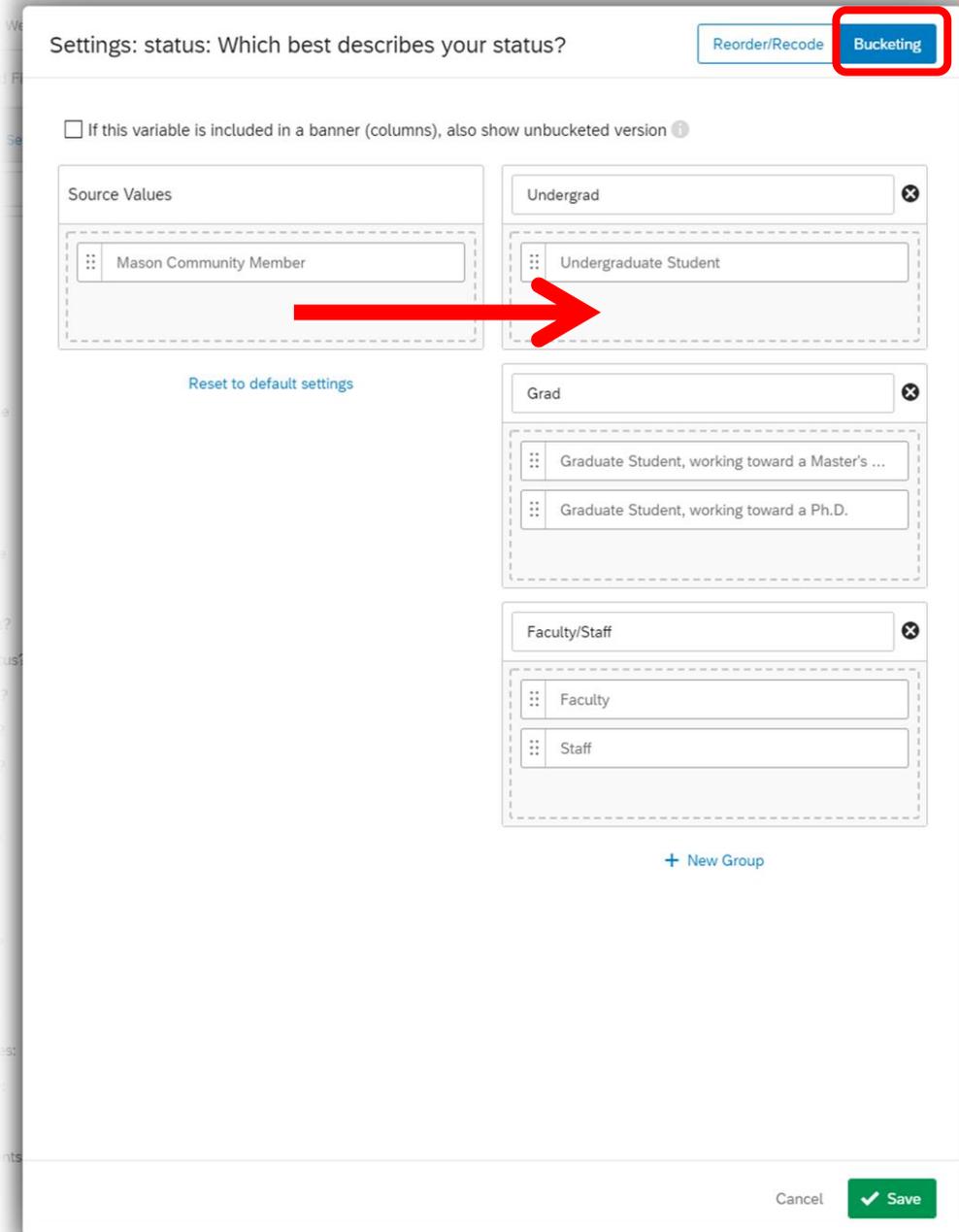


Choose **Bucketing** at the top right

Drag variables to group boxes

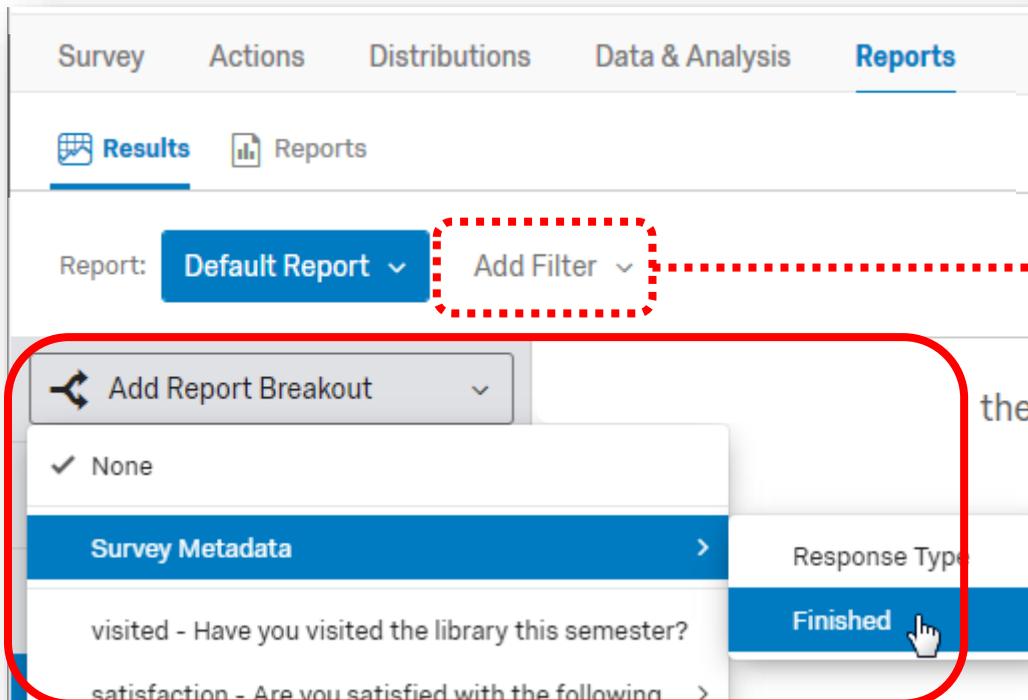
Label groups

Click **Save**

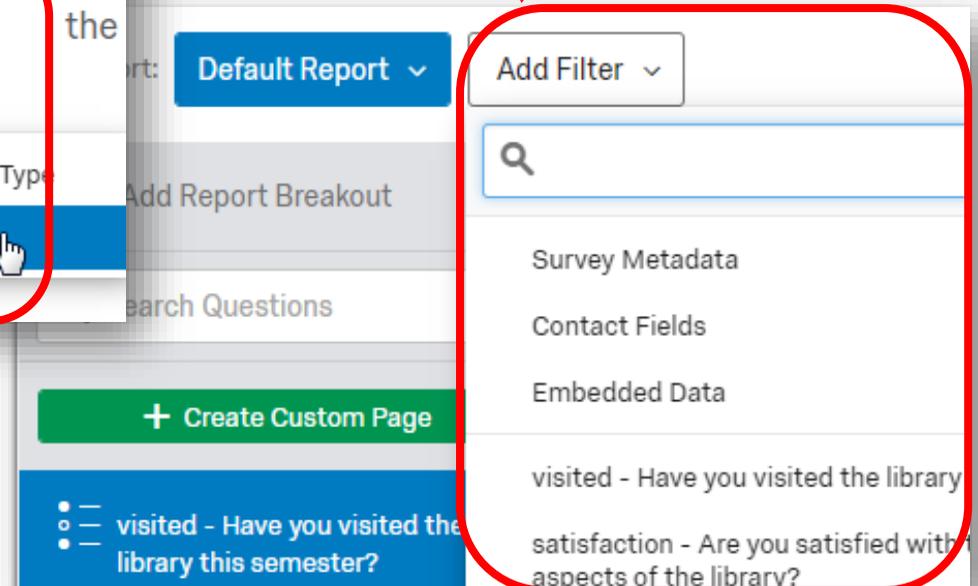


Qualtrics Tools - Reports

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 Data & Analysis interface. The 'Data & Analysis' tab is highlighted with a red box. Below it, the 'Export & Import' dropdown menu is open, and the 'Export Data...' option is highlighted with a red box and a hand cursor. The interface also shows a table of survey data with columns for 'Recorded Date', 'lib_use - How often do you go to the Library?', and 'services_'. The table has 4 rows of data, with the first row showing 'Rarely' and the others showing 'Sometimes'.

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

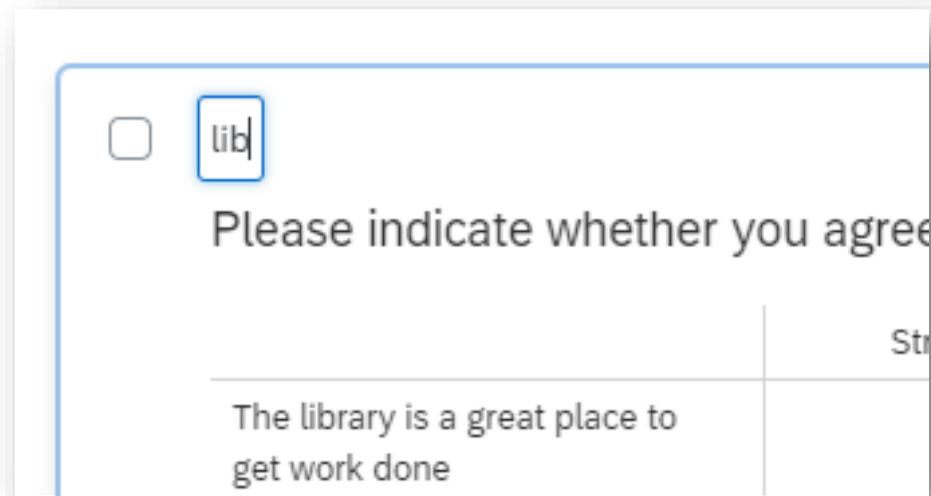
The word that appears in the upper left of each question is the “Export Tag”, which serves the same function as a variable name.

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. At the top left, there is a small square icon followed by the text 'lib' inside a blue-bordered box. Below this, the text reads 'Please indicate whether you agree'. To the right, the word 'Str' is partially visible. A horizontal line separates the header from the question text, which reads 'The library is a great place to get work done'.

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:

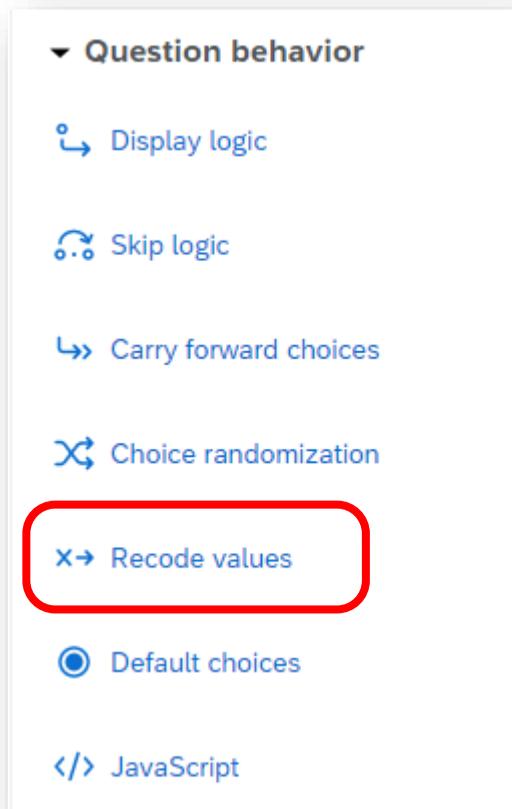
satisfaction_1	satisfaction_2	satisfaction_3
?-Study Areas	?-Research Assi	?-Availability of

The screenshot shows the Qualtrics question editor interface. At the top, there are tabs for 'Rich Content Editor...', 'Piped Text...', 'HTML View', and 'Normal View'. The question text is 'Are you satisfied with the following aspects of the library?'. Below the question text, there is a red box around the 'Edit Question Label: ?' field. To the right of this field is a 'Reset Label' button. Below the question text, there is a matrix question with five columns: 'Very satisfied', 'satisfied', 'Neutral', 'dissatisfied', and 'dissatisfied'. The rows are 'Study Areas', 'Research Assistance', and 'Availability of Materials'. Each cell in the matrix contains a radio button.

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 'Recode Values' dialog box. It has two checked checkboxes: 'Recode Values' and 'Variable Naming'. Below these are five rows of input fields. The first two columns are labeled 'Value' and 'Value Label' in red. The rows are: 1 (UG), 2 (Grad), 3 (Faculty), 4 (Staff), and 5 (Other). The right side of the dialog shows the corresponding labels: Undergraduate Student, Graduate Student, Faculty, Staff, and Other. A 'Close' button is in the bottom right corner.

Value	Value Label	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.

The image displays two screenshots of the 'Recode Values' configuration interface in Qualtrics. The left screenshot shows the default configuration with three columns for values 1, 2, and 3, corresponding to labels 'Very satisfied' and variable names 'satisfied_1', 'satisfied_2', and 'satisfied_3'. The right screenshot shows a custom configuration with three columns for values 2, 1, and 0, corresponding to labels 'Very satisfied', 'Somewhat satisfied', and 'Neutral', and variable names 'sat_study', 'sat_assist', and 'sat_avail'. Red boxes and arrows highlight the 'sat_assist' variable name and the '0' value, illustrating how to change the coding and variable names.

Value	Value Label	Variable Name
1	Very satisfied	satisfied_1
2	Very satisfied	sat_study
1	Somewhat satisfied	sat_assist
0	Neutral	sat_avail

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

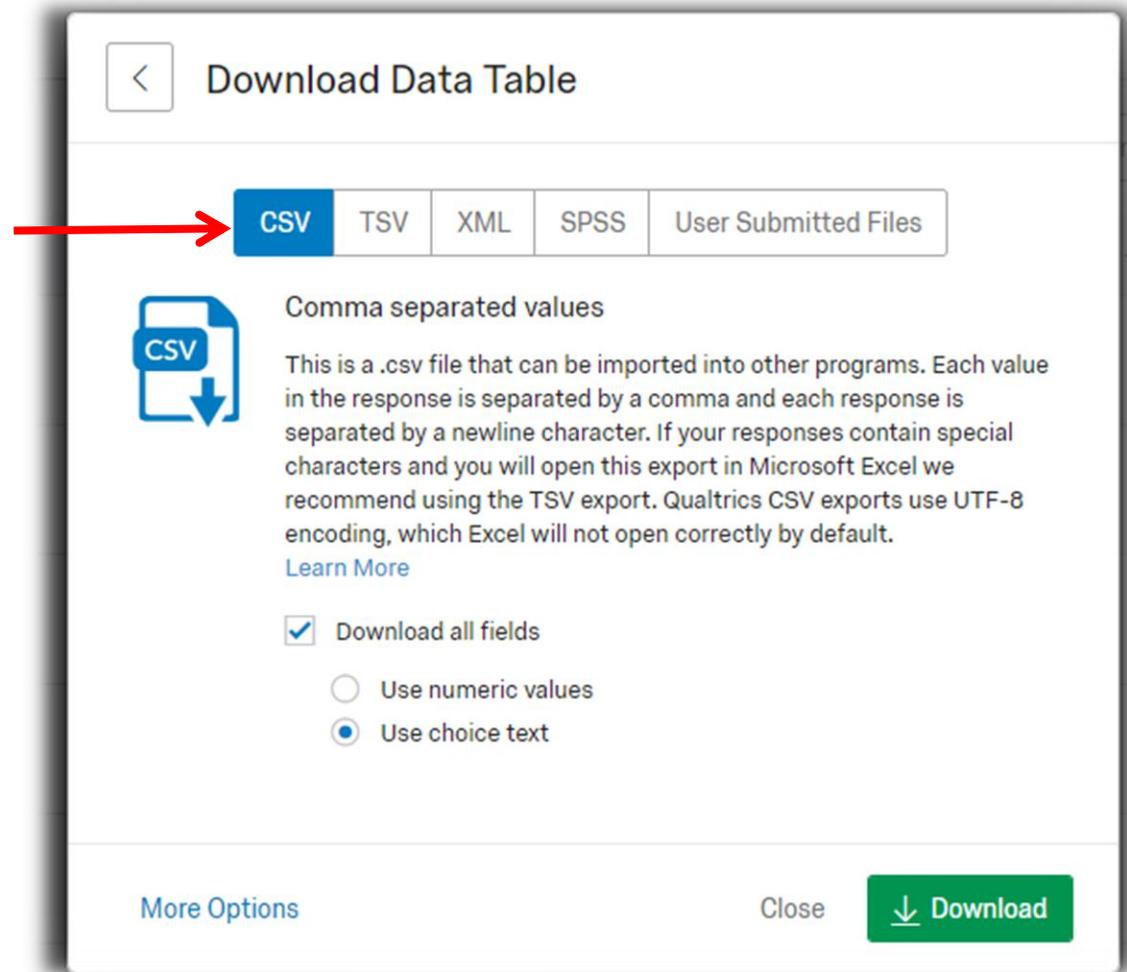
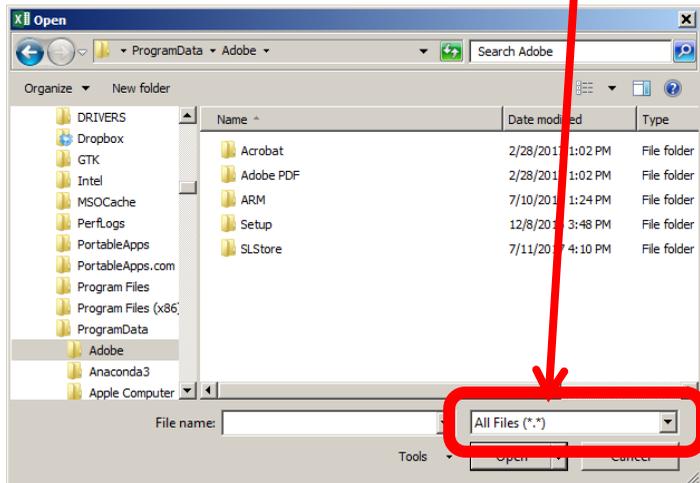
For Excel

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 

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.

The screenshot shows the 'Download a data table' interface. At the top, there are tabs for CSV, TSV, Excel, XML, **SPSS** (highlighted), Google Drive, and User-submitted files. Below the tabs is a section for 'Statistical Analysis Package' with an SPSS icon and a description: '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](#)'. There is a checked checkbox for 'Download all fields'. Below this is a 'String Width' dropdown set to 'Medium - 2,000'. A list of options follows, with two red arrows pointing to them: 'Recode seen but unanswered questions as -99' and 'Export viewing order data for randomized surveys'. At the bottom, there are links for 'SPSS Syntax File' and 'Corresponding Data'. A red box highlights the 'Fewer Options' button, and a blue 'Download' button is at the bottom right.

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](#)

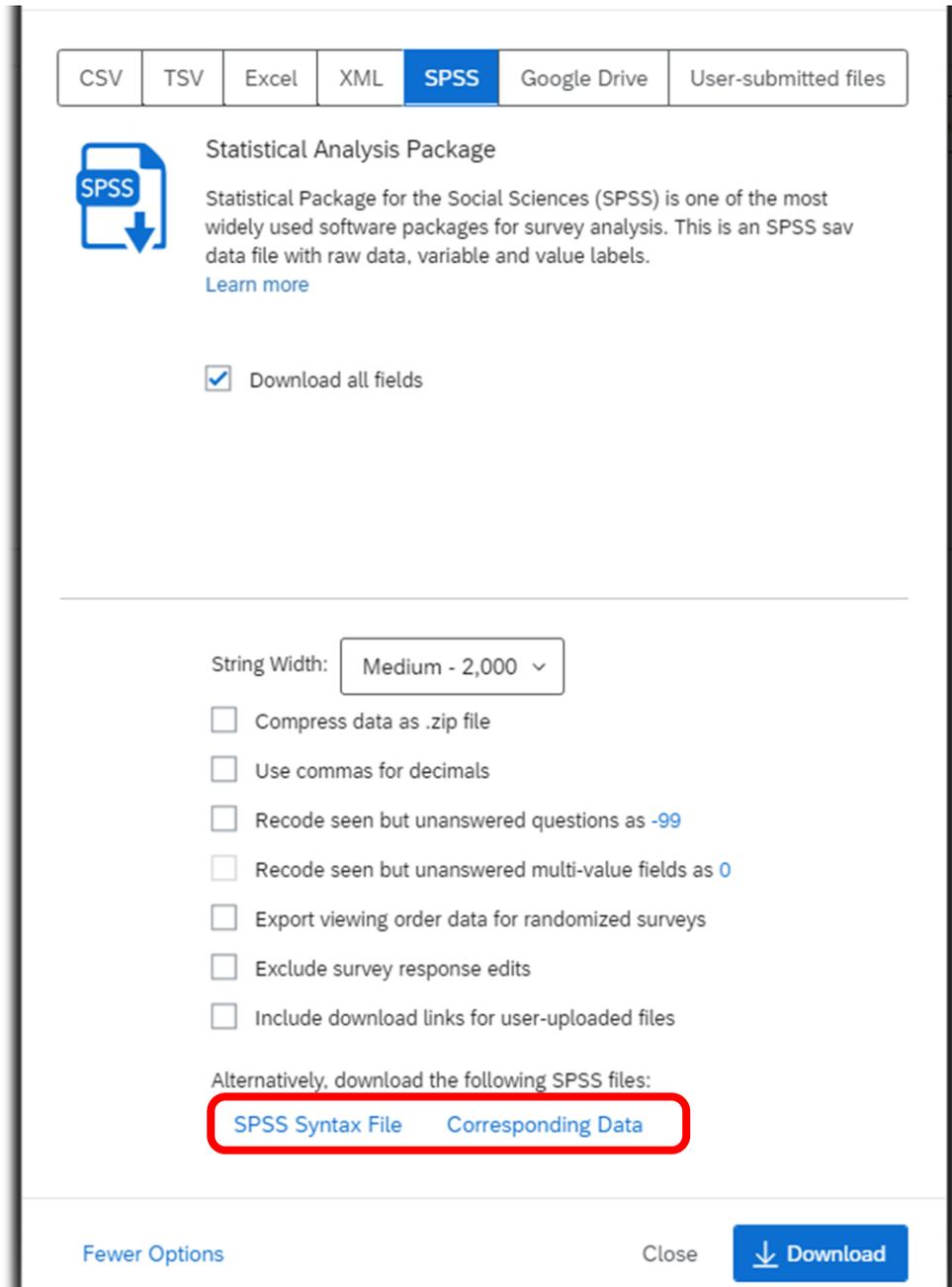
For other Statistical Software

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.



The screenshot shows a web interface for downloading an SPSS file. At the top, there is a navigation bar with tabs for CSV, TSV, Excel, XML, SPSS (selected), Google Drive, and User-submitted files. Below this, there is a section titled "Statistical Analysis Package" with an SPSS icon and a description: "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." A "Learn more" link is provided. A checkbox labeled "Download all fields" is checked. Below this, there is a "String Width" dropdown menu set to "Medium - 2,000". A list of options follows, each with an unchecked checkbox: "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", and "Include download links for user-uploaded files". At the bottom, there is a section titled "Alternatively, download the following SPSS files:" with two links: "SPSS Syntax File" and "Corresponding Data", both of which are highlighted with a red box. At the very bottom, there are links for "Fewer Options", "Close", and a blue "Download" button with a download icon.

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.

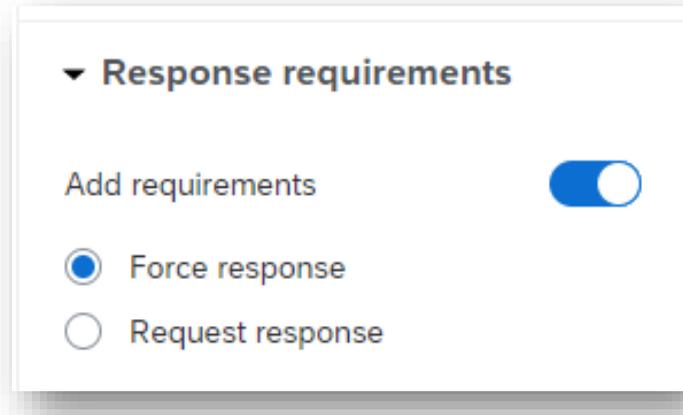
Be sure to think though what would be valid.

- 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 image shows a screenshot of the Qualtrics survey editor interface. The main panel displays the 'Response requirements' section, which is expanded to show 'Add requirements' (disabled) and 'Add validation' (enabled). Below this, the 'Content type' dropdown menu is open, showing options like 'Email address', 'Phone number', 'US state', 'Postal code', 'Date format', 'Number', and 'Text only'. A red arrow points to the 'Content type' dropdown. A hand cursor is visible over the 'Email address' option. A secondary panel on the right shows the 'Add validation' settings for the selected 'Email address' content type, including 'Add validation' (enabled), 'Content type' (set to 'Email address'), 'Minimum', 'Maximum', and 'Maximum decimals' input fields.

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

* ↻ x→ (x)

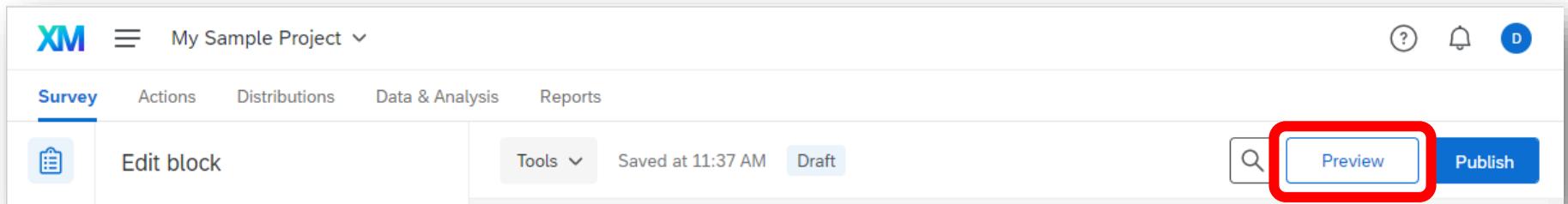
Recoded Values

Recode Values

Variable Naming

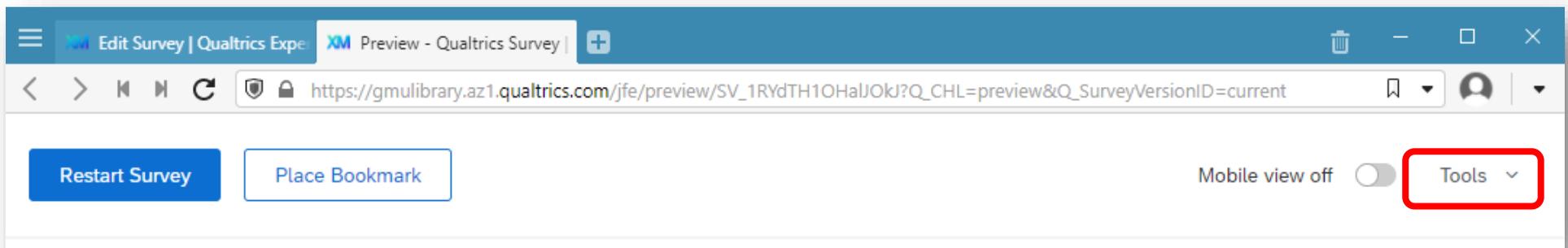
1	Visited	Yes, I have
0	Didn't	No, I have not

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.



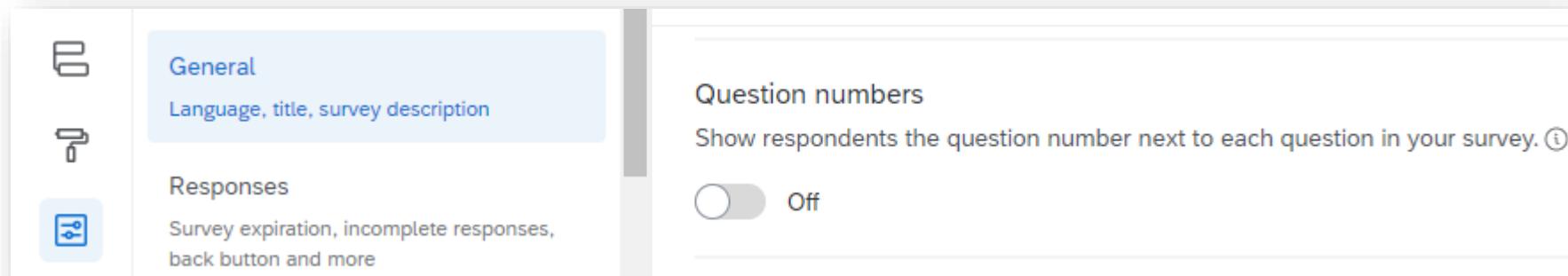
Expert Review

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:



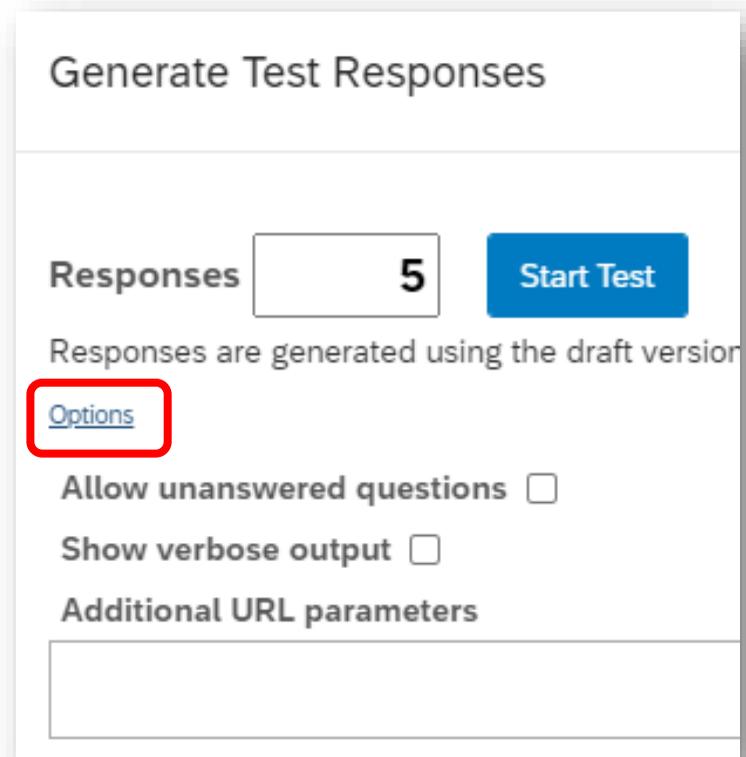
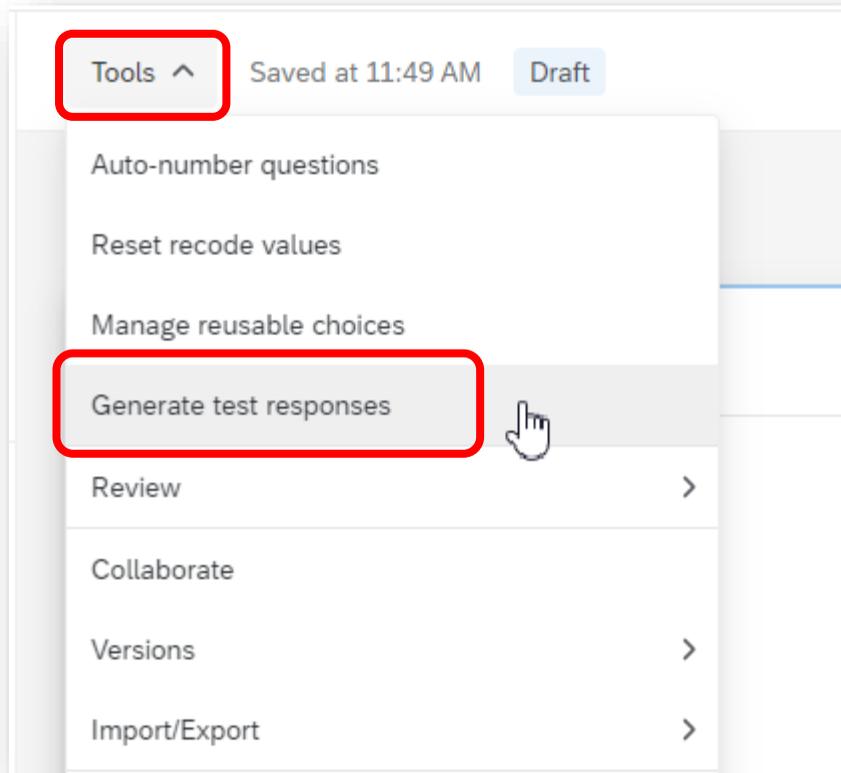
- **Export Survey to Word** (in Tools); it shows technical info better than “Print Survey”
- Send them a “real” survey link as if they were a participant. It is useful to enable “[Question Numbers](#)” in Survey Options during this testing period so you can more easily discuss particular questions (don’t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



Testing Logic

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

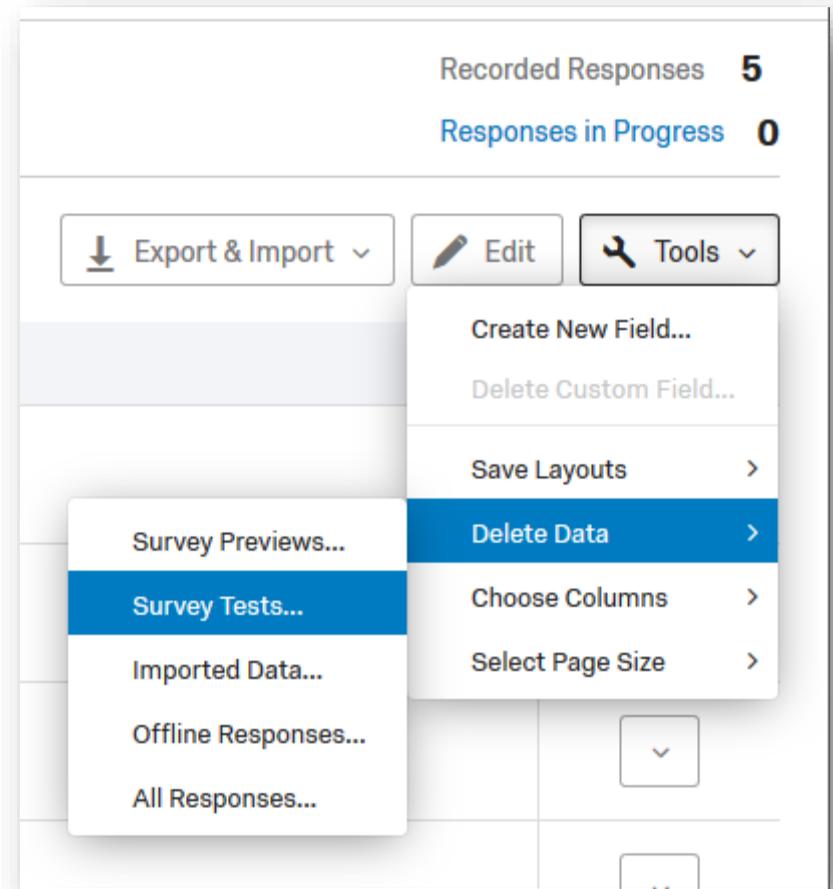
It will help you check that it is working as planned by having a computer complete the survey. It will give random responses and then act accordingly. For instance, if a particular answer means to skip over a question, the computer will skip that question.



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:

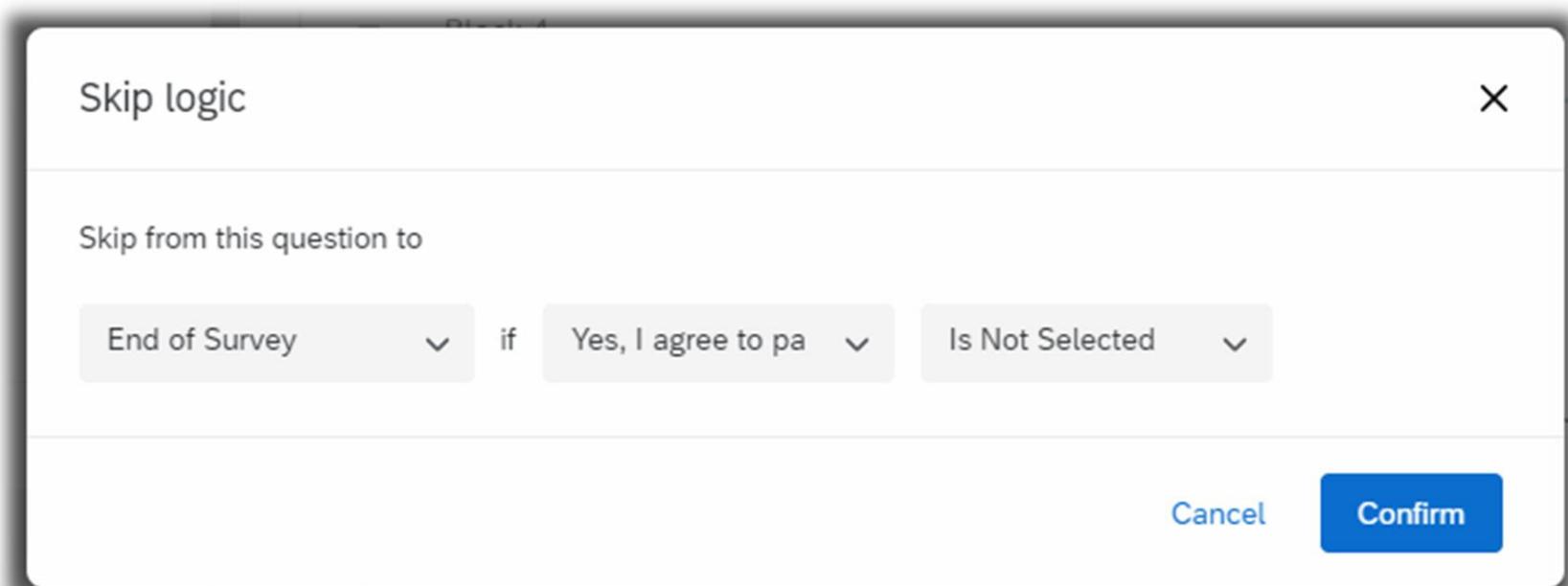
- **Qualtrics.** You can link to their security statement and quote a relevant section, like "Qualtrics safeguards all customer data, and uses secure data centers to ensure the highest protection as per HITECH requirements."
<https://www.qualtrics.com/security-statement/>
- **Your computer.** Downloaded 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.

<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



The image shows a 'Skip logic' configuration window. The title bar reads 'Skip logic' with a close button (X) in the top right corner. Below the title bar, the text 'Skip from this question to' is followed by three dropdown menus: 'End of Survey', 'if', 'Yes, I agree to pa', and 'Is Not Selected'. The 'if' dropdown is partially obscured by the 'Yes, I agree to pa' dropdown. At the bottom right, there are two buttons: 'Cancel' and '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. The main heading asks 'How do you want to distribute your survey?'. There are three main distribution methods: Email, Web, and Social. The Social method is highlighted with a red box and labeled 'Anonymous Data'. Below the Social method, there are two options: 'Use your own email system' and 'Generate a trackable link for each contact'. The Email method is labeled 'Identifiable Data' and has a 'Compose Email' button. The Web method is also labeled 'Identifiable Data'. The Social method is labeled 'Anonymous Data' and has two options: '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.

Anonymous Data

- Anonymous Link
- Emails
- Personal Links
- Social Media
- Offline App
- QR Code
- Purchase Respondents

Identifiable Data

Costs money, ask your admin

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

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

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:

Authenticate Using Contact

Authentication Fields

Password Prefill

Please log in.

Please enter your email:

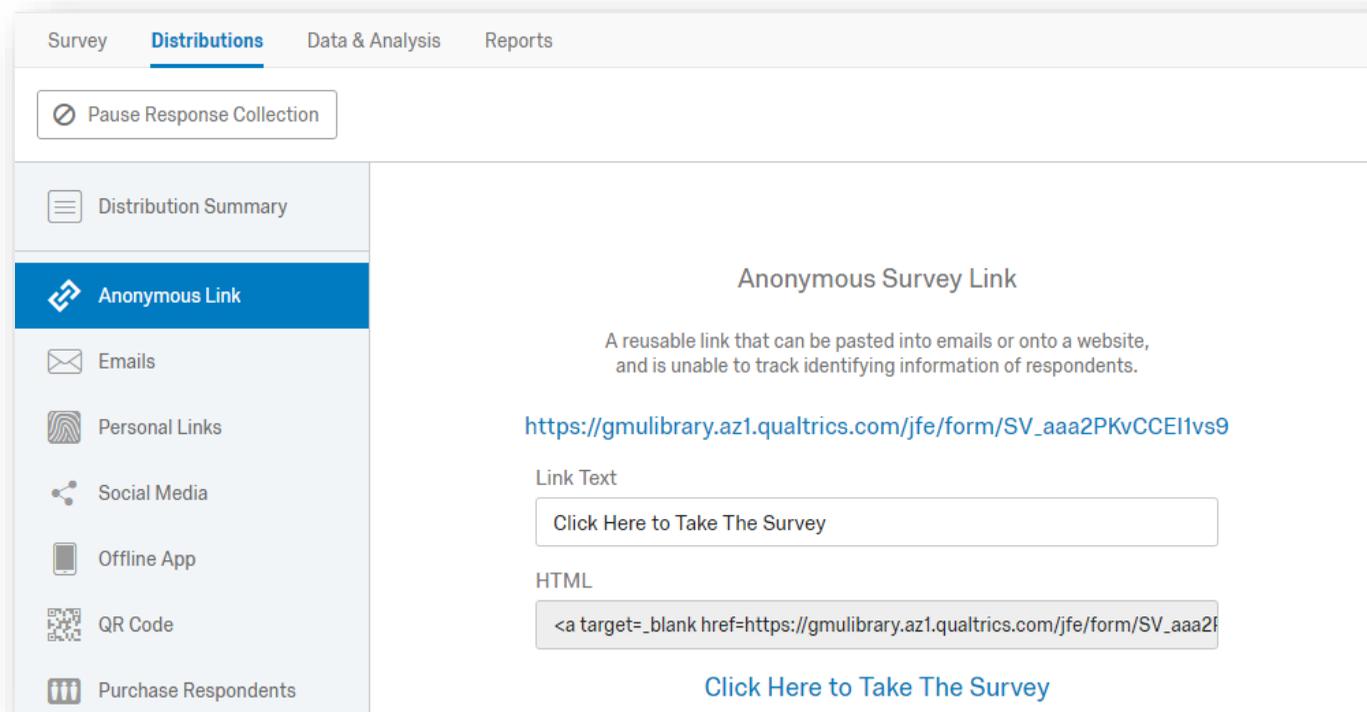
Next >>

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 generating an anonymous survey link. The top navigation bar includes 'Survey', 'Distributions' (selected), 'Data & Analysis', and 'Reports'. Below the navigation is a 'Pause Response Collection' button. The left sidebar contains a menu with options: 'Distribution Summary', 'Anonymous Link' (highlighted), 'Emails', 'Personal Links', 'Social Media', 'Offline App', 'QR Code', and 'Purchase Respondents'. The main content area is titled 'Anonymous Survey Link' and contains the following text: 'A reusable link that can be pasted into emails or onto a website, and is unable to track identifying information of respondents.' Below this is the URL: https://gmulibrary.az1.qualtrics.com/jfe/form/SV_aaa2PKvCCEI1vs9. There are two input fields: 'Link Text' with the value 'Click Here to Take The Survey' and 'HTML' with the value '<a target=_blank href=https://gmulibrary.az1.qualtrics.com/jfe/form/SV_aaa2f'. At the bottom, there is a blue button labeled 'Click Here to Take The Survey'.

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

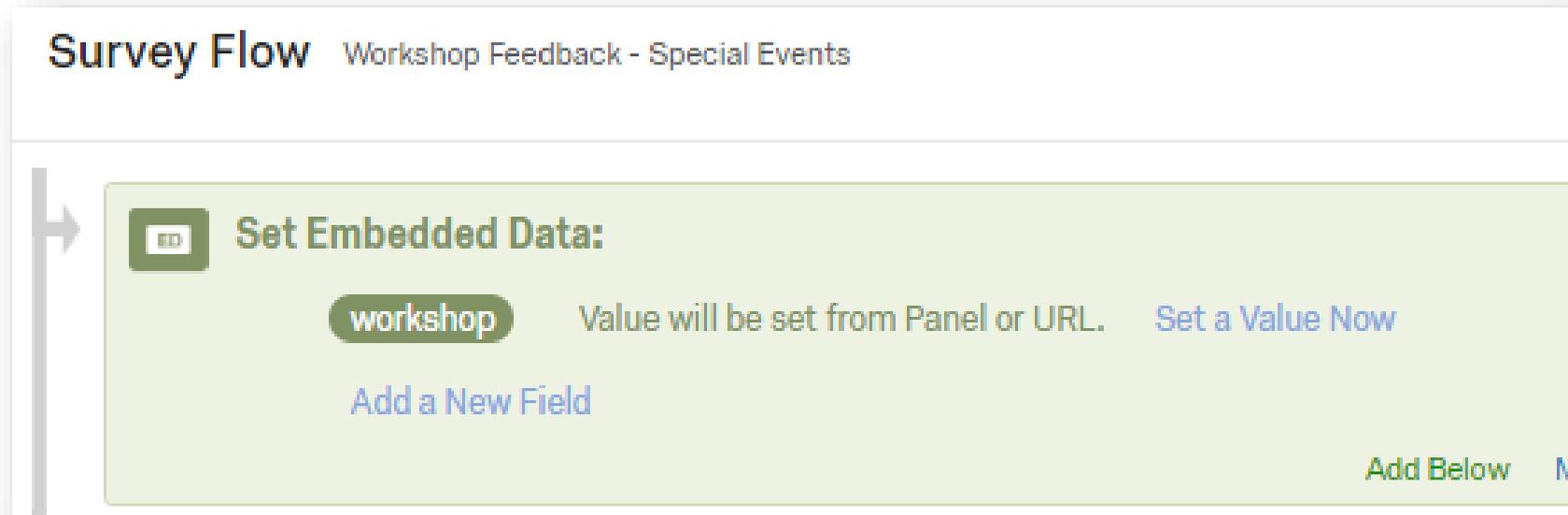
Embedded Data

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

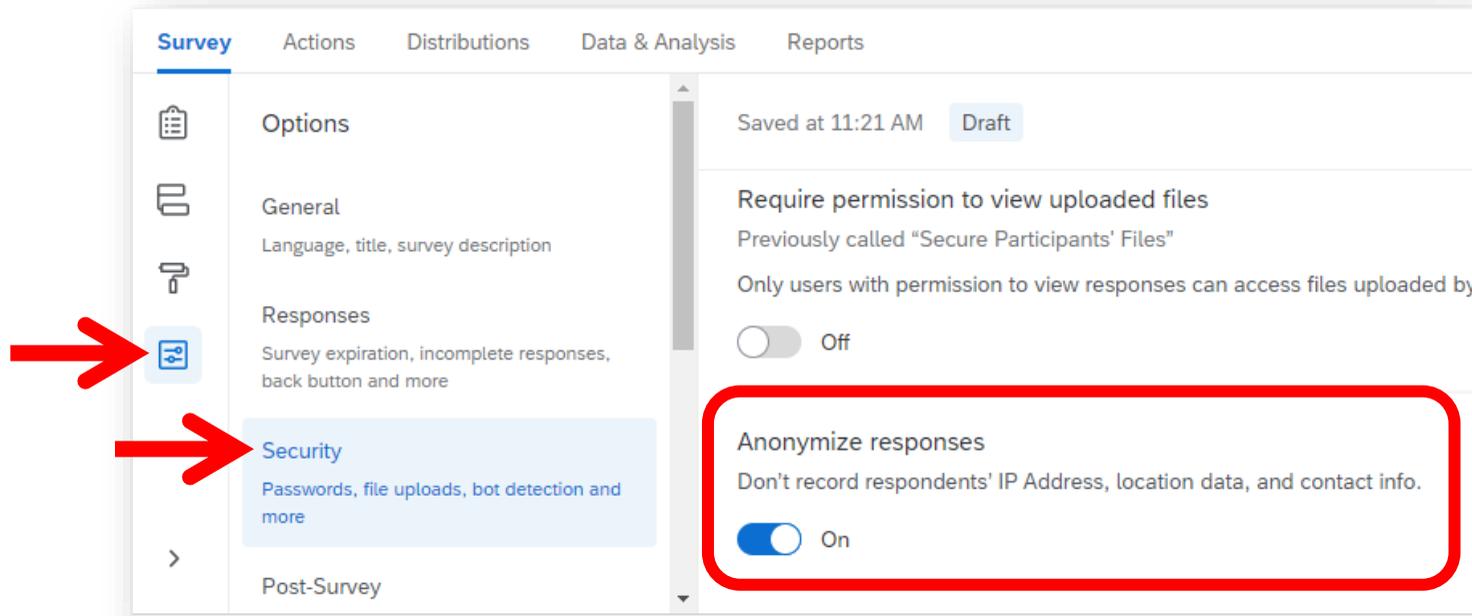
In **Survey Flow**, you must have Qualtrics save this information as a variable with **Set Embedded Data**. Do NOT use this method to track individuals, that is personal links.



<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

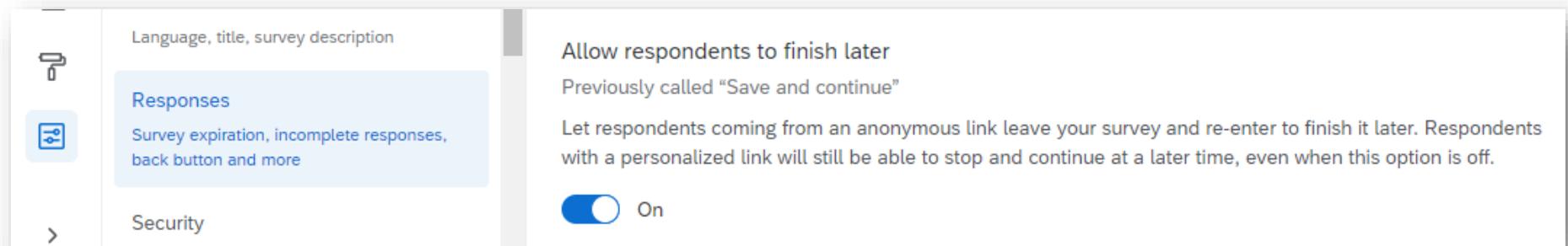
Especially if your survey is long, people may want or need to stop and resume later.

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 'Survey Options' configuration page. On the left is a navigation menu with four items: 'General' (Language, title, survey description), 'Responses' (Survey expiration, incomplete responses, back button and more), 'Security' (Passwords, file uploads, bot detection and more), and 'Post-Survey' (Thank you emails, completed survey). The 'Responses' item is selected and highlighted in light 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. More', and 'What should be done with incomplete survey responses?'. Under this question, there are two radio button options: 'Record' (which is selected) and 'Delete'. Below this, there is a question 'How much time should pass before they're considered incomplete?' with a dropdown menu currently set to '1 Week'.

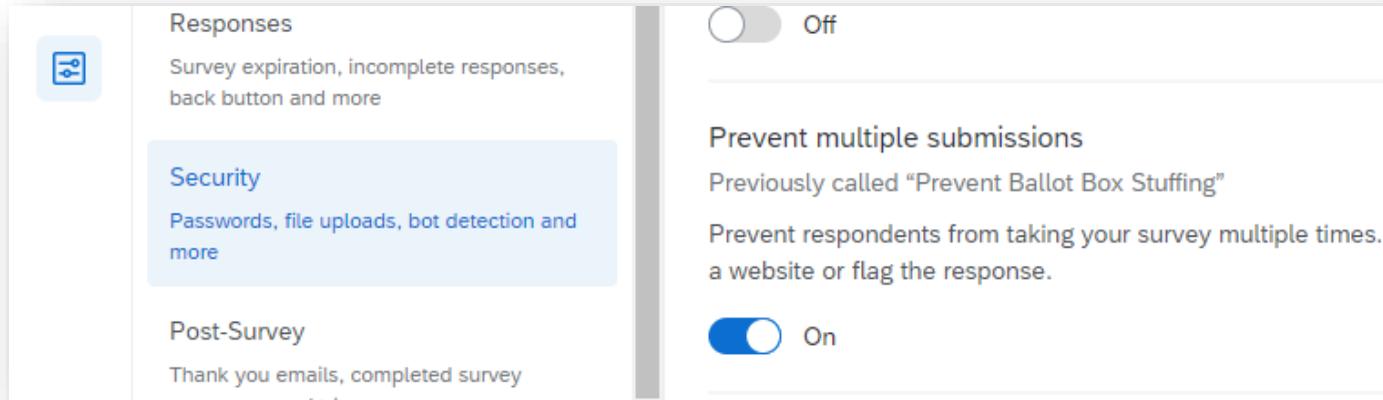
Set when they get transferred to “Recorded Responses” in **Survey Options**.

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.

<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>

Created by:

Debby Kermer

dkermer@gmu.edu

Digital Scholarship Center

George Mason University

<https://dsc.gmu.edu>