
Experiments With Qualtrics

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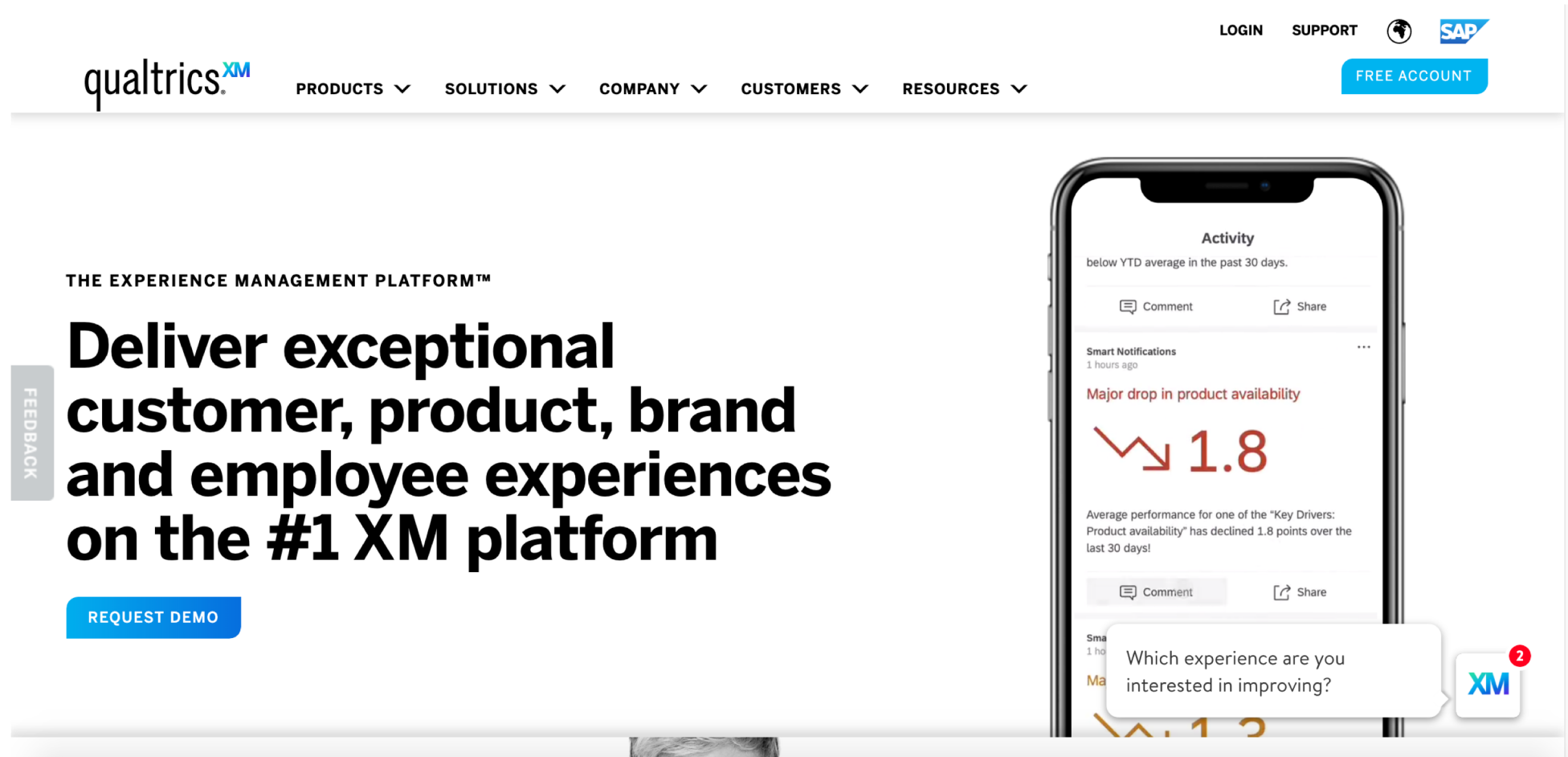
<https://celss.iserp.columbia.edu/>

April 2020

Today's Goals

- Learn about Qualtrics
- Establish a fundamental understanding so that building your experiment is the easy part
- Get an understanding for what is possible in Qualtrics in order to know what to ask and where to look



Qualtrics – What is It?



The image shows a screenshot of the Qualtrics website homepage. The header features the Qualtrics logo, navigation links for PRODUCTS, SOLUTIONS, COMPANY, CUSTOMERS, and RESOURCES, and links for LOGIN, SUPPORT, and a FREE ACCOUNT button. The main content area includes the text 'THE EXPERIENCE MANAGEMENT PLATFORM™' and a large headline: 'Deliver exceptional customer, product, brand and employee experiences on the #1 XM platform'. A 'REQUEST DEMO' button is located below the headline. To the right, a smartphone displays a mobile app interface with an 'Activity' section showing a 'Major drop in product availability' with a red line graph and the number '1.8'. A chat bubble at the bottom right of the phone asks, 'Which experience are you interested in improving?' and features a '2' badge and the XM logo.

qualtrics.^{XM}

PRODUCTS ▾ SOLUTIONS ▾ COMPANY ▾ CUSTOMERS ▾ RESOURCES ▾

LOGIN SUPPORT  

FREE ACCOUNT

THE EXPERIENCE MANAGEMENT PLATFORM™

Deliver exceptional customer, product, brand and employee experiences on the #1 XM platform

REQUEST DEMO

Activity

below YTD average in the past 30 days.

Comment Share

Smart Notifications
1 hours ago

Major drop in product availability

1.8

Average performance for one of the "Key Drivers:
Product availability" has declined 1.8 points over the last 30 days!

Comment Share

Which experience are you interested in improving?

2

XM


Qualtrics – What is It?


- Survey Tool
- More features/customizable than Survey Monkey, Google Forms
 - Timing Questions/Clicks
 - Embedded/Piped Data
 - Dynamic (Randomization, JavaScript)

Qualtrics – How do I get an account?





- Basic account is free
 - Great for learning and thinking about if Qualtrics is right for your experiment
- Extra features require a paid account, typically issued through a license
 - For CELSS affiliates, accounts are issued through ISERP
 - <http://iserp.columbia.edu/content/request-qualtrics-account>
 - Other research groups (such as Columbia Business School) also have licenses

Qualtrics – What is It?

 Presentation Survey ▾

ProjectsContactsLibrarySurvey DirectorHelp

SurveyActionsDistributionsData & AnalysisReports

 Look & Feel Survey Flow Survey Options Tools ▾

PreviewPublishSearch


IQ Score: Great

Presentation Survey

▼ Default Question Block

Block Options ▾

☒ Q1



Click to write the question text

☐ Click to write Choice 1


☐ Click to write Choice 2

☐ Click to write Choice 3

Import Questions From...

Create a New Question ▾

Add Block

 End of Survey

Survey Termination Options...

Change Question Type

Multiple Choice ▾

Choices

3 + Edit Multiple

☐ Automatic Choices

Answers

☒ Single Answer

☐ Multiple Answer

More...

Position

☒ Vertical

☐ Horizontal

More...

Validation Options


☐ Force Response ▾


Validation Type


☒ None


☐ Custom Validation


Actions


 Add Page Break


 Add Display Logic

 Add Skip Logic

 Copy Question

 Move Question
























 Add Note

 Preview Question

Qualtrics - Vocabulary

- Question
 - A single question: multiple-choice, text, description, etc.
- Question Block or just “Block”
 - A group of questions that are presented/moved/copied as a unit
- Survey Flow
 - Overall survey map
 - Main tool for structuring/organizing

Qualtrics – Question Types

Static Content	 Descriptive Text	 Graphic
Standard Questions	 Multiple Choice	 Matrix Table
	 Text Entry	 Slider
	 Rank Order	 Side by Side
Specialty Questions	 Constant Sum	 Pick, Group, and Rank
	 Hot Spot	 Heat Map
	 Graphic Slider	 Drill Down
	 Net Promoter Score®	 Highlight
	 Signature	
Advanced	 Timing	 Meta Info Question
	 File Upload	 Screen Capture
	 Captcha Verification	
Replace From Library	 Question Library	

- Basic Multiple Choice, Text Entry Questions
- Sliders, matrices
 - All customizable
- More advanced options
 - File Uploads
 - Captchas
 - Highlighting

Qualtrics – Questions Demo

Qualtrics – Basic Structure

- Question Blocks
 - A set of questions that are moved as a single unit
 - Add features like timing to an entire block
 - Good for moving around questions and duplicating entire blocks

The screenshot displays the Qualtrics interface with two question blocks. The top block, titled 'Screening', contains two questions: Q6 (a timing question) and Q3 (a multiple-choice question about political party affiliation). The bottom block, titled 'Treatment', contains question Q4 (a multiple-choice question about favorite TV news sources). Each question has a gear icon for settings. At the bottom of the 'Screening' block, there are buttons for 'Import Questions From...' and 'Create a New Question'. A blue 'Add Block' button is located between the two blocks. The interface also includes 'Block Options' dropdown menus for each block.

▼ Screening Block Options ▼

☐ Q6 This question lets you record and manage how long a participant spends on this page. This question will not be displayed to the participant.

☐ Q3 What political party do you affiliate with most?

☐ Democratic Party

☐ Republican Party

☐ Other

[Add Block](#)

▼ Treatment Block Options ▼

☒ Q4 What is your favorite source of TV news?

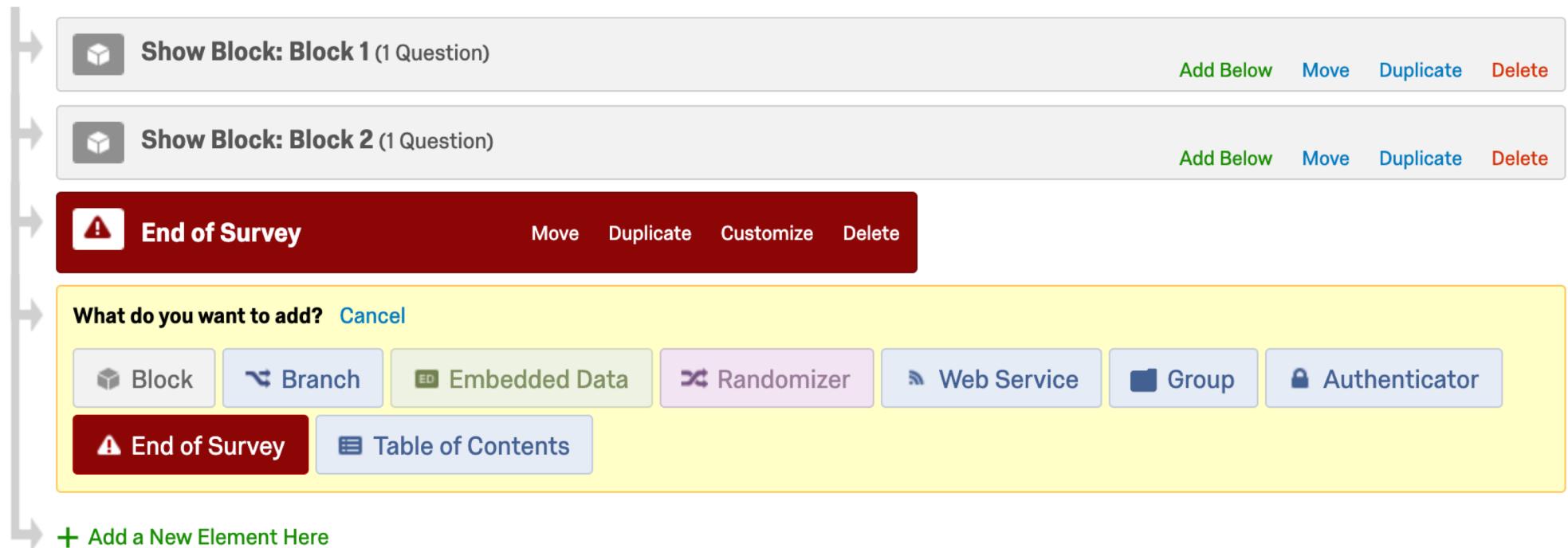
☐ Fox News

☐ CNN

☐ MSNBC

Qualtrics – Survey Flow

Survey Flow Presentation Survey



Qualtrics – Survey Flow

- Good for keeping experiment structure organized
 - (Screening, Treatment, Control)
- Branch Logic
 - Present questions conditionally (if age < 40, ask this...)
 - Custom survey ends
- Randomization
 - Can randomize subjects' treatment groups
 - Can put randomizers within randomizers
 - Allows subjects to get a random sample from question bank

Qualtrics – Survey Flow (Screening)

Survey Flow Presentation Survey



Show Block: Screening (2 Questions)

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



Then Branch If:

If What political party do you affiliate with most? **Republican Party** Is Selected [Edit Condition](#)

[Move](#) [Duplicate](#) [Options](#) [Collapse](#) [Delete](#)




End of Survey

[Move](#) [Duplicate](#) [✓ Customize](#) [Delete](#)

[+ Add a New Element Here](#)

Qualtrics – Survey Flow (Screening)

☒ Q3






What political party do you affiliate with most?

☐ Democratic Party

☒ Republican Party

☐ Other

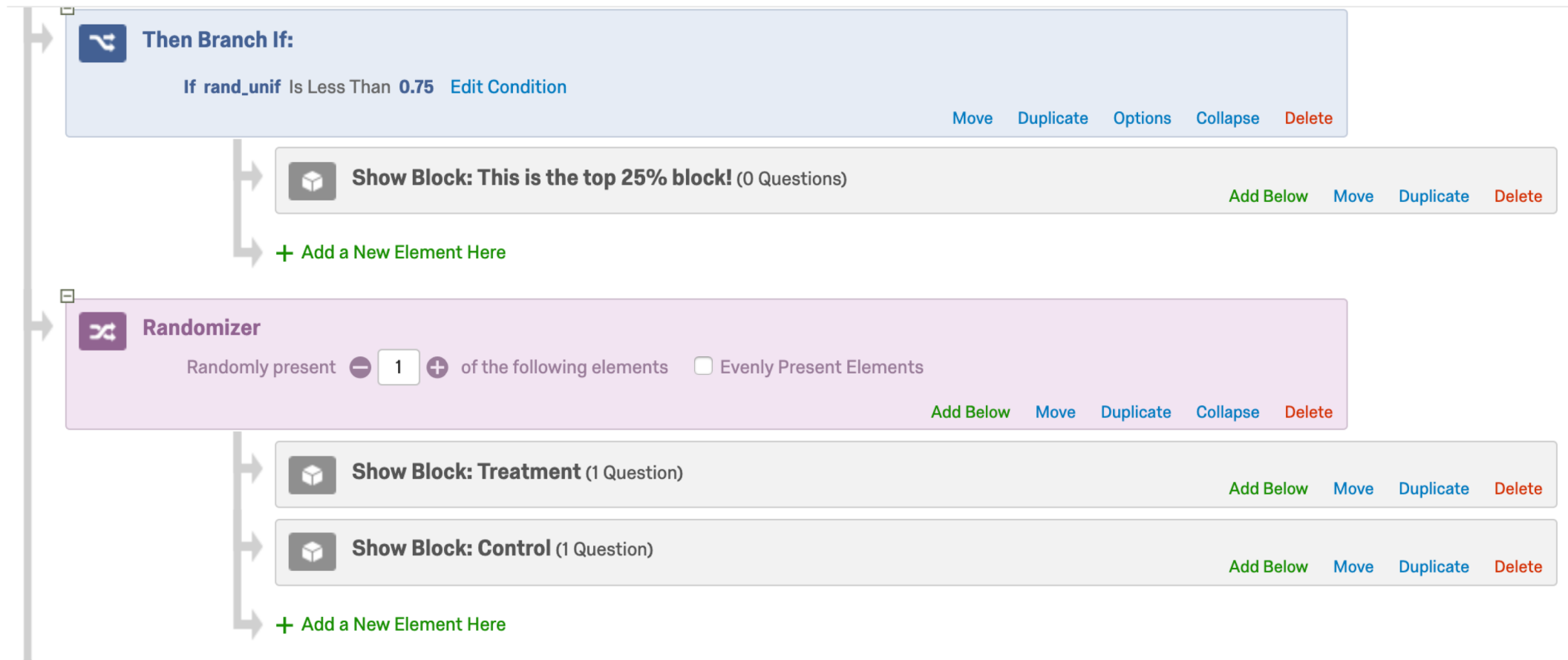


Condition: Republican Party  Is Selected  . Skip To: End of Survey 

[Done](#)

Qualtrics – Survey Flow (cont.)

Survey Flow Presentation Survey



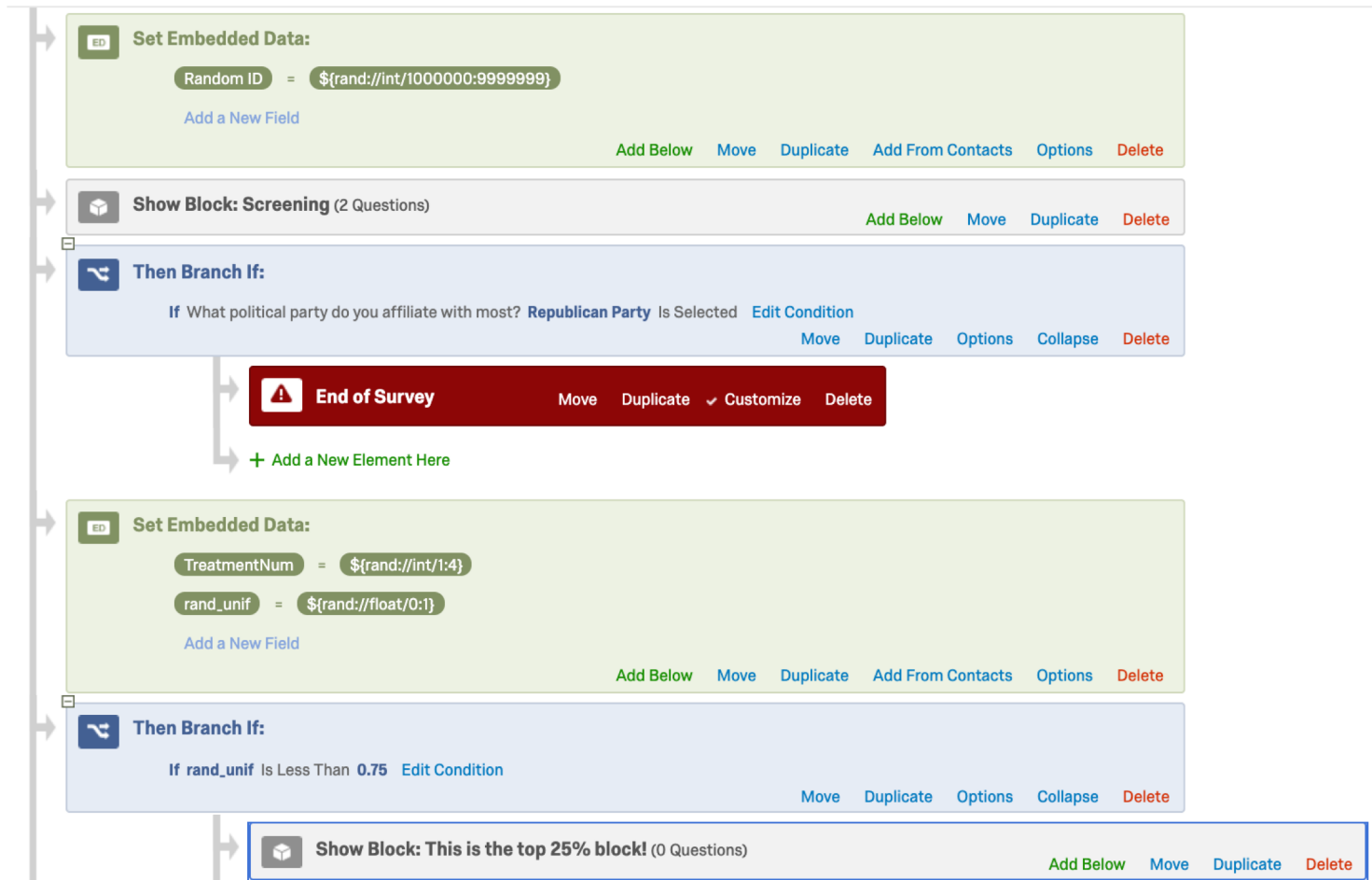
Qualtrics – Survey Flow Demo

Qualtrics – Embedded Data

- Data that is created or “set” at any point during the survey
- A randomly generated number
 - Treatment number
 - Survey ID to keep track of subjects (more on this later with MTurk)
 - A number to create a probability distribution for questions
- A value (numeric or otherwise) that is set and inserted into a future question
- Can be pulled from web or set with JavaScript (more later)

Qualtrics – Embedded Data

Survey Flow Presentation Survey



Qualtrics – Embedded Data/Piped Text

▼ Thank You

☐ Q7



Thank you so much for taking our survey! We hope that `${q://QID3/ChoiceGroup/SelectedChoices}` candidate does well in the election next year.

Below is your unique, seven-digit, survey code. Please make sure to paste it into the HIT box and submit the HIT on mechanical turk so that we may link your response to your Worker ID and grant you your bonus.

Survey Code: `${e://Field/Random_ID}`



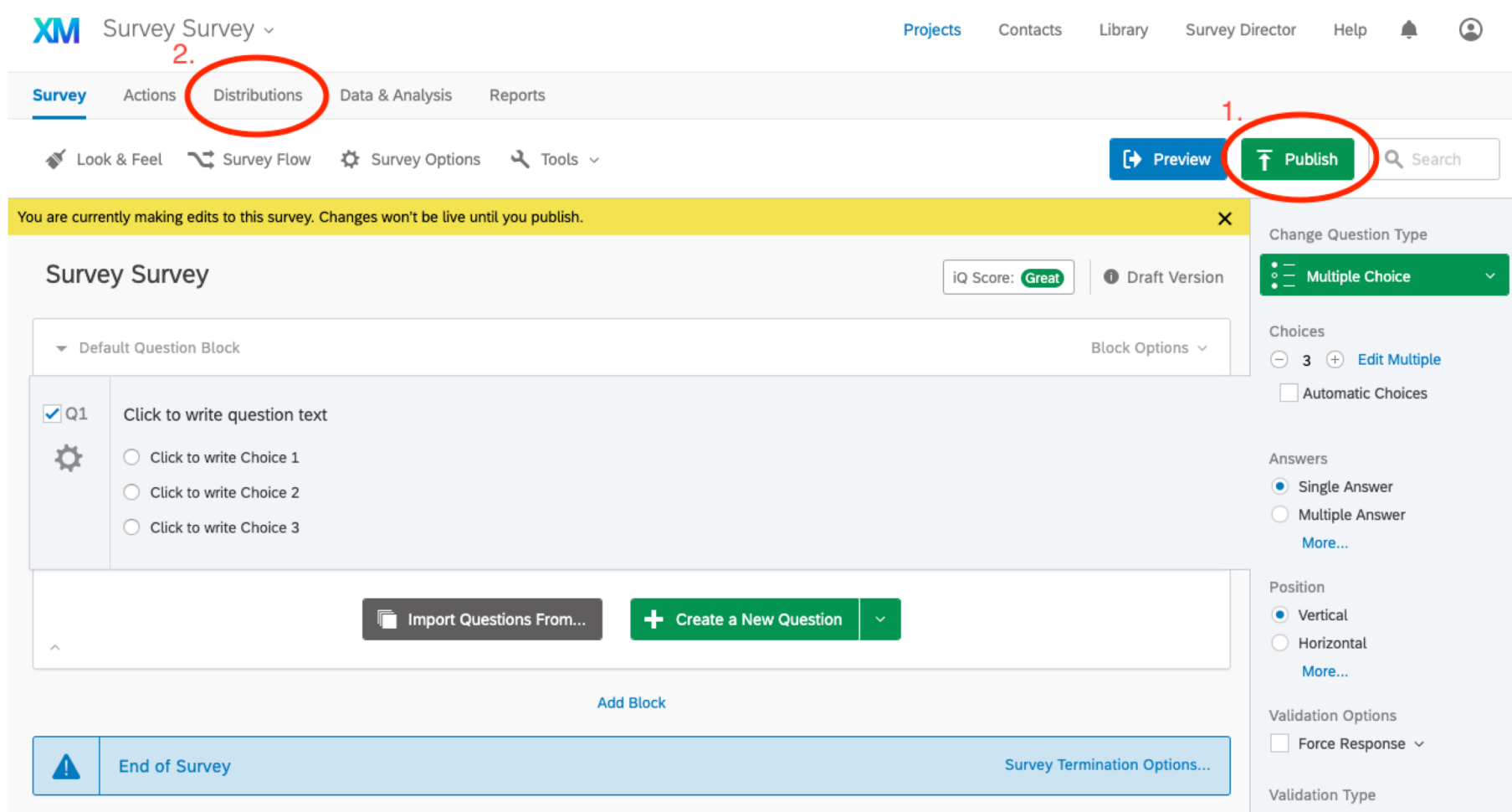
Thank you so much for taking our survey! We hope that the Democratic Party candidate does well in the election next year.

Below is your unique, seven-digit, survey code. Please make sure to paste it into the HIT box and submit the HIT on mechanical turk so that we may link your response to your Worker ID and grant you your bonus.

Survey Code: 3332863

Qualtrics – Embedded Data Demo

Qualtrics – Distributing Your Survey



The screenshot shows the Qualtrics Survey Editor interface. At the top, the 'Survey Survey' header is visible. The navigation bar includes 'Survey', 'Actions', 'Distributions', 'Data & Analysis', and 'Reports'. The 'Distributions' tab is circled in red and labeled with a red '2.'. Below the navigation bar, there are icons for 'Look & Feel', 'Survey Flow', 'Survey Options', and 'Tools'. On the right side of the navigation bar, there are buttons for 'Preview' and 'Publish'. The 'Publish' button is circled in red and labeled with a red '1.'. Below the navigation bar, a yellow banner states: 'You are currently making edits to this survey. Changes won't be live until you publish.' The main content area is titled 'Survey Survey' and includes a 'iQ Score: Great' indicator and a 'Draft Version' label. The 'Default Question Block' section shows a question 'Q1' with a 'Click to write question text' prompt and three choice options: 'Click to write Choice 1', 'Click to write Choice 2', and 'Click to write Choice 3'. Below the question block, there are buttons for 'Import Questions From...' and 'Create a New Question'. At the bottom, there is an 'Add Block' button and a blue bar with an 'End of Survey' button and a 'Survey Termination Options...' link. On the right side, there is a sidebar with settings for 'Change Question Type' (set to 'Multiple Choice'), 'Choices' (set to 3), 'Automatic Choices' (unchecked), 'Answers' (set to 'Single Answer'), 'Position' (set to 'Vertical'), and 'Validation Options' (set to 'Force Response').

XM Survey Survey ▾

Projects Contacts Library Survey Director Help

Survey Actions **Distributions** Data & Analysis Reports

Look & Feel Survey Flow Survey Options Tools ▾

Preview Publish Search

You are currently making edits to this survey. Changes won't be live until you publish.

Survey Survey iQ Score: Great Draft Version

Default Question Block Block Options ▾

☒ Q1 Click to write question text

☐ Click to write Choice 1

☐ Click to write Choice 2

☐ Click to write Choice 3

Import Questions From... Create a New Question ▾

Add Block

End of Survey Survey Termination Options...

Change Question Type

Multiple Choice ▾

Choices

3 Edit Multiple

☐ Automatic Choices

Answers

☒ Single Answer

☐ Multiple Answer

More...

Position

☒ Vertical

☐ Horizontal

More...

Validation Options

☐ Force Response ▾

Validation Type

Qualtrics – Distributing Your Survey

XM Survey Survey ▾

Projects

Contacts

Library

Survey Director

Help



Survey

Actions

Distributions

Data & Analysis

Reports

 Pause Response Collection

 Distribution Summary


 **Anonymous Link**

 Emails

 Personal Links

 Social Media

 Offline App

 QR Code

Anonymous Survey Link

A reusable link that can be pasted into emails or onto a website, and is unable to track identifying information of respondents.

https://columbia.az1.qualtrics.com/jfe/form/SV_24AcwdZvJSenkuF

Customize Link

Qualtrics – Distributing Your Survey

- “Survey Options” lets you password-protect, prevent repeat responses, and more


The screenshot displays the Qualtrics Survey Editor interface. At the top, the navigation bar includes the XM logo, 'Survey Survey', and links for Projects, Contacts, Library, Survey Director, Help, and a user profile. Below this, a secondary navigation bar contains tabs for Survey, Actions, Distributions, Data & Analysis, and Reports. The 'Survey' tab is active, and within it, the 'Survey Options' sub-tab is highlighted with a red circle. Other sub-tabs include Look & Feel, Survey Flow, and Tools. To the right of these tabs are buttons for Preview, Publish, and a search bar. The main workspace is titled 'Survey Survey' and shows a 'Default Question Block' with a question text field and three choice options. The right sidebar contains settings for 'Change Question Type' (Multiple Choice), 'Choices' (3, Edit Multiple), 'Automatic Choices', 'Answers' (Single Answer), 'Position' (Vertical), and 'Validation Options' (Force Response). The bottom bar includes 'End of Survey' and 'Survey Termination Options...'.

Qualtrics – Distribution Demo

Qualtrics – Getting Your Data

- Download the raw data as a CSV file

XM Presentation Survey ▾

Projects Contacts Library Survey Director Help 

Survey Actions Distributions **Data & Analysis** Reports

Data Text Crosstabs Weighting

Add Filter ▾

Recorded Responses **4**
Responses in Progress **0**

With Selected ▾ < Page 1 of 1 ▾ >

<input type="checkbox"/>	Recorded Date	Q3 - What political party do you affiliate with most?	Q4 - What is your favorite source of news?	Question	Actions
<input type="checkbox"/>	Nov 11, 2019 5:53 PM	Democratic Party	Fox News		<div><div>Export & Import ▾</div><div><div>Export Data...</div><div>Import Data...</div><div>Manage Previous Downloads...</div></div></div>

Qualtrics – Getting Your Data

- Pro Tip: Under “More Options” you can
 - Turn off .zip download (annoying when you’re doing a lot of downloading)
 - Turn on/off viewing order for surveys with any randomness in order

Qualtrics – Getting Your Data

- All answers, embedded data, meta data (can be a good number of columns)


R	S	T	U	V	W	X	Y	Z	A
Q6_First Click	Q6_Last Click	Q6_Page Sub	Q6_Click Count	Q3	Q4	Q5	Random_ID	Treatment	Random_ID
Timing - First Click	Timing - Last Click	Timing - Page	Timing - Click	What political party do you affiliate with most?	What is your	Click to write	Random_ID	Treatment	Random_ID
{"ImportId":"QID6_FIRST_CLICK"}	{"ImportId":"QID6_LAST_CLICK"}	{"ImportId":"QID6_PAGE_SUB"}	{"ImportId":"QID6_CLICK_COUNT"}	{"ImportId":"QID3"}	{"ImportId":"QID4"}	{"ImportId":"QID5"}	{"ImportId":"QID7"}	{"ImportId":"QID8"}	{"ImportId":"QID9"}
0.901	1.459	2.119	2	Democratic Party	CNN			4	0.501
0.736	1.79	2.183	2	Democratic Party	Fox News		3332863	3	0.28
2.475	7.001	9.923	4	Republican Party			2634971		
0.953	0.953	2.449	1	Democratic Party	Fox News		8098917	1	0.680

	A	B	C	D	E	F	G
1	StartDate	EndDate	Status	IPAddress	Progress	Duration (in	Finished
2	Start Date	End Date	Response Type	IP Address	Progress	Duration (in	Finished
3	{"ImportId":"startDate","timeZone":"America/Denver"}	{"ImportId":"endDate"}	{"ImportId":"status"}	{"ImportId":"ipAddress"}	{"ImportId":"progress"}	{"ImportId":"duration"}	{"ImportId":"finished"}
4	11/11/19 16:46	11/11/19 16:47	Survey Preview		100	6	TRUE
5	11/11/19 16:48	11/11/19 17:02	Survey Preview		100	805	TRUE
6	11/11/19 17:52	11/11/19 17:52	Survey Preview		100	10	TRUE
7	11/11/19 17:52	11/11/19 17:53	Survey Preview		100	17	TRUE

Qualtrics – Getting Your Data

■ Can also use Qualtrics’ “Reports” Feature


XM Presentation Survey ▾


Projects Contacts Library Survey Director Help 

Survey Actions Distributions Data & Analysis **Reports**


Results Reports


Report: Default Report ▾ Add Filter ▾

 Add Report Breakout ▾

 Search Questions



+ Create Custom Page

 Q6 - Timing

 Q3 - What political party do you affiliate with most?

Q6 - Timing

#	Field	Minimum	Maximum	Mean	Std D	Count
1	Timing - First Click	0.74	2.48	1.27	0	4
2	Timing - Last Click	0.95	7.00	2.80	2	4

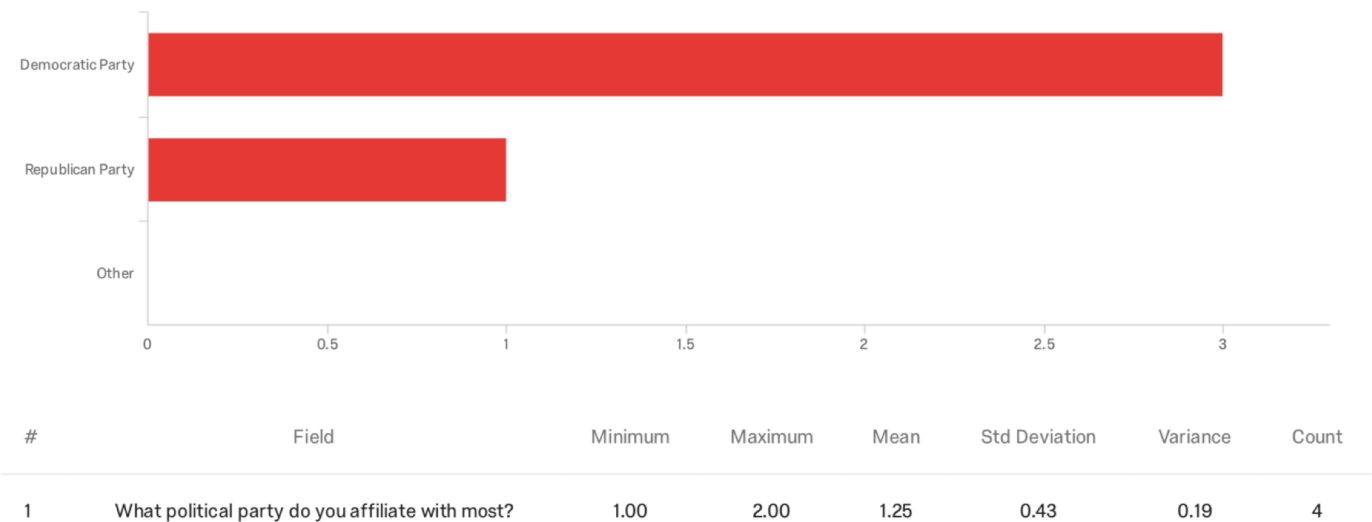
 Share Report ▾ 

- PDF Document
- Word Document
- PowerPoint Slides
- CSV (Comma Separated)
- Export Raw Data
- Download Previous Exports...
- Manage Public Report...
- Schedule Report Email...

Qualtrics – Getting Your Data

- Reports can be nice visually
 - Can see the survey questions
 - Default graphs (can change/add more)
- Not too efficient for large projects with a lot of data
- Less freedom than downloading raw data into CSV

Q3 - What political party do you affiliate with most?




Qualtrics – Getting Your Data Demo

Qualtrics – Design

- Paid accounts have decent flexibility in terms of aesthetics
- Can remove logos
 - Maybe you think having “Columbia” on every page will bias participants
- Can choose from a few themes
- Add a progress bar
- Custom CSS

Qualtrics – Design

Look and Feel

Theme 
Columbia Business
School - 508 Compliant

Layout


General


Style


Motion


Logo



Background



Dynamic Themes 


Presets 


Desktop


Glacier Mountains



 My Survey 

 **Columbia Business School**
AT THE VERY CENTER OF BUSINESS™

What political party do you affiliate with most?


Democratic Party

Republican Party

Other

[← Back to Old Editor](#)

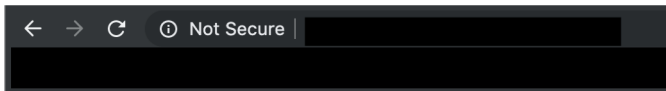
[Cancel](#)

 [Save](#)

Qualtrics – Look and Feel Demo

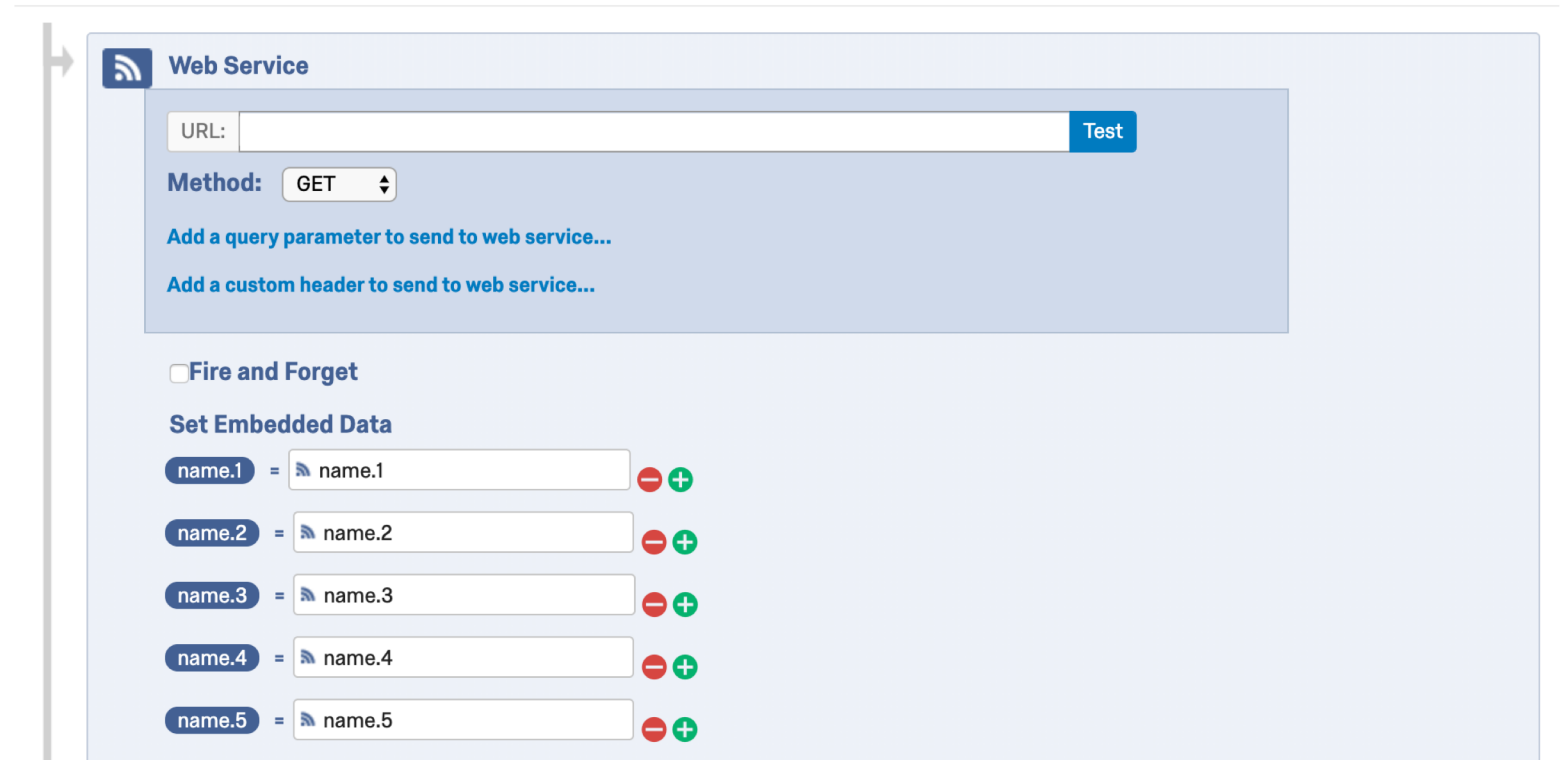
Qualtrics – Web Elements

- Can import data and automatically set to Embedded Data from websites.



```
{
  "name.1" : "",
  "name.2" : "",
  "name.3" : "",
  "name.4" : "",
  "name.5" : "",
  "name.6" : "",
  "name.7" : "",
  "name.8" : "",
  "name.9" : "",
  "name.10" : "",
  "name.11" : "",
  "name.12" : "",
  "name.13" : "",
  "name.14" : "",
  "name.15" : "",
  "name.16" : "",
  "name.17" : "",
  "name.18" : "",
  "name.19" : "",
  "name.20" : "",
  "name.21" : "",
  "name.22" : "",
  "name.23" : "",
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  "name.25" : "",
  "name.26" : "",
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  "name.28" : "",
  "name.29" : "",
  "name.30" : "",
  "name.31" : "",
  "name.32" : "",
  "name.33" : "",
  "name.34" : "",
  "name.35" : "",
  "name.36" : "",
  "name.37" : "",
  "name.38" : "",
  "name.39" : "",
  "name.40" : "",
  "title.1" : "",
  "title.2" : "",
  "title.3" : "",
  "title.4" : ""
}
```

Survey Flow



Web Service

URL: **Test**

Method: **GET**

[Add a query parameter to send to web service...](#)

[Add a custom header to send to web service...](#)

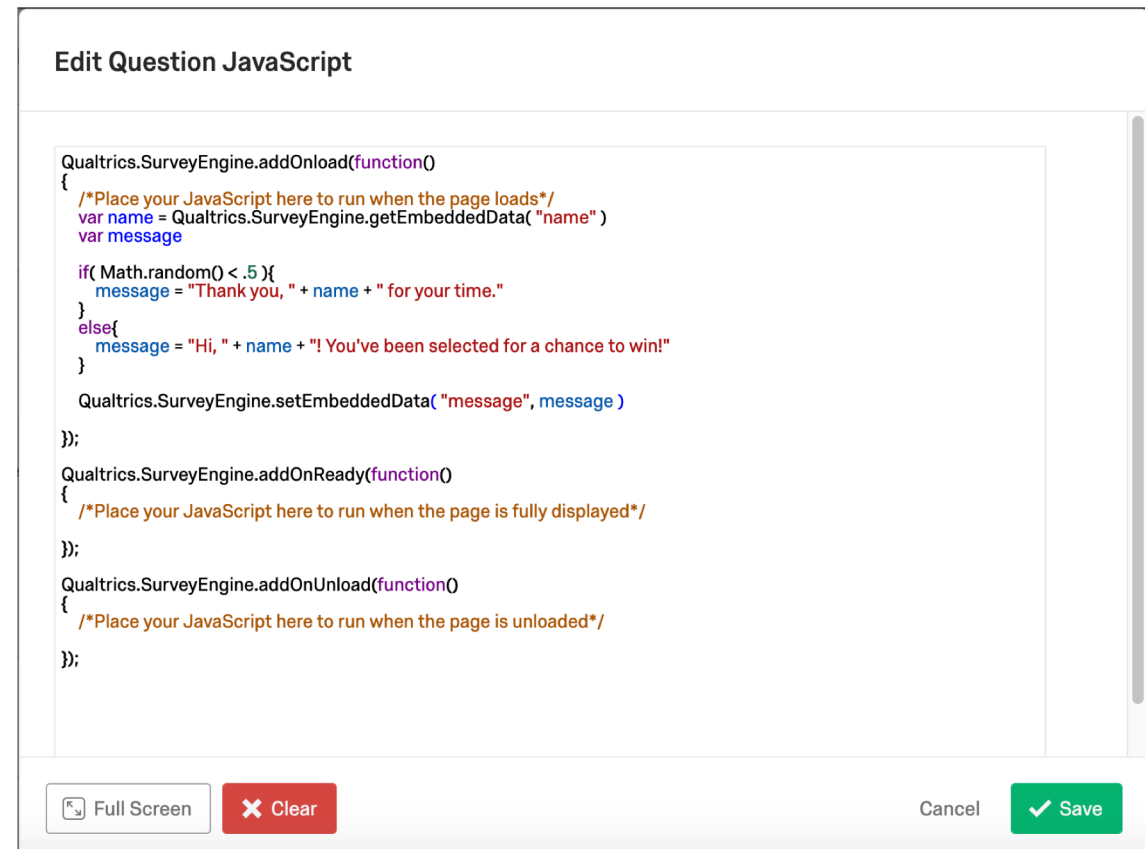
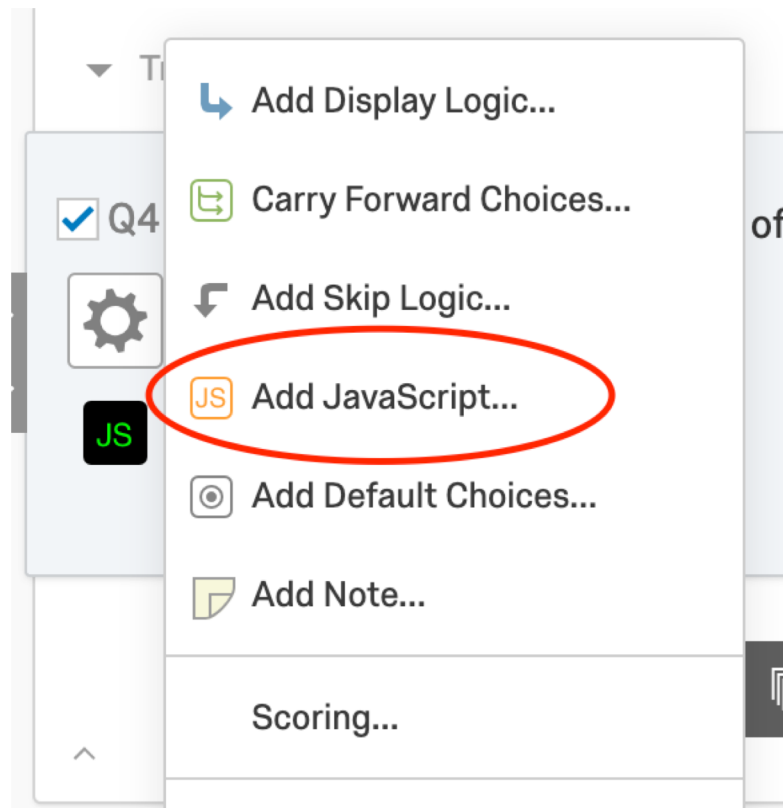
☐ Fire and Forget

Set Embedded Data

name.1	=	<input type="text" value="name.1"/>	<input type="button" value="-"/>	<input type="button" value="+"/>
name.2	=	<input type="text" value="name.2"/>	<input type="button" value="-"/>	<input type="button" value="+"/>
name.3	=	<input type="text" value="name.3"/>	<input type="button" value="-"/>	<input type="button" value="+"/>
name.4	=	<input type="text" value="name.4"/>	<input type="button" value="-"/>	<input type="button" value="+"/>
name.5	=	<input type="text" value="name.5"/>	<input type="button" value="-"/>	<input type="button" value="+"/>

Qualtrics – JavaScript

- JavaScript can help when datasets get larger or the experiment gets more complicated



Qualtrics – JavaScript

- JavaScript can help when datasets get larger or the experiment gets more complicated
- Pro Tip: Need to run JavaScript the block before if setting embedded data that will be used immediately

Item Index

Methods

addEmbeddedData	enableNextButton	getChoiceVariableName	hideNextButton
addOnClick	enablePreviousButton	getPostTag	hidePreviousButton
addOnload	getAnswers	getQuestionContainer	setChoiceAnswerValue
addOnReady	getChoiceAnswerValue	getQuestionDisplayed	setChoiceValue
addOnPageSubmit	getChoiceContainer	getQuestionInfo	setChoiceValueByRecodeValue
addOnUnload	getChoiceDisplayed	getQuestionTextContainer	setChoiceValueByVariableName
clickNextButton	getChoiceRecodeValue	getSelectedAnswers	setEmbeddedData
clickPreviousButton	getChoices	getSelectedAnswerValue	showNextButton
disableNextButton	getChoicesFromRecodeValue	getSelectedChoices	showPreviousButton
disablePreviousButton	getChoicesFromVariableName	getTextValue	
displayErrorMessage	getChoiceValue	hideChoices	

Properties

Qualtrics.SurveyEngine.QuestionInfo	questionclick	questionContainer	questionId
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<https://s.qualtrics.com/WRAPI/QuestionAPI/classes/Qualtrics%20JavaScript%20Question%20API.html>

Thank You!

Come to CELSS consulting hours!

<https://celss.iserp.columbia.edu/>

Wednesdays 2:30-5pm

Thursdays 10:30am-1pm

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