



Experiments With Qualtrics

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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. At the top right, there are links for 'LOGIN', 'SUPPORT', and a 'FREE ACCOUNT' button. The navigation menu includes 'qualtrics.XM', 'PRODUCTS', 'SOLUTIONS', 'COMPANY', 'CUSTOMERS', and 'RESOURCES'. The main headline reads 'THE EXPERIENCE MANAGEMENT PLATFORM™' followed by 'Deliver exceptional customer, product, brand and employee experiences on the #1 XM platform'. A 'REQUEST DEMO' button is located below the headline. On the left side, there is a vertical 'FEEDBACK' button. On the right, a smartphone displays a notification titled 'Activity' with the text 'below YTD average in the past 30 days.' and 'Smart Notifications 1 hours ago'. The notification highlights a 'Major drop in product availability' with a red line graph and the number '1.8'. Below the graph, it says 'Average performance for one of the "Key Drivers: Product availability" has declined 1.8 points over the last 30 days!'. At the bottom of the smartphone screen, a chat bubble asks 'Which experience are you interested in improving?' next to a 'XM' logo with a red notification badge containing the number '2'.

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?

The screenshot displays the Qualtrics survey editor interface for a survey titled "Presentation Survey". At the top, the XM logo and "Presentation Survey" are visible on the left, and navigation links for "Projects", "Contacts", "Library", "Survey Director", and "Help" are on the right. Below this is a secondary navigation bar with "Survey" (selected), "Actions", "Distributions", "Data & Analysis", and "Reports". A toolbar contains "Look & Feel", "Survey Flow", "Survey Options", and "Tools" icons, along with "Preview" and "Publish" buttons and a search box. The main workspace shows a "Default Question Block" containing a question "Q1" with the text "Click to write the question text" and three choice options: "Click to write Choice 1", "Click to write Choice 2", and "Click to write Choice 3". Below the question block are buttons for "Import Questions From..." and "Create a New Question". A blue bar at the bottom indicates the "End of Survey" section with "Survey Termination Options..." on the right. On the right side, a configuration panel titled "Change Question Type" is open, showing "Multiple Choice" selected. Other settings include "iQ Score: Great", "3" choices, "Single Answer" selected, "Vertical" position, and "None" validation type. A list of actions like "Add Page Break", "Add Display Logic", "Add Skip Logic", "Copy Question", "Move Question", "Add Note", and "Preview Question" is also visible.

XM Presentation Survey ▾

Projects Contacts Library Survey Director Help

Survey Actions Distributions Data & Analysis Reports

Look & Feel Survey Flow Survey Options Tools

Preview Publish Search

Presentation Survey

iQ Score: Great

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

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...

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 is titled 'Screening' and contains two questions: Q6 (disabled) and Q3. The bottom block is titled 'Treatment' and contains question Q4. The interface includes a 'Block Options' dropdown in the top right of each block, an 'Add Block' button between blocks, and 'Import Questions From...' and 'Create a New Question' buttons at the bottom of the 'Screening' 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

Import Questions From... [+ Create a New Question](#) ▼

[Add Block](#)

▼ Treatment Block Options ▼

Q4 What is your favorite source of TV news?

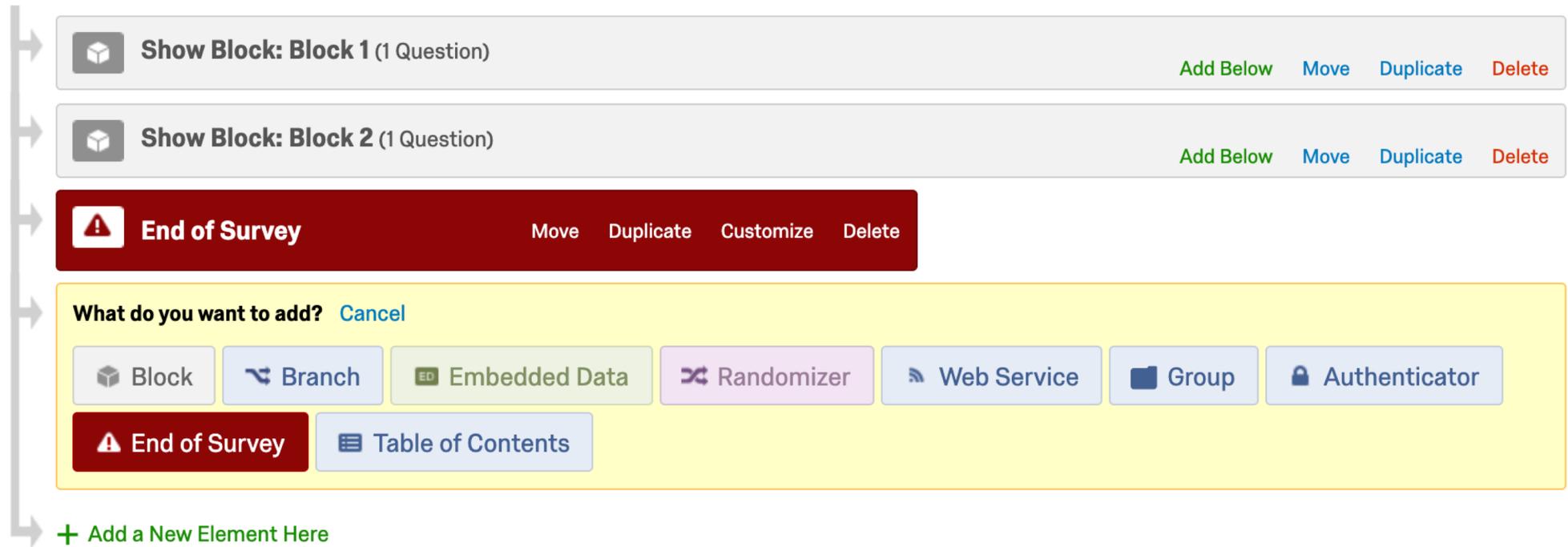
Fox News

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

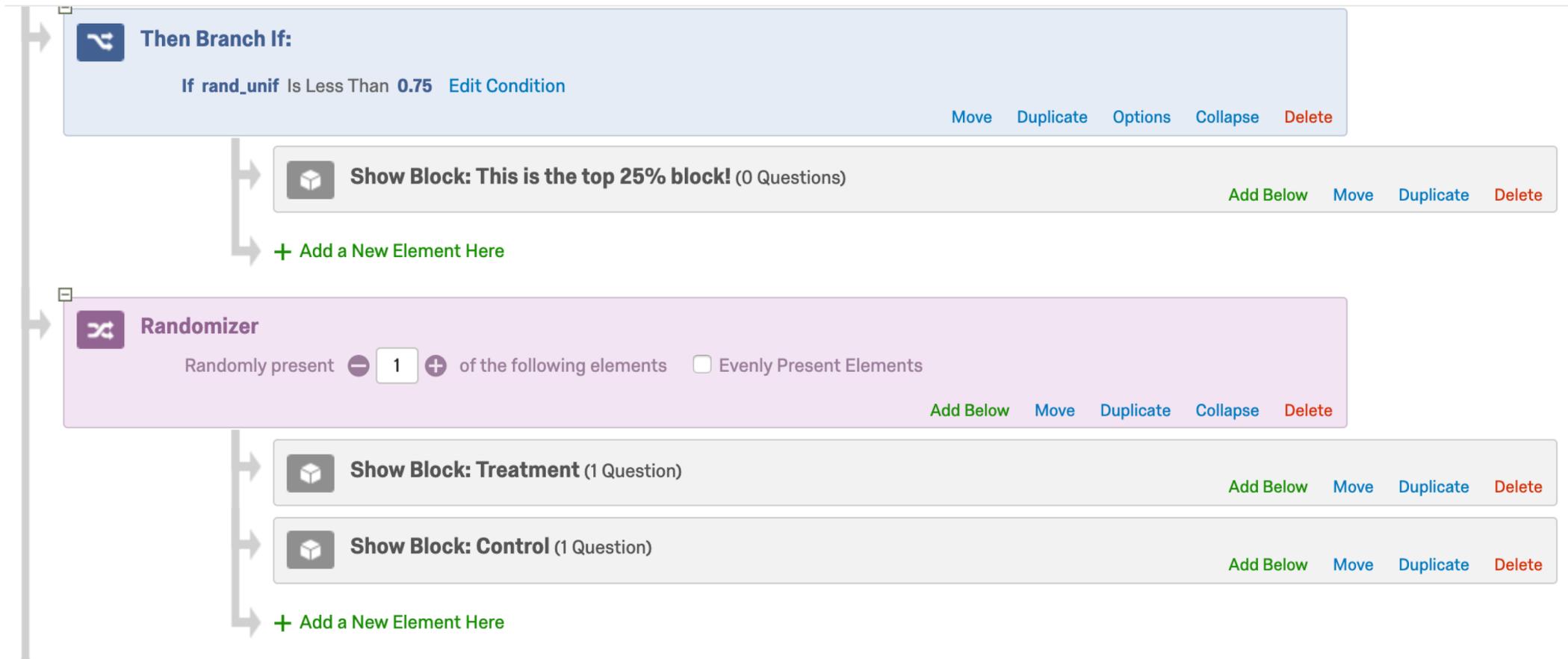
Republican Party

Other

 Condition: . Skip To: [Done](#)

Qualtrics – Survey Flow (cont.)

Survey Flow Presentation Survey



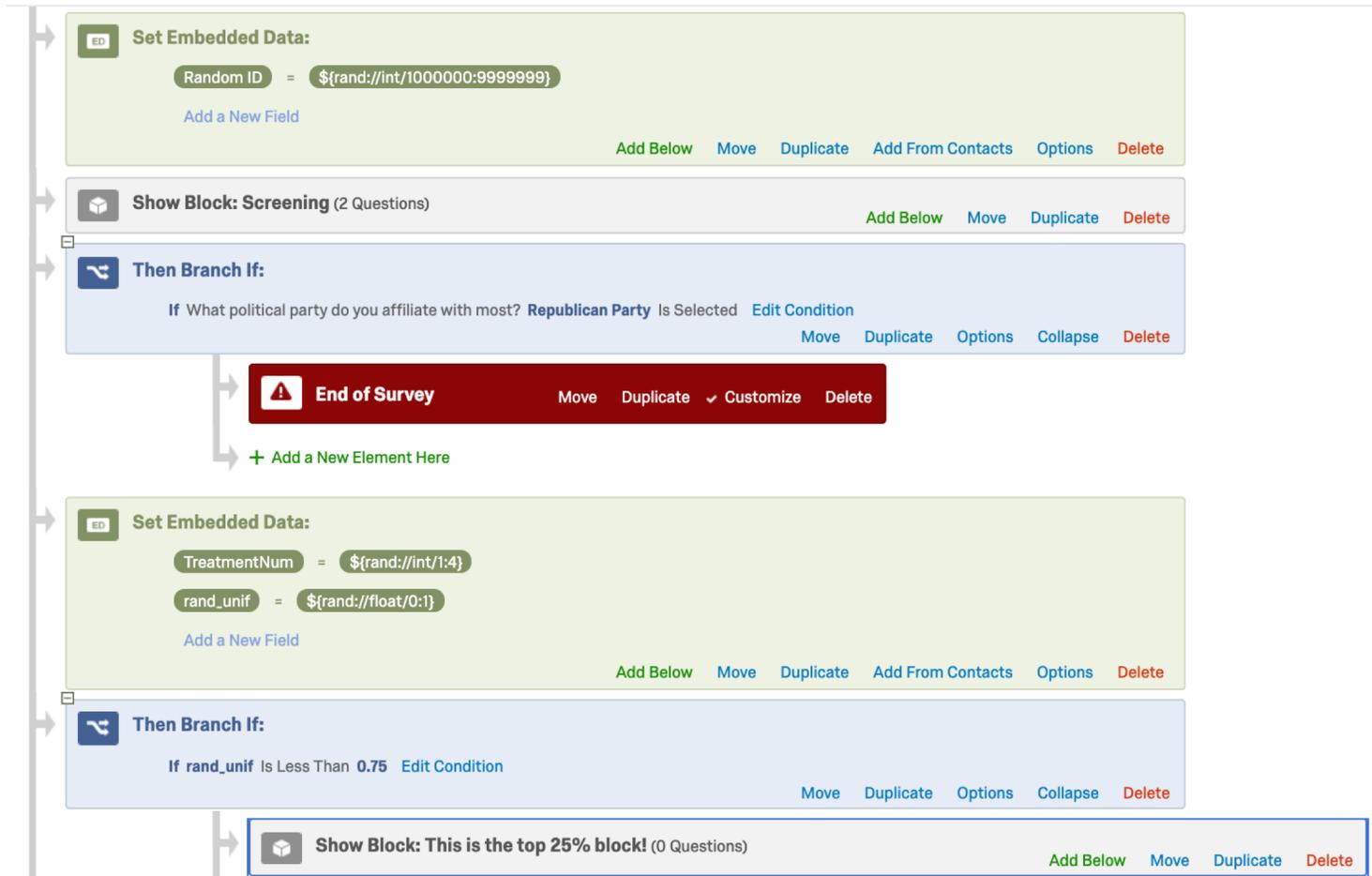
Qualtrics – Survey Flow Demo

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 displays the Qualtrics Survey Editor interface. At the top left, the 'XM Survey Survey' logo is visible. The navigation bar includes 'Survey', 'Actions', 'Distributions', 'Data & Analysis', and 'Reports'. The 'Distributions' tab is highlighted with a red circle and a '2.' annotation. 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', with the 'Publish' button circled in red and labeled with a '1.'. A yellow notification bar at the top states: 'You are currently making edits to this survey. Changes won't be live until you publish.' The main content area shows a 'Survey Survey' title, an 'iQ Score: Great' indicator, and a 'Draft Version' label. Below this, there is a 'Default Question Block' section with a 'Q1' checkbox and a 'Click to write question text' prompt. There are also options to 'Click to write Choice 1', 'Click to write Choice 2', and 'Click to write Choice 3'. At the bottom of the question block, there are buttons for 'Import Questions From...' and '+ Create a New Question'. The right sidebar contains 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').

Qualtrics – Distributing Your Survey

 Pause Response Collection

 Distribution Summary

 **Anonymous Link**

 Emails

 Personal Links

 Social Media

 Offline App

 QR Code

Anonymous Survey Link

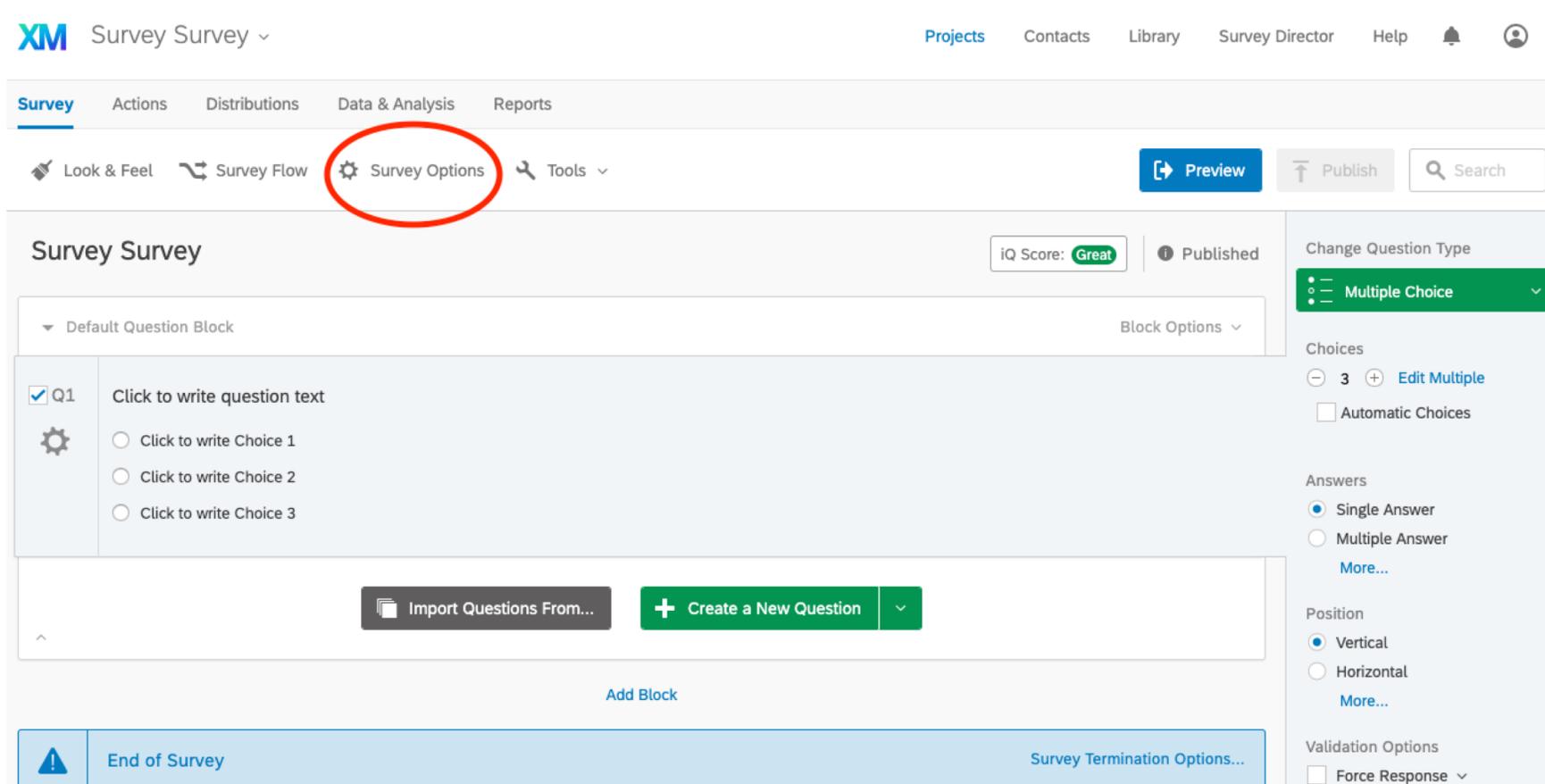
A reusable link that can be pasted into emails or onto a website, and is unable to track identifying information of respondents.

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 shows the Qualtrics interface for editing a survey. The top navigation bar includes 'Survey Survey' and links for 'Projects', 'Contacts', 'Library', 'Survey Director', 'Help', and a user profile icon. Below this, a secondary navigation bar contains 'Survey', 'Actions', 'Distributions', 'Data & Analysis', and 'Reports'. A third navigation bar features icons for 'Look & Feel', 'Survey Flow', 'Survey Options' (circled in red), and 'Tools'. To the right of this bar are 'Preview' and 'Publish' buttons, and a search box. The main content area is titled 'Survey Survey' and includes an 'iQ Score: Great' indicator and a 'Published' status. A 'Default Question Block' is visible, containing a question 'Q1' with a gear icon for settings. Below the question are three radio buttons for 'Click to write Choice 1', 'Click to write Choice 2', and 'Click to write Choice 3'. At the bottom of the question block are buttons for 'Import Questions From...' and '+ Create a New Question'. A blue bar at the very bottom contains an 'End of Survey' warning icon and a 'Survey Termination Options...' link. On the right side, a 'Change Question Type' panel is open, showing 'Multiple Choice' selected, with options for 'Choices' (3, Edit Multiple, Automatic Choices) and 'Answers' (Single Answer, Multiple Answer, More...). A 'Position' panel shows 'Vertical' selected, and a 'Validation Options' panel shows 'Force Response' unchecked.

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		

Export & Import ▾

Export Data...

Import Data...

Manage Previous Downloads...

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 Cou	Q3	Q4	Q5	Random_ID	TreatmentN	rand_t
Timing - First Click	Timing - Last	Timing - Pag	Timing - Clic	What political party do you affiliate with most?	What is your	Click to write	Random_ID	TreatmentN	rand_t
{"ImportId":"QID6_FIRST_CLICK"}	{"ImportId":	{"ImportId":	{"ImportId":	{"ImportId":"QID3"}	{"ImportId":	{"ImportId":	{"ImportId":	{"ImportId":	{"Impc
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":	{"ImportId":	{"ImportId":	{"ImportId":
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 ▾

Share Report ▾ 

Add Report Breakout ▾

Search Questions

+ Create Custom Page

Q6 - Timing

Q3 - What political party do you affiliate with most?

Q6 - Timing

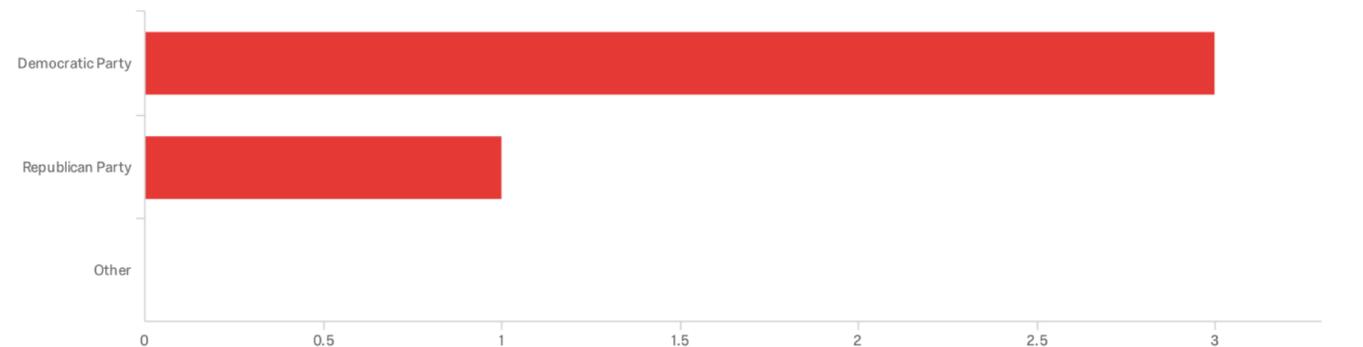
#	Field	Minimum	Maximum	Mean	Std D	Count
1	Timing - First Click	0.74	2.48	1.27	0	4
2	Timing - Last Click	0.95	7.00	2.80	2	4

- 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?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	What political party do you affiliate with most?	1.00	2.00	1.25	0.43	0.19	4



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

Dynamic Themes ⓘ

Presets ▾

Theme ⚠
Columbia Business School - 508 Compliant

Layout

General

Style

Motion

Logo

Background

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

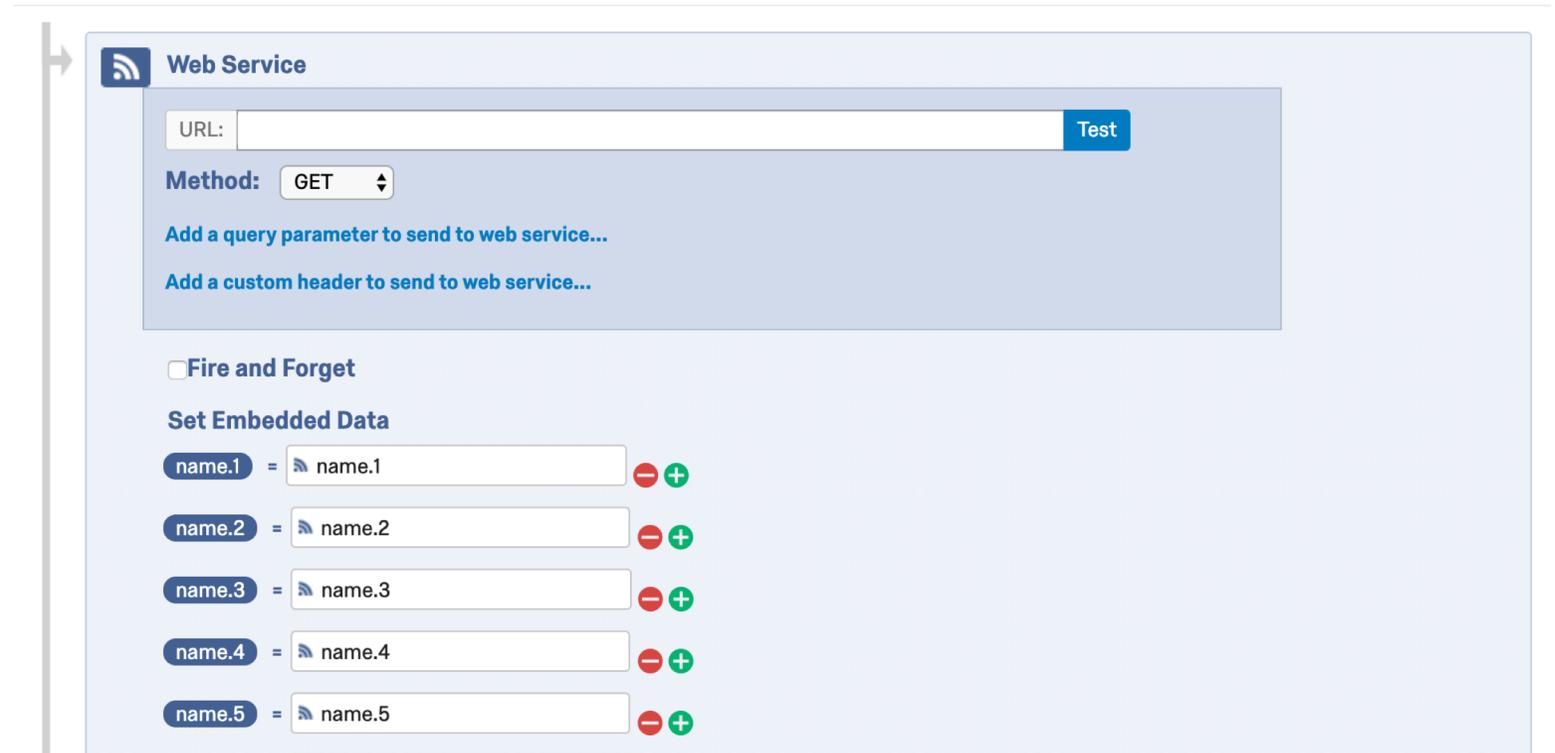
Qualtrics – Web Elements

- 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" : "",
"name.24" : "",
"name.25" : "",
"name.26" : "",
"name.27" : "",
"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" : ""
}
```

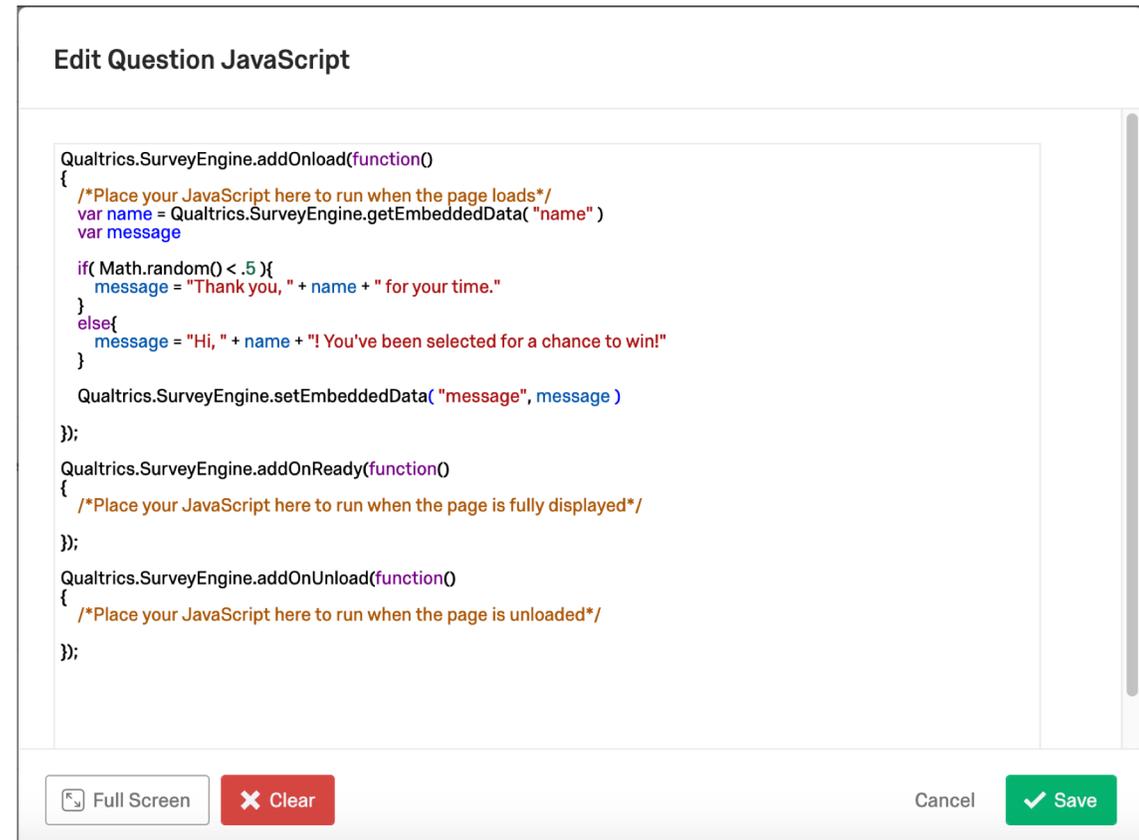
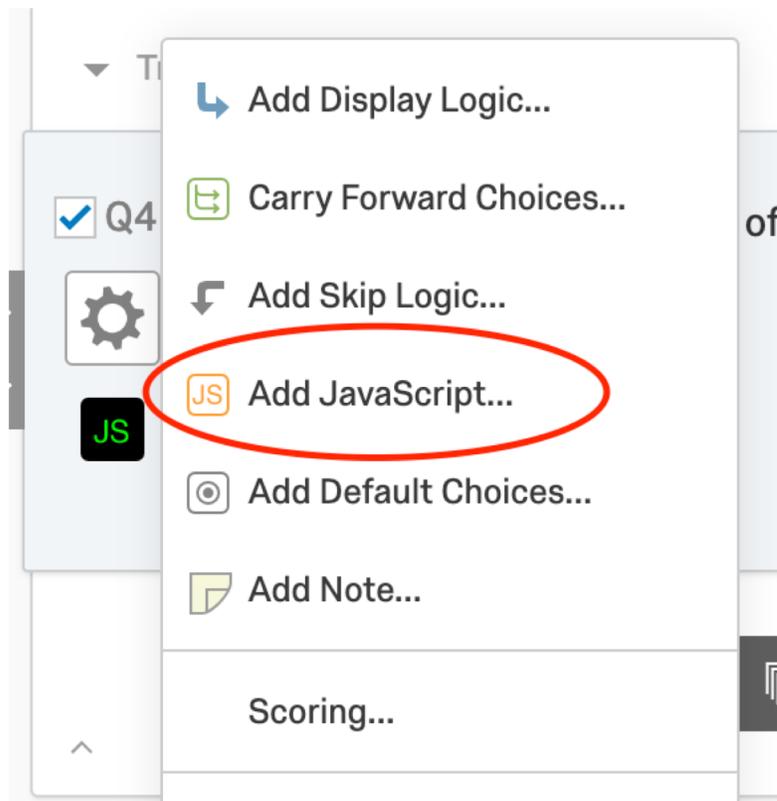
Survey Flow



The screenshot shows the 'Web Service' configuration panel in the Qualtrics Survey Flow interface. The panel includes a 'URL' field with a 'Test' button, a 'Method' dropdown set to 'GET', and links to 'Add a query parameter to send to web service...' and 'Add a custom header to send to web service...'. Below this, there is a 'Fire and Forget' checkbox and a 'Set Embedded Data' section. The 'Set Embedded Data' section contains five rows, each with a variable name (name.1 through name.5) and a corresponding input field containing the same name, with minus and plus icons for editing.

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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