

# *Qualtrics Seminar*

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ASU New College Statistics and Methods Lab

Fall 2022



# *Overview*

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- Basic information
- What is Qualtrics and why use it?
- Signing up and creating new studies
- Navigating Qualtrics
- Survey blocks, questions, etc.
- Distributions
- Linking to Sona
- Viewing and exploring data
- Downloading a data table

# *Basic information for ASU Qualtrics*

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- ASU has a Qualtrics site license that UTO administers, and individual units need to pay UTO to access.
- SBS (or New College) has entered into an agreement with UTO and KE (Knowledge Enterprise, i.e., the ASU Research Administration) and paid to access the Qualtrics license for the year.
- It is an unlimited license, meaning that we don't have to track who or how many of our ASU students and faculty request access to Qualtrics.
- SBS students/faculty/staff who want to access their free-to-them (SSO) ASU Qualtrics account can either: (1) request access through the MyASU > Service > Software Request route, or (2) follow the instructions on UTO's university-wide Qualtrics set-up page (go to [asu.qualtrics.com](https://asu.qualtrics.com)).
- If they do the set up through [asu.qualtrics.com](https://asu.qualtrics.com), they may see something saying that their Qualtrics account is associated with ASU's College of Liberal Arts & Sciences (aka CLAS, aka "The College"). This is not the case, but it doesn't matter that it says this.

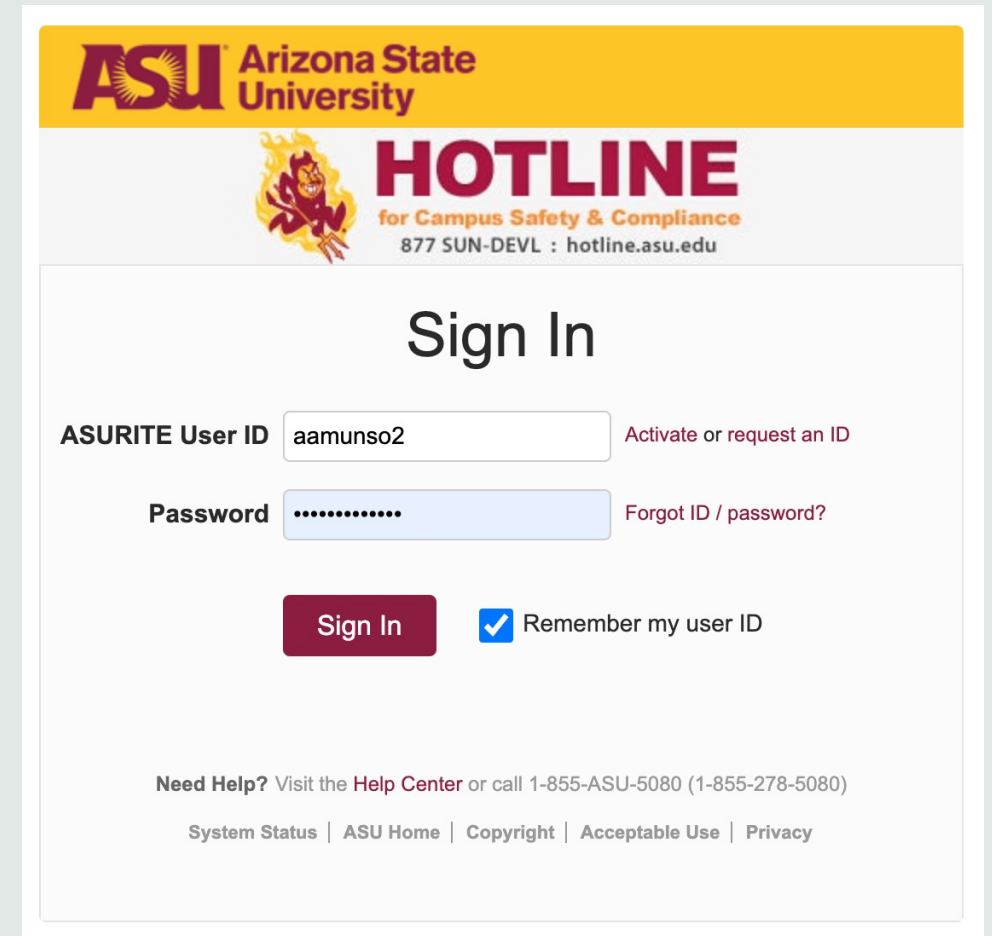
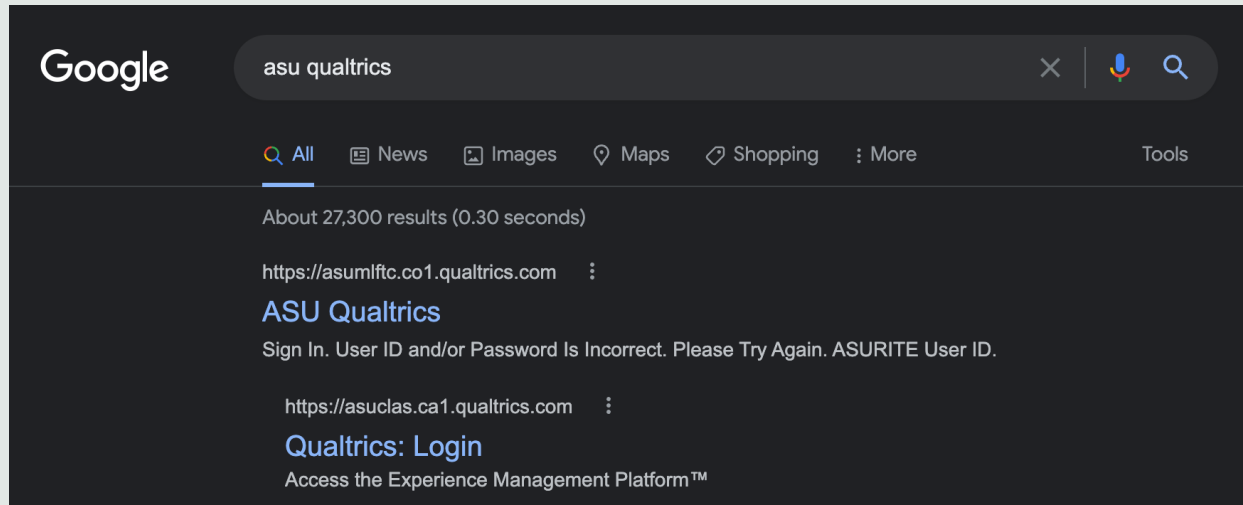
# *What is Qualtrics, and why use it?*

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- Survey program that allows you to collect information from participants
- Links with Sona, MTurk, Prolific, and other survey-distribution websites
- Great tech support

# Getting Started

- Access ASU Qualtrics
- Sign in with your ASURITE ID



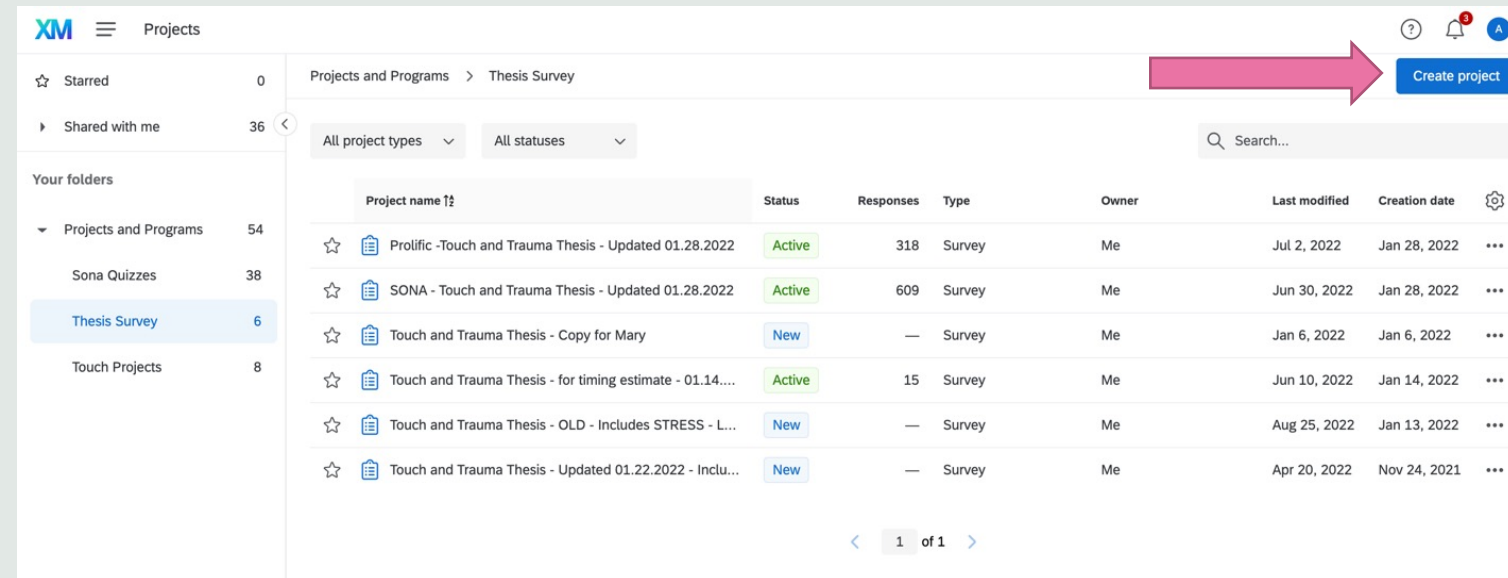
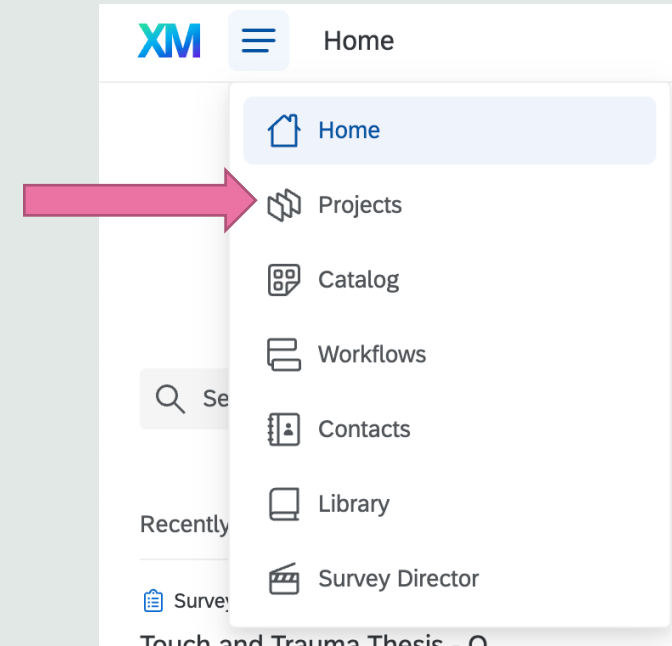
# Dashboard

- After signing in, you will be directed to the Qualtrics Dashboard
- From here, you can create a new project, view recently visited studies, and more
- Click the three lines in the upper left of the screen (more on next slide)

The screenshot shows the Qualtrics Dashboard interface. At the top left, a pink arrow points to the menu icon (three horizontal lines). Below the menu icon, the text 'Home' is visible. The main header area includes a user profile icon with the letter 'A', the text 'Welcome to XM', and a settings gear icon. A search bar is located below the header with the placeholder text 'Search by name, type, owner...'. The 'Recently visited' section is highlighted with a pink arrow and contains a list of surveys: 'Survey Touch and Trauma Thesis - O...' (New), 'Survey Doyle & Frank (2016)' (37 Responses, Active), 'Survey Bal & Veltkamp (2013)' (16 Responses, Active), 'Survey Kray et al. (2010)' (19 Responses, Active), 'Survey Basden et al. (2000) - Copy' (31 Responses, Active), and 'Survey Fusaroli et al., 2014' (24 Responses, Active). At the bottom left, a pink arrow points to a blue button labeled 'Create a new project'. The main content area features 'Important notifications' with two items about shared surveys, 'Active surveys' with three cards showing response trends for 'Fusaroli et al., 2014' (6 new responses), 'Doyle & Frank (2016)' (9 new responses), and 'Roth et al. (2021)' (0 new responses), and 'Your workflows summary' with a 'Create a workflow' button. The footer includes the ASU logo and the text 'ARIZONA STATE UNIVERSITY', along with links for 'Qualtrics.com', 'Contact Information', and 'Legal'.

# Creating New Projects

- Use the three lines to find your current projects
- You can click current projects to edit them, and you can create a new project from your projects page
- After clicking the create project button, you will be directed to the screen on the following slide



# Creating New Projects (cont'd)

- We will be making our survey from scratch, so click "Survey"
- After doing so, the image to the far right will pop up on the right side of your screen
- Click the "Get Started" button at the bottom of the screen

The screenshot shows the 'Create a project' page in the XM application. On the left is a sidebar with filters for 'Type', 'What you're measuring', 'Department', 'Use case', 'XM category', and 'What's included'. The main content area is titled 'Create a project' and is divided into 'From scratch' and 'Guided projects' sections. In the 'From scratch' section, there is a 'Survey' button with a document icon, which is highlighted by a pink arrow. The 'Guided projects' section contains a grid of project templates such as 'Customer Satisfaction (CSAT)', 'Relationship NPS', 'Touchpoint NPS (Transactional NPS)', 'Transactional Customer Effort Score (CES)', 'Event Feedback', 'Training Feedback', 'Team Event Feedback', 'Manager Feedback', 'Benefits & Perks', 'Concept Testing (Basic)', 'Pricing Study (Van Westendorp)', and 'Product Naming'. At the bottom of the page, there is a 'Project templates' section and a blue 'Get started' button, which is also highlighted by a pink arrow.

The sidebar on the right shows the details for a 'Survey' project. It includes a close button (X) in the top right corner. The title is 'Survey'. Below the title is a description: 'Begin a survey from scratch or get started with a previous file.' Under 'Best used for', it lists 'Creating ad-hoc surveys'. Under 'What's included', it lists 'Blank survey'. Under 'Related links', there is a link 'Learn how to create a survey'. At the bottom of the sidebar is a blue 'Get started' button.



# Creating New Projects (cont'd)

- Getting started will take you to this screen
- You can name your project
- Select the folder you'd like your project in
- And select how you'd like to start your survey
- Then select "create project"

The screenshot shows a 'Create a new project' dialog box. It has a title bar 'Create a new project' and a subtitle 'Survey'. Below the subtitle are three input fields: 'Name' with the text 'Untitled project', 'Folder' with a folder icon and the text 'Projects and Programs', and 'How do you want to start your survey?' with the text 'Create a blank survey project'. At the bottom, there is a blue button labeled 'Create project' and a blue link labeled 'Cancel'. Four pink arrows point from the left side of the slide to the 'Name', 'Folder', 'How do you want to start your survey?', and 'Create project' elements.

# Blocks and Questions

- You will be redirected to this screen
- You can choose the name of your block (currently says "Default Question Block"), name each question (currently "Q1"), create a question (currently "Click to write the question text"), and insert answer choices (currently "Click to write Choice 1", etc.)
- \*Changing the names of blocks and questions will help tremendously with data cleaning

The screenshot displays the XM Survey Editor interface for a survey titled "SAM Lab Example". The interface is divided into a left sidebar with configuration options and a main editing area. The sidebar includes sections for "Question type" (set to "Multiple choice"), "Answer type" (with "Allow one answer" selected), "Choices" (set to 3), and "Format" (set to "List" and "Vertical"). The main editing area shows a "Default Question Block" containing a question labeled "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". Three pink arrows point from the sidebar to the main area: one from "Answer type" to the "Allow one answer" radio button, one from "Choices" to the question text area, and one from the "Number of choices" field to the choice list. The main area also features a search bar, "Preview" and "Publish" buttons, an "ExpertReview score" of "Great", and "Import from library" and "Add new question" buttons at the bottom. The survey concludes with the text "End of Survey" and "We thank you for your time spent taking this survey. Your response has been recorded."

# Blocks

- Blocks are the outline of your survey
- Each block comes up as a new page on your survey (when administered)
- Clicking the three corner dots will give you numerous options

The screenshot displays the XM Survey Editor interface for a survey titled "SAM Lab Example". The interface is divided into several sections:

- Navigation:** Survey, Workflows, Distributions, Data & Analysis, Results, Reports.
- Tools:** Saved at 1:26 PM, Draft.
- Question Configuration (Left Panel):**
  - Question type:** Multiple choice
  - Answer type:** Allow one answer (selected), Allow multiple answers
  - Choices:** Number of choices: 3. Edit multiple. Use suggested choices: Off.
  - Format:** List, Alignment: Vertical.
- Main Editor:** Shows a "Default Question Block" containing a question "Q1" with the text "Click to write the question text" and three choices: "Click to write Choice 1", "Click to write Choice 2", and "Click to write Choice 3". Below the question block is an "Add Block" button. At the bottom of the editor, there is an "End of Survey" section with the text "We thank you for your time spent to" and "Your response has been re".
- Context Menu:** A menu is open over the question block, listing actions: Add block below, Move block, Copy, Lock, Delete, Collapse questions, Preview block, View block in survey flow, and Copy block to library. A pink arrow points to the three-dot menu icon that triggered this menu.
- ExpertReview score:** Great.

# Questions

- The default question option is multiple choice
- You can change how many choices participants will have and if they can choose more than one answer
- You can click “edit multiple” to avoid having to type each answer one at a time (copy and paste answers directly from a word document)
- You can add requirements to force participants to answer the question

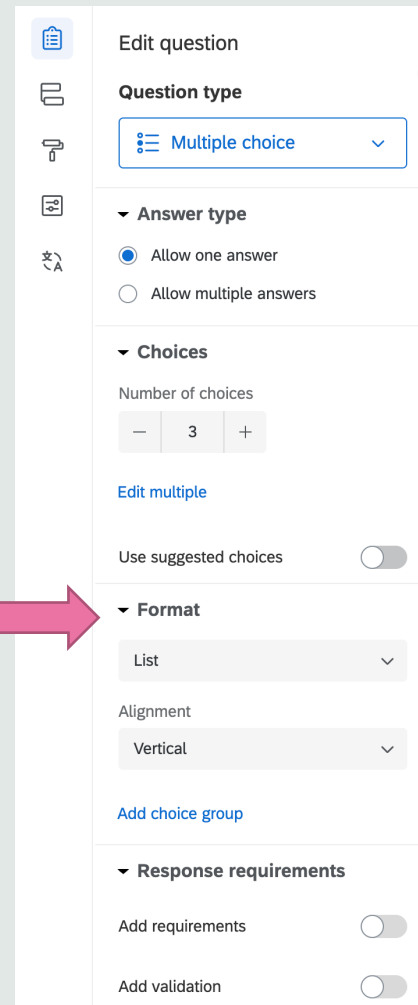
The image shows a 'Edit question' settings panel with several sections. Pink arrows point to the following elements:

- Question type:** A dropdown menu set to 'Multiple choice'.
- Answer type:** Radio buttons for 'Allow one answer' (selected) and 'Allow multiple answers'.
- Choices:** A 'Number of choices' input field set to '3', and a blue 'Edit multiple' link.
- Format:** A dropdown menu set to 'List' and another set to 'Vertical'.
- Response requirements:** A toggle switch for 'Add requirements'.

Other visible options include 'Use suggested choices' (toggle), 'Add choice group' (link), and 'Add validation' (toggle).

# Questions (cont'd)

- Formatting allows you to change how items are displayed in the survey (e.g., drop down box, list, select box). It also allows you to choose whether you want answers displayed vertically, horizontally, or in a column
- Question type allows you to change the type of questions asked (I recommend using a slider for any questions requiring a number, such as age, number of alcoholic drinks per week, etc. This will make cleaning the data much easier)



**Edit question**

**Question type**  
Multiple choice

**Answer type**  
 Allow one answer  
 Allow multiple answers

**Choices**  
Number of choices: - 3 +  
[Edit multiple](#)  
Use suggested choices:

**Format**  
List  
Alignment: Vertical

[Add choice group](#)

**Response requirements**  
Add requirements:   
Add validation:

## Edit question

### Question type

Multiple choice

Multiple choice

Text entry

Text / Graphic

Matrix table

Slider

Form field

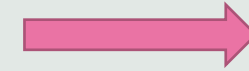
Rank order

Side by side

NPS Net promoter score

# Questions (cont'd)

- To access other question types, click where it says "multiple choice" on the left-hand side of the screen
- Text entry: participants will type their response
- Text/graphic: participants will be shown either text or an image without an option to respond
- Matrix table: for Likert-type scales
- Slider: sliding scale responses
- Captcha verification: to remove bots
- And many more
- Can select "timing" to record how long participant spends on a page, to make page auto-advance after a certain length of time, or delay when a participant can proceed



Edit question

Question type

Multiple choice

Multiple choice

Text entry

Text / Graphic

Matrix table

Slider

Form field

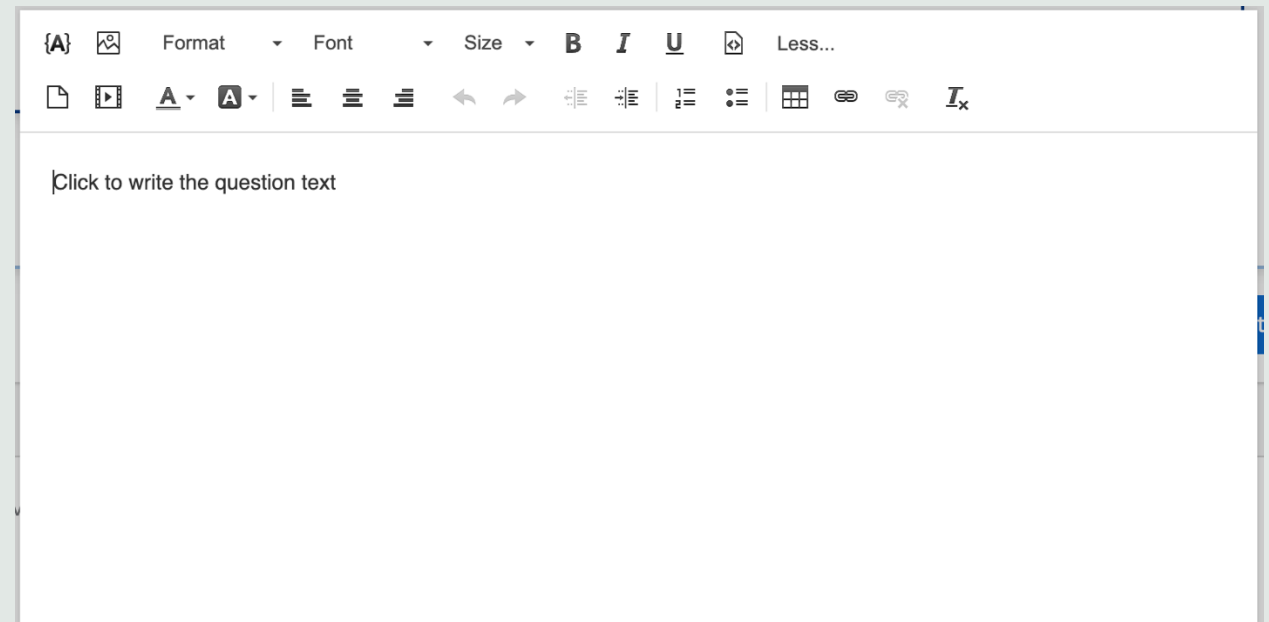
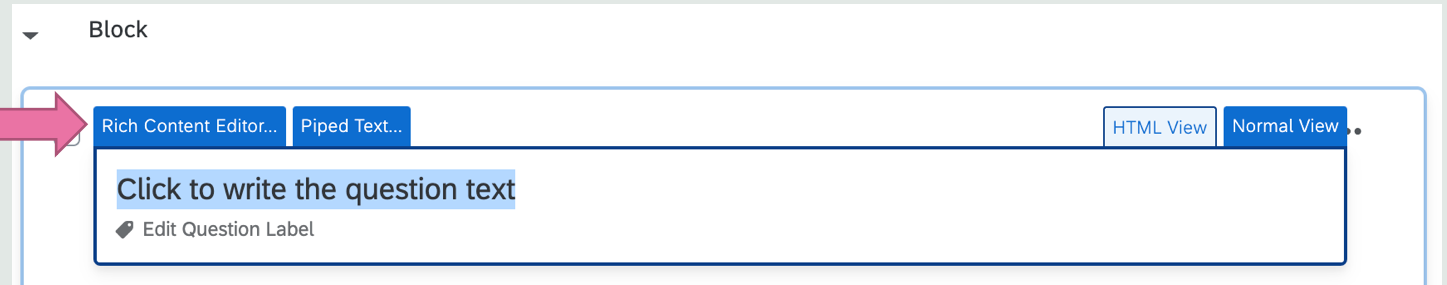
Rank order

Side by side

NPS Net promoter score

# *Important Features*

- Rich Content Editor: When you begin to type in the content you want for your question, you will see the option for this
- Here you can change font size or type, create bulleted lists, insert photos and videos, and more



# *Important Features (cont'd)*

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Question Behaviors (on left-hand side of Qualtrics screen):

- Display logic - choose when you want a question shown
- Skip logic - choose when you want a question skipped
- Choice randomization - choose if you want the answer choices to stay in the same order
- Recode values - customize how you want values scored (makes data cleaning much easier)

## ▼ Question behavior

 Display logic

 Skip logic

 Carry forward choices

 Choice randomization

 Recode values

Default choices

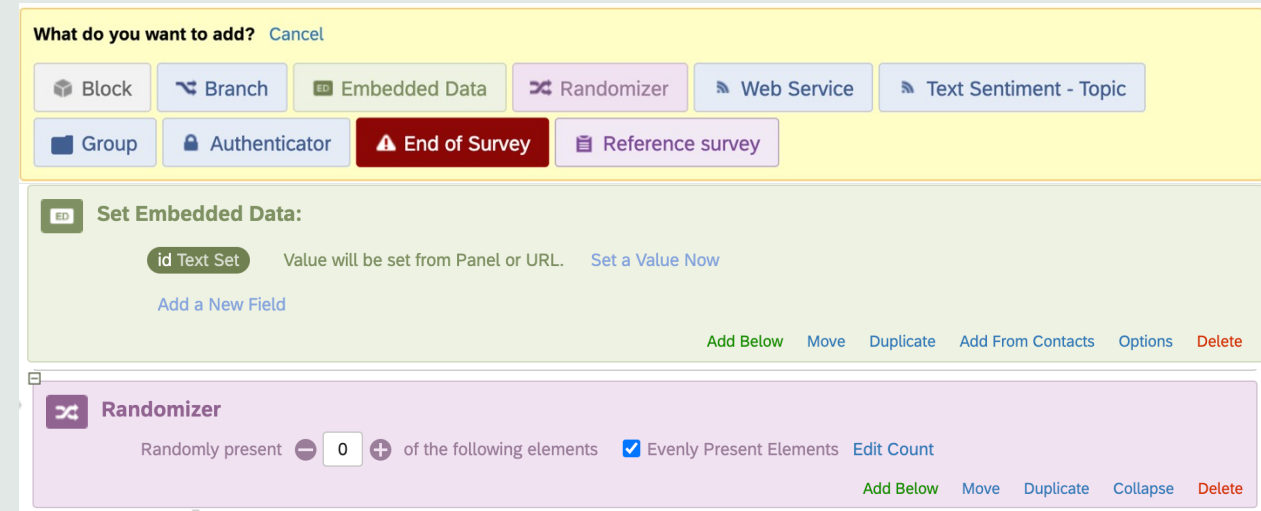
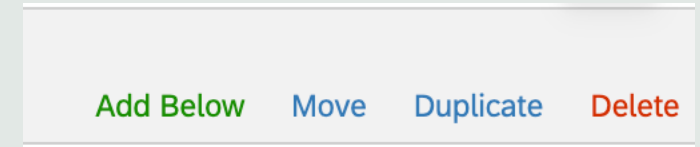
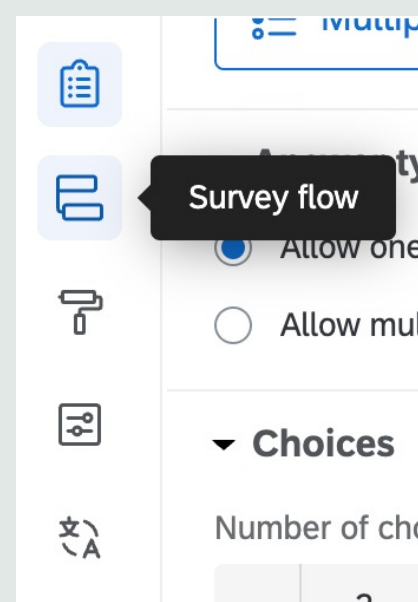
 JavaScript



# Important Features (cont'd)

## Survey Flow

- Allows you to change the order of your blocks and create different conditions
- Embedded data - used to create conditions (including creating and setting values for groups)
- Branch - you can have participants "branch" of into different conditions, depending on which group they are assigned to
- Randomizer - allows you to randomize order of what participants see



# Collaborations

- Allows you to share your survey with other researchers to allow editing, etc.
- Type in their Qualtrics username or email, then add them
- After you do this, you will be given the options of what they are allowed to do with your survey (i.e., edit, view reports, activate/deactivate, copy, and distribute) with different check boxes

Project name 12	Status	Responses	Type	Owner	Last modified	Creation date
☆  Doyle & Frank (2016)	Active	45	Survey	amthom68 amthom68	Aug 22, 2022	Aug 18, 2022
☆  Fusaroli et al., 2014	Active	27	Survey	amthom68 amthom68	Aug 22, 2022	Aug 17, 2022
☆  SAM Lab Example	New	—	Survey	Me		
☆  Sona Quizzes	—	—	Folder	—		
☆  Thesis Survey	—	—	Folder	—		
☆  Touch Projects	—	—	Folder	—		
☆  Untitled project	New	—	Survey	Me		

< 1 of 1 >

Activate

Collaborate

Rename project

Copy project

Move to...

Edit survey

Preview survey

Translate survey

Distribute survey

Data & Analysis

View reports

Delete project

Collaborate on Project: SAM Lab Example

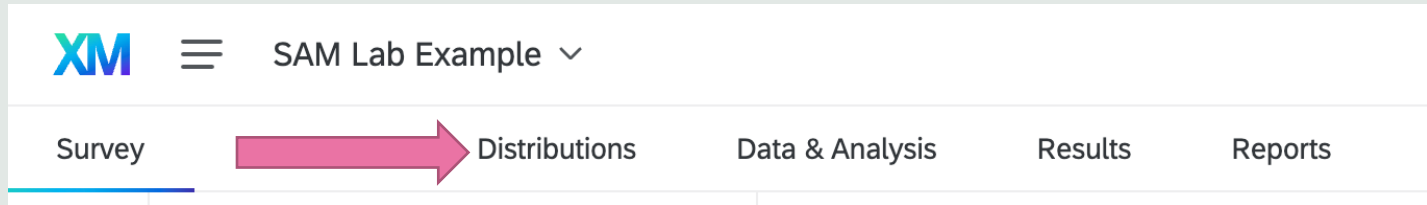
Person  Add [User and Group Address Book](#)

No results

User	Edit	View Reports	Activate/Deactivate	Copy	Distribute
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Cancel

# Distributions



- To distribute survey, go to “distributions” at the top of the survey page
- The most common way to distribute is via “Get a single reusable link”

How do you want to distribute your survey?

The diagram illustrates the distribution options for a survey. It features five main categories: Email, Web, Social, Mobile, and Online panel. A callout box for the 'Email' category is shown, divided into two sections: 'Send with Qualtrics' and 'Use your own email system'. Under 'Send with Qualtrics', there is a 'Compose Email' button. Under 'Use your own email system', there are two buttons: 'Get a single reusable link' and 'Generate a trackable link for each contact'. A pink arrow points from the 'Compose Email' button to the 'Get a single reusable link' button, indicating the recommended path.

# *Linking with Sona*

- Sona is ASU's research participation system

In Sona:

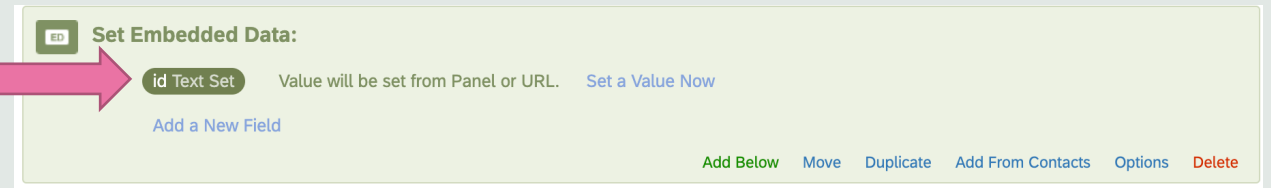
- Copy the link to your survey, and paste it in Sona under Direct Study Link in Study Information
- In Sona, under the study information, add "?id=%SURVEY\_CODE%" to the end of your URL

Additional Study Information	
Participant Sign-Up Deadline	0 hours before the study is to occur
Participant Cancellation Deadline	0 hours before the study is to occur
IRB Approval Code	N/A (expires January 1, 2023)
Direct Study Link	<a href="https://asuw.sona-systems.com/default.aspx?p_re">https://asuw.sona-systems.com/default.aspx?p_re</a> This is a direct URL for participants to access the study. You may use this in an email or study advertisement.
Date Created	January 26, 2017

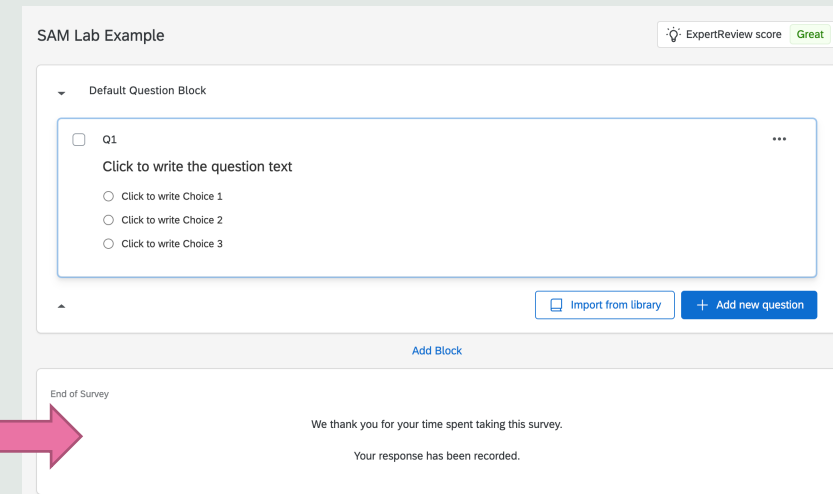
# Linking with Sona (cont'd)

In Qualtrics:

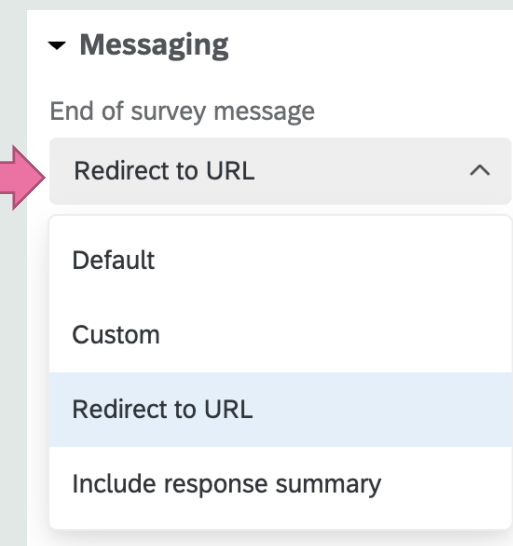
- In your survey flow in Qualtrics, add an embedded data block, where it says “create a new field-type id”
- At the end of your survey, you will see a block called “End of Survey”
- When you click it, you will see the option to change the end of survey message
- Select “redirect to URL”



ED Set Embedded Data: Value will be set from Panel or URL. [Set a Value Now](#)  
Add a New Field  
Add Below Move Duplicate Add From Contacts Options Delete



SAM Lab Example ExpertReview score Great  
Default Question Block  
Q1  
Click to write the question text  
Click to write Choice 1  
Click to write Choice 2  
Click to write Choice 3  
Import from library Add new question  
Add Block  
End of Survey  
We thank you for your time spent taking this survey.  
Your response has been recorded.



▼ Messaging  
End of survey message  
Redirect to URL  
Default  
Custom  
Redirect to URL  
Include response summary

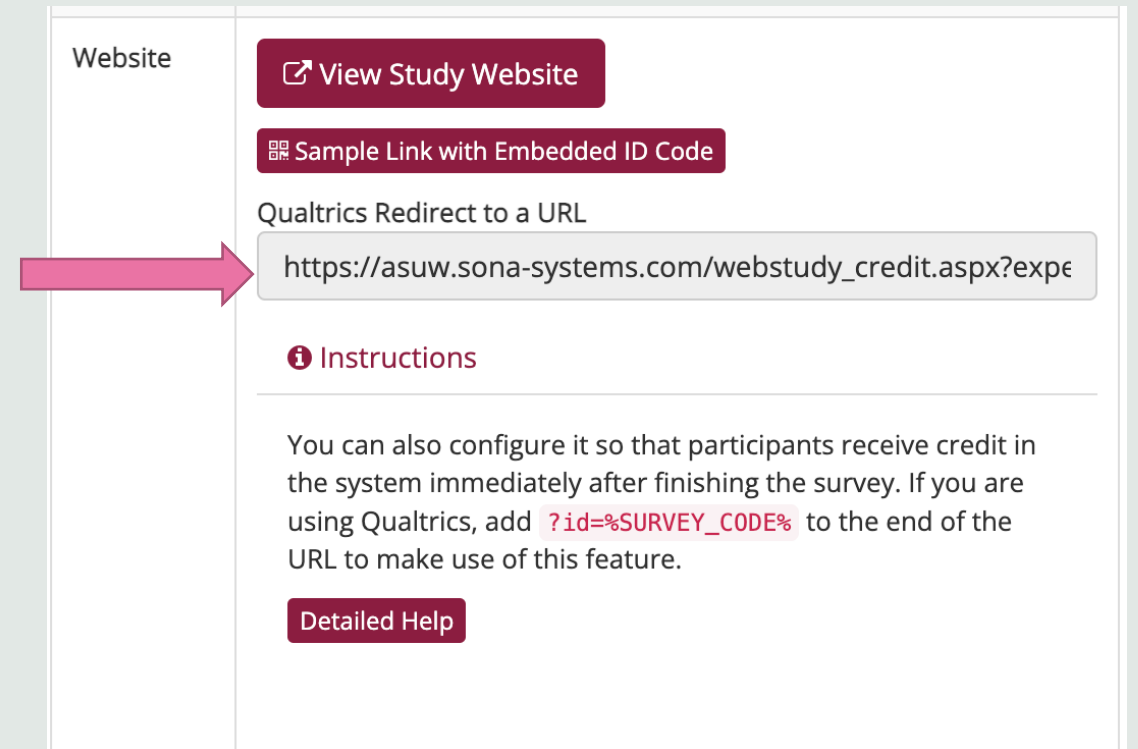
# Linking with Sona (cont'd)

Back on Sona Study Page:

- Copy link from where it says "Qualtrics Redirect to a URL"

Back in Qualtrics:

- Paste that link to the Website URL
- We can also do this in Prolific or Mturk - if you would like information on how to do that, please schedule an appointment with the SAM lab



Website

[View Study Website](#)

[Sample Link with Embedded ID Code](#)

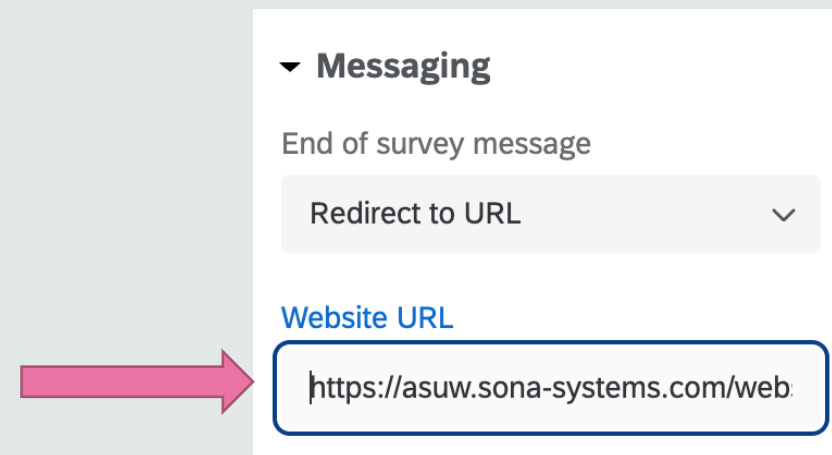
Qualtrics Redirect to a URL

[https://asuw.sona-systems.com/webstudy\\_credit.aspx?expe](https://asuw.sona-systems.com/webstudy_credit.aspx?expe)

[Instructions](#)

You can also configure it so that participants receive credit in the system immediately after finishing the survey. If you are using Qualtrics, add `?id=%SURVEY_CODE%` to the end of the URL to make use of this feature.

[Detailed Help](#)



▼ **Messaging**

End of survey message

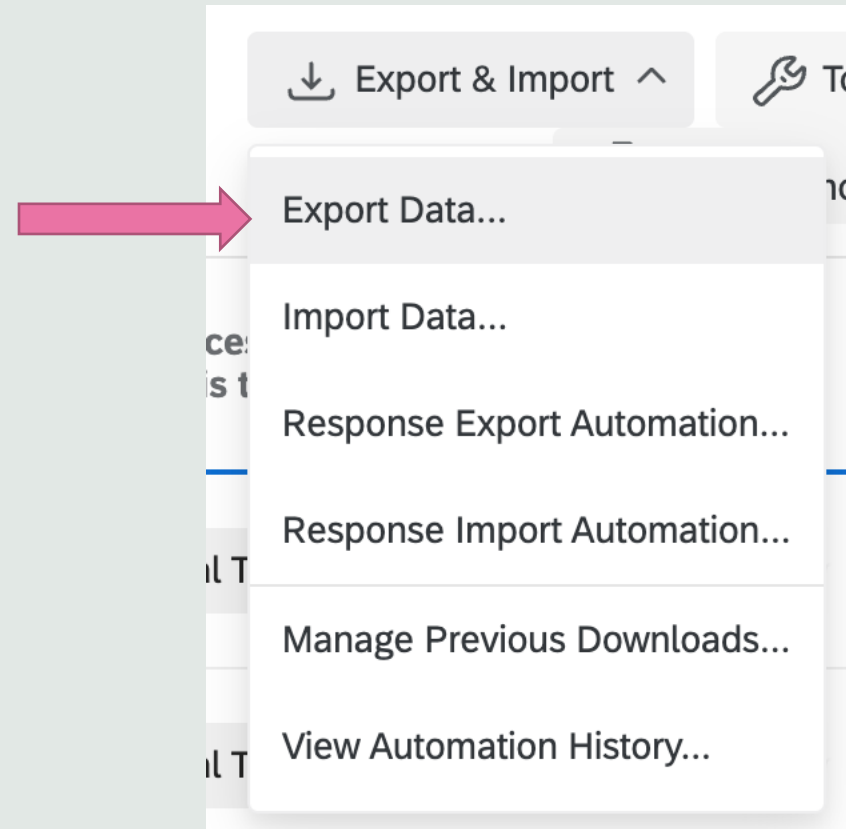
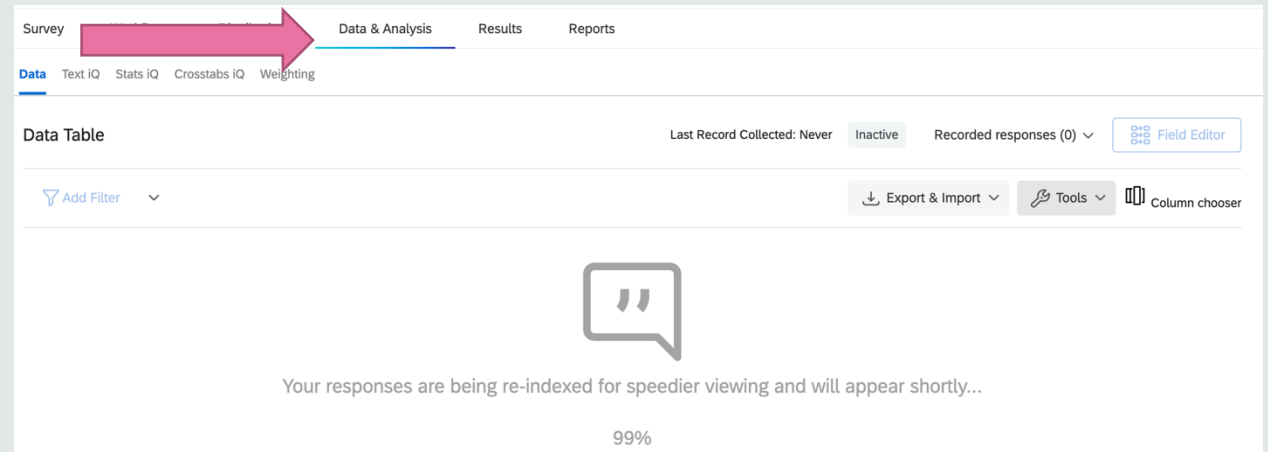
Redirect to URL

**Website URL**

<https://asuw.sona-systems.com/web>

# Viewing and Exploring Data

- To view and export data, click “Data & Analyses” at the top of the screen
- This often takes a little while to load – do not be discouraged! It will show up



# Data Tables

- After hitting “export” (see previous slide), you will be able to download a data table. You can choose whichever format you’d like for the download

## Download a data table

CSV   TSV   Excel   XML   **SPSS**   Google Drive   User-submitted files   Tableau

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### 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

[More options](#)   [Cancel](#)   [Download](#)



# *Tips*

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- Survey auto-saves and updates in real time
- You can save blocks and questions to your library for future use
- Always name your blocks as well as your question! This makes data collection, cleaning, and calculating easier and more organized
- Use sliders when asking for questions that have a number as a response

*Thank you!*

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STATISTICS AND METHODS

**SAM LAB**

ARIZONA STATE UNIVERSITY