



INTRODUCTION TO SURVEY PLATFORMS

SAM Lab

Arizona State University, West

Roadmap

1. We will cover the basics Qualtrics first
-How to create a survey, survey flow

2. How to connect Qualtrics to SONA, view your data

3. Linking Qualtrics to Prolific, how to navigate Prolific

What is
Qualtrics?

Qualtrics is a survey
program provided to
ASU students for free

You can access your
Qualtrics account by
signing in using your
ASUID

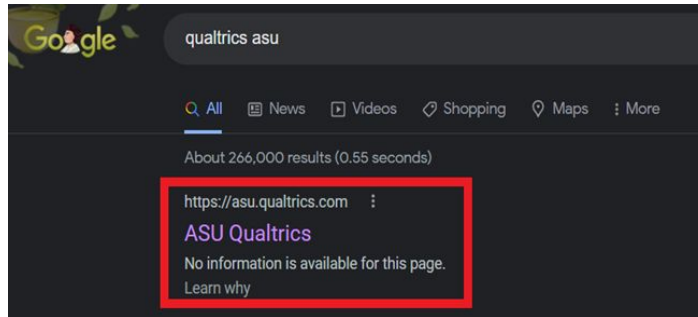
Why use Qualtrics?

Can link with SONA research participation system or Amazon MTurk

Can work collaboratively on surveys with your advisor, peers

Has great and quick tech support

How to begin



- Log in to Qualtrics using your ASUID
- You cannot log in through the regular Qualtrics website
 - I recommend looking up “ASU Qualtrics” and after signing in, bookmarking the page.

Dashboard

The screenshot shows the XM Projects dashboard. On the left is a sidebar with navigation options: 'Starred' (1), 'Shared with me' (5), 'Your folders' (including 'Projects and Programs' with 17 items, 'First Year Project' with 2, 'Legal Bias' with 8, and 'Scales' with 1), and 'All Project Types' and 'All Statuses' filters. The main area displays a table of projects under the 'Legal Bias' folder. A search bar and a 'Create project' button are also visible. Three callout boxes with arrows point to specific elements: 'Your folders (you can create these to organize)' points to the 'Legal Bias' folder; 'Your prior/current studies' points to the first project row; and 'To create a new project.' points to the 'Create project' button.

XM Projects

☆ Starred 1 You're currently previewing the new Home and Projects page experience. [Switch back](#) or [Leave Feedback](#)

▶ Shared with me 5 Projects and Programs > Legal Bias

Your folders

- ▼ Projects and Programs 17
- First Year Project 2
- Legal Bias 8
- Scales 1

All Project Types ▾ All Statuses ▾

Search...

Create project

Project name	Status	Responses	Type	Owner	Last modified †	Creation date	
☆ Pilot for Ambiguous Vignette -Round Two	Active	55	Survey	Me	Oct 6, 2021	Mar 17, 2021	...
☆ Legal Bias Moral Credentialing Study 2	Active	236	Survey	Me	Oct 6, 2021	May 14, 2021	...
☆ Pilot for Weak and Ambiguous Vignettes-Round Two	Active	47	Survey	Me	Oct 6, 2021	Sep 13, 2021	...

Your folders (you can create these to organize).

Your prior/current studies

To create a new project.

For our purposes, choose projects from scratch

The screenshot displays the XM Catalog interface. At the top left is the XM logo and a menu icon. At the top right are icons for help, notifications, and user profile. The main heading is 'Catalog', followed by a search bar containing the text 'Search the catalog'. Below the search bar are filter tabs: 'All' (highlighted in blue), 'CoreXM & DesignXM', 'CustomerXM', 'ProductXM', and 'BrandXM'. The 'Projects from scratch' section features a 'Survey' button with a clipboard icon and a large brown arrow pointing left towards it. The 'Guided projects' section includes a 'See all' button and a sub-heading 'Start building using a pre-build solution with step-by-step guidance'. Below this are four project cards: 'Customer Satisfaction (CSAT)' with a heart icon, 'Relationship NPS' with a heart icon, 'Touchpoint NPS (Transactional NPS)' with the text 'NPS', and 'Transactional Customer Effort Score (CES)' with a double-headed arrow icon.

XM

Catalog

Search the catalog

All CoreXM & DesignXM CustomerXM ProductXM BrandXM

Projects from scratch

Survey

Guided projects

See all

Start building using a pre-build solution with step-by-step guidance

Customer Satisfaction (CSAT)
Measure how happy consumers are with your products and services

Relationship NPS
Use Net Promoter Score to optimize the relationship between you and your customers

NPS
Touchpoint NPS (Transactional NPS)
Collect customer feedback about a particular touchpoint

Transactional Customer Effort Score (CES)
Assess how much effort was required to use one of your products or services

Create a new project

Survey

Name

Untitled project

Folder

All Projects and Programs



How do you want to start your survey?

Create a blank survey project



Create project

Cancel

Name your project something informative.

For our purposes, choose this option- Qualtrics does have templates you can use in the future.

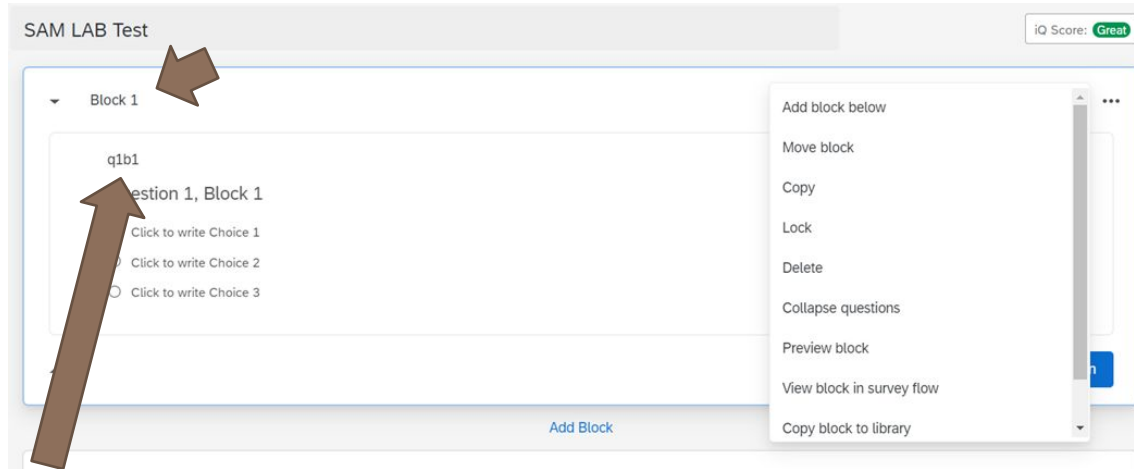
If you created a folder, you could choose a destination.

This is what you should see. We will break this interface down piece by piece.

The screenshot displays the XM Survey editor interface for a survey titled "SAM LAB Test". The interface is divided into several sections:

- Header:** Includes the XM logo, a menu icon, the survey title "SAM LAB Test", and utility icons for help, notifications, and user profile.
- Navigation:** A horizontal menu with tabs for "Survey", "Workflows", "Distributions", "Data & Analysis", and "Reports".
- Left Panel (Configuration):**
 - Edit question:** Shows the current question type as "Multiple choice".
 - Question type:** A dropdown menu currently set to "Multiple choice".
 - Answer type:** Radio buttons for "Allow one answer" (selected) and "Allow multiple answers".
 - Choices:** A section for "Number of choices" with a numeric input set to "3" and "Edit multiple" options.
 - Format:** Options for "List" and "Alignment" (set to "Vertical").
- Main Editor Area:**
 - Tools:** Includes a search icon, "Preview", and "Publish" buttons.
 - Survey Title:** "SAM LAB Test" with an "iQ Score: Great" indicator.
 - Default Question Block:** A large text area for editing the question. It contains a question ID "Q1" and a placeholder "Click to write the question text". Below it are three choice placeholders: "Click to write Choice 1", "Click to write Choice 2", and "Click to write Choice 3".
 - Buttons:** "Import from library" and "Add new question" buttons are located at the bottom right of the question block.
 - Add Block:** A button to add new question blocks.
 - End of Survey:** A section for the survey conclusion, containing the text: "We thank you for your time spent taking this survey." and "Your response has been recorded."

You can name your block.



You can name each question. It is crucial you name it something informative, as this is what the column will be named when you export and view your data.

Blocks

- Think of blocks as the outline of your survey
- Each block is a new page in your survey
- Clicking those 3 little dots in the corner gives you the option to preview, move, or delete the block

Questions

- The default is multiple choice.
- You can change how many choices a participant will get, or if they are allowed to choose more than one answer.
- Edit multiple allows you to change multiple answers at once, otherwise you have to do it one by one within the block.
- Formatting lets you change the display.

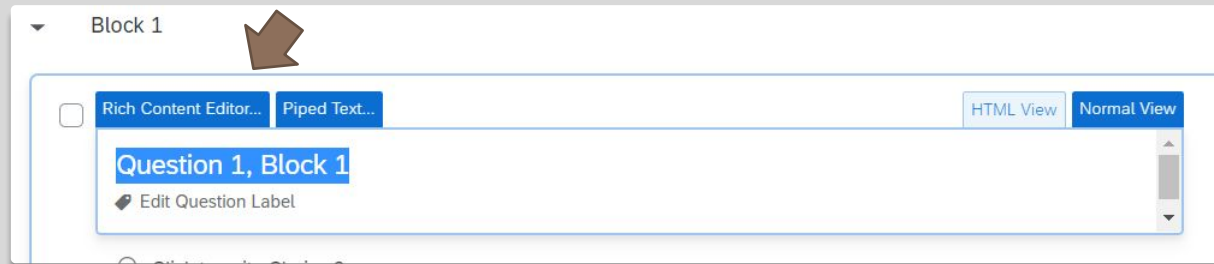
The image shows a 'Edit question' settings panel. At the top, it says 'Edit question'. Below that is a 'Question type' dropdown menu set to 'Multiple choice'. Underneath is a section for 'Answer type' with two radio buttons: 'Allow one answer' (selected) and 'Allow multiple answers'. The next section is 'Choices', which includes a 'Number of choices' input field set to '3' with minus and plus buttons. Below that is a link for 'Edit multiple' and a toggle for 'Use suggested choices' which is currently turned off. The final section is 'Format', which has a dropdown menu set to 'List' and an 'Alignment' dropdown menu set to 'Vertical'.

Question Types

- Other options include(click the drop-down arrow where it says “Multiple Choice”):
 - Text Entry: Participants will type their response, you can choose how long
 - Text Graphic: Participants will be shown either text or an image, no where to respond
 - Matrix Table: For Likert style scales
 - Slider: Sliding scale responses
 - Captcha: To remove bots
 - Timing
 - Can record how long a participant spends on a page
 - Can make a page auto-advance after a certain time period, or delay when a participant can proceed
 - Great if you have long instructions/videos/vignettes you want to make sure participants read!

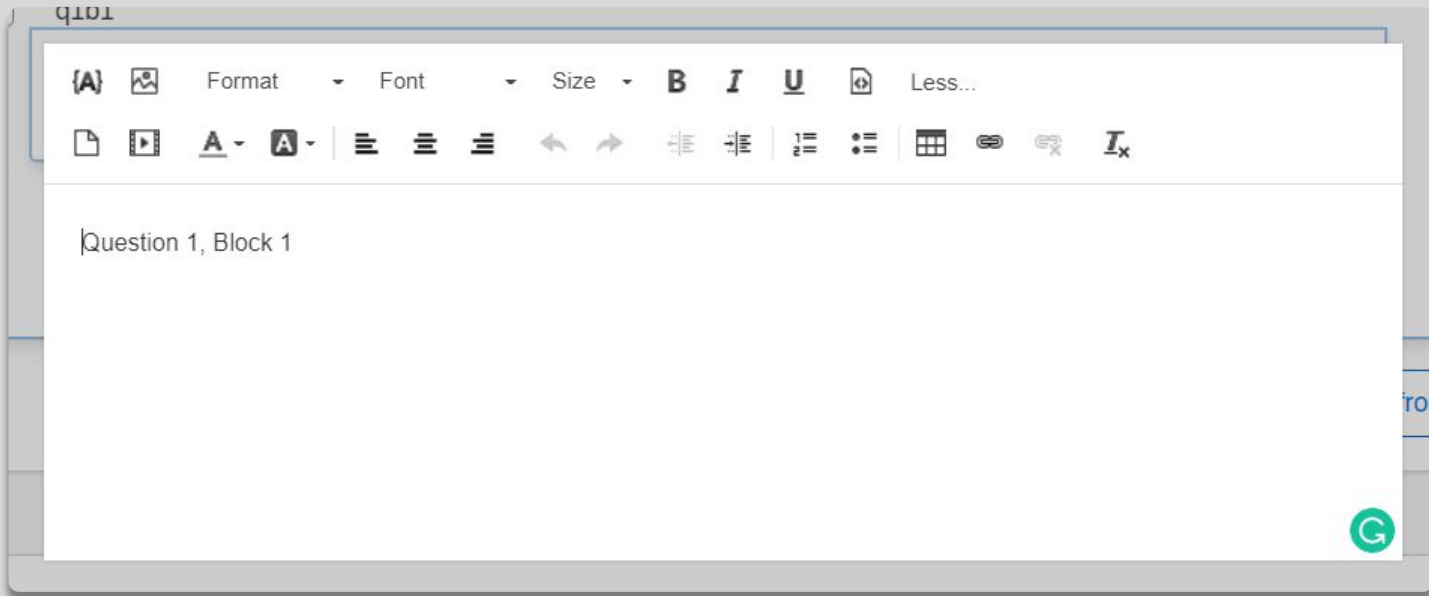
Important Features: Rich Content Editor

- When you begin to type in the content you want for your question, you will see the option for rich content editor



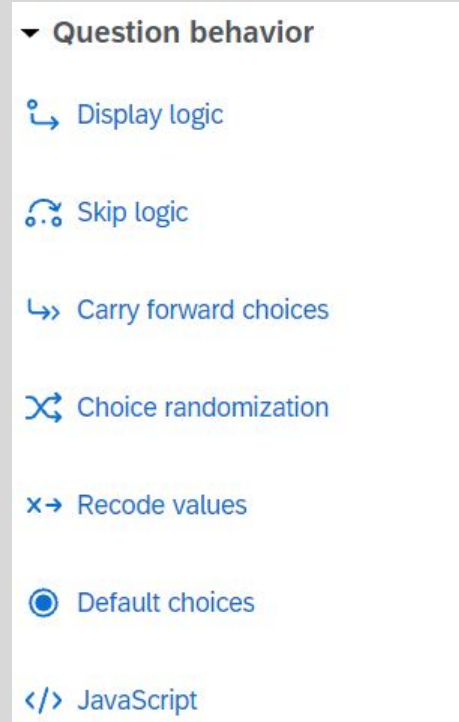
Rich Content Editor

- You change font size, type, format, create bulleted lists, insert photos/videos.



Important Features: Logic

- Survey Logic is designed to help create conditions
- Display logic allows you to choose what a participant sees (e.g., if a participant chooses a certain answer on that question, they get a different following question)
- Skip logic allows you to have a participant skip questions or end early if they answer questions a certain way
- Choice randomization allows answer choices to be presented in a different order each time



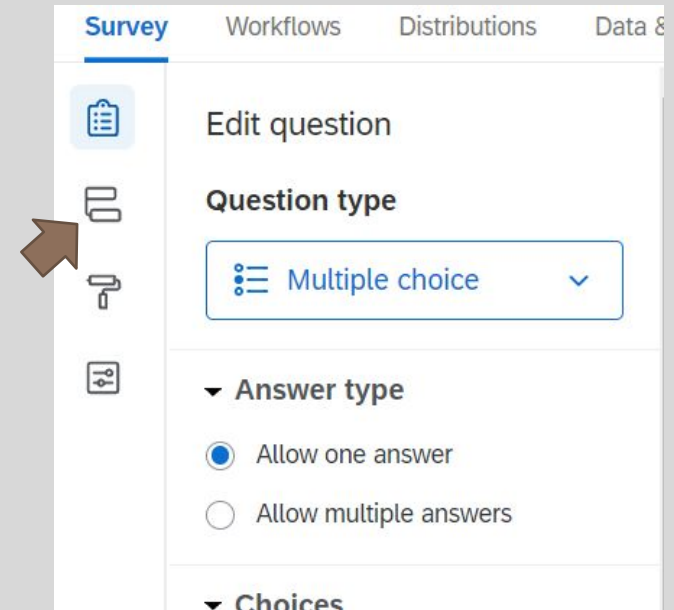
Important Features: Survey Flow

Survey Flow allows you to change the order of your blocks and create different conditions for different participants.

Embedded Data: Used to create conditions. You can name the "group" then set a value for that group.

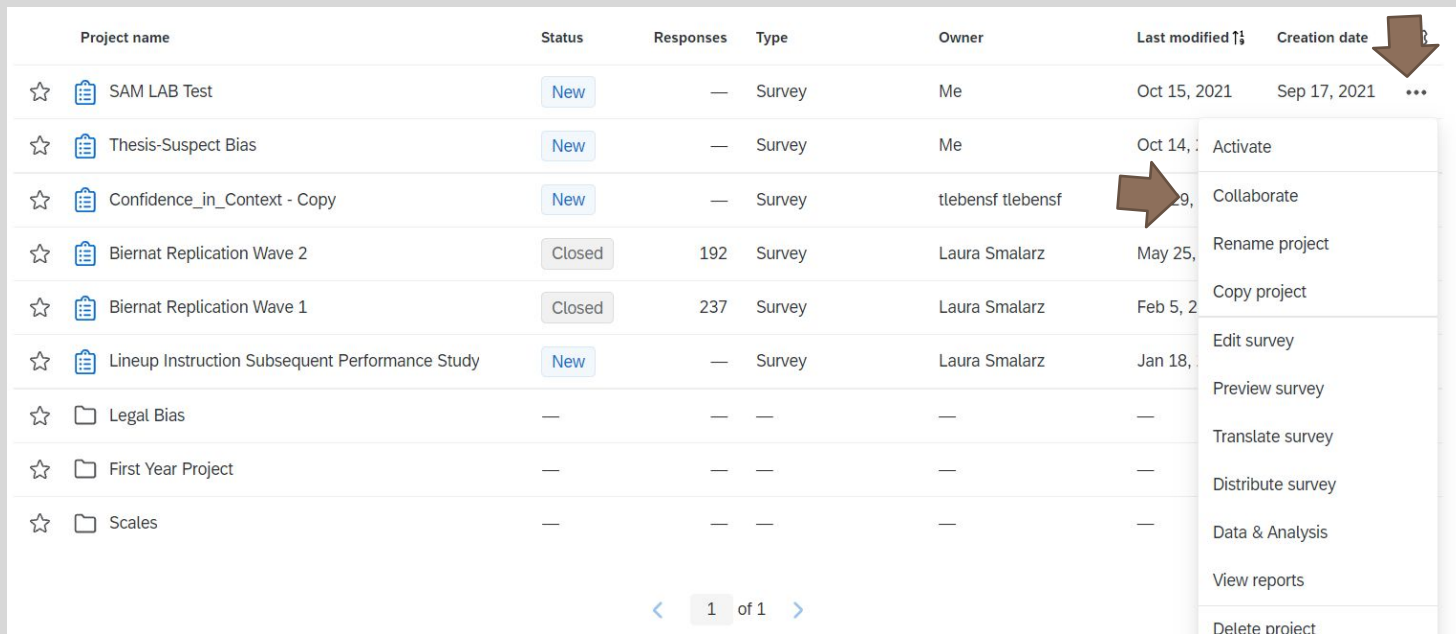
Branch: You can have participants "branch" off into different conditions, depending on what group they are assigned to. Such as if "group" equals "1", they get a certain condition.










Randomizer: Allows you to randomize the order of what participants see.



Collaborating

Once you have created a project, you can go back to your dashboard. You can click these three little dots.



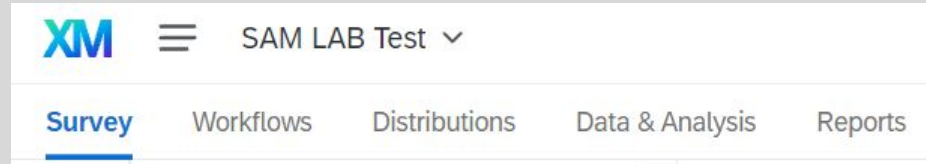
Project name	Status	Responses	Type	Owner	Last modified ↑↓	Creation date	
☆  SAM LAB Test	New	—	Survey	Me	Oct 15, 2021	Sep 17, 2021	⋮
☆  Thesis-Suspect Bias	New	—	Survey	Me	Oct 14, 2021		Activate
☆  Confidence_in_Context - Copy	New	—	Survey	tlebensf tlebensf	Oct 14, 2021		Collaborate
☆  Biernat Replication Wave 2	Closed	192	Survey	Laura Smalarz	May 25, 2021		Rename project
☆  Biernat Replication Wave 1	Closed	237	Survey	Laura Smalarz	Feb 5, 2021		Copy project
☆  Lineup Instruction Subsequent Performance Study	New	—	Survey	Laura Smalarz	Jan 18, 2021		Edit survey
☆  Legal Bias	—	—	—	—	—		Preview survey
☆  First Year Project	—	—	—	—	—		Translate survey
☆  Scales	—	—	—	—	—		Distribute survey

< 1 of 1 >

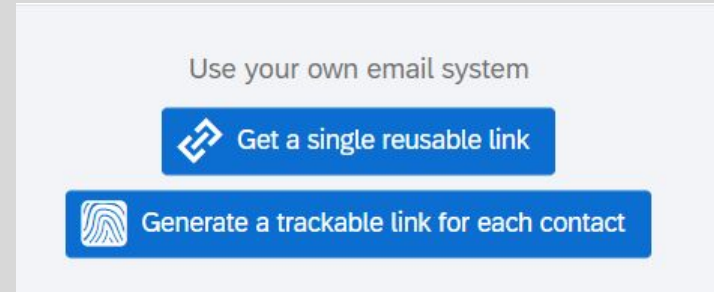
- Data & Analysis
- View reports
- Delete project

Distributions

- To distribute your survey, go to “Distributions”



- The most common way to distribute your survey is via “Get a single reusable link”



Linking Qualtrics to SONA

- Most of you will want to take advantage of ASU's research participation system, SONA.
- In your survey flow, add an embedded data block, where it says create a new field- type "id"



ED **Set Embedded Data:**

id 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](#)

Linking Qualtrics to SONA

- Copy your link to your survey under distributions, and paste it in SONA
 - Study Information->Study URL
- In SONA, still under study information, add “?id=%SURVEY_CODE%” to the end of your IRL.

```
https://asu.co1.qualtrics.com/jfe/form/SV_c13kiWxl4ZxFP0?id=%SURVEY_CODE%
```

If the text `%SURVEY_CODE%` is included in the URL, the system will replace that with a unique code for the participant, to make it easier to identify who completed the study. 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.

Edit end of survey

Tools ▾

Saved at 10:11 AM

Draft



Preview

Publish

▼ Messaging

End of survey message

Default

Default

Custom

Redirect to URL

Include response summary



Click to write Choice 2

Click to write Choice 3

Import from library

+ Add new question

Add Block

Then click here.

End of Survey

We thank you for your time spent taking this survey.

Your response has been recorded.



Click this box at the end of your survey.

Back in SONA, copy this link.

Edit end of survey

▼ Messaging

End of survey message

Redirect to URL



Website URL

http://

ⓘ Invalid URL

Website

[View Study Website](#)

[Sample Link with Embedded ID Code](#)

Qualtrics Redirect to a URL

https://asuw.sona-systems.com/webstudy_credit.aspx?exper

ⓘ 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](#)



Paste it here.

Linking Qualtrics to SONA

- Your end of the survey should now look like this:

End of Survey

(Respondents will be redirected to https://asuw.sona-systems.com/webstudy_credit.aspx?experiment_id=355&credit_token=7cf6f70d2f69451d80db20c)

Viewing / Exporting Data

The screenshot shows a web interface for survey data analysis. At the top, there are navigation tabs: Survey, Workflows, Distributions, **Data & Analysis**, and Reports. Below this, there are sub-tabs: **Data**, Text IQ, Stats IQ, Crosstabs, and Weighting. A brown arrow points to the **Data** sub-tab. On the left side, there are two dropdown menus: "Add Filter" and "With Selected". On the right side, there are statistics: "Recorded Responses ..." and "Responses in Progress 0". Below these are three buttons: "Export & Import" (with a download icon), "Edit", and "Tools" (with a magnifying glass icon). A dropdown menu is open under "Export & Import", showing options: "Export Data...", "Import Data...", "Response Export Automation...", "Response Import Automation...", "Manage Previous Downloads...", and "View Automation History...". A brown arrow points to the "Export & Import" button. In the center, there is a speech bubble icon and a text box that says "Click 'export data'". Below this, there is a message: "Your responses are being re-indexed for speedier viewing and will appear shortly..." followed by "0%".

Click here, it may take a moment for your survey results to appear.

Click "export data"

Your responses are being re-indexed for speedier viewing and will appear shortly...
0%

Recorded Responses ...
Responses in Progress 0

Export & Import

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

Download a data table

CSV

TSV

Excel

XML

SPSS

Google Drive

User-submitted files

Tableau



Comma separated values

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

[Learn more](#)

- Download all fields
- Use numeric values
- Use choice text

[More options](#)

Close

 Download

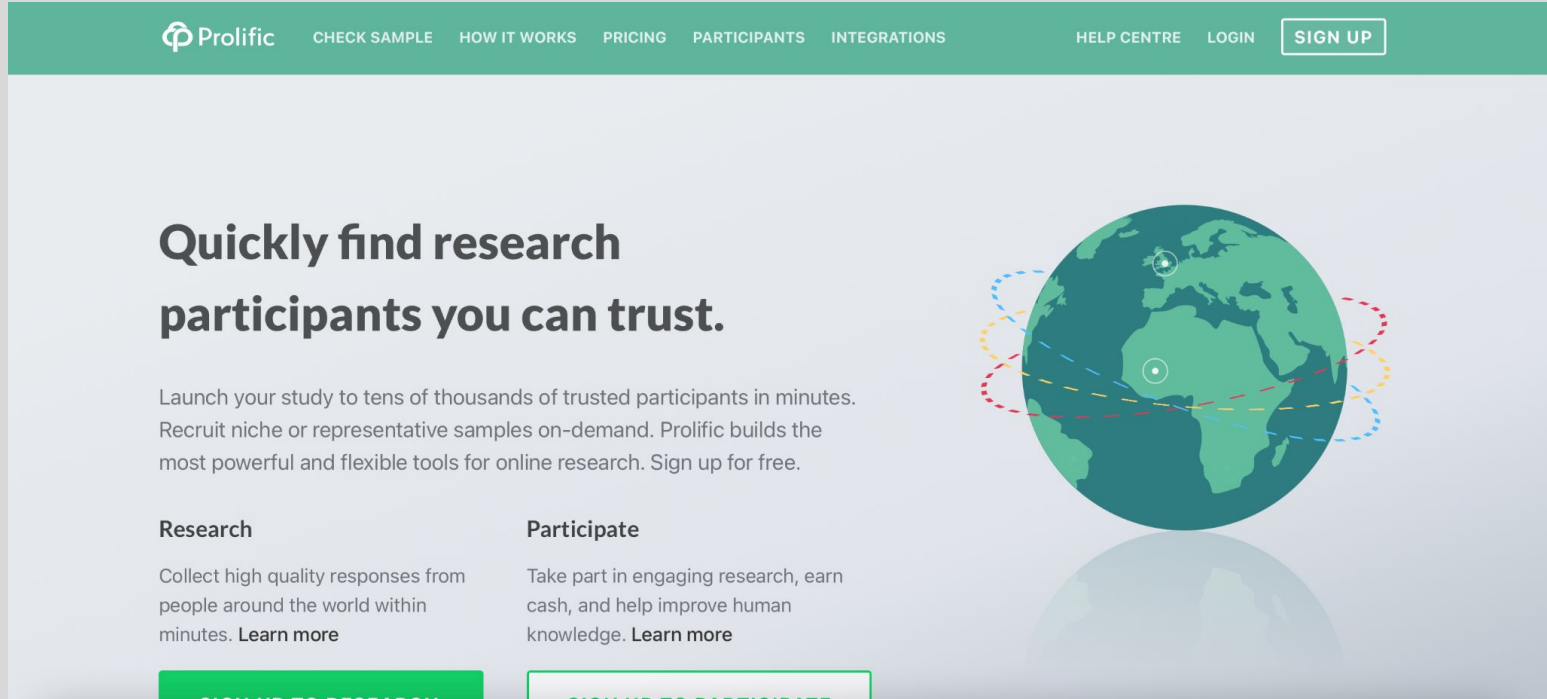
I recommend sticking with CSV. Can still use across Excel/SPSS etc.

This depends on whether your answers are numeric or text entry.

Tips

- Your survey auto-saves and updates in real time
- You can save blocks and questions to your library for future use
 - Great for scales, individual difference measures
- Always name your blocks, as well as your questions
 - This will make data collection, cleaning, and calculating organized

Linking Qualtrics Survey to Prolific

The image is a screenshot of the Prolific website's homepage. At the top, there is a green navigation bar with the Prolific logo on the left and several menu items: 'CHECK SAMPLE', 'HOW IT WORKS', 'PRICING', 'PARTICIPANTS', 'INTEGRATIONS', 'HELP CENTRE', 'LOGIN', and a 'SIGN UP' button. The main content area has a light blue background. On the left, there is a large heading 'Quickly find research participants you can trust.' followed by a paragraph of text. Below this, there are two columns: 'Research' and 'Participate', each with a short description and a 'Learn more' link. On the right side, there is a graphic of a globe with several colorful dashed lines orbiting it. At the bottom of the page, there are two green buttons: 'SIGN UP TO RESEARCH' and 'SIGN UP TO PARTICIPATE'.

Prolific CHECK SAMPLE HOW IT WORKS PRICING PARTICIPANTS INTEGRATIONS HELP CENTRE LOGIN **SIGN UP**

Quickly find research participants you can trust.

Launch your study to tens of thousands of trusted participants in minutes. Recruit niche or representative samples on-demand. Prolific builds the most powerful and flexible tools for online research. Sign up for free.

Research

Collect high quality responses from people around the world within minutes. [Learn more](#)

Participate

Take part in engaging research, earn cash, and help improve human knowledge. [Learn more](#)

SIGN UP TO RESEARCH **SIGN UP TO PARTICIPATE**

Dashboard

The screenshot shows the Prolific Researcher dashboard. The top navigation bar includes the Prolific logo, 'STUDIES', and 'MESSAGES'. On the right side of the top bar, there are links for 'Gift \$300. Refer a colleague now ->', 'HELP CENTRE', a balance indicator '\$11.09', and a user profile 'KG'. The left sidebar is titled 'RESEARCHER' and contains menu items: 'New study', 'Drafts', 'Scheduled', 'Active', and 'Completed'. The main content area displays 'You have no draft studies' with a central icon of a notepad. Below this are two buttons: 'Get a study quote' and 'Create a new study'. At the bottom, there is a link for 'First time here? Take a tour, watch a tutorial or check out our Help Centre'. Two callout boxes with arrows provide instructions: one points to the 'New study' button, and the other points to the account balance area.

RESEARCHER

- New study
- Drafts
- Scheduled
- Active
- Completed

Gift \$300. Refer a colleague now -> HELP CENTRE \$11.09 KG

To link your qualtrics survey and start collecting data

Where you will "top up" your account and add funds to pay participants

You have no draft studies

Get a study quote Create a new study

First time here? [Take a tour](#), [watch a tutorial](#) or check out our [Help Centre](#)

Creating a new study

RESEARCHER

- New study
- Drafts
- Scheduled
- Active
- Completed

STUDY DETAILS

What is the title of your study?

Give your study an internal name (only visible to you)

Describe what participants will be doing in this study. [Read our tips](#)

Which devices can participants use to take your study?

Mobile Tablet Desktop

Does your study require any of the following?

Audio Camera Microphone Download software

Add title

Brief description of survey for participants to see

Prolific requirements

What is the URL of your study?



https://my-awesome-ice-cream-study.com

How do you want to record Prolific IDs? *(Select an option below for instructions)*

- I'll add a question in my study
- I'll use URL parameters
- I don't need to record these

Add URL from
qualtrics survey

Add question in your study

STUDY COMPLETION

How to confirm participants have completed your study

When participants start your study they will leave the Prolific app. When they return, we need to capture a unique Completion Code to prove they completed your study.

[Read more about study completion](#)

How do you want to confirm participants have completed your study? *(Select an option below for instructions)*

- I'll redirect them using a URL
- I'll give them the Completion Code to copy & paste

Select completion code

Add questions to survey

Q2



Please enter your Prolific ID



Import from library



Add new question

Q64

Here is the Prolific completion code:



How to top up accounts

Top up your account ×

[Credit card](#) [Bank transfer](#) [Request invoice](#)

Card number

CVV

Expiration date

Credit Card Amount

\$ 0.00

Billing address

kaylyn graham

Company

Street Address

Address Line 2

Address Line 3

City

State

Postal Code

United States

Save these details for next time

Completed Surveys

 DV

COMPLETED

ACTION



19 Jan 2022, 14:40

Published



\$10.68/hr

Average reward per hour



4,853 of 141,885

Eligible Participants



100/100

Submissions Progress

✓ Approve all

✉ Message all

\$ Bonus payment all

🚩 Bulk report

Find by ID...

More



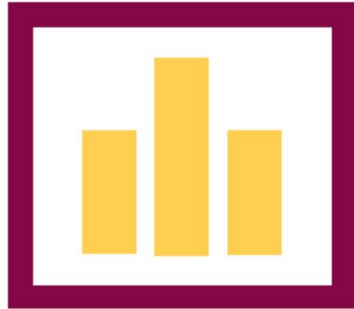
PARTICIPANT PROLIFIC ID

STARTED ↓

TIME TAKEN

COMPLETION CODE

STATUS ▾



STATISTICS AND METHODS

SAM LAB

ARIZONA STATE UNIVERSITY

THANK YOU!