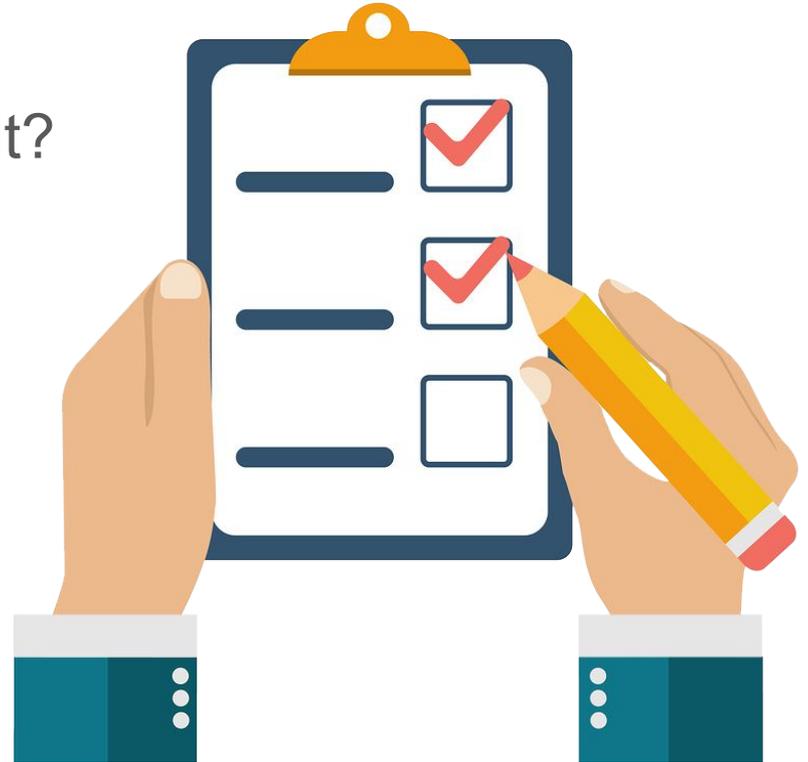


# Intro to Qualtrics

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# Agenda

- Introductions
- What is Qualtrics and why use it?
- Accessing Qualtrics
- Creating your survey
- Distributing your survey
- Post-data collection



# Introductions

- Name
- Department
- Why you're interested in using Qualtrics
- Favorite flavor of ice cream



# What is Qualtrics?

- Online survey tool to conduct surveys
- Point and click
- Free for Stanford affiliates through SSO



*Tabulating Census data, circle 1890*

# Why Use Qualtrics?

- Very powerful (especially compared to Google Forms)
  - More question types
    - E.g. rank order, slider, highlight, hot spot
  - Ability to validate questions
    - Ensure that respondent is providing certain response (e.g. zip code is numerical)
  - More customization with CSS and HTML
  - Extensive branching logic
    - Send respondents on different paths of the survey depending on their response



# Accessing Qualtrics

- Always use this link:  
<https://uit.stanford.edu/service/survey>
- Step 1: Use above link
- Step 2: Click “Launch Survey Tool”
- Step 3: Click “My organization’s single sign-on (SSO)”

Select how you would like to sign in

Qualtrics sign in page →

My organization's single sign-on (SSO) →

Stanford | University IT

Explore services ▾ I want to ... ▾ Log into ... ▾ View alerts 0 Get support ▾ | Q

## Survey Tool (Qualtrics)

Set up a Qualtrics account

Launch Survey Tool

The Qualtrics survey tool is an easy-to-use, full-featured, web-based tool for creating and conducting online surveys. The survey tool is available at

# **CREATING YOUR SURVEY**

# Creating a Survey

The screenshot shows the XM Projects dashboard. At the top left, there is a logo 'XM' and a menu icon. The main header area contains 'Projects and Programs' and a 'Create project' button highlighted with a green border. Below the header, there are filters for 'All project types' and 'All statuses', and a search bar. The main content area is a table with columns: Project name, Status, Responses, Type, Owner, Last modified, and Creation date.

The screenshot shows the 'Create a project' page in XM. The page has a search bar 'Search the catalog' and a sidebar with navigation options: 'Type', 'What you're measuring' (with sub-items: Customers, Employees, Markets, Students), and 'What you're measuring'. The main content area is titled 'Create a project' and has two sections: 'From scratch' with a 'Survey' button, and 'Guided projects' with the text 'Start building using a pre-built solution with step-by-step guidance'.

# Question Types

The screenshot displays the Qualtrics question editor interface. On the left, a sidebar titled "Edit question" shows a "Question type" dropdown menu with "Multiple choice" selected. Below this, a list of question types is visible: Multiple choice, Text entry, Text / Graphic, Matrix table, Slider, Form field, Rank order, Side by side, and NPS (Net promoter score). The main editor area shows a question titled "workshop\_demo" with a status of "Draft" and a save time of "9:27 AM". The question is a "Default Question Block" containing a multiple choice question labeled "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". At the bottom of the editor, there are buttons for "Import from library" and "Add new question", and a blue "Add Block" button. The top right corner features a search icon, "Preview" and "Publish" buttons, and an "ExpertReview score" indicator showing "Great".

- **Notable:** timing question allows you to track how long the respondent spent on that page
- **More info on question types:**  
<https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/question-types-overview/>

Let's try writing a  
question together!

# And another question and a page break...

The screenshot shows a user interface for editing a document. At the top, there is a dropdown menu labeled "Default Question Block" with a downward arrow on the left and a three-dot menu icon on the right. Below this, the content is organized into two distinct question blocks. Each block starts with a label "Q1" and "Q2" respectively, followed by a text prompt "Click to write the question text". Underneath each prompt are three radio button options, each labeled "Click to write Choice 1", "Click to write Choice 2", and "Click to write Choice 3". A blue button with a plus sign and the text "+ Add page break" is positioned between the two question blocks. At the bottom of the editor, there are two buttons: "Import from library" with a book icon and "+ Add new question" with a plus sign. The "+ Add new question" button is highlighted with a green border. Below the editor window, the text "Add Block" is centered.

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

+ Add page break

Q2

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

# Customizing Questions: Rich content editor and piped text

- **Rich content editor:** for adding pictures, downloadable documents, and changing font, color, etc. of questions
- **Piped text:** for summoning text from a previous question
- HTML view vs. normal view
  - Stick with normal view unless you have a particular need for editing the

Custom Validation

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Rich Content Editor... Piped Text... HTML View Normal View

Click to write the question text

 Edit Question Label

Click to write Choice 2

Click to write Choice 3

- Try using the rich content editor or inserting piped text

# Customizing Questions: Requirements and Validation

- Add requirements
  - Force response
  - Request response (optional question)
- Add validation
  - Respondent will not be able to proceed unless they select a particular answer
  -

**Custom Validation**

Validation will pass if the following condition is met:

Q1 Click to write the question text   ⊖ ⊕

Choose an error message to display on failure:

▼ **Response requirements**

Add requirements

Force response

Request response

Add validation

▼ **Question behavior**

Display logic

Skip logic

Carry forward choices

Choice randomization

Recode values

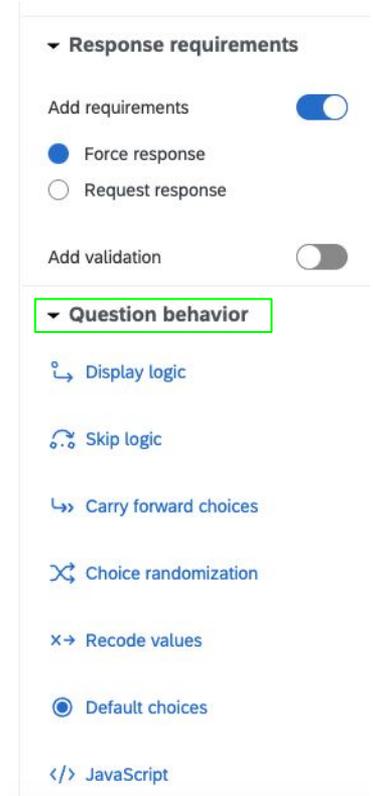
Default choices

JavaScript

- Try adding a requirement and validation

# Customizing Questions: Question behavior

- **Display/Skip logic:** Extremely useful for managing survey flow and attention check screeners
- **Carry forward choices:** Takes previously used options and displays them again
- **Default choices:** pre-populate answer choices when respondent opens the survey
- **Choice randomization:** Change the order of options
- **Recode values:** Change output value/variable labels (useful if exporting data to use in R, Stata, etc)
- **Javascript:** Advanced, but very useful
- Try adding one or more of the above



The image shows a screenshot of a survey configuration interface. It features two main sections: 'Response requirements' and 'Question behavior'. The 'Response requirements' section includes a toggle for 'Add requirements' (which is turned on), two radio buttons for 'Force response' (selected) and 'Request response', and a toggle for 'Add validation' (which is turned off). The 'Question behavior' section is highlighted with a green border and contains several options: 'Display logic', 'Skip logic', 'Carry forward choices', 'Choice randomization', 'Recode values', 'Default choices' (which is selected with a blue circle), and 'JavaScript'.

# Blocks

- Tool for organizing sets of questions



- Moving questions within blocks
  - Click and drag or:



# Look and feel (of entire survey)

The screenshot displays the 'Look and feel' configuration page for a survey. At the top, a navigation bar includes 'Survey', 'Workflows', 'Distributions', 'Data & Analysis', 'Results', and 'Reports'. The 'Survey' tab is active. Below the navigation bar, the page title is 'Look and feel' with a 'Draft' status indicator. A left-hand sidebar contains a list of settings: Theme, Layout, General, Style, Motion, Logo, and Background. The 'Theme' option is highlighted with a green box. The main content area is divided into two sections. The left section, titled 'Dynamic Themes', features a dropdown menu set to 'Stanford University' and three theme preview cards: 'Stanford' (a red header with the word 'Stanford'), 'Stanford Modern' (the word 'Stanford' next to a red square), and 'Stanford Wilbur'. The right section is a preview of the survey question, showing a red header with 'Stanford' and two question text prompts, each followed by three radio button choices labeled 'Click to write Choice 1', 'Click to write Choice 2', and 'Click to write Choice 3'. In the top right corner of the preview area, there are icons for desktop and mobile views, a refresh icon, and a dropdown menu labeled 'My Survey'.

# Look and feel: notable functions

- Dynamic themes: can remove Stanford branding
- Progress bar (general → progress bar)
- Motion: page transition animation, auto-advance to next page
- CSS (style → CSS)
  - CSS = Cascading Style Sheets
  - Advanced! You will rarely need to use this to customize your survey
  - Check out [w3schools.com](http://w3schools.com)
- Try changing one of the settings in look and feel

# Survey options

Survey Workflows Distributions Data & Analysis Results Reports

Options

General  
Language, title, survey description

Responses  
Survey expiration, incomplete responses, back button and more

Security  
Passwords, file uploads, bot detection and more

Post-Survey  
Thank you emails, completed survey messages, and triggers

Advanced

Scoring  
Attach point values to specific answers

Quotas  
Set conditions you want responses to meet

Saved at 10:15 AM **Draft**

Display name  
Enter a survey name to show in search results, social media posts, and on browser tabs.

Display name  
Qualtrics Survey | Qualtrics Experience Management

Survey description  
Enter a survey description to show in search results and on social media posts.

Survey description  
The most powerful, simple and trusted way to gather experience data. Start your journey to experience management and try a free account today.

Base language  
Your survey base language can be configured in the translations tab.

Question numbers

# Survey options (continued)

## Notable

- Responses
  - Back button
  - Allow respondents to finish later
  - Custom error message
  - What to do with incomplete survey responses
  - Survey availability
- Security
  - Survey access
  - Password protection
  - Bot detection
  - **Anonymize responses**
    - **Click ON so you don't collect respondents' IP addresses by default**
    - **(IRB will require you to do this!)**

# (Even more) survey options

## Also notable

- Post-survey
  - Send a thank you email
- Quotas

○ Quotas > Default Quota Group > New Quota Edit Multiple ▾

**0/100** Set Quota **New Quota**  Increment the quota when a response is submitted that meets the following conditions:

Question ▾  ✖ +

---

Quota options

When the quota has been met, then:

[Customize](#)

Note: The survey will only end for respondents that meet the quota condition

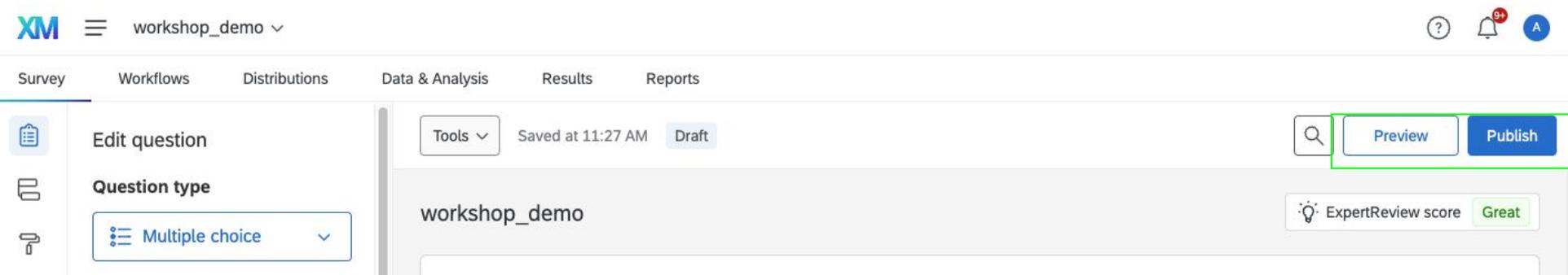
+ Add Quota

Close Save

# **DISTRIBUTING YOUR SURVEY**

# Preview vs. Publish

- You need to click PUBLISH so the changes are reflected in your actual survey
- Preview survey
  - option to see appearance on mobile vs. desktop



The screenshot displays the XM survey editor interface. At the top left, the XM logo is visible next to a hamburger menu icon and the text 'workshop\_demo'. The top navigation bar includes 'Survey', 'Workflows', 'Distributions', 'Data & Analysis', 'Results', and 'Reports'. On the right side of the top bar, there are icons for help, notifications (with a '9+' badge), and a user profile. The main editing area on the left shows 'Edit question' and 'Question type' set to 'Multiple choice'. The central workspace displays 'workshop\_demo' and 'Saved at 11:27 AM' with a 'Draft' status. On the right side of the workspace, there is a search icon and two buttons: 'Preview' and 'Publish', both of which are highlighted with a green rectangular border. Below these buttons, an 'ExpertReview score' is shown as 'Great'.

## Distributing your survey

- **Anonymous survey link:** can be accessible by anyone with the link
- **Personal link:** link can only be accessed once, by a single person

# **POST-DATA COLLECTION**

# Downloading your data

**XM** ≡ workshop\_demo ▾



Survey Workflows Distributions **Data & Analysis** Results Reports

**Data** Text iQ Crosstabs iQ Weighting

## Data Table

Last Record Collected: Never Inactive Recorded responses (0) ▾ [Field Editor](#)

[Add Filter](#) ▾

[Export & Import](#) ▾ [Tools](#) ▾ [Column chooser](#) ▾

- I don't recommend looking at your data in the data and analysis tab because it's very clunky. It's a lot easier to look at it in the reports section or download it and look at it in Excel, Google Sheets, etc.
- Sometimes you will get a message like this...



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

- Just give it a few minutes, and then you'll be able to download your data.

# Downloading your data (continued)

- Many options for downloading your data

### Download a data table

CSV TSV Excel XML SPSS Google Drive 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

**Numeric responses or choice text**

Use numeric values

Use choice text

[More options](#)

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

**Numeric responses or choice text**

Use numeric values

Use choice text

Compress data as .zip file

Use commas for decimals

Remove line breaks

Recode seen but unanswered questions as -99

Recode seen but unanswered multi-value fields as 0

Export viewing order data for randomized surveys

Split multi-value fields into columns

Use internal IDs in header

Exclude survey response edits

Include download links for user-uploaded files

[Fewer Options](#)

# Reports

**XM**  workshop\_demo 

Survey Workflows Distributions Data & Analysis Results **Reports**



There are no reports for this project

[+ Create Report](#)

Please read the following passag...

[+ Add Metric](#)

Filter

 [Add Filter](#)

Response Count

[Default \(None\)](#) 

Breakout

[None](#) 

Display L

[Default](#) 

Visualizat

-  Bar Chart
-  Line Chart
-  Pie Chart
-  Breakdown Bar
-  Gauge Chart
-  Data Table
-  Statistics Table
-  Results Table

Survey Workflows Distributions Data & Analysis Results **Reports**

Report **fdf**  File  Share  Edit  View  Insert 

Saved just now

America/Denver -06:00 America/Denver

    100% 

0 Responses  [Add Filter](#) 

# Reports (continued)

- Select a question
- Click visualize
- Choose the type of visualization (data table and statistics table are especially helpful for a quick summary of your data)

The screenshot shows the top navigation bar of a survey report with options like 'Report fdf', 'File', 'Share', 'Edit', 'View', and 'Insert'. Below the navigation bar, there are icons for sharing, printing, and settings, along with a '100%' zoom level. The main content area is mostly blank, with an 'Insert' button and a search bar. A search results dropdown is visible, listing several questions, with 'attention\_1 - Please read the following passage and answer the question below. More than...' selected.

This screenshot shows a vertical menu of visualization options. At the top, there is a 'Default (Choice Count) attention\_1' header and a 'Please read the following passag...' sub-header. Below this is a '+ Add Metric' button. The 'Filter' section has an 'Add Filter' button. The 'Response Count' section has a 'Default (None)' dropdown. The 'Breakout' section has a 'None' dropdown. The 'Display L' section has a 'Default' dropdown. The 'Visualizat' section has a 'Bar Chart' dropdown. A search bar is visible at the top of the visualization options menu.

# If you have further questions...

- Make an appointment with SSDS
  - Good for basic Qualtrics questions but more importantly, help with survey design and analysis! (concerns about bots, post-treatment bias, etc.)
- Ask Qualtrics support via live chat (usually can chat with a live support representative within a few minutes)
  - Good for basic Qualtrics questions
- Basic tutorial:

<https://www.qualtrics.com/support/survey-platform/survey-module/survey-module-overview/>

# SSDS link

- <https://ssds.stanford.edu>

1. Select a staff member:

- › R
- › Python
- › Stata
- › R - Basic Questions
- › Python - Basic Questions
- › Stata - Basic Questions
- › R Data Wrangling, Cleaning, and Manipulation
- › Python Data Wrangling, Cleaning, and Manipulation
- › R Data Visualization
- › R Analytical Methods
- › Python Analytical Methods
- › R Machine Learning
- › Survey Design

2. Select Date:

Apr 2023

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

3. Select Time:

Friday, April 21, 2023

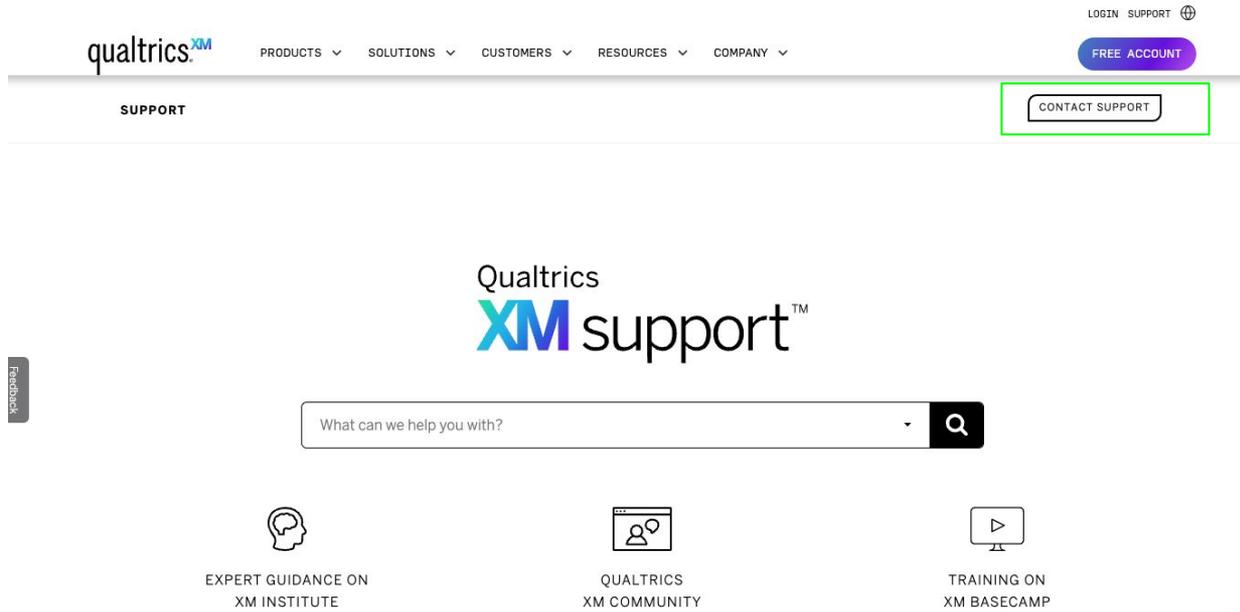
Time Zone: Pacific Time - US & Canada ([change](#))

9:00am 10:10am 11:20am

Continue

# Qualtrics support link

- [https://www.qualtrics.com/support/?utm\\_lp=contact](https://www.qualtrics.com/support/?utm_lp=contact)
- Get technical support → survey platform → live chat (recommended)



The screenshot shows the Qualtrics support page. At the top, the Qualtrics logo is on the left, and navigation links for PRODUCTS, SOLUTIONS, CUSTOMERS, RESOURCES, and COMPANY are in the center. On the right, there are links for LOGIN, SUPPORT, and a purple button for FREE ACCOUNT. Below the navigation bar, the word "SUPPORT" is on the left, and a "CONTACT SUPPORT" button is highlighted with a green box on the right. The main content area features the "Qualtrics XM support" logo, a search bar with the placeholder text "What can we help you with?", and a search icon. At the bottom, there are three icons representing different support options: "EXPERT GUIDANCE ON XM INSTITUTE" (head icon), "QUALTRICS XM COMMUNITY" (group icon), and "TRAINING ON XM BASECAMP" (play button icon).