**Qualtrics Cheat Sheet (D-Lab Workshop)**

Basics of Qualtrics User Interface:

* **Look & Feel**: Options for what the survey will generally look like to your respondents.
* **Survey Flow**: Extremely useful for managing survey order/randomization/content.
* **Survey Options:** Mostly can be ignored. Some useful options for very specific problems.
* **Tools:** A few very useful options (“search-and-replace”, “test survey”, “quotas”) that we’ll cover later.
* **Preview Survey:** Allows you to see what respondents will eventually see. *Should be used regularly*.
* **DISTRIBUTIONS:** Used to create your survey link
* **DATA & ANALYSIS:** Used to export survey data and to check *individual* results
* **REPORTS:** Used to quickly check *aggregate* results of survey without having to download dataset

Question Types:

* **Descriptive Text**:
  + Rich Content Editor, Normal View vs. HTML view
* **Multiple Choice:** Standard 1-question format
  + Number of Scale Points, Scale Position (Horizontal/Vertical), Validation Options (None, Request, Forced)
* **Matrix Table**: More than one question that use a similar scale
  + Likert vs. Bipolar, Repeat Headers, Statement Randomizer
* **Text Entry:** Free response text
  + Text Type/Size, Validation Types (min. length, max. length, range, content- numbers, custom validation)
* **Application of Descriptive Text & HTML: Videos**
* **Timer**: Allow you to measure and control how much time is being spent on a given page
  + Timers record timing for pages, not questions or blocks.
  + Can force people to stay on a given page either up to or no more than a specified length of time.
* **Many other great ones**: Slider, Constant Sum

**Blocks**

* A collection of any number of questions. Used for grouping related questions together for organization, randomization
* Features:
  + Question Randomization: Allows randomization at the block level (Note: Enabling Question Randomization will ignore page breaks, questions per page, skip logic and override question order)
  + Copy Block: Useful for quick duplication
  + Delete Block: Useful for quick deletion
* Application of Blocks: Attention Check Questions & Prescreen Fillers

**Survey Flow**

* Used to determine what will be presented to your respondents, and in what order it will show up.
  + **BLOCK**: A set of *survey questions*
  + **BRANCH**: *If/then instructions* for displaying other elements
  + **EMBEDDED DATA:** *Metadata* that can be set by the user
  + **RANDOMIZER:** Used for *randomizing* order/display of elements
  + **END OF SURVEY:** *Concludes survey* upon reaching this element
* **Application of End of Survey & Branch with Attention Checks & Prescreens**
  + When a respondent encounters an **End of Survey** element, they will be shown a customizable message, and the survey will end.
  + Surveys can have *multiple* **End of Survey** elements in them, triggered by different conditions, but any given respondent can only hit a single one.
  + **Uses of End of Survey:** Providing a redemption code for workers, preventing access to the survey for an unqualified respondent, redirecting respondents to a different survey
* **Application of Embedded Data & Experimental Manipulation**
  + **Uses of embedded data:** Creating treatment/control groups, capturing IDs for repeat use of respondents in panel studies, setting up complex if/then logic chains

**Advanced Question Format (in the “gear”)**

* **Add Display/Skip Logic**: Extremely useful for managing survey flow
* **Carry Forward:** Takes previously used options and displays them again
* **Add Javascript:** Advanced, but very useful
* **Randomization:** Change the order of options
* **Recode Values:** Change output value/variable labels

**Advanced Survey Flow**

* **Display Logic:** Controls whether current question is displayed based on previous question answers.
* **Skip Logic:** Controls whether next question(s) are displayed based on current question answers.
* **Branch *(in ”Survey Flow*”):** Controls whether a blockis displayed based on previous question answers.

**Randomizations, SO MANY!**

* **Randomization:** Randomizes the order/appearance of response/item options (under “*gearbox*”)
* **Answer Randomization:** Randomizes the order/appearance of scale options (under “*gearbox*”, sometimes)
* **Question Randomization:** Randomizes the order/appearance of questions (under “*block options”*)
* **Randomizer:** Randomizes the order/appearance of survey elements (under *“survey flow”*)

**Survey Options**

* Options: Back Button, Prevent Ballot Box Stuffing, Prevent Indexing, Survey Termination, Partial Completion

**Look and Feel**

* Options: Next Button Text, Progress Bar, Theme

**Tools**

* Options: Test Responses (Review -> Generate Test Responses), Import/Export

**Preview (Testing Survey)**

* You can preview the survey an infinite number of times using the “**Preview Survey**” button at the top.
* You can also preview an individual question using “**Preview Question**” on the right question options panel, and preview a block by select “**View Block**” from Block Options.
* To make sure randomization is working, you can use “**Test Survey**” to pipe through fake respondents (up to 1000). NOTE: fake respondents will make all answer selections *randomly*.
* Both *previews* and *tests* are automatically recorded, and will need to be deleted later before you download the data.

**Publish**

* VERY important to click before launch survey
* Even if questions are saved, must publish for those changes to take effect. Or else participants will see old version of Qualtrics

**Tips and Tricks**

* When setting Display Logic, be very careful of AND versus OR.
* Data output for ”multiple answer” questions is annoying.
* Use the “Survey Flow” feature to move blocks around.
* Try not to copy lots of versions of the same question until you KNOW that is going to be the final version of that question.
* Empty the trash regularly to prevent slowdown
* Label all questions in advance
* HIDE your affiliation with Berkeley! (Look & Feel; shorten survey link w/ bitly.com)
* Use page breaks as often as makes sense
* Think carefully about the order of your questions – demographics often are best *last*
* Always put instructions on a separate page from activities
* Use **bold**, *italics*, and COLORthoughtfully for emphasis.
* Do as much as you can to hide the purpose of your survey!
* Strongly consider using an attention check (or threat of one)
* Include a ”comments” section at the very end of the survey
* Keep tasks and texts that respondents have to engage in as brief as possible

**Distributions**

* Anonymous reusable linkis useful for distributing to participants via SONA, MTurk
* Email Tracking Available (You’ll have access to their email, so data are not de-identified)

**Data & Analysis**

* Export Data
  + Remember to Click “Use numeric values”
  + More Options: Export viewing order data for randomized surveys

**Reports**

* Qualtrics prepares some readymade graphs for you

**More Advanced Techniques**

* **SONA, MTurk Integration**
* **Piped Text**
  + You can use the interface to pipe in text of all kinds into the text of a question, response options, or scale labels.
  + Access piped text by clicking either on the question text box and selecting “Piped Text”, or by selecting a response/scale option and selecting “Piped Text” from the dragdown menu.
  + All piped text appears in the editor as ${x://…/…}, where “x” is equal to…
    - q: text from previous questions and responses
  + e: text from embedded data
  + lm: text from a loop-and-merge
* **Quotas** are found under ”Tools”, and used to ensure you only get a certain number of respondents of a certain type
  + To use a quota, simply select a question that has response options you want to select on, then set the number of people allowed to select that option. When the actual number exceeds the quota, clicking that option will automatically end the survey.
  + Generally, you want to put quota questions at the *beginning* of the survey. Otherwise, you’ll have very angry respondents!
* **Javascript**
  + Most things you want to do in Qualtrics can be done *without* Javascript, but JS can be used to set up very complicated randomization schemes
  + To implement, click “add Javascript” from the Gear menu on the first question in your survey. Note that JS will not function until the page *after* the one it gets implemented on.
* **Loop and Merge**
  + If you want people to answer a large number of very similar questions in a row, **Loop And Merge** provides an easy way
  + Access this function by selecting “Loop and Merge” under Block Options
  + ”Loop and Merge” will repeat the entire block while displaying new ”Field Value(s)” for each loop. Type in values as desired, then on the question text, enter ${lm://Field/x}, where “x” corresponds to the *field column* from the Loop and Merge page.

*Created by Sean Feeder, Edited by Dan Stein, for D-Lab*