



# UBC SURVEY TOOL



## Advanced Qualtrics - Reference Information

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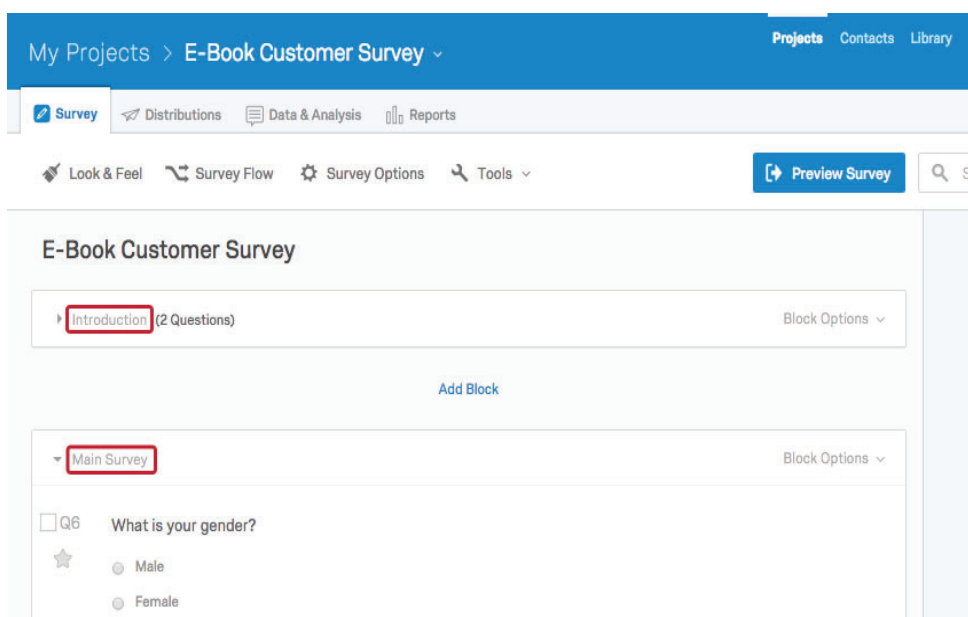


This is a listing of some of the advanced concepts in Qualtrics. We will cover as much as we can during training sessions, and this handout is meant to introduce you to other topics that may be of interest. You can find more about them at the support links listed at the end of this documents. Search for the particular title of the feature in Qualtrics Support to find documentation including step by step instructions and videos.

## Survey Blocks

Blocks are sets of questions within your survey. Typically, questions are separated into blocks for the purpose of conditionally displaying an entire block of questions, or for randomly presenting entire blocks of questions. These branching and randomization options are found in the Survey Flow.

Blocks can also be used to organize longer surveys. For example, the first two questions in your survey might be in a block called "Introduction," and the rest of your survey questions in a block called "Main Survey."



Respondents won't see these block titles, but adding a description that they will see is easy. Simply add a Descriptive Text question as the first question in your block. This is found in the question types menu, or by removing all the choices from a multiple choice question.

Block Options can be found on the top right of every block. There are options that allow you to manipulate the block as a whole.

**Loop and Merge** allows you to present the same questions to a respondent multiple times. For example, if your block is a set of product satisfaction questions, you might want to repeat the block for each product the respondent has purchased.



## Survey Flow

The Survey Flow is a block-level view of your survey. From here, you can customize where respondents go in your survey and what they see. You can perform simple tasks like rearranging blocks, or you can add elements like Branch Logic that direct and personalize your respondents' survey experience. Respondents will start at the top of the flow and work their way through until they reach an end point and finish the survey.

The following is a list of the different Survey Flow elements that can be used in combination with each other to create a well-designed research project.

- **Question Blocks:** Show a block of questions (typically used in conjunction with other Survey Flow elements).
- **Branch Logic:** Conditionally display blocks and other elements. You can use Branch Logic to branch respondents to different Survey Flow elements based on variables like question responses or Embedded Data. Depending on how your respondents answer certain questions, they will take different routes through your survey.
- **Embedded Data:** Add any extra information beyond the question responses (such as panel data or other variables from your contact list or assigned according to how a question is answered).
- **Randomizer:** Randomly present question blocks and other elements. Question Randomization allows you to randomize the order of the questions in your block, display only a subset of the questions, and even permanently hide certain questions.
- **End of Survey Element:** Even though you can easily change the default end-of-survey experience in Survey Options, you sometimes may want a different end-of survey experience for different respondents.
- **Table of Contents:** You can use the Table of Contents (ToC) feature to allow your respondents to easily navigate between your question blocks while taking your survey.

## Randomization

There are many ways to randomize various elements of your Qualtrics Survey. You can randomize responses (use the question's Settings gear), questions (use block settings), and blocks or pages (see above, Survey Flow Randomizer). There is a lot of flexibility in what you would like randomized, using the advanced options.

## Recode Values

When you create a question, a numeric value (known as a "recode value") and variable label are automatically assigned to each answer choice. By default, the first answer choice will be coded as a 1, the second choice as a 2, and so forth, even if you remove answer choices or change the answer choice order.

These recode values and labels are recorded in the collected dataset and you can modify them to align with your desired statistical analysis.



## Scoring

Whether you are trying to create a helpful quiz or a fun personality test, you want to use Scoring. This feature gives you the ability to attach a point value to the answers of specific question types. These point values are summed up to give your respondent a final score. To score a question, you must be in the Scoring Editor (Survey Tools), which is an overview of your survey questions (note that only supported question types can be scored).

## Carry Forward

Carry Forward allows you to copy specific answer choices from one question and bring them into a future question in your survey. For instance, you can first show your respondents a question that asks which products they have bought from your company in the last six months. You can then carry forward the choices they selected into the next question and ask the respondents to rank their preference from those previously selected choices only.

## Question Types

Qualtrics provides over 100 different ways to ask a question. There are 22 primary question types and a variety of settings that can be used to access each of these possibilities. This page provides a brief description of the 22 question types.

Each of the question types described below can be added to your survey by either (1) using the Change Question Type dropdown menu to change an existing question or (2) clicking the dropdown arrow next to Create a New Question to add a new question.

## Static Content

These questions do not require any action; Information in these questions is merely displayed to respondents.



### Descriptive Text

Descriptive Text questions can be used to add an introduction or instructions to your survey, or wherever you need to display content to the respondent, without asking for feedback.



### Graphic

Graphic questions can be used to display an image to your respondents without asking for feedback.



## Standard Questions

These question types are some of the most commonly used. They are a simple and effective means of gathering information.



### Multiple Choice

Multiple Choice questions form the basis of most research. They can be displayed as a traditional list of choices or as a dropdown menu, select box, etc.



### Text Entry

Text Entry is used to gather open-ended feedback from respondents. These responses can be lengthy essays, standard form information such as name and email address, or anything in between.



### Rank Order

Rank Order is used to determine each respondent's order of preference for a list of items.



### Matrix Table

Matrix Table is used to collect multiple pieces of information in one question. This type provides an effective way to condense your survey or to group similar items into one question.



### Slider

Sliders let respondents indicate their level of preference with a draggable bar rather than a traditional button or checkbox.



### Side by Side

Side by Side questions let you ask multiple questions in one condensed table and provides an effective way of shortening your survey while gathering the same amount of data.



## Specialty Questions

These questions are used in more specific situations and gather more targeted data.



### Constant Sum

Constant Sum collects numeric data and displays a sum to the respondent. This type is often used for allocation assessments, such as defining how you spend your time in different activities.



### Hot Spot

Hot Spot allows respondents to interact with regions of an image. This type is often used in usability testing and concept testing.



### Graphic Slider

This variation of the Slider question has respondents use various graphic options, such as changing a frown to a smile or choosing a grade, to indicate their level of preference.



### Drill Down

Drill Down helps respondents choose from a long list by starting with a broad category and then honing in on the choices that are relevant to the respondent.



### Pick Group and Rank

Pick Group and Rank is used for sorting activities. Respondents place items into groups and have the option to rank the items within the group.



### Heat Map

Heat Map lets respondents click a specific point on an image. In your data, you can see a heat map that shows which parts of the image were most often clicked. This type is often used for web development (e.g., eye flow analysis) and advertisement testing.



### Gap Analysis



This variation on the Side by Side question measures satisfaction and then detects why any “gaps” in satisfaction exist.



### Net Promoter® Score

NPS® tracks customer loyalty with one simple, standardized question: “On a scale from 0-10, how likely are you to recommend our company to a friend or colleague?”



### Highlight

The Highlight question type allows you to present survey participants with an interactive text sample. Participants can select words from the text and evaluate using criteria you choose. For example, whether they like or dislike the selected text.



### Signature

The Signature question type presents survey participants with an entry box where they can draw their signature. On a desktop, they can use their mouse, and on a mobile device they can use their finger.

## Advanced Questions

These questions go above and beyond standard survey insights; they allow you to obtain detailed information about your respondent and their interaction with your survey, often without requiring any action from the respondent.



### Timing

This hidden question is used to time—as well as limit—how long participants spend on a page of the survey.



### File Upload

File Upload is used to collect information beyond the survey questions, such as user-uploaded photos or documents. The File Upload question type is an add-on feature not included in the standard Qualtrics license. Please contact your Qualtrics Account Executive for more information.



### Screen Capture





Site Intercept Screen Capture allows respondents to attach a screenshot of the site they are viewing when taking a survey through Site Intercept.



### Captcha Verification

Captcha Verification is used to ensure that your respondents aren't robots. This question has participants respond to a challenge to verify they are real humans.



### Meta Info

Meta Info reports the public information about the respondent's computer, such as their browser and operating system. The question requires no respondent action and is completely hidden.

## Best Practices for Libraries and Sharing Projects

A Library consists only of what you choose to copy into it, whether it be all or part of a project (survey), files, contact lists, etc. A project that you create does not, by default, go to your personal Library.

If you're building a project that you want to share with a Group or with individual Qualtrics account holders, but you do not want others to collaborate on the project, first finish creating it in your own account, then copy the entire project to a Group Library or user, via your main Projects page.

You also can copy Blocks to your Group Library as you create them, for sharing purposes. This is useful for projects/questionnaires that people in a group want to copy into their own projects (e.g. a standard demographics set of questions).

Keep in mind that you can only fully collaborate when you first Share a Project with another user.

Important: The creator of any project owns that project, even if they have shared it with full permissions to others. If the creator deletes the shared project, it is deleted for all users.

If you have created a project that you no longer wish to own, contact the IT service centre.

## For More Information

The Qualtrics website includes comprehensive and easy-to-follow help documentation. Tutorials, webinars and detailed directions are available via Qualtrics' extensive online resource, Qualtrics Support.

[www.qualtrics.com/support](http://www.qualtrics.com/support)



For fast, individualized support over chat, email or a scheduled phone call, please start here:

[www.qualtrics.com/support-center](https://www.qualtrics.com/support-center)