

Survey Basics: Introduction to Qualtrics

IRAP Professional Development Workshop Series

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Office of Institutional Research,
Assessment, and Planning

Outline

1. Background on Surveys and Assessment
2. Intro to Qualtrics
3. Survey Construction
4. Administering Your Survey
5. Interpreting Your Results
6. Additional Survey Setup Options

Why Surveys?

- Learn about a population
- Purpose
 - “Pulse”
 - Prioritize Actions
 - Indirect Assessment
 - Provide Benchmarking
- At Oxy, scientific sampling is essentially impossible
 - Convenience Samples
 - Goal: Response Rate of 60-70%
 - Post-Hoc Weighting

Assessment and Making Data-Driven Decisions

- In the context of Oxy, surveys have the power to inform decision making processes and drive intelligent evolutions of projects and services
- Academic departments, support units, and administrative offices are all either encouraged or internally required to engage in the collection of assessment data
- By engaging in the collection of quantitative data, your department can become more responsive and improve satisfaction of your end-users

What is Qualtrics?

- Qualtrics is a professional survey administration and management tool
 - Google Forms has proven to be a popular alternative, but serves only very simple needs
- Oxy has an institution license
 - For an account, email Carey Sargent (sargent@oxy.edu)
- Collaboration on surveys with anyone at Oxy is easy

Designing Survey Questions

- Research Question? PURPOSE?
(think about your hypothesis/conclusion/abstract/report)
 - LESS IS MORE!
 - Focus on Knowledge, Skills, Attitudes
 - Validity (Content) and Reliability (Consistency)
 - Pilot your survey, get feedback, know your audience
 - Think about your analysis while developing

Dos and Don'ts of Surveys

- Ensure
 - Questions and responses are *clear* and *concise*
 - Response categories are *exhaustive* and *mutually exclusive*
- Avoid
 - Double negatives
 - Double barreled questions
 - Biased/leading questions

Building Your Instrument

- Your survey instrument should be as short and as straightforward as possible while still measuring what you need it to - only ask necessary questions
 - People are much less likely to complete your survey if it is long
 - If you must have a long survey, split questions into groups on different pages
 - Two benefits: saves partial responses should people drop-off partway through; may increase completion speed & response rate

Question Design Choices

- Types of questions:
 - General Forms
 - Multiple Choice
 - Slider/Scale (snap to whole numbers in most cases, especially when Likert)
 - Matrix
 - Free Response
 - Unusual Forms
 - Rank Order Lists
 - Explanatory/Introductory Text
 - Document Upload
- Not all question types work on mobile devices - an amber asterisk will indicate compatibility issues (sliders are the most popular type of question with mobile issues)

Other Design Features

- Question Blocks
 - Blocks show up as separate pages in the live survey
 - Have an introductory page as the first block
- Display and Skip Logic
 - Display logic allows you to create *contingency questions* - questions that only display in response to a condition (such as if the respondent says *yes* to a question)
 - Skip logic allows you to jump to a different section of the survey in response to a condition


Steps before Launch

- *Survey Options* and *Look and Feel* are the two final settings menus to be addressed before launching a survey
- *Survey Preview* allows you to see how the survey will look to your respondents
- *Launching* is the final step before administering your survey

SURVEY OPTIONS

Survey Options

Survey Experience




- Back Button.** Enable respondents to change their responses.
- Save and Continue.** Allow respondents to save and continue later.
- Show Export Tags.** Helpful for survey collaboration.
- Use Custom Survey Validation Messages...**

Survey Language: The language the survey is written in.

Survey Title: This text will appear in the browser as the window or tab title.


Meta Description: Search engines and social media services use this description.

Survey Protection



- Open Access.** Allow anyone to take this survey.
- By Invitation Only.** Allow only those who receive invitation emails to take the survey (this will reject anonymous links).
- Password Protection.** This password must be entered to take this survey:
- Prevent Ballot Box Stuffing.** Keep people from taking this survey more than once.
- HTTP Referrer Verification.** The user must come from this URL to take the survey:
- Prevent Indexing.** A tag will be added to the survey to prevent search engines from indexing it.
- Survey Expiration.** The survey will only be available for a specified date range.

Survey Termination







- Default end of survey message.**
- Redirect to single response report.
- End of survey message from a library.

Under the Edit Survey tab, there are other tabs. This is Survey Options. In this window, you can make changes to the mechanics of the survey such as Survey Experience, Survey Protection, Survey Termination...

Research Suite

Survey Options

	<input type="checkbox"/> HTTP Referer verification. The user must come from this URL to take the survey.
	<input type="checkbox"/> Prevent Indexing. A tag will be added to the survey to prevent search engines from indexing it.
	<input type="checkbox"/> Survey Expiration. The survey will only be available for a specified date range.
Survey Termination 	<input checked="" type="radio"/> Default end of survey message. <input type="radio"/> Redirect to single response report. <input type="radio"/> End of survey message from a library ... <input type="radio"/> Redirect to a URL full URL, ex. "http://www.qualtrics.com": <input type="checkbox"/> Send additional thank you email from a library ... When distributed via the Survey Mailer. <input type="checkbox"/> Anonymize Response. Do NOT record any personal information and remove panel association (not recommended).
Inactive Surveys 	<input checked="" type="radio"/> Default inactive survey message. <input type="radio"/> Display inactive survey message from a library ...
Partial Completion 	How long to wait before partially completed surveys are closed and data is recorded. Please note, the recipient cannot continue taking the survey once their data is recorded: <input type="text" value="After 1 Week"/>
Response Set 	New responses go into: <input type="text" value="Default Response Set"/> Manage Response Sets Response sets allow you to place survey responses into different buckets. For example, quarterly or monthly surveys could be collected in different buckets. This allows you to view results of the same survey for different collection periods.

Survey Termination is something you may want to edit individually for each survey you create. These settings determine what happens when the survey is completed, such as a completion message or a thank-you email.

Embedded Data

In order to import the embedded data fields from your panel to your survey results, add them to the “Survey Flow”

The screenshot shows the 'Survey Flow' interface for a demo survey. At the top, there is a header bar with the text 'Survey Flow' and 'IRAP Qualtrics Training - Demo Survey (7/28/15)'. Below this, a grey box contains the text 'Show Block: Default Question Block (0 Questions)' and four links: 'Add Below', 'Move', 'Duplicate', and 'Delete'. A yellow pop-up menu is open, titled 'What do you want to add?' with a 'Cancel' link. The menu contains several buttons: 'Block', 'Branch', 'Embedded Data' (highlighted in green), 'Randomizer', 'Web Service', 'Authenticator', 'End of Survey', 'Reference Survey', and 'Conjoint'. At the bottom left of the menu, there is a link '+ Add a New Element Here'.

ED

Set Embedded Data:

Enter Embedded Data Field Name Here...

Value will be set from Panel or URL. [Set a Value Now](#)

[Add a New Field](#)

[Add Below](#)

[Move](#)

[Duplicate](#)

[Add From Panel](#)

[Options](#)


[Delete](#)

Import Panel Embedded Data

Select a Panel...

Please Select...

 Cancel

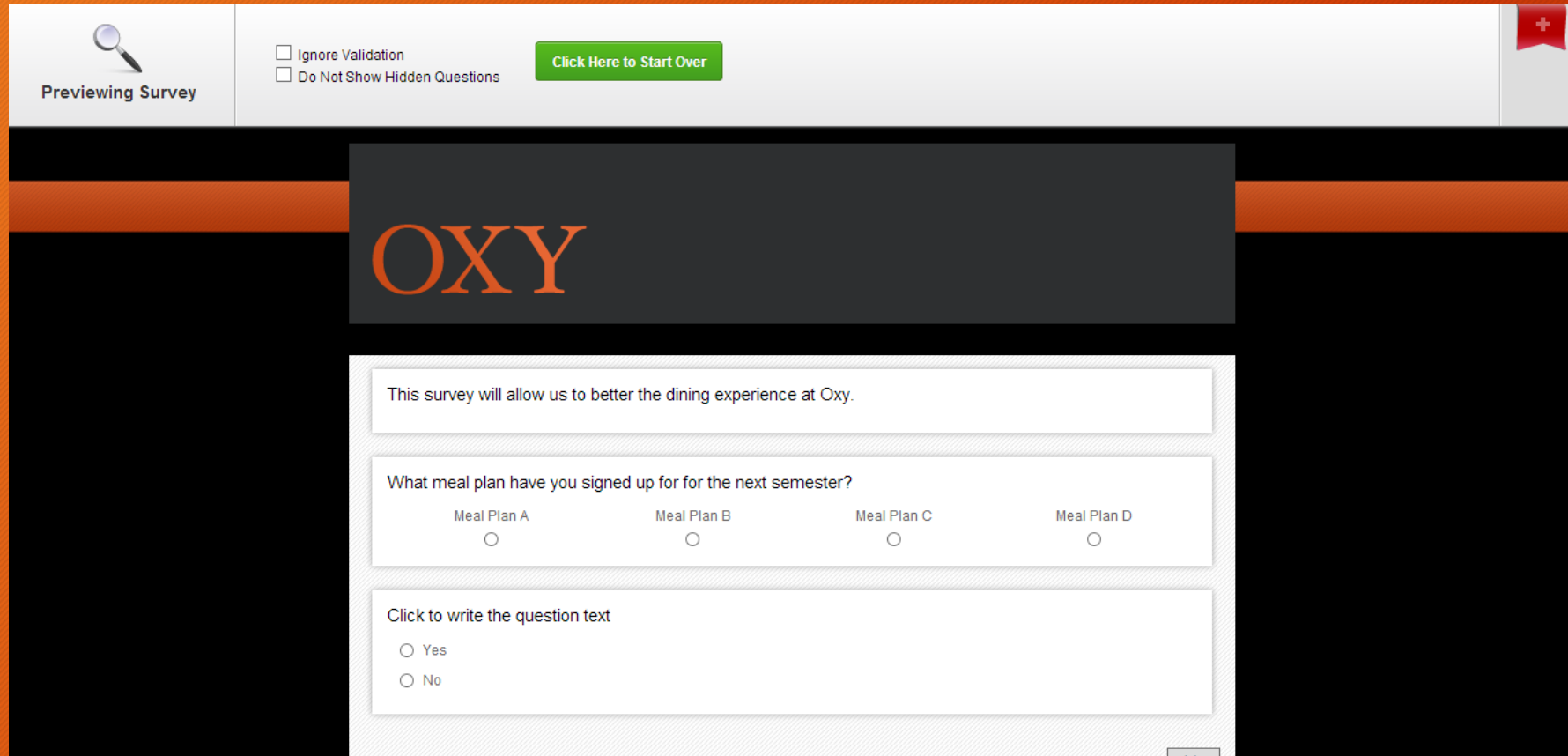
 OK

LOOK AND FEEL

The screenshot displays the 'Dining at Oxy' 'Look and Feel' configuration interface. At the top left, the title 'Dining at Oxy' is followed by the subtitle 'Look and Feel'. Below this, there is a preview window on the left showing a mobile device view of the survey with the 'Occidental College' logo and the survey question 'What meal plan have you signed up for for the next semester?'. To the right of the preview is a settings panel with a tabbed interface. The 'General' tab is active, showing options for 'Next Button Text' (set to '>>'), 'Back Button Text' (set to '<<'), 'Progress Bar' (set to 'None'), and 'Questions Per Page'. There are also checkboxes for 'Highlight Questions' (unchecked) and 'Question Separator' (checked). Below the settings panel is a large preview area showing the 'OXY' logo in orange on a dark background. Below the logo is a white survey question box with the text 'What meal plan have you signed up for for the next semester?' and four radio button options: 'Meal Plan A', 'Meal Plan B', 'Meal Plan C', and 'Meal Plan D'. At the bottom right of the interface are two buttons: 'Cancel' with a red 'X' icon and 'Save' with a green checkmark icon.

Next to Survey Options, there is Look and Feel. When you choose this options tab, you will be taken to a preview of the website. At the top of this preview, you will be able to customize the survey's appearance.

PREVIEW THE SURVEY



The screenshot shows a web interface for previewing a survey. At the top, there is a white header bar with a magnifying glass icon and the text "Previewing Survey" on the left. In the center of the header, there are two checkboxes: "Ignore Validation" and "Do Not Show Hidden Questions". To the right of these checkboxes is a green button labeled "Click Here to Start Over". On the far right of the header, there is a red ribbon icon with a white plus sign. Below the header, the main content area has a dark background with a central white box. The white box contains the "OXY" logo in orange. Below the logo, there is a text box with the text "This survey will allow us to better the dining experience at Oxy." Below that is a question: "What meal plan have you signed up for for the next semester?". There are four radio button options: "Meal Plan A", "Meal Plan B", "Meal Plan C", and "Meal Plan D". Below the question is another text box with the text "Click to write the question text". At the bottom of the white box, there are two radio button options: "Yes" and "No".

On the same toolbar as Look and Feel and Survey Options, there is Preview Survey. This shows you how the finished product will look.

FINALIZE

The screenshot displays the Qualtrics Research Suite interface. At the top left is the Occidental College Tigers logo. The top right shows 'Research Suite', 'Support & Feedback', and a user profile for 'Daniel Park'. A navigation bar contains tabs for 'My Surveys', 'Create Survey', 'Edit Survey', 'Distribute Survey', 'View Results', 'Polls', 'Library', 'Panels', and 'Reporting'. Below this is a toolbar with icons for 'Survey Link', 'Email Survey', 'Email History', 'Social Media', 'In-Page Popup', 'Website Feedback', 'Survey Director', and 'Preview Survey'. A secondary bar shows 'Dining at Oxy' with a dropdown arrow, an 'Activate Survey' button, and 'Responses: 0'. A green banner below the toolbar reads: 'Need respondents? Use Qualtrics Panels. [Click here](#) to get a quote.' The main content area is titled 'Survey Is Not Active' and features a blue link: 'Activate your survey to collect responses →'. Below this, a section titled 'Your survey is inactive for the following reasons:' lists three items: 'Quality Control' (survey cannot be taken until reviewed), 'Ease of Building' (quick build modes are unavailable), and 'Data Integrity' (data cannot be invalidated on inactive surveys). A final note states: 'A survey should not be activated until you are ready to collect responses from recipients.'

The last step of creating a survey is to finalize it. This can be done by clicking on Launch Survey under the Edit Survey tab or by clicking on the Distribute Survey tab. To finalize your survey, you must activate it by clicking the Activate Survey button.

There are also several distribution methods on this page as well as information on viewing survey results.

Administration: Panel or Anonymous Link?

- Panel
 - Use for administering to set list of people
 - Use when you want to link respondents with responses
 - Use to link *embedded data*
- Anonymous Link
 - Use for sending to listservs, posting on websites, etc.
 - Use when you don't need to link respondents
 - Use for anonymous data collection

Panel Administration: An Overview

- Panel administration is more complicated than anonymous link
- Emails are personalized (mail merge)
- Embedded Data
 - Link information about the respondents that you already have to their responses (Ex: major, team, residence hall, etc)
- Can send reminder emails to people who haven't responded (without re-emailing the entire panel)

Crash Course in Stats

Data

- Guiding Questions:
 - Purpose of the instrument?
 - Instrument design?
 - Target sample?
- Learning about your sample
 - Run frequencies and descriptives on demographics
 - Compare to Oxy

Stats

- Variables
 - Independent
 - Varies across the population; inputs
 - Dependent
 - Responds to independent; outcome

Stats Continued

- Types of Variables
 - Continuous vs. Categorical
- Quantitative Data - Continuous
 - Interval: interval between measures has mean (age)
- Qualitative Data - Categorical
 - Nominal - named groups - sex, yes/no, race, etc.
 - Ordinal - order matters - Likert Scales (agree to disagree)

Frequencies and Descriptives

- Frequencies - for Categorical Variables
 - What % are in each category?
- Descriptives - for Continuous Variables
 - Mean/Media/Mode/Min/Max/Range/standard deviation

Understanding Data - Statistical Tests

- Research Question
 - What do you need to do?

Test	Purpose	Type of Data Involved
Descriptives	Exploratory/Description	1 Continuous
Frequencies	Exploratory/Description	1 Categorical
Cross-Tabs	Exploratory/Description/Intergroup comparison	2 Categorical
T-Tests	Difference - between two groups	1 Categorical & 1 Continuous
ANOVA	Difference - between many groups	1 Categorical & 1 Continuous
Correlation	Relationship - between two variables	2 Continuous

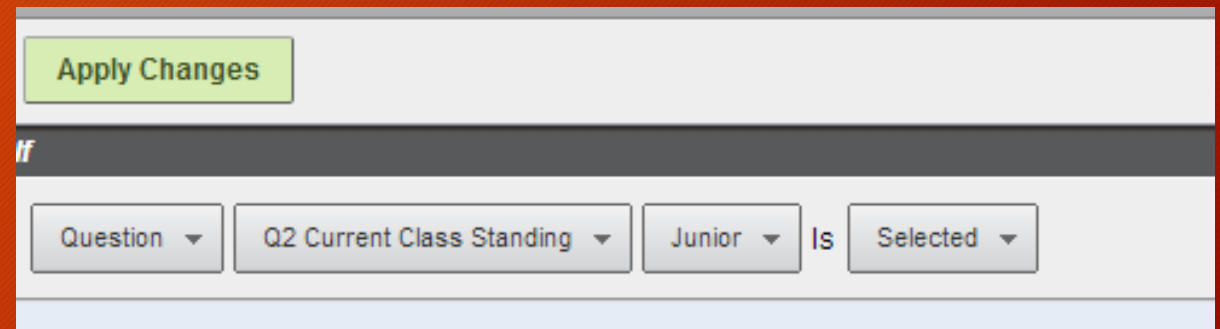
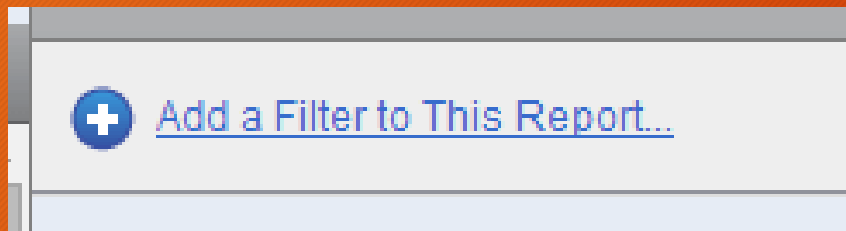
Interpreting Results: Three Approaches

- Qualtrics has two ways to view and interpret results:
 - Results Tab
 - Reporting (Beta) Tab
- Additionally, you can download the data as a csv file and analyze the data yourself in Excel, SPSS, Stata, R, etc.
- Results allows you to view individual responses and frequencies/descriptives (distributions & mean/median/mode)
- Reporting allows you to quickly build an exportable report with more detailed analyses (Ex: crosstabs)

Reporting Using Qualtrics

Filters: Reporting on subpopulations

- Qualtrics allows you to create a report on any subpopulation using *Filters*
 - You can filter on a response to a question or embedded data



Filtering By: Report Subgroup ✕

[Hide Filter Details](#)

If

Question ▾

Q2 Current Class Standing ▾

Junior ▾

Is

Selected ▾

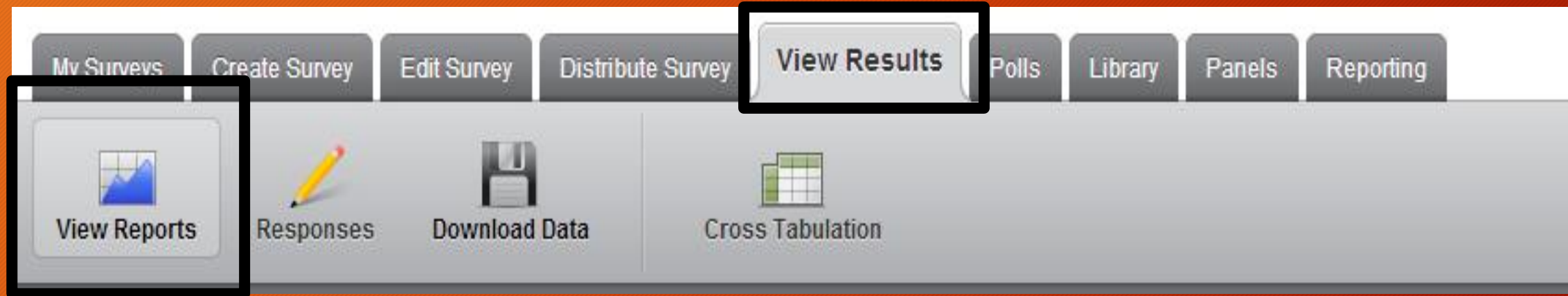
[Show Style Editor](#)

[← Previous Page](#)

9. Being an Oxy athlete has contributed to the development of the following:
(drag each characteristic t...

#	Answer	GREATLY	SOMEWHAT	NOT AT ALL	NOT APPLICABLE
1	Leadership Skills	<u>9</u>	<u>5</u>	<u>0</u>	<u>0</u>
2	Interpersonal Skills	<u>5</u>	<u>8</u>	<u>0</u>	<u>1</u>
3	Physical Health	<u>11</u>	<u>3</u>	<u>0</u>	<u>0</u>
4	Work Ethic	<u>11</u>	<u>3</u>	<u>0</u>	<u>0</u>
5	Time Management	<u>10</u>	<u>4</u>	<u>0</u>	<u>0</u>
11	Goal Setting	<u>6</u>	<u>7</u>	<u>1</u>	<u>0</u>
6	Self-Confidence	<u>8</u>	<u>5</u>	<u>1</u>	<u>0</u>
7	Initiative	<u>8</u>	<u>6</u>	<u>0</u>	<u>0</u>
8	Self-Awareness	<u>9</u>	<u>4</u>	<u>1</u>	<u>0</u>
9	Mental Training/Toughness	<u>11</u>	<u>3</u>	<u>0</u>	<u>0</u>
12	Teamwork/Collaboration	<u>11</u>	<u>3</u>	<u>0</u>	<u>0</u>
10	Mastery of Sport	<u>8</u>	<u>5</u>	<u>1</u>	<u>0</u>
13	Mentorship	<u>4</u>	<u>6</u>	<u>2</u>	<u>2</u>

Results Tab



1. Current Class Standing

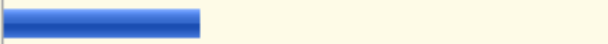

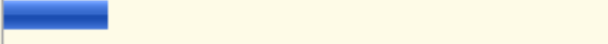

#	Answer		Response	%
1	Freshman		32	32%
2	Sophomore		24	24%
3	Junior		17	17%
4	Senior		26	26%
	Total		99	100%

Table Options ✕	
Statistic	Value
Min Value	1
Max Value	4
Mean	2.37
Variance	1.42
Standard Deviation	1.19
Total Responses	99

Default Frequency Distribution Display

1. Current Class Standing

Graph Options ▾

Next Page →

Add Graph Add Table More... ▾

Senior
Freshman
Sophomore
Junior

Graphs of frequency distributions can be added with one click

Cross Tabulations in Results



View Reports



Responses



Download Data



Cross Tabulation

Banner (Column)

Stub (Row)

There are no questions in this block that can be added to the cross tabulation

<input type="checkbox"/>	<input type="checkbox"/>	Current Class Standing
<input type="checkbox"/>	<input type="checkbox"/>	Sex:
<input type="checkbox"/>	<input type="checkbox"/>	What sports did you play? (Check ALL that apply)
<input type="checkbox"/>	<input type="checkbox"/>	What sports did you play? (Check ALL that apply)
<input type="checkbox"/>	<input type="checkbox"/>	Select all that apply to your role/accomplishments this season:
<input type="checkbox"/>	<input type="checkbox"/>	Did you complete the competition season?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Were you recruited by Oxy Athletics?
<input type="checkbox"/>	<input type="checkbox"/>	Please respond to the following statements:
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Athletics played a major role in my decision to come to Oxy
<input type="checkbox"/>	<input type="checkbox"/>	Oxy Athletics have added to my college experience
<input type="checkbox"/>	<input type="checkbox"/>	My friends at Oxy are mostly my teammates
<input type="checkbox"/>	<input type="checkbox"/>	I improved as an athlete this season
<input type="checkbox"/>	<input type="checkbox"/>	I believe my playing time was equal to my ability and effort
<input type="checkbox"/>	<input type="checkbox"/>	It is difficult to balance athletics and class work
<input type="checkbox"/>	<input type="checkbox"/>	I enjoy being part of the Oxy Athletic community
<input type="checkbox"/>	<input type="checkbox"/>	If you were a new student at Oxy again, would you still decide to participate in athletics?

		Were you recruited by Oxy Athletics?		
		Yes	No	Total
Please respond to the following statements: - Athletics played a major role in my decision to come to Oxy	Strongly Disagree	1 33.33% 2.00%	2 66.67% 8.00%	3 100.00% 4.00%
	Disagree	1 7.69% 2.00%	12 92.31% 48.00%	13 100.00% 17.33%
	Agree	19 73.08% 38.00%	7 26.92% 28.00%	26 100.00% 34.67%
	Strongly Agree	29 87.88% 58.00%	4 12.12% 16.00%	33 100.00% 44.00%
	Total	50 66.67% 100.00%	25 33.33% 100.00%	75 100.00% 100.00%

Turn on row and/or column percent under “Data Options” on the right-hand side

Using Reporting to Build a Professional Report

- Reporting allows you to quickly build a professional and presentable report on your data
 - Less is more - don't include design elements if they aren't relevant to how you are using the data (Ex: stats table)
 - Download into Word if more flexibility needed

Reporting Feature

My Surveys

Create Survey

Edit Survey

Distribute Survey

View Results

Polls

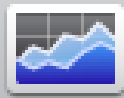
Library

Panels

Reporting



My Reports



Edit Report



Responses



Download Data



Survey Statistics



Email Reports

Create New Report

Search

Generate Report

Page Size

Use Page Size Letter ▾

Theme

Theme Qualtrics ▾

Select Layout



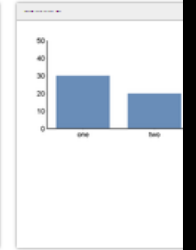
Title, Table



Title, Table, Stats



Title, Graph, Table



Title, Graph

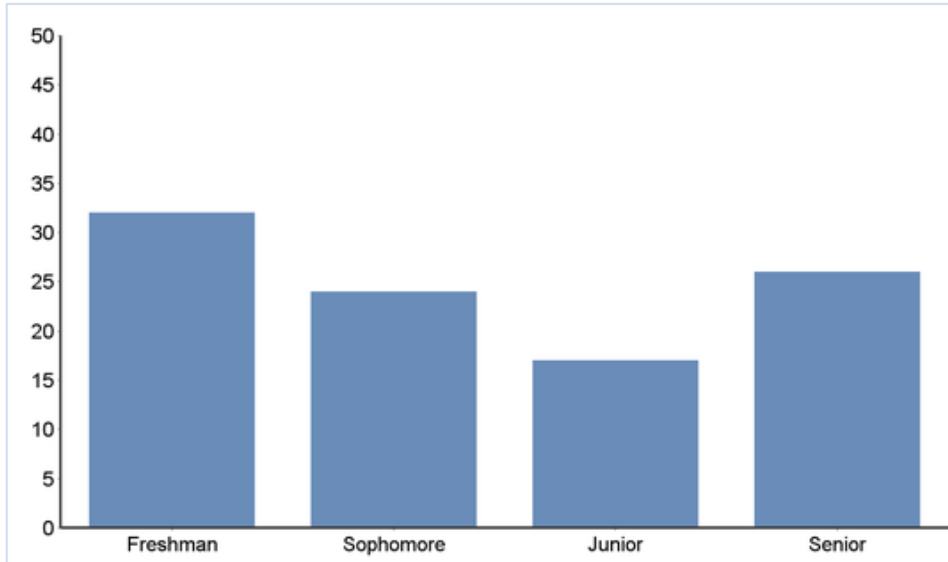


Title, Graph, Table, Stats

Select Questions (24) [Select All](#) [Select None](#)

- Q2 Current Class Standing
- Q1 Sex:
- Q3 What sports did you play? (Check ALL that apply)
- Q4 What sports did you play? (Check ALL that apply)
- Q21 Select all that apply to your role/accomplishments this season:
- Q10 Did you complete the competition season?
- Q20 Were you recruited by Oxy Athletics?
- Q5 Please respond to the following statements:
- Q6 Being an Oxy athlete has contributed to the development of the following:(drag each characteristic t...
- Q7 In a given week, what percentage of your time do you think you spend on each of the following: (Your...
- Q8 What other student activities, groups, and organizations are you involved with?
- Q12 If you were a new student at Oxy again, would you still decide to participate in athletics?

Current Class Standing



Value		Percent	Count	Percent
1	Freshman		32	32.3%
2	Sophomore		24	24.2%
3	Junior		17	17.2%
4	Senior		26	26.3%
-	Total		99	100.0%

Minimum	Maximum	Mean	Variance	Standard Deviation	Respondents
1	4	2.37	1.42	1.19	99

Report Options

Report Name:

Athlete Evaluation - Spring 2014

Font

Arial 100%

Decimal Places

2

Set All Table Styles

Set All Graph Styles

Page Size

Letter (8.5 x 11)

Page Orientation

Portrait

Page Numbering

None

Template Manager...

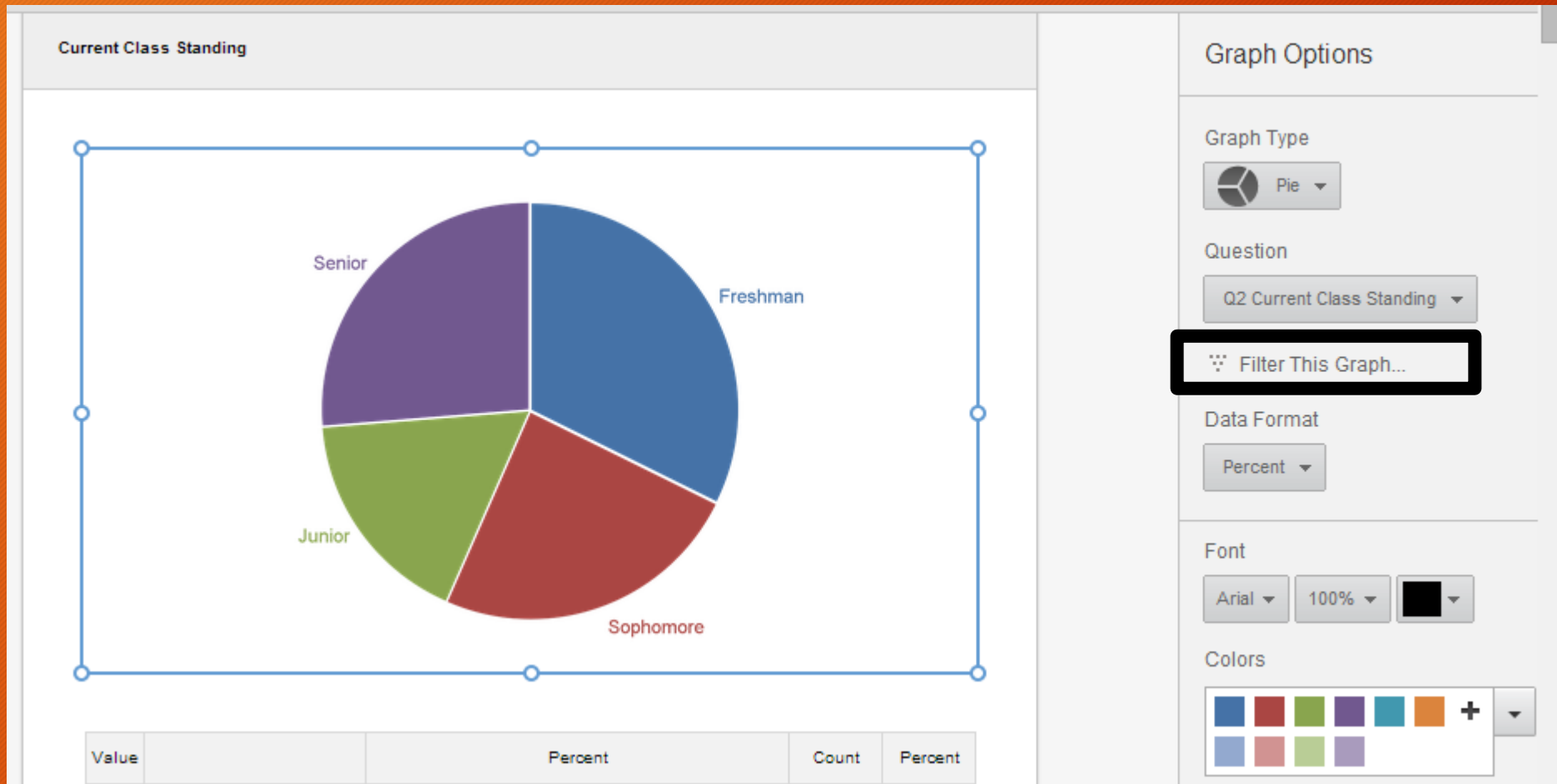
Borders & Margins...

Zoom

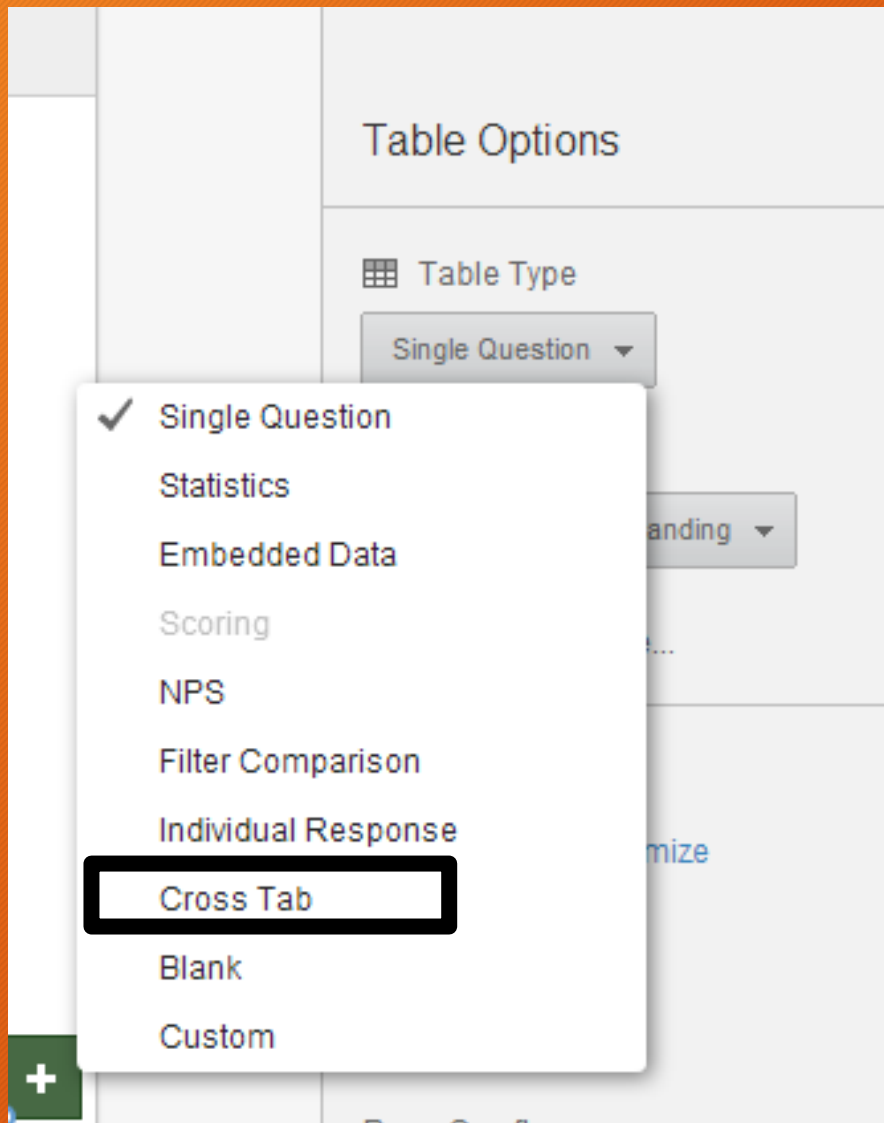
Fit Page

Snap To Grid





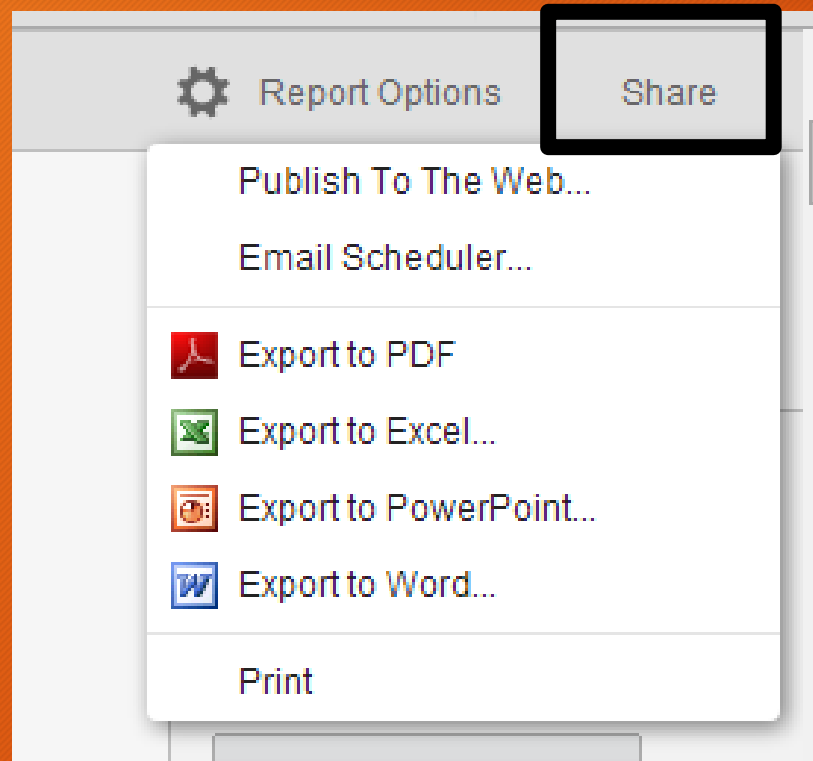
Graphs default to bar graphs but can be quickly altered to more appropriate representations by selecting the graph Filters can also be applied here



		If you were a new student at Oxy again, would you still decide to participate in athletics?	
		Yes	No
Were you recruited by Oxy Athletics?	Yes	44	4
	No	23	1

Crosstabs and other types of tables can also be inserted into Reports

Exporting Your Report



- Reports can be exported into many formats, most usefully Word or PDF format
- Please note that exporting takes painfully long, as this feature is still in beta - it really is working in the background

Paths for Further Analysis

- Download data from Qualtrics - Excel, SPSS, etc.
 - Data cleanup
 - Analysis for missingness
 - Subgroup weighting
 - ANOVA, Regression, multi-level crosstabs, t-tests, correlations