Introduction to Qualtrics

1. Log into your Qualtrics XM account, and access the projects dashboard.
2. Create a survey
   a. Click on "Create a new project" icon.
   b. Begin a new survey from template, or click on "Survey" to begin entirely from scratch. Now click, "Get started."
   c. Give your survey a title by clicking on, "Untitled Project" and typing in your own name. Respondents won't see this title as it's just for your reference in the dashboard.
   d. If you already have a survey you want to use as a template (some previous project say), you can duplicate it and work on it as if it's a new survey. Simply navigate to your dashboard, click on the ellipses to the right of the survey you want to duplicate, and click "Copy project."
   e. Click, "Create Project."
3. Create/delete survey questions and responses
   a. You begin with a generic "Q1" question under a "Default question block" (more on blocks below.
   b. Begin by clicking on the language, "Click to write the question text" to provide your own question.
   c. Click on the bubble options to write your own question answers. The default is three options.
   d. You can add or delete responses by going to the left-hand pane under, "Choices." Using the plus-or-minus signs, you can add or delete options.
   e. You can also delete a response by clicking on the response option, clicking the drop down menu, and selecting "Remove Choice."
   f. You can also change the question type (the default is multiple choice) by selecting the icon on the left-hand pane under "Question Type." There are a lot of options under question type, and I encourage you to play around with some of these.
   g. You can change the order of your question responses by either dragging a question to where you want it to go or by selecting the question you want to move, clicking the dots in the top-right corner, and selecting, "Move question" from the drop-down menu.
   h. When you're prepared to create a new question, click on the icon, "Add new question." Here you can select the question type.
   i. If you already have a Qualtrics survey which has questions you want to import rather than rewriting, you can select the icon, "Import from library"
   j. To delete a question, you can select the question and then click on the red icon to the left with the minus sign in it. Deleted questions are moved to the trash. Until you delete your trash can, you can resurrect these deleted questions.
   k. Take note what happens to your question numbering as you delete questions and move responses around. At some point, you might want to renumber your questions sequentially using the "Tools" drop-down menu under "Auto-Number Questions…"

4. Question blocks
    a. Blocks are Qualtrics' way of helping you to manage your survey's organization. You can think of blocks as working much the way a table of contents does. The cool thing about blocks, though, is that unlike a table of contents, you can get creative about the order in which respondents interact with questions within blocks.
    b. One reason to use blocks can be to separate thematic elements of your survey (a section on demographics, a section for a vignette, etc.), but they can also be used to develop survey flow, particularly if you plan to use screener questions or randomization.
    c. To add a new block to your survey, navigate to the middle of the page and select the link, "Add Block."
    d. It's a good idea to give your blocks intuitive names. You can change a block's name by clicking on "Block X" and typing a new name.
    e. You can rearrange the order of blocks by clicking the drop down menu, "Block Options" and clicking "Move Block."
    f. You can use the same drop-down menu to copy or delete blocks using the appropriate options.
5. Survey flow
    a. You have the option either to let respondents answer questions in the order they and their blocks are presented, or you can rearrange the order in which respondents see questions/blocks through the use of screener questions, randomization, etc.
    b. Let's start with the first question, make a consent form, and screen out those who decline to offer their consent to be studied.
    c. You only need two response options: "Agree to consent" and "Decline to consent."
    d. We want to navigate those who select the latter option to the end of the survey.
    e. Under "Question behavior," click "Skip logic."
    f. Notice that a logical expression is presented: "If X is selected, do Y."
    g. To screen out those who decline to consent, select under "Condition" the decline option from the first drop-down menu, and under the second drop-down menu, select "Is Selected." Then under "Skip To," select, "End of Survey" from the drop-down menu.
    h. To validate that we did what we meant to do, we can click on the "Preview" icon, select the decline option, and verify that we are ushered to the end of the survey.
    i. Now let's suppose we want to present a different set of questions to Republicans and Democrats. We need to do a few things: (1) identify partisanship, (2) screen Republicans to one set of questions, (3) screen Democrats to another, and (4) decide where to send those who identify as neither Republican nor Democrat.
    j. We can set up a screener question to capture individuals' partisanship and skip them to the relevant block of questions. Note, however, that we may have to add conditions on those block questions to make sure that partisans aren't then ushered toward questions from the other party. This might get easier using the next survey flow option.
    k. Another way to manage survey flow is to go to the top-left of the page and click "Survey Flow." This more efficiently allows us to not only manage how participants' will be managed but also simply to visualize what we'll be doing.

l. Create five blocks. The first will be titled "Consent," followed by "Demographics," "Republicans," "Democrats," and "Conclusion," respectively.
m. For each block, provide some generic questions that might go in each such as which candidates individuals will vote on, etc. But under "Demographics," provide 3 options, "Democrat," "Republican," and "Other." We'll screen Democratic responses to the Democratic block, Republican respondents to the Republican block, and Other respondents to the conclusion.
n. The logical flow of the survey should be to see the Consent page, followed by demographics, questions related to a respondent's relevant party, and then on to the Conclusion.
o. Select the "Survey Flow" tab at the top of the page. All your blocks should be listed before you.
p. Make sure that "Consent" is listed first and that you still have your skip logic such that non-consenters are ushered to the end of the survey. Next should be Demographics, followed by the party-specific blocks, followed by the Conclusion.
q. Let's make it such that Republicans are screened into the Republican block. Under the Demographics block, select the icon, "Add Below," which is in green. Next, select the icon, "Branch" in blue. Click the link that appears, "Add a Condition." Under the drop-down menu, "Question," select the question on partisanship. Under "Select Choice…" select the option for Republican. Click "Okay" in green.
r. Under the branch you just created, select, "Add a New Element Here" in green. We want to put the block of questions just for Republicans here. Select the icon, "Block." Under the drop-down menu, select the Republican block. Once Republicans move through this section, we want them to see the common block of questions, "Conclusion." So select, "Add a New Element Here" once again, choose block, and select "Conclusion." After respondents answer these questions, we want the survey to end. Therefore, select "Add a New Element Here" again, and now select "End of Survey."
s. Repeat similar steps for Democrats and those answering "Other" on party such that they skip the partisan questions and skip straight to the Conclusion block.
t. You can delete elements of survey flow as needed, duplicate, or move elements around. Just be sure to select, "Apply" before ending.
u. As a sanity check, click on the icon, "Preview," and practice clicking around through the options to make sure that respondents only see the options they should. Be careful! What will happen to individuals who "skip" your screener questions? Qualtrics needs to know!
v. To address this latter problem, let's start with the consent question. We need to require an answer to this question and disallow skipping. (By default, Qualtrics allows skipping.) Click the checkbox on your consent question. Go to the right-hand side of the window and select the option, "Force Response."
w. Now let's make sure non-respondents on party affiliation aren't shown Republican or Democratic-specific questions. Go to the Democratic block and click on the gear by your question. From the drop-down menu, select "Add Display Logic…" Select "Question" from the first drop down menu; select the party affiliation question from the second drop-down menu; select "Democrat from the third drop-down menu; and select "Is Selected" under the fourth drop-down menu. Click "Save." This

ensures only those answering they are Democrats see the Democratic block, hence bypassing skippers. Perform similar operations for the Republican block.

   x. It could make good sense to randomize the order in which questions are asked or the order in which responses are listed within questions.
   y. Rather than screen respondents to certain question blocks, you might want to use random assignment (in experimental research, for example). Let's create two new blocks after conclusion. Label these "Treatment" and "Placebo."
   z. Suppose you ask a bunch of questions in your "Conclusion" block, and you want to randomize the order in which they are asked. To the left, click on the link, "Question randomization." In the dialogue box that opens, you can select no randomization, randomize all questions, or to choose a random sample of questions to ask.
   aa. For elements within these blocks, think creatively about what exactly will be held constant versus manipulated. Perhaps it's text, images, a short video, etc. For now, just put in some place-holders—a generic question with responses for each block.
   bb. Click on the "Survey Flow" tab once again. Notice that Qualtrics shoe-horned your new blocks into the flow, and these need to be rearranged. Start with those screened into the Republican block. Between the Conclusion and End of Survey, click "Add Below" and select "Randomizer." Below the Randomizer, select, "Add New Element Here," and select Block. Pick the Treatment Block. Repeat and pick the Placebo Block so that now each are listed below the randomizer.
   cc. We only want respondents to see one of the experimental options. Under Randomizer, under "Randomly present," select "1." You can tick the box, "Evenly Present Elements" to ensure roughly the same number of individuals are screened into the treatment and placebo groups.
   dd. Perform the same steps for those screened into the Democratic block along with the non-partisans and skippers. After their treatments, individuals need to be ushered to the end of the survey.

6. Survey appearance
   a. To change how your survey appears to respondents, click on the tab, "Look and Feel." You can use a template (which after all is pretty easy), but for maximal flexibility, click on "Theme" on the left-hand side and select the option, "Blank."
   b. You can then select, "Logo" and upload your own image. For example, I uploaded the AUM logo for the polls I construct for the AUM Poll.
   c. The "Look and Feel" dialogue box also allows you to adjust color schemes, layout style, and more. I encourage you to experiment here. Just remember that you want an accessible layout that's engaging enough that respondents want to engage with it (i.e., profession) but not so busy and obnoxious they're turned away (i.e., not professional).
7. Survey Options
   a. Though you might not need to make use of it, the "Survey Options" tab has some additional options you might want to regulate for respondents.
   b. For example, do you want individuals to be allowed to use their browser's back button? (The default is "no.")

   c. Do you want to allow people to take the survey more than once? You can prevent ballot-box stuffing by limiting responses to be by invitation only, or you can prevent more than one response per IP address.
   d. Do you want individuals who stop taking the survey to be allowed to return and continue? What should the expiration date be?
8. Preview, publish, and distribute
   a. Before you publish your survey (i.e., take it live), you need to be certain you've worked out all the bugs—that the bugs are all worked out and that appearance and flow is precisely to detail. You DO NOT want to tinker with your survey once responses have already begun to roll.
   b. When you're ready and you're sure your survey is ready for distribution, you can click the icon, "Publish" at the top of the page.
   c. Next, you need to think about how your survey will be distributed. If you plan to distribute it online, you need to get a clickable link to your survey—whether you plan to send this link to users or to post it for individuals to opt-in to it. (Keep in mind you could also *not* distribute the link but instead have interviewers code responses for others either through telephone or face-to-face interviews, etc.) Click on the tab, "Distributions" to begin the process.
   d. To distribute your survey via URL, click on the icon, "Get a single reusable link." You can then distribute that link however your research design proposes (email, etc.). You can either use the link you're given or customize it by clicking on the "Customize Link" icon.
   e. In the event that you use a third-party vendor to distribute your survey, you'll want to send the survey link to this group (Amazon, YouGov, etc.). This group might also want you to embed your survey with data for their own use. You can do this through the "Survey Flow" tab, but this is beyond an introductory lesson in Qualtrics.
9. Deactivate survey, review, analyze, and export data
   a. When you've collected all the data you need, navigate back to the "Distributions" tab and click the icon, "Pause Response Collection."
   b. You can review responses either at this phase, though you can also monitor responses as they come in. To do so, click on the tab, "Reports" to see responses within the Qualtrics framework. This is a good way to get an overview of responses but is insufficient for more thorough data analyses.
   c. To download survey responses, click on the tab, "Data & Analysis." From here, you'll want to download a spreadsheet of responses, which, upon proper cleaning, you can then export to some software like Stata or R.
   d. Click on the drop-down menu, "Export & Import." Select on the option, "Export Data." A dialogue box will then open. I highly encourage you to use the "CSV" option as virtually any machine/software can read this format. You will also need to select either "Use numeric values" or "Use choice text." I generally prefer numeric values as these are easier to recode using statistical software like Stata. We'll return to this when we discuss data cleaning later in the term. Click "Download" and save your data somewhere you can find it under a file name that is intelligible enough such that you can find it later.