Qualtrics: Useful but a lot of clicking

Michael Hotard, Niklas Harder

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2 Create a survey

3 Translate and Connect a survey

4 Publish Survey

5 Manage a survey

6 Export data to Shiny

7 Links
Library questions

One time copy

- + Good way to store frequently used questions.
- - Creates a one-off copy that does not update changes in the library.

Referenced copy

- + Changes in library update all surveys with referenced copies.
- - Editing only through the library.
- - In a shared survey, library owner has to make the changes.
Timing questions

- Measures:
  - Time to first click.
  - Time to last click.
  - Time to page submit.
  - Number of clicks.

- Measure is based on browser activity.

- As good practice, always add a page break.

Useful:

```r
subset(df, select = -c(grep("Timing", names(df))))
```
Translations

- Survey translations are a strength in Qualtrics
- Support for dozens of common languages and the ability to include custom languages
- Goals:
  - Review common way to do translation
  - Review faster way to do translations
  - Tips and tricks for translations
User-Friendly(?) Survey Translation
# Faster Survey Translation

![Excel screenshot](image)

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>PhraseID</strong></td>
<td><strong>ES</strong></td>
<td><strong>Qué tan conectado usted se siente con lo que está haciendo</strong></td>
<td><strong>Siento una conexión extremadamente cercana.</strong></td>
</tr>
<tr>
<td>2</td>
<td><strong>SV_2uhZAmuSjxsWvrf</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td><strong>QID580_QuestionText</strong></td>
<td><strong>¿Qué tan conectado usted se siente con lo que está haciendo?</strong></td>
<td><strong>Siento una conexión extremadamente cercana.</strong></td>
<td><strong>Siento una conexión moderadamente cercana.</strong></td>
</tr>
<tr>
<td>4</td>
<td><strong>QID580_Choice1</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td><strong>QID580_Choice6</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>6</td>
<td><strong>QID580_Choice7</strong></td>
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</tr>
<tr>
<td>7</td>
<td><strong>QID580_Choice8</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td><strong>QID580_Choice9</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td><strong>QID602_QuestionText</strong></td>
<td><strong>¿Con qué frecuencia se siente usted como lo que está haciendo?</strong></td>
<td><strong>Nunca</strong></td>
<td><strong>Raramente</strong></td>
</tr>
<tr>
<td>10</td>
<td><strong>QID602_Choice1</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td><strong>QID602_Choice2</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td><strong>QID602_Choice3</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Translation Tips and Tricks

- Qualtrics can make custom languages for the languages that it does not have.
- Do not paste directly from Word into the language box because the formatting will be distorted. It can help to paste in a text editor or other non-formatted program before pasting into Qualtrics.
- If you make any changes to the main survey after the translation is completed, these will not be changed. This includes formatting and piped text.
- If you have the formatting correct and are doing the more manual survey translation, accessing the HTML view and pasting the text into that can be a useful way to preserve formatting.
- The survey translation download in your primary language can be a quick way to get a relatively non-formatted version of your survey questions and answers.
Web Service and Third-Party APIs

API

Qualtrics API
Web Service and Third-Party APIs

API

Application Programming Interface is way to interact with a platform or app with a script rather than in the normal interface. Examples: could send a tweet without logging onto twitter, typing the tweet, and hitting send; could access a web-hosted database to pull information; could access Yelp to get restaurant review.

Qualtrics API
Web Service and Third-Party APIs

Qualtrics API

The Qualtrics REST API allows you to communicate or query our system using a simple URL syntax. Communicating with the Qualtrics system can be thought of as a sequence of requests. You can request information to be sent to Qualtrics, updated, removed, or returned to your system. These requests can be made by either GET, POST, PUT, or DELETE requests, which return JSON responses.
Web Service and Third-Party APIs

- Qualtrics allows simple interactions with third-party APIs through its web service feature.

- This can be accessed in the survey flow or through the "Actions" tab.
Gift Card Use Case
Gift Card Use Case

Web Service

URL: https://api.tangocard.com/raas/v2/orders
Method: POST

Add a query parameter to send to web service...

Body Parameters
- application/json
  - customerIdentifier: String
  - accountIdentifier: String
  - amount: String
  - emailSubject: String
  - recipient.email: String
  - sendEmail: String
  - sender.email: String
  - recipient.firstName: String
  - utid: String
  - message: String

Custom Headers
- Authorization: Basic

Fire and Forget

Set Embedded Data
- recipient.email
- status
Checklist I/II

■ Survey flow
  ■ Set inbuilt variables in the survey flow.
    ■ E.g. Q_Language, Q_TotalDuration, Q_TerminateFlag
  ■ Correct screen-out links and messages?
    ■ Survey termination messages correct for each logic stream?
  ■ Are all email triggers working correctly?
  ■ Check survey logic and simulate data.
    ■ Tools > Review > Generate test responses
  ■ If there is randomization, does it work?
Checklist II/II

- **Survey Options**
  - Do you have or want a back button?
  - Do you (want to) prevent ballot box stuffing?
  - Do you need to protect access to the survey?
  - When and how will partial responses be recorded?
  - Are offline responses set up?

- **Survey questions**
  - Are values re-coded correctly?
  - Are questions labeled?
  - Do all questions have the right validation?
  - Timing questions and page breaks at the right position?
Email Triggers

- Qualtrics can be set up to automatically email you updates on your survey.
- This can be done every time someone completes (if it’s a rare event survey or a customer feedback form).
- It can be set up if certain survey conditions are met (e.g. a customer left a low score on a feedback form or has requested follow-up in the survey).
- These reports can include the full survey report or just certain questions.
Email Trigger

Triggers

- Send An Email On Survey Complete: Add a Condition
  - To Email Address: mhotard@stanford.edu
  - From Name: 
  - Reply-To Email: 
  - Subject: Cohort2017-July2018-Phone
  - Message:

- Finish Editing

Add Another Trigger

- Include Response Report
- Show Full Question Text

- Close Without Saving
- Save Triggers
Manage panels

- Qualtrics has a panel management add-on called Target Audience, but much of the same functionality can be found in the Qualtrics Contacts menu. Some unique features are viewing if email opened, belonging to multiple mailing lists, and a better interface for distributions and contacts.

- Panel management on Qualtrics can be done, but it is point-and-click and can be hard to establish a record or what happened and make it replicable.

- May choose to manage panels offline but use Qualtrics features to keep the Qualtrics side of things neat and tidy.
Target Audience Example
Manage panels

Normal Contact List can be used for some panel management

1. Upload list of contacts into Qualtrics Contact menu
   - Email must be included for some reason
   - ExternalDataReference should be used as the unique key.
2. Download the list to get the RecipientID
3. Add Sample Parameters that can be used to draw samples from the list
4. Add Panel Triggers to keep track of survey responses in Qualtrics
5. Update the list with any additional information you may acquire or want to provide
Workflow:

1. Write a Shiny app or a Shiny markdown document that can read URL parameters.

2. Publish you app online (e.g. through https://www.shinyapps.io/).

3. Use the new link as a redirect URL in the “End of Survey” block.

4. Manually add URL parameters to the link using embedded values.
Export data through Qualtrics API with R

Workflow:

1. Request access to API features
2. Generate and find:
   - Your access token
   - Your base URL
   - Survey ID of your survey
3. Write and publish a Shiny app or Shiny markdown document that downloads the survey data.
4. Use the new link as a redirect URL in the “End of Survey” block.
5. Combine with URL parameters if needed.
R packages for Qualtrics API

- Different R packages offer Qualtrics specific commands, but no package is available from CRAN
  - QualtricsTools
  - qsurvey
  - qualtricsR

- Today we use:

  ```r
  install.packages("devtools")
  devtools::install_github("ropensci/qualtRics")
  library(qualtRics)
  ```
Useful resources

- Overview of Javascript and Qualtrics
- Helpful Javascript and CSS for Qualtrics
- Qualtrics Community Discussions