

Qualtrics: Useful but a lot of clicking

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- 3 Translate and Connect a survey
- 4 Publish Survey
- 5 Manage a survey
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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:

```
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

The screenshot displays the Qualtrics 'Translate Survey' interface. At the top, the user is identified as 'IPL-12 for Michael'. Navigation links for 'Projects', 'Contacts', 'Library', and 'Help' are visible. The main area is titled 'Translate Survey' and shows a 'Translation Overview' for 1 of 16 questions. The selected question, 'Q6.1', is shown in two columns: the original English version and its Spanish translation. The English version asks 'How connected do you feel with the United States?' with five response options ranging from 'extremely close' to 'no connection at all'. The Spanish version asks '¿Qué tan conectado usted se siente con los Estados Unidos?' with corresponding options. A '100%' completion indicator is shown for the Spanish version.

IPL-12 for Michael ▾

Projects Contacts Library Help ⓘ

Survey Actions

< Back to Editor

Paid Translations Preview Publish

Translate Survey Translation Overview < 1 / 16 >

Q6.1 English (US) ↓	Q6.1 Spanish (Latin America) 100% ↗ ↓ ↑
How connected do you feel with the United States?	¿Qué tan conectado usted se siente con los Estados Unidos?
I feel an extremely close connection.	Siento una conexión extremadamente cercana.
I feel a very close connection.	Siento una conexión muy cercana.
I feel a moderately close connection.	Siento una conexión moderadamente cercana.
I feel a weak connection.	Siento una ligera conexión.
I do not feel a connection at all.	No siento ninguna conexión.

Faster Survey Translation

	A	B	C	D
1	PhraseID	ES		
2	SV_2uhZAmuSjxsWvrf			
3	QID580_QuestionText	¿Qué tan conectado usted se siente con la		
4	QID580_Choice1	Siento una conexión extremadamente cer		
5	QID580_Choice6	Siento una conexión muy cercana.		
6	QID580_Choice7	Siento una conexión moderadamente cer		
7	QID580_Choice8	Siento una ligera conexión.		
8	QID580_Choice9	No siento ninguna conexión.		
9	QID602_QuestionText	¿Con qué frecuencia se siente usted como		
10	QID602_Choice1	Nunca		
11	QID602_Choice2	Raramente		
12	QID602_Choice3	A veces		

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 **P**rogramming **I**nterface 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

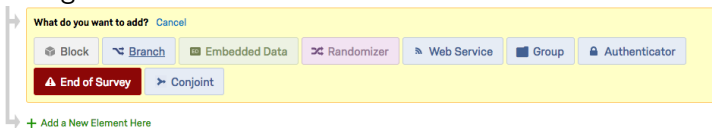
API

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.

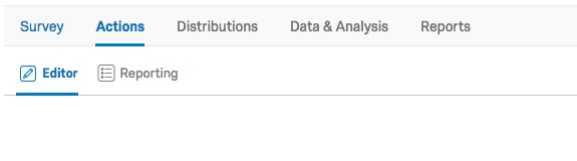
Web Service and Third-Party APIs

- 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

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Gift Card Use Case

Web Service

URL: Test

Method: GET

[Add a query parameter to send to web service...](#)

[Add a custom header to send to web service...](#)

Fire and Forget

Set Embedded Data

[Add Embedded Data...](#)

Add Below Move Duplicate Delete

+ Add a New Element Here

Gift Card Use Case

The screenshot shows a 'Web Service' configuration window. At the top, the URL is 'https://api.tangocard.com/raas/v2/orders' and the method is 'POST'. The body parameters are set to 'application/json' and include fields like 'customerIdentifier', 'accountIdentifier', 'amount' (set to 5), 'emailSubject' (set to 'Your \$5 Gift Card from NaturalizeNY'), 'recipient.email' (set to a field reference), 'sendEmail' (set to true), 'sender.email' (set to 'naturalizeny@stanford.edu'), 'recipient.firstName' (set to 'Michael'), 'utid' (set to 'U561593'), and 'message' (set to 'Thank you for completing the survey!'). Custom headers include 'Authorization' set to 'Basic'. Below the main configuration, there are options for 'Fire and Forget', 'Set Embedded Data', and a field for 'recipient.email' mapped to a field reference. At the bottom right, there are buttons for 'Add Below', 'Move', 'Duplicate', and 'Delete'.

Web Service

URL: **Test**

Method: **POST**

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

Body Parameters

customerIdentifier	=	String	<input type="text"/>	-	+
accountIdentifier	=	String	<input type="text"/>	-	+
amount	=	String	<input type="text" value="5"/>	-	+
emailSubject	=	String	<input type="text" value="Your \$5 Gift Card from NaturalizeNY"/>	-	+
recipient.email	=	String	<input type="text" value="{\$e://Field/email}"/>	-	+
sendEmail	=	String	<input type="text" value="true"/>	-	+
sender.email	=	String	<input type="text" value="naturalizeny@stanford.edu"/>	-	+
recipient.firstName	=	String	<input type="text" value="Michael"/>	-	+
utid	=	String	<input type="text" value="U561593"/>	-	+
message	=	String	<input type="text" value="Thank you for completing the survey!"/>	-	+

Custom Headers

Authorization	=	Basic	-
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Fire and Forget

Set Embedded Data

recipient.email	=	<input type="text" value="recipient.email"/>	-	+
status	=	<input type="text" value="status"/>	-	+

[Add Below](#) [Move](#) [Duplicate](#) [Delete](#)

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:

From Name:

Reply-To Email:

Subject:

Message:   Font - Size - **B** *I* U  More...

When:

Include Response Report

Show Full Question Text

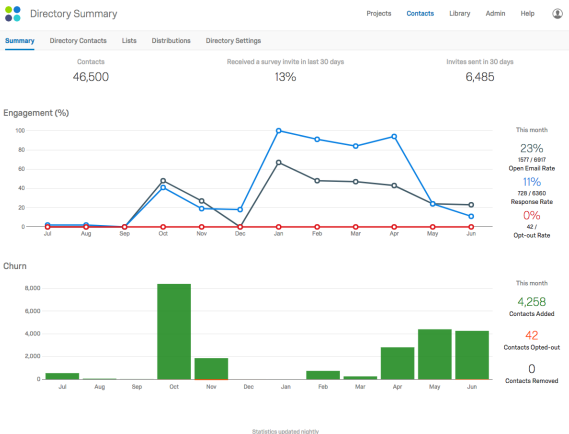
[Finish Editing](#)

[Add Another Trigger](#)

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

URL Parameters

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:

```
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