This is a survey, and we’re going to use it to learn a bit about survey tools.

At York there are two main survey tools on offer: Google Forms and Qualtrics. This that we’re in now is a Qualtrics survey. And, for comparison, here’s a Google Form survey (should open in a new tab).

At its simplest, the two tools can be summed up as follows:

Google Forms

- Quick and easy to use
- Can be locked down to University of York members
- Can collect York email addresses if log-in is enabled
- Can output in real time to a Google Sheet.

Qualtrics

- Has far more question types than Google Forms, and advanced branching options
- Can pick up embedded data from a pre-populated contact list, allowing you to include information you already have about a person without having to ask for it again
- Can be distributed by timed email, with options for follow up and reminder based on who has responded
- Can be used to design, produce and mail out regular reports.

Before we learn a bit more, we’ll look at a quick example survey. This survey is replicated (as far as is possible) in the Google Form example mentioned above.

Be aware that any answers you enter will be publicly visible, but they’ll also be anonymous.
This is our Qualtrics survey.

Isn't it good?!

Yes - we styled that in Comic Sans. We can play around with the text as much as we like. We can even use stylesheets and javascript if we want.

This is Question 1

Question 1 is a required question. Try not answering it.

This appears when you've chosen answer 1 (something we can't do in Google):
What should we call the cat?

This appears when you've chosen answer 2 (something we can't do in Google):
What should we call the dog?
This is a page that you get if you choose answer 1.

Here's \(q://QID3/ChoiceTextEntryValue\).

That's pretty clever, yes?

Again it's something that Google Forms can't really do.

There's a lot of other question types and features that Qualtrics has. We'll take a quick look at them later.

**Dog Block**

This is a page that you get if you choose answer 2.

Here's \(q://QID4/ChoiceTextEntryValue\).
What do you think of that, hmm?

<table>
<thead>
<tr>
<th></th>
<th>Rubbish</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
</table>

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**Free text block**

Here's another section

Any other business?

Type anything you like in here, but be aware that people will be able to read it.

Oh, and *don't*, whatever you do, type the word "Lancaster".
Ok... how do we make a Qualtrics survey?

You can sign into Qualtrics from the IT Services website at www.york.ac.uk/it-services/services/qualtrics/ (or, if you're lazy, Googling york it qualtrics usually does the trick).

Clicking the "+ Create Project" button in the top right will get you started with building a new survey.

You can choose different question types from the side menu, and then fine-tune the settings for that question:
Questions can be arranged in "Blocks" - effectively different pages of your survey. You can use display logic and skip logic to display questions based on a condition or to jump to different blocks. More options can be found in the Survey Flow - one of the links at the top of the screen:
This survey is pretty linear, except for the branching where you chose between the dog and the cat:

Note the option to add Embedded Data. We'll look at that later.

Returning to the top menu, don't forget to play with "Look & Feel" and "Survey Options", too, to tailor how your survey behaves.

There's also a "Preview Survey" button which lets you preview your survey at any time.
If we want to do a quiz, we can do that too.

The "Scoring..." option sits under the Tools menu, and lets you set weightings for your questions.

We can then set the scores we want to allocate for each answer:
Which of these is not an old name for York?

- Jórvík
- Yeovil
- Eboracum
- Eoforwic

Contacts, embedded data and distribution

Congratulations, you got $\text{Score}$ pts - we're being very generous there by including 5pts for the cat and dog question.

The score uses a particular syntax called 'Piped Text'. We can use the same method to tell you that $\text{ChoiceTextEntryValue}$ is currently wanting to go out into the garden.

You can do quite elaborate stuff with Piped Text if you really want, including "Loop and Merge" which lets you ask the same questions over and over while changing just a few details. For instance, if you wanted to know peoples' opinions of the characters from Winnie-the-Pooh, you could set up a Loop and Merge that ran through the same core questions but showed "Winnie-the-Pooh" first time, then "Piglet", then "Eeyore", then "Kanga" etc.
Piped Text also lets you personalise your survey. If you have a specific set of people you want to complete the survey you can set up a panel of contacts (there's a "Contacts" link in the top right of Qualtrics).

Here's an example of a contacts panel made up of contestants from the 1977 Eurovision Song Contest. Each contact has a first name, last name and email address, plus some additional embedded information - all of which we can pull into the survey, should we wish. Contact lists can be populated from a spreadsheet file.

We could add an embedded field to the Survey Flow to collect any embedded information, and we can use that information to populate question text, for instance (using the above example) to ask Anita Skorgan if she was happy with her 18 points.

In the example below, the Country and Song fields from the panel above are being harvested as survey responses, which means we don't have to ask people for information we already know.

This technique relies on us distributing our survey by email. Qualtrics lets you email to your contacts, and keeps you updated as to the responses you’ve received. Reminders
and thankyous can be sent automatically.

You can do this even if you anonymise your responses (which, in most cases you really probably should do). To anonymise responses, check the "Anonymize Response" option in the Survey Options.

If you don't want to use contacts, a simpler option for distributing your survey is to use an anonymous URL, much as Google Forms does. All the distribution options are found on the Distributions tab on the top left of the Projects screen.

Analysis

Data & Analysis

The Data & Analysis tab lets you analyse your data at a glance. In the example below, we've started marking up the responses to the free-text question we had earlier.
The Reports tab in Qualtrics lets you create reports which you can then share or mail out periodically. Reports are easy to generate, though you might need to tweak the settings to suit your needs (for instance, the way we assigned points to the quiz question means that we have to fine-tune how its results get interpreted in order for them to be meaningful).

It's a good idea to test your survey before you distribute it (there's a "Test Survey..." option in the Tools menu) and then have a look at the default report to see if things are working as you'd expect.

We've produced a live report for this survey, which you can look at. Maybe compare it with the Google Form responses.
You can also download your data as a .csv file, though again you may need to tweak the settings to get things looking as you need.