Qualtrics

**Blocks, Piped Text, Loop & Merge, and other advanced features**

**Block Basics**

All survey questions are created, edited, and stored inside blocks. Every survey includes at least one block initially called the Default Question Block.

Three elements appear in every block:

1. **Block name**: Change at any time by clicking in the name box and typing a new name.
2. **Add Block**: Lets you create new blocks.
3. **Block Options menu**: Displays an array of one-click block editing choices.

Blocks are best understood with a couple of examples:

- Many surveys start with an initial Demographics block which directs different respondents (e.g., male/female, younger/older, education, etc.) to distinct survey question blocks that precisely target their needs.
- Additionally, you could channel the various demographics down different survey pathways (i.e., one path for men and another for women) with Branch Logic.
- You can opt certain respondents out of the survey based on quotas achieved for a specific demographic (i.e., quotas based on age, gender, or income level).
- Finally, you could display different survey endings to different demographic groups.

**NOTE**: For simple surveys, placing all of your questions in a single block is just fine. But as surveys become more intricate, organizing questions into multiple blocks allows the application of sophisticated Survey Flow logic, branches, randomization, authentication, and Embedded Data logic.

Visit the [Block Options](#) page to learn how to take full advantage of blocks in building sophisticated Survey Flows.

**Piped Text**

With Piped Text, you can customize question and answer choice wording for each respondent, allowing each of them to have a customized, dynamic, and personal survey experience. Piped Text is a line of code you add to your survey that pulls information from different sources and displays that information to the respondent (or can be used in Display Logic, Embedded Data, and other areas).

Though Piped Text appears as a line of code in your survey editor, when respondents take the survey, this code will be replaced with the specified content.

The piped text menu can be accessed when writing a question by clicking on the [Piped Text](#) tab. It can also be accessed in the answer choice text by clicking the blue arrow next to a choice and selecting ‘Insert Piped Text’.

**Generating Piped Text**
In the **Piped Text** menu, choose which type of Piped Text you want and specify the particular item you would like to insert.

The most common use of piped text in surveys and forms is from a previous question within the survey or form. To generate this type of piped text complete the following steps.

1. Open the **Piped Text** menu.
2. Select **Survey Question**.
3. Select the question to pipe from.
4. Select the specific content from the question that you would like to pipe.

**NOTE:** The piped text will be inserted into your survey/form as a signified by a code with a dollar sign and brackets. This code will not show to the respondent, only the resulting text will be displayed.

**Possible Values for Text Piped from a Question**

In step 4 of the above example, you’ll notice a number of possible values that can be piped into your survey.

- **Question Text:** Pipes the question a respondent sees when taking the survey.
- **Description:** Refers to previous answer choice text. For example, if they select “Less than 1 month – Description,” the Piped Text would bring in “Less than 1 month.”
- **Text Entry:** Pipes any text a respondent enters. For example, if your respondent picks “Other” and types in “Three Years,” the “Other (Text Entry)” Piped Text would bring forward “Three Years.”
- **All Choices – Displayed & Hidden:** Pipes in every single answer choice in the question.
- **Displayed Choices:** Pipes in only the choices the respondent saw. See our page on adding display logic to answer choices for more information on hiding and revealing choices to respondents.
- **Undisplayed Choices:** Pipes in only the choices the respondent didn’t see. See our page on adding display logic to answer choices for more information on hiding and revealing choices to respondents.
- **Selected Choices:** Pipes in only the choices the respondent selected.
- **Unselected Choices:** Pipes in all the choices the respondent didn’t select.
- **Selected Choices Recode:** Pipes in the recode value assigned to any selected choice.
- **Entered Text:** Pipes in the text that the respondent entered in an answer choice text box.
- **Selected Count:** This option is only helpful for Multiple Choice questions set to **Multiple Answer**. This option will show how many answers someone selected for a multiple choice question.

**Branch Logic**

Branches are useful when you want to send respondents down different paths in the survey. You can use Branch Logic to branch respondents to different Survey Flow elements based on variables like question responses or Embedded Data.
It’s a bit like a ‘choose your own adventure’ novel. Depending on how your respondents answer certain questions, they will take different routes through your survey.

**Example:** You can use Branches to show one block of questions to survey respondents who live on campus and a different block of questions to respondents who don’t.

![Survey Flow](image)

**Tip:** Branches are best for when you want to selectively show a whole block of questions. If you need to hide a small number of questions, consider using **Display Logic**. If you want to skip respondents to the end of a survey or to a question within the same block, consider using **Skip Logic**.

Detailed instructions on adding branches can be found [here](#), however here is breakdown of the necessary steps:

1. While in your survey click on ‘Survey Flow’
2. Click on ‘Add Below’ or ‘Add a New Element Here’
3. Click on Branch

![Add a Condition](image)

4. Click on ‘Add a Condition’ and add a logic condition, ex.) One based on a question response being selected.

5. Create or move a new element (such as a block) underneath the branch.

![Additional Questions](image)

6. Now in this example, only respondents who select ‘On-Campus’ will be shown any of the questions or items in the additional data block. Those who do not select ‘On-Campus’ will not see any of the questions or items from that block.

7. Repeat these steps for any additional branches that are needed.
**Loop & Merge**

Loop & Merge allows you to take a block of questions and dynamically repeat them multiple times for a respondent. For example, you may have a question that allows respondents to select multiple departments that they have visited in the past thirty days. Loop & Merge would allow you to ask a set of questions for each department selected without having to retype each question over for each possible response.

**Turning on Loop & Merge**

1. In the Survey tab, click **Block Options** for the block you want to repeat and select **Loop & Merge**
2. Click ‘Turn on Loop & Merge’, once Loop & Merge is turned on you can specify how your block of questions will be repeated. Choose to loop based on questions, numbers, or predetermined fields.

The next step is creating and understanding Loop & Merge Fields. Each time you turn on Loop & Merge, you create Loop & Merge Fields. These fields are used to create dynamic text that is different for each loop.

Each loop has its own set of fields. Field 1 is the “name” of the loop. To make Field 1 equal to the answer choices of a question you created, select Loop based off of a question and click on save.

Now you can insert Field 1 in to each question in the block for which Loop & Merge is turned on for. The questions in that block will repeat over and over for each selected response. If you do not want a question to repeat for each selected response you should move that particular question to a different block for which Loop & Merge is not turned on.
Embedded Data

Embedded data is any extra information you would like recorded or used in your survey or form. For example you may want to insert previously gathered information from a contact list into a question via the piped text option.

To create an embedded data element you will need to do the following:

1. Select ‘Survey Flow’, located in the survey tab
2. Click on the ‘+ Add a New Element Here’ link toward the bottom of the survey flow.
3. Choose the ‘Embedded Data’ option.
4. You will now choose to create a new field or to select an option from the dropdown menu. For this example we will be choosing ‘Add from Contacts’ from the dropdown menu.
5. Select your contact list and a preview of the fields will appear. Click on OK to proceed.

The embedded data fields are now ready to be used in your survey/question creation. When entering the text, simply use the insert piped text menu and select the ‘Embedded Data Field’ option.

NOTE: Embedded data does not show in a survey preview. To test embedded data consider sending an initial email to yourself and perhaps a colleague or two.
Quotas

Quotas allow you to keep track of how many respondents meet a condition in your survey or to remove options from being displayed once a limit is reached. You can also specify what will happen to your respondents once a quota has been met, such as ending the survey prematurely or deleting the extra responses.

The purpose of a quota is to make sure that you gather only the exact amount of data or responses required for your study or form. For this training example we will be using a quota with display logic to remove choices from a question once a limit is reached. For other ways to use Quotas please visit this Qualtrics page.

Creating Quotas

1. In your survey tab, click on ‘Tools’
2. Select ‘Quotas’
3. Click ‘Add a Quota’ or ‘Add Quota’
4. If prompted select between Simple Logic and Cross Logic Quotas, you can read the difference between the two at the linked pages. If you are not given a choice, then you are likely working with Simple Logic Quotas.
5. Click the New Quota text to type over and rename your quota. This will be of great benefit when having multiple quotas as it will help you differentiate and select the correct one.

Now that you have created a quota you will need to set a quota limit and conditions. As mentioned prior, for this example we will be using simple quotas with display logic to remove choices once a limit is reached.

Setting Quota Limits and Conditions

1. When you created your new quota a default limit of 100 was automatically entered. To change this simply click on the ’100’ and type in your desired quota.

2. Next you will need to set a condition from which your quota will increment. For this example we will be using a response choice from a registration question.

Repeat the above steps to create and set quotas for each question and/or response you will need.

Using Display logic with quotas

To remove a response choice once a quota is met you will need to add display logic to that specific choice.

1. Click on the specific answer choice for which you want to add display logic connected to a quota for.
2. From the drop down arrow for that choice, select ‘Add Display Logic…’
3. Now you will need to set your condition.
   a.) First select the type – Quota
   b.) Then select the quota name you want the display logic to be connected to
   c.) Then select the condition – for this example we will be using ‘Has Not Been Met’ so that the option is only displayed if the quota is not full (space is still available.

You can now repeat these steps to connect additional answer choices to display logic and quotas.