# Qualtrics Data Review – Tip Sheet

## Background

### Optional Viewing Rights

- The CalFresh Healthy Living, University of California (CFHL, UC) State Office received requests to enable viewing ‘rights’ for evaluation data entered into Qualtrics portals; along with that, State Office wanted to allow county programs to access the reporting function of Qualtrics.
- Rights are granted to supervisors/managers/advisors *who want them*. This is not required.

### Benefits

- Track progress of what and how much data has been entered - especially beneficial when multiple staff complete data entry
- Review accuracy of entered data

### Rights and Restrictions

- *Right to view your data* – You will have the ability to view all of the data that have been entered by CFHL, UC county/cluster programs in Qualtrics portals.
- *Restrictions on editing* – You will not have access to editing and deleting capabilities because we cannot limit your access to your specific county/cluster’s data.
- To fix data entry errors, contact either Barbara bmknelly@ucdavis.edu or Angie akeihner@ucdavis.edu.

### Surveys Currently Collected through Qualtrics as of FFY 2021 Include:

- CATCH Lesson Observation Tool (CATCH LOT)
- Cooking Academy
- Eating and Activity Tool for Students (EATS) for Middle and High School
- Food Behavior Checklist combined with APAS (FBC+PA)
- Healthy Happy Families (HHF)
- Intent to Change (ITC) surveys (**FFY2020 only, in PEARS for FFY2021**)
- Making Every Dollar Count (MEDC)
- Playground Stencil Assessment – scan and teacher surveys

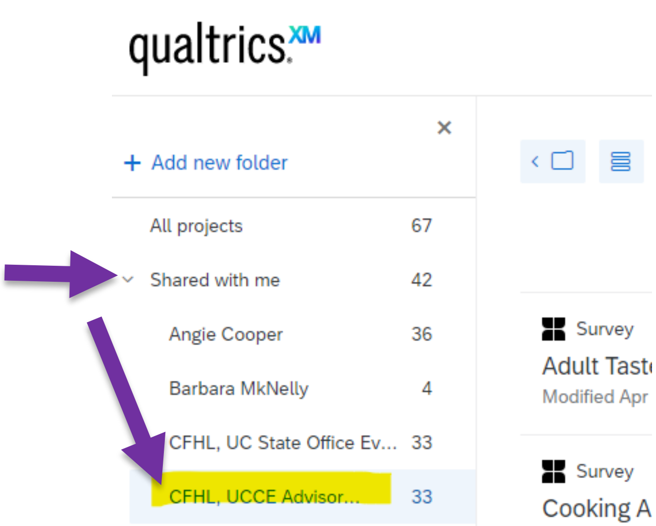
- Taste Test Tools (TTTs) – youth, adult, large group, pre-K
- Teacher Observation Tool (TOT) and Physical Activity TOT (PA TOT)
- Teens as Teachers
- Youth-led Participatory Action Research (YPAR) – pre/post, retrospective, and assessment

## Obtaining Viewing Rights

### Obtaining viewing rights

1. Sign up for a Qualtrics account **through the UC Davis portal** - https://itcatalog.ucdavis.edu/service/qualtrics-research-suite-online-surveys
    - Even if you already have a Qualtrics account through UC ANR, you need to sign up for an account *through UC Davis* **and** *with your @ucdavis email* in order for us to enable you to view your data
2. Email Angie akeihner@ucdavis.edu indicating that you have signed up for an account and include your @ucdavis email
3. An email announcement will come from Qualtrics to indicate that you have been added as a “collaborator”

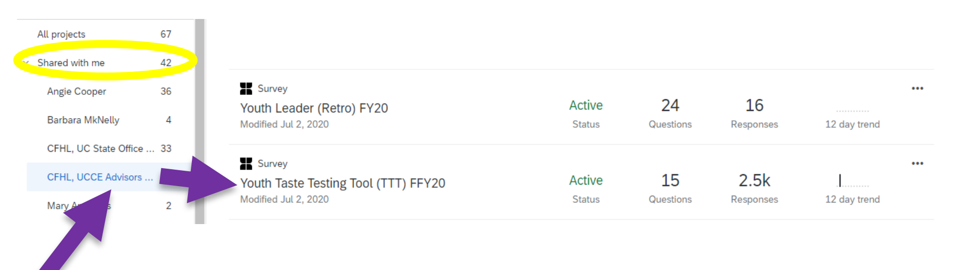
## Viewing Your Data



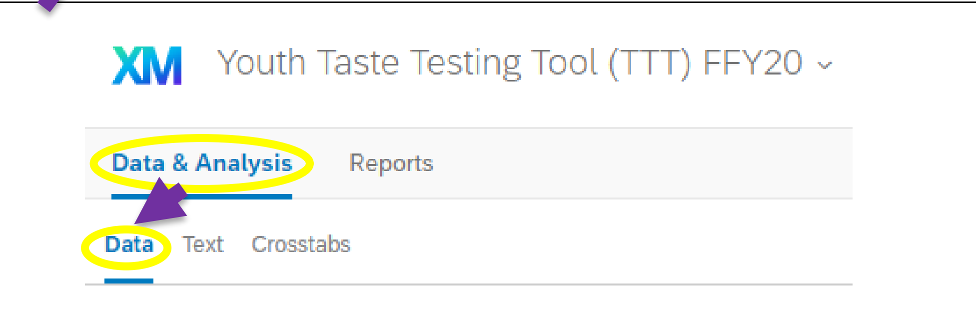

### Viewing Your Data after Obtaining Viewing Rights

1. Sign in through the UC Davis Qualtrics link: https://ucdavis.qualtrics.com
2. Click on “Shared with me” in the upper left

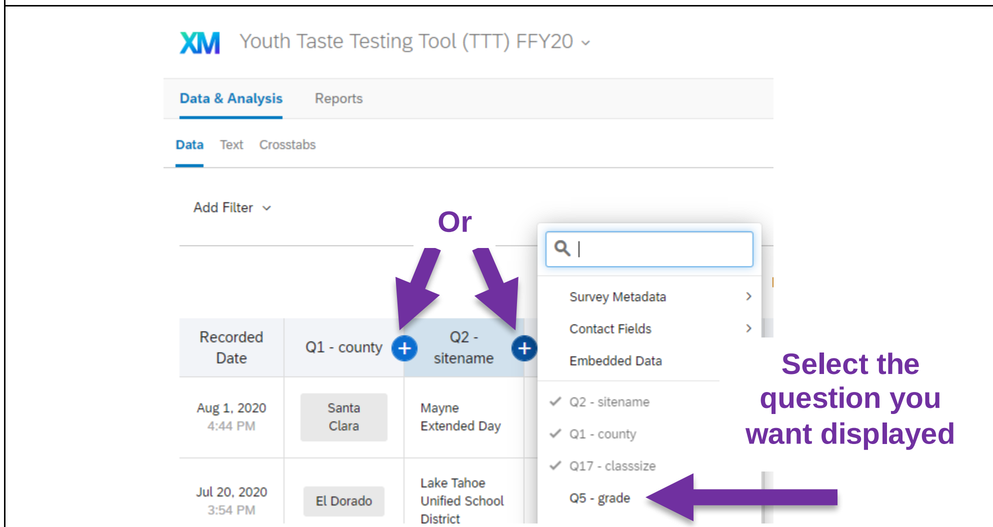
**NOTE:** *ALL CFHL, UC Qualtrics surveys are shared once you are added as a “collaborator.” Therefore, you might see surveys that your county/cluster program does not collect in the “shared with me” folder.*




3. Under the “Shared with me” folder, click on the survey that you want to see.



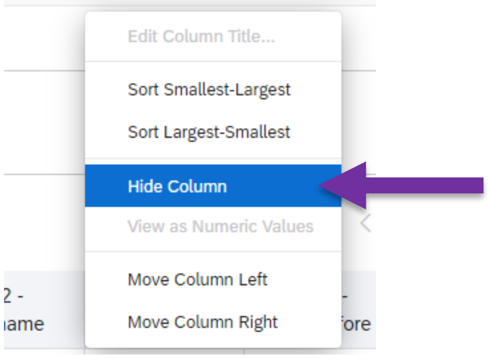

4. After clicking on a survey, you will be taken to that survey page. [for this example, we are using the Youth Taste Test Tool (TTT)] There should be two options at the very top: “Data & Analysis” and “Reports”
5. Click on “Data & Analysis.” You will then have another three options, “Data,” “Text,” and “Crosstabs.” We will only be using the “Data” tab.
6. Choose “Data.”




## Add a Column Not Currently Displayed

Qualtrics automatically adds certain questions to your initial view of the data. It is easy to customize your data view by adding new questions or hiding questions that you are not interested in viewing. To *add* a column for a specific question *not currently displayed* on your screen:

1. Hover your mouse over a column title where you would like to add a column.
2. Click on the “+” button that appears (left or right, depending on where you want the new column to appear).
3. Select the question that you want to add to the current data view.

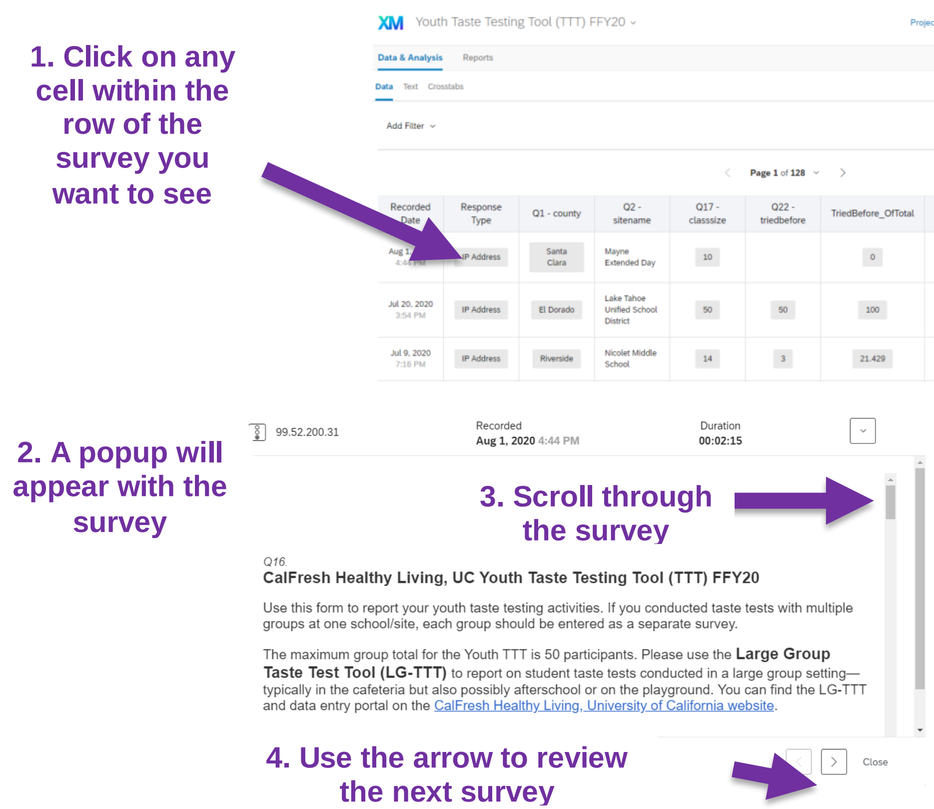



## Hide a Column Currently Displayed

To *hide* a column for a specific question that *is currently displayed* on your screen:

1. Click on the column title that you would like to hide.
2. Select “Hide Column” from the menu that pops up,

## Viewing One Survey at a Time




## Viewing One Survey at a Time

If you would like to review the accuracy of a single survey’s data, the easiest way to do this is to view the individual survey, instead of adding each question column to your viewing screen and scrolling through.

1. Double click on any cell within the row of the case you would like to review.
2. A pop up will appear with all of the responses for the case you clicked on.
3. Scroll through the participant responses to review the data entered.
4. Click on the arrow located at the bottom right corner of the survey to move to the next (or previous) participant’s survey to continue your review.

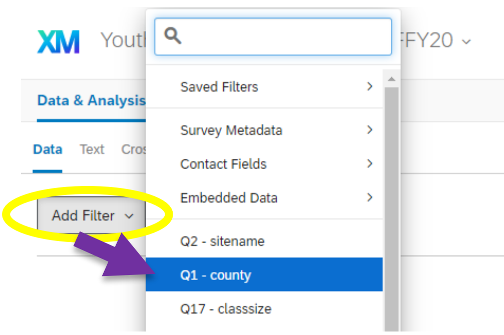
# Filtering the Data

**1. Field** **2. Operator** **3. Operand**

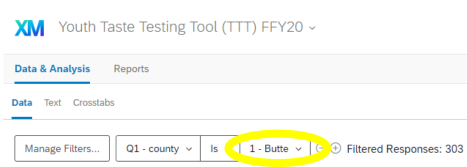

## Introduction to Filters

Filters allow you to define when a respondent's data should be included in what you are viewing. Filter conditions have three parts: the field, the operator, and the operand.

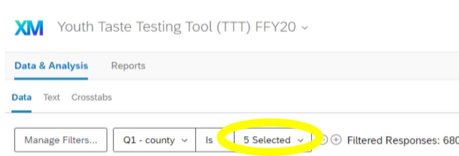
1. The first drop down menu is the field. *You will probably only use <u>question</u> fields*.
2. The second drop down menu is the operator. The operator determines how the field relates to the final segment (the operand).
3. The third, and final, drop down menu is the operand. An operand is the value you want to include or exclude in the filter condition.




**Filter for one county**




**Filter for a cluster**



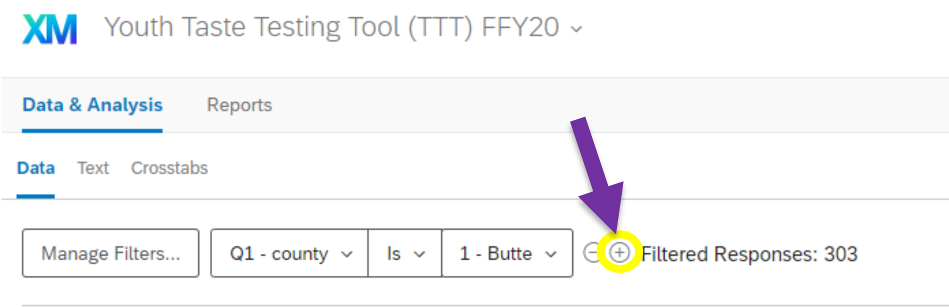

## Filtering for Your County

You will be able to see the data for all UCCE programs that have submitted surveys. Therefore, the first step you should take when reviewing your data is to filter for your county.*

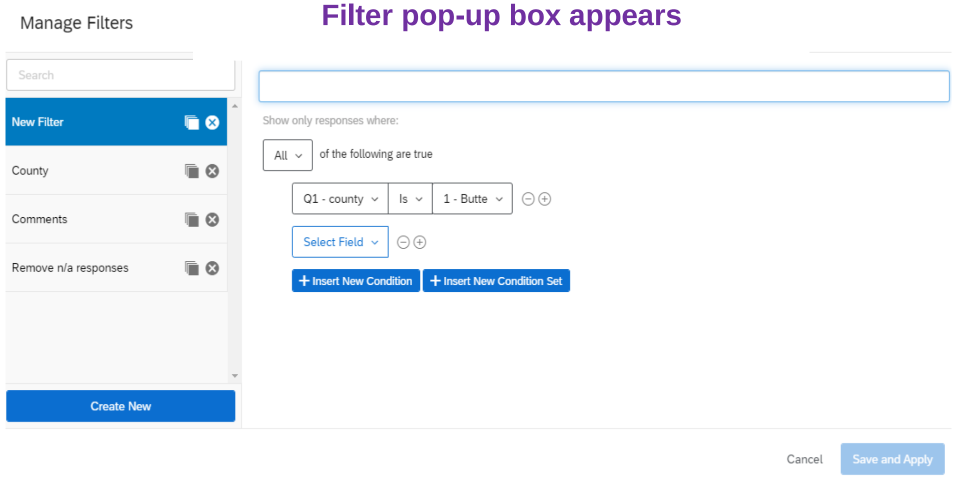
1. Click on the "Add Filter" drop down.
2. Select "county." Your filter should now appear, with just the first drop down (the field) filled in.
3. Choose "Is" in the second drop down (the operator).
4. Select your county, or multiple counties if you are a cluster program, from the third drop down (the operand).
5. You should now see data only for the county or counties that you selected. Next to your filter, the number of surveys (Filtered Responses) that apply to the county or counties that you selected will appear.

***<u>NOTE</u>**: *Please remove this filter when you are done viewing your data so that others can add the filter(s) that they need. Instructions for removing the filter(s) are at the end of this tip sheet.*

**Click on the + sign to add another filter condition**



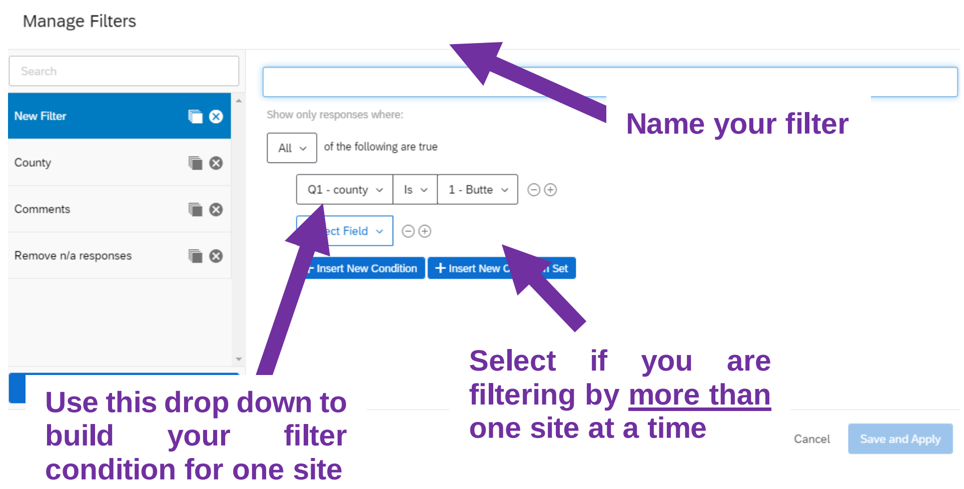

**Filter pop-up box appears**




## Filtering by Site

If you would like to view your data by site, the instructions are similar to above. The difference is that site is an open-ended question, so you will have to type in your site's name. Keep in mind, however, that site names are sometimes misspelled and/or abbreviated in different ways from one survey entry to another, depending on the person(s) entering the survey data. For this reason, you may want to sort your data by site before you filter by site. See the next section for how to sort your data.

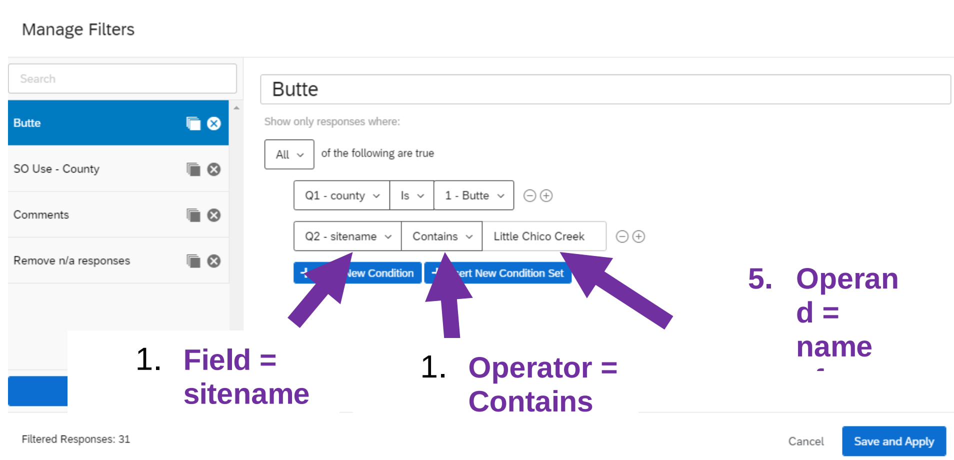
1. Click on the "+" sign to the right of the county filter condition that you created in the above step.
2. This time, a pop-up box will appear, with the county filter condition that you already created.




3. Name your filter
4. If you are only going to filter for **one** site at a time: Use the provided drop down to build your filter condition → go to the **Filtering by One Site** section.

   **BUT**

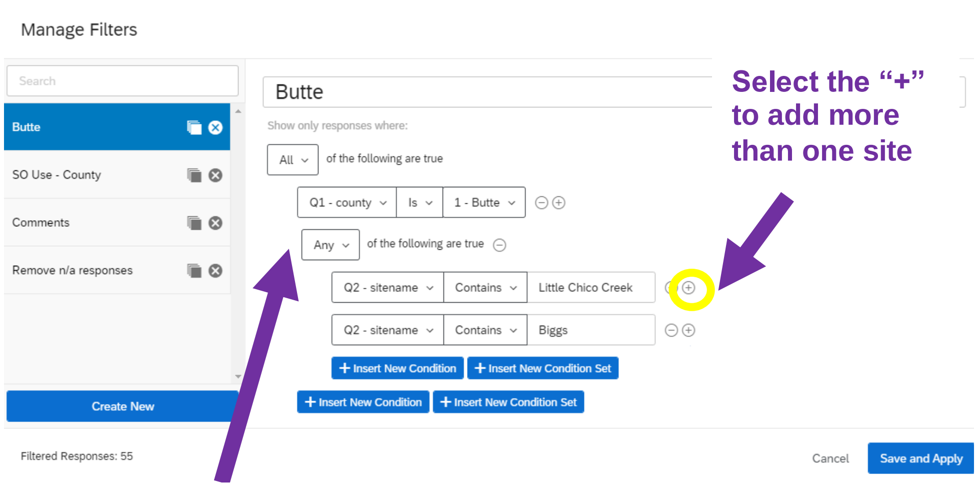
   If you are going to filter for **more than one** site at a time: Select "Insert New Condition Set" → **Filtering by More Than One Site** section.




## Filtering by One Site

5. Use the provided drop down to choose for the:
   a. First drop down = "sitename"
   b. Second drop down = "contains"*
   c. Third drop down = name of the site
6. Click "Save and Apply."
7. You should now see data only for the site that you selected. Next to your filter, the number of surveys (Filtered Responses) that apply to the site that you selected will appear.

***NOTE**: *For Text Entry questions, the operators can be "Is," "Is not," "Contains," or "Does not contain." However, "contains" will probably be the best option to choose because site names may not have been entered exactly the same. If you need to include additional site names to your filter to capture misspelled site names, use the **Filtering by More Than One Site** instructions below.*

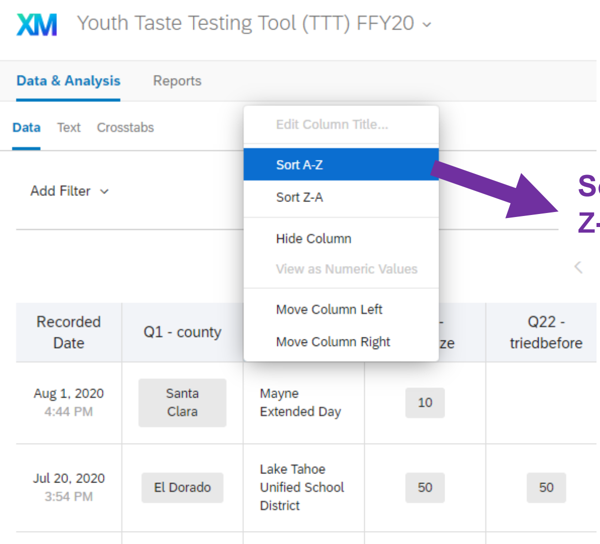



**Make sure that "Any" is**

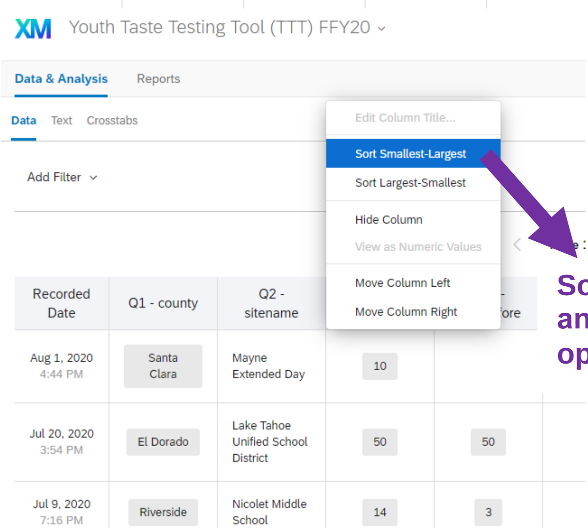
## Filtering by <u>More Than One</u> Site

5. After you've selected "Insert New Condition Set," make sure "Any" of the following are true is selected.
6. Then, choose for the:
   a. First drop down = "sitename"
   b. Second drop down = "contains"*
   c. Third drop down = name of the site
7. To add another condition (i.e., another site), click the "+" sign and follow the above steps. Repeat these steps again (as needed) to add all relevant sites.
8. Click "Save and Apply."
9. You should now see data only for the sites that you selected. Next to your filter, the number of surveys (Filtered Responses) that apply to the sites that you selected will appear.

# Overview of the Data: Sorting




**Sort "Sort A-Z" and "Sort Z-A" option for site name**



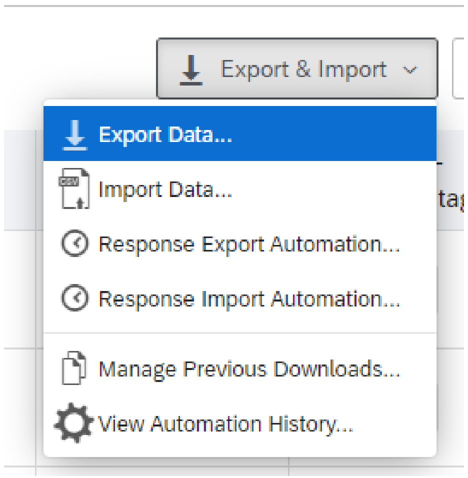

**Sort "Sort Smallest-Largest" and "Sort Largest-Smallest" option for class size**

## Sorting

If you want a quick overview of your data, you can sort the data with or without having a filter applied.

1. Click on the column header
2. Choose how you want to sort the data – depending on the question type, you may have a "Sort A-Z" and "Sort Z-A" option or a "Sort Smallest-Largest" and "Sort Largest-Smallest" option.

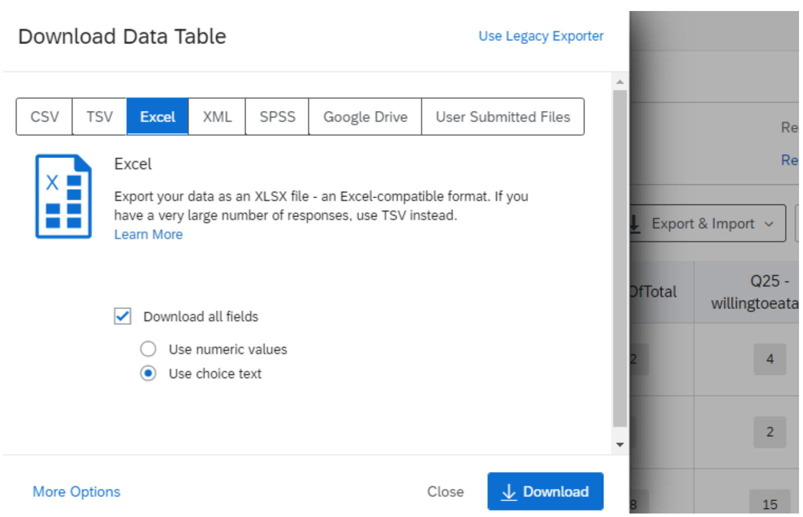
# Downloading Your Data



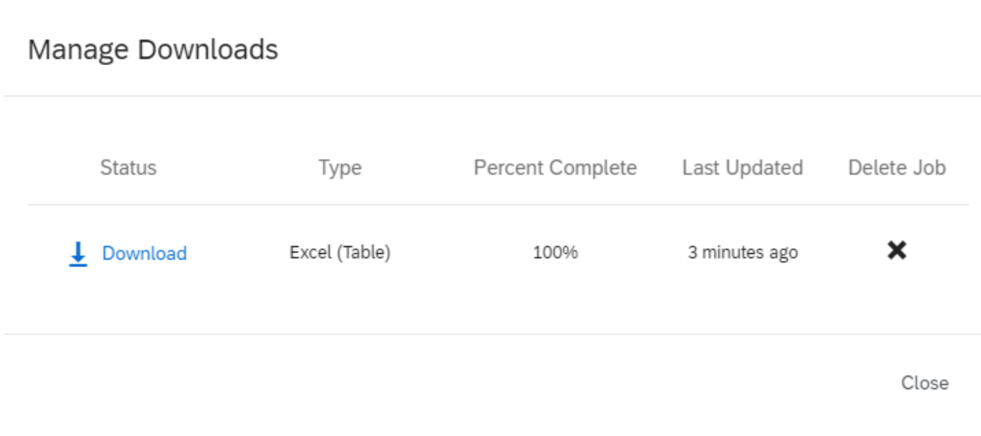

## Downloading Your Data

Once you have your data filtered how you want it, you can download the data.

1. To download your data, click on the "Export & Import" drop down and choose "Export Data"

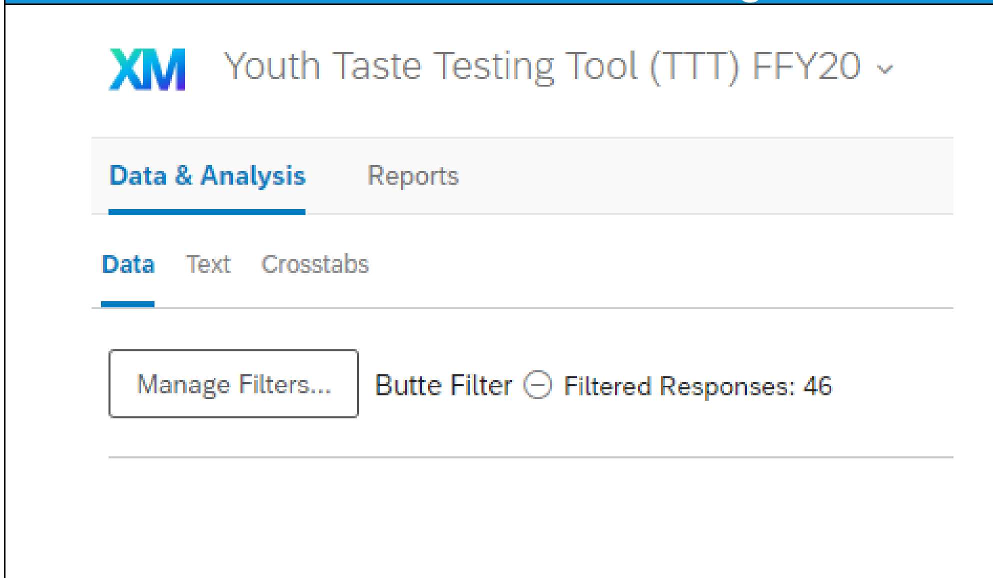



2. A pop up box will appear. Click on the "Excel" tab. (unless you have a specific reason for wanting the data downloaded in a different format, it is recommended to use Excel)
3. "Download all fields" and "Use choice text" should both be checked/selected.
4. Click "Download."



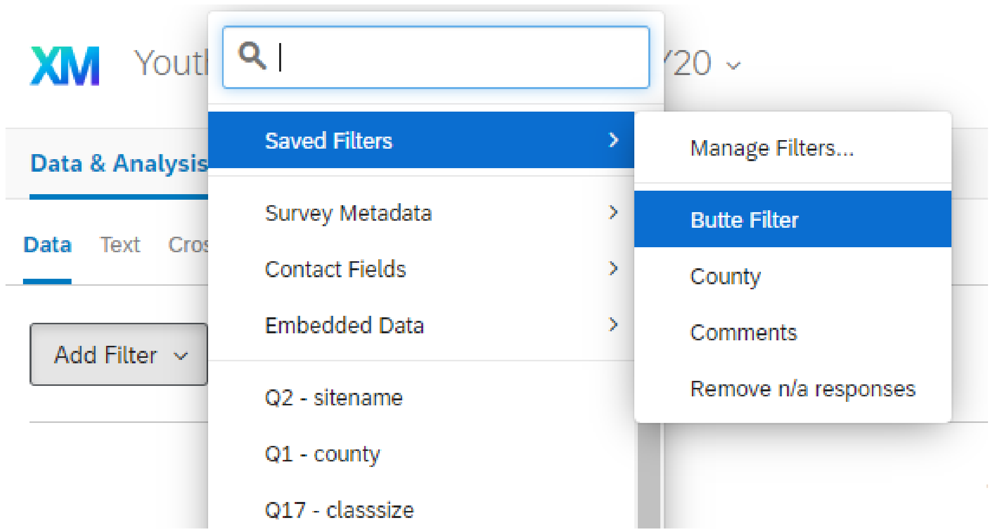

5. A “Manage Downloads” pop-up box should appear indicating that the file is being downloaded. The file may take a little time to download. It should appear at the bottom left of your web browser once it has finished downloading.

## Removing Filters Before You Exit the Survey




### Remove Your Filter

1. When you are finished reviewing your data, you should remove your filter. Other supervisors/advisors will be reviewing their data through the same portal, so it is important to make sure they can create their own filters and to avoid having another person inadvertently edit your filter. If you need to go back into the data at a later date, your filter will be saved and you can apply it without recreating a new filter.




## Applying a Saved Filter

If you need to apply a filter that you had created previously, you can find it under “Saved Filters”

1. Click on the “Add Filter” drop down
2. Hover your mouse over “Saved Filters” until a sub menu appears.
3. Click on your saved filter.