Qualtrics Reports – 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

- Customize your report, download your own report, and ability to download specific graphics/tables from the report.

Surveys Currently Collected through Qualtrics as of FFY 2021 Include:

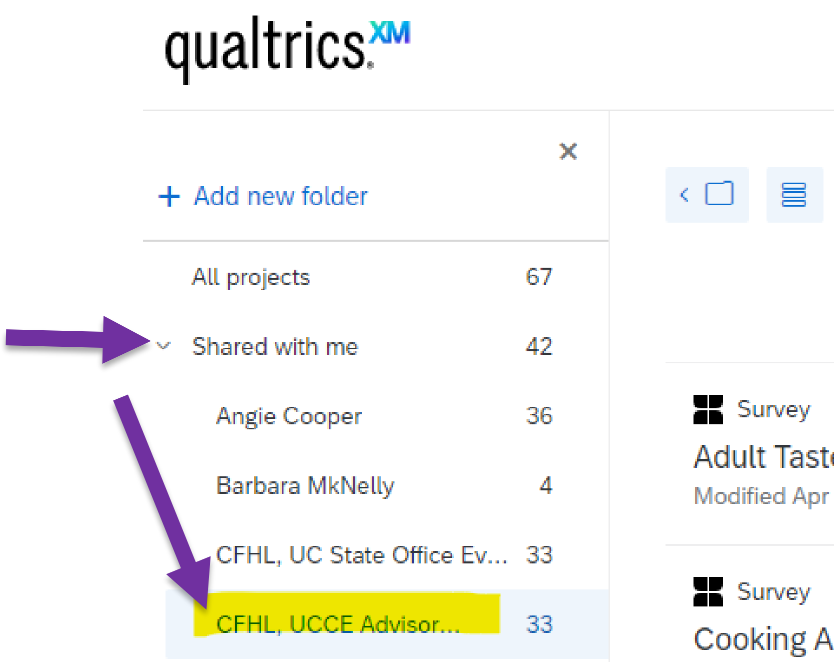
- CATCH Lesson Observation Tool (CATCH LOT)
- Cooking Academy
- Eating and Activity Tool for Students (EATS) for Middle and High School
- Food Behavior Checklist combined with APAS (FBC+PA)
- Healthy Happy Families (HHF)
- Intent to Change (ITC) surveys (**FFY2020 only, in PEARS for FFY2021**)
- Making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

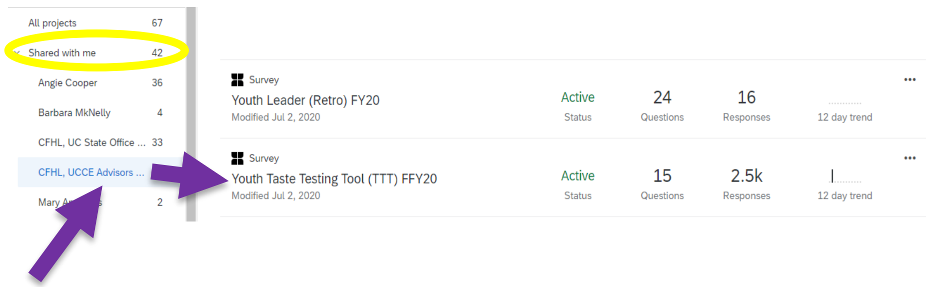


Viewing Your Data after Obtaining Viewing Rights

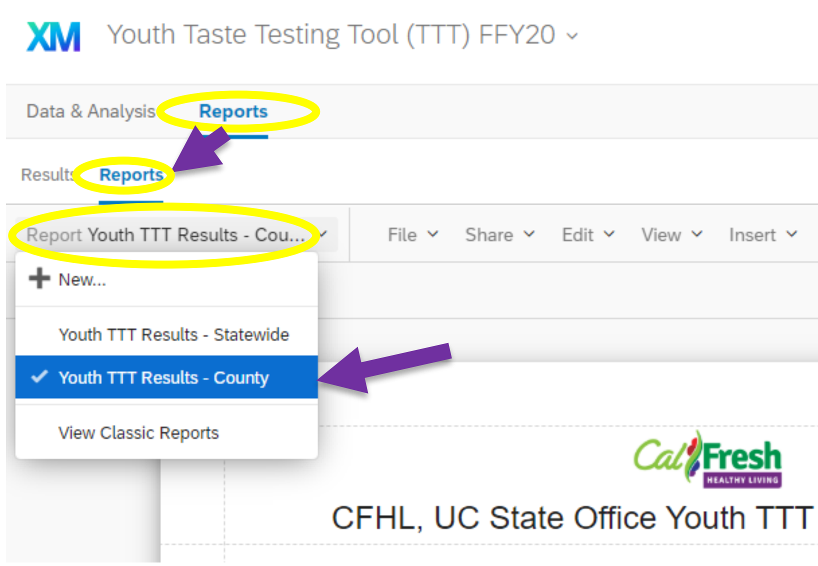
1. Sign in through the UC Davis Qualtrics link: https://ucdavis.qualtrics.com
2. Click on “Shared with me” in the upper left

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.*

Viewing Reports



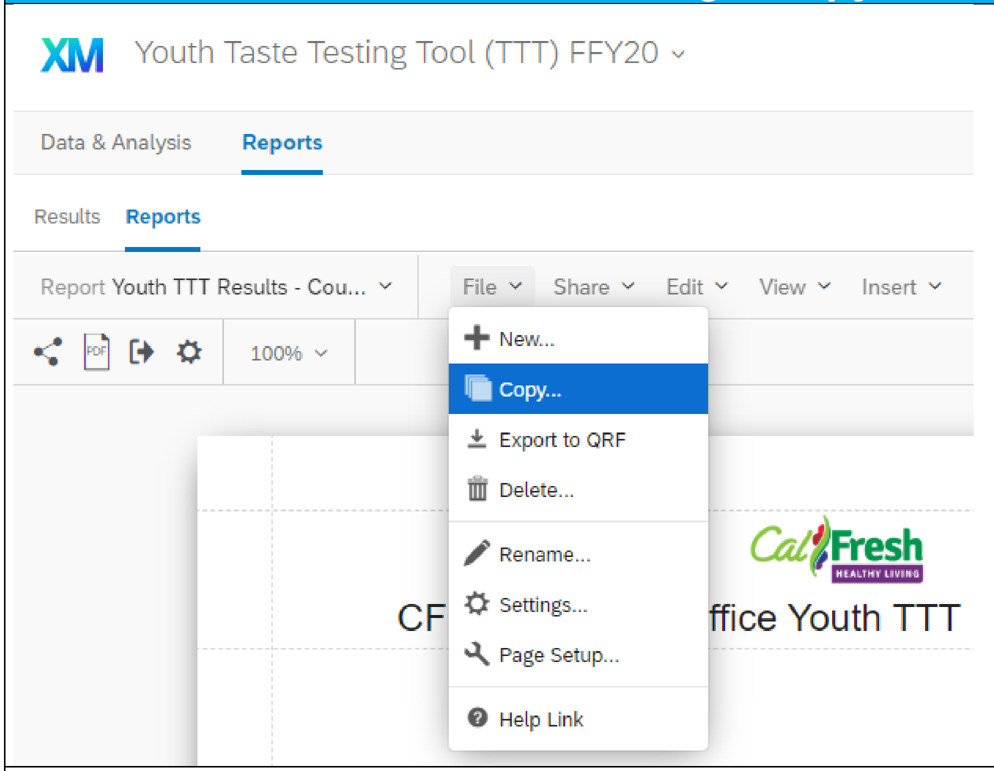
3. Under the "Shared with me" folder, click on the survey that you want to see



4. After clicking on a survey, you will be taken to that survey page. There should be two options at the very top: "Data & Analysis" and "Reports"
5. Click on "Reports." You will then have another two options: "Results"* and "Reports."
6. Choose "Reports." [for this example, we are using the Youth Taste Test Tool (TTT)]
7. Click on the "Report" drop down to select the "County" template report.

***NOTE**: *The "Reports" → "Results" are automatically generated by Qualtrics. The "Reports" → "Reports" have been developed by the CFHL, UC State Office Evaluation team specifically for county/cluster programs.*

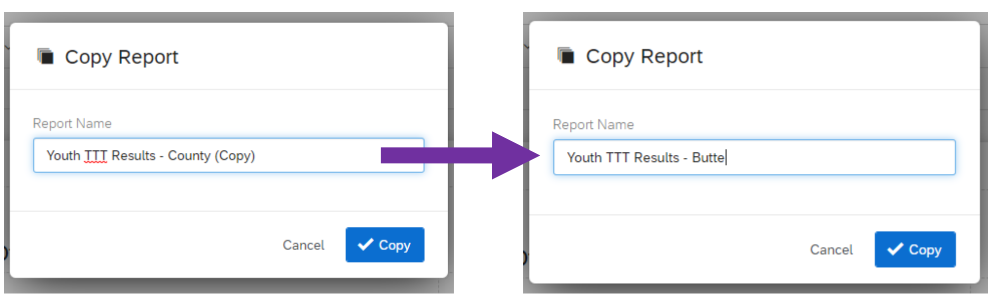
Making a Copy of the Report for Your County



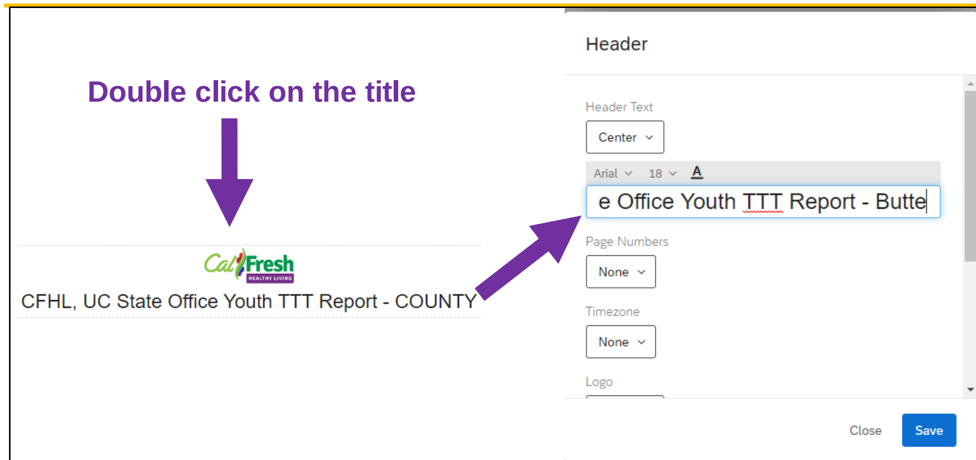
Making a Copy of the County Report Template

In order to customize the county report for your specific county, you must **FIRST** make a copy of the county template. This will ensure that the SO developed county report template remains unchanged.

1. Select the “File” drop down
2. Select “Copy”



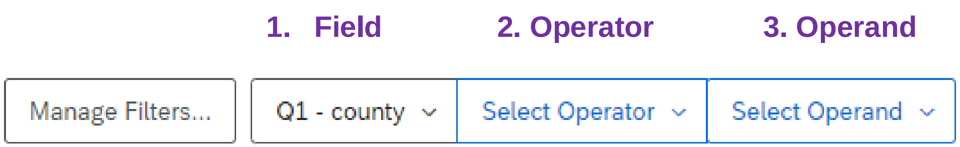
3. Change the name of the report for your county.



4. Change the title of the report by double clicking on the title.
5. An editing box will appear – change the title to your county's name.

NOTE: *The customized reports you create for your county will be copied over annually with the survey and available for reporting in future years as well.*

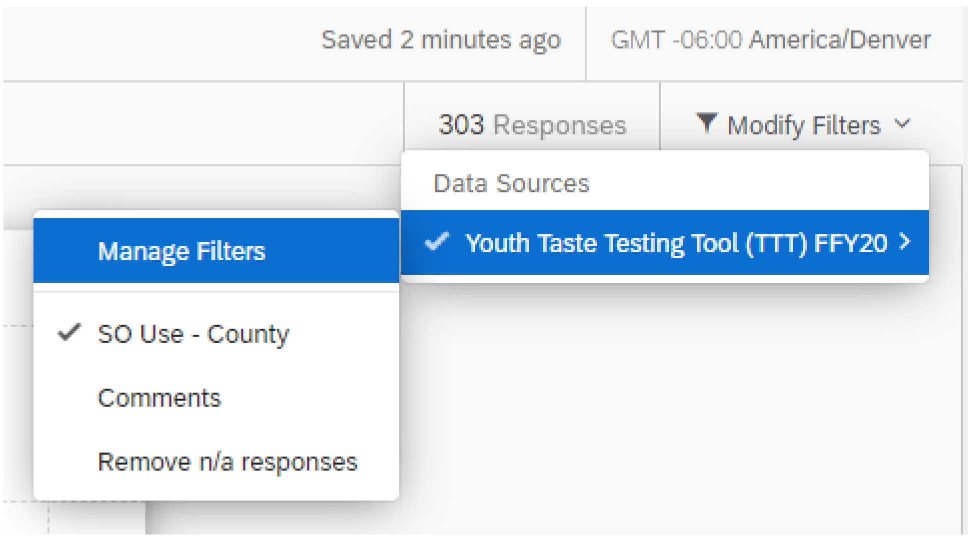
Using Filters to Customize Your County Report



Introduction to Filters

Filters allow you to define when a respondent's data should be included in the report. 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 question fields. There is one exception, which is included in this tip sheet.*
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.



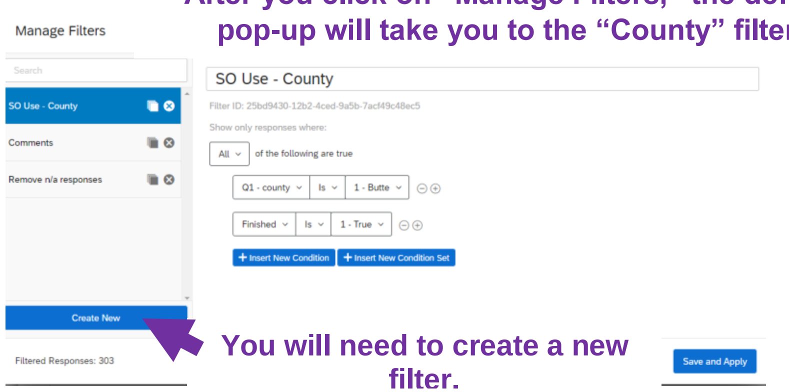
Creating a New Filter for Your County

After copying the county report template (*if you haven't done this, please go back to the* **Making a Copy of the Report for Your County** *section*), the first step in customizing your report is to create a filter to include only your county's data. *If you previously created a filter for the "data and analysis," section, your filter should already be created and saved in the drop down.*

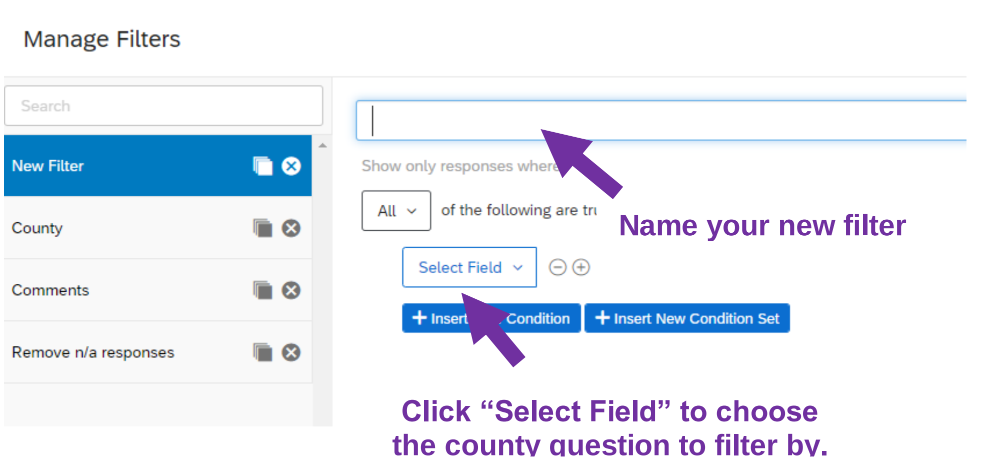
1. Click on the "Modify Filters" drop down.
2. Hover on the survey name (in this case, "Youth Taste Testing Tool (TTT) FFY20) until the sub menu appears.
3. Select "Manage Filters."*

***NOTE**: The "SO Use - County" filter will have a checkmark next to it, indicating that it is currently applied. This is because it was applied on the County template report that you used to copy and create this report. Clicking on a checked filter will turn the filter on or off. Once you create and apply your own county-specific filter, it should be automatically listed and checked in this drop down. Only one set of filters can be applied at a time to the whole report. However, you will see below that multiple "conditions" can be applied within a filter set.*

After you click on "Manage Filters," the default pop-up will take you to the "County" filter.

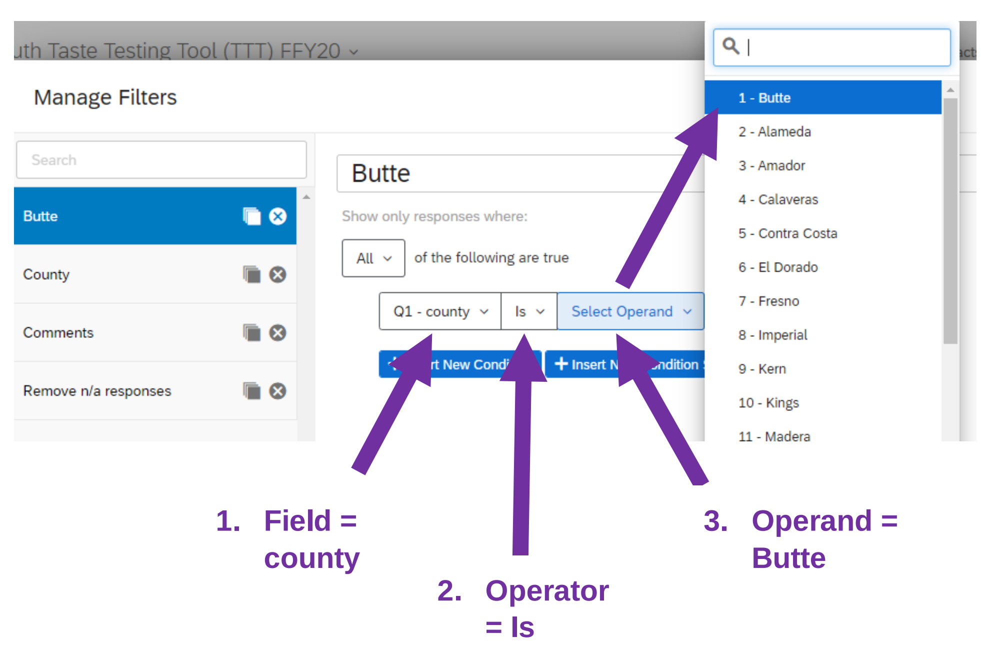


4. You will be taken to the "SO Use - County" filter because this filter copied over from the State Office County report template that you copied to make your own county's report. Next, you need to **create your own county specific filter** (e.g. Butte).



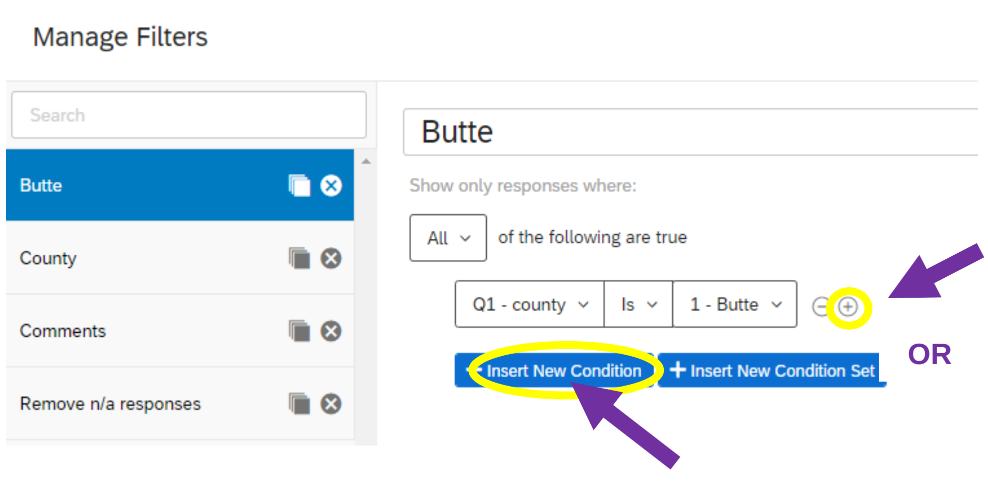
5. You will be taken to a new, blank filter. **Name your filter** before proceeding so that you can save it as your own.
6. Click on the “Select Field” drop down* to filter by county, which is a question that is included in every survey. Choose “county” from the drop down.

*__NOTE__: *A “Select Field” drop down for creating a new condition will be present when you create a new filter. When you want to add more than one filter condition, you will click on “Insert New Condition.” This will be demonstrated below.*



7. Choose “Is” in the second drop down (the operator).
8. Select your county, or multiple counties if you are a cluster program, from the third drop down (the operand). Be sure that only your county, or cluster counties, has a check mark next to it.

__NOTE__: *If you accidentally check another county, simply click on it to uncheck it.*

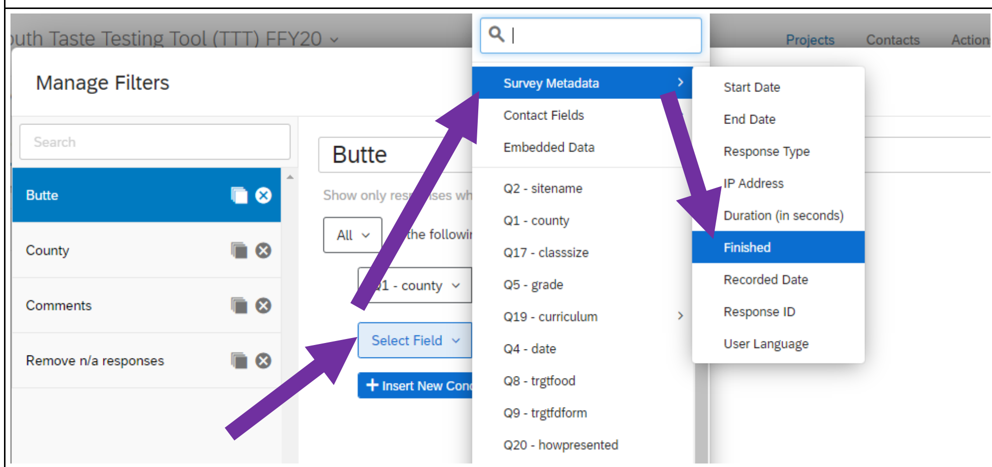


Add the “Finished” Filter Condition

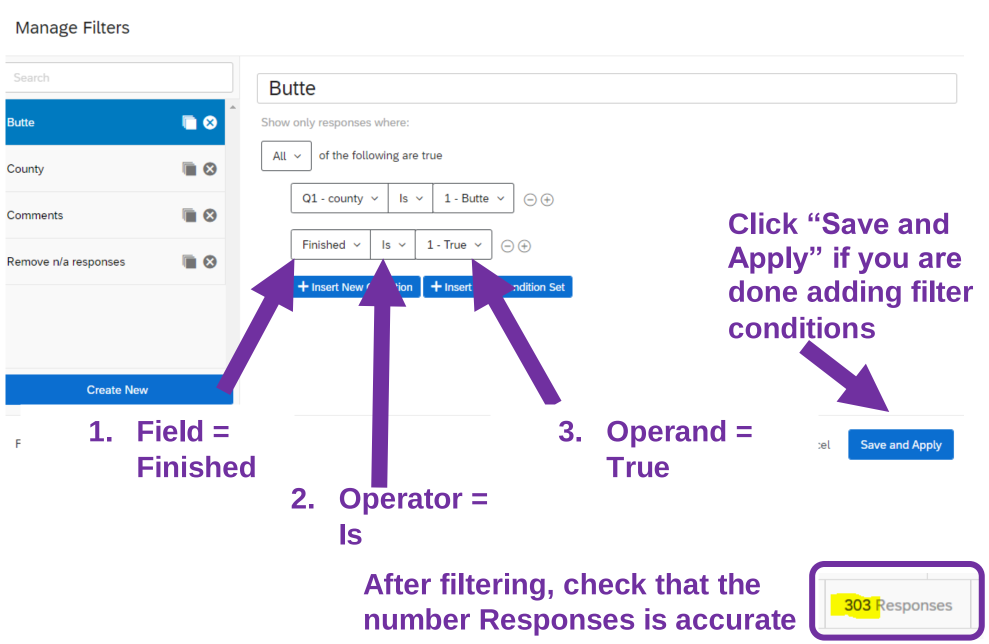
The SO includes a “Finished” filter on all of its reports, to exclude surveys that were started, but not finished*. It is highly recommended that any county-specific reports that you create include this filter.

1. Click on the “+” sign to the right of the filter condition OR click “insert new condition.”

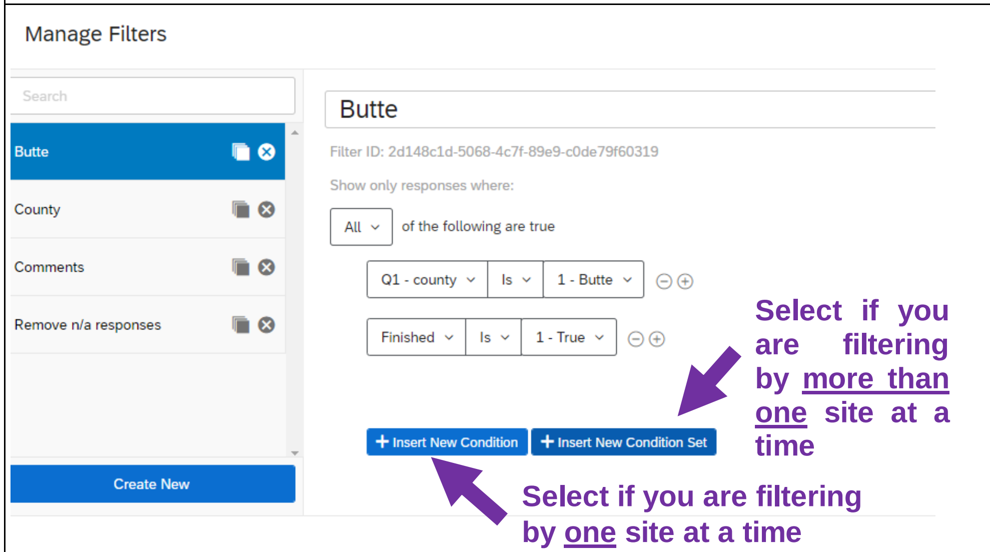
*__NOTE__: *The “finished” filter does not filter out surveys that may have had incomplete information. This filter only looks at whether the data enterer navigated to the end of the survey and clicked “submit.”*



2. Click on the “Select Field” drop down.
3. A pop up menu will appear. Hover your mouse over “Survey Metadata” until a submenu appears.
4. From the submenu, choose “Finished”



5. Choose “Is” in the second drop down (the operator).
6. Choose “True” from the third drop down (the operand).
7. If you are done adding filters for the moment, hit “Save and Apply.” Otherwise, continue following the instructions for filtering by site.
8. You should now see data only for the county or counties that you selected in your report. At the top of the page on the right side, the number of surveys (Responses) that apply to the county or counties that you selected will appear. Look at your data (Filtered Responses) to confirm that this number is accurate.



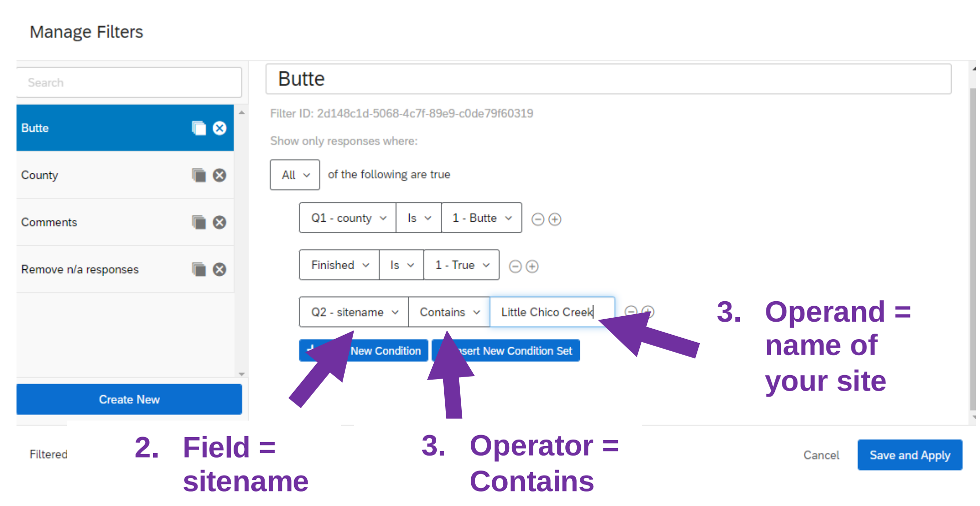
Adding a <u>Site</u> Filter Condition in “County” Filter

If you want to view your report for one specific site, you can add a new **condition** or a **condition set** to the “County” filter.

1. If you are only going to filter for **<u>one</u>** site at a time (for example a school): Select “Insert New **Condition**” → go to the **Filtering by *<u>One</u>* Site** section.

   <u>BUT</u>

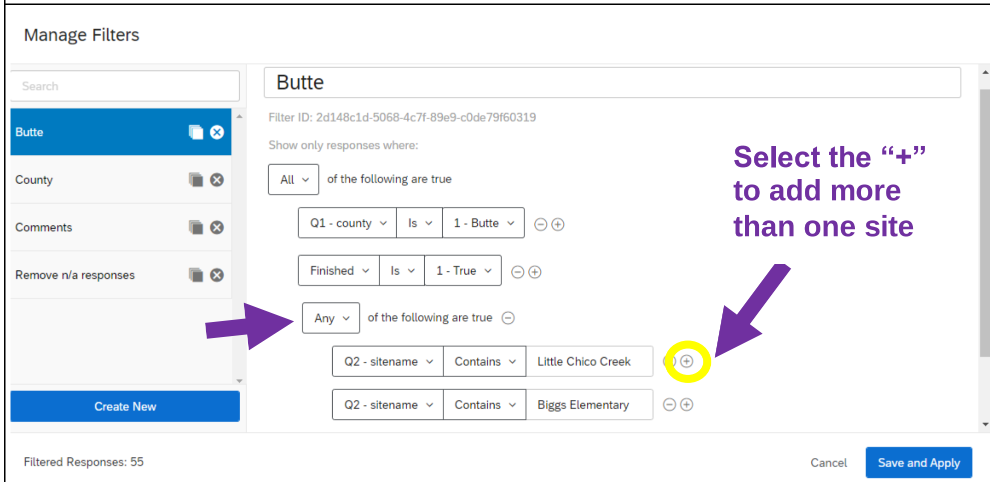
   If you are going to filter for **<u>more than one</u>** site at a time (for example a school district): Select “Insert New **Condition Set**” → go to the **Filtering by *<u>More Than One</u>* Site** section.



Filtering by <u>One</u> Site

2. After you've selected "Insert New **Condition**," choose for the:
   a. First drop down = "sitename"
   b. Second drop down = "contains"*
   c. Third drop down = name of the site
3. Click "Save and Apply."
4. You should now see data only for the site that you selected in your report. At the top of the page on the right side, the number of surveys (Responses) that apply to the site that you selected will appear.

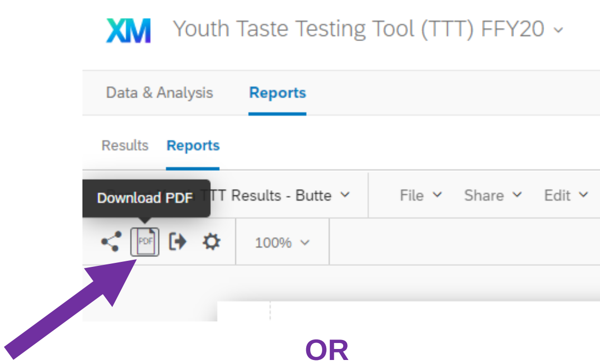
*<u>**NOTE**</u>: *For Text Entry questions, the operators can be "Is," "Is not," "Contains," or "Does not contain." However, "contains" will probably be the safest option to choose because site names may not have been entered exactly the same.*



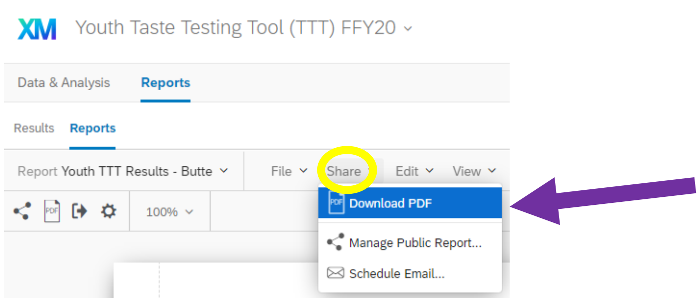
Filtering by <u>More Than One</u> Site

1. After you've selected "Insert New **Condition Set**," make sure "Any" of the following are true is selected.
2. Then, choose for the:
   a. First drop down = "sitename"
   b. Second drop down = "contains"*
   c. Third drop down = name of the site
3. 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.
4. Click "Save and Apply."
5. You should now see data only for the sites that you selected in your report. At the top of the page on the right side, the number of surveys (Responses) that apply to the sites that you selected will appear.

Downloading Your Report



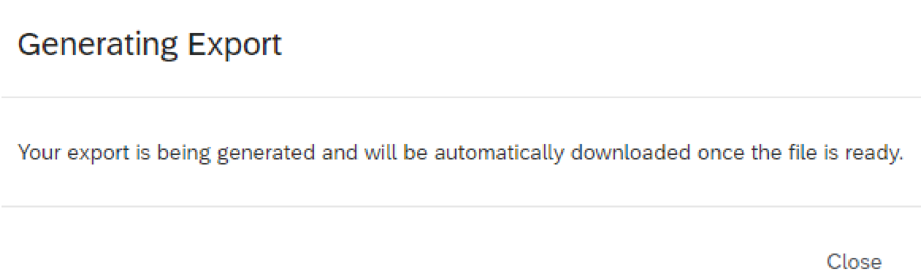
OR



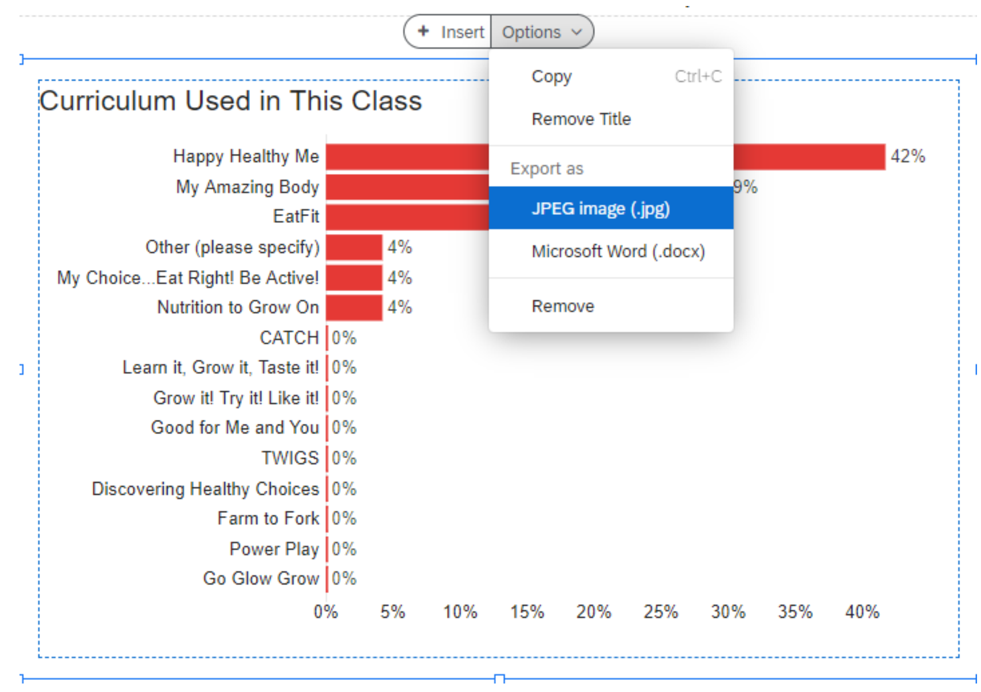
Downloading the Full Report

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

1. To download your full report, click on the “PDF” icon OR click on the “Share” drop down and choose “Download PDF”



2. A “Generating Export” pop-up box should appear indicating that the PDF 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.



Downloading a Single Graphic or Table

You may want to download just one single graphic or table within the report – perhaps for a presentation. Qualtrics allows you to download single graphics or tables within the reports as either a JPEG (an image that you cannot edit; best for maintaining integrity of the graphic/table) or a Microsoft Word docx (editable; best if you want to make small edits or changes to the graphic/table).

1. Click on the “Options” drop down above the graphic/table that you would like to download.
2. Choose JPEG or Microsoft Word.
3. A “Generating Export” pop-up box should appear (as described above) indicating that the JPEG or docx 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.