

## 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](mailto:bmknelly@ucdavis.edu) or Angie [akeihner@ucdavis.edu](mailto: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

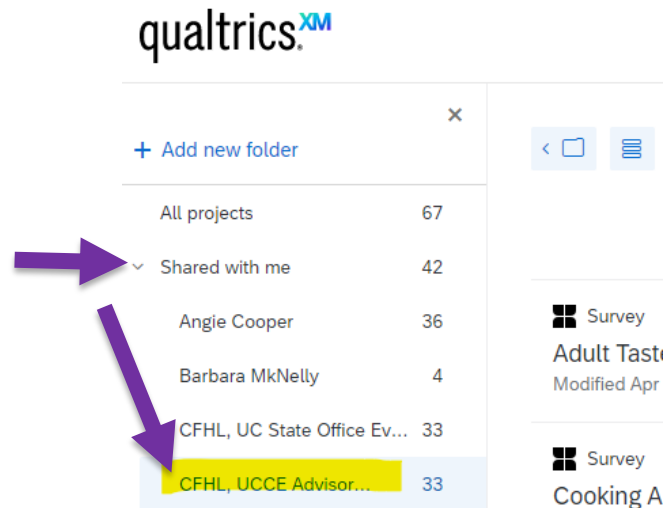
- Taste Test Tools (TTTs) – youth, adult, large group, pre-K
- Teacher Observation Tool (TOT) and Physical Activity TOT (PA TOT)
- Teens as Teachers
- Youth-led Participatory Action Research (YPAR) – pre/post, retrospective, and assessment

### 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](mailto: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.*

## Qualtrics Data Review Tip Sheet

All projects 67  
 Shared with me 42  
 Angie Cooper 36  
 Barbara McNelly 4  
 CFHL, UC State Office ... 33  
 CFHL, UCCE Advisors ...  
 Mary A ... 2

Survey	Status	Questions	Responses	12 day trend
Youth Leader (Retro) FY20 Modified Jul 2, 2020	Active	24	16	12 day trend
Youth Taste Testing Tool (TTT) FFY20 Modified Jul 2, 2020	Active	15	2.5k	12 day trend

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

XM Youth Taste Testing Tool (TTT) FFY20

Data & Analysis Reports

Data Text Crosstabs

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.”

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Data & Analysis Reports

Data Text Crosstabs

Add Filter

Recorded Date	Q1 - county	Q2 - sitename
Aug 1, 2020 4:44 PM	Santa Clara	Mayne Extended Day
Jul 20, 2020 3:54 PM	El Dorado	Lake Tahoe Unified School District

Search: Q |

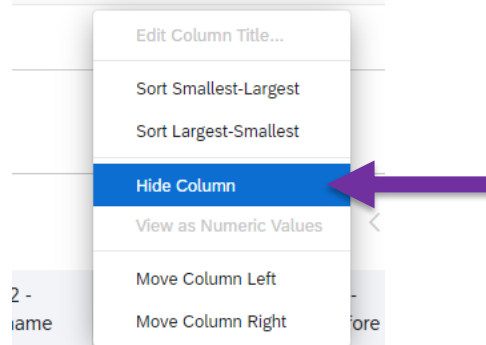
- Survey Metadata
- Contact Fields
- Embedded Data
- Q2 - sitename
- Q1 - county
- Q17 - classsize
- Q5 - grade

### 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.

## Qualtrics Data Review Tip Sheet



### 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

1. Click on any cell within the row of the survey you want to see

Recorded Date	Response Type	Q1 - county	Q2 - sitename	Q17 - classsize	Q22 - triedbefore	TriedBefore_OffTotal
Aug 1, 2020 4:44 PM	IP Address	Santa Clara	Mayne Extended Day	10		0
Jul 20, 2020 3:54 PM	IP Address	El Dorado	Lake Tahoe Unified School District	50	50	100
Jul 9, 2020 7:18 PM	IP Address	Riverside	Nicolet Middle School	14	3	21,429

2. A popup will appear with the survey

99.52.200.31 Recorded Aug 1, 2020 4:44 PM Duration 00:02:15

Q16  
CalFresh Healthy Living, UC Youth Taste Testing Tool (TTT) FFY20

Use this form to report your youth taste testing activities. If you conducted taste tests with multiple groups at one school/site, each group should be entered as a separate survey.

The maximum group total for the Youth TTT is 50 participants. Please use the **Large Group Taste Test Tool (LG-TTT)** to report on student taste tests conducted in a large group setting—typically in the cafeteria but also possibly afterschool or on the playground. You can find the LG-TTT and data entry portal on the [CalFresh Healthy Living, University of California website](#).

3. Scroll through the survey

4. Use the arrow to review the next survey

### 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

#### 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.

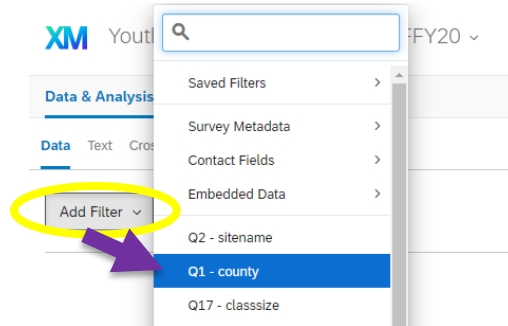
1. The first drop down menu is the field. *You will probably only use question fields.*
2. The second drop down menu is the operator. The operator determines how the field relates to the final segment (the operand).
3. The third, and final, drop down menu is the operand. An operand is the value you want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

1. Field                      2. Operator                      3. Operand

#### Filtering for Your County

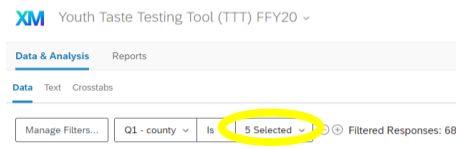
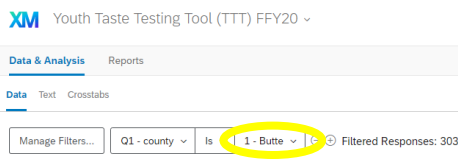
You will be able to see the data for all UCCE programs that have submitted surveys. Therefore, the first step you should take when reviewing your data is to filter for your county.\*

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.



Filter for one county

Filter for a cluster



**\*NOTE:** 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

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Data & Analysis Reports

Data Text Crosstabs

Manage Filters...

Q1 - county ▾

Is ▾

1 - Butte ▾



Filtered Responses: 303

Manage Filters

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.

## Qualtrics Data Review Tip Sheet

Manage Filters

Search

New Filter

County

Comments

Remove n/a responses

Show only responses where:

All of the following are true

Q1 - county Is 1 - Butte

Select Field

Insert New Condition

Insert New Condition Set

Cancel Save and Apply

**Name your filter**

**Use this drop down to build your filter condition for one site**

**Select if you are filtering by more than one site at a time**

- Name your filter
- 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.

Manage Filters

Search

Butte

SO Use - County

Comments

Remove n/a responses

Show only responses where:

All of the following are true

Q1 - county Is 1 - Butte

Q2 - sitename Contains Little Chico Creek

Insert New Condition

Insert New Condition Set

Cancel Save and Apply

Filtered Responses: 31

**1. Field = sitename**

**1. Operator = Contains**

**5. Operand = name**

### **Filtering by One Site**

- Use the provided drop down to choose for the:
  - First drop down = “sitename”
  - Second drop down = “contains”\*
  - Third drop down = name of the site
- Click “Save and Apply.”
- 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.

## Qualtrics Data Review Tip Sheet

Manage Filters

Search

Butte

SO Use - County

Comments

Remove n/a responses

Create New

Filtered Responses: 55

Cancel Save and Apply

Butte

Show only responses where:

All of the following are true

Q1 - county Is 1 - Butte

Any of the following are true

Q2 - sitename Contains Little Chico Creek

Q2 - sitename Contains Biggs

+ Insert New Condition + Insert New Condition Set

+ Insert New Condition + Insert New Condition Set

Select the “+” to add more than one site

Make sure that “Any” is

### Filtering by More Than One 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

### 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.

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Data & Analysis Reports

Data Text Crosstabs

Add Filter ▾

- Edit Column Title...
- Sort A-Z**
- Sort Z-A
- Hide Column
- View as Numeric Values
- Move Column Left
- Move Column Right

Sort “Sort A-Z” and “Sort Z-A” option for site name

Recorded Date	Q1 - county	Q2 - sitename	Q2 - size	Q22 - triedbefore
Aug 1, 2020 4:44 PM	Santa Clara	Mayne Extended Day	10	
Jul 20, 2020 3:54 PM	El Dorado	Lake Tahoe Unified School District	50	50

XM Youth Taste Testing Tool (TTT) FFY20 ▾

Data & Analysis Reports

Data Text Crosstabs

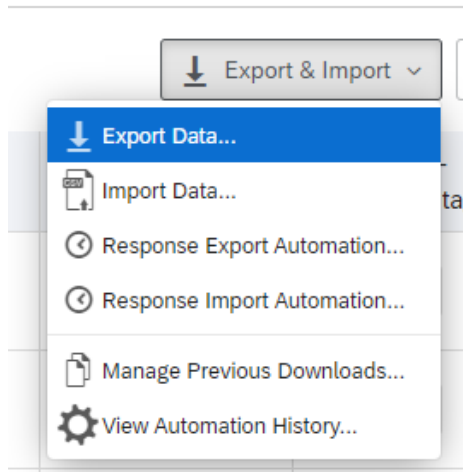
Add Filter ▾

- Edit Column Title...
- Sort Smallest-Largest**
- Sort Largest-Smallest
- Hide Column
- View as Numeric Values
- Move Column Left
- Move Column Right

Sort “Sort Smallest-Largest” and “Sort Largest-Smallest” option for class size

Recorded Date	Q1 - county	Q2 - sitename	Q2 - size	Q22 - triedbefore
Aug 1, 2020 4:44 PM	Santa Clara	Mayne Extended Day	10	
Jul 20, 2020 3:54 PM	El Dorado	Lake Tahoe Unified School District	50	50
Jul 9, 2020 7:16 PM	Riverside	Nicolet Middle School	14	3

## 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”

### Download Data Table

[Use Legacy Exporter](#)

CSV TSV **Excel** XML SPSS Google Drive User Submitted Files



Excel

Export your data as an XLSX file - an Excel-compatible format. If you have a very large number of responses, use TSV instead.

[Learn More](#)

Download all fields

Use numeric values

Use choice text

[More Options](#)

Close

[Download](#)

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.”

## Qualtrics Data Review Tip Sheet

### Manage Downloads

Status	Type	Percent Complete	Last Updated	Delete Job
Download	Excel (Table)	100%	3 minutes ago	

Close

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

**XM** Youth Taste Testing Tool (TTT) FFY20 ▾

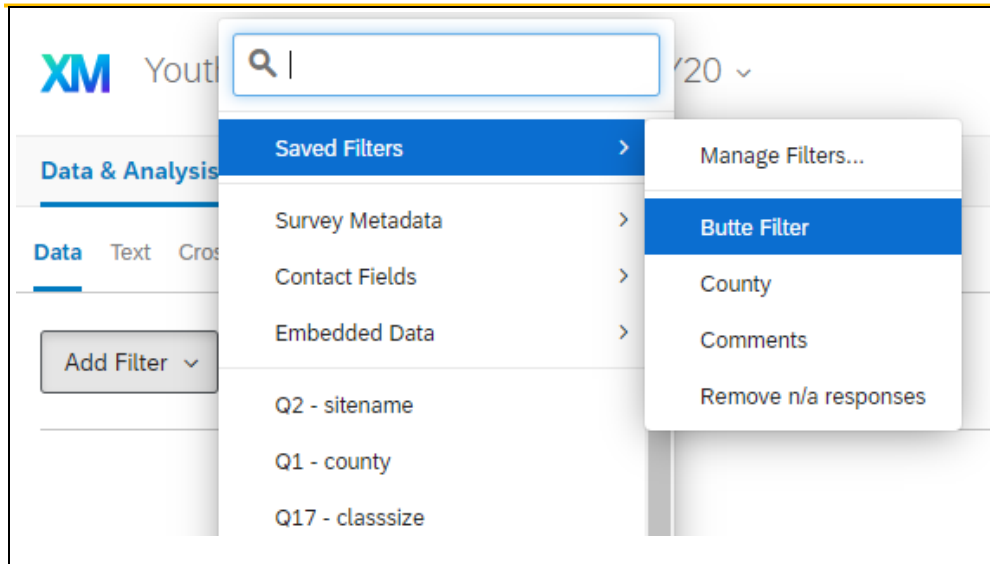
**Data & Analysis** Reports

**Data** Text Crosstabs

Manage Filters... Butte Filter ⊖ Filtered Responses: 46

### 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.