

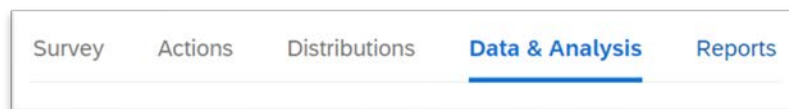
## SRU Qualtrics Guides:

### 4. Exporting and Analyzing Survey Data

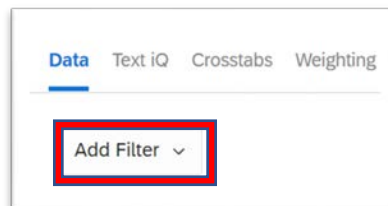
sru.qualtrics.com

Last Updated: 8/20/21

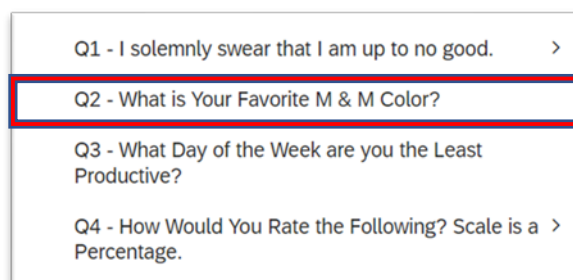
1. **Data and Analysis Tab** - Once you log in to Qualtrics and click on your survey, navigate to the **Data and Analysis Tab** at the top left-hand side of the screen.



2. **Filters** – Applying a filter and managing a filter - Click on the **Add Filter** button at the top left-hand side of the screen to access the drop-down menu.

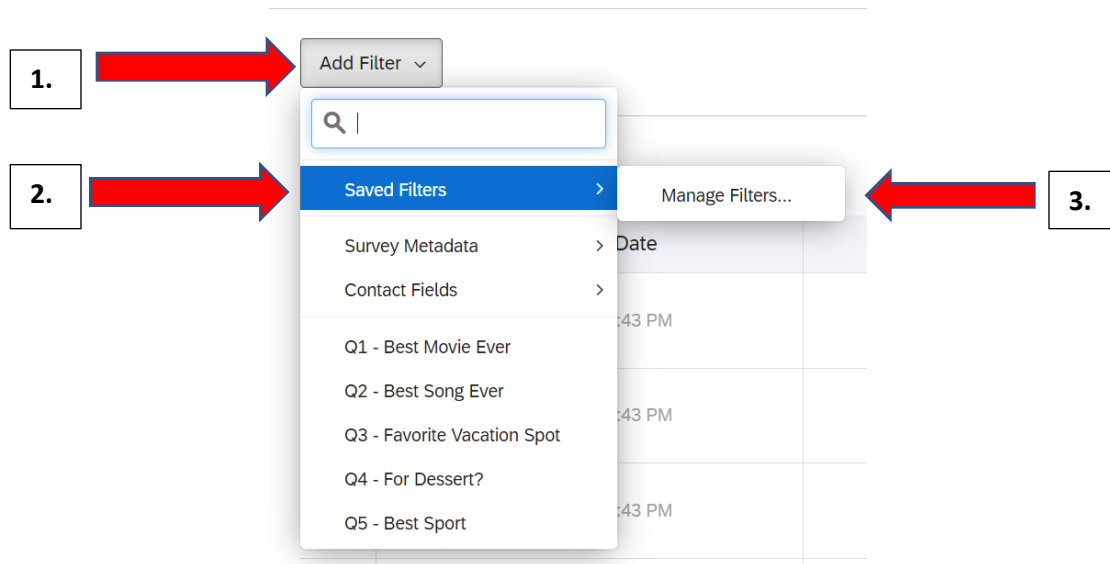


From the drop-down menu, click on the question you want to filter by. For this example, Q2 is used – What is Your Favorite M & M Color?



This will open multiple drop-down menus at the top of the screen.

3. **Manage Filters** – Open **Manage Filters** by clicking on the **Add Filter** drop-down, **Saved Filters**, and **Manage Filters**.



You can filter the responses you want to view from the **Manage Filters** tab OR you can click on the **Select Operator** tab and **Select Operand** tab at the top of the screen to access a drop-down menu and select your criteria that way.

Using the M&M example, in Q2 “is” is the Select Operator and “1-Blue” is the Select Operand.

- Note: You can select more than one Operand. If you click on the **Select Operand** drop-down again, you can also select “red” to filter by in addition to “blue”.

The blue **Insert New Condition** button will allow you to add additional questions to filter by. The blue **Insert New Condition Set** will add a new set at the bottom of the set you’re currently in.

You can also name your filter criteria by clicking in the text box where it says **New Filter**.

Make sure to click **Save and Apply** when finished.

Show only responses where:

All ▾ of the following are true


Q2 - What is Your Favorite M & M Color? ▾ Is ▾ 1 - Blue ▾ ⊖ ⊕

[+ Insert New Condition](#) [+ Insert New Condition Set](#)

[Save and Apply](#)

To remove unwanted filter criteria from either **Manage Filters** or the main **Data and Analysis** page, click on the **minus** “-” “mini button.

[Manage Filters...](#) Best Movie Ever! ⊖ Filtered Responses: 6



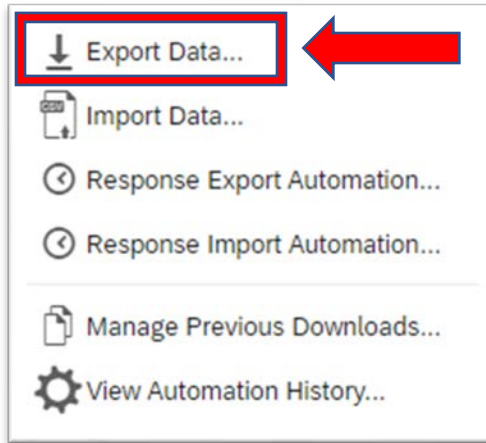
Here’s how the example appears on the main page with the “favorite M&M color blue” applied. With the filters applied, it will only pull surveys where the question, “What is your favorite M&M color?” were answered “blue”.

With Selected ▾					Page 1 of 1 ▾		Export & Import ▾	Edit	Tools ▾
<input type="checkbox"/>	Recorded Date	Q2 - What is Your Favorite M & M Color?	Q3 - What Day of the Week are you the Least Productive?	Actions					
<input type="checkbox"/>	Apr 2, 2021 1:06 PM	Blue	Monday	<input type="checkbox"/>					

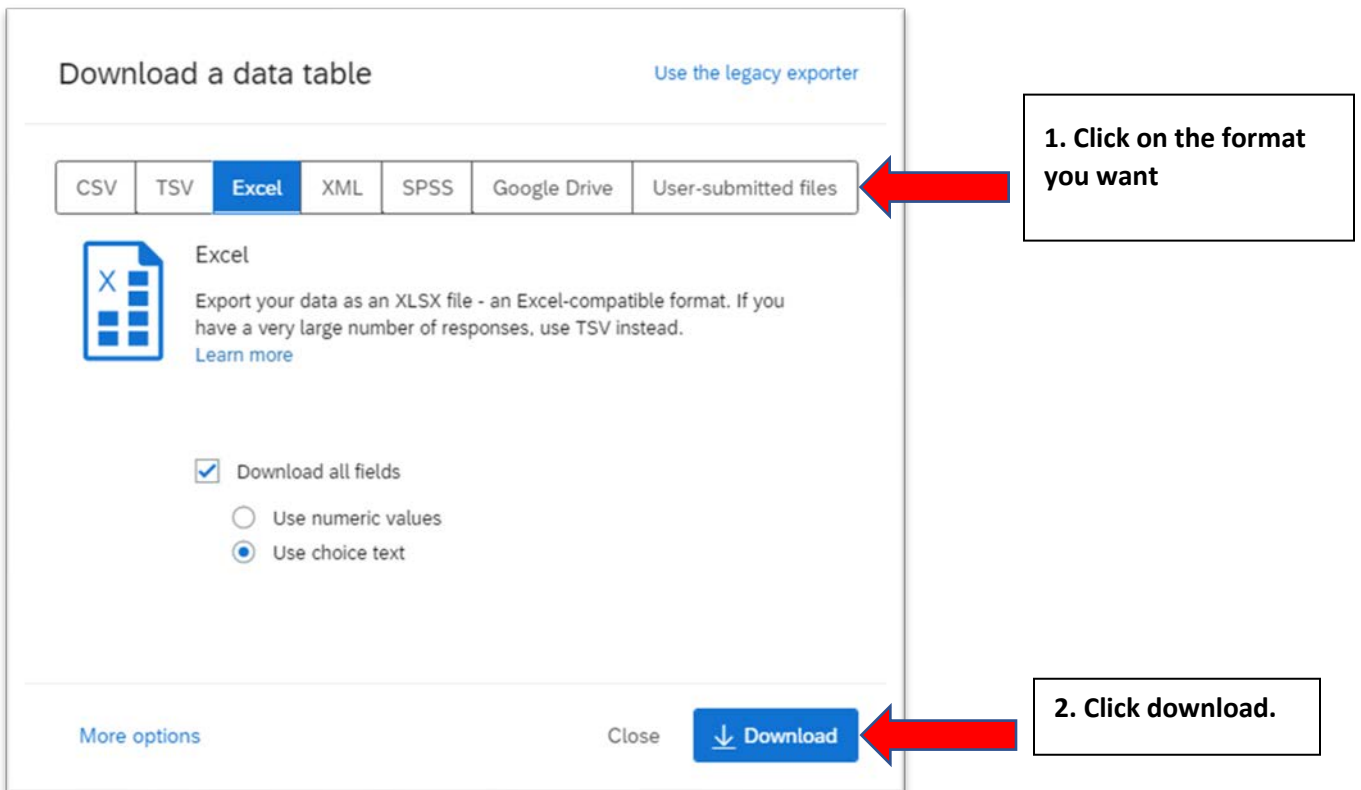
- Export/Import** - On the right-hand side of the **Data & Analysis** page, click on the **Export & Import** button.

[↓ Export & Import ▾](#) [Edit](#) [Tools ▾](#)

From the drop-down list that appears, click on the first option, **Export Data**.



A **Download a Data Table** box will pop-up. From here you can pick the format you want your data to be in. Click on the format you want at the top of the box (this will highlight the box blue when selected). When finished, click on the **download** button at the bottom right of the box. In this example Excel is used.

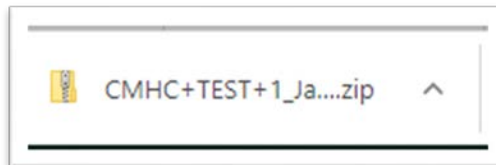


A table will pop-up showing the progress of the download. Once **Percent Complete** reaches 100% the download will appear at the bottom of the screen.

Status	Type	Percent Complete	Last Updated	Delete Job
Download	Excel (Table)	100%	a few seconds ago	

Close

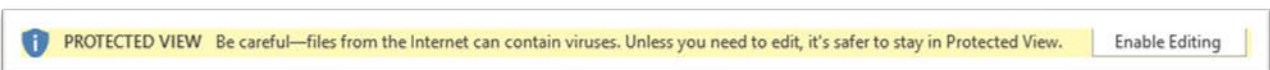
Double click on the download (folder icon).



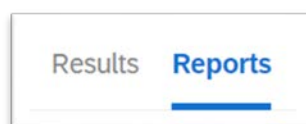
Double click on the file (the Excel icon in this example).



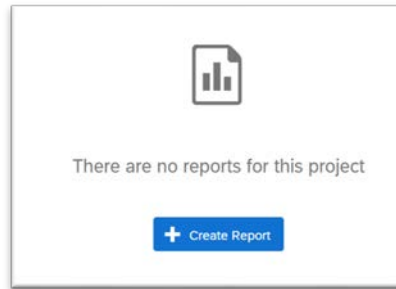
Once the file is open, be sure to click on **Enable Editing** in the yellow bar at the top of the screen. You'll now be able to edit and save the data as needed.



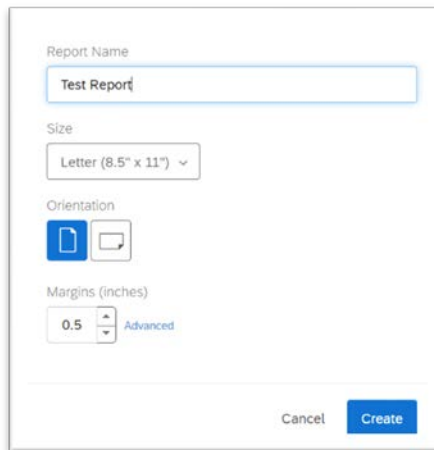
5. **Reports Tab** – Automatically defaults to results; toggle to **Reports**.



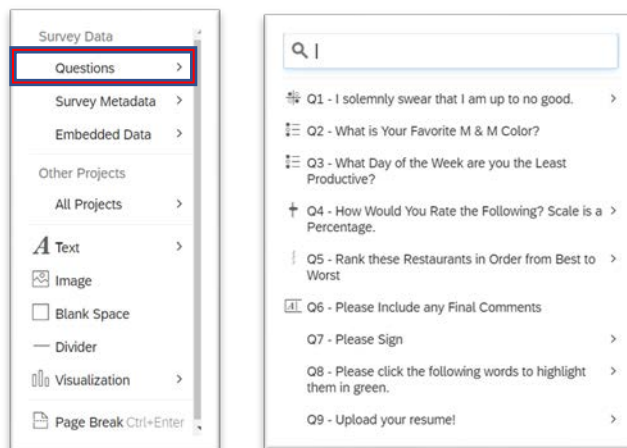
Click on the blue **Create Report** button.



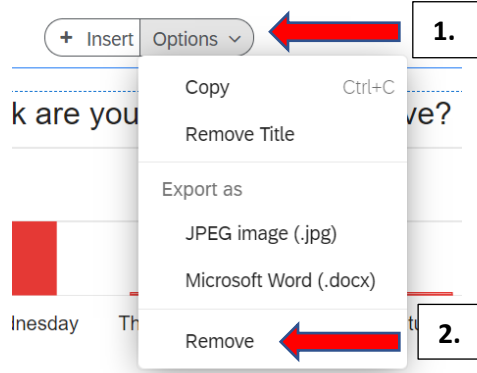
**New Report** - From here you can enter a report name, pick the size of printed report, orientation, and margins. When finished click on the blue **Create** button.

A white form with a thin grey border. It contains several sections: "Report Name" with a text input field containing "Test Report"; "Size" with a dropdown menu showing "Letter (8.5\" x 11\")"; "Orientation" with two icons, a blue one with a vertical document and a white one with a horizontal document; "Margins (inches)" with a spinner box set to "0.5" and the word "Advanced" next to it. At the bottom right are two buttons: "Cancel" and "Create".

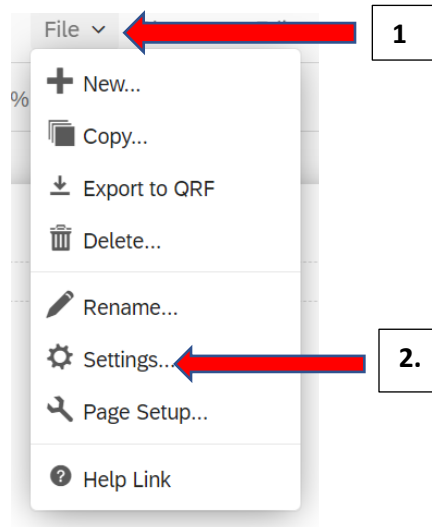
A blank survey will load, click on the white **+Insert** button and a pop-up menu will appear. Hover or click on **Questions** and click on the question you want to add to your blank survey.



- Note: To add additional questions click on the white **+Insert** button. To remove a question, click on the question, **Options**, and then **Remove**.

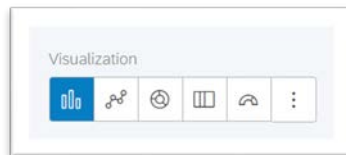


6. **Customizing the look of your survey - Settings** – Click on **File** and then **Settings** from the drop-down menu.

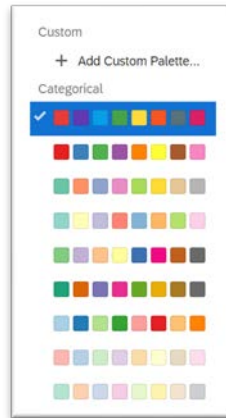


**Visualization** - The **Visualization** bar, under **Settings** on the right, will allow you to change the type of graph between bar (default), line, pie, breakdown bar, or gauge.

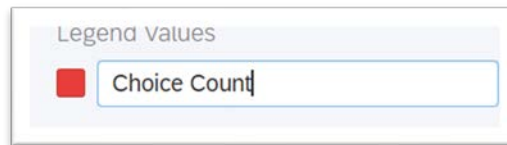
Clicking on the three ellipsis dots gives you the additional options of a data, statistics, or results table.



**Color Palette** - By clicking the drop-down arrow you have the option of selecting a different color scheme for your chart.



**Legend Values** - You can click in the text box and type in, for example, "responses", "collected data", etc.



**Legend Position** - Access the drop-down menu by clicking the arrow. You can move the legend to the top, bottom, or right of the chart. You can also opt out by selecting **None**.





**Axis Values** - Click in the boxes to select or de-select the data that you would like to appear on the axis of the chart/graph. In this example, days of the week are shown.

Axis Values

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

**Styles Tab** – Located on the right-hand side of the screen, will change things like the font size and color.

**Settings** | **Styles**

Response Count Reset to Default

Helvetica   **Clicking on the small arrow drop-down will allow you to change the font (defaults to Helvetica font).**

**Clicking on the black box will allow you to customize the font color; clicking on the "B" icon makes the text bold.**

**Click on the small arrow drop-down to change the font size.**

Chart Text

Helvetica   **Chart text has similar functions as response counts, except it will alter**

Margin

Default (Normal) **Click on the small arrow drop-down to change the margin sizes.**

To save the report, click on the **pdf icon** in the upper left of the screen.



A pop-up message will appear as the report is downloading. The pdf will appear at the bottom of the screen, which can be opened and saved.

### Additional Resources:

<https://www.sru.edu/offices/planning-resource-management-and-assessment/services> - PRMA page with additional Qualtrics guides – Under the **Survey Requests** accordion/**Qualtrics Self-Help**

<https://www.qualtrics.com/support/survey-platform/getting-started/survey-platform-overview/> - Qualtrics Training Manual – Main

<https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data/download-data/export-data-overview/> - Qualtrics Training Manual – Exporting Response Data

<https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data/download-data/export-formats/> - Qualtrics Training Manual – Data Export Formats

<https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data/download-data/understanding-your-dataset/> - Qualtrics Training Manual – Understanding Your Data Set

<https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/data/download-data/export-options/> - Qualtrics Training Manual – Data Export Options

<https://www.qualtrics.com/support/survey-platform/reports-module/reports-section/paginated-reports-overview/?parent=p00269> – Qualtrics Training Manual – Advanced Reports Basic Overview