



University of Kentucky
College of Agriculture,
Food and Environment
Cooperative Extension Service

Qualtrics: Reporting

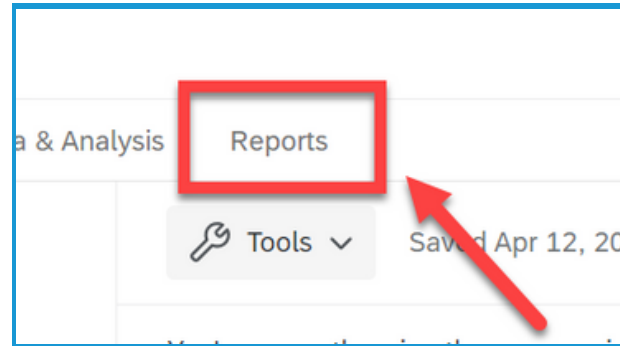
**Any questions or training request:
chad.jennings@uky.edu**

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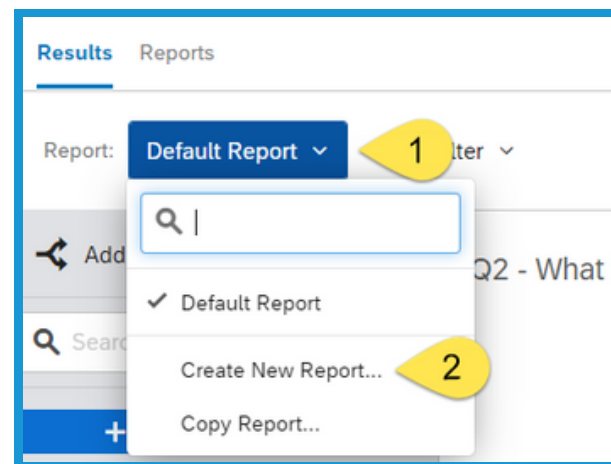
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Section 1a: Creating a Report - Getting Started

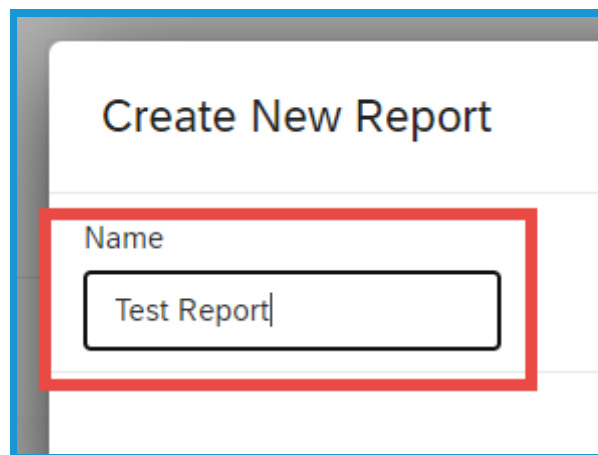
1. Click **Reports** in the upper left of the Survey Builder page.



2. In the upper left corner click the report dropdown menu **(1)**. Then select **Create New Report (2)**.

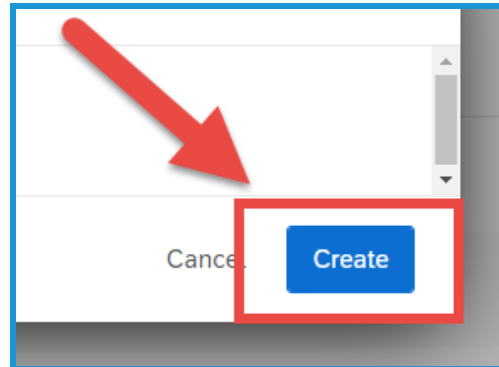


3. Give your report a name in the name field.



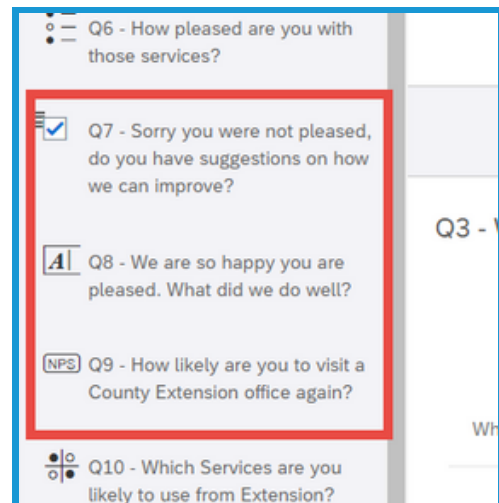
Section 1a: Creating a Report - Getting Started

4. Click **Create** in the lower right of the new window.

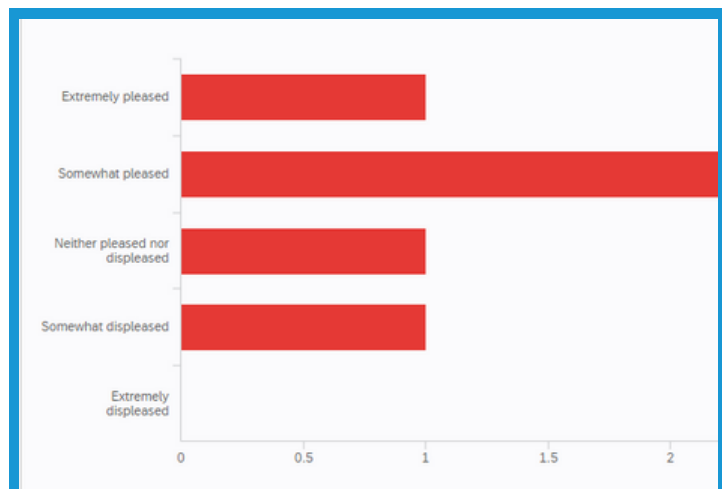


Section 1b: Creating a Report - Creating Graphs

1. Click the **question** on the left hand side that you are wanting to review. **Do not click the checkbox. That will remove the question from the report.**

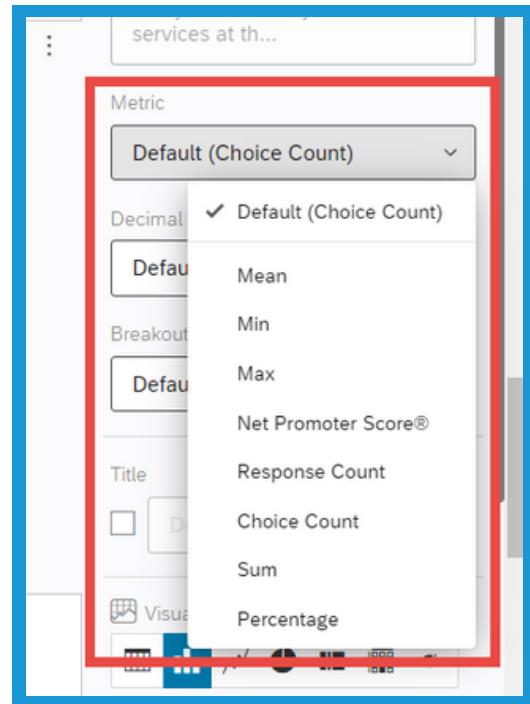


2. Click the default graph that Qualtrics populates. A new menu will appear on the right side.

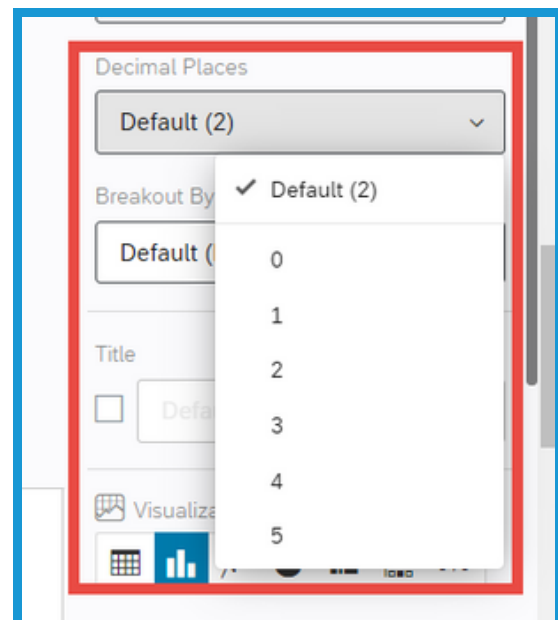


Section 1b: Creating a Report - Creating Graphs

3. Click the **Metric dropdown menu** on the right side of the screen to change the data format. Please note that these will change based on the type of question.

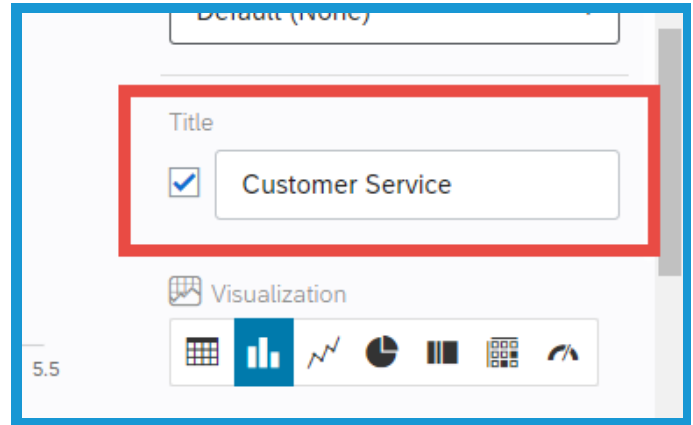


4. Click the **decimal dropdown menu** to add additional decimal places or remove them entirely.

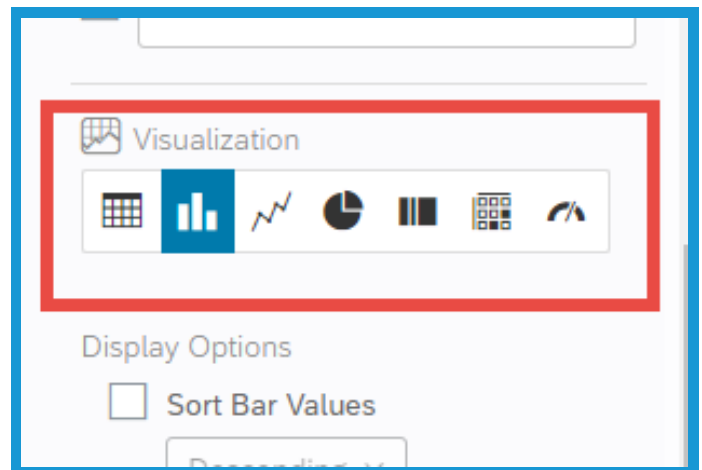


Section 1b: Creating a Report - Creating Graphs

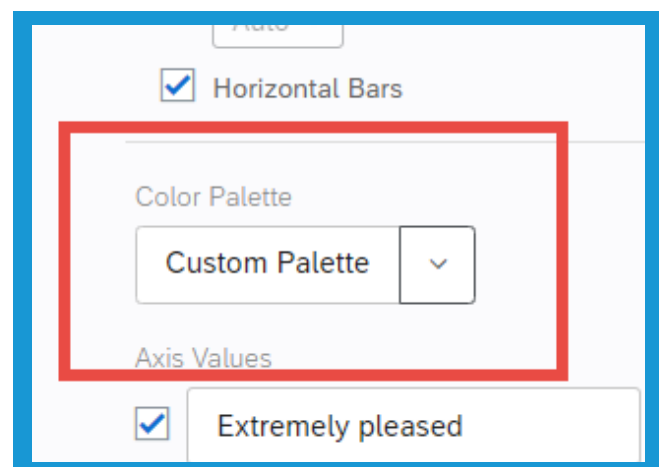
5. Check the **Title box** to type in a new title for the graph if you want to replace the question text.



6. In the **visualization menu**, you can choose a different format to display the information. Please note that these options will change based on the type of question.

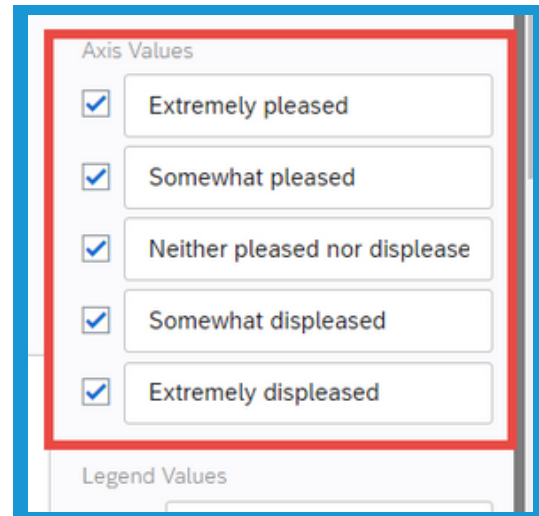


7. Select the **Color Palette** to change the colors of the graph that you are building.

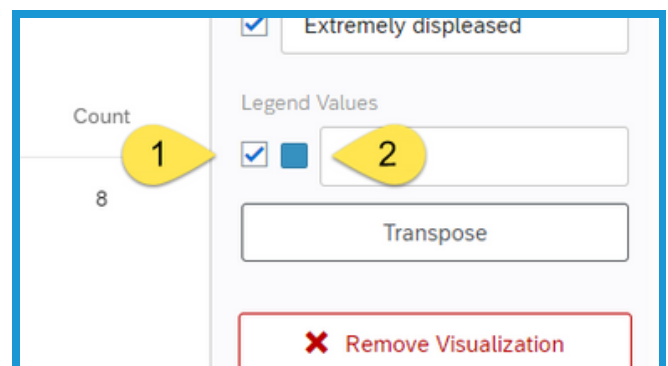


Section 1b: Creating a Report - Creating Graphs

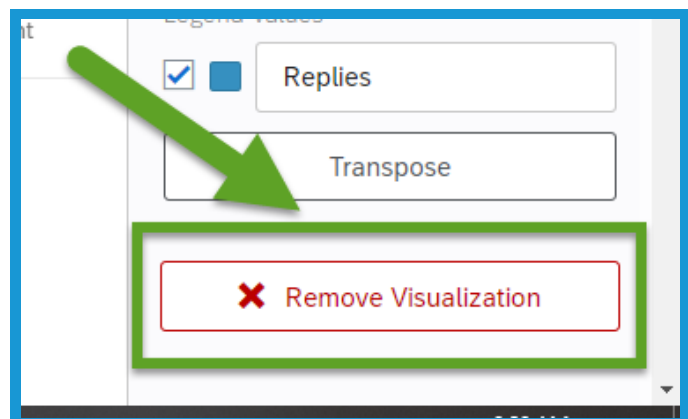
8. In the **Axis Values** section, you can uncheck specific values if you want them removed from the graph.



9. Under **Legend Values** uncheck the box to hide the legend (1). You can also change the legend color by clicking the color box.

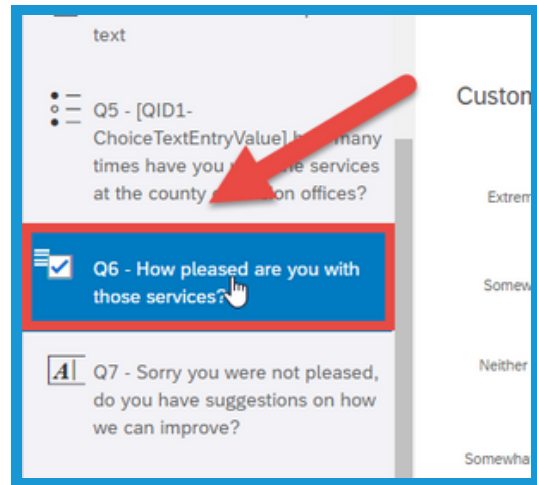


10. Click the **Remove Visualization** button to discard the graph.



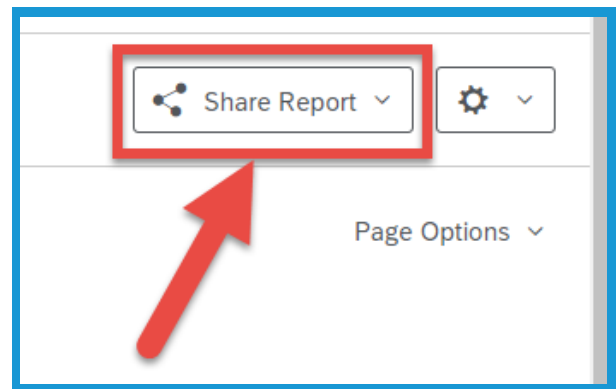
Section 1c: Creating a Report - Removing Questions

1. On the left side of the screen, **uncheck the question** to remove it from the report.

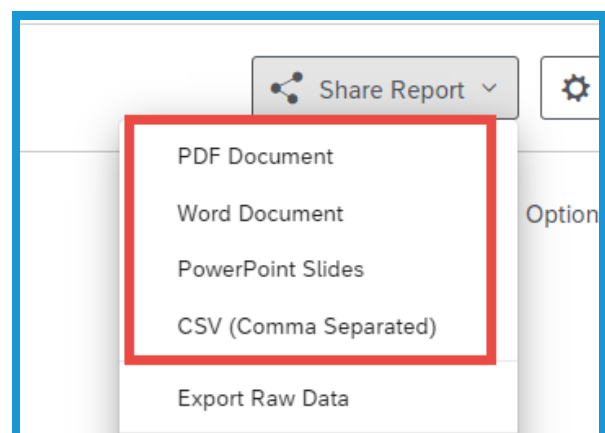


Section 1d: Creating a Report - Exporting Reports

1. Click the **Share Report button** in the upper right corner.

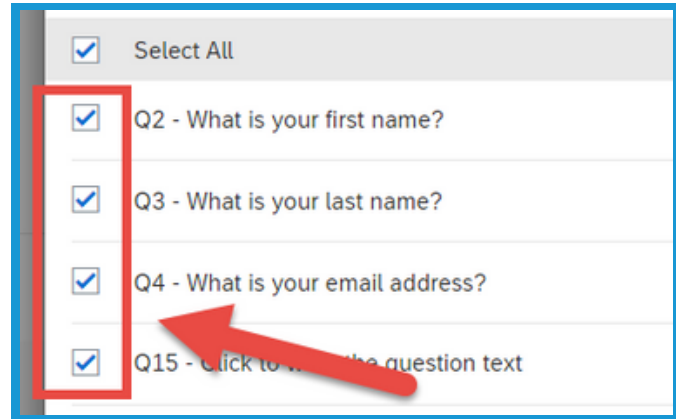


2. Choose the **format** that you want to utilize.

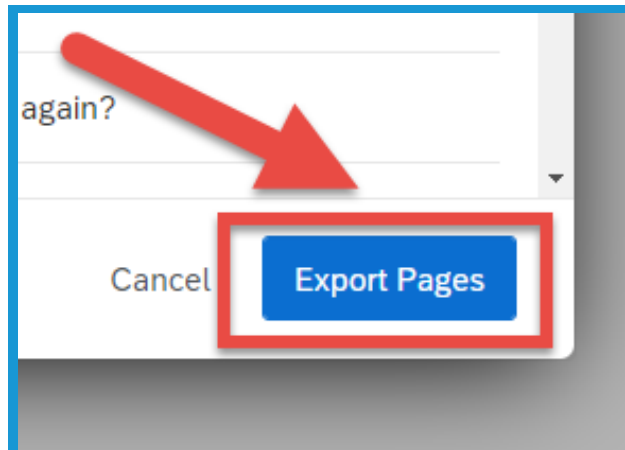


Section 1d: Creating a Report - Exporting Reports

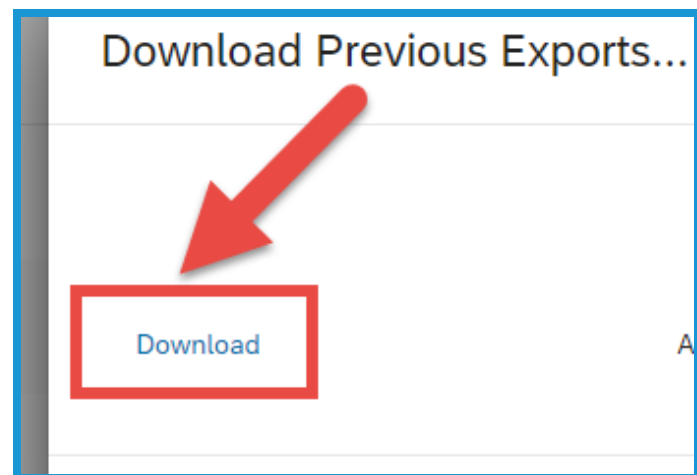
3. **Uncheck questions** in the new window if you want to remove them from the report.



4. Click **Export Pages** in the lower right.

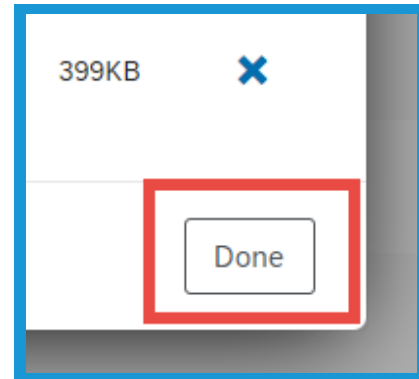


5. Click the **Download button** in the new window.



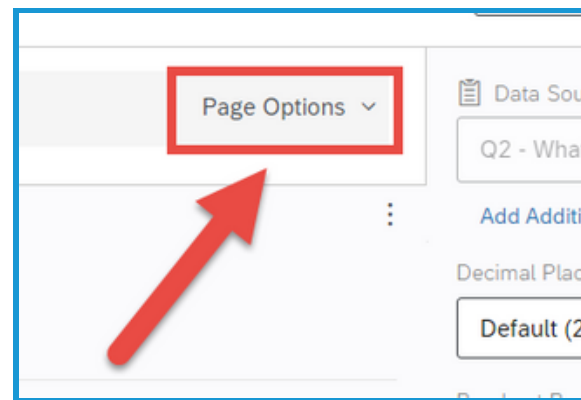
Section 1d: Creating a Report - Exporting Reports

6. Click **Done** in the lower right.

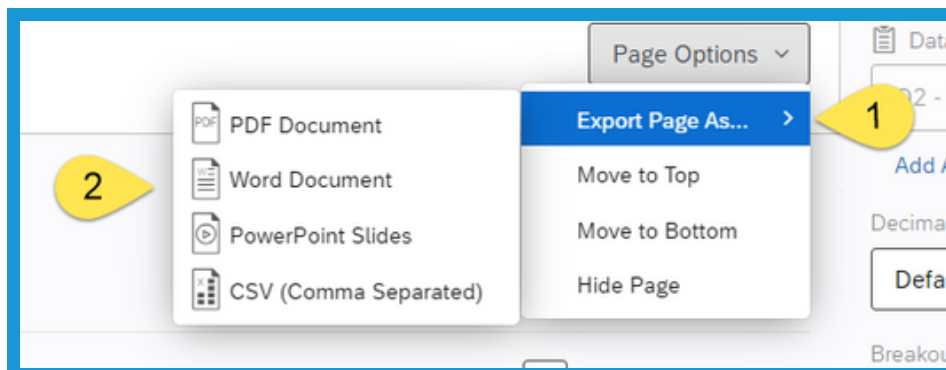


Section 1e: Creating a Report - Export Individual Graphs

1. Click **Page Options** in the upper right corner of the survey question.

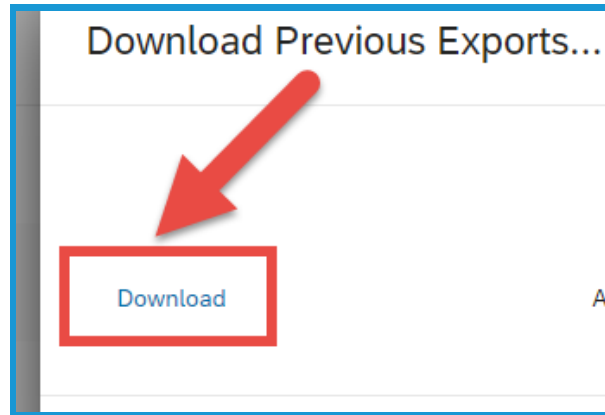


2. Place your mouse over **Export Page As (1)** and select the **desired format (2)**.

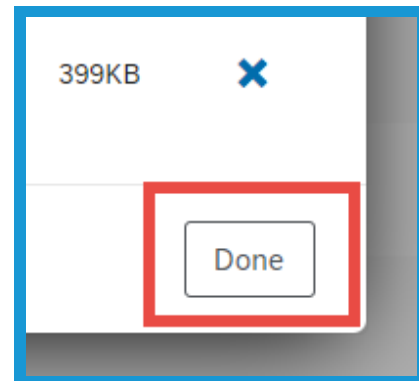


Section 1e: Creating a Report - Export Individual Graphs

3. Click the **Download** button in the new window.

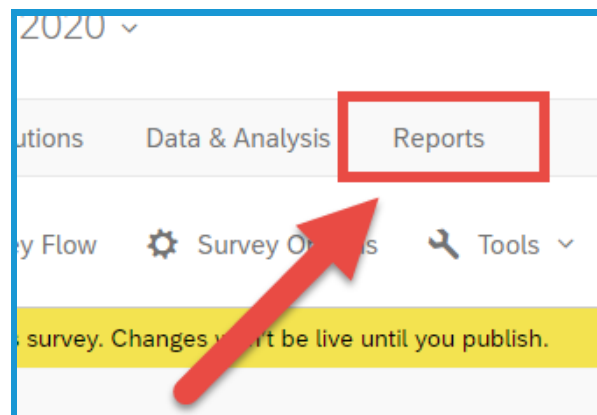


4. Click **Done** in the lower right.



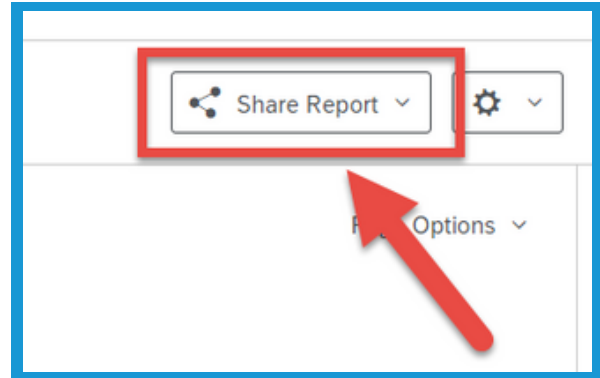
Section 1f: Creating a Report - Scheduling a Report

1. Click **Reports** in the upper left on the survey edit page.

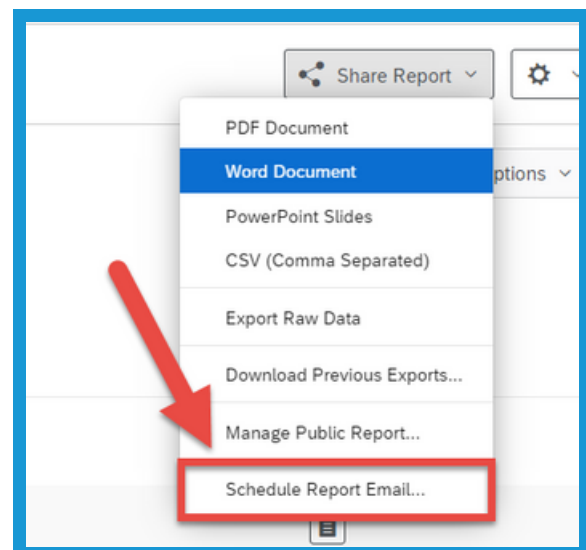


Section 1f: Creating a Report - Scheduling a Report

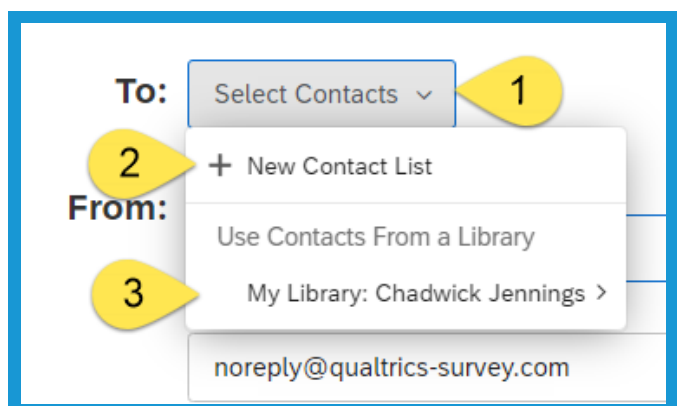
2. Click the **Share Report button** on the right side of the screen.



3. Select **Schedule Report Email** in the new dropdown menu.

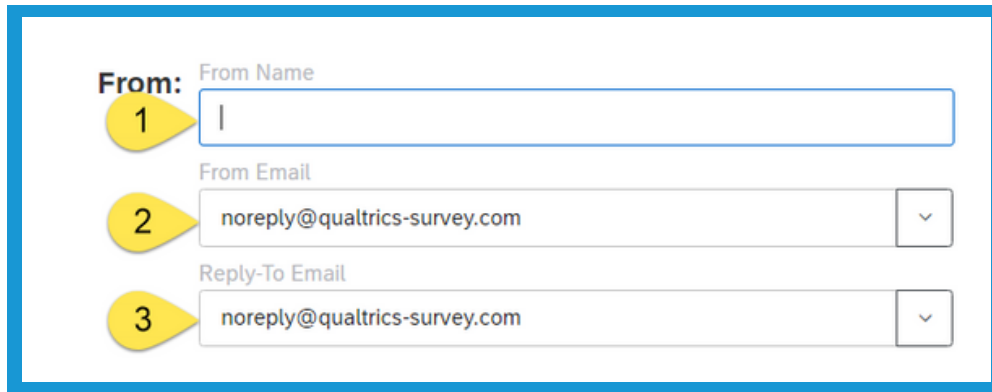


4. Click **Select Contact (1)** at the top of the new window. Select **New Contact List (2)** to create a email group or choose a previously created list from **My Library (3)**.



Section 1f: Creating a Report - Scheduling a Report

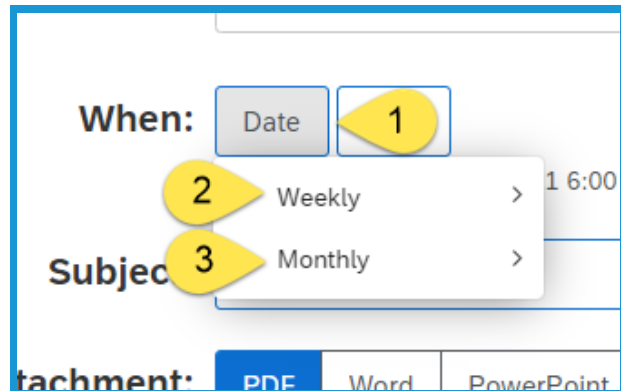
5. In the **From Name** field (1), type the name to display in the email. In the **From email** field (2), enter the email to send the report from. In the **Reply-To Email** field (3), enter the email that respondents can reply. You can opt to leave the **default no reply address** if you do not want to display your personal info.



The screenshot shows the 'From' configuration section. It includes three input fields, each with a yellow callout bubble containing a number:

- 1**: From Name (empty text box)
- 2**: From Email (dropdown menu showing 'noreply@qualtrics-survey.com')
- 3**: Reply-To Email (dropdown menu showing 'noreply@qualtrics-survey.com')

6. Select **Date** (1) in the When section. Place your mouse over **Weekly** (2) to select the day of the week you want the email to be sent, or place your mouse over **Monthly** (3) to schedule the day of the month.



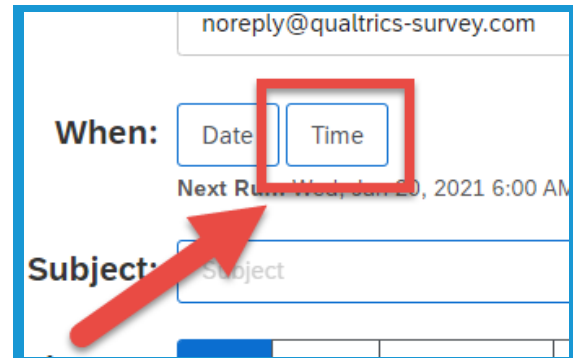
The screenshot shows the 'When' configuration section. It includes a dropdown menu with three options, each with a yellow callout bubble containing a number:

- 1**: Date (selected)
- 2**: Weekly
- 3**: Monthly

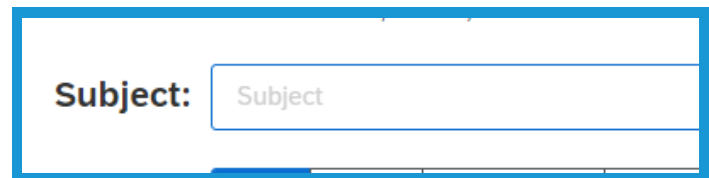
Below the dropdown, the 'Subject' field is partially visible. At the bottom, the 'Attachment' section shows options for PDF, Word, and PowerPoint.

Section 1f: Creating a Report - Scheduling a Report

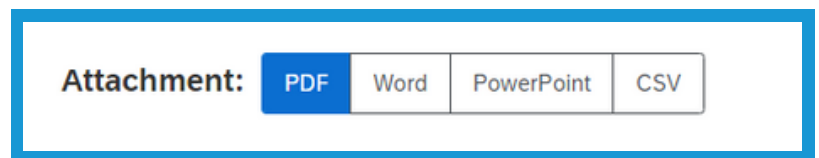
7. Click **Time** and select the hour you want the email to be sent.



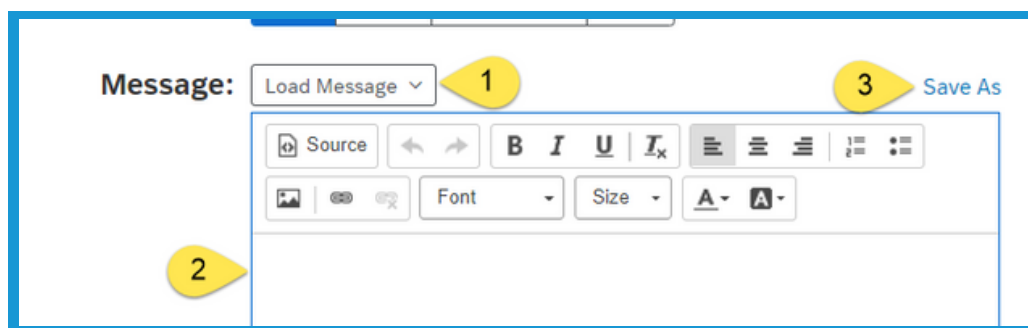
8. Click in the **Subject** field to enter the subject of the email.



9. Under **Attachment**, select the file format you want to use for the report.

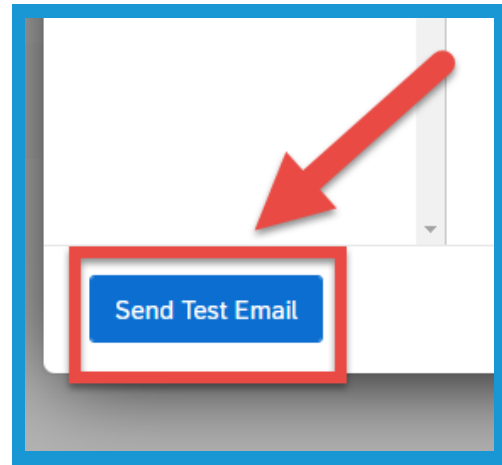


10. In the Message section, select the **Load Message (1)** dropdown menu to choose a previously drafted message. You also can draft a new message in the **message field (2)**. The new message can be added to the message library by selecting **Save As (3)**.

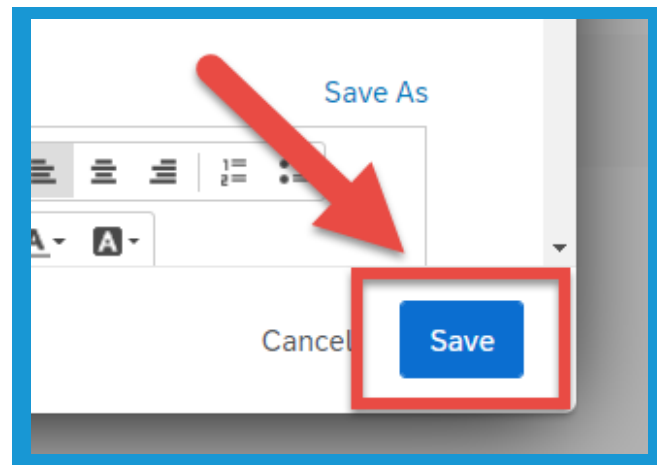


Section 1f: Creating a Report - Scheduling a Report

11. Select **Send Test Email** in the lower left corner to have a draft email sent to your address.

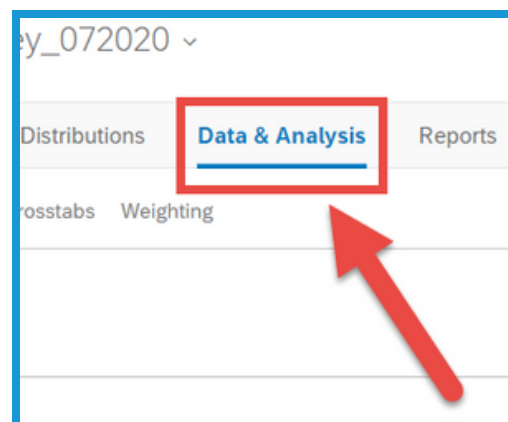


12. Select **Save** in the lower right corner to schedule the email.



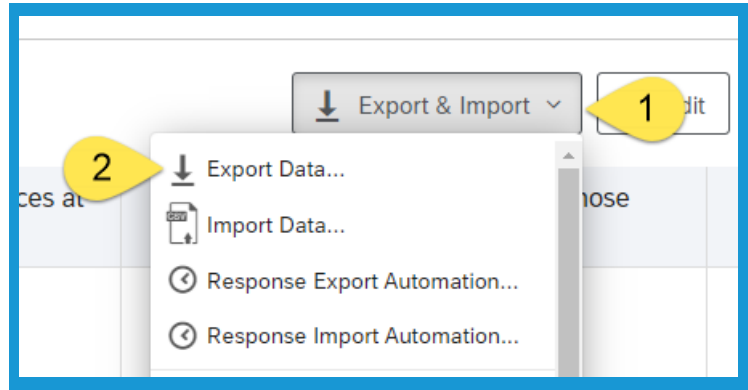
Section 2a: Exporting Raw Data - Pulling Data

1. Click **Data & Analysis** located at the top left of the edit page.

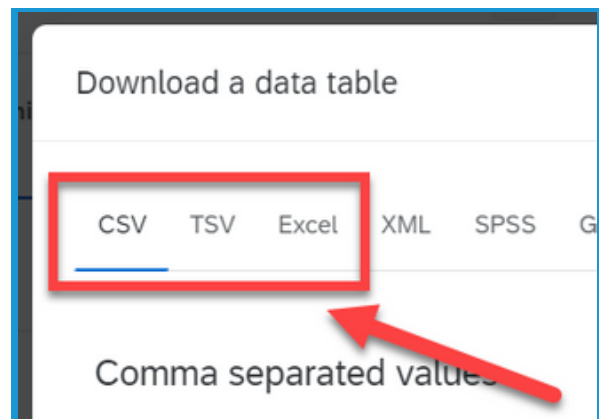


Section 2a: Exporting Raw Data - Pulling Data

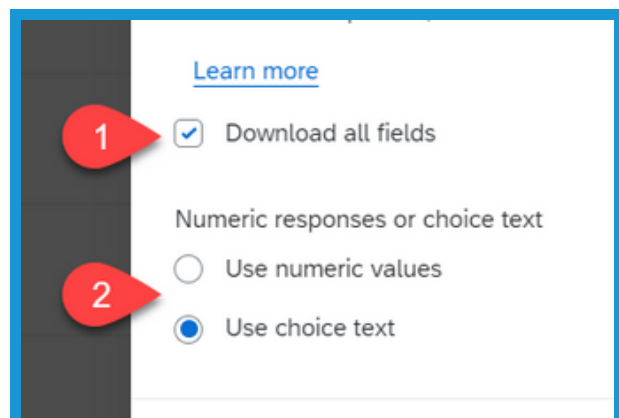
2. Click **Export & Import (1)** in the upper right, and then select **Export Data (2)**.



3. Select the **desired format** at the top of the new window.

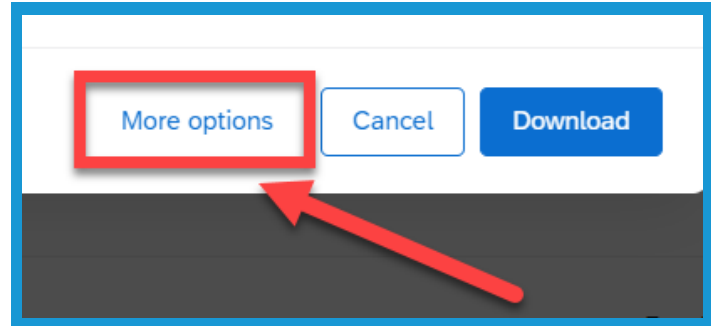


4. Uncheck **Download all fields (1)** to only export pre-chosen criteria. Also, decide if you want to export **choice text or the numeric values (2)**.

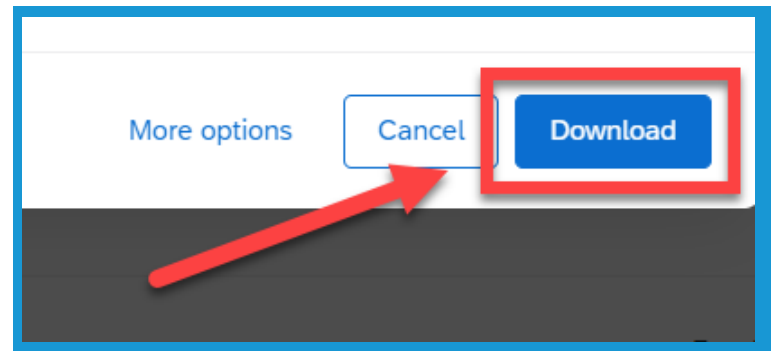


Section 2a: Exporting Raw Data - Pulling Data

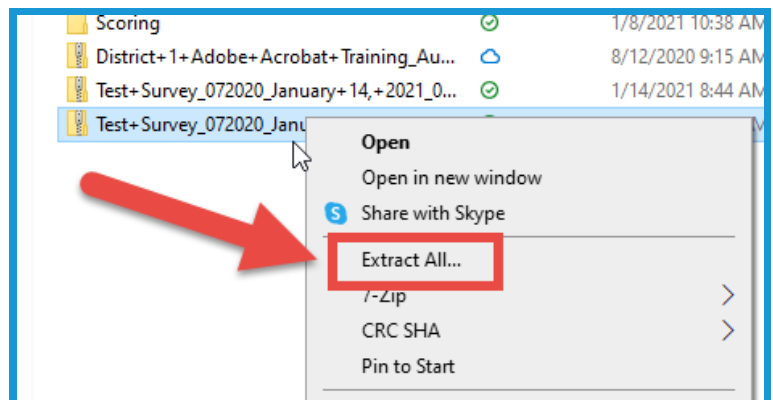
5. Click **More Options** in the lower right corner to see additional exporting options.



6. Click **Download** in the lower right corner, and save the file to the wanted location.

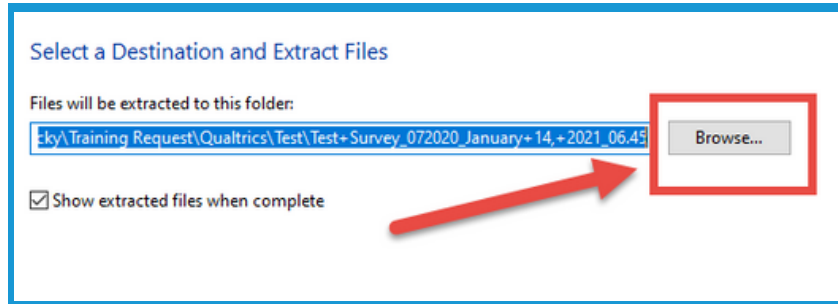


7. Navigate to the file in your File Explorer. **Right click** on the file, and select **Extract All**.

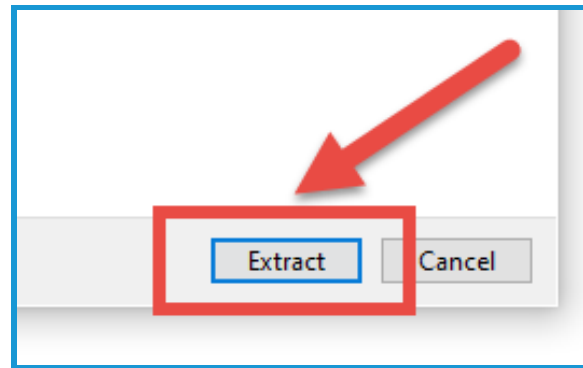


Section 2a: Exporting Raw Data - Pulling Data

8. Click **Browse** in the new window to chose where you want to extract the file. Please note that by default the file will be extracted to the location where you downloaded the zip file.

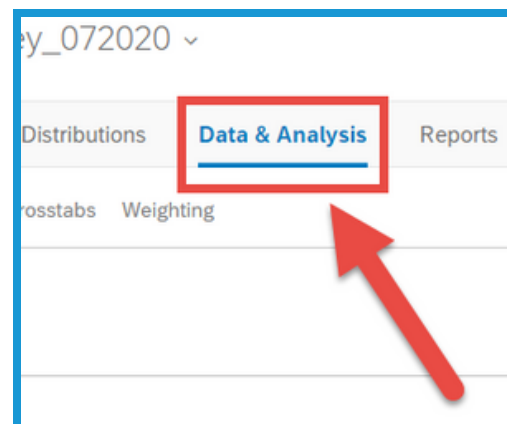


9. Click **Extract** in the lower right corner.



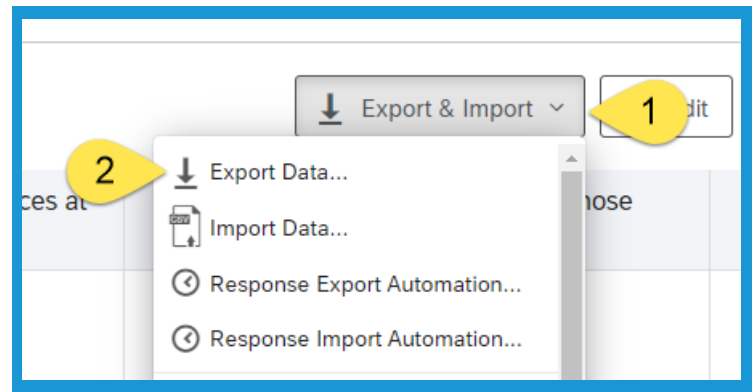
Section 2b: Exporting Raw Data - Submitted Files

1. Click **Data & Analysis** located at the top left of the edit page.

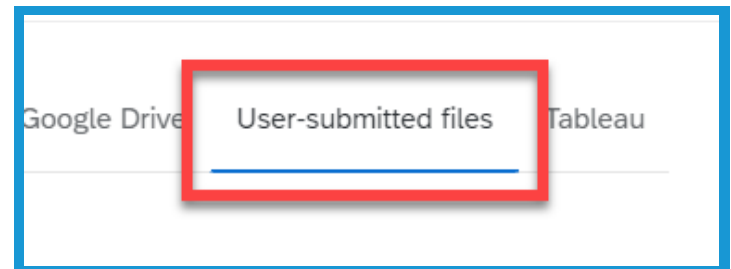


Section 2b: Exporting Raw Data - Submitted Files

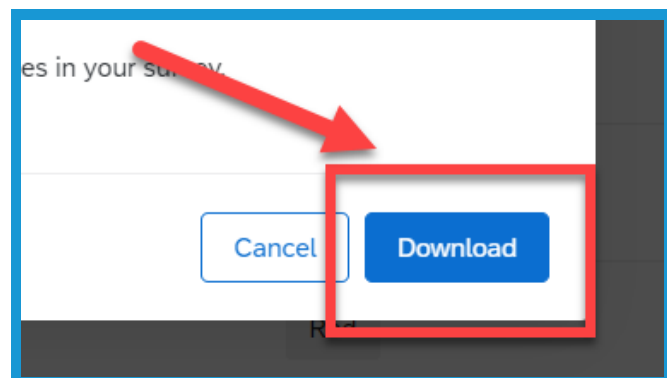
2. Click **Export & Import (1)** in the upper right, and then select **Export Data (2)**.



3. Select **User-submitted files** in the upper right side of the screen.

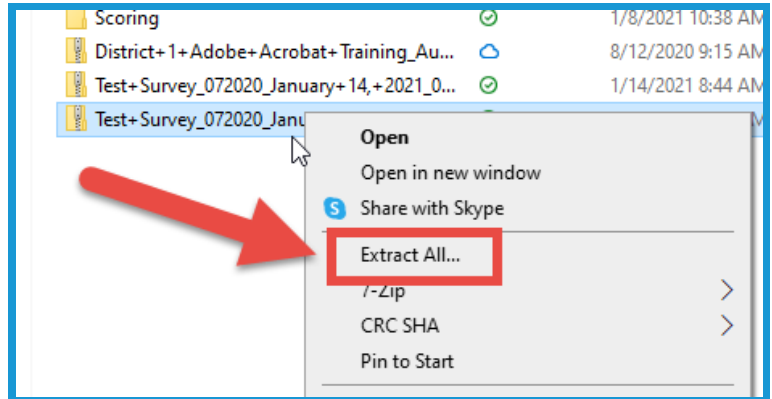


4. Click **Download** in the lower right corner, and save the file to the wanted location.

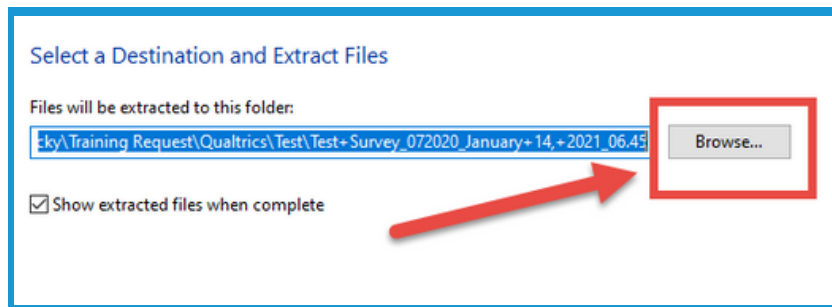


Section 2b: Exporting Raw Data - Submitted Files

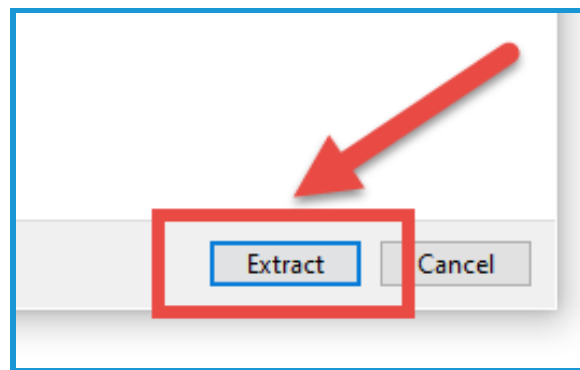
5. Navigate to the file in your File Explorer. **Right click** on the file, and select **Extract All**.



6. Click **Browse** in the new window to choose where you want to extract the file. Please note that by default the file will be extracted to the location where you downloaded the zip file.

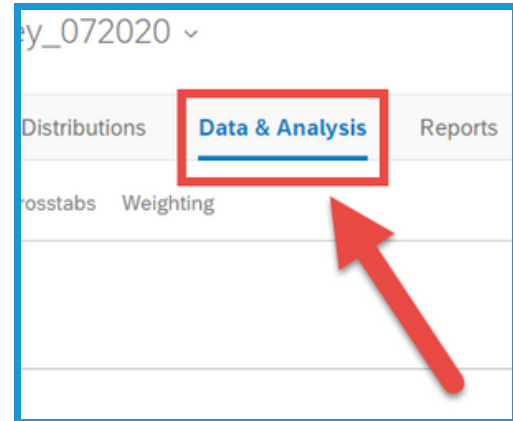


7. Click **Extract** in the lower right corner.

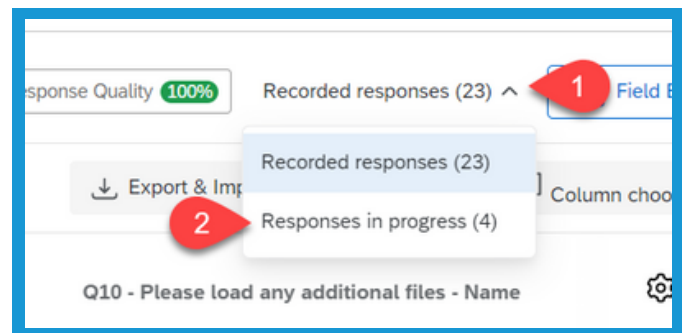


Section 2c: Exporting Raw Data - Responses in Progress

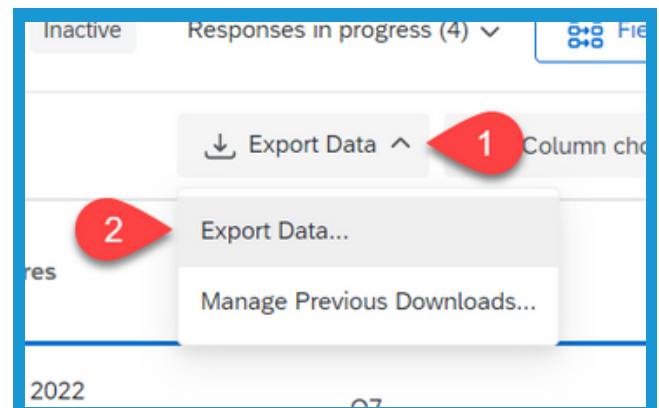
1. Click **Data & Analysis** located at the top left of the edit page.



2. Click the **Recorded responses** dropdown menu (1) in the upper right. Then select **Responses in progress** (2).

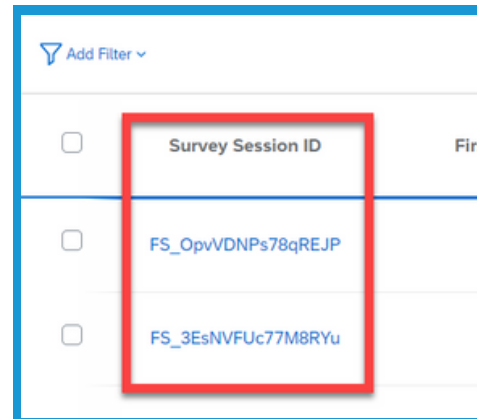


3. Click **Export Data** (1) in the upper right corner. Then select **Export Data** (2). Follow the steps covered in **Section 2a, page 13**, to pull the needed data.

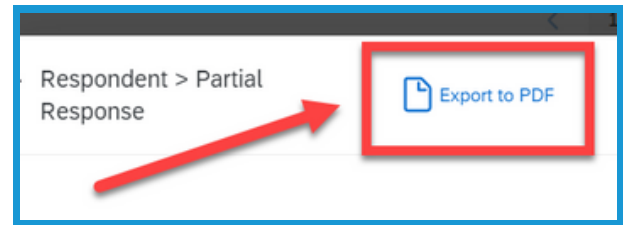


Section 2c: Exporting Raw Data - Responses in Progress

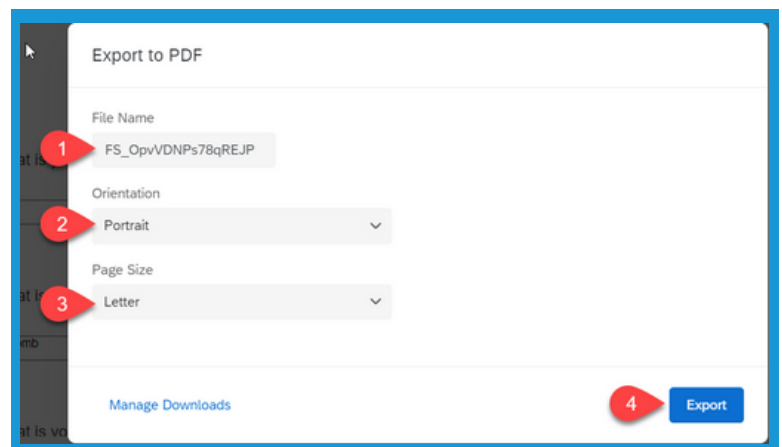
4. Click the **Survey Session ID** to view each person's individual responses.



5. Click the **Export to PDF** button in the upper left corner of the new window to export the responses.

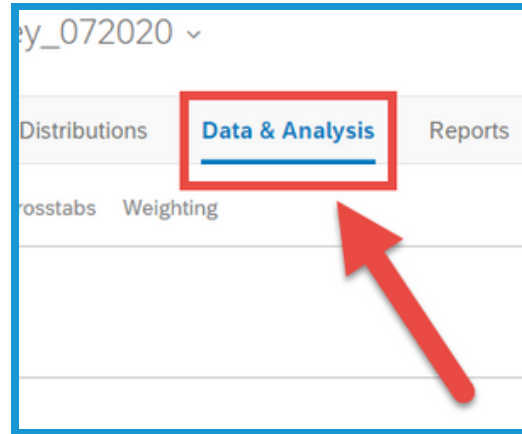


6. Give your report a **File Name (1)**. Choose the **Orientation (2)**, and the **Page Size (3)**. Then click **Export (4)** to save the PDF to the need location.

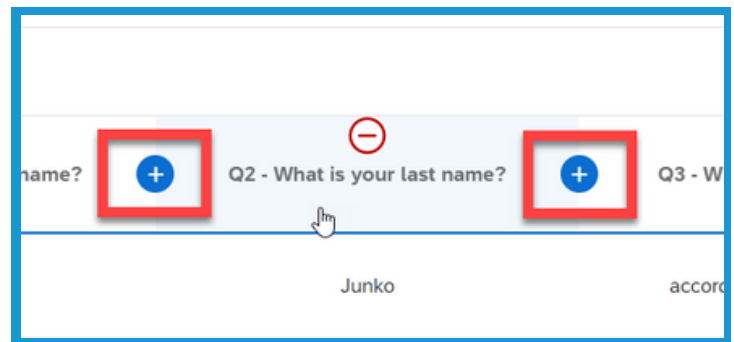


Section 2d: Exporting Raw Data - Report Building

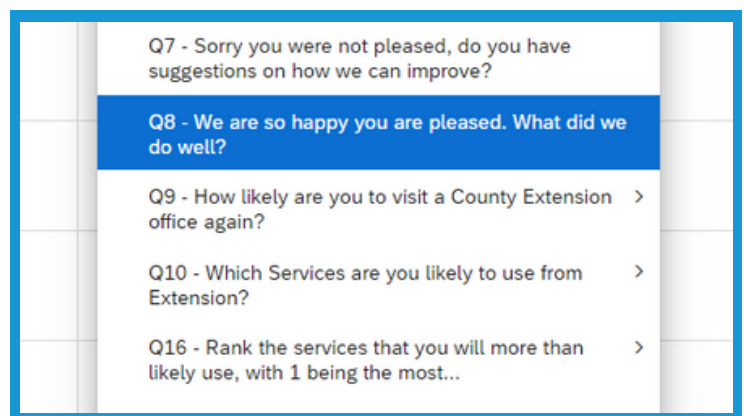
1. Click **Data & Analysis** located at the top left of the edit page.



2. Place your mouse over one of the existing questions at the bottom of the screen. Click the **plus sign** to the **left or right** of the question depending on where you want to put the information.



3. Select the **question** you are wanting to add to the report.

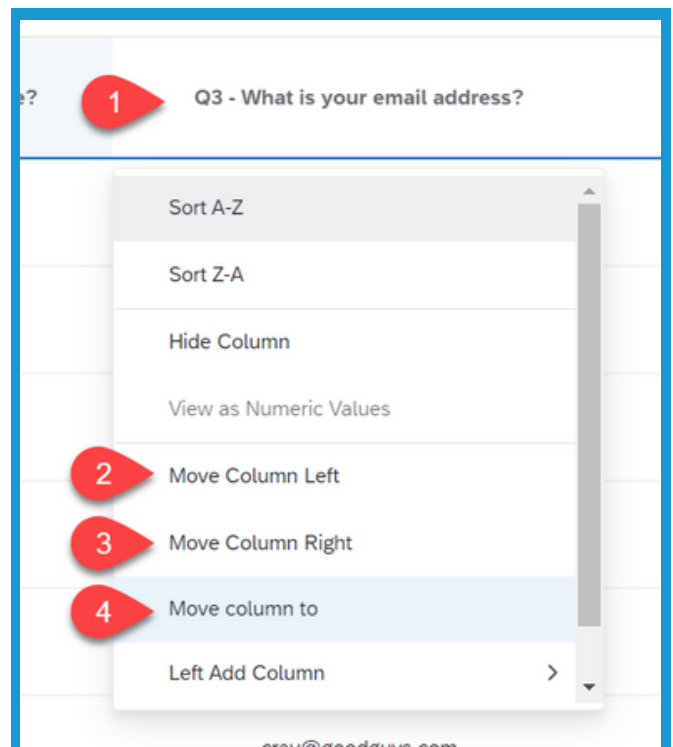


Section 2d: Exporting Raw Data - Report Building

4. To remove a column, place your mouse over that column. Click the **red minus sign** that appears above. You can easily add the information back by repeating step 2.

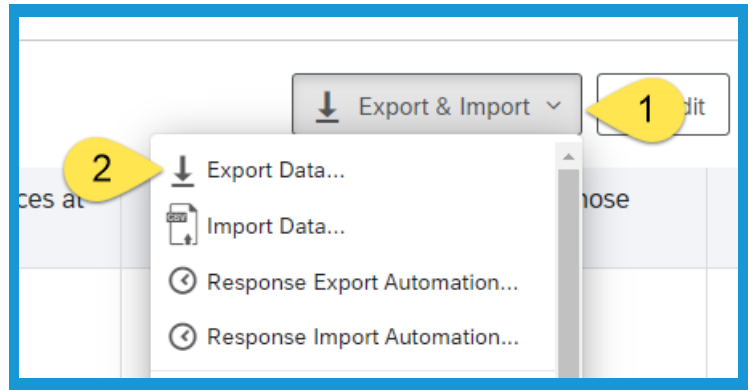


5. To move a column, **left click** on the **desired column title (1)**. Select **Move Column Left** or **Right (2)** to move the column one space. You can also select **Move column to (3)**, and choose a specific location.

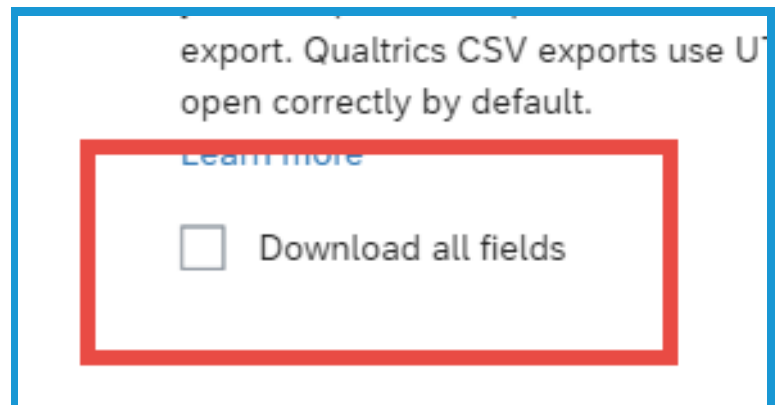


Section 2d: Exporting Raw Data - Report Building

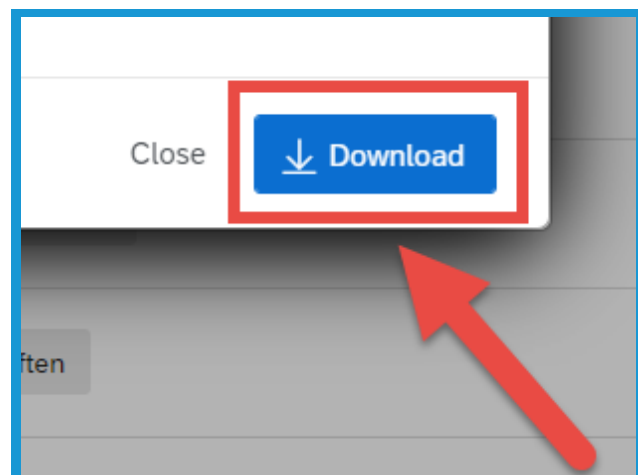
6. Click **Export & Import (1)** in the upper right, and then select **Export Data (2)**.



7. **Uncheck Download all fields** in the new window.

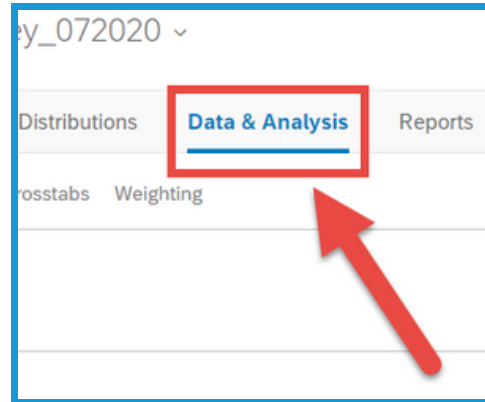


8. Click **Download** in the lower right corner, and save the file to the wanted location. **To extract the information follow steps 7-9 on Section 5a (pg 29).**

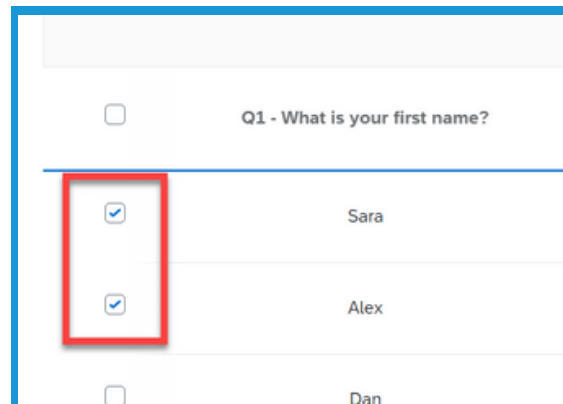


Section 3: Removing a Response

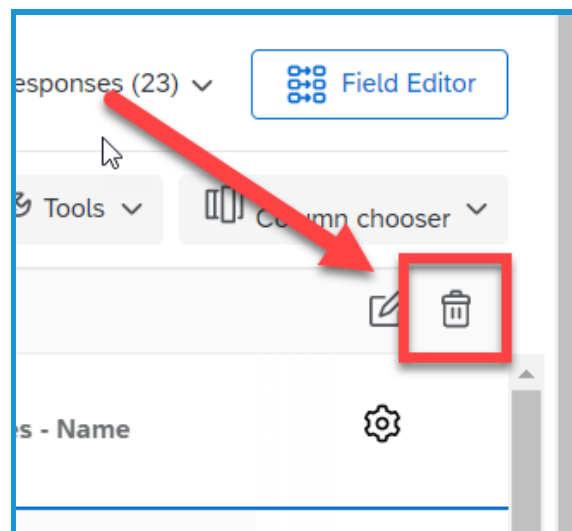
1. Click **Data & Analysis** located at the top left the edit page.



2. On the **far left**, select the check boxes to the row(s) of data to be removed.

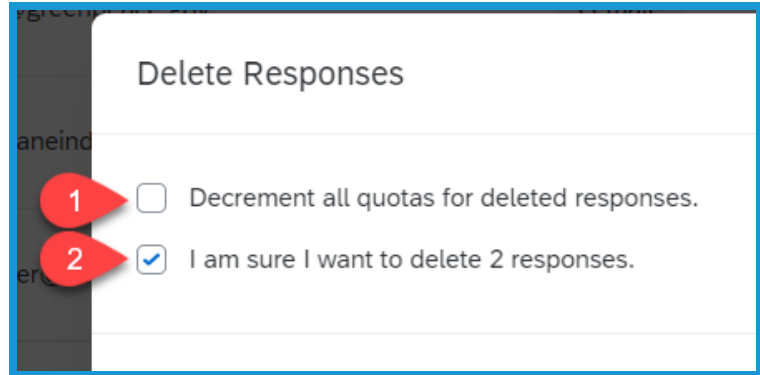


3. Select the **Trash Can** button in the upper right corner.

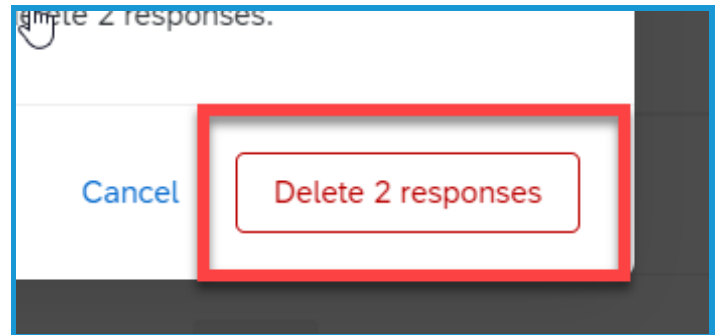


Section 3: Removing a Response

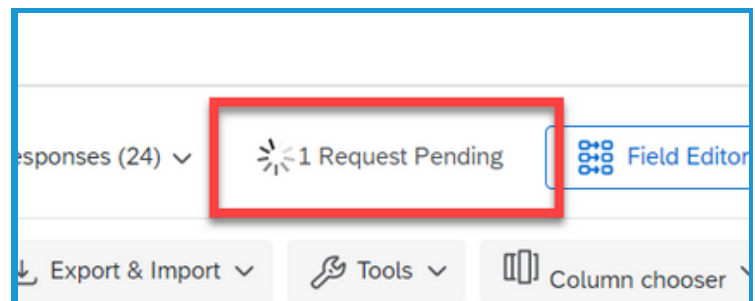
4. Check the box to **Decrement all quotas (1)** to not have the response be counted if quotas are enabled. Check the box to confirm the deletion **(2)**.



5. Select **Delete response(s)** to confirm the deletion.



6. You will see a Request Pending status appear in the upper right to confirm Qualtrics is working on the deletion. Your data will not be removed immediately. You can continue working in your survey, while the request is processed.





University of Kentucky
College of Agriculture,
Food and Environment
Cooperative Extension Service

Qualtrics: Reporting

**Any questions or training request:
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