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Qualtrics
REPORTING
creating and managing online surveys

Table of Contents

Reports Overview

In the Reports module, you can view answer summaries and create custom pages to visualize and manage aggregate results. You can create as many visualizations, pages, and reports as you want to explore and analyze your data.
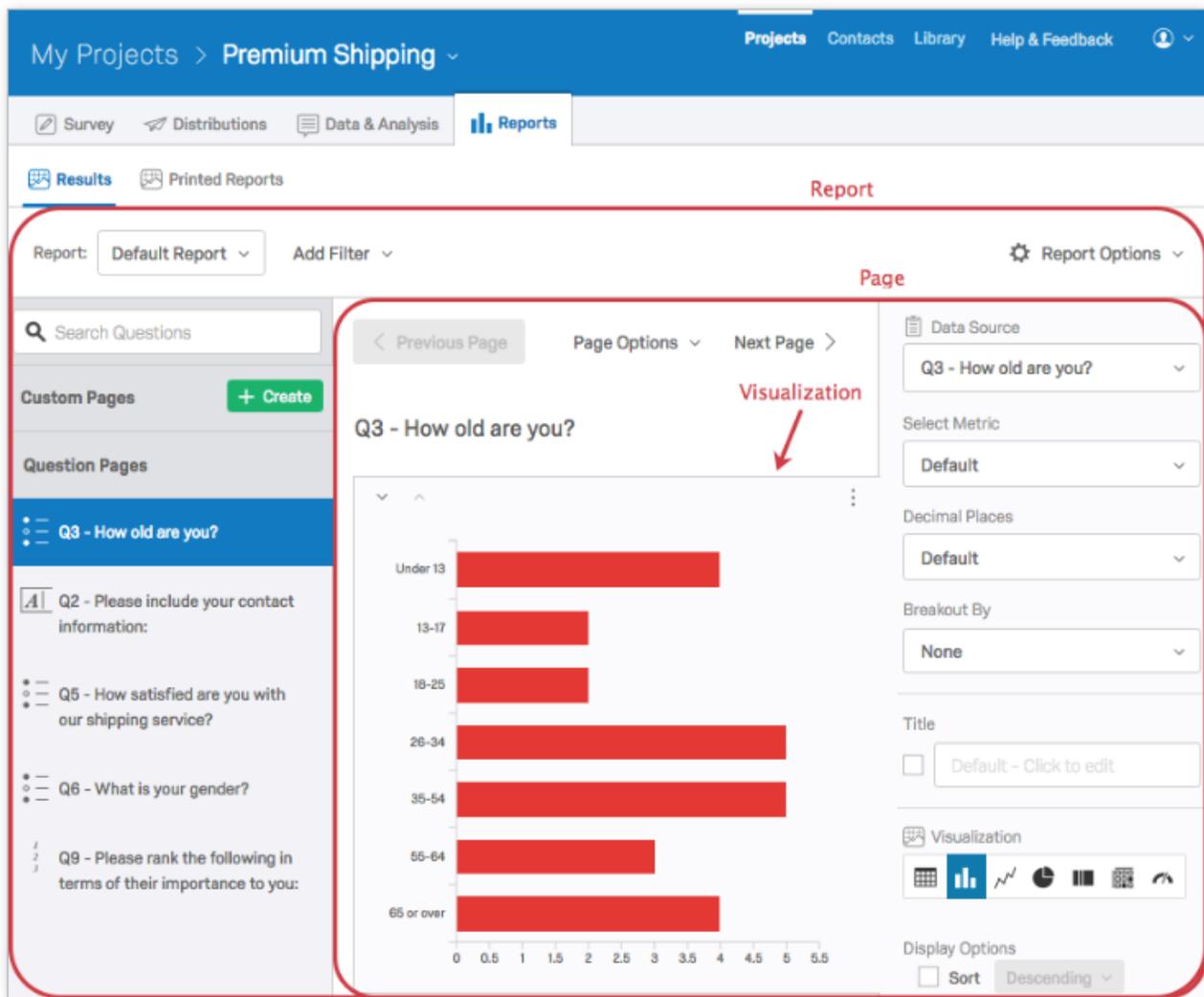
THREE PARTS OF REPORTING
The Qualtrics Insight Platform breaks reporting into three categories:

Visualization: An interface to view your data as a graph or a chart.
Pages: An area to explore and analyze your data and create visualizations.
**Report**: A collection of pages with filters or visualizations

Creating & Changing Reports

Report pages are scratchpads where you can explore and analyze your data and create insightful graphs and tables. You can use these pages to visualize your data and results.

Note: You will see a **Printed Reports** tab at the top of your account. This is Qualtrics' legacy reporting tool and works exactly how the reporting features did prior to the interface upgrade.
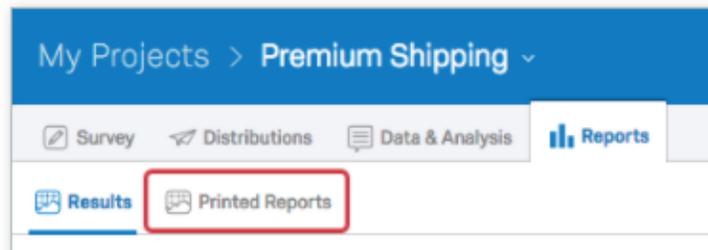
You can create a new custom page by clicking **Create** to the right of **Custom Pages**.
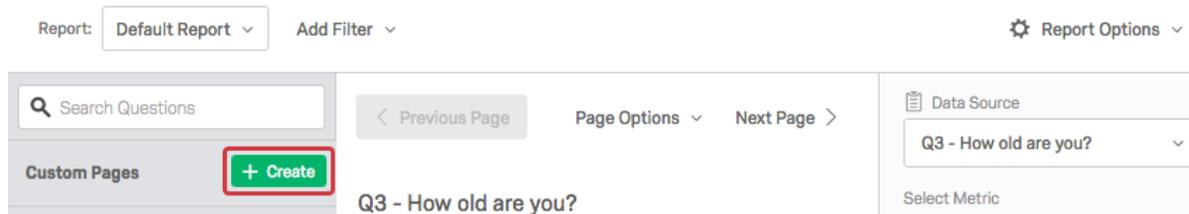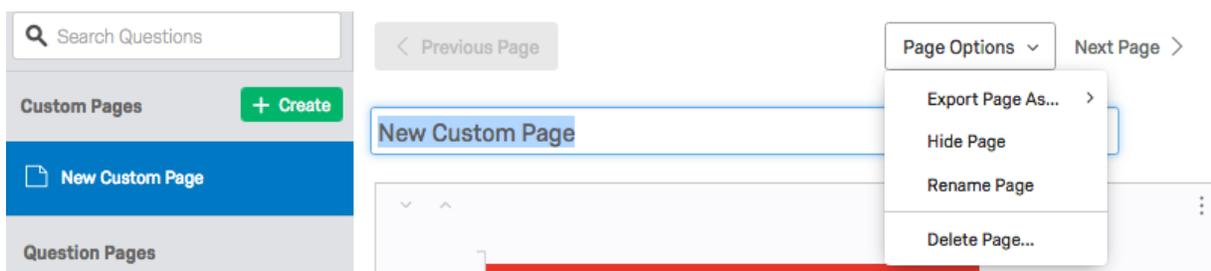

To change the name of your custom page, click on the name of the page inside the report editor. You can also find that action in the Page Options menu, which holds a few other options as well:

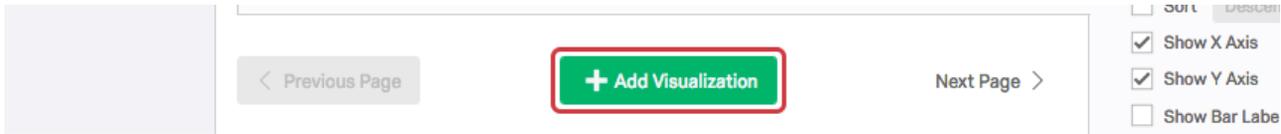**Export Page As**: Save your page as a PDF, Word, or CSV document.

Hide Page: Exclude your worksheet from your published and exported reports.

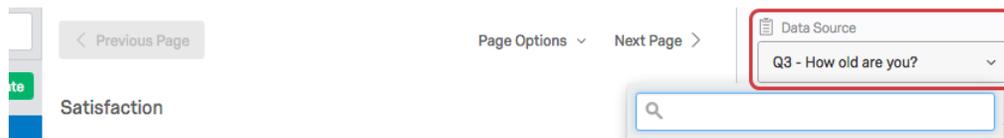**Delete Page:** Delete your worksheet.
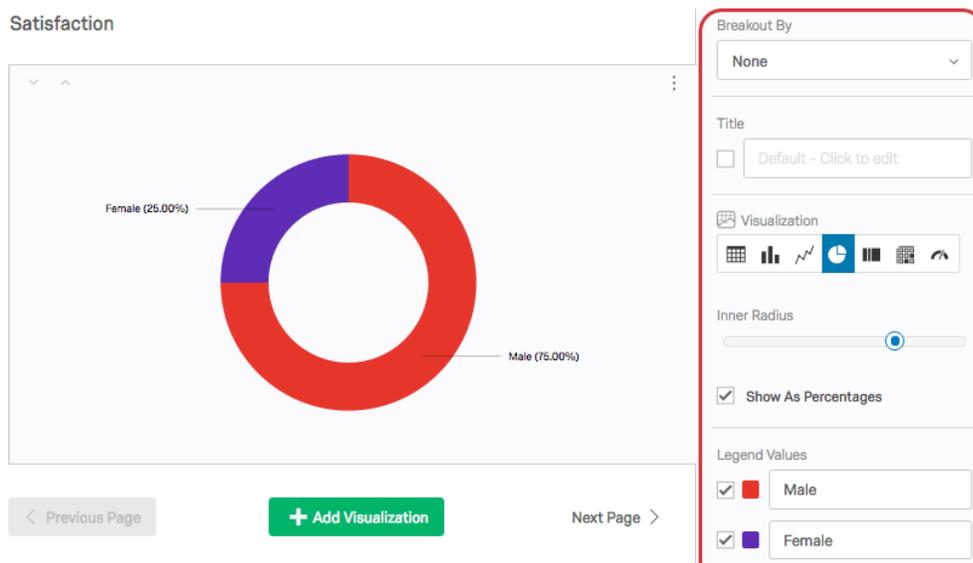
Adding & Arranging Visualizations

After creating a page, click **Add Visualization**, or modify the default visualization on the page.

Choose the **Data Source** (which question, survey metadata, or Embedded Data the visualization should display)

Adjust your visualization settings as needed. If desired, click **Add Visualization** again to add another.

Note: You can rearrange the order of both your pages and your visualizations. For pages, click to the left of the page name and drag it to the appropriate place. To move visualizations, click the up and down arrows in the upper left corner of each visualization.
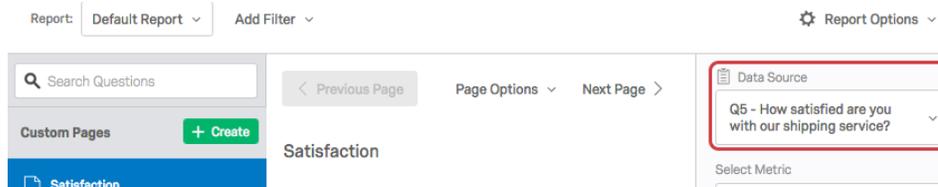
Visualizations & Data Sources

Visualizations are interfaces you can use to view your data as a graph or table. Question pages include default visualizations premade for you, and you can create new ones in your custom pages.

There are ten main types of visualizations:

- Bar Chart
- Line Chart
- Pie Chart
- Gauge Chart
- Simple Table
- Statistics Table
- Paginated Table
- Breakdown Bar
- Word Cloud
- Heat Map

DATA SOURCES

A data source is the specific response information you want your visualization to display. There are three main types of data sources you can represent in a visualization: survey metadata, question answers, and Embedded Data. Depending on the particular type of information you select, you'll have different visualizations available to use.

NOTE: Not every data source has access to every visualization since, depending on the context, not every visualization will make sense. For example, it doesn't make sense to have a Bar Chart option for Text Entry questions or a Statistics Table for Multiple Answer questions.

SURVEY METADATA

Survey metadata is information automatically collected when a respondent takes a survey. Survey metadata fields include the following:

- **Start Date:** The date and time the survey was started.
- **End Date:** The date and time the survey was completed.
- **Response Type:** The type of response collected (Preview, IP Address, Offline App, etc.)
- **IP Address:** The IP address collected from the respondent's browser.
- **Progress:** The percent to which the survey was completed.
- **Duration:** The number of seconds it took the respondent to complete the survey.
- **Finished:** The status of the respondent's survey (true = completed, false = partial).
- **Recorded Date:** The date and time the survey was recorded in the dataset.

EMBEDDED DATA

Embedded Data is any extra information you've recorded in addition to your question responses. These include Embedded Data fields set in the Survey Flow and custom columns added in the Data &

Analysis module. The type of data captured in the field can affect what types of visualizations are available.

Filtering Results

Sometimes you'll want to look at a specific subset of result information, rather than all the results from all your collected data. You can use filters to refine reports to show only results that meet specific criteria. Filters apply globally to a report, so once applied, all visualizations and pages in the report will be filtered to show only information that meets the filter criteria.
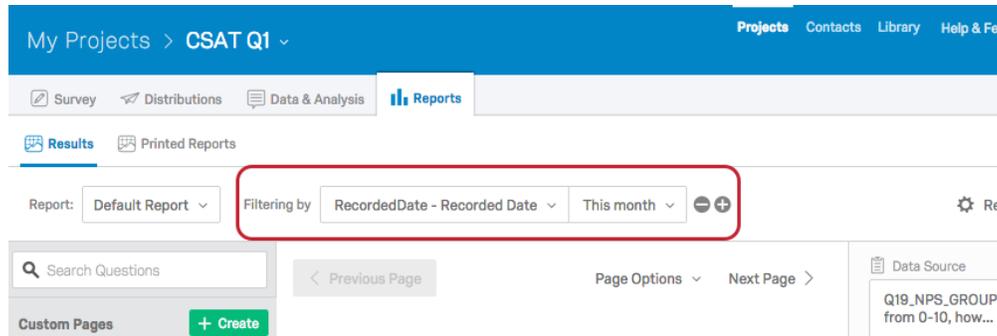
Constructing a filter condition is a matter of choosing and narrowing options until you have a full statement that outlines what responses you want displayed in your report.

ADDING A FILTER:

Navigate to the **Reports** module and open the desired report. Click **Add Filter.** Choose the filter criteria. Select the desired **Operator**. Select or enter the desired **Operand**(s). Click the plus and minus sign to add additional conditions or remove conditions
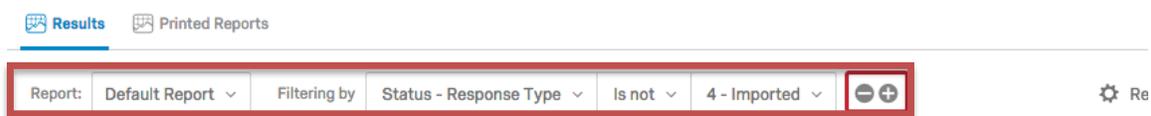
FIELD TYPES:

There are three main types of information (called "Fields") you can filter by: survey metadata, question answers, and Embedded Data.

MANAGING FILTERS:

You can add as many conditions as necessary to filter your reports. To create additional conditions, just click the plus sign to the right of the existing condition.

Exporting & Sharing

Qualtrics gives you a number of different options for exporting material created in your reports module. You can export your entire report, custom pages, or individual visualizations to a variety of formats.

TO EXPORT YOUR REPORT

Navigate to the **Reports** module and click **Report Options**. Choose **Export Report** and select the type of file you would like to export to.
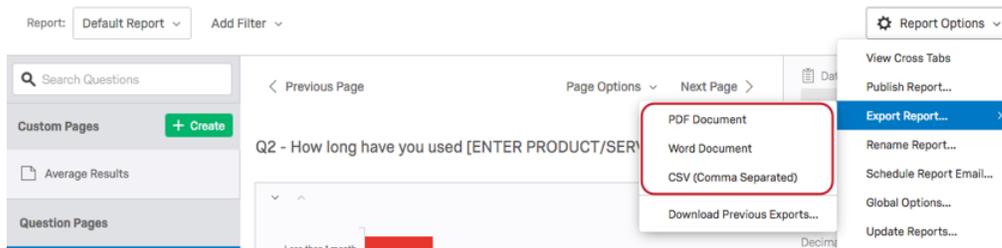

Select the pages from your report you would like to export (by default, all are selected). Click **Export Pages.** Then, click **Download** in the pop up box to download to your computer.
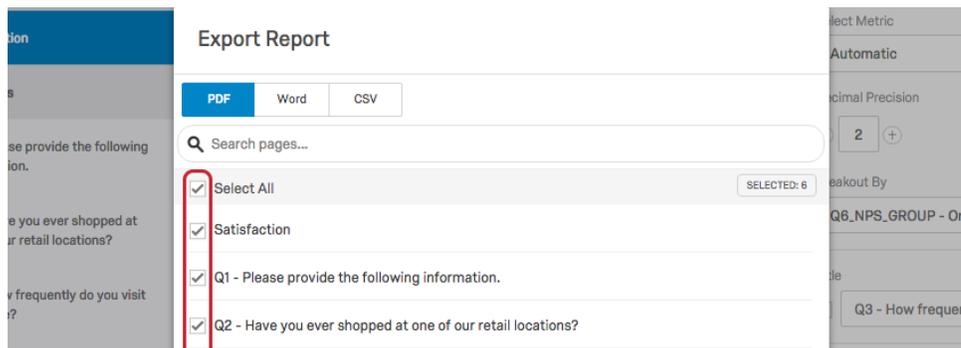

EXPORTING A CUSTOM PAGE

Navigate to the **Reports** module and click on the Custom Page you want to export. Click Page Options. Select **Export Page As** and select the type of file you would like to export to. Click Download in the pop up window to download the file to your computer.


9
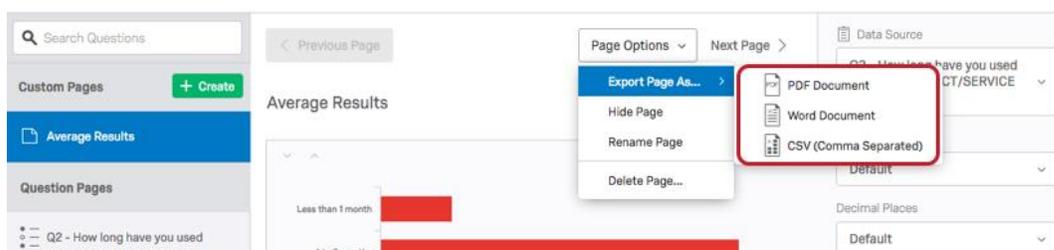
EXPORTING A VISUALIZATION

Navigate to the **Reports** module and locate the visualization you want to export. Click the options icon in the upper right corner. Click **Export** and select **Save Visualization as Image.** After clicking this option, your visualization will be automatically downloaded to your computer as a PNG file.
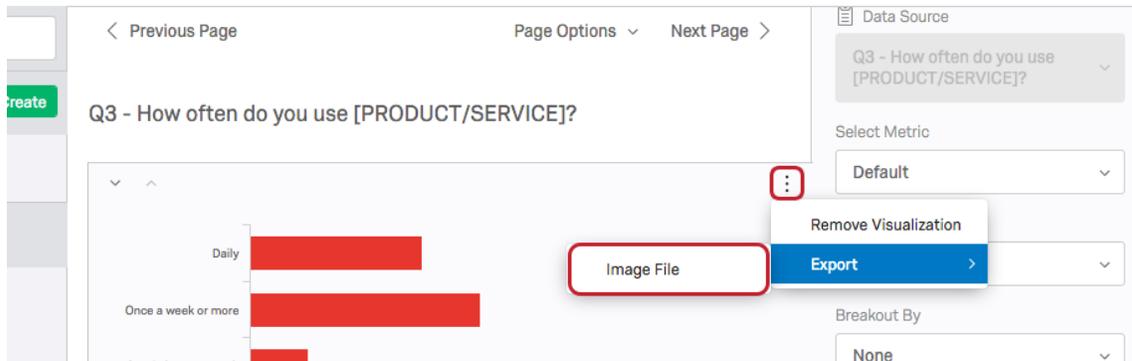

SHARING REPORTS – PUBLISHING REPORTS ONLINE

You can **Publish** your reports to the web and share the report links with others. These reports are dynamic, searchable, and interactive. In addition, your associates won't need to have a Qualtrics account to view the reports; they'll just need the link you provide.
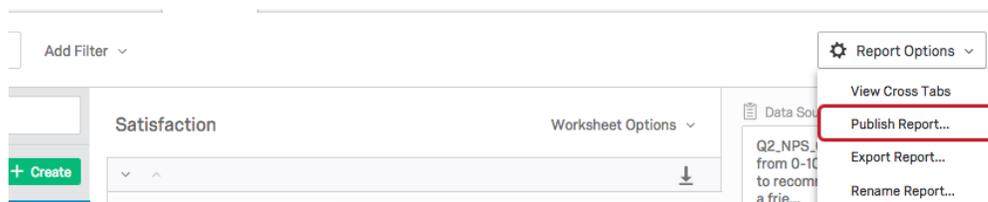
Navigate to the **Results** module and choose the report you want to publish. Click **Report Options** and choose **Publish Report**. Set **Published report available at the following link** to **On**. Copy the link (this is the link to your online report). Click **Save Settings.** Send the link out or paste the link into a browser to view.
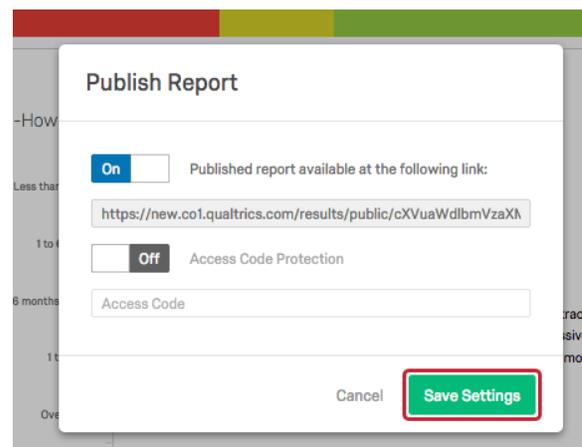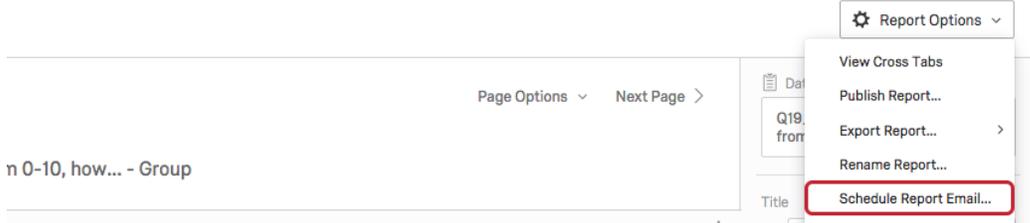
Scheduling Report Emails

Scheduled Report Emails allow you to send a copy of your report to a list of specified email addresses on a recurring basis. For example, you may need to send a report with your customer satisfaction metrics to your manager every week. With Scheduled Report Emails, you can set up this email once, and it will continue to send automatically each week without any more work from you.

Scheduled Report Emails will send the most up-to-date data in each mailing. Your emailed reports will dynamically include new response data and any update you've made to the report itself. With each mailing, you will send the most recent and relevant data to the desired individuals.

CREATING A REPORT

Navigate to the **Reports** module. Click **Report Options** and select **Schedule Report Email**.

Fill out all of the form fields in the email editor. Select the file format for the report that will be attached to your scheduled email. Construct the email message that will accompany your attached report. Add additional Scheduled Report Emails if desired. Name your Scheduled Report Emails by clicking on the name and typing out a new one. Click **Save** when you are finished.
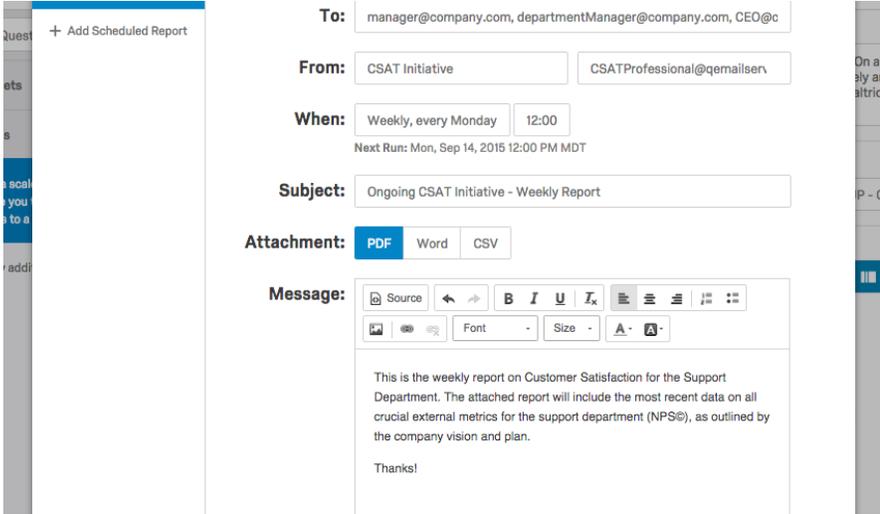
If you would like to test your scheduled report before actually saving it, you can click the **Send Test Email** button, located in the lower left corner. This allows you to send the report email to your own email address, where you can verify that it looks correct when viewed in an email inbox