

## Accessing and Editing Survey Records in Qualtrics

- All survey editing is done in Qualtrics , not the survey entry portal where you originally entered the pre/post-test surveys.
- Each agency has one login email/username and password. If you aren't sure what your Qualtrics login information is contact [heather-hershberger@uiowa.edu](mailto:heather-hershberger@uiowa.edu), 319-335-4589.

1. Login to Qualtrics and on the My Projects main screen select the project you want (some agencies have several) and under Actions select Data & Analysis

	Project Name	Status	Last Modified	Creation Date	Responses	Actions	
r	 AGY02_COMP	● Active	Aug 17, 2016 10:46 AM	Aug 16, 2016 5:4		 Close	
r	 AGY02_COMPYY	● Active	Aug 17, 2016 11:56 AM	Aug 16, 2016 5:4		 Share Project	
r	 AGY02_PTM	● Active	Jan 11, 2016 3:04 PM	Oct 9, 2015 1:12		 Rename Project	
r	 AGY02_PTMY	● Active	Aug 16, 2016 4:50 PM	Nov 20, 2015 1:5		 Copy Project	
r	 AGY04_COMP	● Active	Aug 17, 2016 11:55 AM	Aug 16, 2016 5:1		 Edit Survey	
r	 AGY04_COMPYY	● Active	Aug 17, 2016 11:55 AM	Aug 16, 2016 5:1		 Preview Survey	
r	 AGY05_COMP	● Active	Aug 17, 2016 11:54 AM	Aug 16, 2016 5:2		 Translate Survey	
r	 AGY05_COMPYY	● Active	Aug 17, 2016 11:54 AM	Aug 16, 2016 5:2		 Distribute Survey	
						 Data & Analysis	
						 View Reports	
						 Delete Project	

2. View survey records on this page by clicking anywhere on the desired row

Recorded Date	ID - Participant ID Number	SRV - 1.a. Is this a pre-test or a post-test?	SRVYR - 1.b. What program year is this survey for?	MONTH - 2. What month is it?	DAY - 3. What day of month is it?
Sep 1, 2017 1:24 PM	02314570	Pre-test	1	August	25
Sep 1, 2017 1:23 PM	02314569	Pre-test	1	August	25
Sep 1, 2017 1:22 PM	02314568				25
Sep 1, 2017 1:20 PM	02314567				25
Sep 1, 2017 1:17 PM	02314566				25
Sep 1, 2017 1:12 PM	02314565				25
Sep 1, 2017 1:11 PM	02314564				25
Sep 1, 2017 1:09 PM	02314563				25
Sep 1, 2017 1:07 PM	02314562				25
Sep 1, 2017 1:05 PM	02314560				25
Sep 1, 2017	02314559				25

63.227.76.68

Recorded Sep 1, 2017 1:24 PM

Duration 00:01:04

Title 1.

**Comprehensive Prevention Survey**

Title 2.

**Administrative Section**

ID. Participant ID Number

02314570

1 of 1,075

Close

3. To download all raw survey data and view all your records click on the Export & Import tab and select Export Data

Survey Distributions **Data & Analysis** Reports

Data Text Cross Tabs

Add Filter Recorded Responses **366**  
Responses in Progress **0**

With Selected Page 1 of 19 Export & Import Tools

<input type="checkbox"/>	Recorded Date	ID - Participant ID Number	SRV - 1.a. Is this a pre-test or a post-test?	SRVYR - 1.b. What program year is this survey for?	MONTH - 2. What month is it?		
<input type="checkbox"/>	Aug 26, 2016 10:06 AM	"72167726"	Post-Test	1	May		
<input type="checkbox"/>	May 27, 2016 1:42 PM	"72167725"	Post-Test	1	May	19	
<input type="checkbox"/>	May 27, 2016 1:41 PM	"72167724"	Post-Test	1	May	19	
<input type="checkbox"/>	May 27, 2016 1:39 PM	"72167723"	Post-Test	1	May	19	

Export & Import

**Export Data...**

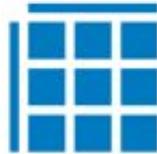
Import Data...

Manage Previous Downloads...

#### 4. Select Download Data Table

### Export Data

#### Download Data Table



Download columns and filtered data from the Data tool. This download cannot be imported into Qualtrics.

#### Export Data with Legacy Format



Export data for using the legacy Research Suite formats. This export does not include filters, tags, or custom columns. This export can be imported into Qualtrics.

Close

## 5. Use the CSV file format and download

### < Download Data Table

CSV

TSV

XML

SPSS



#### Comma separated values

This is a .csv file that can be imported into other programs. Each value in the response is separated by a comma and each response is separated by a newline character. If your responses contain special characters and you will open this export in Microsoft Excel we recommend using the TSV export. Qualtrics CSV exports use UTF-8 encoding, which Excel will not open correctly by default.

- Use commas for decimals
- Compress data as .zip file
- Download all fields
  - Use values as configured
  - Use numeric values
  - Use choice text

Close

Download

6. View survey data starting at column R with Participant ID Number. You can only view your data in Excel, if you see a record you want to edit go to step 7.

N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB
LocationL	LocationL	Distributi	UserLang	ID	SRV	SRVYR	MONTH	DAY	YEAR	AGY	PROG	LENGTH	CURR	LOC
Location L	Location L	Distributi	User Lang	Participant ID	1. a. Is this	1.b. What	2. What m	3. What d	4. What ye	5. What is	6. What is	7. How lor	8. What is	9. Wha
'Importic	{}'Importic	{}'Importic	{}'Importic	{}'Importic	{}'Importic	{}'Importic	{}'Importic	{}'Importic	{}'Importic	{}'Importic	{}'Importic	{}'Importic	{}'Importic	{}'Impo
41.8564	-93.6572	anonymou	EN	2314338	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314326	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314334	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314337	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314335	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314333	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314322	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314320	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314328	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314330	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314329	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314332	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314327	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314323	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314325	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314331	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314336	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314319	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1
41.8564	-93.6572	anonymou	EN	2314321	Pre-test		1 August	29	2016	Youth and	Project Al	3	Middle Sc	1

7. If you want to edit a record you will go to the Qualtrics Data & Analysis page: Add Filter by ID – Participant ID Number (this is the best method for finding a record).

The screenshot shows the Qualtrics Data & Analysis interface. At the top, there are navigation tabs for Survey, Distributions, Data & Analysis (which is active), and Reports. Below these are sub-tabs for Data, Text, and Cross Tabs. The 'Add Filter' dropdown menu is open, showing a search bar and a list of filter options. The option 'ID - Participant ID Number' is highlighted in blue. Other options include Survey Metadata, Contact Fields, Embedded Data, SRV - 1.a. Is this a pre-test or a post-test?, SRVYR - 1.b. What program year is this survey for?, MONTH - 2. What month is it?, DAY - 3. What day of the month is it?, and YEAR - 4. What year is it?. In the background, a table is partially visible with columns for question text and a column labeled 'SRV'. The first row of the table contains the question 'SRV - 1.a. Is this a pre-test or a post-test?' and the value 'SRV'. Below this row, there are three rows, each with a 'Post-Test' label in a grey box.

Question	SRV
SRV - 1.a. Is this a pre-test or a post-test?	SRV
Post-Test	
Post-Test	
Post-Test	

8. Select Operator “Is” and enter the Participant ID Number, this will automatically generate the survey record(s) corresponding to that Participant ID Number

Data Text Cross Tabs

Filtering by ID - Participant ID Number **Select Operator** [Redacted]

Recorded Responses **366**  
Responses in Progress **0**

With Selected

Page 1 of 19

Export & Import Tools

	Recorded Date	ID - Participant Number	re-test or ?	SRVYR - 1.b. What program year is this survey for?	MONTH - 2. What month is it?	DAY - 3. What day of the month is it?	Actions
<input type="checkbox"/>	Aug 26, 2016 10:06 AM	"72167726"		1	May	19	▼

9. Under Actions choose one of the following:

- Retake Response to edit the survey (never choose Retake as New Response, this will create a duplicate survey record)
- View Response to view the survey as is without doing any editing
- Delete Response to delete the entire survey record

Data Text Cross Tabs

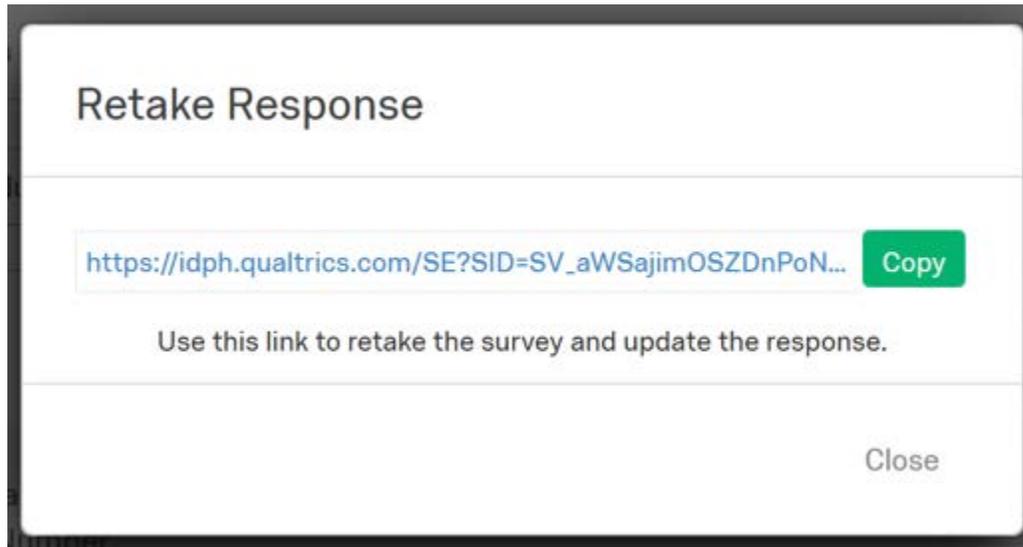
Filtering by ID - Participant ID Number is 72167726 [-] [+] Recorded Responses 366  
Responses in Progress 0

With Selected Page 1 of 1 Export & Import Tools

<input type="checkbox"/>	Recorded Date	ID - Participant ID Number	SRV - 1.a. Is this a pre-test or a post-test?	SRVYR - 1.b. What program year is this survey for?	MONTH - 2. What month is it?	DAY - 3. What day of the month is it?	Actions
<input checked="" type="checkbox"/>	Aug 26, 2016 10:06 AM	"72167726"	Post-Test	1	May	19	<ul style="list-style-type: none"> <li>View Response</li> <li>Delete Response</li> <li><b>Retake Response</b></li> <li>Retake as New Response</li> <li>Export to PDF</li> </ul>
<input type="checkbox"/>	Feb 2, 2016 11:32 AM	"72167726"	Pre-test	1	January		

Filtered Responses: 2 Page 1 of 1

10. Click on the survey link to go to your survey and once you finish editing hit Save and Continue at the bottom



11. The survey will automatically update after you save it so you can exit out of it

12. To view the updated survey go back to the Data & Analysis page, search for the Participant ID Number, choose the correct survey record, and under Actions choose View Response. You will need to re-download your data if you want to see the edited version in Excel. If you re-download your data into Excel the edited record will move rows so you will need to search by participant ID to find it.