



Migrating Results-Reports to Results-Dashboards
Help Document
Odum Institute November 2022

Qualtrics has released a new version of Results-Reports, called Results Dashboards. It is recommended to migrate to the new Results Dashboards now to avoid potential problems with any custom reports or scheduled report-based emails.

Beginning January 2023, Results-Reports will become read-only and cannot be edited. They will be accessible until April 2023, when they will be removed from the platform.

- Default Reports will automatically transfer to the new Dashboards.
- Custom reports will not transfer to the new dashboards and will need to be recreated.
- Emails scheduled in results-reports will not transfer and will need to be recreated in results dashboards.

Please see below for information about migrating to the new Results Dashboards.

For more information detailing this migration, please visit the Qualtrics support page [HERE](#).

For questions or assistance with this migration, you may reach out to the Odum Institute via email here: qualtrics@unc.edu.

Drop-In Qualtrics Consulting Hours:

Tuesdays 10am-12pm 228D, Davis Library

Tuesdays 2pm-4pm Virtual [Click here during regular hours to access the waiting room.](#)

Wednesdays 10am-12pm Virtual [Click here during regular hours to access the waiting room.](#)

Thursdays 1pm-3pm 228D, Davis Library

To request a virtual appointment outside these hours, email qualtrics@unc.edu

The Odum Institute for Research in Social Science is located in Davis Library on the 2nd Floor. For more information about the Odum Institute, visit <http://www.odum.unc.edu>

1. Why is this change happening?

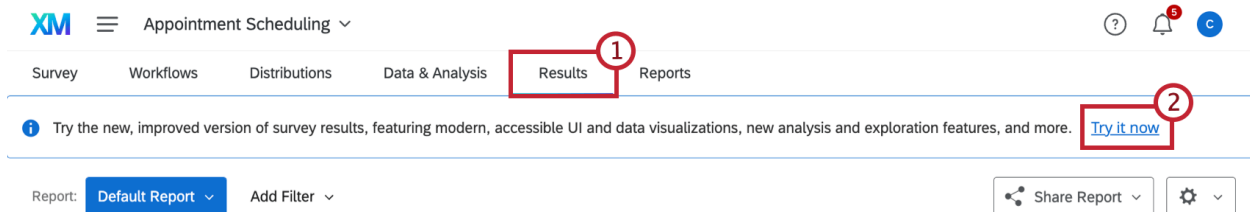
You'll notice the interface looks quite different. This is part of a larger project within Qualtrics. They have explained this change as improving the foundational design of their user experience across the platform over the course of several years to make sure their product is easy to use, consistent, predictable, and inclusive.

Improvements include:

- updated user interface to improve analytics, operations and storytelling
- several new widgets with new visual and information design, making data visualization easier to parse and understand
- new analysis features, such as statistical testing and comparisons, to give users more power and flexibility when analyzing data and building reports
- new widget and metric-level filtering feature to give users more flexibility when analyzing and exploring data.

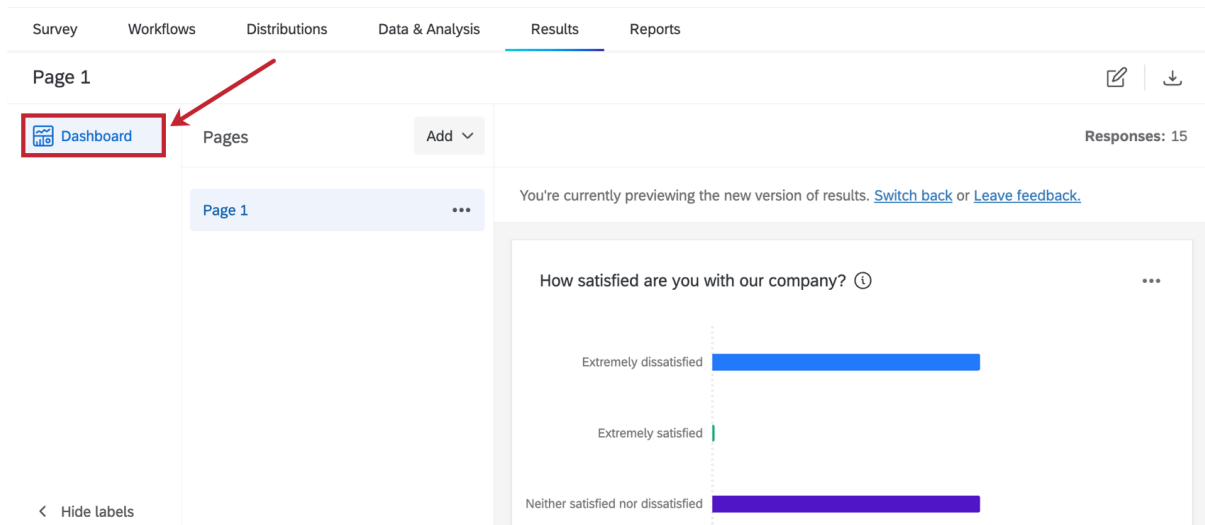
2. Getting Started:

From the "Results" tab, you'll see a banner alert inviting you to try the new Results Dashboard. Click on "Try it now" to switch to the new view. You can switch back until you're ready to fully migrate, however, **beginning January 2023, the current Results-Reports will be "view" only** so we are encouraging users to make the switch as soon as possible.

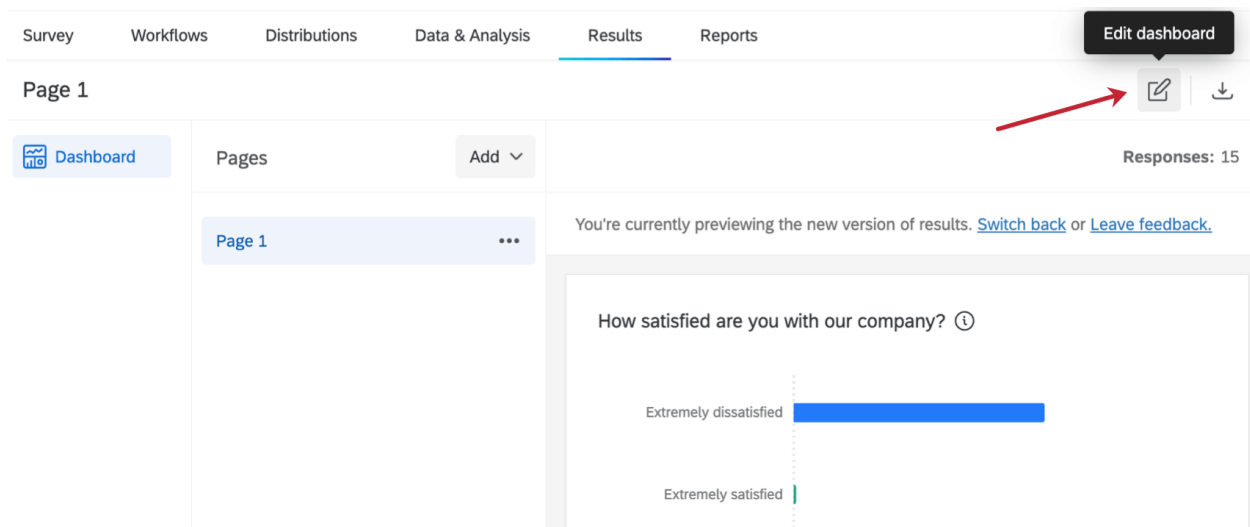


3. Adding & Editing reports pages:

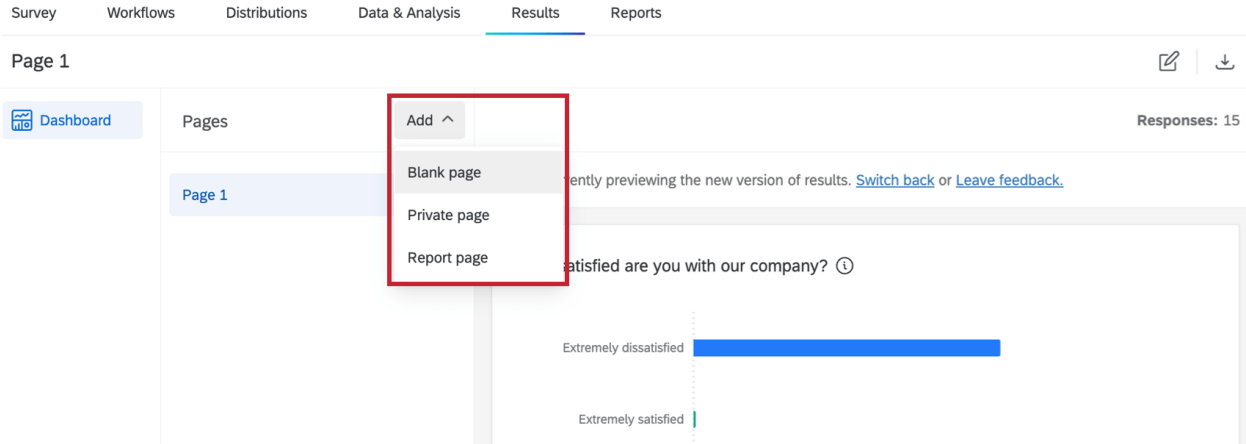
In Results Dashboards a dashboard will be created automatically with one default page. While you can add pages to this dashboard, there can only be one dashboard in a survey project.



Click the edit icon to make changes to your Results Dashboard. See [Adding & Editing Visualizations](#) for more information on editing specific widgets.

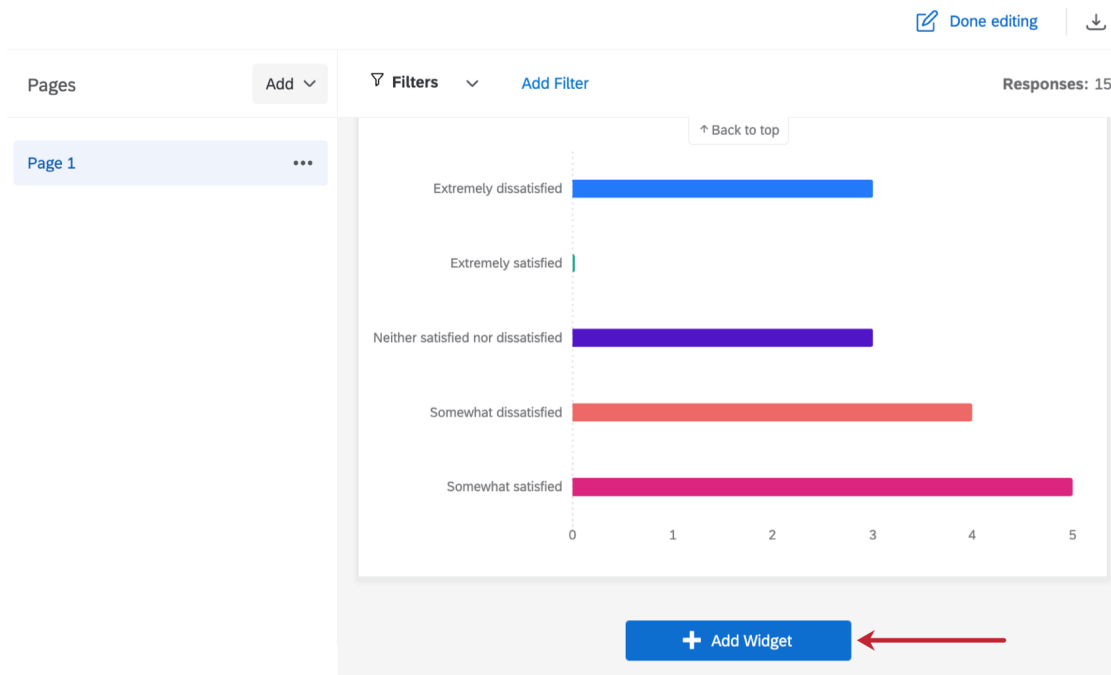


A default page will be created with a visualization for each survey question. This page is called a report page. Click **Add** to add a blank page, private page, or report page to your dashboard. See [Results Dashboards Pages](#) for more information.




4. Adding & Editing Widgets:

Widgets will be created for every question in your survey. Once you are in [editing mode](#), click **Add Widget** at the bottom of the page to add a new widget.



Once you are in [editing mode](#), double-click on a widget or click **Edit** to open the editing panel. You can also drag the corner of a widget to resize it or move the widget by clicking the three horizontal bars at the top and dragging it to your desired location. Click the three vertical dots to duplicate, remove, or move the widget to a different page.

Done editing | 

Pages Add ▾ Filters ▾ Add Filter Responses: 15

Page 1 ⋮

You're currently previewing the new version of results. [Switch back](#) or [Leave feedback](#).

Now Editing. Changes will apply to all viewers of this dashboard.

⋮ Edit

How satisfied are you with our company? ⓘ ⋮

Satisfaction Level	Count
Extremely dissatisfied	3
Extremely satisfied	1
Neither satisfied nor dissatisfied	3
Somewhat dissatisfied	4
Somewhat satisfied	5

Within the editing panel you can customize the widget, change the widget type, transpose the widget axes, remove the widget, and more. See [Results Dashboards Widgets](#) for more information.

Horizontal bars ▾

Data Display

Title

How satisfied are you with our company?

Description

Q1 - How satisfied are you with our company?

Show number of responses

Metrics Add

CNT Count

Y-axis

TEXT Q1 - How satisfied are you with our company?

Enable top/bottom N values

Results

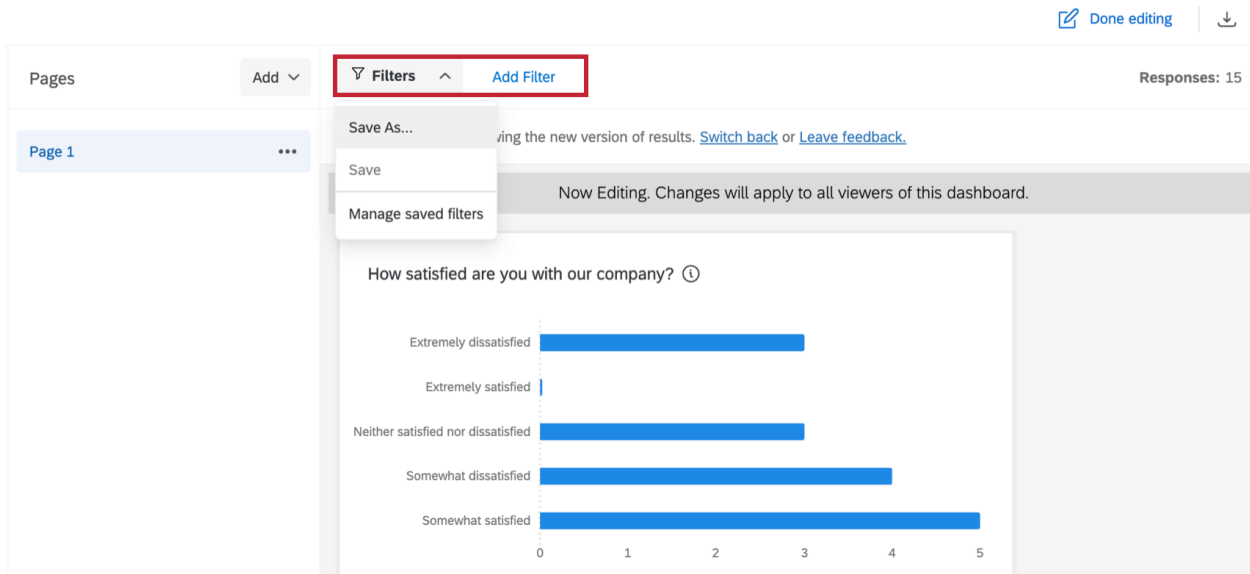
Close

How satisfied are you with our company? ⓘ

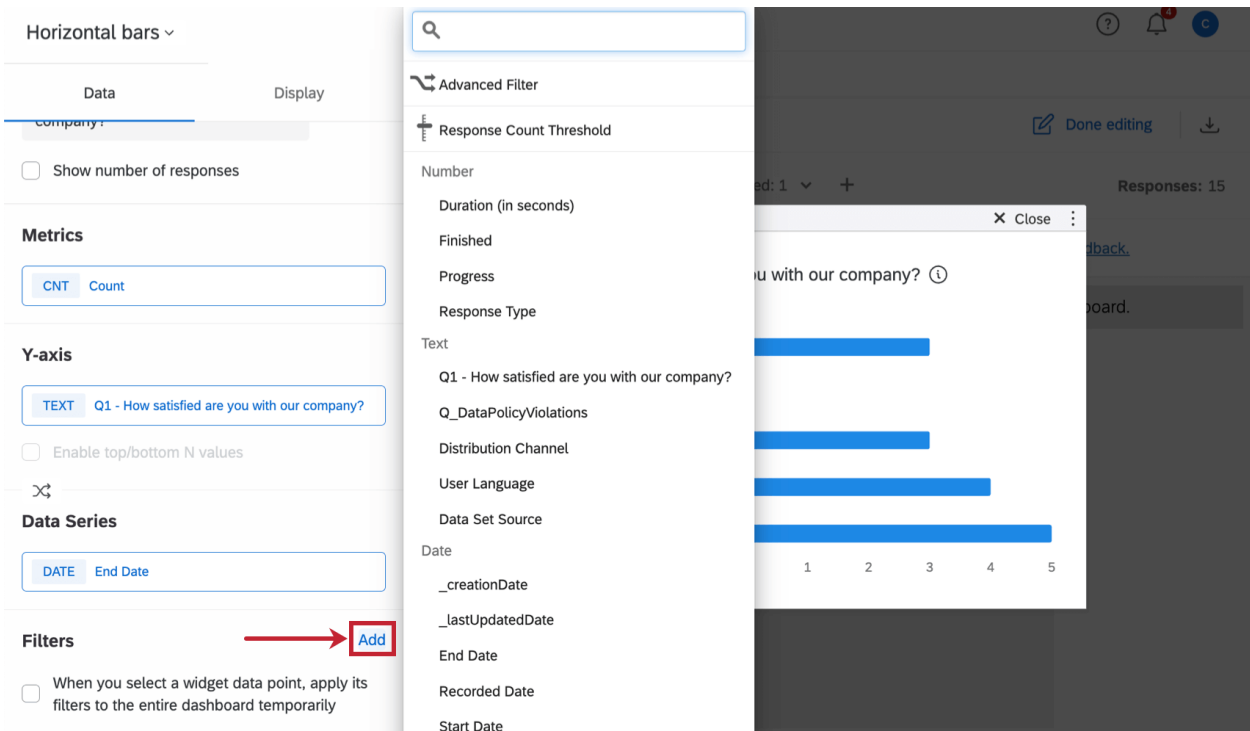
Satisfaction Level	Count
Extremely dissatisfied	3
Extremely satisfied	1
Neither satisfied nor dissatisfied	3
Somewhat dissatisfied	4
Somewhat satisfied	5

5. Adding Filters:

Click **Add Filter** when you are in [editing mode](#) to add a filter that will apply to all widgets on the page. Click **Filters** to save a filter or manage saved filters.



Filters can also be added to individual widgets. While editing a widget, click **Add** within the filters section to create a new filter.



6. Sharing results dashboards & recreating automated emails from results:

Click the download icon to download your dashboard or share it over email.

This is where you'll recreate any automated emails created from the results dashboard.

The screenshot shows a dashboard interface with a top navigation bar. On the left, there are 'Pages' and 'Page 1' sections. The main area contains a survey question: 'How satisfied are you with our company?'. Below the question is a horizontal bar chart with five categories: 'Extremely dissatisfied', 'Extremely satisfied', 'Neither satisfied nor dissatisfied', 'Somewhat dissatisfied', and 'Somewhat satisfied'. The x-axis represents a scale from 0 to 5. The bars show the following approximate values: 'Extremely dissatisfied' (3), 'Extremely satisfied' (0.5), 'Neither satisfied nor dissatisfied' (3), 'Somewhat dissatisfied' (4), and 'Somewhat satisfied' (5). In the top right corner, there are two icons: a share icon and a download icon. A red box highlights a dropdown menu that appears when the download icon is clicked, containing two options: 'Download dashboard' and 'Email dashboard'.

Satisfaction Level	Count (Approximate)
Extremely dissatisfied	3
Extremely satisfied	0.5
Neither satisfied nor dissatisfied	3
Somewhat dissatisfied	4
Somewhat satisfied	5