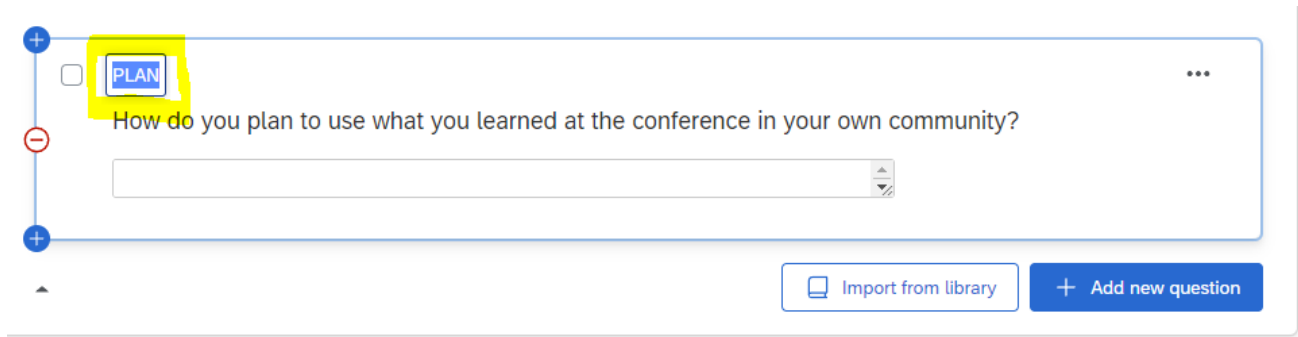


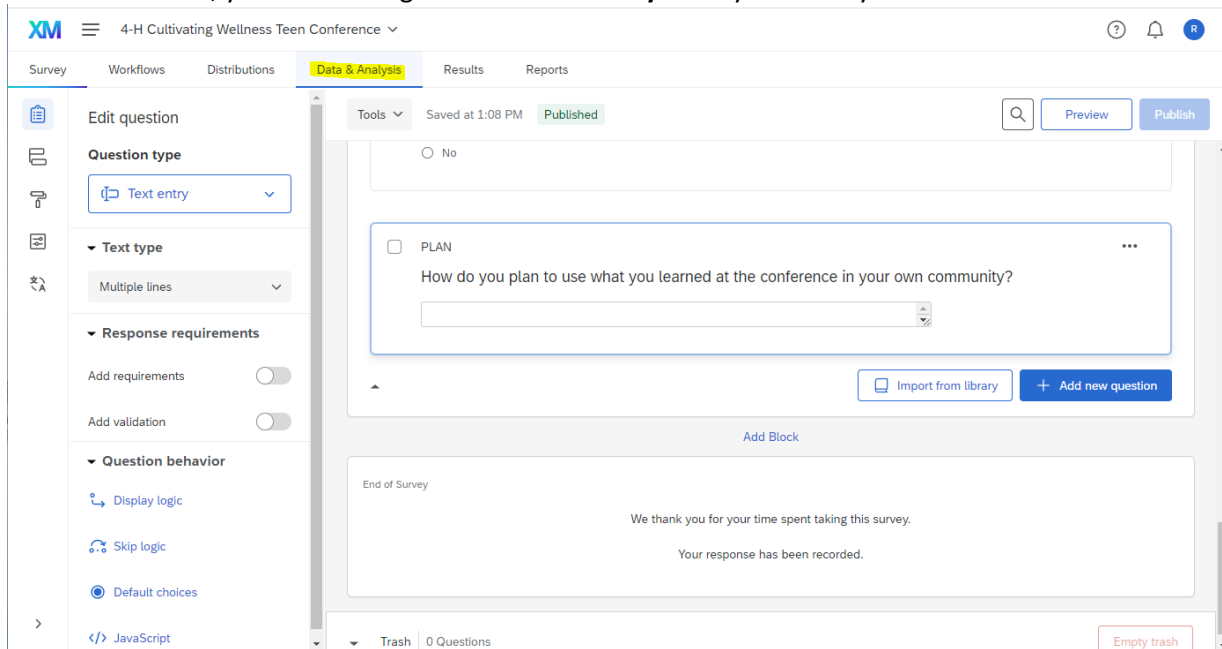
# Qualitative Coding in Qualtrics using Text iQ

In addition to multiple-choice questions, it is common to include open-response questions in evaluation surveys to gather more detailed feedback from program participants about their experience. Qualtrics has a new tool, Text iQ, which allows you to identify and tag themes (referred to as ‘topics’ in Qualtrics) in your open-response data, which can be useful when it comes time to summarize your data in a report.

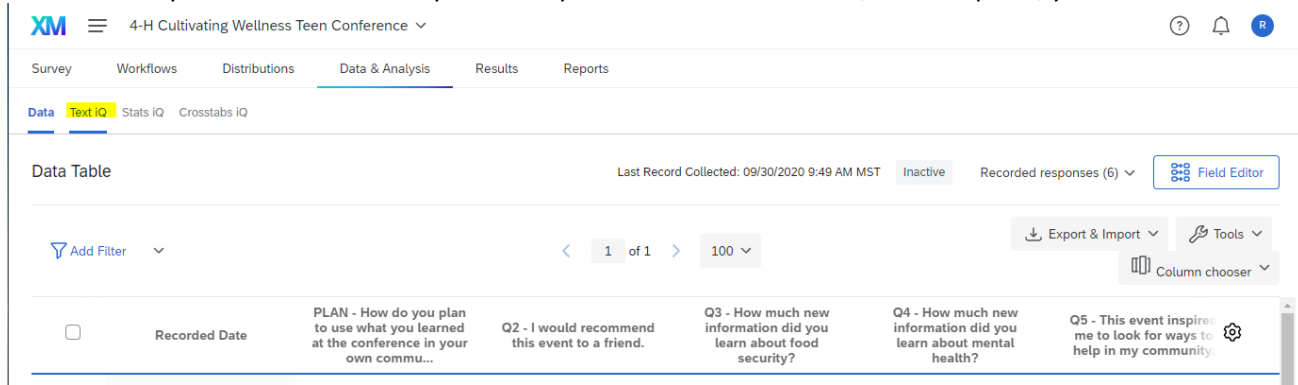
**Pro-Tip:** To set yourself up for success in using Text iQ, we recommend changing your question numbers to actual descriptive code names. In the example below, the question number has been renamed to ‘PLAN’ by simply clicking on the number and typing in a new name.



To access Text iQ, you’ll first navigate to ‘Data & Analysis’ in your survey.



This will take you to a table view of your survey results. Above the table, in the top left, you can select 'Text iQ.'



This will take you to a new window where you'll first select the open-response questions you'd like to code. You'll see part of the question text is cut off. Using our new descriptive code name ('PLAN') makes it easier to find and select the question we'd like to code. Check the box next to each question you'd like to include and then click 'Upload data.'

### Select the questions you want to analyze

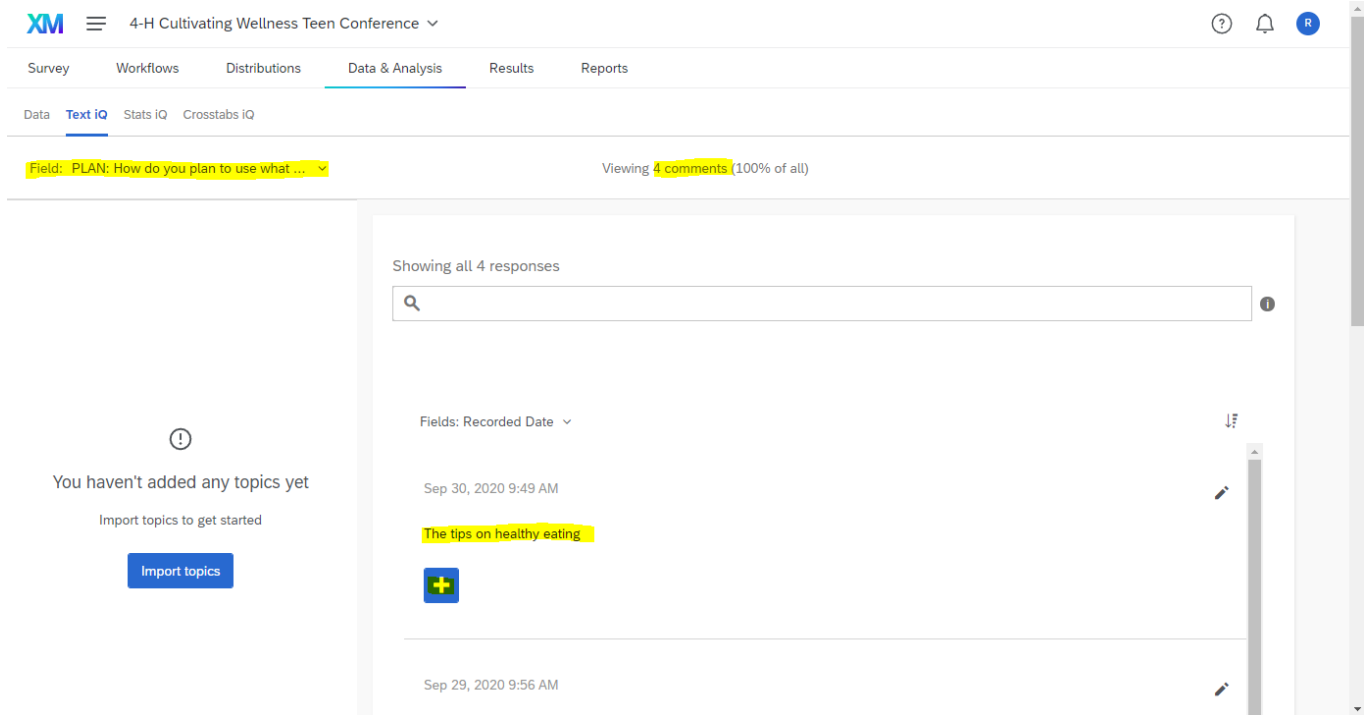
Before you get started, we need to upload your data into Text iQ. If you continue, you won't be able to access your dashboards or data while the update is in progress. While this process usually takes less than 30 minutes, it may take up to 48 hours if there are a lot of comments.

Field name	Number of comments
<input checked="" type="checkbox"/> <b>PLAN:</b> How do you plan to use what you learned at th...	4

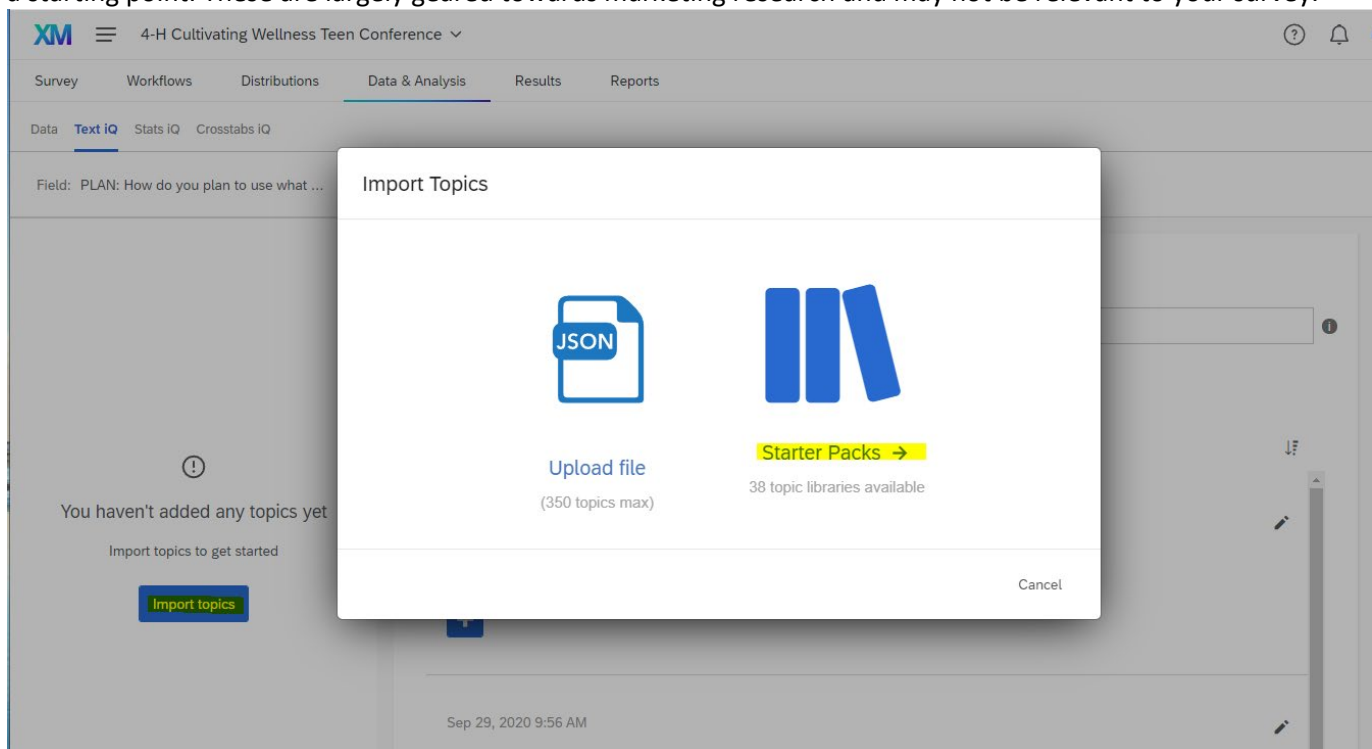
[Upload data >](#)

Qualtrics is now generating new data fields for each of your questions. This can take a few minutes to complete, depending on how many questions you plan to code.

Once Qualtrics completes this process, you'll see a new window. You can see at the top left that you're viewing responses for the PLAN question. By clicking this, you can view a different question to code. There are a total of 4 responses in this survey, each of which is displayed with a '+' which we'll use to add coded values.



If you click on the 'Import topics' button, you'll see that Qualtrics has Starter Packs of coding themes that can be used as a starting point. These are largely geared towards marketing research and may not be relevant to your survey.



You're also able to generate your own topics for coding, which is likely more useful if you're coding evaluation data.

There are multiple approaches to qualitative data coding, some that are more rigorous than others. For more detail about different types of coding, check out this resource – <https://gradcoach.com/qualitative-data-coding-101/>

When evaluating programs, we often ask broad questions about what participants learned, what they appreciated the most about participating, or what they would recommend to improve future programs. Coding these types of responses doesn't require a theoretical framework. Rather, we're often coding for topics like -

- Specific sessions at a conference people liked most
- Whether people learned what was outlined in the objectives of a program
- Logistics of a program people would improve (e.g., room set-up, technology, food, time for discussion, breaks).

To add a topic to a response, simply click the blue + and type the topic. In this example, we've added the topic 'healthy eating.' Make sure you press 'Enter' after adding the coded value to save it.

Sep 30, 2020 9:49 AM

The tips on healthy eating

healthy eating



Once you create a topic, it will be displayed in the menu on the left.

The screenshot shows a user interface with two main sections. On the left, under the heading "All Topics", there is a search bar and a list of topics. Two topics are listed: "educate community" and "healthy eating", both with a yellow highlight and a blue "Unpublished" tag. Below the list is a link that says "Import topics". On the right, there is a list of responses. The first response is dated "Sep 30, 2020 9:49 AM" and has the text "The tips on healthy eating". Below the text, there is a topic tag "healthy eating" with a blue plus sign icon to its right. The second response is dated "Sep 29, 2020 9:56 AM" and has the text "I plan to use what I learned at this conference in my own community to educate the ones around me on food security and mental health." Below the text, there is a topic tag "educate community" with a blue plus sign icon to its right.

If you start typing a topic into a new response, you'll also see your existing topics in a drop-down menu. You can select the topic from the drop-down menu rather than retyping the full topic name each time.

Sep 29, 2020 8:11 AM

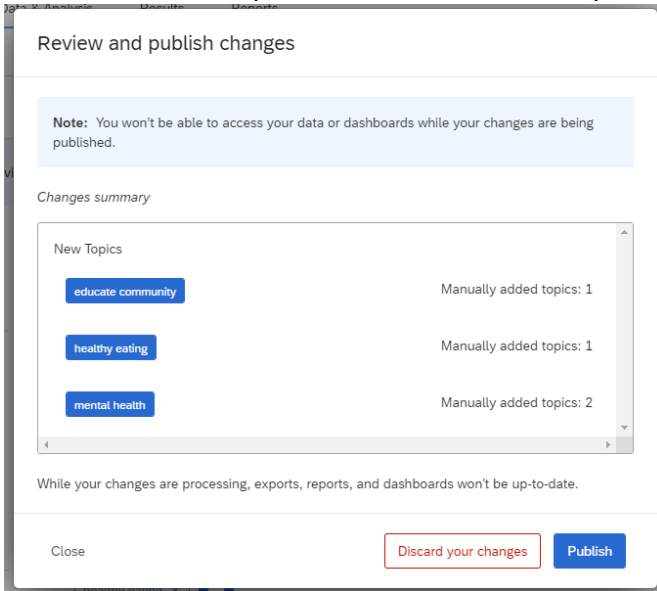
I plan to use what I learned by applying these thing to my everyday life or to help someone when they are struggling mentally.

When you've coded all of your responses, you'll want to click 'Review and publish.'

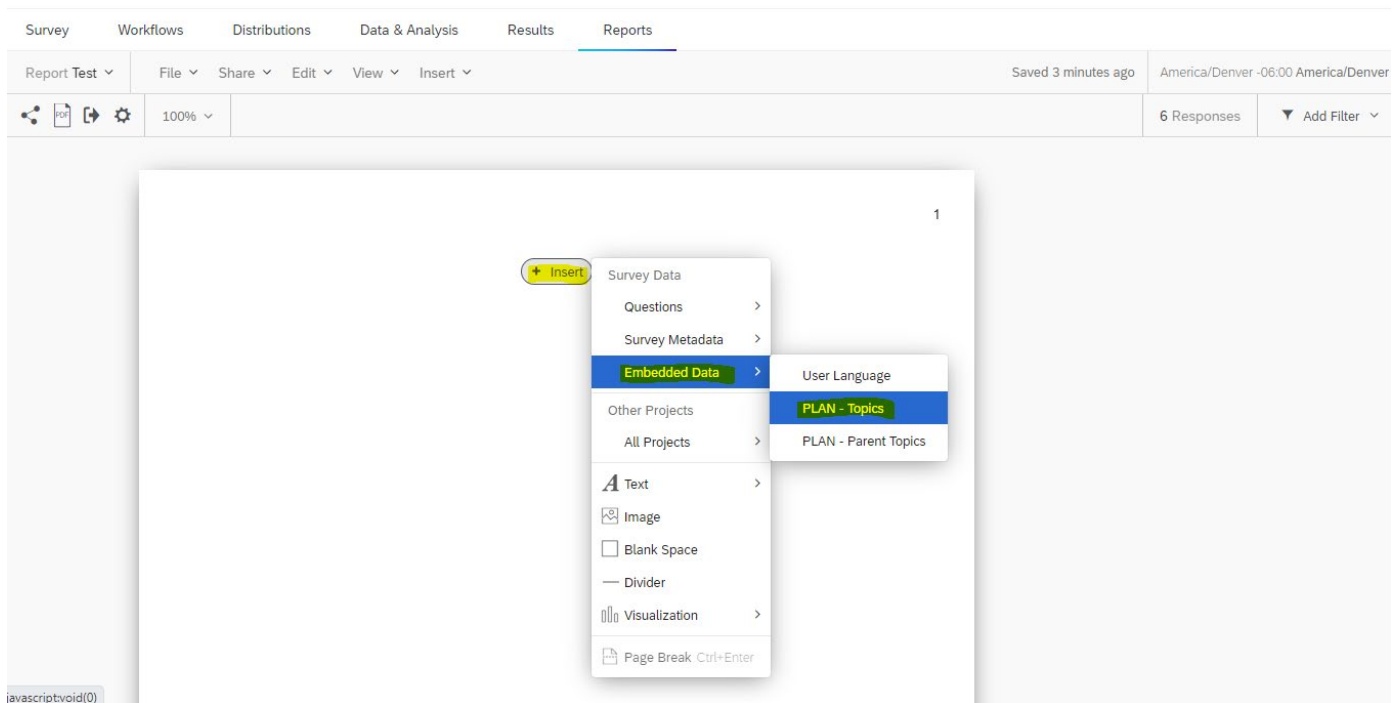
The screenshot shows the XM Data & Analysis interface. At the top, there's a navigation bar with 'Survey', 'Workflows', 'Distributions', 'Data & Analysis' (selected), 'Results', and 'Reports'. Below this, there's a sub-navigation bar with 'Data', 'Text IQ' (selected), 'Stats IQ', and 'Crosstabs IQ'. The main content area shows a field named 'PLAN: How do you plan to use what ...' with 4 comments. A message states: 'Your changes have been saved, but not published. Review and publish your changes to visualize your data, use it in your dashboards, and more.' A yellow 'Review and publish' button is highlighted. On the left, there's a sidebar with 'All Comments' (showing 1 comment with a topic) and 'All Topics' (listing 'educate community', 'healthy eating', and 'mental health', all unpublished). The main response area shows 'Showing all 4 responses' with a search bar, a dropdown for 'Fields: Recorded Date', and a response from 'Sep 30, 2020 9:49 AM' with the text 'The tips on healthy eating'. A topic tag 'healthy eating' is visible at the bottom of the response area.

This will show a new window where you can review the topics you've created and how many responses you've coded with each topic. Click 'Publish' to save your changes.



Now your coded values have been embedded into your data set. This will allow you to use these new coded topics to summarize your open-response data.

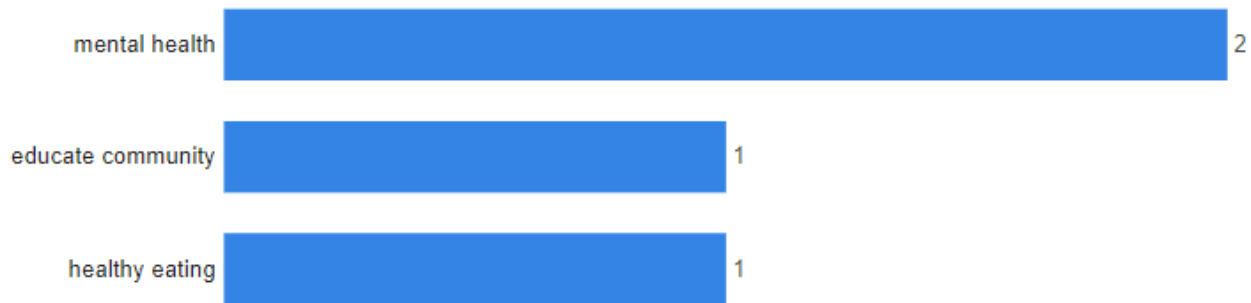
If you're creating a Qualtrics Report of your results, you can include a figure that displays the count of each topic addressed in your open response data. You'll click 'Insert' – 'Embedded Data' – and select the question you want to display (for this example, 'PLAN – Topics').



This will generate a figure that, with a little editing and reformatting, will allow us to display the topics addressed in participants' responses.

### How do you plan to use what you learned?

4 Responses



If you download an Excel file of your data, you'll see that there is now a data column for your coded topics. You can do this by navigating back to 'Data & Analysis' and on the 'Data' screen selecting 'Export & Import' – 'Export Data.' Qualtrics defaults to downloading the data as a CSV file, so you'll want to select 'Excel' on the top menu.

Download a data table

CSV TSV **Excel** XML SPSS Google Drive User-submitted files

### Excel

Export your data as an XLSX file - an Excel-compatible format. If you have a very large number of responses, use TSV instead.

[Learn more](#)

Download all fields

Numeric responses or choice text

Use numeric values

Use choice text

[More options](#)

If you open your Excel file and scroll to the right, you'll see there are now columns for each of the questions you coded and the topics are included as a new piece of data, along with the rest of the survey data. By filtering your data by topic, you can review quotes that were coded with each topic and identify key quotes to include in your reporting. You can also generate figures summarizing the topics in Excel, similar to the one created using Qualtrics Reports.

	R	S	T	U	V	W	X	Y	Z
1	Q2	Q3 How	Q4 How	Q5 This	Q6 I plan to	Q7	PLAN	PLAN - Topics	PLAN - Parent Topics
2	I would recommen nd this event to a friend	much new informati on did you lea	much new informati on did you lea	event inspired me to look for ways to	attend more 4-H events in the future.	I'm already involved in 4-H.	How do you plan to use what you learned at the conference in your own community?	PLAN - Topics	PLAN - Parent Topics
3	YES!	A lot	A lot	YES!	yes	No	The tips on healthy eating I plan to use what I learned by applying	healthy eating	

For a more detailed tutorial on Text iQ developed by Qualtrics, check out <https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/text-iq-functionality/>