

# Engage Analytics

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## Using the Navigation Toolbar

*How do I view consolidate project data? How do I view a specific session?*

- Using the navigation toolbar located above the questions, you can:

The screenshot shows a navigation toolbar with a dropdown menu for 'Customer Service' and a 'Consolidated View' button. The 'Customer Service' dropdown is open, showing options: 'Customer Service', 'Holidays Special', and 'Packaging'. The 'Consolidated View' button is also open, showing options: 'Trends View' and 'Consolidated View'. Below these are two survey entries: '2 CS survey FR 2/6/09 12:30' and '1 CS survey US 2/4/09 12:30'.

Switch between different projects of a program

Select one of the project views: Consolidate view or Trends view

Select to view a specific survey

**Tip:** You can quickly access the project level view, simply by clicking on the upper part of the button.

To learn more: [Watch Video Tutorial](#)

## Understanding Questions' Display

- All questions are displayed in a uniform module which consists of the same controls and capabilities.

The **top bar** shows question's details: Title, Type and number of responses (Hold the bar and drag the entire question to the Key Findings pane)

**Filter** allows you to apply filters to the question data

**Display** allows you to configure your data display

The screenshot shows a question display module for 'Consideration Set (Force Choice - 712 Responses)'. The question is '5 What was the main purpose of your visit today?'. The chart shows four answer choices: 'General browsing', 'Browsing a specific type of product', 'To buy a specific item', and 'To return an item'. The 'To buy a specific item' choice is highlighted with a tooltip showing '63% | 150'. A legend indicates 'Total' (blue) and 'Age, 20-39' (orange).

Quickly add the question to the Key Findings report

Question number and text

Answers and statistics are displayed as charts or in a table in the main area

A tool tip shows the exact percentage and number of responses for a specific answer choice

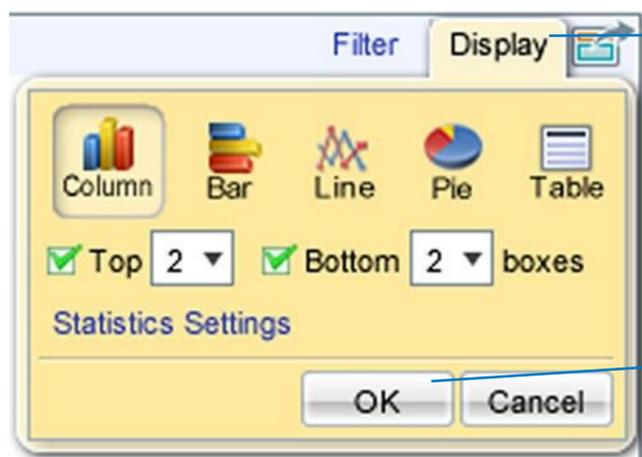
A legend provides additional information

**Tip:** You can switch between view modes by clicking on the zoom in and zoom out arrow buttons or via the view mode buttons located at the lower left corner.

To learn more: [Watch Video Tutorial](#)

## Using the Display Menu

How do I configure a question's display?



- 1 Click on the **Display** button on the top right corner of the question you want to configure
- 2 In the Display window you can:
  - Select the chart type: 
  - Open Ends have additional displays: 
  - Reorder the answers' order – by Rating, by Value, and by Original order
  - Grid and Scale questions allow you to group and consolidate top or bottom answers data
- 3 Click **OK** to close the Display window, and view the resulting changes in the question display



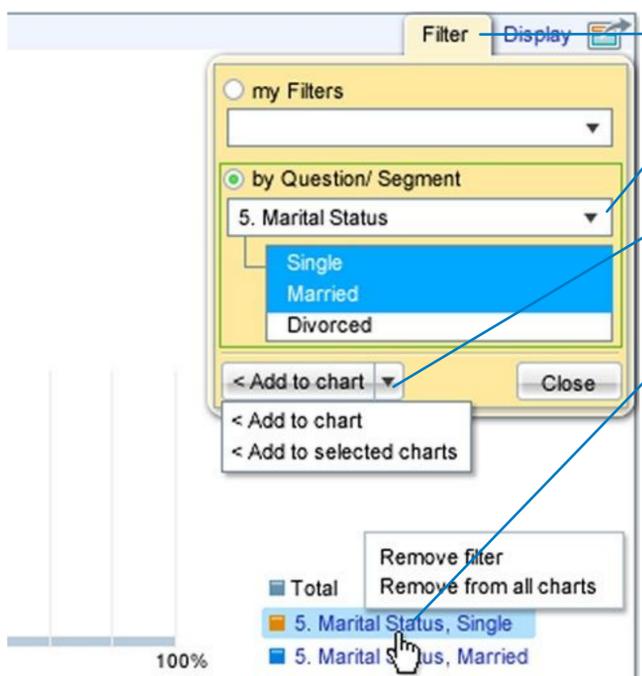
**Tip:** The system stores your personal display configuration. Any changes you make are available whenever you log into the dashboard.



To learn more: [Watch Video Tutorial](#)

## Adding/ Removing Filters

How do I filter a question by another question or a segment?



- 1 Click on the **Filter** button on the top right corner of the question you want to filter
- 2 Select a question or segment from the second dropdown
- 3 Now choose one or more of that question's answers from the list below
- 4 You may either add it as a filter to this question, or to all the questions in the survey
- 5 Click on **Close** to continue
- 6 To remove the filter, simply click on it in the legend
- 7 Select **Remove** or **Remove from all charts**



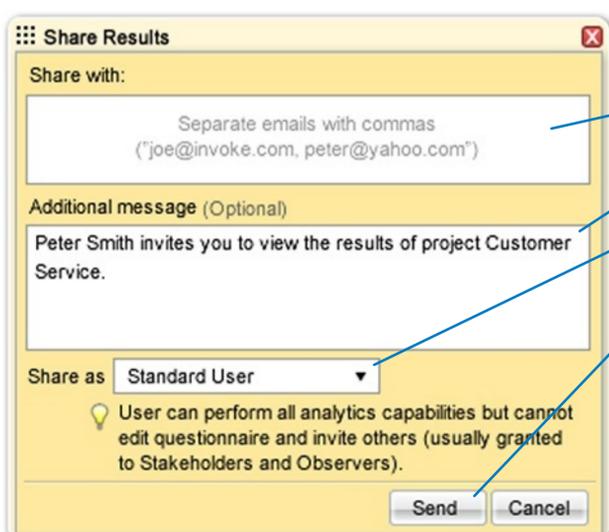
**Tip:** You can re-use a previously defined filter or create a new Advanced Filter from the 'My Filters' drop down menu.



To learn more: [Watch Video Tutorial](#)

## Share Results

How do I let others view the Dashboard?



- 1 Click on the **Share Results** button in the menu bar at the top
- 2 Type or paste-in a list of your invitees email addresses
- 3 Add a personal message, if you'd like
- 4 Grant your invitees with a role from the dropdown to control permissions
- 5 Click on **Send**



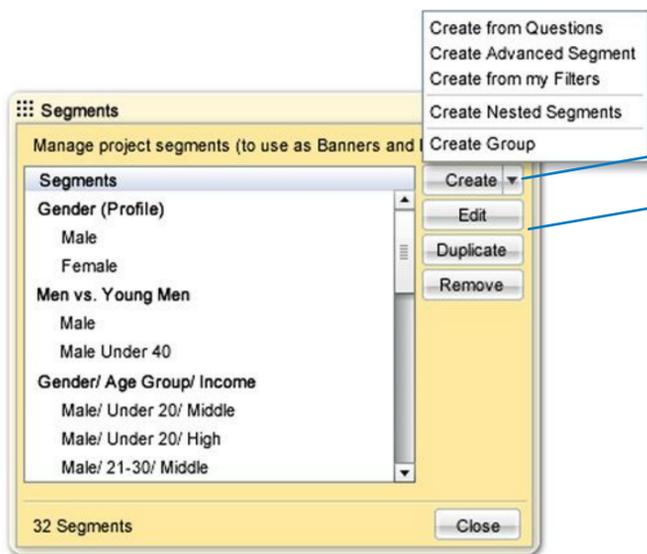
**Tip:** Analytics creates a personal portal that let's you access all the projects that were shared with you. To log into the portal, click on the URL in the email invitation.



To learn more: [Watch Video Tutorial](#)

## Using Segments

How do I define sub-groups of respondents based on specific criteria?



- 1 Click on **Segments** in the menu bar at the top
- 2 In the popup, you can see a list of all segments that have already been defined
- 3 Click on **Create** to open a list of all available ways of creating segments
- 4 You can **Edit**, **Duplicate** or **Remove** any of the created segments

### Create from Questions

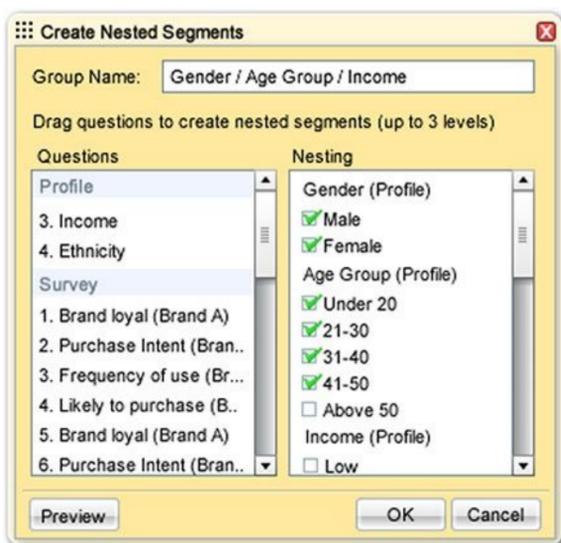
- Creates segments of respondents who answered specific answer choices
- Pick the question from the list on the left
- Mark the required answer choices displayed on the right
- You can repeat this process for all relevant questions
- Clicking **OK** will create a segment for each answer choice selected

### Create Advanced Segment

- Creates a segment using conditional relations between answer choices

### Create Nested Segments

- Creates segments using answers combinations of a selected set of questions
- Drag and drop up to 3 questions to the list on the right, in the order that you want
- Select which answer choices to include
- Click on **Preview** to see the hierarchy defined
- Click **OK** to create nested segments group



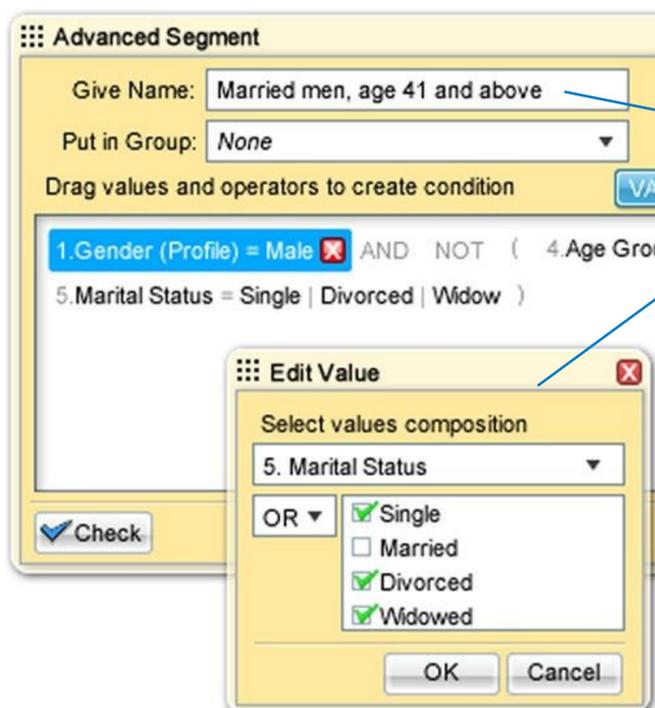
**Tip:** Segments are available for all dashboard users to be used as filters and as banners for the Cross Tabs report.



To learn more: [Watch Video Tutorial](#)

## Using Advanced Filters and Segments

How do I create an advanced condition to filter my data with?



- 1 You can open the expression editor either from the **Create Advanced Filter** option in the Filters menu, or from the **Create Advanced Segment** from the Segments window
- 2 Name your expression
- 3 Now, drag and drop **VALUE** to the edit box
- 4 In the pop up, pick the required data using the questions and answers lists and click **OK**
- 5 Now, drag and drop **( )** **AND** **OR** **NOT** operators
  - Add more values and operators to complete the logical expression
  - To remove a Value or an Operator from the condition, roll over it and click on the **X**
- 6 Click **Done** to validate the logical expression and add it to the list of filters or segments



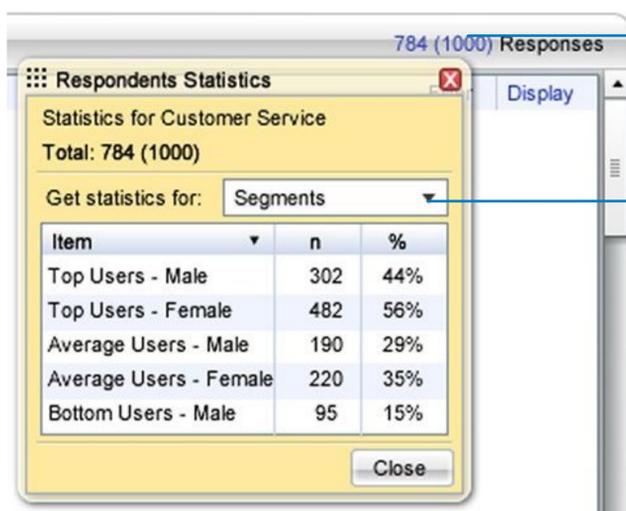
**Tip:** To edit a Value click it and select new data in the pop up window. To edit the expression simply drag and drop expression's elements to move them around.



To learn more: [Watch Video Tutorial](#)

## Segments Info

### How do I track my Segments?



- 1 Click on the **Respondents Count** label located on the bar at the top
- 2 In the popup, you can see a list of all segments defined
- 3 Count and Percentage statistics are provided for each segment
- 4 You can select to view other questions' statistics using the dropdown menu located above the table



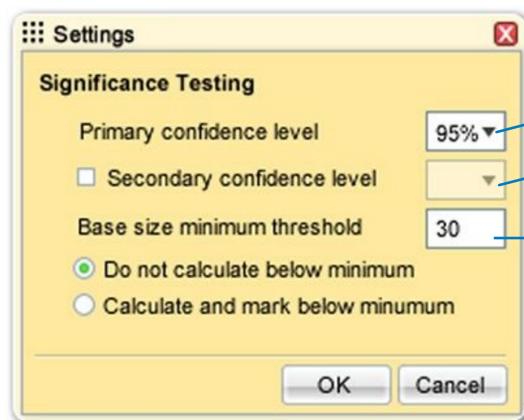
**Tip:** To view the aggregated segments statistics from all sessions, you can open the respondents count window from the project's consolidated view.



To learn more: [Watch Video Tutorial](#)

## Running Statistical Significance Testing

### How do I configure and run statistical significance tests on questions?



- 1 To configure significance tests, click on **Settings** in the menu bar at the top
- 2 In the popup, select the primary confidence level using the dropdown
- 3 To run another test using a secondary confidence level, mark the checkbox and select the value using the dropdown
- 4 You can also determine how to handle tests on a small base size

#### Dashboard Display

- To activate tests on a specific table or chart, click on the **Display** button for that question
- Click on **Statistics Settings**
- In the popup window enable **Significance Testing**
- Click **OK** and close both windows
- Statistical Significance indications are marked in tables' cells and in charts
- Move the cursor over the significance test results to see which tests ran

#### Cross Tabs Report

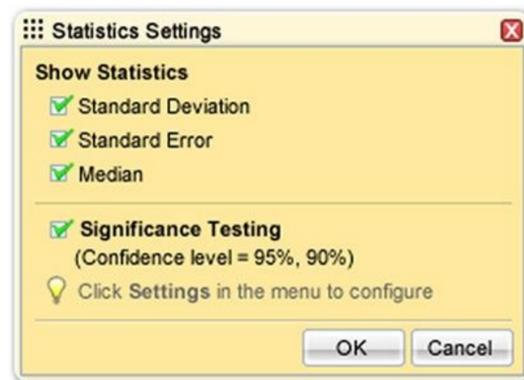
- To activate statistical significance tests in the Cross Tabs report, Click on **Save Cross Tabs** in the menu bar at the top
- In the popup select the segments you want to use as banners
- Click on **Statistics Settings** located at the top right corner of
- In the popup enable **Significance Testing**
- Click **OK** and close window
- Click **Done** to generate and save the



**Tip:** In the Cross Tabs report, Analytics will run statistical tests only within groups; therefore cells of banners across groups will not be compared.



To learn more: [Watch Video Tutorial](#)



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Filter Display

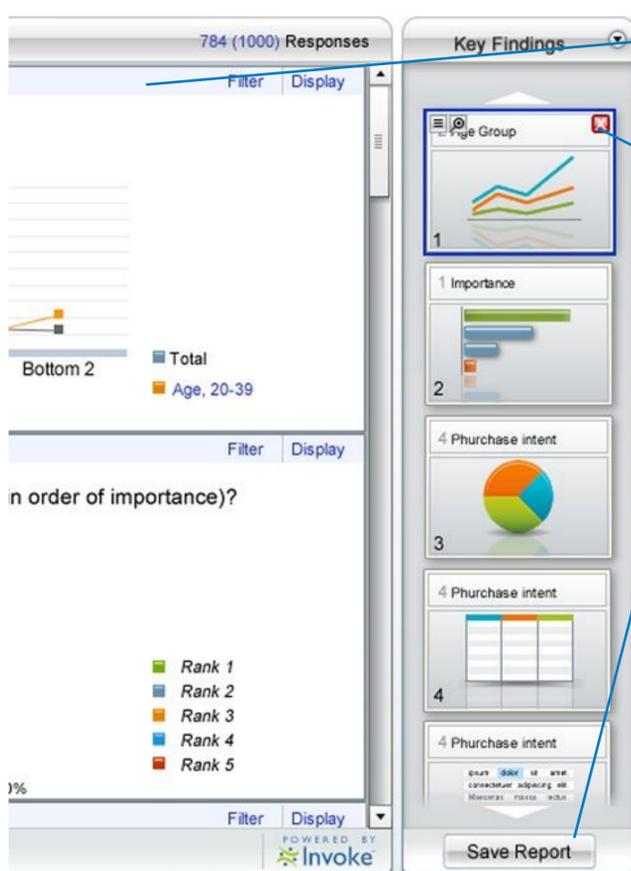
	35-44	Age, 45+	Gender, Male	
(B) Significantly different (Z-Test) with (A) Age, Under 35 and (c) Age, 45+			(D)	%
	57%	24	32%	31
				30%
	21	9	13%	25
		2.08		1.91
	100%	195	100%	195
				100%

Significance Testing

- Total
- (A) Age, Under 35
- (B) Age, 35-44
- (C) Age, 45+
- (D) Gender, Male

## Using the Key Findings Pane

How do I add slides to my PowerPoint™ presentation?



- 1 Drag the selected question from the question display to the Key Findings pane on the right  
Or simply click the 'add slide' icon  of the question you want to add
- 2 A slide is added to the report and a slide thumbnail is displayed in your Key Findings pane
- 3 To remove a slide, click on the  button, that appears when you move the cursor over the slide thumbnail
- 4 Click on  at the bottom to save your PowerPoint™ Report



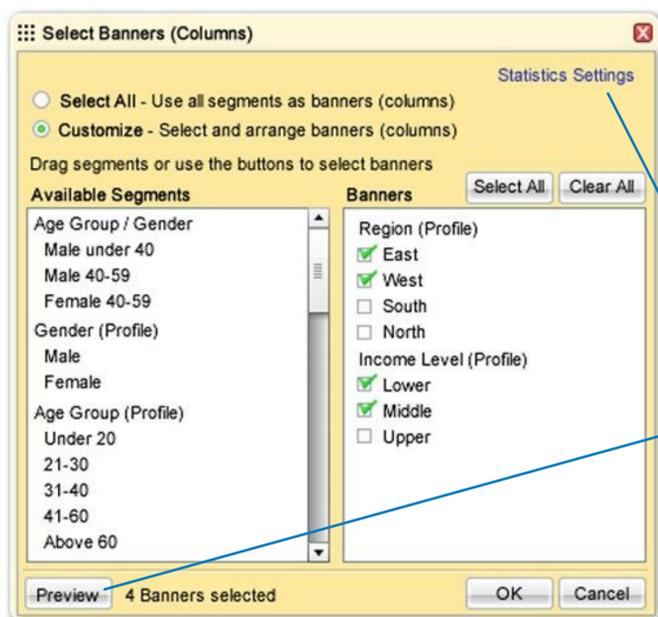
**Tip:** You can prepare the report template while the survey is still fielded, and each time you save the report, the latest dataset will be used.



To learn more: [Watch Video Tutorial](#)

## Cross Tabs Report

How do I save cross tabs data in excel format?



- 1 Click on  in the menu bar at the top
- 2 Pick **Select All** to use all segments as banners
- 3 Pick **Customize** to configure you own report
  - Drag groups of segments to the list on the right to include them in the report
  - Within each group select which segments to include
  - You can drag groups to arrange the order of banners in the report
- 4 Click on  to customize the statistics calculated in the report
- 5 Click on  to see how the selected columns are arranged
- 6 Click on  and select where to locally save the report



**Tip:** Cross Tabs report contains all project-level data. All closed ended questions are tabulated. All open ends are shown in separate tabs; one per session.



To learn more: [Watch Video Tutorial](#)