QUALTRICS

AN INTRODUCTION

West Virginia University
INFORMATION TECHNOLOGY SERVICES

TABLE OF CONTENTS

QUALTRICS WORKFLOW

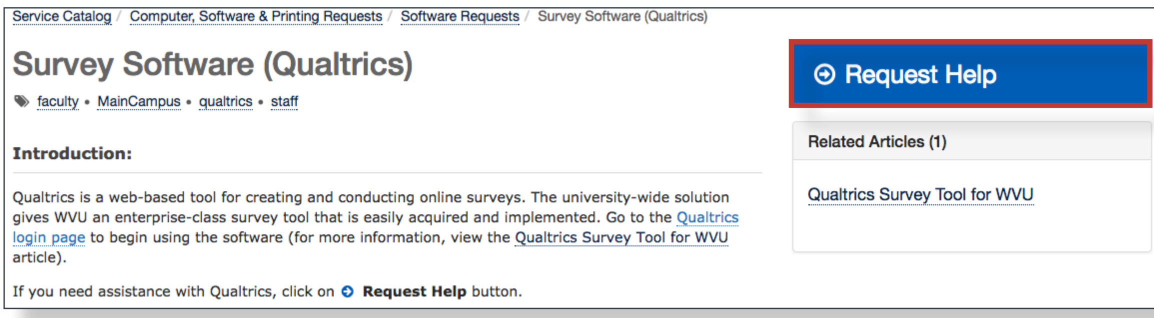
QUALTRICS SUPPORT

WVU Support

If you have questions about using Qualtrics, or need assistance with your account, visit the **Survey Software (Qualtrics)** service page and fill out the request form.

If you would like more information about getting a WVU Qualtrics account, visit the **Qualtrics Survey Tool for WVU** article.

To find all help articles and service pages, go to **it.wvu.edu/help**. To contact the ITS Service Desk, call (304) 293-4444 or email them at **ITSHelp@mail.wvu.edu**.

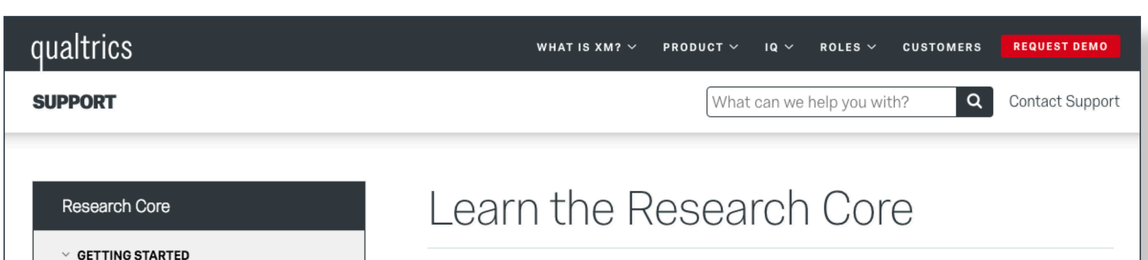


Qualtrics Support

If you encounter technical difficulties after WVU business hours or you need advanced assistance, you can contact Qualtrics support directly.

Qualtrics Support
Monday-Friday 9 a.m.-8 p.m.
support@qualtrics.com
800-340-9194

You can also visit the **Qualtrics Support** website to view helpful articles on actions and functions of the Research Core license we use at WVU. The links and information found in this guide are supported by Qualtrics Support articles.



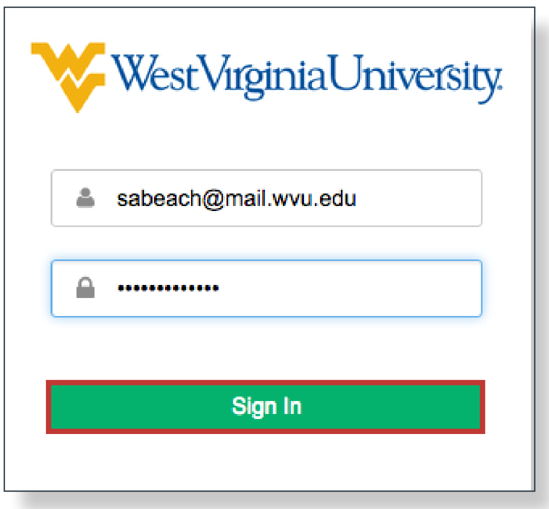
OVERVIEW

Qualtrics is a solution for connecting data and driving outcomes. It can be used to create online forms, questionnaires, surveys and even tests. Although it's similar to other online survey building tools such as Wufoo and Survey Monkey, it has much more powerful capabilities.

Walk through these steps to build, customize, distribute and analyze a project. If you would like to check out additional resources, go to **qualtrics.com/support**.

SIGN IN AND CREATE PROJECT

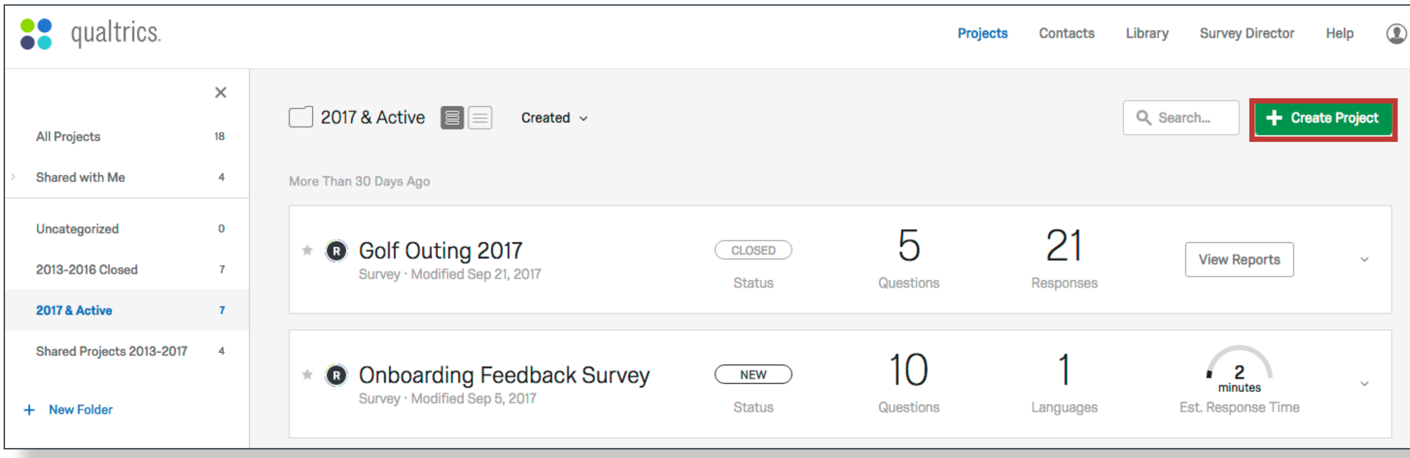
Go to **wvu.qualtrics.com** and sign in using your WVU Login credentials.



If you've never signed in to Qualtrics before, you will receive a message saying,
"This seems to be the first time you are logging in to Qualtrics." Select the **I don't have a Qualtrics account** button and accept the user agreement.

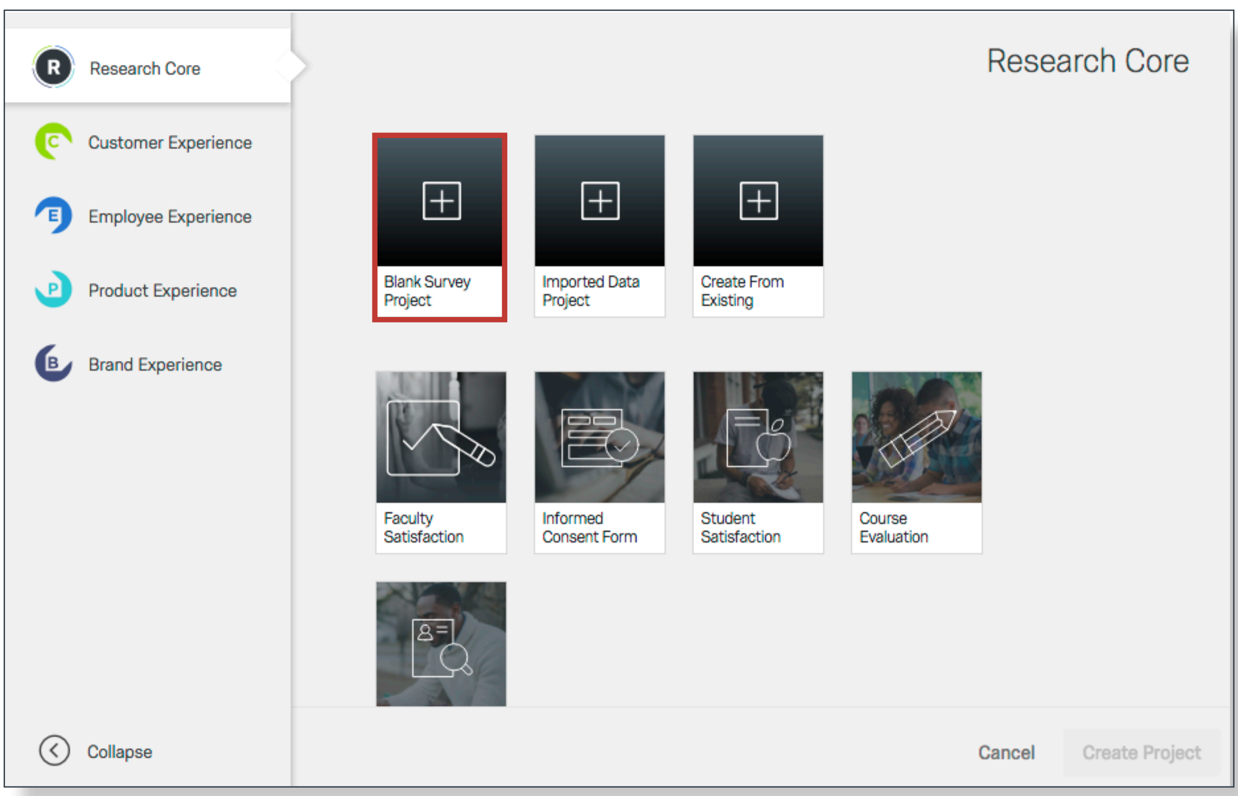
When you first log into your account, you'll see the *My Projects* landing page. This page lists all of the projects you've created, and gives you the option to create a new project.

1. To create a new project, click the green **Create Project** button.

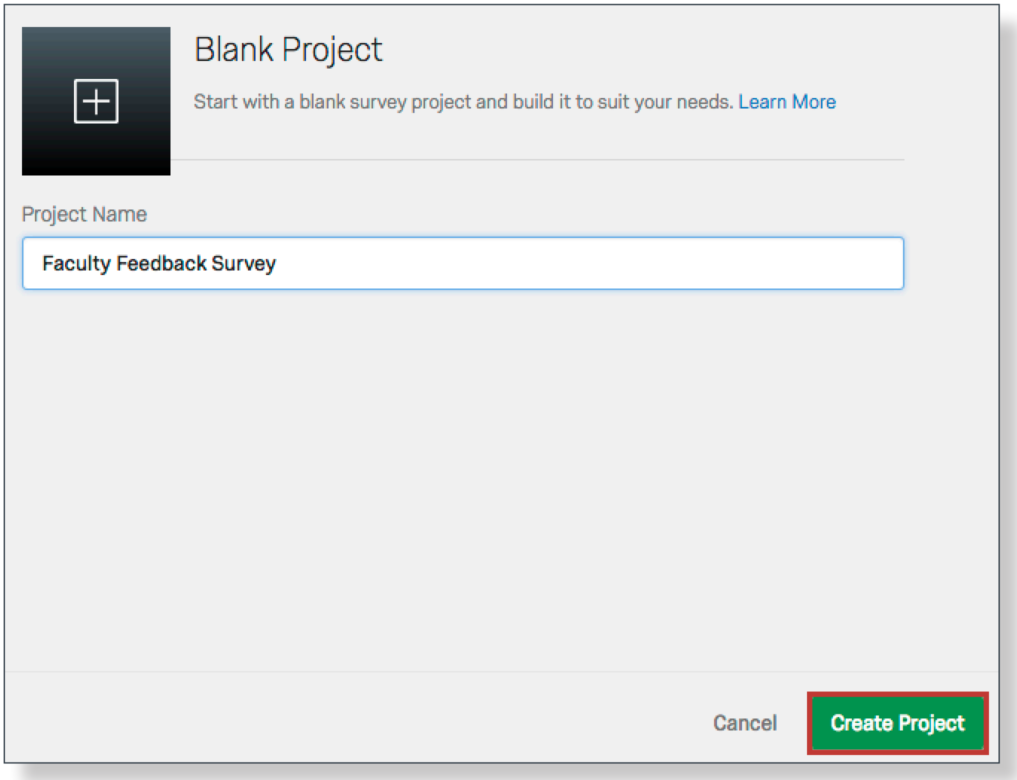


Under the Research Core license, you have the option to choose Blank Survey Project (start from scratch), an Imported Data Project (import data from a file) or Create From Existing (create a new project from an existing Qualtrics project).

2. Most of the time, you will choose **Blank Survey Project**.

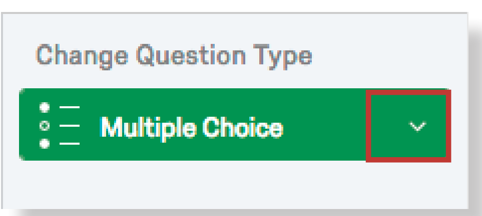


3. Name your project and click the green **Create Project** button.



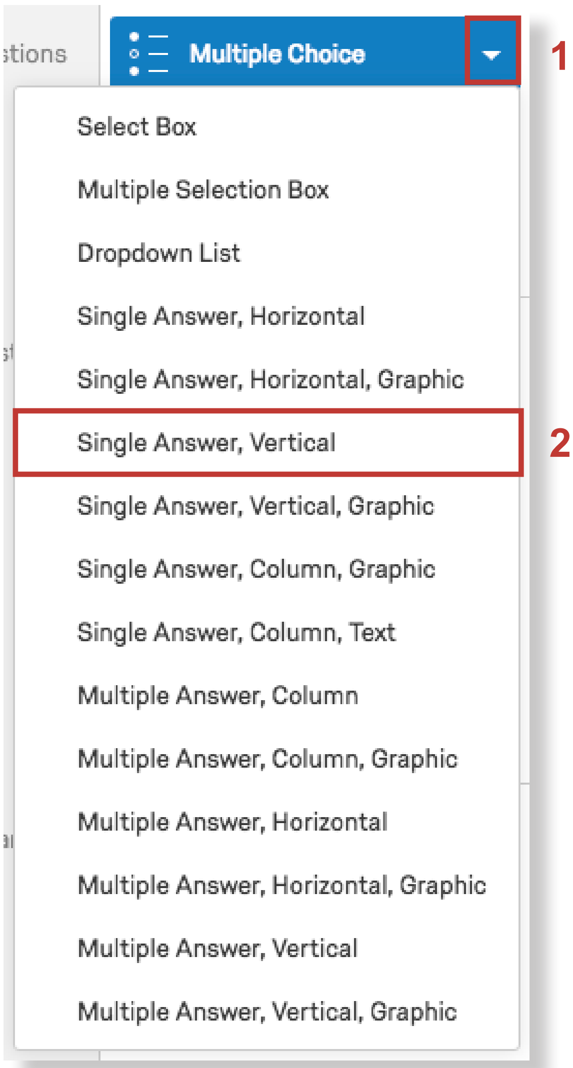
CHOOSE QUESTION TYPE

1. Once you've created a new project, you will see a blank question/answer set already added for you. The default question type is multiple choice, as that's the most popular question type to use. To change the question type, make sure the default question is selected, and click on the drop-down arrow next to the Multiple Choice question type in the editing pane.



2. Qualtrics provides over 100 different ways to ask a question. Within each question type, there are variations to choose from. They can be found by selecting the drop-down arrow next to a question type. To see examples of the variations, hover your mouse over them. To choose a question type variation, select it.

Note: You can change the question type of any question at any time during the building/editing process.



POPULAR QUESTION TYPES, EXPLAINED

• Multiple Choice

This question type allows the respondent to choose one or more answers from a list. For Multiple Choice questions, you can increase the number of choices, change the way answers are displayed, adjust the position of the answers on the screen, and more.

• Descriptive Text or Graphic

This type is great for including an introduction or instructions in your survey. Though they're called "questions," they don't actually have any answer choice options, so only text and graphics are displayed to the survey participants.

• Matrix Table

Matrix Table questions allow you to collect a little more information in one question than is possible with a traditional Multiple Choice question. You can condense similar questions into one, with many variations. The most common variation is the Likert scale, but others like Bipolar and MaxDiff are available in the Editing Pane.

• Text Entry

Text Entry questions allow you to ask participants for open-ended text feedback. Under Text Type in the Editing Pane, you can change the size of the text box, depending how long of an answer you want. Additionally, in the Validation Type area, you can set a character limit.

• Rank Order

Rank Order is used to determine each respondent's order of preference for a list of items.

• Slider

Sliders let respondents indicate their level of preference with a draggable bar, rather than a traditional button or checkbox.

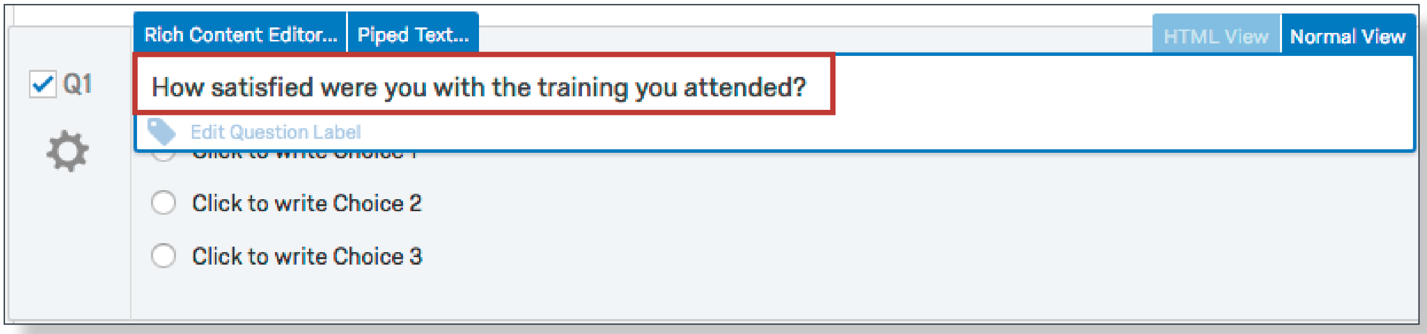
• Side by Side

Side by Side questions let you ask multiple questions in one condensed table and provides an effective way of shortening your survey while gathering the same amount of data.

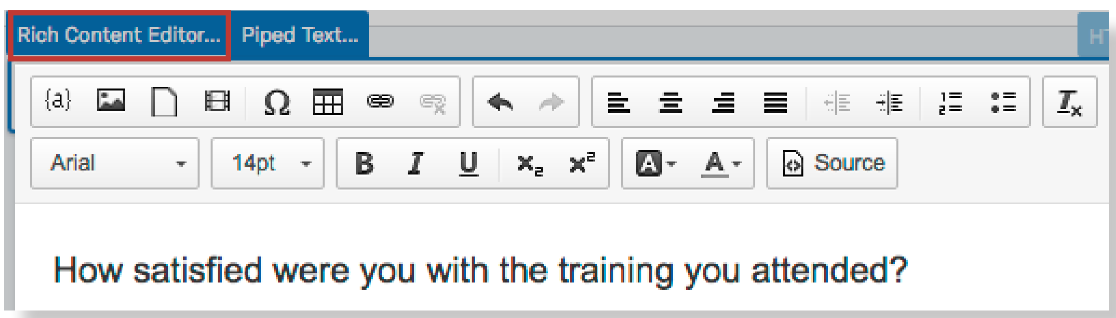
For more information, visit the **Question Types** Qualtrics support article.

ENTER QUESTION AND ANSWER TEXT

1. To enter your question in the default question style, click inside the question box and type your question.

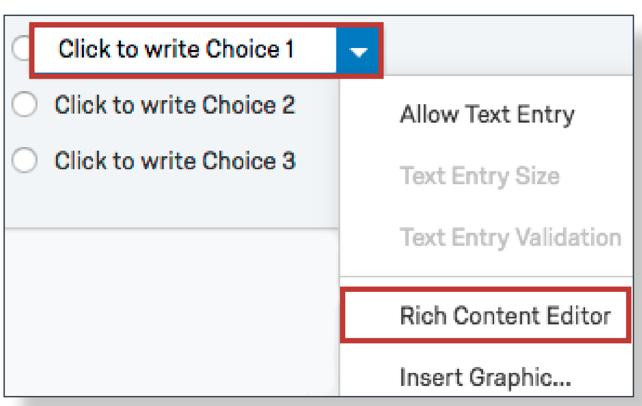


2. To change the font, font size or orientation of the question text, click **Rich Content Editor**. The editor also allows you to upload an image or video to the question.



3. To enter text for an answer choice, click inside the first choice box and enter your answer. To change the number of answer choices, click the **plus or minus symbols** under the *Choices* section in the question editing pane.

4. To change the font or font size of an answer choice text, click on the **drop-down arrow** next to the selected answer choice, and choose **Rich Content Editor** from the list.



ADD, DELETE OR MOVE A QUESTION

• To add a question anywhere in your in your survey, click a **green plus sign** to place the new question either above or below the question you've selected.

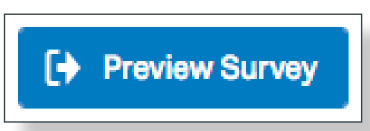
• To delete a question anywhere in your survey, select the question and click the **red minus sign**.

• To move a question above or below another question, click the **grey up or down arrow** on the left side of the question.

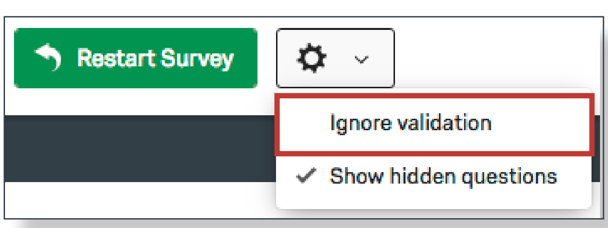
To learn more, visit the **Creating Questions** Qualtrics support article.

PREVIEW A SURVEY

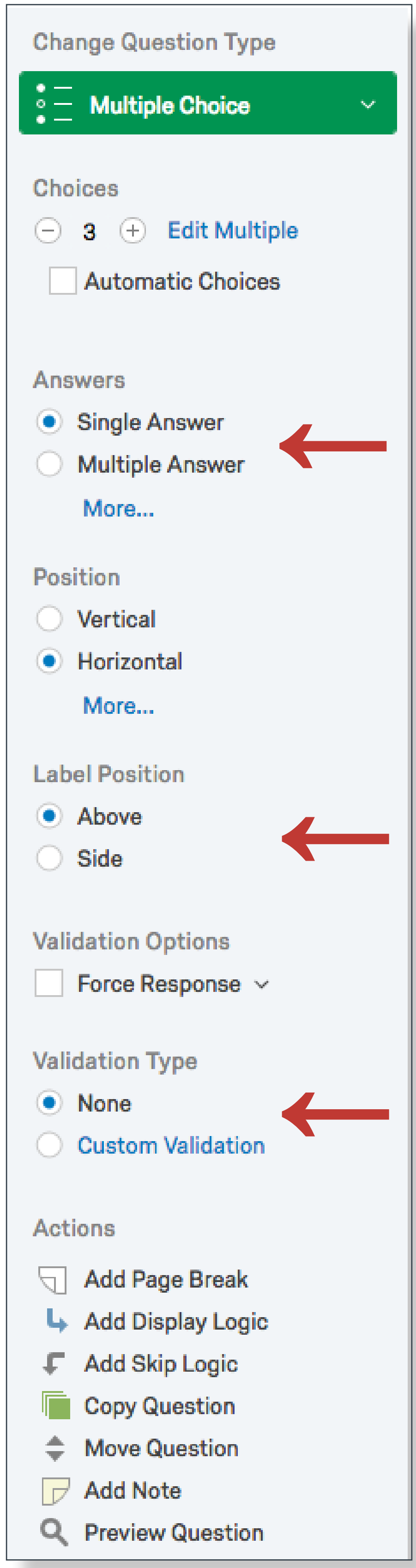
From the *Survey* tab, click the blue **Preview Survey** button to view how respondents will see the survey on their computers and phones. The survey will open in a new window. You can share the preview link with collaborators, to get feedback before the survey goes live.



If you've selected *Force Response* or *Request Response* validation on a question, it can make previewing your survey tedious. To remediate this, you can ignore validation in preview settings. Click on the **settings drop-down menu** at the top of the preview page. Then, select **Ignore validation**.



QUESTION EDITING PANE



Change question type

Change number of answer choices per question

Change answer type

Change position of how answer choices are displayed

Change position of answer choice text. *This only appears for certain question types*

Check this box if you don't want respondents to be able to skip the question.

A custom validation allows you to set certain conditions per question. Participants must meet requirements before moving on to the next question.

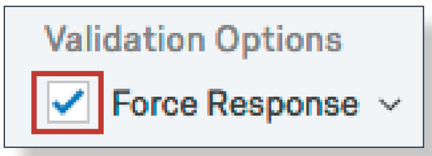
Additional options (see page 13)

QUESTION VALIDATION OPTIONS

You can use validation to force respondents to answer a question, or request that they consider answering the question before leaving the page. These options can also be used to force a certain type of response. To learn more, view the **Validation** Qualtrics support article.

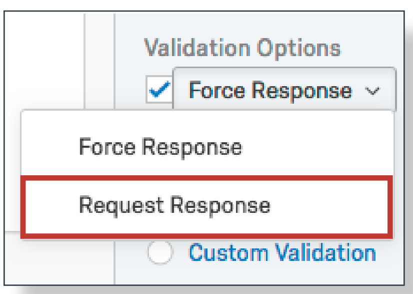
- **Force Response**

This option requires respondents to answer the question before they can progress to the next page of the survey. If they try to progress without answering the question, they will see a message letting them know they must answer the question to proceed. To enable Force Response validation, select the question, then select the **box** for *Force Response* in the Question Editing Pane.



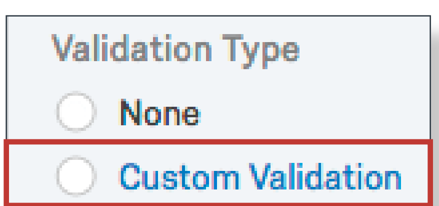
- **Request Response**

Request Response allows you to remind respondents that they missed a question without requiring that they go back and answer it. When Request Response is selected, and a respondent skips the question, Qualtrics will ask if the respondent would like to go back and answer the skipped question before they move on. To enable Request Response validation, click on the **drop-down arrow** next to *Force Response* and select **Request Response**.



- **Custom Validation**

Sometimes, you'll want to not only force respondents to answer a question, but also require that they answer it a certain way. You can use Custom Validation to build your own validation criteria.

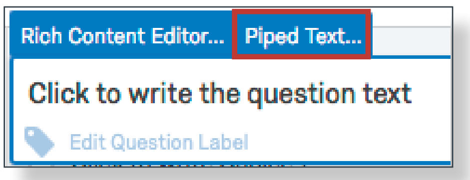


PIPED TEXT

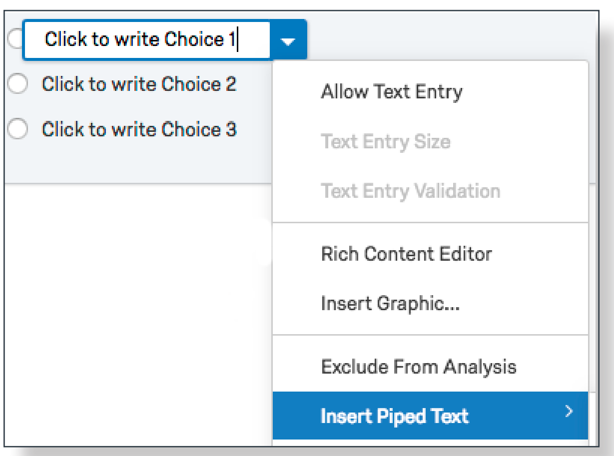
With Piped Text, you can customize question and answer choice wording for each respondent, allowing each of them to have a customized, dynamic and personal survey experience. Piped Text is a line of code you add to your survey that pulls information from different sources and displays that information to the respondent. Though Piped Text appears as a line of code in your survey editor, when respondents take the survey, this code will be replaced with the specified content.

Piped Text is generated using the Piped Text menu. This menu is found in many different places throughout Qualtrics. See the examples below.

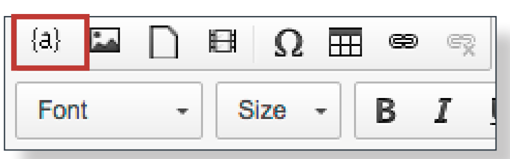
In the Question Editor



In the Answer Choice Drop-Down Menu

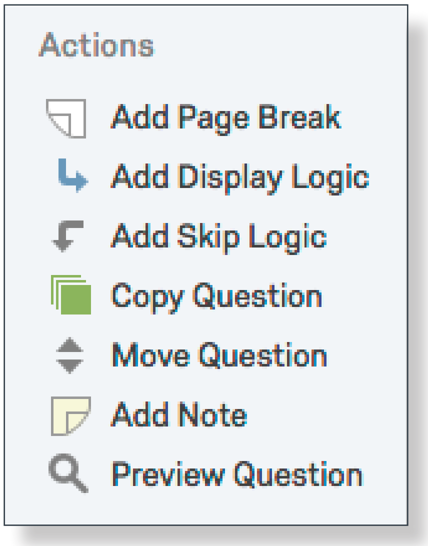


In the Rich Content Editor



To learn more, view the instructions under the *Generating Piped Text* section from the **Piped Text** Qualtrics support article.

QUESTION ACTIONS



• Add Page Break

If you don't want all of your questions to appear on the same page, you can insert a page break. To do so, select a question and click **Add Page Break**. A page break will be inserted immediately beneath the selected question.

• Add Display Logic

Create logic that determines the conditions for which your question will be displayed. This way, respondents will only see questions or answer choices relevant to them.

• Add Skip Logic

Similarly to Display Logic, Skip Logic skips respondents ahead to another point in the survey, depending on how they answer the question.

• Copy/Move Question

Select a question and click **Copy Question** to duplicate it and display it as the next question. Select a question and click **Move Question**, then select the area to which you want it to move.

• Add Note

Any notes you add to a question are visible only to you and other users you've shared the survey with. Select the question and click **Add Note**. Then, type your note into the field.

• Preview Question

Select a question and click **Preview Question** to see what it will look like to respondents.

SET CONDITIONS FOR AN ACTION (USE LOGIC)

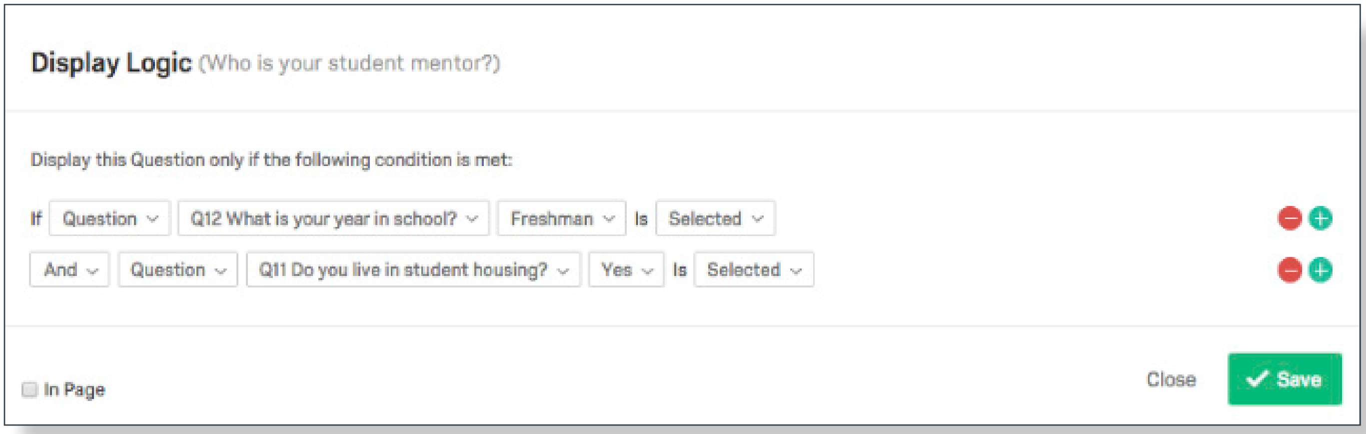
“Logic” refers to features in Qualtrics where you set conditions for an action. Each of the following Qualtrics features uses logic is some way. To view more about a type of logic, click on the associate link.

- **Branch Logic**: shows a block of questions conditionally
- **Display Logic:** shows a single question conditionally
- **Email Triggers:** conditionally sends an email upon survey completion
- **Contact List Triggers:** conditionally adds a respondent to a contact list upon survey completion
- **Quotas:** determines the maximum number of responses that should be accepted and recorded
- **Custom Validation:** requires respondents to meet certain requirements before proceeding

Whenever you are presented with a logic window in Qualtrics (such Display Logic or Branch Logic), you will see a series of drop-down menus. These menus determine the condition parameters. Each menu specifies the logic condition further until you have a full statement.

Sometimes the logic you want to create requires multiple conditions. These multiple conditions can be connected with an AND conjunction or with an OR conjunction. Conditions linked by AND are evaluated first, followed by conditions linked by OR.

Example of Display Logic with multiple conditions

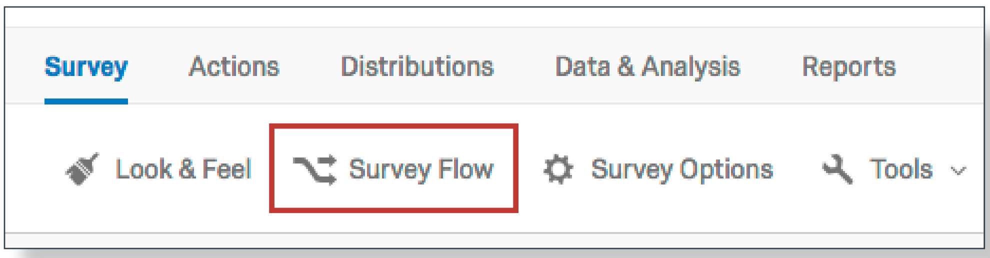


EMBEDDED DATA

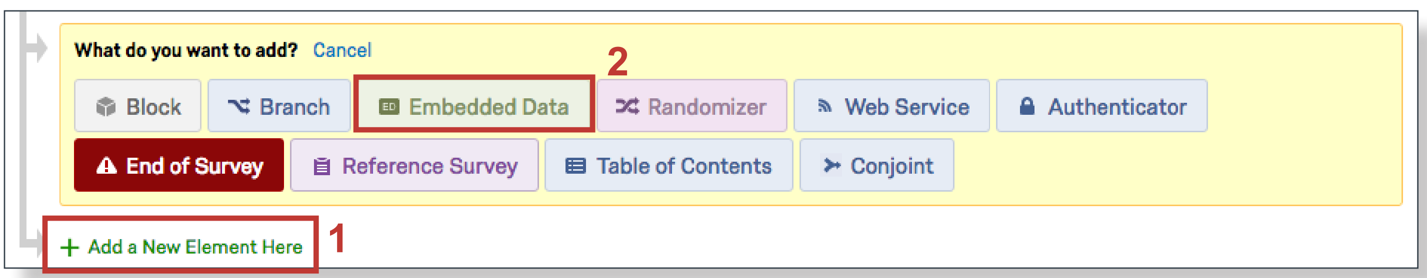
If you would like to gather background information about your survey participants without actually posing a question to them (e.g. gathering their WVU email address), you can use embedded data.

Embedded Data is any extra information you would like recorded in addition to the question responses. It can be used to store information such as the condition a respondent was assigned to in a research study, and previously gathered information from a contact list. To learn more, visit the **Embedded Data** Qualtrics support article.

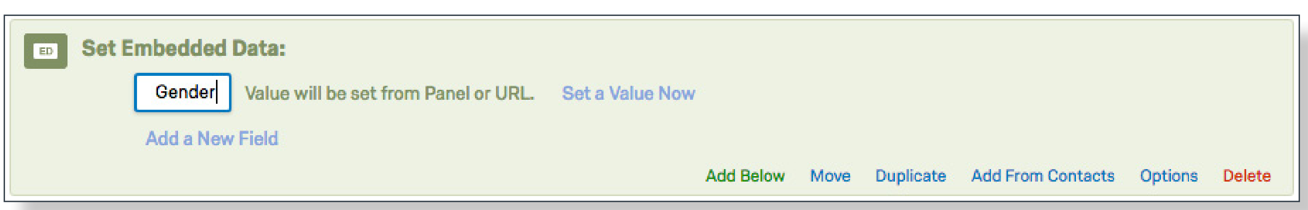
1. To create an embedded data element, open your survey and select **Survey Flow** from the Survey tab.



2. Click **Add a New Element Here** and select **Embedded Data**.



3. Click **Enter Embedded Data Field Name Here** and enter the field name (e.g. Gender, State, Status, Email)

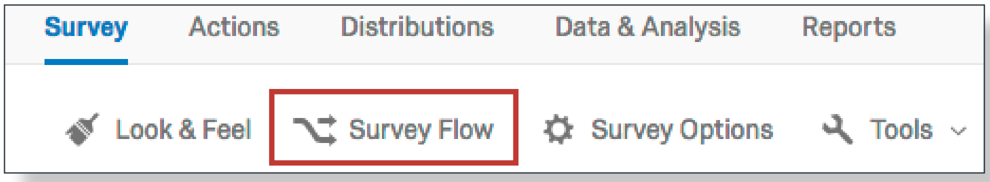


4. If needed, click **Set A Value Now** to set a value for a field, or click **Add a New Field** to add multiple fields to the element.

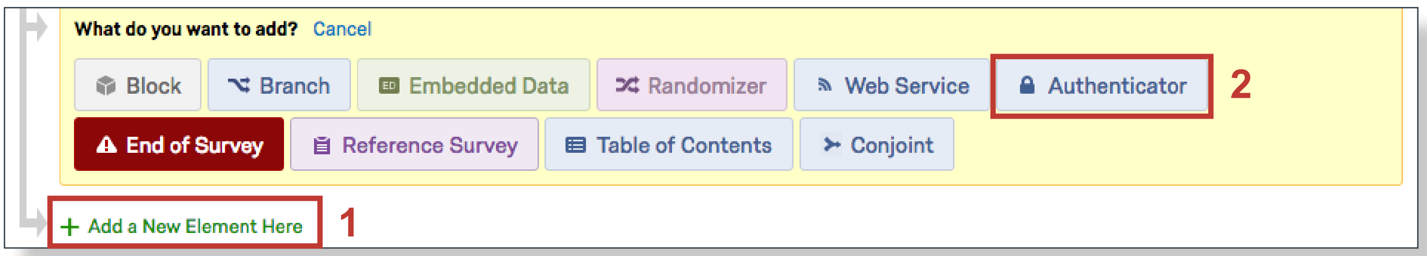
ADD WVU LOGIN AUTHENTICATION

To force your survey respondents to login with their WVU Login credentials in order to access and complete the survey, refer to the instructions below.

1. Open your survey and select **Survey Flow** from the Survey tab.



2. Click **Add a New Element Here**. Then, click the **Authenticator** button.

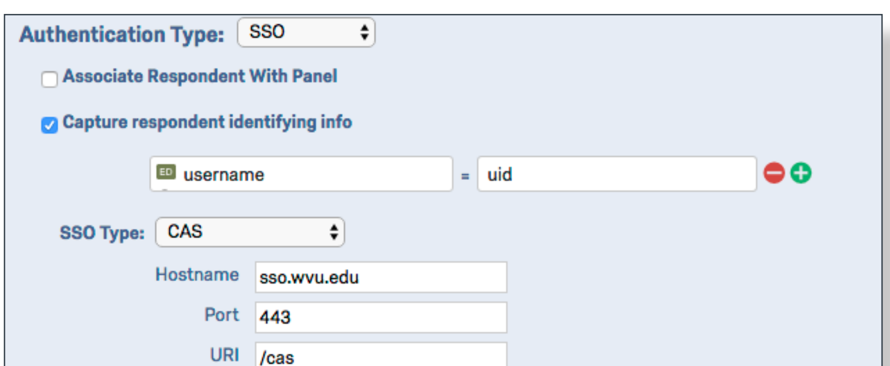


3. In the Authentication Branch;

a. select **SSO** next to *Authentication Type*.
b. Uncheck the *Associate Respondent with Panel* box if you're not using a panel.
c. Check the **Capture respondent identifying info** box and type **username** (or any other variable name) in the Embedded Data field and **uid** in the SSO field.
d. Select **CAS** next to *SSO Type*. Enter **sso.wvu.edu** in the *Hostname* field, **443** in the *Port* field and **/cas** in the *URI* field.

4. Click the green **Save Flow** button in the bottom-right corner when finished.

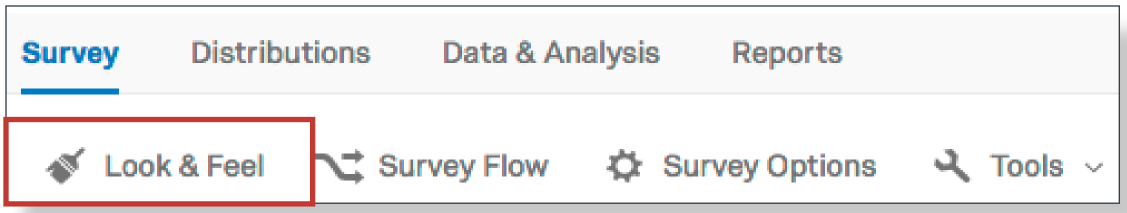
Note: Testing the CAS connection should result in an error message. Once Authentication is active, the survey will no longer be able to be previewed. To view the survey it must first be activated.

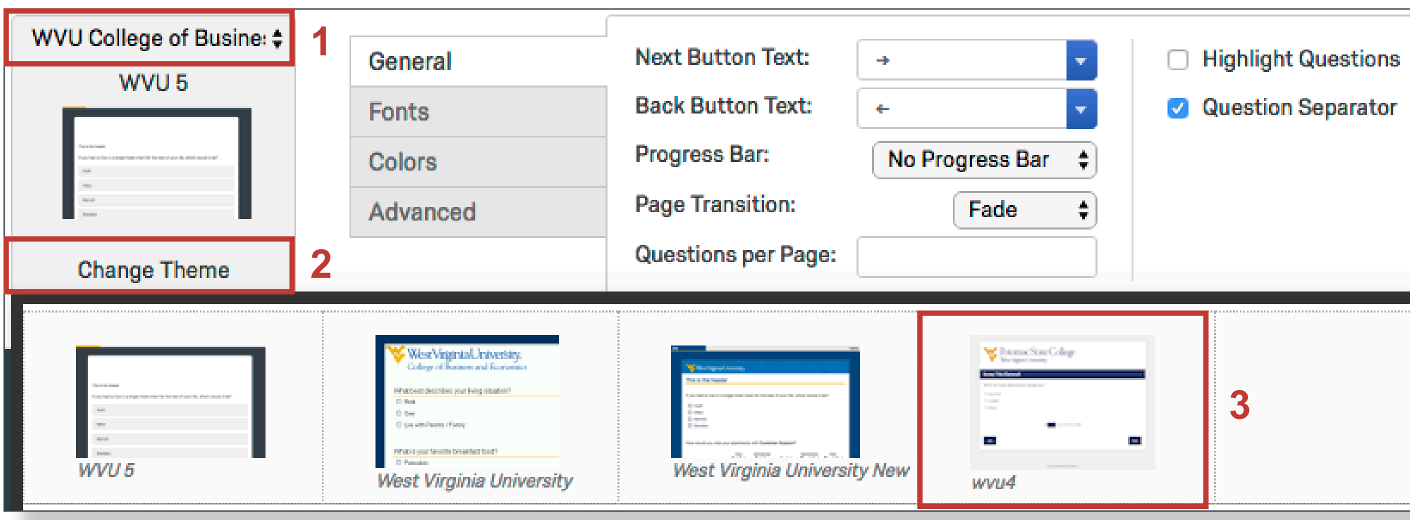


LOOK & FEEL MENU

The Look & Feel menu is located under the *Survey* tab. It allows you to customize visual elements of your project, choose a design theme and more. As a WVU employee, you should use a WVU branded survey theme, instead of a built-in Qualtrics theme.

1. To choose a new theme, make sure **WVU College of Business and Economics** is selected (anyone at WVU can use this series of themes), and click **Change Theme**. Then, select one of **WVU themes**. Click the **Save** button at the bottom when making any changes.





Under the *General* section of the Look & Feel menu, you can also change the text that appears on top of the next and back buttons, enter the allotment of questions per page and more.

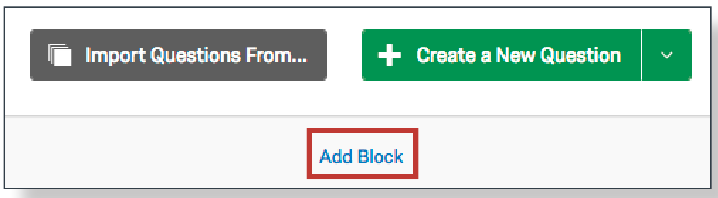
Under the *Advanced* section, you can enter text to be displayed as the header or footer on your project, or enter custom CSS. This is useful for adding your specific department or college's logo.

To learn more, visit the **Look & Feel** Qualtrics support article.

QUESTION BLOCKS

Blocks are sets of questions within your survey. Typically, questions are separated into blocks for the purpose of conditionally displaying an entire block of questions, or for randomly presenting entire blocks of questions. Blocks can also be used to organize longer surveys. Respondents won't see these block titles, but adding a description that they will see is easy. Simply add a Descriptive Text question as the first question in your block. This is found in the question types menu.

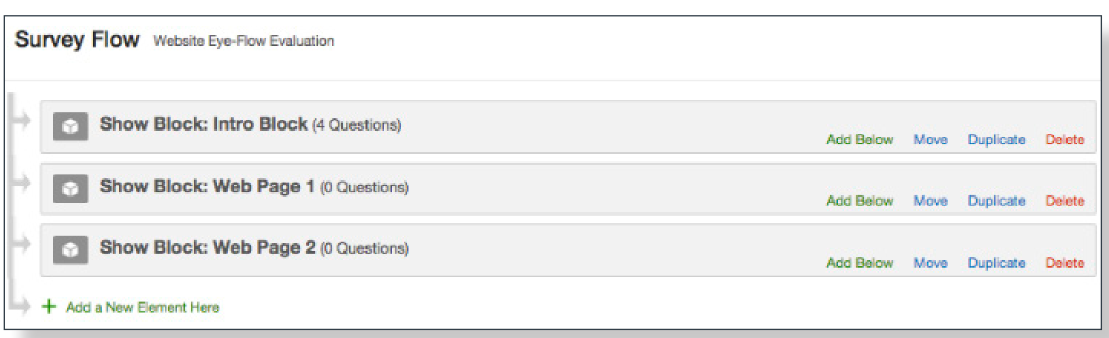
When you first create your survey, you'll notice it already includes one block (named "Default Question Block"). If you need another question block, simply click **Add Block** (it is located beneath every block). For more information, visit the **Block Options** Qualtrics support article.



SURVEY FLOW

Survey Flow, found under the *Survey* tab, is a block-level view of your survey. From here, you can customize where respondents go in your survey and what they see. You can perform simple tasks like rearranging blocks, or you can add elements like Branch Logic that direct and personalize your respondents' survey experience. Respondents will start at the top of the flow and work their way through until they reach an end point and finish the survey. To learn more about everything you can do with Survey Flow, visit the **Survey Flow** Qualtrics support article.

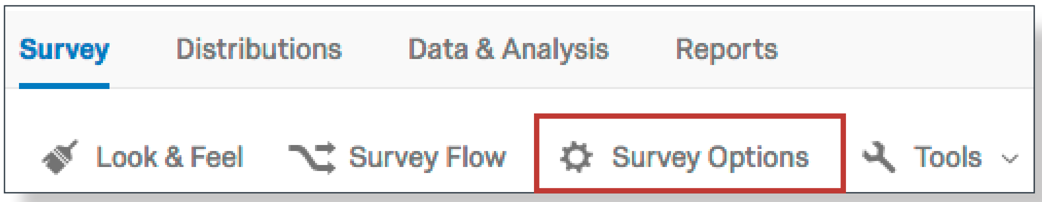
The Survey Flow can be customized by adding new elements such as Branches (used to show certain blocks only to those who meet conditions you specify), Randomizers (used to randomly choose which Blocks each respondent will see), and a variety of other Elements. Branches are useful when you want to send respondents down different paths in the survey. To learn more, visit the **Branch Logic** Qualtrics support article.



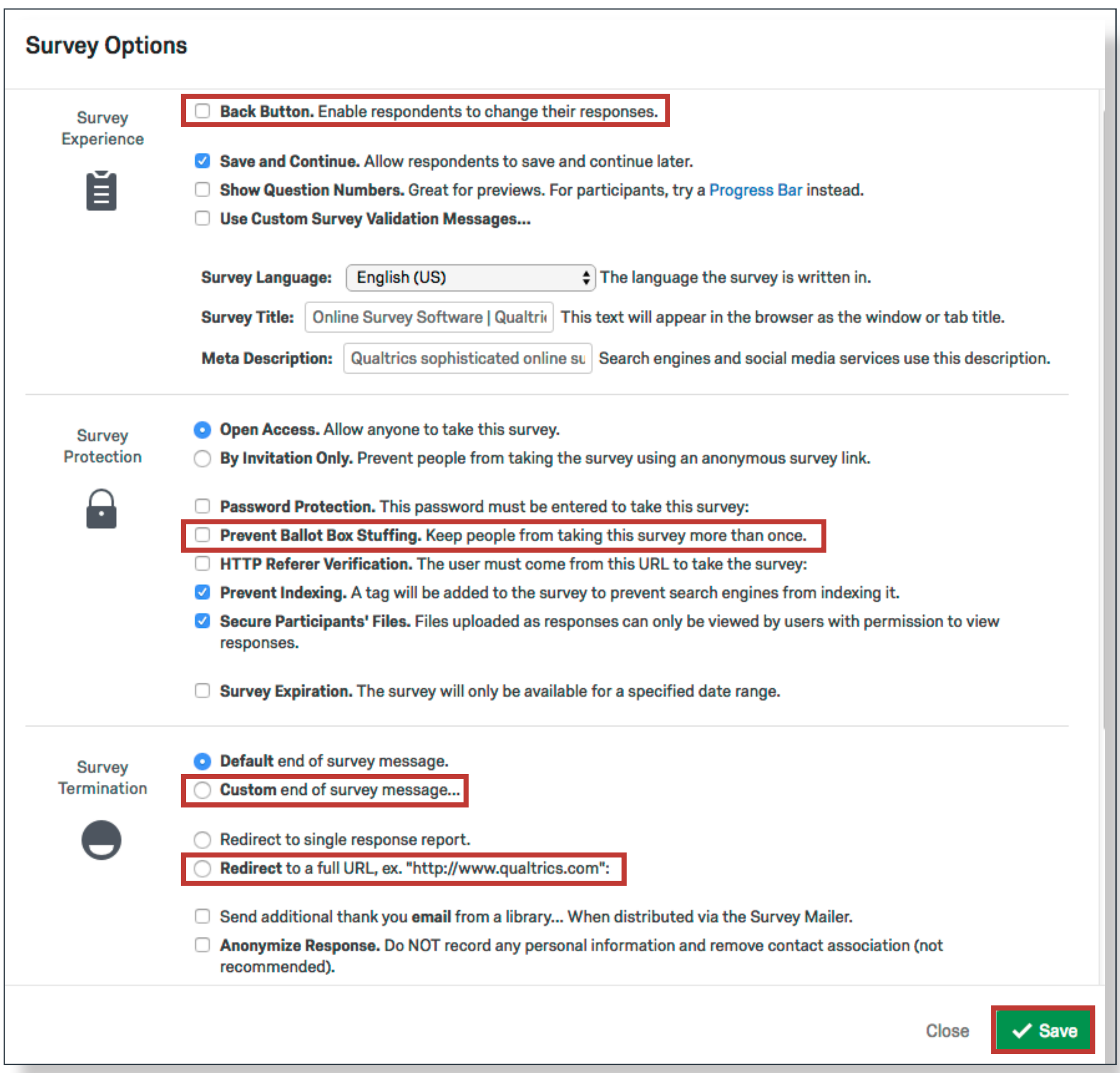
SURVEY OPTIONS

Survey Options is where you go to change many general survey settings, such as adding a back button, adding a custom end of survey message and more.

To access these settings, click on the **Survey Tab** and select ***Survey Options***.



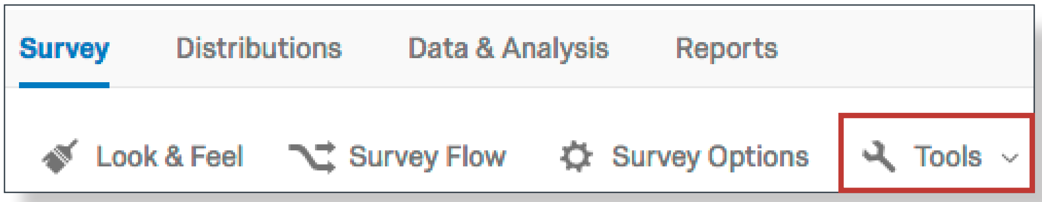
Consider enabling a back button, preventing ballot box stuffing, selecting a custom end of survey message and redirecting respondents to a URL when they are finished. To learn more, visit the **Survey Options** Qualtrics support article. Click **Save** when making any changes.



SURVEY TOOLS

Survey Tools are features to help you create surveys and give them advanced functionality. These features include options like Auto-Number Questions, Email Triggers, Quotas, Translations, and Scoring. To learn more, visit the **Survey Tools** Qualtrics support article.

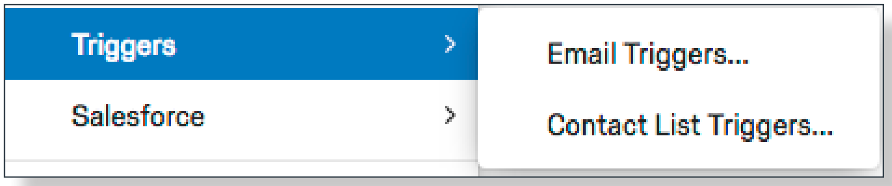
To access Tools, click on the **Survey Tab** and select ***Tools***.



- **Spell Check:** Use this option to run a spell check on your survey. This only works for English.
- **Scoring:** Assign point values to answer choices to use your survey as a test or quiz.
- **Print Survey:** Use this option to print or save a PDF version of your survey.

TRIGGERS

Within the Tools drop-down list, you can select **Triggers**. There are two types: Email and Contact List. Email Triggers allow you to send an email notification to someone when a survey response is completed and specified conditions are met. Contact List Triggers allow you to construct an email list using survey results. To learn more about Email Triggers, visit the **Email Triggers** Qualtrics support article. To learn more about **Contact List**, visit the Contact List Qualtrics support article.



QUOTAS

Within the Tools drop-down list, you can select **Quotas**. Quotas allow you to keep track of how many respondents meet a condition in your survey. You can also specify what will happen to your respondents once a quota has been met, such as ending the survey prematurely or deleting the extra responses. Quotas make sure you gather the exact amount of data required for your project, and ensure you don't go over your maximums. For more information, visit the **Quotas** Qualtrics support article.

1. To set a quota, click the **Tools** drop-down menu and select ***Quotas***.

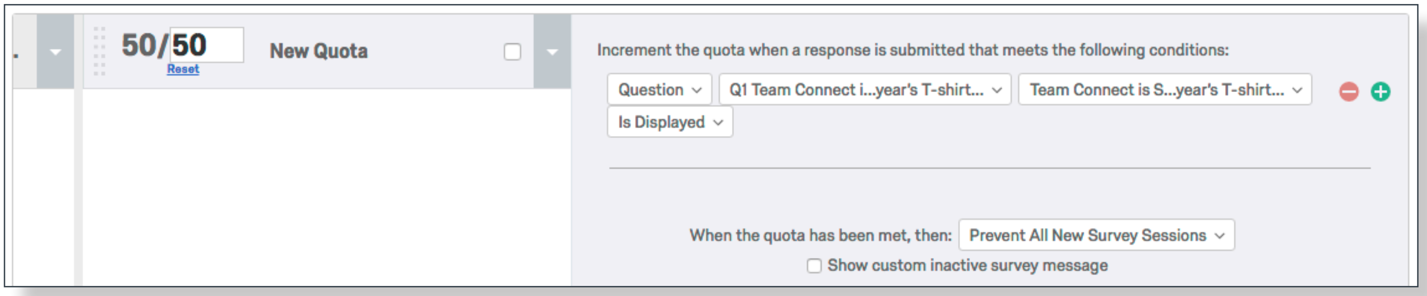
2. Click the blue **Add a Quota** link.

3. Choose whether you want to create a simple logic quota or a cross logic quota. Simple logic typically deals with counts, where as cross logic deals with percentages.

4. Select your increments and set your count.

5. Select what action to take when the quota has been met.

6. Click **Save** at the bottom when finished.

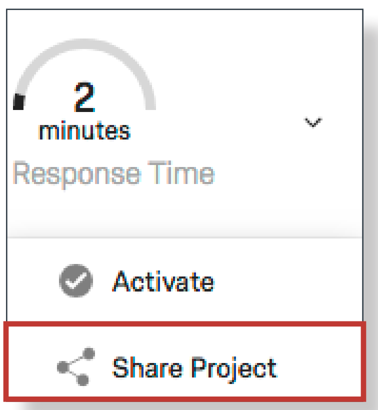


PROJECT SHARING

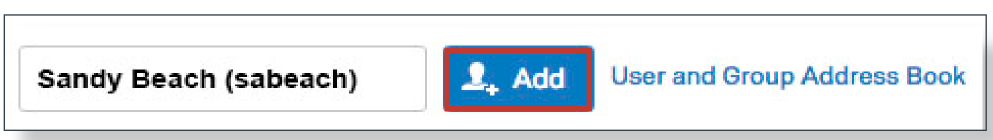
The sharing feature allows you to give other Qualtrics users access to your surveys when they log into their accounts. This way, you can work on the same project without giving out your account information. You can even choose to restrict what type of access other users have to your project. To learn more, visit the **Sharing a Project** Qualtrics support article.

1. To share a project, go to the Qualtrics landing page where all of your projects are listed. To get there from within a project, click on the **four circles** next to the project title.

2. Find the survey you want to share. Click on the drop-down arrow on the right side of the project, and select **Share Project**.



3. Type in the name of the person you want to share the project with, or click User and Group Address Book to add a whole group of people. Click the blue **Add** button after the individual user is selected. Click **OK** to send them an email notifying them that the project has been shared.



4. Adjust the user's permissions to edit, view reports, activate/deactivate, copy and distribute the project. Click **Save** when finished.

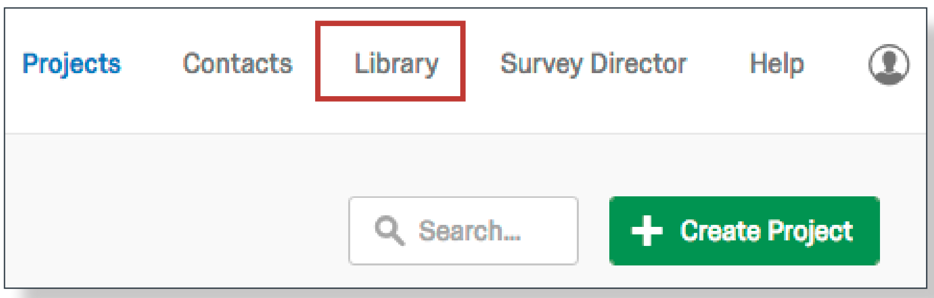
Note: If a project has been shared with you, you can find it under the ***Shared with Me*** folder on the Qualtrics landing page.

GROUP AND INDIVIDUAL LIBRARIES

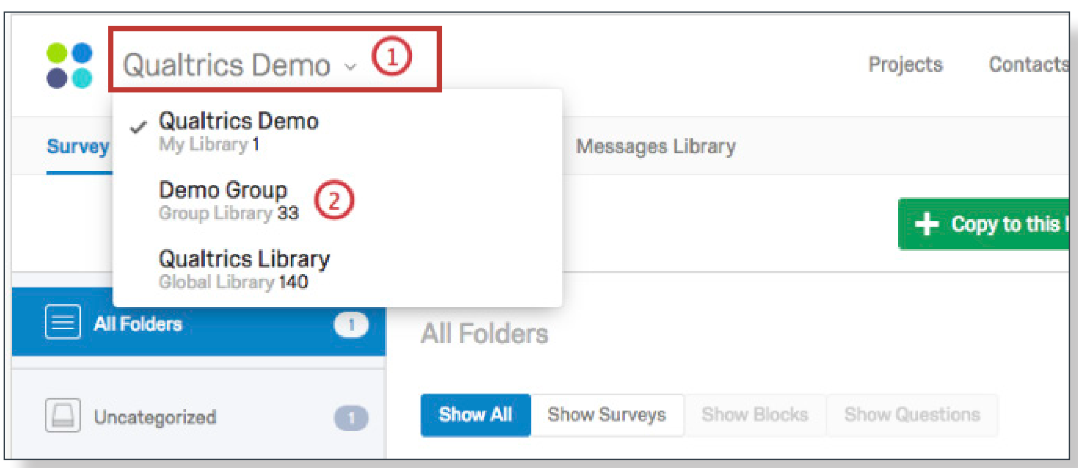
You can store surveys, graphics, messages and other file types within the Library page in Qualtrics. There are four libraries within the Library page: Survey Library, Graphics Library, Files Library and Messages Library. You can also have Personal and Group libraries, and easily switch between them. Your Personal library stores the content you personally create, and your Group libraries store content people in your group create. To learn more, visit the **Library Basic Overview** Qualtrics support article.

If you're just looking to share an individual survey with one or more people, you can share the project using the instructions on page 20. If you're looking to share graphics, multiple surveys and other files, use the Group library (managed by your Qualtrics administrator). To request help with Qualtrics libraries, fill out and submit the web form found on the **Survey Software (Qualtrics)** service page.

• To access libraries, click on the **Library** tab in the top-right of the Qualtrics home page.



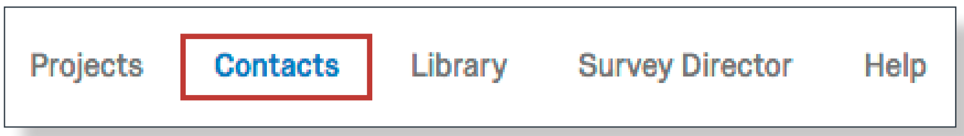
• To switch between libraries, click on the drop-down arrow next to the current library's name, in the top-left corner of the page (next to the four colored circles). Then, choose a different library from the list.



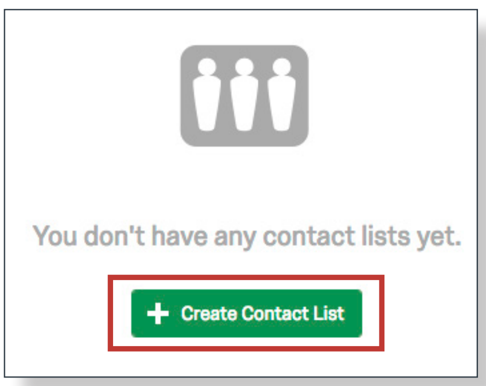
CONTACT LISTS

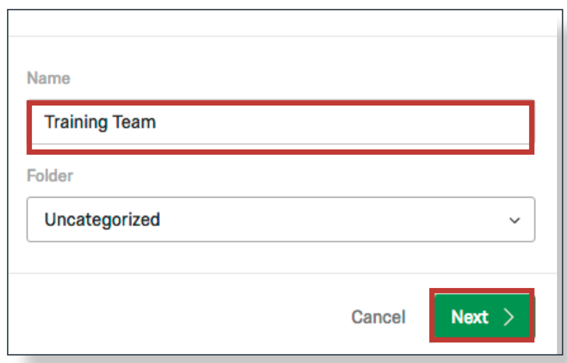
Contact lists, also called panels, allow you to easily distribute surveys to a group of people; they work like mailing lists. There are three ways you can build a Qualtrics contact list: import contacts from a CSV file, import contacts from a previous survey or add contacts manually by entering the information. To learn more, visit the **Creating a Contact List** Qualtrics support article.

1. To create a contact list, click **Contacts** at the top of the page.

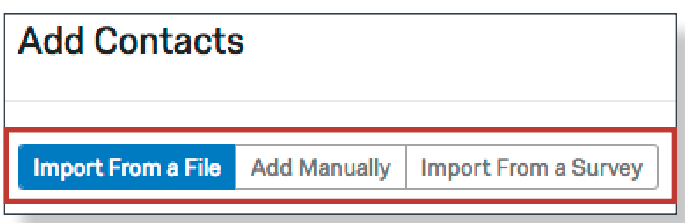


2. Click the green **Create Contact List** button, name the contact list and click **Next**.

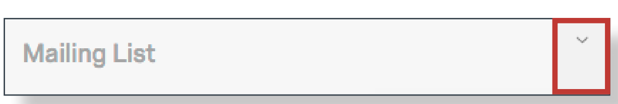




3. Choose whether you'd like to import contacts from a CSV file, add contacts manually or import contacts from a previous survey.



4. Once you've created your contact list, you can click on the drop-down arrow on the right side of the list and view your contact list options. You can export/import the list, send an email, edit details, move or delete the list.

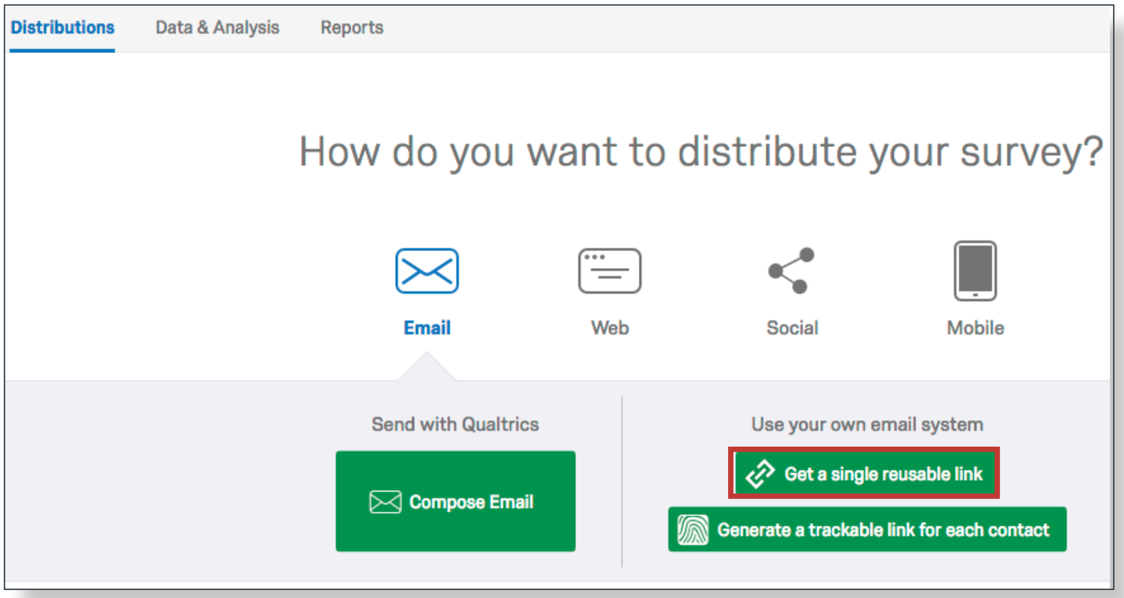


SURVEY DISTRIBUTION

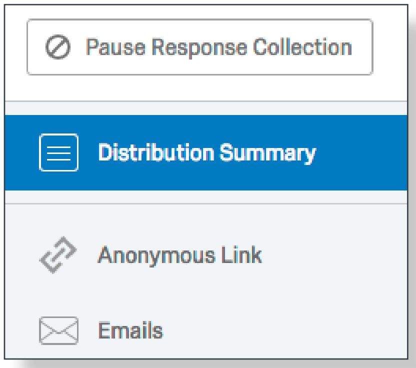
Once you have built your survey, you can use the *Distributions* tab to gather responses. Qualtrics provides a variety of channels for you to distribute your survey, from emailing to QR codes to posting via social media sites.

1. To activate and distribute your survey, click on the **Distributions** tab. The first time you click on this tab, you'll be prompted to choose your method of distribution. Choose your method (this can be changed at any time).

Note: For most survey purposes, you'll want to use the single reusable link, because survey responses can be collected over and over and no identifying information is collected from the participants. The link can be distributed to anyone, and it will be used to collect responses until the survey is deactivated.



2. Once you've chosen your distribution method, you can view the *Distribution Summary* of how many responses you've received, pause response collection, and choose a different distribution method.



DISTRIBUTION METHODS, EXPLAINED

• **Anonymous Link**

The Anonymous Link allows you to collect responses anonymously. No identifying information will be collected unless you specifically ask for it in your survey. This link can be pasted into an email or placed on a website for anonymous distribution.

• **Emails**

Instead of collecting anonymous responses, you can create a list of specific contacts and use the Qualtrics Mailer to send a unique survey link to each contact. These links will record the identifying information that you already set up in your contact list.

• **Personal Links**

For those cases where you need to use a third-party mail system to distribute survey invitations but also need to track which response belongs to which recipient, you can generate a list of unique, or “Personal”, survey links. These links are tied to specific survey recipients, and the names and any other uploaded Embedded Data will be included with the responses in the results.

• **Social Media**

The Social Media section will help you quickly post your survey to social media. When using this channel, the referring social media site will be recorded as Embedded Data. The options available are Twitter, Facebook, Reddit, LinkedIn, Google+, and Pinterest.

• **Offline App**

Qualtrics Offline Surveys is an application available for iOS and Android that allows you to administer surveys on your mobile device without an internet connection. Responses can be collected in the field on your mobile device and then uploaded to Qualtrics as soon as you have a secure Internet connection.

• **QR Code**

When someone takes a picture of this code with their smartphone’s QR Code Reader, they will be directed to your survey.

• **Purchase Respondents**

If you don’t have easy access to your desired survey respondents, Qualtrics can help you get in touch. Use the Purchase Respondents section to fill out your demographic needs and get a personalized quote.

RESPONSE COLLECTION

Edit Active Survey

Once you've distributed your survey, it is recommended that you don't make changes to the survey if you've started collecting responses. If you need to edit an active survey, view the Testing and **Editing an Active Survey** Qualtrics support article to learn which changes can be made without invalidating the data. You must unlock your survey before editing it, once response collection has started.

Pause Response Collection

Pausing response collection turns your survey "off" so that it no longer accepts new responses. No one will be able to start your survey while it is paused. The Anonymous Link will be disabled, and any other survey links you've distributed will also be disabled.

1. To close your survey, go to the Qualtrics landing page where your projects are listed, and click the drop-down arrow next to project you want to close.

2. Select **Close**.

3. When prompted, select whether you want to close all active surveys, or allow them to be finished. Then, click the red **Pause Response Collection** button.

Note: You can also pause response collection from the *Distributions* tab within a project.

To resume (reactivate) a survey, click the drop-down arrow next to the survey and select *Activate* at the top (where Close used to be).

Set a Survey Expiration Date

In addition to manually closing the survey, you can set a Survey Expiration date. When the expiration date passes, the survey will officially "pause".

1. To set an expiration date, navigate to the survey, then click on the **Survey Options** section.

2. Scroll to the *Survey Protection* section. Select the box for **Survey Expiration**, and set the dates.

3. Click **Save** when finished.

DATA & ANALYSIS

The Data & Analysis tab allows you to manage, add information to and analyze individual participant responses. The tab is organized into four sections: Data, Text, Cross Tabs and Weighting.

Data

The *Data* section of the Data & Analysis tab shows you individual responses, and the total number of recorded responses and responses in progress. Recorded Responses include any survey response that was 100% completed by the respondent, as well as any partially completed responses that have been closed out. Preview and test responses are also included in the Recorded Responses section.

From the Data section, you can export and edit the data, as well as add filters. Next to each individual response, there's an Actions drop-down menu. This is where you can view, delete or export an individual response. To learn more, visit the **Recorded Responses** Qualtrics support article.

Text

If your survey included open-ended questions where respondents could enter text, you can analyze that feedback under the *Text* section of the Data & Analysis tab. You can search and categorize all textual responses.

To start creating topics that serve as "tags" for categories of textual information you want to track, click the green plus sign button. Once you create topics, you'll see graph visualizations. This is helpful for recognizing themes and popular opinion. To learn more, visit the **Text Analysis** Qualtrics support article.

Cross Tabs

Cross Tabs are statistical tests. Qualtrics provides a cross tabulation tool for you to perform multivariate analysis on two or more variables at a time. This tool includes numerous options to customize your cross tabs and will automatically calculate p-value and Chi-Square statistics. To learn more, visit the **Cross Tabs** Qualtrics support article.

Weighting

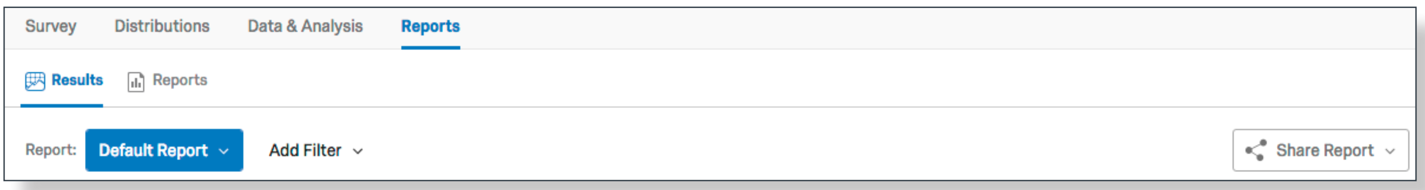
Response weighting allows you to change the weights of variable fields so the data in your Reports tab will reflect targeted demographics. To learn more, visit the **Response Weighting** Qualtrics Support article.

REPORTS

The *Reports* tab allows you to view a visualization summary of the collected results for each question. It also allows you to build and share reports, as well as filter the default report. In the Reports section, you can build dynamic, paginated reports that visualize your data. You can create reports from scratch, or from content you customized in your Results section.

1. To view the Report Results, click on the **Reports** tab and select ***Results***. You can change the visualization type by clicking on the graph and selecting a new type within the editing pane. To export the default report, select the **Share Report** drop-down menu and select **PDF** (or Word Document). To learn more, visit the **Results-Reports Basic Overview** Qualtrics support article.

2. To build a report from the ground up, click on the **Reports** tab and select ***Reports***. To learn more, visit the **Advanced-Reports Basic Overview** Qualtrics support article.



ORGANIZE PROJECTS

From the Qualtrics landing page, where all of your projects are listed, you can create folders to organize projects, sort projects and complete certain actions.

1. To create a new folder, click **New Folder** on the left side of the My Projects page.

2. Name the folder

3. From your master list of projects, drag and drop surveys into their corresponding folder.

• To adjust the way your projects are sorted, click the **drop-down arrow** next to *Created*, on the top of the page.

• To activate, edit, delete, share a project and more, click on the **drop-down arrow** next to the project and select the appropriate action.