

CoreXM Week by Week User Guide

Lite / New User Guide

* Requires Qualtrics Username to access

Bookmark the following enablement resources. Learn to use and navigate each.

- [XM Basecamp](#) *
- [Content Hub](#)
- [Qualtrics Support](#) *
- [Product Guides](#)
- [Qualtrics Community](#) *

Qualtrics Platform Essentials Certification (L1)*

Learn the fundamentals of Qualtrics and XM.

1. [Introducing XM](#)
2. [Planning a Survey](#)
3. [Building a Survey](#)
4. [Distributing a Survey](#)
5. [Understanding Raw Data](#)
6. [Reporting Survey Results](#)

[Pass L1 Exam](#)
(exam purchased separately)

Instructor Led Training

Qualtrics Expert led 1:1 training to help you master key functionality in the platform. [Get Info.](#) [Get a quote.](#)

Week 1

Introductory Training Videos*

Building your research project:

Webinars

- [Designing a Survey](#)
- [Launching a Survey](#)

Building Your First Project

- [Best Practice Design](#)
- [Configuring Research Projects](#)
- [Customizing Your Project](#)
- [Finalizing Your Project](#)
- [Collecting Data](#)

Reporting Your Data

- [Understanding Raw Data](#)
- [Analyzing Data](#)
- [Reporting](#)

Week 2

Introductory Product Guides

The following **written guides** will solidify your knowledge of the platform as well as dive deeper into specific functionality.

1. [Qualtrics Terminology](#)
2. [Creating a Project](#)
3. [Surveys Builder Overview](#)
4. [Workflows Overview](#)
5. [Distribution Overview](#)
6. [Data & Analysis Overview](#)
7. [Results & Reports](#)

Additional Resources

- [Increasing Response Rates](#)
- [Research Articles](#)

Week 3

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COMPLETE IN THIS ORDER



CoreXM Week by Week User Guide

Heavy / Intermediate User Guide

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First Complete the New / Lite User Guide

Bookmark the following enablement resources. Learn to use and navigate each.

- [XM Institute](#)
- [Events & Webinars](#)
- [XM Community](#)
- [Research Best Practice](#)
- [eBooks](#)
- [XM Marketplace](#)

+ week 1 bookmarks

Qualtrics Core XM Expert Certification (L2) *

Once you complete the Qualtrics Platform Essentials (L1) Certification, you can progress to the L2 certification.

1. [Advanced Survey Building](#)
2. [Custom Survey Experiences](#)
3. [Distributing to Audiences](#)
4. [Analyzing Your Data](#)
5. [Reporting on Your Insights](#)

[Pass L2 Exam](#)

(exam to be purchased separately)

Optional Instructor led training

available to support your

Certification [Get Info](#). [Get quote](#).

Targeted Training Videos*

From projects to programs. The **video series** below will guide you on using specialized research tools & methodology.

1. [Questionnaire Best Practices](#)
2. [Minimize survey fatigue and bias](#)
3. [Building Research Samples and Panels](#)
4. [Analyzing Data with Stats iQ](#)
5. [Analyzing Text Responses with Text iQ](#)
6. [Website/App Feedback](#)

Targeted Practice Guides

To master and support quality research projects and programs, read these guides and keep them close by.

Product Guides

- [Survey Options](#)
- [Survey Tools](#)
- [Embedded Data](#)
- [Stats iQ](#)
- [Text iQ](#)

Common Use Cases

- [Panel Company Integration](#)
- [Assigning Randomized IDs](#)
- [A/B Testing](#)
- [Longitudinal Studies](#)
- [Conjoint Analysis Projects](#)
- [MaxDiff Analysis Projects](#)

Week 4 to 5

Week 5

Week 6

First Complete the Lite / New User Guide

COMPLETE IN THIS ORDER



CoreXM Week by Week User Guide

IT / Administrator User Guide

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Administration Basics

This content will inform you of the roles and responsibilities of an administrator, as well as privacy and security info.

Video Series *

- [Qualtrics Administration](#)

Written Guides

- [Admin Tools Overview](#)
- [Qualtrics Terminology](#)
- [Qualtrics Permissions List](#)
- [Data Protection & Privacy](#)
- [GDPR Compliance](#)

Administration Product Guides

These links provide quick reference guides to the details of Qualtrics administrator tools.

- [Qualtrics Terminology](#)
- [Admin Reports](#)
- [Managing Users](#)
- [Security Tab](#)
- [Data Privacy Tab](#)
- [Usage Tags](#)
- [Survey Project Approvals](#)
- [Themes Tab](#)
- [Organization Settings](#)
- [SSO Overview](#)

Instance Management

These links connect you to useful documentation for managing your organization's research projects, contacts, and processes.

- [Collaborating on Projects](#)
- [Organization Libraries](#)
- [XM Directory Administration](#)
- [Website/App Feedback Administration](#)
- [Extensions & Integrations](#)
- [Custom Work & Professional Services Requests](#)
- [Utilizing Your Qualtrics Resources](#)
- [Need a hand? Contact support](#)

Week 7

Week 8

Week 9



START HERE

If you are an Admin with day to day platform responsibilities, ensure you start with the preceding two guides first.