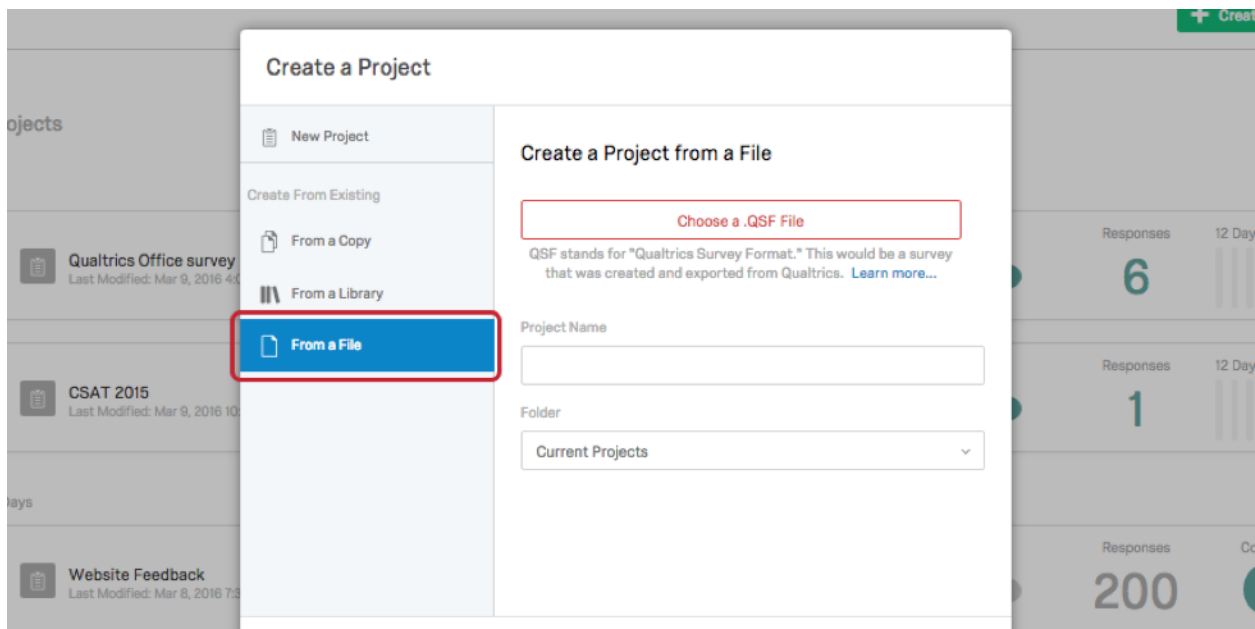Step-by-step instructions for adapting our **ePortfolio Outcomes Assessment Template**

**Tip:** *Qualtrics provides free accounts which include 1 active survey and 100 responses.*

1. After accessing both the survey and report templates on our website, log into Qualtrics, create a new project (*Qualtrics guide*) and upload the QSF file into the survey (*Qualtrics guide*).
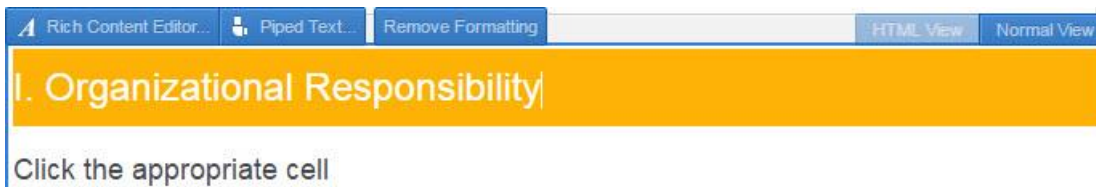

2. After uploading the survey template, enter the Printed Reports area
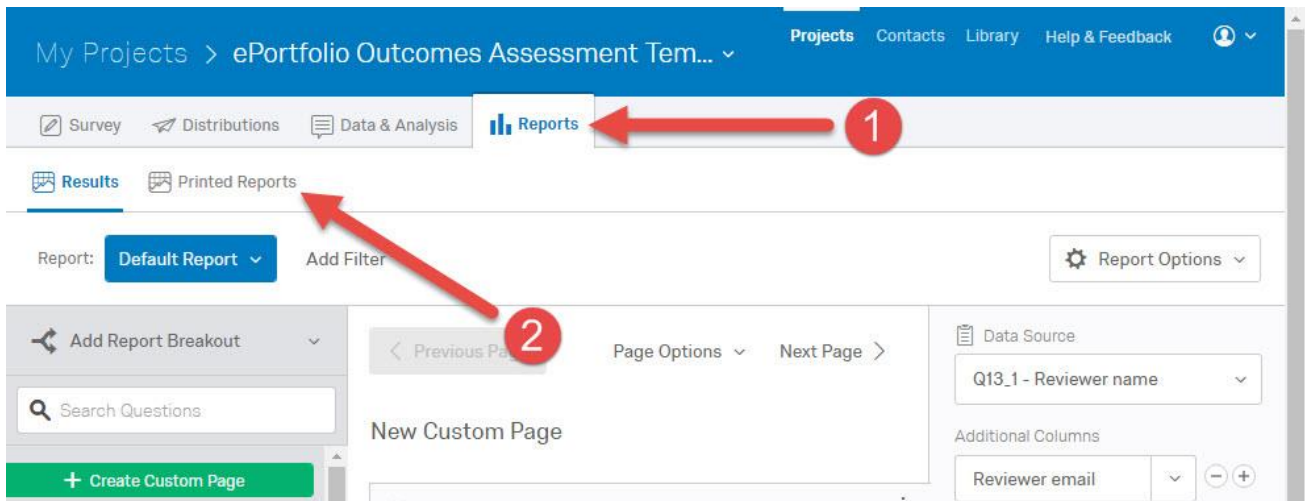
3. Create a new report, click **Cancel** on the "Generate Report" screen, and then upload the QRF file:
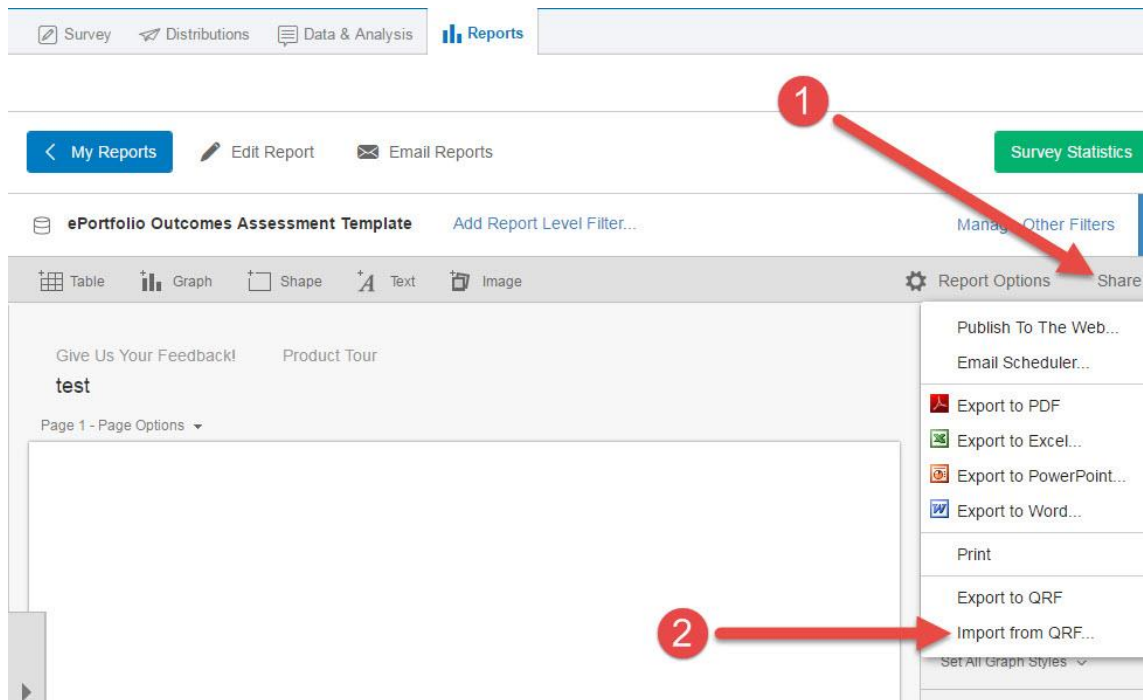
4. You're now ready to edit the survey template. Navigate back to the Survey tab to change the colored bar header text. Click the box and start typing.


Tip: *You can update the banner color by accessing the rich content editor, right-clicking inside the banner, and selecting **Table Properties**. On the **Advanced** tab, replace the hex colr code in the **Style** box.*

5. Next, enter the outcome criteria by clicking inside the appropriate box
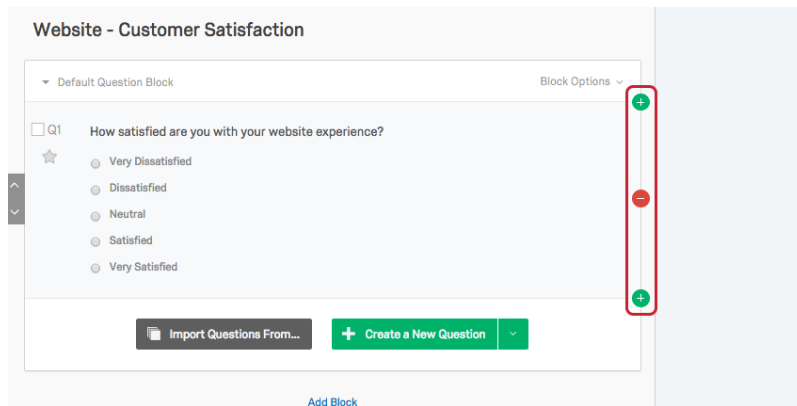

Tip: *you may need to use the horizontal scrollbar to access and edit the far-right column on each row*

6. Delete rows from the outcomes rubric by clicking on the appropriate rubric question. Next, click the minus button until you have the number of rows you need.
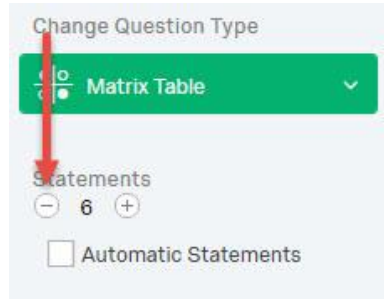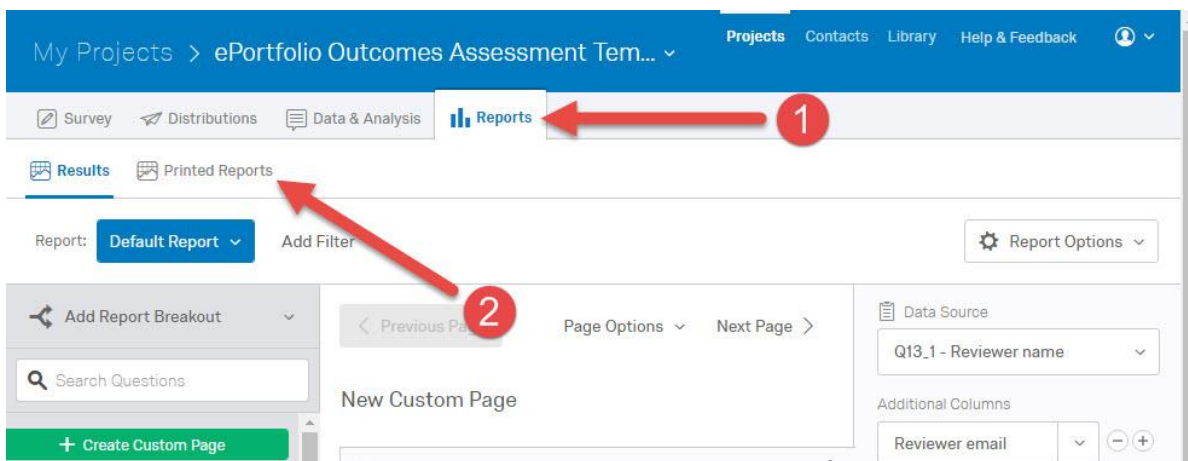

7. After you have entered text into all the outcome rubric rows you need, delete the unused questions.

Note: *make sure you don't delete the final "overall comment" question at the bottom of the screen.*

8. Update the survey password, *or optionally remove the password*

9. Now you'll need to go back into the **Printed Reports** area for some cleanup.

10. Once you have entered into the report template you created earlier, you will need to edit the slider question labels at the top of the report. Click the **"Q13 Please…"** title and enter your outcome name in the pop-up.
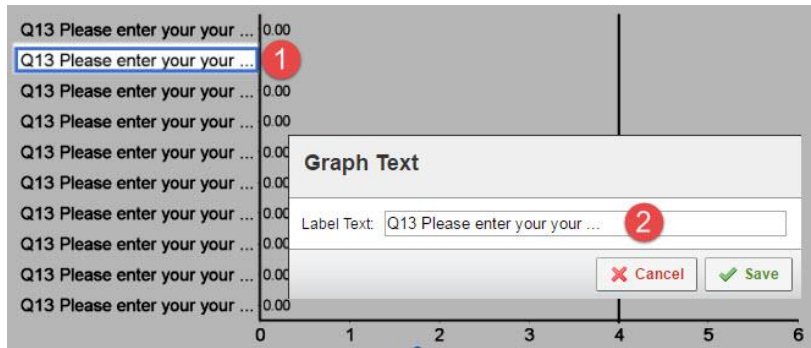
Tip: the sliders are listed numerically from top to bottom

11. Remove any unused slider rows at the bottom of the graph by right-clicking the graph. Next, click the **minus button** in the pop-up menu.
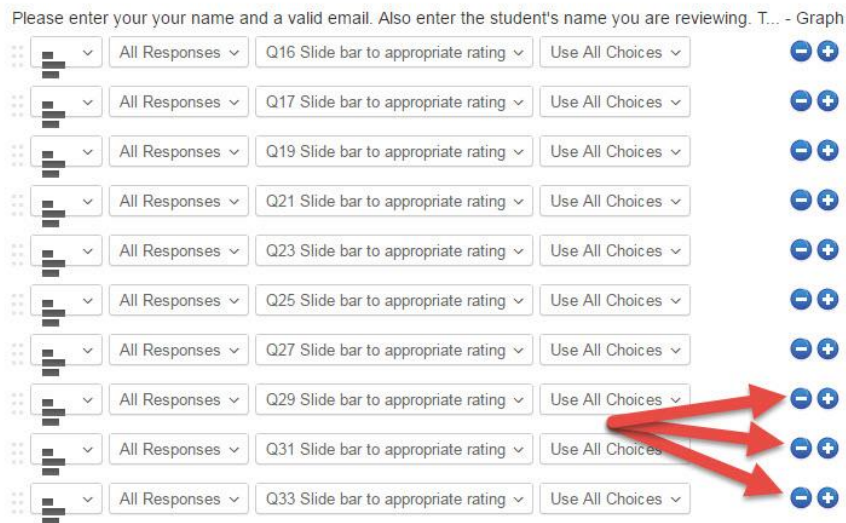
12. You will also need to update the outcome banner text on the Report template by double-clicking the box and typing in the outcome name.
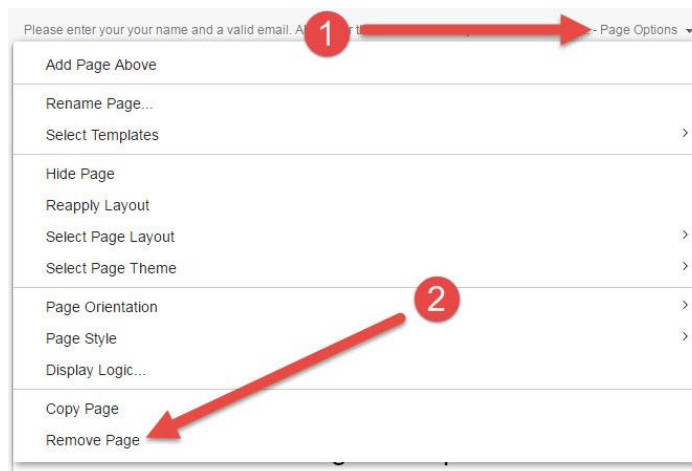

Tip: you can also update the outcome description directly under the banner
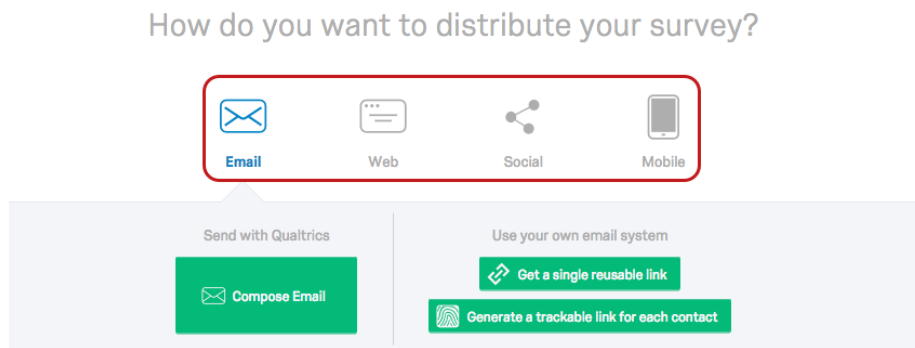
13. Next, click on the outcome rubric and resize the box as needed.

14. Delete any unused pages by clicking the **Page Options** link and then selecting **Remove Page**

15. When you have finished editing your survey and form, you are ready to [activate the survey](#)

16. Once you have assessed student portfolios, you can filter your report to display results for a single student. First, click the **Add Report Level Filter** link.

17. Next, select the **Q13 Please enter…** question; the **Student name** choice; **Contains** as your qualifier; check the **Ignore Case** box, type in the student's name (*full name if students share a last name*), and click **Save**
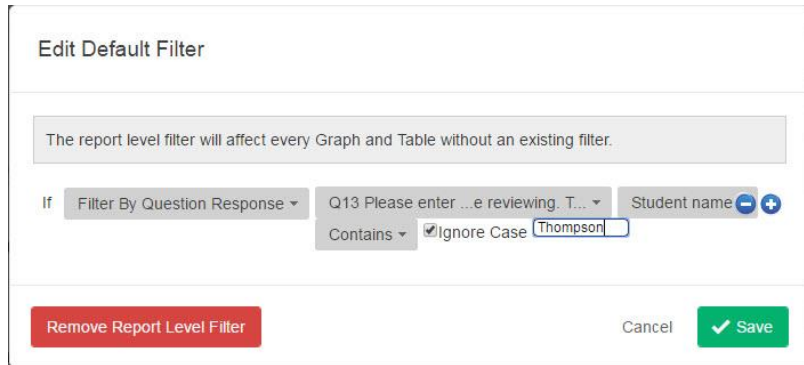
18. You can then download a PDF to share with the student using the **Share** menu