

# Introduction to Qualtrics

## ITSC



October 2023

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## A. General Information

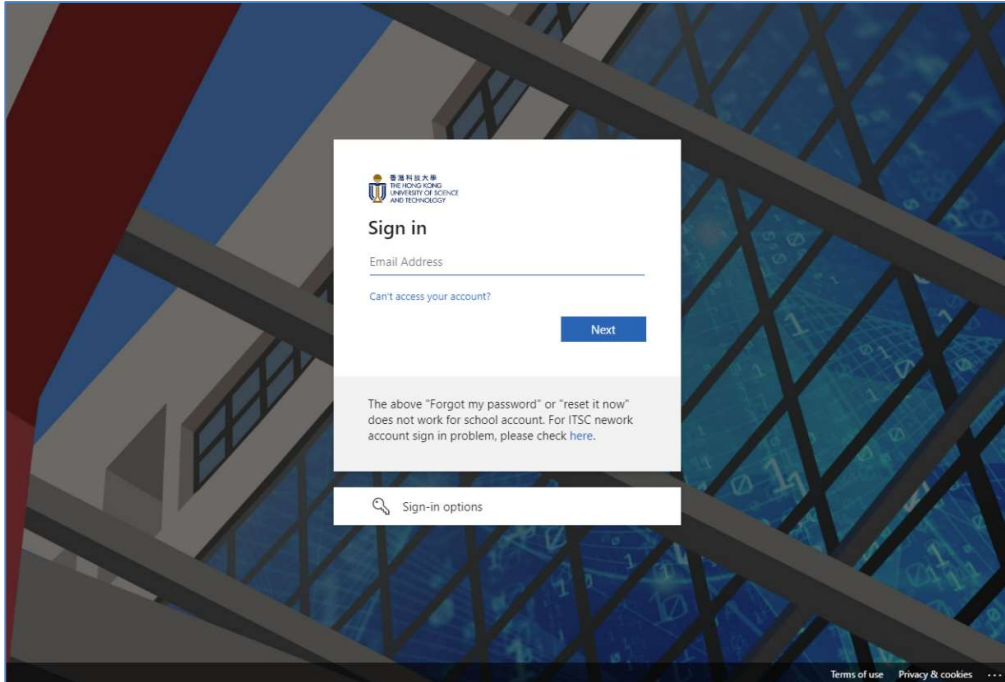
Qualtrics is a cloud-based general survey system, helping HKUST users to conduct surveys for their research studies, activities and events evaluation, etc.

To use Qualtrics, please visit: <https://ust.qualtrics.com>

For enquiry, please contact us at [qualtrics@ust.hk](mailto:qualtrics@ust.hk).

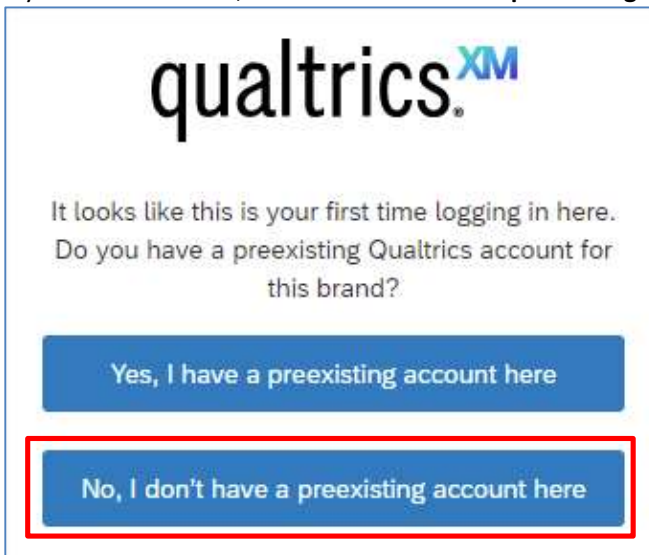
## B. Login

1. Open a web browser and type the address of the Qualtrics web site.  
<https://ust.qualtrics.com>
2. Login with your **ITSC Network Account** with @ust.hk or @connect.ust.hk.



## New Qualtrics User

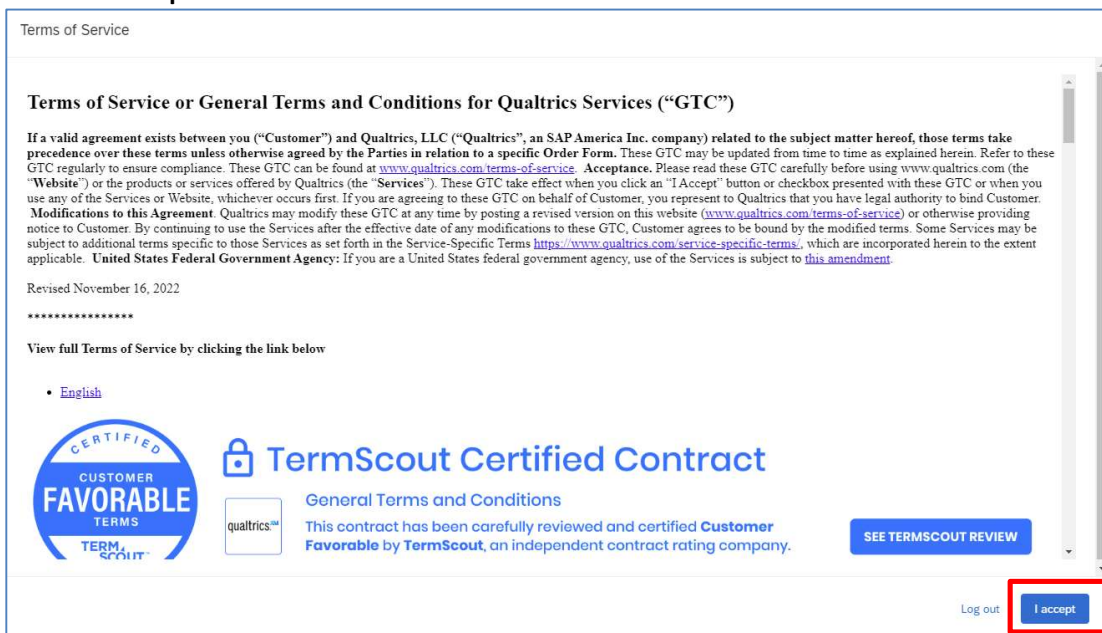
1. If you are a new user, click the **I don't have a preexisting account here** button.



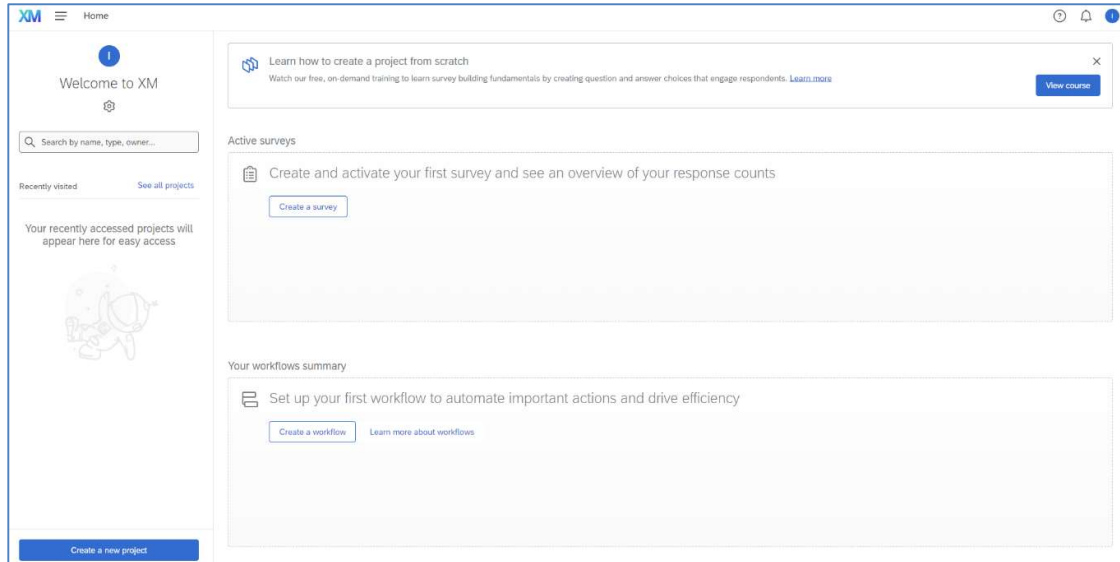
2. The user account is created in UST Qualtrics platform. Click the **Sign in** button.



3. Click the **I accept** button to confirm the Terms of Service.

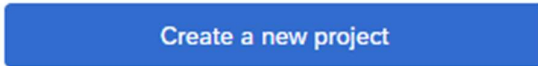


4. You will be logged in. Qualtrics will display the **Qualtrics homepage**.

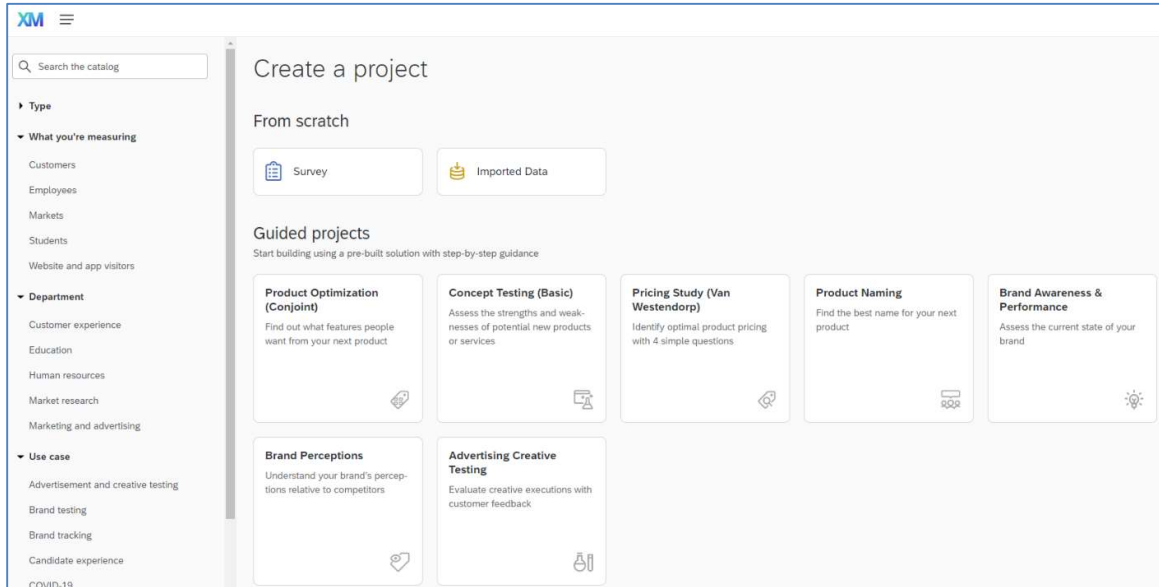


## C. Create Project

To create a new survey, click the **Create a new project** button at the **Qualtrics homepage**.



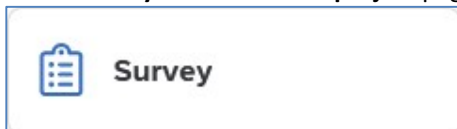
It will direct to the **Create a project** page. You can create a **Survey Project from scratch**, or create a project by using the survey templates provided by Qualtrics. Here, we will focus on creating a **Survey Project from scratch**.



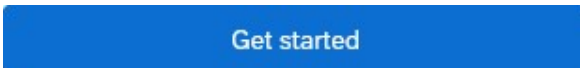
### Create a Survey Project from Scratch

It allows you to create a survey from scratch and add questions to the survey one by one.

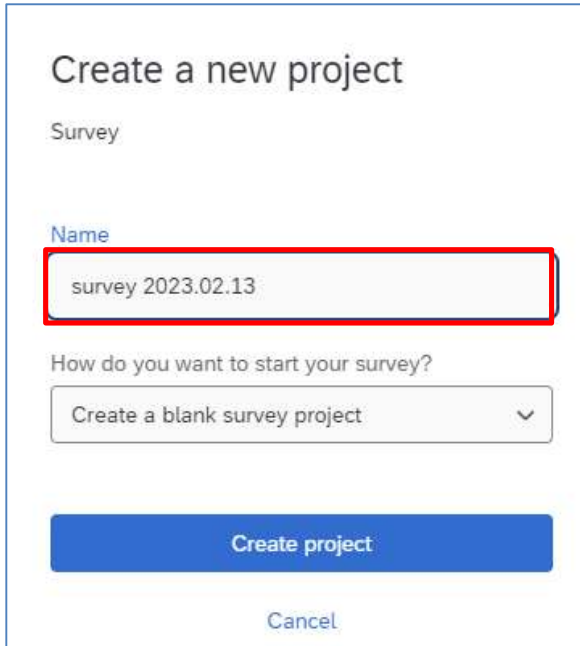
1. Select **Survey** at the **Create a project** page.



2. Click the **Get started** button.



3. Enter a **Name** for the survey project.



Create a new project

Survey

Name

survey 2023.02.13

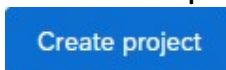
How do you want to start your survey?

Create a blank survey project

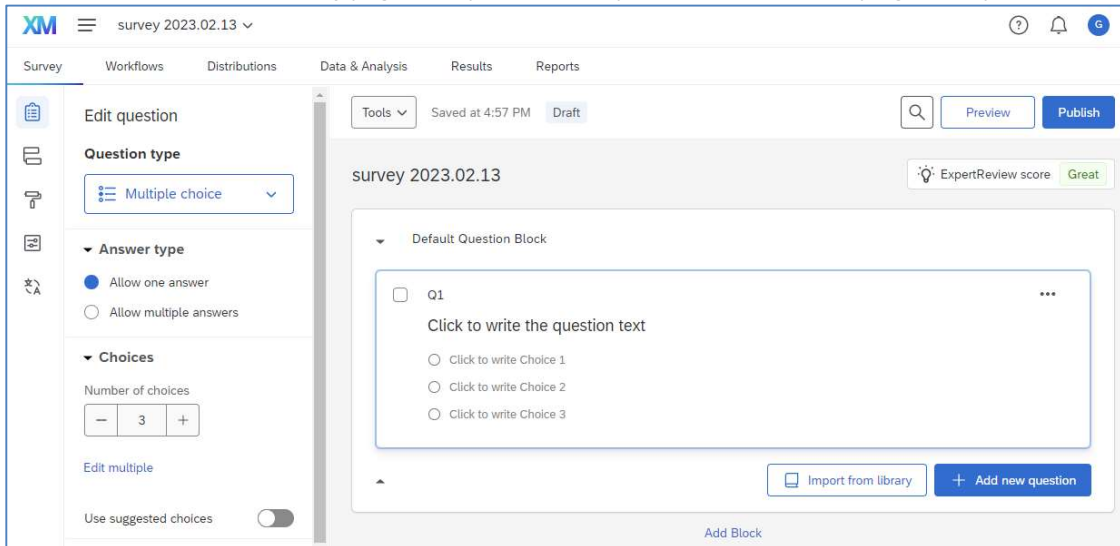
Create project

Cancel

4. Click the **Create project** button.



5. It will direct to the **Edit Survey** page, and you can add questions to the survey right away.



XM survey 2023.02.13

Survey Workflows Distributions Data & Analysis Results Reports

Tools Saved at 4:57 PM Draft

Preview Publish

survey 2023.02.13

ExpertReview score Great

Default Question Block

Q1

Click to write the question text

Click to write Choice 1

Click to write Choice 2

Click to write Choice 3

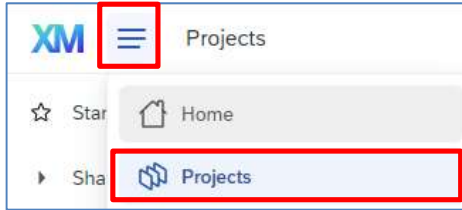
Import from library Add new question

Add Block

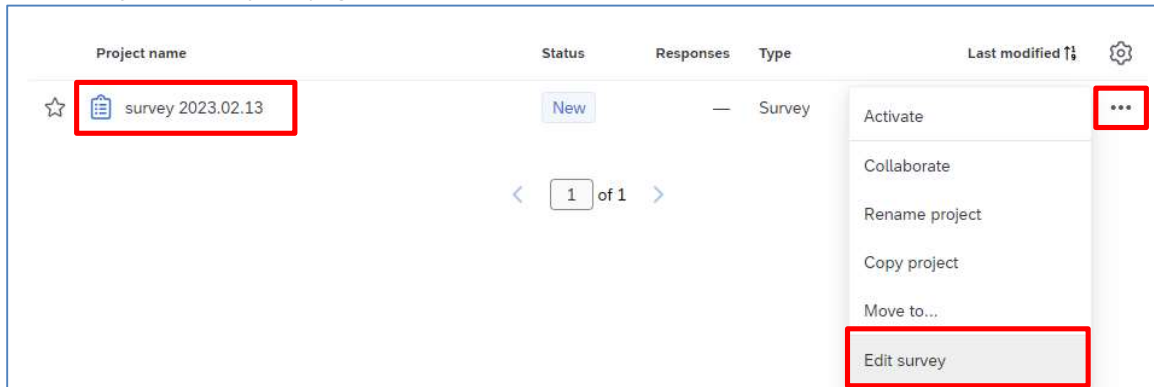


## D. Prepare Survey

To work on a survey, click the **Menu** button and select **Projects**.

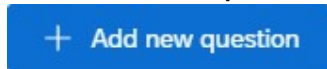


It will direct to the **Projects** page. You can click on the **survey name**, or click the “...” button and select **Edit survey** at the **Projects** page.

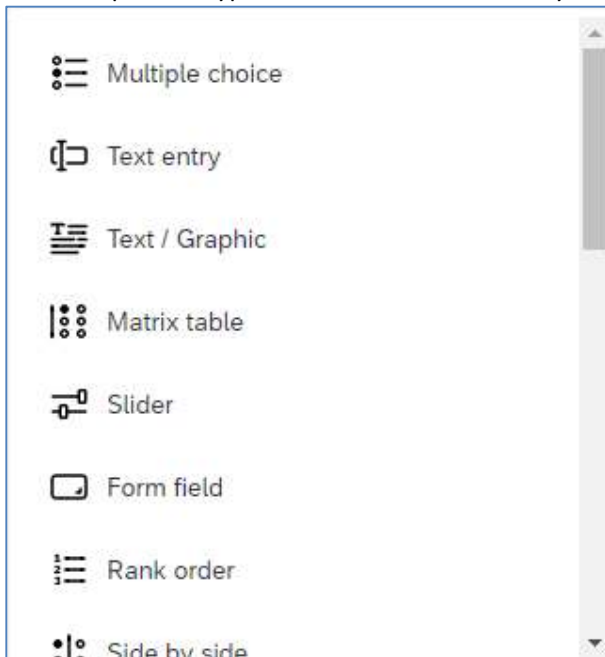


### Add / Edit Question

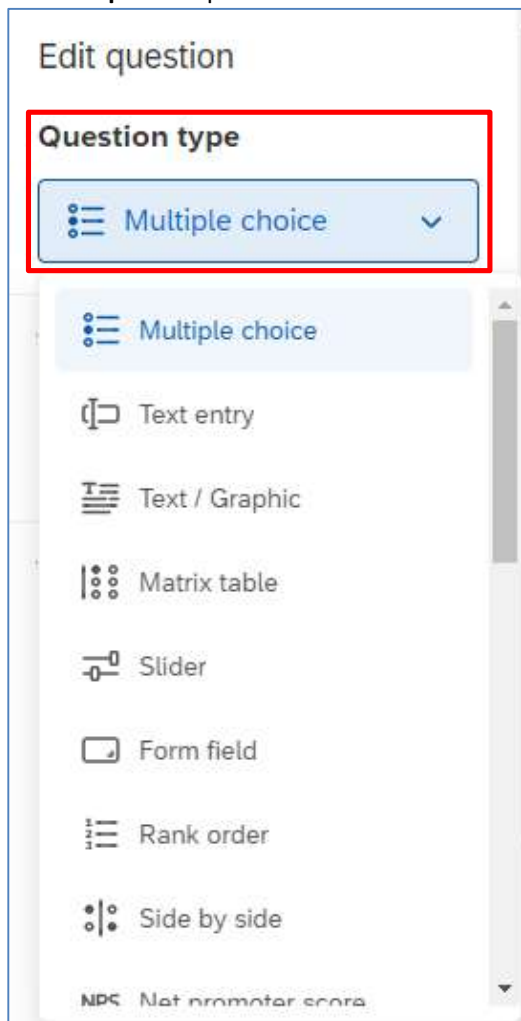
1. Click the **Add new question** button.



2. A dropdown will display. You can select a question type from the dropdown. A question of the selected question type will be added to the survey.



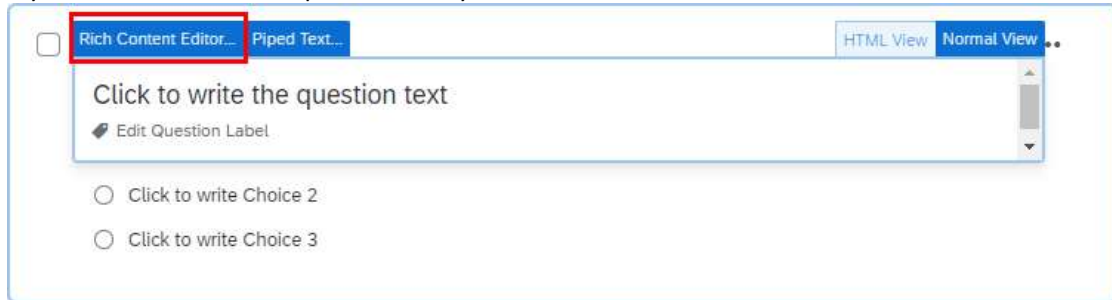
3. If it is not the question type you need, you can change it by clicking the **Question type** dropdown at the **Edit question** pane at the left hand side.



4. Click on the area **Click to write the question text** to enable the text editor and type the question text there.

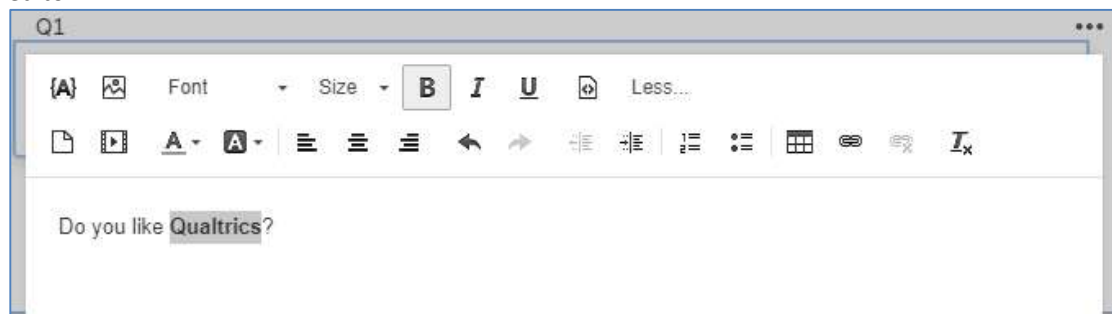


5. If you want to format the question text, you can click on the **Rich Content Editor...** button.



The screenshot shows a text editor interface. At the top, there are two tabs: "Rich Content Editor..." (highlighted with a red box) and "Piped Text...". To the right of these tabs are "HTML View" and "Normal View" buttons. Below the tabs is a large text area containing the placeholder text "Click to write the question text" and a small icon with the text "Edit Question Label". Below the text area are three radio buttons: "Click to write Choice 2" and "Click to write Choice 3".

6. Format the text as you prefer. When you finished, click anywhere outside the text editor to close the editor.



The screenshot shows a question editor window titled "Q1". It features a rich text editor toolbar with various icons for text formatting (bold, italic, underline, font color, background color, font size, text color, bulleted list, numbered list, link, unlink, table, etc.). Below the toolbar, the text "Do you like Qualtrics?" is displayed, with the word "Qualtrics" highlighted in a grey box.

7. If the question is a multiple choice, it will have 3 number of choices (answer options) by default. You can enable **Use suggested choices** at **Edit question** pane. Qualtrics would suggest a list of choices to your question. If you find the choices are not appropriate, you may change them by clicking the dropdown and select an appropriate type.



The screenshot shows the "Choices" settings panel. It has a title "Choices" with a dropdown arrow. Below the title is a section "Number of choices" with a minus button, the number "5", and a plus button. Below this is a toggle switch labeled "Use suggested choices", which is currently turned on (highlighted with a red box). Below the toggle is a list of suggested choice types: "True - False", "Yes - No" (highlighted with a red box), "Below Avg - Above Avg", and "Worse - Better".

8. If you want to change the number of choices, you can click the “-” or “+” button to add or remove choices, or select **Remove Choice** to delete particular choice.

The screenshot shows the 'Edit question' interface in Qualtrics. On the left, the 'Question type' is set to 'Multiple choice'. Under 'Answer type', 'Allow one answer' is selected. In the 'Choices' section, the 'Number of choices' is set to 5, with minus and plus buttons highlighted. A context menu is open over the 'Definitely not' choice, showing options like 'Allow Text Entry', 'Text Entry Size', 'Text Entry Validation', 'Rich Content Editor', 'Insert Graphic...', 'Exclude From Analysis', 'Insert Piped Text', 'Add Display Logic...', 'Assign To Group', 'Move Up', 'Move Down', and 'Remove Choice' (highlighted at the bottom). The main question text is 'Do you like Qualtrics?' and the choices are 'Definitely not', 'Probably not', 'Might or might not', 'Probably yes', and 'Definitely yes'.

9. To set the question as mandatory, enable **Add requirements** at **Edit question** pane and check the **Force response** checkbox.

The screenshot shows the 'Response requirements' section in the 'Edit question' pane. It includes a toggle for 'Add requirements' (which is turned on), a radio button for 'Force response' (which is selected), a radio button for 'Request response', and a toggle for 'Add validation' (which is turned off).

10. Some question types may have more options on validation checking. You may enable **Add validation** at **Edit question** pane and select the appropriate criteria (e.g. you may require the answer must be a number and must be within a range from 1 to 10).  
**Note:** The options available in Add validation depend on the Question type you select.

**Response requirements**

Add requirements ☐

**Add validation** ☒

Content type

Content type

Minimum

Maximum

Maximum decimals

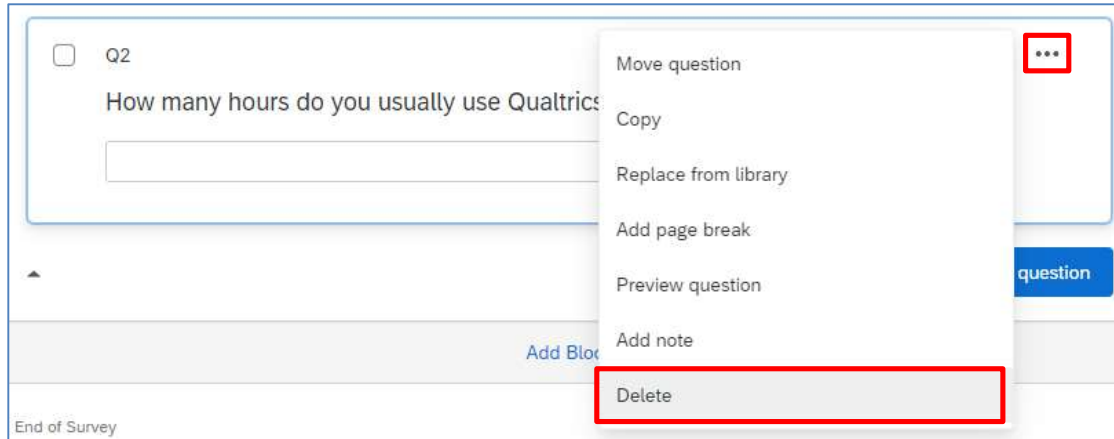
## Delete Question

1. Hover the mouse on the question, click the **red minus** (Remove Question) button.

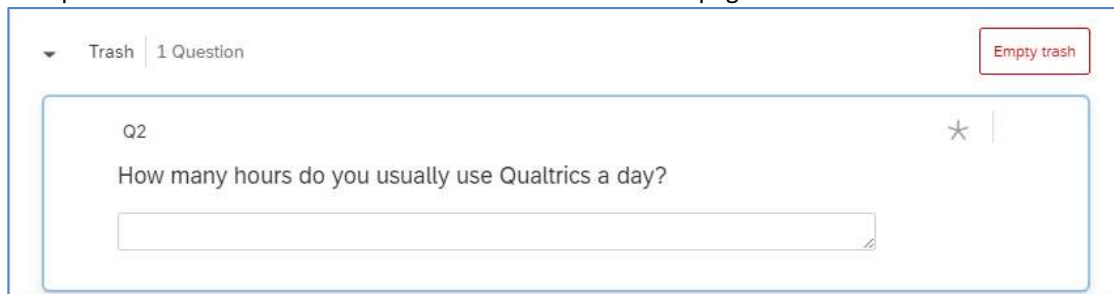
Q2

How many hours do you usually use Qualtrics a day?

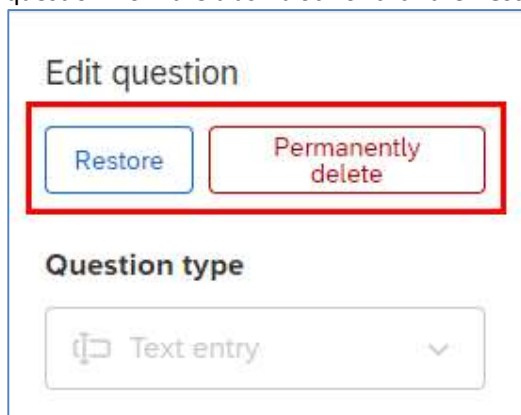
2. You can also click the “...” button and select **Delete** to delete the question.



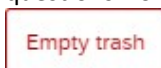
3. The question will be moved to the **Trash** at the bottom of the page.



4. Select the question. Click the **Permanently delete** button at **Edit question** pane to remove the question from the trash block or click the **Restore** button if you want to get back the question.

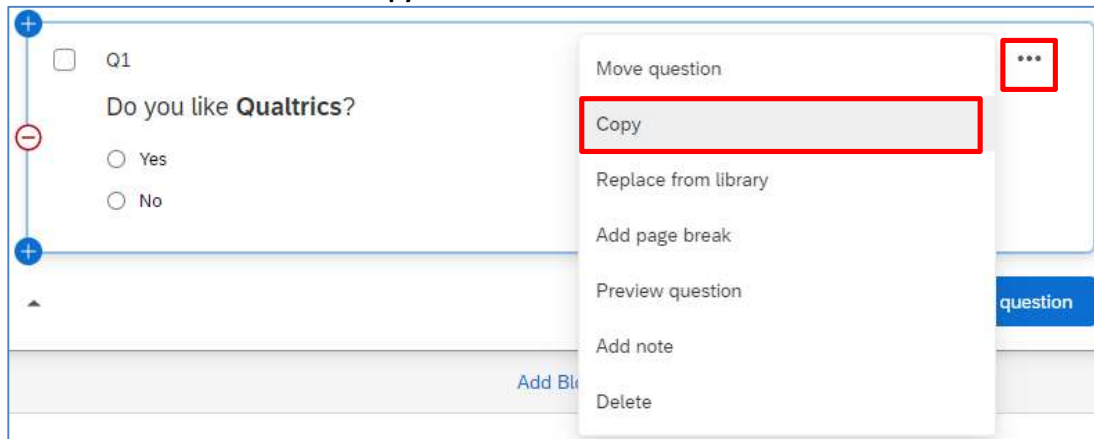


5. If you do not need the questions anymore, you can click the **Empty trash** button to remove all the questions from **Trash**.



## Copy Question from Current Survey

1. Click the “...” button and select **Copy**.



2. The question is copied and is placed below the original question.

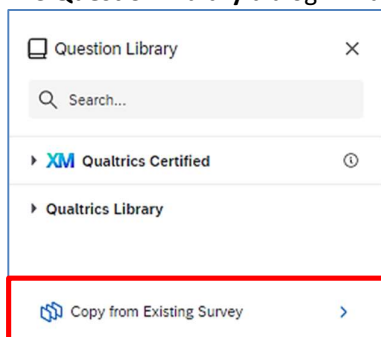


## Import Question from Another Survey / Library

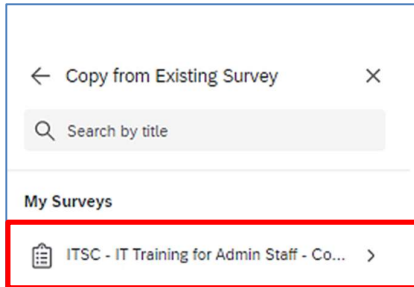
1. Click the **Import from library** button at the bottom of the question block.



2. The **Question Library** dialog will appear on the right menu. Select **Copy from Existing Survey**.



3. Select a survey.



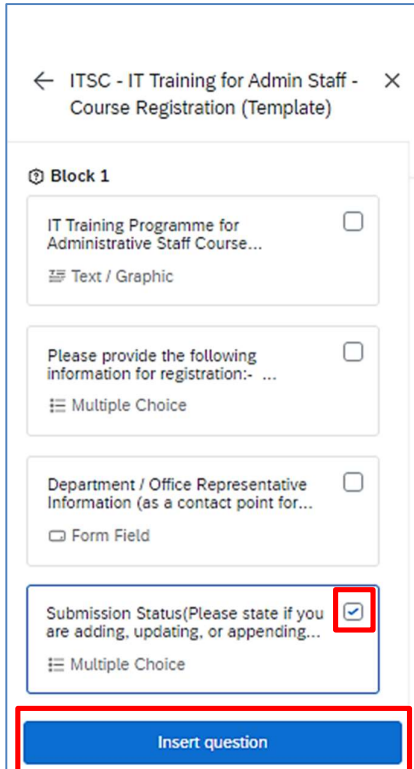
← Copy from Existing Survey ×

🔍 Search by title

My Surveys

📋 ITSC - IT Training for Admin Staff - Co... >

4. Select the survey question(s) and click the **Import question** button.



← ITSC - IT Training for Admin Staff - Course Registration (Template) ×

🔗 Block 1

IT Training Programme for Administrative Staff Course... ☐  
📄 Text / Graphic

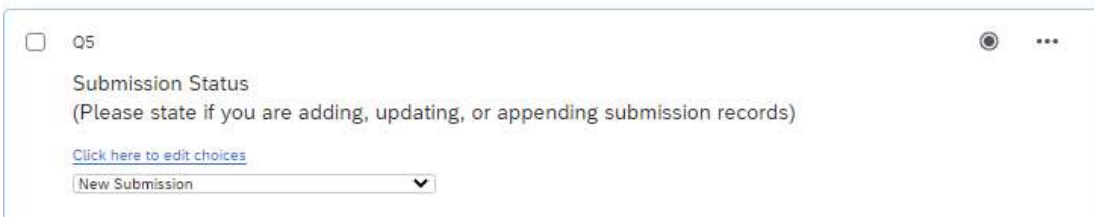
Please provide the following information for registration:- ... ☐  
📄 Multiple Choice

Department / Office Representative Information (as a contact point for... ☐  
📄 Form Field

Submission Status(Please state if you are adding, updating, or appending... ☒  
📄 Multiple Choice

Insert question

5. A copy of the selected question will be added to the survey as the last question.



📄 Q5

Submission Status  
(Please state if you are adding, updating, or appending submission records)

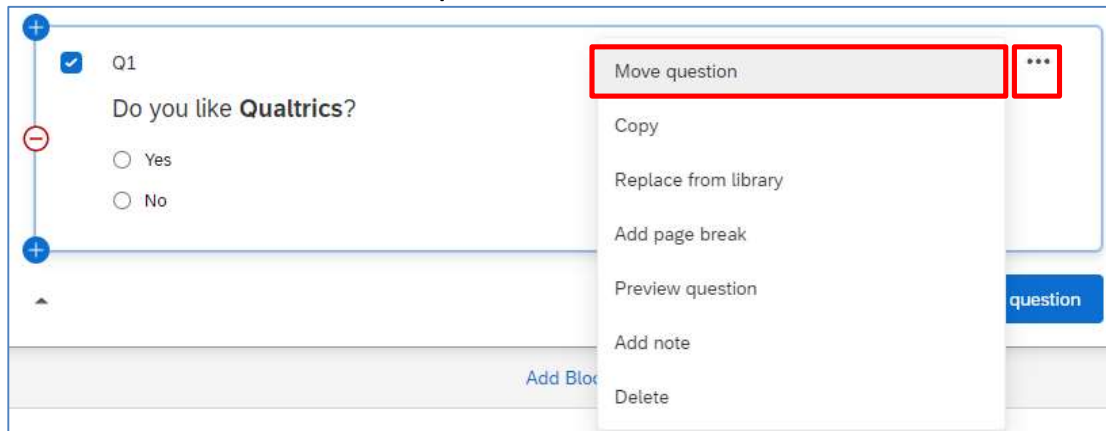
[Click here to edit choices](#)

New Submission ▼

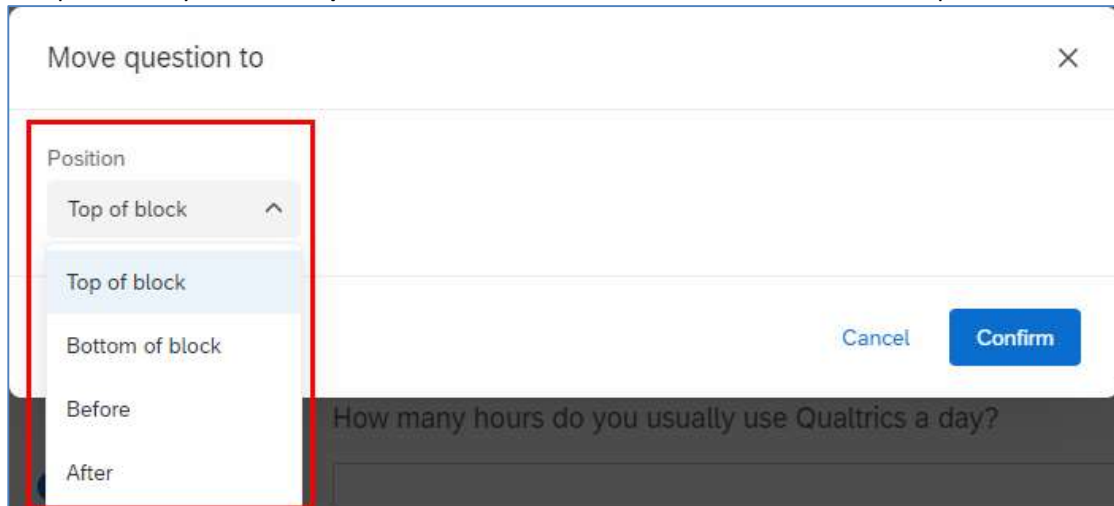


## Move Question

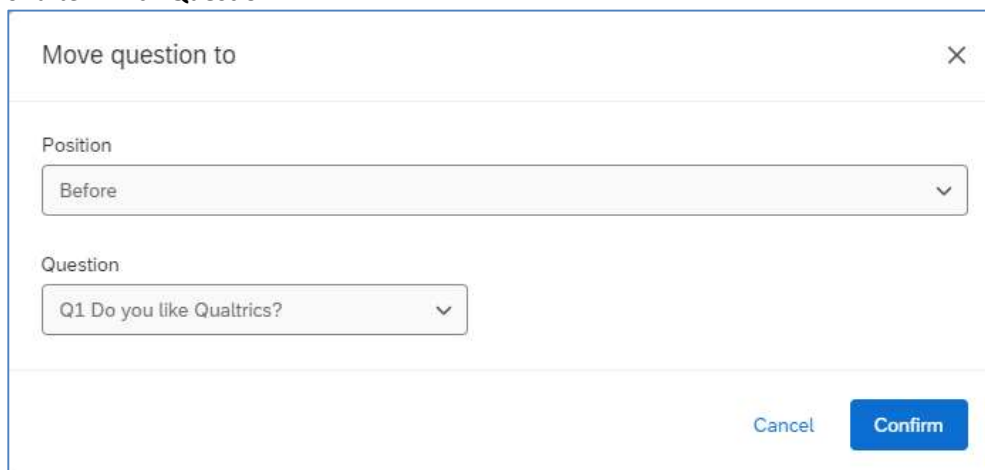
1. Click the “...” button and select **Move question**.



2. The **Move question to** dialog will appear. Click the **Position** dropdown to select the destination of the question. If you select **Top of block** or **Bottom of block**, no further criteria is required.



3. If you select **Before** or **After**, you are required to select the moving question should be place before or after which **Question**.



4. Click the **Confirm** button.

Confirm

5. Q3 is now placed before Q1.

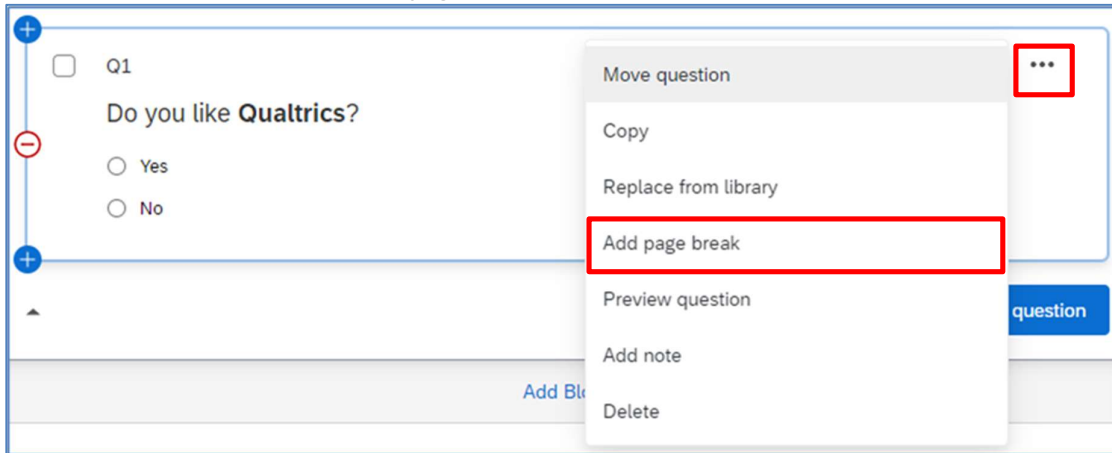
The screenshot shows a survey editor interface. At the top, a question block for 'Q3' is highlighted with a blue border. It contains the text 'Do you like Qualtrics?' and two radio button options: 'Yes' and 'No'. Below this, the question block for 'Q1' is visible, also containing the text 'Do you like Qualtrics?' and 'Yes'/'No' options. The 'Q3' block is positioned above the 'Q1' block, indicating it has been moved to the top of the list.

6. You can also hover the mouse on the question, **drag and drop** the question to the new position.

The screenshot shows a survey editor interface with three question blocks. The top block is 'Q3' (highlighted with a blue border), followed by 'Q1', and then 'Q2' at the bottom. A dark grey tooltip with the text 'Move 1 question' is positioned over the line between 'Q1' and 'Q2', indicating a drag-and-drop action to move 'Q3' down one position. Each question block contains the text 'Do you like Qualtrics?' and 'Yes'/'No' options. The 'Q2' block has the text 'How many hours do you usually use Qualtrics a day?'.

## Add Page Break

1. Click the “...” button and select **Add page break**.



2. A page break will be added after the question.

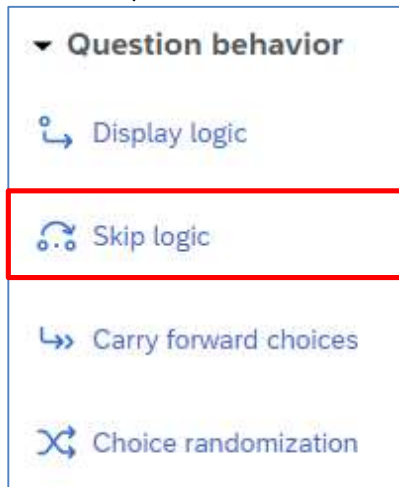


3. You can also hover the mouse on the space between two questions, the **Add page break** link will appear. Click on the link and a page break will be added between the questions.

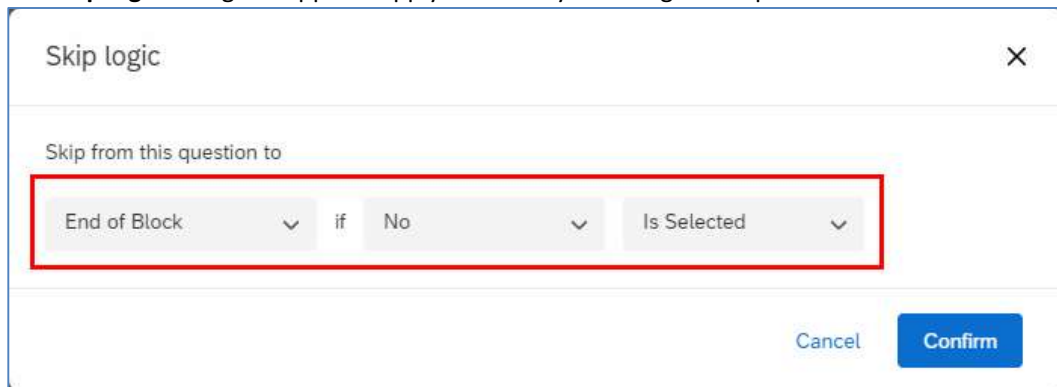


## Add Skip Logic

1. Select the question, scroll to the bottom of **Edit question** pane and click the **Skip logic** link.



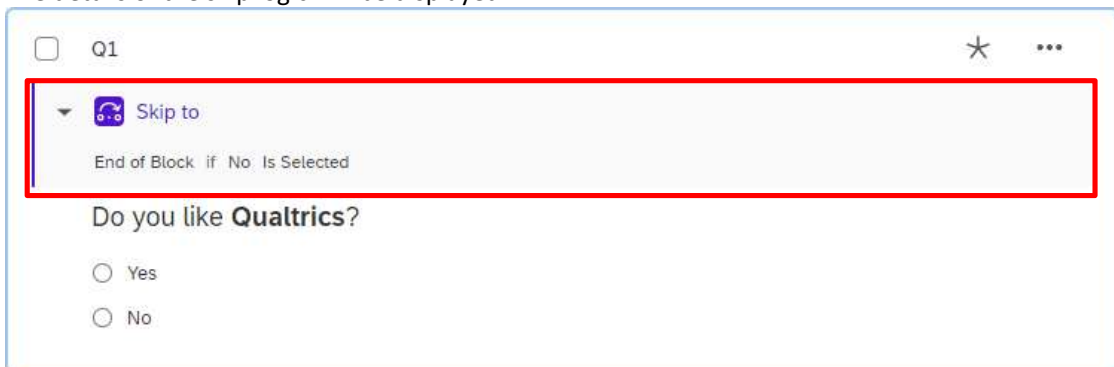
2. The **Skip logic** dialog will appear. Apply the rule by selecting the required criteria.



3. Click the **Confirm** button.



4. The details of the skip logic will be displayed.

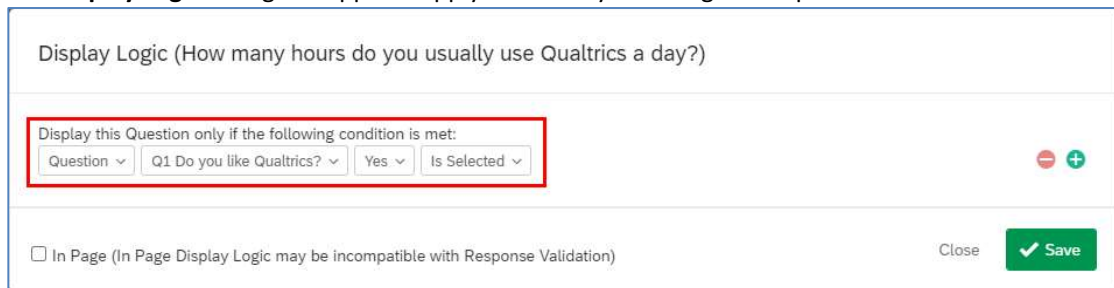


## Add Display Logic

1. Select the question, scroll to the bottom of **Edit question** pane and click the **Display logic** link.



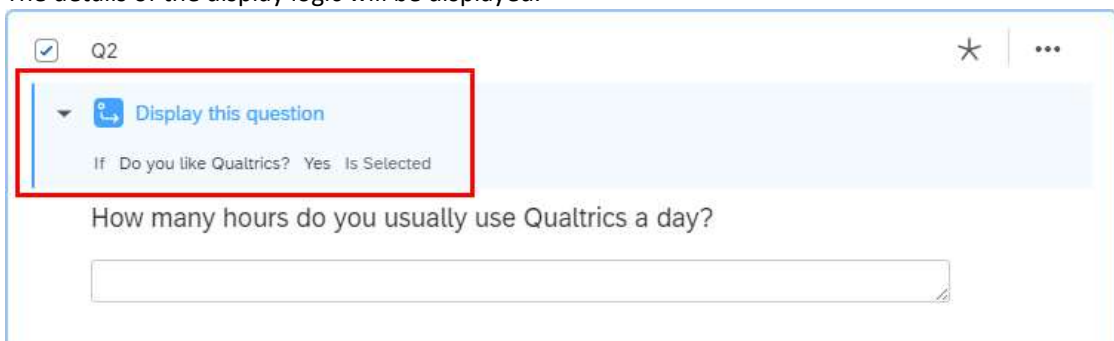
2. The **Display Logic** dialog will appear. Apply the rule by selecting the required criteria.

A screenshot of the 'Display Logic' dialog box. The title is 'Display Logic (How many hours do you usually use Qualtrics a day?)'. Below the title, there is a section titled 'Display this Question only if the following condition is met:'. This section contains four dropdown menus: 'Question', 'Q1 Do you like Qualtrics?', 'Yes', and 'Is Selected'. To the right of these dropdowns are minus and plus icons. At the bottom left, there is a checkbox labeled 'In Page (In Page Display Logic may be incompatible with Response Validation)'. At the bottom right, there are 'Close' and 'Save' buttons. The 'Save' button is green and has a checkmark icon.

3. Click the **Save** button.

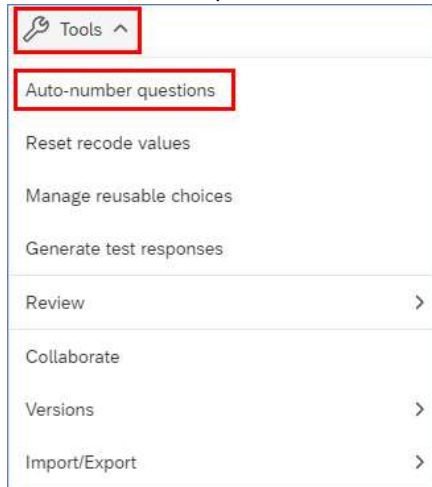


4. The details of the display logic will be displayed.

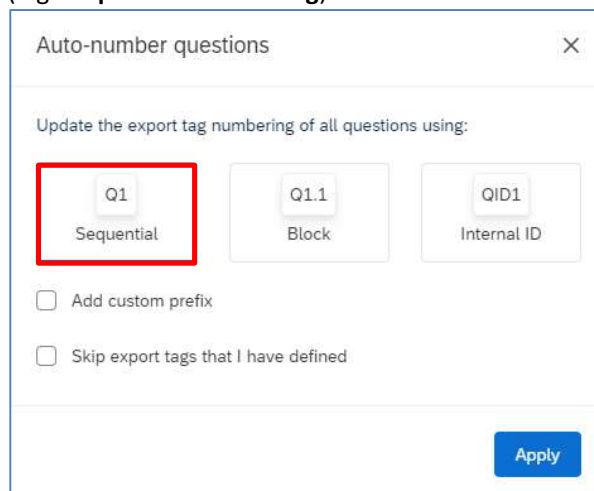
A screenshot of the question details. At the top, there is a checkbox and the label 'Q2'. Below this, there is a section titled 'Display this question' with a blue background. This section contains the condition 'If Do you like Qualtrics? Yes Is Selected'. Below this section, the question text 'How many hours do you usually use Qualtrics a day?' is displayed above a text input field. The 'Display this question' section is highlighted with a red box.

## Auto-Number Questions

1. Click the **Tools** dropdown and select **Auto-number questions**.



2. The **Auto-Number Questions** dialog will appear. Select the number format you prefer for your survey (e.g. **Sequential Numbering**).

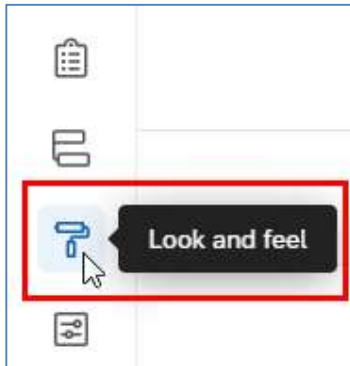


3. The screen will refresh, and the question numbers will be re-ordered.

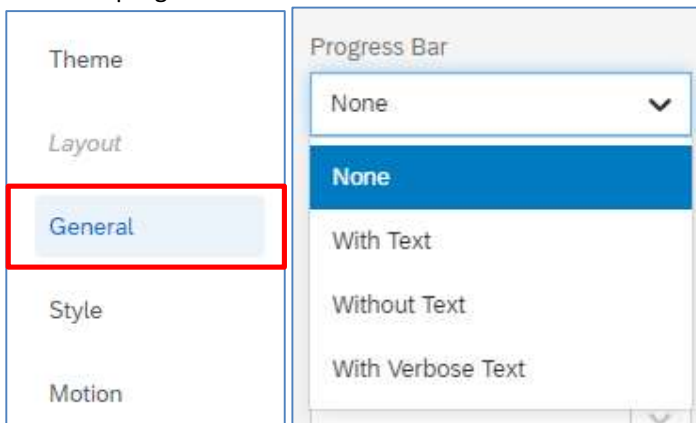


## Show Progress Bar and Change Next / Back Button Text

1. Click the **Look & feel** button at the left side of the **Survey** page.



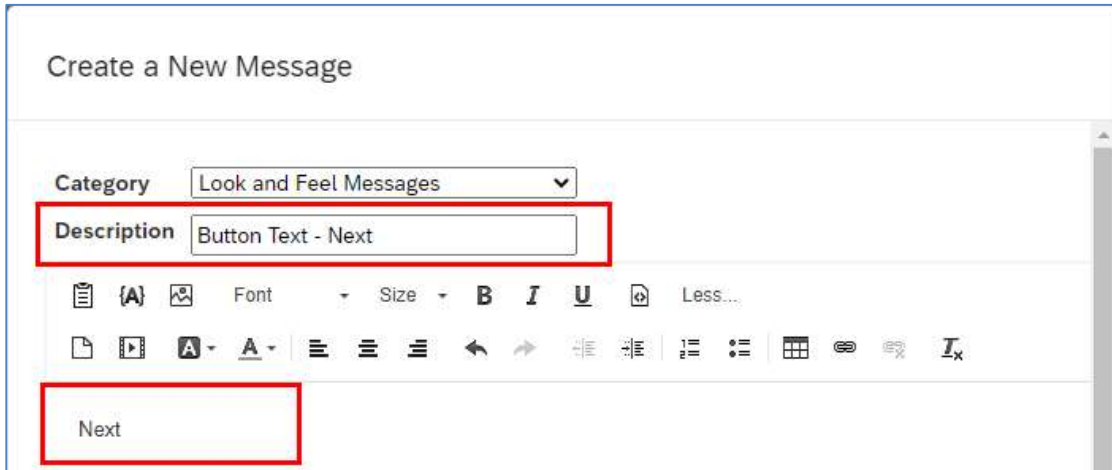
2. The **Look and feel** page will display. Select **General**, click the **Progress Bar** dropdown and select the format of progress bar.



3. Click the **Next Button Text** dropdown. Select **My Library > New Message...**



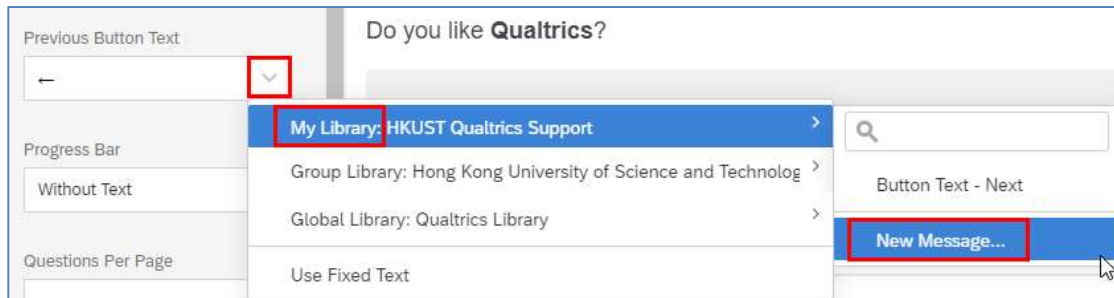
4. The **Create a New Message** dialog will appear. Fill in the **Description** and the **body** of the text message.



5. Click the **Save** button to close the dialog.



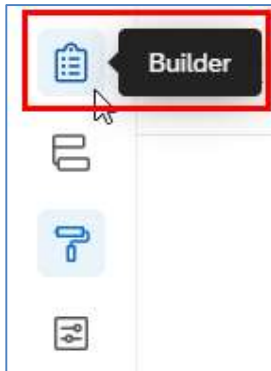
6. It is the same for **Previous Button Text**.



7. Click the **Apply** button.



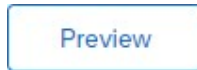
8. Click the **Builder** button to go back to the **Survey** page.



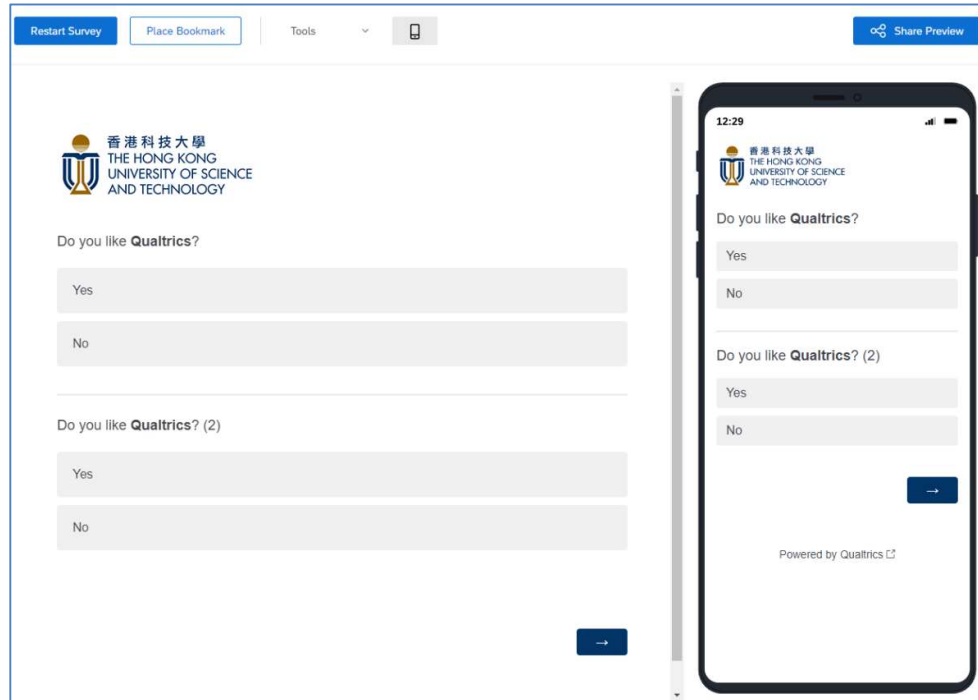


## Preview Survey

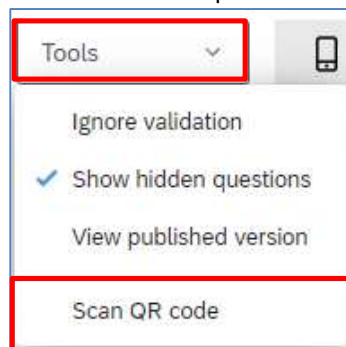
1. Click the **Preview** button.



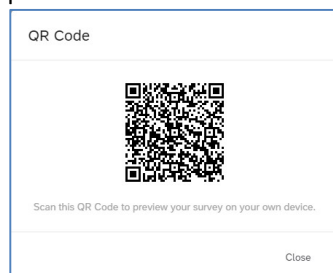
2. A new web tab window will appear, showing the preview of the survey. The left side displays the view for a computer, and the right side displays the view for a smart device.



3. Click the **Tools** dropdown and select **Scan QR code**.



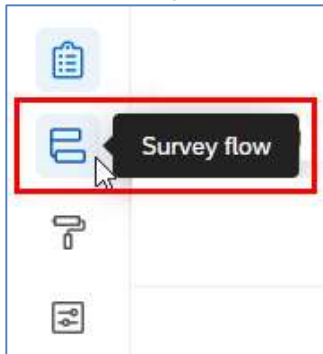
4. The **QR Code** dialog will appear. Scan the QR code with your mobile device to display the survey preview on the device. Click the **Close** button to close the dialog.



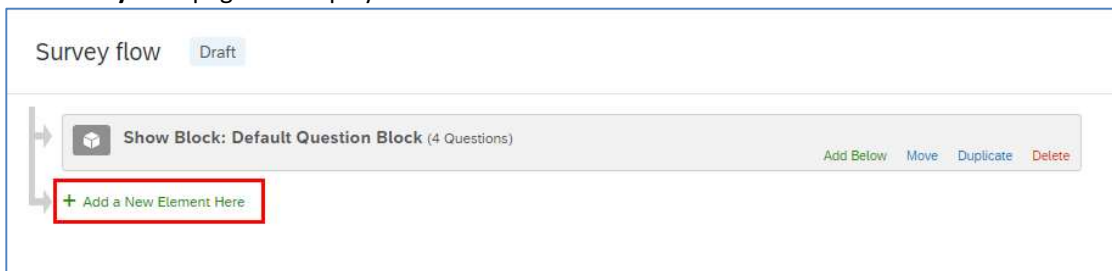
## Setup Authenticator for HKUST Respondents

Sometimes you want to control who can answer the survey, you can use an authenticator to manage it.

1. Click the **Survey flow** button at the **Survey** page.



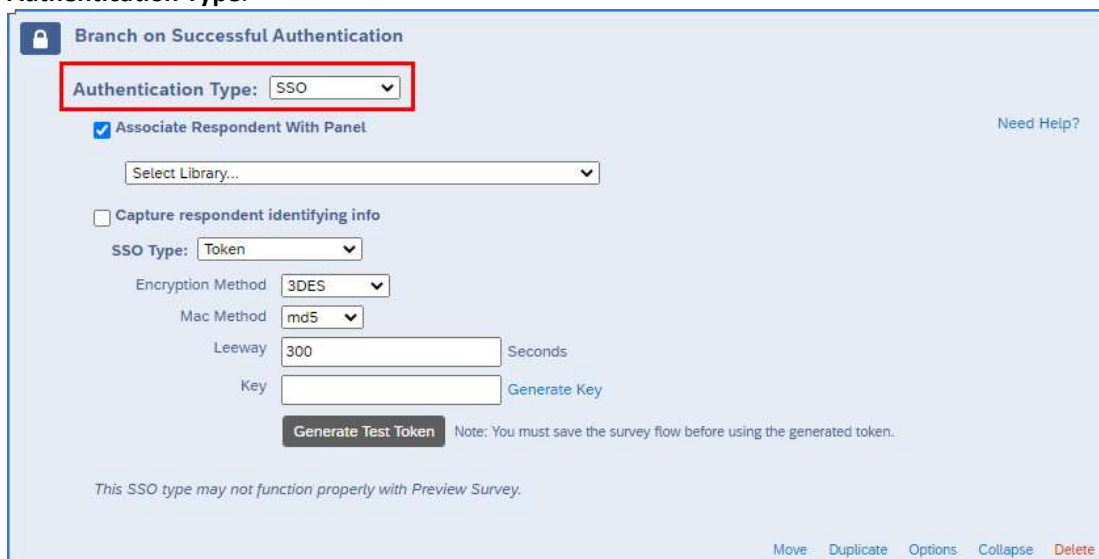
2. The **Survey flow** page will display. Click the **Add a New Element Here** link.



3. Click the **Authenticator** button.



4. If the target respondents of the survey would be any HKUST user, select **SSO** (Single Sign-On) as the **Authentication Type**.



5. Uncheck the **Associate Respondent With Panel** checkbox.

**Branch on Successful Authentication**

Authentication Type: SSO

☐ Associate Respondent With Panel

☐ Capture respondent identifying info

SSO Type: Token

Encryption Method: 3DES

Mac Method: md5

Leeway: 300 Seconds

Key:  [Generate Key](#)

[Generate Test Token](#) Note: You must save the survey flow before using the generated token.

This SSO type may not function properly with Preview Survey.

[Move](#) [Duplicate](#) [Options](#) [Collapse](#) [Delete](#)

6. Select **Shibboleth** as SSO Type and **UST Organization SSO** as connection.

**Branch on Successful Authentication**

Authentication Type: SSO

☐ Associate Respondent With Panel

☐ Capture respondent identifying info

SSO Type: Shibboleth

Connection: UST Organization SSO

This SSO type may not function properly with Preview Survey.

[Move](#) [Duplicate](#) [Options](#) [Collapse](#) [Delete](#)

With this setup (Step 4 – 6), respondents are required to login with their ITSC network account when they take the survey. Respondents with valid ITSC network account would login successfully and can take the survey.

7. If the target respondents of the survey would be a group of HKUST users, besides the above setup (Step 4 – 6), you will need to put the target respondents into a contact list (user group), and associate the contact list with the authenticator.

**Note:** The setup of a contact list will be discussed in the next section.

Check the **Associate Respondent With Panel** checkbox.

**Branch on Successful Authentication**

Authentication Type: SSO

☒ Associate Respondent With Panel

Select Library...

[Need Help?](#)

8. Click the **Select Library...** dropdown and select **My Library**.

Branch on Successful Authentication

Authentication Type: SSO

☒ Associate Respondent With Panel

My Library: Qualtrics Support

Select Contact...

☐ Capture respondent identifying info

SSO Type: Shibboleth

Connection: UST Organization SSO

*This SSO type may not function properly with Preview Survey.*

Move Duplicate Options Collapse Delete

9. Click the **Select Contact...** dropdown and select your **contact list**.

Branch on Successful Authentication

Authentication Type: SSO

☒ Associate Respondent With Panel

My Library: Qualtrics Support

Qualtrics Workshop

Identified By Field(s):

Last Name

First Name

10. Select **External Data Reference** as the **Identified By Field(s)**.

**Note:** When you prepare the contact list, you need to provide the ITSC network account username in the field External Data Reference.

Branch on Successful Authentication

Authentication Type: SSO

☒ Associate Respondent With Panel

My Library: Qualtrics Support

Qualtrics Workshop

Identified By Field(s):

External Data Reference

☐ Capture respondent identifying info

SSO Type: Shibboleth

Connection: UST Organization SSO

*This SSO type may not function properly with Preview Survey.*

Move Duplicate Options Collapse Delete

With this setup (Step 4 – 10), respondents are required to login with their ITSC network account when they take the survey. Respondents listed in the contact list with valid ITSC network account would login successfully and can take the survey.

11. **(Optional)** If you want to collect respondents' information without asking them through survey questions, you can check the **Capture respondent identifying info** checkbox. However, only the respondent's **ITSC network account username** would be collected.

**Branch on Successful Authentication**

Authentication Type: SSO

☒ Associate Respondent With Panel [Need Help?](#)

My Library: Qualtrics Support Qualtrics Workshop

Identified By Field(s):

External Data Reference

☒ **Capture respondent identifying info**  
Add Embedded Data...

SSO Type: Shibboleth

Connection: UST Organization SSO

*This SSO type may not function properly with Preview Survey.*

Move Duplicate Options Collapse Delete

Click the **Add Embedded Data...** link.

**Branch on Successful Authentication**

Authentication Type: SSO

☒ Associate Respondent With Panel [Need Help?](#)

My Library: Qualtrics Support Qualtrics Workshop

Identified By Field(s):

External Data Reference

☒ **Capture respondent identifying info**  
**Add Embedded Data...**

SSO Type: Shibboleth

Connection: UST Organization SSO

*This SSO type may not function properly with Preview Survey.*

Move Duplicate Options Collapse Delete

Type **Username** in the **Embedded Data to Set...** field, and **uid** in the **Field From SSO** field.

**Branch on Successful Authentication**

Authentication Type: SSO

☒ Associate Respondent With Panel [Need Help?](#)

My Library: Qualtrics Support Qualtrics Workshop

Identified By Field(s):

External Data Reference

☒ Capture respondent identifying info

username = uid

SSO Type: Shibboleth

Connection: UST Organization SSO

*This SSO type may not function properly with Preview Survey.*

Move Duplicate Options Collapse Delete

12. Hover the mouse on the word **Move** at the right side of the Question Block. The mouse icon will change to a cross.

**Show Block: Default Question Block (1 Question)**

[Add Below](#) **Move** [Duplicate](#) [Delete](#)

**Branch on Successful Authentication**

Authentication Type: SSO

☒ Associate Respondent With Panel [Need Help?](#)

My Library: Qualtrics Support Qualtrics Workshop

Identified By Field(s):

External Data Reference

☒ Capture respondent identifying info

username = uid

SSO Type: Shibboleth

Connection: UST Organization SSO

*This SSO type may not function properly with Preview Survey.*

Move Duplicate Options Collapse Delete

+ Add a New Element Here

+ Add a New Element Here

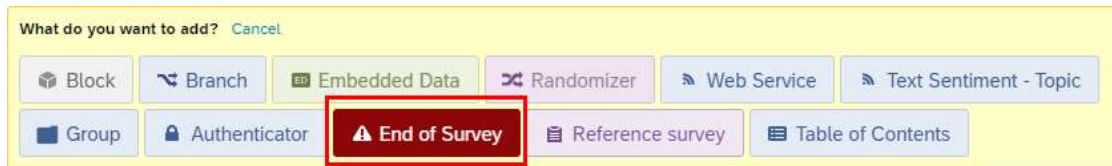
13. **Drag and drop** the Question Block to the sub-level of the Authenticator.

14. The question block is now placed a level below the Authenticator.

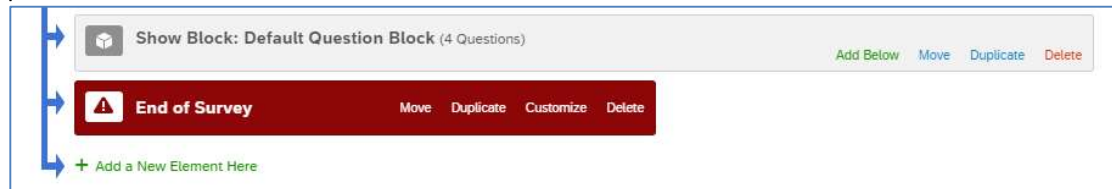
**Note:** Be aware that the Authenticator should always be at the top level of the survey flow.

15. Click the **Add a New Element Here** link below the Question Block.

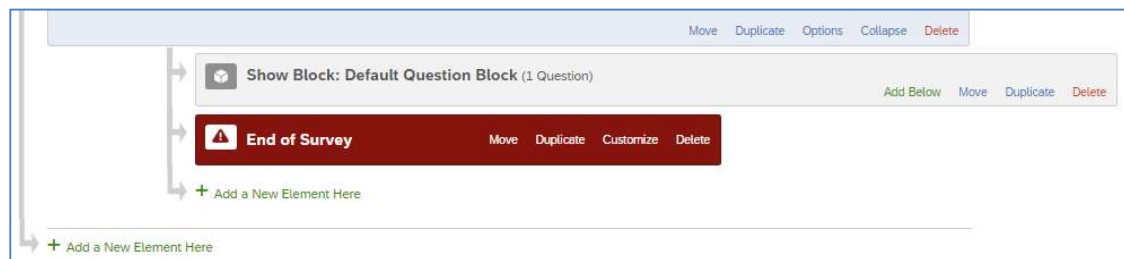
16. Click the **End of Survey** button.



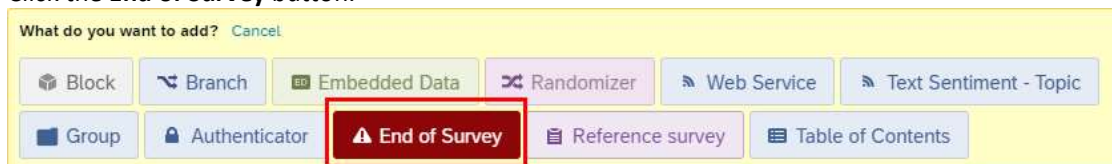
17. An **End of Survey** block is added. When a respondent submits a survey, the survey will end at this point.



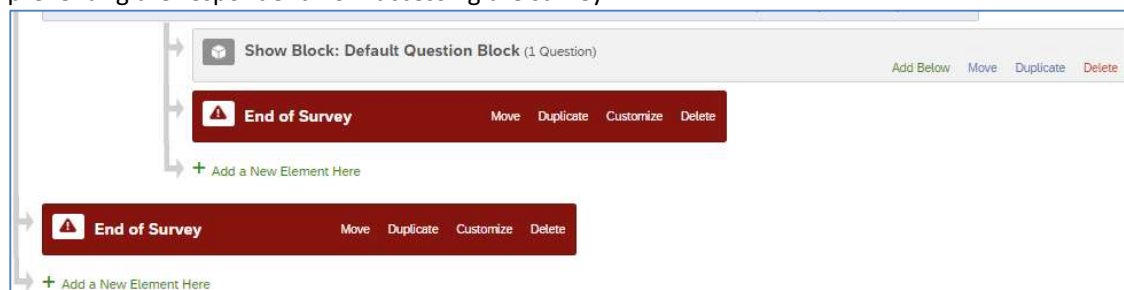
18. Click the last **Add a New Element Here** link.



19. Click the **End of Survey** button.



20. An **End of Survey** block is added. When a respondent fails to login, the survey will end at this point, preventing the respondent from accessing the survey.



21. Click the **Apply** button.



22. Click the **Builder** button to go back to the **Survey** page.

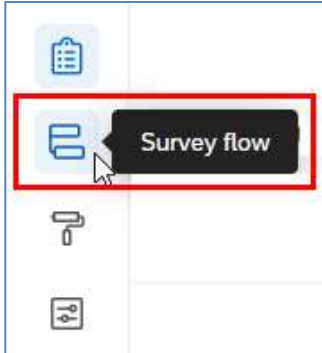




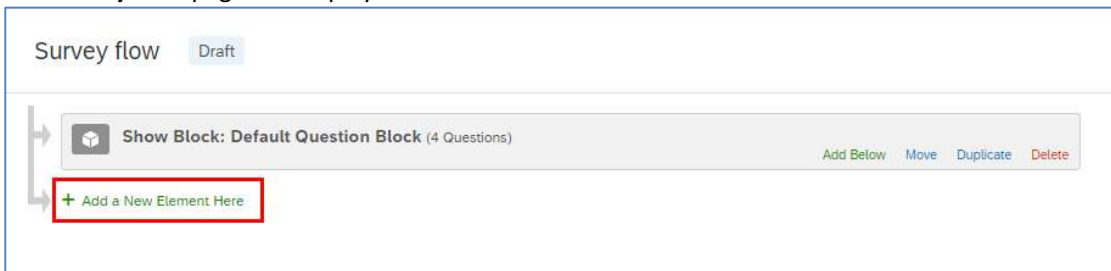
## Setup Authenticator for Non-HKUST Respondents

If the target respondents of the survey would be specified non-HKUST users, you can also setup a contact list and an authenticator to manage it.

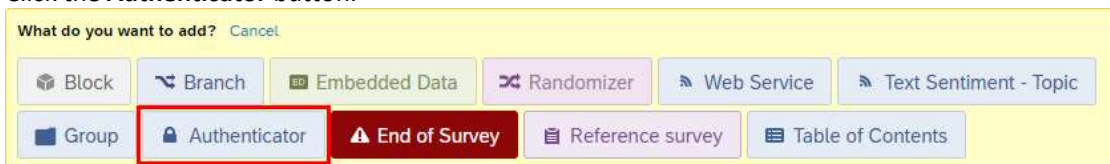
1. Click the **Survey flow** button at the **Survey** page.



2. The **Survey flow** page will display. Click the **Add a New Element Here** link.



3. Click the **Authenticator** button.



4. Select **Contact** as the **Authentication Type**.

Branch on Successful Authentication

Authentication Type: **Contact**

Authenticate Using Contact

Select Library...

Move Duplicate Options Collapse Delete

5. Click the **Select Library...** dropdown and select **My Library**.

Branch on Successful Authentication

Authentication Type: Contact

Authenticate Using Contact

My Library: HKUST Qualtrics Support Select Contact...

Move Duplicate Options Collapse Delete

6. Click the **Select Contact...** dropdown and select your **contact list**.

Branch on Successful Authentication

Authentication Type: Contact

Authenticate Using Contact

My Library: HKUST Qualtrics Support Qualtrics Workshop

Authentication Fields

Contacts Field... Optional Label... ☐ Password ☐ Pre-fill +

Move Duplicate Options Collapse Delete

7. Click the **Contacts Field...** dropdown, select a field name you use for authentication checking.

Branch on Successful Authentication

Authentication Type: Contact

Authenticate Using Contact

My Library: HKUST Qualtrics Support Qualtrics Workshop

Authentication Fields

Email Optional Label... ☐ Password ☐ Pre-fill +

Move Duplicate Options Collapse Delete

With this setup, respondents are required to login with specified authentication field(s) when they take the survey. Respondents listed in the contact list with valid authentication information would login successfully and can take the survey.

8. **(Optional)** Check the **Password** checkbox, so that when user enters the required information for authentication, the characters entered will be displayed as dots.

**Branch on Successful Authentication**

Authentication Type:

**Authenticate Using Contact**


My Library: HKUST Qualtrics Support

**Authentication Fields**

Email  ☒ **Password** ☐ Pre-fill

Move Duplicate Options Collapse Delete

9. Hover the mouse on the word **Move** at the right side of the Question Block. The mouse icon will change to a cross.

Show Block: Default Question Block (4 Questions) Add Below  Duplicate Delete

Branch on Successful Authentication

10. **Drag and drop** the Question Block to the sub-level of the Authenticator.

Branch on Successful Authentication

Authentication Type:

**Authenticate Using Contact**

My Library: HKUST Qualtrics Support

**Authentication Fields**

Email  ☒ Password ☐ Pre-fill

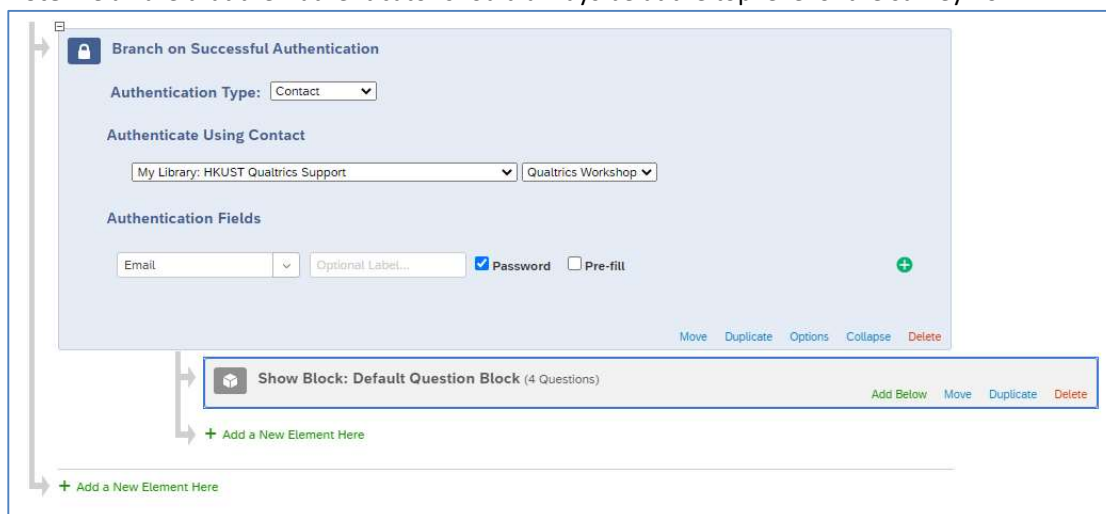
Move Duplicate Options Collapse Delete

+ Add a New Element Here Drag and Drop to the desired location.

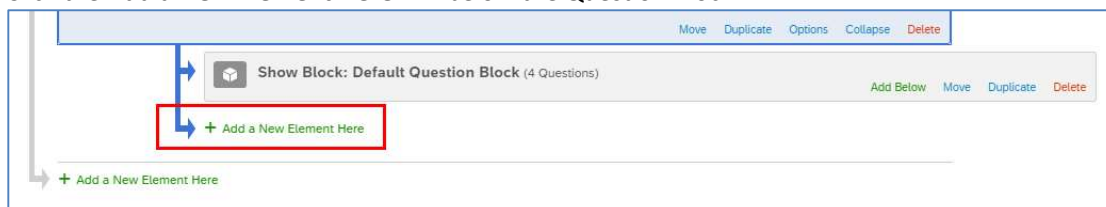
+ Add a New Element Here

11. The question block is now placed a level below the Authenticator.

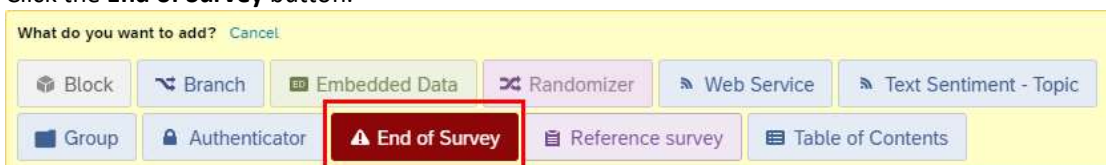
**Note:** Be aware that the Authenticator should always be at the top level of the survey flow.



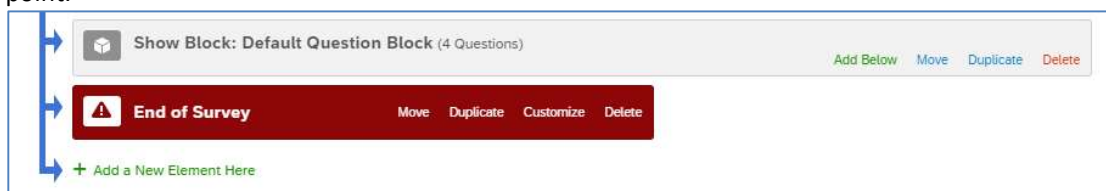
12. Click the **Add a New Element Here** link below the Question Block.



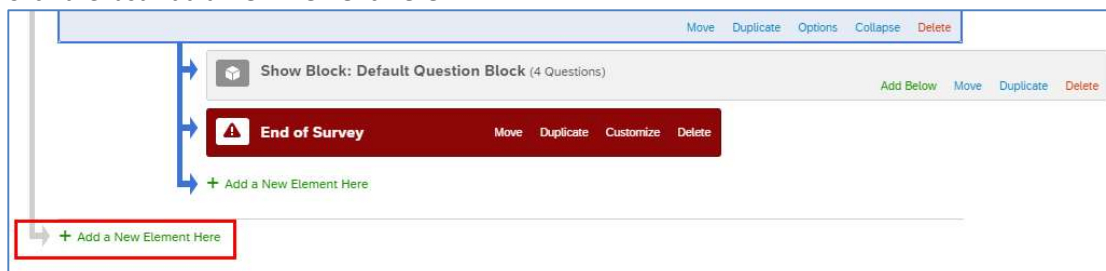
13. Click the **End of Survey** button.



14. An **End of Survey** block is added. When a respondent submits a survey, the survey will end at this point.



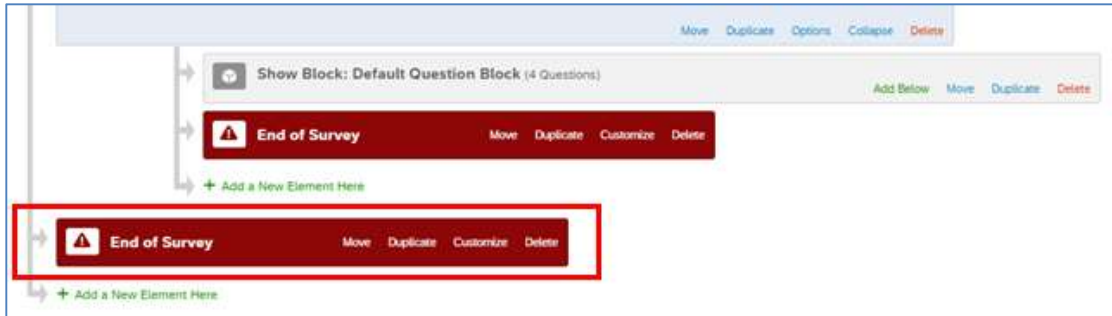
15. Click the last **Add a New Element Here** link.



16. Click the **End of Survey** button.



17. An **End of Survey** block is added. When a respondent fails to login, the survey will end at this point, preventing the respondent from accessing the survey.



18. Click the **Apply** button.



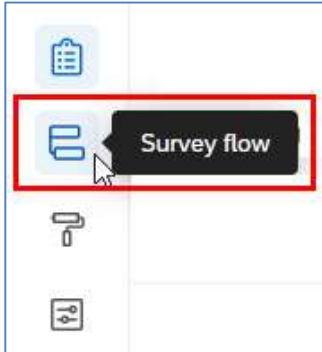
19. Click the **Builder** button to go back to the **Survey** page.



## Allow Respondent to Resume Non-Completed Survey

With the contact list setup in the authenticator, you can also allow the target respondents resuming their non-completed survey, until it is completed. The system would count it as one completed response from the respondent.

1. Click the **Survey flow** button at the **Survey** page.



2. The **Survey flow** page will display. Click the **Options** link at the **Authenticator** block.

A screenshot of the 'Survey flow' page. At the top, there is a section titled 'Branch on Successful Authentication' with a lock icon. Below this, there is a dropdown menu for 'Authentication Type' set to 'SSO'. A checkbox labeled 'Associate Respondent With Panel' is checked. To the right of this checkbox is a link that says 'Need Help?'. Below the checkbox are two dropdown menus: 'My Library: HKUST Qualtrics Support' and 'Qualtrics Workshop'. Underneath these is a section labeled 'Identified By Field(s):' with a dropdown menu set to 'External Data Reference' and a green plus icon to its right. Further down is a checkbox labeled 'Capture respondent identifying info' which is unchecked. Below this is a dropdown menu for 'SSO Type' set to 'Use Brand Settings'. A note below this says 'This will use the organization's current CAS settings.' and another note below that says 'This SSO type may not function properly with Preview Survey.' At the bottom right of the page, there are five links: 'Move', 'Duplicate', 'Options' (which is highlighted with a red box), 'Collapse', and 'Delete'.

3. The **Options** dialog will appear. Check the **Reload any previously saved progress upon authentication** checkbox.

**Options**

Maximum Authentication Attempts  
3

Authentication Prompt Text  
Please log in. ▾

Authentication Error Text  
Unable to log in with the information provided. ▾

Too Many Failures Error Text  
Too many failed log in attempts. Click next to continue. ▾

☐ Allow authenticating respondents to retake authenticated section

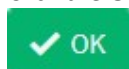
☒ **Reload any previously saved progress upon authentication**

*It is strongly recommended that if you reload saved progress, only one Authenticator exists in the survey flow and that it appears at the beginning of the survey. When reloading the recipient's saved progress, any data prior to authentication will be discarded and replaced with their previously saved data. Additionally, it is recommended that you disable the 'Allow respondents to finish later' option in the Survey Options Menu. This option does not apply to Survey Previews.*

Move authenticator to the beginning of the flow.

☐ Require respondents to authenticate again if they resume their session later

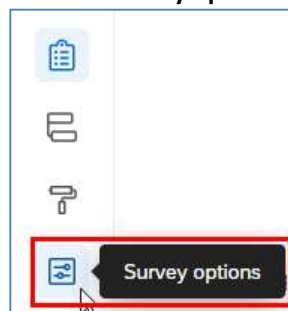
4. Click the **OK** button to close the dialog.



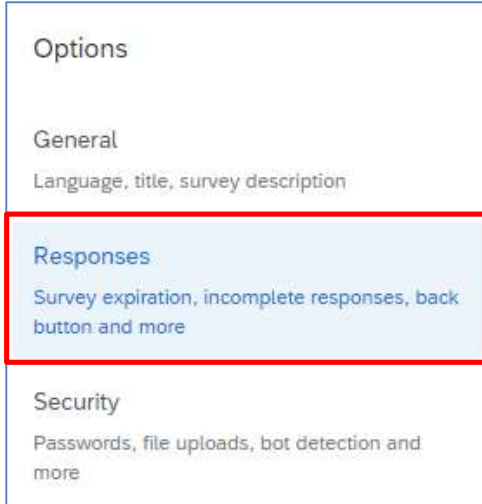
5. Click the **Apply** button to save the survey flow.



6. Click the **Survey options** button.

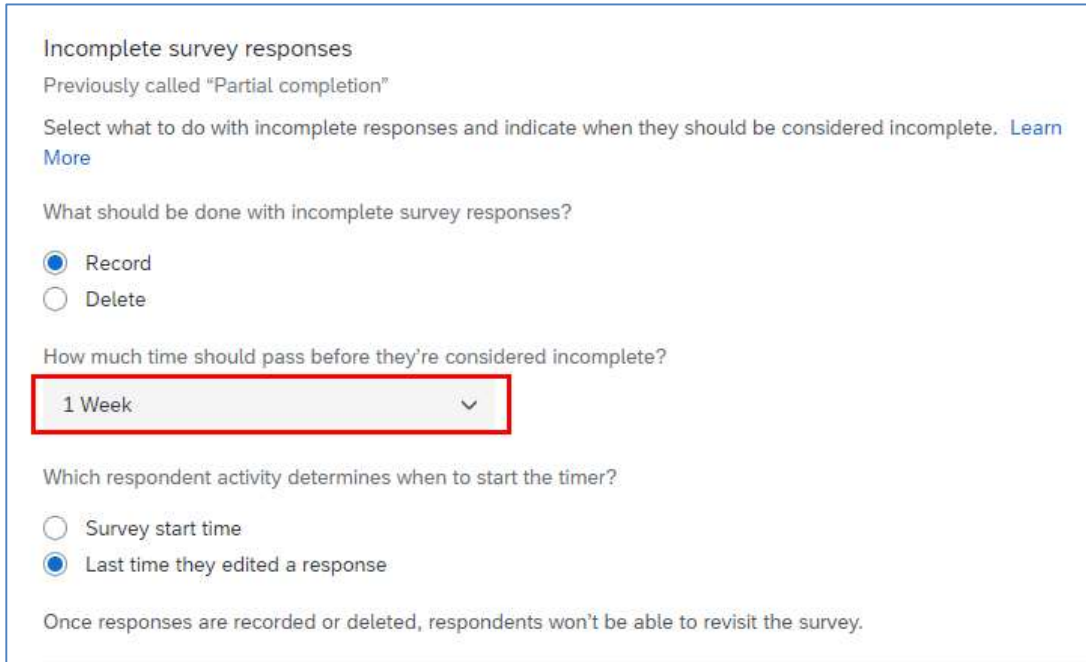


7. The **Options** page will appear. Select **Responses** at the **Options** panel.



The screenshot shows a sidebar menu titled "Options". It contains three sections: "General" (Language, title, survey description), "Responses" (Survey expiration, incomplete responses, back button and more), and "Security" (Passwords, file uploads, bot detection and more). The "Responses" section is highlighted with a red rectangular border.

8. At **Incomplete survey responses**, click the **How much time should pass before they're considered incomplete?** dropdown to select the **period** for keeping the non-completed surveys.



The screenshot shows the "Incomplete survey responses" settings page. It includes a title "Incomplete survey responses" with a subtitle "Previously called 'Partial completion'". Below is a description: "Select what to do with incomplete responses and indicate when they should be considered incomplete. [Learn More](#)". A question "What should be done with incomplete survey responses?" has two radio button options: "Record" (selected) and "Delete". Another question "How much time should pass before they're considered incomplete?" has a dropdown menu showing "1 Week", which is highlighted with a red rectangular border. Below this, a question "Which respondent activity determines when to start the timer?" has two radio button options: "Survey start time" and "Last time they edited a response" (selected). At the bottom, a note states: "Once responses are recorded or deleted, respondents won't be able to revisit the survey."

9. Click the **Builder** button to go back to the **Survey** page.

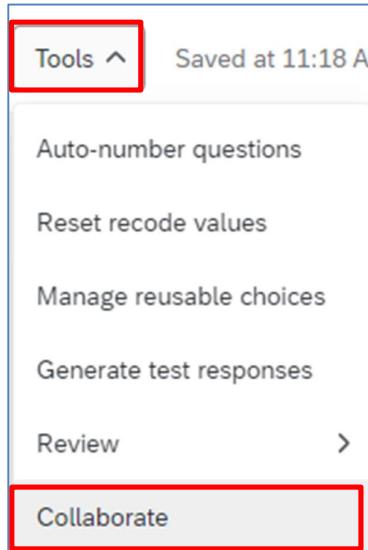




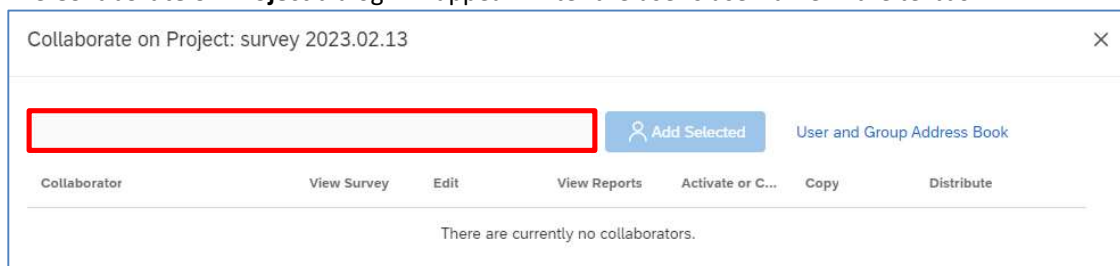
## Collaborate Survey

**Important Note:** If you want to share a survey with a colleague, whom does not have a Qualtrics account, you must ask him/her to activate his/her account first before you do the sharing. Otherwise you and your colleague would come across some unexpected problems.

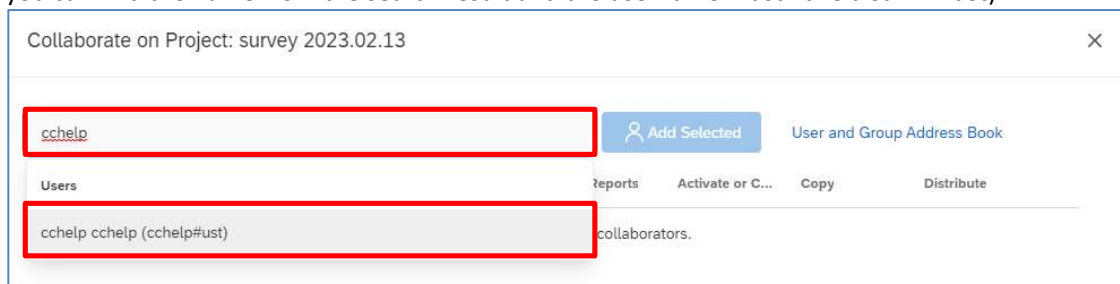
1. At the **Survey** page, click the **Tools** dropdown and select **Collaborate**.



2. The **Collaborate on Project** dialog will appear. Enter the user's username in the textbox.



3. Select the **username** from the search result. You must share your survey to a **valid Qualtrics user** (i.e. you can find the name from the search result and the username must have a **suffix #ust**).



4. Click the **Add Selected** button.



5. The **Collaborate with** dialog will appear. Click the **Invite** button. It will send an email to notify the user that you want to collaborate a survey with him/her.

Invite to collaborate

Share this project with **cchelp**.

Custom Message (Optional)  


Type message

[Learn more about collaborating outside your organization](#)

Cancel

Invite

6. The selected user will be listed in the table below. Check the checkboxes to share different rights to the user.

Collaborator	View Survey	Edit	View Reports	Activate or C...	Copy	Distribute
 cchelp cchelp	<input checked="" type="checkbox"/>	<input type="checkbox"/> ▾	<input type="checkbox"/> ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Click the **Save** button.

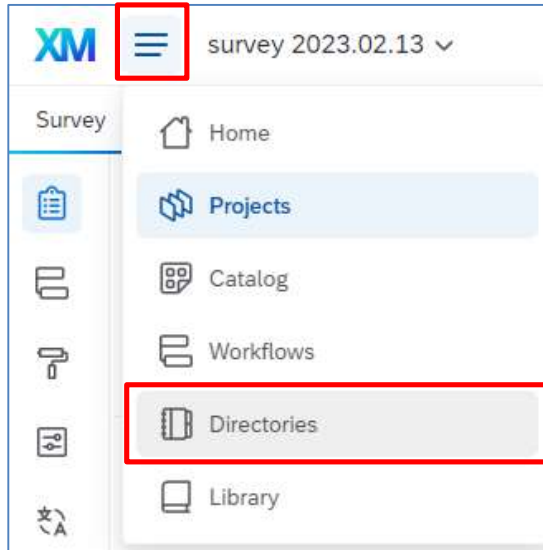


## E. Setup Contacts

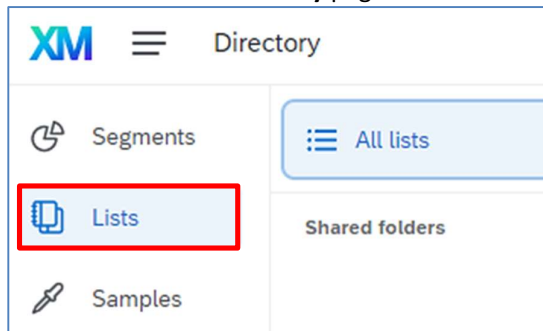
If you have a list of target respondents for your survey, you can create a contact list and make your target respondents be the contact list members.

### Create Contact List

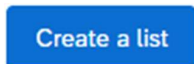
1. Click the **Menu** button and select **Directories**.



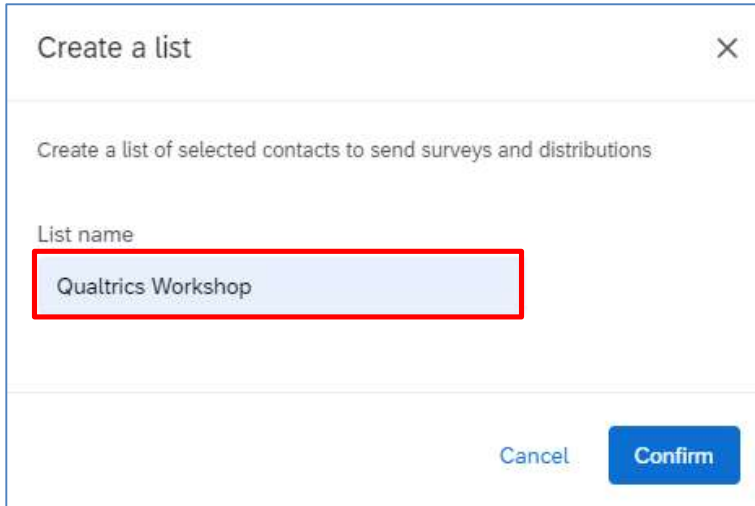
2. It will direct to the **Directory** page. Click **Lists** to display the contact lists.



3. Click the **Create a list** button.



4. The **Create a List** dialog will appear. Enter the **List name**.

A dialog box titled "Create a list" with a close button (X) in the top right corner. Below the title is a subtitle: "Create a list of selected contacts to send surveys and distributions". There is a text input field labeled "List name" containing the text "Qualtrics Workshop". At the bottom right are two buttons: "Cancel" and "Confirm".

Create a list

Create a list of selected contacts to send surveys and distributions

List name

Qualtrics Workshop

Cancel Confirm

5. Click the **Confirm** button.



6. The **Add Contacts** dialog will appear. It shows two ways to add members to the contact list, including **Upload a File** (import a .csv file), and **Manual Input**.

A dialog box titled "Add Contacts" with two main sections. The left section is titled "Upload a File" with a download icon and the text "Add contacts by uploading a file from your computer." The right section is titled "Manual Input" with a pencil icon and the text "Enter manually or copy and paste from a spreadsheet.".

Upload a File

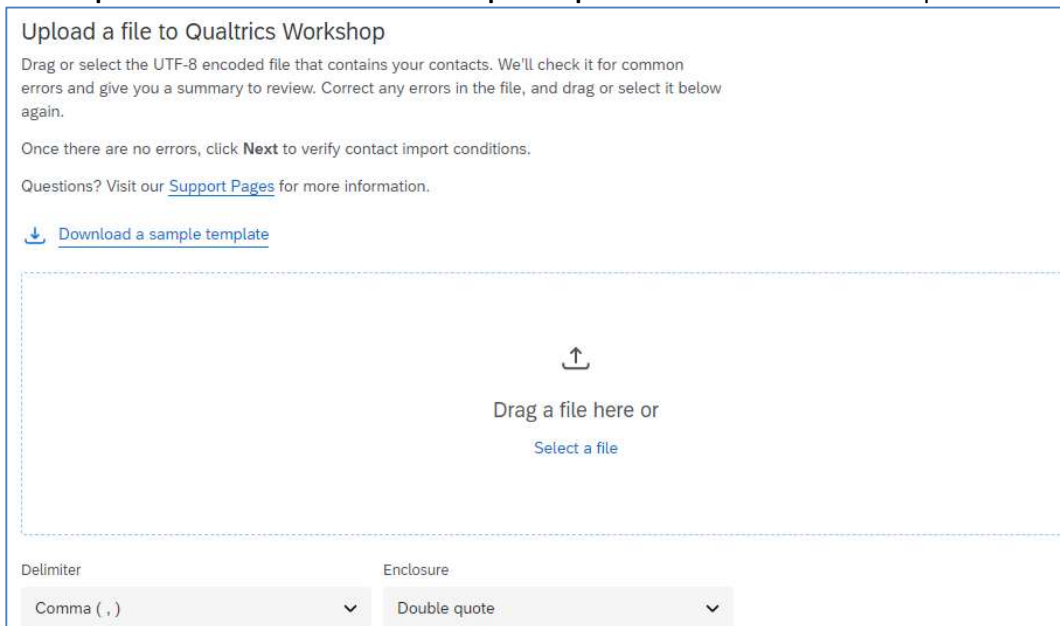
Add contacts by uploading a file from your computer.

Manual Input

Enter manually or copy and paste from a spreadsheet.

## Add Contacts by Uploading a File

1. Select **Upload a File**. Click **Download a sample template** link to download the sample **CSV** file.

A dialog box titled "Upload a file to Qualtrics Workshop". It contains instructions: "Drag or select the UTF-8 encoded file that contains your contacts. We'll check it for common errors and give you a summary to review. Correct any errors in the file, and drag or select it below again." and "Once there are no errors, click **Next** to verify contact import conditions." There is a link "Questions? Visit our [Support Pages](#) for more information." and a link "Download a sample template" with a download icon. Below is a large dashed box for file upload with an upload icon and the text "Drag a file here or" and a link "Select a file". At the bottom are two dropdown menus: "Delimiter" set to "Comma ( , )" and "Enclosure" set to "Double quote".

Upload a file to Qualtrics Workshop

Drag or select the UTF-8 encoded file that contains your contacts. We'll check it for common errors and give you a summary to review. Correct any errors in the file, and drag or select it below again.

Once there are no errors, click **Next** to verify contact import conditions.

Questions? Visit our [Support Pages](#) for more information.

[Download a sample template](#)

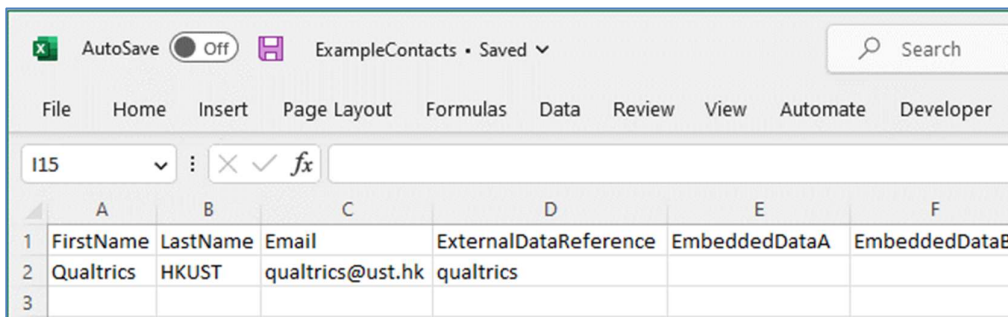
Drag a file here or

[Select a file](#)

Delimiter: Comma ( , )

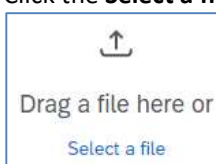
Enclosure: Double quote

2. Update the contents of the CSV file in Excel. **First Name**, **Last Name**, **Email** and **External Data Reference** are mandatory, while External Data Reference should be filled with ITSC network account username. Save and Close the file.

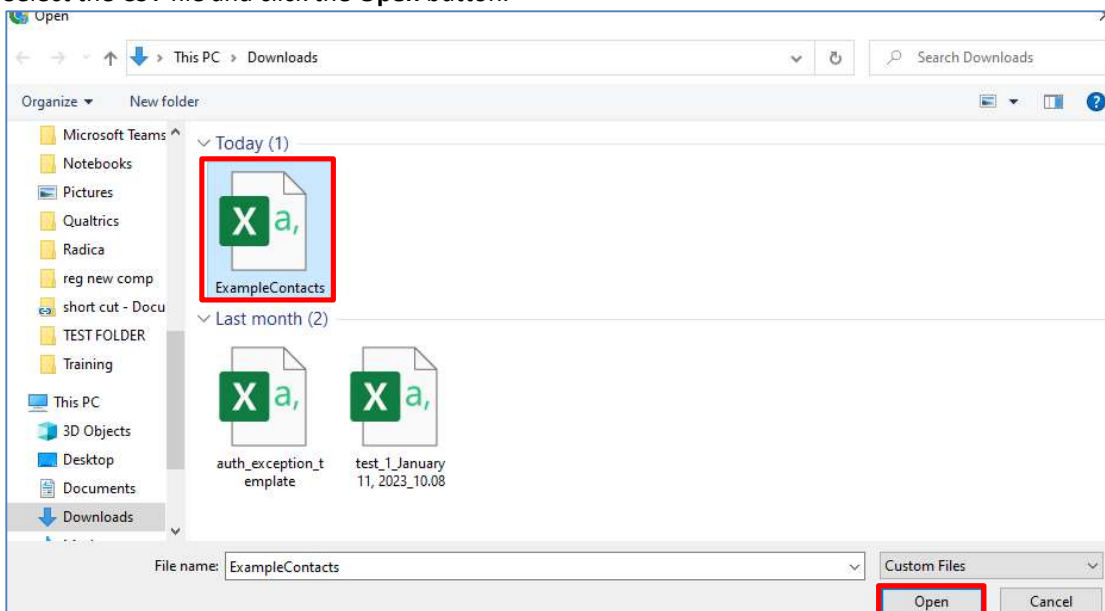


	A	B	C	D	E	F
1	FirstName	LastName	Email	ExternalDataReference	EmbeddedDataA	EmbeddedDataB
2	Qualtrics	HKUST	qualtrics@ust.hk	qualtrics		
3						

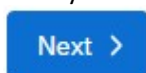
3. Click the **Select a file** link.



4. Select the CSV file and click the **Open** button.



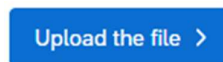
5. After you have uploaded the file, click **Next**.



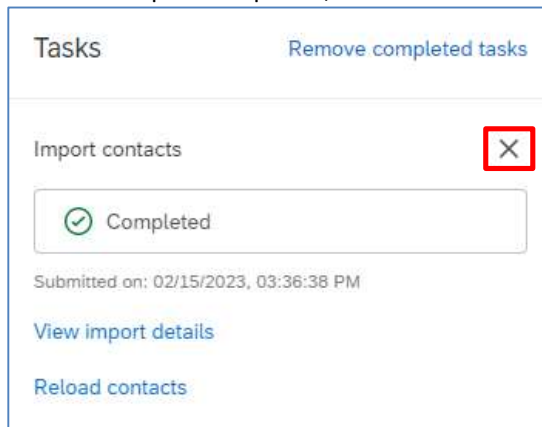
6. Scroll down and verify the fields displayed in the dialog. Select **Exclude from Import** for the fields **EmbeddedDataA** and **EmbeddedDataB**.

Field in your file	Import as field	First Contact
FirstName	First name	Qualtrics
LastName	Last name	HKUST
Email	Email	qualtrics@ust.hk
ExternalDataReference	External data reference	qualtrics
EmbeddedDataA	Exclude from import	
EmbeddedDataB	Exclude from import	

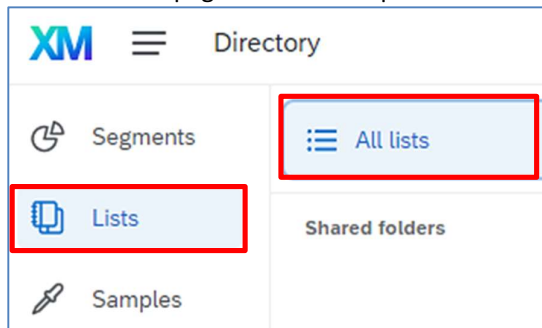
7. Click the **Upload the file** button.



8. When the import completed, click the **cross** button to close the task.

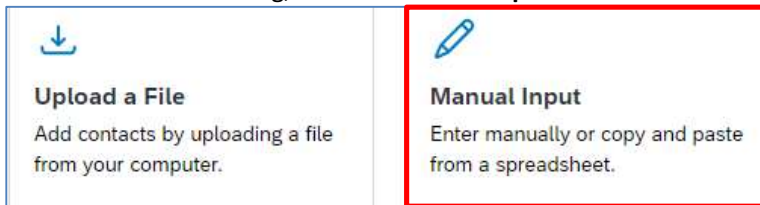


9. Go to the **Lists** page to view the uploaded list.



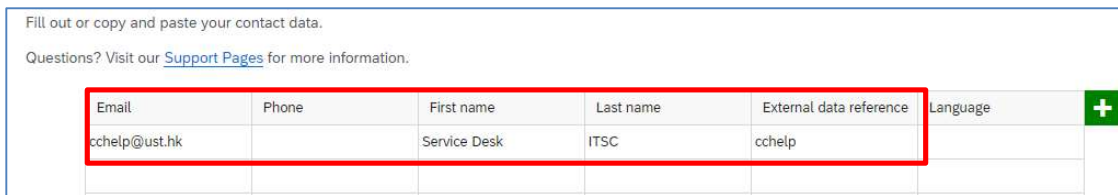
## Add Contacts Manually

1. In the **Create a list** dialog, click the **Manual Input** button.



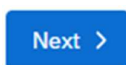
The screenshot shows a dialog with two main sections. The left section is titled 'Upload a File' and contains the text 'Add contacts by uploading a file from your computer.' The right section is titled 'Manual Input' and contains the text 'Enter manually or copy and paste from a spreadsheet.' The 'Manual Input' section is highlighted with a red rectangular border.

2. The **Add Contacts** dialog will display a table. Follow the column headers to add necessary information into the table. **Email**, **First Name**, **Last Name** and **External Data Reference** are mandatory, while External Data Reference should be filled with ITSC network account username.



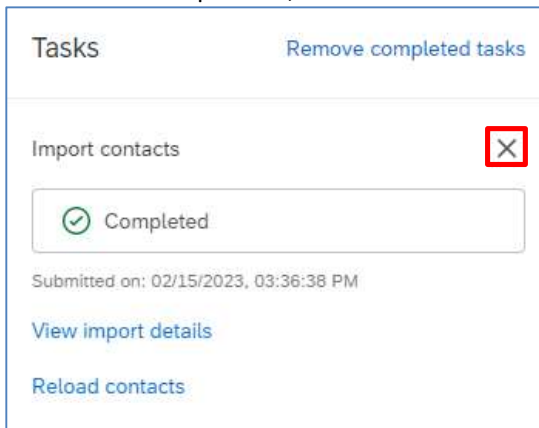
The screenshot shows a table with the following columns: Email, Phone, First name, Last name, External data reference, and Language. The first row contains the following data: cchelp@ust.hk, Service Desk, ITSC, cchelp. The 'External data reference' column is highlighted with a red rectangular border.

3. Click the **Next** button.



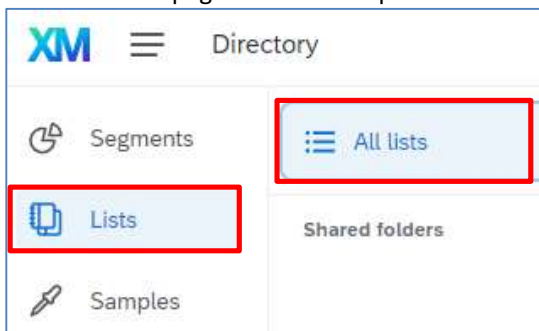
A blue button with the text 'Next >'.

4. When the list is uploaded, click the **cross** button to close the task.



The screenshot shows a 'Tasks' dialog with a task titled 'Import contacts'. The task status is 'Completed'. A red rectangular box highlights the close button (X) in the top right corner.

5. Go to the **Lists** page to view the uploaded list.



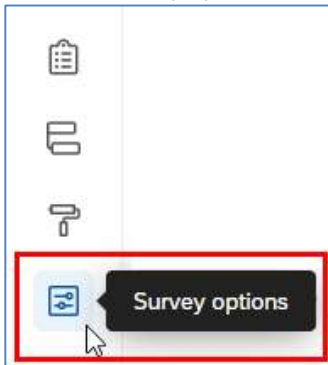
The screenshot shows a 'Directory' page with a sidebar containing 'Segments', 'Lists', and 'Samples'. The 'Lists' section is highlighted with a red rectangular box. The 'All lists' button is also highlighted with a red rectangular box.

## F. Distribute Survey

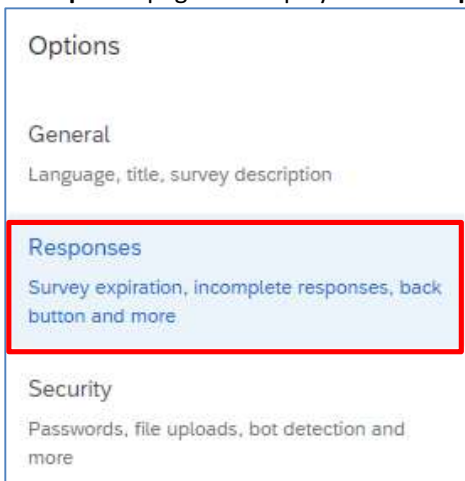
A survey must be active before you can collect data from respondents. An active survey would have a survey link, you can send the survey link to the respondents through email. You can also use other social media to distribute your survey to the respondents.

### Set Survey Availability

1. Click the **Survey options** button at the **Survey** page.



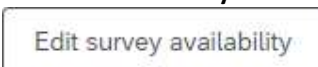
2. The **Options** page will display. Select **Responses** from the **Options** pane.



3. Check the **Set specific start and expiration date** checkbox at **Survey availability**.

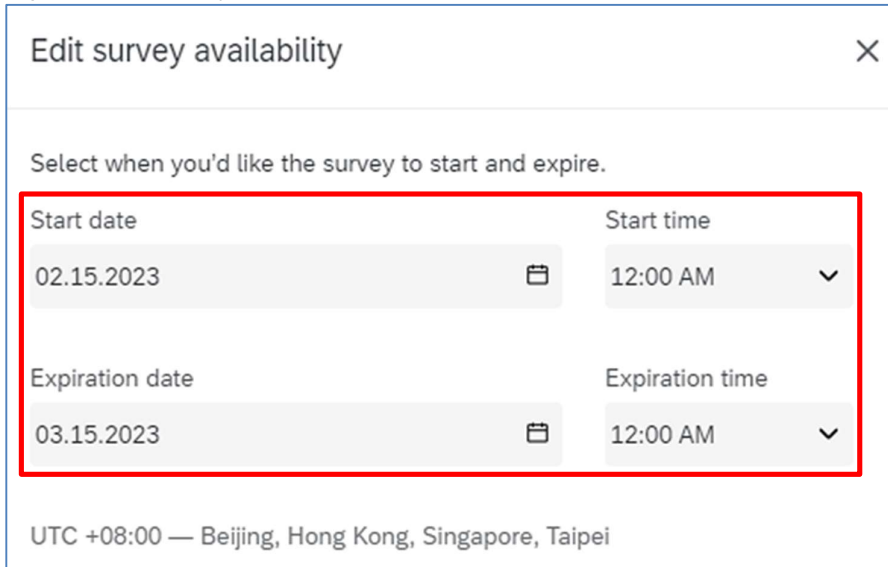


4. Click the **Edit survey availability** button.

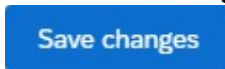




5. The **Edit survey availability** dialog will appear. Update the **Start date**, **Start time**, **Expiration date** and **Expiration time** as you need.



6. Click the **Save changes** button.

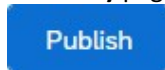


7. Click the **Builder** button to go back to the **Survey** page.

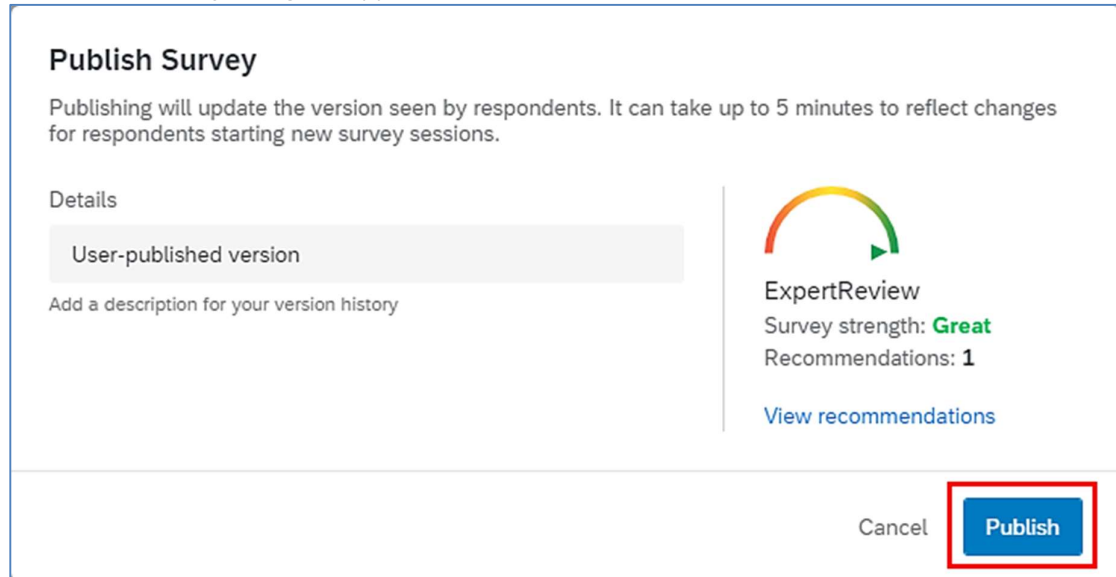


## Activate Survey

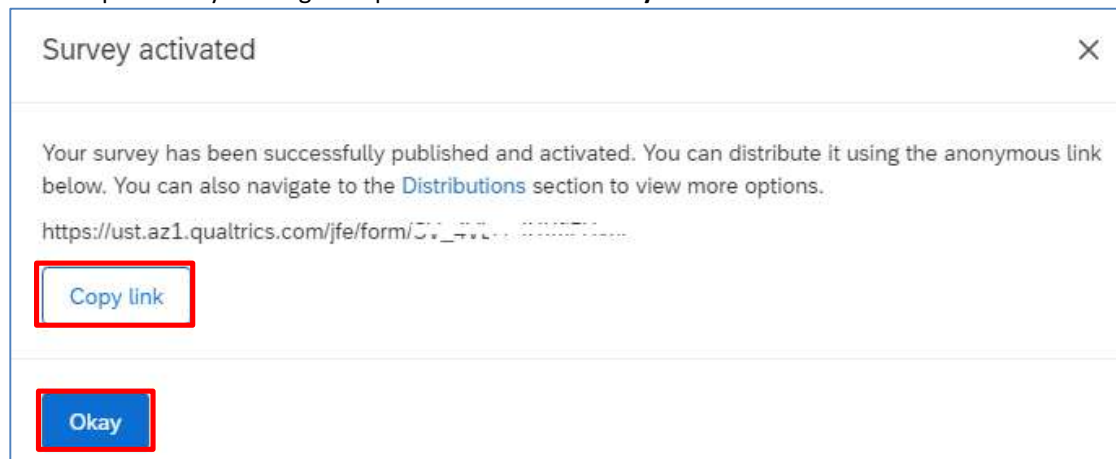
1. At **Survey** page, click the **Publish** button.



2. The **Publish Survey** dialog will appear. Click the **Publish** button.

The "Publish Survey" dialog box. It has a title "Publish Survey" and a subtitle "Publishing will update the version seen by respondents. It can take up to 5 minutes to reflect changes for respondents starting new survey sessions." Below the subtitle, there is a "Details" section with a text input field containing "User-published version" and a placeholder "Add a description for your version history". To the right of the details, there is a "ExpertReview" section with a rainbow arc icon, the text "Survey strength: Great", "Recommendations: 1", and a link "View recommendations". At the bottom right, there are two buttons: "Cancel" and "Publish". The "Publish" button is highlighted with a red rectangle.

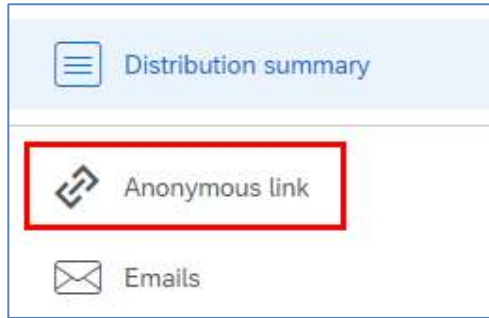
3. The **Survey Activated** dialog will appear. The survey link is displayed in the dialog. You may copy the link and pass it to your target respondents. Click the **Okay** button.

The "Survey activated" dialog box. It has a title "Survey activated" and a close button (X) in the top right corner. The main text says "Your survey has been successfully published and activated. You can distribute it using the anonymous link below. You can also navigate to the [Distributions](#) section to view more options." Below the text, there is a URL: "https://ust.az1.qualtrics.com/jfe/form/SV\_44L...". Below the URL, there is a "Copy link" button, which is highlighted with a red rectangle. At the bottom left, there is an "Okay" button, which is also highlighted with a red rectangle.

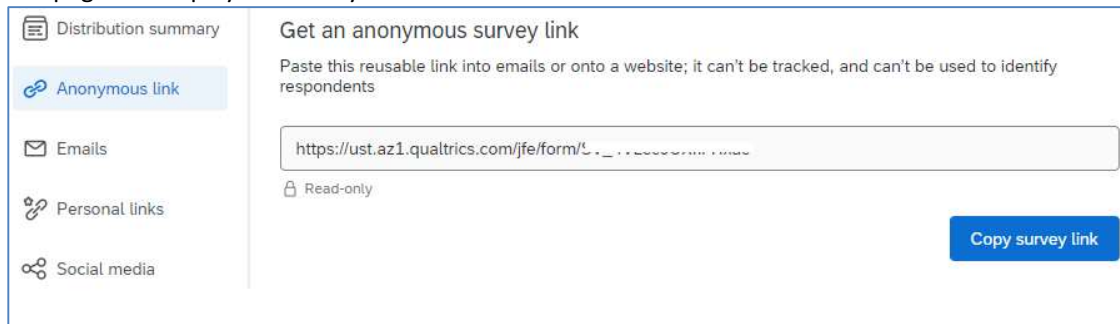
4. Once the survey is activated, you can always go to the **Distributions** page to retrieve the survey link. Click the **Distributions** tab.

A row of navigation tabs: "Survey", "Workflows", "Distributions", "Data & Analysis", "Results", and "Reports". The "Distributions" tab is highlighted with a red rectangle.

5. It will direct to the **Distributions** page. Click **Anonymous link** at the left panel of the page.



6. The page will display the survey link there.



## Distribute Survey through Email

You can send email to your target respondents through Qualtrics, inviting them to take the survey.

**Important Note:** The Email Distribution function is disabled to avoid spam. If you want to use the function, please contact us at [qualtrics@ust.hk](mailto:qualtrics@ust.hk).

1. Click the **Emails** link at the **Distributions** page.



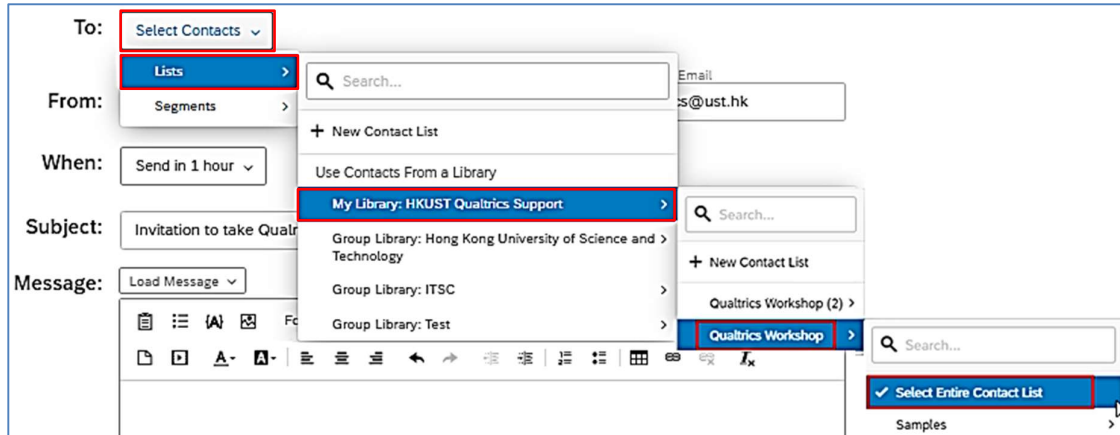
2. Click the **Compose Email** button.



3. The **Compose Email** dialog will appear. Click the **Select Contacts** dropdown at the **To** field.



4. Select **Lists > My Library > Name of Contact List > Select Entire Contact List**.



5. Enter the **From Address**, **From Name**, and **Reply-To Email**.

**Note:** Qualtrics allows us using email address with “@ust.hk” or “@connect.ust.hk” for the From Address.

The screenshot shows the 'From' field in the Qualtrics email creation interface. The 'From Address' is 'qualtrics@ust.hk', the 'From Name' is 'HKUST Qualtrics Support', and the 'Reply-To Email' is 'qualtrics@ust.hk'.

6. Select **When** to send out the survey, e.g. Send Now.

The screenshot shows the 'When' field in the Qualtrics email creation interface. The 'Send Now' option is selected.

7. Enter the **Subject**.

The screenshot shows the 'Subject' field in the Qualtrics email creation interface. The subject is 'Invitation to take Qualtrics Survey'.

8. Customize the email message.

The screenshot shows the email message body in the Qualtrics email creation interface. The message content is as follows:

Dear colleague,

Follow this link to the Survey:  
\${!://SurveyLink?d=Take the Survey}

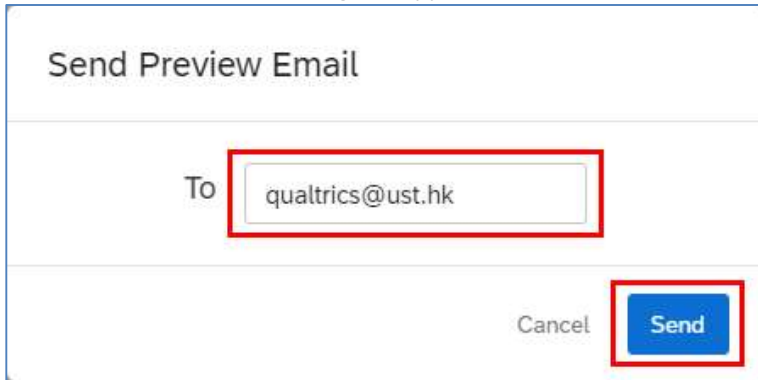
Or copy and paste the URL below into your internet browser:  
\${!://SurveyURL}

Follow the link to opt out of future emails:  
\${!://OptOutLink?d=Click here to unsubscribe}

9. (Optional) Click the **Send Preview Email** button to send a test email to a particular email address.

**Send Preview Email**

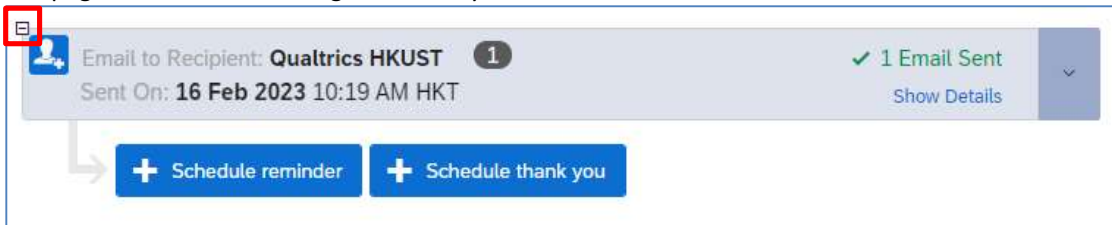
The **Send Preview Email** dialog will appear. Enter an Email address and click the **Send** button.

A dialog box titled "Send Preview Email". It has a "To" field with the email address "qualtrics@ust.hk" entered. Below the field are two buttons: "Cancel" and "Send". The "Send" button is highlighted with a red box.

10. Click the **Send Now** or **Send in ...** button to send out email message to the target respondents.

**✓ Send Now** or **✓ Send in 1 hour**

11. The page will refresh, showing the delivery status of the emails.

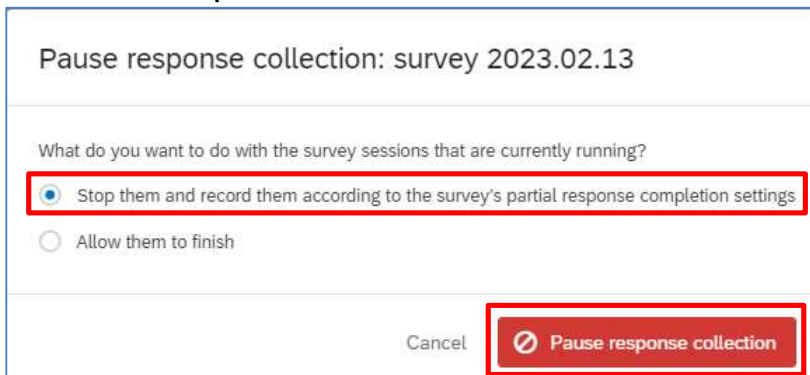
A notification bar showing the status of an email. It includes a small icon in a red box, a person icon, the text "Email to Recipient: Qualtrics HKUST", a badge with the number "1", and a green checkmark with the text "1 Email Sent". Below this, it says "Sent On: 16 Feb 2023 10:19 AM HKT" and a "Show Details" link. At the bottom are two buttons: "+ Schedule reminder" and "+ Schedule thank you".

## Close Survey

1. At **Distributions** page, click the **Pause response collection** button.

**Pause response collection**

2. The **Pause response collection** dialog will appear. Select the option for the unfinished survey sessions. Click the **Pause response collection** button.

A dialog box titled "Pause response collection: survey 2023.02.13". It asks "What do you want to do with the survey sessions that are currently running?". There are two radio button options: "Stop them and record them according to the survey's partial response completion settings" (which is selected and highlighted with a red box) and "Allow them to finish". At the bottom are two buttons: "Cancel" and "Pause response collection" (which is highlighted with a red box).

## G. Data & Analysis and Results

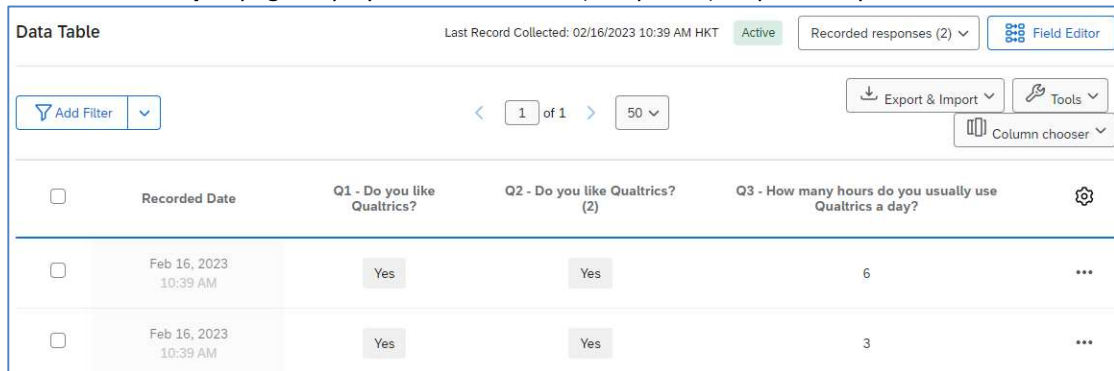
When a survey started collecting responses, you can see the response data right away.

### View Recorded Responses

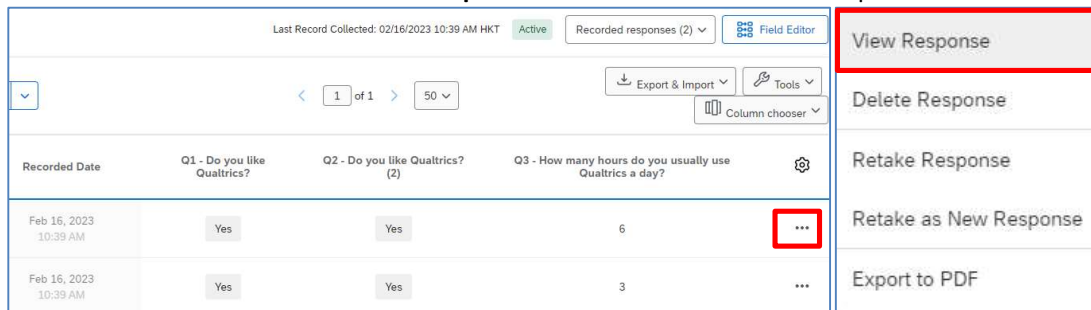
1. Click the **Data & Analysis** tab.



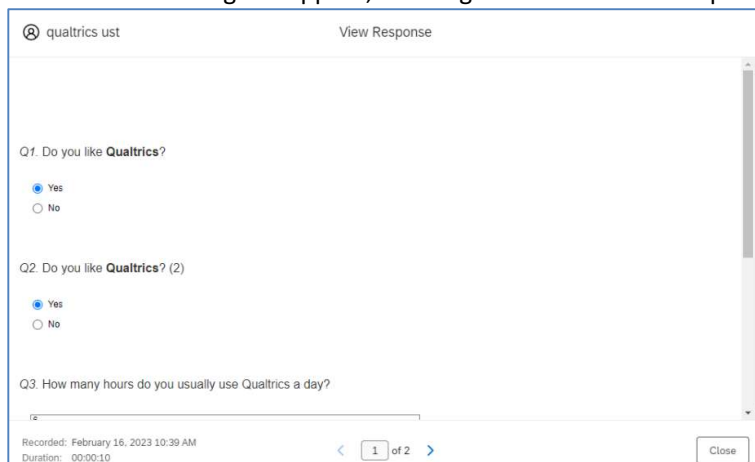
2. The **Data & Analysis** page displays a list of recorded (completed) responses by default.



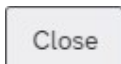
3. Click the “...” button and select **View Response** to view the details of the response.



4. The **Recorded** dialog will appear, showing the details of the response.



5. Click the **Close** button to close the dialog.



## Delete Recorded Response

1. Check the checkbox next to the response record. Click the **Delete** button to delete a response.

<input type="checkbox"/>	Recorded Date	Q1 - Do you like Qualtrics?	Q2 - Do you like Qualtrics? (2)	Q3 - How many hours do you usually use Qualtrics a day?	
<input checked="" type="checkbox"/>	Feb 16, 2023 10:39 AM	Yes	Yes	6	...
<input type="checkbox"/>	Feb 16, 2023 10:39 AM	Yes	Yes	3	...

2. The **Delete Responses** dialog will appear. Check the **I am sure I want to delete 1 response** checkbox. Click the **Delete 1 response** button to confirm the action.

### Delete Responses

☐ Decrement all quotas for deleted responses.

☒ I am sure I want to delete 1 response.

[Cancel](#) [Delete 1 response](#)

## View Responses in Progress

1. At **Data & Analysis** page, click the **Recorded responses** dropdown and select **Responses in progress**.

Recorded responses (28) ^

Recorded responses (28)

Responses in progress (0)

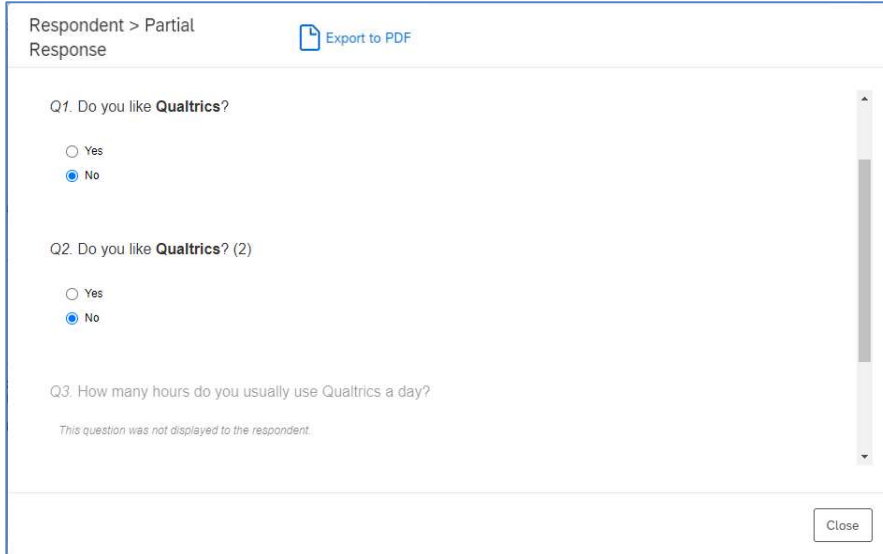
2. The page will display a list of responses in progress (not completed responses).

Data Table						
Last Record Collected: Never Inactive Responses in progress (1) Field Editor						
Add Filter < 1 of 1 50 Export Data Column chooser						
<input type="checkbox"/>	Survey Session ID	First Name	Last Name	IP Address	Email	External R
<input type="checkbox"/>	FS_122OlyMrDrSegeP	SD	PG	143.89.100.147	sdtstpg@connect.ust.hk	s

3. Click on a **Survey Session ID** link to view the details of the response.

<input type="checkbox"/>	Survey Session ID	First Name	Last Name	IP Address	Email	External R
<input type="checkbox"/>	FS_122OlyMrDrSegeP	SD	PG	143.89.100.147	sdtstpg@connect.ust.hk	sdtst

4. The **Respondent > Partial Response** dialog will appear, showing the details of the response.



The dialog box titled "Respondent > Partial Response" displays survey questions and their answers. It includes an "Export to PDF" button at the top right and a "Close" button at the bottom right. The questions are:

- Q1. Do you like **Qualtrics**?  
☐ Yes  
☒ No
- Q2. Do you like **Qualtrics**? (2)  
☐ Yes  
☒ No
- Q3. How many hours do you usually use Qualtrics a day?  
*This question was not displayed to the respondent.*

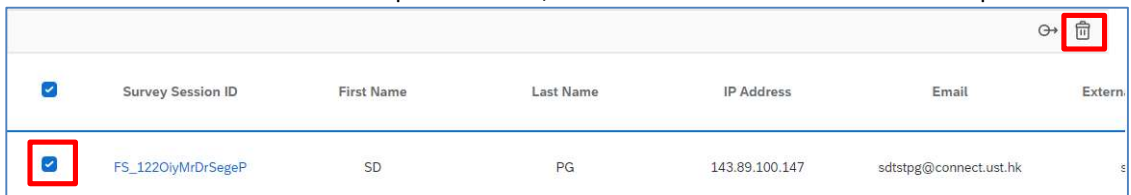
5. Click the **Close** button to close the dialog.



A rectangular button with the text "Close" in a sans-serif font.

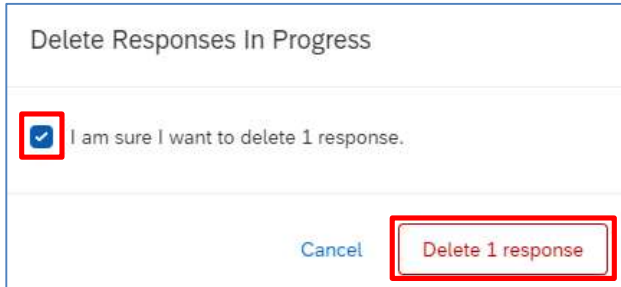
## Delete Response in Progress

1. Check the checkbox next to the response record, click the **Delete** button to delete a response.



<input checked="" type="checkbox"/>	Survey Session ID	First Name	Last Name	IP Address	Email	Extern.
<input checked="" type="checkbox"/>	FS_122OlyMrDrSegeP	SD	PG	143.89.100.147	sdtstpg@connect.ust.hk	s

2. The **Delete Responses in Progress** dialog will appear. Check the **I am sure I want to delete 1 response** checkbox. Click the **Delete 1 response** button to confirm the action.

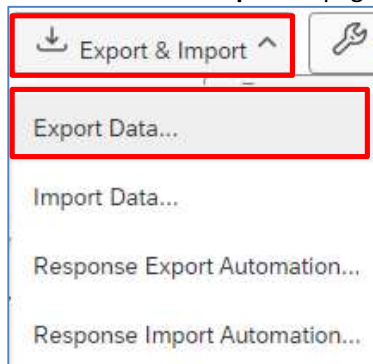


The dialog box titled "Delete Responses In Progress" contains a checkbox labeled "I am sure I want to delete 1 response." and two buttons: "Cancel" and "Delete 1 response".

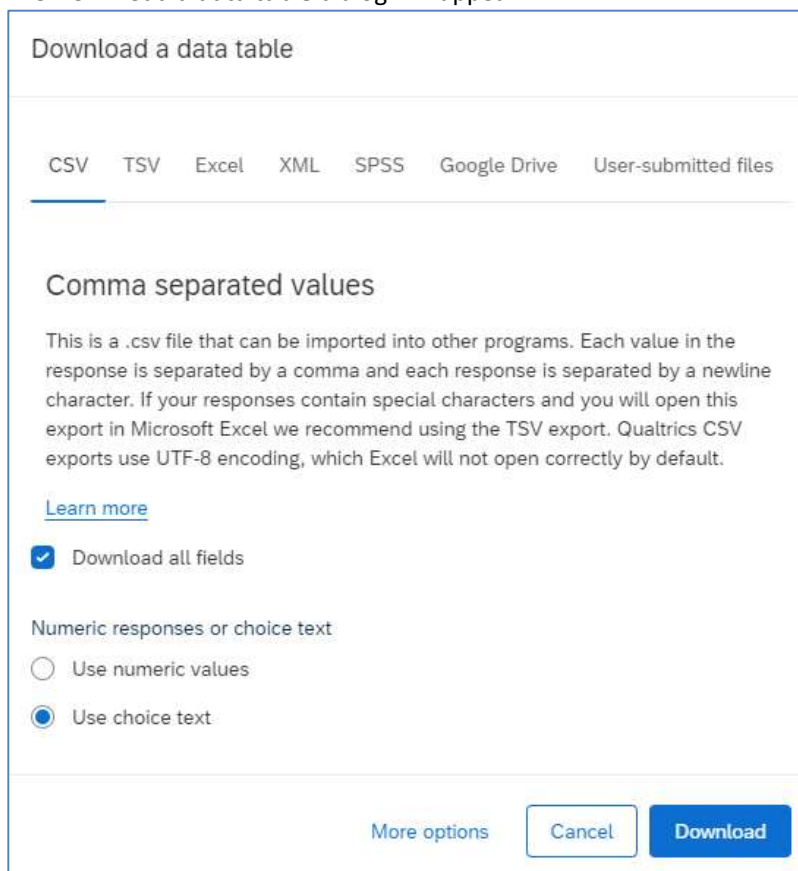


## Download Response Data

1. At the **Recorded Responses** page, click the **Export & Import** dropdown and select **Export Data....**



2. The **Download a data table** dialog will appear.



3. Select a **file format** to download the data with the selected format, e.g. Excel.



4. Check if **Use choice text** checkbox is checked. Click the **Download** button.

### 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](#) Cancel Download

5. In the **Manage Downloads** dialog, click the **Download** link to save the file in a local PC.

### Manage Downloads

Status	Type	Last Updated	
<a href="#">Download</a>	csv (Table)	a few seconds ago	

Close

6. Click the **Close** button to close the dialog.

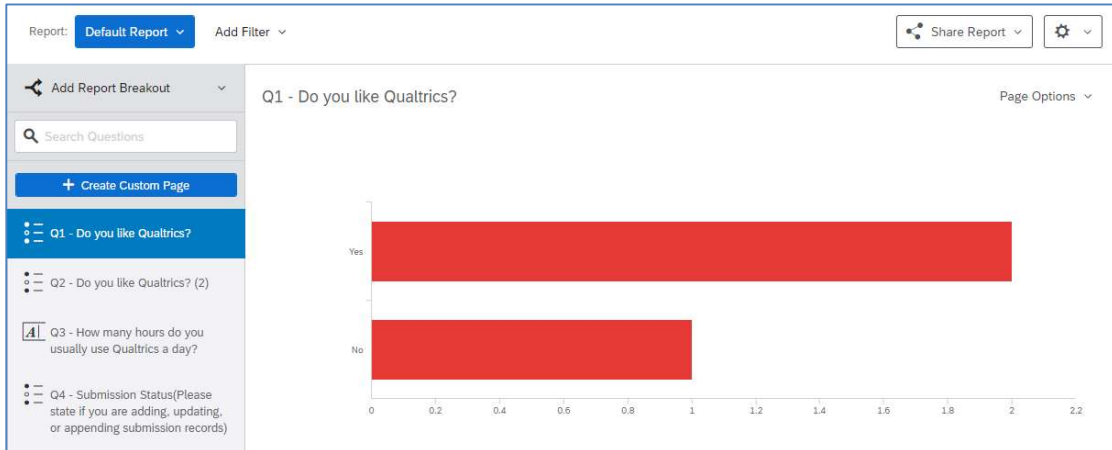
Close

## View Default Report

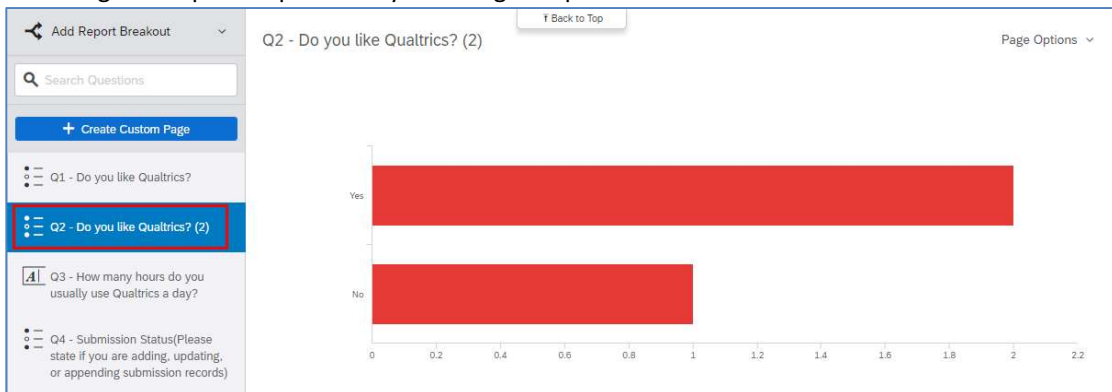
1. Click the **Results** tab.



2. It will direct to the **Results** page. The default report is displayed, and the results of questions are displayed one by one.



3. You can go to a specific question by selecting the question text.



## Add a Filter by Question

1. Click the **Add Filter** dropdown and select the question text.



- The filter rule will be displayed. Select an operation from the **Select Operator** dropdown and select the choice from the **Select Operand** dropdown.

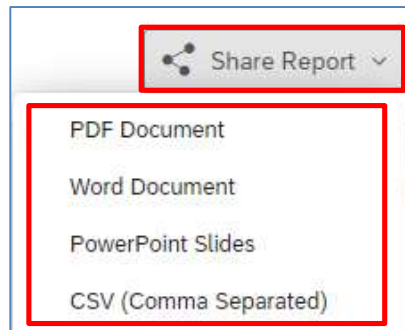
Q1 - Do you like Qualtrics? ▾	Select Operator ▾	Select Operand ▾
-------------------------------	-------------------	------------------

- The rule would be displayed, and the report will refresh accordingly to show the latest results according to the rule applied.

Q1 - Do you like Qualtrics? ▾	Is ▾	1 - Yes ▾
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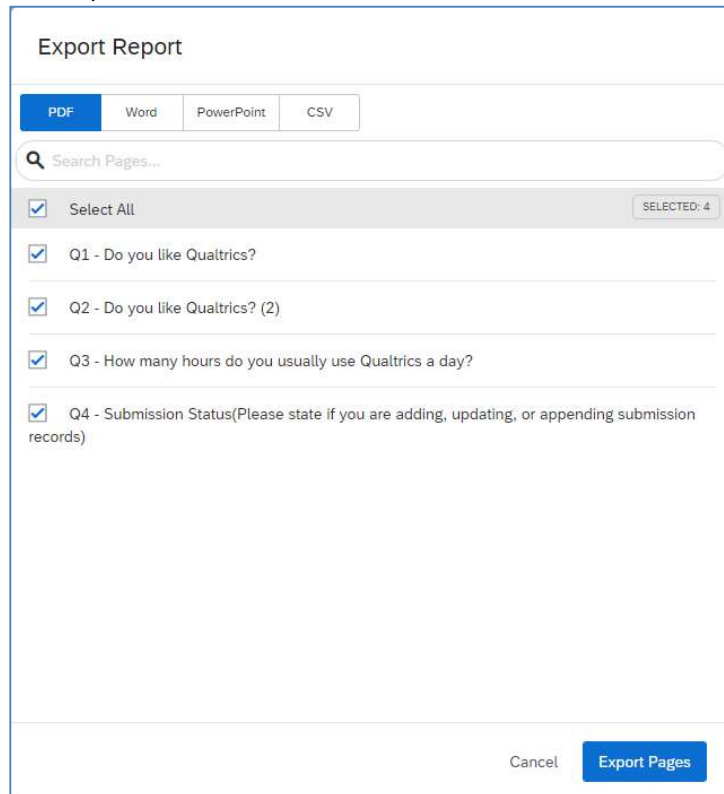
## Export Report

- Click the **Share Report** dropdown, and select the report format, including **PDF Document**, **Word Document**, **PowerPoint Slides** or **CSV (Comma Separated)** (spreadsheet).



A screenshot of a 'Share Report' dropdown menu. The menu is open, showing four options: 'PDF Document', 'Word Document', 'PowerPoint Slides', and 'CSV (Comma Separated)'. The entire dropdown menu is highlighted with a red rectangular box.

- The **Export Report** dialog will appear. You can change your report format by clicking on the tabs of each report format and check/uncheck the checkbox to select which question(s) to be exported.

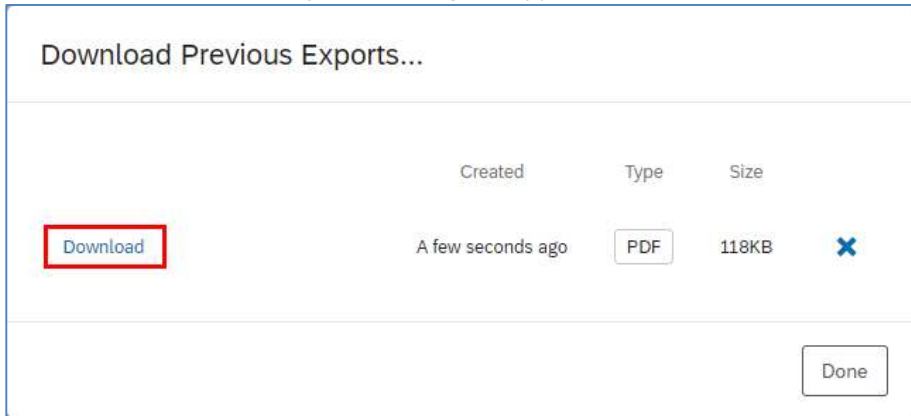


A screenshot of the 'Export Report' dialog box. At the top, there are four tabs: 'PDF' (selected), 'Word', 'PowerPoint', and 'CSV'. Below the tabs is a search bar labeled 'Search Pages...'. Underneath the search bar is a list of questions with checkboxes next to them. All four checkboxes are checked. The questions are: 'Q1 - Do you like Qualtrics?', 'Q2 - Do you like Qualtrics? (2)', 'Q3 - How many hours do you usually use Qualtrics a day?', and 'Q4 - Submission Status(Please state if you are adding, updating, or appending submission records)'. At the bottom right, there are two buttons: 'Cancel' and 'Export Pages'.

3. Click the **Export Pages** button.



4. The **Download Previous Exports...** dialog will appear. Click the **Download** link to collect the report.



5. Click the **Done** button to close the dialog.

