Introduction to Qualtrics

ITSC

May 2021
Contents

A. General Information .................................................................................................................................. 4
B. Login ........................................................................................................................................................... 5
   New Qualtrics User .................................................................................................................................... 5
C. Create Project ............................................................................................................................................ 8
   Create a Survey Project from Scratch ........................................................................................................ 8
D. Prepare Survey ........................................................................................................................................... 10
   Add / Edit Question ................................................................................................................................. 10
   Delete Question ....................................................................................................................................... 14
   Copy Question from Current Survey ......................................................................................................... 16
   Import Question from Another Survey / Library ..................................................................................... 16
   Move Question ........................................................................................................................................ 18
   Add Page Break ........................................................................................................................................ 20
   Add Skip Logic ......................................................................................................................................... 21
   Add Display Logic .................................................................................................................................... 22
   Auto-Number Questions .......................................................................................................................... 23
   Show Progress Bar and Change Next / Back Button Text ........................................................................ 24
   Preview Survey ........................................................................................................................................ 26
   Setup Authenticator for UST Respondents .............................................................................................. 27
   Setup Authenticator for Non-UST Respondents ...................................................................................... 34
   Allow Respondent to Resume Non-Completed Survey ........................................................................... 39
   Collaborate Survey ................................................................................................................................ 42
E. Setup Contacts ......................................................................................................................................... 44
   Create Contact List ................................................................................................................................... 44
   Import From a File .................................................................................................................................... 45
   Add Contacts Manually ............................................................................................................................ 47
F. Distribute Survey ..................................................................................................................................... 48
   Set Survey Availability ............................................................................................................................. 48
   Activate Survey ........................................................................................................................................ 50
   Distribute Survey through Email ............................................................................................................. 51
   Close Survey ............................................................................................................................................ 53
G. Results and Report ................................................................................................................................... 54
   View Recorded Responses ....................................................................................................................... 54
   Delete Recorded Response ..................................................................................................................... 55
   View Responses in Progress ................................................................................................................... 55
   Delete Response in Progress ................................................................................................................... 56
   Download Response Data ....................................................................................................................... 57
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.
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.

New Qualtrics User
1. If you are a new user, click the I don't have a Qualtrics account button.
2. The Account Information dialog will appear. Enter your Email, First Name, and Last Name. Click the Update button.

3. Click the I accept button to confirm the Terms of Service.
4. You will be logged in. Qualtrics will display the **Create new project** page.
C. Create Project

To create a new survey, click the Create new project button at the Projects page.

It will direct to the Catalog 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 Catalog page.

2. Click the Get started button.
3. Enter a **Name** for the survey project.

   ![Create a new project](image)

   **Name**
   
   **Survey 2021.05.05**

   **Folder**
   
   **Uncategorized**

   **How do you want to start your survey?**
   
   **Create a blank survey project**

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.

   ![Edit Survey page](image)
D. Prepare Survey
To work on a survey, 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.

![Rich Content Editor](image1)

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

![Text Editor](image2)

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.

![Multiple Choice Options](image3)
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.

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

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

![Delete Question](image)
2. You can also click the “…” button and select **Delete** to delete the question.

![Delete button and options]

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

![Trash with question]

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.

![Edit question pane]

5. If you do not need the questions any more, 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.

   ![Question Block]

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

   ![Cropped Question Block]

Import Question from Another Survey / Library
1. Click the Import from library button at the bottom of the question block.

   ![Import from library button]

2. The Please Select a Library dialog will appear. Select My Surveys.
3. Select a survey.

4. Select a survey question from the left and click the **Import 1 Question** button.

5. A copy of the selected question will be added to the survey as the last question.
Move Question
1. Click the “…” button and select Move question.

![Move question dialog]

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.

![Move question to dialog with Top of block selected]

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

![Move question to dialog with After selected and Q1 selected]

4. Click the Confirm button.
5. Q3 is now placed before Q1.

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

3. Click the Save button.

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

![Create a New Message dialog](image1)

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

![Save button](image2)

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

![Previous Button Text](image3)

7. Click the **Apply** button.

![Apply button](image4)

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

![Builder button](image5)
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](image)

6. Select **Use Brand Settings** as the **SSO Type**.

![Branch on Successful Authentication](image)

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](image)
8. Click the **Select Library**... dropdown and select **My Library**.

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

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**.
With this setup (Step 4 – 10), respondents are required to log in 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.

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

12. Hover the mouse on the word **Move** at the right side of the Question Block. The mouse icon will change to a cross.
13. **Drag and drop** the Question Block to the sub-level of the Authenticator.

![Image of Drag and Drop](image)

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.

![Image of Authenticator](image)

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.

![Builder button](image)

**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.

![Survey flow button](image)

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

![Add a New Element Here](image)

3. Click the **Authenticator** button.

![Authenticator button](image)
4. Select **Contact** as the **Authentication Type**.

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

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

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

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.

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

10. Drag and drop the Question Block to the sub-level of the Authenticator.
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.
3. The **Options** dialog will appear. Check the **Reload any previously saved progress upon authentication** checkbox.

![Options Dialog]

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.

![Options panel](image)

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.

![Incomplete survey responses](image)

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

![Builder button](image)
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** button.

   ![Add button](image)

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

   ![Collaborate with dialog](image)

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

<table>
<thead>
<tr>
<th>User</th>
<th>Edit</th>
<th>View Reports</th>
<th>Activate/Deactivate</th>
<th>Copy</th>
<th>Distribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>cchelp (cchelp#ust)</td>
<td>☑ Details</td>
<td>☑ Details</td>
<td>☑</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7. Click the **Save** button.

   ![Save button](image)
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 **Contacts**.

2. It will direct to the **Contacts** page. Click the **Create Contact List** button.

3. The **Create Contact List** dialog will appear. Enter the **Name** of the contact list.

4. Click the **Next** button.
5. The **Add Contacts** dialog will appear. It shows three ways to add members to the contact list, including **Import From a File** (import a .csv file), **Add Manually**, and **Import From a Survey** (import contacts from people who have taken a survey). Here, we will focus on **Import From a File** and **Add Manually**.

![Add Contacts Dialog](image)

**Import From a File**

1. The **Import From a File** is selected by default. Click the **Example Document** link to download the sample CSV file.

![Example Document](image)

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

![Excel CSV](image)

3. Click the **Browse...** button.
4. Select the CSV file and click the **Open** button.

![Select CSV file](image)

5. Scroll down and verify the fields displayed in the dialog. Select **Ignore** for the fields **EmbeddedDataA** and **EmbeddedDataB**.

![Verify Fields](image)

6. Click the **Add Contacts** button.

![Add Contacts button](image)

7. When the import completed, the Add Contacts dialog will close. Click the **View Contact List** link to see the list of the members or click the **red cross** button to close the job.
8. The page will refresh to show the member list.

Add Contacts Manually
1. In the Add Contacts dialog, click the Add Manually button.

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.

3. Click the Add Contacts button.

4. The page will refresh to show the member list.
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.

![Edit survey availability dialog]

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

![Save changes button]

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

![Builder button]
Activate Survey

1. At Survey page, click the Publish button.

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

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 Close button.

4. Once the survey is activated, you can always go to the Distributions page to retrieve the survey link. Click the Distributions tab.
5. It will direct to the **Distributions** page. Click **Anonymous link** at the left panel of the page.

![Anonymous link](image)

6. The page will display the survey link there.

![Anonymous Survey Link](image)

**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.

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

![Emails](image)

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

![Compose Email](image)

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

![Select Contacts](image)
4. Select 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.

   **From:** qualtrics@ust.hk  
   **From Name:** HKUST Qualtrics Support  
   **Reply-To Email:** qualtrics@ust.hk

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

   **When:** Send Now

7. Enter the Subject.

   **Subject:** Invitation to take Qualtrics Survey

8. Customize the email message.

   Dear colleague,

   Follow this link to the Survey:  
   $\text{[SurveyLink?d=Take the Survey]}$

   Or copy and paste the URL below into your internet browser:  
   $\text{[SurveyURL]}$

   Follow the link to opt out of future emails:  
   $\text{[OptOutLink?d=Click here to unsubscribe]}$
9. **(Optional)** Click the **Send Preview Email** button to send a test email to a particular email address.

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

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

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

**Close Survey**

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

2. The **Pause response collection** dialog will appear. Select the option for the unfinished survey sessions. Click the **Pause response collection** button.
G. Results and Report
When a survey started collecting responses, you can see the results right away.

View Recorded Responses
1. Click the Data & Analysis tab.

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

3. Click the down arrow action 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 **With Selected** dropdown, and select **Delete...** to delete a response.

![Delete Responses](image)

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](image)

### View Responses in Progress

1. Click the **Responses in Progress** button at the **Data & Analysis** page.

![Responses in Progress](image)

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

![Responses in Progress](image)

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

![Survey Session ID](image)
4. The **Respondent > Partial Response** dialog will appear, showing the details of the response.

![Image of Respondent > Partial Response dialog]

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

![Image of Close button]

**Delete Response in Progress**

1. Check the checkbox next to the response record. Click the **With Selected** dropdown, and select **Delete...** to delete a response.

![Image of With Selected dropdown]

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.

![Image of Delete Responses In Progress dialog]
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](image)

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

![Manage Downloads](image)

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

1. Click the Reports tab.

2. It will direct to the Reports > 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.

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

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

Export Report
1. Click the Share Report dropdown, and select the report format, including PDF Document, Word Document, PowerPoint Slides or CSV (Comma Separated) (spreadsheet).
2. 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.

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.