Introduction to Qualtrics

ITSO



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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 <u>qualtrics@ust.hk</u>.

B. Login

- 1. Open a web browser and type the address of the Qualtrics web site. <u>https://ust.qualtrics.com</u>
- 2. Login with your **HKUST 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**.

XM = Home		04 0
U Welcome to XM 發	Learn how to create a project from scratch Waith our free, on demand training to learn survey building fundamentals by creating question and answer choices that engage respondents. Learn more	X View course
Q Search by name, type, owner	Active surveys	
Recently valied See all projects will appear here for easy access	Create and activate your first survey and see an overview of your response counts Create a survey	
	Your workflows summary	
	Create a workflow Learn more about workflows Learn more about workflows	
Create a new project		

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**.

XM =					
Q Search the catalog	Create a project				
 ▶ Type ♥ What you're measuring 	From scratch				
Customers Employees	Survey	Imported Data			
Markets Students Website and app visitors	Guided projects Start building using a pre-built solution v	with step-by-step guidance			
✓ Department	Product Optimization (Conjoint)	Concept Testing (Basic) Assess the strengths and weak-	Pricing Study (Van Westendorp)	Product Naming Find the best name for your next	Brand Awareness & Performance
Customer experience Education	Find out what features people want from your next product	nesses of potential new products or services	Identify optimal product pricing with 4 simple questions	product	Assess the current state of your brand
Human resources Market research	432	Ē	Ŕ	200	÷¢:-
Marketing and advertising					
Use case Advertisement and creative testing	Brand Perceptions Understand your brand's percep- tions relative to competitors	Advertising Creative Testing Evaluate creative executions with			
Brand testing Brand tracking		customer feedback			
Candidate experience	9	ā			

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
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.

Create project

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

XM	≡ survey 2023.02.13 ∨	 ① ① ①
Survey	Workflows Distributions	Data & Analysis Results Reports
	Edit question	Tools V Saved at 4:57 PM Draft Q Preview Publish
8	Question type	currues 2022-02-12
P	ŧΞ Multiple choice ∨	
ş	- Answer type	✓ Default Question Block
ХÂ	 Allow one answer 	
	 Allow multiple answers 	Click to write the question text
	- Choices	O Click to write Choice 1
	Number of choices	Click to write Choice 2
	- 3 +	Click to write Choice 3
	Edit multiple	Import from library Add new question
	Use suggested choices	Add Block

D. Prepare Survey

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

XM	Projects	
☆ Sta	r 🖒 Home	
 Sha 	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.

Project name	Status Responses Type	Last modified 💱 🔞
☆ 🗈 survey 2023.02.13	New — Survey	Activate
		Collaborate
	< 1 of 1 >	Rename project
		Copy project
		Move to
		Edit survey

Add / Edit Question

1. Click the Add new question button.

+ Add new question

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.

Edit question				
Questi	ion type			
:=	Multiple choice 🗸 🗸			
8 ≡	Multiple choice	^		
(]⊃	Text entry			
Ŧ	Text / Graphic			
000	Matrix table			
⊸	Slider			
	Form field			
1 1 1	Rank order			
* 0 0 *	Side by side			
NPS	Nat promotar scora	•		

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 Piped Text	HTML View Normal View
Click to write the question text	
Edit Question Label	•
 Click to write Choice 2 	
 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.



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.

- Choices			
Number of choices			
Use suggested choices			
True - False			
Yes - No			
Below Avg - Above Avg			
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.

Edit question	Tools V Saving Draft		Q Preview Publish
Question type	survey 2023.02.13		∵ġ: ExpertReview score Great
Answer type	Default Question Block		
Allow multiple answers	Q1 Do you like Qualtrics	? Allow Text Entry	
 ✓ Choices Number of choices 	Definitely not Probably not	Text Entry Size	
- 5 + Edit multiple	Might or might not Probably yes Definitely yes	Rich Content Editor	_
Use suggested choices	•	Insert Graphic	rary + Add new question
Yes - No 🗸		Insert Piped Text	>
Choice display	End of Survey	Add Display Logic	
Show first and last	v	Assign to Group Move Up	,
← Format		Move Down Remove Choice	

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

 ✓ Response requirements 		
Add requirements		
Force response		
 Request response 		
Add validation	\bigcirc	

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				
Number V				
Minimum				
1				
Maximum				
10				
Maximum decimals				
0				

Delete Question

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

	Q2	*
Θ	How many hours do you usually use Qualtrics a day?	
_		

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

	Q2 How many hours do you usually use Qualtrics	Move question	
		Replace from library	
•		Preview question	question
	Add Bloc	Add note Delete	
End of Sur	vey		

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

✓ Trash 1 Question	Empty trash
Q2	*
How many hours do you usually use Qualtrics a day?	

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			
Restore Permanently delete			
Question type			
[]⊐ Text entry ~			

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

Empty trash

Copy Question from Current Survey

1. Click the "..." button and select **Copy**.

	21	Move question	•••
	Do you like Qualtrics ?	Сору	
) Yes) No	Replace from library	
		Add page break	_
•		Preview question	question
		Add note	
	Ad	Delete	

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

Q1 Do you like Qualtrics ?	*
O Yes O No	
Q3 Do you like Qualtrics? O Yes O No	*

Import Question from Another Survey / Library

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

Import from library

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

Question Library		
Q Search		
XM Qualtrics Certified	0	
Qualtrics Library		
🛱 Copy from Existing Survey	>	

3. Select a survey.



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

 ITSC - IT Training for Admin St Course Registration (Template 	aff -)	×
③ Block 1		
IT Training Programme for Administrative Staff Course		
플 Text / Graphic		
Please provide the following information for registration:		
₩ Multiple Choice		
Department / Office Representative Information (as a contact point for		
G Form Field		
Submission Status(Please state if you are adding, updating, or appending		
i⊟ Multiple Choice		J
Insert question		

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

\Box	Q5	۲	•••
	Submission Status (Please state if you are adding, updati	ing, or appending submission records)	
	Click here to edit choices		
	New Submission		

Move Question

1. Click the "..." button and select **Move question**.

✓ Q1	Move question	•••
Do you like Qualtrics ?	Сору	
O Yes	Replace from library	
	Add page break	
	Preview question	questio
	Add note	
	Add Bloc	

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		×
Position			
Top of block	^		
 Top of block			
Bottom of block		Cancel	Confirm
Before	- 1	How many hours do you usually use Qualtrics a day	/?
After			

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	×
Position	
Before	~
Question	
Q1 Do you like Qualtrics?	
	Cancel Confirm

4. Click the **Confirm** button.

Confirm

5. Q3 is now placed before Q1.

Q3	*
Do you like Qualtrics ?	
⊖ Yes	
O No	
Q1	*
Do you like Qualtrics ?	
O Yes	
O No	

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

Q3	* …
Do you like Qualtrics ?	
○ Yes	
○ No.	
Q1	*
Do you like Qualtrics ?	
O Yes	
O No	
 Move 1 question	

Add Page Break

1. Click the "..." button and select **Add page break**.

+ Q1	Move question	
Do you like Qualtrics ?	Copy Replace from library	
⊕	Add page break	
A	Preview question	question
Add Blo	Add note Delete	

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

Q1	*
Do you like Qualtrics ?	
O Yes	
O No	
 Page Break	

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.

Q1	*
Do you like Qualtrics ?	
⊖ Yes	
O No	
+ Add page break	
Q3	*
Do you like Qualtrics ?	
⊖ Yes	
O No	

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.

Skip logic						×
Skip from this quest	ion to					
End of Block	~	if No	~	Is Selected	~	
					Cancel	Confirm

3. Click the **Confirm** button.

Confirm

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

\Box	Q1	*	••••
•	Skip to		
	Do you like Qualtrics?		
	⊖ Yes		
	O No		

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.

Display Logic (How many hours do you usually use Qualtrics a day?)		
Display this Question only if the following condition is met: Question ~ Q1 Do you like Qualtrics? ~ Yes ~ Is Selected ~		• •
□ In Page (In Page Display Logic may be incompatible with Response Validation)	Close	✓ Save

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**.

€ Tools ∧	
Auto-number questions	
Reset recode values	
Manage reusable choices	
Generate test responses	
Review	>
Collaborate	
Versions	>
Import/Export	>

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

Auto-number questions						
Update the export tag numbering of all questions using:						
Q1 Q1.1 QID1 Sequential Block Internal ID						
 Add custom prefix Skip export tags that I have defined 						
Арріу						

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

	Q1	* …
	Do you like Qualtrics ?	
	O Yes	
	O No	
-		
	Q2	*
	Do you like Qualtrics ? (2)	
	O Yes	
	O No	

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.

Theme	Progress Bar
	None 🗸
Layout	None
General	With Text
Style	Without Text
Motion	With Verbose Text

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

Next Button Text →	● 香港科技大學 THE HONG KONG UNIVERSITY OF SCIENCE	
Devices Detter Test	My Library: HKUST Qualtrics Support	Q Search
	Group Library: Hong Kong University of Science and Technolog $$ >	No results
	Global Library: Qualtrics Library	New Message
Progress Bar Without Text	Use Fixed Text	

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

Create a N	New Message	
Category Description	Look and Feel Messages	*
ë (a) e C d i	⊠ Font - Size - B I U ि Less ⊠ - A - E = = ← → स≣ स≣ ﷺ ⊞ ⊞ © ≪ ग्र	
Next		

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



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

Previous Button Text	Do you like Qualtrics ?	
←	✓	
Progress Bar	My Library: HKUST Qualtrics Support	٩
Without Text	Group Library: Hong Kong University of Science and Technolog $^{>}$	Button Text - Next
	Global Library: Qualtrics Library	New Message
Questions Per Page	Use Fixed Text	

7. Click the **Apply** button.



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

	Builder
00	
ľ	
٩Ļ	

Preview Survey

1. Click the **Preview** button.

Preview

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.

Restart Survey Place Bookmark Tools V III	ංසී Share Preview
► ● ● ● ● ● ● ● ● ● ● ● ● ●	12:29
No	Do you like Qualtrics? (2)
Do you like Qualtrics? (2)	Yes No
Yes	→
No	Powered by Qualtrics 다

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.

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

3. Click the **Authenticator** button.

What do you wa	ant to add? Cano	el							
Block	№ Branch	ED E	mbedded Data	×	Randomizer	🔊 Web	Service	Text Sent	iment - Topic
Group	Authenti	cator	A End of Surv	ey	🖹 Reference	survey	🔳 Table	e of Contents	

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

Branch on Successful	Authentication		
Authentication Type:	sso 🗸		
Associate Responden	t With Panel	Need H	elp?
Select Library	v		
Capture respondent i	dentifying info		
SSO Type: Token	v		
Encryption Method	3DES V		
Mac Method	md5 🗸		
Leeway	300 Seconds		
Кеу	Generate Key		
	Generate Test Token Note: You must save the survey flow before using the generated token.		
This SSO type may not fur	action properly with Preview Survey.		
	Move Duplicate Options	Collapse	Delete

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

Branch on Successful A	Authentication						
Authentication Type:	sso 🗸						
Associate Respondent	t With Panel					Need H	Help?
Capture respondent id	lentifying info						
SSO Type: Token	~						
Encryption Method	3DES V						
Mac Method	md5 🗸						
Leeway	300	Seconds					
Кеу		Generate Key					
	Generate Test Token Note:	You must save the survey flow before using	the gene	rated token.			
This SSO type may not fun	ction properly with Preview Sur	vey.					
			Move	Duplicate	Options	Collapse	Delete

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

Branch on Successful Authentication					
Authentication Type: SSO V					
Associate Respondent With Panel				Need I	Help?
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 HKUST account when they take the survey. Respondents with valid HKUST account would login successfully and can take the survey.

 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	Need Help?
	Select Library	

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

Branch on Successful Authentication					
Authentication Type: SSO					
Associate Respondent With Panel				Need	Help?
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	Need Help?
My Library: Qualtrics Support Qualtrics Workshop	
Identified By Field(s):	
Last Name 🗸 🖨 🖨	
First Name V	

10. Select Email as the Identified By Field(s).

Note: When you prepare the contact list, you need to provide the HKUST email address in the field **Email** (or you may use **External Data Reference** instead).

Branch on Successful Authentication						
Authentication Type: SSO V						
Associate Respondent With Panel					Need I	Help?
My Library: Qualtrics Support	Qualtrics Workshop					
Identified By Field(s): Email Capture respondent identifying info SSO Type: Shibboleth Connection UST Organization This SSO type may not function properly with	Or by External Data Reference: Identified By Field(s): External Data Reference SSO Preview Survey.					
		Move	Duplicate	Options	Collapse	Delete

With this setup (Step 4 – 10), respondents are required to login with their HKUST account when they take the survey. Respondents listed in the contact list with valid HKUST 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 **HKUST account username** and **HKUST email address** would be collected.

Branch on Successful Authentication					
Authentication Type: SSO					
Associate Respondent With Panel				Need I	Help?
My Library: Qualtrics Support Qualtrics Workshop					
Identified By Field(s):					
Email ~					
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 I	Help?
My Library: Qualtrics Support	Qualtrics Workshop					
Identified By Field(s):						
Email 🗸 🕒						
Capture respondent identifying info Add Embedded Data						
SSO Type: Shibboleth Connection UST Organization SSO						
This SSO type may not function property 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. Type **user_email** in the **Embedded Data to Set...** field, and **email** in the **Field From SSO** field.

Branch on Successful Authentication					
Addition type: 000				Need I	Help?
My Library: Qualtrics Support					
Identified By Field(s):					
Email V					
Capture respondent identifying info		_			
username = uid	•	6			
💷 user_email = email	•	0			
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: Block 1 (1 Question)	Add Below	Move	Duplicate	Delete
÷	Branch on Successful Authentication				
	Authentication Type: SSO V				
	Associate Respondent With Panel			Need I	Help?
	My Library: Qualtrics Support				
	Identified By Field(s):				
	Email ~				
	Capture respondent identifying info				
	username = uid	• •			
	💷 user_email = email	• •			
	SSO Type: Shibboleth				
	This SSO type may not function properly with Preview Survey.				
	Mit	ove Duplicate	Options	Collapse	Delete
	+ Add a New Element Here				
Ļ	+ Add a New Element Here				

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

P	
Branch on Successful Authentication	
Authentication Type: SSO V	
Associate Respondent With Panel	Need Help?
My Library: Qualtrics Support Qualtrics Workshop V	
Identified By Field(s):	
Email Y	
Capture respondent identifying info	
username = uid	
🔟 user_email = email 🗢 🔂	
SSO Type: Shibboleth	
Connection UST Organization SSO 🗸	
This SSO type may not function properly with Preview Survey.	
Maya Durlicata Ontion	s Collansa Deleta
	s conapse Detete
+ Add a New Element Here Drag and Drop to the desired location.	
+ Add a New Element Here	

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.

Authentication	1 Type: [330 •					Name	Jala 2	
Associate R	espondent With Panel					Need	netpr	
My Library	: Qualtrics Support		Qualtrics Wor	kshop				
Identified E	By Field(s):							
Email	~	9						
Capture res	pondent identifying info							
	username	=	uid	• •				
	🛛 user_email	=	email	٥				
SSO Type: [Ci	Shibboleth	sso 🗸						
This SSO type I	may not function properly with	Preview Surve	y.					
-				Move Duplicat	e Options	Collapse	Delete	
→ [Show Block: Block	1 (1 Questio	1)			Add E	elow Mo	we Duplicate

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

Show Block: Block 1 (1 Question)	Add Below	Move	Duplicate	Delete
+ Add a New Element Here				
+ Add a New Element Here				

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

What do you want to add? Cancel											
	Block	Sranch ™	ranch 💷 Embedded Data			Randomizer	n Web	Service	Text Sentiment - To	oic	
	Group	up 🔒 Authenticator		A End of Surv	ey	菌 Reference	e survey	🔳 Table	e of Contents		

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

÷	Show Block: Default Question Block (4 Questions)								Add Below	Move	Duplicate	Delete	
÷	A	End of Survey	Move	Duplicate	Customize	Delete							
Ļ	+ Ad	d a New Element Here											

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

							Move	Duplicate	Options	Collapse	Delete			
	→	Ŷ	Show Block: Default Qu	uestion Block (1 Question)					Add E	Below	Move	Duplicate	Delete
		A	End of Survey	Move	Duplicate	Customize	Delete							
	Ļ	+ Add	a New Element Here											
Ľ	+ Add a New Element H	lere												

19. Click the End of Survey button.

What do you want to add? Cancel												
•	Block	№ Branch	ED E	mbedded Data	×	Randomizer	🔊 Web	Service	🔊 Text Sentiment - Topi			
	Group	Authenticator		A End of Surv	ey	菌 Reference	e survey	🖽 Table	e of Contents			

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.

+ 💽 s	how Block: Defau	lt Questio	n Block	(1 Question)			Add Below	Move	Duplicate
	nd of Survey		Move	Duplicate	Customize	Delete			
+ Add a N	lew Element Here								
				-					

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.

Survey flow Draft				
Show Block: Default Question Block (4 Questions)	Add Below	Move	Duplicate	Delete
+ Add a New Element Here				

3. Click the **Authenticator** button.

What do you want to add? Cancel										
Block	№ Branch	ED E	mbedded Data	Randomizer	🔊 Web	Service	Text Sentiment - Topic			
Group	Authenticator		A End of Surv	ey 🗎 Reference	e survey	🖽 Table	e of Contents			

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

 Destinate	0	0.1	Datas
Move	Move Duplicate	Move Duplicate Options	Move Duplicate Options Collapse

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					9
	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					
Authentication Fields					
Email Optional Label Descurred Dree fill					•
					~
					2.1.1.
	Move	Dupticate	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: Contact					
Authenticate Using Contact					
My Library: HKUST Qualtrics Support 🗸 Qualtrics Workshop 🗸					
Authentication Fields					
Email Optional Label Password Pre-fill					0
	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.

uthentication Typ	contact	~							
uthenticate Using	Contact								
My Library: HKUST	Qualtrics Supp	ort	v [0	Qualtrics Workshop 🗸					
thentication Fiel	ds								
Email	- Oj	tional Label	Z Passwe	ord Pre-fill					•
r F	ithentication Tyj thenticate Using My Library: HKUST thentication Fiel Email	thentication Type: Contact thenticate Using Contact My Library: HKUST Qualtrics Supp thentication Fields Email v Op	thentication Type: Contact thenticate Using Contact My Library: HKUST Qualtrics Support thentication Fields Email Optional Label	thentication Type: Contact thenticate Using Contact My Library: HKUST Qualtrics Support thentication Fields Email Optional Label Passwo	thentication Type: Contact thenticate Using Contact My Library: HKUST Qualtrics Support Contact thentication Fields Email Optional Label Pre-fill	thentication Type: Contact thenticate Using Contact My Library: HKUST Qualtrics Support thentication Fields Email Optional Label Pre-fill	thentication Type: Contact thenticate Using Contact My Library: HKUST Qualtrics Support thentication Fields Email Optional Label Password Pre-fill	thentication Type: Contact thenticate Using Contact My Library: HKUST Qualtrics Support Qualtrics Workshop thentication Fields Email Optional Label Pre-fill	thentication Type: Contact

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.

	-				
	Branch on Successful Authentication				
	Authentication Type: Contact				
	Authenticate Using Contact				
	My Library: HKUST Qualtrics Support 🗸 Qualtrics Workshop 🗸				
	Authentication Fields Email V Optional Label Pre-fill		o		
		Move Duplicate Option	is Collapse Delete		
	Show Block: Default Question Block (4 Questions)		Add Below Mo	ve Duplicate	Delete
	+ Add a New Element Here				~
▲ + Ad	d a New Element Here				

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

		Move	Duplicate	Options	Collapse	Delet	e		
	Show Block: Default Question Block (4 Questions)				Add	Below	Move	Duplicate	Delete
	+ Add a New Element Here								
+ Add a N	lew Element Here								

13. Click the End of Survey button.

What do you wa	ant to add? Canc	el							
Block	№ Branch	ED E	mbedded Data	×	Randomizer	🔊 Web	Service	Northeast Text Sentin	nent - Topic
Group	Authenti	cator	A End of Surve	ey	🗎 Reference	e survey	🔳 Table	e of Contents	

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

+	Ŷ	Show Block: Default Qu	estion Block	(4 Question	is)		Add Below	Move	Duplicate	Delete
÷	A	End of Survey	Move	Duplicate	Customize	Delete				
Ļ	+ Add	a New Element Here								

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

								Move	Duplicate	Options	Collapse	Delete	•		
		• 6	Show Block: De	fault Question	Block	(4 Questions	5)				Add I	Below	Move	Duplicate	Delete
		→ 4	End of Survey		Move	Duplicate	Customize	Delete							
		+ A	dd a New Element Here												
4	+ Add a New Eleme	ent Here													

16. Click the End of Survey button.

What do you wa	ant to add? Canc	el							
Block	№ Branch	ED E	mbedded Data	🔀 Randomizer		Neb Service		Text Sent	iment - Topic
Group	Authenti	cator	A End of Surv	ey	菌 Reference	e survey	🔳 Table	e of Contents	

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.

					non bioc	k (4 Que	estions	5)			Add Bel	w	Move	Duplicate	Delete
Ľ	Add a	End of Sur	vey Here		Mov	e Dupi	cate	Customize	Delete						
🔶 🛕 End of Surv	rey		Move	Duplicate	Customize	Delete		1							

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.

Branch on Successful Authentication				
Authentication Type: SSO V				
Associate Respondent With Panel			Need H	Help?
My Library: Qualtrics Support				
Identified By Field(s):				
Email V				
Capture respondent identifying info				
username = uid	•••			
i user_email = email	•••			
SSO Type: Shibboleth				
Connection UST Organization SSO 🗸				
This SSO type may not function properly with Preview Survey.				
	Move Duplicate	Options	Collapse	Delete
		options	- onopoo	20000

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

•	Authentication Attempts
3	
Authentica	ation Prompt Text
Please	log in. 👻
Authentica	ation Error Text
Unable	to log in with the information provided
Too Many	Failures Error Text
Too mai	ny failed log in attempts. Click next to continue. 👻
Allow au	thenticating respondents to retake authenticated section
Reload a	ny previously saved progress upon authentication
lt is stror	gly recommended that if you reload saved progress, only on
Authenti	cator exists in the survey flow and that it appears at the g of the survey. When reloading the recipient's saved progress
	prior to authentication will be discarded and replaced with
any data	invelvenced data. Additionally, it is an an an and the trees
any data their pre	viously saved data. Additionally, it is recommended that you
any data their pre- disable t	nousy saved data. Additionally, it is recommended that you he 'Allow respondents to finish later' option in the Survey
any data their pres disable t Options	vousty saved data. Additionally, it is recommended that you he 'Allow respondents to finish later' option in the Survey Menu. This option does not apply to Survey Previews.
any data their pre- disable t Options I Move au	Nousy saved data. Additionally, it is recommended that you he 'Allow respondents to finish later' option in the Survey Menu. This option does not apply to Survey Previews. thenticator to the beginning of the flow.

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



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

Apply

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



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

Options
General Language, title, survey description
Responses Survey expiration, incomplete responses, back button and more
Security Passwords, file uploads, bot detection and more

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
Select what to do with incomplete responses and indicate when they should be considered incomplete. Learn More
What should be done with incomplete survey responses?
 Record Delete
How much time should pass before they're considered incomplete?
Which respondent activity determines when to start the timer?
 Survey start time
Last time they edited a response
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.

	Builder
00	
P	
¶¢.	

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.

Collaborate on Project	: survey 2023.02.13					×
		٨.	dd Selected	User and G	iroup Address Book	
Collaborator	View Survey Edit	View Reports	Activate or C.	Сору	Distribute	
	The	e are currently no collabora	ators.			

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**).

Collaborate on Project: survey 2023.02.13		×
cchelp	Add Selected User and Group Address Book	
Users	Reports Activate or C Copy Distribute	
cchelp cchelp (cchelp#ust)	collaborators.	

4. Click the Add Selected button.

cchelp cchelp (cchelp#ust)

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.



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	Сору	Distribute
\aleph cchelp cchelp						

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.

XM		survey 2023.02.13 🗸
Survey	Ć	Home
Ê	dj.) Projects
E		Catalog
6	Ę	Workflows
₽] Directories
έλ λ	G	Library

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

XM = Directory							
C Segments	i≡ All lists						
💭 Lists	Shared folders						
🖉 Samples							

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

Create a list

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

Create a list	×
Create a list of selected contacts to send surveys and distributions	
List name Qualtrics Workshop	
Cancel Confi	rm

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.



Add Contacts by Uploading a File

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

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.								
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 <u>Support Pages</u> for more information.	Upload a file to Qualt Drag or select the UTF-8 enco	ics Workshop ed file that contains your contacts. We'll check it for common						
Once there are no errors, click Next to verify contact import conditions. Questions? Visit our <u>Support Pages</u> for more information. Download a sample template	errors and give you a summary again.	to review. Correct any errors in the file, and drag or select it below						
Questions? Visit our Support Pages for more information. Download a sample template <l< td=""><td>Once there are no errors, click</td><td>√ext to verify contact import conditions.</td></l<>	Once there are no errors, click	√ext to verify contact import conditions.						
 Download a sample template 	Questions? Visit our Support P	ges for more information.						
	Jownload a sample temp	ate						
		—						
Drag a file here or Select a file Delimiter Enclosure Comma (,) Ouble quote		^						
Drag a file here or Select a file Delimiter Enclosure Comma (,) Double quote								
Select a file Delimiter Enclosure Comma (,) V		Drag a file here or						
Delimiter Enclosure Comma (,) V Double quote V		Select a file						
Delimiter Enclosure Comma (,) V Double quote V								
Delimiter Enclosure Comma (,) V Double quote V								
Comma (,)	Delimiter	Fastanus						
Comma (,) V Double quote V	Deumiter	Eliciosofia						
	Comma (,)	✓ Double quote ✓						

2. Update the contents of the CSV file in Excel. First Name, Last Name and Email are mandatory, while External Data Reference is optional. Email should be filled with HKUST email address and External Data Reference should be filled with HKUST account username. Save and Close the file.

¢	AutoSave	e Off	ExampleConta	acts • Saved 🗸				𝒫 Search
	File Hom	e Insert	Page Layout	Formulas Data	Review	v View	Automa	ate Developer
Ľ	.5	• : 🖂	/ fx					
	Α	В	С	D		E		F
1	FirstName	LastName	Email	ExternalDataRefer	ence	Embedde	dDataA	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.

Image: Custom File	S open					~
Organize * New folder Microsoft Teams Notebooks Pictures Qualtrics Radica reg new comp so short cut - Docu TST FOLDER Taining This PC 3D Objects Desktop Downloads File name: ExampleContacts Custom Files Custom Files	\leftrightarrow \rightarrow \checkmark \bigstar \bigstar This PC \Rightarrow Downloads	~	Ō		ls	
Microsoft Teams Microsoft Teams Oualtrics Qualtrics Radica reg new comp short cut - Docu TEST FOLDER Training This PC 3D Objects Documents Documents Documents File name: ExampleContacts Custom Files Custom Files	Organize 🔻 New folder					?
File name: ExampleContacts	 Microsoft Teams Notebooks Pictures Qualtrics Radica reg new comp short cut - Docu TEST FOLDER Training This PC 3D Objects Dosktop Documents Downloads V Today (1) Today (1)<!--</th--><th>test_1_January 11, 2023_10.08</th><th></th><th></th><th></th><th></th>	test_1_January 11, 2023_10.08				
Upen Lancel	File name: ExampleContacts		~	Custom Files	Cancel	~

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.

XM = Direc	tory
C Segments	:Ξ All lists
D Lists	Shared folders
🖉 Samples	

Add Contacts Manually

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



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

Fill out o	r copy and paste your co	ntact data.					
Question	s? Visit our <u>Support Pag</u>	es for more information.					
	Email	Phone	First name	Last name	External data reference	Language	+
	cchelp@ust.hk		Service Desk	ITSC	cchelp		

3. Click the **Next** button.



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



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

XM = Dir	ectory
C Segments	☷ All lists
D Lists	Shared folders
🖉 Samples	

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.

Survey availability

You can leave your survey open for responses indefinitely or set a specific start and expiration time.

Leave survey open to collect responses

Set specific start and expiration date

4. Click the Edit survey availability button.

Edit survey availability

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			2
Select when you'd like the survey to sta	art and expi	re.	
Start date		Start time	
02.15.2023	Ë	12:00 AM	~
Expiration date		Expiration time	
03.15.2023	Ë	12:00 AM	~

6. Click the Save changes button.

Save changes

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



Activate Survey

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

Publish

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

Publish Survey Publishing will update the version seen by respondents. It can ta for respondents starting new survey sessions.	ike up to 5 minutes to reflect changes
Details User-published version	
Add a description for your version history	ExpertReview Survey strength: Great Recommendations: 1 View recommendations
	Cancel Publish

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.

Survey activated	×
Your survey has been successfully published and activated. You can distribute it using the anonymous l below. You can also navigate to the Distributions section to view more options. https://ust.az1.qualtrics.com/jfe/form/	ink
Okay	

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

Survey Worktows Distributions Data a Analysis Results Reports	Survey Workflows Distributions Data & Analysis Result	ts Reports
---	---	------------

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

Distribution summary	
Anonymous link	
Emails	

6. The page will display the survey link there.

Distribution summary	Get an anonymous survey link
Anonymous link	Paste this reusable link into emails or onto a website; it can't be tracked, and can't be used to identify respondents
🖸 Emails	https://ust.az1.qualtrics.com/jfe/form/C
😚 Personal links	A Read-only
😪 Social media	Copy survey link

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.



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.

To:	Select Contacts 🗸		
From:	Lists > Segments >	Q Search	Email S@ust.hk
When:	Send in 1 hour 🗸	+ New Contact List Use Contacts From a Library	
Cubicate		My Library: HKUST Qualtrics Support >	Q Search
Subject:	Invitation to take Qualr	Group Library: Hong Kong University of Science and > Technology	+ New Contact List
Message:	Load Message V	Group Library: ITSC >	Qualtrics Workshop (2) >
	E 1≣ (A) ⊠ Fe D D A- D-	Group Library: Test > 로 프 프 ★ → 幸 幸 날 플 := ☶ e	Qualtrics Workshop >
			Select Entire Contact List
			Samples >

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



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.

Send Preview Email					
То	qualtrics@ust.hk				
		Cancel	Send		

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

Send Now	Send in 1 hour
----------	----------------

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

Email to Recipient: Qualtrics HKUST Sent On: 16 Feb 2023 10:19 AM HKT	✓ 1 Email Sent Show Details	~
Schedule reminder		

Close Survey

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

Pause response co	llection
-------------------	----------

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



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.

Survey Workflows Distributions	Data & Analysis	Results	Reports
--------------------------------	-----------------	---------	---------

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

Data Table	Table Last Record Collected: 02/16/2023 10:39 AM HKT Active Recorded responses (2)			Active Recorded responses (2) V	Field Editor
Add Filt	er 🗸		< 1 of 1 > 50 ~	Export & Import V	
0	Recorded Date	Q1 - Do you like Qualtrics?	Q2 - Do you like Qualtrics? (2)	Q3 - How many hours do you usually use Qualtrics a day?	ŝ
0	Feb 16, 2023 10:39 AM	Yes	Yes	6	***
0	Feb 16, 2023 10:39 AM	Yes	Yes	3	

3. Click the "..." button and select View Response to view the details of the response.

	Last	Record Collected: 02/16/2023 10:39 AM HKT	Active Recorded responses (2) V	Field Editor	View Response
~		< 1 of 1 > 50 ~	Export & Import ~		Delete Response
Recorded Date	Q1 - Do you like Qualtrics?	Q2 - Do you like Qualtrics? (2)	Q3 - How many hours do you usually use Qualtrics a day?	¢	Retake Response
Feb 16, 2023 10:39 AM	Yes	Yes	6		Retake as New Response
Feb 16, 2023 10:39 AM	Yes	Yes	3		Export to PDF

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

(8) qualtrics ust	View Response	
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?		
Recorded: February 16, 2023 10:39 AM Duration: 00:00:10	< 1 of 2 >	Close

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.

				(25	Ē
	Recorded Date	Q1 - Do you like Qualtrics?	Q2 - Do you like Qualtrics? (2)	Q3 - How many hours do you usually use Qualtrics a day?		¢
	Feb 16, 2023 10:39 AM	Yes	Yes	6	g	
0	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.



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

Data Table			Last Record Collected: Never	Inactive	oonses in progress (1) 🗸 😽 Field E	Editor
Add Filter	Ý		< 1 of 1 > 50 ~	4	Export Data 🖌 [[]] Column choose	er 🗸
	Survey Session ID	First Name	Last Name	IP Address	Email	Extern
	FS_1220iyMrDrSegeP	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.

Survey Session ID	First Name	Last Name	IP Address	Email	External R
FS_122OiyMrDrSegeP	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.



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

C	lo	s	е	

Delete Response in Progress

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

				Θ	•
Survey Session ID	First Name	Last Name	IP Address	Email	Extern
FS_122OiyMrDrSegeP	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.



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.

Download a data table							
CSV TSV Excel XML SPSS Google Drive User-submitted files							
Comma separated values This is a .csv file that can be imported into other programs. Each value in the response is separated by a comma and each response is separated by a newline character. If your responses contain special characters and you will open this export in Microsoft Excel we recommend using the TSV export. Qualtrics CSV exports use UTF-8 encoding, which Excel will not open correctly by default. Learn more							
Numeric responses or choice text Use numeric values Use choice text Use choice text							
More options Cancel Download							

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

CSV	TSV	Excel	XML	SPSS	Google Drive	User-submitted files
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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
Oownload all fields
Numeric responses or choice text
O 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						
Туре	Last Updated					
csv (Table)	a few seconds ago					
		Close				
	Type csv (Table)	Type Last Updated csv (Table) a few seconds ago				

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



View Default Report

- 1. Click the Results tab.

 Survey
 Workflows

 Distributions
 Data & Analysis

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

Report: Default Report V Add F	Filter ~	Share Report 🗸	☆ ~
\prec Add Report Breakout 🗸 🗸	Q1 - Do you like Qualtrics?	Page Op	otions 🗸
Q Search Questions			
+ Create Custom Page			
Q1 - Do you like Qualtrics?	Ves		
• Q2 - Do you like Qualtrics? (2)			
A G3 - How many hours do you usually use Qualtrics a day?	No		
• Q4 - Submission Status(Please • state if you are adding, updating, or appending submission records)	0 0.2 0.4 0.5 0.8 1 12 1.4	1.6 1.8 2	2.2

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.

Add Filter 🗸	
٩١	
Saved Filters	>
Survey Metadata	>
Contact Fields	>
Q1 - Do you like Qualtrics?	
Q2 - Do you like Qualtrics? (2)	

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.

Q1 - Do you like Qualtrics?	~	ls v	1 - Yes 🗸
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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.

Export Report	
PDF Word PowerPoint	CSV
Q Search Pages	
Select All	SELECTED: 4
Q1 - Do you like Qualtrics?	
Q2 - Do you like Qualtrics? (2)	
Q3 - How many hours do you u	isually use Qualtrics a day?
Q4 - Submission Status(Please records)	state if you are adding, updating, or appending submission
	Cancel Export Pages

3. Click the Export Pages button.

Export Pages

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

Download Previous Exports							
	Created	Туре	Size				
Download	A few seconds ago	PDF	118KB	×			
				Done			

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