CREATING A SURVEY IN QUALTRICS - THE BASICS

Qualtrics is a web-based survey service for all HKBU Faculty, Students and Staff to support teaching and research at HKBU. By default, survey in Qualtrics is open to anyone. The SSOid control enablement in the Qualtrics can limit the surveys to be accessed and responded by the HKBU faculty, staff, students, alumni or departmental email account only. The following shows you how a survey owner can build a survey using the SSOid login protection with different user access domains.

Get an account in Qualtrics

Log in to Qualtrics

Use your SSO login with the following link:

https://chtl-bu.hkbu.edu.hk/qualtrics/

Click **Login to Qualtrics**

Set Time Zone and Language

Click your profile icon, select **Account Settings**

Change time zone

UTC +08:00 - Beijing, Hong Kong, Singapore, Taipei

Change language

Learn about partially supported languages

English (US)

You can change the correct **time zone** and the user interface **language** you prefer

Create your first survey

Create a survey

To start building a survey, you need to create a new Project

In the main page, click **menu** button, select **Project**

Click **Create project**

Click **Survey** icon and then click **Get started**

Enter the **Name** of your survey and click **Create project**

Create a new project

Survey

Name

My First Survey

How do you want to start your survey?

Create a blank survey project

Build your survey

In the **Survey** builder tab:

- Click on Question 1, select the question type (e.g., Multiple choice).
- Enter the question text and options.
- Click **Add new question** for additional questions.
- Click **Preview** to review your survey.
- Click **Publish** for generating a distribution link or email for next step

Tips: All changes in the survey will be saved automatically. However, you MUST click **Publish** to publish the changed content to participants.
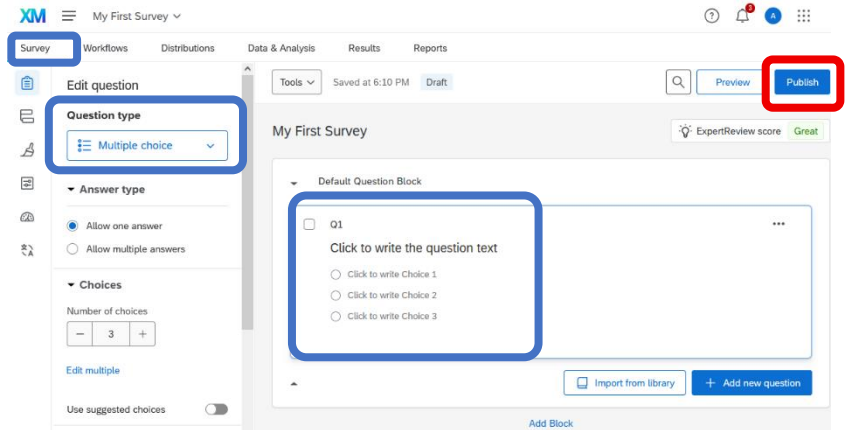
Distribute your survey
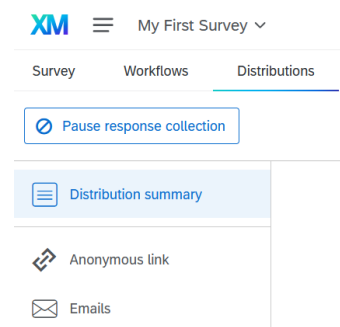
Switch to the Distributions tab and choose a method

You can select **Anonymous link** or **Emails** according to your usage

Anonymous link

You can post the link on the website or send it out through your own email

Emails

You can also compose email through Qualtrics system. Detail in next part.

Email Distribution

Clicked **Compose Email**

Edit the email subject and content and schedule the email.

You can create a new email list or send an email to an existing email list to distribute the survey.

Tips: The following text highlighted in blue under message is the individual link of your survey that it **CANNOT** be deleted
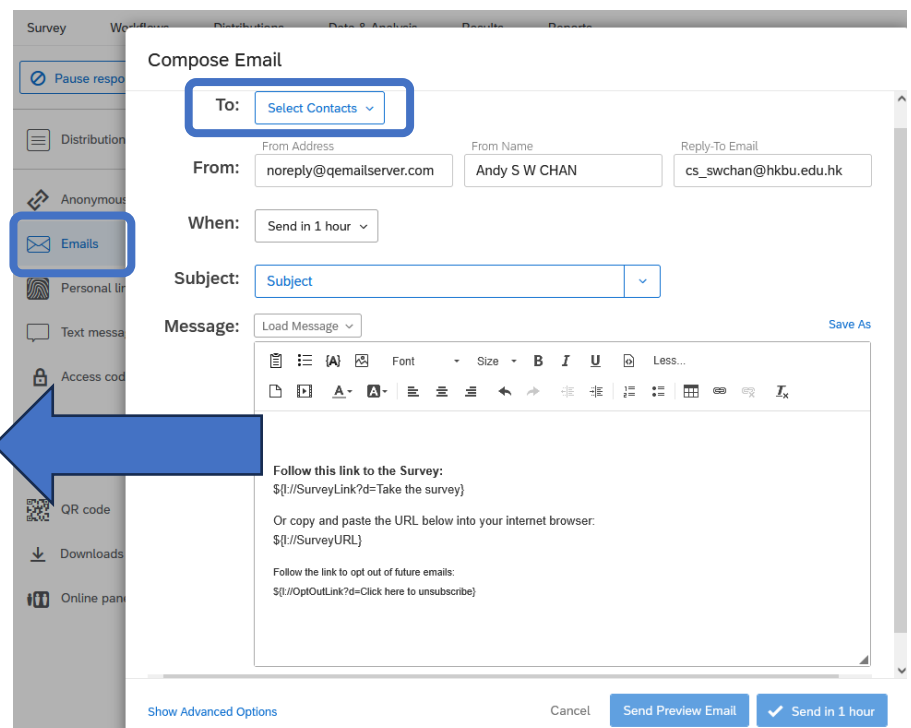
Follow this link to the Survey:
${l://SurveyLink?d=Take the survey}

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

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

Create a New Contact List

Click **Select Contacts** next to **To**: field and click **+New Contact List**

Enter the respondents' Email, First Name, and Last Name, then click **+Create**

Enter **Subject** and Select **When** to schedule the email distribution

Click **Send** to distribute the survey.

Bulk upload an Email List

Go to the main menu and select **Directories**

Manage your mail lists here.

Click **Create a list**, enter the list name, and click **Confirm**

Click **Upload a file**

Download the sample template (.csv file), and fill in the details (e.g. FirstName, LastName, Email

Contract List is looking a bit empty.
Get started by adding some contacts.

⬆
Upload a file
Add contacts by uploading a file from your computer.

✏
Manual input
Enter contacts manually or copy and paste from a spreadsheet.

Upload a file to Contract List
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.

⬇ Download a sample template

✓ Your file looks good! Now select **Next**

📄 ExampleContacts.csv
Select a different file

Delimiter
Comma (,)

Enclosure
Double quote

< Back   Cancel   Next >

Select the CSV file to upload and click the "Next" button

Confirm the import fields, click "Upload the file" to upload the email list

Select the CSV file to upload and click the **Next** button

Confirm import fields
To avoid having duplicate contacts in your directory, we'll automatically find and merge contacts with the same information in fields you've chosen in your identity resolution rules.

Your identity resolution rules:
1. **Email**
   If there's no Email field, or no duplicates found, the contact will be added as a new contact.
To edit the rules, reach out to your brand admin.

Field in your file	Import as field	First contact	Second contact	Third contact
FirstName	First name	John	Jane	Alice
LastName	Last name	Doe	Doe	Brown
Email	Email	john_doe@email.com	jane_doe@email.com	aliceb@email.com
ExternalDataReference	External data reference	12345	67890	67395
Department	Private list data	Marketing	Engineering	Engineering
City	Private list data	Denver	Seattle	San Francisco
Country	Private list data	USA	USA	USA

7/7 fields

< 1 of 1 >

Confirm the import fields, click **Upload the file** to upload the email list

< Back   Cancel   Upload the file >

Collect response

Switch to the **Data & Analysis** tab to view user responses

You can download the responds by clicking **Export & Import > Export Data…**

Survey   Workflows   Distributions   Data & Analysis   Results   Reports

Data   Text iQ   Stats iQ   Crosstabs iQ   Weighting   Audio & Video

Data Table   Last Record Collected: 05/22/2025 5:26 PM HKT   Active   Response Quality 100%   Recorded responses (4) ⌄   ⊞ Field Editor

▽ Add Filter ⌄   < 1 of 1 >   50 ⌄   ⬇ Export & Import   ⚙ Tools ⌄
                                                                      Column chooser ⌄

	Recorded Date	Q1 - Click to write the question text	⚙
☐	May 22, 2025 5:26 PM	Click to write Choice 1	…
☐	May 22, 2025 5:26 PM	Click to write Choice 1	…
☐	May 22, 2025 3:45 PM	Click to write Choice 2	…
☐	May 22, 2025 3:33 PM	Click to write Choice 1	…

< 1 of 1 >   50 ⌄   Review and Publish

Qualtrics.com   Contact Information   Legal

Download a data table

| CSV | TSV | Excel | XML | SPSS | Google Drive | User-submitted files | Tableau |

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

☑ Download all fields

Values or labels
○ Export values
● Export labels

More options   Cancel   Download

Select the file type e.g., CSV, EXCEL, SPSS… and click **Download**

(updated on 2 Jun 2025)