

# Creating a Survey in Qualtrics – The Basics

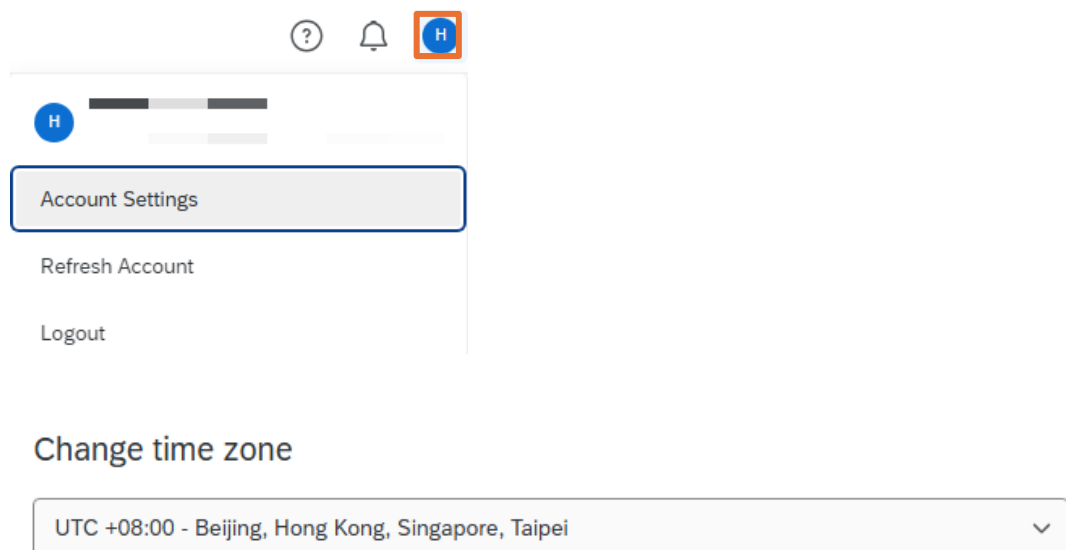
## 1. Log in to Qualtrics

- Use your EID login with the following link.

<https://go.cityu.hk/qualtrics>

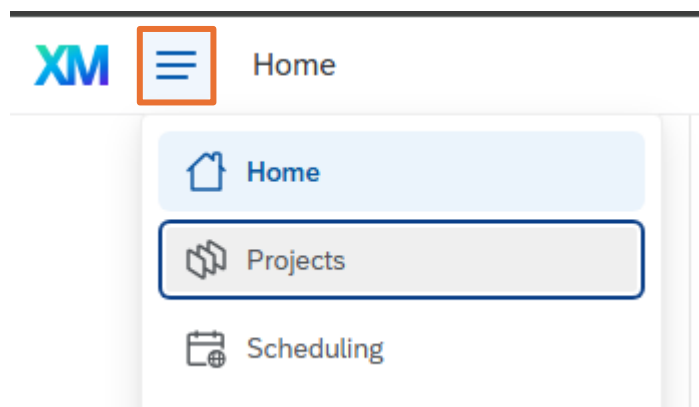
## 2. Set Time Zone (First-time login)

- Click your profile icon, select "Account Settings," and change the time zone to Hong Kong.



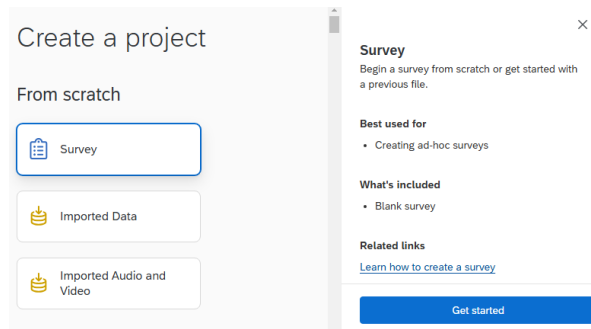
## 3. Create a Survey

- To start building a survey, you need to create a new "Project". Go to the main menu, click "Projects," then "Create Project". Choose to start from scratch or use a template.



a. Create a blank Survey

- Click the "Survey" icon and then "Get Started."



- Enter the survey/project name and click "Create project."

Create a new project

Survey

Name

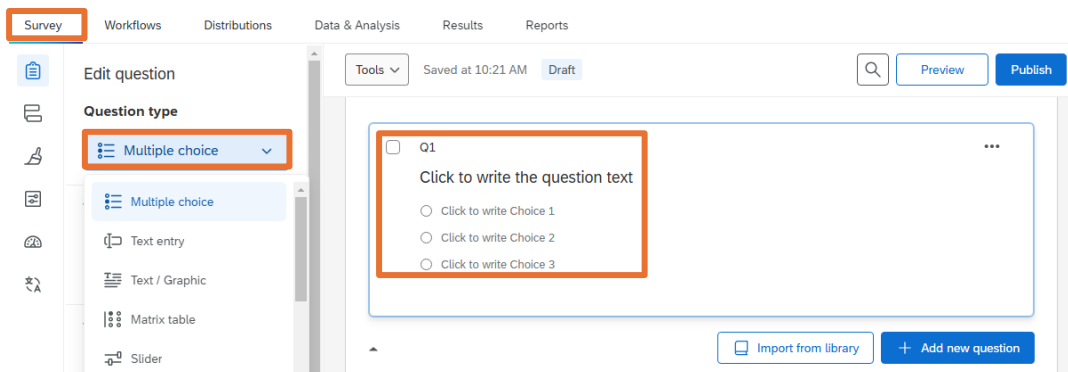
How do you want to start your survey?

Create a blank survey project

Create project

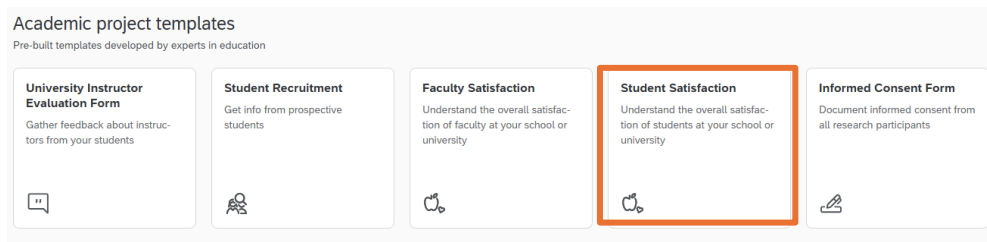
Cancel

- 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" to generate a distribution link.

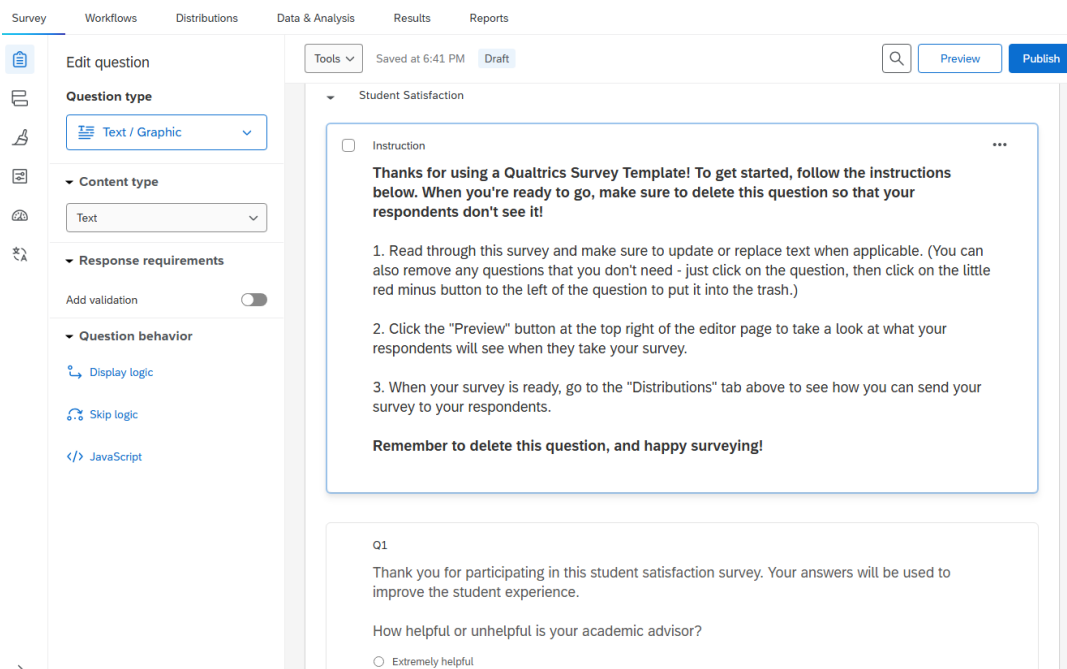


## b. Use Survey Templates

- Select a pre-built template (e.g., Student Satisfaction).

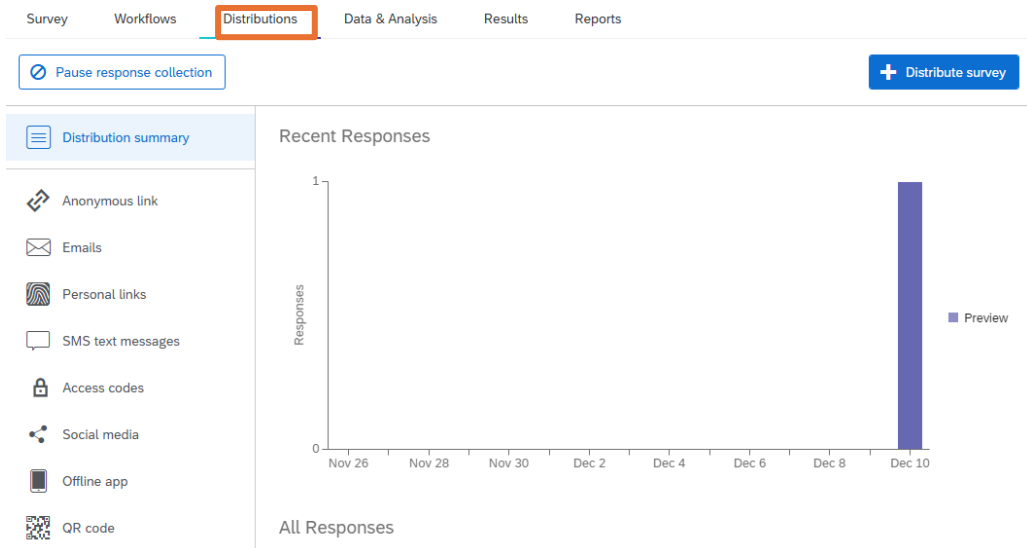


- Click “Get Started”, enter the survey title, and click the “Finish” button. It will pre-generate an introduction and questions for you to build the survey from the template.



#### 4. Distribute a survey

- Switch to the "Distributions" tab and choose a method (e.g., Anonymous link, Email, access code) in the "Distribution summary" to collect responses.



#### Email Distribution

- In the "Distribution" tab, select "Emails," then "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.

The screenshot shows the 'Compose Email' dialog box. The 'Emails' option in the sidebar is highlighted in orange. The dialog box contains the following fields and options:

- To:** Select Contacts
- From:** From Address: noreply@qemailserver.com, From Name: Chan Dai Man, Reply-To Email: dm.charn@cityu.edu.hk
- When:** Send in 1 hour (highlighted in orange)
- Subject:** Subject
- Message:** Load Message, Save As

The message content includes:

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

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

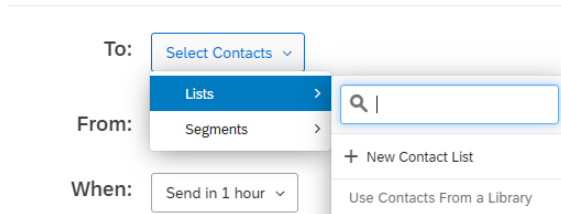
Follow the link to opt out of future emails:

Buttons at the bottom: Show Advanced Options, Cancel, Send Preview Email, Send in 1 hour (highlighted in orange).

## Create a New Email List

- Select "Contacts" and click "New Contact List."

### Compose Email



To:  ▾

From:  ▾

When:  ▾

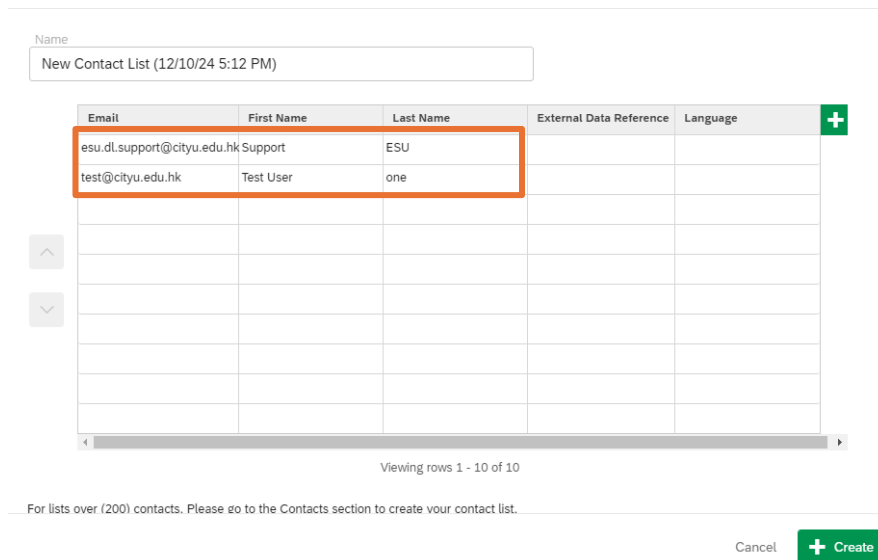
|

+ New Contact List

Use Contacts From a Library

- Enter the respondents' Email, First Name, and Last Name, then click "Create."
- Click "Send" to distribute the survey.

### Create Contact List



Name

New Contact List (12/10/24 5:12 PM)

Email	First Name	Last Name	External Data Reference	Language	
esu.dl.support@cityu.edu.hk	Support	ESU			
test@cityu.edu.hk	Test User	one			

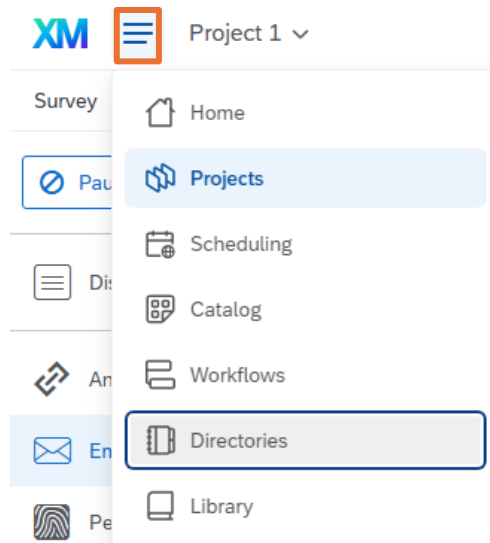
Viewing rows 1 - 10 of 10

For lists over (200) contacts. Please go to the Contacts section to create your contact list.

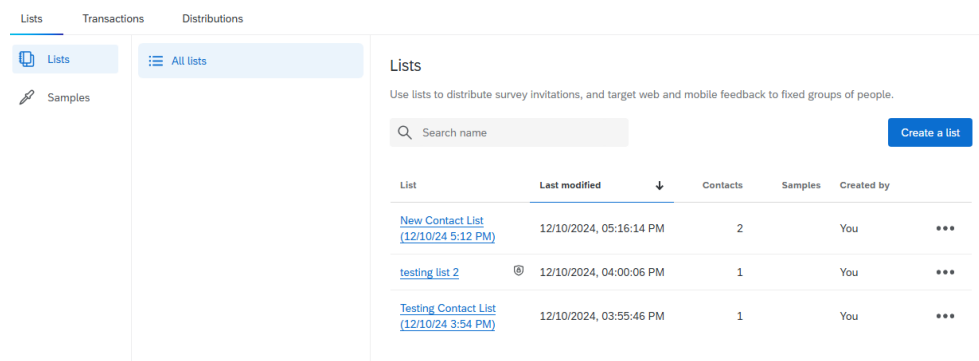
Cancel

## Bulk upload an Email List

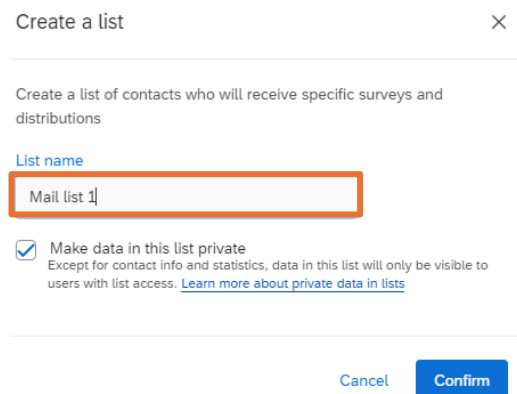
- Go to the main menu and select "Directories."



- Manage your mail lists here.



- Click "Create a list," enter the list name, and click "Confirm".



- Click "Upload a file," download the sample CSV template, and fill in the details (e.g. FirstName, LastName, Email)

	A	B	C	D	E	F
1	FirstName	LastName	Email			
2	John	Doe	john_doe@email.com			
3	Jane	Doe	jane_doe@email.com			
4	Alice	Brown	aliceb@email.com			
5	Bob	Johnson	b.johnson@example.com			
6	Eve	Smith	esmith@example.com			
7	Thomas	Moreau	thomas.moreau@company.com			
8	Ian	White	ian_white76@mail.com			
9	Chelsey	O'Neil	chelsey@mail.com			
10	Anita	Singh	anita.singh@company.com			
11	Liu	Xiang	liu.xiang@company.com			

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

#### Upload a file to Mail list 1

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

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

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

[Download a sample template](#)

✔ Your file looks good! Now select Next

📄 ExampleContacts.csv  
Select a different file

10 contacts

Delimiter

Comma ( , )

Enclosure

Double quote

< Back
Cancel **Next >**

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

#### 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 null 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.c	jane_doe@email.coi	aliceb@email.com

3/3 fields

< 1 of 1 >

< Back
Cancel **Upload the file >**

## 5. Collect Response

- Switch to the “Data & Analysis” tab to view user responses.

The screenshot displays the Qualtrics Data & Analysis interface. At the top, there are navigation tabs: Survey, Workflows, Distributions, **Data & Analysis** (highlighted with an orange box), Results, and Reports. Below these are sub-tabs: Data, Text iQ, Stats iQ, Crosstabs iQ, and Weighting. The main content area is titled "Data Table" and shows "Last Record Collected: 12/11/2024 9:36 AM HKT" and "Active" status. It indicates "Recorded responses (3)" and provides a "Field Editor" link. Below the table header, there are controls for "Add Filter", pagination ("1 of 1"), "Export & Import", "Tools", and "Column chooser". The data table itself has columns for "Recorded Date", "Q2 - Why you like it?", and "Q1 - What is your favorite fruit?". Three rows of data are visible, each with a checkbox in the first column and a gear icon in the last column.

<input type="checkbox"/>	Recorded Date	Q2 - Why you like it?	Q1 - What is your favorite fruit?	⚙️
<input type="checkbox"/>	Dec 11, 2024 9:36 AM	like the color	orange	⋮
<input type="checkbox"/>	Dec 11, 2024 9:36 AM	sweet	Apple	⋮
<input type="checkbox"/>	Dec 10, 2024 2:47 PM			⋮

## 6. References

[XM Community](#)

[Qualtrics Support Page](#)

[XM Basecamp: Learn Qualtrics with On-demand Training](#)