

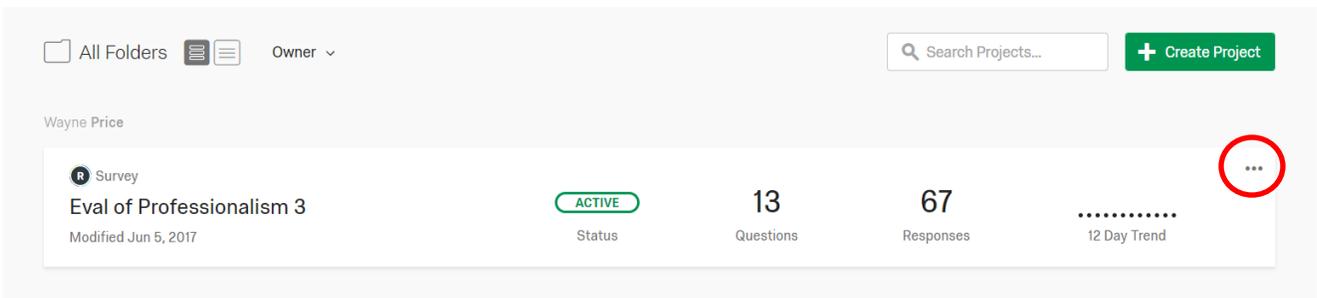
Sharing Access to Qualtrics Surveys at UNC

Updated August 22, 2018 by Teresa Edwards

This document describes how to share access to a survey with another Qualtrics user. If you frequently share multiple surveys with the same group of individuals, you may request to have a Qualtrics Group set up to facilitate sharing. Groups are discussed on page 3.

Sharing a Survey

To share access to a survey with another user, on the Projects page, click the Dropdown on the far right next to the survey you wish to share. Depending on your page view, this could either be a drop-down arrow or three dots.



Choose “Collaborate”. Note that if this option is grayed out, that means you are not the current owner of the survey. Only the survey owner has the ability to collaborate with others.

In the pop-up box, type part of the user’s name or email address (**not their Onyen!**) into the search box, or click ‘User and Group Address Book’ and choose from a list.

When the person or group is identified and you click Add, Qualtrics will prompt you to write a message to accompany the notification it will send to your collaborator, alerting them that a survey has been shared with them. After writing your message and clicking “OK,” your collaborator’s name appears with options next to it. Use the checkboxes next to their name to give the person permission to do as much or as little as you wish with this survey. By clicking the word “Details” under Edit or View Reports, you can specify even more precisely which types of actions the collaborator should be allowed to do.

Type Username or Email... Add User and Group Address Book

| User | Edit | View Reports | Activate/Deactivate | Copy | Distribute |
|------------------------|---|---|-------------------------------------|-------------------------------------|--|
| PPP Recipient Database | <input checked="" type="checkbox"/> Details | <input checked="" type="checkbox"/> Details | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> ⊖ |

- Edit Survey Responses
- View Survey Results
- Filter Survey Results
- View Restricted Data
- Download Survey Results
- Use Cross Tabs
- View Response ID

Cancel ✔ Save

If/when you no longer want to share the survey with this person, simply click the red “-” next to their name on this screen to remove their access.

Once you have set Collaborate, the survey will appear on your collaborator(s) “Projects” page as well as on your own. They will be able to do with the survey everything you have given permission for, just as if the survey was in their own account.

Do You Need a Qualtrics Group?

If you repeatedly need to Collaborate with the same group of individuals, a Qualtrics administrator can set up a Qualtrics Group. Then, you follow the same procedures for sharing a project, but you search for the name of the Group and set the permissions only once for each survey for all members of the group (instead of having to search for each person’s name individually).

Another reason for a Group is if collaborators need to share items stored in a Qualtrics library—the place where images, message texts, lists of participants (contacts), and other peripheral parts of a survey project may be stored. To share these items with others, you need a Group, which automatically has its own Library. It takes a bit of adjustment to using the Group Library; the owner of a library item must specifically put it into the Group Library to make it accessible to others.

Keep in mind that if a single person does all the development and editing of a survey instrument and others just need to review it to provide feedback, the reviewer does not even need a Qualtrics

account. The developer can Preview the survey and send the link from the Preview window to the reviewer(s), who will be able to proceed through the survey as if taking it like a respondent.

If you believe you need a Group, contact the appropriate UNC Qualtrics administrator from the list below **after all persons have created their Onyen-based Qualtrics accounts**. An Onyen-based UNC account is created once a user logs into Qualtrics using their Onyen and password at <http://qualtrics.unc.edu>. Indicate the short name or acronym you would like assigned to your Group and the full names (not Onyens) of the persons who should be included.

| Your Affiliation | Qualtrics Administrator | Contact Info |
|-------------------------------|-------------------------|--|
| Medicine | Peter Starback | peter_starback@med.unc.edu |
| Nursing | Jeff Szczypinski | jeffsz@email.unc.edu |
| Pharmacy | ITSOP | itsop@unc.edu |
| Psychology | Hugh Meriwether | hmeriwet@email.unc.edu |
| Public Health | Andrew Ochs | andrew_ochs@unc.edu |
| School of Government | Brian Fodrey | fodrey@sog.unc.edu |
| Frank Porter Graham Institute | Jeff Alpi | alpi@unc.edu |
| All others | Odum Institute | qualtrics@unc.edu |

Longevity of Groups and Survey Owners Who Leave UNC

Many UNC Qualtrics Groups are composed of students or others whose surveys are expected to live on after they leave UNC. In these situations, it is critical that, when sharing the survey with the Group, the owner gives the Group full permissions to edit, report, activate/deactivate, copy, and distribute the survey. With these permissions granted, the remaining members of the group will be able to “keep the survey alive” and interact with it just as if it were in their own account, even though the owner of record (the departed student or employee) can no longer log into their Qualtrics account. Additionally, ownership of a survey can be transferred between UNC users. In order to do so, the survey owner needs to email the appropriate Qualtrics Administrator with the survey name and the name of the new owner of the survey. This new owner will also need to give permission to accept ownership of this new survey.

The remainder of this document provides direction on using a Group Library.

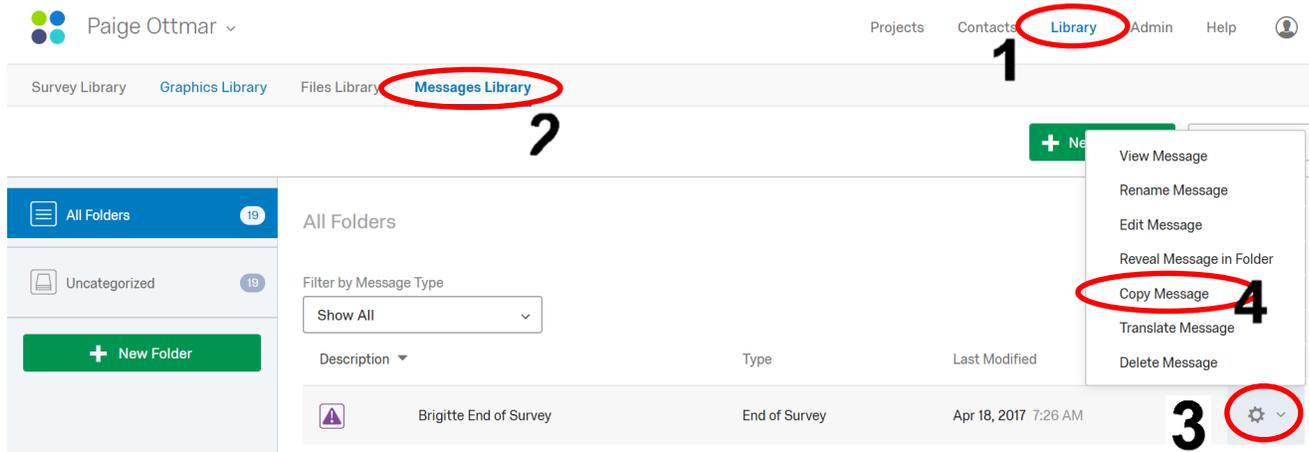
Using the Group Library

Once an administrator has created your Group, you can copy, move, or create items in the Group’s Library where they can be accessed by all members of the group. Below are a few examples of things you may need to do to get your Group Library operational.

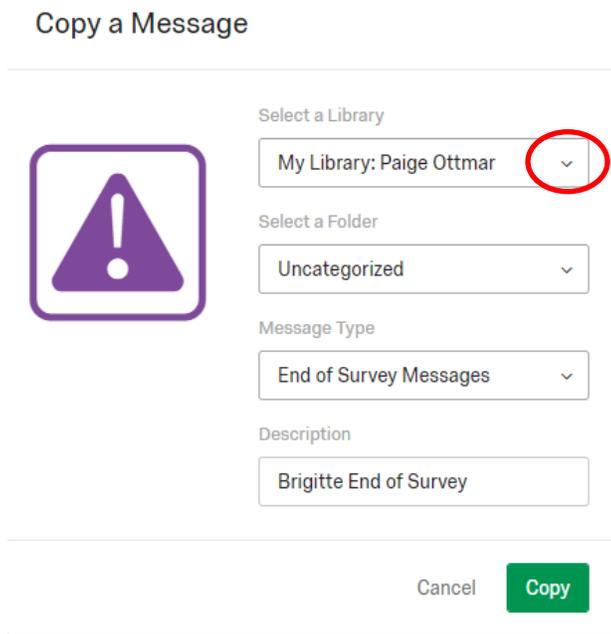
A. Copying an Invitation Message to the Group Library

1. Click on the Library menu option
2. Navigate to the Messages Library.
3. Click the “Gear” dropdown icon next to the message you wish to copy.

4. Choose "Copy Message."



5. In the dialog box that opens, use the Dropdown for 'Select a Library' to select your Group Library. You also have the ability to select a specific folder within the Group Library, if applicable. Finally, select the correct message type from the drop-down list.



6. Enter the Description and click 'Copy.' A copy of your message now exists in the Group library and can be accessed by all members of your Group.

B. Moving a Contact List to the Group Contacts Library

NOTE: In most places, the Qualtrics interface uses the words “Contacts” and “Contact Lists.” In a few places, however, the old label of “Panels” still appears. A Panel is the same thing as a Contact List.

1. Click on the Contacts menu option.
2. Click the dropdown arrow for the contact list you wish to place into the Group Library.
3. Choose “Move List.”

The screenshot shows the Qualtrics interface. At the top, the user name 'Paige Ottmar' is visible. The navigation menu includes 'Projects', 'Contacts', 'Library', 'Admin', and 'Help'. The 'Contacts' menu item is circled in red and has a '1' next to it. Below the navigation, there are buttons for '+ Create Sample' and '+ Create Contact List', and a search bar for 'Search Contact Lists...'. On the left, there is a sidebar with 'All Folders' and 'Uncategorized' sections, and a '+ New Folder' button. The main content area displays a table of contact lists. The first row is for 'BU' with 2,798 members and a 'Mailing List' type. The second row is for 'Dharitri HR (11/3/17 10:36 AM)' with 1 member and a 'Mailing List' type. The third row is for 'Final African MPs' with 1,545 members and a 'Mailing List' type. A dropdown menu is open for the 'Dharitri HR' row, showing options: 'Export List...', 'Import List...', 'Send Email to List...', 'Edit List Details...', 'Move List ...', and 'Delete...'. The 'Move List ...' option is circled in red and has a '3' next to it. The dropdown arrow for the 'Dharitri HR' row is circled in red and has a '2' next to it.

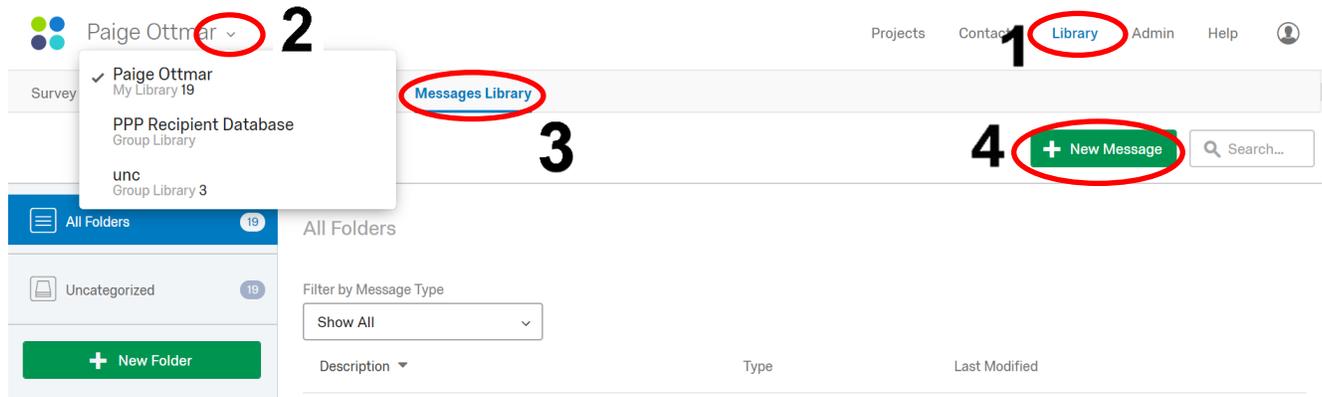
4. In the dialog box that opens, use the Dropdown for ‘Destination Panel Library’ to select your Group Panels Library.

The screenshot shows the 'Move List' dialog box. It has a title bar 'Move List'. Below the title bar, there is a section for 'Destination Panel Library' with a dropdown menu labeled 'Select Library' and a red circle around the dropdown arrow. Below that, there is a 'Panel Name' field with the text 'Future' entered. At the bottom right, there are two buttons: 'Cancel' and 'Move List'.

5. Enter the Panel Name and click ‘Move List.’ This panel is now located in the Group Contacts List and can be accessed by all members of your Group.

C. Creating a Message in the Group Library

1. To create a message that will automatically be accessible to the entire Group, select the Group Library before creating the message, then proceed with creating the message as normal.



The message will be stored in the Group Library accessible to all members.