

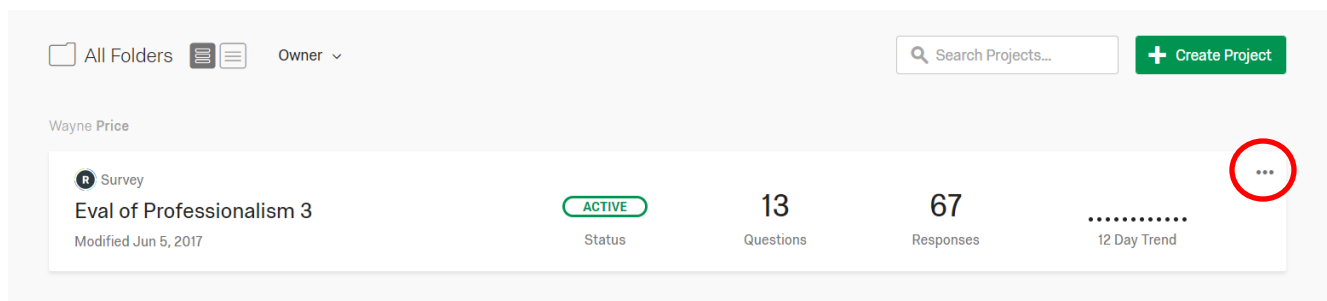
Sharing Access to Qualtrics Surveys at UNC

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.

All Projects
Owner ▾
Search Projects...
+ Create Project

Type	Project Name	Actions ...
★ Survey	Eval of Professionalism 3	<div> Close Collaborate Reveal in Folder Rename Project Copy Project Edit Survey Preview Survey Translate Survey Distribute Survey Data & Analysis View Reports Delete Project </div>
★ Survey	Lempp - WI (Complete) & SD, VA (Incomplete)	▾
★ Survey	Hawaii Dataset 2	▾
★ Survey	Cofer	▾
★ Survey	Rossi - Complete California and Delaware	▾
★ Survey	PPP Db-1, Alan Sides (Complete: TX, AR) (Incomplete: xxx)	▾
★ Survey	QC Survey Paige Ottmar	▾
★ Survey	Paired Comparison Three Part 2	▾
★ Survey	Hawaii Dataset 4	▾

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.

Add
[User and Group Address Book](#)

User Edit View Reports Activate/Deactivate Copy Distribute

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.

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
 ☒ Download Survey Results
 ☒ View Survey Results
 ☒ Use Cross Tabs
 ☒ Filter Survey Results
 ☒ View Response ID
 ☒ View Restricted Data

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.

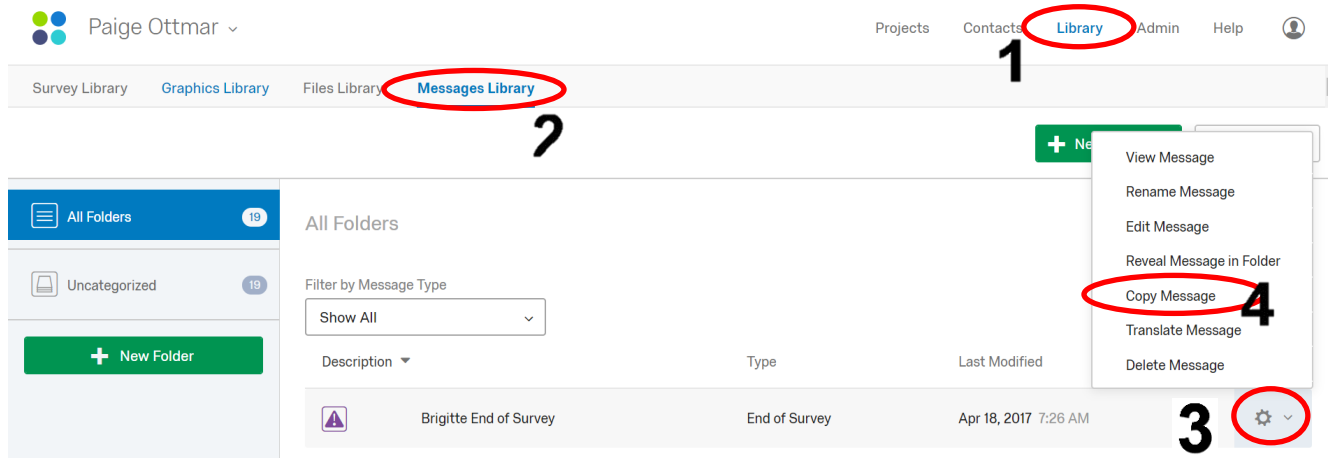
Using the Group Library

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.

Copy a Message




Select a Library
My Library: Paige Ottmar 

Select a Folder
Uncategorized 

Message Type
End of Survey Messages 

Description
Brigitte End of Survey

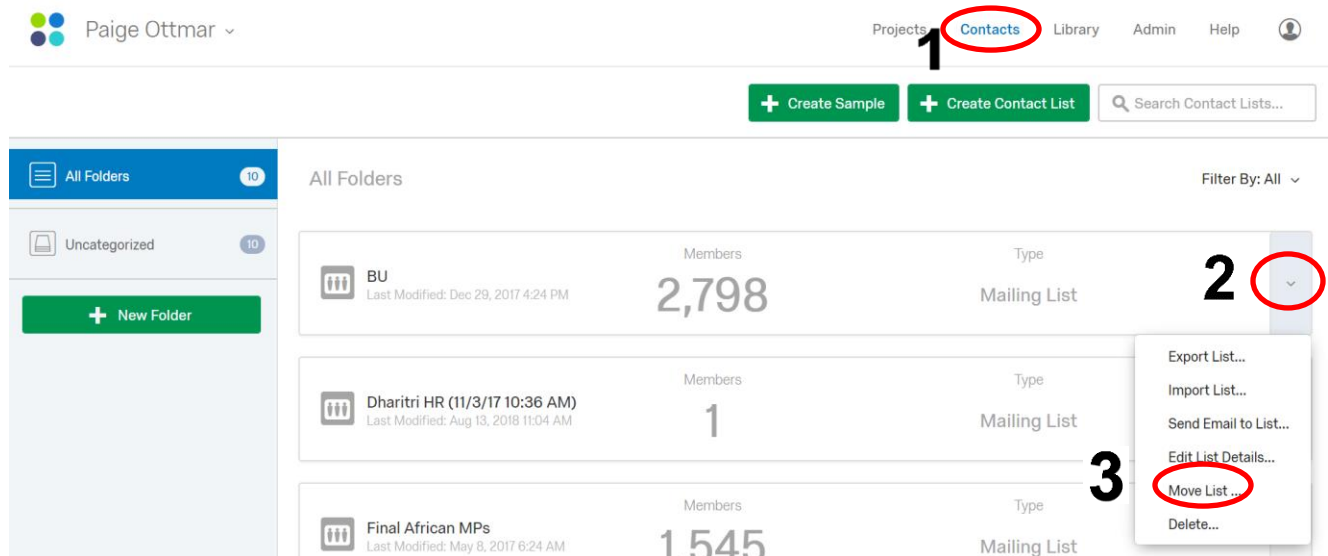
Cancel 

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.”



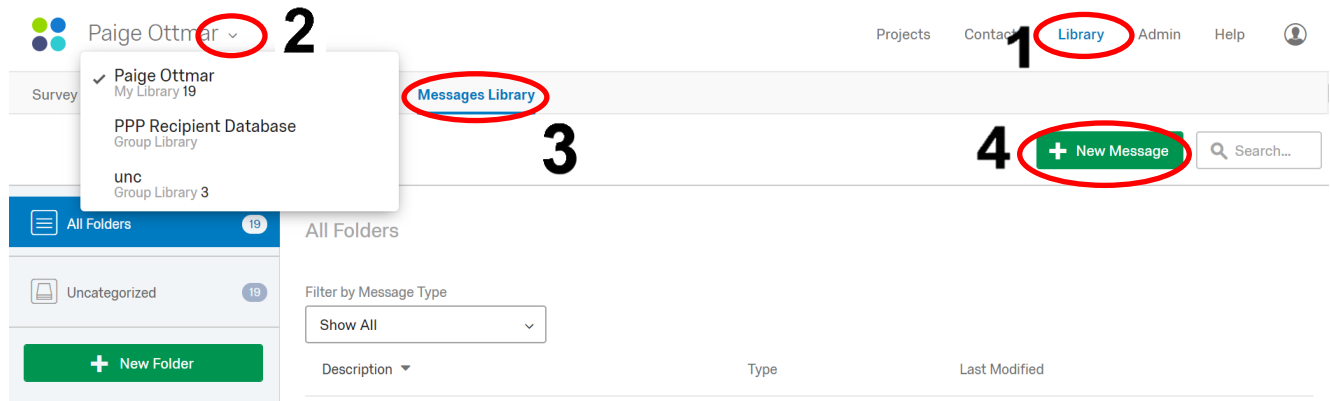
4. In the dialog box that opens, use the Dropdown for ‘Destination Panel Library’ to select your Group Panels Library.

The 'Move List' dialog box is shown. It has a title bar 'Move List'. Below the title bar, there is a section 'Destination Panel Library' with a dropdown menu labeled 'Select Library' (circled in red). Below this, there is a 'Panel Name' section with a text input field containing the word 'Future'. 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.