



## Migrating from Contacts to XM Directory Help Document Odum Institute April 2023

Qualtrics “Contacts” has been deprecated, and our brand will be migrated to the improved [XM Directory](#) Lite platform.

This migration will occur in the coming weeks and will happen behind the scenes. During the migration, there will be no associated downtime. We have been assured by Qualtrics that access to your contacts will remain intact, and there will be no interruptions to distributions, API calls to contacts, or other functionality associated with contacts.

Please see below for information about migrating to the new XM Directory Lite.

**For more information detailing this migration, please visit the Qualtrics support page [HERE](#).**

### What to expect:

- 1) You will be able to access your contacts as usual. However, the name of the “Contacts” tab in the navigation menu will change to “Directories”. To access XM Directory, go to the **Directories** tab in the global navigation menu.

The screenshot shows the XM Directory interface. On the left, a navigation menu is open, with 'Directories' highlighted and circled in red with the number '1'. The main content area displays a 'Lists' table with the following data:

List	Last modified	Contacts	Samples	Created by
<a href="#">Customers 2022</a>	04/01/2022, 09:06:23 AM	1		You
<a href="#">Day 5</a>	07/19/2019, 12:17:59 PM	4		You
<a href="#">New Contact List (7/22/19 1...</a>	07/22/2019, 09:05:43 AM	1		You
<a href="#">Sensitive Email</a>	08/15/2019, 08:40:16 AM	1		You
<a href="#">sms</a>	10/23/2019, 02:45:15 PM	1		You


Then click **Contacts**:

  Directories

Employee Experience

 Employee Directory

XM Directory

 Contacts Directory <sup>2</sup>

2) Notable changes include:

- Consolidating duplicate “contacts” in a mailing list is now available under the List Options drop down.
- If you are adding contacts from a survey, please review [these instructions](#) to learn how to accomplish this same task in XM Directory.
- The XM Directory trims white space at the end or the beginning of the embedded data field name.
- To prevent duplicate embedded data after the migration, Qualtrics will replace white space with double underscores. For example, a brand that has two embedded data fields named “Age” and “ Age”. After the migration, “Age” and “\_\_Age” will be displayed as two distinct embedded data fields in the directory for the brand.
- Shared mailing lists are no longer in separate libraries accessed via a dropdown menu. Each user group will now appear as a folder in a left navigation pane.
- See [Migrating from Contacts to XM Directory \(qualtrics.com\)](#) for a chart outlining changes.

For questions or assistance with this migration, you may reach out to the Odum Institute via email here: [qualtrics@unc.edu](mailto:qualtrics@unc.edu).

**Drop-In Qualtrics Consulting Hours:**

Tuesdays 10am-12pm 228D, Davis Library

Tuesdays 2pm-4pm Virtual [Click here during regular hours to access the waiting room.](#)

Wednesdays 10am-12pm Virtual [Click here during regular hours to access the waiting room.](#)

Thursdays 1pm-3pm 228D, Davis Library

To request a virtual appointment outside these hours, email [qualtrics@unc.edu](mailto:qualtrics@unc.edu)

The Odum Institute for Research in Social Science is located in Davis Library on the 2<sup>nd</sup> Floor.

For more information about the Odum Institute, visit <http://www.odum.unc.edu>