

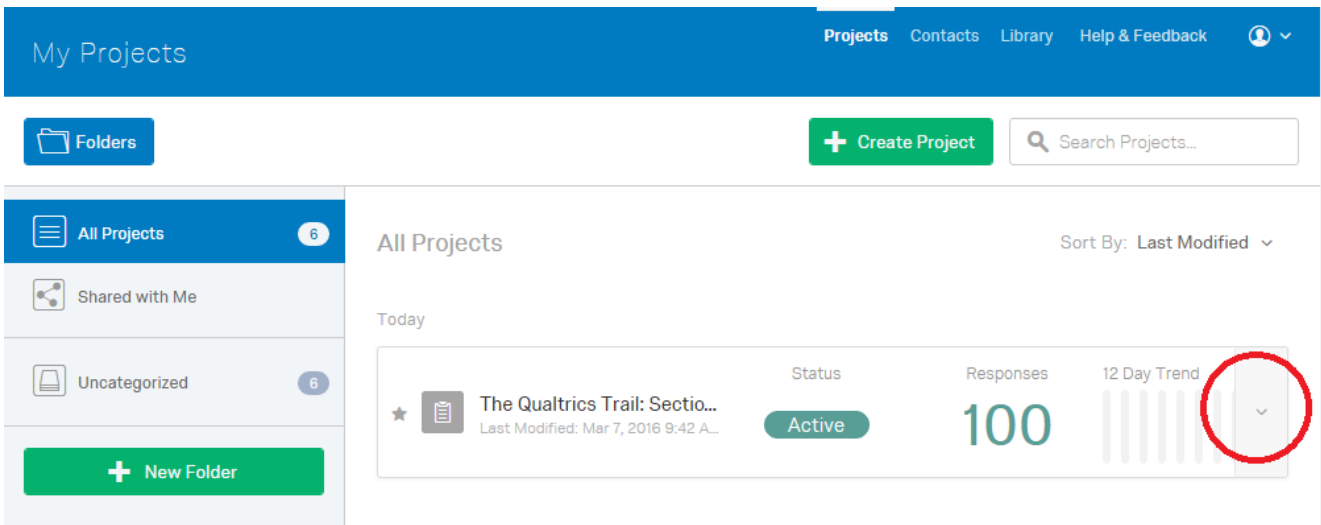
Sharing Access to Qualtrics Surveys at UNC

Updated March 8, 2016 by Teresa Edwards

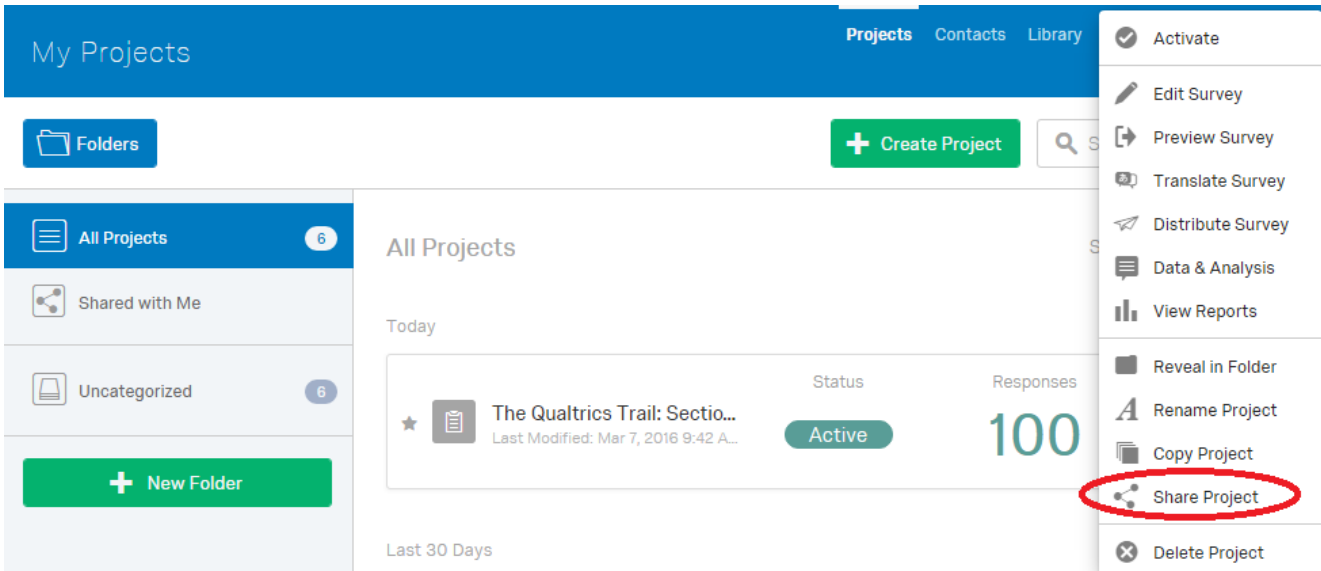
This document describes how to share access to a survey with another Qualtrics user. If you frequently share multiple surveys with the same group of individuals, you may request to have a Qualtrics Group set up to facilitate sharing. Groups are discussed on page 3.

Sharing a Survey

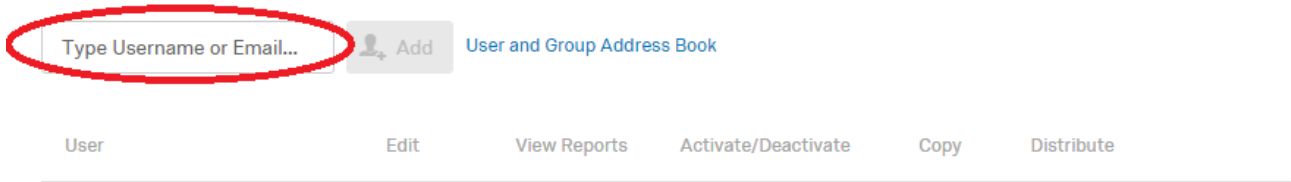
To share access to a survey with another user, on the My Projects page, click the Dropdown on the far right next to the survey you wish to share.



Choose "Share Project."

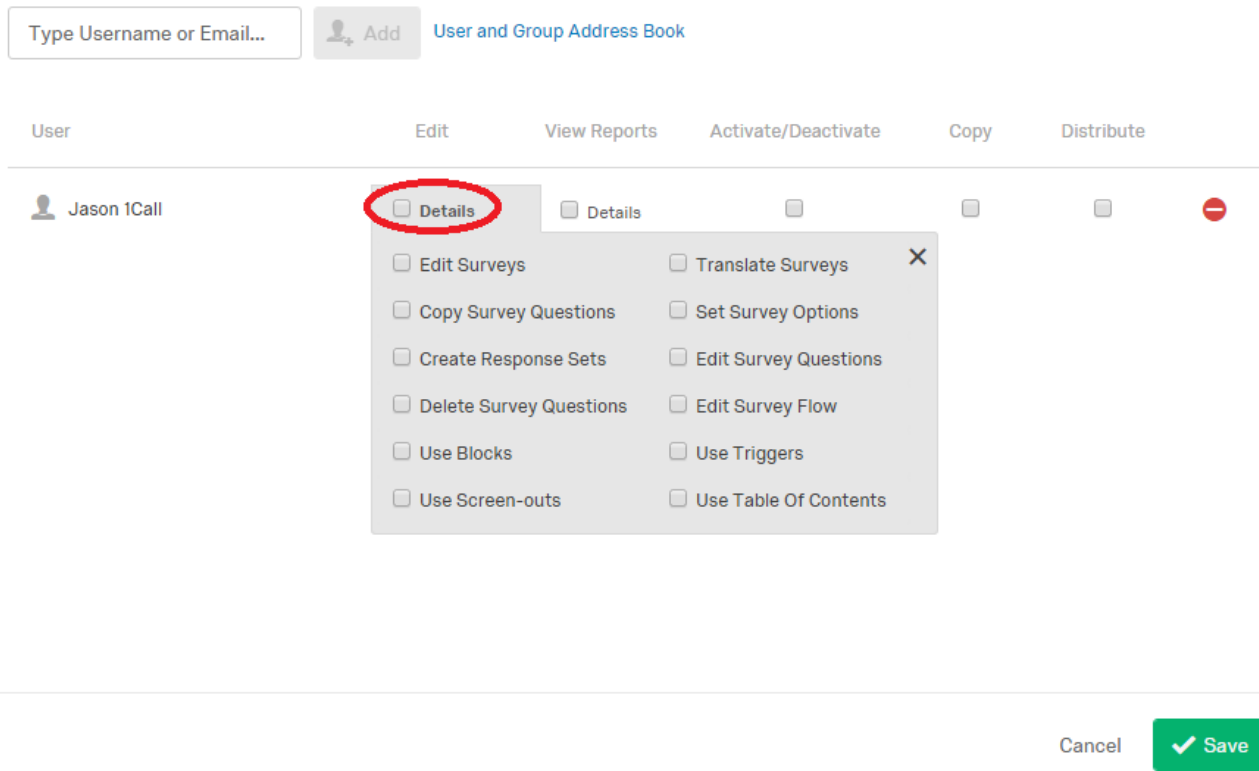


In the pop-up box, type part of the user's name or email address (**not their onyen!**) into the search box, or click 'User and Group Address Book' and choose from a list.



When the person or group is identified, click Add and their name appears with options next to it. Use the checkboxes 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 Results, you can specify even more precisely which types of actions the collaborator should be allowed to do.

Share Project: The Qualtrics Trail: Section 6 - Copy



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 Sharing, the survey will appear on your collaborator(s) "My 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 (panels), and other peripheral parts of a survey 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**. 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	Jason Morningstar	jason_morningstar@unc.edu
Pharmacy	Deric Freeman	deric_freeman@unc.edu
Psychology	Hugh Meriwether	hmeriwet@email.unc.edu
Public Health	Andrew Ochs	andrew_ochs@unc.edu
School of Government	Rob Moore	rob_moore@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.

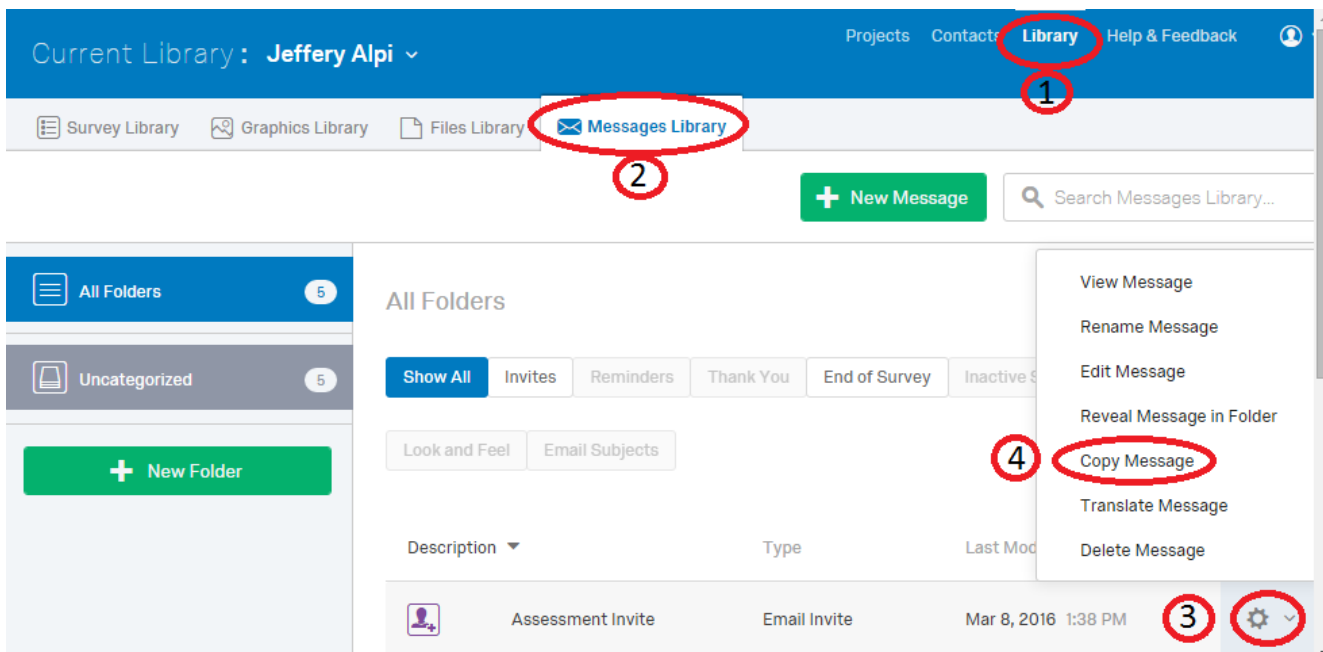
The remainder of this document provides direction on using a Group Library.

Using the Group Library

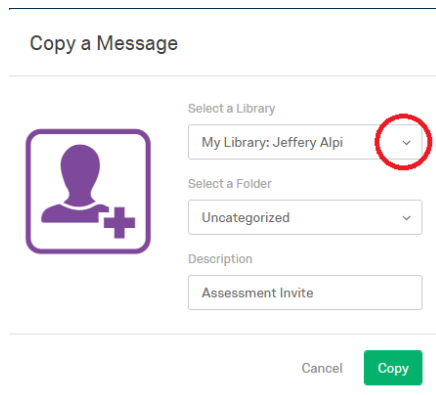
Once an administrator has created your Group, you can copy, move, or create items in the Group's Library where they can be accessed by all members of the group. Below are a few examples of things you may need to do to get your Group Library operational.

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 Panels Library.

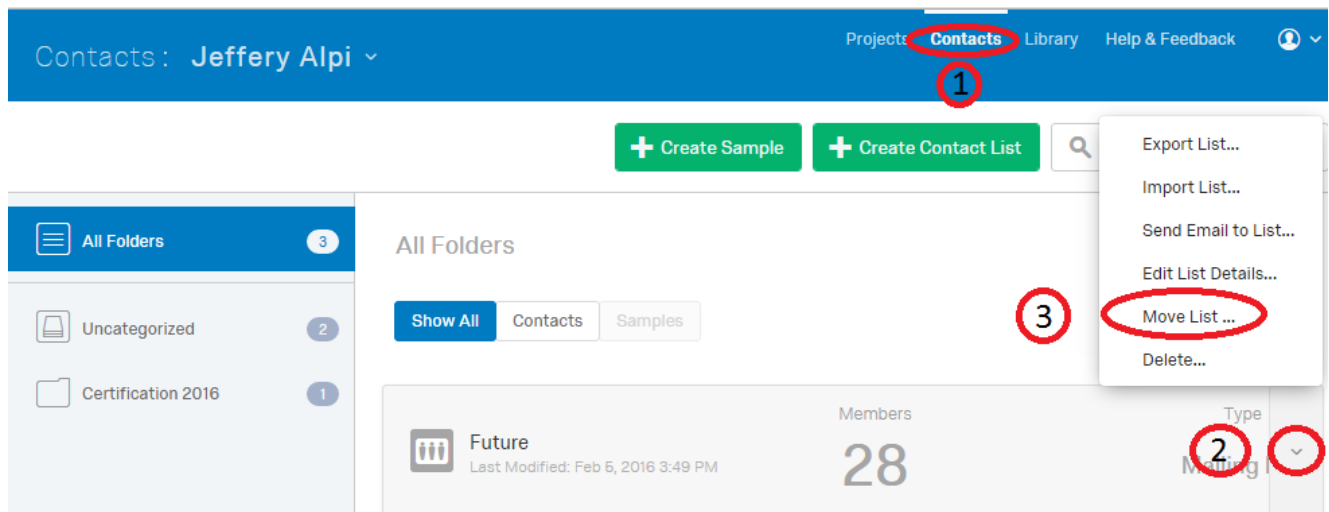


6. Enter the Folder and Description as desired, and click 'Copy.' This item now exists in the Group library and can be accessed by all members of your Group.

B. Moving a Contact List to the Group Contacts Library

NOTE: The new Qualtrics interface uses "Contacts" and "Contact Lists" in place of "Panels."

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."



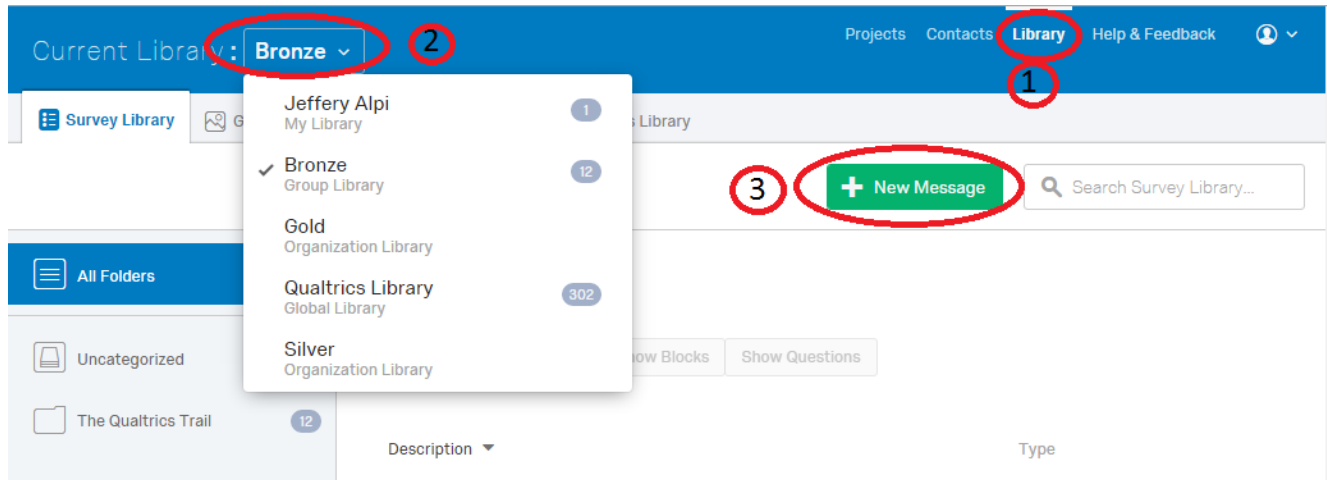
4. In the dialog box that opens, use the Dropdown for 'Destination Panel Library' to select your Group Panels Library.

The 'Move List' dialog box is shown. It has a title 'Move List'. Below the title, there is a section for 'Destination Panel Library' with a dropdown menu labeled 'Select Library' circled in red. Below that is a 'Panel Name' field with the text 'Future'. At the bottom, there are 'Cancel' and 'Move List' buttons.

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.