



Sharing Access to Qualtrics Surveys at UNC

Updated July 2023

This document describes:

- 1) How to share access to ('collaborate') a survey with another Qualtrics user, and
- 2) Sharing contact lists, library messages, files, or copies of surveys to a group of individuals (page 3).

NOTE: If a single person develops and edits a survey instrument and others just need to review it to provide feedback, the reviewer does not 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.

Sharing a Survey

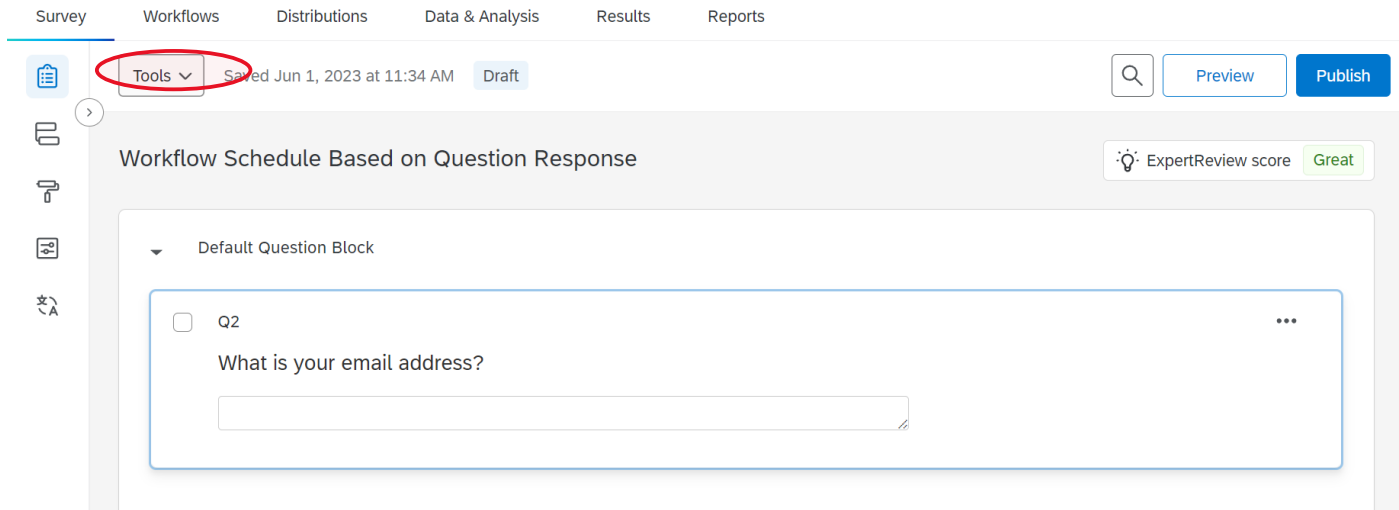
- 1) To share access to a survey with another user, there are two options:
 - a. Navigate to the "Projects" page, click the three dots on the far right next to the survey you wish to share.

Projects and Programs > Testing Surveys Create project

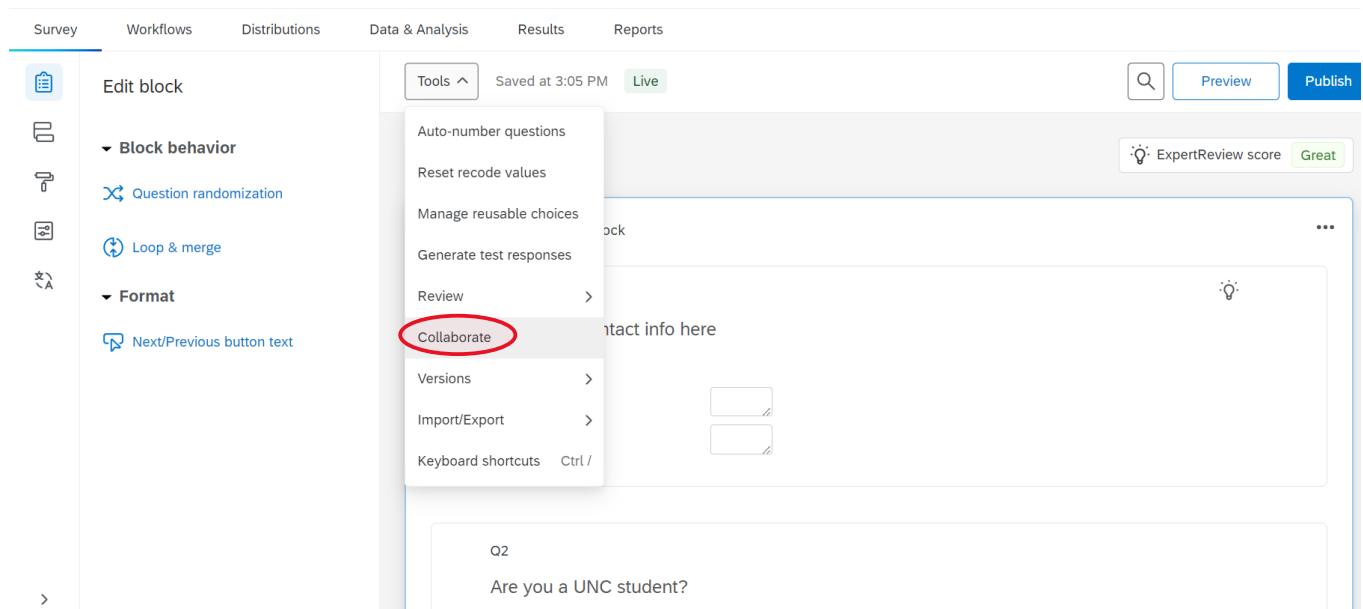
All project types All statuses Search...

Project name ↓	Status	Responses	Type	Owner	Last modified	Creation date	
☆ Workflow Schedule Based on Question Respo...	Active	2	Survey	Me	Jun 1, 2023	Mar 29, 2023	⋮
☆ Word Count/ Anonymous w/ Id & Organiz...	Active	24	Survey	Me	Mar 22, 2023	Nov 15, 2022	⋮

- b. Navigate to the Survey Builder inside your project and click on "Tools".

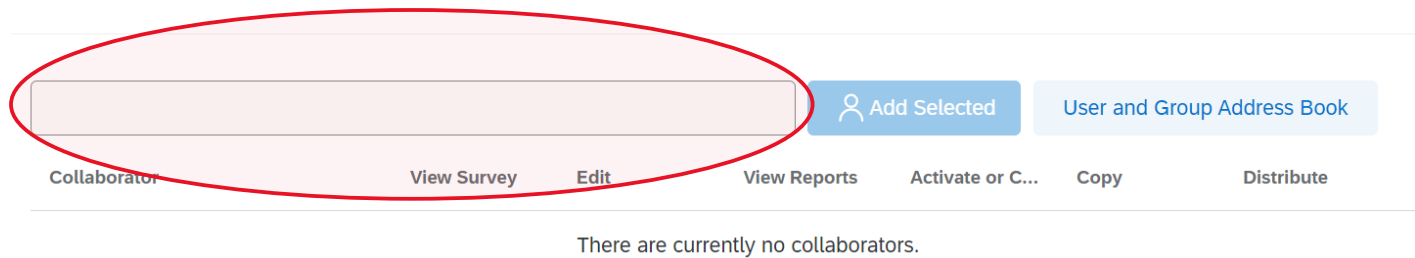


- 2) Choose "Collaborate". Note that if this option is greyed out, that means you are not the current owner of the survey. Only the survey owner can collaborate with others.



- 3) In the pop-up box, type part of the user's name or PID into the search box or click 'User and Group Address Book' and choose from a list. To collaborate with someone who does not have a UNC Qualtrics account, you can type in their email address here to send a collaboration request.

Collaborate on Project: Retake Test 1

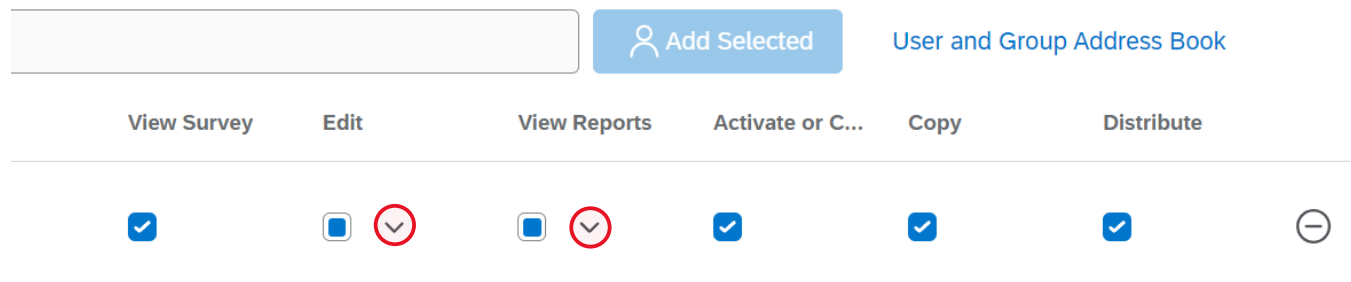


Collaborator [Add Selected](#) [User and Group Address Book](#)

[View Survey](#) [Edit](#) [View Reports](#) [Activate or C...](#) [Copy](#) [Distribute](#)

There are currently no collaborators.

- 4) When the person or group is identified and you click Add, Qualtrics will prompt you to write an optional message to accompany the notification being sent to your collaborator, alerting them that a survey has been shared with them. Once you click "OK", your collaborator's name will appear 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 dropdown arrow next to Edit or View Reports, you can specify even more precisely which types of actions the collaborator should be allowed to do.



[Add Selected](#) [User and Group Address Book](#)

[View Survey](#) [Edit](#) [View Reports](#) [Activate or C...](#) [Copy](#) [Distribute](#)

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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. If/when you no longer want to share the survey with this person, simply click "collaborate" again, and then click the "-" next to their name to remove access.

Do You Need a Qualtrics Group?

Groups allow two or more users to share copies of surveys, graphics, files, and messages in shared libraries. Users within groups can also share contact lists in their Directories page. Groups can include everyone in your organization, everyone in a specific division, or only specific users that you manually select. A Qualtrics administrator can set up a Qualtrics Group for you.

Once your group is created, a [group library](#) will automatically be created and viewable by all of its members. To share items in the Group Library, the owner of the message, image,

contact list, etc. can move items into the Group Library to make it accessible to others. Follow this link for documentation explaining in more detail how to use Libraries: [Library Basic Overview \(qualtrics.com\)](#).

Your [Projects](#) page contains all your active surveys and is where you create and edit surveys in preparation for data collection. Whereas, your [Library](#) is where you can save copies of surveys to [reference](#) later or use in future surveys; **the library is used for templates of surveys, not where you create and collect data for surveys.**

If you believe you need a Group, make sure all members 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>.

Then submit a ticket to ITS [HERE](#), or contact the appropriate UNC Qualtrics administrator from the list below. Include a short name you would like assigned to your Group along with the full names and email or PID (not Onyens) of the persons who should be included. The Group name should begin with a prefix referencing the Department. For example, Sociology would be SOCI_GroupName, and Frank Porter Graham would be FPG_AnotherGroup.

Your Affiliation	Qualtrics Administrator	Contact Info
Grad School	Rachel Underhill	Runderhill@unc.edu
Psychology	Hugh Meriwether	Hmeriwet@email.unc.edu
Public Health (SPH)	Andrew Ochs	Andrew_ochs@unc.edu
Medicine	Lakhesh Khullar, Peter Starback	lakhesh_khullar@med.unc.edu peter_starback@med.unc.edu
School Of Government (SOG)	Claire Paulson	paulson@sog.unc.edu
Social Work	James Griffith, Phil Kaufman	Griffitz@email.unc.edu philk@unc.edu
All Others	Michelle Temple	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 the survey owner transfers ownership of the survey(s) to an appropriate colleague at UNC prior to their departure from the University.**

To do so, the survey owner should email the Qualtrics Brand Administrator with the survey name and the name of the new owner of the survey. This new owner should also give permission to accept ownership of this new survey.

Ownership requests can be made by submitting a ticket at ITS [HERE](#).

Any files shared to a Group Library will remain in that Library because the content is not tied to an individual user.