

## Qualtrics Frequently Asked Questions

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### Access

- **How do you access Qualtrics at The University of Manchester?**  
To access, visit [www.qualtrics.manchester.ac.uk](http://www.qualtrics.manchester.ac.uk). Log in with your University username and password and 2-factor authenticate with Duo.
- **Can surveys be accessed in other countries, eg China?**  
Yes, surveys can be accessed in other countries, including China.

### Data & GDPR

- **Is data located in the UK or outside of UK?**  
Data are stored in EU. UKGDPR is now in force “These UK transfer rules broadly mirror the EU GDPR rules, but the UK has the independence to keep the framework under review.” Quote from [International transfers after the UK exit from the EU Implementation Period | ICO](#) Qualtrics works with several state bodies including the Department of Justice and NHS in the UK. These organisations have data stored in Qualtrics EU data centres.
- **Are there any GDPR issues with uploading contact lists to Qualtrics?**

There should not be issues with the uploading of contact lists from GDPR perspective (insofar as Qualtrics stores and processes such data). UoM Information Governance Office has carried a full review of Qualtrics. Please see more information on GDPR policies here: [Qualtrics – GDPR](#)

- **Is it possible to specify what fields are 'restricted data'?**

These are standard fields in Qualtrics – please see more information here: [Sharing permissions](#)

- **Is it possible to restrict surveys to people with UoM IT accounts only?**

Yes, it is possible to restrict survey takers to those just within Manchester. You can do this using [Single Sign On \(SSO\) Authenticator](#).

- **Can Qualtrics import your contacts information into the survey so that you don't have to take up space asking them to type it in manually, for example name, email address, faculty/directorate etc (assuming you're permitted to use that data).**

Qualtrics can import student information into the survey as [embedded data](#). This can either sit in the background (not shown to the students) or it can be [piped into](#) the survey (e.g. pre-piped into an open text box for a student to verify or change).

There should not be any issue with storing personally identifiable (PII) data in Qualtrics (there are certain considerations that staff should have as data controller e.g. purpose of data collection, who they'll be sharing data with, but as a data processor. Qualtrics is GDPR compliant and typically stores such data for universities).

## Functionality

- **Do UOM users have access to the file uploading feature?**

This is currently an additional feature (Advanced Question Suite). This is not currently included in UoM's licence, but could be added at a later date if there is significant interest. Requests for additional features should go through your cost centres and escalated through demand cards. For more information on demand management at the University, see the [IT Services webpage](#).

- **Can you upload a contact from Dynamics?**

This integration can be performed through API (a feature included in the university-wide license). Qualtrics has an out-of-the-box integration also with Dynamics that will enable such functionality also – the Dynamics integration is an additional feature.

- **I can see two tabs at the top of the screen: CoreXM and EmployeeXM. Is that normal?**

Yes. CoreXM is the product used by the University. It covers the solution that is used for academic research. Additional modules or capabilities, such as EmployeeXM, can be requested if your area needs it. You can progress this through your cost centres and escalated through demand cards. The current configuration was bought using research requirements. Student and admin requirements need consolidation.

- **Is there a best methodology for capturing time based questions without triggering the iQ warnings on having lots of text entry fields?**

Please see the [Timing Questions](#) webpage. ExpertReview warnings are intended as recommendations but in some cases these will not be relevant depending on purpose of your survey so they can be ignored.

- **Can Qualtrics be used when you have a stratified sample? For example, if you want the survey to stop accepting responses from, for example, women when the quota is met, but have the link still active until the quota for men is met.**

Yes. This is possible with Qualtrics. Please see more information here about advanced quota management: [Quotas](#)

- **Is there flexibility in quotas to ensure that the full gender spectrum is represented beyond the limited male/female options?**

Yes. The survey-creator can add more question options than just the binary male/female options and you can also set up [quotas](#) to cover these options also. These quotas can be set up based on assumptions on representation in population, or set up in a way that certain categories will be weighted or over-sampled.

- **If you set participant number limits for a survey, would participants just be told they can no longer submit or would it still allow them to complete the full survey and just not include it on the back end?**

This is an option for the survey creator. The default option in setting up quotas is that you screen out respondents as soon as they don't qualify within quota parameters, but you could set up the survey that all data is collected and certain segments are only excluded at analysis stage (sometimes upfront quotas are preferred to avoid selection bias).

- **If quotas are set up in a survey, does Qualtrics give the survey participant a detailed reason as to why they are being can't take the survey?**

The message given to individuals excluded due to quota parameters can be customised. That is, the survey creator can choose the wording of the message.

- **Is the CustomerXM module available at the University?**

CustomerXM is not part of the University's version of Qualtrics. CustomerXM and ProductXM are custom solutions which provide templates for customer and product surveys.

- **What CRM at UoM are linked to Qualtrics?**

UOM has access to API to build out integrations with CRMs, but Qualtrics can also offer out of the box (pre-built) integrations with Salesforce and Microsoft Dynamics and SAP systems.

- **How easy is it to import survey data from other systems?**

Qualtrics can import raw data (survey output) in the form of XML or CSV.

If you want to import the body / template of a survey, Qualtrics can import from Word but

because each survey platform uses its own syntax, it is often easier to re-create the survey using copy and paste (functions such as 'Edit Multiple' choices can make this processes more efficient as you can copy and paste lists of options directly into questions).

- **Can we use APIs to have live connections with Power BI dashboards?**

The API can be used to build a live connection with Power BI. This is a very common use-case. See here for more information: [How to use the Qualtrics API in conjunction with Power BI](#)

- **I only have contacts on my account, but no Directories?**

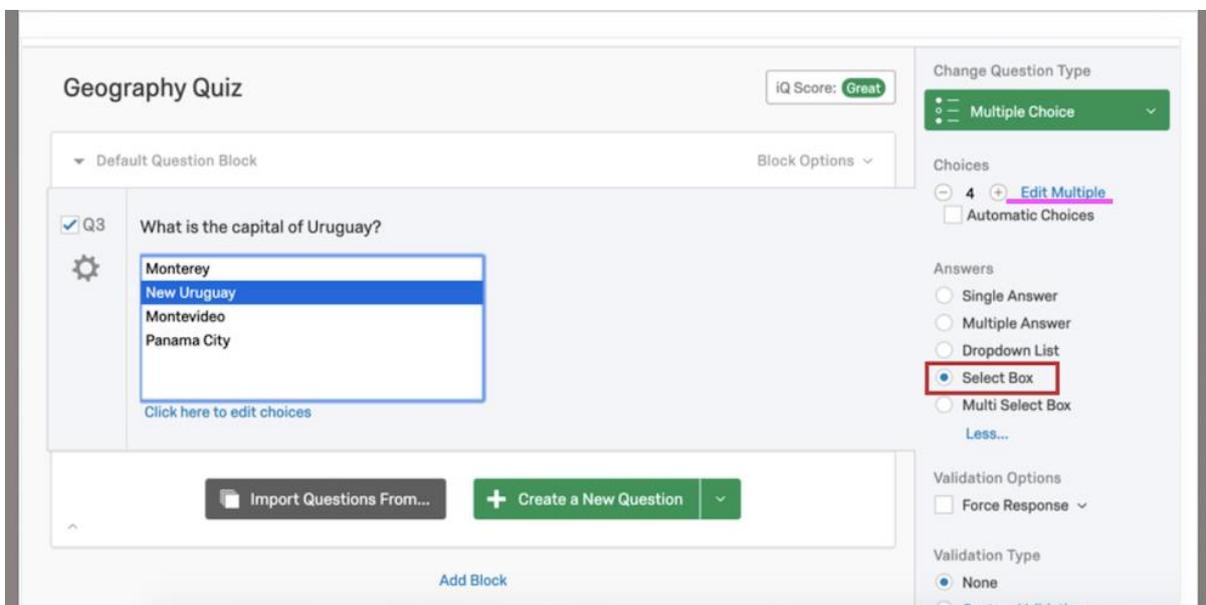
UOM has access to XMDirectory. Unfortunately this is not available for a few weeks while Qualtrics migrates data from the Business School license to the centralised University license, but as soon as this is complete, all functionality within XMDirectory will re-enabled.

- **Where can I find out more information about Ticketing (assign ownership of a task to an individual or role)?**

You can find out more about using the Ticketing feature here: [Tickets Task](#)

- **How do you embed a list of answer options from a spreadsheet into a drop down list?**

There are a few options for drop down list. One option is a multiple choice question. This gives an option to 'edit multiple' choices. Qualtrics recommends copy and pasting the list of choices from a spreadsheet as this is the fastest.

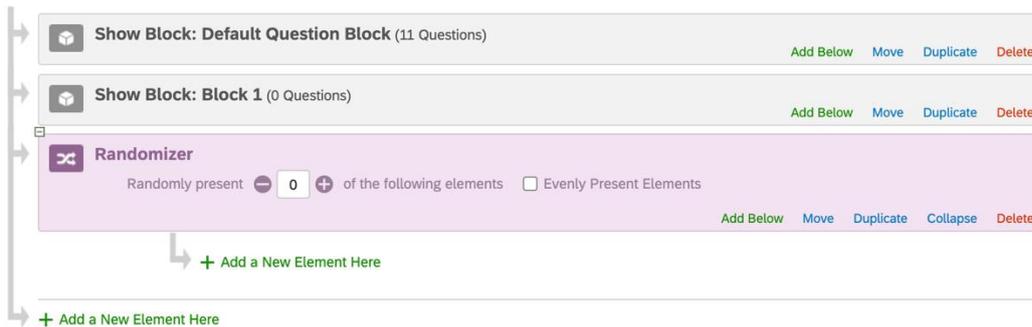


If it is a long list where you may want to use a 'drill down' to assist users in navigating to the choice as easily as possible (see [here](#)). It is also possible to upload a spreadsheet. There is a specific format needed for this so I recommend downloading the template Qualtrics suggests in the left hand side panel.

- **Can you set up surveys so participants see a random number of stimuli from a larger pool of stimuli?**

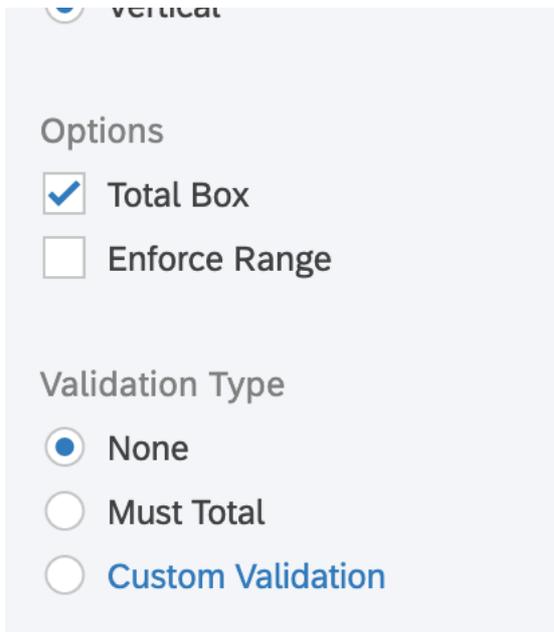
One method is to set up stimuli in survey blocks. In Survey Flow, you can select to randomly present a subset of blocks.

Survey Flow Mobile - health - Manchester



- **Using the 'Constant Sum' function, can participants give answers that adds to less than the total (e.g. 100%) if maybe they aren't sure? Or does the question force their answers to sum to the total?**

It is possible to simply not have any validation on this question type so that they can choose a random number.



- **Can you set up your survey so that consent forms and any personally identifying data is automatically separated out and stored as separate files?**

This would be possible. This video shows you how this could be set up: <https://youtu.be/UZkTu16-6oU>

- **Will the Qualtrics data integrate with R?**  
Qualtrics has just developed this feature and will be rolling it out in the coming months.
- **Can you create a survey for use in clinical trials which mirrors the layout of your source data? For example, lab reports, x-rays, pharmacy dispensing records etc.**  
The Qualtrics team recommend sending a sample/ template file that you wish to mirror. You can find information on how to get in touch with Qualtrics on UOM's Support Portal [Knowledge Base Article](#).
- **Are you able to only have some questions appear based on participant answers? For example if they select 'no' on a question, a different set of questions is shown vs. if they select 'yes'?**  
Yes. This is possible via display logic. See [here](#).
- **Is it possible to activate some interventions during the survey? For example, if respondents answer too quickly, then a message comes up to discourage it.**  
It is possible to create standard Descriptive Text 'question type' (just a short text snippet rather than a question). Using Display Logic you can have this appear as a 'warning' (eg if a stimulus was displayed in one condition, you can have a warning to remain on page for 3 seconds etc.). There isn't an easy way to set up logic or warnings based on timing (in this case, someone moving through the survey too quickly).
- **Where can I find more information about branching? (eg taking participants to different sections of the survey)**  
More information on this can be found here: [Branching / Logic](#)
- **How do I create questions which allow fixed units for the response? (eg for medication doses)**  
This is possible. Please see [here](#) and also see FAQ's at bottom of the page.
- **Are there any capacity issues and limitations on the following:**
  1. **How many surveys a person can or should create?**  
No (unless imposed by internal admin)
  2. **How many people a survey can be sent to?**  
No (unless imposed by internal admin)
  3. **How many questions a survey can contain?**  
No (unless imposed by internal admin)
  4. **Can a survey be sent to both internal and external people?**  
Yes

- **Can surveys be deployed anonymously via a unique URL link?**  
It is possible to have an anonymous / open link and to have personalized links if you are tracking respondents.
- **Are surveys mobile responsive?**  
Yes
- **Can results be exported as Excel data?**  
Yes. They can also be exported to SPSS.
- **Do Qualtrics have a service to help with data collection and source respondents on behalf of us? (eg for research)**  
Yes. This is a pay per response model but it will depend on length of survey, type of participant (ie frequency in population) and number of participants. Contact Qualtrics to find out more (please see the [Knowledge Base Article](#) for further info)
- **Is it possible to group surveys so that all those carried out by a certain team can be accessed by others?**  
It is possible to create groups with shared surveys, files, images etc.

## Accessibility

- **What is the accessibility of the site, is it compatible with screen readers? Are a range of views available?**  
Qualtrics is WCAG 2.0 AA compliant. Please see more information here: [Check Survey Accessibility](#)

## Further Training

- **Is there a training guide and/or online support?**  
There is 24/7 phone, email and chat support available. Please see our Support Site and Basecamp (Video Training Centre) here: [Qualtrics Support](#).  
  
Also see how to get in touch with Qualtrics on UOM's Support Portal [Knowledge Base Article](#).
- **Is there a training guide for someone who hasn't designed surveys before but needs to do so now? i.e. no prior knowledge needed**  
Qualtrics have a support page here and guides on using the platform: [Qualtrics Support](#) and [Getting Started – Survey Platform Overview](#)

## Licensing

- **Do I need to request a license for this? Where do I access it?**

You do not need to request a licence. Qualtrics is available to all at The University of Manchester. It can be accessed using an up-to-date web browser. Visit [www.qualtrics.manchester.ac.uk](http://www.qualtrics.manchester.ac.uk) and log in using your University username and password and 2-factor authentication from Duo.

- **I still use some surveys I created using a licence bought externally through one of our doctoral training partnerships. Can I access them through my Manchester Qualtrics account?**  
If this is a Qualtrics license, we can assist with migrating your account over to UOM (please contact our Support Team). You may also export all surveys and data and re-import in Qualtrics. Collaborating surveys is also an efficient way of moving surveys across.

## Languages

- **Can you put surveys into other languages?**  
Yes. This is possible with the translation feature.
- **Is translation by Qualtrics free or will it be charged?**  
The translate feature which pulls from Google Translate by default is free but if you use Qualtrics translation services this would be a paid service. Typically this is pay per word. For a quote, please reach out to our UOM Account Manager Therese Morley at [theresem@qualtrics.com](mailto:theresem@qualtrics.com). Therese will put you in touch with a Research Services Manager at Qualtrics and they can scope your requirements and share a quote.
- **Is there a list of languages that Qualtrics can support translation into?**  
Yes. Please see [here](#).
- **Can you do a thematic analysis even if the answers are in other language?**  
If you are a native/ fluent speaker and all text data is in your native language (other than English), it is possible to create themes using the search bar function and tagging themes. Please read more information [here](#) about translating comments for example, back into English for analysis.

## Sharing options

- **I want to share my survey on a closed Facebook group. Due to ethics requirements I may need to ask the group moderator to share the survey link for me. Should I create a web link to the survey rather than administer it via the “social media” tab?**  
The best option would be to share a web link if the moderator page is not your own Facebook page. By selecting the Social Media options within Qualtrics it automatically links to your own Facebook page.
- **For the sake of reproducibility is there a way to share your Qualtrics surveys, or the code forming them, with other researchers, or post it on a repository such as GitHub?**

Due to Qualtrics not wanting to share its proprietary code (for its own functionality) we don't have the type of code that you can share on a repository like GitHub. It is possible to download Qualtrics surveys in 'Qualtrics Survey File' format but this can only be opened in Qualtrics accounts. It is possible to export surveys to TXT and Word format.

- **Is it possible to share access / collaborate with partners outside the University?**

This is possible by inputting the email address of an outside contact when sharing. This will generate an email that is sent to their inbox. By selecting the link in the email they will be directed to their own Qualtrics account where they will find the shared survey.

- **If you need to share data with other colleagues - do you do that via the tool or do you need to export and email around the University?**

If just sharing data (not editing access etc.) there are a number of ways to do that. Qualtrics reports can be shared via live link so anyone with the link can access. There is also an email function so you can schedule a report to be sent (eg send on 1st Monday of the month to a colleague). Export options are available too.

## Looks and design

- **Can you change font size for questions?**

This is possible across the entire survey (in 'Look and Feel') or using the Rich Content Editor for each individual question.

- **Is it possible to add different logos to the University template for surveys to acknowledge other stakeholders?**

This is possible by uploading their logo in 'Look and Feel' section.

- **Will we be able to design and share templates?**

Manchester receives a default template that is branded to the University. This will soon be available in everyone's account. It is possible to customise your own templates also (ie bring in own logos, fonts and background etc.). By creating a survey and sharing with a designated group or individual, it is possible to share a custom template.

## More information about Qualtrics

The launch of QualtricsXM at The University of Manchester came from the University's [Research Lifecycle Programme's](#) (RLP) Survey Tools project.

You can find further information on the Research Lifecycle Programme here:

- [About the RLP](#)
- [About the Survey Tools project](#)
- [Get involved in RLP events / engagements](#)
- [Sign up to the RLP newsletter](#)

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