Qualtrics Faculty/Staff Sponsor Information

1. If you are going to be a Faculty Sponsor for a student account and you do not already have a Qualtrics account, you should first complete the Faculty/Staff Account Request form to have your own account created.

2. Once you have your own Faculty/Staff Qualtrics account you can now proceed and complete the Student Account Creation Request form. The form allows for creating individual accounts or for creating accounts for a group or class of students. To create accounts for students, you will need each student’s name and campus email address.

3. Faculty Sponsors and students both receive an email once the account is created. The account created for the student will be a basic account limited to survey creation and other limited functionality. Students will not be able to publish or distribute any survey using their basic account.

4. If the faculty/staff sponsor wants to allow students to publish and distribute surveys, the Office of Institutional Effectiveness recommends that the faculty sponsor create a blank survey by simply creating a new project and naming it and then utilize the collaborate feature in Qualtrics to grant the student appropriate access to that specific survey.

5. By using the collaborate feature, you as a faculty sponsor will be able to provide students with access to ‘upgraded’ features such as survey activation and distribution. It is important you fully understand the access options before granting them to another person.

![Collaborate Feature](image)

General Permission Descriptions

- **Edit**: Ability to add, remove, or change questions on a survey
- **View Reports**: Ability to view results summaries and access or download the data
- **Activate/Deactivate**: Ability to make a survey "live" (open to receive responses from users) or "closed"
- **Copy**: Allows collaborator to create a copy of the survey in their own account (the copy is not connected to the original in any way)
- **Distribute**: Ability to use the email distribution feature within Qualtrics to send the survey to respondents

For more detailed descriptions of the various permission options please visit this link.

Granting Advanced Student Access via Collaborate in Qualtrics

The collaborate feature allows you to give and control other Qualtrics users access to advanced features such as survey activation and reports. Use the steps below to collaborate with a student and grant advanced access.

Note: The student’s accounts needs to have been created prior to these steps. If you have not yet requested an account for the student please submit the brief Student Account Request Form.

1. Login in to your Faculty/Staff Qualtrics account.
2. Click on the green 'Create Project' located towards the upper right hand corner.

3. Select ‘Blank Survey Project’

4. Enter a project name and click on Create Project.

5. Once the main survey page opens, click on ‘Collaborate’

6. Enter the email address for the student and click on the ‘Add’ button.
7. Once you add the student’s campus email you will be prompted to enter an optional message that will be sent with the survey link to the student. Click on the ‘OK’ button when you are ready to proceed to the next step.

![Invite campusemail@potsdam.edu to collaborate]

8. Select the checkboxes for the permissions you want to grant the student or person you’ve added. Then click on ‘Save’ and the invitation to collaborate for that survey will be sent. Be careful that you only select the permissions that are needed. More details on Collaboration Permissions are available here.

![Collaborate on Project: Example Survey - Student Name]

You have now successfully collaborated on that specific project with the student. They will be able to work on it based on the permissions you granted in the step above. You may go back to the collaborate screen at any time to edit or remove their access to the project.