Qualtrics Migration Guidelines

If you need to migrate content from a department/college Qualtrics account to the campus-wide Illinois Qualtrics, these guidelines will help you determine which migration option is best for you, what steps to take, and things to be aware of to help you avoid losing data.

*Note: Throughout this guide, we refer to unit/college Qualtrics accounts as “old” accounts and UIUC campus-wide accounts as “new” accounts.*

# Migration Options - Overview

## WARNING!

**Regardless** of the option you choose, the following content **will not migrate**.

* Surveys owned by others.
  + When your account is migrated, only surveys owned by you will migrate.
  + Any surveys that were [shared](https://www.qualtrics.com/support/survey-platform/my-projects/sharing-a-project/) with you must be re-shared after the migration.
  + Similarly, if you have shared surveys with others, you must re-share them after the migration.
* Any [API integrations](https://www.qualtrics.com/support/integrations/api-integration/overview/) you've set up.
  + You will have to modify the integration to use the API key from your new account.
* Any [text topics](https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/topics-in-text-iq/) from Text iQ.
  + If you'd like to keep your text topics, you will need to [export](https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/topics-in-text-iq/) your topics from your old account and [import](https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/topics-in-text-iq/) them into your new account.
* Any survey [reports](https://www.qualtrics.com/support/survey-platform/reports-module/results-vs-reports/).
  + These must be manually recreated in your new account.
* Any [workflows](https://www.qualtrics.com/support/survey-platform/actions-module/setting-up-actions).
  + These must be manually recreated in your new account.
  + This includes but is not limited to workflows that email respondents a copy of their responses or that populate a spreadsheet.
* Any [contact lists](https://www.qualtrics.com/support/survey-platform/contacts/managing-multiple-lists/). (AKA directories, mailing lists)
  + Contact lists can be exported before your account is migrated, and then uploaded to the new account after migration.

There are three options to migrate content between Qualtrics accounts:

1. **Self-migration**. You can manually download your surveys, library contents, and data, and then upload them into your new account.
   1. This works well if you have a small number of surveys, and zero or few important files in your personal [Qualtrics library](https://www.qualtrics.com/support/survey-platform/account-library/library-overview/#PersonalAndGroupLibraries).
   2. You can [contact us](https://go.illinois.edu/SurveyQuestion/) if you have questions.
2. **CITL-Data Analytics Group migration**. In many cases, the CITL Data Analytics Group can migrate your data for you.
   1. The process can be completed in around a week. When it’s finished, please double-check the results.
   2. This process will migrate your surveys and libraries. If you have workflows or survey reports, you will need to recreate them in your new account. If you have contact lists, you will need to download them yourself and upload them into your new account.
3. **Qualtrics Support Migration** (also called a “user move”). You can apply with the CITL-Data Analytics Group for Qualtrics Support to migrate your account.
   1. This is recommended for accounts that have many surveys and/or large Qualtrics libraries.
   2. The process takes around a month.
   3. Your old account will be deleted when the contents are migrated.
   4. You should finish or manually migrate any ongoing projects before requesting a Qualtrics Support Migration.
   5. Some data cannot be transferred. Specifically, if you have workflows, survey reports, and/or contact lists, you will need to migrate them yourself *before* Qualtrics Support migrates your account.

## Things to consider:

* How many surveys are in your Qualtrics account?
  + If you have less than 10 surveys, we recommend **self-migration** *unless* one of the situations below applies to you.
* Do you have complex [workflows](https://www.qualtrics.com/support/survey-platform/actions-module/setting-up-actions) , survey [reports](https://www.qualtrics.com/support/survey-platform/reports-module/results-vs-reports/), or extensive [contact lists](https://www.qualtrics.com/support/iq-directory/lists-tab/mailing-list-options/#ExportListContacts) in your existing account?
  + If so, we suggest **CITL-Data Analytics Group** migration or **self-migration** to migrate the content, so that you can manually recreate the workflows/contact lists in your new account.
  + If Qualtrics Support migrates your account, the old account will be deleted, so you would need to document your workflows/contact lists ***in advance*** to recreate them.
* How many [library files](https://www.qualtrics.com/support/survey-platform/account-library/library-overview/#PersonalAndGroupLibraries) do you have, and do you need them to migrate?
  + If you have zero or few files, or do not need the files in your new account, self-migration is a safe option.
  + If you have more files, CITL-Data Analytics Group can migrate all types of library files.
  + If you have a very large number of files, especially files that are not graphics or messages, it’s easiest if Qualtrics Support migrates your account.
* Are you actively collecting data right now?
  + If you are, and data collection will finish before the end of December 2023, [contact us](https://go.illinois.edu/SurveyQuestion/)  and ask to keep your account active until data collection is finished.
  + If you are, and data collection will not finish in 2023, you *must* find a time to interrupt data collection and migrate the survey.
  + You may wish to separate your migration into parts: One part for the active survey, and one part for your other surveys.
    - For the active survey, follow the process outlined below.
    - For the other surveys, you can migrate them via **self-migration** or **CITL-Data Analytics Group migration** now, or depending on your timeline, you may be able to wait until the active survey is finished and then move all your surveys at once.
  + Please feel free to [contact us](https://go.illinois.edu/SurveyQuestion/) for assistance.

# Self-Migration

CITL has [documentation](https://citl.illinois.edu/citl-101/data-analytics/surveys/qualtrics/instructions-for-qualtrics-account-transition) and links to videos that show this process ([here](https://mediaspace.illinois.edu/media/t/1_y1j69458) and [here](https://mediaspace.illinois.edu/media/t/1_xjcvuf92/208517463)).

## The process:

1. Activate your new account by logging in at [illinois.qualtrics.com](https://illinois.qualtrics.com) using your UIUC NetID and password.
2. Login to your old account.
3. Download your surveys as .qsf files.
4. Download your survey data as .csv files.
5. Upload your surveys into your new account by creating a “New Project” and choosing “Import .qsf file.”
6. Upload your survey data into the new projects.
7. Download the contents of your old user library.
8. Upload the library contents to your new account’s user library.
   1. Note: Even if images and messages in surveys seem to migrate with the survey, they are not added to your new library unless you specifically copy them over. Only images and messages in your new library can be added to future surveys.

## Warnings:

* Remember that all accounts through unit/college licenses will be disabled at the end of 2023, and you will not be able to access them after that point. Some colleges are deactivating accounts before then.
* Any surveys that were [shared](https://www.qualtrics.com/support/survey-platform/my-projects/sharing-a-project/) with you or that you shared with others must be re-shared after the migration.
* Any [API integrations](https://www.qualtrics.com/support/integrations/api-integration/overview/) you've set up will need to be reformatted.
* Any [text topics](https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/topics-in-text-iq/) from Text iQ will not transfer to your new account. If you'd like to keep your text topics, you will need to [export](https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/topics-in-text-iq/) your topics from your old account and [import](https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/topics-in-text-iq/) them into your new account.
* Survey [reports](https://www.qualtrics.com/support/survey-platform/reports-module/results-vs-reports/), [workflows](https://www.qualtrics.com/support/survey-platform/actions-module/setting-up-actions), and [contact lists](https://www.qualtrics.com/support/survey-platform/contacts/managing-multiple-lists/) ***do not transfer***. Contact lists can be exported; reports and workflows *must be manually recreated*.

# CITL-Data Analytics Group Migration

## The process:

1. Activate your new account by logging in at [illinois.qualtrics.com](https://illinois.qualtrics.com) using your UIUC NetID and password.
2. Login to your old account.
3. Make sure that none of your surveys are actively collecting data. If they are, see the considerations for active data collection above.
   1. You can either mark all surveys as “Closed,” or tell us in writing that none are actively collecting responses.
4. [Submit a ticket](https://go.illinois.edu/qualtrics_help) and specify that you’d like CITL-Data Analytics Group to migrate your surveys. Tell us about any special circumstances that may apply.
5. When we have finished the migration, your old account will still exist, so we ask that you please compare the two accounts to make sure everything looks good.
   1. In some rare cases (such as surveys with over 100 drop-down options or surveys in languages other than English), the survey responses may not migrate correctly. Despite our best efforts to catch these errors, please double-check things and/or download a copy of the data from your old account before it is deactivated.

## Warnings:

* Remember that all accounts through unit/college licenses will be disabled at the end of 2023, and you will not be able to access them after that point. Some colleges are deactivating accounts before then.
* Any surveys that were [shared](https://www.qualtrics.com/support/survey-platform/my-projects/sharing-a-project/) with you or that you shared with others must be re-shared after the migration.
* Any [API integrations](https://www.qualtrics.com/support/integrations/api-integration/overview/) you've set up will need to be reformatted.
* Any [text topics](https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/topics-in-text-iq/) from Text iQ will not transfer to your new account. If you'd like to keep your text topics, you will need to [export](https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/topics-in-text-iq/) your topics from your old account and [import](https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/topics-in-text-iq/) them into your new account.
* Survey [reports](https://www.qualtrics.com/support/survey-platform/reports-module/results-vs-reports/), [workflows](https://www.qualtrics.com/support/survey-platform/actions-module/setting-up-actions), and [contact lists](https://www.qualtrics.com/support/survey-platform/contacts/managing-multiple-lists/) do not transfer. Contact lists can be exported; reports and workflows must be manually recreated.

# Qualtrics Support Migration

## The process:

1. Activate your new account by logging in at [illinois.qualtrics.com](https://illinois.qualtrics.com) using your UIUC NetID and password.
2. Login to your old account.
3. Make sure that none of your surveys are actively collecting data. If they are, see the considerations for active data collection above.
   1. You can either mark all surveys as “[closed](https://www.qualtrics.com/support/survey-platform/my-projects/organizing-your-projects/),” or tell us in writing that none are actively collecting responses.
4. Decide which account [library](https://www.qualtrics.com/support/survey-platform/account-library/library-overview/) (including the graphics, messages, files, and surveys in your library) to keep.
   1. If you have no surveys in your new account, you will probably want the library from your old account.
   2. If you have surveys in both accounts, you will probably pick the library that contains more items (or more current items).
   3. If you need items from both libraries, you will have to download the items in the library you don’t want to keep, and then reupload them once the Qualtrics Support migration is complete.
   4. Visit [this support page](https://www.qualtrics.com/support/survey-platform/account-library/library-overview/) to learn more about what's included in your account library.
5. [Submit a ticket](https://go.illinois.edu/qualtrics_help) and specify that you’d like a Qualtrics Support migration. Tell us which library you’d like to keep, and tell us about any special circumstances that may apply.
6. We will notify you when we have submitted your request to Qualtrics Support.
7. If you have not heard any updates in over a month, please contact us and we will investigate things.
8. When the migration is finished, your old account will no longer exist, but to the best of our knowledge, any errors can be corrected within 30 days.
   1. In some rare cases, your account may not migrate correctly. Despite our best efforts to catch these errors, please double-check things as soon as migration is complete to be able to retrieve any lost data.

## Warnings:

* Remember that all accounts through unit/college licenses will be disabled at the end of 2023, and you will not be able to access them after that point. Some colleges are deactivating accounts before then.
* Any surveys that were [shared](https://www.qualtrics.com/support/survey-platform/my-projects/sharing-a-project/) with you or that you shared with others must be re-shared after the migration.
* Any [API integrations](https://www.qualtrics.com/support/integrations/api-integration/overview/) you've set up will need to be reformatted.
* Any [text topics](https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/topics-in-text-iq/) from Text iQ will not transfer to your new account. If you'd like to keep your text topics, you will need to [export](https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/topics-in-text-iq/) your topics from your old account and [import](https://www.qualtrics.com/support/survey-platform/data-and-analysis-module/text-iq/topics-in-text-iq/) them into your new account.
* Survey [reports](https://www.qualtrics.com/support/survey-platform/reports-module/results-vs-reports/), [workflows](https://www.qualtrics.com/support/survey-platform/actions-module/setting-up-actions), and [contact lists](https://www.qualtrics.com/support/survey-platform/contacts/managing-multiple-lists/) do not transfer. Contact lists can be exported; reports and workflows must be manually recreated.

# If you are actively collecting data:

## Points to remember:

* You will lose access to your old account at the end of 2023, so transfer anything you need before then.
* To prevent response data from getting lost, your survey must not be actively collecting responses while it is migrated. The easiest way to ensure that nobody will respond is to mark the survey as “Closed.”
* The survey URL will change in the migration, so you will have to redistribute the survey.
  + We highly recommend using a ShortURL (“go-link”) in [Webtools](https://webtools.illinois.edu/) that links to your survey URL.   
    (Students: your advisor can create a ShortURL for you)
  + However, you can follow the same process without a ShortURL by skipping Step 1 below and in Step 3, distributing the new URL instead of the ShortURL.
* Contact lists / distribution lists / mailing lists **cannot** be migrated. You should [export](https://www.qualtrics.com/support/survey-platform/contacts/managing-multiple-lists/) them before the migration.

## Moving an active survey:

1. Prepare.
   1. **Create a ShortURL** and link it to the existing survey.
   2. Change **distribution materials** (fliers, QR codes, emails, etc.) to publish the ShortURL.
   3. Identify the best time to interrupt data collection.
2. Set-up.
   1. Make a **copy of the survey** in your new Illinois Qualtrics account.
3. Migrate the survey.
   1. At the time you identified, **change the ShortURL** to reference the new survey.
4. Migrate the data.
   1. Once the new survey is live and you are sure nobody is filling out the old survey, **close the old survey**.
   2. Then, **download the data** from the old survey and upload it into the new survey to combine it with the new data.
5. Moving forward.
   1. Now that you have a ShortURL, you can change the survey URL as needed with no problems.
   2. This can be helpful to separate class sections over multiple semesters or for different waves of a longitudinal study.