Connecting to Qualtrics data

There are three different ways of connecting to Qualtrics survey results within Tableau Desktop:

- **Export data set from Qualtrics in .CSV format and connect to Tableau Desktop.**
  - **Pros:**
    - No programming required.
  - **Cons:**
    - No auto-update functionality after publishing to Tableau Server.
    - First row contains headers.

- **Use Qualtrics / Tableau web connector:**
  - **Instructions:**
    1. Login to qualtrics.umn.edu.
    2. From the upper right hand corner, select the avatar pull-down menu and go to Account Settings, then select the Qualtrics IDs tab.
    3. Under the User section, copy/paste your token. If you don't have a token, select Generate Token. This only needs to be done once. Copy and paste this somewhere convenient for upcoming steps. It will be a long item in the Token field, i.e., mcRNjaPKqIgIAKAt4vFcvyqgSCbKE8PSUvo0HQcx
    4. Return to Projects > your survey.
    5. Data Analysis > Import/Export > Export Data > Use Legacy Export Format > Tableau tab.
    6. Copy the URL for the Web Data Connector
    7. Open Tableau > Data > New Data Source > Web Data Connector > Paste the URL.
    8. After a short pause, it should ask for your login credentials. Under the green login button, select the small blue link, "Api Token Login."
    Paste your token from step 3 and press Enter.
  - **Pros:**
    - No programming required.
    - Opening the workbook in Tableau Desktop and refreshing the datasource will update the data.
  - **Cons:**
    - No auto-update functionality after publishing to Tableau Server.

- **Use Qualtrics API**
  - **Instructions:**
    - Login to Qualtrics > Account Settings > Qualtrics IDs tab
    - Note the Survey ID and your API token.
    - Use the AHC-IS script to pull your survey data into an Oracle table, or create your own script.
    - Connect your Tableau workbook to the Oracle table.
  - **Pros:**
    - You can script an hourly or nightly refresh of your Qualtrics data.
      - Scripting can also be done to automatically update Tableau Server on a scheduled basis.
      - The AHC-IS script is already set to pull data directly from Qualtrics and update your Oracle table each night starting at 10 pm.
    - Response values can be either numeric or text.
  - **Cons:**
    - Programming experience is required (or you can use the AHC-IS script already provided!).