SSOid Control Enablement User Guide for

QuestionPro

Contents

QuestionPro is a web-based survey service for all HKBU Faculty, Students and Staff to support teaching and research at HKBU. By default, survey in QuestionPro is open to anyone. The SSOid control enablement in the QuestionPro can limit the surveys to be accessed and responded by the HKBU faculty, students, staff, or alumni only. The following shows you how a survey owner can build a survey using the SSOid login protection with different user access domains.

A. Register respondent identification information to a survey
You must first register the respondent identification information by following the steps.
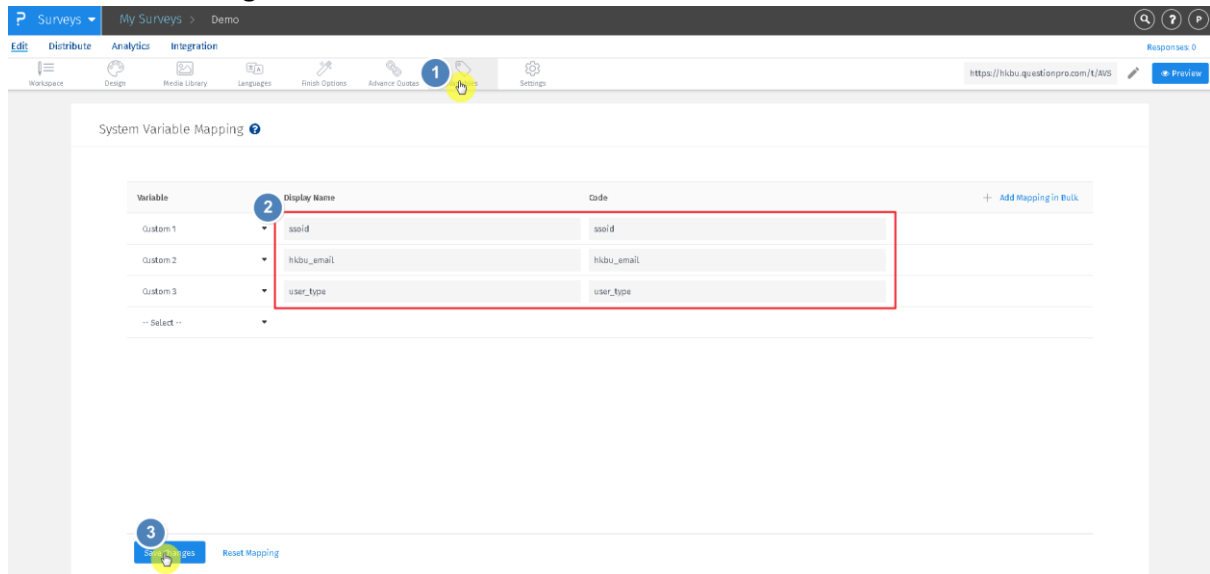
Add Survey Authentication

1. Open your survey.
2. Click **Settings** > **Security** > Select **Hong Kong Baptist University SAML** > Click **Save Changes**.
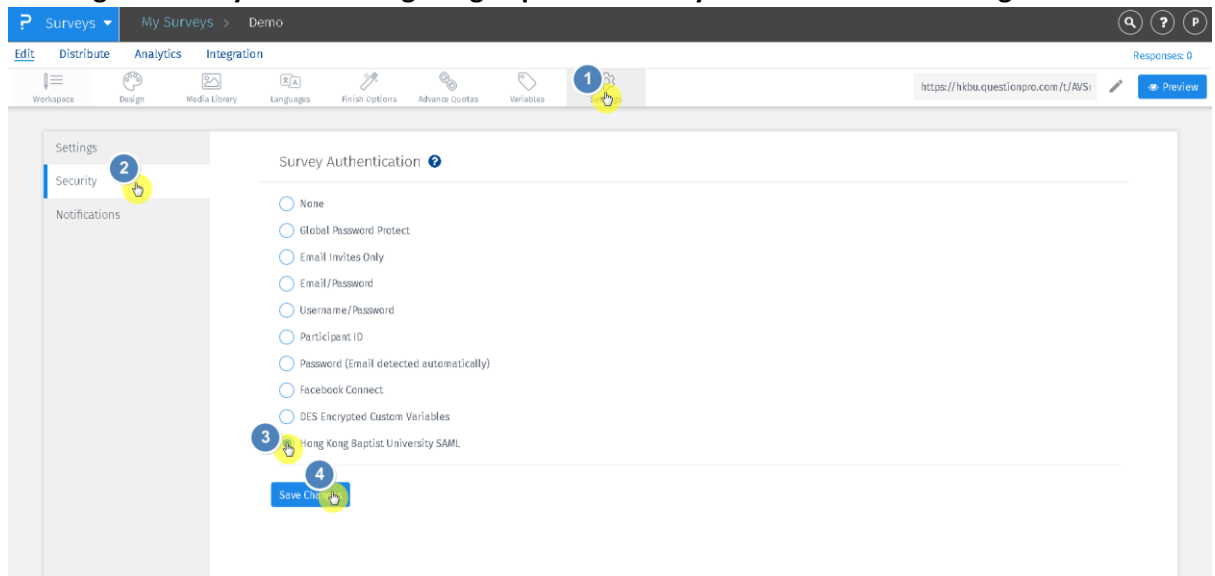
Configure variables

1. Click **Variables**.
2. Input the custom variables as shown below.
3. Click **Save Changes** button.

Variable	Display Name	Code
Custom 1	ssoid	ssoid
Custom 2	hkbu_email	hkbu_email
Custom 3	user_type	user_type

* Variables **Custom 1 – 5** are reserved by ITO.

Respondent Identification Information

After you have added the above variables in **QuestonPro**, when a HKBU user successfully logged in to the **QuestionPro**, three pieces of user information will be transferred from the SSO system to the **QuestionePro**.
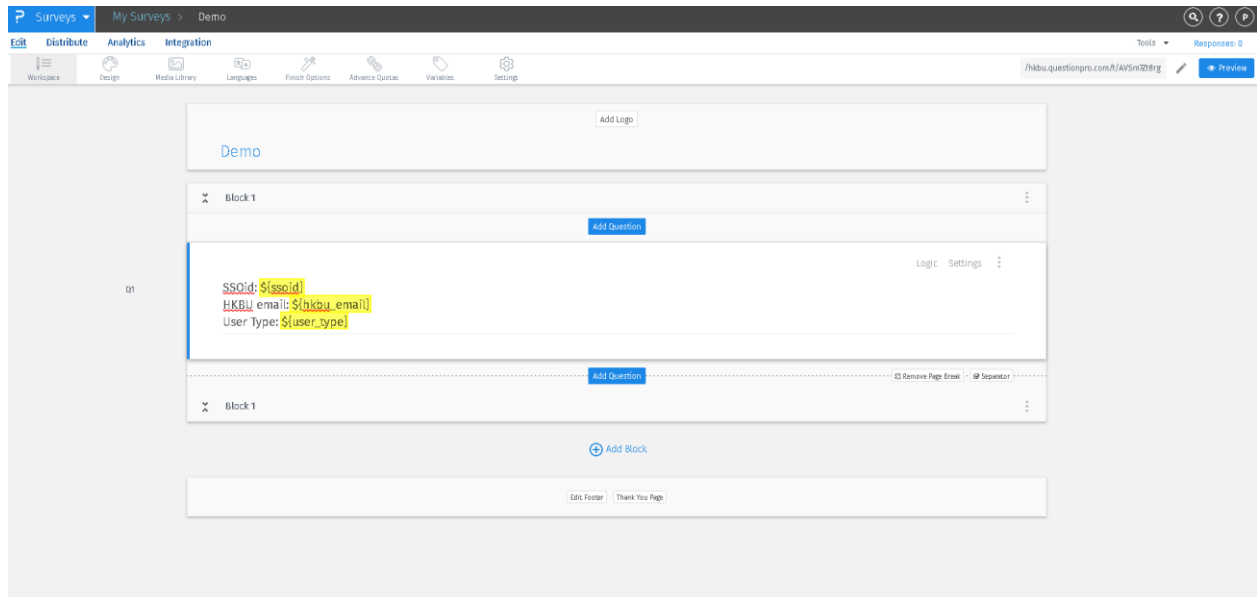
{**ssoid**}: the login user SSOid
{**hkbu_email**}: the email address of the user
{**user_type**}: the user type (student, staff, or alumni)

You can use the codes \${**ssoid**} / \${**hkbu_email**} / \${**user_type**} to display the respondent information or to set validation logic in the survey by adding the code \${**ssoid**} / \${**hkbu_email**} / \${**user_type**} to the survey / email invitation / Thank You page, etc.

Example: A survey shows the respondent identification information in the Question section.

## B. Protect a survey with different HKBU user domain

You can limit the access to a survey by either

- Staff, or
- Students, or
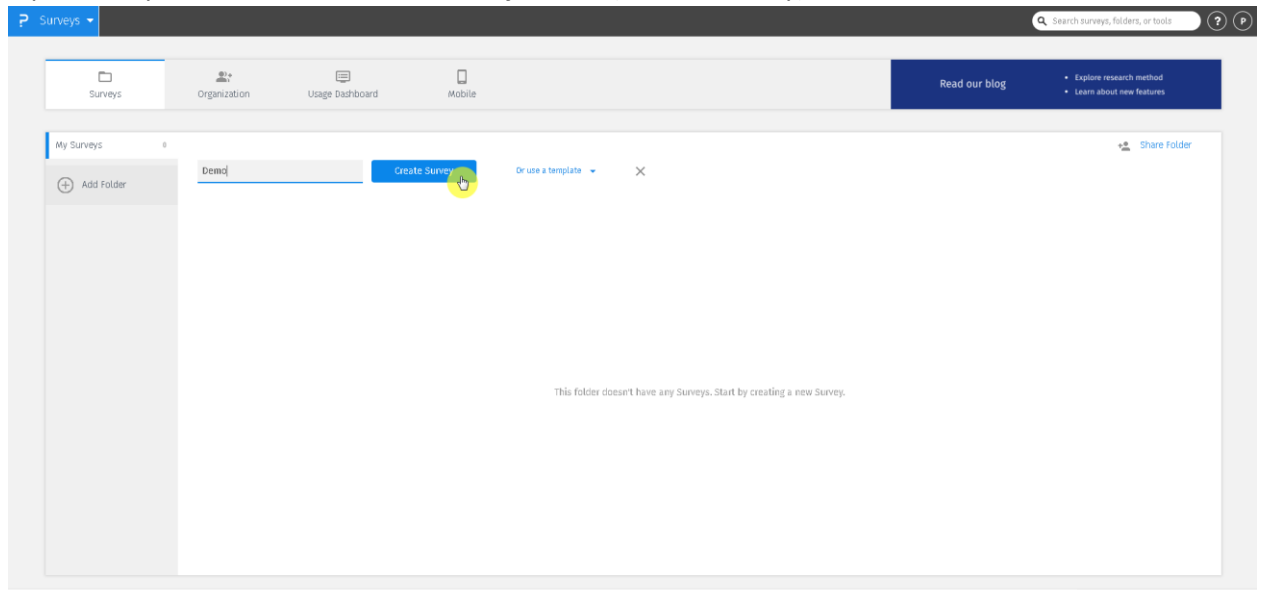- Staff and Students, or
- Alumni

B.1 Limit a survey to HKBU staff with SSOid only

Please make sure you have registered the respondent identification information by following **Section A** before proceeding the following steps.
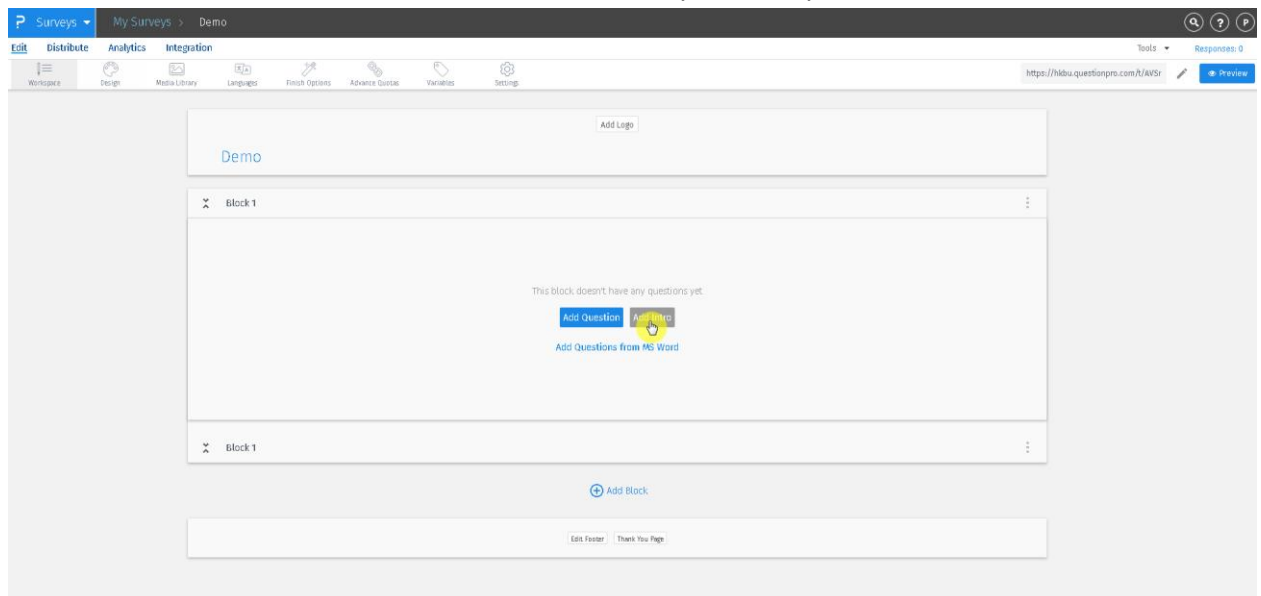
1. Click **+ New Survey** to create a survey or open your existing survey.
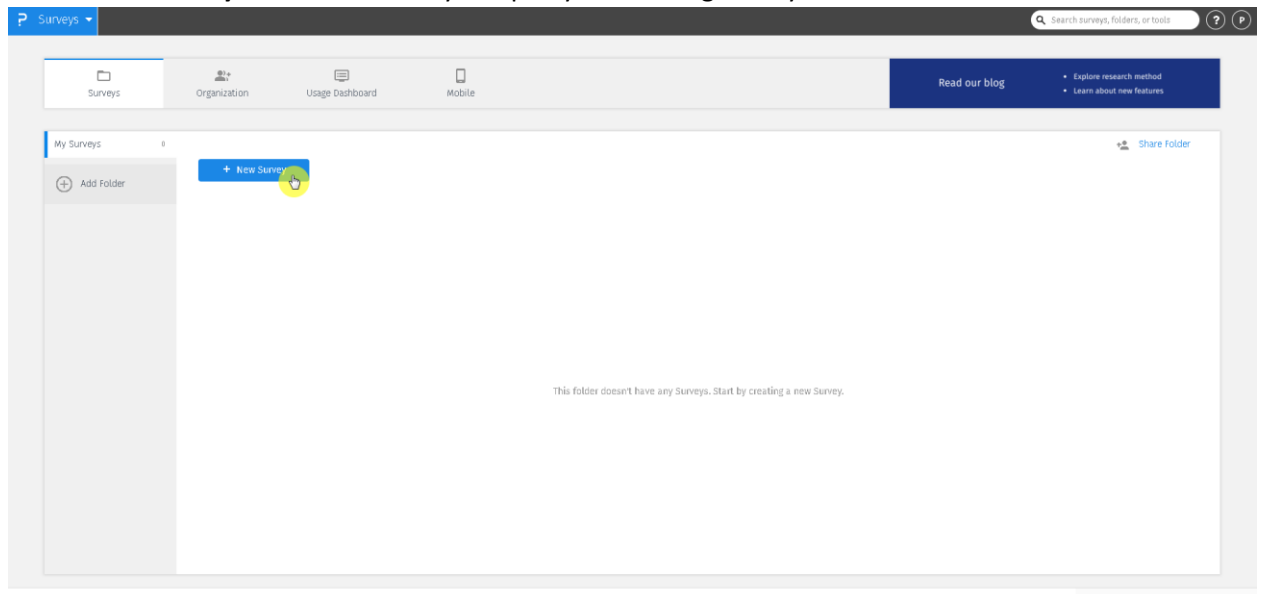
2. Input survey name and click **Create Survey** button (for new survey).

3. Click the **Add Intro** button to add an introduction about your survey.

4. Click **Add Question** button to add the first question of the survey. This is necessary for setting the authentication flow in step 8.
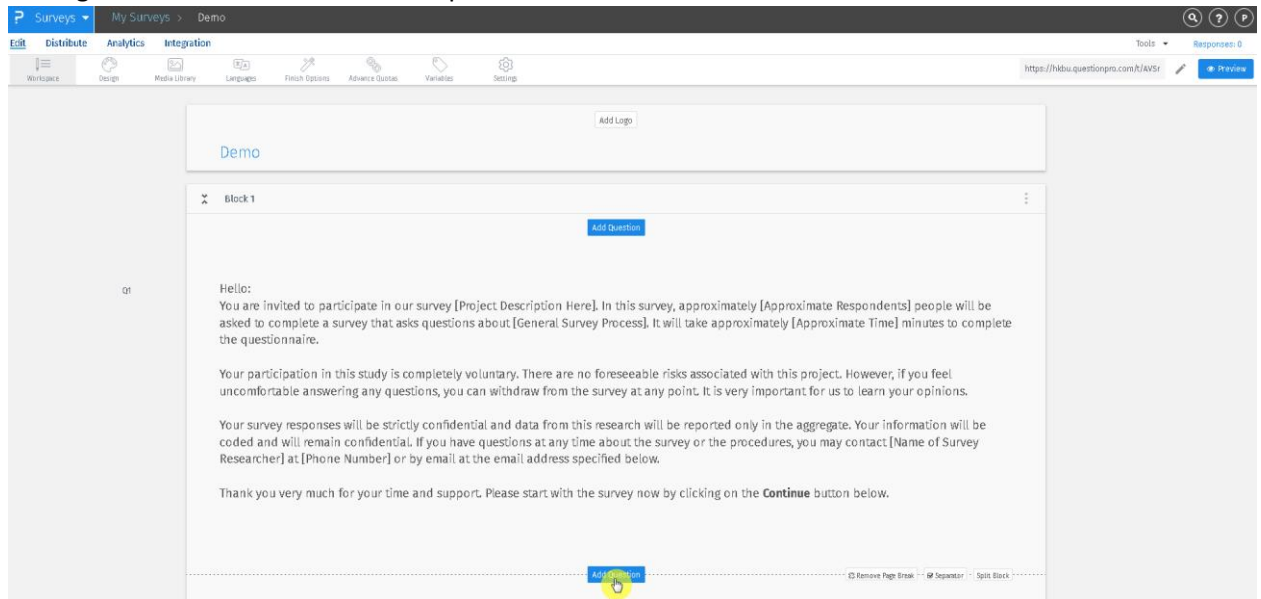
5. In the **introduction** section, click **Logic** to add a logic.
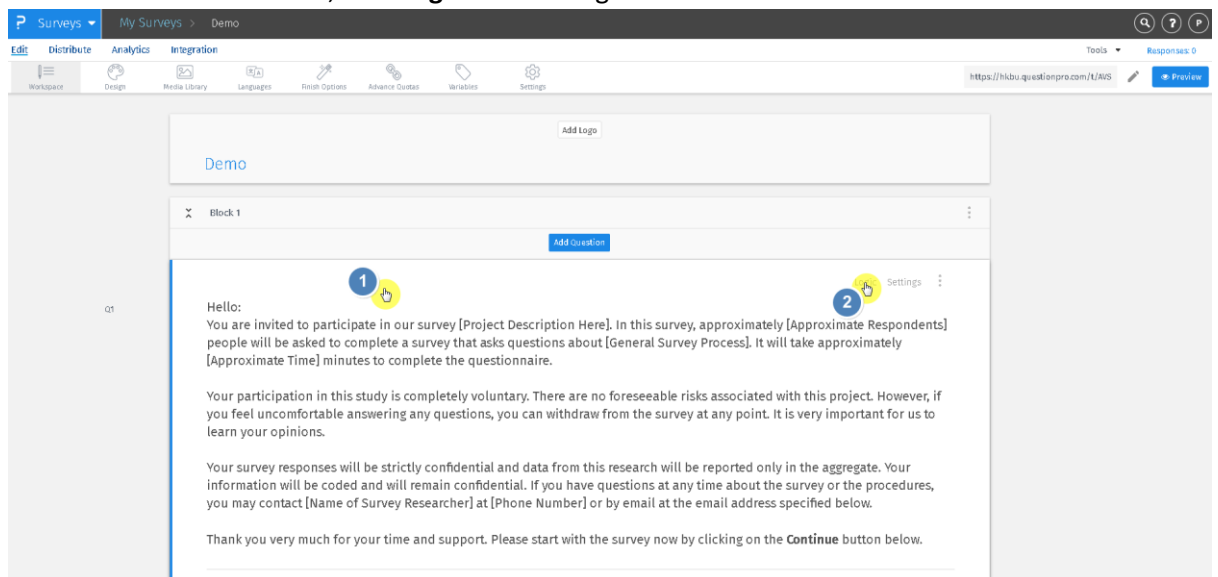
6. Choose **Compound Branching** from the dropdown list.

7. For the **New Criteria**, input **Criteria Name:** *Staff Only*.
Set the criteria: If [*System Variable*] [*user_type*] [*equals*] [*staff*].

8. In the section **If criteria is met, jump to**, select the first question you have just created in step 4.

9. In the section **Default Logic. If criteria not met**, select [*Terminate Survey*] from the dropdown list.

10. Click **Save Logic** button to save the logic

11. You can customize the message of **Terminate Survey** if the user is not eligible to submit the survey.

1. Click **Finish Options**.

2. In the section **Terminated Respondent Message**, input the message. For example, "**This survey is for HKBU staff only. Thank you.**".

3. Click **Save Changes**.
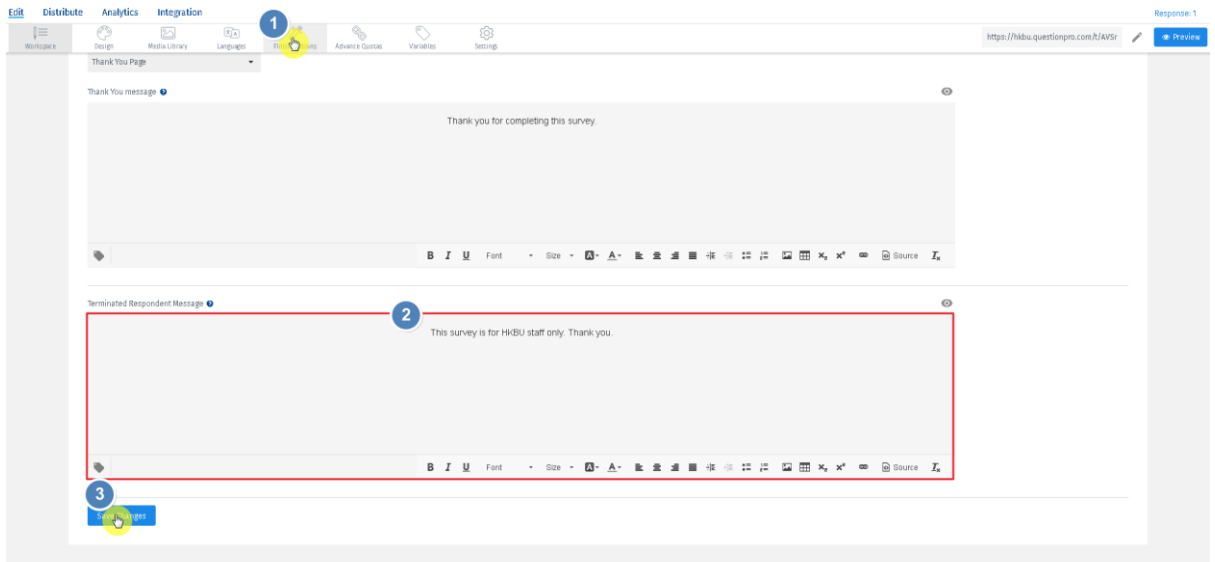
B.2 Limit a survey to HKBU students with SSOid only

Please make sure you have registered the respondent identification information by following **Section A** before proceeding the following steps.

After completed **Section A**, please follow **Section B.1**. For [Step 7] in **Section B.1**, follow the step below instead.

[Step 7]

> For the **New Criteria**, input **Criteria Name:** *Student Only*.
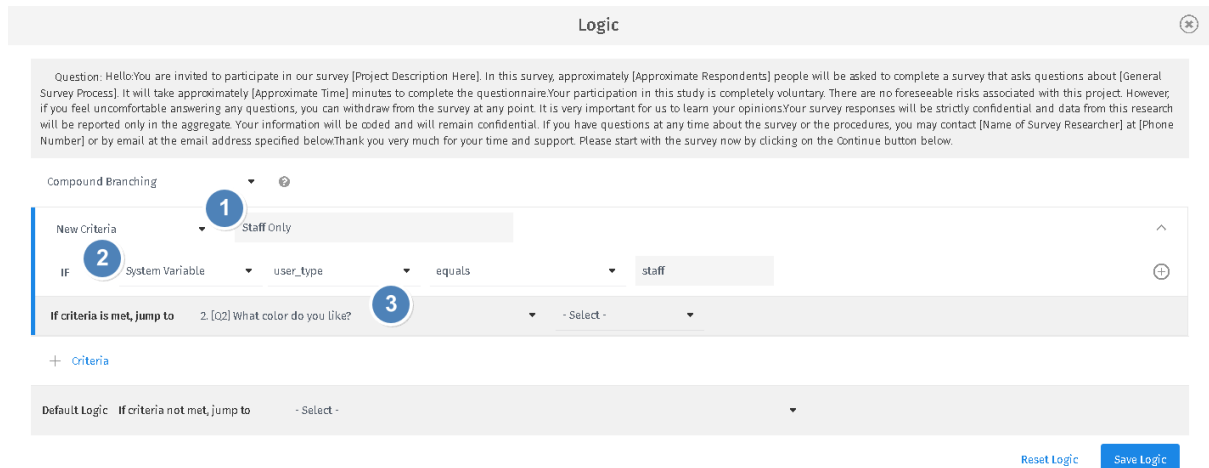> Set the criteria: If [*System Variable*] [*user_type*] [*equals*] [*student*].

B.3 Limit a survey to HKBU staff and students with SSOid only

Please make sure you have registered the respondent identification information by following **Section A** before proceeding the following steps.

After completed **Section A**, please follow **Section B.1**. For [Step 7] in **Section B.1**, follow the step below instead.
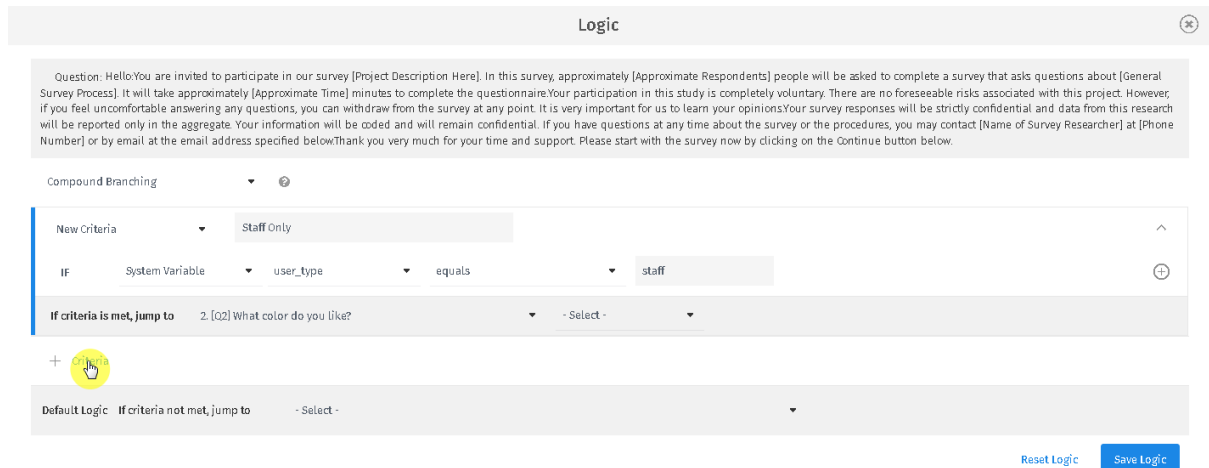
[Step 7]

1. For the **New Criteria**, input **Criteria Name:** *Staff Only*.
2. Set the criteria: If [*System Variable*] [*user_type*] [*equals*] [*staff*].
3. In the section **If criteria is met, jump to**, select the first question you have just created.

4. Click **+ Criteria** button to add another logic to allow students to fill in the survey.

5. For the **New Criteria**, input **Criteria Name:** *Student Only*.
6. Set the criteria: If [*System Variable*] [*user_type*] [*equals*] [*student*].
7. In the section **If criteria is met, jump to**, select the first question you have just created.

8. In the section **Default Logic. If criteria not met**, select [*Terminate Survey*] from the dropdown list.

9. Click **Save Logic** button to save the logic

Screenshot shows the *Logic* after completed all the steps

B.4 Limit a survey to HKBU alumni with SSOid only

Please make sure you have registered the respondent identification information by following **Section A** before proceeding the following steps.

After completed **Section A**, please follow **Section B.1**. For [Step 7] in **Section B.1**, follow the step below instead.

[Step 7]
1. For the **New Criteria**, input **Criteria Name:** *Alumni Only*.
2. Set the criteria: If [*System Variable*] [*user_type*] [*equals*] [*alumni*].
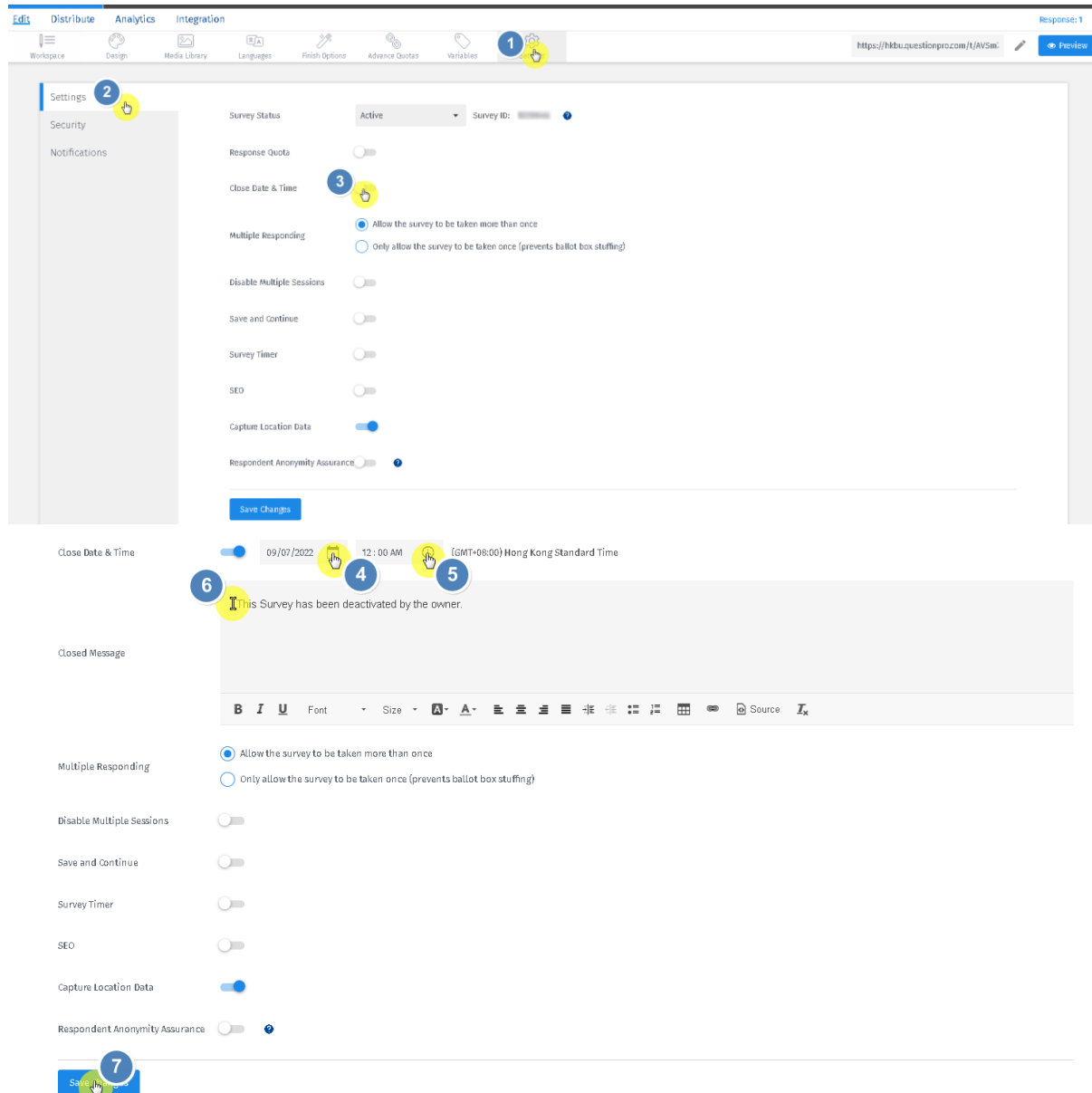
C. Survey Availability Control

You can specify the survey expiration date & time. The survey will be closed automatically at the time you specified.

1. Click **Settings** from the top menu bar.
2. Select **Settings** from the left menu.
3. Toggle on **Close Date & Time.**
4. Select **Close Date.**
5. Select **Close Time.**
6. Input the **Closed Message.**
7. Click **Save Changes.**

Please note that unlike Qualtrics, you cannot control the survey's start date in QuestionPro directly. The survey is accessible by anyone who knows the survey's URL when the survey is active. However, you can schedule to send the survey invitation email alternatively to distribute the survey on a set date and time.

D. Multiple Responding Prevention

You can restrict a survey so that a respondent can only submit a survey once. **The survey must be enabled with the SSOid login protection.** Please follow the steps below to disallow duplicated submission from the same person by checking the email address (Custom Variable 2) of respondents.

Make sure you have registered the respondent identification information by following **Section A**.

1. Click **Settings** from the top menu bar.
2. Select **Settings** from the left menu.
3. **Select option Only allow the survey to be taken once (prevents ballot box stuffing).**
4. Toggle on **Use a custom variable to identify responses**.
5. Select **Custom 2** [hkbu_email] from the drop down.
6. Input the **Multiple Responding** message.
7. **Click Save Changes.**
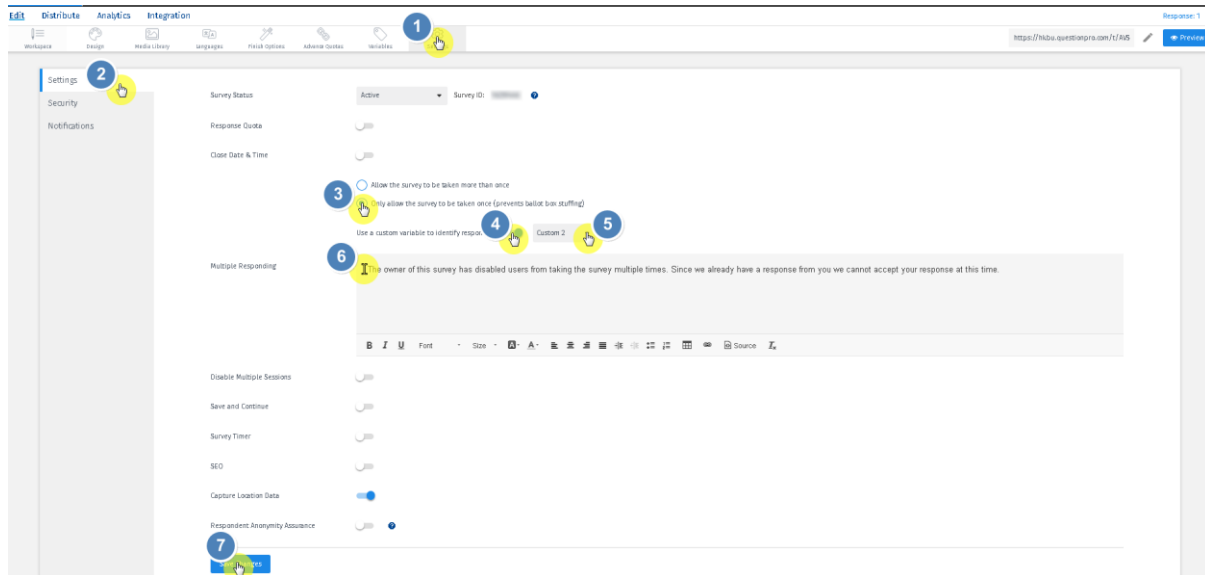
E. Respondent Anonymity Assurance (RAA)

You might want to enable the RAA so that the privacy and confidentiality of the respondents can be protected. In **QuestionPro**, the respondents of a survey can be set to anonymous by enabling the **Respondent Anonymity Assurance (RAA)** option*. After turning on this option, the respondent's information will be masked by **QuestionPro** and will not be disclosed to the survey owner. However, the survey responses can still be collected.

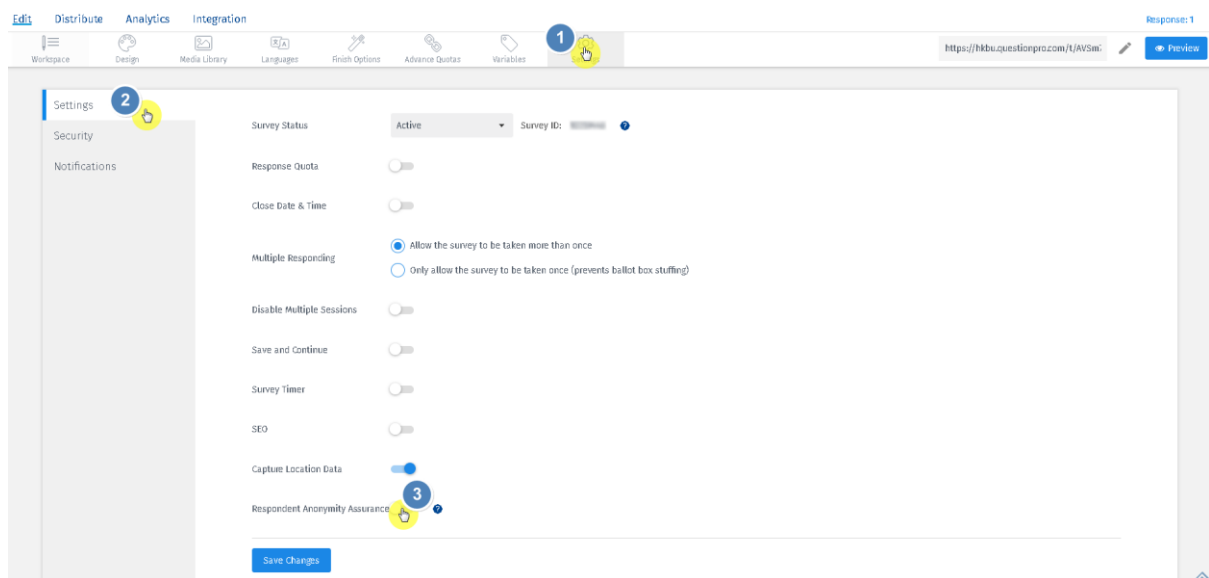*Please be reminded that this option cannot be revoked once it is enabled.*
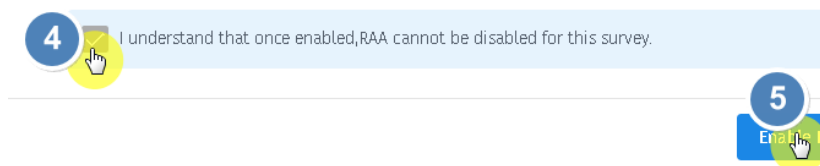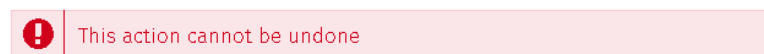
1. Click **Settings** from the top menu bar.
2. Select **Settings** from the left menu.
3. Toggle on **Respondent Anonymity Assurance Enabled**.
4. Read the pop-up message, then click **I understand that once enabled, RAA cannot be disabled for this survey**.
5. Click **Enable RAA**.

After completing the above steps, the respondent's information such as **IP Address**, **Country Code**, **Region** will be masked. To further mask the respondent's identification information (SSOid, email, etc) that were transferred from the SSO system, please toggle on **Mask custom variables 1-5**.

1. Toggle on **Mask custom variables 1-5.**
2. Read the pop-up message, then click **I understand that once custom variables 1-5 are masked, they cannot be viewed with the individual responses.**
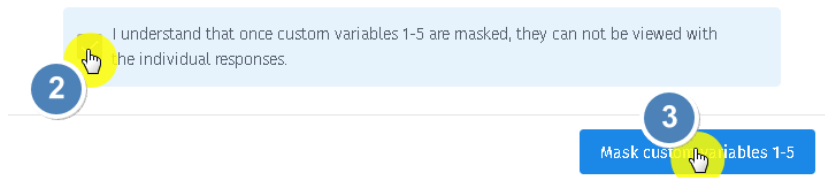3. Click **Mask custom variables 1-5**.

After **RAA** option has been enabled, In the **Response Viewer (Analytics > Responses)**, ***RAA Blocked*** will be shown for the masked data.

F. Differences between Qualtrics and QuestionPro

Features	Qualtrics	QuestionPro
Survey for Staff Only	Available with ITO support	Available (self-service)
Survey for Student Only		
Survey for Staff & Student		
Survey for Alumni	Not Support	
Prevent multiple responses	Available with ITO support	Available (self-service)
Control survey start date & time		By the survey's URL as long as the survey is active
Control survey end date & time		Available (self-service)
Respondent Anonymity Assurance (RAA)		