SSOid Control Enablement User Guide for Qualtrics

Contents

Qualtrics is a web-based survey service for all HKBU Faculty, Students and Staff to support teaching and research at HKBU. By default, survey in Qualtrics is open to anyone. The SSOid control enablement in the Qualtrics 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.

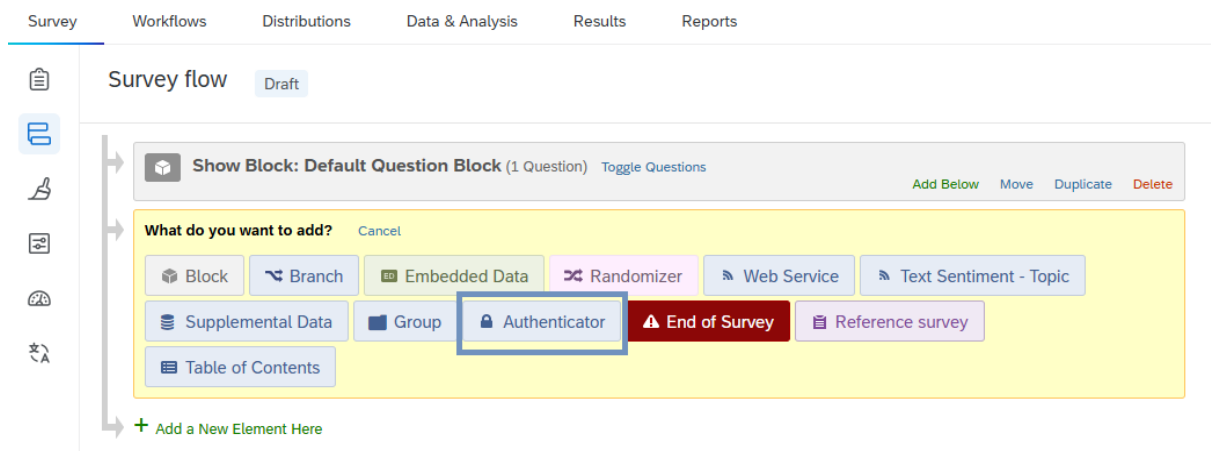## A. Register respondent identification information to a survey

You must first register the respondent identification information by following the steps.

Add Survey Authentication

1. Open your survey.
2. Click **Survey flow** > **+ Add a New Element Here**.
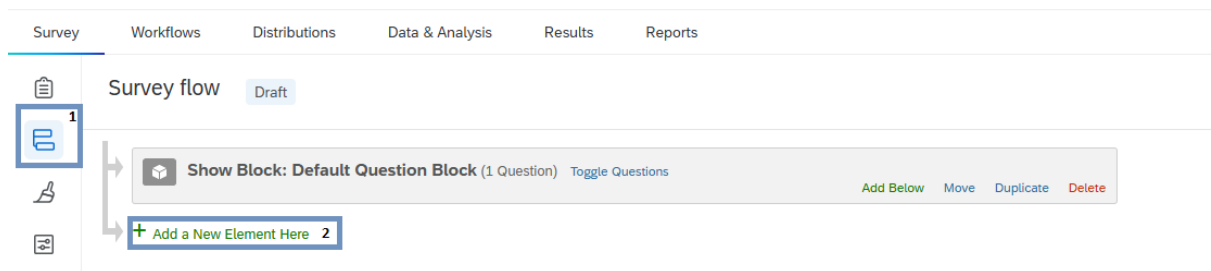
3. Click **Authenticator**

4. Configure variables
   a) Authentication Type: SSO
   b) Disable Associate Respondent With Panel
   c) Enable Capture respondent identifying info
   d) Click Add Embedded Data…

e) Input the embedded data, there are six embedded fields that can be added:
   i.   Dept = urn:oid:2.5.4.11
   ii.   UserType = urn:oid:1.3.6.1.4.1.5923.1.1.1.1
   iii. SSO = urn:oid:0.9.2342.19200300.100.1.1
   iv.   Email = urn:oid:0.9.2342.19200300.100.1.3
   v.   Surname = LastName
   vi.   GivenName = FirstName

5. Select **SSO Type**: Shibboleth
6. Select **Connection**: SSO_SMAL
7. Click **Move** button of Show Block: Default Question Block

8. Darg **and** Drop Question Block(s) under **Branch on Successful Authentication**.

9. Click **Apply** button to save the change.

Respondent Identification Information

After you have added the above variables in **Qualtrics**, when a HKBU user successfully logged in to the **Qualtrics**, six pieces of user information will be transferred from the SSO system to the **Qualtrics**.

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

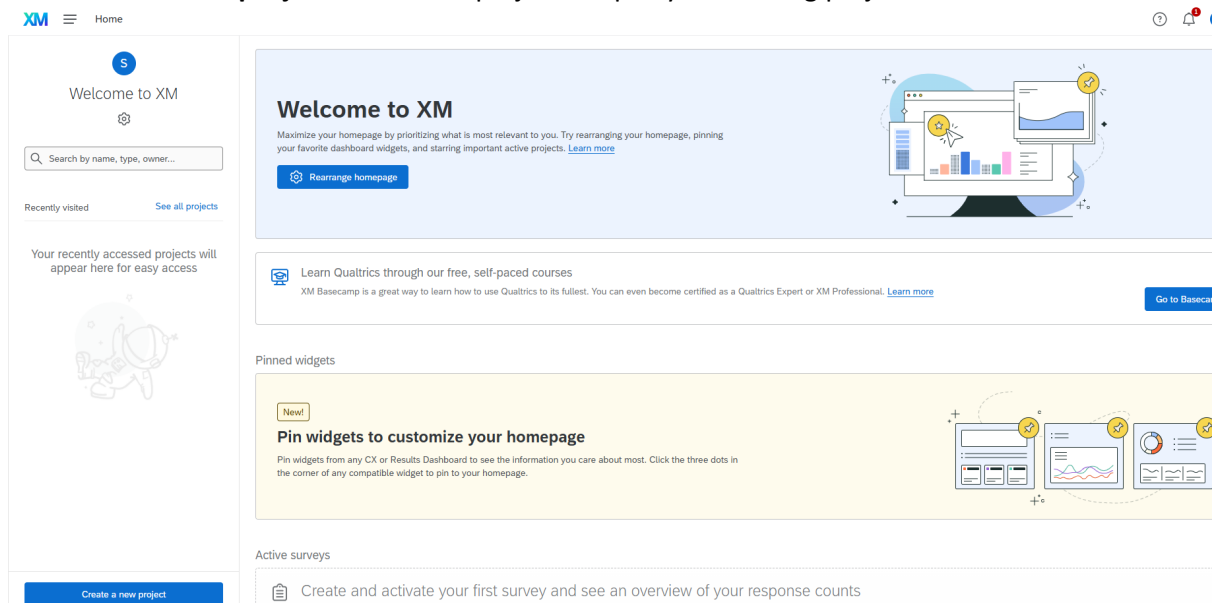You can select Piped Text to insert the Embedded Data Field.

B. Protect a survey with different HKBU user domain

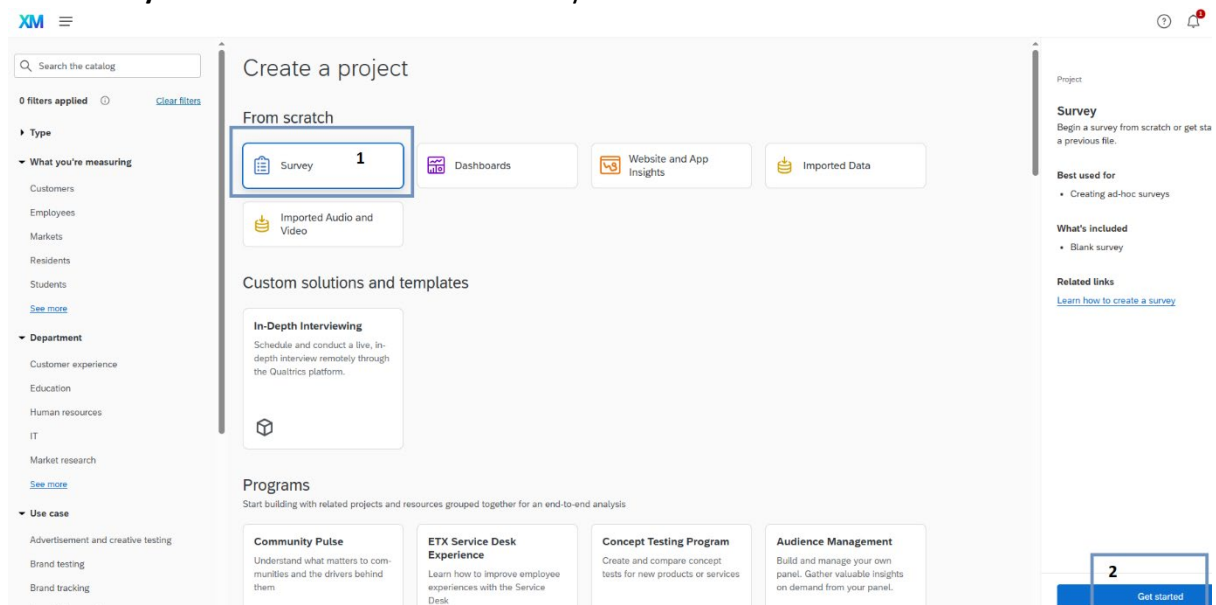You can limit the access to a survey by UserType either

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

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

1. Click **Create a new project** to create a project or open your existing project.

2. Click **Survey** and **Get started** to create a survey.

3. Input survey name and click **Create project** button (for new survey).

Create a new project

Survey

Name

Untitled project

How do you want to start your survey?

Create a blank survey project

Create project

Cancel

4. Click **Survey flow** > **+ Add a New Element Here**.

5. Click Authenticator

6. Configure variables
    a) Authentication Type: SSO
    b) Disable Associate Respondent With Panel
    c) Enable Capture respondent identifying info
    d) Click Add Embedded Data…
    e) UserType = urn:oid:1.3.6.1.4.1.5923.1.1.1.1
    f) Select SSO Type: Shibboleth
    g) Select Connection: SSO_SMAL

7. Click **+ Add a New Element Here**.

8. Click **Branch** to add a logic.

9. Click **Add a Condition**.

10. For the condition, set the condition: if [**Embedded Data**] [**UserType**] [**Is Equal to**] [**staff**], and click **OK**.

11. Click the **Move** button of Question Block(s)

12. Darg and Drop Question Block(s) under **Then Branch If** on meeting the condition.

13. Click **Apply** button to save the logic

B.2 Limit a survey to HKBU students with SSOid only

Please follow **Section B.1**. For [Step 10] in **Section B.1**, follow the step below instead.

[Step 10]

For the condition, set the condition: if [**Embedded Data**] [**UserType**] [**Is Equal to**] [**staff**], and click **OK**.

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

Please follow **Section B.1**. For [Step 10] in **Section B.1**, follow the step below instead.

[Step 10]

For the condition, click **+** button of **Then Branck If** and set the conditions: if [**Embedded Data**] [**UserType**] [**Is Equal to**] [**staff**] [**Or**] [**Embedded Data**] [**UserType**] [**Is Equal to**] [**student**], and click **OK**.

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

Please follow **Section B.1**. For [Step 10] in **Section B.1**, follow the step below instead.

[Step 10]

For the condition, set the condition: if [**Embedded Data**] [**UserType**] [**Is Equal to**] [**alum**], and click **OK**.

C. Survey Availability Control

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

1. Click **Survey Option** from the left menu bar.
2. Select **Responses** from the sub-left menu.
3. Click **Edit survey availability.**
4. Select **Start date** and **Start time.**
5. Select **Expiration date** and **Expiration time.**
6. Click **Save changes.**

D. Multiple Responding Prevention

By default, Shibboleth SSO authenticators allow participants to take the survey multiple times. You can prevent this behavior and allow participants to only take the survey once by creating mailing lists and enabling **Associate Respondent With Panel**. This option forces participants to be a member of the selected contact list in order to take the survey.

1. Click **Survey flow** > **+ Add a New Element Here**.
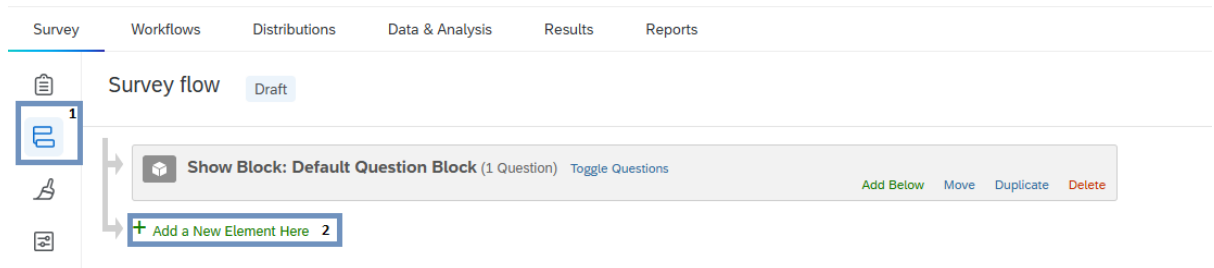
2. Click Authenticator
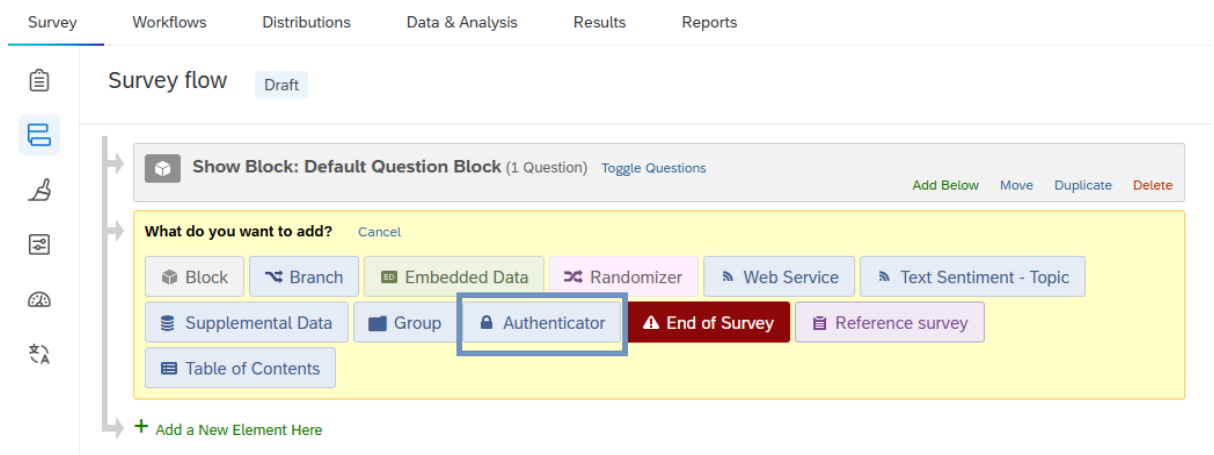
3. Configure variables
   a) Authentication Type: SSO
   b) Enable Associate Respondent With Panel
   c) Select My Library
   d) Select your own mailing list
   e) Select Identified By Field(s): Email
   f) Select SSO Type: Shibboleth
   g) Select Connection: SSO_SMAL

4. Click **Apply** button to save the logic
5. Set **Prevent multiple submissions**
   a) Navigate to **Survey options** in the left menu bar.
   b) Select **Security** from the left sub-menu.
   c) Enable **Prevent multiple submissions** toggle.
   d) Click **Publish** to apply the changes.

E. Respondent Anonymize Responses

You might want to enable the anonymize responses so that the privacy and confidentiality of the respondents can be protected. In **Qualtrics**, the respondents of a survey can be set to anonymous by enabling the **Anonymize responses** option, but the survey responses can still be collected.

1. Click **Survey Option** from the left menu bar.
2. Select **Security** from the left sub-menu.
3. Enable **Anonymize responses** toggle.
4. Click **Publish** to apply the changes.

After completing the above steps, the respondent's information such as IP Address, location data, and contact info will be recorded.

If SSO is used to authenticate respondents, their identity may be verified before they access the survey. This means that while the survey responses themselves can be anonymized, the authentication process may still log identifying information (e.g., SSOids) outside of the survey data.

If you want to maintain anonymity while using SSO, you can configure the SSO authenticator to only verify access without passing identifying information – **Embedded data** into the survey. This setup ensures that the survey responses remain anonymous.

Tokens or identifiers used in SSO are treated as "Customer Data" under Qualtrics' security policies. Qualtrics will only link tokens to responses if explicitly instructed by the customer or required by legal obligations.

F. Differences between Qualtrics and QuestionPro

Features	Qualtrics	QuestionPro
Survey for Staff Only	Available (self-service)	Available (self-service)
Survey for Student Only		
Survey for Staff & Student		
Survey for Alumni		
Prevent multiple responses		
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)		