

SSOid Control Enablement User Guide for Qualtrics

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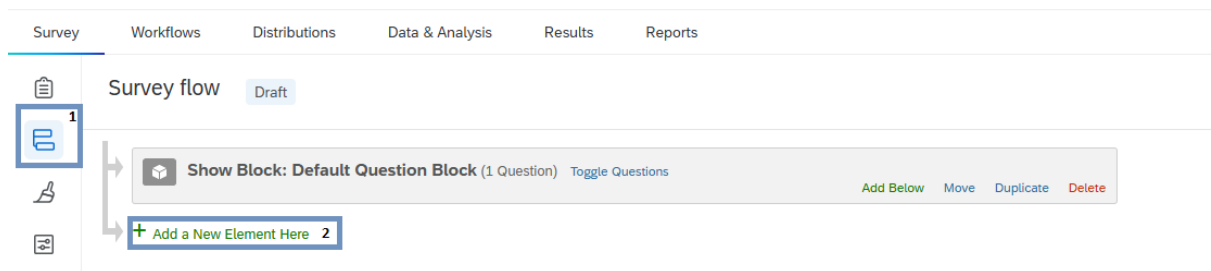
Qualtrics is a web-based survey service for all HKBU Faculty, Students and Staff to support teaching and research at HKBU. By default, survey in Qualtrics is open to anyone. The SSOid control enablement in the Qualtrics can limit the surveys to be accessed and responded by the HKBU faculty, students, 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

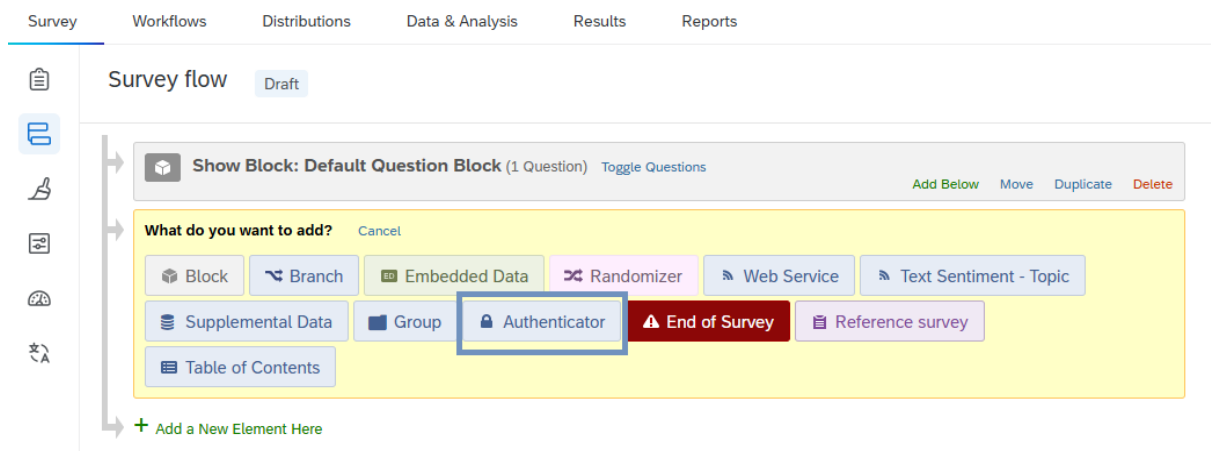
You must first register the respondent identification information by following the steps.

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...

Survey Workflows Distributions Data & Analysis Results Reports

Survey flow Draft

Show Block: Default Question Block (1 Question) Toggle Questions Add Below Move Duplicate Delete

Branch on Successful Authentication

Authentication Type: SSO

☐ Associate Respondent With Panel

☒ Capture respondent identifying info

Add Embedded Data...

SSO Type: Shibboleth

Connection SSO_SAML

This SSO type may not function properly with Preview Survey.

Move Duplicate Options Collapse Delete

e) Input the embedded data, there are six embedded fields that can be added:

- Dept = urn:oid:2.5.4.11
- UserType = urn:oid:1.3.6.1.4.1.5923.1.1.1.1
- SSO = urn:oid:0.9.2342.19200300.100.1.1
- Email = urn:oid:0.9.2342.19200300.100.1.3
- Surname = LastName
- GivenName = FirstName

Survey Workflows Distributions Data & Analysis Results Reports

Survey flow Draft

Show Block: Default Question Block (1 Question) Toggle Questions Add Below Move Duplicate Delete

Branch on Successful Authentication

Authentication Type: SSO

☐ Associate Respondent With Panel

☒ Capture respondent identifying info

Dept = urn:oid:2.5.4.11

UserType = urn:oid:1.3.6.1.4.1.5923.1.1.1.1

SSO = urn:oid:0.9.2342.19200300.100.1.1

Email = urn:oid:0.9.2342.19200300.100.1.3

Surname = LastName

GivenName = FirstName

SSO Type: Shibboleth

Connection SSO_SAML

This SSO type may not function properly with Preview Survey.

Move Duplicate Options Collapse Delete

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

Survey Workflows Distributions Data & Analysis Results Reports

Survey flow Draft

Show Block: Default Question Block (1 Question) Toggle Questions Add Below Move Duplicate Delete

Branch on Successful Authentication

Authentication Type: SSO

☐ Associate Respondent With Panel

☒ Capture respondent identifying info

Need Help?

Dept	=	urn:oid:2.5.4.11	-	+
UserName	=	urn:oid:1.3.6.1.4.1.5923.1.1.1.1	-	+
SSO	=	urn:oid:0.9.2342.19200300.100.1.1	-	+
Email	=	urn:oid:0.9.2342.19200300.100.1.3	-	+
Surname	=	LastName	-	+
GivenName	=	FirstName	-	+

SSO Type: Shibboleth

Connection: SSO_SAML

This SSO type may not function properly with Preview Survey.

Move Duplicate Options Collapse Delete

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

Survey Workflows Distributions Data & Analysis Results Reports

Survey flow Draft

Branch on Successful Authentication

Authentication Type: SSO

☐ Associate Respondent With Panel

☒ Capture respondent identifying info

Need Help?

Dept	=	urn:oid:2.5.4.11	-	+
UserName	=	urn:oid:1.3.6.1.4.1.5923.1.1.1.1	-	+
SSO	=	urn:oid:0.9.2342.19200300.100.1.1	-	+
Email	=	urn:oid:0.9.2342.19200300.100.1.3	-	+
Surname	=	LastName	-	+
GivenName	=	FirstName	-	+

SSO Type: Shibboleth

Connection: SSO_SAML

This SSO type may not function properly with Preview Survey.

Move Duplicate Options Collapse Delete

Show Block: Default Question Block (1 Question) Toggle Questions Add Below Move Duplicate Delete

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

The screenshot shows the 'Survey flow' editor in Qualtrics. The 'Draft' tab is selected. The main configuration area is titled 'Branch on Successful Authentication'. It includes an 'Authentication Type' dropdown set to 'SSO'. Below this, there are checkboxes for 'Associate Respondent With Panel' (unchecked) and 'Capture respondent identifying info' (checked). A list of variables is shown, each with a dropdown menu and a '+' icon: 'Dept' (urn:oid:2.5.4.11), 'UserType' (urn:oid:1.3.6.1.4.1.5923.1.1.1.1), 'SSO' (urn:oid:0.9.2342.19200300.100.1.1), 'Email' (urn:oid:0.9.2342.19200300.100.1.3), 'Surname' (LastName), and 'GivenName' (FirstName). At the bottom, 'SSO Type' is set to 'Shibboleth' and 'Connection' is set to 'SSO_SAML'. A warning message states: 'This SSO type may not function properly with Preview Survey.' Action buttons at the bottom right include 'Move', 'Duplicate', 'Options', 'Collapse', and 'Delete'. Below the main configuration area, there is a 'Show Block: Default Question Block (1 Question)' section with 'Add Below', 'Move', 'Duplicate', and 'Delete' options. At the bottom right of the editor, there are 'Revert' and 'Apply' buttons.

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.

The screenshot shows the 'Edit question' interface in Qualtrics. The 'Question type' is set to 'Text entry'. The 'Text type' is set to 'Multiple lines'. The 'Response requirements' section has 'Add requirements' and 'Add validation' toggled off. The 'Question behavior' section has 'Display logic', 'Skip logic', and 'Default choices' options. The main question area is titled 'Guide' and contains a 'Default Question Block' with a 'Piped Text' field. The 'Piped Text' field is configured with the text 'Welcome \$e'. A dropdown menu is open, showing options for 'Pipe text from a...' including 'Survey Question', 'Embedded Data Field', 'GeoIP Location', 'Survey Links', 'Date / Time', 'Opt Out Link', 'Random Number', 'Panels Field', and 'Loop & Merge'. The 'Embedded Data Field' option is selected, and a search bar is visible with the text 'Search...'. Below the search bar, a list of variables is shown: 'Dept', 'UserType', 'SSO', 'Email', 'Surname', and 'GivenName'.

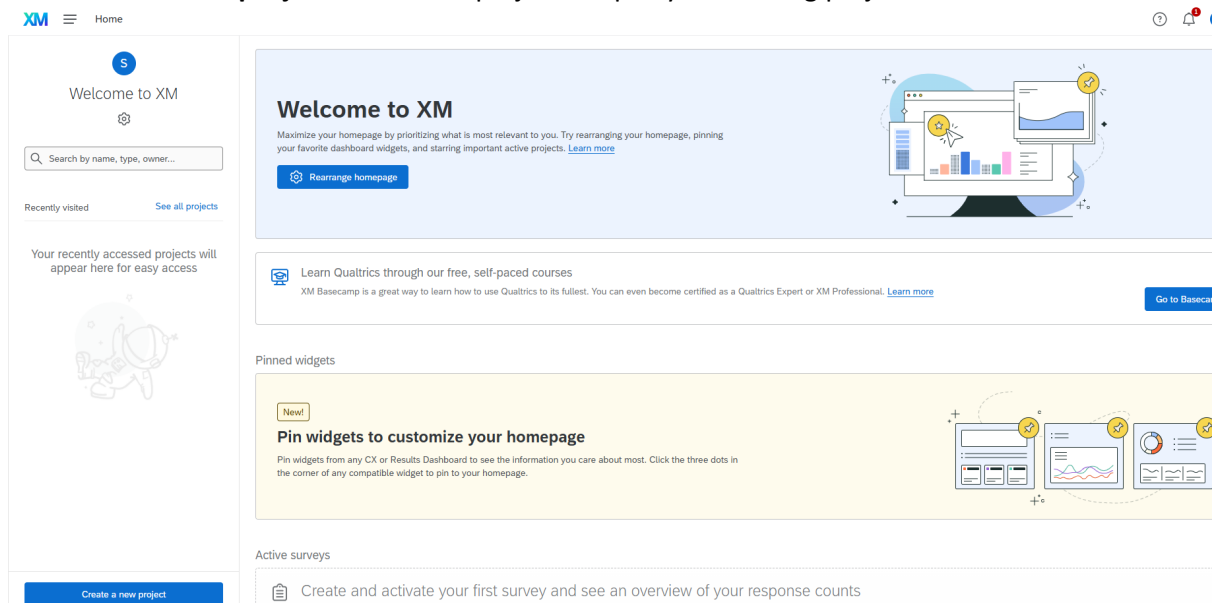
B. Protect a survey with different HKBU user domain

You can limit the access to a survey by UserType either

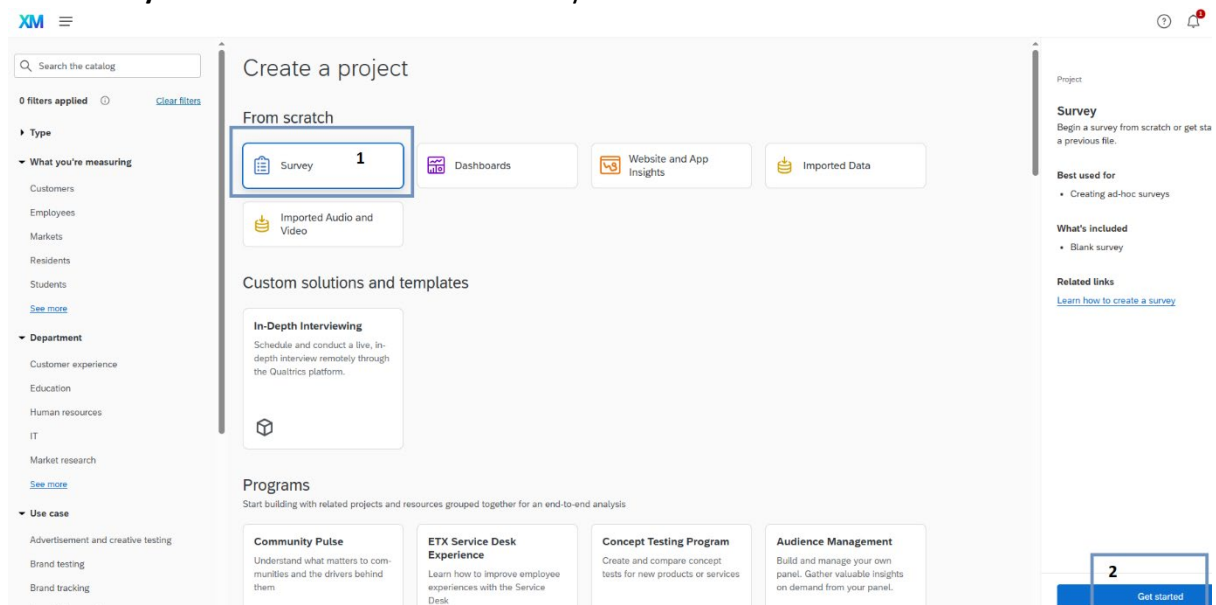
- Staff, or
- Students, or
- Staff and Students, or
- Alumni

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**.

Survey flow Draft

Show Block: Default Question Block (1 Question) Toggle Questions

Add Below Move Duplicate Delete

+ Add a New Element Here 2

5. Click Authenticator

Survey flow Draft

Show Block: Default Question Block (1 Question) Toggle Questions

Add Below Move Duplicate Delete

What do you want to add? Cancel

Block Branch Embedded Data Randomizer Web Service Text Sentiment - Topic

Supplemental Data Group Authenticator End of Survey Reference survey

Table of Contents

+ Add a New Element Here

6. Configure variables

- Authentication Type: SSO
- Disable Associate Respondent With Panel
- Enable Capture respondent identifying info
- Click Add Embedded Data...
- UserType = urn:oid:1.3.6.1.4.1.5923.1.1.1.1
- Select SSO Type: Shibboleth
- Select Connection: SSO_SMAL

Survey Workflows Distributions Data & Analysis Results Reports

Survey flow Draft

Show Block: Default Question Block (1 Question) Toggle Questions Add Below Move Duplicate Delete

Branch on Successful Authentication

Authentication Type: SSO

☐ Associate Respondent With Panel Need Help?

☒ Capture respondent identifying info

UserType = urn:oid:1.3.6.1.4.1.5923.1.1.1.1

SSO Type: Shibboleth

Connection SSO_SAML

This SSO type may not function properly with Preview Survey.

Move Duplicate Options Collapse Delete

+ Add a New Element Here

7. Click + Add a New Element Here.

Survey Workflows Distributions Data & Analysis Results Reports

Survey flow Draft

Show Block: Default Question Block (1 Question) Toggle Questions Add Below Move Duplicate Delete

Branch on Successful Authentication

Authentication Type: SSO

☐ Associate Respondent With Panel Need Help?

☒ Capture respondent identifying info

UserType = urn:oid:1.3.6.1.4.1.5923.1.1.1.1

SSO Type: Shibboleth

Connection SSO_SAML

This SSO type may not function properly with Preview Survey.

Move Duplicate Options Collapse Delete

+ Add a New Element Here

+ Add a New Element Here

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

Survey Workflows Distributions Data & Analysis Results Reports

Survey flow Draft

Show Block: Default Question Block (1 Question) Toggle Questions Add Below Move Duplicate Delete

Branch on Successful Authentication

Authentication Type: SSO

☐ Associate Respondent With Panel

☒ Capture respondent identifying info

UserType = urn:oid:1.3.6.1.4.1.5923.1.1.1.1

SSO Type: Shibboleth

Connection SSO_SAML

This SSO type may not function properly with Preview Survey.

Move Duplicate Options Collapse Delete

What do you want to add? Cancel

Block Branch Embedded Data Randomizer Web Service Text Sentiment - Topic

Supplemental Data Group Authenticator End of Survey Reference survey

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+ Add a New Element Here

9. Click **Add a Condition**.

Survey Workflows Distributions Data & Analysis Results Reports

Survey flow Draft

Show Block: Default Question Block (1 Question) Toggle Questions Add Below Move Duplicate Delete

Branch on Successful Authentication

Authentication Type: SSO

☐ Associate Respondent With Panel

☒ Capture respondent identifying info

UserType = urn:oid:1.3.6.1.4.1.5923.1.1.1.1

SSO Type: Shibboleth

Connection SSO_SAML

This SSO type may not function properly with Preview Survey.

Move Duplicate Options Collapse Delete

This branch will not be triggered until you Add a Condition

Move Duplicate Options Collapse Delete

+ Add a New Element Here

+ Add a New Element Here

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

Survey Workflows Distributions Data & Analysis Results Reports

Survey flow Draft

Show Block: Default Question Block (1 Question) Toggle Questions Add Below Move Duplicate Delete

Branch on Successful Authentication

Authentication Type: SSO

☐ Associate Respondent With Panel

☒ Capture respondent identifying info

UserType = urn:oid:1.3.6.1.4.1.5923.1.1.1.1

SSO Type: Shibboleth

Connection: SSO_SAML

This SSO type may not function properly with Preview Survey.

Move Duplicate Options Collapse Delete

Then Branch If:

Embedded Data UserType Is Equal to staff

OK

+ Add a New Element Here

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

Survey Workflows Distributions Data & Analysis Results Reports

Survey flow Draft

Show Block: Default Question Block (1 Question) Toggle Questions Add Below Move Duplicate Delete

Branch on Successful Authentication

Authentication Type: SSO

☐ Associate Respondent With Panel

☒ Capture respondent identifying info

UserType = urn:oid:1.3.6.1.4.1.5923.1.1.1.1

SSO Type: Shibboleth

Connection: SSO_SAML

This SSO type may not function properly with Preview Survey.

Move Duplicate Options Collapse Delete

Then Branch If:

If UserType Is Equal to staff Edit Condition

Move Duplicate Options Collapse Delete

+ Add a New Element Here

+ Add a New Element Here

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

Survey Workflows Distributions Data & Analysis Results Reports

Survey flow Draft

Branch on Successful Authentication

Authentication Type: SSO

☐ Associate Respondent With Panel

☒ Capture respondent identifying info

UserType = urn:oid:1.3.6.1.4.1.5923.1.1.1.1

SSO Type: Shibboleth

Connection: SSO_SAML

This SSO type may not function properly with Preview Survey.

Need Help?

Move Duplicate Options Collapse Delete

Then Branch If:

If UserType Is Equal to staff Edit Condition

Move Duplicate Options Collapse Delete

Show Block: Default Question Block (1 Question) Toggle Questions

Add Below Move Duplicate Delete

+ Add a New Element Here

+ Add a New Element Here

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

Survey Workflows Distributions Data & Analysis Results Reports

Survey flow Draft

Show flow IDs Collapse all

Branch on Successful Authentication

Authentication Type: SSO

☐ Associate Respondent With Panel

☒ Capture respondent identifying info

UserType = urn:oid:1.3.6.1.4.1.5923.1.1.1.1

SSO Type: Shibboleth

Connection: SSO_SAML

This SSO type may not function properly with Preview Survey.

Need Help?

Move Duplicate Options Collapse Delete

Then Branch If:

If UserType Is Equal to staff Edit Condition

Move Duplicate Options Collapse Delete

Show Block: Default Question Block (1 Question) Toggle Questions

Add Below Move Duplicate Delete

+ Add a New Element Here

+ Add a New Element Here

+ Add a New Element Here

Revert Apply

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**.

The screenshot shows the 'Survey flow' configuration interface. The 'Survey flow' tab is selected, and the 'Draft' status is shown. The main configuration area is titled 'Branch on Successful Authentication'. It includes the following settings:

- Authentication Type:** SSO (dropdown)
- ☐ Associate Respondent With Panel
- ☒ Capture respondent identifying info
- UserType:** um:oid:1.3.6.1.4.1.5923.1.1.1.1 (text input)
- SSO Type:** Shibboleth (dropdown)
- Connection:** SSO_SAML (dropdown)

Below these settings, there is a note: 'This SSO type may not function properly with Preview Survey.' At the bottom right of the configuration area, there are buttons: 'Move', 'Duplicate', 'Options', 'Collapse', and 'Delete'.

Below the main configuration area, there is a 'Then Branch If:' section. It contains a condition: 'Embedded Data' (dropdown) 'UserType' (text input) 'Is Equal to' (dropdown) 'student' (text input). At the bottom right of this section, there are buttons: 'Move', 'Duplicate', 'Options', 'Collapse', 'Delete', and a green 'OK' button.

At the bottom of the interface, there is a green button labeled '+ Add a New Element Here'.

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 Branch If** and set the conditions: if [Embedded Data] [UserType] [Is Equal to] [staff] [Or] [Embedded Data] [UserType] [Is Equal to] [student], and click OK.

The screenshot displays the 'Survey flow' interface in a 'Draft' state. The main configuration area is titled 'Branch on Successful Authentication'. It includes the following settings:

- Authentication Type:** SSO
- ☐ Associate Respondent With Panel
- ☒ Capture respondent identifying info
- UserType:** urn:oid:1.3.6.1.4.1.5923.1.1.1.1
- SSO Type:** Shibboleth
- Connection:** SSO_SAML

Below these settings is a note: 'This SSO type may not function properly with Preview Survey.' At the bottom right of this section are buttons for 'Move', 'Duplicate', 'Options', 'Collapse', and 'Delete'.

Below the authentication settings is the 'Then Branch If' configuration area. It contains two conditions:

- Condition 1: Embedded Data ▼ UserType Is Equal to ▼ staff
- Condition 2: Or ▼ Embedded Data ▼ UserType Is Equal to ▼ student

Each condition has a red minus button and a green plus button. At the bottom right of the 'Then Branch If' area is a green 'OK' button. Below the 'Then Branch If' area is a blue arrow pointing to a green plus button with the text 'Add a New Element Here'.

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**.

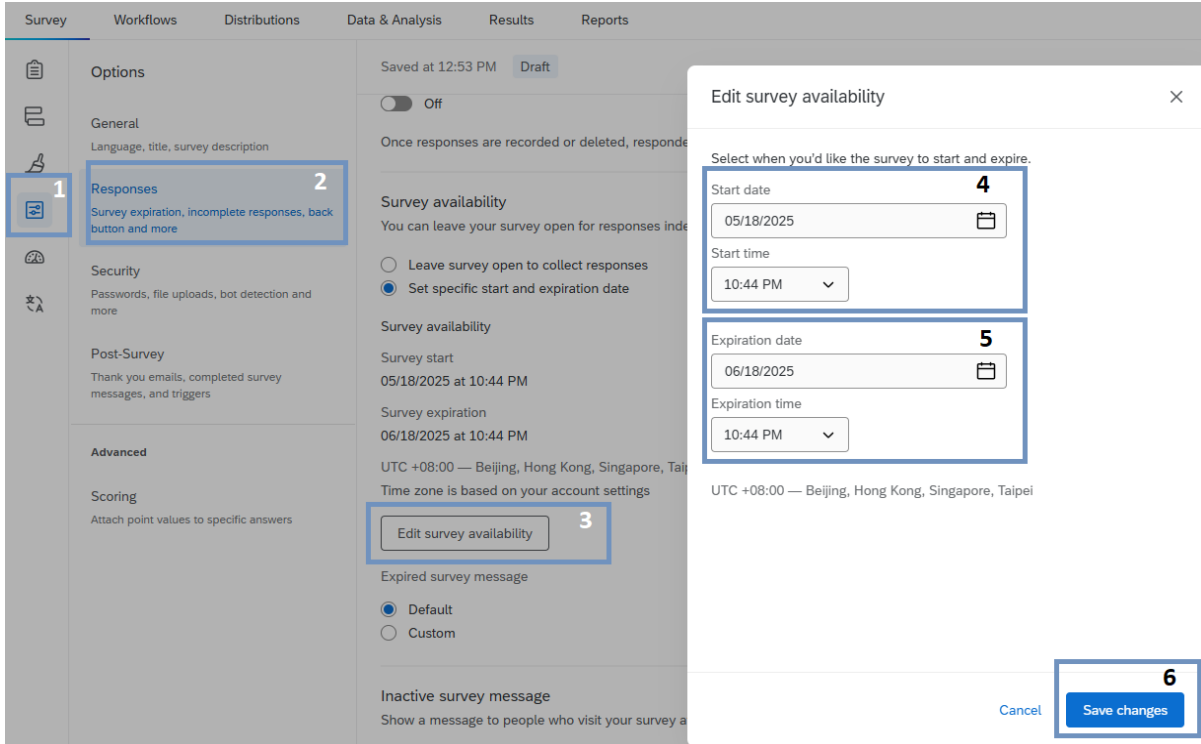
The screenshot displays the 'Survey flow' configuration page in a 'Draft' state. The interface includes a top navigation bar with tabs: Survey, Workflows, Distributions, Data & Analysis, Results, and Reports. On the left, there is a sidebar with icons for survey management. The main content area shows a 'Survey flow' diagram with two blocks:

- Show Block: Default Question Block (1 Question)**: This block has options to 'Add Below', 'Move', 'Duplicate', and 'Delete'.
- Branch on Successful Authentication**: This block is configured with the following settings:
 - Authentication Type**: SSO (dropdown)
 - Associate Respondent With Panel**: Unchecked
 - Capture respondent identifying info**: Checked
 - UserType**: um:oid:1.3.6.1.4.1.5923.1.1.1.1 (text input)
 - SSO Type**: Shibboleth (dropdown)
 - Connection**: SSO_SAML (dropdown)
 - Need Help?**: Link
 - Footer note**: This SSO type may not function properly with Preview Survey.
 - Actions**: Move, Duplicate, Options, Collapse, Delete
- Then Branch If:**: This block is configured with the following settings:
 - Embedded Data**: Embedded Data (dropdown)
 - UserType**: UserType (text input)
 - Is Equal to**: Is Equal to (dropdown)
 - alum**: alum (text input)
 - Actions**: Red minus, Green plus, and a green **OK** button.

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**.

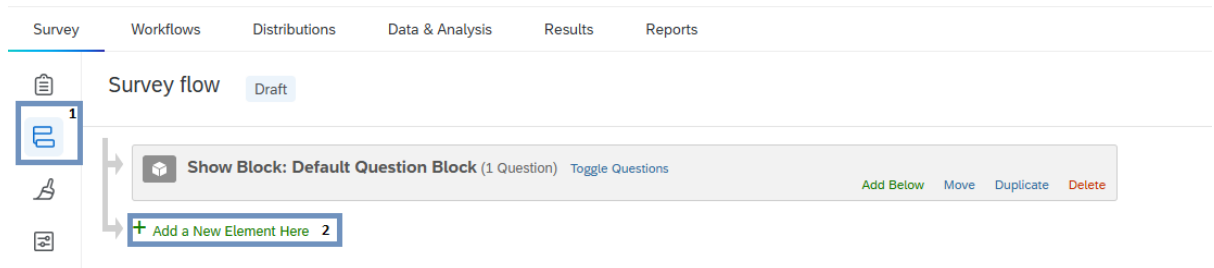


The screenshot displays the 'Survey' management interface. On the left, the 'Options' menu is visible, with 'Responses' selected. The main area shows survey settings, including 'Survey availability' options. A modal window titled 'Edit survey availability' is open, allowing the user to specify start and expiration dates and times. The 'Start date' is set to 05/18/2025 and the 'Start time' is 10:44 PM. The 'Expiration date' is set to 06/18/2025 and the 'Expiration time' is 10:44 PM. The 'Save changes' button is highlighted in the bottom right corner of the modal.

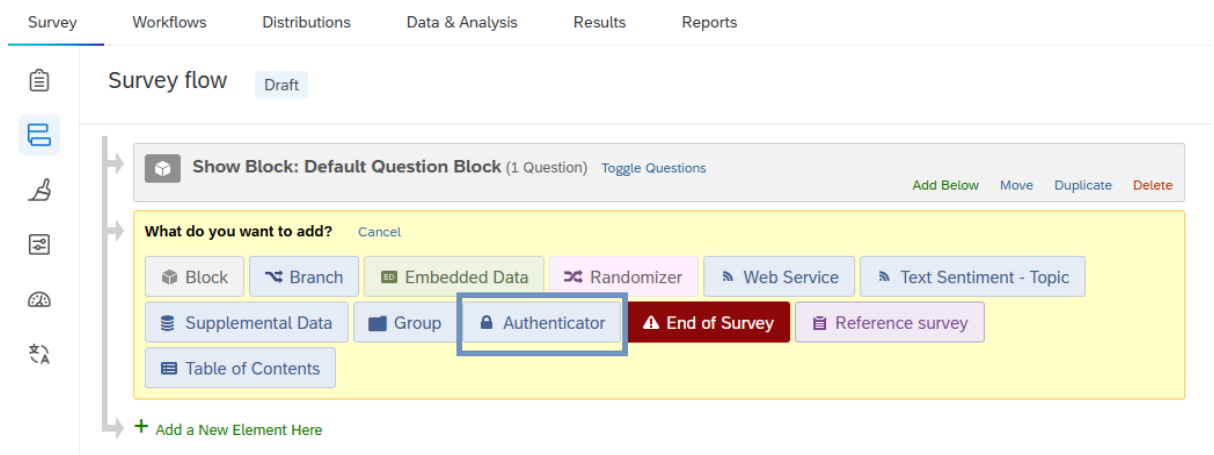
D. Multiple Responding Prevention

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

Survey Workflows Distributions Data & Analysis Results Reports

Survey flow Draft

Show flow IDs Collapse all

Branch on Successful Authentication

Authentication Type: SSO

☒ Associate Respondent With Panel

My Library: Test Test Mailing List (Testing)

Identified By Field(s):

Email

☐ Capture respondent identifying info

SSO Type: Shibboleth

Connection: SSO_SAML

This SSO type may not function properly with Preview Survey.

Move Duplicate Options Collapse Delete

Show Block: Default Question Block (1 Question) Toggle Questions

Add Below Move Duplicate Delete

Revert Apply

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.

Survey Workflows Distributions Data & Analysis Results Reports

Options

General
Language, title, survey description

a Responses
Survey expiration, incomplete responses, back button and more

b Security
Passwords, file uploads, bot detection and more

Post-Survey
Thank you emails, completed survey messages, and triggers

Advanced

Scoring
Attach point values to specific answers

Saved at 6:26 PM Draft

Preview **d** Publish

Add a referral website URL
Allow people to take your survey only if they select a survey link included on a specific website.

☐ Off

Prevent multiple submissions
Prevent respondents from taking your survey multiple times. You can choose to end the survey, redirect them to a website or flag the response.

☒ On **c**

Action

End survey with a message

End of survey message

☒ Default

☐ Custom

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.

The screenshot shows the Qualtrics Survey Options interface. The left sidebar contains a menu with 'Options' selected. Under 'Options', 'Security' is highlighted with a blue box and a '2' label. The main content area shows the 'Security' settings. The 'Anonymize responses' toggle is turned 'On' and is highlighted with a blue box and a '3' label. The 'Publish' button in the top right corner is highlighted with a blue box and a '4' label. The 'Responses' section is also visible with a '1' label.

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		By the survey's URL as long as the survey is active
Control survey start date & time		
Control survey end date & time		Available (self-service)
Respondent Anonymity Assurance (RAA)		