Qualtrics: Use Authentication and Authentication Data

In some surveys, you may want to require respondents to log in to a survey in order to capture information about them, such as their Lehigh userID, name or email address. Follow the steps below to set up authentication requiring respondents to log in using their Lehigh userID and password prior to taking the survey. Please note that the "Preview Survey" and the "Look and Feel" function do not work with the Authenticator active. Do all survey testing prior to adding authentication. Make sure to test authentication and results prior to sending out the survey.

1. From the Edit Survey tab, click the Survey Flow link at the top of the page.

2. From the Survey Flow page, click the + Add a New Element Here link. Note that this element needs to appear at the beginning of the survey flow, before your blocks of questions. Use the Move button below the element to move the authentication block to the top.

3. From the list of options available to add, click the Authenticator button.

4. Make these changes:
   1. From Authentication Type, select SSO.
   2. Uncheck the box next to "Associate Respondent With Panel."
   3. Check the box next to "Capture Respondent Identifying Info."
   4. Select Shibboleth as the SSO Type.

5. Decide what attributes you wish to use. Available attributes are shown in the image to the right.

6. Click ‘Add Embedded Data’.
   There are two fields to complete for each piece of embedded data. The first field, Embedded data to set, can be a name of your choosing (Note: It is case sensitive and spaces may be used). The second field, Field from SSO, should contain the code from the middle column of the image in Step 5, e.g., urn:oid:2.5.4.3. You can copy and paste the codes below (begin with urn:) into the Field from SSO field.
   - First name -- urn:oid:2.5.4.42
   - Username -- urn:oid:0.9.2342.19200300.100.1.1
   - Full name -- urn:oid:2.5.4.3
   - Surname -- oid:2.5.4.4
   - Email -- urn:oid:0.9.2342.19200300.100.1.3
   - Primary affiliation -- urn:oid:1.3.6.1.1.5923.1.1.1.5

7. Click ‘Save Flow’. The embedded data will appear in the results of your survey.

8. You can also insert embedded data into your survey questions or text. To do this...
   1. Select the Piped Text tab while editing text in your survey items.
   2. Select Embedded Data Field from the dropdown menu.
   3. Enter the field name you defined in the authentication block (e.g., Username). Note that this field is case sensitive so enter the field name exactly as it appears in the authentication block.
9. The embedded field will look like this in the text of the survey item. The survey taker will see his or her information (e.g., name) where the variable appears. Make sure to test all aspects of the authentication and embedding of text before you distribute your survey!