Qualtrics Security Guide for Harvard University

Qualtrics is a powerful tool available to the Harvard community that enables a user to efficiently collect and analyze data. Like any tool, understanding safe and effective use of Qualtrics is crucial to achieving its users' desired results. While this document is an important guide for general security, feel free to contact HUIT Security to receive detailed advice for specific needs.

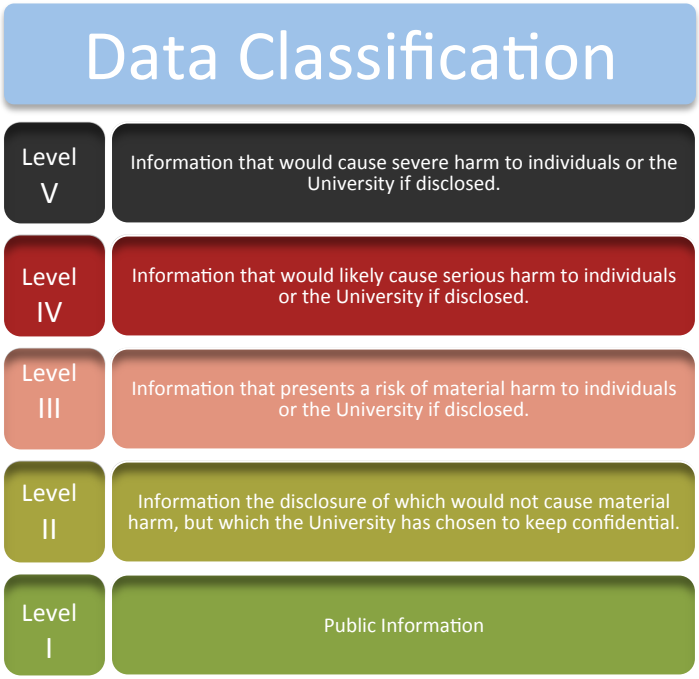
Planning The Survey

A well thought out plan is important for the success of any project. When planning your Qualtrics Survey, make sure to consider the following questions:

- What type of data is being collected?
- Who will have access to this data?
- Where will the data be collected and accessed?
- When will the project conclude?

What Type of Data is Being Collected?

Harvard classifies data in five categories based on the effects of its potential disclosure. The full data classification table and examples can be found here or at www.security.harvard.edu/resources.



Security personnel should review any project that collects data classified beyond Level II. When planning a survey, the Qualtrics user should consider the data they are collecting. The best way to prevent data from being disclosed is not to collect it. Once collected, protection of the data becomes the user's responsibility. Limit the data collected to information required for the research or study. Pay special attention to identifiers such as names and social security numbers.

Note:
De-Identified Data, or data that cannot be directly linked to an individual, is intrinsically less risky to maintain. For guidance relating to the effective use of de-identified data, contact the Office of the Vice Provost for Research at http://vpr.harvard.edu/home.

Who will have access to the data?

The Qualtrics user is provided many options for collaboration. Individuals from inside and outside the Harvard community can be granted access to a survey, its responses, and its results. Collaborators can be granted very specific permissions, and it is not likely that a survey would require all collaborators to have full rights for the duration of a project. With that in mind, tailor the permissions by considering the following questions:

- Should this collaborator be able to change, add or delete questions from the survey?
- Should they be able to remove any results?
- Is it necessary for the collaborator to see individual responses at all, or would the aggregate survey results be sufficient?
- When is input or insight needed from the collaborator?

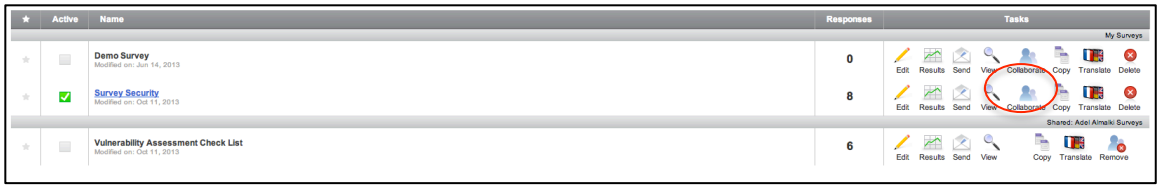
Consider filling out a Collaboration Matrix, similar to the sample provided below.

NAME	Area of Expertise	Permissions Granted	Permission Timeline	Purpose
Micah Nelson	Information Security	View Questions View Survey	Revoked at survey launch	Provide support in creating a secure survey.
J.R.R Tolkien	Elven Languages	View Responses	Granted for two weeks after survey closed	Translation of Elven Responses to English.
J.P. Morgan	Investing	View Results	Granted at launch until study completed	Provide insight into economic implication of results

Once you have chosen your collaborators, make sure they understand their responsibilities.

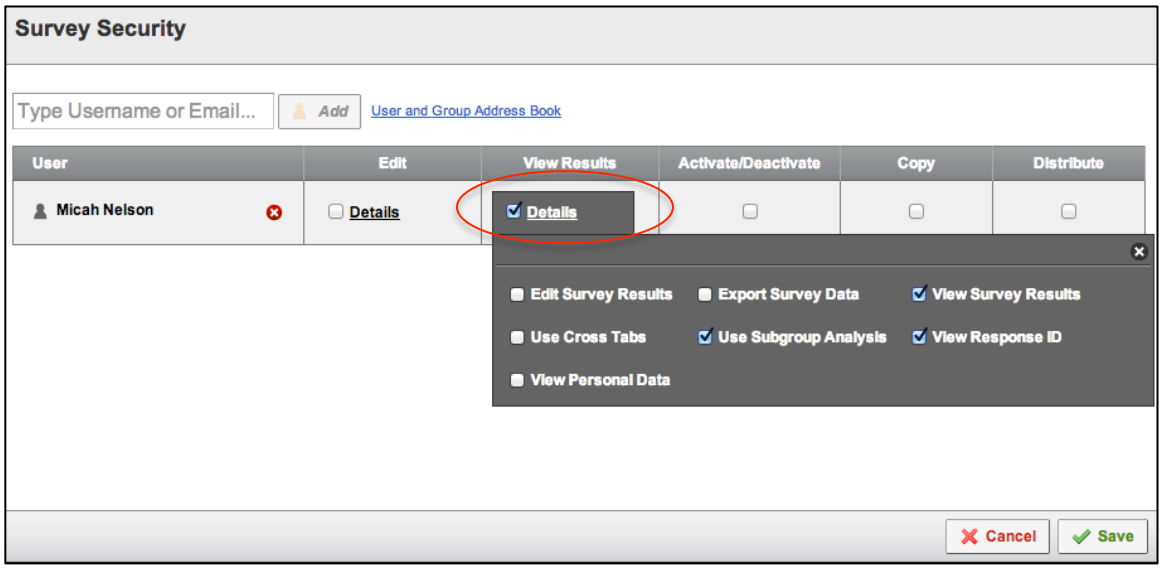
- Accounts should never be shared. If survey creators wish to bring in the opinions of others, the other users should be added as collaborators with their Harvard Qualtrics account, a Qualtrics account supported by their institution, or a free Qualtrics account.
- Accounts should use Harvard credentials for identification and authentication whenever possible.
- Accounts for non-Harvard users should require complex passwords. See Security.Harvard.edu for specific guidance on passwords.

Now that the collaborators have been informed of their roles and responsibilities, they can be granted specific rights within Qualtrics.



Click “Collaborate” next to the selected survey.

If you’re collaborating with a Harvard affiliate, search for the user by his or her name in the popup box. Please note that the affiliate will need to log in to Qualtrics via the SurveyTools page at least once in order to show up in the directory. If you’re collaborating with a user outside of Harvard, simply use his or her email address.



Click “Details” to assign specific rights to the collaborator. Click Save when finished assigning permissions.

Where Will the Data be Collected and Assessed?

Though Qualtrics provides security for your data when it is stored on their servers, they cannot protect it before it gets to them or after it has been delivered to a collaborator's web browser. Securing those parts of the process is known as "endpoint" security. Improve endpoint security by following this guide.

Bad Idea	Good Idea	Why?
Clicking links from people you don't know, or weird links from people you do know.	Assume links in email are bogus. Use your browser's address and search options to get you where you need to go (e.g. https://www.paypal.com or https://www.facebook.com)	Links can point one way and take you another. This is one of the most common ways accounts are stolen. You don't need to follow the email link to check on your accounts. When in doubt, type it out.
Ignoring Updates from Microsoft, Adobe, Java, or other sources	Set up an automatic patch schedule.	Most common attacks are carried out using bugs that have patches available because attackers know many people don't update.
Accessing sensitive information in public places such as a coffee shop.	Limit use of laptops in public settings. Use password protected screen locks.	Stepping away for even a few moments provides enough time for a stranger to be "you" on the internet. A locked screen protects your reputation and data.
Uninstalling or disabling antivirus software.	Use up to date antivirus software on your system.	Antivirus is your last line of defense against being hacked. Find one that works for you and keep it up to date. Contact ithelp@harvard.edu for options.

Consider creative alternatives in situations where weak endpoint security is suspected. For example, smartphones and tablets offer higher levels of endpoint security than most desktop or laptop computers.

When Will This Project Conclude?

Create a timeline for the Survey. Make sure to cover the following milestones.

- Survey Created

- Survey Open for Responses
- Survey Closed for Responses
- Data Analysis
- Project Closed

Each of these milestones will represent a possible trigger for the Survey administrator, from adding a collaborator to locking results. Plan the schedule so that data isn't present for longer than needed.

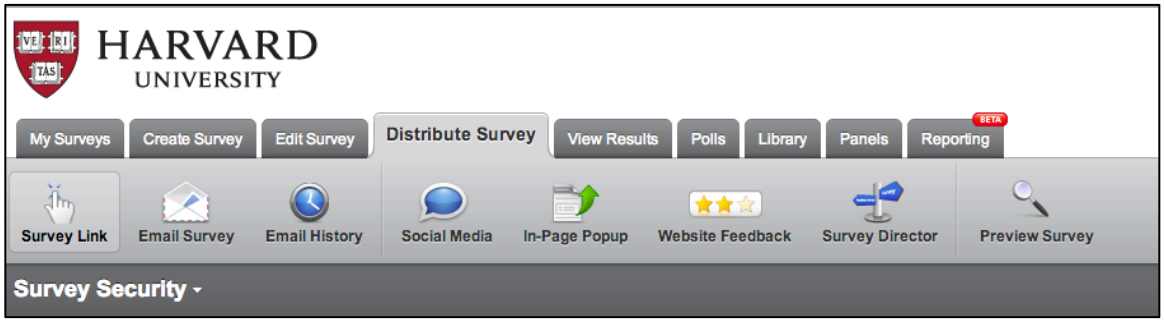
When the project is completed, there are several options for handling the data. It can be deleted, downloaded, or maintained on the Qualtrics servers.

	Maintain with Qualtrics	**Delete**	**Download**
PRO	Easily Access results for reference or further study.	Most Secure way to prevent data loss	Save the data in a format that can be manipulated by third-party tools
CON	Potential for Data Breach	The data cannot be retrieved for further reference. Some projects require ongoing access to data.	Burden of data protection is on the user. Depending on the data, there may be regulatory requirements.

No matter what path is taken, the survey should be deactivated and all collaborators no longer requiring access should be removed at the conclusion of your project.

Collecting Data

With your project planned and survey published, it is time to solicit responses. Qualtrics surveys can be distributed through several channels.



Options exist to distribute surveys via links, emails, various social media outlets, and custom webpage popups. Use these options to specifically target the sought after respondents. Limiting the publicity of the survey is a good way to limit risk. For example, if you don't need feedback from the general Internet, don't tweet the link.

At a Glance

Remember these tips to building a secure survey in Qualtrics.

Tips for a Secure Survey	Ask Yourself…
1. Collect only the data you need.	What data am I willing to be accountable for?
2. Only Access Qualtrics From Trusted Devices.	Would I do online banking on this device?
3. Collaborate with People You Trust.	Would I trust this person with my personal Information?
4. Give the appropriate rights to the appropriate collaborators.	Do I want an opinion on everything from everyone?
5. Use Calendar Reminders to remember to add, edit, or remove collaborators.	Will I remember any of this six months from now without help?
6. Share your Survey Link responsibly.	Do I really need respondents from my second cousin's Facebook page?
7. If you have a concern, bring it to HUIT Security.	Isn't that what they are there for in the first place?

Closing

With proper planning and execution, the Qualtrics research suite can be a secure and effective way to carry out information gathering and collaboration for most any project. We hope this guide has been helpful.

Remember, specific support and assistance is always available by contacting HUIT Security www.security.harvard.edu