

Qualtrics Taker Authentication: how to set up your survey

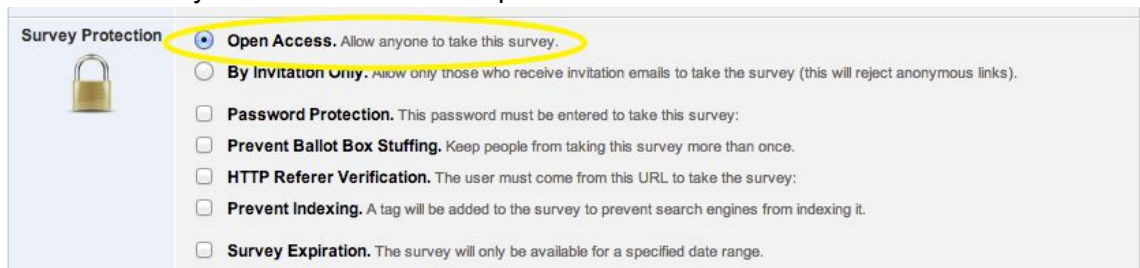
People taking Qualtrics surveys are generally not authenticated, but in cases where sensitive or high-stakes information is being collected we may need more certainty about the identity of the taker. It's possible to require that users log in via the Harvard's authentication system in order to participate in a survey; this setup does require a few steps, outlined below.

Setting up a survey to require authentication

1. Create (or edit) a survey in Qualtrics, and edit the Survey Flow.
2. Add a new element and choose "Authenticator."
3. Choose the "SSO" authentication type, and set SSO Type to "Use Brand Settings:"



4. Make sure this Authenticator is the first element at the very top of your Survey Flow. If it isn't, be sure to click on "Move" and drag and drop it to the top.
5. Click "Save Flow"
6. When you've finished building your survey, edit the Survey Options and make sure that Survey Protection is set to "Open Access":



7. Next, click on the Distribute Survey tab, and copy the Anonymous Survey Link there. **Note that this is NOT the link you should distribute to users.**
8. Go to the Qualtrics Login Link Generator at bit.ly/qualtricslink and paste your survey URL into the form on that page.
9. The tool will provide you with a special link that you should send to your recipients. For authentication to work, **this is the only link you should distribute.**

Other setup options

Limiting access to a specific list of people

Besides requiring that survey takers log in, you can also require that they appear in an access list before they're allowed to take the survey. To do this, create a panel with the list of your intended respondents. Note: the email addresses in your panel must match the users' official email addresses in the Harvard Directory!

Then, in the Authenticator block in your Survey Flow, choose the "Associate Respondent With Panel" option, identified by first name, last name, and email address (all three are required):

Authentication Type: SSO

Associate Respondent With Panel [Need Help?](#)

My Library: [dropdown] Panel: [dropdown]

Identified By Field(s):

- First Name [dropdown] [-] [+]
- Last Name [dropdown] [-] [+]
- Email [dropdown] [-] [+]

Users who are not in your panel will not be able to take the survey. Note that it's only necessary to set up a panel if you want to limit access to a specific group of people, or if you want to tie other panel attributes to survey responses.

Capturing user attributes from the authentication token

When the user logs in and is redirected to the survey, we pass along some attributes about that user that can be captured in the survey response. The attributes that can be captured are: firstname, lastname, and email.

To capture respondent attributes, edit the Authenticator block in the Survey Flow. Configure as many or as few of these options as you need:

Capture respondent identifying info

ED: firstname	=	firstname	[-] [+]
ED: lastname	=	lastname	[-] [+]
ED: email	=	email	[-] [+]