

Qualtrics – SSO Authenticator in Surveys

The **Single Sign On Authenticator** can limit only USI employees and students to participate in a survey/form and it can allow for certain fields (first name, last name, USI employee or student email, USI employee or student ID, employee phone number, employee department and employee office location) to be pre-populated within the form with certified correct data from Banner. This assists in making forms that need participants to fill in these fields easier to complete as well as verifying data with the university's records. *This will prohibit a survey from displaying if embedded onto a website. Post the link to the survey instead, to allow for USI employees and students to participate.*

Setting up an SSO Authenticator with USI's Shibboleth Settings:

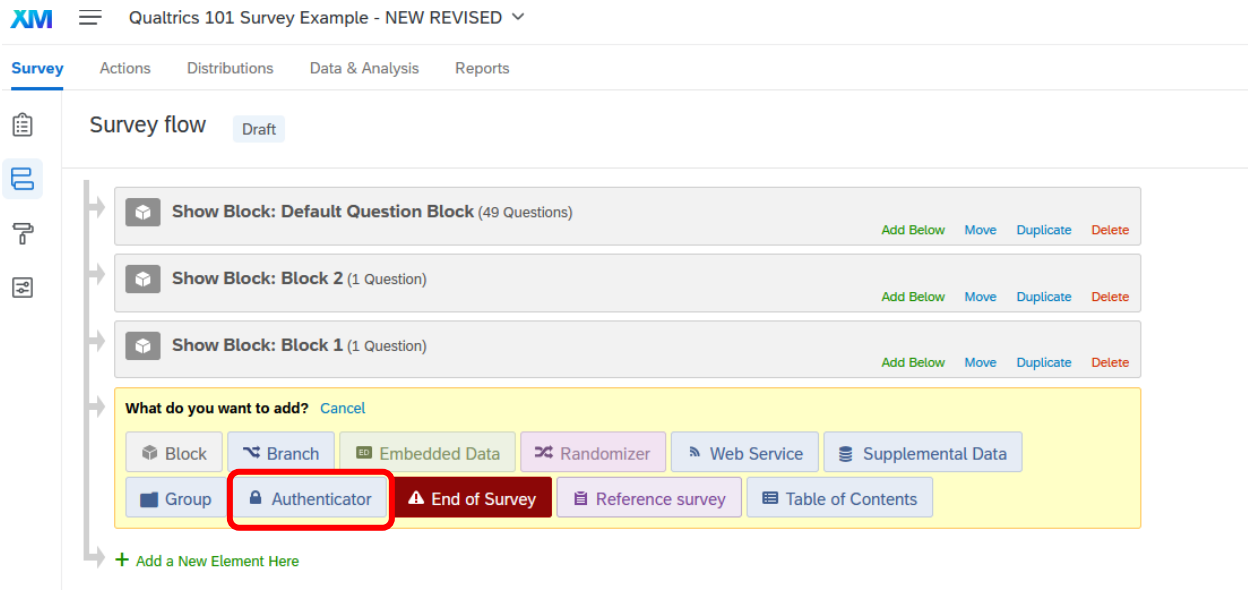
1. Navigate to the Survey tab and open the **Survey Flow**.

The screenshot shows the Qualtrics Survey Editor interface. The 'Survey' tab is selected. On the left sidebar, the 'Question type' icon is highlighted with a red box. The main area shows a question titled 'Qualtrics 101 Survey Example - NEW REVISED'. The question content includes a title 'Qualtrics 101 Survey Example' and a paragraph of text: 'This is a survey example used for the Qualtrics 101 training by Kat Draughon. This training takes about 2 hours and is designed to empower USI employees to use Qualtrics and follow a standard Qualtrics format for USI.'

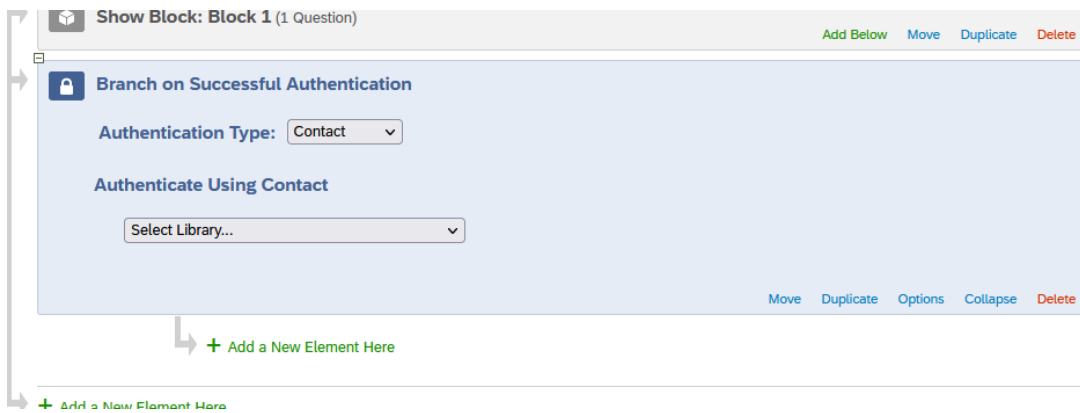
2. Click **Add a New Element Here**.

The screenshot shows the Qualtrics Survey Flow editor. The 'Survey flow' tab is selected. The flow consists of three blocks: 'Show Block: Default Question Block (49 Questions)', 'Show Block: Block 2 (1 Question)', and 'Show Block: Block 1 (1 Question)'. At the bottom of the flow, there is a green button labeled '+ Add a New Element Here' which is highlighted with a red box.

3. Select Authenticator.



The screen will look like this



4.

- Change **Authentication Type** to **SSO**,
- **Uncheck Associate Respondent with Panel**
- **Check** Capture respondent identifying infoChange SSO Type to **Shibboleth**

Branch on Successful Authentication

Authentication Type: SSO

Associate Respondent With Panel

Select Library...

Capture respondent identifying info

SSO Type: Token

Encryption Method: 3DES

Mac Method: md5

Leeway: 300 Seconds

Key: [Generate Key](#)

[Generate Test Token](#) Note: You must save the survey flow before using the generated token.

This SSO type may not function properly with Preview Survey.

[Move](#) [Duplicate](#) [Options](#) [Collapse](#) [Delete](#)

[+ Add a New Element Here](#)

Screen should now look like this, then click on Add Embedded Data

Branch on Successful Authentication

Authentication Type: SSO

Associate Respondent With Panel

Capture respondent identifying info

[Add Embedded Data...](#)

SSO Type: Shibboleth

This will use the organization's current Shibboleth settings.

This SSO type may not function properly with Preview Survey.

[Move](#) [Duplicate](#) [Options](#) [Collapse](#) [Delete](#)

[+ Add a New Element Here](#)

Branch on Successful Authentication

Authentication Type: SSO

Associate Respondent With Panel

Capture respondent identifying info

Embedded Data to Set... = Field From SSO

SSO Type: Shibboleth

This will use the organization's current Shibboleth settings.

This SSO type may not function properly with Preview Survey.

[Move](#) [Duplicate](#) [Options](#) [Collapse](#) [Delete](#)

[+ Add a New Element Here](#)

5. Enter your **Embedded Data field names** into the “Embedded Data to Set” text entry box on the left of the equals sign and insert the formal or friendly names of the attributes that are being passed via SAML into the “Field From SSO” text entry box (you can click the plus sign to add additional fields).

Note:

- The fields highlighted in yellow are the ONLY fields available to use. Do not try to make up other variables.
- Enter the fields in yellow **EXACTLY** as show (i.e. pay attention to capitalization – the n in firstName and lastName is capitalized, etc.) or they will not work.
- employeeID is also the student id – but you must enter employeeID
- You do not need to enter or use all these fields. Just enter the ones you need for your survey.
- The fields on the left can be anything you want, but no spaces or dashes.

6. Move the Authenticator Block to the VERY TOP of the survey. It must be the first thing that the respondent completes to bring in these fields.

- Click and drag “Move” to make the block the first one of the survey. Drop it when you get to the top, and it has moved.

Branch on Successful Authentication

Authentication Type: SSO

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

Capture respondent identifying info

SSO Type: Shibboleth

This will use the organization's current Shibboleth settings.

This SSO type may not function properly with Preview Survey.

Move Duplicate Options Collapse Delete

Drag and Drop to the desired location.

Select “**Save Flow**” to complete.

Branch on Successful Authentication

Authentication Type:

Associate Respondent With Panel

Capture respondent identifying info

<input type="text" value="First_Name"/>	=	<input type="text" value="firstName"/>	<input type="button" value="-"/>	<input type="button" value="+"/>
<input type="text" value="Last_Name"/>	=	<input type="text" value="lastName"/>	<input type="button" value="-"/>	<input type="button" value="+"/>
<input type="text" value="USI_ID"/>	=	<input type="text" value="employeeID"/>	<input type="button" value="-"/>	<input type="button" value="+"/>
<input type="text" value="USI_Email"/>	=	<input type="text" value="email"/>	<input type="button" value="-"/>	<input type="button" value="+"/>
<input type="text" value="USI_Office_Phone"/>	=	<input type="text" value="phone"/>	<input type="button" value="-"/>	<input type="button" value="+"/>
<input type="text" value="USI_Department"/>	=	<input type="text" value="department"/>	<input type="button" value="-"/>	<input type="button" value="+"/>
<input type="text" value="USI_Office_Location"/>	=	<input type="text" value="officeLocation"/>	<input type="button" value="-"/>	<input type="button" value="+"/>

SSO Type:

This will use the organization's current Shibboleth settings.

*Note: **USI_Department(department)** will populate an employee’s primary department OR a student’s primary academic department from their first major (not their USI job – if applicable). **USI_Office_Phone(phone)** and **USI_Office_Location(officeLocation)** may only be populated for employees. The field **employeeID (USI_ID)** works for all USI employees, students, and student workers (everyone).

7. To allow for the survey taker to confirm their information, you may make a **Text Entry – Form** type question.

The screenshot displays a survey editor interface. At the top, there are navigation tabs: Survey, Actions, Distributions, Data & Analysis, and Reports. Below the Survey tab, there is a 'Form field' dropdown menu, a 'Tools' dropdown, and a 'Saved at 8:54 AM Draft' status indicator.

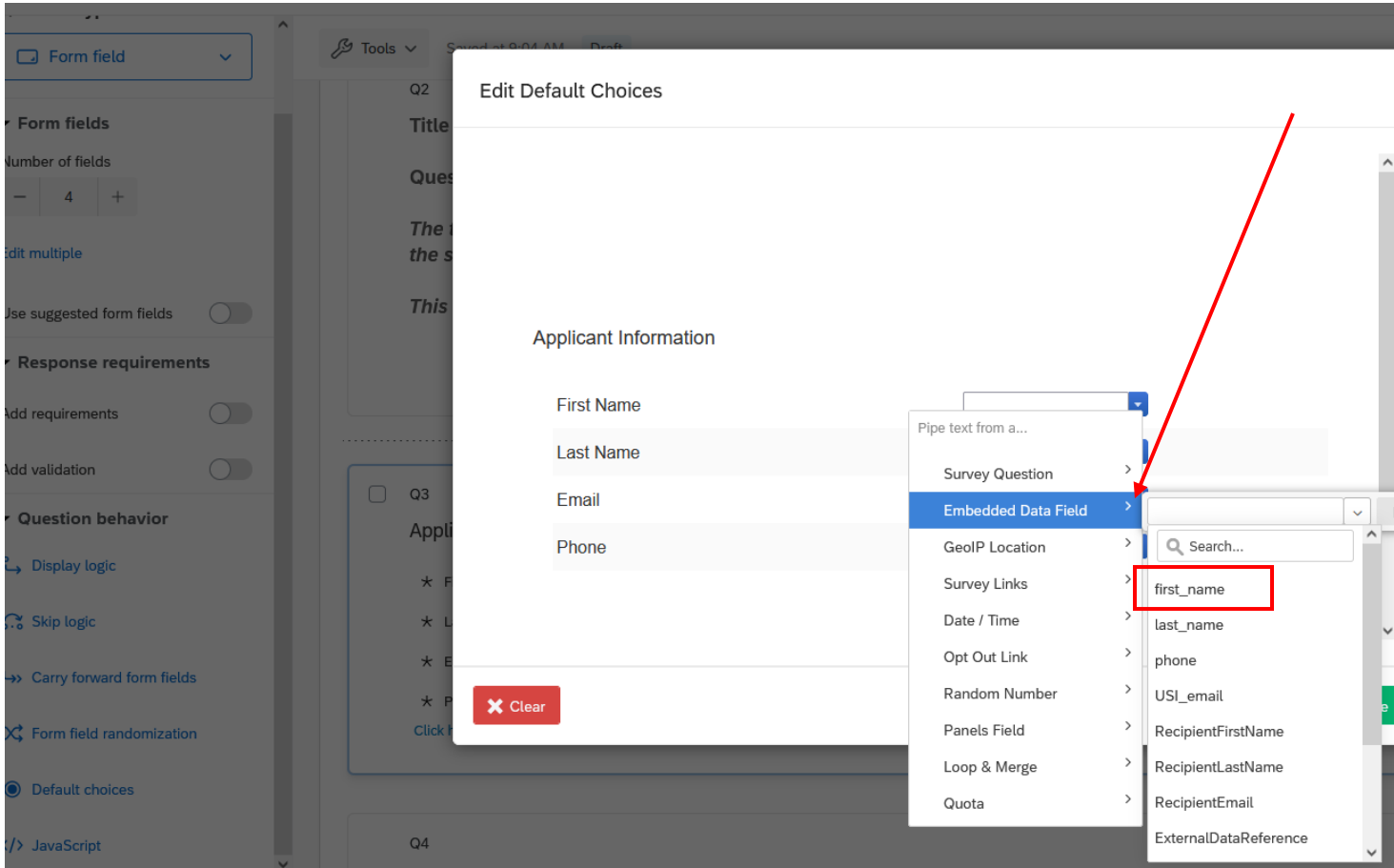
The left sidebar contains several configuration sections:

- Form fields:** Includes a 'Number of fields' control set to 4, an 'Edit multiple' link, and a 'Use suggested form fields' toggle switch.
- Response requirements:** Includes 'Add requirements' and 'Add validation' toggle switches.
- Question behavior:** Includes 'Display logic', 'Skip logic', 'Carry forward form fields', 'Form field randomization', and 'Default choices' (highlighted with a red box).
- JavaScript:** A section for adding custom code.

The main preview area shows two questions:

- Q3 Applicant Information:** A form with four required text entry fields: First Name, Last Name, Email, and Phone. A link 'Click here to edit form fields' is present below the fields.
- Q4 Address:** A form with five required text entry fields: Street, City, State, and Zip Code.

8. Select **“Default Choices...”** and click the down arrow on the form field to select the corresponding embedded data fields (First_Name, Last_Name, USI_Email, USI_Office_Phone etc.) you want automatically piped in.



The screen will look something like this, then click save.

Applicant Information

First Name	<input type="text" value="{e://Field/first_name}"/>
Last Name	<input type="text" value="{e://Field/last_name}"/>
Email	<input type="text" value="{e://Field/USI_email}"/>
Phone	<input type="text" value="{e://Field/phone}"/>

What the respondent will see:

Applicant Information

First Name	<input type="text" value="Katherine"/>
Last Name	<input type="text" value="Draughon"/>
Email	<input type="text" value="kdraughon@usi.edu"/>
Phone	<input type="text" value="812-465-1630"/>

Remember – this only works for current USI employees and enrolled students. If the respondent needs to make changes, they can type over the information pre-populated.