

Setting Qualtrics Up for PennKey Authentication

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Wharton's Qualtrics is now enabled for **SSO authentication**. This means not only that you can use PennKey to log into the Qualtrics application, but also that you can require survey respondents to log in using PennKey. This article outlines how to set that up.

Before You Start

You will need the following before you can complete this task:

- Wharton Qualtrics Account
- Edit access to the survey you want to add authentication to.
- Familiarity with "Survey Flow" options in Qualtrics.

Table of Contents

- [Adding Basic PennKey SSO Authentication](#)
- [Adding PennKey SSO Authentication with Respondent Info](#)
- [Adding PennKey SSO Authentication with Panel Association](#)
- [Advanced Authentication Options](#)
- [Testing your Survey](#)
- [Questions?](#)

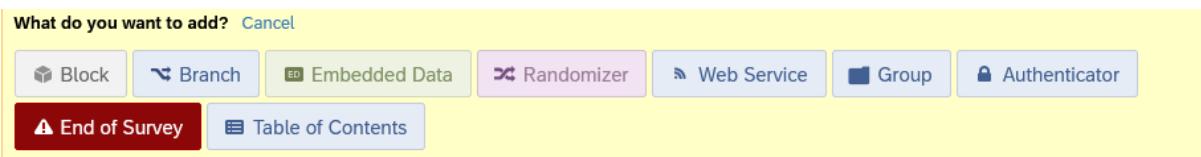
Adding Basic PennKey SSO Authentication

To add authentication, you'll need to use the **Survey Flow options** in Qualtrics.

1. Open your survey for editing.
2. In the Survey Flow, **add a new element** above the section that you want to be authenticated. All sections that you want included in authentication must be **indented** below this element.

The image contains two screenshots of the Qualtrics Survey Flow editor. Both screenshots show a 'Branch on Successful Authentication' block with the 'Authentication Type' set to 'SSO'. The left screenshot shows a 'Show Block: Default Question Block (1 Question)' element indented under the authentication block, with a green checkmark indicating it is correctly configured. The right screenshot shows the same element but is not indented, with a red X indicating it is incorrectly configured.

3. Choose **Authenticator** as the Type of Element.

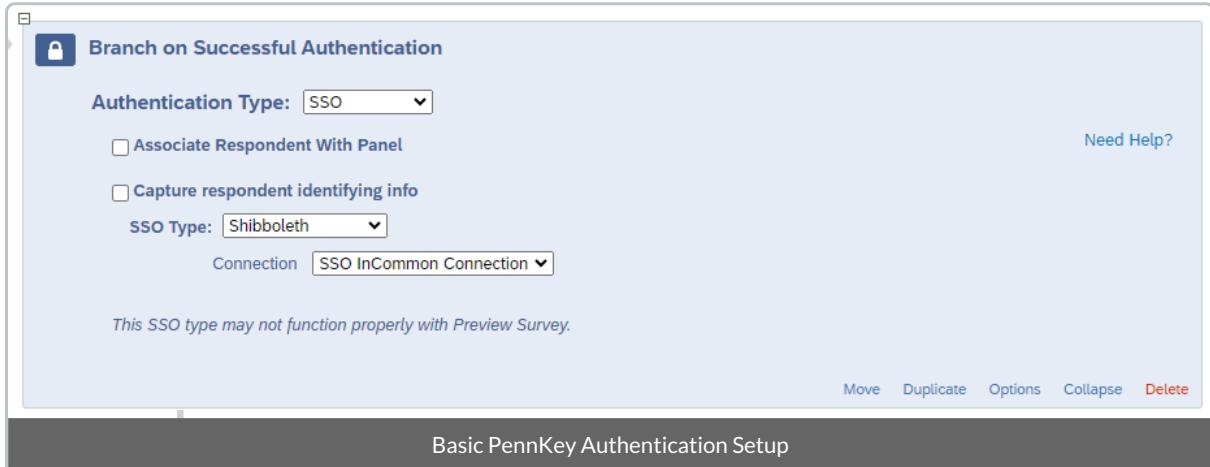


4. Settings should be as follows:

Authentication Type = SSO

SSO Type = Shibboleth

Connection = SSO InCommon Connection



[^Top](#)

Adding PennKey SSO Authentication with Respondent Info

Certain information about your respondents is stored along with PennKey Authentication. This data includes name and email address, among others. Rather than prompt respondents to enter any of these fields, you can include them automatically by following these instructions:

1. Follow the instructions for adding basic PennKey SSO Authentication.
2. Update the Authenticator settings by checking **Capture respondent identifying info** and adding any option as shown. Entries are case-sensitive.

Branch on Successful Authentication

Authentication Type: SSO

Associate Respondent With Panel

Capture respondent identifying info

This SSO type may not function properly with Preview Survey.

SSO Type: Shibboleth

Connection: SSO InCommon Connection

Move Duplicate Options Collapse Delete

PennKey Authentication Setup with Respondent Info

The screenshot shows a configuration dialog for PennKey authentication. It includes sections for 'Authentication Type' (SSO), 'Capture respondent identifying info' (checked), 'SSO Type' (Shibboleth), and 'Connection' (SSO InCommon Connection). Below these are seven field mappings: 'eduPersonPrincipalName' to 'eduPersonPrincipalName', 'sn' to 'sn', 'givenName' to 'givenName', 'displayName' to 'displayName', 'mail' to 'mail', 'eduPersonAffiliation' to 'eduPersonAffiliation', and 'eduPersonScopedAffiliation' to 'eduPersonScopedAffiliation'. Each mapping has a red minus sign and a green plus sign icon. At the bottom, there's a note about the SSO type not functioning properly with Preview Survey, and standard navigation buttons (Move, Duplicate, Options, Collapse, Delete).

The above identifying information will be available in your survey as **embedded data**. If you prefer, you can rename the fields by changing the values on the left-hand side, for example:

Changing Embedded Data field names

The screenshot shows a dialog titled "Changing Embedded Data field names". It contains two field mappings: 'LastName' to 'sn' and 'FirstName' to 'givenName'. Each mapping has a red minus sign and a green plus sign icon.

You can read more about the definitions of these fields at [EDUCAUSE](#).

Adding PennKey SSO Authentication with Panel Association

[^Top](#)

You can further restrict access to your survey by pre-selecting authorized Penn-affiliated respondents and saving them in a **Qualtrics Contact List** (a.k.a. Panel). You can also prefill other known information, for example, graduation year.

1. Follow the instructions above for adding basic PennKey SSO Authentication .
2. Optionally, capture respondent identifying info.
3. Create a contact list containing PennID (pennkey@upenn.edu) in the **ExternalDataReference** column and any other data you wish to include in additional columns.
4. Update the Authenticator settings by checking **Associate Respondent with Panel**, selecting your Contact List, and chose External Data Reference under **Identified By Fields(s)**.

Branch on Successful Authentication

Authentication Type: SSO

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

Group Library: Wharton Behavioral Lab | WBL Experimenters 2023

Identified By Field(s):

External Data Reference

Capture respondent identifying info

ED eduPersonPrincipalName	=	eduPersonPrincipalName	
ED sn	=	sn	
ED givenName	=	givenName	
ED displayName	=	displayName	
ED mail	=	mail	
ED eduPersonAffiliation	=	eduPersonAffiliation	
ED eduPersonScopedAffiliation	=	eduPersonScopedAffiliation	

SSO Type: Shibboleth

Connection SSO InCommon Connection

This SSO type may not function properly with Preview Survey.

Move Duplicate Options Collapse Delete

PennKey Authentication Setup with Panel Association

Advanced Authentication Options

[^Top](#)

Click on **Options** to see what **authentication options** are available. Most importantly, select whether you want to permit respondents to be able to complete the authenticated section more than once. You may also want to reload any previously saved progress for a returning respondent.

Testing your Survey

[^Top](#)

Especially when using panel associations, we highly recommend that you thoroughly test. You can create test contact lists to simulate both successful and unsuccessful authorization using your own PennKey (invite colleagues to help you test, too). Make sure to change back to the "real" contact list before distributing your published survey.

Questions?

[^Top](#)

Contact your **Wharton Computing Representative** for help with this feature of Qualtrics.