CUHK Qualtrics SSO setup guide

Last Modified on 10/07/2025 11:38 am HKT

- 1. Go to the survey form you wanted to edit and click "Survey flow"
- 2. Click "Add a New Element Here" or "Add Below"



3. Select "Authenticator"

Survey	V	/orkflows	Distributions Data & Analysis Reports	
٢	Sur	vey flow	Draft	
	+	Add Below Move Duplicate Delete		
٩	÷	What do you	vant to add? Cancel	
		Block	S Branch ■ Emb Data S Randomizer S Web S	ervice 🔹 Text Sentiment - Topic
		Group	Authenticator A End of Survey	

4. Change "Authentication Type" to SSO and "SSO Type" to "Shibboleth"

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Ì	Survey flow Draft				
2	Show Block: Default Question Block (1 Question)	Ad	ld Below Mov	e Duplicate	Delete
ij	Branch on Successful Authentication Authentication Type: SSO 4 Associate Respondent With Panel 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.			Need	Help?
	+ Add a New Element Hare	Move Du	plicate Optio	ns Collapse	Delete

5. Click and hold the "Move" button of your question block and drag the block under the authenticator

6. (Optional, capture email from SSO) Enable **"Capture respondent identifying info" and add the field "mail"** to capture the email address of respondent from SSO. The captured data can then be viewed in the response data.

Authentication	on Type: SSO			Need Help?	
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SSO Type:	Connection cuhk authenticator V				
This SSO typ	e may not function properly with Pre	view Survey.			
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7. Click "Apply" to complete the setup

Survey flow Draft

- 8. Please note that you will need to "Publish" your survey form to test/update the SSO related settings, and it may take ~5 minutes for the survey form to be updated.
- 9. For further details, you may refer to https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/advanced-elements/authenticator/sso-authenticator/#Shibboleth

(Additional) To set up a contact list for allowing certain CUHK participants to access the survey only

- a. Setup Contact list in Qualtrics:
 - 1. Go to "Directories" at the menu bar

XI		=	Default Directory	
Segn	nen	씁	Home	utions
G	Se	(j)	Projects	
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	1		Library	
			Survey Director	

2. Click "Create a list"

XM = Defa	ault Directory					C) 🗘 🛯 🖽
Segments & lists	Transactions Distributions						
C Segments	i≣ All lists	Lists					
D Lists	Shared folders	Use lists to distribute survey invitations, and target web a	and mobile feedback to fixed p	groups of people.			
& Samples	Testing for library	Q Search name					Create a list
		List	Last modified	Contacts	Samples	Created by	
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		20250310testing	03/10/2025, 12:14:28 PM	1		You	•••

3. Enter the new contact list name and click "Confirm"

	09/11/2024, 03:41:25 PM	
10	Create a list	×
	Create a list of contacts who will receive specific surveys and distributions List name	
	 ist to fill survey test You can now create lists that contain private data. Reach out to your directory admin to enable this feature. Learn more about private data in lists 	
II.	Cancel Confirm	n

4. Choose a method for entering the contact information of individuals who should receive and complete the survey



- a. File upload: You can upload a contact list by downloading and filling out a template Excel file provided by Qualtrics. Once completed, import the file into Qualtrics to add your contacts. For details, please refer to the Qualtrics guideline: https://www.qualtrics.com/support/iq-directory/lists-tab/creating-mailing-lists/#UploadaFile?
- Manual input: You can manually enter contact information directly into a table provided by Qualtrics. This method is useful for adding a small number of contacts without using a file.
 For details, please refer to the Qualtrics guideline:
- c. https://www.qualtrics.com/support/iq-directory/lists-tab/creating-mailing-lists/#ManualInput
- 5. Please ensure that each contact's email address is entered correctly and is a valid CUHK email address. This email will be used to match the user's identity after they log in via CUHK OnePass.
- 6. For further details on setting up the contact list, you may also refer to the Qualtrics guideline: https://www.qualtrics.com/support/iq-directory/lists-tab/creating-mailing-lists/#About

b. Survey flow setup:

 Go back to the "Survey flow" page of the survey that you would like to edit (Top left menu > Projects > Select the project > Survey flow)



- + Add a New Element Here
- 2. Enable "Associate Respondent With Panel"
- 3. Select the contact list that you created in part a
- 4. Under "Identified By Field(s):", select "Email"



- 5. Click "Apply" to complete the setup
- 6. Please note that you will need to "Publish" your survey form in order to test the SSO related features.
- 7. For further details, you may refer to the section **"ASSOCIATE RESPONDENT WITH CONTACT LIST**" in the following link: https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/advanced-elements/authenticator/sso-authenticator/#Shibboleth