Linking MTurk and CloudResearch Accounts:

A Users' Guide

Overview

Mechanical Turk and CloudResearch are independent companies with completely separate platforms. In order for the studies you set-up on CloudResearch to be launched and run on MTurk's platform, you need to follow a few steps that are rather technical, but can be easily completed within ten to fifteen minutes. We've created this guide to walk you through the process and, hopefully, make things easy.

The first step in creating an MTurk account, creating an AWS account.

1. **Go to the Amazon Mechanical Turk Developer page to create your Amazon Web Services (AWS) account.**

   This web page lists the 4 steps you will need to take to set up your MTurk account. For each step listed in the following instructions, you will keep coming back to this web page to complete the set up in its entirety.

   Click the **Create an AWS Account** button to begin the process

of creating your MTurk account. Although your AWS account allows you to use AWS services with fees, you should not incur any AWS fees for setting up MTurk studies.

On the first page, enter your personal information and then press **continue**.

On the second page, you will be asked to enter credit card information. Amazon requires a credit or debit card on file in order to cover charges that an AWS user might regularly incur (e.g., computing charges, database storage charges). As mentioned above, however, you should never incur charges from AWS simply for setting up and launching studies on MTurk.

After you enter your credit card information, you may be asked to complete a two-step verification process in which Amazon will call you and ask you to enter a PIN provided on your computer screen.

After the verification process, you will be asked to select an AWS plan. Select the **Basic Plan**—it's the free option. After selecting a plan, you are done with Step 1.

Payment Information

Please type your payment information so we can verify your identity. We will not charge you unless your usage exceeds the AWS Free Tier Limits. Review frequently asked questions for more information.

Credit/Debit card number

Expiration date

10 ▲▼   2018 ▲▼

Cardholder's name

Billing address

◉ Use my contact address
65-30 Kissena Blvd
CEP Hall 2
Flushing, NY 11367

Select a Support Plan

AWS offers a selection of support plans to meet your needs. Choose the support plan that best aligns with your AWS usage. Learn more

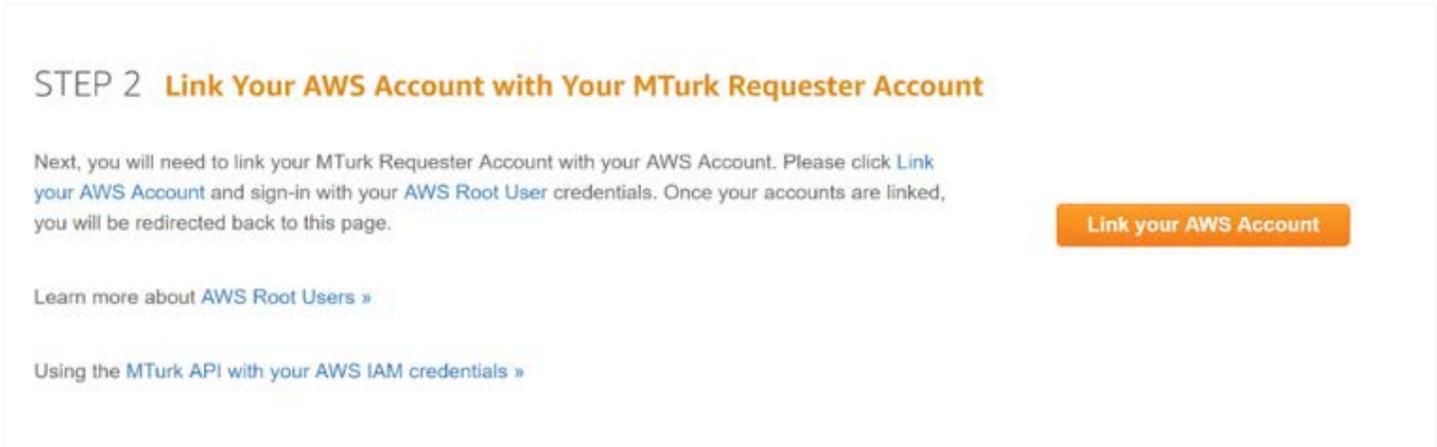| Basic Plan	Developer Plan	Business Plan
Free	From $29/month	From $100/month
• Included with all accounts	• For early adoption, testing and development	• For production workloads & business-critical dependencies
• 24/7 self-service access to forums and resources	• Email access to AWS Support during business hours	• 24/7 chat, phone, and email access to AWS Support
• Best practice checks to help improve security and performance	• 1 primary contact can open an unlimited number of support cases	• Unlimited contacts can open an unlimited number of support cases
• Access to health status and notifications	• 12-hour response time for nonproduction systems	• 1-hour response time for production systems

Need Enterprise level support?
Contact your account manager for additional information on running business and mission critical-workloads on AWS (starting at $15,000/month). Learn more

Select the **Basic Plan** in order to use Mechanical Turk free of AWS charges.

2. Link your AWS account with your MTurk Requester account.

Return to the Amazon Mechanical Turk Developer page and complete **Step 2: Link Your AWS account with Your MTurk Requester Account,** by clicking **Link your AWS Account** button. You will be asked to login with your AWS login information.

After you log in, select the option to **Link This Account**. If your AWS and MTurk Requester accounts were successfully linked, you will see a message on the next page saying so. You are done with Step 2.

From the MTurk Developer page, click **Link your AWS Account**.
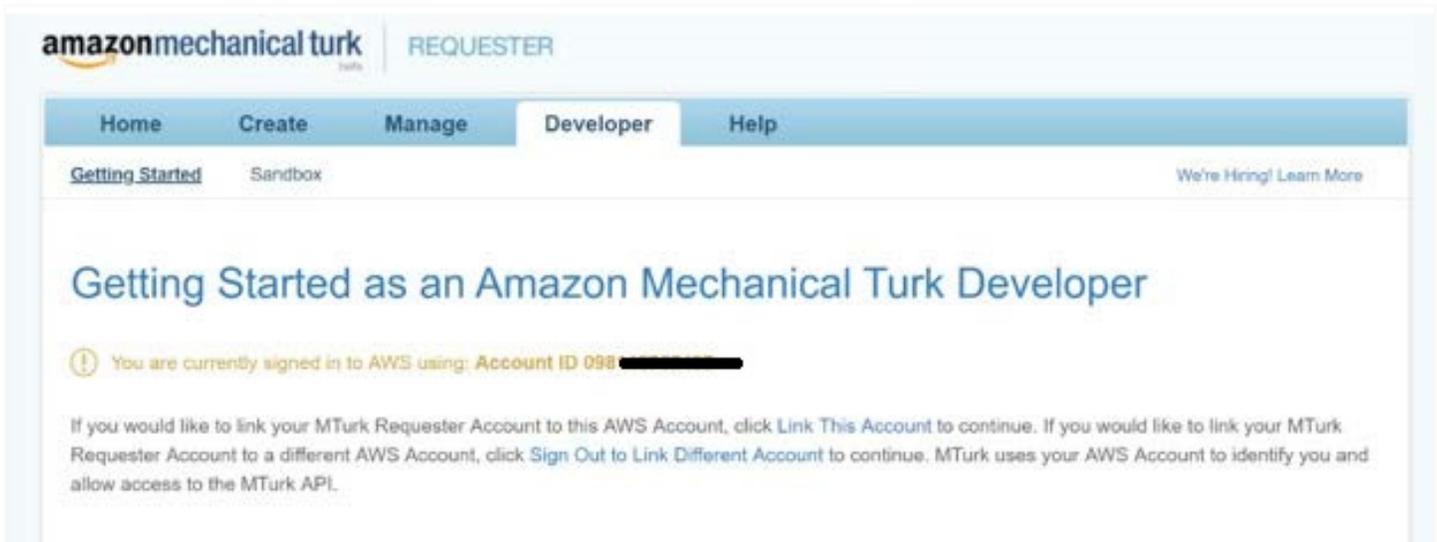
After logging in with your AWS credentials, click **Link This Account**.
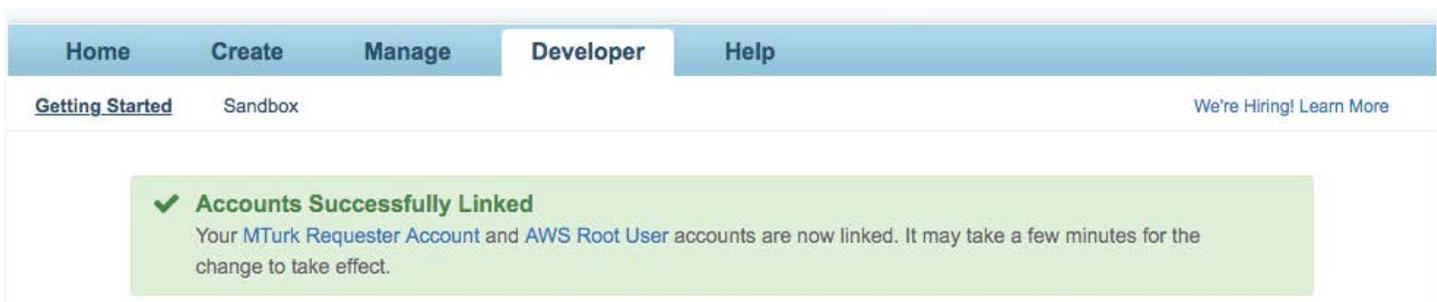
After successfully linking your AWS and MTurk Requester accounts you should see this message.

### 3. Register for the MTurk Developer Sandbox mode.

Sandbox mode allows you to develop studies in test mode without actually launching them.

At this point, Amazon will direct you to the Developer page so you can proceed to step 3. Click **Register for the Requester Sandbox** button. You will be asked to login again with your credentials. After logging in, enter your contact information (you can select the information you already put in or enter new information). Once you click **continue** at the bottom of the page, you will be registered for the MTurk Sandbox.

4. Create an Identity and Access Management (IAM) user and give this user permission to access the MTurk API from your account.

This simply helps your account communicate with MTurk. To create the IAM user follow the steps below.

a. Go to https://console.aws.amazon.com/iam/home?#/users and sign in using your login credentials.

b. From the dashboard, choose **Add user.**

c. On the following page, enter a user name into the user name box.

d. Below the **Select AWS access type** section, select **programmatic access**.

e. Choose **Next Permissions** to move to the next page.
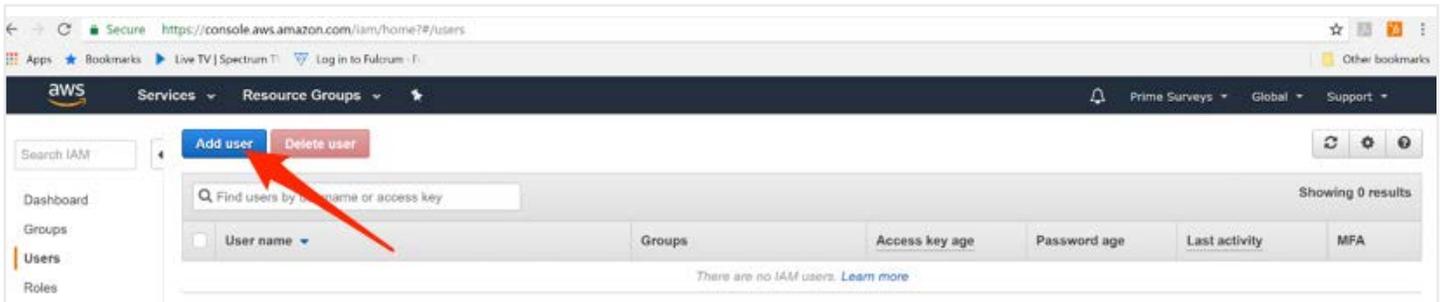
From the dashboard, select **Add user.**
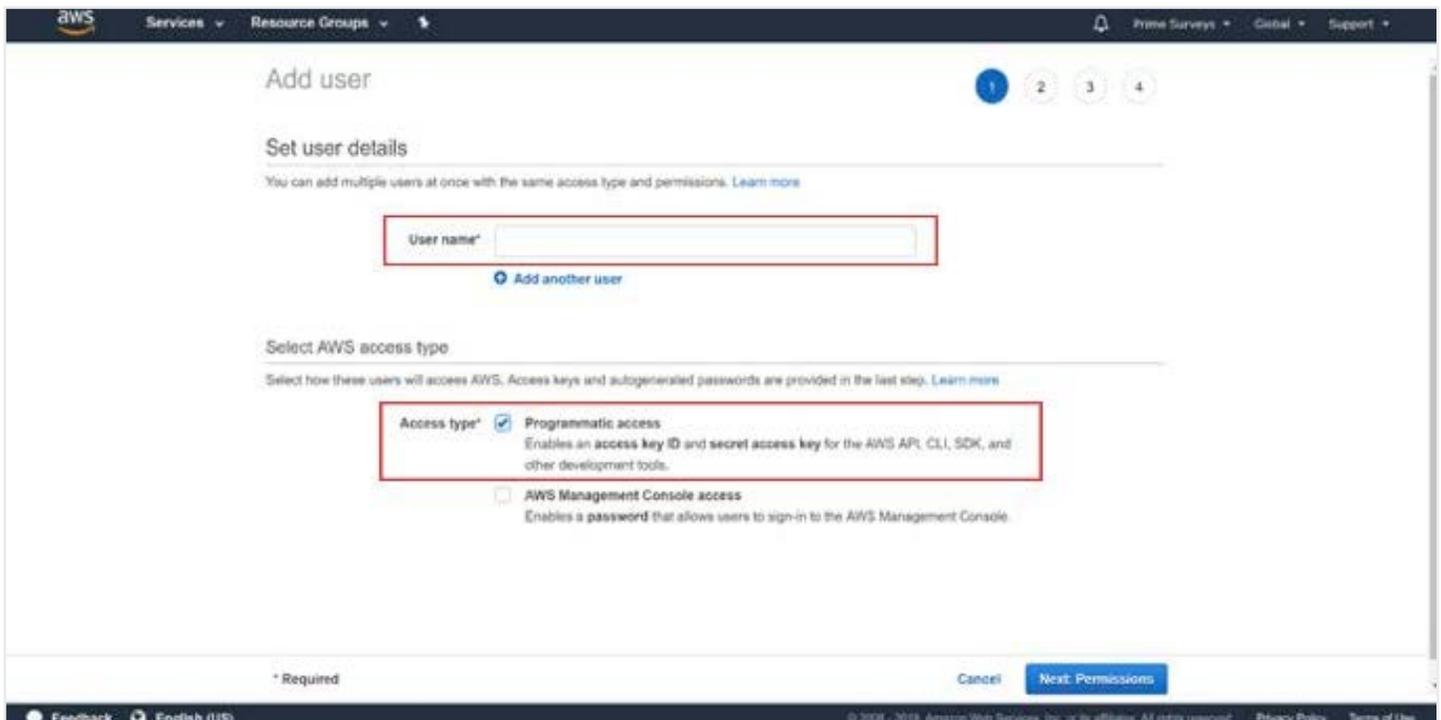
Enter a username into the User name box. Then, select **Programmatic access** next to Access type. Finally, select **Next Permissions** to move to the next page.

Now, that you have an IAM user, you need to grant the user permission to communicate with the MTurk API. To do this, follow the steps below.
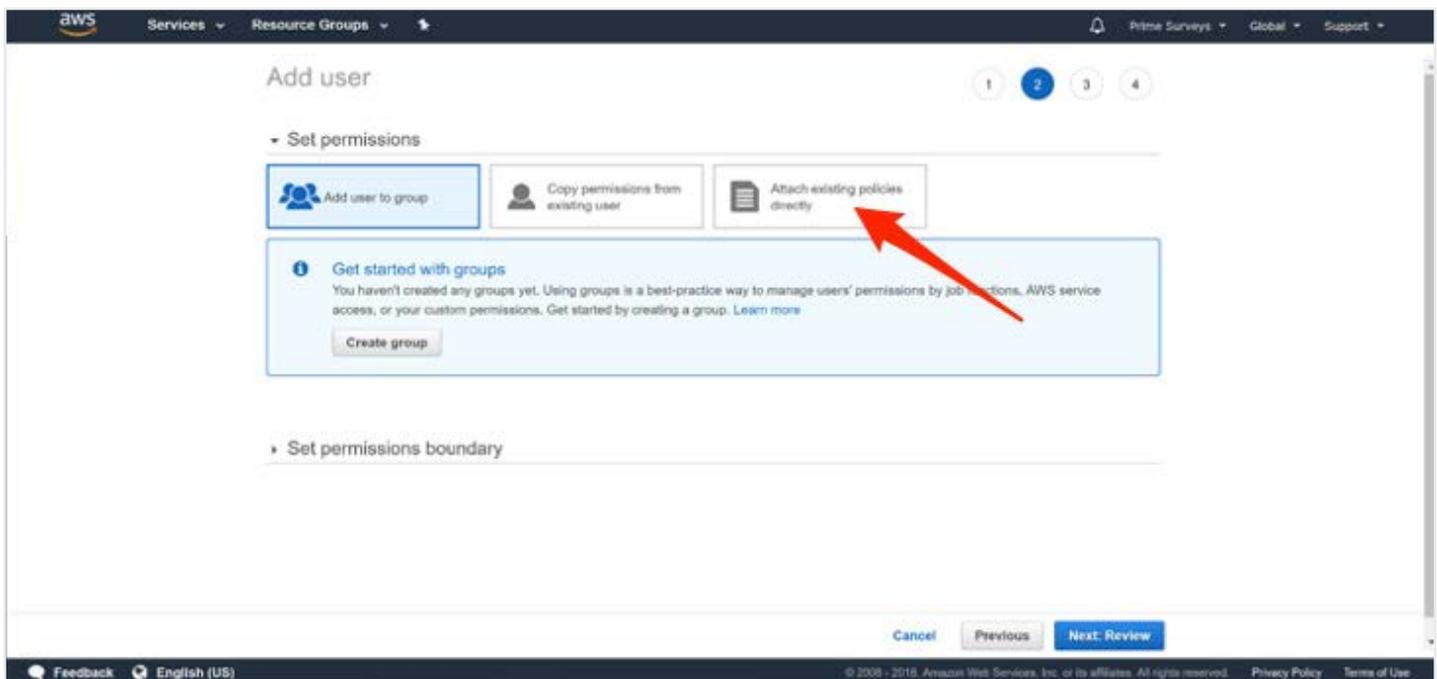
f. Select **Attach existing policies directly**.

g. Once the page loads, you will see a long list of "policies" that you can add to your IAM user. You need to check the policy named **AmazonMechanicalTurkFullAcces**s. The easiest way to find this policy is to use the search bar.

h. Once you've selected the **AmazonMechanicalTurkFullAccess** policy, select **Next: Review**.

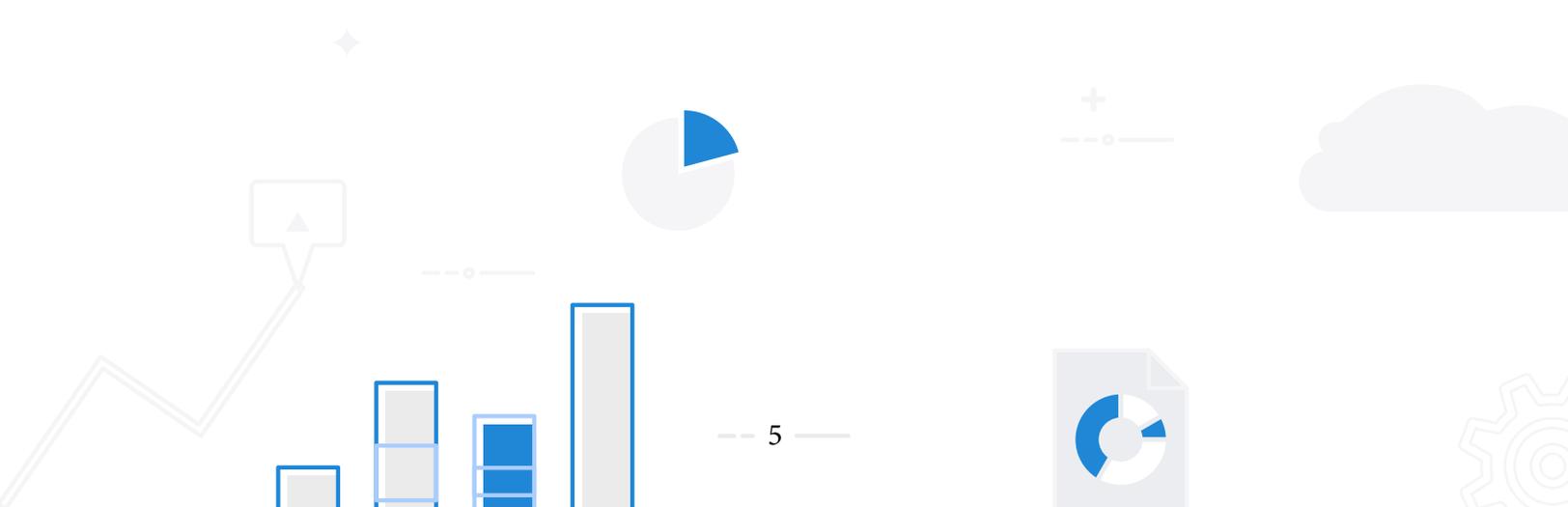i. Review the information and then select **Create user**.

IMPORTANT:

After creating your user, you should see a webpage that says **Success** and displays your Access Key ID and Secret Access Key. In order for your CloudResearch account to access your MTurk account, you need the Access Key ID and Secret Access Key. This webpage is the only time you will ever be displayed with this information, so it's vital that you save it somewhere safe. To save your credentials follow the steps below.

j. Choose **Download .csv**

k. Your browser will automatically download a file titled **credentials.csv** You should save this file in a safe place.

l. Return to the AWS page and logout.

Select **Attach existing policies directly** in order to give your IAM user permission to access the MTurk API. Use the search bar to find the **AmazonMechanicalTurkFullAccess** policy. Once you find it, check the box to grant permission. Then select **Next: Review**.
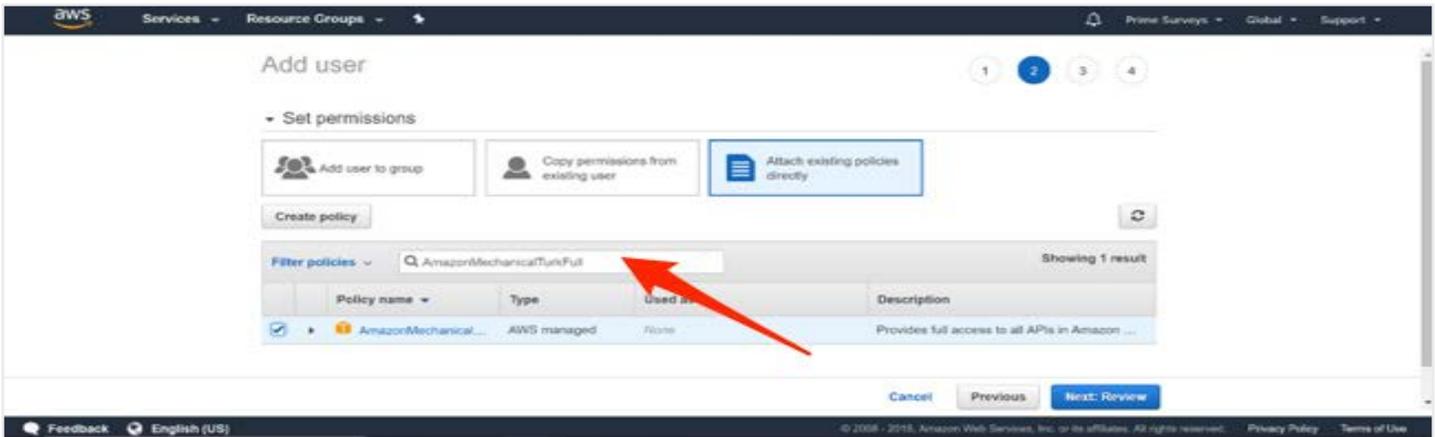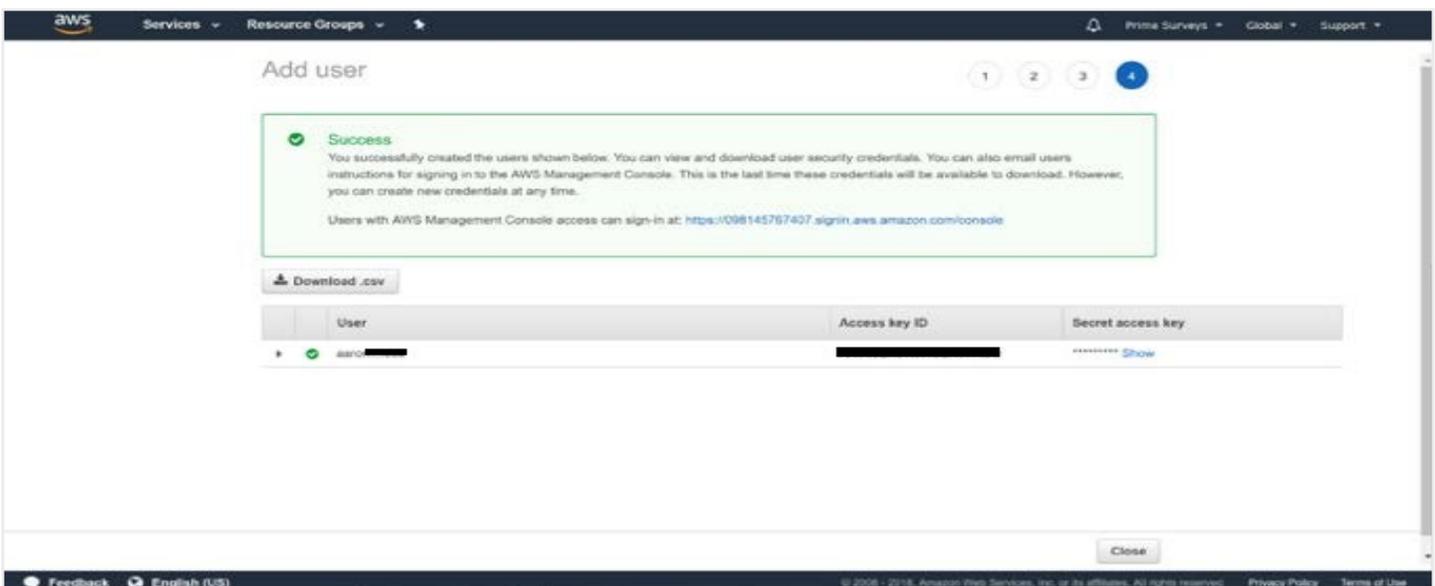
Use the search bar to find the **AmazonMechanicalTurkFullAccess** policy. Once you find it, check the box to grant permission. Then select "**Next: Review**.
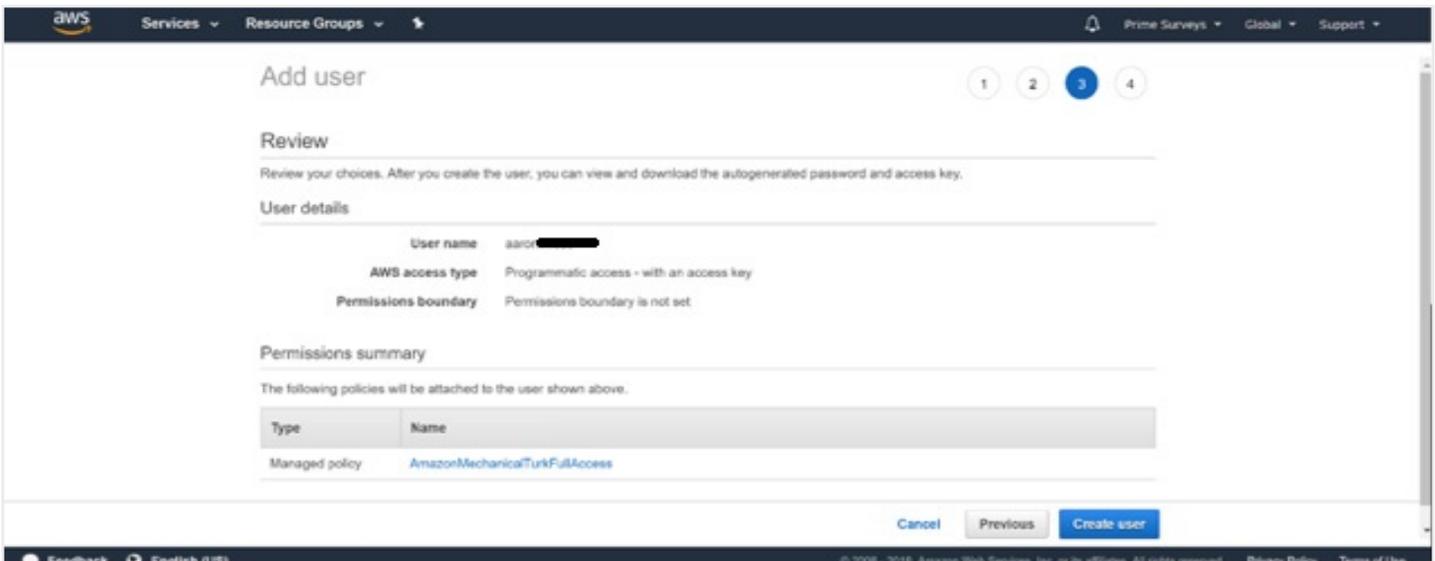
Review the information on this page and then select **Create user**.


If successful, you should see a **Success** message along with information about your Access Key ID and Secret access key credentials. You need these credentials to connect CloudResearch with MTurk and this is the only time they will be displayed to you. Make sure you save them somewhere safe.

5. Link your **CloudResearch** account with your MTurk account.

a. Log into CloudResearch using your CloudResearch credentials.

b. In the upper right corner, hover over the user icon and in the dropdown list select **Link Mechanical Turk.**

c. Scroll to the bottom of the page and enter your Access Key ID and Secret Access Key into the empty boxes. Then, click **Submit.**

d. If you were successful, you should see a **Success** message. Your accounts are now linked!
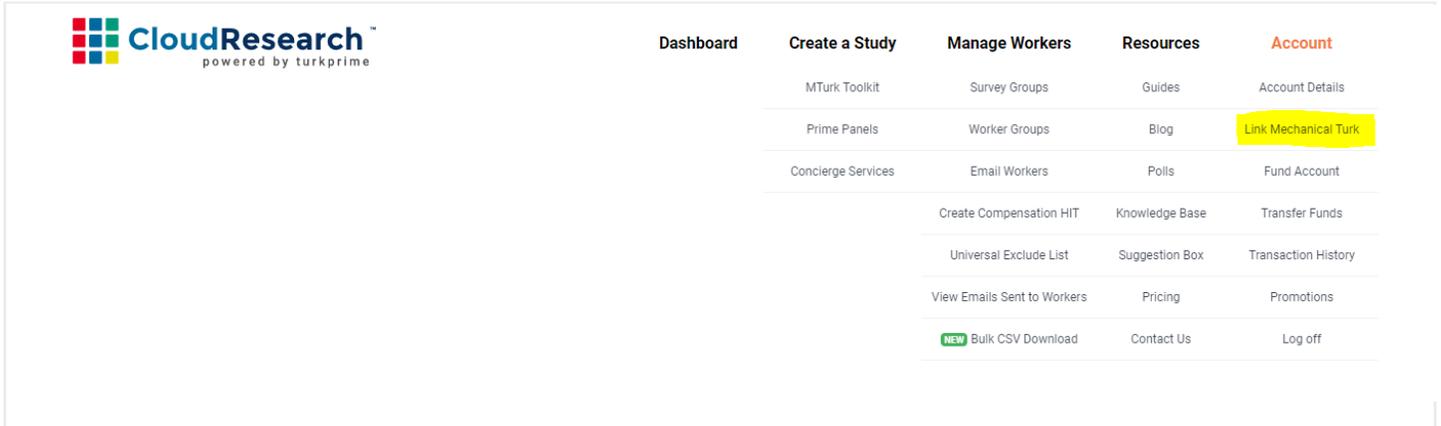
In the upper right corner of the CloudResearch homepage, hover over the user icon and in the dropdown menu select **Link Mechanical Turk**.

Enter your **Access Key ID** and **Secret Access Key** into the empty boxes—to avoid typing errors, you may copy and paste the access key— and then click **Submit.** Your accounts should now be linked.