Qualtrics Survey: Automating respondent information with ONYEN authentication

Using the following directions, you will set-up a UNC ONYEN log-in screen at the beginning of your Qualtrics survey. After logging-in, the respondent's information will automatically be displayed and associated with the survey. You have the option to make the information fixed or editable by the respondent.



Respondent's info automatically shown



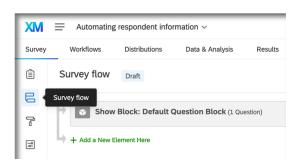
THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

Name: MattOsment Email: matto@email.unc.edu ONYEN: matto Department: Arts and Sci Information Svcs

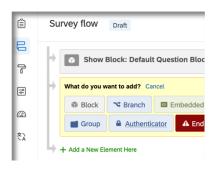
STEP 1: Set-up the authenticator

This step will require the survey respondent to log-in with an onyen and password. The respondent's corresponding information will be captured from the UNC database.

In your survey, go to Survey Flow



Click +Add a New Element Here and select Authenticator



Move the **Default Question Block** below the **Authenticator Block**

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Ê	Survey flow Draft	
	Show Block: Default Question Block (1 Question)	Add Berry Move Dublicate Delete
٩	Branch on Successful Authentication	

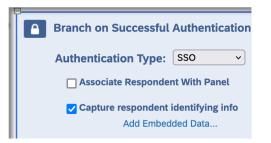
To this:

Branch on Successful Authentication		
Authentication Type: Contact		
Authenticate Using Contact		
Select Library 👻		
	Move	Dupli
	MOVE	Dupa
Show Block: Default Question Block (12 Questions)		
+ Add a New Element Here		

Set the Authentication Type to SSO

Uncheck **Associate Respondent with Panel** (you may wish to keep this active, but it is not needed for the purpose at hand)

Check Capture respondent identifying info



Click Add Embedded Data... and add the following fields:

		_		
Capture r	espondent identifying info			
	🗉 uid]=	uid	••
	ist name] =	firstname	••
	📧 last name] =	lastname	••
	📧 email] =	mail	••
	department] =	ou	••
	🔟 Pid] =	pid	••

Note:

- ONYEN is UID
- Department is ou
- Pid is pid
- The order does not matter
- You may capture more information than you think you will need. For example, you may or may not wish to use the PID, but you can still capture it for potential use later.

Set the SSO Type to Shibboleth

Connection: unc authenticator

Click **Apply** in the bottom left to save your changes

SSO Type: Shibboleth Connection unc authenticator This SSO type may not function properly with Preview Survey.	•				
	Move	Duplicate	Options	Collapse	C
Show Block: Default Question Block (12 Questions)				Add B	Belo
+ Add a New Element Here		_			
		Re	vert	Apply	

STEP 2: Create your survey

For this example, we are putting the respondent's information at the very beginning of a new survey.

- You may display the respondent's information anywhere within a survey.
- It does not matter if you create your survey first or set-up the authentication first.

Create an initial survey question to display and confirm the respondent's information. These fields may be made editable depending on your survey needs.

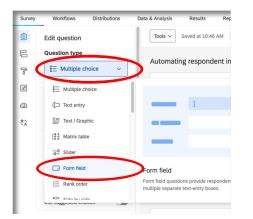
Go back to your Survey Builder



Option 1: Make the information editable for the respondent

The following set-up allows the respondent to edit the form fields. This set-up may be useful if the respondent is filling-out the survey for someone else or if one or more fields may need to have alternate information. (If you do not want the fields editable, skip to Option 2 below).

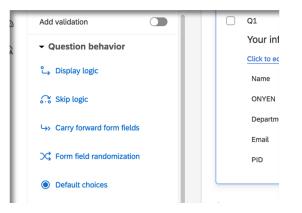
Add a Multiple Choice Form Field question type



Create your desired form fields. You may use only the fields you need.

Automating respondent information	on ····································
- Default Question Block	
Q1	
Your information:	
Click to edit validation	
Name	
ONYEN	
Department	
Email	
PID	
	<i>w</i>

From the left menu, under **Question Behavior**, click on **Default Choices**



You should now see the Edit Default Choices box. Link each field to the respondent's information.

Edit De	efault Choices			
١	/our information:			
	Name	•		
	ONYEN			
	Department	•		
	Email			
	PID	•		
			Close	Save
🗙 Clear			Close	Save

Click on the downward arrow for a field and go to **Embedded Data Field**. The field will be blank, but if you move your mouse over the downward arrow, the choices will be revealed.

e	Pipe text from a.				
EN	Survey Que	ion	>		
artment	Embedded	ata Field	> [~
il	GeolP Loca	on	>		
				_	
our information:					
Name	Pipe text from a	•			
ONYEN	Survey Question	> -			
Department	Embedded Data Field	> [~	
Email	GeoIP Location	× م		www.	
PID	Survey Links	> uid			
	Date / Time	> first nam			
	Opt Out Link	> last nam	ie		
	Random Number	> email			
	Panels Field	> departm	ent		
Survey I	Loop & Merge	> Pid			
	Quota		ntFirstName		
		Recipier	ntLastName		

Select the corresponding information for each field. You may combine information within a field. For example,

- 1. Choose first name and click Insert
- 2. Add a space in the form field
- 3. Click the arrow, go to Embedded Data field, navigate to last name and click Insert
- 4. Your form field should now read:

\${e://Field/first%20name} \${e://Field/last%20name}

• Notice there is a space between the two references.

Continue to add each fields reference and click save when you are done.

Your information:	
Name	\${e://Field/first%20name} \$
ONYEN	\${e://Field/uid}
Department	\${e://Field/department}
Email	\${e://Field/email}
PID	\${e://Field/Pid}
Your information:	
Click to edit validation	
Name	\${e://Field/first%20name} \${e://Field/last%20name}
ONYEN	\${e://Field/uid}
Department	\${e://Field/department}
Email	\${e://Field/email}
PID	\${e://Field/Pid}

Test it out

Publish the survey and test it.

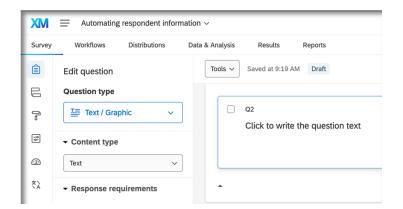
Note: You will already be logged-in with the current browser, so you may by-pass the login screen. Use a separate browser to which you are not logged-in to see the full experience.

	THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL
Your informe	ation:
Name	Matt Osment
ONYEN	matto
Department	Arts and Sci Information Svcs
Email	matto@email.unc.edu
PID	5555555

Option 2: Make the fields non-editable

This option will not let the respondent change the piped information corresponding with their UNC account.

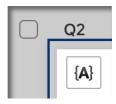
Add a Text / Graphic question type



Edit the question text with the Rich Text editor to add your field labels

	Rich Content Editor Piped Text
	Click to write the question text Edit Question Label
	22 [A] 전 Normal - Font - Size - B I
l	
•	Name: Email: ONYEN: Department:

Next to each label, you will use the Insert Piped Text tool to add your data reference



Select **Embedded Data Field**. The field will be blank, but if you click on the downward arrow, the choices will be revealed.

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Pipe	e text fr	om a				≞	•	*		÷⊫	1= 2=	•= •=	
	Survey	y Question			>								
	Embeo	dded Data	Fielc	i								~	
	GeolP	Location			>	0	<u> I</u>						
	Survey	y Links			>	uid							
	Date /	Time			>	first	nam	е					
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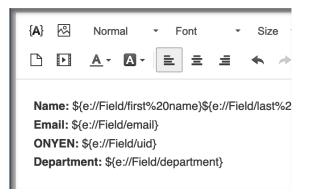
Select the corresponding information for each label. You may combine information within a row. For example,

- 5. Choose first name and click Insert
- 6. Add a space
- 7. Click the arrow, go to Embedded Data field, navigate to last name and click Insert

Name: \${e://Field/first%20name} \${e://Field/last%20name}

• Notice there is a space between the two references.

Continue to add each reference and click save when you are done.



Default Question Block

Q2 Name: \${e://Field/first%20name}\${e://Field/last%20name} Email: \${e://Field/email} ONYEN: \${e://Field/uid} Department: \${e://Field/department}

Test it out

Publish the survey and test it.

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