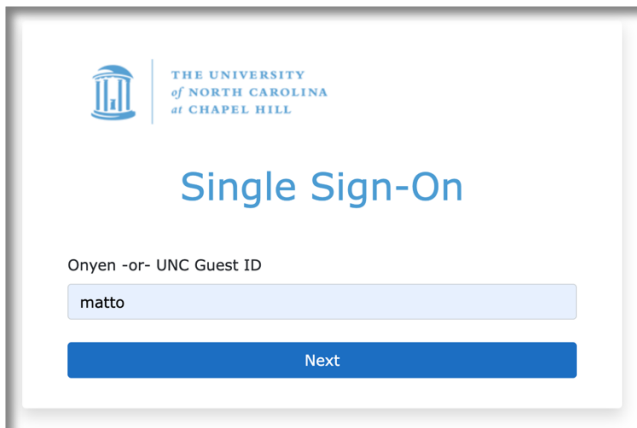


## Qualtrics Survey: Automating respondent information with ONYEN authentication

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.

### ONYEN log-in



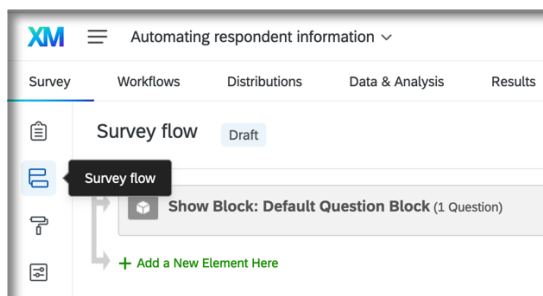
### Respondent's info automatically shown



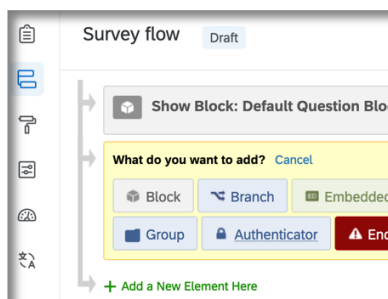
### STEP 1: Set-up the authenticator

*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**

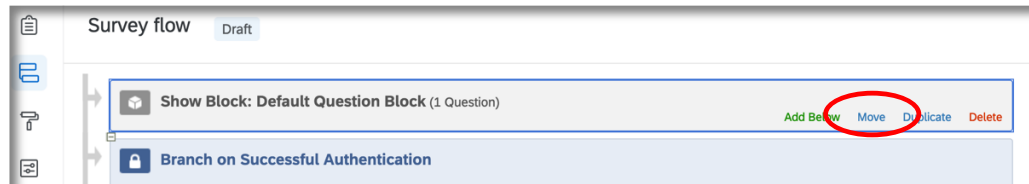


Click **+Add a New Element Here** and select **Authenticator**

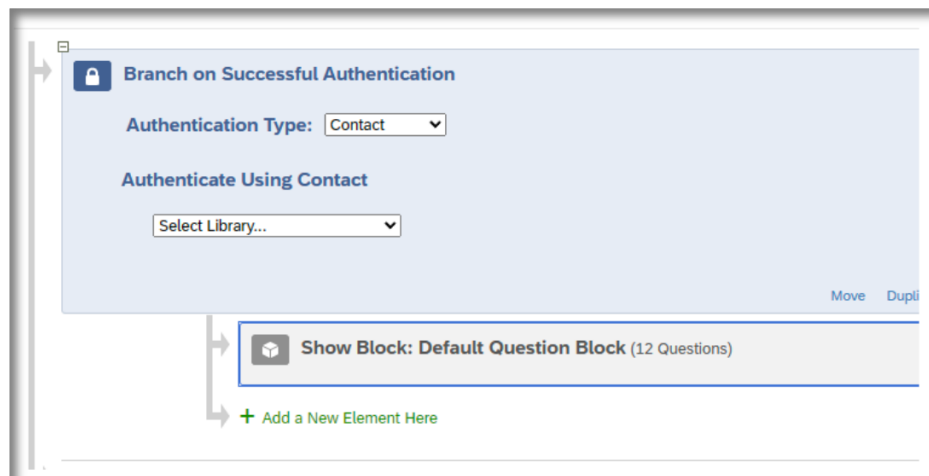


Move the **Default Question Block** below the **Authenticator Block**

From this:



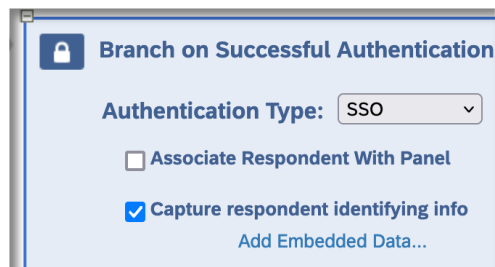
To this:



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:



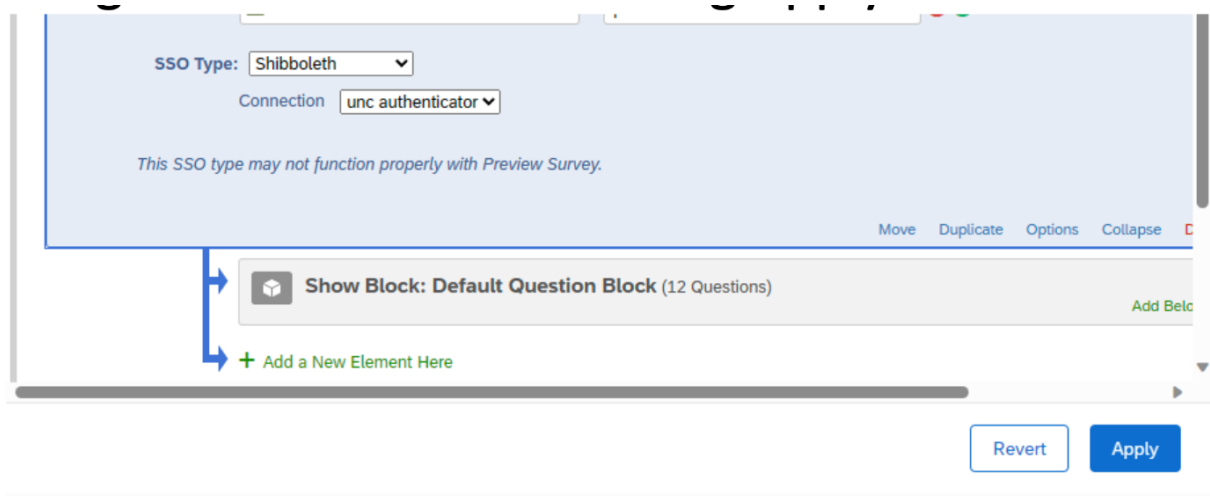
Note:

- 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



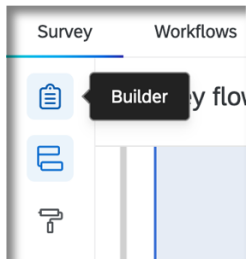
## STEP 2: Create your survey

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.

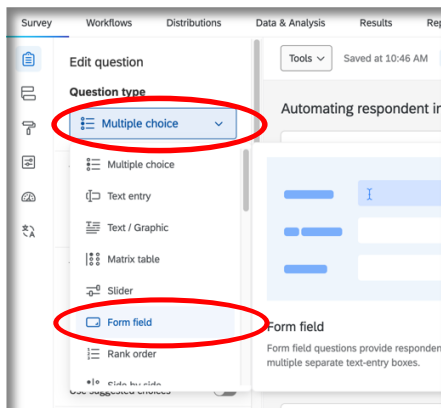
Go back to your **Survey Builder**



### 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

Default Question Block

Q1

Your information:

[Click to edit validation](#)

Name

ONYEN

Department

Email

PID

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

Add validation

**Question behavior**

- [Display logic](#)
- [Skip logic](#)
- [Carry forward form fields](#)
- [Form field randomization](#)
- Default choices**

Q1

Your inf

[Click to ec](#)

Name

ONYEN

Departm

Email

PID

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

**Edit Default Choices**

Your information:

Name

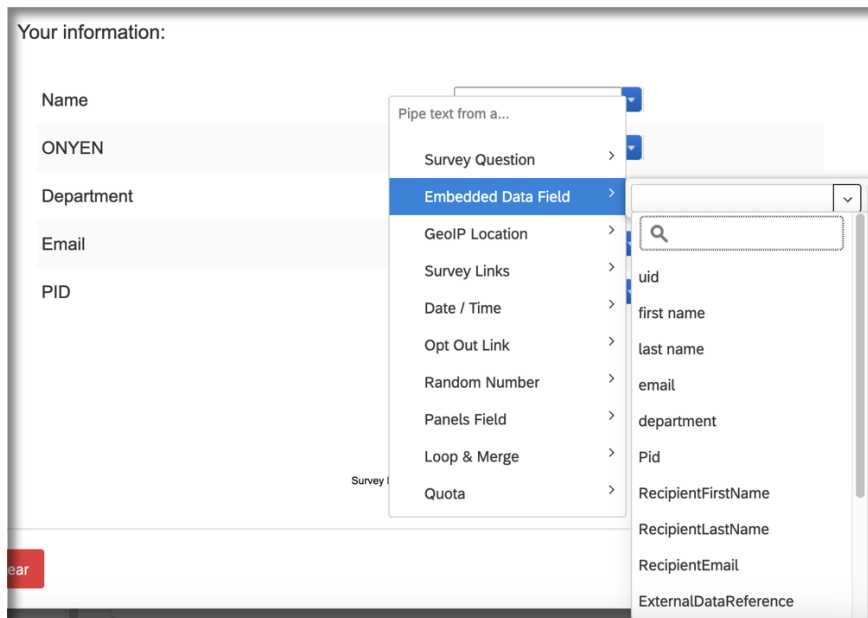
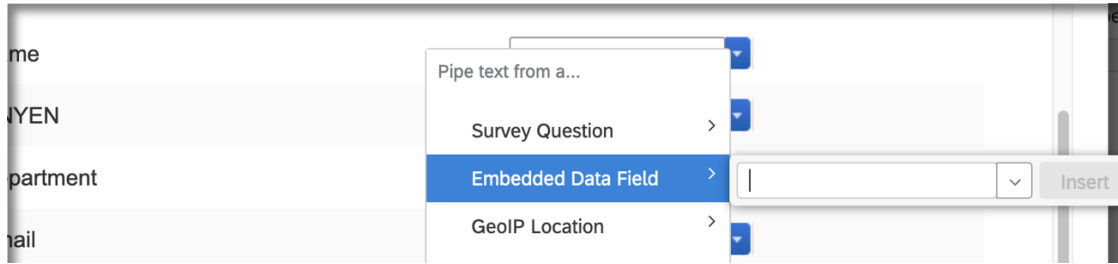
ONYEN

Department

Email

PID

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.



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	<input type="text" value="{e://Field/first%20name} \$"/>
ONYEN	<input type="text" value="{e://Field/uid}"/>
Department	<input type="text" value="{e://Field/department}"/>
Email	<input type="text" value="{e://Field/email}"/>
PID	<input type="text" value="{e://Field/Pid}"/>

Your information:

[Click to edit validation](#)

Name	<input type="text" value="{e://Field/first%20name} {e://Field/last%20name}"/>
ONYEN	<input type="text" value="{e://Field/uid}"/>
Department	<input type="text" value="{e://Field/department}"/>
Email	<input type="text" value="{e://Field/email}"/>
PID	<input type="text" value="{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.*



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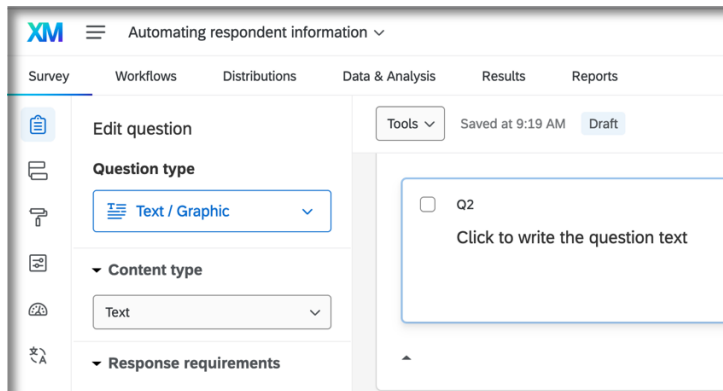
Your information:

Name	<input type="text" value="Matt Osment"/>
ONYEN	<input type="text" value="matto"/>
Department	<input type="text" value="Arts and Sci Information Svcs"/>
Email	<input type="text" value="matto@email.unc.edu"/>
PID	<input type="text" value="5555555"/>

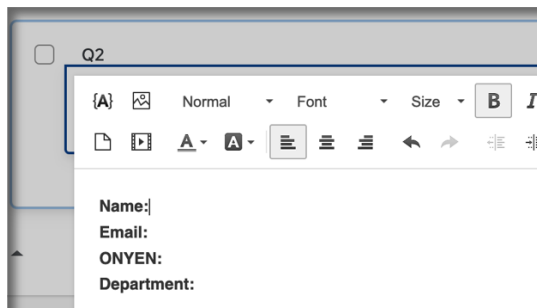
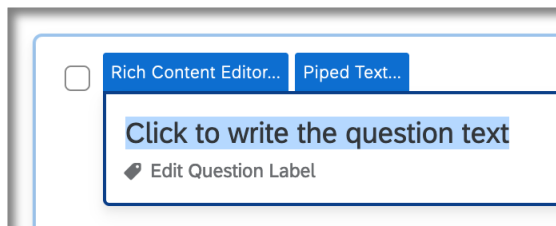
## Option 2: Make the fields non-editable

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

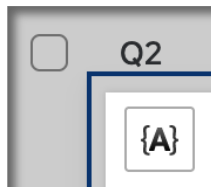
Add a **Text / Graphic** question type



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

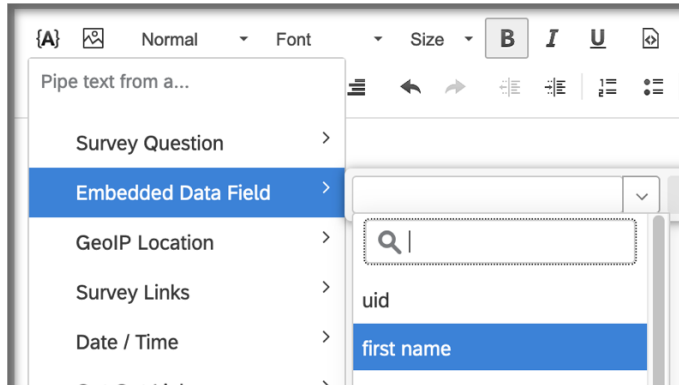


Next to each label, you will use the **Insert Piped Text** tool to add your data reference





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



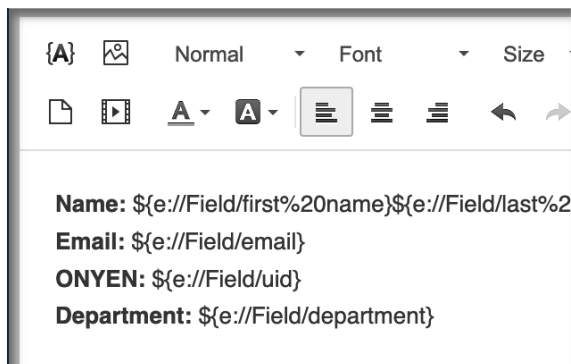
Select the corresponding information for each label. You may combine information within a row. For example,

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.

*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.*



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