Login/Password Action

The Login/Password action allows you to set up access protection for your survey. Respondents will be required to log in to take your survey. You can require both a username* and password or a password only. You can also use the Login/Password action for pre-populating your survey with data!

From a respondent standpoint, usernames are not case sensitive, whereas passwords are. When accessing your survey via a Login Action, a respondent will need to enter their password exactly as the password is specified in the login action setup.

When would I use a Login/Password action?

- **Example Use One: Protect Your Survey**

  The most common use for the Login/Password action is to protect your survey. You can protect both who accesses your survey and as well as how often the survey is accessed by each user using the Login/Password action.

- **Example Use Two: Pre-populate Your Survey**

  You can also use the Login/Password action to pre-populate fields in your survey so your respondents don't have to enter info you already have. Using this feature you can simply confirm that each respondent's information is correct and proceed to the rest of the survey.

Step 1: Add a Login Action

1. Click **Add New Action** on the page where you wish to place your action. We recommend that the Login Action is added on its own page. The Login Action is a gateway to all items on subsequent pages so if you have text or questions that you do not want to be seen prior to login, those should be placed on pages *after* the page containing the Login Action.
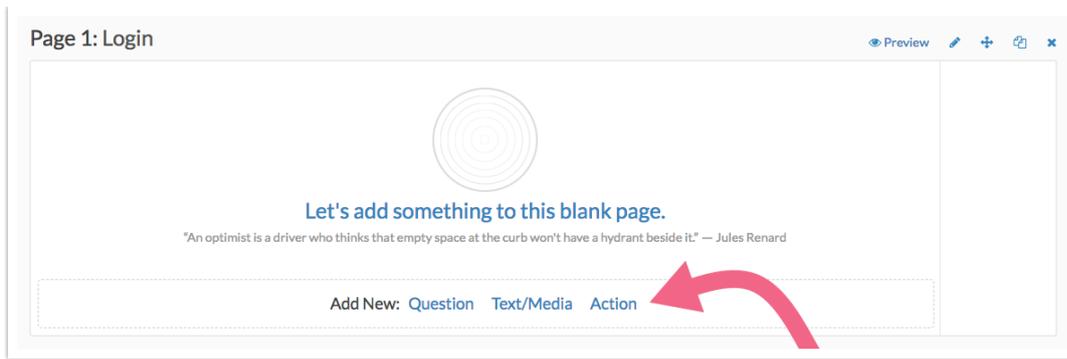
2. Locate the **Login/Password** action and click the **+ Add** button.

3. Give your action a **Name**. The name you create here will display to your respondents so we recommend adding some text for describing how to log in to the survey. Next, you will determine how access to the survey will be controlled.

Step 2: Set Up Access Controls

Next, you will be asked, *"How do you want to control access to this survey?"* There are 3 password control options covered below.

> Note: The Lookup ID/Password in an uploaded spreadsheet option is the only option that allows for pre-population.

Option 1: A single password shared by everyone - Specify a general password that all respondents will use to log in. This serves as basic protection to prevent respondents you do not wish to access the survey from getting through.

Option 2: Individual (one-time) passwords that deactivate after use - A one-time password prevents your respondents from re-entering the survey with the same password more than once. Use this option to prevent respondents from forwarding their password along to someone else.

You can choose to enter your own passwords or have SurveyGizmo generate random passwords for you. If you prefer to use SurveyGizmo to generate the passwords, click the **Generate Random Passwords** option and specify the number of passwords that you need.

> Note: If entering your own passwords, make sure that they are entered **One password per line** in the provided field.

Option 3: Lookup ID/Password in an uploaded spreadsheet - The Lookup ID/Password option allows you to upload an excel file that contains your usernames, passwords, and any other associated data you wish to pull into your survey.

This option also allows you to pre-populate questions in your survey with data from your spreadsheet/list. You could, for example, include respondent contact information in the survey, without them having to fill it out again.

Spreadsheet file requirements

- Excel file extensions: .csv, .xls, .xlsx. If you have special/foreign characters you will need to upload an .xls or .xlsx file or utf-8 encoded .csv. To learn how to encode a csv visit our UTF-8 Encoding Tutorial .
- The minimum required to create a record for a contact is a single column with unique passwords to be mapped to the password field.
- Order of the data columns and extra data columns are not important though if you are uploading a lot of data you may want to include only the data that you will be using.
- Both the login and password fields are case-sensitive, please keep that in mind!
- If you wish to include double quotation marks anywhere in the file you must save and upload an .xls file.
- The file size limit is **2MB**.

1. After selecting this option, indicate your desired password functionality:

a. **Single Use Passwords -** With this setting enabled, as soon as a password is used it will be marked as *used*. Once this is the case, the survey will not be accessible via that password again.

b. **Save and Continue Password*** - With this setting enabled, respondents can use their password to return to their in-progress survey response. After entering their password, respondents will be forwarded to the last page they submitted. If the survey was previously completed, respondents will be forwarded to the survey Thank You page.

   *In order to use the Save and Continue Password feature, you Login/Password

Action must be on the first page of your survey and must be the only question/action on that page. Text/Instruction elements can be added to this page.

   c. **No special settings** - Respondents can submit multiple responses with their password. Survey progress is not saved and the password is not inactivated after use.

2. Next, click **Choose File** and select the file from your computer.

3. Once you have selected a file, click **Map Spreadsheet Data.** Wait a few moments as the file uploads, the larger the file, the longer it can take to upload.

4. In the Map Fields dialogue, map your Username and Password fields to the appropriate *column* in your spreadsheet. At a minimum, you need to indicate what column in your spreadsheet contains the passwords.

   - If you wish to only require a Password field you can select the option to **Hide "username" field**. This is the only time this setting will be available and cannot be configured at a later time.
   - Indicate whether your file **includes a header row**. We recommend that the first row of your spreadsheet contains column header text, for example, username, password, etc.
   - If you are using additional data in your spreadsheet to populate survey fields and questions, select the checkbox to **Use this spreadsheet to pre-populate survey questions**. We will cover this in greater detail in the next section.

5. If you do not need to pre-populate survey questions, click **Start Uploading** to finish this process. Skip to Step 3 to continue your login action setup.

Step 3: Pre-populating Your Survey

As part of the **Lookup ID/Password from Spreadsheet** option, you can use data in your spreadsheet to pre-populate questions/fields in your survey. Keep in mind that you can pre-populate Hidden Value Actions if you don't want/need to expose the pre-populated information to your respondents.

1. If you wish to pre-populate fields in your survey with data from your spreadsheet, select the option to **Use this spreadsheet to pre-populate survey questions** on the **Map Fields** dialogue. This will allow you to map the data in your spreadsheet to the corresponding fields in your survey. If you wish to skip this step you can map data to questions later, on the Logic tab.

2. Each of your spreadsheet columns will have a corresponding **Select Question** dropdown menu where you can choose one of your compatible survey questions to push the column data to. *Note that you do not need to map all columns to questions.*

3. Click **Start Uploading** when you have finished mapping your data. Your data will display below once it is uploaded. This may take some time. You can save the action without seeing the data display or move on to the other tabs to finish setting up your action.
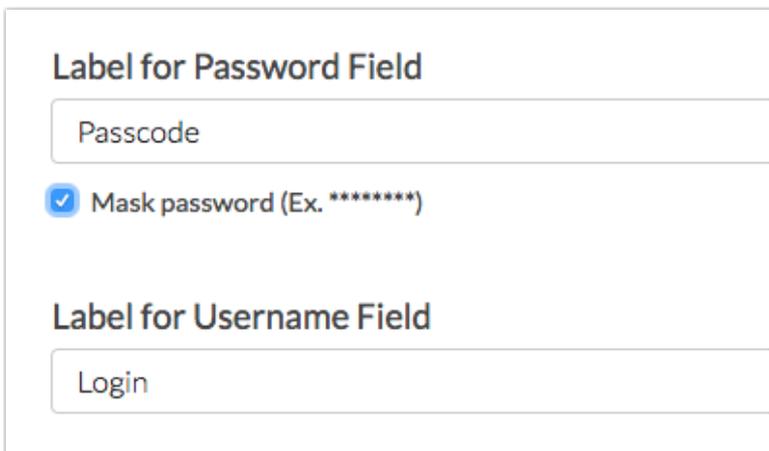

Question Types Available for Pre-Population

- Radio Buttons
- Rating (Likert Scale)
- Dropdown Menu
- Checkboxes
- Textbox
- Essay

- Checkbox Grid
- Radio Button Grid
- Semantic Diff
- Custom Group sub-questions of the above types

Step 4: Customize the Login Display

On the **Display** tab, you can customize the Labels for both the Username and Password fields (visible to your respondents). To do so, type in your desired labels into the **Label for Password Field** and **Label for Username Field**.

You can also select the option to **Mask password.** This will replace password characters with asterisks (*****) as the respondent types.

You will also see options to:

- **Pre-populate Username**
- **Pre-populate Password**

These options allow you to *optionally* specify text to display within the fields. These are also available to automatically log your survey respondents into the survey.

Both options can be populated via the **Select a Merge Code** tool. For example, if you are distributing your survey via an Email Campaign and are using the respondent email address as the password, you may want to automatically merge that email address into the password field via merge code.

Finally, if you wish to customize the error message that displays when login fails, update the content within the **Error message for login failure** field.

Add New or Edit Existing Passwords

If you find you need to add additional passwords to your login action there are a couple ways to accomplish this.

Add a Single Password

If you have a couple of passwords to add, it is probably easiest to add them one by one.

1. Edit your login action and click the link to **Add Individual Record** on the **Primary Setup** tab. This will open a panel to manually populate each field.

2. Next, provide information to create a record. The fields that read **Column: username** and **Column: password** are required. It is important to note that you only need to populate the Username field if you originally set up your Login/Password action to use this. If you selected **Hide "username" field** on setup then this field does not need to be populated when adding new passwords.

3. Click **Save** to create a new record. If you need to add another record, click to **Add Individual Record** and repeat the process.

Edit Passwords One-by-One

If you wish to make a change to the username or password, edit your login/password action.

1. On the **Primary Setup** tab, search for the record you wish to edit (on the Primary Setup tab). *You must search by username!*
   - By default, passwords are masked with asterisks. You may elect to **Show Passwords** to make it easier to locate the password that you are looking for.
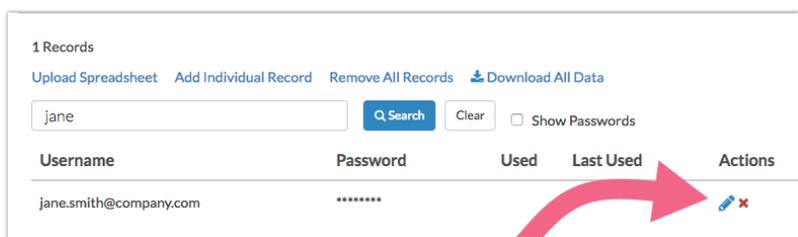

2. Once the search returns the record in question, click the pencil icon on the right to edit.

3. You will see all fields associated with the record, including **password** and **username**. Make any necessary changes here and **Save** the record when you are finished.

- You will also see **Record Status** on this page. The status will indicate whether the password is used/unused. If used, you will see the **Date Used** information.

Record Status
Unused
Date Used Never

Fields
password (Password)

sue.brown@company.net

username

Sue

Upload a New File

If you have a number of new passwords to add or edit you can choose to upload a new file.

1. Edit your login action and click the option to **Upload Spreadsheet** on the **Primary Setup** tab.

Login Type
Lookup ID/Password in an uploaded spreadsheet Change

4 Records
Upload Spreadsheet   Add Individual Record   Remove All Records   ⬇ Download All Data

Search by username   🔍 Search   ☐ Show Passwords

Username	Password	Used	Last Used	Actions
jane.smith@company.com	********			✏ ✖
jon.smith@company.net	********			✏ ✖

2. Click **Choose File** and select the spreadsheet file from your computer then click **Map Spreadsheet Data.**

3. Next, select your **Update options**.
   - **Add new data and update existing rows -** When selected this update option will match on existing records and update the data. The key for matching will be the username plus the password (unless username is not being used). *All data will be updated EXCEPT the Used status of the unique login.*
   - **Replace all existing rows with this data -** This will remove all existing contacts and replace them with contacts in your spreadsheet.

4. Indicate whether your file includes a header row and click **Start Uploading**.

Review Uploaded Passwords Via Search

There are a couple of options for reviewing the status of your uploaded passwords. You can do so on an individual basis by using the search tool, or you can download all of your previously uploaded data via a spreadsheet.

1. To check on the status of a specific record, search for the record by password via the **Search** field.

2. Once the record is returned, you will be able to see the following data:
   - **Used** - If the password has been used, you will see a checkmark here. If not yet used, this column will be blank.
   - **Last Used** - If the password has been used, you will see the date of last use here. If not yet used, this column will be blank.

3. If the password has been used, you will see an *eye icon* under the **Actions** column. Click this icon to view the response. This will open a new window/tab and take you to **Results > Individual Responses**.


Review Uploaded Passwords Via Spreadsheet Download

If you prefer to review your previously uploaded passwords in bulk, you can download a spreadsheet file directly from your login action.

1. Edit your login action and click **Download All Data**.
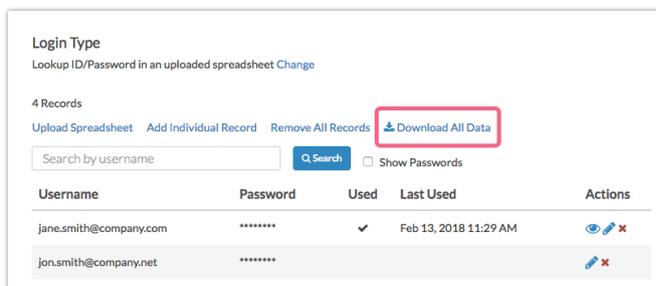
2. Your export will run and once ready you will see the option to **Click to download your export**. Please note that depending on the number of records that you uploaded, the export make take several minutes to complete.
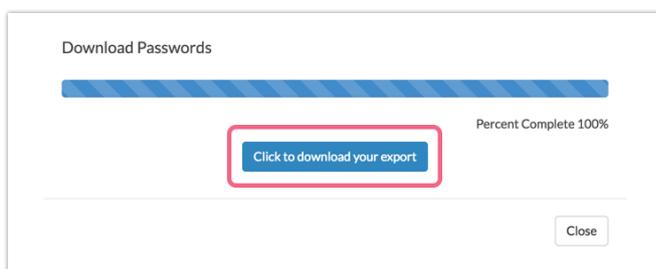
3. Once the spreadsheet downloads, feel free to open it to review your records. The spreadsheet will contain all of your previously uploaded information as well as the following relevant columns:

   o **used** - This column indicates whether the password associated with the record

has been used. If used, the row will display **TRUE**. If not used, the row will display **FALSE**.

- **last used** - If used, this column will contain a date. If not used, the column will be blank.
- **times used** - If you have elected to not toggle the **Single Use Password** setting when first creating your login action, respondents will be able to re-use their passwords. This column will indicate the number of times a password has been used. If the password has not been used, this column will be blank.
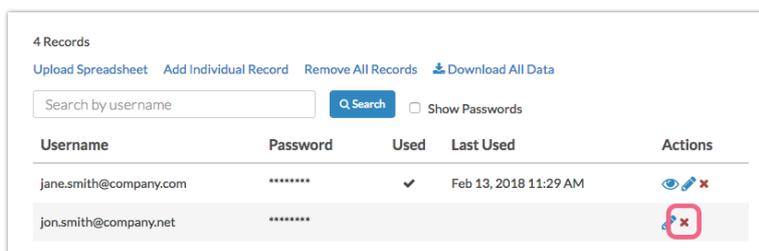
Remove Records

There are two options for removing records from your Login/Password:

- **Remove Individual Record**
- **Remove All Records**

Remove Individual Record

1. To remove an individual record, edit your login action and use the **Search** field on the **Primary Setup** tab to search for the record (by password).

2. Once the record is returned, click the red **x** icon associated with the record to remove it. You will need to **Confirm** this action before the record is fully deleted.

3. If you need to remove additional records, repeat this process as needed.

Remove All Records

1. To remove all records previously uploaded to your Login Action, edit the action and click on the **Remove All Records** link on the **Primary Setup** tab.
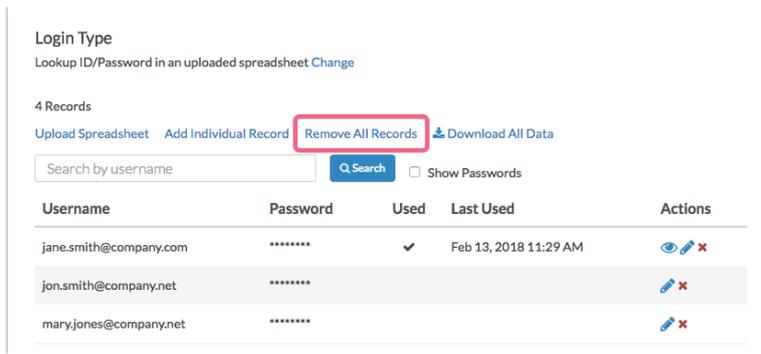
2. You will be asked to **Confirm** this selection before all of your password records are removed permanently.

Logic Tab

There are a few options on the Login Action's **Logic** tab that you should be aware of:

- There is also an option to **Disable Action**. Disable the action while you are testing other elements of the survey, then re-enable it once you are ready to launch!
- You can also toggle an option to **Require password when editing the survey**. This would apply if you are using email campaigns to distribute the survey and/or edit links to edit responses after they have been recorded.
- On the Logic tab, you can also check and change how the data in your file is mapped into your survey if necessary. Do this via the mapping on the **Pre-Populate Questions** section.
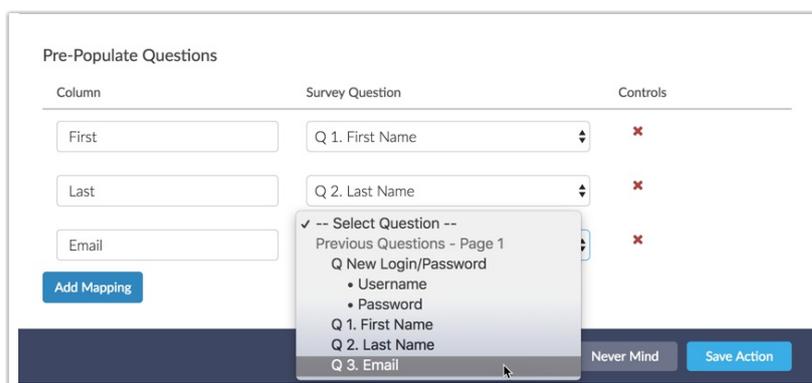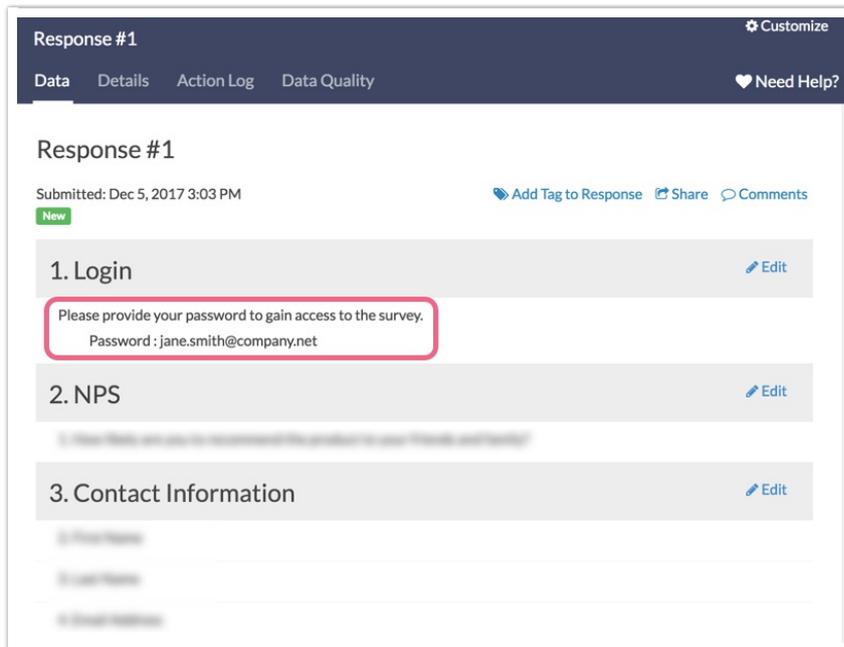

Reporting on a Login/Password Action

If you need to report on what username or password a respondent used to log in, this information is available in three locations.

Individual Responses

1. To view a specific respondent's Login/Password credentials, go to **Results > Individual Responses**.

2. Search for the respondent's Individual Response. Once the response is returned, click on it to open the details. The Login and Password will display on the page where your Login/Password action is located.

Standard Report

Login/Password Action information is not available via a Standard Report.

Legacy Summary Reports

1. If you would like to see a list of all the Logins and Passwords used in your survey, go to **Results > Reports**.

2. Select **Create Report > Legacy Summary Report**. Select the option to **Include Oper Text** and click **Create Report**.

3. Your Login/Password action will display as two appendix elements, one for username (if used) and another for password.

CSV/Excel Exports

Login/Password actions are also available in the CSV/Excel Export . You will see a column for username (if applicable) and a column for password.

FAQ

What question types can I pre-populate?

The following question types are compatible with Login/Password Action pre-population:

- Radio Buttons
- Rating (Likert Scale)
- Dropdown Menu
- Checkboxes
- Textbox
- Essay
- Checkbox Grid
- Radio Button Grid
- Semantic Differential
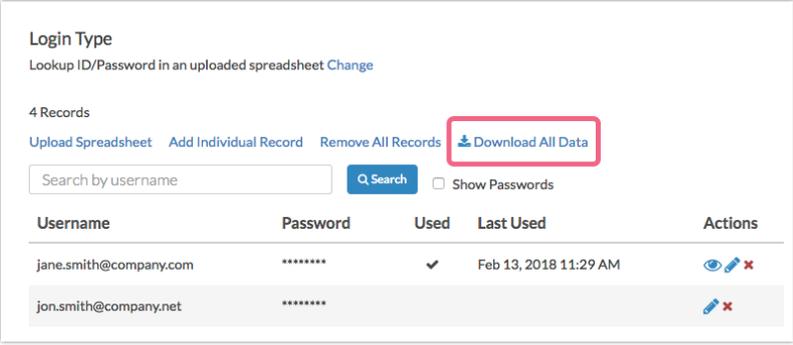- Custom Group subquestions of the above types

What should I avoid?

Avoid using very large lists - Login/Password actions can time out on upload and when survey takers are logging in. A "very large list" is defined by both the number of columns you are uploading as well as the number of rows. It's hard to say where an exact limit is because each list is unique but if you feel like the list is large, it probably is!

If you are anticipating tens or hundreds of thousands of responses and you're looking to pre-populate or provide a unique way for your respondents to log in, we recommend using an email campaign in place of a Login/Password action.

Can I View or Download Uploaded Logins?

Yes! To do so, edit your Login Action and click on the **Download All Data** link on the **Primary Setup** tab. A spreadsheet will be generated and you will be prompted to download this file. The file will contain all of your previously uploaded records as well as data about password usage.


Is there anything else I should be aware of?

- If copying a survey with a Login Action where you have uploaded a password file, you will need to upload a new file into the action in the copied survey.
- If you need to search for a specific record, you must search by username. You cannot search by password.
- If you are using Preview to test your Login Action, be sure to click the option to Fire Actions, otherwise, it will not display!
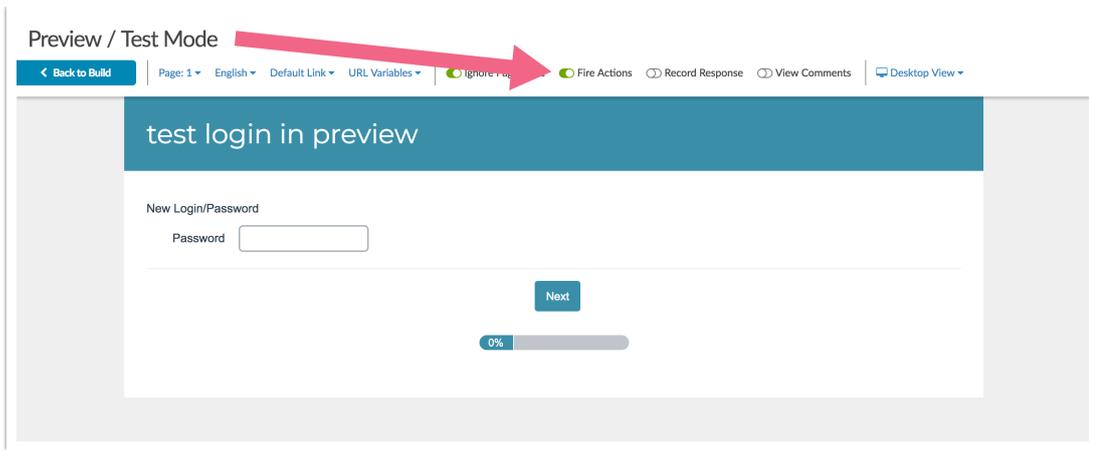
Why can't I select the *Save and Continue Password* option?

In order to use the Save and Continue Password option, your Login/Password Action must be on the first page of your survey. Additionally, no other Questions or Actions can be on this page.

Keep in mind that you can add Text/Instructions elements to Page One.

If you add a question or action to the page containing your *Save and Continue Login Action*, you will trigger the following error both on the survey page, and when editing your login action:

> To use this feature, this action must be on the first page of your survey and it cannot share a page with any other questions or actions.
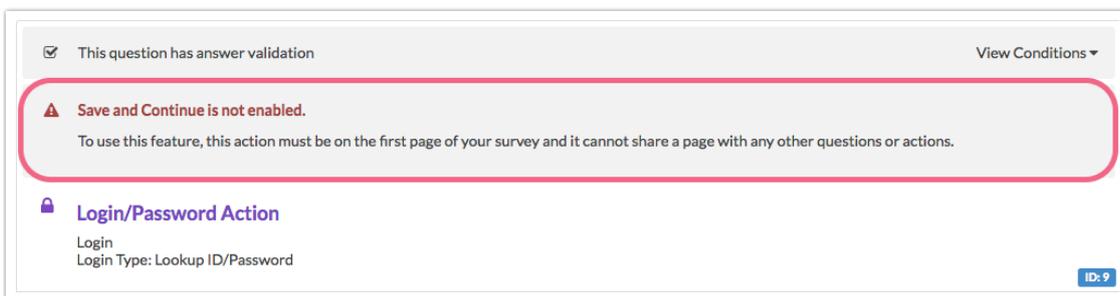
This error will be removed once the Login Action is the only question/action on the page.

Related Articles