

Checkbox 5 Conditions & Branching Guide

Conditions and Branching take the respondent along a specific path tailored to them based on responses or user attributes. Both branching and conditional logic allow you to specify that an action, such as displaying a survey page or item, skipping a respondent to the end of a survey, or triggering an email alert, only occurs if certain conditions are met.

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Page Conditions vs. Item Conditions

The screenshot displays the 'Conditions' configuration interface for a survey item. The left sidebar shows a list of pages: Page 1 (1 item), Page 2 (1 item), and Page 3 (3 items). Below the list, the 'Conditions' section indicates 'There are no conditions. This page will always be displayed.' and the 'Branching' section indicates 'There are no branching rules.' A red arrow points from the 'Page Conditions' button to the 'Conditions' section. The main panel shows the 'Conditions' tab for the question '* How often do you purchase from our store?'. The 'Conditions' section below the question shows 'This item will always be displayed.' A red arrow points from the 'Item Conditions' button to the 'Conditions' section. At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

Conditions can be applied at the survey page or item level. **Page Conditions** allow you to specify whether or not a page is shown if certain conditions are met. **Item Conditions** allow you to specify that a single survey item is shown if certain conditions are met.

Both page and item conditions have two parts: an **expression** and an **action**. The expression is the logical statement that is evaluated by Checkbox to determine if the condition is true, and the action is what Checkbox will do if the condition evaluates to true. For conditions applied to a

survey item, the action is to display the item to the respondent.

For example, if a condition has an expression that reads "This item will be displayed if the answer to 'How old are you?' is greater than 18" and that expression evaluates to true when the respondent takes the survey because they input their age as 30, the item to which that condition is attached will be displayed.

Page Conditions vs. Branching

The screenshot shows the 'Edit Survey - Bob's Bikes Conditions' interface. On the left, a sidebar lists 'Hidden Items' (0 items), 'Page: 1' (1 item), and 'Page: 2' (1 item). Below 'Page: 2' are buttons for 'Add Item', 'Move', 'Copy', and 'Delete'. Underneath are sections for 'Conditions' (stating 'There are no conditions. This page will always be displayed.') and 'Branching' (stating 'There are no branching rules.'). A red arrow points from the 'Branching' section in the sidebar to the 'Branching for Page 2' section on the right. The 'Branching for Page 2' section has a 'Go to page' dropdown menu set to 'Page: 3'. Below this are fields for 'Source Type', 'Source', 'Comparison', and an 'Add' button. At the bottom right are 'SAVE' and 'CANCEL' buttons.

Page branches are simply page conditions where the action is "go to page X" rather than "show page/item." Branch conditions are evaluated after a page is submitted; therefore expressions created for page branch conditions may include items on the current page, while normal page and item conditions may only include items located on previous pages in the survey.

Page and item conditions CANNOT be added to the same page of a survey that they intend to evaluate. Branches can.

Conceptually, you can accomplish the same behavior with page conditions as you can with branches. If, for example, your survey had four pages of items intended for members of a specific department, you would not want to show those pages to respondents not in that department. You could place a condition on each of the four pages so that each page would only be displayed if the respondent was a member of the desired department. It would be more efficient to use branching, however, where you would create a branch on the page before the four department-specific pages that then moved the respondent directly past the four pages to the subsequent page.

Page Condition and Branching Review:

Page Conditions: Can only be configured to review items that have already been collected. You cannot create a condition on the same page that the condition is configured to evaluate.

Conditions are evaluated upon the initial load of each page.

Branching: Can be configured on the same page as the collected response used within the branch. Branches are evaluated upon the submission of the current page.

Conditions and Branching Sources

Conditions and branching can be based on multiple **source types**:

Questions/Survey Items:

Conditions can be based on the answers to questions on previous pages. Branching can be based on the answers to questions on the current page.

Pre-Registered User Attributes (i.e. First Name, Last Name, Email Address):

Apre-registered user is a respondent with a user profile stored within Checkbox from which source data can be extracted.

Response Properties (i.e. Language, IP Address, Current Date)

Conditions and Expressions Theory

Conditions are logical statements that can be placed on survey items and pages. Expressions are logical statements that consist of a source operand, and operator, and a target operand and exist *within* Conditions. If the result of comparing the source operand with the target operand using the operator is true, the expression is true. A source operand might be a respondent's answer to a survey item, the target operand might be one of the possible item options, and the operator is a logical comparison.

For example, a typical expression would be:

"If [the answer to item] '1.1 How old are you?' Is Greater Than 18."

In this example, the survey item 'How old are you?' is the source operand, the value 18 is the right operand, and "Greater Than" is the operator. A condition would be this entire statement as a whole.

How to add an Item Condition in Basic View

The screenshot shows the 'Conditions' tab in the survey editor. The 'Conditions' tab is highlighted with a red box. Below it, the 'BASIC VIEW' tab is also highlighted with a red box. There are two radio buttons: 'Show Survey Item when ANY of these statements are true.' and 'Show Survey Item when ALL of these statements are true.' The 'New Condition' section contains a form with five numbered steps: 1. 'Question' dropdown, 2. '2.1 Is this your first purchase from our store?' text field, 3. 'Is Equal To' dropdown, 4. 'No' dropdown, and 5. 'Add' button. All these elements are highlighted with red boxes.

To add conditions to a survey item, click on the '**Conditions**' tab in the survey editor. In this example we will be creating a condition using the '**Basic View**'.

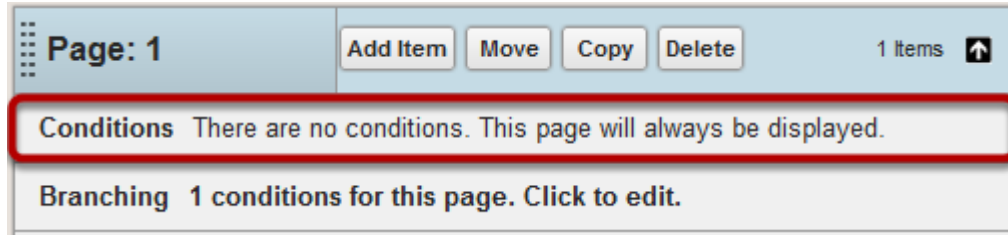
Use the Basic View when adding one or more simple conditions. Use the Advanced view for Compound conditions.

Create your condition expression using the steps below:

1. Select **Source Type** (Question, User Attribute, or Response Property)
2. Select **Source** (source operand). If you select "Question" as your Source Type, the Source drop-down will populate with all questions preceding this survey item. If "User Attribute" is selected as your Source Type, the Source drop-down will populate with user attribute labels. If "Response Property" is selected as your Source Type, the Source drop-down will populate with a list of response properties.
3. Select **Comparison** (operator)
4. Select/enter **Value**. Depending on the comparison you selected, the Value field may appear as a drop-down, text field, or may not appear at all. If you select "Question" as your Source Type, a drop-down list will populate with the answer options for the question you selected as your Source.
5. Select '**Add**' to add you condition.

You may create additional conditions or select '**Save**' to save your changes. If the condition expression you create here is true, the survey item will display to the respondent. If it is not true, it will be hidden from the respondent.

How to Add a Page Condition in Basic View



Page: 1 Add Item Move Copy Delete 1 Items ↕

Conditions There are no conditions. This page will always be displayed.


Branching 1 conditions for this page. Click to edit.

To add conditions to a survey page, click on the '**Conditions**' tab, located above the 'Branching' tab beneath your survey page number.

Create your condition expressing using the steps outlined under "How to add an Item Condition in Basic View."

ANY vs. ALL

Show Survey Item when ANY of these statements are true.

 Show Survey Item when ALL of these statements are true. 

Question	7.2 First Name:	Was Answered	Edit Remove
Question	7.3 Last Name:	Was Answered	Edit Remove
Question	7.4 Email Address:	Was Answered	Edit Remove

When adding two or more conditions in the **Basic View** to a survey item or page you must specify whether you want Checkbox to show the item/page to the respondent when **ANY** of the condition expressions are true, or when **ALL** of the expressions are true.

If **ALL** is selected, the survey page or item will only display to the respondent when all of the conditions you created for this individual item/page are true.

If **ANY** is selected, the survey page or item will display to the respondent when any one of the of the conditions you created for this individual item/page is true.

In the example above, the respondent will only see this survey item when he enters his First

Name, Last Name, and Email Address on page 7 of the survey. The above image is a view of the condition statements in the conditions editor. These conditions are summarized below the question on the survey item preview.

Thank you @@002071 for your feedback and for shopping at Bob's Bikes!
You will be receiving our free e-newsletter beginning next month.

Conditions:
This item will be displayed when:

- '6.2 First Name:' Was Answered' And
- '6.3 Last Name:' Was Answered' And
- '6.4 Email Address:' Was Answered'

Advanced View

Question	5.2 Please rate your overall s	Is Equal To	1	Edit Remove
And				
Question	7.4 Email Address:	Was Answered		Edit Remove
And				
New Condition				
Or				
Question	5.2 Please rate your overall s	Is Equal To	2	Edit Remove
And				
Question	7.4 Email Address:	Was Answered		Edit Remove
And				
New Condition				
Or				
New Condition				

Separates the two Conditions

The **Advanced View** is used for creating compound conditions. When you have multiple condition expressions In the Basic View you select an ANY option to display the item/page when [A **OR** B] are true, and the ALL option to display the item/page when [A **AND** B]

Compound conditions arise when you want an item/page to be displayed when [A **AND** B] **AND/OR** [B **AND** C] are true.

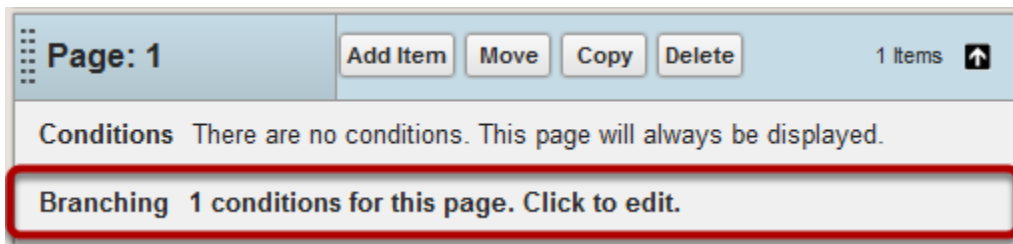
In the example above, there are two scenarios where this item can be displayed:

Scenario 1 - When a respondent gives a rating score of 1 in item 5.2 **AND** enters their Email Address in item 7.4

Scenario 2 - When a respondent gives a rating score of 2 in item 5.2 **AND** enters their Email Address in item 7.4

If either of these conditions are met, the item will be displayed to the respondent.

How to Create a Branching Rule



To add a branching rule to a survey page, click on the '**Branching**' tab, located below the 'Conditions' tab beneath your survey page number.

Branching for Page 1

Go to page ←

And

Or

Go to page

To add a branching rule to a survey page, click on the '**Branching**' tab, located below the 'Conditions' tab beneath your survey page number.

Create your branch expression using the steps below:

1. Select the page you wish to branch a respondent to. The "**Go to page**" drop-down contains all pages after the current page, including the Completion page. Branching to the Completion page will end the survey for the respondent.
2. Select **Source Type** (Question, User Attribute, or Response Property)
3. Select **Source** (source operand). If you select "Question" as your Source Type, the Source drop-down will populate with all questions preceding this survey item. If "User Attribute" is selected as your Source Type, the Source drop-down will populate with user attribute labels. If "Response Property" is selected as your Source Type, the Source drop-down will populate with a list of response properties.
4. Select **Comparison** (operator)
5. Select/enter **Value**. Depending on the comparison you selected, the Value field may appear as a drop-down, text field, or may not appear at all.
6. Select '**Add**' to add your branching rule.