

## Checkbox 5 Manager Navigation

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This guide provides an overview of Checkbox Survey **Managers**.

### Main Menu



Checkbox is organized into five '**Managers**':

- Survey Manager
- Users Manager
- Styles Manager
- Libraries Manager
- Settings Manager (cog icon at far right)

Each Manager has a similar **menu-dashboard layout**. When a Manager is opened, you will find a list of entities on the left side of the screen. This list may contain surveys, users, styles, libraries, or application settings depending on which Manager you are accessing. When you select an item on the left side of the screen, a dashboard will expand on the right side of the screen. This dashboard provides an at-a-glance view of all pertinent data related to that particular item.

*CHECKBOX TIP: Use the '**Search**' field to search for terms either universally or by category (Surveys & Folders, Responses, Users, Reports, Groups, Invitations).*

*CHECKBOX TIP: Use the '**Admin**' drop-down to log-out/log-in, and to contact Checkbox Support if you have a support contract.*

## Survey Manager

The screenshot displays the Survey Manager interface. On the left, a sidebar shows a list of surveys and folders: 'Customer Surveys (3)', 'File Upload (1)', 'Survey Folder (1)', and 'Feedback Survey'. The 'Feedback Survey' is selected. The main area shows the configuration for the 'Feedback Survey'. It includes tabs for 'Edit Survey', 'Status', 'Configure', 'Responses', 'Reports', and 'Invitations'. Below these are buttons for 'Launch', 'Preview', 'Test', 'Copy/Move', 'Export', and 'Delete'. The 'LINKS' section provides two URLs: 'http://howto.checkboxonline.com/Survey.aspx?s=d109971f30c14224afb18dde2f418cc2' and 'http://howto.checkboxonline.com/Feedback-Survey.aspx'. The 'INFORMATION' section shows 'Created By: admin', 'Last Updated: 05/02/2012 02:32 PM', and checkboxes for 'Scored', 'Locked', and 'Anonymize Responses'. The 'ACTIVATION (OPEN TO RESPONDENTS)' section includes checkboxes for 'Active', 'Allow Back Button', 'Allow respondents to edit previously completed responses', and 'Allow respondents to stop and resume their response later', along with input fields for 'Total response limit' and 'Per Respondent response limit', both set to 'No limit'. The 'STATISTICS' section shows 'Completed Responses: 13', 'Pages: 4', and 'Questions: 3'.

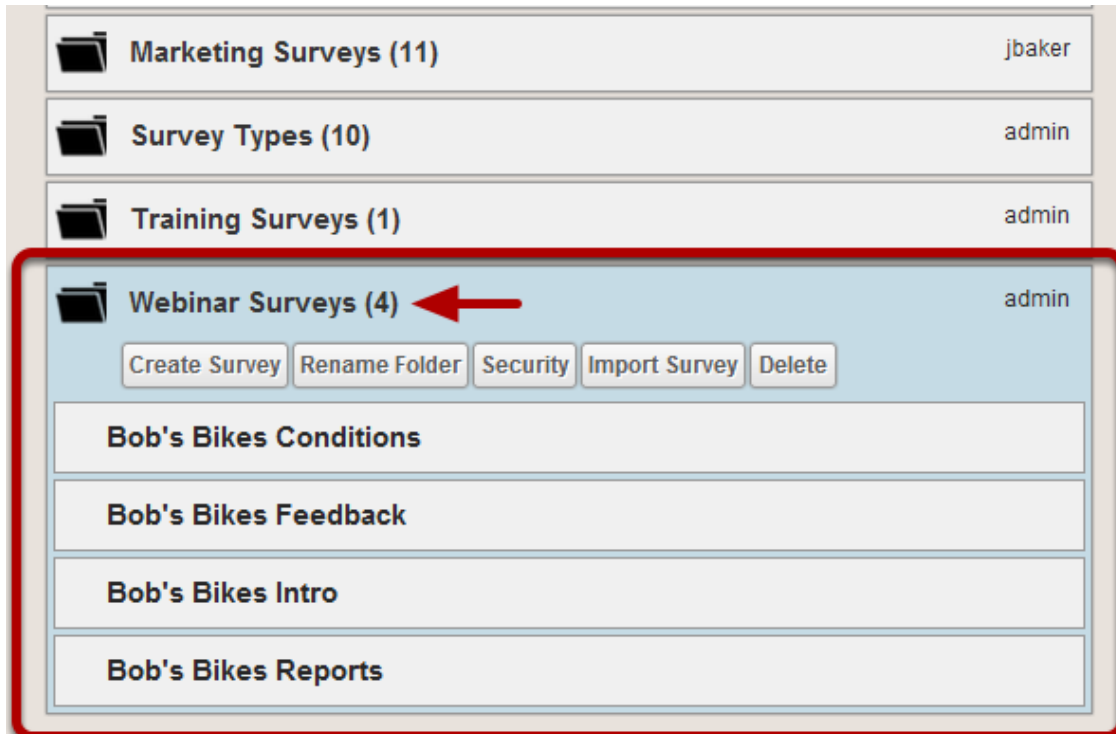
The **Survey Manager** is the database where all of your active and inactive surveys and survey folders are stored.

Select a **survey** to view the **Survey Dashboard**, which gives you at-a-glance access to various survey features, including:

- Edit Survey
- Survey Properties
- Activation and Response Limits
- Permissions & Resume & Edit Options
- Responses & Exporting
- Reports

- Invitations

To expand a **Dashboard Menu**, select the arrow on the menu bar.



Select a **folder** to expand it and view any surveys the folder contains. The number in parentheses to the right of the folder name indicates the number of surveys contained within that folder.

## User Manager

The screenshot shows the 'User Manager' interface in the Checkbox 5 application. The top navigation bar includes 'checkbox5' and 'how-to guide'. Below this, the 'User Manager' title is displayed. The interface is divided into a left sidebar and a main content area. The sidebar has tabs for 'Users', 'User Groups', and 'Email Lists'. The 'Users' tab is active, showing a table of users with columns for 'User Name' and 'Email'. The 'user1' row is selected. Above the table are buttons for 'Add New User' and 'Import users', which are highlighted with a red box. The main content area shows the details for 'user1', including 'Login Information', 'Profile Properties', 'User Roles', and 'Group Memberships'.

| User Name                                 | Email              |
|---|--------------------|
| <input type="checkbox"/> admin            | admin@checkbox.com |
| <input type="checkbox"/> ccraven          | ccraven@bevnet.com |
| <input checked="" type="checkbox"/> user1 | user1@email.com    |
| <input type="checkbox"/> user2            | user2@email.com    |
| <input type="checkbox"/> user3            | user3@email.com    |
| <input type="checkbox"/> user4            | user4@email.com    |

**user1**

Login Credentials Profile Properties User Roles Group Memberships

**Login Information**

User Name : user1  
Email : user1@email.com  
Auth Type : CheckboxPasswordUser  
Automatic Login : http://professionalservices.checkboxonline.com/Login.aspx?u=11fb0702-8267-4da2-9a40-7f32ce942f  
User Status : Enabled - Disable

**Profile Properties**

FirstName: Jimmy  
LastName: Johnson  
CompanyName: Vinyl Vlog

**User Roles**

Report Administrator

**Group Memberships**

Employees

Add and manage users within the **User Manager**. On this page you can create, modify or delete user profiles, import lists of users or email addresses, create and modify user groups, and designate user access roles and permissions.

To add/import users, click on the '**Users**' tab from the menu on the left. From there, you can select the orange **Add New User/Import Users** buttons.

checkbox5 SURVEYS **USERS** STYLES LIBRARIES

Users User Groups Email Lists COLLAPSE

Add New User Import users Manage the "Everyone" group

Sort by User Name ▲ Delete user(s) Delete user(s) responses

| User Name                                 | Email              |
|---|--------------------|
| <input type="checkbox"/> admin            | admin@checkbox.com |
| <input type="checkbox"/> ccraven          | ccraven@bevnet.com |
| <input checked="" type="checkbox"/> user1 | user1@email.com    |
| <input type="checkbox"/> user2            | user2@email.com    |
| <input type="checkbox"/> user3            | user3@email.com    |
| <input type="checkbox"/> user4            | user4@email.com    |

**user1**

Login Credentials Profile Properties User Roles Group Memberships

**Login Information**

User Name : user1  
 Email : user1@email.com  
 Auth Type : CheckboxPasswordUser  
 Automatic Login : http://professionalservices.checkboxonline.com/Login.aspx?u=11fb0702-8267-4da2-9a40-7f32ce942f  
 User Status : Enabled - Disable

**Profile Properties**

FirstName: Jimmy  
 LastName: Johnson  
 CompanyName: Vinyl Vlog

**User Roles**

Report Administrator

**Group Memberships**

Employees

To **edit** existing user information, select the desired user from the list on the left and use the buttons at the top of the user dashboard on the right to modify:

- Login Credentials
- Profile Properties
- User Roles
- Group Memberships

checkbox5 SURVEYS **USERS** STYLES LIBRARIES

Users User Groups Email Lists COLLAPSE

Add New Group

Sort by Group Name ▲ Delete Group(s) Copy Group(s)

| Group Name                                    | Member Count |
|---|--------------|
| <input checked="" type="checkbox"/> Employees | 2            |
| <input type="checkbox"/> Test Group           | 0            |

**Employees**

Properties Add Members Security Copy Group

**Members** Remove Selected Remove All Users from Group Delete All Group Members from Checkbox

| User Name                      | Email           |
|--------------------------------|-----------------|
| <input type="checkbox"/> user1 | user1@email.com |
| <input type="checkbox"/> user2 | user2@email.com |

To add groups, select the '**User Groups**' tab from the menu on the left. From there, you can click the **Add New Groups** button.

The screenshot shows the 'checkbox' dashboard with the 'USERS' tab selected. The 'User Groups' sub-tab is active, displaying a table of groups. The 'Employees' group is selected, and a red arrow points to the edit icon (a square with a right-pointing arrow) next to it. The right-hand panel shows the 'Employees' settings, with a red box highlighting the 'Properties', 'Add Members', 'Security', and 'Copy Group' buttons. Below these are 'Members' management options: 'Remove Selected', 'Remove All Users from Group', and 'Delete All Group Members from Checkbox'. A table lists the members:

| User Name | Email           |
|-----------|-----------------|
| user1     | user1@email.com |
| user2     | user2@email.com |

To **edit** a group, select the desired group from the list on the left and use the settings options in the dashboard to the right.

The screenshot shows the 'checkbox' dashboard with the 'USERS' tab selected. The 'Email Lists' sub-tab is active, displaying a table of email lists. The 'Add New Email List' button is highlighted with a red box. The 'Email List 1' is selected, and a red box highlights the 'Add New Email List' button. The right-hand panel shows the 'Email List 1' settings, with buttons for 'Properties', 'Add Addresses', and 'Security'. Below these are 'Addresses' management options: 'Delete Selected'. A table lists the addresses:

| Email Address     |
|-------------------|
| user1@company.com |
| user2@company.com |

If you would like to send survey invitations to individuals without setting them up as registered users, simply click the '**Email Lists**' tab and then the orange '**Add New Email List**' button. From here you can either manually type or cut and paste email addresses into the text box, or upload a file from your computer.

## Styles Manager

**checkbox** SURVEYS USERS **STYLES** LIBRARIES

admin

Survey Styles COLLAPSE

New Survey Style Import Survey Style

Sort by Style Name ▲ Delete style(s)

| <input type="checkbox"/>            | Style Name          | Style Type | Created By |
|-------------------------------------|---------------------|------------|------------|
| <input checked="" type="checkbox"/> | Beach               | Standard   | admin      |
| <input type="checkbox"/>            | Bob's Bikes         | Standard   | admin      |
| <input type="checkbox"/>            | Chic Boutique       | Standard   | admin      |
| <input type="checkbox"/>            | Company Logo        | Standard   | admin      |
| <input type="checkbox"/>            | Content Frame       | Standard   | admin      |
| <input type="checkbox"/>            | Green AZ Style      | Standard   | admin      |
| <input type="checkbox"/>            | Holiday Style       | Standard   | admin      |
| <input type="checkbox"/>            | Mobile              | Smartphone | admin      |
| <input type="checkbox"/>            | Orange Sherbet      | Standard   | admin      |
| <input type="checkbox"/>            | Product Packaging   | Standard   | admin      |
| <input type="checkbox"/>            | Satisfaction Survey | Standard   | admin      |

**Welcome to the Style Manager!** From here you can:

**Create a Style**

- 1) Click the orange **New Survey Style** button
- 2) Choose a name for your style
- 3) Choose your style type - Standard, Smartphone or Tablet
- 4) Choose to make your style Public or Editable for other users

**Edit a Style**

- 1) Select a style from the list to preview
- 2) Click the **Edit** button at the top of the Preview window
- 3) Edit the attributes of your style and preview in real time

[>>Read our Style Guide for more tips](#)

The **Styles Manager** is where you create, import, and modify style templates to be applied to surveys and reports.

To add a new style, click the '**New Survey Style**' button.

**NOTE:** To apply a style to a particular survey, navigate to the Survey Manager, select a survey to open the survey's dashboard and select **Configure >> Appearance**

The screenshot shows the 'Survey Styles' management interface. On the left, a table lists various styles. The 'Chic Boutique' style is selected, and a red arrow points to the 'Edit' button in the top right of the table. On the right, the 'Chic Boutique' style is previewed, showing a pink header with the text 'Chic Boutique' and a decorative pattern. Below the header, there are fields for 'Survey Title', 'Page 1 of 4', and 'Question Text'.

| Style Name  | Style Type | Created By |
|---|------------|------------|
| <input type="checkbox"/> Beach                    | Standard   | admin      |
| <input type="checkbox"/> Bob's Bikes              | Standard   | admin      |
| <input checked="" type="checkbox"/> Chic Boutique | Standard   | admin      |
| <input type="checkbox"/> Company Logo             | Standard   | admin      |
| <input type="checkbox"/> Content Frame            | Standard   | admin      |
| <input type="checkbox"/> Green AZ Style           | Standard   | admin      |
| <input type="checkbox"/> Holiday Style            | Standard   | admin      |
| <input type="checkbox"/> Mobile                   | Smartphone | admin      |
| <input type="checkbox"/> Orange Sherbet           | Standard   | admin      |
| <input type="checkbox"/> Product Packaging        | Standard   | admin      |
| <input type="checkbox"/> Satisfaction Survey      | Standard   | admin      |

Chic Boutique

Edit Properties Copy Export Delete style

Preview

Chic Boutique

Survey Title

Page 1 of 4

Question Text

Question Description

Answer 1

Answer 2

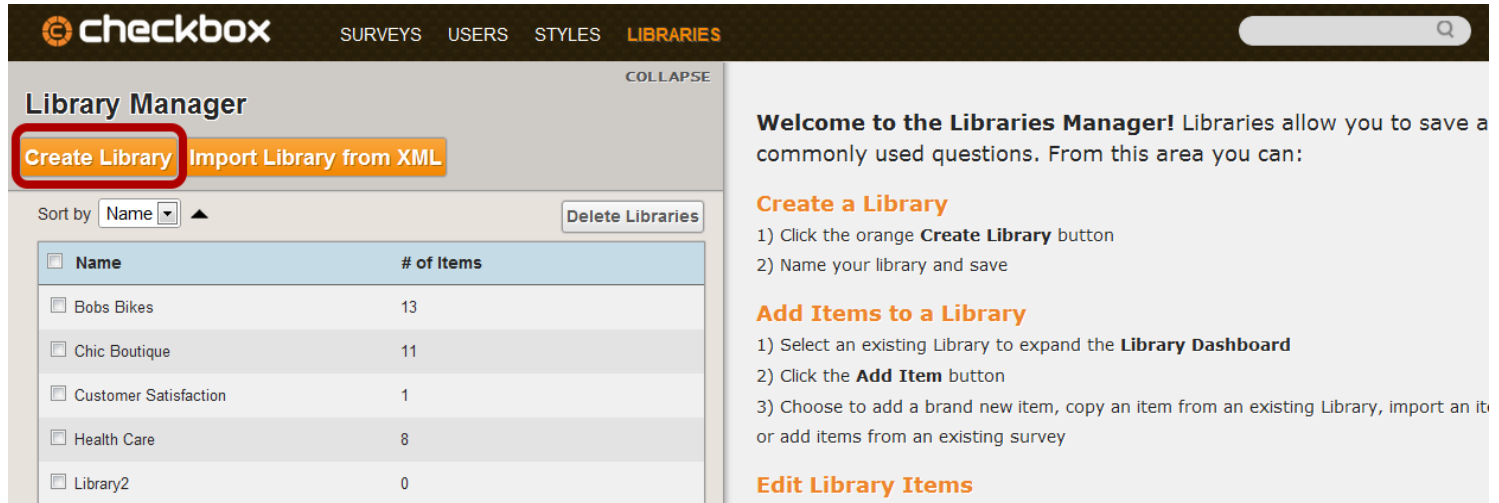
Answer 3

Error Message

**Preview** an existing style by clicking on it in the list on the left.

**Edit** an existing style by selecting the 'Edit' button above the preview screen on the right. Styles can be personalized by changing fonts, colors, borders, headers, footers, and more. They can be made public or kept private depending on the security options you choose.

## Libraries Manager



**checkbox** SURVEYS USERS STYLES LIBRARIES

Library Manager

**Create Library** Import Library from XML

Sort by Name ▲ Delete Libraries

| Name                  | # of Items |
|-----------------------|------------|
| Bobs Bikes            | 13         |
| Chic Boutique         | 11         |
| Customer Satisfaction | 1          |
| Health Care           | 8          |
| Library2              | 0          |

**Welcome to the Libraries Manager!** Libraries allow you to save a commonly used questions. From this area you can:

**Create a Library**

- 1) Click the orange **Create Library** button
- 2) Name your library and save

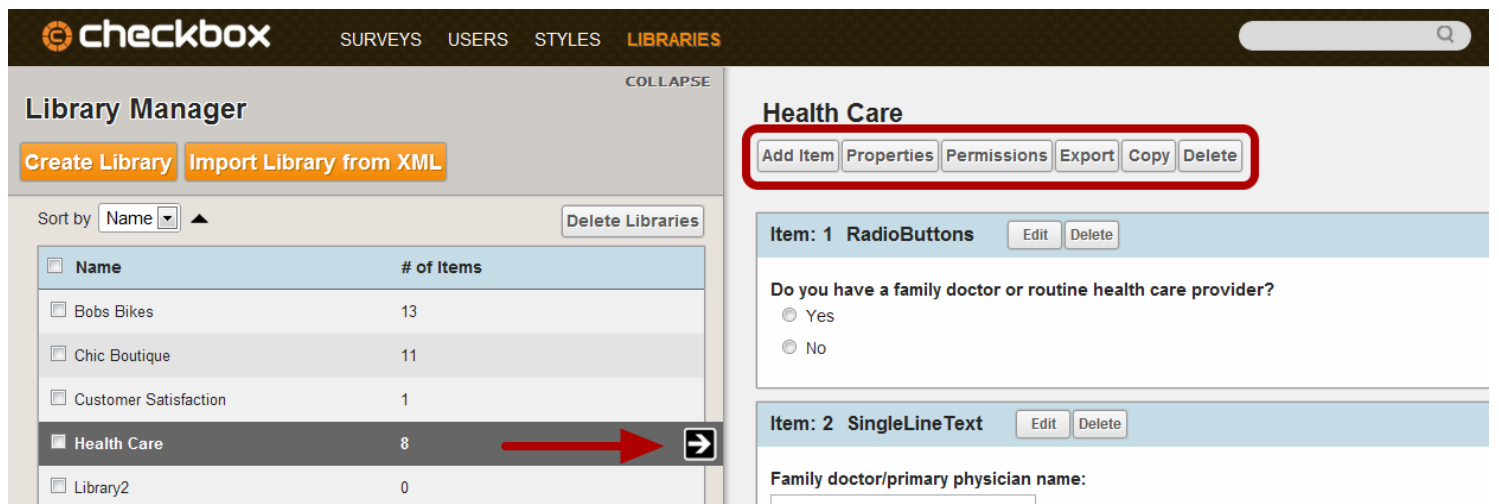
**Add Items to a Library**

- 1) Select an existing Library to expand the **Library Dashboard**
- 2) Click the **Add Item** button
- 3) Choose to add a brand new item, copy an item from an existing Library, import an item from an existing survey, or add items from an existing survey

**Edit Library Items**

Store frequently used question items in your **Libraries Manager** to draw from when creating surveys. Question libraries are a great way to save, share, and group questions.

To add a new library folder, click the '**Create Library**' button.



**checkbox** SURVEYS USERS STYLES LIBRARIES

Library Manager

**Create Library** Import Library from XML

Sort by Name ▲ Delete Libraries

| Name                  | # of Items |
|-----------------------|------------|
| Bobs Bikes            | 13         |
| Chic Boutique         | 11         |
| Customer Satisfaction | 1          |
| <b>Health Care</b>    | 8          |
| Library2              | 0          |

**Health Care**

**Add Item** Properties Permissions Export Copy Delete

**Item: 1 RadioButtons** Edit Delete

Do you have a family doctor or routine health care provider?

Yes

No

**Item: 2 SingleLineText** Edit Delete

Family doctor/primary physician name:

To **edit** an existing library, select the desired library folder and use the settings buttons at the top of the items list on the right. To add a new item to your library, select the '**Add Item**' button. From here you can choose to build a new survey item, or copy existing items from other libraries and surveys.

The screenshot shows the 'Library Manager' interface. On the left, a table lists libraries with columns for 'Name' and '# of Items'. The 'Health Care' library is selected, and a red arrow points to its 'Edit' button. On the right, the 'Health Care' survey item is displayed, with 'Edit' and 'Delete' buttons highlighted by red circles.

| Name                  | # of Items |
|-----------------------|------------|
| Bobs Bikes            | 13         |
| Chic Boutique         | 11         |
| Customer Satisfaction | 1          |
| Health Care           | 8          |
| Library2              | 0          |

To **edit** an existing library item, select the desired library folder and use the '**Edit**' buttons to modify individual survey items.

## Settings Manager

The screenshot shows the 'Settings Manager' interface. On the left, a sidebar lists settings categories: Survey settings, Report settings, User settings, System settings, Application text, and System Status. On the right, a 'Welcome to Checkbox Settings!' message is displayed. A red arrow points to the 'admin' user name and the gear icon in the top right corner.

Select the **COG icon** at the top right of the application window to enter the **Settings Manager**. From the Settings Manager you can configure Survey, Report, User, System and Application settings and defaults. Any changes you make in the Settings area will be applied across your entire Checkbox account for all users.

**CHECKBOX TIP:** Customize survey & validation text under **Application Text**

**CHECKBOX TIP:** Add more user attribute fields to user profiles under **User Settings**

Thank you for viewing this Checkbox User Guide. [Click here to return to Checkbox Resources](#).