

Checkbox 5 Permissions Guide

This document walks you through the process of configuring permissions within the Checkbox application.

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Checkbox Permissions

Permissions, also referred to within Checkbox as **Security**, control which access-controllable entities a user can create, edit, or view.

Specifically, permissions can be set on:

- Surveys
- Reports
- User Groups
- Libraries
- Folders
- Email Lists

Throughout this guide, the shorthand 'entity' will be used when discussing any of the above access-controllable Checkbox functions.

User Roles

✓ Username > ✓ Profile > **Roles** > Groups > Review > Finish

User roles
Select the roles you would like this user to have. You must select at least one role.

- System Administrator
- User Administrator
- Survey Administrator
- Respondent
- Report Viewer
- Report Administrator
- Survey Editor
- Group Administrator

CANCEL PREVIOUS NEXT

Another type of permission within Checkbox is the **User Role**. User Roles dictate which permission(s) can be assigned to a particular user. By default, a user has access to only the entities they have created, be that a survey, a report, a user group, etc. If you would like to grant a user access to an entity they did not create, the user will need to have the correct role(s) *and* have been granted permission(s) in the entity's security settings.

The following is a list of all user roles and the actions each role is capable of:

Systems Administrator: Can change the settings of the application and view/edit/respond to all items within Checkbox

User Administrator: Can create new users

Survey Administrator: Can create/edit/activate surveys

Respondent: Can respond to surveys

Report Viewer: Can view existing reports

Report Administrator: Can view reports and create new ones

Survey Editor: Can modify surveys

Group Administrator: Can assign users to groups

User Roles are configured when a new user is created and can be edited within the **User Manager** at any time by a System Administrator or User Administrator (User Admin can only modify users they created) . You can select one or more user role(s) for any given user, depending on the level of access you wish to grant them within Checkbox.

These roles are required in order to complete specific actions on a Checkbox entity. For example, if a particular user has been assigned the Report Viewer role but wishes to create a survey they would not be able to, because their role designation permits them to view reports only. That user would need to be assigned the Survey Administrator or System Administrator role in order to create a survey.

Basic Survey Security

The screenshot shows the 'Survey Manager' interface. On the left, a list of surveys includes 'Marketing Surveys (6)', 'Customer Feedback Style', 'Employee Satisfaction', and 'Registration Form'. A red arrow points to 'Employee Satisfaction'. On the right, the 'Employee Satisfaction' configuration page is open, with tabs for 'Status', 'Configure', 'Responses', 'Reports', and 'Invitations'. The 'Configure' tab is selected, and sub-tabs for 'ACTIVATION', 'APPEARANCE', 'PERMISSIONS', and 'EDIT CUSTOM TEXT' are visible. The 'PERMISSIONS' sub-tab is selected, showing a drop-down menu with 'Public' selected and a text box explaining that the survey has no access control.

Select a **Survey Permission Type** from the drop-down list to determine which type of respondent has access to your survey. Select your Survey Permission Type from the following options:

- **Public (Default):** Survey has no access control. Any respondent, including those not registered in Checkbox as users, will be allowed to complete this survey. Responses will be anonymous. By default, all surveys are set to Public upon creation.
- **Password Protected:** A survey-specific password will control access to this survey. Any respondent that knows the password may complete this survey. Responses will be anonymous.
- **Access List:** Only users specified in the access control list will be allowed to complete this survey. Users must log-in to Checkbox to take the survey and their user attributes will be linked to their responses. Select the "Respondents List" button (will appear once the Access

List option is selected) to add users to your survey access list (see above image).

- **All Registered Users:** Any user that can log into Checkbox and is assigned the respondent role will be able to complete this survey.
- **Invitation Only:** Only respondents whom have been invited via an email invitation sent by the Checkbox application will be able to respond to this survey.

To configure survey security:

1. From the **Survey Manager** page, select the survey you want to configure permissions for
2. Select **Configure** from the main Survey Dashboard menu
3. Select the **Permissions** tab

NOTE: This assumes you are the Survey Administrator for a survey that you have created or have the authority to change permissions.

CHECKBOX TIP: By setting your survey to 'Public' or 'Password Protected' you are not requiring your respondents to be registered Checkbox Users. This means that each response will be captured as an 'Anonymous Respondent'. If you would like to capture the user name and profile properties of your respondent, you will need to create an account for your user and set permissions for your survey to 'Access List' or 'All Registered Users'

Advanced Permissions

PERMISSIONS **ADVANCED OPTIONS**

Access List ▾

Respondents List

Only designated users or users that are in designated groups will be able to complete the survey. Users must login to Checkbox to take the survey and will be linked to their responses. This setting is most useful when you need to limit access to the survey to a particular group of respondents or you need to link responses to the respondents taking the survey.

Each Survey Permission Type changes the permissions of your survey for **Respondents** only. These security options do not configure any permissions for the **users** whom will have the ability to edit your survey. To add/remove survey access for survey editors or administrator, select the

Advanced Options button.

From the Advanced Options window you have the ability to view current user permissions, change default permissions, and add users and/or groups to a survey's **Access Control List (ACL)**. Many entities in Checkbox have an **Access Control List**. Users may only be added to a particular entity's ACL if their individual user role(s) correspond with that entity. For example Report Viewers, Report Administrators, and System Administrators can be added to a report ACL.

Permissions CLOSE

Access List Default Policy Add Users/Groups to Access List

Select an entity in the left hand list to see the current permissions for that entity in the right hand list. Select the permissions you would like to apply to the selected entity and click "SAVE CHANGES" to make the new permissions effective.

Filter list: +

Name	Delete
admin	

1

Ungroup permissions

- Administer Survey
- Analyze Data
- Edit/Take Survey
- Take Survey
- View Survey Responses

2

SAVE CHANGES

Access List

The SurveyAccess Control List allows you to control which users/respondents have permission to:

- Administer a specific survey
- Analyze response data for a survey
- Take or modify a survey

- Only respond to a survey
 - View survey responses
1. The **left** hand list displays users currently on the survey's access list. Select an entity on the left to display that user's actual permissions on the right side of the window.
 2. Select the permissions on the **right** hand list to apply to the selected entity on the left and click **Save Changes** to make the new permissions effective.

For example, if you needed to permit an additional Survey Editor to modify a particular survey you could grant them this access by adding them to the ACL and checking the "Edit/Take Survey" box.







NOTE: The permission options listed on the left are groups of permissions. To view all individual permission options, select Ungroup Permission at the top of the list.

Permissions CLOSE

Access List Default Policy Add Users/Groups to Access List



Entries in the right hand box are currently on the permission list. To add a new entry to the permission list, click the corresponding right arrow to move it to the right hand list. To remove an entry, click the corresponding left arrow in the right hand list.

Filter list: +

-  Email List
-  Everyone
-  Customer 1
-  Customer 2
-  iris@plant.com
-  oak@tree.com

1

Filter list: +

-  New Customers
-  admin

2

Add Users/Groups to Access List

On this window you can add and remove entities to the survey Access Control List.

1. The left hand box contains all available users/groups that could be added to the survey access list. Select an entity on the left to add it to the permission list.
2. Once a user/group is selected from the left hand box, it will move to the right hand box, which contains entities currently on the permission list.




NOTE: When adding a user group to an ACL, only users with user roles that correspond with that ACL entity will have access. Make sure all group members have the appropriate user role.

Permissions CLOSE

Access List Default Policy Add Users/Groups to Access List

Select an entity in the left hand list to see the current permissions for that entity in the right hand list. Select the permissions you would like to apply to the selected entity and click "SAVE CHANGES" to make the new permissions effective.

Filter list: +

Name	Delete
 New Customers	
 admin	

Ungroup permissions

- Administer Survey
- Analyze Data
- Edit/Take Survey
- Take Survey
- View Survey Responses

SAVE CHANGES

After adding a new user/group on the **Add Users/Groups to Access List tab**, move back to the **Access List tab**, you will see the new entity listed on the left hand box and can then set specific permissions on the right hand box.

Permissions

CLOSE

Access List

Default Policy

Add Users/Groups to Access List

Select the permissions you would like to apply to users who are not expressly on the permission list.

 Ungroup permissions Administer Survey Analyze Data Edit/Take Survey Take Survey View Survey Responses

SAVE CHANGES

Default Policy

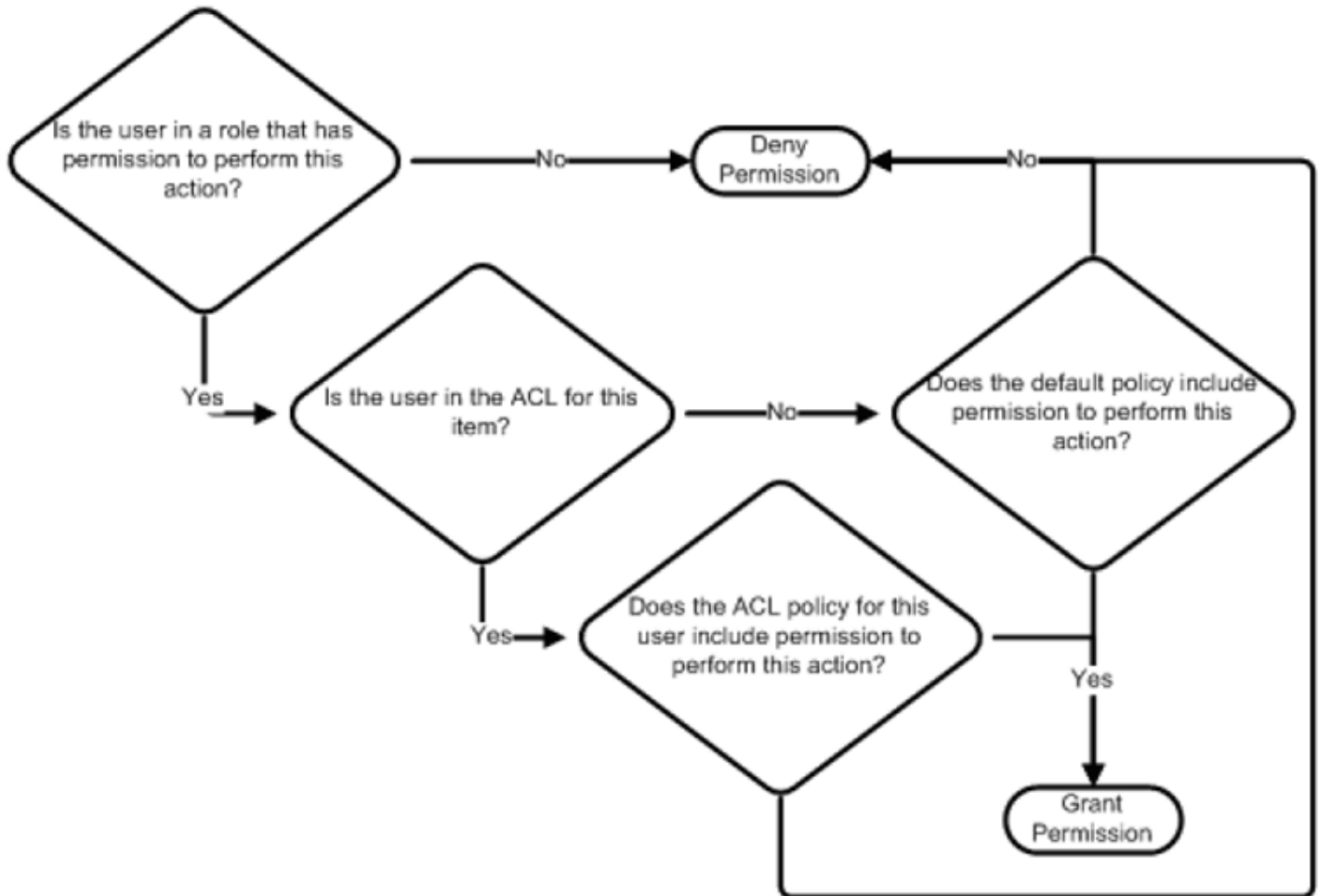
A survey's **Default Policy** is the permissions setting for all users not included on the survey Access Control List.

For example, if on the Access List tab you granted specific users permission to administer a survey, but want anyone *not* specified on the ACL to still be able to respond to the survey, set the Default Policy to 'Take Survey' (see image above).

NOTE: ACL permissions supersede any default policy.

NOTE: The permission options you see listed by default are groups of permissions. To view all individual permission options, select 'Ungroup Permissions' at the top of the list.

Permissions Diagram



Permissions can be configured for a number of different entities within Checkbox using the same principles illustrated under "Advanced Permissions." The above flow chart illustrates the process Checkbox uses to evaluate permissions.

From the diagram, the following key points about access control become clear:

1. An ACL policy cannot grant permission to a user whom is not in a role that also grants the corresponding permission. For example, users with a Respondent role only can only be added to the ACL of surveys and folders.
2. An ACL policy can deny permission to a user even if they have the correct role designation. For example, a user with a Report Viewer role must either be included on the report's ACL, or

the report has a Default Policy which permits non ACL access.

3. An ACL policy for a user or group can deny permission to that user or group even if the default policy grants that permission to every other user

Common Permissions Scenarios

The screenshot shows the 'Employee Satisfaction' survey configuration page. The 'Edit Survey' button is in the top left. Below it are tabs for 'Status', 'Configure', 'Responses', 'Reports', and 'Invitations'. Under the 'Configure' tab, there are sub-tabs for 'ACTIVATION', 'APPEARANCE', 'PERMISSIONS', and 'EDIT CUSTOM TEXT'. The 'PERMISSIONS' sub-tab is selected. In the 'PERMISSIONS' section, there is a dropdown menu currently set to 'Public' and a red-bordered button labeled 'ADVANCED OPTIONS'. To the right of the dropdown is a text box explaining the 'Public' setting: 'Survey has no access control, so any respondent that accesses the survey may complete it. Responses will be anonymous. This setting is most useful when you are interested in aggregate results of a survey and do not need to link responses to the respondents taking the survey.'

Add Users/Groups to a Survey ACL



After creating a new survey and setting your permission type to 'Public,' (anyone with the survey URL can take survey) you may wish to grant specific Checkbox users permission to take *and* edit your survey. This can be accomplished through the following steps:


1. Select **Advanced Options** from the Permissions area of the Survey Dashboard (Configure>>Permissions).

Permissions CLOSE

Access List | Default Policy | Add Users/Groups to Access List

Select an entity in the left hand list to see the current permissions for that entity in the right hand list. Select the permissions you would like to apply to the selected entity and click "SAVE CHANGES" to make the new permissions effective.

Name	Delete
 admin	

Filter list: 

Ungroup permissions

- Administer Survey
- Analyze Data
- Edit/Take Survey
- Take Survey
- View Survey Responses

SAVE CHANGES

This will open your survey's **ACL** (Access Control List). The **Access List** tab should appear by default, and you should see your user name in the left-hand box. If you are a System Administrator, when you click on your username you should see all of the permissions boxes pre-selected on the right-hand side of the window.

The screenshot shows the 'Permissions' dialog box with the 'Default Policy' tab selected. The dialog has a title bar with 'Permissions' and a 'CLOSE' button. Below the title bar are three tabs: 'Access List', 'Default Policy', and 'Add Users/Groups to Access List'. The main content area contains the instruction: 'Select the permissions you would like to apply to users who are not expressly on the permission list.' Below this is a list of permissions with checkboxes: 'Ungroup permissions', 'Administer Survey', 'Analyze Data', 'Edit/Take Survey', 'Take Survey' (checked), and 'View Survey Responses'. At the bottom of the list is an orange 'SAVE CHANGES' button.

If you select the Default Policy tab, 'Take Survey' should be the only permissions option pre-selected. This is because we set the survey permission type to Public. By default, anyone with the survey URL can take the survey.

The screenshot shows the 'Permissions' dialog box with the 'Add Users/Groups to Access List' tab selected. The dialog has a title bar with 'Permissions' and a 'CLOSE' button. Below the title bar are three tabs: 'Access List', 'Default Policy', and 'Add Users/Groups to Access List'. The main content area contains the instruction: 'Entries in the right hand box are currently on the permission list. To add a new entry to the permission list, click the corresponding right arrow to move it to the right hand list. To remove an entry, click the corresponding left arrow in the right hand list.' Below this are two boxes. The left box has a 'Filter list:' input field and a '+' icon, and contains a list of users and groups: 'Email List', 'Employees', 'Everyone', and 'user1'. The right box has a 'Filter list:' input field and a '+' icon, and contains a list of users: 'admin' and 'user2'.

2. To add a user or group to the survey access list, move to the **Add Users/Groups to Access List** tab. The left-hand box contains a list of all available users and groups from the User Manager. To add a user or group to the access list, simply select an entry from the list. Upon selection, the

user or group should automatically move to the left-hand box.

In the example above, we added user2 to the access list, because this particular user has a Survey Editor role designation. User1 has a Respondent role, therefore would not be able to edit our survey even if we added him to the access list.

Checkbox Tip: If you are unsure of a user's designated role(s), be sure to confirm within the User Manager before adding the user to the access list.

Permissions CLOSE

Access List | Default Policy | Add Users/Groups to Access List

Select an entity in the left hand list to see the current permissions for that entity in the right hand list. Select the permissions you would like to apply to the selected entity and click "SAVE CHANGES" to make the new permissions effective.

Filter list: +

Name	Delete
admin	
user2	➔

Ungroup permissions

- Administer Survey
- Analyze Data
- Edit/Take Survey
- Take Survey
- View Survey Responses

SAVE CHANGES

3. Return to the **Access List** tab to set additional permissions for the new access list member. Once on the Access List tab, select the newly added user to expand the permissions options in the right-hand box. If you want allow the user to edit the survey, check the box labeled '**Edit/Take Survey**' and **save** your changes.

4. Test your new permission configuration by logging in as the new ACL member and attempting to edit the survey.

The screenshot shows the Checkbox 5 User Manager interface. The 'User Groups' menu item is highlighted with a red box. The main content area displays a list of users with columns for 'User Name' and 'Email'. The user 'user3' is selected, and a right-pointing arrow icon is visible next to their row. The right-hand panel shows the profile for 'user3', including sections for 'Login Information', 'Profile Properties', and 'User Roles'. The 'User Roles' section shows 'Group Administrator'.

User Name	Email
admin	admin@checkbox.com
user1	user1@email.com
user2	user2@email.com
user3	user3@email.com
user4	user4@email.com

user3

Login Credentials | Profile Properties | User Roles | Group Memberships

Login Information

User Name : user3
Email : user3@email.com
Auth Type : CheckboxPasswordUser
Automatic Login : http://professionalservices.checkboxonline.com/Login.aspx?u=
Locked Out : Unlocked - Lock

Profile Properties

FirstName:
LastName:
CompanyName:

User Roles

Group Administrator

Add Users/Groups to a User Group ACL

By default only System Administrators are permitted to view user groups created by other users in Checkbox. If you wish to allow non System Administrators to view a groups they did not create, you will need to them to the ACL of that group. Once the desired members have been added to the group's ACL, you can then configure ACL permissions options to grant the new members the ability to edit, view or administer the group. Make sure the user(s) you add has a 'Group Administrator' user role (configured in user's profile).

In this example, user3 and user4 are Group Administrators (can assign users to groups). We will use the following steps to add these two users to the ACL of the 'Employees' user group, making it possible for them to administer this group moving forward:

1. Select **User Groups** from User Manager menu.

The screenshot shows the Checkbox 5 interface. The top navigation bar includes 'checkbox5', 'SURVEYS', 'USERS', 'STYLES', and 'LIBRARIES'. The main content area is divided into two panels. The left panel, titled 'User Groups', has tabs for 'Users', 'User Groups', and 'Email Lists'. It features an 'Add New Group' button, a 'Sort by' dropdown set to 'Group Name', and buttons for 'Delete Group(s)' and 'Copy Group(s)'. A table lists groups with columns for 'Group Name' and 'Member Count':

Group Name	Member Count
Employees	2

The right panel, titled 'Employees', has tabs for 'Properties', 'Add Members', 'Security', and 'Copy Group'. The 'Security' tab is highlighted with a red circle. Below the tabs is a 'Members' section with buttons for 'Remove Selected', 'Remove All Users from Group', and 'Delete All Group Members from Checkbox'. A table lists members with columns for 'User Name' and 'Email':

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

2. Select the **Employees** group from the left-hand list. Selecting the group will expand a dashboard on the right-hand side of the screen.





3. Select the **Security** option from the dashboard menu. A window will appear that closely resembles the surveyACL. Like the surveyACL, you will first see the Access List tab, which displays current ACL members.

Edit Security - Employees CLOSE




Access List Default Policy **Add Users/Groups to Access List**

Entries in the right hand box are currently on the permission list. To add a new entry to the permission list, click the corresponding right arrow to move it to the right hand list. To remove an entry, click the corresponding left arrow in the right hand list.

Filter list: +

-  Employees
-  Everyone
-  user1
-  user2

Filter list: +

-  admin
-  user3
-  user4

CLOSE PERMISSION EDITOR

4. To add a user/group to the ACL, move to the **Add Users/Groups to Access List** tab and select the entities you wish to add from the list in the left-hand box. Once selected, the entities will appear in the right-hand box.

Edit Security - Employees CLOSE

Access List | Default Policy | Add Users/Groups to Access List

Select an entity in the left hand list to see the current permissions for that entity in the right hand list. Select the permissions you would like to apply to the selected entity and click "SAVE CHANGES" to make the new permissions effective.

Name	Delete
admin	
user3	➔
user4	

Filter list: +

Ungroup permissions

- Group.Create
- Group.Delete
- Group.Edit
- Group.ManageUsers
- Group.View

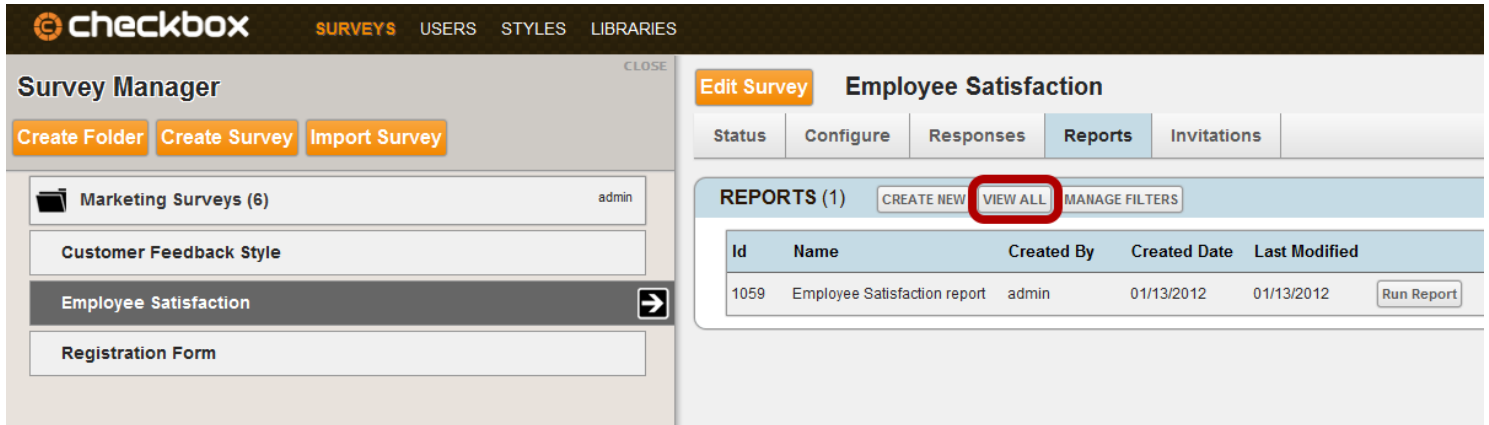
SAVE CHANGES

CLOSE PERMISSION EDITOR

5. Return to the **Access List** tab to configure the permissions for your new ACL members.

6. Select a member to expand the permissions options on the right. Expand the full list of permissions option by selecting **Ungroup Permissions**. In this example we want grant user3 and user4 permission to administer all available options except 'Delete'. After configuring the ACL, **save** your changes.

7. Test the new permissions configuration by logging in as the new ACL members and attempting to modify the group.



The screenshot shows the 'Survey Manager' interface for 'Employee Satisfaction'. On the left, there's a 'Survey Manager' sidebar with buttons for 'Create Folder', 'Create Survey', and 'Import Survey'. Below these are survey categories: 'Marketing Surveys (6)', 'Customer Feedback Style', 'Employee Satisfaction' (highlighted with a right arrow), and 'Registration Form'. The main area is titled 'Employee Satisfaction' and has tabs for 'Status', 'Configure', 'Responses', 'Reports', and 'Invitations'. The 'Reports' tab is active, showing a 'REPORTS (1)' section with buttons for 'CREATE NEW', 'VIEW ALL' (circled in red), and 'MANAGE FILTERS'. Below this is a table with columns: 'Id', 'Name', 'Created By', 'Created Date', and 'Last Modified'. The table contains one entry: '1059 Employee Satisfaction report' created by 'admin' on '01/13/2012'. A 'Run Report' button is next to the entry.

Add Users/Groups to a Report ACL

By default only System Administrators are permitted to view reports created by other users in Checkbox. If you wish to allow non System Administrators to view or modify a report they did not create, you will need to add them to the ACL for that report. Once the desired members have been added to the report ACL, you can then configure ACL permissions options to grant the new members the ability to edit, view or administer the report. Make sure the user(s) you add has a 'Report Viewer' or 'Report Administrator' user role (configured in user's profile).

In this example, we want to grant the 'Employees' user group access to view a report. Before editing the report ACL, make sure all of the users in the 'Employees' group have a Report Viewer or Report Administrator user role designation.

We will use the following steps to add this group to the 'Employee Satisfaction report' ACL:

1. Select **View All** button from the **Reports** area of the Survey Dashboard.

The screenshot shows the 'Reports for Employee Satisfaction' page. On the left, there is a table with columns: ID, Report Name, Created By, and Last Modified. The table contains one entry: ID 1059, Report Name 'Employee Satisfaction report', Created By 'admin', and Last Modified '01/13/2012 01:0:27 AM'. On the right, the 'Employee Satisfaction report' dashboard is displayed. It includes a URL, a menu with buttons for 'Edit Report', 'Run Report', 'Properties', 'Delete', 'Copy', 'Permissions', and 'Filters'. The 'Permissions' button is highlighted with a red circle. Below the menu is a 'Report Info' section with fields for 'Created By' (admin), 'Created Date' (01/13/2012 01:0:27 AM), and 'Last Updated' (01/13/2012 01:0:27 AM).

2. Select the **Employee Satisfaction Report** from the left-hand list. Selecting the report will expand a dashboard on the right-hand side of the screen.

3. Select the **Permissions** option from the dashboard menu on the right. An ACL window will appear. We will first see the Access List tab, which displays current ACL members.

The screenshot shows the 'Edit Security - Employee Satisfaction report' window. It has a 'CLOSE' button in the top right corner. The window has three tabs: 'Access List', 'Default Policy', and 'Add Users/Groups to Access List'. The 'Access List' tab is selected. Below the tabs, there is a text box with instructions: 'Entries in the right hand box are currently on the permission list. To add a new entry to the permission list, click the corresponding right arrow to move it to the right hand list. To remove an entry, click the corresponding left arrow in the right hand list.' Below this text are two filter lists. The left filter list is titled 'Filter list:' and contains a search box and a '+' button. It lists five entries: 'Everyone', 'user1', 'user2', 'user3', and 'user4'. The right filter list is also titled 'Filter list:' and contains a search box and a '+' button. It lists one entry: 'Employees'. At the bottom of the window, there is a red button labeled 'CLOSE PERMISSION EDITOR'.

4. To add a user or group to the report access list, move to the **Add Users/Groups to Access List** tab. The left-hand box contains a list of all available users and groups from the User Manager. To add a user or group to the access list, simply select an entry from the list. Upon selection, the

user or group should automatically move to the left-hand box. In this example we have selected the 'Employees' group.

Edit Security - Employee Satisfaction report CLOSE

Access List | Default Policy | Add Users/Groups to Access List

Select an entity in the left hand list to see the current permissions for that entity in the right hand list. Select the permissions you would like to apply to the selected entity and click "SAVE CHANGES" to make the new permissions effective.

Filter list: +

Name	Delete
Employees	
admin	

Ungroup permissions

- Administer Report
- Edit Report
- View Report ←

SAVE CHANGES

CLOSE PERMISSION EDITOR

5. Return to the **Access List** tab to configure the permissions for our new ACL user group.

6. Select the newly added group to expand the permissions options on the right. The options selected here will apply to all group members. In this example we want grant the 'Employees' group permission to **view** the report only, so we will select 'View Report' under the permissions options list. After configuring the ACL we will **save** our changes.

Edit Security - Employee Satisfaction report CLOSE

Access List **Default Policy** Add Users/Groups to Access List

Select the permissions you would like to apply to users who are not expressly on the permission list.
Select the permissions you would like to apply to users who are not expressly on the permission list.

Ungroup permissions

Administer Report

Edit Report

View Report

SAVE CHANGES

CLOSE PERMISSION EDITOR

7. Before we leave the ACL editor, we want to make sure no one other than the group we specified ('Employees') and the ourselves ('admin') can access this report. We will move to the **Default Policy** tab to make sure none of the permissions options are selected and **save** our changes.

8. Test the new permissions configuration by logging in as the new ACL members and attempting to modify the group.



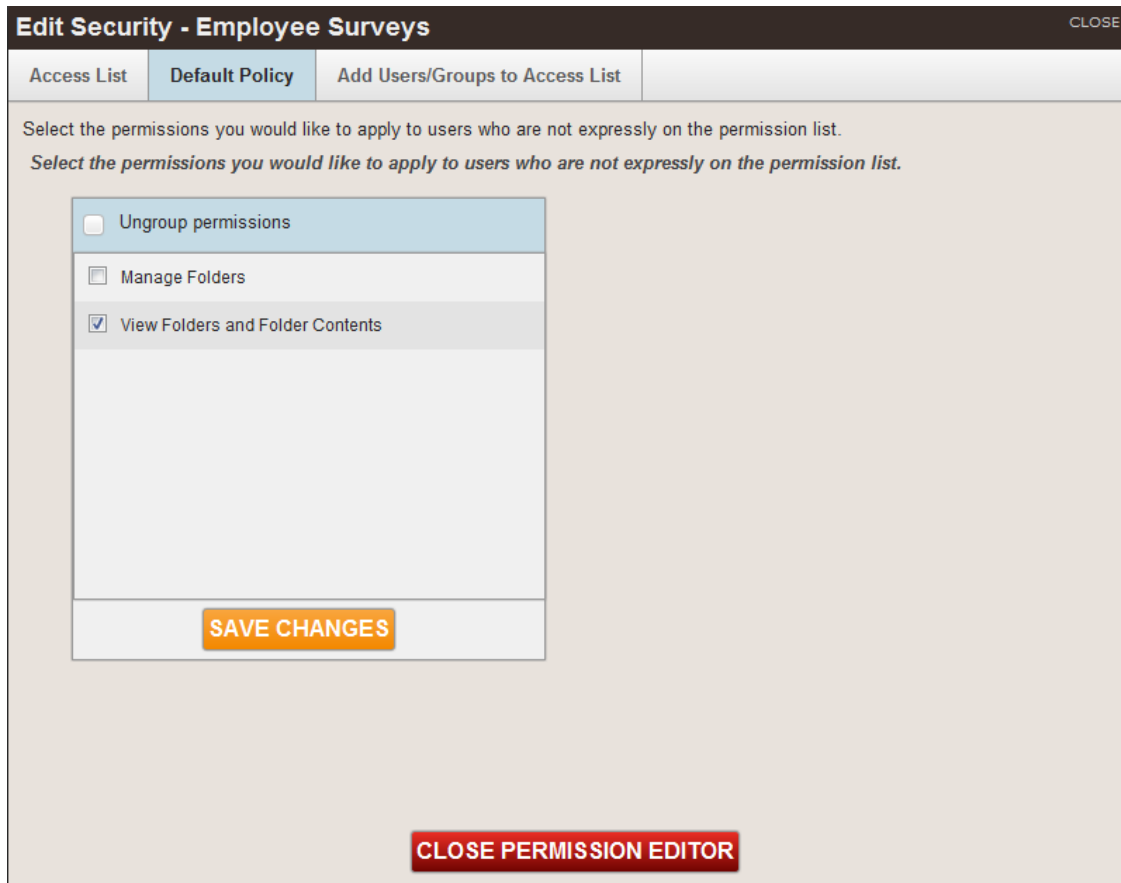
Configure Permissions of a Folder to Allow non-ACL Access

Every survey folder within Checkbox contains its own access control list (ACL). Only Survey Editors, Survey Administrators, and System Administrators can access survey folders. Only the creator of the folder or a System Administrator has the ability to grant access to the folder to other users.

NOTE: Permissions of a folder DO NOT propagate down to survey listed inside a folder

In this example we will change the default policy of a folder to allow non-ACL Access to any user with a Survey Editor or Survey Administrator user designation. Use the the following steps to change the default permissions of a folder:

1. From the **Survey Manager**, select the **folder** you wish to modify permissions for.
2. Select the '**Security**' option to expand the folder ACL. We will first see the Access List tab, which displays current ACL members.



3. Move to the **Default Policy** tab. By default, all permissions options should be un-checked.

4. We wish to grant all users (with either a Survey Editor or Survey Administrator role) not specified on the Access List tab, the ability to view the contents of this folder, therefore we will select the option to **'View Folders and Folder Contents'** and save our changes.

5. Test the new permissions configuration by logging in as a Survey Editor or Survey Administrator and attempting to open the folder.

NOTE: You should only be able to see surveys you have been granted permission to access as dictated by the survey ACL configuration.

Response Options & Limits

Edit Survey

Customer Feedback Survey

Status

Configure

Responses

Reports

Invitations

Launch

Preview

Test

Copy/Move

Export

Delete

LINKS

<http://beta.checkbox.com/Survey.aspx?s=78d463f022a8471e858f1abf81f74676>

<http://beta.checkbox.com/customerfeedback.aspx>

INFORMATION

Created By: admin

Last Updated: 12/28/2011 03:10 PM

Scored:

Locked:

Anonymize Responses:

ACTIVATION (OPEN TO RESPONDENTS)

Active: <input checked="" type="checkbox"/>	Allow 'Back' Button: <input checked="" type="checkbox"/>
Total response limit: <input type="text" value="100"/>	Allow respondents to edit previously completed responses: <input type="checkbox"/>
Per Respondent response limit: <input type="text" value="1"/>	Allow respondents to stop and resume their response later: <input type="checkbox"/>

Resume & Edit Options

Set respondent resume and edit options in the **Survey Dashboard** under **Status >> Activation**. You will see the following options:

- **Active:** When checked, survey is live and collecting responses
- **Total Response Limit:** Number of responses that can be submitted before survey closes to responses

- **Per Respondent Response Limit:** Number of responses that can be submitted by a unique respondent
- **Allow 'Back' Button:** When checked, respondents may move backward in a survey to modify responses prior to survey submission
- **Allow Respondents to Edit Previously Completed Responses:** When checked, respondents have the ability to return to a previously submitted survey and modify responses
- **Allow Respondents to Stop and Resume their Response Later:** When checked, respondents may save and exit a survey before submission and return to the saved location at a later date to complete the survey

Edit Survey Customer Feedback Survey

Status **Configure** Responses Reports Invitations

ACTIVATION APPEARANCE PERMISSIONS EDIT CUSTOM TEXT

ACTIVATION (OPEN TO RESPONDENTS)

Active:

Start Date: No Restriction

End Date: No Restriction

Set Response Time frame

Set a **Start and End date** in which responses may be collected in the **Survey Dashboard** under **Configure>>Activation**. Once the End date is reached, respondents will no longer have access to the survey.

*NOTE: Survey must be **Active** prior to start date.*

Permissions Review

Key Points

- Checkbox allows you to set permissions on **Surveys, Folders, Reports, User Groups, Libraries** and **Email Lists**.

- Checkbox allows you to set different access **roles** for individual users within Checkbox.
- Being assigned a user role does not in of itself grant a user access to a Checkbox entity. Being a member of a role simply controls **which permission can be granted** to a given user.
- **Survey Permissions** can be set in three different places (Survey Security, Access Control List and Default Policy within the Access Control List) .
- The **System Administrator** has rights over all entities of Checkbox and does not need to be configured on any ACL or security page. When testing surveys for your respondents DO NOT use the System Administrator account since permissions will be superseded and you will not have a proper representation of how your survey will behave.
- If you configure the permissions of your survey correctly but a user still can not view/edit it, be sure to double check your folder permissions to confirm you have set those permissions as well.

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