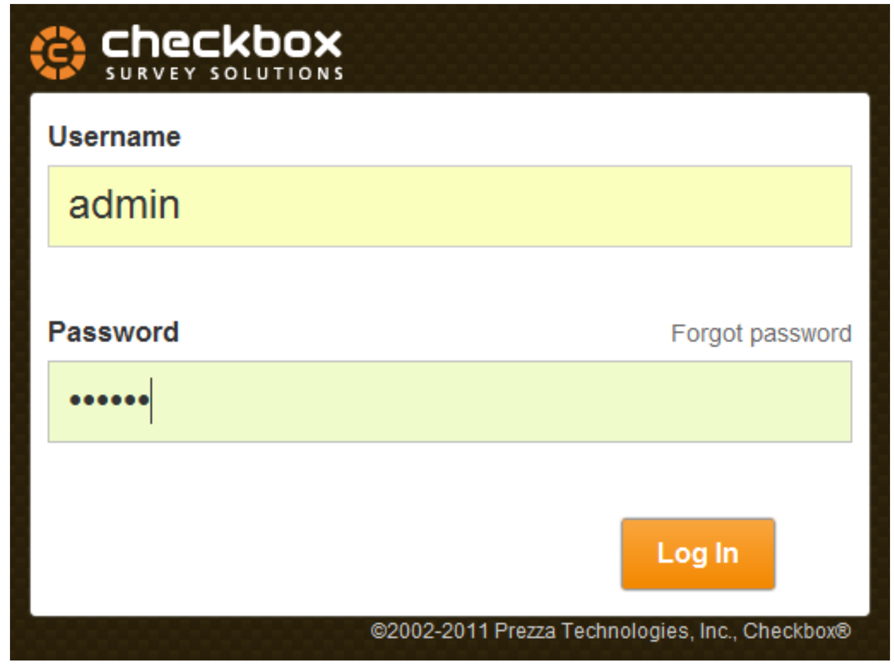
Checkbox 5 - Quick Start Guide

This How-To Guide provides an overview of the steps taken to create, deploy, and analyze a simple survey within Checkbox 5.

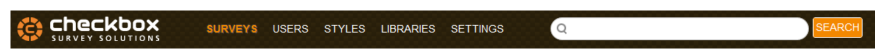
Contents:

Log-In

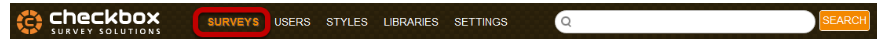
Log into Checkbox by entering first your **Username**, then your **Password**. If you forgot your password, select the "Forgot password?" link for assistance. Once your information is entered select the **Login** button to enter Checkbox.



When you first login to Checkbox Survey, you will see some or all of the above menu options depending on which version you are using (Current Release, Private Demo or Public Demo) and the roles attached to the current user account you are using.

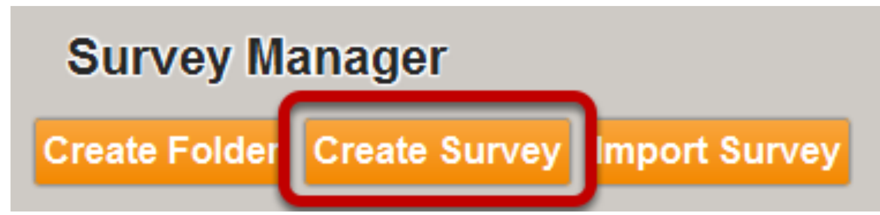


Create a Simple Survey



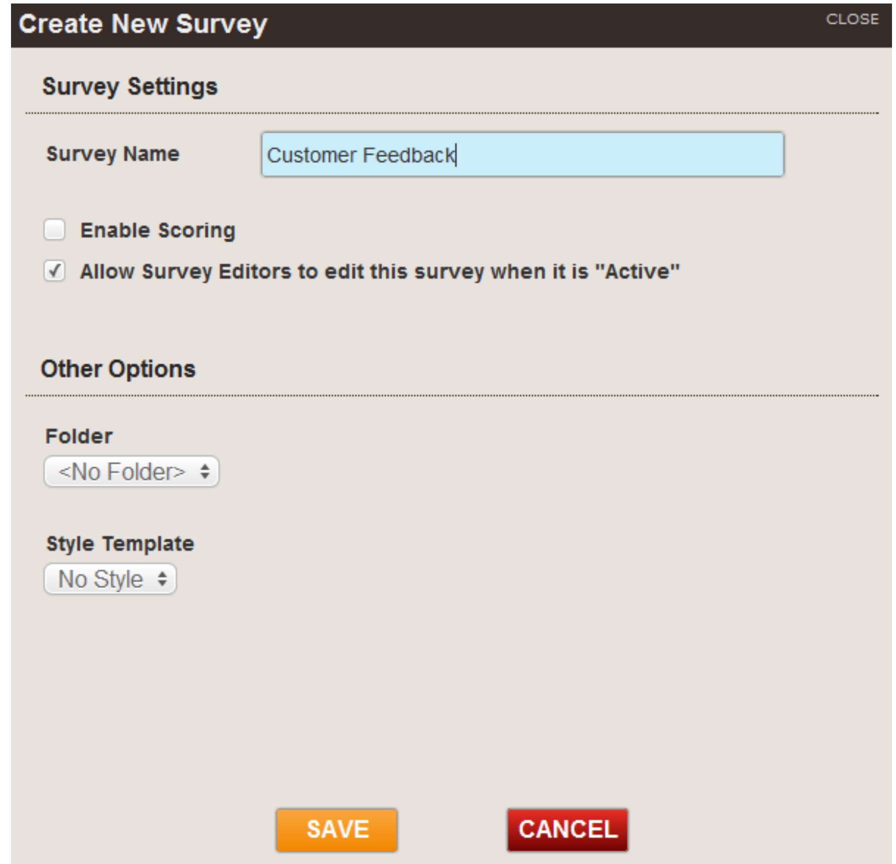
To create a survey you must first visit the **Survey Manager** page. This can be completed by selecting the **SURVEYS** text on the top menu of your application.

After navigating to the Survey Manager, select the **Create Survey** button.



Configuring Basic Survey Properties:

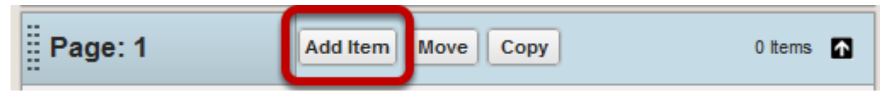
Configure Survey Name, Scoring and Editing Options, Folder and Style. In this example we set the survey name as 'Example Survey Name' and the Style of the survey to 'Ocean'. Select **SAVE** to save your changes.



Once saved, the **Survey Editor** screen above will appear. All new surveys are pre-populated with the three rows above: Hidden Items, Page 1, and Completion Events. These rows represent your current survey pages. As you add more pages and items to your survey this section will expand and grow. Use the down arrows on

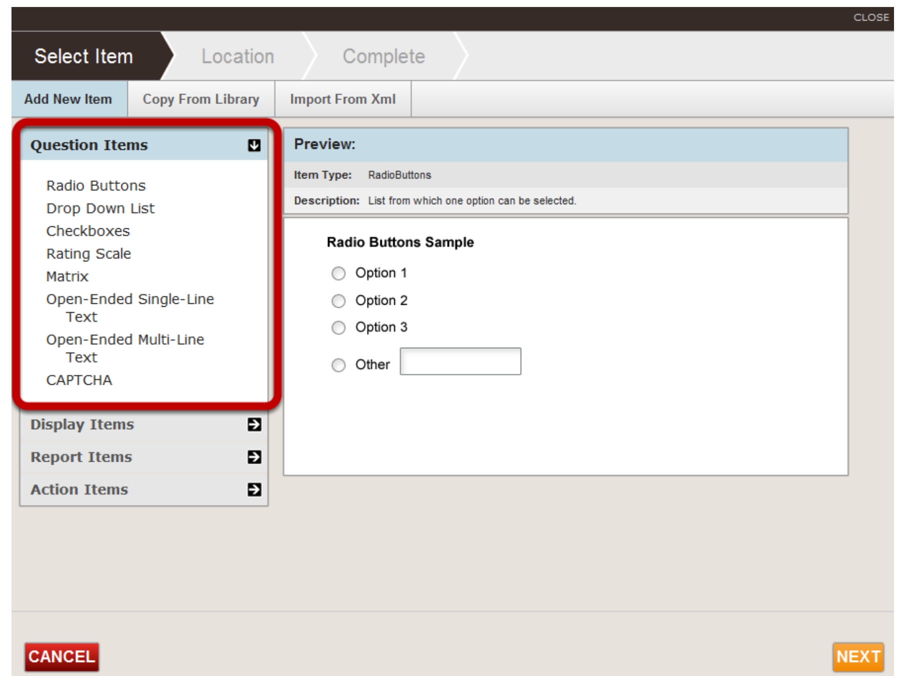
the right hand side to expand each page.

Add Survey Item:



Expand Page 1. Once expanded you will see three page options appear: Add Items, Move, and Copy. Select **Add Item** to select your first survey item.

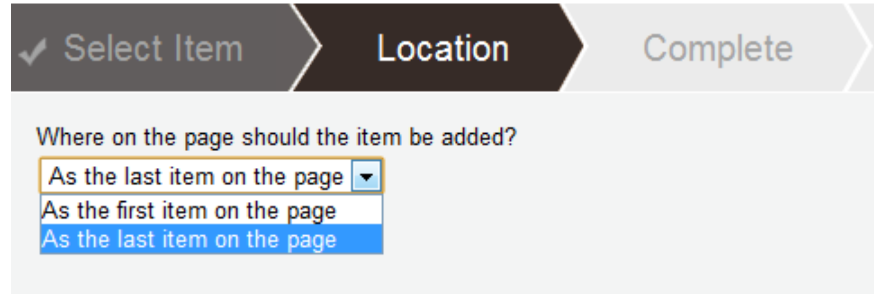
Once you select **Add Item** you will be presented with a list of Survey Items. Choose from Question Items, Display Items, Report Items, and Action Items.



For this example, select the **Radio Button** Question Item. A preview of the item will appear to the left of the window.

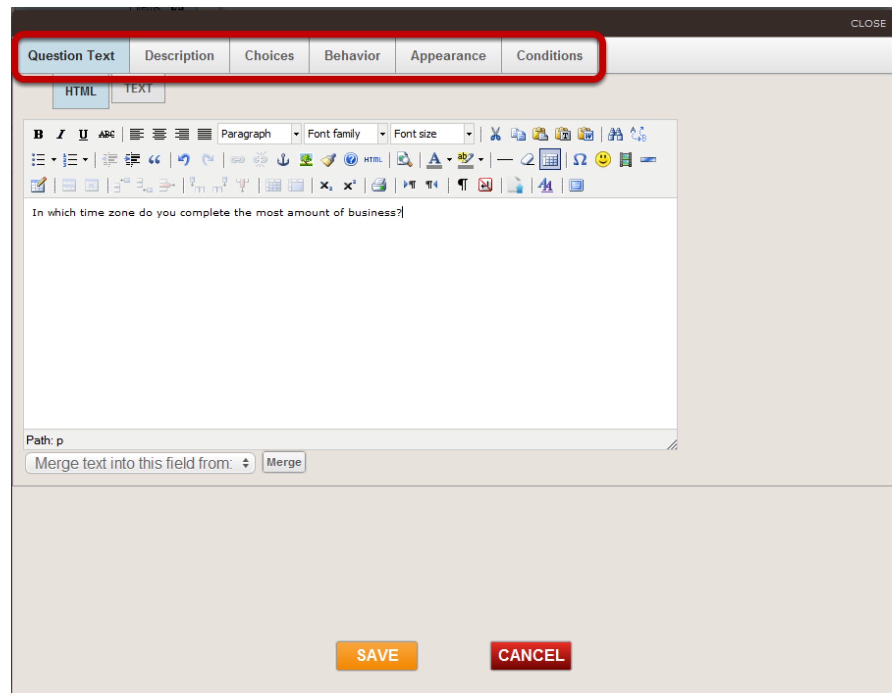
Select the **NEXT** button to continue.

Determine where you would like your item displayed on the page using the drop-down options. If this is the only item on the page, you can leave the default selected and select. Once you have added several items to a survey page this option will allow you to position new item before, after, or between existing items on a page.



Select the **FINISH** button to continue.

After selecting the item position on the survey page you are brought to the **Item Editor** window. Editor options vary depending on item type.



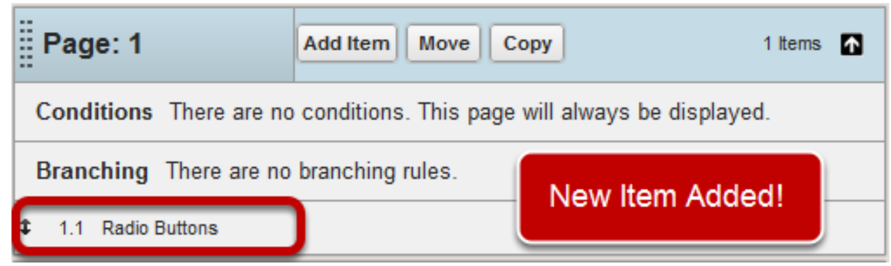
Go through each tab in the editor and update as necessary.

Select the **SAVE** button to save your item configuration. Once saved, you may return to the editor tabs at any time to make changes.

NOTE: Checkbox will automatically save your changes as you move from tab to tab. You do not need to select SAVE until all item configurations are complete.

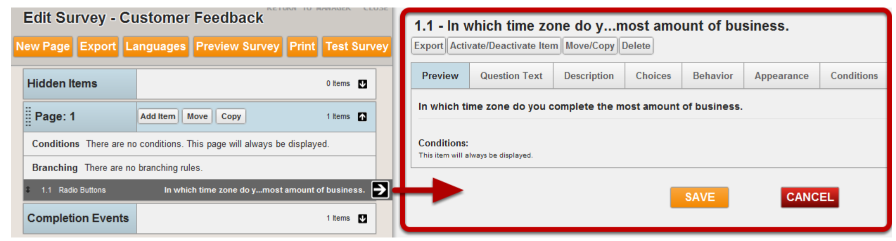
Your survey now contains the newly added Radio Button Item.

NOTE: The numbers to the left of the question type indicate the page number, followed by the item number on that page.



Edit Survey Item:

If you wish to edit an item after adding it to a survey, select the item to expand an **Item Editor** on the right side of the screen. Go through each tab in the Item Editor and update as necessary.

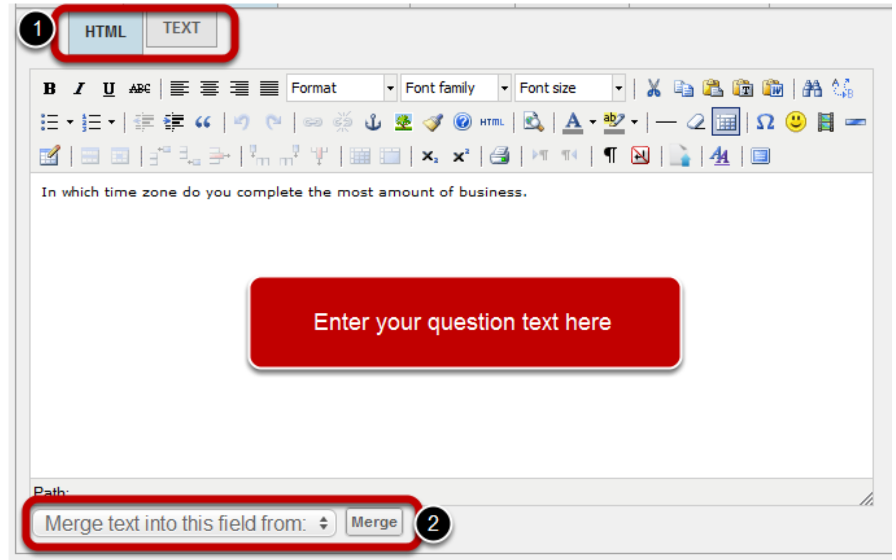


NOTE: Checkbox will automatically save your changes as you move from tab to tab. You do not need to select SAVE until all item configurations are complete.

Question Text:

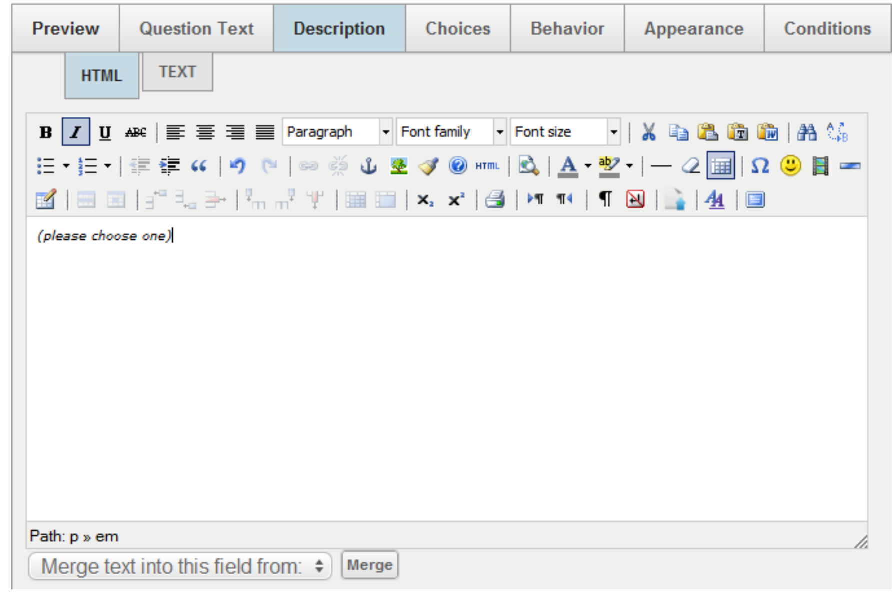
1. **Question Text** may be configured using either HTML or Text views.

2. Use the **Merge** feature to merge in answers to previous questions, user attributes, or response data.



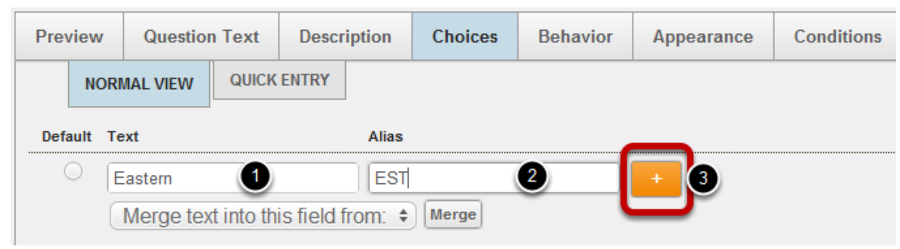
Description Text:

Description Text acts as subtext for the question text. It will appear below the question text in your survey. The text editor for Description Text offers the same features as the Question Text editor.



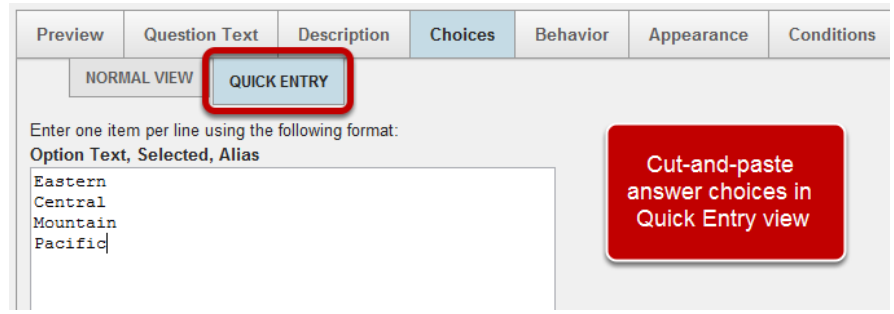
Add answer options under the **Choices** tab.

1. Enter your first answer option in the text field provided. Use the Merge feature to merge in previous answers, user attributes, or response data.
2. Add an alias if necessary.
3. Select the "**+**" icon to save your first Choice.

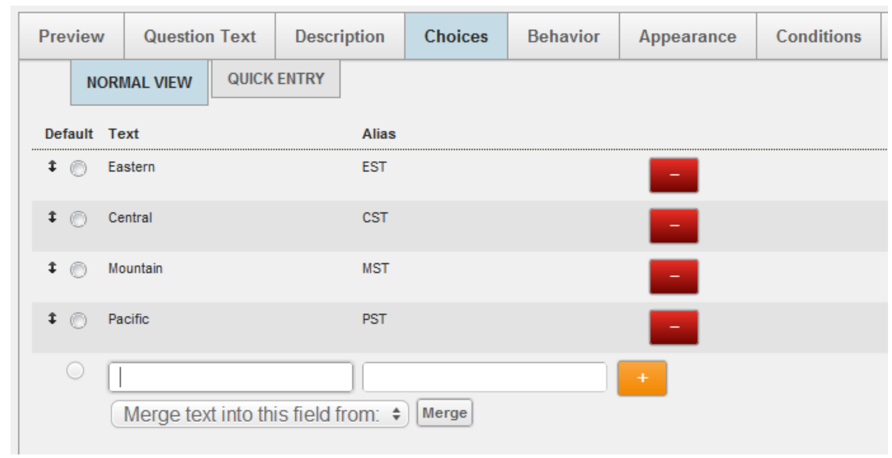


CHECKBOX TIP: What are Aliases? An alias is an alternate (most often abbreviated) version of the question text. Setting aliases can be useful when reviewing exported responses or building graphs/reporting items.

Checkbox default to "Normal View" for answer choice entry. If you have a text file or long list of answer options to enter, you can choose to use the "Quick Entry" view to cut-and-paste choices into your survey item.

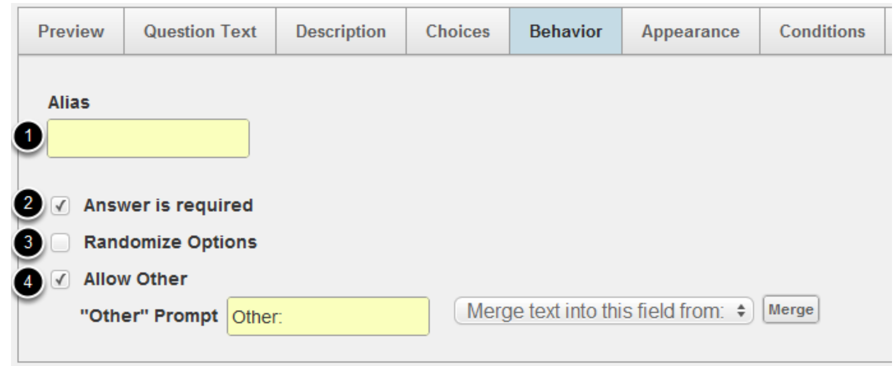


Once you have now added all of the available options to your question, move on to a different question item feature tab.



The **Behavior** tab allows you to:

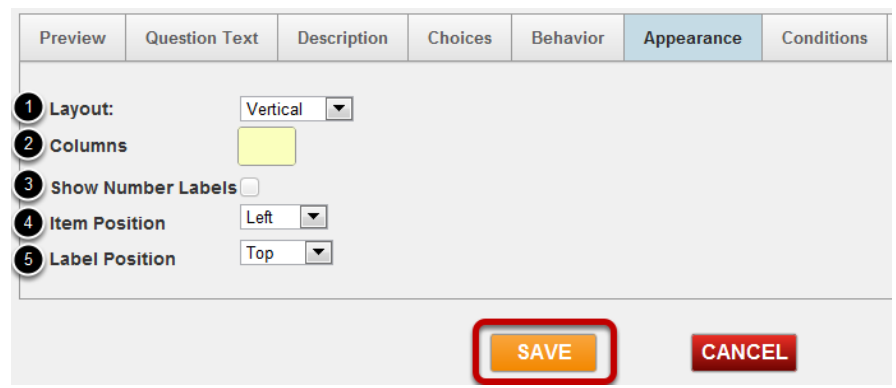
1. Set a **Global Question Alias**
2. Mark your item as **Required.** Enabling this option will insert an astrisk/star to the left of the question text, indicating to the respondent that an answer is required.
3**. Randomize** the response options
4. Enable the **"Other"** options, which allows respondents to enter their own answer option instead of selecting one of the ones you provided.



NOTE: The Behavior and Appearance options vary depending on the type of survey item you are editing.

The **Appearance** tab allows you to:

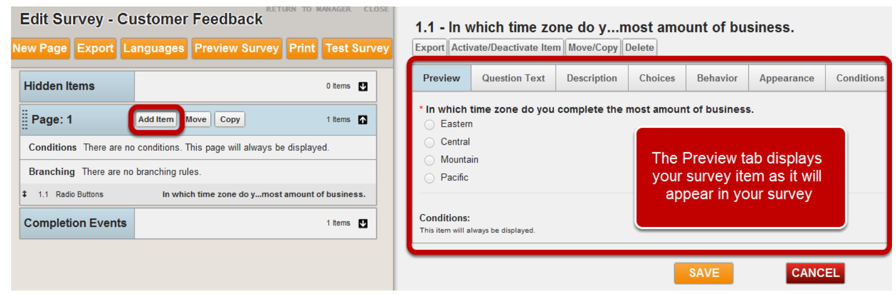
1. Change the **layout** of your answer choices from Vertical (column) to Horizontal (row).
2. Display your answer choices in multiple **columns**.
3. Show **number labels**, which will display to the left of the answer choices.
4. Set **Item Position**, which is the location of the survey item/question on the page (left/right/center).
5. Set **Label Position** of the question item, which is the location of the question text in relation to your answer choices (top/bottom/left/right).



The **Conditions** tab allows you to apply conditions to this Question Item. *See the [Checkbox 5 Conditions and Branching Guide](#) for more information on Conditions.*

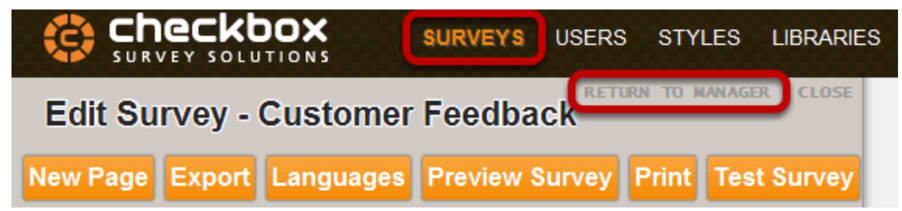
When you have navigated through each tab and are happy with your selections, select **SAVE** to save your changes.

You have added and edited your first Survey Item! You can add and experiment with a few more Survey Items by clicking **Add Item** again and completing the previous steps.

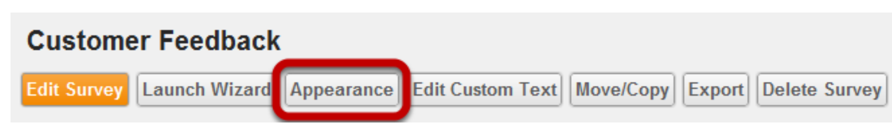


Add/Change Style

To change or add a custom style to your survey you will need to return to the **Survey Manager Dashboard.** You can either select the "Return to Manager" button or select the SURVEYS heading from the top menu to return to the Survey Manager.



Select the **Appearance** button on the Survey Manager Dashboard. Awindow will appear allowing you to select a survey style and configure additional appearance options.

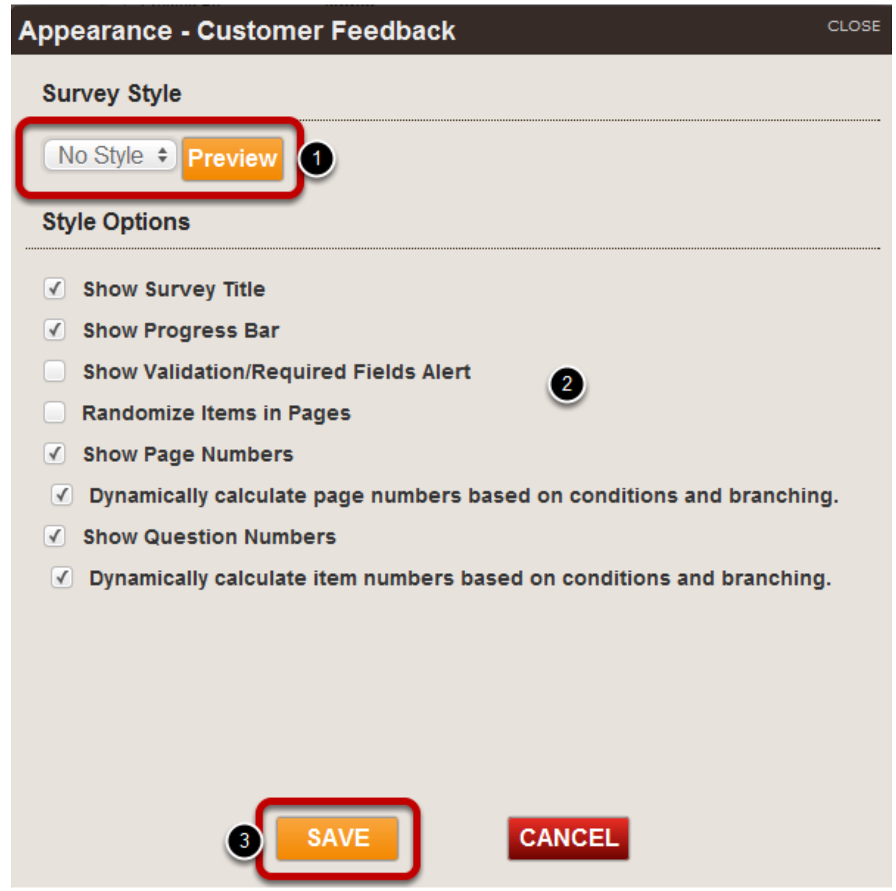


From the Appearance Editor:

1. Choose a **Survey Style** from the available drop-down list. Select the 'Preview' button to preview the selected style.
2. Select desired **Style Options** by checking the corresponding boxes.
3. Select **SAVE** to save your changes and close the window.

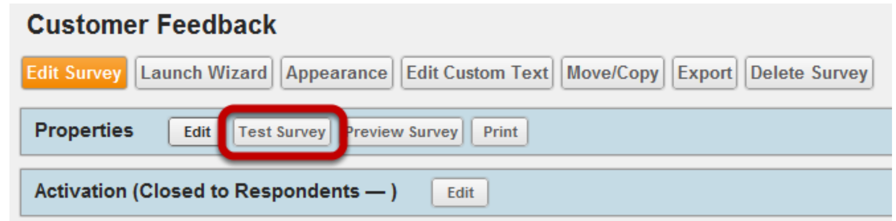
CHECKBOX TIP: If you included any conditioning or branching logic in your survey and wish to display page or question numbers, be sure to also select the option to "Dynamically calculate numbers based on conditions and branching"

NOTE: New Survey Style templates are created in the ***Styles Manager****. See the Checkbox 5 Survey Style Guide for more information*



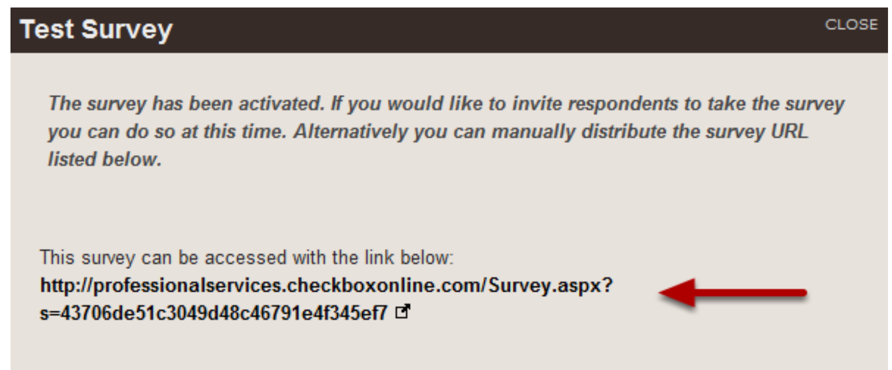
How to Publish a Survey

Now that you have created a survey, you will want people to complete it. Before you deploy your survey to respondents you will want to first 'test' and then 'activate' your survey.



Using the survey you just created select **Test Survey** from the top menu bar in the Survey Manager Dashboard

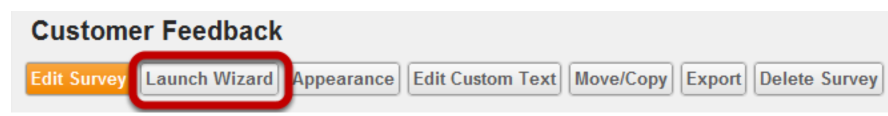
Selecting Test Survey will open a pop-up window that contains the **Test Survey URL.** Select this URL and test the functionality, as well as the look and feel of your survey. These responses will be saved as 'Test Responses' under the **Responses** menu and can be deleted at a later date before any analysis is required.



NOTE: Before sending out a survey, it is a good idea to send this 'test' survey link to a group of internal employees so that any spelling errors or grammatical mistakes are identified by someone other than the survey creator.

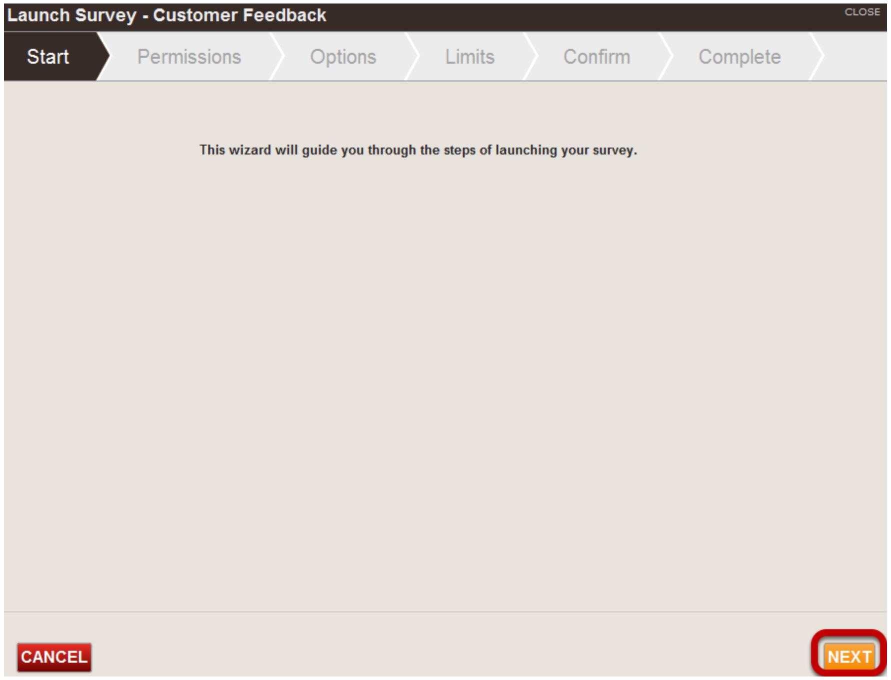
Launch Survey

Select the **Launch Wizard** button located on the Survey Manager Dashboard menu to begin the survey launch process. From this wizard you will configure survey permissions, response options, and response limitations. At the end of the Launch Wizard your survey will be activated and ready for deployment.



NOTE: Permissions and Activation settings can also be configured manually from the corresponding Survey Manager Dashboard menus.

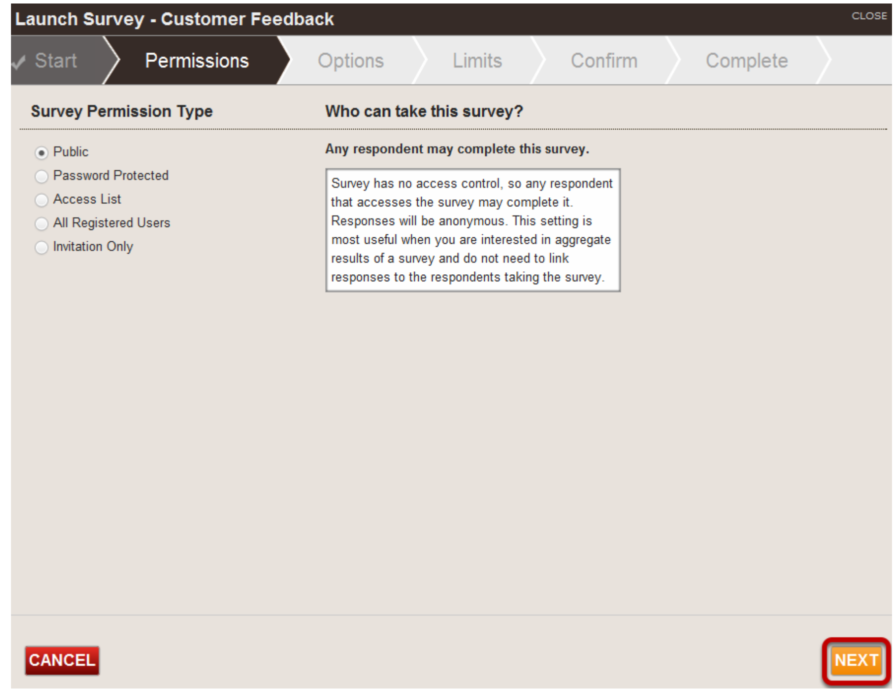
After selecting the **Launch Wizard** button a window will appear. Select **NEXT** to skip to the Permissions step.



Survey Permissions Types allow you to control whom has **access** to your survey and determine whether respondents will be captured as "Anonymous" or "Known." When you select a Survey Permission Type, an explanation the permission type will appear on the right side of the window.

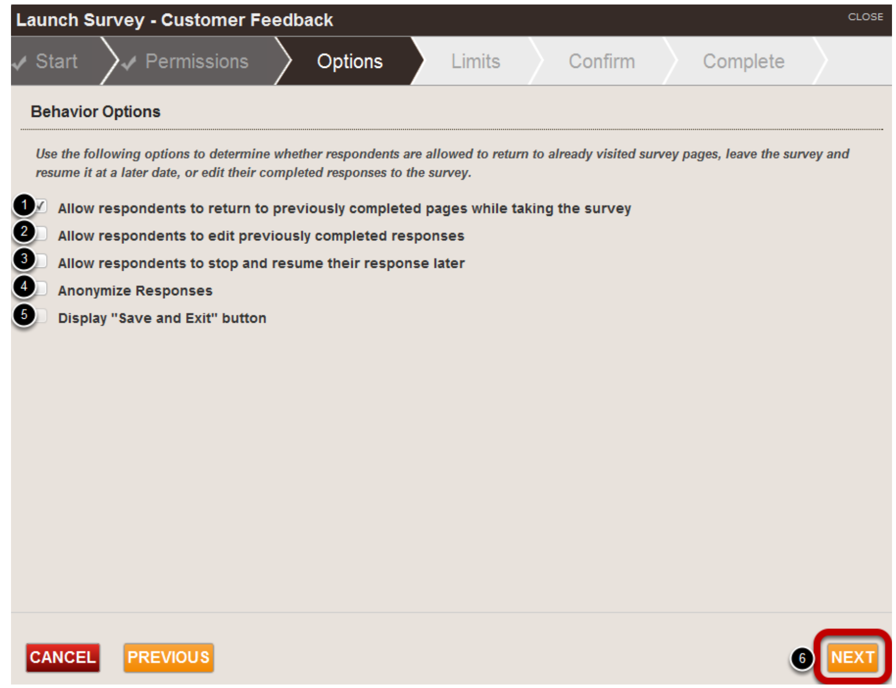
When you are satisfied with your permissions settings, select **NEXT** to continue to Response Options.

For more information on permissions view the Checkbox 5 Permissions Guide.



Under **Response Options** you have the ability to:

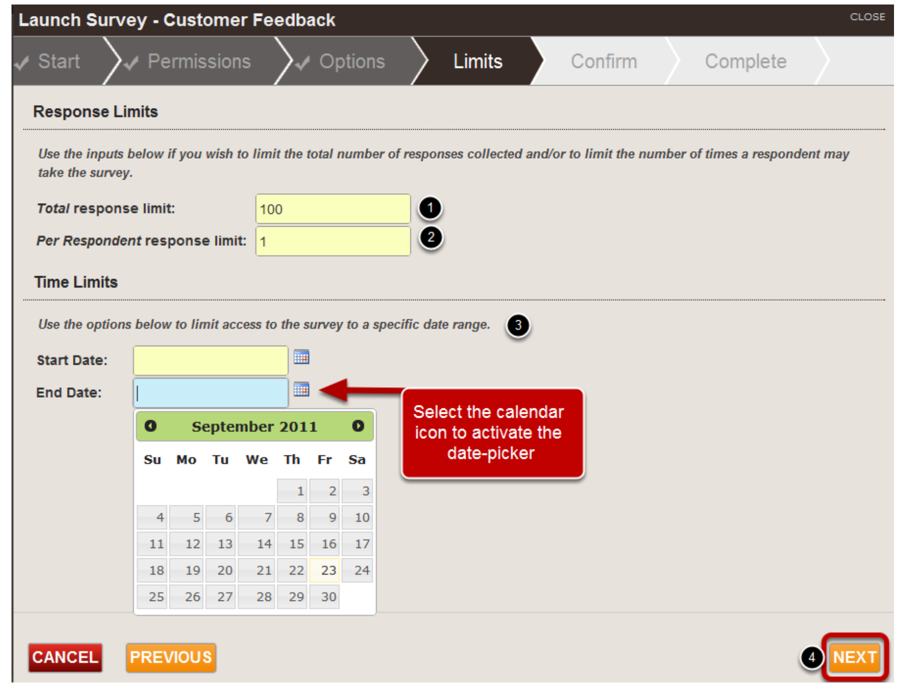
1. Allow respondents to return to previously completed pages while taking the survey. Enabling this option inserts a "back" button so that respondents can move backward in a survey prior to submission.
2. Allow respondents to edit previously completed responses. Enabling this option means that respondents will have access to their survey response after initial submission.
3. Allow respondents to stop and resume their response at a later date. This means that a respondent can save and exit the survey before submitting it and return later to complete it.
4. Anonymize responses, which means that all respondents will be captured as anonymous regardless of whether or not they are registered Checkbox users.
5. Display a "Save and Exit" button. If you enabled the option to allow respondents to stop and resume their survey, select this option to save their survey.
6. Select **NEXT** to save your changes and continue.



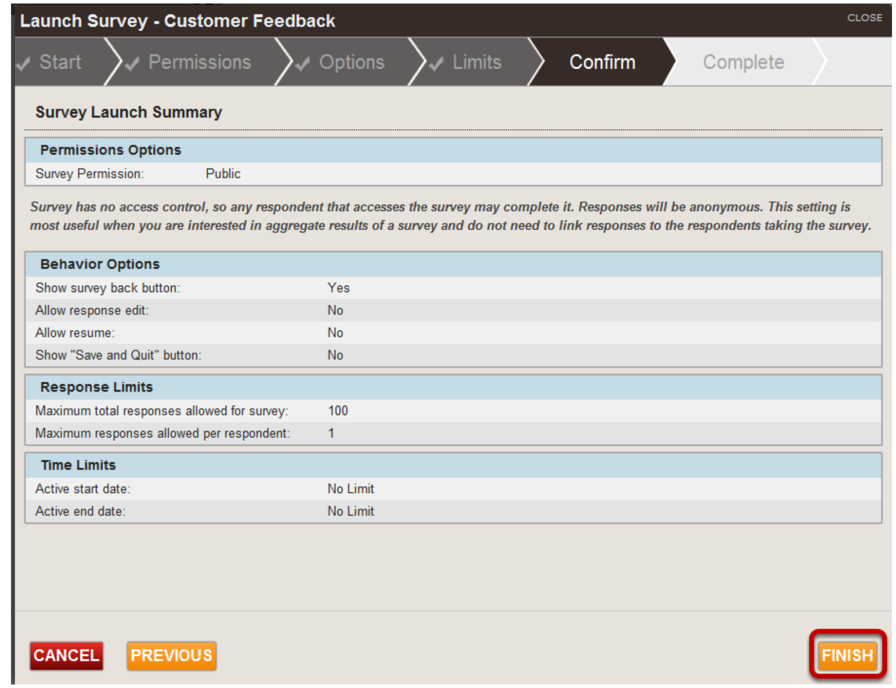
checkbox 5 how-to guide

Under **Response Limits** you have the ability to:

1. Set the total response limit for a particular survey. If the limit is reached, potential respondents will be unable to complete the survey.
2. Limit the number of responses per respondent. You can only limit the total number of responses per respondent for registered Checkbox users.
3. Set an access start and end date. A survey must be set to active prior to the access start date.
4. Select **NEXT** to save and continue.



Confirm your settings and select FINISH to reach the final page of the **Launch Wizard**.



When you've reached the '**Complete**' step of the Launch Wizard your survey has been activated. You are provided with a **survey URL,** which can be used to share your survey via personal email or web page.

At the bottom of the window you have the option to return to the survey manager, or send an email invitation. By selecting **Send Invitation** you will be brought to the **Invitations Wizard** where you can build an email invitation and invite users to respond to your survey.

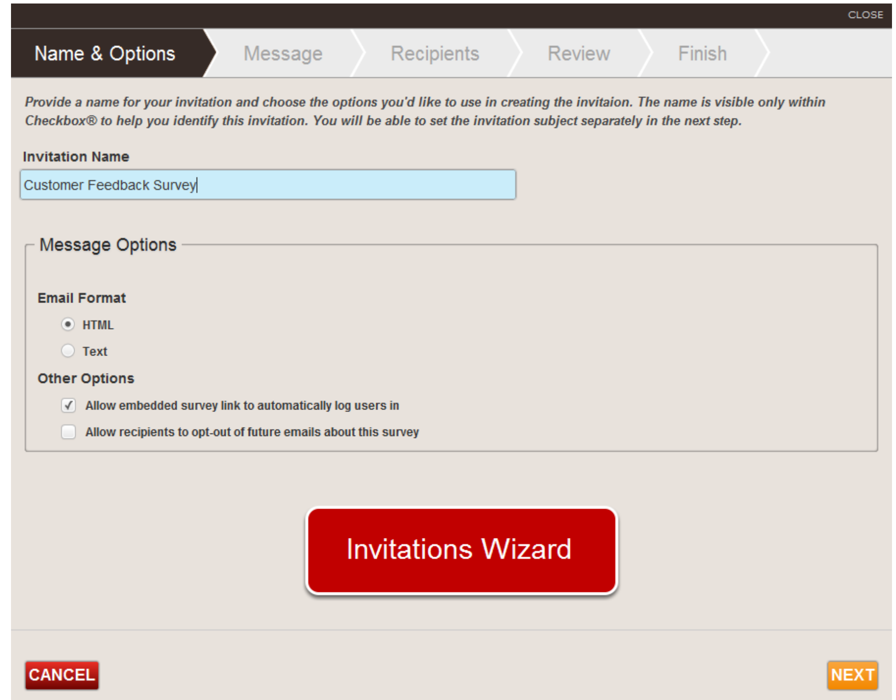
NOTE: You can also reach the Invitations Wizard directly from the Survey Manager Dashboard.

Generate Email Invitation:

Follow the steps in the **Invitations Wizard** to create a new email invitation. You have the choice of either adding users on the '**Recipients**' step and sending your invitation immediately, or not adding users and saving your invitation as a draft for later use.

For more information on the Invitations Wizard, see the Checkbox 5 Email Invitations Guide.

NOTE: The Checkbox Invitations Wizard isn't the only way to invite your respondents to take your survey. You could also send the survey URL via personal email or embed the link via HTML onto a web page.



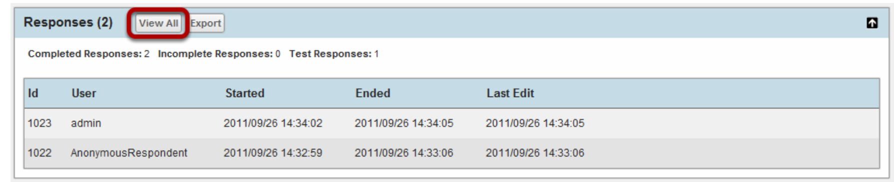
Analyze a survey

By this stage you will have built a survey and sent it to potential respondents. When you begin to receive survey responses, you will want to be able to view the results and interpret the data. There are three ways in which you can view response data:

1. Look at the raw responses
2. Export the data and view using other statistical analysis tools
3. Create reports within Checkbox

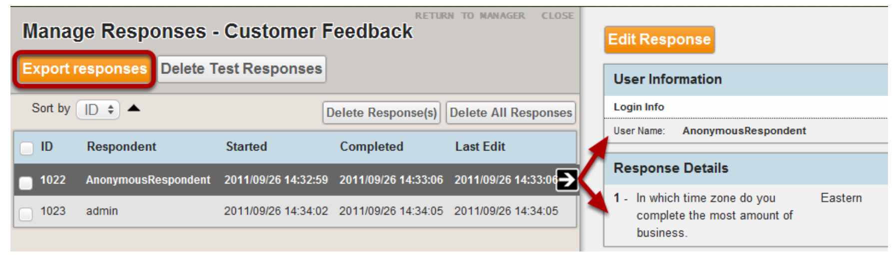
View Raw Responses:

From the Survey Manager screen select the survey you wish to view responses for. This will expand a Survey Dashboard on the right hand side of the screen. Select '**View All**' under the **Responses** section of the dashboard.



You can then select an individual responses to see the full **User Information** and **Response Details** related to that survey response.

From this same area, you can export the survey responses for this survey to CSV by selecting the '**Export Responses**' button.



Export Response Data:

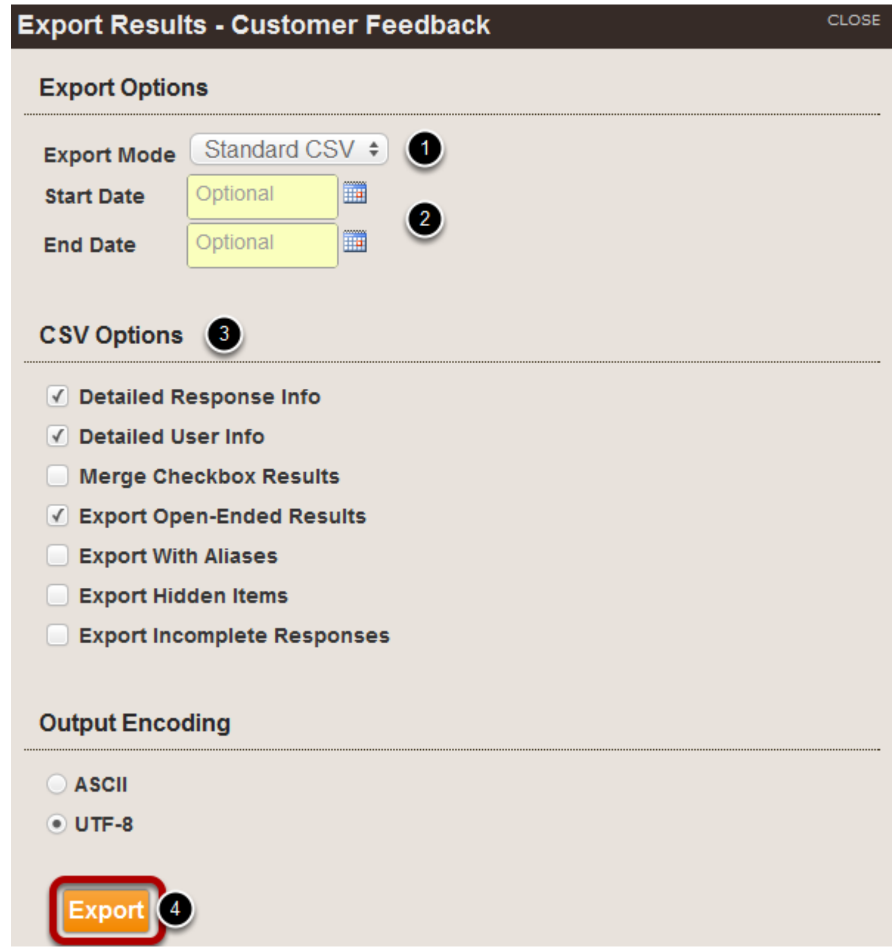
To reach the Export Options window you can either select the '**Export Response'** button in the Response Manager as directed in the previous step, or you can select the '**Export**' button under the **Responses** section of the Survey Dashboard in the Survey Manager.

From the Export Options window:

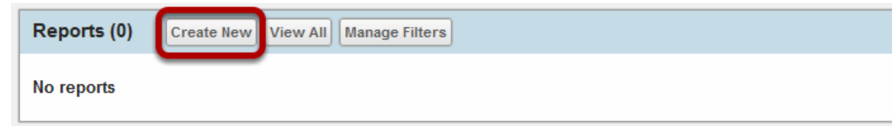
1. Choose an **Export Mode**. You may choose to export response data to CSV, SPSS Compatible CSV, or SPSS Native Format (.sav)
.
2. Supply specific **Start and End Dates** to filter responses to a certain time period.
3. Choose from range of **CSV field options** to determine what should be included in your data export.
4. Select **EXPORT** to export your data.

Your survey export can be opened at this point for viewing, sorting, filtering, or saved for use at a later date. You can also import the data into other third party tools for further analysis.

For more information on Export Options view the Checkbox 5 Reporting & Exporting Guide



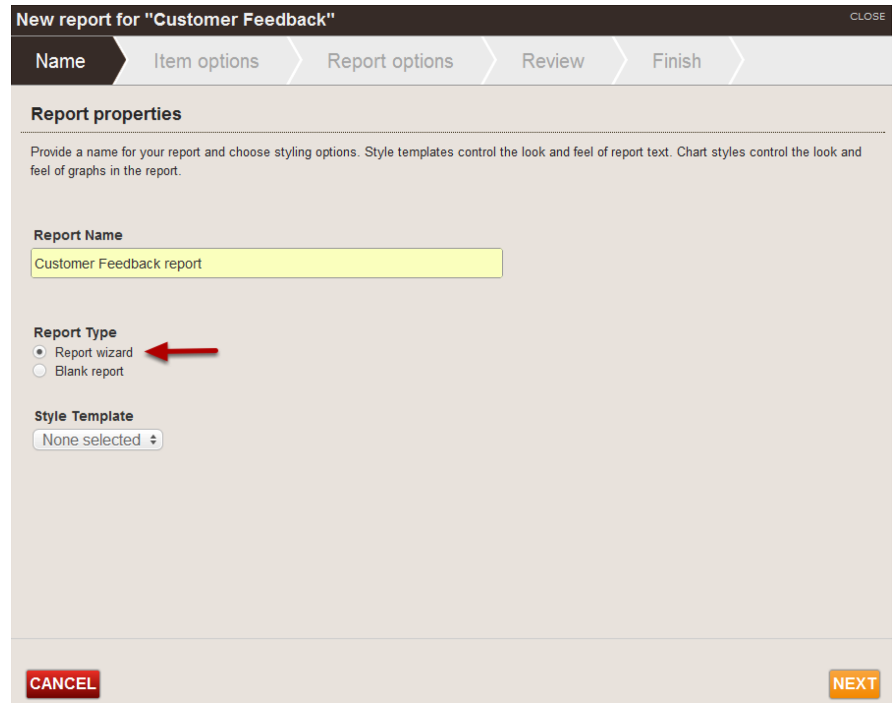
Create A Report:



Select ‘**Create New**’ from the **Reports** section of the Survey Dashboard. Checkbox’s **Report Wizard** will open and guide you through the various steps to creating a report.

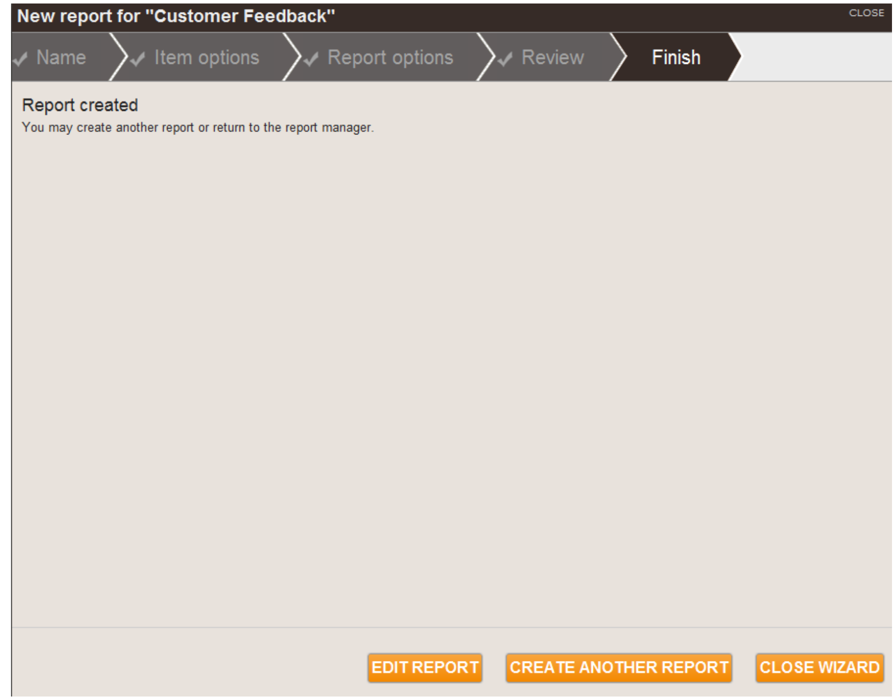
Follow the steps in the Reports Wizard and configure to your specifications.

1. **Name** your report
2. Determine the Report **Type**. The '**Report Wizard**' option will automatically generate a chart for each of your survey questions. The '**Blank Report**' option will ask you to build a report from scratch. For this example, select ‘Report Wizard’ as your Report Type.
3. You may choose a pre-configured Style Template to apply to your report. Style Templates are created in the Styles Manager.
4. Select **NEXT** to save your changes and continue.



After setting your Item Options, Report Options, and reviewing your changes, you will reach the 'Finish' step. At this point you have three options: **EDIT** your new report, **CREATE** another report, or **CLOSE** the Reports Wizard. In this example we will select the '**Edit Report**' button, which will bring us to the **Report Editor.**

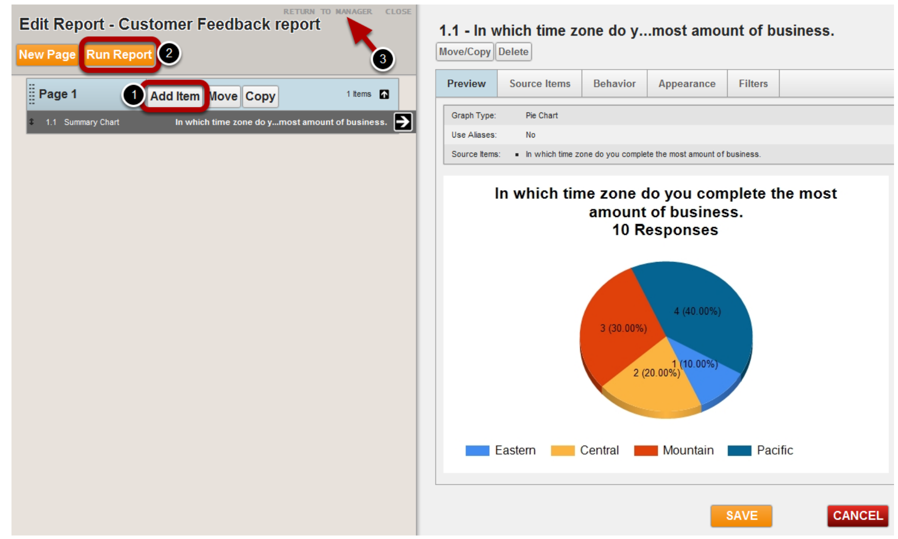
For more information on the Report Wizard view the Checkbox 5 Reporting & Exporting Guide



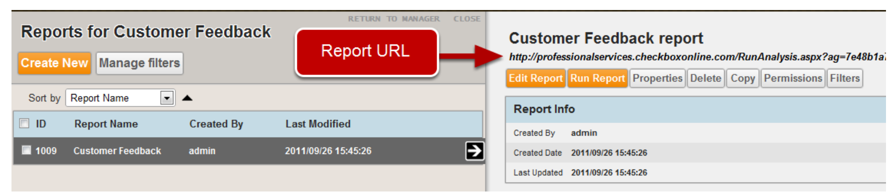
From the **Report Editor** you have the option to:

1. Add and edit report items. The process is the same as for survey items. Select '**Add Item**' to add a new report item, and use the editor tabs on the right hand side to modify to report items.
2. Select the '**Run Report**' button to view your actual report in a new tab/window.
3. Select '**Return to Manager**' to move to the Reports Manager and view all reports created for this survey.

NOTE: The information displayed int the chart preview is sample data. To view your actual response data you must select 'Run Report'



Once in the **Reports Manager Dashboard** you may select a report to edit, delete, copy, or run and share using the **Report URL** provided. This URL is unique to the individual report you selected.



There are many other things you can do with reports that are not covered here, such as:

- Create a report from scratch
- Edit the report and add additional items
- Create and edit filters
- Run cross tab analysis

For more information on customizing reports view the Checkbox 5 Reporting & Exporting Guide

Conclusion

This Quick Start Guide has showed you how to create a simple survey, how to send it to your respondents and how to view your responses. For further in-depth instructions on the Checkbox product please review our following resources here: http://www.checkbox.com/resources/