

## Checkbox 5 Survey Creation Guide

---

This How-To Guide walks you through the process of creating a simple survey, adding a Question Item to a page, and returning to the Survey Dashboard.

### Create New Survey



Enter the **Survey Manager** by selecting the **SURVEYS** at the top of the page.

To create a new survey, select the **Create Survey** button in the Survey Manager menu.

The screenshot shows a 'Create New Survey' dialog box with a 'CLOSE' button in the top right corner. The dialog is divided into several sections: 'Survey Settings', 'Style Template', and 'Other Options'. The 'Survey Settings' section includes a 'Survey Name' field (1) containing 'Feedback Survey', an 'Alternate URL' field (2) containing 'Feedback-Survey.aspx', an 'Enable Scoring' checkbox (3) which is unchecked, an 'Allow Survey Editors to edit this survey when it is "Active"' checkbox (4) which is checked, and a 'Survey is Active' checkbox (5) which is checked. The 'Style Template' section has three dropdown menus for 'For PCs', 'For Tablets', and 'For Smartphones', all set to 'No Style' (6). The 'Other Options' section has a 'Folder' dropdown (7) set to '<No Folder>'. At the bottom, there are 'SAVE' and 'CANCEL' buttons.

Configure your **initial survey settings** within the dialog box that appears.

1. Create a name for the survey
2. This is an option feature, as Checkbox will automatically generate an activation URL for all surveys. However, if you wish to create a customized URL you may do so here. The Alternate URL field will auto-fill as you enter a survey name but this text can be modified.
3. Enabling scoring will allow you to assign numeric values to answer choices and insert scoring-specific items, such as Scoring Messages. This function is commonly used for tests and quizzes.
4. Enable this function if you wish to allow this survey to be edited while it is live and collecting responses. Disabling this function means that this survey can not be edited once activated.
5. Enable this option if you want this survey activated immediately. You will be able to

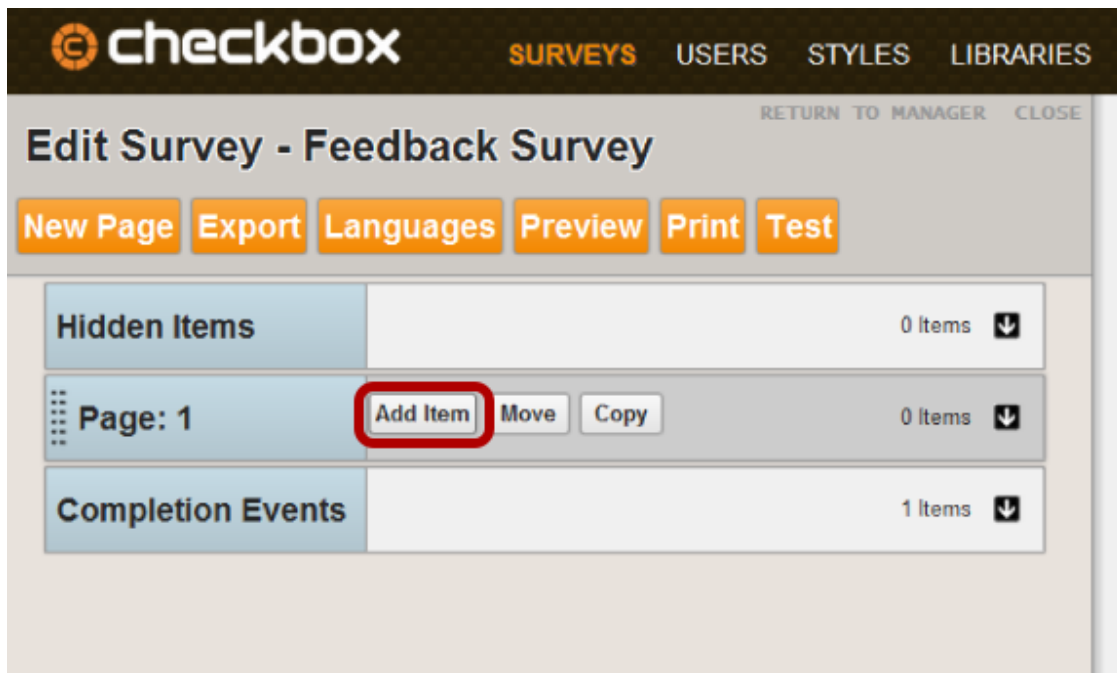
activate/deactivate this survey at any time once the survey is created.

6. Choose to apply pre-existing style templates for various devices (PC, Tablet, Smartphone). This is an optional setting. Styles may be added at any time once the survey is created.
7. Choose to move the survey to a pre-existing survey folder. This is an option setting. You may move surveys to folders at any time once the survey is created.

In this example, we will name our survey 'Feedback Survey' and leave all other settings as their defaults.

Once your initial survey settings are configured, select **SAVE** to enter the **Survey Editor**.

### Add Survey Item



The **Survey Editor** is where you can add pages, items, and logic to a survey.

**Page 1** is pre-populated by default. To add an item to Page 1, hover over the page par and select **Add Item**.

**Select Item** Location Complete

Add New Item Copy From Library Import From XML

**Question Items**

- Slider
- Radio Buttons
- Drop Down List
- Checkboxes
- Rating Scale
- Matrix
- Open-Ended Single-Line
- Open-Ended Multi-Line
- File Upload
- CAPTCHA

**Display Items**

**Report Items**

**Action Items**

**Preview:**

Item Type: RadioButtons

Description: List from which one option can be selected.

**Radio Buttons Sample**

- Option 1
- Option 2
- Option 3
- Other

**CANCEL** **NEXT**

## Wizard: Select Item

A wizard will appear from which you will choose and position your survey item. Choose from four survey item categories:

1. Question Items
2. Display Items
3. Report Items
4. Action Items

In this example we will select **Radio Buttons** from the Question Items list. A preview of your selection will appear on the right-hand side of the window.

Select **NEXT** to move to continue in the wizard.

*NOTE: For more information on Question Items view the [Checkbox 5 Question Items Guide >>](#)*

Where on the page should the item be added?

As the last item on the page

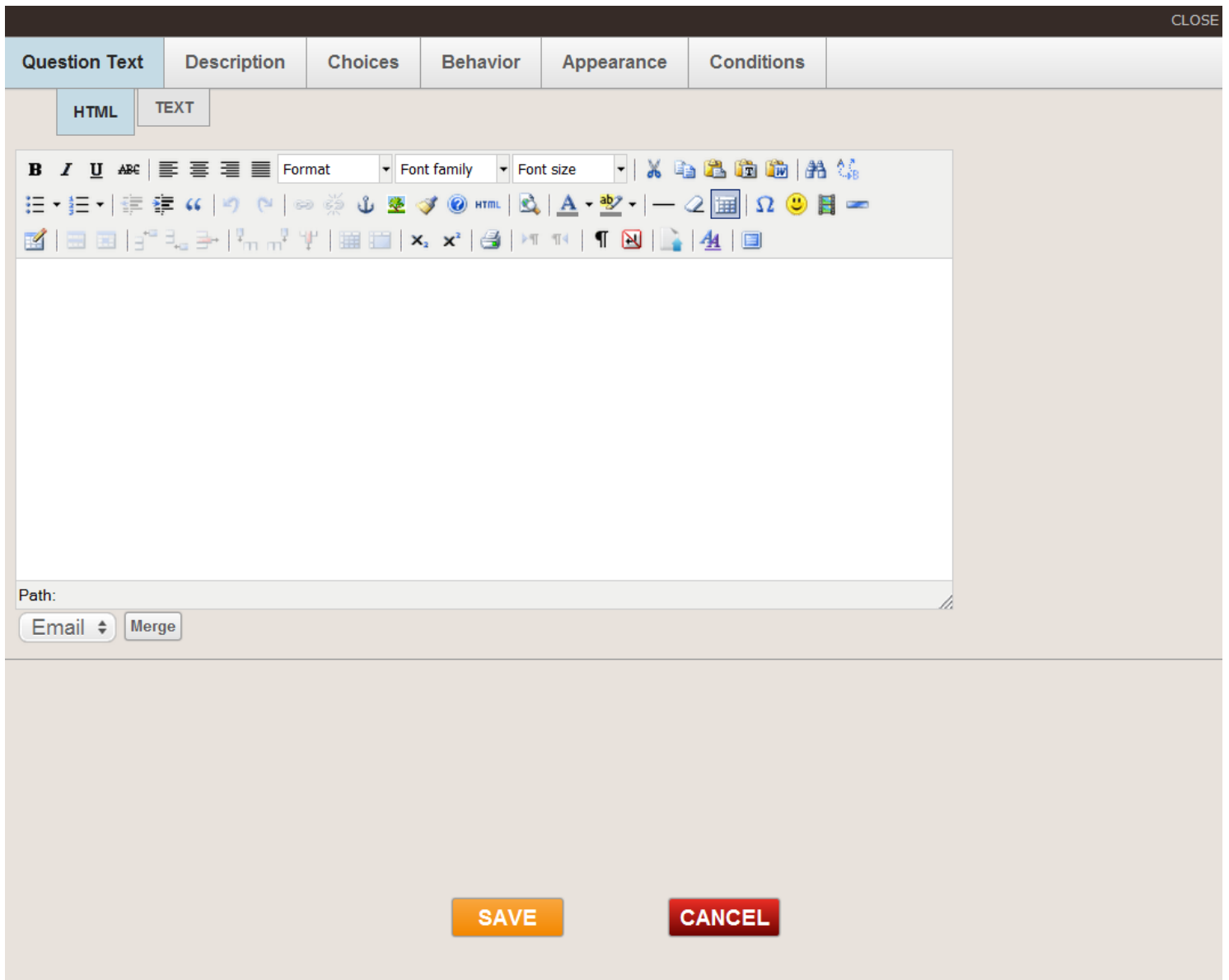
CANCEL PREVIOUS FINISH

### Wizard: Location

On the **Location** step of the wizard you can determine where you would like the item located on

the survey page. Because this is our first item, there is only one location option. As more items are added to survey pages, the drop-down list will populate with additional location options.

Select **FINISH** to configure the survey item.



The screenshot shows the 'Item Editor' window for a survey item. At the top right is a 'CLOSE' button. Below it are tabs for 'Question Text', 'Description', 'Choices', 'Behavior', 'Appearance', and 'Conditions'. Under the 'Question Text' tab, there are sub-tabs for 'HTML' and 'TEXT'. A rich text editor toolbar is visible, containing various icons for text formatting (bold, italic, underline, text color, background color), alignment, bulleted and numbered lists, indentation, link, unlink, image, video, audio, and other media insertion, as well as undo, redo, and clear. Below the toolbar is a large empty text area for editing. At the bottom left, there is a 'Path:' label and two buttons: 'Email' with a dropdown arrow and 'Merge'. At the bottom center, there are two buttons: 'SAVE' (orange) and 'CANCEL' (red).

An **item editor** will appear. From this window you can configure:

- Question/description text
- Answer choices

- Item behavior
- Item appearance

*NOTE: Each survey item has a unique item editor. After viewing this How-To Guide, add each item type to a survey to test out the different item options available for each one.*

*NOTE: Checkbox will automatically save your changes as you move from tab to tab. Select SAVE when you have completed your item configuration to return to the Survey Editor.*

The screenshot displays the 'Question Text' editor in the Checkbox 5 software. The interface includes a top navigation bar with tabs for 'Question Text', 'Description', 'Choices', 'Behavior', 'Appearance', and 'Conditions'. Below this, there are 'HTML' and 'TEXT' tabs. The main editing area features a rich text toolbar with options for bold, italic, underline, text color, background color, paragraph style, font family, and font size. The text input field contains the question: "Was this your first customer support interaction with our company?". Below the text field, there is a 'Path: p' label and two buttons: 'Email' and 'Merge'. At the bottom of the editor, there are 'SAVE' and 'CANCEL' buttons.

In this example we will enter the following text under the Question Text:

"Was this your first customer support interaction with our company?"

*CHECKBOX TIP: Use the HTML editor to customize test, add tables, images, links, and more!*

CLOSE


Question Text	Description	Choices	Behavior	Appearance	Conditions
---------------	-------------	---------	----------	------------	------------

NORMAL VIEW QUICK ENTRY

Default Text Alias

Yes

No

Not Sure   

Email Merge

Next, we will select the Choices tab and enter the following answer options:

- Yes
- No
- Not Sure

Select the "+" icon to the left of the text field to save the answer choice and add a new line.

Select **SAVE** to save the survey item and **return to the Survey Editor**.

**checkbox** SURVEYS USERS STYLES LIBRARIES

RETURN TO MANAGER CLOSE

### Edit Survey - Feedback Survey

New Page Export Languages Preview Print Test

1 2

Hidden Items 0 Items

Page: 1 Add Item Move Copy 1 Items

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

Branching There are no branching rules.

1.1 Radio Buttons Was this your first cus...ction with our company?

Completion Events 1 Items

#### 1.1 - Was this your first cus...ction with our company?

Export Activate/Deactivate Item Move/Copy Delete

Preview	Question Text	Description	Choices	Behavior	Appearance	Conditions
Was this your first customer support interaction with our company?						
<input type="radio"/> Yes						
<input type="radio"/> No						
<input type="radio"/> Not Sure						
Conditions:						
This item will always be displayed.						

SAVE CANCEL

Our new Radio Button item has now been added to Page 1 of our survey. Select the item to preview the item and expand the item editor tabs. Use these tabs to make changes to your survey item.

You can add and experiment with a few more Survey Items by clicking 'Add Item' again and completing the previously outlined process.

At any point you may **Preview (1)** or **Test (2)** your survey. Previewing a survey will simply show you what each page looks like, while testing the survey will simulate how the survey will act during a response and will generate a test response.

## Survey Dashboard

**checkbox** SURVEYS USERS STYLES LIBRARIES

RETURN TO MANAGER CLOSE

### Edit Survey - Feedback Survey

New Page Export Languages Preview Print Test

The **Survey Dashboard** is located within the Survey Manager and contains all pertinent information related to a survey. To view the Survey Dashboard from the Survey Editor, select **'Return To Manager'** on the left side of the editor.

The screenshot displays the 'Survey Manager' interface for a 'Feedback Survey'. The top navigation bar includes 'checkbox', 'SURVEYS', 'USERS', 'STYLES', and 'LIBRARIES'. Below this, the 'Survey Manager' section has buttons for 'Create Folder', 'Create Survey', and 'Import Survey'. The 'Feedback Survey' is selected and highlighted. The right-hand side of the dashboard features several sections:

- Edit Survey** (highlighted in a red box)
- Feedback Survey** (title)
- Status** (selected tab), **Configure**, **Responses**, **Reports**, **Invitations**
- Launch** (highlighted), **Preview**, **Test**, **Copy/Move**, **Export**, **Delete**
- LINKS**:
  - <http://howto.checkboxonline.com/Survey.aspx?s=07628f4b4dda4633ae6242e3c4dcf100>
  - <http://howto.checkboxonline.com/Feedback-Survey.aspx>
- INFORMATION**:
  - Created By:** admin
  - Last Updated:** 01/13/2012 02:35 PM
  - Scored:**
  - Locked:**
  - Anonymize Responses:**
- ACTIVATION (OPEN TO RESPONDENTS)**:
  - Active:**
  - Allow 'Back' Button:**
  - Total response limit:** No limit
  - Per Respondent response limit:** No limit
  - Allow respondents to edit previously completed responses:**
  - Allow respondents to stop and resume their response later:**
- STATISTICS**:
  - Completed Responses:** 0
  - Pages:** 3
  - Questions:** 3

Once in the Survey Manager, your survey should be pre-select on the left-hand side of the page, and the survey's dashboard should be open on the right-hand side of the page.

A Survey Dashboard consists of several tabs, including:

- **Status:** survey overview
- **Configure:** permissions and appearance settings
- **Responses:** view and export survey responses
- **Reports:** view and generate reports
- **Invitations:** generate and deploy survey invitations

To return to the Survey Editor, select the **Edit Survey** button at the top of the dashboard.

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