

Checkbox 5 User Creation Guide

This guide takes you through the steps of creating a new **User Profile** within Checkbox Survey, which include adding login credentials, user attributes, user roles, and group assignments.

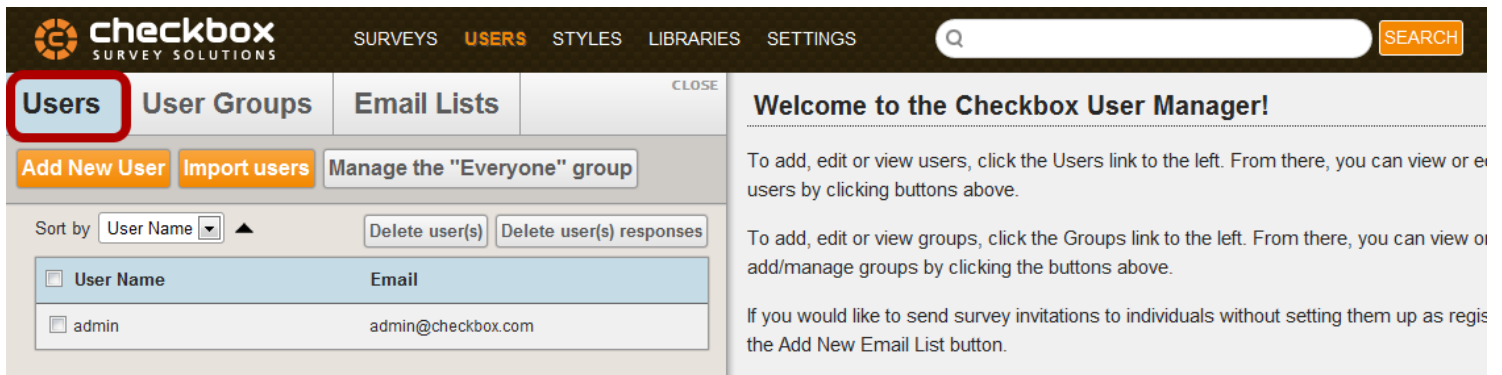
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User Manager



Add and manager 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.

The image is a screenshot of the 'User Manager' interface. At the top, there is a navigation bar with the 'USERS' menu item highlighted. Below this, there are three tabs: 'Users', 'User Groups', and 'Email Lists'. The 'Users' tab is selected and highlighted with a red circle. Under the 'Users' tab, there are three buttons: 'Add New User', 'Import users', and 'Manage the "Everyone" group'. Below these buttons, there is a 'Sort by' dropdown menu set to 'User Name' and two buttons: 'Delete user(s)' and 'Delete user(s) responses'. A table with two columns, 'User Name' and 'Email', is displayed. The table contains one row with the user name 'admin' and the email address 'admin@checkbox.com'. On the right side of the interface, there is a 'Welcome to the Checkbox User Manager!' message with instructions on how to add, edit, or view users and groups.

To add or import users you must be in the **Users** view, which should be open by default when you enter the User Manager. In this example we will set up a new **User Profile** manually through a Checkbox wizard. The Import Users option will not be used in this document.

To begin the manual user creation process, select the orange **Add New User** button located below the view tabs. This will open the **Add New User Wizard** in a pop-up window. This wizard will walk you through the steps of:

- Creating Login Credentials
- Adding User Attributes/Profile Properties
- Designating User Roles
- User Group Membership

Login Information/Credentials

The screenshot shows the 'Add new user' wizard with the 'Username' step selected. The wizard has a progress bar at the top with steps: Username, Profile, Roles, Groups, Review, and Finish. The 'Login information' section contains the following fields:

- Desired username:** A text input field containing 'UserName1' with a circled '1' next to it.
- Email address:** A text input field containing 'user1@email.com' with a circled '2' next to it.
- Password:** A password input field with masked characters '.....' and a circled '3' next to it.
- Confirm password:** A password input field with masked characters '.....'.

At the bottom of the wizard, there is a red 'CANCEL' button on the left and an orange 'NEXT' button on the right with a circled '4' next to it. A 'CLOSE' button is visible in the top right corner of the wizard window.

The first step of the wizard asks you to enter the login credentials for the new user. All Checkbox users must be assigned a unique username, email address and password upon creation.

1. Desired Username
2. Email Address
3. Password & Confirm Password
4. Select **Next** to continue to the next step

CHECKBOX TIP: A user's Username can be the same as that user's Email Address

In order to track exactly which user submitted which response, a respondent must be logged into Checkbox at the time of taking the survey.

NOTE: If you are deploying a survey email invitation to a user via Checkbox the user does not actually need to know their log-in credentials, because Checkbox will automatically log the user in once the user selects the survey activation link in the body of the email.

Adding User Attributes/Profile Properties

The screenshot shows a multi-step wizard for adding a new user. The current step is 'Profile', which is highlighted in a dark grey arrow. The other steps are 'Username', 'Roles', 'Groups', 'Review', and 'Finish', shown in lighter grey arrows. The 'Profile' section is titled 'Profile properties' and includes a note: 'Enter the user profile properties. All fields are optional.' There are three input fields: 'FirstName' with the value 'Bob', 'LastName' with the value 'Baker', and 'CompanyName' with the value 'Company1'. At the bottom of the dialog, there are three buttons: 'CANCEL' (red), 'PREVIOUS' (orange), and 'NEXT' (orange). A 'CLOSE' button is located in the top right corner of the dialog.

FirstName	Bob
LastName	Baker
CompanyName	Company1

Also referred to as **User Attributes**, Profile Properties can be used as the source for Conditions, Branching and Merging in Checkbox surveys and invitations.

NOTE: For more information on Conditions, Branching and Merging, view the [Checkbox 5 Conditions and Branching Guide](#) and the [Checkbox 5 Merging Guide](#)

Settings

Survey settings

Report settings

User settings 2

Users

Profile Properties 3

System settings

Profile Properties

These properties are applied to every user in the Checkbox application. Please note that any changes you make will take effect immediately.

Property name	Move up	Move down	Delete	Attribute is hidden
FirstName	↑	↓	✖	<input type="checkbox"/>
LastName	↑	↓	✖	<input type="checkbox"/>
CompanyName	↑	↓	🗑	<input type="checkbox"/>

PhoneNumber + 4

Hide this property on the 'Edit My Info' page.

Custom Profile Properties can be added, modified, and deleted within the **Settings Manager**. There is no limit to the number of Profile Properties you can add. Any changes you make in the Settings area will be applied across your entire Checkbox account for all users.

Follow the steps below to create a new Profile Property.

1. Navigate to the **Settings Manager**
2. Expand the **User Settings** menu
3. Select **Profile Properties**
4. Enter your new Profile Property label in the available text field and select the '+' icon

Designating User Roles

The screenshot shows a multi-step process for adding a new user. The steps are: Username, Profile, Roles, Groups, Review, and Finish. The 'Roles' step is currently active. Below the step indicators, the 'User roles' section contains a list of roles with checkboxes. The roles are: System Administrator, User Administrator, Survey Administrator, Respondent, Report Viewer, Report Administrator, Survey Editor, and Group Administrator. The 'Respondent' and 'Report Viewer' roles are selected. At the bottom of the dialog, there are three buttons: 'CANCEL', 'PREVIOUS', and 'NEXT'.

Add new user CLOSE

✓ 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**

Assign one or more **User Role(s)** to users to determine their level of access within Checkbox. Access levels include:

- **System 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 (Note: Survey permissions must also be configured to allow for modification)
- **Respondent** - Can respond to surveys
- **Report Viewer** - Can view existing reports (Note: Report permissions must also be

configured to allow for viewing)

- **Report Administrator** - Can view reports and create new ones (Note: Report permissions must also be configured to allow for viewing/editing)
- **Survey Editor** - Can create and modify surveys (Note: Survey permissions must also be configured to allow for editing)
- **Group Administrator** - Can assign users to groups (Note: Group permissions must also be configured to allow for modification)

User Roles alone are not always the final step in granting access to an entity within Checkbox (report, survey, user group, etc.). The individual permissions/security settings of the entity a user wishes to view/modify must also be configured to allow access.

For example, let's say you designate a particular user, Bob, as a Report Viewer. You have a report in your account that is configured to only allow specific users whom have been included on an Access Control List (ACL) to have access to this report. Bob is not included on the ACL for your report. Even though Bob has a Report Viewer designation, he will not be able to view your report. Conversely, if Bob is included on the ACL for your report, but he has not been designated as a Report Viewer in his user profile, he will not be able to view your report.

NOTE: For more information on Access Control Lists view the [Checkbox 5 Permissions Guide](#)

User Group Membership

The screenshot shows a dialog box titled "User Groups - UserName1" with a "CLOSE" button in the top right corner. The main heading is "User groups" with a sub-instruction: "Select the groups you would like this user to belong to." Below this, there are two columns: "Available Groups" on the left and "Selected Groups" on the right. Each column has a "Filter list:" input field with a minus sign icon. The "Available Groups" list contains "Email List" and "Test Group". A red arrow points from "Email List" to the right. In the center, between the two lists, there are two orange buttons: ">>" (highlighted with a red square) and "<<". At the bottom, there are "SAVE" and "CANCEL" buttons.

From this window you have the ability to add a new user to an existing **User Groups**.

To add a user to one or more group(s), select the desired group from the **Available Groups** list on the left. Use the directional arrows in the center of the window to move the desired group into the **Selected Groups** list on the right.

Review Profile Settings

Add new user CLOSE

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

Ready to create user

Please review the information below to ensure it is correct

User information	
Username	UserName1
Email address	user1@email.com
Domain	[None]
FirstName	Bob
LastName	Baker
CompanyName	Company1

Selected roles
Respondent
Report Viewer

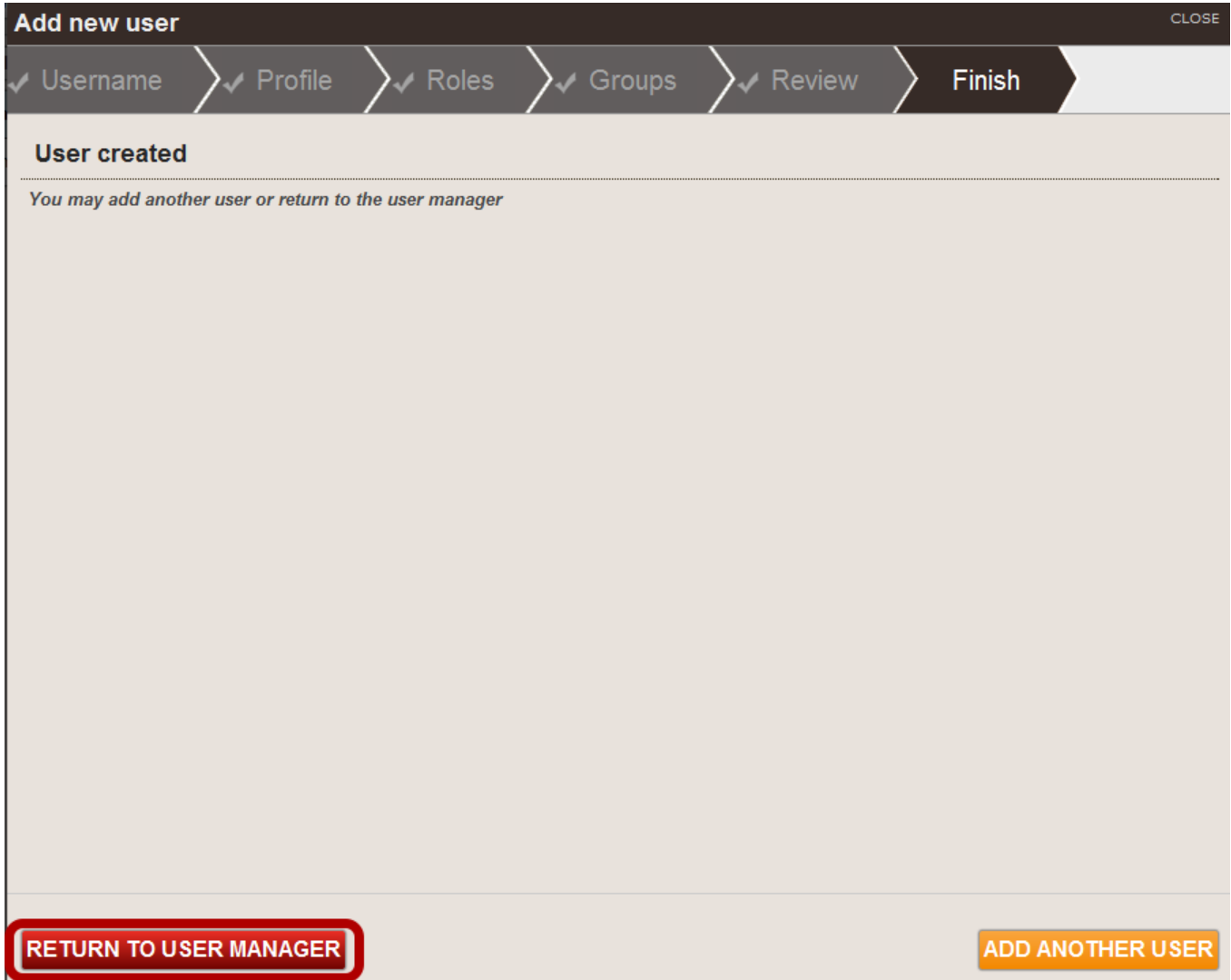
Selected groups
Email List

1

CANCEL **PREVIOUS** 2 3 **FINISH**

1. Before finishing the Add New User wizard, **review** your user's profiles settings
2. If you need to make any changes to your user, select the **Previous** button to return to earlier steps
3. When you are satisfied with your profile settings, select **Finish** to save your new user

Finish Wizard



The screenshot shows the final step of a wizard titled "Add new user". At the top, a dark grey header contains the title "Add new user" and a "CLOSE" button. Below the header is a progress bar with five steps: "Username", "Profile", "Roles", "Groups", and "Review", each with a checkmark and a right-pointing arrow. The "Finish" step is the current step, highlighted with a dark grey background and a white arrow pointing right. Below the progress bar, the main content area has a light beige background. It starts with the heading "User created" followed by a dotted line and the text "You may add another user or return to the user manager". At the bottom of the screen, there are two buttons: "RETURN TO USER MANAGER" on the left, which is highlighted with a red border, and "ADD ANOTHER USER" on the right, which is highlighted with an orange border.

On the final page of the wizard you have the option to either add another user, which will restart the wizard, or return to the User Manager. In this example we will select **Return to User Manager** to view our new user.

View User Profile Dashboard

The screenshot displays the Checkbox 5 User Manager interface. The top navigation bar includes 'checkbox SURVEY SOLUTIONS', 'SURVEYS', 'USERS', 'STYLES', 'LIBRARIES', 'SETTINGS', and a search bar. The main content area is divided into three tabs: 'Users', 'User Groups', and 'Email Lists'. The 'Users' tab is active, showing a list of users with columns for 'User Name' and 'Email'. The user 'UserName1' with email 'user1@email.com' is selected, and a red arrow labeled '1' points to the right-pointing arrow icon next to it. To the right, the 'Profile Dashboard' for 'UserName1' is expanded, showing tabs for 'Login Credentials', 'Profile Properties', 'User Roles', and 'Group Memberships'. A red arrow labeled '2' points to the 'Group Memberships' tab. The dashboard content includes sections for 'Login Information', 'Profile Properties', 'User Roles', and 'Group Memberships'.

Login Information	
User Name :	UserName1
Auth Type :	CheckboxPasswordUser
Email Address :	user1@email.com
User Guid :	bae905f8-a28a-4944-86e3-fb3fd8ce1652
Automatic Login :	http://professionalservices.checkboxonline.com/Login.aspx?u=bae905f8-a28a-4944-86e3-fb3fd8ce1652

Profile Properties	
FirstName:	Bob
LastName:	Baker
CompanyName:	Company1

User Roles	
Report Viewer	
Respondent	

Group Memberships
User is not a member of any user groups.

Upon completion of the Add New User Wizard you will automatically return to the User Manager. You should now see your new user listed on the left side of the manager.

1. Select your new user from the list of existing users to expand the **Profile Dashboard**. Within this dashboard you will find all of the profile information related to this user
2. Use the tabs at the top of the dashboard to modify user profile information

NOTE: For more information on the User Manager visit [Checkbox 5 User Management Guide](#)

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