

## Checkbox 5 - User Import Guide

---

This guide will walk you through the process of importing a .CSV (Comma Delimited) file listing users and user attributes into Checkbox Survey's **User Manager**.

### Create User List

	A	B	C	D	E	F
1	UserName1	pw1	UserName1@email.com	Bob	Baker	Company 1
2	Username2	pw2	Username2@emial.com	John	Johnson	Company 2
3	UserName3	pw3	UserName3@email.com	Cathy	Cahill	Company 3
4	UserName4	pw4	UserName4@email.com	Dan	Danielson	Company 4
5	UserName5	pw5	UserName5@email.com	Kristin	Kelly	Company 5
6						

The first step in importing users into Checkbox is to build your list of users. Your worksheet must be saved as a .CSV (Comma Delimited) file. As you can see in the screen shot above, Excel was used to create a list:

Each row contains a unique user. Each column contains a user attribute:

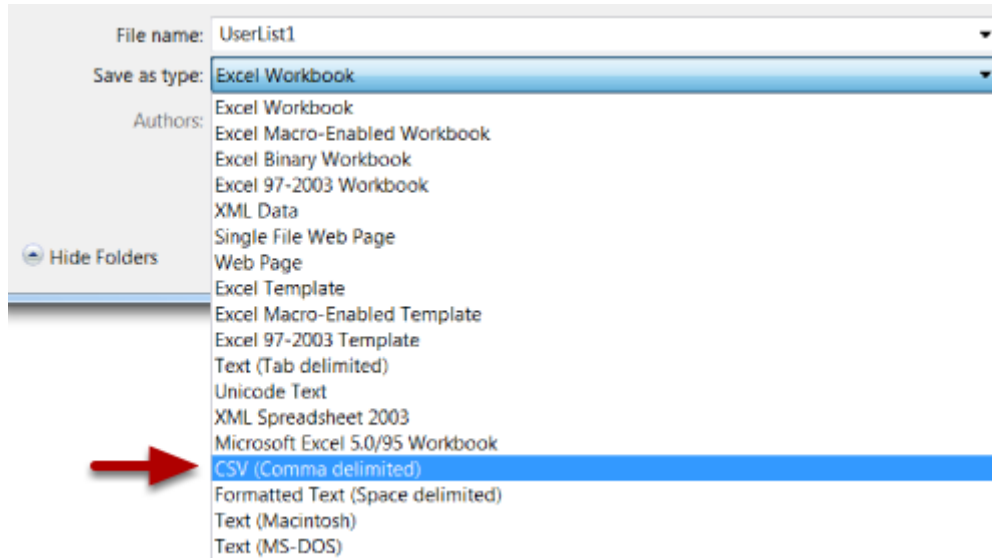
- Column A: UserName
- Column B: Password
- Column C: Email address
- Column D: FirstName
- Column E: LastName
- Column F: CompanyName

*NOTE: When importing data, you must have an **Email Address** column. This is the data field Checkbox users for sending email invitations. Including a **UserName** column in your data import is recommended but not required. If you do not include a UserName column, Checkbox will automatically use the email addresses in the Email column as usernames. If you wish to specify usernames, include a UserName column in your data worksheet. All usernames must be unique.*

*NOTE: Including a **Password** column on your data worksheet is not required unless you wish to specify user passwords. If you do not include a Password column, Checkbox will automatically generate passwords for your users upon import.*

*NOTE: Do not include column labels in your data worksheet. If you do, that row of labels will be flagged as an invalid row upon import.*

## Save File as CSV (Comma Separated Values)



Select **Save As** within Excel (or whichever worksheet creation application used) and then choose the file format as **.CSV**. When saving, Excel may warn you that you will be losing Excel formatting but this is completely fine. Select **OK** to move forward.

## Configure Import Fields

The image shows the 'Settings' page in the Checkbox Survey Solutions application. The 'SETTINGS' tab is selected. The 'User settings' section is expanded, and the 'Profile Properties' sub-section is highlighted. A table of profile properties is shown, including 'FirstName', 'LastName', and 'CompanyName'. A red arrow points to the '+' icon next to the 'CompanyName' field.

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

Before importing user data, you must make sure all of the data fields you wish to import have been added to your Checkbox account. In this example, our data import includes six user attribute (Profile Property) columns:

- Column A: UserName

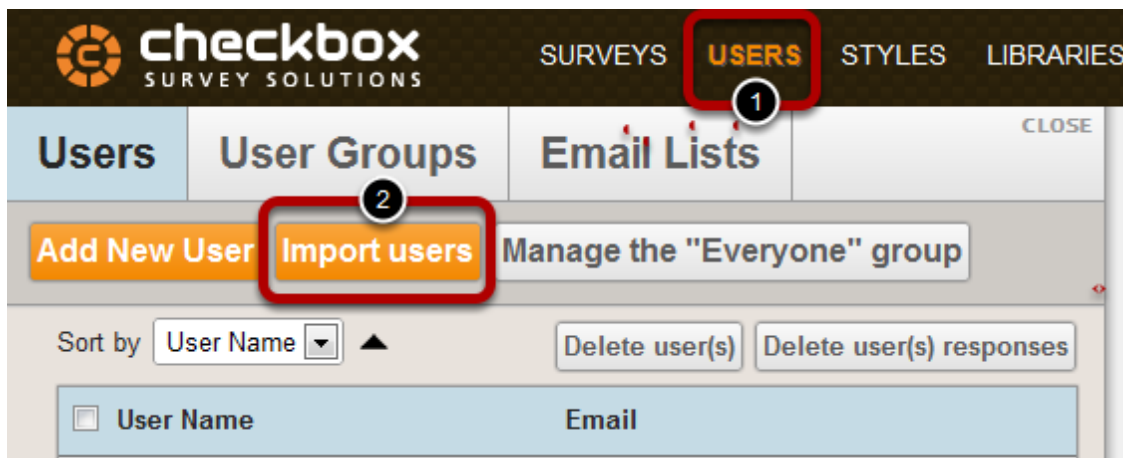
- Column B: Password
- Column C: Email address
- Column D: FirstName
- Column E: LastName
- Column F: CompanyName

The 'UserName', 'Password', and 'Email' **Profile Property Names** are pre-populated in Checkbox. To add 'FirstName', 'LastName', and 'CompanyName', follow the steps below:

1. Select the '**Settings**' tab on the main application menu to enter the **Settings Manager**
2. Expand '**User Settings**' on the left hand menu and select '**Profile Properties**'
3. Selecting 'Profile Properties' will open a dashboard on the right hand side of the screen. From here you can enter a **Profile Property Name** in the text field provided, and select the '+' icon to add that Profile Property. Repeat this process until you have added all desired Profile Properties

*NOTE: These Profile Property Names applied to every user in the Checkbox application. Any changes you make to these names will take effect immediately.*

### Begin Checkbox User Import Process



1. Select the '**Users**' icon from the main menu to enter the **User Manager**
2. Select the orange '**Import Users**' button to begin the user import process

## User Import Wizard: LAYOUT

**Import users** CLOSE

Layout > Upload > Users > Roles > Groups > Review > Finish

**File layout**

Select the columns that you wish to include in your import and the order in which they will appear in the import file. You must select either Username or Email address. If you select Email address but not Username, the Email address will be used as the Username as well.

Username  
Password  
Email address  
FirstName  
LastName  
CompanyName

>>  
<<

CANCEL 2 NEXT

You have now entered the Checkbox5 **User Import Wizard**.

1. Move the user attributes (profile properties) you wish to import into the box on the right by using the left/right arrows in the center of the window. Make sure they are listed in the **same order** as in your data worksheet or they will not import properly. You may also reorder the labels after moving them using the up/down arrows
2. Select **Next** to continue

**NOTE:** The Email address and/or UserName field is required. You do not need to add the **'Password'** column unless one is included on your user data worksheet. Checkbox will

automatically generate passwords for your users upon import.

**CHECKBOX TIP:** To quickly and easily move a long list of properties from left to right, select the first label, hold down the SHIFT key on your keyboard, and then select the last label. This will highlight all labels in between the first and last label. You may then select the right-facing arrow to move all labels into the right-hand panel at once.

## User Import Wizard: UPLOAD

**Import users** CLOSE

Layout **Upload** Users Roles Groups Review Finish

**Data source**

**Import method**

- Upload CSV/Text file 1
- Copy/Paste text entry

**Example data row**

Rows in your file or text entry must match the following format:  
Username, Password, Email address, FirstName, LastName, CompanyName 2

Select and upload a comma-separated values [CSV] text file containing the user properties in the order displayed

**Upload file**

Enter the local path to the file you wish to upload

+ Select file to upload... 3

**File encoding**

- ASCII
- Unicode (UTF-8)

**CANCEL** **PREVIOUS** 4 **NEXT**

1. **Import Method** should be set to '**Upload CSV/Text File**'
2. Make sure the rows in your .CSV file are in the same order as shown under **Example Data Row**
3. Click the '**Select File to Upload**' button in the middle of the window to browse your computer for

the desired CSV (comma-separated values) or text file containing your user list. Once selected, the file name should appear below the button.

4. Select **Next** to continue.

#### User Import Wizard: USERS

It is very important that you review this page and confirm that each row is valid and each column contains the proper data. Confirm that the number of rows match what you expected to import. If you find a number less it is possible that you have entered duplicate usernames. If you elect to NOT enter a **username**, the **email address** submitted will become the username. Confirm that your usernames are unique.

Once you have confirmed that the imported users are correct, select **Next** to continue.

*NOTE: If you elected to NOT enter a password then a password will be randomly generated by Checkbox and it will only be viewable within your database*

## User Import Wizard: ROLES

The screenshot shows the 'Import users' wizard with the 'Roles' step selected. The wizard has a progress bar at the top with steps: Layout, Upload, Users, Roles, Groups, Review, and Finish. Below the progress bar, the title 'User roles' is displayed. A instruction reads: 'Select the roles you would like imported users to have. You must select at least one role.' A list of roles is shown with checkboxes: System Administrator, User Administrator, Survey Administrator, Respondent (checked), Report Viewer, Report Administrator, Survey Editor, and Group Administrator. A red box highlights the 'Respondent' role, and a circled '1' is next to it. At the bottom, there are buttons for 'CANCEL', 'PREVIOUS', and 'NEXT'. The 'NEXT' button is highlighted with a red box and a circled '2'.

1. Select the role(s) you wish to give imported users. These roles determine the level of access users have within Checkbox. In the above example, users will be imported as **Respondents**, which means they will have the ability to respond to surveys only.

2. Select **Next** to continue.

## User Import Wizard: GROUPS

**Import users** CLOSE

Layout Upload Users Roles **Groups** Review Finish

### User groups

Select the groups you would like imported users to belong to.

**Available Groups** Filter list: [ ]

Email List  
Test Group

**Selected Groups** Filter list: [ ]

1 >>

<<

CANCEL PREVIOUS 2 NEXT

1. Select the user group(s) you would like your imported users to belong to (if any) by moving group names into the right-hand pane using the two left/right arrows in the center of the window. In this example we have selected the 'Test Group' user group.

2. Select **Next** to continue.

## User Import Wizard: REVIEW

**Import users** CLOSE

Layout Upload Users Roles Groups **Review** Finish

### Ready to import users

Please review the information below to ensure it is correct

**User information**

Importing 5 user(s) **1**

**Update existing users** When checked, imported users that already exist will be updated with any new roles, group memberships, and/or profile properties. Please note that the existing users will only be added to new groups and will not be removed from existing groups. When unchecked, imported user data matching an existing user will be ignored. **2**

Selected roles	Selected groups
Respondent	Test Group

**3**

**CANCEL** **PREVIOUS** **4** **FINISH**

Review the user import information summarized on this page to ensure it is correct.

1. Confirm that the number of imported users is correct
2. If you are importing users that already exist within Checkbox you may use the **Update Existing Users** option to update those users. User profiles and roles will be updated as dictated, both additions and subtractions will be made. Any new user groups selected during the import process will be added to the user but none of the current user groups will be removed.
3. Confirm that the **Selected Roles** and **Selected Groups** display the correct information respectively
4. Select **Finish** to complete the user import process.

## User Import Wizard: FINISH

**Import users** CLOSE

Layout > Upload > Users > Roles > Groups > Review > **Finish**

**User Import Complete**

User import complete. Created 5 new users and updated 0 users.

*You may re-start the wizard to import additional users or return to the user manager*

**RETURN TO USER MANAGER** **RESTART WIZARD**

The import process is now complete. At this time you may re-start the wizard to import additional users or return to the User Manager. In this example we will return to the User Manager to view our new users.

## View New Users

The screenshot displays the 'View New Users' interface. On the left, there is a navigation menu with 'Users', 'User Groups', and 'Email Lists'. Below this, there are buttons for 'Add New User', 'Import users', and 'Manage the "Everyone" group'. A 'Sort by' dropdown is set to 'User Name'. Below the sorting options is a table of users:

<input type="checkbox"/>	User Name	Email
<input type="checkbox"/>	admin	admin@checkbox.com
<input checked="" type="checkbox"/>	UserName1	UserName1@email.com
<input type="checkbox"/>	Username2	Username2@emial.com
<input type="checkbox"/>	UserName3	UserName3@email.com
<input type="checkbox"/>	UserName4	UserName4@email.com
<input type="checkbox"/>	UserName5	UserName5@email.com

On the right, the 'UserName1' profile is shown with tabs for 'Login Credentials', 'Profile Properties', 'User Roles', and 'Group Memberships'. The 'Login Information' section shows:

- User Name : UserName1
- Auth Type : CheckboxPasswordUser
- Automatic Login : http://professionalservices.checkboxonline.com/Login.aspx?u=13c44f6

The 'Profile Properties' section shows:

- FirstName: Bob
- LastName: Baker
- CompanyName: Company 1
- Username: UserName1
- Password: pw1
- Email address: UserName1@email.com

The 'User Roles' section shows 'Respondent'.

The 'Group Memberships' section is currently empty.

As you can see, our five new users have been added to the User Manager. Select a user on the left to view that user's Profile Properties, Login Information, User Roles, and Group Memberships on the right. From this view you can modify this user or delete it altogether.