

Checkbox 5 User Manager Guide

This guide provides an overview of Checkbox's **User Manager** and how to update existing user profile information.

CONTENTS:

User Manager Overview

Users View

- Login Information
- Profile Properties
- User Roles
- Group Memberships

Delete User Responses

User Groups View

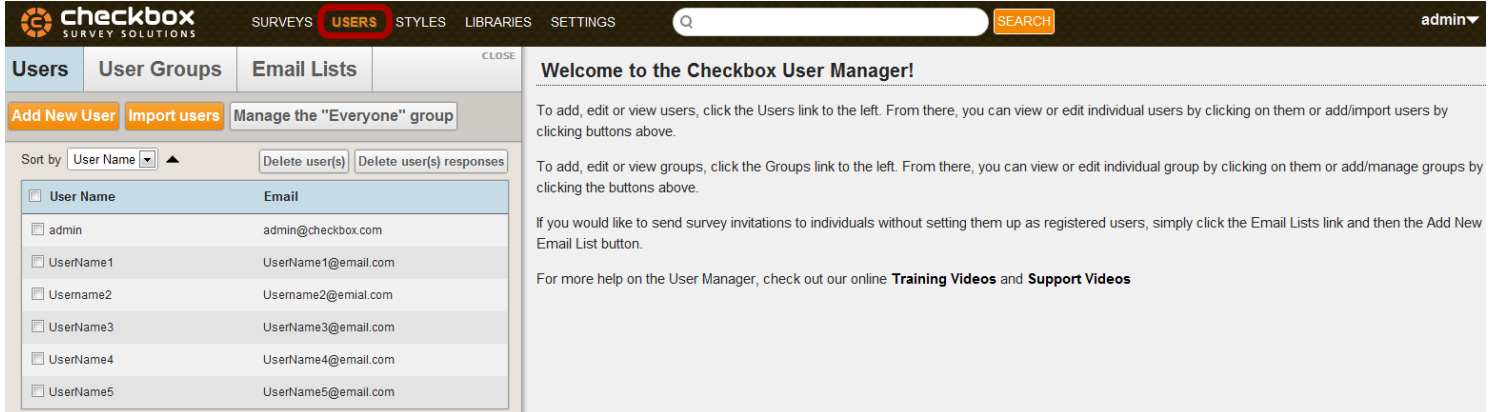
- Group Properties
- Add Members
- Security
- Copy Group

Email Lists View

- Properties
- Add Addresses
- Security

Delete Records

User Manager Overview



The screenshot shows the Checkbox User Manager interface. The top navigation bar includes 'checkbox SURVEY SOLUTIONS', 'SURVEYS', 'USERS' (highlighted), 'STYLES', 'LIBRARIES', 'SETTINGS', a search bar, and 'admin'. The main content area has three tabs: 'Users', 'User Groups', and 'Email Lists'. The 'Users' tab is active, showing a table of users and a 'Welcome to the Checkbox User Manager!' message.

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

Add and manage 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.

When you enter the User Manager you will see three view options:

- **Users** (open by default) - Add/import and manage users
- **User Groups** - Create and manage groups
- **Email Lists** - Create and manage email lists

On the left side of the manager you will see a list of users, user groups, or email lists, depending on which tab on the User Manager menu is selected.

The screenshot shows the 'Users' tab selected in the 'Users Manager' interface. The left sidebar contains a table of users with columns for 'User Name' and 'Email'. A red box highlights the 'Sort by' dropdown menu, which is currently set to 'User Name'. A red arrow points to the dropdown arrow. Below the table are buttons for 'Delete user(s)' and 'Delete user(s) responses'. The main content area displays a 'Welcome to the Checkbox User Manager!' message with instructions on how to add, edit, or view users and groups, and links to training and support videos.

On the left side of the manager you will see a list of users, user groups, or email lists, depending on which tab on the Users Manager menu is selected. Use the **Sort by** drop-down to organize your lists.

Users View

The screenshot shows the 'Users View' for a specific user, 'UserName1'. The left sidebar shows the user list with 'UserName1' selected. The main content area displays the user's details, including login information, profile properties, user roles, and group memberships. A red box highlights the user details section, which is divided into four numbered sections: 1. Login Information, 2. Profile Properties, 3. User Roles, and 4. Group Memberships.

To add/import and manage users, select the **Users** tab from the manager view options. When the Users view is open you will see three buttons on the left side of the window below the view options:

- **Add New User** (see [Checkbox 5 User Creation Guide](#))
- **Import Users** (see [Checkbox 5 User Import Guide](#))

- **Manage the "Everyone" Group:** The Everyone Group contains all Checkbox Users. When creating an access list for a Checkbox entity (Survey, Report, Library, User Group, etc.) you may add this group to the ACL to grant access to all registered Checkbox users.

Below these buttons is a list of existing users. These are users that have either been entered manually or imported into Checkbox. Select a user from the list to expand an informational dashboard on the right side of the Manager. From this dashboard you should be able to view and modify:

1. Login Information
2. Profile Properties
3. User Roles
4. Group Memberships

Login Credentials - UserName1 CLOSE

Login type

Checkbox authentication *Checkbox users are authenticated directly against Checkbox.*

External authentication *All user information and properties are controlled within Checkbox.*

Login credentials

Username 1

Email address 2

Password 3

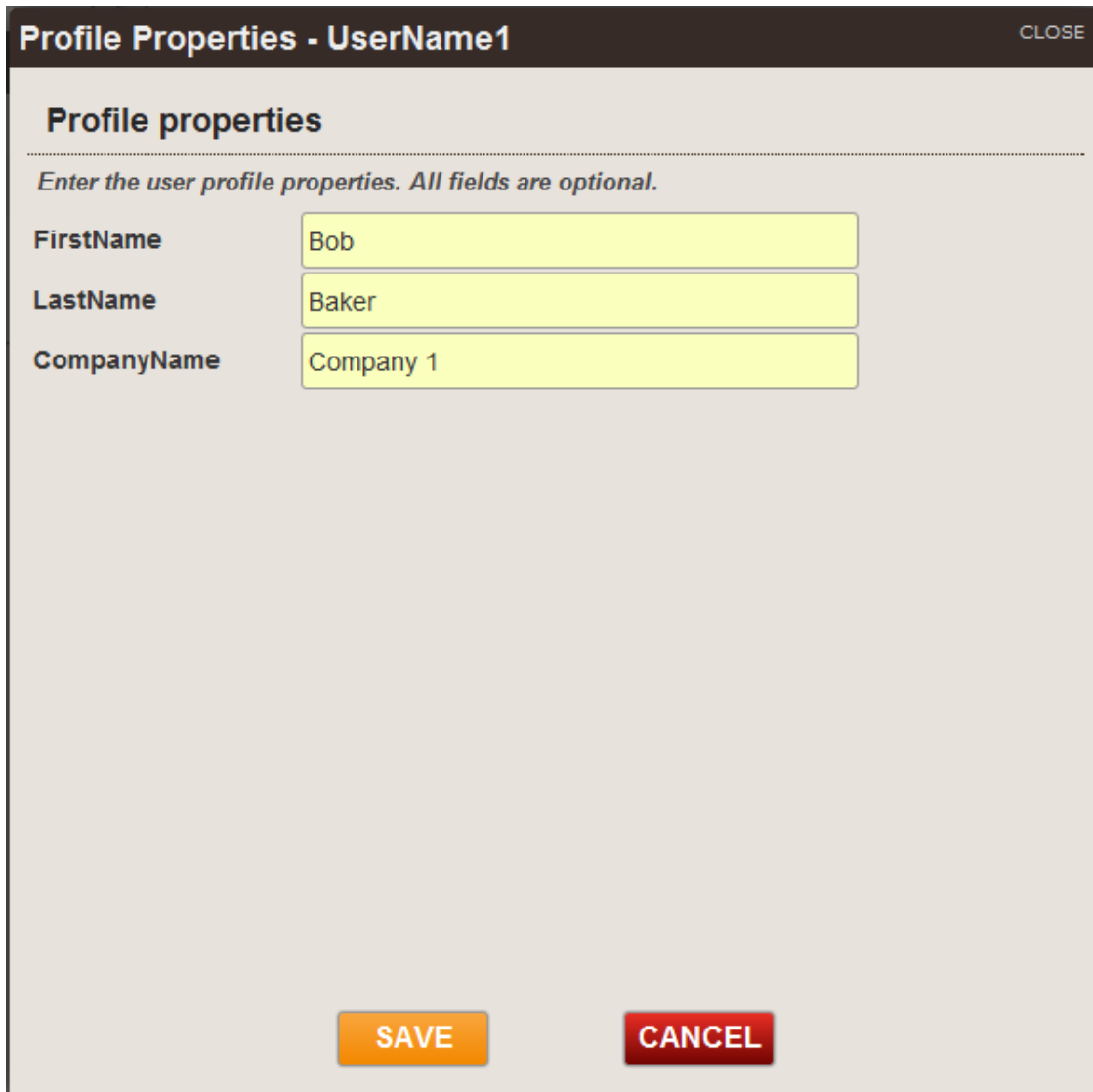
Confirm password 4

Login Information/Credentials

All Checkbox users must be assigned a unique username and password upon creation. In order to track exactly which user submitted which response, a respondent must be logged into Checkbox at the time of taking the survey.

1. Unique username & password
2. User email address (this is the email address Checkbox will use when deploying email invitations)

3. User GUID
4. Automatic Login URL (unique URL used to automatically log user into a Checkbox account. Save this URL to your desktop or bookmark it for quick and easy login!)



Profile Properties - UserName1 CLOSE

Profile properties

Enter the user profile properties. All fields are optional.

FirstName

LastName

CompanyName

SAVE **CANCEL**

Profile Properties/User Attributes

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

The screenshot shows the 'Settings' sidebar on the left with 'Profile Properties' selected. The main area displays 'Profile Properties' with a table of existing properties and a form to add a new one. The table has columns for 'Property name', 'Move up', 'Move down', 'Delete', and 'Attribute is hidden'. Existing properties include 'FirstName', 'LastName', and 'CompanyName'. A new property 'PhoneNumber' is being added in the form below the table, indicated by a red box and a circled '4'. A red arrow points from the 'Profile Properties' menu item to the table area, indicated by a circled '3'.

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

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.

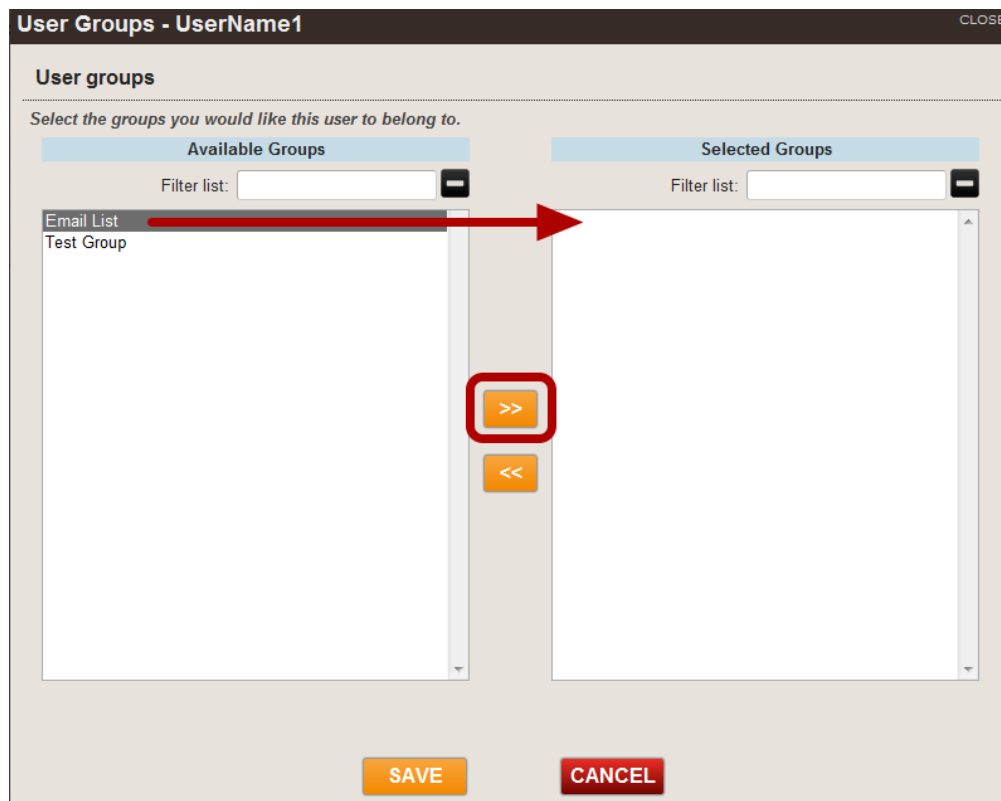
1. Navigate to the **Settings Manager**
2. Expand the **User Settings** menu
3. Select **Profile Properties**
4. Enter your new Profile Property label in the available text field and select the '+' icon

The dialog box is titled 'User Roles - UserName1' and contains a section for 'User roles'. Below the title, there is a instruction: 'Select the roles you would like this user to have. You must select at least one role.' A list of roles follows, each with a checkbox: 'System Administrator', 'User Administrator', 'Survey Administrator', 'Respondent' (checked), 'Report Viewer', 'Report Administrator', 'Survey Editor', and 'Group Administrator'. At the bottom, there are 'SAVE' and 'CANCEL' buttons.

User Roles

Assign 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)



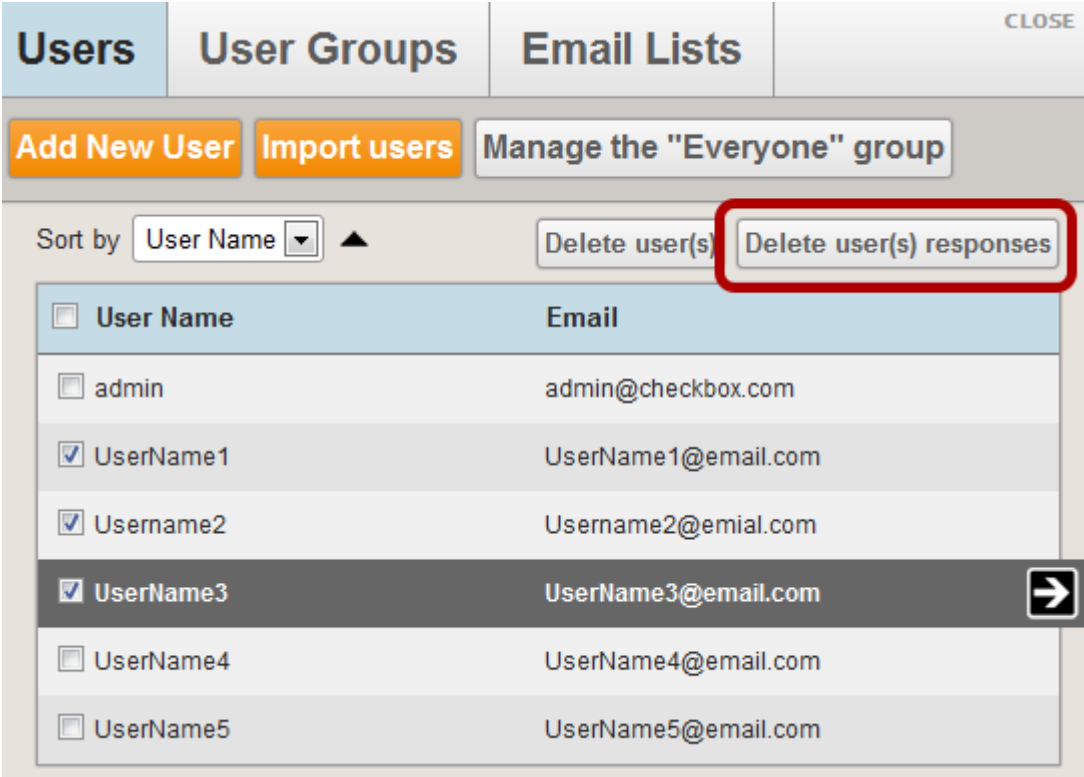
Group Memberships

From this window you have the ability to add and remove a user from existing user groups.

To add an existing user to a group, 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 selected group into the **Selected Groups** list on the right. A user is a member of all of the groups listed under Selected Groups.

To remove an existing user from a group, select the group from the Selected Groups list on the right. Use the directional arrows in the center of the window to move the selected group into the Available Groups list on the left. A user is not a member of any groups listed under Available Groups.

Delete User Responses



The screenshot shows the 'User Groups' tab of the User Manager interface. At the top, there are tabs for 'Users', 'User Groups', and 'Email Lists', along with a 'CLOSE' button. Below the tabs are three buttons: 'Add New User', 'Import users', and 'Manage the "Everyone" group'. A 'Sort by' dropdown menu is set to 'User Name' with an upward arrow. To the right of the dropdown are two buttons: 'Delete user(s)' and 'Delete user(s) responses', with the latter highlighted by a red rectangle. Below these buttons is a table with two columns: 'User Name' and 'Email'. The table contains six rows of user data. The third row, 'UserName3', is selected, indicated by a checked checkbox and a dark background. A right-pointing arrow button is visible to the right of this row.

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

If you wish to delete the all survey responses for one or more user(s) follow the steps below:

1. Check the box to the left of the user(s) whose responses you wish to delete. You may select more than one record
2. Select the **Delete User(s) Responses** button

Users Groups

The screenshot shows the 'checkbox SURVEY SOLUTIONS' interface. The top navigation bar includes 'SURVEYS', 'USERS', 'STYLES', 'LIBRARIES', and 'SETTINGS'. A search bar and a user profile 'admin' are also visible. The main content area is divided into three tabs: 'Users', 'User Groups', and 'Email Lists'. The 'User Groups' tab is active, showing a list of groups on the left and a detailed view of the 'Test Group' on the right. The 'Test Group' view includes a menu with 'Properties', 'Add Members', 'Security', and 'Copy Group', with a red arrow pointing to the 'Copy Group' button. Below the menu is a 'Members' section with a table of users and their email addresses.

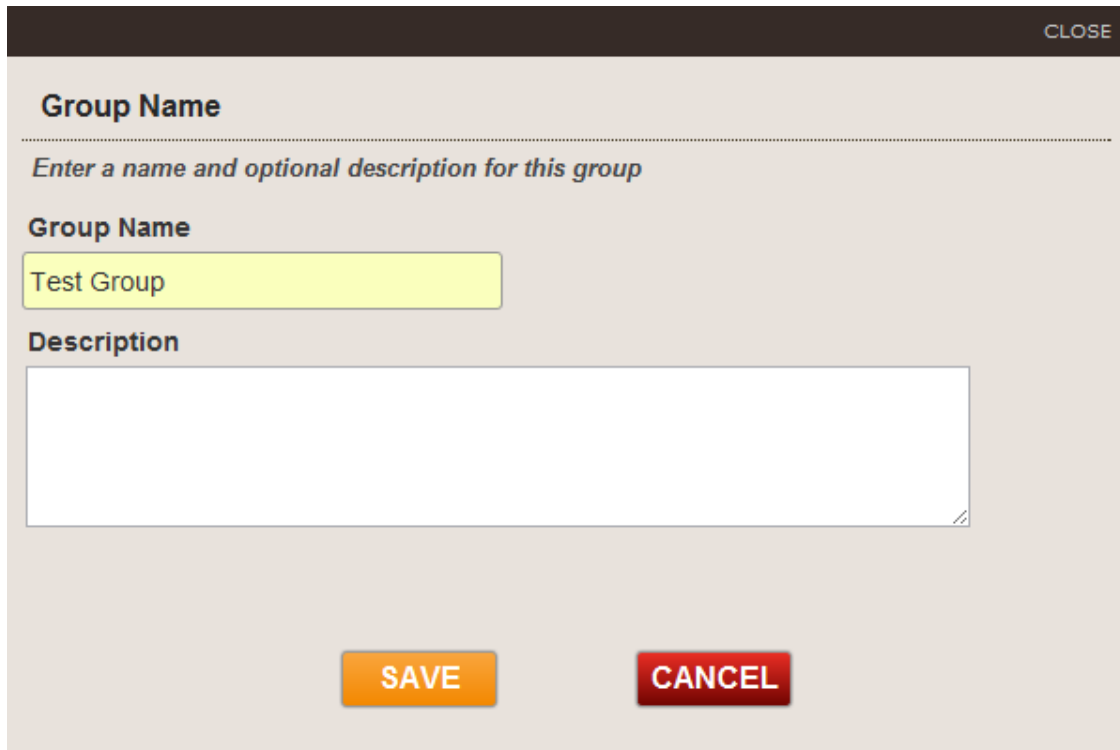
Group Name	Member Count
Email List	1
Test Group	5

User Name	Email
UserName1	UserName1@email.com
UserName2	UserName2@email.com
UserName3	UserName3@email.com
UserName4	UserName4@email.com
UserName5	UserName5@email.com

Select the **User Groups** tab to add and manage groups of Checkbox users.

When the User Groups view is open you will see a list of existing user groups on the left side of the window. Select a user group from the list to view a list of existing group members in the right-hand dashboard. From the dashboard menu on the top-right you are able to modify:

1. Group Properties
2. Add Members
3. Security
4. Copy Group



Group Name

Enter a name and optional description for this group

Group Name

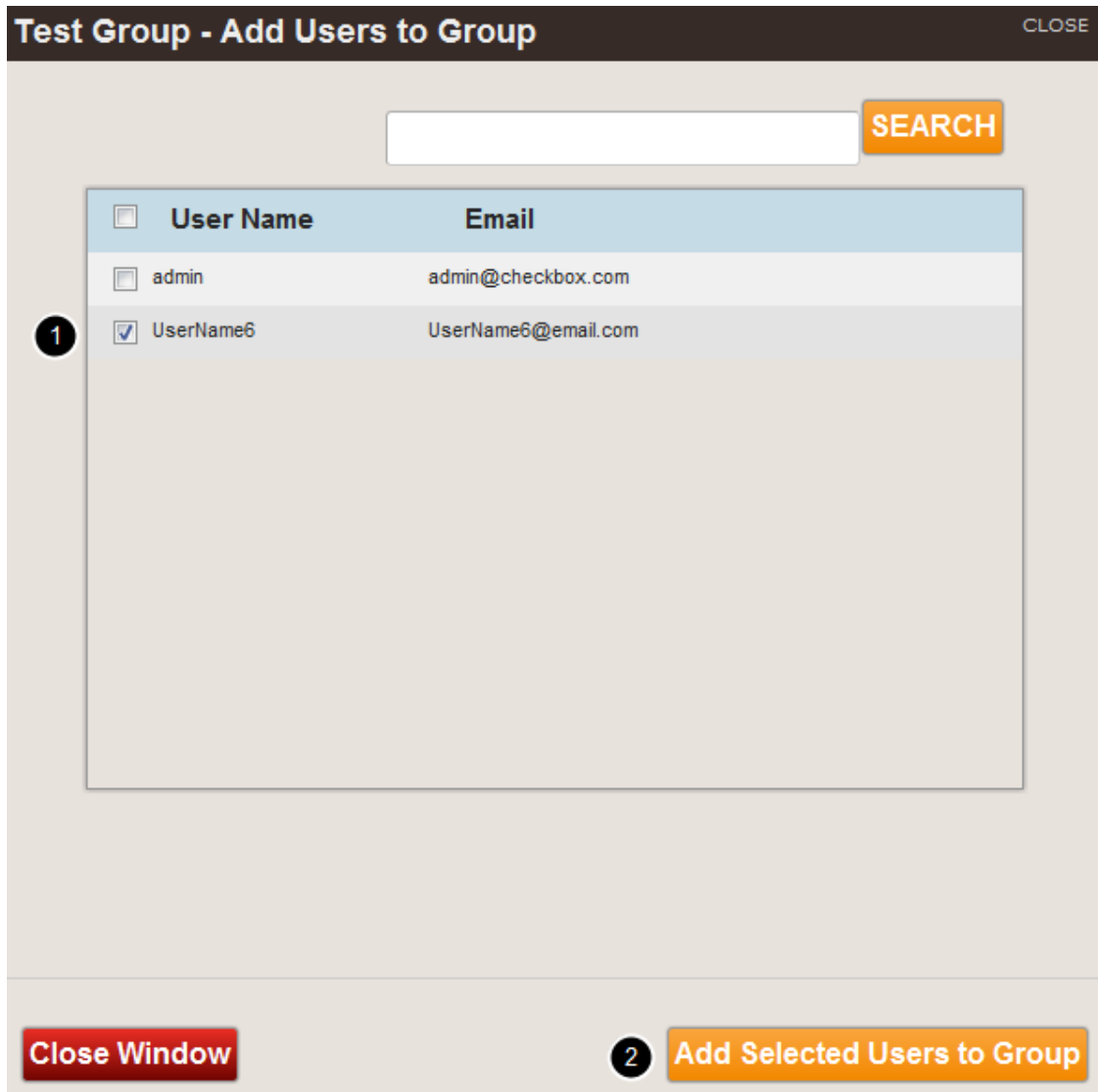
Test Group

Description

SAVE **CANCEL**

Group Properties

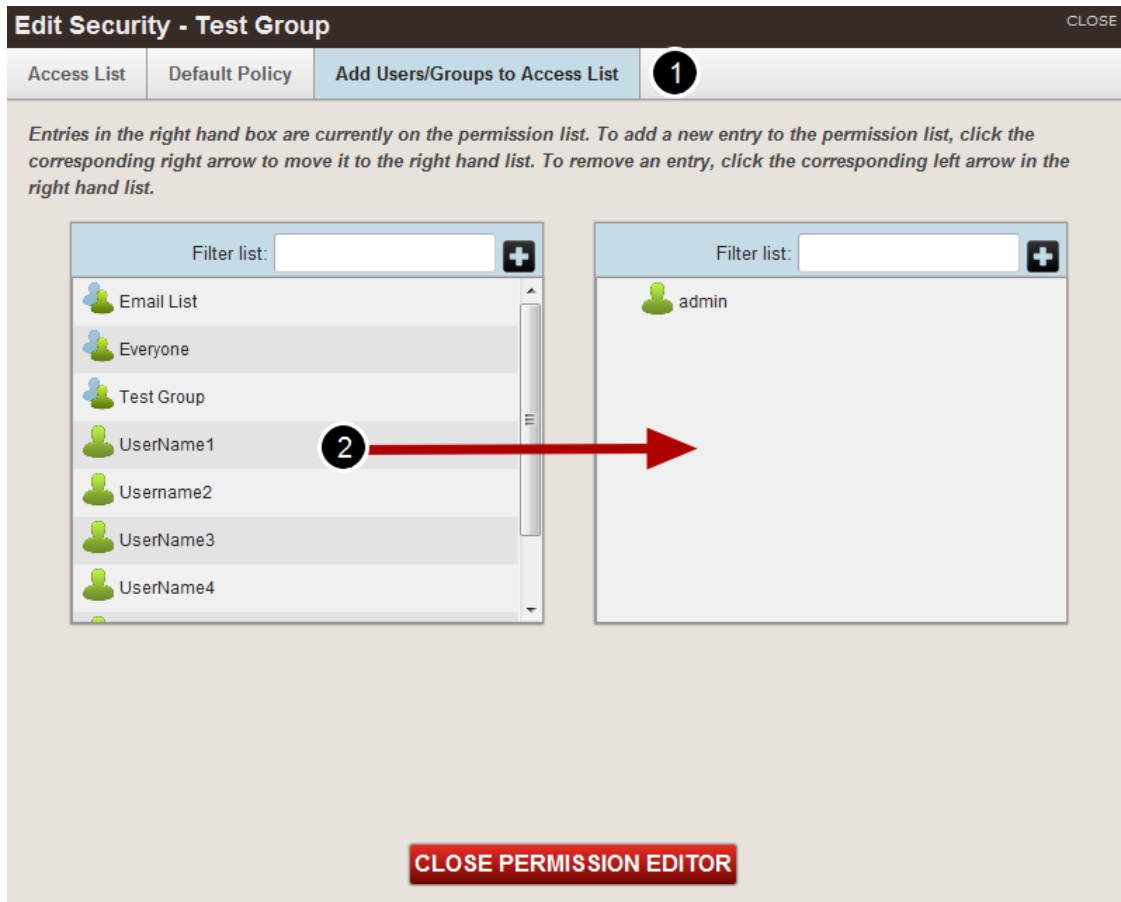
Select Properties to modify the group **Name** and group **Description** text of an existing user group.



Add Members

Select Add Members to choose from a list of available existing Checkbox users. To add a user follow the steps below:

1. Check the box to the left of the record(S)
2. Click the button labeled **Add Selected Users to Group**

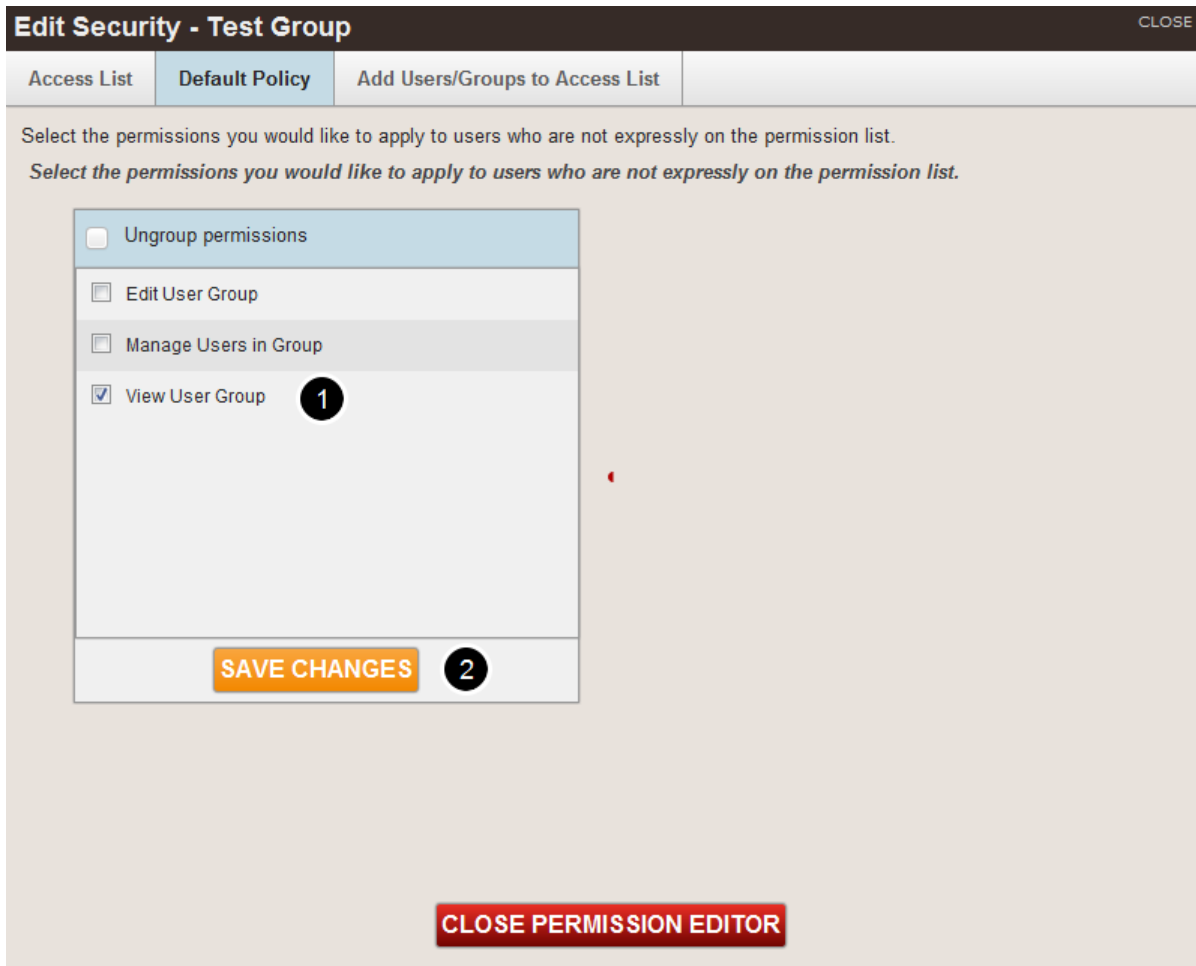


Security

User Group security allows you to control whom has access to a particular user group. From this window you can add users and user groups to an Access Control List (ACL). Only the group creator and those Checkbox users/groups included on the user group ACL will be able to view this particular group.

To add members to the ACL follow the steps below:

1. Select the tab labeled '**Add Users/Groups to Access List**'. You will see two boxes. The box on the left contains all available users and user groups. The box on the right contains users/groups whom have been added to the ACL.
2. To add a new ACL member, click on a record in the box on the left. This should automatically add them to the box on the right, which contains ACL members.



The **Default Policy** tab is where you can set permissions that apply to all Checkbox users not included on the ACL.

For example, let's say you want UserName1 to have full access to this particular user group but you want the rest of your Checkbox user database to only be able to view the group and not modify it in any way. To create this permission scenario you would need to follow the steps below:

1. Add UserName1 to the **ACL** (make sure the user has a role designation as either a System Admin or Group Admin)
2. Modify your **Default Policy** by checking the box labeled "View User Group"
3. **Save** your changes

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

The screenshot shows the 'Test Group Copy 1' window in the Checkbox 5 User Manager. The window has tabs for 'Properties', 'Add Members', 'Security', and 'Copy Group'. The 'Copy Group' tab is selected and highlighted with a red box. Below the tabs, there are buttons for 'Remove Selected' and 'Remove All Users from Group'. A table lists members with columns for 'User Name' and 'Email'.

User Name	Email
UserName1	UserName1@email.com
UserName2	UserName2@email.com
UserName3	UserName3@email.com
UserName4	UserName4@email.com
UserName5	UserName5@email.com

Copy Group

To copy an existing group, select that group and click the **Copy Group** button on the top-right of the window. This will automatically add a duplicate group to your user group list. The copied group will have the same name as the original group with the addition of "Copy 1."

To change the name of the copied group, select it and open the **Properties** window.

Email Lists

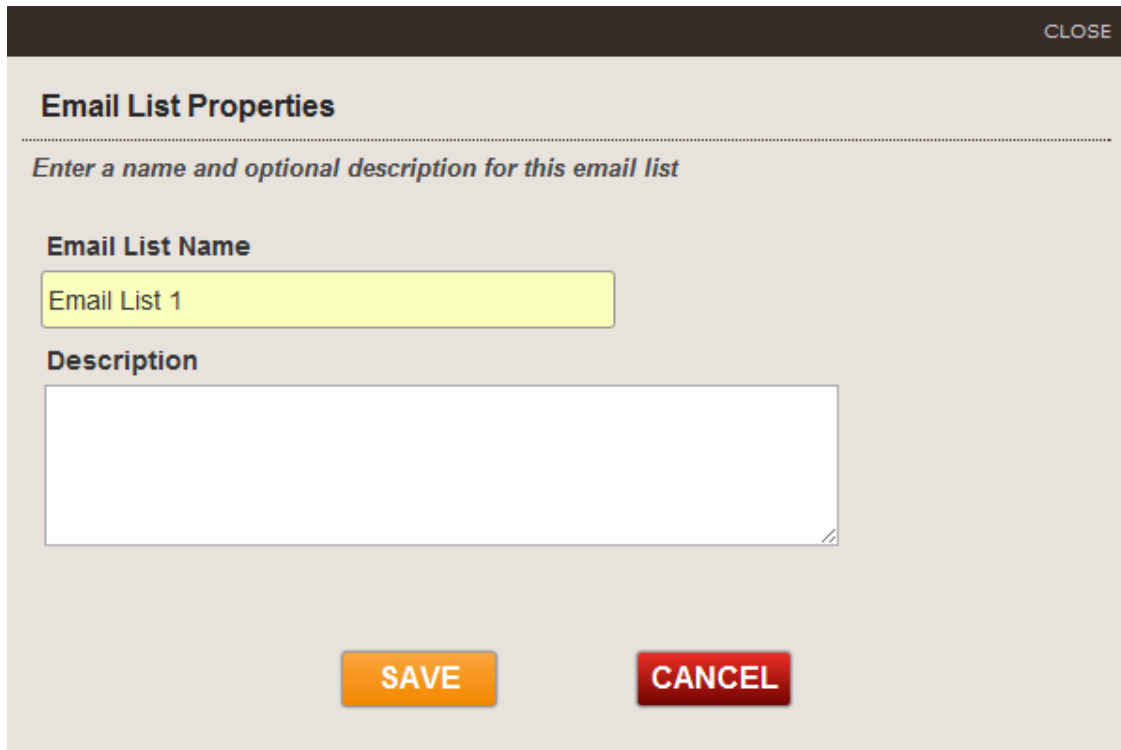
The screenshot shows the 'Email List 1' window in the Checkbox 5 User Manager. The window has tabs for 'Properties', 'Add Addresses', and 'Security'. The 'Add Addresses' tab is selected and highlighted. Below the tabs, there is a button for 'Delete Selected'. A table lists email addresses with a column for 'Email Address'.

Email Address
user1@company.com
user2@company.com

Create and manage list of email addresses in the **Email Lists** view. Email Lists are used to send survey invitations to individuals without having to create user profiles (login credentials) for them. Email list entries do not contain user attributes or login credentials.

When the Email List view is open you will see a list of existing email lists on the left side of the window. Select an email list to view the email addresses included on that email list in the right-hand dashboard. From the dashboard menu on the top-right you are able to modify:

1. **Properties**
2. **Add Addresses**
3. **Security**



Email List Properties

Enter a name and optional description for this email list

Email List Name

Email List 1

Description

SAVE CANCEL

Email Properties

Select Properties to modify the email list **Name** and **Description** text of an existing email list.

Add Addresses to Email List - Email List 1 CLOSE

Data Source Review Finish

Data source

Upload Text file

Copy/Paste text entry

Enter text

Enter e-mail address list

```
email1@email.com
email2@email.com
```

Text encoding

ASCII

Unicode (UTF-8)

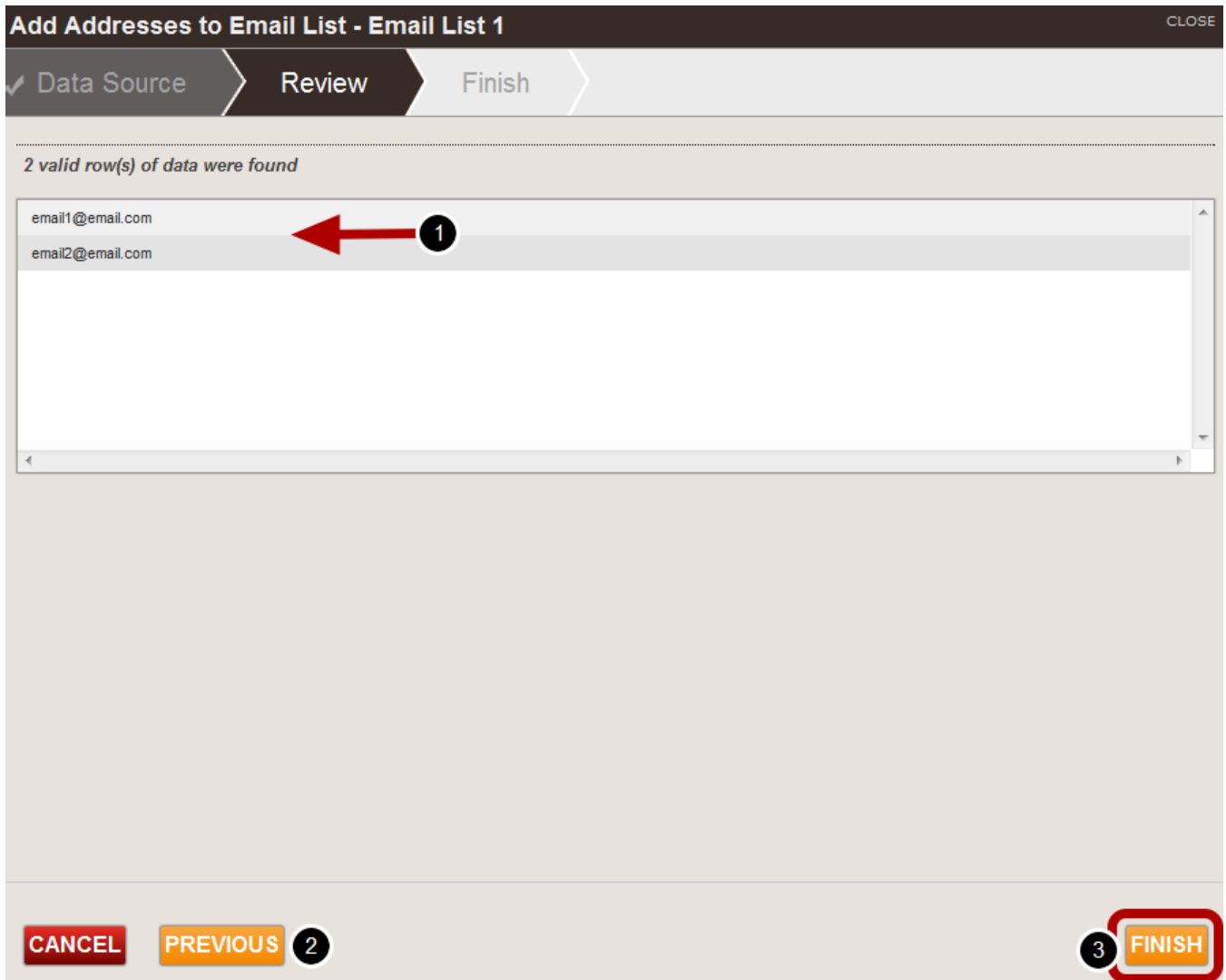
CANCEL **NEXT**

Add Addresses

Selecting the Add Addresses menu option opens a window where you can select the data source for your new email addresses. You have two options for adding email addresses:

1. **Upload Text File** - Choose this option if you have a file on your computer you wish to upload
2. **Copy/Paste Text Entry** - Choose this option to cut and paste a list of email addresses from a text file, or to manually enter email addresses line by line

When you have added the new email addresses select **Next** to continue in the wizard.










1. Review the email addresses you selected
2. If you need to add or modify the email address select **Previous** to return to the previous screen
3. When you are satisfied with your changes select **Finish** to add the email addresses to the existing list

Edit Security - Email List 1 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
-  Test Group
-  Test Group Copy 1
-  UserName1
-  Username2
-  UserName3

Filter list: +

-  admin

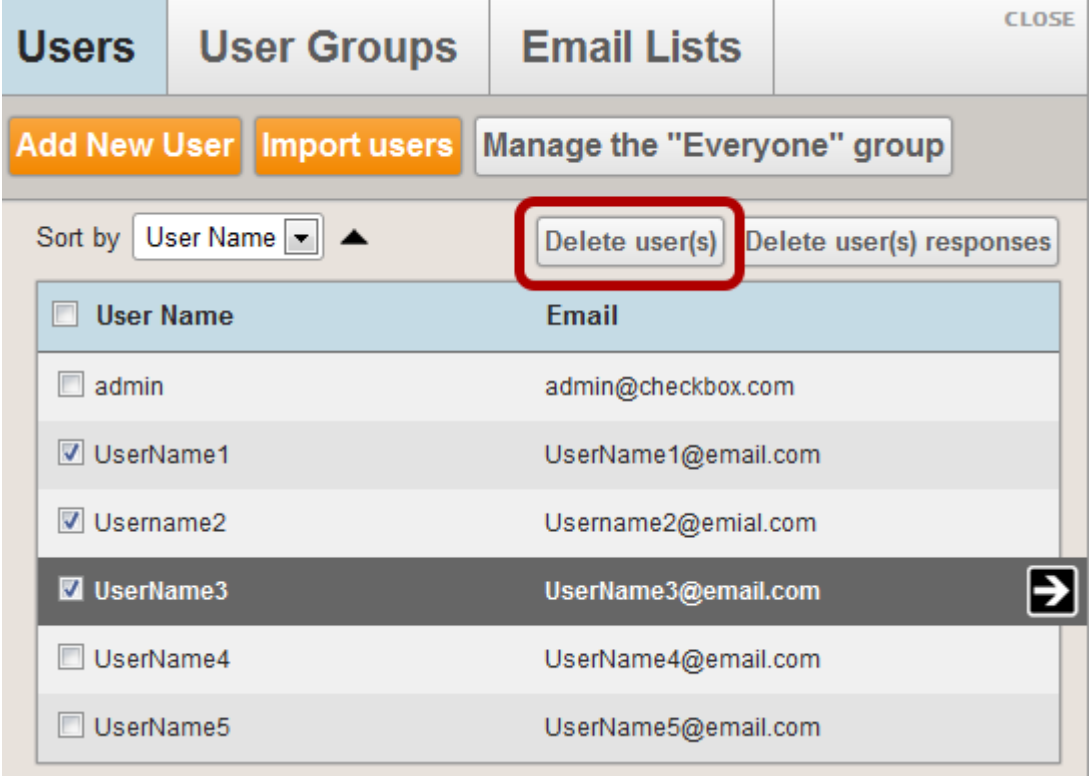
CLOSE PERMISSION EDITOR

Security

Email List security allows you to control whom has access to a particular email list. From this window you can add users and user groups to an Access Control List (ACL). Only the email list creator and those Checkbox users/groups included on the user group ACL will be able to view this particular email list.

See User Group Security above for more information on adding users to an ACL and setting Default Policies.

Delete a Record

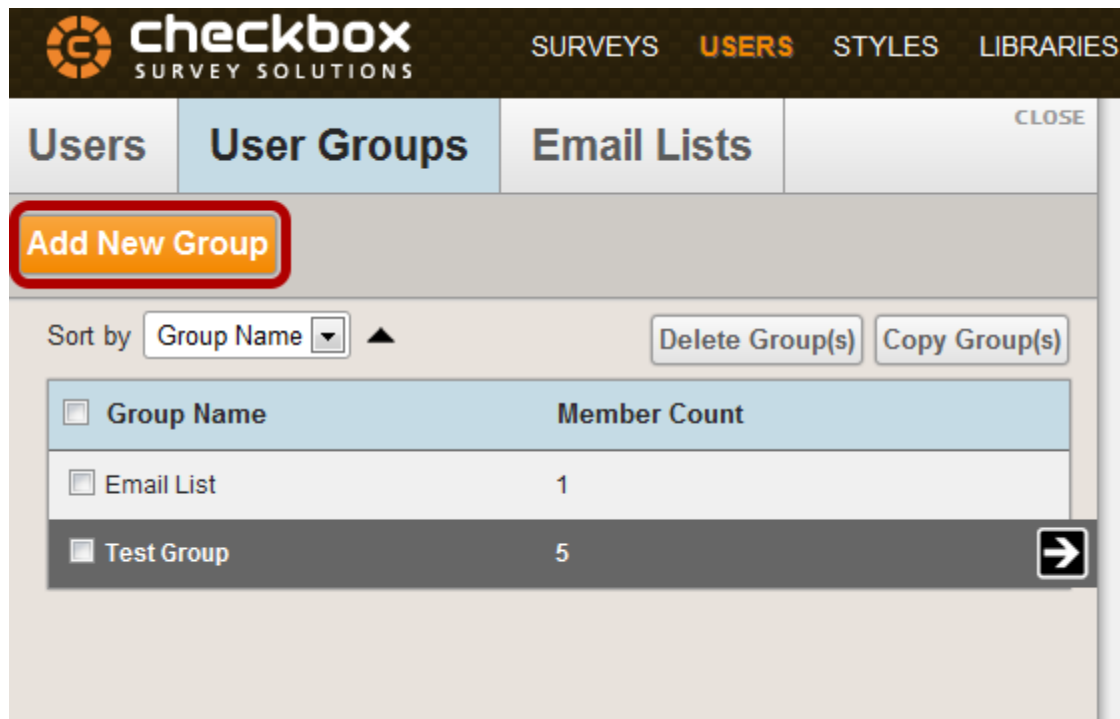


The screenshot shows the 'Users' tab in the Checkbox 5 User Manager interface. At the top, there are tabs for 'Users', 'User Groups', and 'Email Lists', with a 'CLOSE' button on the right. Below the tabs are three buttons: 'Add New User', 'Import users', and 'Manage the "Everyone" group'. A 'Sort by' dropdown menu is set to 'User Name'. A red box highlights the 'Delete user(s)' button, with 'Delete user(s) responses' to its right. Below this is a table with two columns: 'User Name' and 'Email'. The table contains six rows of user records. The first row is 'admin' with email 'admin@checkbox.com'. The next three rows are 'UserName1', 'Username2', and 'UserName3', all with email addresses ending in '@email.com'. The 'UserName3' row is highlighted in dark grey and has a right-pointing arrow button next to it. The last row is 'UserName4' with email 'UserName4@email.com', and the final row is 'UserName5' with email 'UserName5@email.com'. Each row has a checkbox in the 'User Name' column.

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

If you wish to delete one or more user(s), user group(s), or Email List(s) follow the steps below:

1. Check the box to the left of the record (user/group/email list) you wish to delete. You may select more than one record
2. Select the **Delete** button



The screenshot shows the 'checkbox5 SURVEY SOLUTIONS' interface. The top navigation bar includes 'SURVEYS', 'USERS', 'STYLES', and 'LIBRARIES'. The 'USERS' section is active, with sub-tabs for 'Users', 'User Groups', and 'Email Lists'. A 'CLOSE' button is visible in the top right of the sub-tab area. Below the tabs, an orange button labeled 'Add New Group' is highlighted with a red border. Below this button, there is a 'Sort by' dropdown menu set to 'Group Name' with an upward arrow. To the right of the dropdown are two buttons: 'Delete Group(s)' and 'Copy Group(s)'. Below these controls is a table with two columns: 'Group Name' and 'Member Count'. The table contains three rows: 'Email List' with a member count of 1, and 'Test Group' with a member count of 5. A right-pointing arrow icon is located at the end of the 'Test Group' row.

<input type="checkbox"/> Group Name	Member Count
<input type="checkbox"/> Email List	1
<input type="checkbox"/> Test Group	5

Add New User Group

To add a new user group select the orange button labeled **Add New Group**.

CLOSE

Group Name

Review

Finish

Group Name

Enter a name and optional description for this group

Group Name

Test Group 2 1

Description

2

CANCEL

3 NEXT

Name Group

1. Create a Group **Name** (required)
2. Add a group **Description** (optional)
3. Select **Next** to review your settings

CLOSE

✓ Group Name Review Finish

Ready to create group

Please review the information below to ensure it is correct

New group properties	
Group Name	Test Group 2
Description	

CANCEL PREVIOUS FINISH

Review Information

1. **Review** your group settings
2. If you wish to change the group name or description, select the **Previous** button to return to the previous step
3. Select **Finish** to save your new group

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