Checkbox 6 Quick Start Guide

This guide provides an overview of the steps taken to create, share, and analyze a simple survey using Checkbox 6.

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Getting Started

Log into Checkbox by entering first your **Username** and **Password**.

After entering the correct login credentials, select **Login** to open your Checkbox account.

CHECKBOX TIP: If you forgot your password, select the "Forgot password" link for assistance.
When you first login to Checkbox Survey you will see some or all of the above menu options. The options available to you are dependent on the user role(s) associated with the user account you are logged in with. A System Administrator should see all of the above menu options.

How to Create a Simple Survey

To begin the survey creation process, select **Surveys** from the main application menu. This will bring you to the **Survey Manager**.

Once in the Survey Manager, select the **+ Survey** button to add a new survey.
Name your survey.

On this window you also have the ability to enable scoring, apply style templates, and move the survey into an existing folder. In the example above we have left all settings to their defaults. These settings can be configured later from within the Survey Editor.

Save your survey settings to enter the Survey Editor.
All new surveys are pre-populated with three pages:

- Hidden Items
- Page 1
- Completion Events

These pages can be found in the survey navigation pane on the left side of the Survey Editor. As you add more pages and items to your survey, this section will grow.

Use the arrows on the left side of the page bar to expand that page.
A live preview of your survey is available to the right of the survey navigation pane. The preview will update as you add pages and items to your survey. You can return to this preview at any point during survey creation by clicking the Survey Preview button at the top of the window.

To add a survey item to Page 1, select + Item on the page bar.
A window will appear. Select a survey item from one of the four item categories:

- Question Items
- Display Items
- Action Items
- Report Items

In the example above we selected the Radio Button item type from the Question Items category.

Select Next to continue.
Configure your Radio Button question using the **editor tabs**. Go through each tab in the editor and configure as desired.

**NOTE:** Item editor options vary depending on item type.

*For more information on question items, view the Question Items Guide here >>*
Enter text in the field provided on the **Question Text** tab.

Text can be entered using either the **HTML** or **Text** view options. The HTML view is being used in the example above.

**NOTE:** If you are cutting and pasting text from another application, be sure to paste the text into the Text view, not the HTML view. Pasting into the HTML view may pick up formatting from the external document that is not compatible with Checkbox. Pasting into the Text view will paste it as plain text. You may then toggle back to the HTML view to apply formatting using the editor toolbar.
Move to the **Choices** tab and add the possible answer options for the question you just entered.

After entering an answer choice into the text field provided, select the orange "+" icon to save it. A new answer choice field will appear.

In the example above we only configured Question Text and Choices. All other item properties were left to their defaults.

**Save** your item to return to the survey.
Page 1 now has one item!

To modify an existing item, select it from the survey navigation pane to expand its Item Editor. This editor is the same as the initial editor you used to create the item. Go through each tab 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. Do not navigate away from the item before saving your changes.
Experiment with your survey by adding new pages and items, and by trying out each setting in the different item editor tabs.

For more information on question items, view the Question Items Guide here >>

Don't forget to check the progress of your survey using the **Survey Preview** button at the top of the Survey Editor.
How to Add/Change Style

Select **Settings** at the top of the Survey Editor and move to the **Appearance** tab.

Choose from existing **Web**, **Tablet**, and **Mobile** style templates using the drop-down menus.

If a style is selected for Tablet or Mobile, Checkbox will automatically apply the appropriate survey style depending on what device a respondent is using to take the survey. If no style template is selected for Tablet or Mobile, Checkbox will display the default (Web) style.

**NOTE:** To create a new style, navigate to **Styles** on the main menu.

For more information on building survey style templates, view the Style Guide here >>
Enable appearance options for your survey by switching the setting button into the "on" position.

NOTE: If "Display Survey Title" is enabled, the title text can be modified under the Languages & Text tab.

Changes will save automatically.

CHECKBOX TIP: Hover over a blue question mark for setting details.

For more information on survey appearance settings, view the Style Guide here >>

Preview your new style by selecting Survey Preview.
Select the **Survey Actions** drop-down on the right side of the Survey Editor.

Select **Launch** to begin the survey launch process.

The Launch Wizard streamlines the process of readying your survey for deployment by walking you through:

- Survey Permissions
- Response Options
- Response Limitations
- Sharing Options

At the end of the Launch Wizard your survey will be active and ready to collect responses.

**NOTE:** Survey permissions, response options, and activation settings can also be configured manually from the **Survey Editor >> Settings** menu.
After selecting the Launch button, a window will appear. The first step is to select a survey response permission type. **Survey permissions** allow you to control whom can take your survey and whether respondents will be captured as "anonymous" or "known."

CHECKBOX TIP: When you select a survey permission type, an explanation the permission type will appear on the right side of the window. Be sure to read through all of the options before making a selection.

When you have selected a permission type, select **Next** to continue to Options.

For more information on permissions, view the Permissions Guide here >> [COMING SOON]
On the Options step of the Launch Wizard you have the ability to:

- 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.
- Allow respondents to **edit previously completed responses**. Enabling this option means that respondents will have access to their survey response after initial submission.
- 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.
- **Anonymize responses**, which means that all respondents will be captured as anonymous regardless of whether or not they are registered Checkbox users.
- **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.

Select **Next** to save your changes and continue. Select **Previous** if you wish to return to Permissions.
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 a **response start and end date**. NOTE: A survey must be set to active prior to the response start date.

Select **Next** to save your changes and continue. Select **Previous** if you wish to return to Options.
Confirm your launch settings and select Finish to view sharing options.

NOTE: If your survey wasn't set to "active" before starting the Launch Wizard, it will automatically activate as soon as the Finish button is clicked.
On the **Share** step you are provided with several options for distributing your survey to potential respondents:

1. Copy the provided survey **URL** (if you created a custom URL you will see two URLs), to share your survey via personal email, web page, social media, etc.
2. Share the survey through your **Twitter** or **Facebook** networks. Select desired network and follow prompts.
3. **Embed** the survey into a web page by copying the IFrame tag provided.
4. Create and deploy a Checkbox **Email Invitation** to a group of potential respondents. If you select Send Invites you are brought to the Invitations Wizard where you can build an email invitation and invite users to respond to your survey.
5. At the bottom of the Launch Wizard window you also have the option to save your launch configuration and **Return to Survey Manager**.

NOTE: The above sharing options can also be reached directly from the Survey Manager under the **Share** menu.

For more information on sending email invitations, view the Email Invitation Guide here >>
You can also configure survey settings using the **Basic Info** and **Permissions** tabs in the **Survey Editor >> Settings** menu.
How To View/Analyze Responses

View Responses:

Return to the **Survey Manager** to view responses. Select the desired survey from the navigation pane on the left to expand that survey's **dashboard**. The dashboard displays a histogram of recent responses.

For a detailed view of collected responses, select **View Responses** from the **Results** drop-down in the survey dashboard.
NOTE: Responses highlighted in red are test responses.

Select a response to view an individual responses detail.
Data Export:

Select the **Export Responses** button at the top right of the Response Manager to view export options.

*For more information on export options, view the Export Guide here* >>

Generate Report:

To generate a visual representation of your survey response data, select **Summary Reports** from the **Results** drop-down in the survey dashboard.

*For more information on the Report Wizard, view the Report Wizard Guide here* >>

Thank you for viewing this Checkbox user guide. [Click here to return to Checkbox Resources] >>