

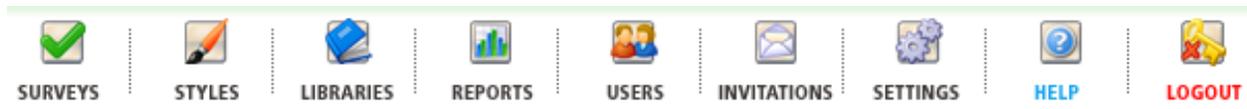
This guide will provide step-by-step directions in order to help you get started with Checkbox Survey

Contents:

- Overview
- How to create a survey
- How to publish a survey
- How to analyze a survey
 - How to create a report
 - How to export data from Checkbox
- Conclusion

Overview:

When you first login to Checkbox Survey, you will see some of the following options available depending on which version you are using (Current Release, Private Demo or Public Demo) and the roles attached to the current user account you are using.

**How to create a survey:**

Here we will walk you through how to create a new survey, name it, and add some basic survey items.

1. Login to Checkbox
2. Select the 'Surveys' button  from the application toolbar
3. Select 'New Survey' button 
4. Enter a name and description for your survey and click 'submit'
5. The screen as pictured below will appear:

Home → Survey Manager → Survey Editor

Survey Editor - Sample Current St

Survey Manager | Survey Editor | Style | Properties | Permissions | Activation | Languages | Test Survey

New Page |
 Preview |
 Print |
 Export

Vi

Page 1
Add Item
Copy | Move | Delete

Page Conditions:
 No conditions.

Branching Rules:
 No branching rules.

This page does not contain any items.

CHECKBOX
 Survey Software v4.7.1.43 (IP-0AD0A6CF) - Copyright ©2002-2010 Checkbox Survey Solutions, Inc.

6. Click 'Add Item' on the right hand side
7. You will see the 'Add Item to Survey' screen as pictured below

Add Item to Survey

Survey Manager | Survey Editor | Style | Properties | Permissions | Activation | Languages | Test Survey

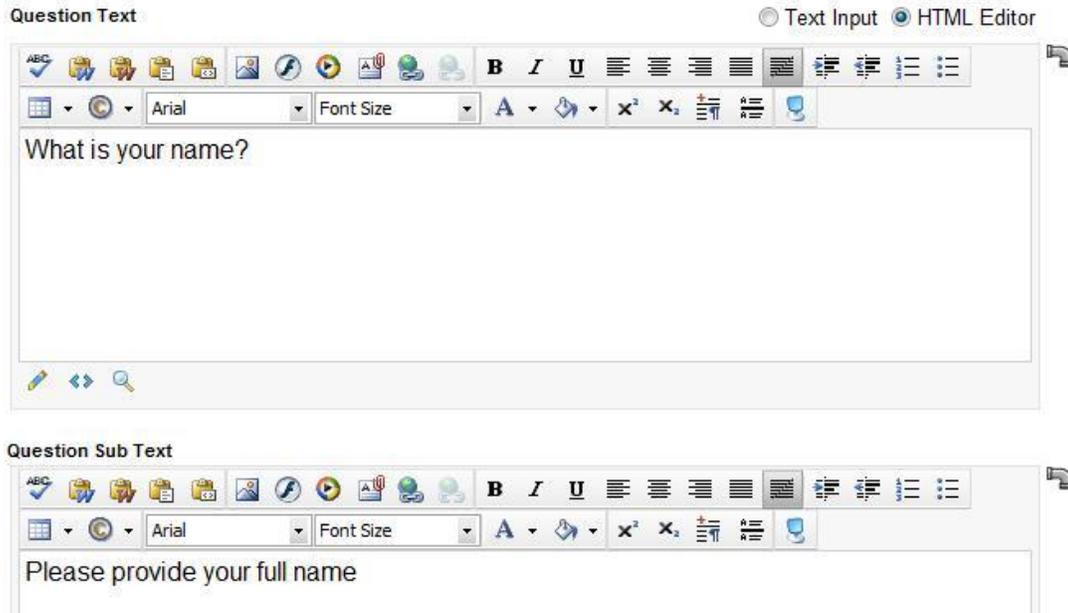
Add from library
 Import from XML

Question Items

Question items allow the respondent to enter answers.

Radio Buttons	List from which one option can be selected.
Drop Down List	A drop down menu from which one option can be selected.
Checkboxes	List from which multiple options can be selected
Rating Scale	Radio button scale consisting of consecutively numbered options
Matrix	A grid of questions.
Open-Ended Single-Line Text	Freeform text with formatting rules.
Open-Ended Multi-Line Text	Freeform text with in a box with a specified number of rows and columns.
File Upload	Display a File Upload input.
CAPTCHA	Display a CAPTCHA input that must validate for the survey to proceed.

8. For this example, choose an 'Open-Ended Single-Line Text' question
9. Fill out the following fields



10. Scroll to the bottom of the page and click 'OK' , your item will appear as below:



11. Now you can add and experiment with a few more 'Questions' and 'Display' items by clicking 'Add Item' again
12. To add a custom style to your survey you can select 'Style' from the black menu bar and choose a 'Style Template' from the drop down list. Click 'Submit' at the bottom of the page and then return to 'Survey Editor' where you can then 'Preview' the style.
13. Finally, you can select whether you want your survey to be 'Public' or restricted in some way. By default, all surveys are public. Select 'Permissions' from the black menu bar.
14. Leaving the security as 'Public' will enable any person who receives the survey URL to respond. Only if you want to restrict users will you want to utilize the other options. (For any further information on any of the following topics please review our **Permissions Guide**)

Permissions - Sample



Survey Security

- Public
- Password Protected
- Access List
- All Registered Users
- Invitation Only

How to publish a survey:

Now that you have added questions to this survey, you will want people to fill it out. Before you issue the survey to your respondents you will want to first 'test' and then 'activate' your survey.

1. With the survey you have created open in the main window, select 'Test Survey' from black menu bar



2. This will bring you to a page and a URL that can be clicked on so that you can test the functionality, look, and feel of the survey.

A yellow background containing a survey question: '*What is your name? Please provide your full name'. Below the question is a white text input field. At the bottom left of the yellow area is a blue button with the text 'Finish'.

3. Now, select 'Activation' from the black menu bar and activate your survey. This will make your survey accessible to people who receive the survey URL.

4. Before sending out a survey, make sure you send a 'test' survey to a group of internal employees so that any spelling errors or grammatical mistakes are identified by someone other than the survey creator.
5. Now you can invite respondents in one of the following ways:
 - Send the actual link in an emailFor example: <http://demo.checkbox.com/Samples/Survey.aspx?s=522example>
 - Embed in HTML on a webpage
Please Take Our Survey (use example code on next line)
Please take our Survey
 - Use the Invitation Management Interface within Checkbox

How to analyze a survey:

By this stage you will have designed a survey and sent it out to respondents. Next, you will want to be able to see the results and interpret the data. There are three ways in which you can view data:

- Look at the raw responses
- Create reports within Checkbox
- Export the data and view using other statistical analysis tools

How to view raw responses:

1. Click on 'Reports' icon 
2. Click on the  icon and select 'View Responses' 
3. This page will allow you to view:
 - Response ID
 - User Name
 - Completion date & timestamp
 - Responses
4. You will also be able to edit the following:
 - Respondent answers
 - Delete selected responses*
 - Delete all responses*
 - Delete all test responses

**Deleting responses is good for when you rollout a survey in multiple phases (after you've saved the first round of results). Also, it can be used to start fresh or after the testing phase of a survey.*

Survey Response List

Reports Report List Responses Export Results Report Filters

« « 1 » » Username  

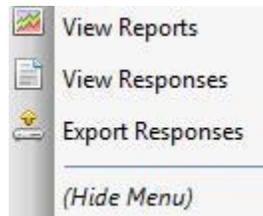
Display Incomplete Responses

ID	Username	GUID	Started	Completed	Test Response	View	Edit	Delete
7965	AnonymousRespondent	13364a31-cae0-4963-9a0a-758c69811286	10/14/2009 11:51:47 AM	10/14/2009 11:52:33 AM				
7985	AnonymousRespondent	f2eb1512-3be4-4077-8f27-f72f05e197af	10/14/2009 12:49:15 PM	10/14/2009 12:50:24 PM				
7986	AnonymousRespondent	8882bf3d-0e70-4599-9a75-48f93f3025b7	10/14/2009 12:53:21 PM	10/14/2009 12:53:40 PM				
8028	AnonymousRespondent	83dc3fde-a972-4a0b-b862-a713b7b96d41	10/14/2009 4:20:56 PM	10/14/2009 4:21:22 PM				

 Delete All Responses  Delete All Test Responses  Delete Selected Responses

How to create reports:

1. Click on 'Reports' icon 
2. Click on the  icon and select 'View Reports'



3. Click on the 'Report Wizard'  icon which will help you create a report.
4. The 'Report Wizard' allows you to set options relating to how the report should be displayed:
 - Change output settings based on Item Type (i.e. show a pie chart for radio button questions).
 - Change report name
 - Associate a style template to the report
 - Change item position
 - Ability to turn on aliases for simple, short names
 - Place all analysis on a single page
 - Set output settings and item type associations as default (must be logged in as Admin)
5. After you have made any changes, click the 'Generate' button
6. To the left of the survey name, click on the  icon and select 'Run' 

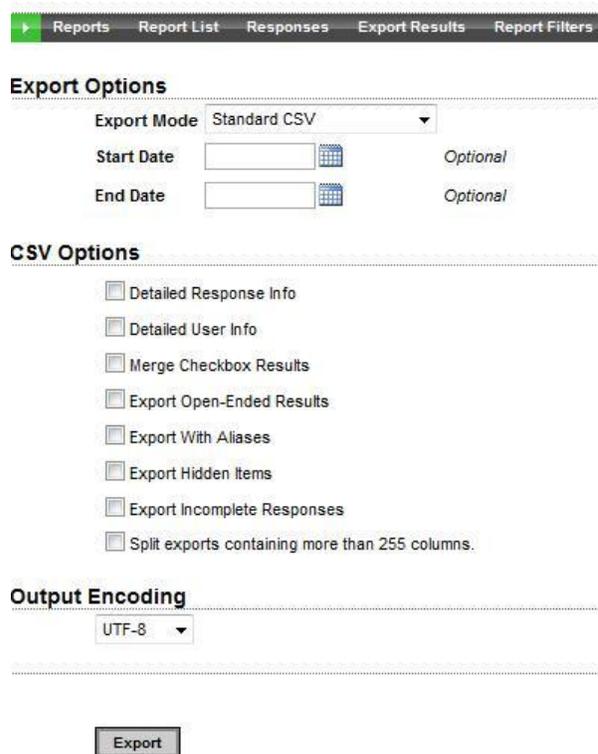
There are many other things you can do with reports that are not covered here, such as:

- Create a report from scratch
- Edit the report and add additional items
- Create and edit filters
- Run cross tab analysis

(For any further information on any of the following topics please review our **Reports How to Guide**)

How to export data from Checkbox:

1. Click on 'Reports' icon 
2. Click on the  icon and select 'Export Responses' 
3. Choose from the available options to select the output you require



Reports Report List Responses Export Results Report Filters

Export Options

Export Mode Standard CSV

Start Date  *Optional*

End Date  *Optional*

CSV Options

Detailed Response Info

Detailed User Info

Merge Checkbox Results

Export Open-Ended Results

Export With Aliases

Export Hidden Items

Export Incomplete Responses

Split exports containing more than 255 columns.

Output Encoding

UTF-8

Export

4. Select 'Export' at the bottom of the page.

Conclusion:

This Quick Start Guide has showed you how to create a simple survey, how to send it to your respondents and how to view your responses. For further in-depth instructions on the Checkbox product please review our following site here: <http://checkbox.com/training>.