# checkbox | QUICK START

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

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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.
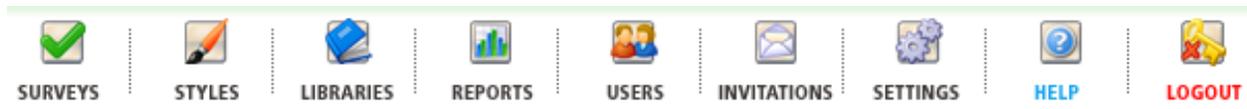
How to create a survey:

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:

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

8. For this example, choose an 'Open-Ended Single-Line Text' question
9. Fill out the following fields
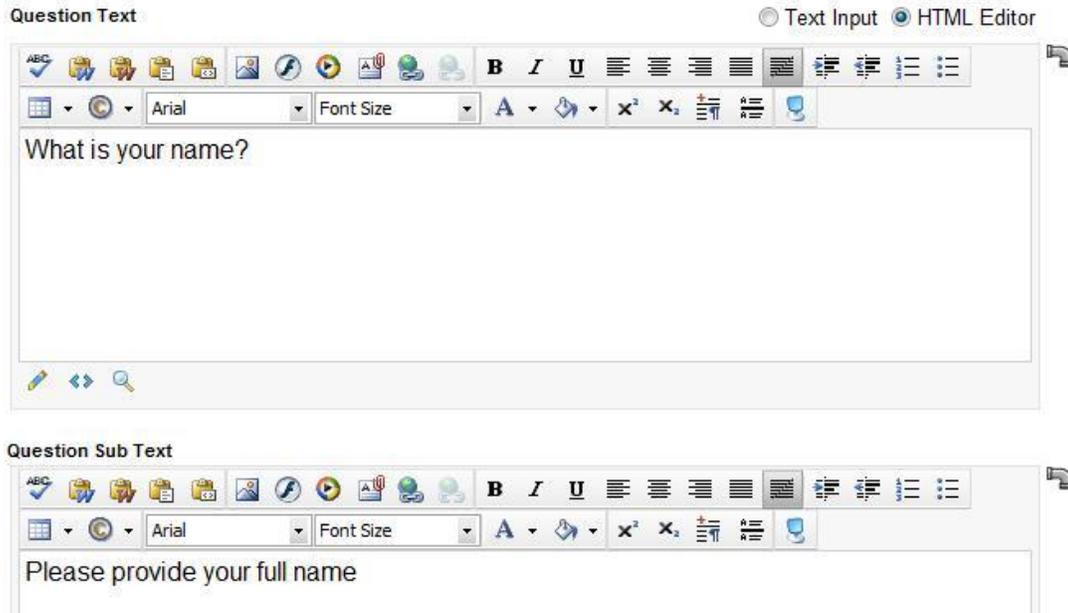
10. Scroll to the bottom of the page and click 'OK' , your item will appear as below:

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 Manager | Survey Editor | Style | Properties | Permissions |

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

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

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.

What is your name?
Please provide your full name

[   ]

[Finish]

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

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 email

   For 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

How to create reports:

1. Click on 'Reports' icon
2. Click on the icon and select 'View Reports'
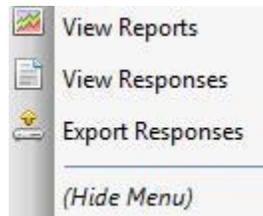
3. Click on the 'Report Wizard' icon which will help you create a report.
4. The 'Report Wizard' allows you to set options relating to how the report should be displayed:
   - Change output settings based on Item Type (i.e. show a pie chart for radio button questions).
   - Change report name
   - Associate 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
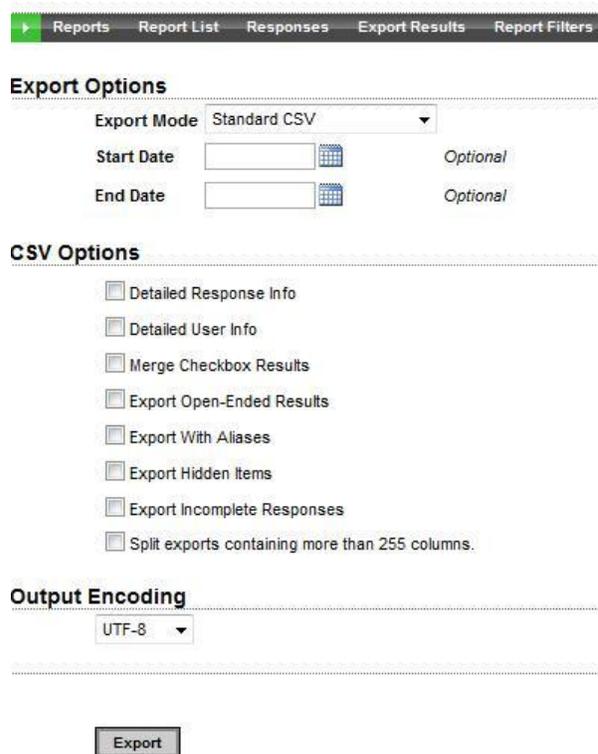
4. Select 'Export' at the bottom of the page.

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.