Miami's Quick Start Guide for Using

Prezza Checkbox Web

to Create and Publish Surveys to the Web

The CHECKBOX® Quick Start Guide

This guide will provide step-by-step directions to create, activate, and analyze a basic survey in Checkbox. These steps include the following tasks:

- **Create** – Edit your new survey, adding items and logic; stylizing the survey with images and colors.
- **Activate** – Test the survey internally, then activate (publish) the survey, and invite survey respondents and users.
- **Analyze** – Viewing the raw results live, viewing Checkbox reports, and exporting to other formats.

An Overview of Management Tools available on Checkbox Application Toolbar

When you log in to the system, you will see the following options, depending on which version you are using.

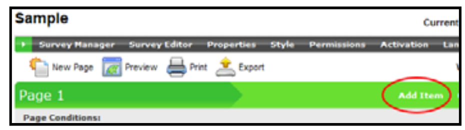
SURVEYS	**Survey Manager**	Allows you to create, edit, and save surveys – from an XML file, or from a blank survey.
STYLES	**Style Manager**	Lets you change the look and feel of your surveys. Change the background color; add a logo, header or footer, and more.
LIBRARIES	**Library Manager**	Allows you to save and borrow from surveys and questions that you use frequently.
REPORTS	**Report Manager**	Lets you view responses, create reports and filter results, and export data out of the system.
USERS	**User Manager**	Lets you manage user groups and email lists
INVITATIONS	**Invitation Manager**	Allows you to create email invitations to individuals and groups
SETTINGS	**Application Settings**	Allows you to make changes to how the survey platform works at an overall level. (System Administrator Only)
HELP	**Online Help**	Walks you through basic and advanced tasks.
LOGOUT	**Logout**	Logs you out of your current session.

You will use these options to create your first public survey.

Creating a Simple Survey with Checkbox

In this section, you will create a new survey, name it, and add some basic survey items.

1. Log in to Checkbox (http://survey.muohio.edu/checkbox/).
2. From the application toolbar, select the "**Surveys**" icon (SURVEYS) to open the **Survey Manager**.
3. Select the "**New Survey**" icon (New Survey).
4. Enter a name and description for your survey in the **Properties** area.
5. To customize your survey URL, enter a short name in the text field available in the **Custom Survey URL** area.
6. Click **"Submit".**
   - The first page of your survey opens. You can now access the options shown in the ***Sample*** at right.



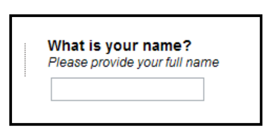
7. Click "**Add Item**".
   - The **Add Item to Survey** screen opens. You can view a list of **Question Items, Display Items, Report Items,** and **Action Items** from this screen.
   - Mouse over the "**Item Preview**" icon to examine each option.

Now we will create a survey question to collect a respondent's name.

1. Under **Question Items**, click on "**Open-Ended Single-Line Text**" and use the following fields to fill out the question:

Question Text / Subtext	**Options**	**Appearance**
- Question Text: What is your name? - Question Sub Text: Please provide your full name - Alias: leave default	- - Default Text: leave default - - Answer Format: None - - Max Length: 40 - Answer is required: Yes	- Width: leave default - Item Position: leave default - Label Position: leave default

2. Click "**Submit**". The item should look like the screen at right.
3. Add a few more **Question** and **Display** items by clicking "**Add Item**" again and choosing items from the lists.



Activating (Publishing) a Simple Survey

Testing the Survey

Before activating your survey, test its functionality and appearance.

1. Open your survey and click "**Test Survey**".

- A page containing a URL opens. Click this URL to preview your survey.
- You may also share this URL with other internal users (e.g. for proofreading.)

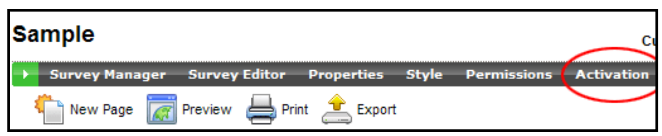
http://demo.checkbox.com/Samples/Survey.aspx?s=522example

2. Make any necessary changes to prepare the survey for activation.

Activating the Survey

Activating the survey will make your survey link accessible to your respondents.

1. Open the survey (if necessary) and click "**Activation**".



2. On the **Activation Status** page, choose a start and end date, and click "**Update Dates**" to apply the changes.

- If a confirmation screen appears, click "**OK**".

Inviting Respondents

Invite respondents in one of these ways:

- Send the survey URL in an e-mail:

  Example: http://demo.checkbox.com/Samples/Survey.aspx?s=522example

- Embed the URL in HTML on a web page:

  Example: Please Take Our Survey
  Embedded code: Please Take Our Survey

- Use the **Invitation Management** interface within Checkbox (not covered in this guide).

Analyzing a Simple Survey

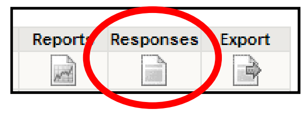
After you design a survey and send it out to respondents, you will want to be able see the results and to interpret the data.

There are three ways to view data:

- **View** the raw responses
- Create **reports** within Checkbox
- **Export** the data out of Checkbox and view data using a spreadsheet or other tools.

We will examine each option in this section.

Viewing Raw Responses



1. From the main toolbar, click the "**Reports**" icon ().
2. On the **Reporting** page, click the "**Responses**" icon ().
   - The responses page allows you to **view**:
     - o Response ID
     - o User Name
     - o Completion Timestamp
     - o IP Address of Respondent
     - o View

   - You can also **edit** the following:
     - o Edit Respondent Answers – "**Edit**" (**Note:** this option is only available to the survey owner.)
     - o Delete Selected Responses
     - o Delete All Responses

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

Creating Reports within Checkbox

1. From the main toolbar, click the "**Reports**" icon ().
2. On the **Reporting** page, click the "**Reports**" icon ().
3. Click the "**Report Wizard**" icon () which will create a report for you. A new report will appear.
4. To the right of the survey name, click the "**Run**" icon ().

**There are many other things you can do with reports that we will not cover here, but you can:*

- *Edit the report and then add additional items to it.*
- *Edit and autogenerate filters*
- *Run cross tab analysis*

See the online help for more details.

Analyzing a Simple Survey (continued)

Exporting Data out of Checkbox

1. From the main toolbar, click the "**Reports**" icon ( ).
2. On the **Reporting** page, click the "**Export**" icon ( ).
3. Choose options, adjusting the settings as needed:

Output Options	**CSV Options**	**SPSS Options**	**Output Encoding**
- CSV - SPSS	- Detailed Response Info - Detailed User Info - Merge Checkbox Results - Export Open-Ended Results - Export With Aliases - Export Hidden Items	- View SPSS Key	- ASCII - Unicode - UTF-8 - UTF-7

Some Things to Try

Adding a New Style to a Survey

Surveys can be stylized to maintain a standard look and feel. Many users add a graphic to the header (Company Logo) and some descriptive text in the footer. Survey templates can also be exported to serve as a style sheet for other surveys in or beyond your organization.

1. From the main toolbar, click the "**Styles**" icon ( ).
2. On the **Style Manager** page, click the "**New Style**" icon ( ).
3. Give the style a name and click "**Submit**".

- The **Header/Footer** page opens. You can type text or code in HTML.
- To upload an image, click "**Upload Image**" and browse to choose the image.
    - o Check the "**Add Image to Header**" option if you want to add the image to the top of all survey pages.
    - o Check the "**Add Image to Footer**" option if you want to add the image to the top of all survey pages.
- Return to the **Style Manager** page to export or copy a template to serve as a style sheet for other surveys.

Available style modifications:

Base Styles	**Item Styles**	**Additional Styles** (Optional)
- Base Font Type, Size, Color, - Title Font, Page Number, Error Message styles - Background of Page, Background Image	- Question/Subtext/Answer Font Type / Size / Color - Background Colors - Matrix Styles (Header/Subheading, Rows, Fonts, Borders) - Matrix Font Type / Size / Color - Matrix Border Width and Color	- Progress Bar Color, Size, Alignment - Button Styles – Font Type, Color, Size - Item Spacing

Some Things to Try (continued)

Creating a Chart Style

Chart styles can be created, saved and applied to all charts in a report to provide a more uniform appearance.

1. From the main toolbar, click the "**Styles**" icon (

).

2. On the **Style Manager** page, click the "**Chart Styles**" option and then click the "**New Style**" icon (

).

3. Give the style a name and select "**Public**" if you wish to allow others to use your style.

4. Select "**Editable by other users**" only if you want to allow others to edit the style.

5. Select from the available settings within the **Chart Settings** area

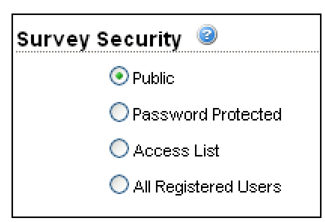
   Available chart setting modifications:
   - **General Settings** – chart type, width, height, background color, and item position
   - **Text** – text font, title font size, legend font size, label font size, and text color
   - **Border** – border frame style, line style, line width, frame background color, and line color
   - **Bar/Line/Column Graph Options** – bar/line color and bar/column style
   - **Pie/Doughnut Chart Options** – color palette and doughnut radius
   - **Other Options** – show percentages, hatching style, hatching background color, show in 3D, x angle, y angle and perspective

6. Click "**OK**".

Applying Survey Security

Checkbox offers the ability to secure access to the surveys you are creating. Surveys may be either public or private (restricted in some way). By default, all surveys are public.

To change these options you must first select a survey. From the first page, click "**Permissions**" and choose the desired level of security:



- **Public** – any respondent who can access the link will be able to take surveys.
- **Password Protected** – respondents must supply a password before taking surveys.
- **Access List** – respondents must be on a one-time list (CSV file) of e-mail addresses in order to take surveys.
- **All Registered Users** – only users that have been imported into the system can take surveys.

Resources for information and assistance

Visit the following Web sites for more information about using Prezza Checkbox Web.

- Prezza Technologies Web site at http://www.prezzatech.com for:
  - Complete User Manual
  - Demonstrations
  - Prezza's Knowledge Base
  - Discussion Forums
  - FAQs
- Survey Tools Web site at http://survey.muohio.edu.

- MU Knowledge Base at http://ithelp.muohio.edu and search on '**survey tools**'.

If you need assistance, please contact the IT Services Support Desk at 513-529-7900 or supportdesk@muohio.edu.