Checkbox®

Upgrade Guide

Upgrade Guide for IIS7/Windows 2008/2008R2	
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1   Introduction

Checkbox 6 is a major update to the Checkbox® user interface. Checkbox 6 makes heavy use of Cascading Style Sheets (CSS), AJAX, and JavaScript and therefore requires modern browsers and recent versions of IIS to function properly.
Please review all prerequisites and installation steps prior to starting
If you have questions or feedback about the installation process, please contact our support department:

- ➢   **http://www.checkbox.com/support/login**

1.1.1   System Requirements

Component	Minimum Requirements
Operating System	32 and 64 bit versions of Windows 2008, and Windows 2012
Web Server	Microsoft Internet Information Server (IIS) 7.0 or higher with AT LEAST 4 GB RAM. *
Database	Microsoft SQL Server 2008, 2012. SQL Server Express Editions also supported. **
Browser	Microsoft Internet Explorer 9.0 or higher; Google Chrome; Firefox; Safari
Privileges	Administrator access to Web Server and Database Server required for installation.
Disk Space	Web : 75 MB Database : Scales depending on application usage.
ASP.NET	.NET 4.5

   * * Larger scale deployments, such as those with large respondent pools or many administrative users, will likely require more RAM.
   ** For optimal performance, the database server software should not be hosted on the same physical machine as the web server

1.1.2   Web Farms

Support for installation in a web farm or web garden environment is currently available with an Enterprise License. For more information view the Web Farm Setup Guide.

1.1.3   64-Bit Support

Checkbox 6 supports running directly on both 32-bit and 64-bit versions of Windows. If you plan to use Native SPSS data export format, please note the special instructions in Step 6.

2   Before You Begin

Prior to commencing the installation, please ensure that your system meets all software requirements, you have sufficient access to the web and/or database server, and that you have all necessary information.

The Checkbox 6 Upgrade makes a number data and schema changes to the Checkbox database. Please be sure to create a backup of your Checkbox database before upgrading. It is also recommended that you test the upgrade process on a staging server and with a backup of your existing Checkbox database. This will allow you to sort out any data or configuration issues before deploying the upgrade to your production environment.

2.1.1   Important Changes in Checkbox 6;

A few features have been removed from Checkbox® for this release. In all cases, these features were removed because their use or functionality was limited or they were made obsolete by changes in the application.

Removed Features

Feature	Description
Page Layout Templates	Nearly all customers used page layout templates to either center the survey content in the browser window or to arrange questions in multiple columns. Checkbox® now supports centered content by default and we plan to add more options for survey layouts in a future release.
Chart Styles	Chart styles were of limited use because they did not work like survey styles.

2.1.2   Software Requirements:

Ensure ASP.NET version 4.5 is installed on the web server.

2.1.3   Access to Servers:

Server	Required Access
Web Server	• Copy/Move Files • Modify File Permissions • Use IIS Manager to configure web sites and virtual directories.
Database Server	• Create databases • Manage database server security settings

2.1.4   Collect Information:

You will be asked for the following information during the installation process. Please gather this information and have it

handy before running the web-based installation in *Step 8*.

- Name or IP address of database server
- SQL login information your existing Checkbox® installation uses to access the database server

If you do not have the information available, you should be able to find it in the *DefaultConnectionString* value in your existing Checkbox installation's *web.config*.

3   Instructions

3.1   Download Files

Download the Checkbox 6 .zip file and license file from the customer area of the Checkbox web site.

3.2   Extract and Deploy Application Files

A.) Copy all files in the Checkbox 6 .zip archive to the desired location on your web server*. In most cases you will simply delete your existing installation files and replace them with new Checkbox 6.x files. If you wish to make a new website/application then you may want to place your installation files in a new location to preserve your existing website.

*Since Checkbox 6 uses ASP.NET 4.5, the application files should not be placed in a folder that contains ASP.NET 1.x, 2.x application or an existing Checkbox 4.7 Installation.

B.) Copy the license file to the /bin folder of the Checkbox installation

3.3   Create an Application Pool

Use the IIS Administration console to create a separate application pool to run Checkbox® 6. Configure the application pool to use ASP.NET 4.0 and (in IIS7) *Integrated* pipeline mode.
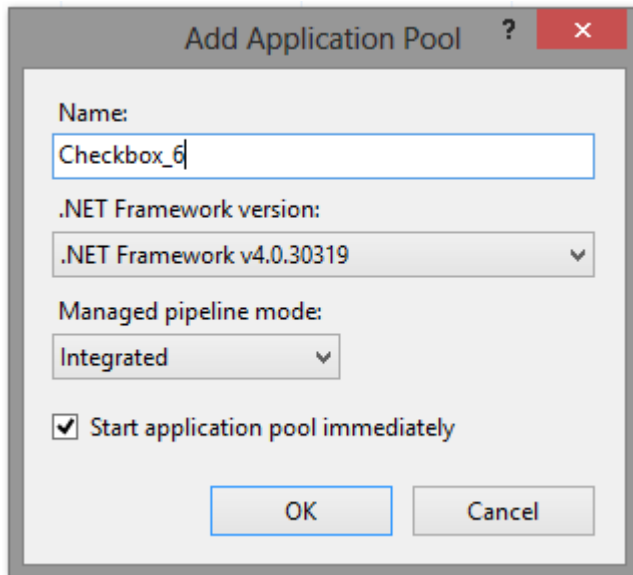
3.4   Create Virtual Directory/Application

[Skip if you are using the same website as your previously installation]

When Checkbox is not installed as a standalone web site, it is necessary to create an Application for the Checkbox folder. To do so, open IIS Manager and right-click on the folder containing your Checkbox® files and:
- (IIS 6) Open folder properties and click the *Create* button in the *Application Settings* section of the properties dialog. Be sure to assign this application to the application pool created in *Step 2*.
- (IIS 7) Right click on the folder and click on *Convert to Application*. In the dialog that appears, be sure to assign the application to the application pool created in *Step 2*.

3.5   Create Temp Folder for Data Export

Inside the folder containing the Checkbox application files, create a folder named */Temp* that will be used to store the temporary files created in the upload and import processes of Checkbox. Ensure that the user context for the Checkbox application pool has full control over this folder. (If you are not sure about which context to use, the *Users – IIS_IUSRS* group should work for most situations. More information available in Step 7)

Checkbox® will use this folder to create temporary files for all response exports to speed up the export process for surveys with many questions or responses

3.6   Copy SPSS Files (64-bit Server Only)

Checkbox supports response data export in native SPSS (.sav) file format.   If you plan to use this feature and your server runs a 64-bit version of Windows, extract all of the files from *Install/SPSS/CheckboxSPSS_x64.zip*. If your server runs a 32-bit version of Windows extract all of the files from *Install/SPSS/CheckboxSPSS_x32.zip* and copy them to the */bin* folder of the Checkbox installation. If prompted, choose to overwrite files.

You may need to repeat this step in the future when you patch to newer versions of Checkbox

3.7   Configure File & Folder Permissions

To run the upgrade, Checkbox needs write access to the ***web.config*** file and read access to **all other installation files**.

All Files: Ensure that all files have proper read permission for your website to run. By default the user group *IIS_IUSRS* account should provide the necessary read access. If you have configured your Application Pool to use a unique identity make sure that you configure files have read access for that identity/account.
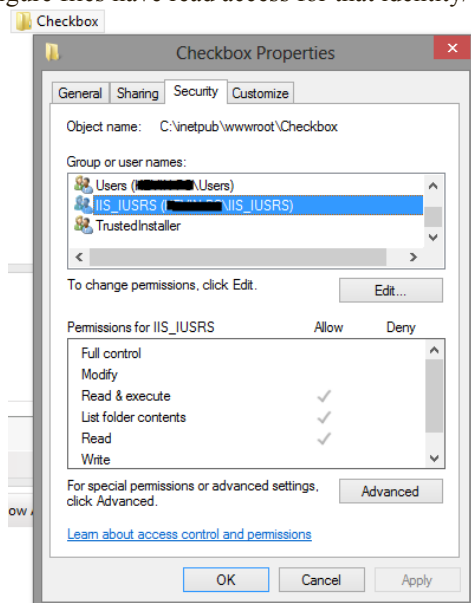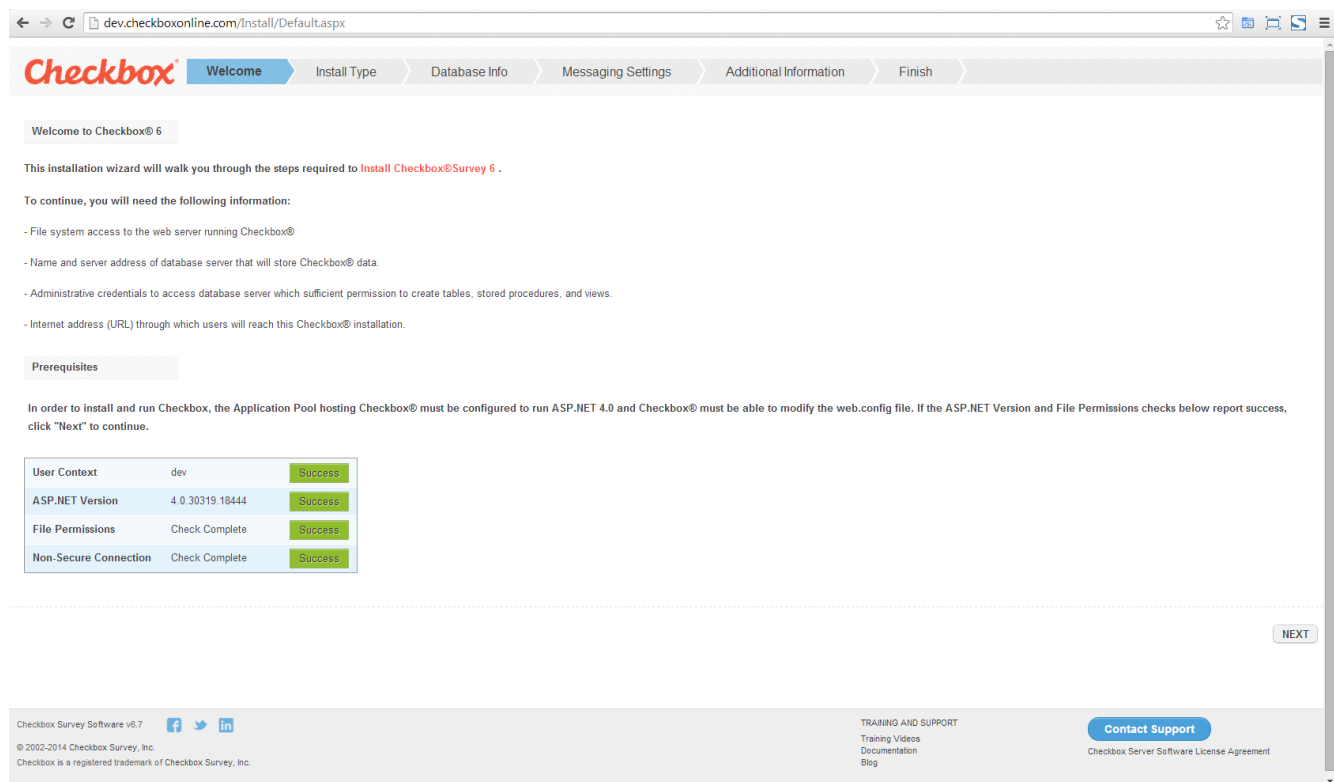
Web.config: Ensure that this file does not have the *Read Only* flag set and that the user context the Checkbox® application pool is configured to run under has *Modify* access to the file. If you are unable to identify the user context, you can grant the *Users/Everyone* group *Modify* access to the file. Once installation is complete, you can change the access to *Read*.
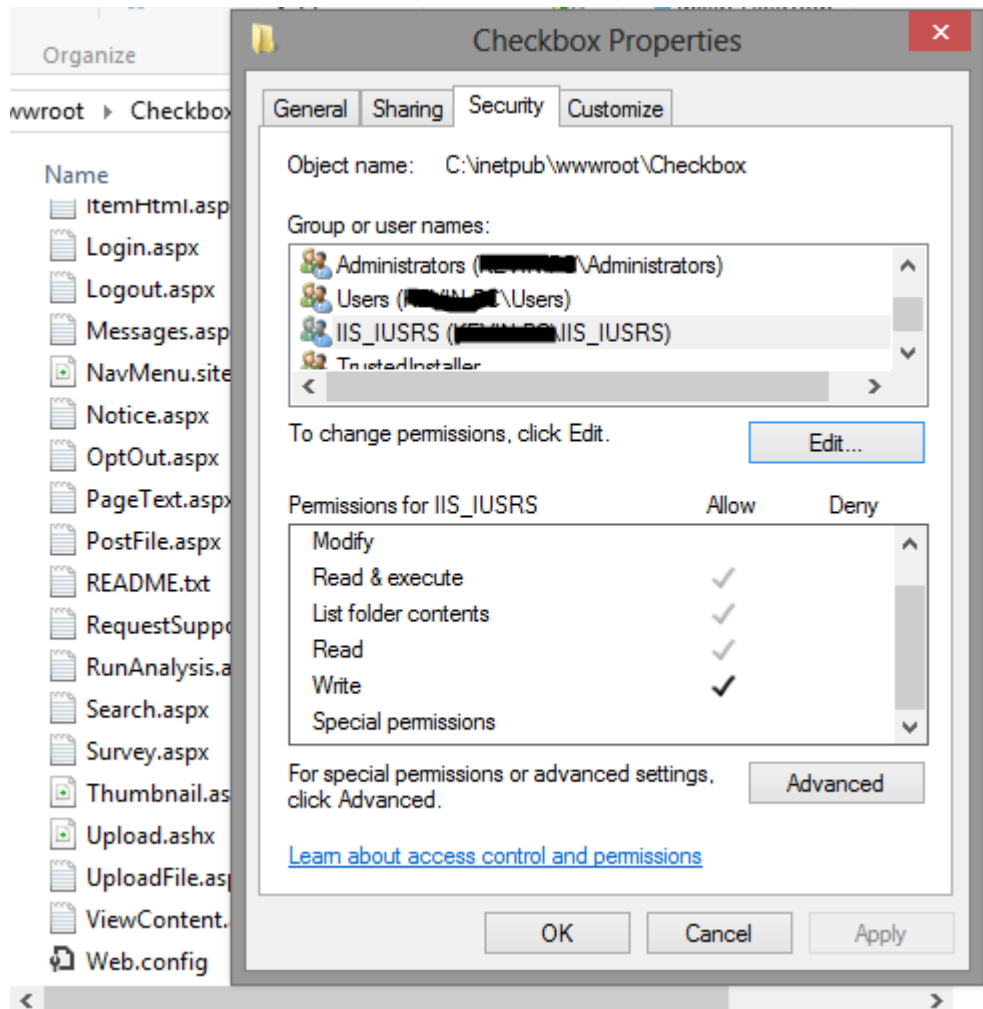
3.8   Run the Web-Based Install

3.8.1   Navigate to the Install Start Page

In a web browser, navigate to **http://localhost/Checkbox/Install/Default.aspx**. You should see a screen that looks like the following: *(Your exact URL could be different!)*

Please Note: If your previous site is SSL enabled you will need to run the upgrade process using http:// and re-enable SSL once completed. If you attempt to run the upgrade process using SSL you will get a 200 Syntax error. SSL instructions are available in the Appendix.
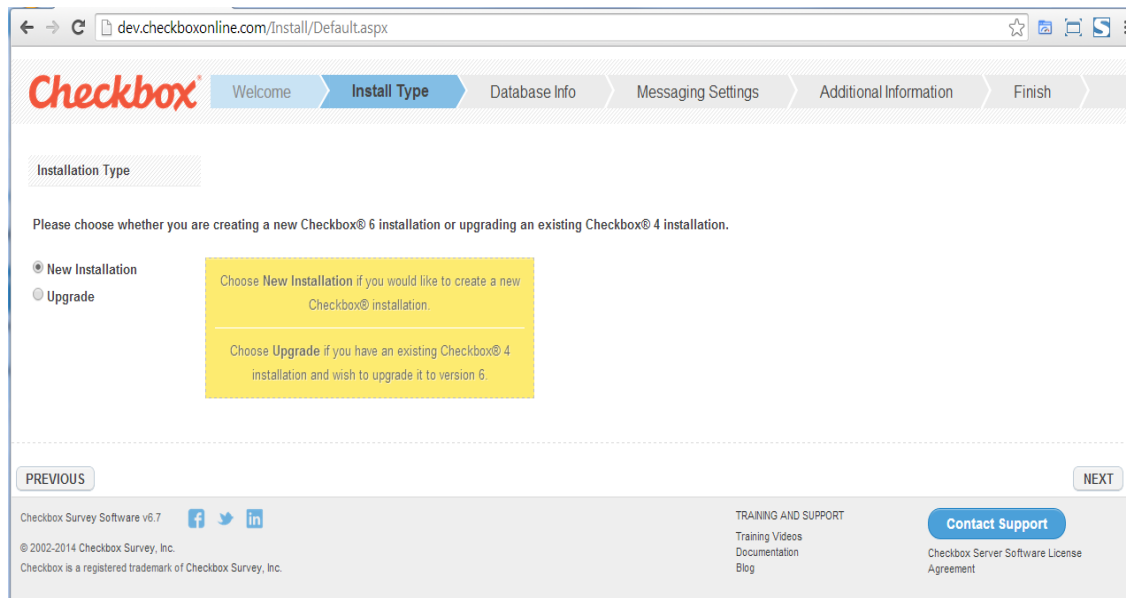
If you do not see this screen, you may have connected to the wrong URL or ASP.NET may not be properly configured on the web server. The most common issue is that the URL is wrong. The provided URL is correct because of how we set up our virtual directory under our default website. If you are installing the application in a uniquely named virtual directory or website your URL will be different.

One way to confirm that you are navigating to the proper location is as follows:

1. *Open IIS and expand the recently created Virtual Directory (Checkbox)*
2. *Select Browse*

3.8.2   Select Installation Type

Click the *Next* button to go to the Installation Type page. Ensure that the "Upgrade" option is selected:

3.8.3   Enter Database Info

Click the *Next* button to go the Database Info page. Enter connection information and user credentials here to allow Checkbox® Survey to connect to its database to install the required database objects.
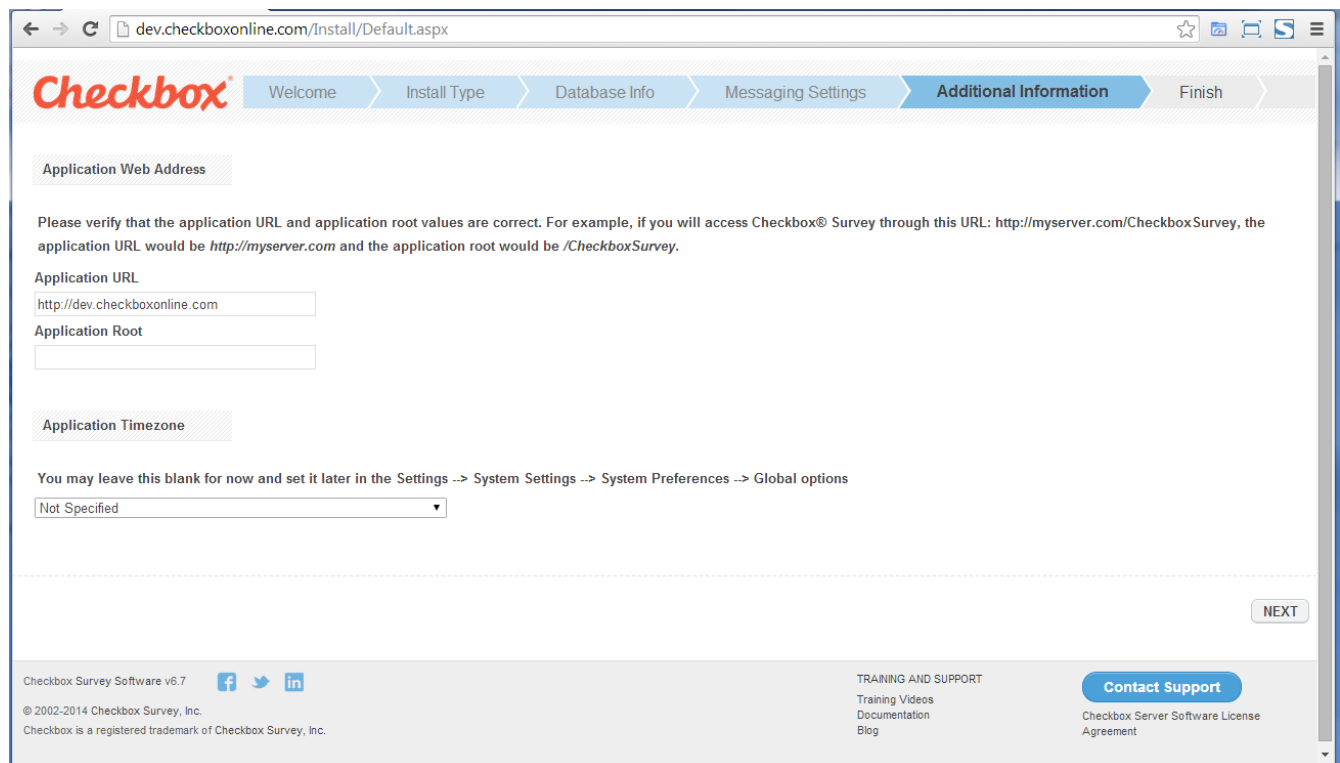
3.8.4 Configure Messaging Settings

Determine how you want configure e-mail messages. Choose from:
1. Set up e-mail system later on the Settings -> Email tab
2. Send e-mail messages via SMTP Server
3. Send e-mail messages via Checkbox Messaging Service

Please refer to the Invitation Scheduler setup guide (MessagingService.pdf) located in your documentation folder for more information.

3.8.5 Verify Information

Verify that values shown for **Application URL** and **Root** are correct. In most cases, the values automatically inserted into these fields will be correct. These values are used by the application for opening new windows, sending email invitations, linking to images and CSS style sheets, etc. If the application will be available to users on the Internet or on a corporate network, ensure the *Application URL* is one that can be accessed by all users (e.g. *http://localhost* is rarely the correct URL). **For most Websites the Root will be empty.**

3.8.6   Start the Upgrade

Click Finish to commence the installation. When the installation is complete, you will automatically be redirected to the Checkbox® login page.
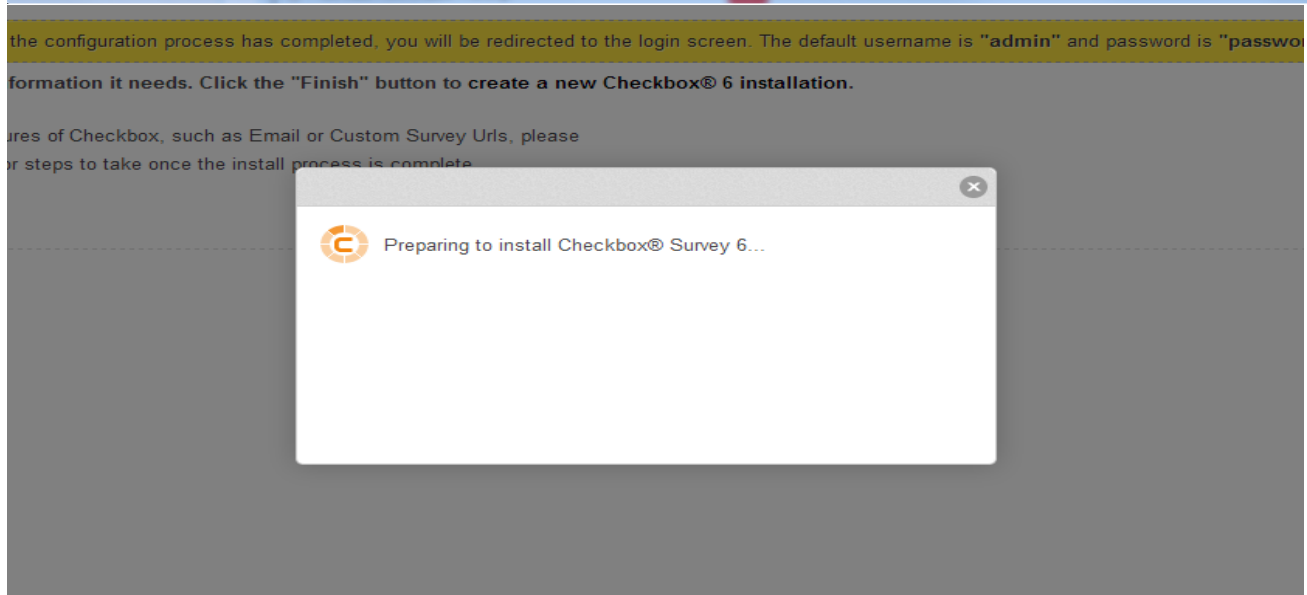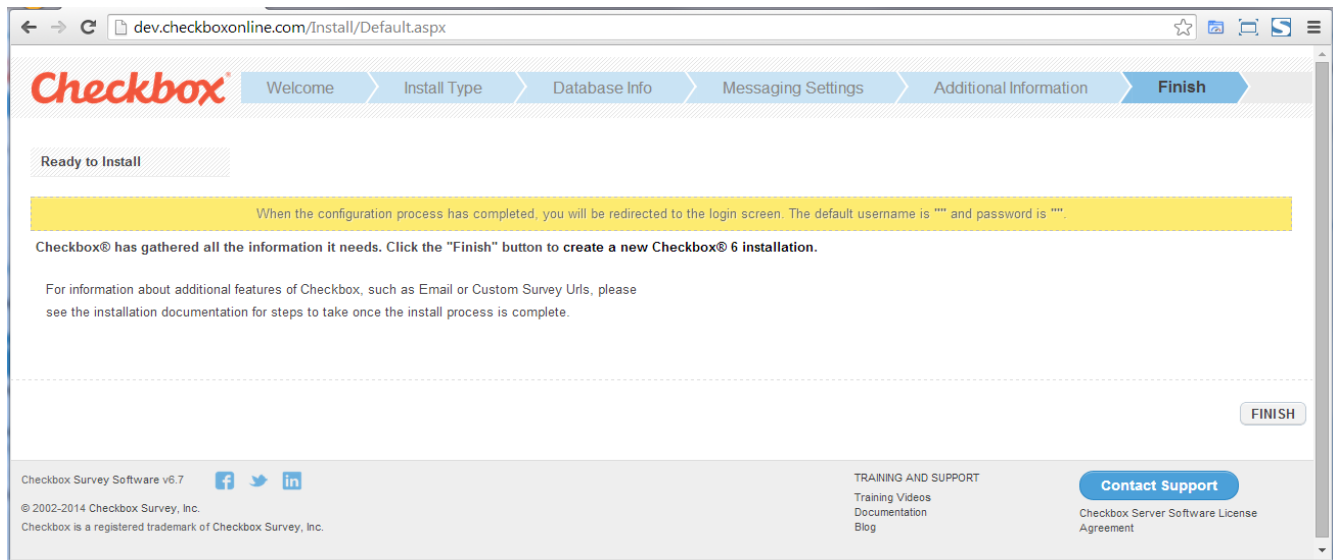
Checkbox®

Checkbox®

Username

Password

Login

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4 Post Install Actions (Optional)

At this point, the install is now complete and you may start using Checkbox®. The following steps detail how to enable optional features. If you wish to enable advanced features such as SSL or Active Directory please view the appropriate documentation located in the documentation folder.

4.1 Enable Custom URLs

In Checkbox, a survey URL typically has the form:

> **http://myserver.mycompany.com/Checkbox/Survey.aspx?s=612666ab9f95416cb447c738c46c04ba.**

Though the feature is turned off by default, Checkbox allows survey editors to specify more user-friendly URLs for surveys, such as:

> **http://myserver.mycompany.com/Checkbox/y2k.survey**

Log in to Checkbox using an account in the *System Administrator* role and navigate to *Settings -> Survey Settings -> Survey Preferences*. Check the box to *Enable Custom Survey URLs* and then click the *Save* button at the bottom of the page to save the change.

IF YOU WOULD LIKE TO ENABLE SSL PLEASE SEE THE APPROPRIATE DOCUMENTATION FILE LOCATED IN THE DOCUMENTATION FOLDER OF YOUR CHECKBOX DOWNLOAD