



## Server – Installation Guide

---

Checkbox Survey Installation Guide	
<b>Owner</b>	Checkbox Survey, Inc.
<b>Author</b>	Checkbox Support
<b>Publish Date</b>	01.01.2015
<b>Version</b>	Checkbox Year 2015

# 1 Introduction

The purpose of this document is to guide you through a fresh installation of Checkbox Survey. If you are updating your application from a previous version you will need to follow a different guide.

If you are updating from any version of Checkbox 5 or 6, you will want to follow the patch guide

If you are updating from Checkbox 4.7, you will want to follow the upgrade guide

To ensure that your installation of Checkbox goes smoothly, we strongly suggest that you read through the entire installation guide before attempting to follow its instructions. You should make sure that your server meets our minimum system requirements, and that you are going to be using a browser that is modern, and supported by the application. If you encounter any issues with the installation you can submit a support ticket by logging in at <http://www.checkbox.com/login> and one of our helpful support representatives will be happy to assist you.

If you are installing this as a trial or do not have access to support, please contact your sales representative and they will assist you in gaining access to support.

For user guides, training videos, or product information please feel free to check out the following links.

User Guides: <http://www.checkbox.com/support/documentation/>

Training Videos: <http://www.checkbox.com/support/training-videos/>

Product Information: <http://www.checkbox.com/server-edition/>

If the links above do not work, then this guide or the version that you are on may be outdated.

## 2 System Requirements

Checkbox Survey is a modern web application, which utilizes the .NET framework, Ajax, JQuery, and Microsoft SQL Server to deliver a highly scalable, and functional survey application. Due to this your system will need to meet the following system requirements in order to run the application correctly. If you have any questions or issues with the requirements please contact support and we will do our best to answer your questions.

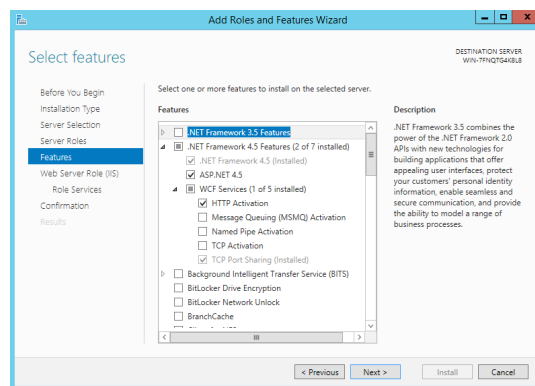
Component	Minimum Requirements
<b>Operating System</b>	32 and 64 bit versions of Windows 2008, and Windows 2012
<b>Web Server</b>	Microsoft Internet Information Server (IIS) 7.0 or higher
<b>Memory</b>	4GB RAM *
<b>Database</b>	Microsoft SQL Server 2008, 2012, 2014. SQL Server Express Editions also supported. **
<b>Browser</b>	Internet Explorer 9.0 or higher; most recent versions*** Chrome; Firefox; Safari
<b>Privileges</b>	Administrator access to Web Server and Database Server required for installation.
<b>Disk Space</b>	Web : 75MB Database : Scales based on usage of application
<b>ASP.NET</b>	.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

\*\*\* For Chrome and Firefox, the most recent ESR releases are also supported

If you are using Windows Server 2012, ensure that you have WCF services enabled on your server. In previous versions of Windows Server this is enabled by default, Windows Server 2012 has this disabled by default.



## 2.1 Web Farms

Support for web farm and load balanced environments is currently only available with an Enterprise license of Checkbox. If you have an Enterprise license please review the Web Farm Setup guide. If you do not have an Enterprise license and would like more information on this, please contact your sales representative for more information.

## 2.2 Architecture Support

Checkbox 6 supports running on both x86 and x64 versions of Windows, for high traffic applications however, you will want to install Checkbox on a x64 server to take advantage of additional RAM.

# 3 Installation Files

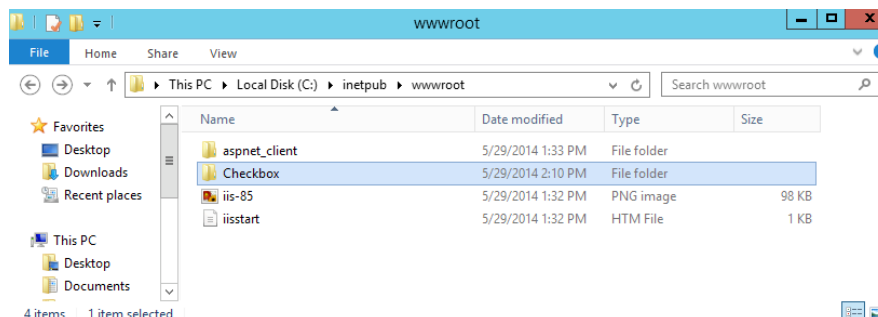
## 3.1 Download Files

If you are using a trial version of Checkbox you should have received a link to download the application files in your email, the files you download will already contain your license file. If you have purchased the Checkbox application you can download the most recently released version of Checkbox Survey from our customer support area. Your application files, and license file, can both be seen on the right hand side when logged into support.

## 3.2 Extract and Deploy

Copy all of the files in the Checkbox 6 zip archive to the desired location on your web server. The default location for web sites on Windows Server is the c:\inetpub\wwwroot folder, so this is where we will extract them in the screen shots below. You can however extract them wherever you like as long as you grant proper permissions.

You will want to place the license file that you downloaded into the Checkbox\bin folder.

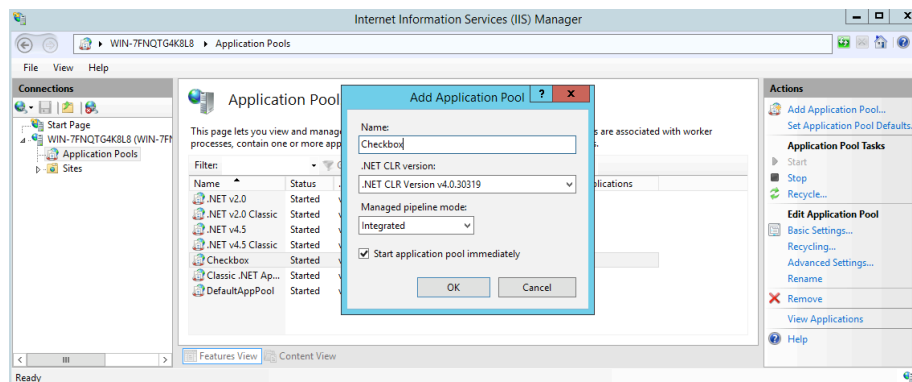


## 4 Configure Internet Information Services (IIS)

### 4.1 Create an Application Pool

Checkbox Survey requires .NET 4.5, which is an in place update to .NET 4.0. This means that you will want to create a .NET 4.0 application pool for Checkbox. You can do this by doing the following:

1. Open IIS Manager
2. Expand the Server Node
3. Right click on "Application Pools"
4. Select "Add Application Pool"
5. Give your application pool a name
6. Select ".NET 4.0" or ".NET CLR Version 4.0"
7. Select "Integrated" as the Managed Pipeline Mode
8. Check the box to start the pool immediately
9. Click "OK"

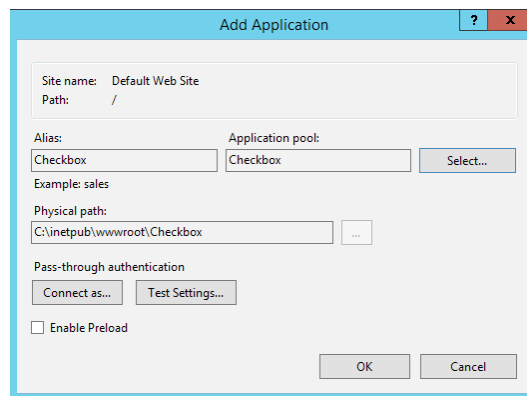
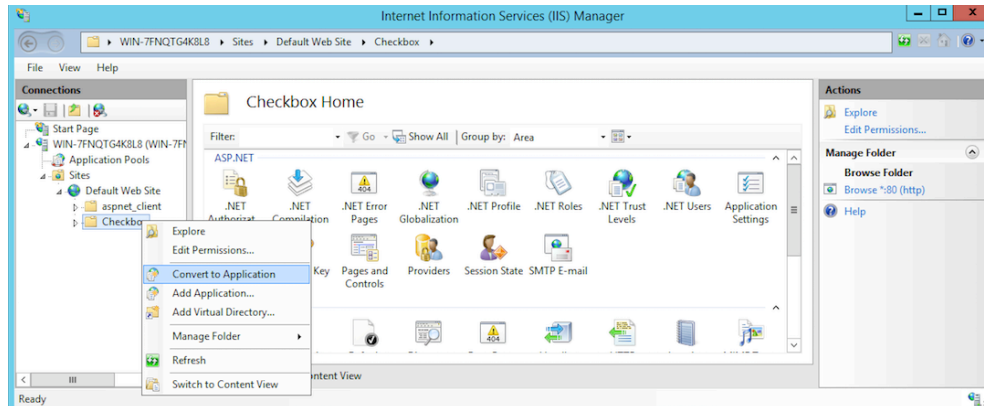


### 4.2 Create Virtual Directory / Application

For this example, we are installing Checkbox in a virtual directory on the web server. This means that our application will be available at <http://localhost/checkbox> instead of just <http://localhost>. For this to work we will need to convert the folder that we extracted earlier to an application, and then assign our application pool that we just created to it.

To do this you will need to do the following:

1. Expand "Default Web Site"
2. Right click on "Checkbox"
3. Click "Convert to application"
4. Change the application pool to the one we created earlier
5. Click "OK"



## 5 Create a TEMP folder

You will need to create a TEMP folder inside of the folder containing the Checkbox files. This TEMP folder allows you to upload and download files from the Checkbox Application. When you create this folder you will need to ensure that the Identity that is running the application pool has access to this folder. By default this user is "IIS\_IUSRS".

## 6 Copy SPSS Files

Checkbox supports response data export in native SPSS (.sav) file format. If you plan to use this feature you will need to deploy the necessary files to your server. These files can be retrieved from the Install/SPSS folder. You will want to navigate to this folder and open extract the zip file that matches your systems architecture.

For example, if your system is 32-bit you will want to extract the files in the *Install/SPSS/CheckboxSPSS\_x32.zip* folder. If your system is 64-bit you will want to extract the files in the *Install/SPSS/CheckboxSPSS\_x64.zip* folder. You will want to extract these files into the /bin folder of Checkbox. When prompted you should overwrite all files with the same name.

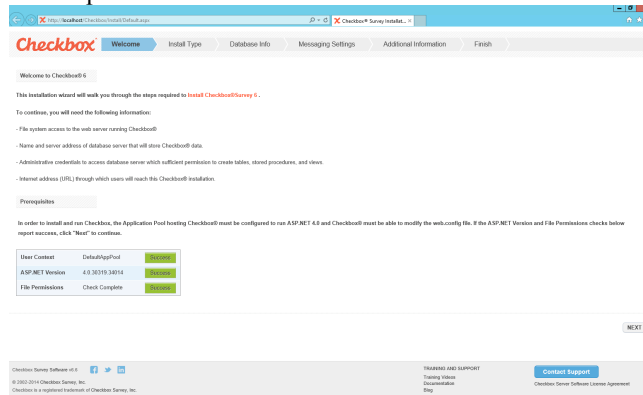
## 7 Create the Checkbox Database

Checkbox requires a SQL Server database in order to store all of the data for your application. We strongly recommend for performance reasons that you have SQL Server on a separate server then your application. You will want to create a new database for Checkbox by connecting to your database server using SQL Management Studio or a similar tool. The default settings for the database are sufficient.

## 8 Run the Web-Based Install

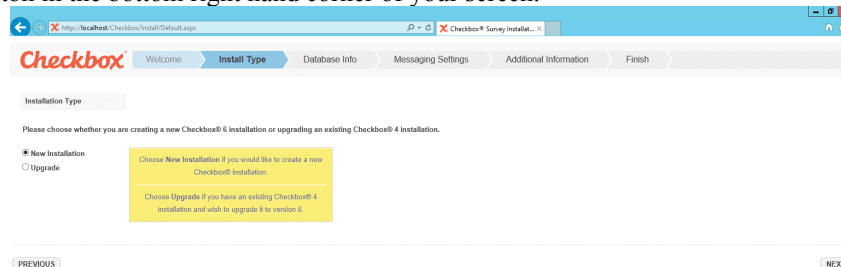
### 8.1 Navigate to the Install Start Page

If you followed all the instructions above this should be at <http://localhost/checkbox/install/default.aspx>. You should see a page that looks like the following; if your page looks different you should ensure that all file permissions are correct. If you are sure that they are please submit a screen shot of your issue to our support team and they will assist you on how to proceed.



### 8.2 Select Installation Type

Since you are installing a fresh version of Checkbox you will want to select “New Installation” and then click the “NEXT” button in the bottom right hand corner of your screen.



## 8.3 Enter Database Information

Using the inputs provided, enter the database connection information for the database that you created in Step 7 and then click the “NEXT” button. Checkbox will attempt to verify the provided information. If you are using SQL Authentication be sure that your SQL Server instance is set up to allow this.

The screenshot shows the 'Database Info' step of the Checkbox Survey installation wizard. The browser address bar shows 'http://localhost/Checkbox/Install/Default.aspx'. The wizard has a progress bar with steps: Welcome, Install Type, Database Info (current), Messaging Settings, Additional Information, and Finish. Below the progress bar, there is a 'Database Connection' section with a warning: 'This connection information is used by Checkbox® Survey to connect to its database to install the required database objects. The database must exist and be reachable from the web server running Checkbox® Survey. The user credentials supplied must have permission to create tables, views, stored procedures, and users. These user credentials will then be stored by Checkbox® and used during normal operation of the application.' On the left, there are three radio buttons for authentication: 'SQL Server Authentication' (selected), 'Windows Authentication', and 'Freeform Connection String'. To the right, there are input fields for 'Database Server' (WIN-7FNQTG4K8L8\SQLEXPRESS), 'Database Name' (Checkbox), 'Username' (sa), and 'Password' (masked with asterisks). At the bottom, there are 'PREVIOUS' and 'NEXT' buttons.

## 8.4 Configure Email Settings

You can send emails from Checkbox using your own SMTP server directly, or by having invitations pass through a windows service that you can install on your web server called the “Checkbox Messaging Service”. This service requires additional RAM and CPU power. For now we are going to skip setting up email, if you want to set up email you can always do this later in the system settings.

The screenshot shows the 'Messaging Settings' step of the Checkbox Survey installation wizard. The browser address bar shows 'http://localhost/Checkbox/Install/Default.aspx'. The wizard has a progress bar with steps: Welcome, Install Type, Database Info, Messaging Settings (current), Additional Information, and Finish. Below the progress bar, there are three radio buttons for email settings: 'Set up e-mail system later on the Settings -> Email tab' (selected), 'Send e-mail messages via SMTP Server', and 'Send e-mail messages via Checkbox Messaging Service'. At the bottom right, there is a 'NEXT' button.

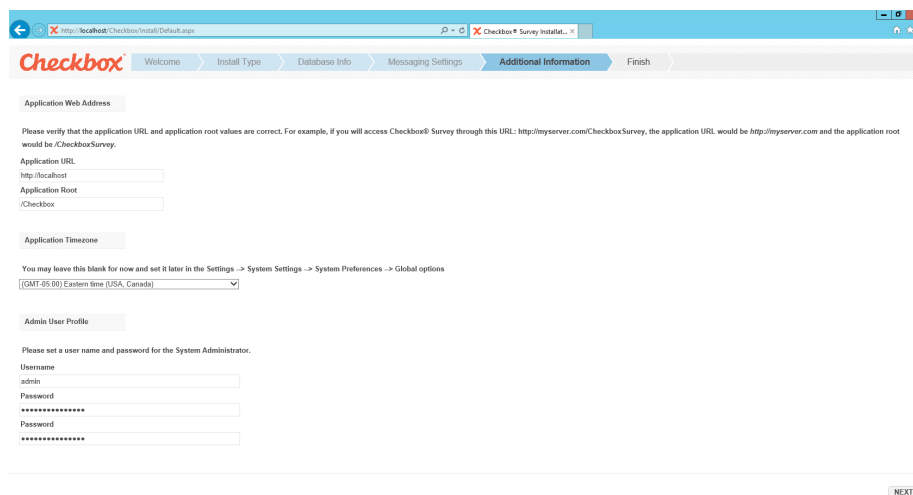


## 8.5 Additional Information

Verify that the values shown for Application URL and ROOT are correct. In most cases, the values automatically inserted into these fields will be correct and should not be altered. These values are used by the application for opening new windows, sending invitations, linking to images, files 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.

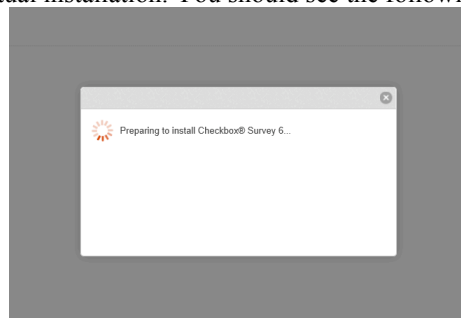
If you wish to select the time zone of your application you can do so on this screen as well. You can change this at any time by going to the System Settings -> System Preferences.

This screen will also allow you to create your first Checkbox user, and give them a username and password. This information will be required to log into Checkbox the first time.



## 8.6 Start the Install

Click “FINISH” to start the actual installation. You should see the following screen:



*\*Note if you get a 404 error; please see the note above about WCF services.*

## 8.7 Log Into Checkbox

When the installation is done you should be redirected to the login page. You will need to log into the application using the username and password that you chose in step 8.5



## 9 Post Installation Actions

The following setup actions are optional and not required for the core functionality of the application.

### 9.1 Enable Email

Email related features, such as Invitations, Email Response / Alert items, and password reset capability will not be available until email has been configured for the application. You can configure email by going to the System Settings (orange cog wheel in upper right hand corner) and selecting System Settings -> Email. To enable email, check the box next to "Enable Email Functionality". When email is enabled additional configuration options will appear.

If you wish to use the Checkbox Messaging Service, please make sure that you follow the instructions in the Messaging Service guide.

## 9.2 Enable Custom Survey URLs

In Checkbox the typical survey URL has the form:

<http://dev.checkbox.com/survey.aspx?s=5a23sk32fja893jaf3ojas3f0>

You can however get your URLs to look like this:

<http://dev.checkbox.com/marketing.survey>

To enable this feature go to the System Settings (orange cog wheel in the top right hand corner) and select Survey Settings then Survey Preferences. Click on the checkbox next to “Enable Custom Survey URLs” and then click save. You will then have the option to create custom survey URLs for your surveys when editing them.

## 9.3 SSL

If you would like to set up the Checkbox application to allow for secured connections you will need to follow the SSL Documentation guide. If you attempt to access the application using HTTPS before following this guide you will end up with “infinite loading” icons any time the application attempts to load data.