

EPI INFO WEB SURVEY SYSTEM SURVEY MANAGER ADMIN CLIENT HELP

Version 1.3
07/23/2019

VERSION HISTORY

| Version # | Implemented By | Revision Date | Reason |
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| 1.0 | Ninad Date; Sachin Agnihotri | 09/19/2012 | Version 1.0 of the document |
| 1.1 | Sachin Agnihotri | 04/10/2013 | Edit for clearance |
| 1.2 | Sachin Agnihotri | 09/21/2016 | Security configuration section removed |
| 1.3 | David Nitschke | 07/23/2019 | Edits for clearance and 508 accessibility |

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1 INTRODUCTION

1.1 Purpose

Epi Info™ Web Survey (EIWS) is a system used to publish surveys to the web. Surveys published to the web are first created in the Epi Info™ 7 Form Designer tool or in an Excel spreadsheet as a "data dictionary".

The EIWS Survey Manager Admin Client is a desktop tool to manage EIWS Organizations or teams. The purpose of this document is to provide an overview of key functions and features of the Survey Manager Admin Client. Use the information in this document to create Organization accounts that are required to publish surveys. This document should be used with the *Epi Info Web Survey Integrated Deployment* document.

1.2 Audience

The audience for this document is an Information Technology (IT) Administrator, a Web Application Administrator, or the person responsible for managing the EIWS system.

2 INSTALLATION

Install the Survey Manager Admin Client in order to complete the configuration of EIWS on the web server and create the initial Organization. The Survey Manager Admin Client installer program is included in the installation package in the folder named *SurveyManagerAdminClient*.

2.1 Installing the Survey Manager Admin Client

Follow the steps below to install the Survey Manger Admin Client.

1. From the *EIWSIntegrated* folder, copy the folder named *SurveyManagerAdminClient* to the computer that will be used as the web server or another local computer. See the note above when considering which computer to use.
2. Open the *SurveyManagerAdminClient* folder and run the *Setup.exe* file. This installs the Survey Manager Admin Client.
3. The Survey Manager Admin Client runs immediately after the install operation is finished.

3 USING THE SURVEY MANAGER ADMIN CLIENT

3.1 Starting the Survey Manager Admin Client

If installing the the Survey Manager Admin Client, the tool starts automatically, so if the tool is already running, you can skip this step. After installation, to start the client, run the file "*Epi.Web.SurveyManager.Client.application*". To do this, open the folder named *SurveyManagerAdminClient*. Double-click the *Epi.Web.SurveyManager.Client.application* file, or right-click it and select "Open".

3.2 Adding a Shortcut (Optional)

You will need to run this Survey Manager Admin Client each time you need to create an Organization account. To facilitate this, you may want to add a shortcut to the "*Epi.Web.SurveyManager.Client.application*" on your desktop, pin it to your taskbar, or pin it to the Start Menu for your convenience.

4 SETTING UP THE MANAGER SERVICE

The Manager Service is a piece of software running on the web server. In order for the Survey Manager Admin Client to communicate with the Manager Service, you need to set the Manager Service URL in the Local Settings section of the Survey Manager Admin Client. Your web administrator or the person who configured the service on the web server will need to provide the following information for the URL and settings.

- Manager Service URL
- Does the Manager Service use Windows Authentication?
- If not, then is the Binding Protocol basic or wsHTTP?

4.1 Setting the Manager Service URL

1. Start the Survey Manager Admin Client.
2. Click the "View Config" button in the top right corner.

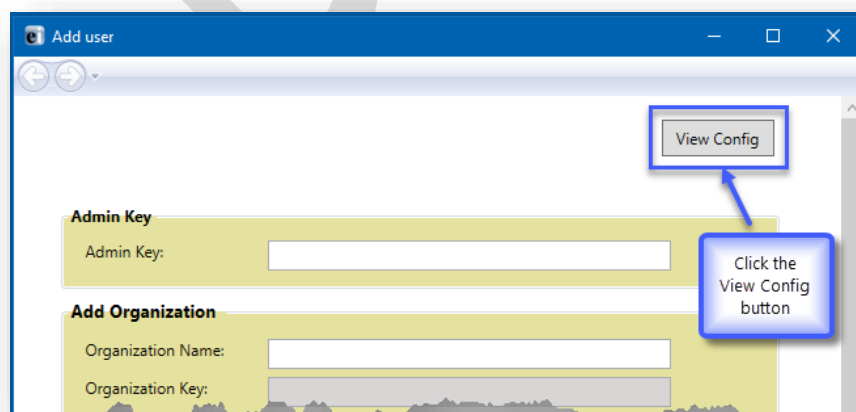


Figure 1: "Add user" screen showing the "View Config" button.

3. Locate the Manager Service URL field on the Local Settings screen. Initially, the Manager Service URL field will have a placeholder URL such as `http://SERVER_NAME/APPLICATION_NAME/SurveyManagerServiceV3.svc`

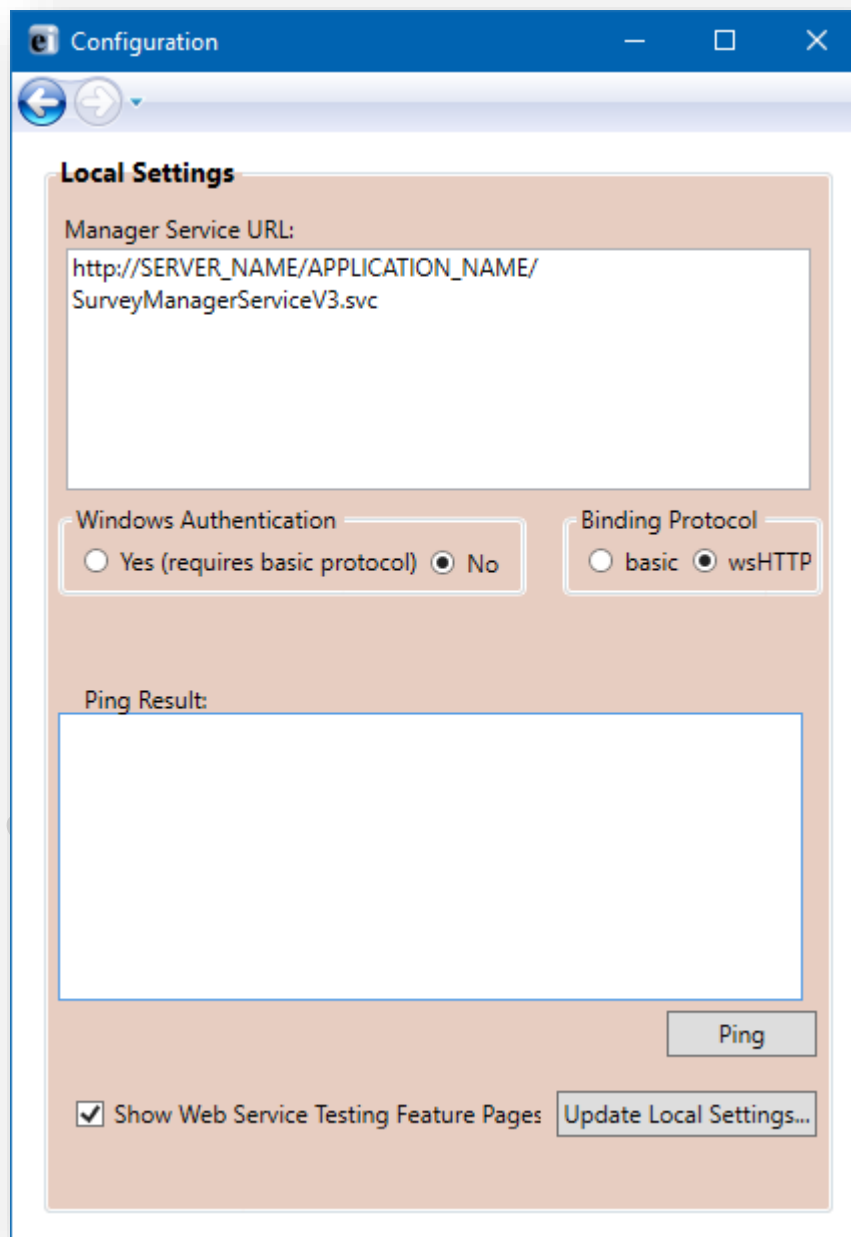


Figure 2: Local Settings showing the Manager Service URL with placeholder text.

1. Replace the placeholder text, highlighted above, with the server name and application name for the Manager Service URL used in your system. Depending on how the site was deployed, the URL may be a single site name followed by the

- name of the manager service, but your IT administrator or web administrator should provide this URL.
2. Select the options for Windows Authentication and Binding Protocol as provided by your web administrator.
 3. To confirm the service is running and that the settings are correct, click the “Ping” button. This tests if the URL entered is working correctly and that Survey Manager Admin Client is able to communicate with Manager Service. If the URL is correct and the communication is successful, the message “Successfully Created Service Client” appears in “Ping Result”.
 4. Click on Update Local Settings button to save the setting in the Survey Manager Admin Client configuration file. While this is an optional step, doing this will allow the Survey Manager Admin Client to store the Manager Service URL and other settings so you don't have to set them the next time you need to use the Survey Manager Admin Client.

5 MANAGING ORGANIZATIONS

The Survey Manager Admin client is most often used to generate the Organization key and add new organizations to the database. Other things you can do is update the organization name, if it needs to be changed, and disable the organization if the team no longer needs it.

The Survey Manager Admin client creates a unique key for each organization. This key is a globally unique identifier and can be distributed to users associated with the organization. The organization key is required to publish the survey to the web and to download the survey responses.

An Admin Key is required to add or edit any organization. The Admin Key is generated in section 1.11.2 step 15 of the Epi Info™ Web Survey Integrated Package Deployment document.

Before the organization can be created the Survey Manager Admin Client has to be configured to communicate with Epi Info Web Survey Manager Service as described in Section 4 of this document.

5.1 Adding an Organization

The following steps outline the procedure to add a new organization using the Epi Info™ Survey Manager Admin Client.

1. Start the Survey Manager Admin Client as described in section 3 above.

Copy and paste (or otherwise type) the Admin Key into the textbox labeled “Admin Key” at the top of the screen.

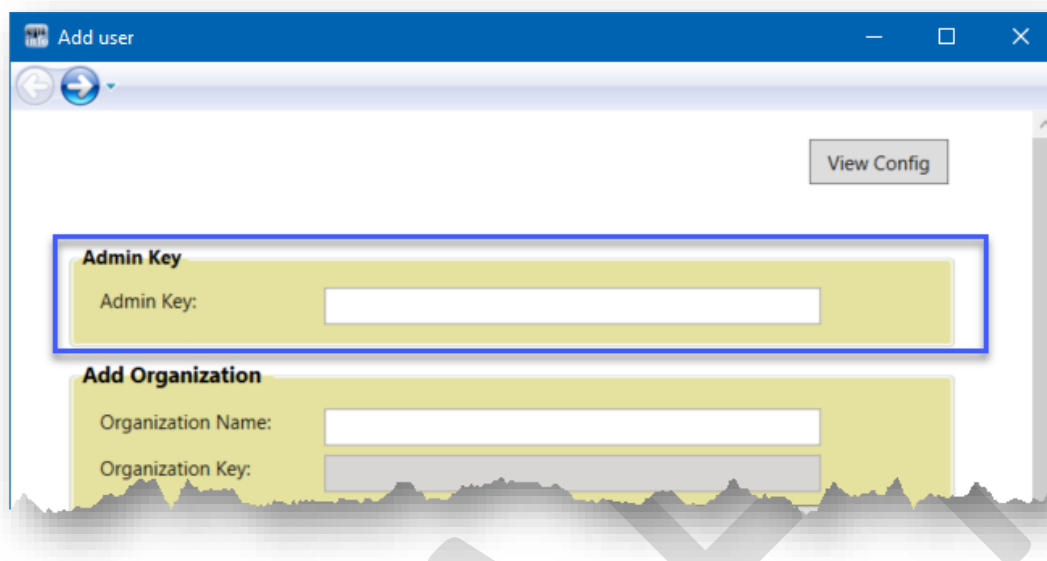
The screenshot shows a web application window titled "Add user". It has a blue header bar with standard window controls. Below the header is a navigation bar with a back arrow and a forward arrow. On the right side of the navigation bar is a "View Config" button. The main content area has a yellow background. It contains two sections: "Admin Key" and "Add Organization". The "Admin Key" section has a label "Admin Key:" followed by a text input field. This section is highlighted with a blue rectangular box. The "Add Organization" section has labels "Organization Name:" and "Organization Key:" followed by their respective text input fields.

Figure 3. Admin Key field on the Add User screen.

Note: If the Admin Key is not entered, the add and edit organization features WILL NOT work.

2. In the area labeled "Add Organization", enter the organization name that is to belong to the Organization Key. This name can be anything you choose to identify the key with the team that will use it. In practice, an organization can be one or more individuals working together on a project or study. Members of the team that need to publish surveys and download results can use the same key, but the team members don't actually use the Organization name. They only use the Key.
3. Click on the "Generate Key" button to create a new GUID for the organization. A unique GUID should be used for each organization.
4. Click on the "Add Key" button to add the new organization to the Epi Info Web Survey database. The "Message" textbox will display a success message when an organization has been added. Any errors that may occur will also be displayed in the "Message" textbox.

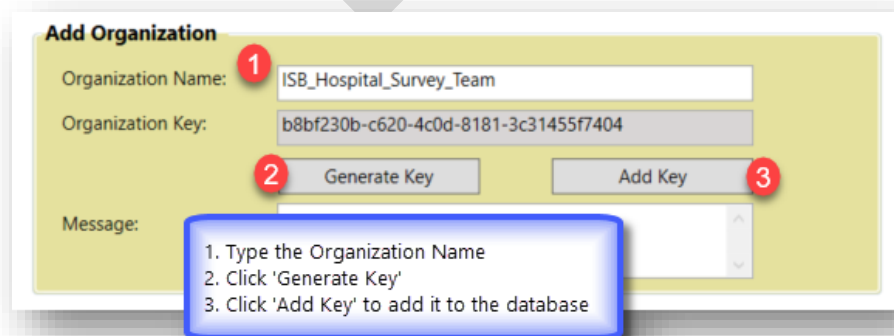
The screenshot shows the "Add Organization" form. It has a yellow background. At the top is the title "Add Organization". Below it are two text input fields: "Organization Name:" and "Organization Key:". The "Organization Name" field contains the text "ISB_Hospital_Survey_Team" and is marked with a red circle containing the number 1. The "Organization Key" field contains a GUID "b8bf230b-c620-4c0d-8181-3c31455f7404". Below these fields are two buttons: "Generate Key" (marked with a red circle containing the number 2) and "Add Key" (marked with a red circle containing the number 3). At the bottom is a "Message:" label followed by a text area. A blue callout box with a white background is overlaid on the bottom of the form, containing the following text: "1. Type the Organization Name", "2. Click 'Generate Key'", and "3. Click 'Add Key' to add it to the database".

Figure 4. Add an organization.

5. In the 'Get Organization Key' box, click the button "Get Organization Names". This populates the "Organization Name" drop down list.
6. Locate the name of the organization you just added. The organization key appears.
7. Click 'Copy' to copy the organization key to the local computer's clipboard.
8. From here, you can paste the organization key to a document or email and send it to the members of the organization so they can begin publishing surveys and importing the collected responses.

5.2 Editing an Organization

In the "Get Organization Key" section, an Admin can change the organization name, retrieve the organization key and change the enable/disable status of an organization to either enable or disable the key. When the "Is Enabled" checkbox is unchecked, that organization will not be able to publish or download web surveys.

The following steps outline the procedure to edit information regarding an existing organization.

1. Start the EIWS Survey Manager Admin Client as described in Section 3 above.
2. Enter the admin key in the textbox at the top of the screen.

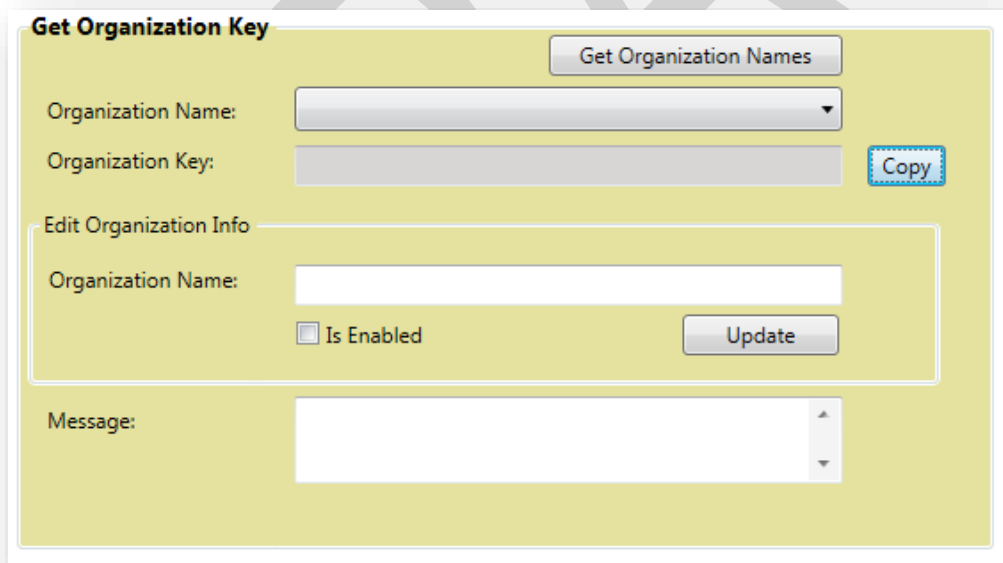


Figure 5: Get Organization Key section

3. Click on the "Get Organization Names" button. This updates the "Organization" drop-down menu with the list of existing organizations.
4. Select the organization that you would like to edit from the "Organization Name" drop-down. The organization key created for that organization is shown.
5. Make any necessary changes to the Organization name or its enabled status and click the "Update" button to save the changes.