



EPI INFO WEB SURVEY SYSTEM SURVEY MANAGER ADMIN CLIENT HELP

Version 1.2
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VERSION HISTORY

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1.1	Sachin Agnihotri	04/10/2013	Edit for clearance
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1 INTRODUCTION

1.1 PURPOSE

The purpose of this document is to provide an overview of key functionalities of Survey Manager Admin Client which are useful for initial configuration of the Epi Info Web Survey system on the web server and for creation of Organization account to publish surveys. This document goes hand in hand with Epi Info Web Survey deployment document and the configuration of Epi Info Web Survey on the web server cannot be completed without this document.

1.2 AUDIENCE

The audience for this document is an Administrator, a Manager or a person responsible for managing Epi Info Web Survey system.

2 INSTALLING SURVEY MANAGER ADMIN CLIENT

The Survey Manager Admin Client needs to be installed to complete configuration of Epi Info Web Survey system on the web server. Survey Manager Admin client is included in the installation package. While the Survey Manager Admin client can be installed on a different machine than the web server, the installation of the Epi Info Web Survey system is a lot easier with Survey Manager Admin Client installed on the web server as well.

2.1 INSTALL SURVEY MANAGER ADMIN CLIENT

The following steps outline the procedure for installing Survey Manager Admin Client

1. Copy the Installer for Survey Manager Admin Client onto your local machine or the web server by copying the SurveyManagerAdminClient folder from the EIWSIntegrated folder
2. Run Setup.exe file. This installs the Survey Manager Admin Client.
3. Survey Manager Admin Client launches immediately after the install operation.
4. You can put the short cut "Epi.Web.SurveyManager.Client" on your desktop, pin to your taskbar or pin to Start Menu for convenience.

3 SETTING UP MANAGER SERVICE

The following steps outlines the procedure to test the Manager service endpoint for the Epi Info Web Survey system using the Survey Manager Admin Client.

3.1 UPDATING MANAGER SERVICE FOR SURVEY MANAGER ADMIN CLIENT

1. Open the Survey Manager Admin Client by clicking on Epi.Web.SurveyManager.Client.

2. Click on the “View Config” button in the top right corner. The screen below will be displayed.

The screenshot shows a window titled "Configuration" with a standard Windows-style title bar (minimize, maximize, close buttons). Below the title bar is a navigation bar with a back arrow and a forward arrow. The main content area is titled "Local Settings" and contains the following elements:

- Manager Service URL:** A text box containing the URL `http://SERVER_NAME/APPLICATION_NAME/SurveyManagerServiceV3.svc`.
- Windows Authentication:** A group box containing two radio buttons: "Yes (requires basic protocol)" (unselected) and "No" (selected).
- Binding Protocol:** A group box containing two radio buttons: "basic" (unselected) and "wsHTTP" (selected).
- Ping Result:** A large empty text box for displaying the result of a ping test.
- Ping Button:** A button labeled "Ping" located at the bottom right of the "Ping Result" box.
- Show Web Service Testing Feature Pages:** A checkbox that is currently unchecked.
- Update Local Settings...:** A button located at the bottom right of the "Local Settings" panel.

Figure 1: Local Settings in the View Config Screen.

3. Enter the URL for the Manager Service in the textbox labeled “Manager Service URL” in Local Settings section. This URL would be provided by the web administrator.
4. Select the appropriate options for Windows Authentication and Binding Protocol required for the service as provided by the web administrator or person who configured the service on the server.
5. Click on the “Ping” button to test 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” will be displayed in the textbox labeled “Ping Result”.
6. Click on Update Local Settings button to save the setting in the Survey Manager Admin Client configuration file. This will result in you not having to type the Manager Service endpoint information again when you want to use Survey Manager Admin Client subsequent times.

4 MANAGING ORGANIZATIONS

The Survey Manager Admin client can be used to add or edit information on Organizations authorized to use Epi Info Web Survey system.

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

An Admin Key generated in previous in Section 4.1 is required to add or edit any organization.

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 3 of this document.

4.1 ADDING AN ORGANIZATION

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

1. Open the Survey Manager Admin Client.

Admin Key

Admin Key:

Add Organization

Organization Name:

Organization Key:

Message:

Get Organization Key

Organization Name:

Organization Key:

Edit Organization Info

Organization Name:

☐ Is Enabled

Message:

Figure 3: Add Organization section

2. Enter the Admin Key in the textbox labeled “Admin Pass” at the top of the screen.
Note: If the Admin Key is not entered, the add and edit organization features WILL NOT work.
3. Now enter the organization name in the textbox labeled “Organization”.
4. Clicking on the “Generate Key” button will create a new GUID for the organization. A unique GUID should be used for each organization.
5. Copy the organization key that is generated. This key can be distributed to authorized users within the organization who would like to publish a web survey and download responses.

6. Clicking on the “Add Key” button will 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.

4.2 EDITING AN ORGANIZATION

In the “Get Organization Key” section, an Admin can change the organization name, retrieve the organization key and enable/disable an organization from publishing a survey to the web.

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

1. Open the Epi Info Admin Client.
2. Enter the Admin Key in the textbox labeled “Admin Pass” at the top of the screen.

Admin Key

Admin Key:

Add Organization

Organization Name:

Organization Key:

Message:

Get Organization Key

Organization Name:

Organization Key:

Edit Organization Info

Organization Name:

☐ Is Enabled

Message:

Figure 4: Edit Organization section

3. Clicking on the “Get Organization Names” button will update the “Organization” drop-down menu with the list of existing organizations.
4. Click on the “Organization” drop-down menu and select the organization that you would like to edit.
5. Selecting the organization will populate the organization key created for that organization. It will also update the “Edit Organization Info” section with organization name and its status.
6. Click on the “Copy” button next to “Organization Key” to copy the key to your clipboard.
7. The Organization Name and status can also be updated in the “Edit Organization Info” section. When the “Is Enabled” checkbox is unchecked, that organization will not be able to publish or download web surveys.

8. Click on the “Update” button to save your changes to the organization. The “Message” textbox will display a success message when any change has been saved. Any errors that may occur will also be displayed in the “Message” textbox.

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