



SelectSurvey.NET IT Staff Training

3 hour course

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SelectSurvey.NET IT Staff Training

In this video course, students will learn all of the basic functionality of SelectSurvey.NET including creating surveys, deploying surveys and viewing reports.

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Course Outline

- Obtaining Technical Support Resources
- Installing SelectSurvey.NET
- Upgrading SelectSurvey.NET
- Add-on Installation
- License Key
- Optimizing and Testing Configuration
- Migrating to SelectSurvey.NET Managed Hosting Service
- Migrating from SelectSurvey ASP Advanced to SelectSurvey.NET





Obtaining Technical Support Resources

General Technical Support Requests

General Technical Support can be obtained by any of the below methods:

- By Email to tech@classapps.com
- By filling in a Trouble Ticket: <http://www.classapps.com/SupportTicket.asp>
- By calling 800-774-4876 (Press 2 to go directly to technical support). Note that if all tech support people are on the phone, that your voice mail will be transcribed and emailed to all tech support staff, and can be answered while they are on other calls, so please leave a message for the fastest response. Also note that only "Level 2" support includes phone support. All other levels include email support only.

When contacting technical support, you will need to provide the below:

- **Customer ID Number (Login):** _ _ _ _ _

The customer ID number and password is assigned and emailed to client upon purchase. The customer ID and password above is used to access product updates, product downloads, renew support, print receipts, print estimates, access to license keys.

Other information on the technical support ticket might include:

- **SelectSurvey.NET Version Number:** v_ . _ _ _ . _ _ _

The database version number is found in the footer of every page in SelectSurvey.NET application.

- **Database Type:** _ _ _ _ _

Supported database types are MS SQL (2005 or later), Oracle (10 or later), or MySQL (6 or later).

- **IIS Version:** _ _

Supported IIS Versions are iis 6, iis 7, iis 7.5 or greater.

Installation Service/Upgrade Service/Consulting Request

To obtain an estimate for installation service, upgrade service or consulting by the hour for survey design, custom reports or programming custom features, contact sales@classapps.com or call 800-774-4876 (press 1 for sales).





Installation Service and Upgrade Service are available for a per instance fee. Currently that fee is \$150 USD. That covers a technical support person that would RDP into the server to update the files in IIS, set permissions on survey folder, and run a database script. The installation service only covers installing the application, and does not include DNS setup, MS SQL install, IIS install or general server setup or network setup.

Consulting is available by the hour, programming and survey design consulting is available, as well as anything above and beyond a normal installation/upgrade service.

Support Knowledgebase

SelectSurvey.NET has a public helpdesk that you can search for common issues. You can access the knowledgebase from here: <http://www.classapps.com/helpdesk/categorized.asp> Click "Search" to search for a keyword.

Support Documentation/Videos

All documentation is linked from the ClassApps.com website as well as included in the product download zip file in the "documentation" folder.

<http://www.classapps.com/SelectSurveyDocumentation.asp>

Videos demonstrating features and installation are located here:

<http://www.classapps.com/Videos.asp>

The general support page that links all support related links is located here:

<http://www.classapps.com/Support.asp>

Product Updates / Critical Security Warnings

Product updates occur each month due to new features, and updates required from new browser releases, or new mobile device releases. Some updates are also required due to security issues that might arise due to vulnerabilities in windows servers, browsers, or other related technology issues.

It is very important to stay aware of any critical security issues or product updates. The way to do this is to sign up for the SelectSurvey.NET RSS feed, or follow the SelectSurvey Twitter or Facebook page. All of these 3 communication channels update automatically any time we make a release. The release summary is posted to each of these sites simultaneously. The full release notes are included in the product download zip, and critical security concerns are only visible from the client login area after logging in. If there is a critical security issue, we post that there is a



critical security issue, and the details of the risk and instructions will be posted in the client login area to minimize risks to client installs.

Product updates can be obtained from any of the following methods:

- RSS Feed: (<http://classapps.com/rss/SelectSurveyupdates.asp>) to add the RSS feed click the RSS Feed button here: <http://www.classapps.com/Support.asp>
- Twitter: <http://twitter.com/SelectSurveyNET>
- Facebook: <http://www.facebook.com/SelectSurvey.NET>

Technical Requirements for Installing SelectSurvey.NET

The requirements for installation SelectSurvey.NET are:

- Dedicated windows server 2003, 2008 or later
- IIS 6 or 7 or later
- .NET Framework 4.0 or later
- MS SQL 2005 or later (Oracle and MySQL also options)
- SMTP (or external mail server)
- Full Trust
- Ability to assign permissions to UploadedImages folder.

Feature Overview SelectSurvey.NET

SelectSurvey.NET is an online web site that allows designing and deploying surveys, forms and polls to email lists or through web links. SelectSurvey.NET can be used for a variety of uses, including equipment tracking, registrations, surveys, forms, Human Resources surveys, testing and assessment, customer satisfaction, and internal business data collection.



Class Activity: Teacher will show brief overview of SelectSurvey.NET by creating a survey and covering the basic functionality.

Installing SelectSurvey.NET

We have posted a reference video of an entire SelectSurvey.NET installation here:

<http://www.classapps.com/Videos/InstallDemo/InstallDemo.htm>

The installation manual is located in the "Documentation/install" folder inside the product download zip file. This installation manual can be viewed from here:

http://www.classapps.com/Documentation/SelectSurveyNETInstallGuide_v4.089.pdf

For the latest version of the install guide, please refer to the version that is in the documentation folder of the zip file of the product.

Class Activity: Teacher will demonstrate installation of SelectSurvey.NET.

Upgrading SelectSurvey.NET

A reference document for upgrading all versions of SelectSurvey.NET and add-ons is posted here:

<http://www.classapps.com/Documentation/UpgradeProcess2013-2.pdf>

This document or latest version of this document can be in the product download zip file in the "documentation/install" folder. Always refer to the product download zip for the latest documentation reference.

Class Activity: Teacher will demonstrate upgrade of SelectSurvey.NET.

Add-On Installation

Installation for SelectSurvey.NET add-on's is detailed in either SelectSurvey.NET install guide, or the install guide that is included with the product in the documentation folder of the product download zip file.

All documentation is also linked here: <http://www.classapps.com/SelectSurveyDocumentation.asp>



Class Activity: Teacher will demonstrate steps for enabled Add-On.

License Keys

All products contain license keys. License keys are emailed upon purchase, and also viewable from the custom account product download page which is accessible 24x7 with your customer login for the full year(s) that you have support active. All add-ons for SelectSurvey.NET also have license keys. The license keys for SelectSurvey.NET add-ons go into the core SelectSurvey.NET web.config file in the places provided and labeled as such. Below are the various license key placeholders in the SelectSurvey.NET web.config file.

```
<!--SelectSurvey.NET licensing key, retrieve from your customer account page on  
classapps.com. This license is required to run. -->  
<add key="LICENSE_KEY" value=""/>  
  
<!-- License Key for Active Directory Integration Add-On -->  
<add key="AD_LICENSE_KEY" value=""/>  
  
<!-- License Key for SelectPoll Add-On -->  
<add key="POLL_LICENSE_KEY" value=""/>  
  
<!-- ActiveLogic(TM) add-in license key for completion logic capabilities -->  
<add key="ACTIVE_LOGIC_LICENSE_KEY" value=""/>
```

Class Activity: Teacher will show and explain web.config settings.

Maintenance and Backups

Maintenance plans and daily backups of data in IIS and database are necessary for the SelectSurvey.NET application. All data stored in the application is stored in the database except for files that were uploaded using the “respondent file upload” question type, or from the admin interface for branding the application. There will be times when despite the features in place to prevent users from accidentally deleting surveys and responses, that they will delete them anyway. If this happens you will need to restore a backup of the database and use the tools in the admin interface of the application to restore the various deleted items.

MS SQL Backups

Since all data is stored in the database, a minimum of daily database backups, stored for 30 days would be recommended. That way, if a user accidentally deletes surveys or responses they can be restored using the admin interface of SelectSurvey.NET.





File System Backups

The "Respondent file upload" question type allows respondents to upload files such as resumes through the SelectSurvey.NET application to be associated with survey responses. Those files go into a folder that has special permissions in IIS labeled "UploadedImages". Files that should be backed up daily are:

Folders: "UploadedImages"

Files: web.config

Class Activity: Teacher will show how to restore a deleted survey.

Migrating to SelectSurvey.NET Managed Hosting Service

If you are looking for a maintenance free, fully managed SelectSurvey.NET service it is available, with details at: <http://selectsurvey.net>.

For a small monthly fee your survey software is updated automatically, backed up daily with off-site backup service, custom URL is available, migration of database is also available.

You won't lose any data migrating from a SelectSurvey.NET server software on your server to the SelectSurvey.NET Hosted service. All you do is provide a backup of your latest database and we upgrade and restore it into your hosted account for you.

Many clients find that the SelectSurvey.NET Hosted Service is easier, and less expensive than maintaining an in house installation.

Migrating from SelectSurvey ASP to SelectSurvey.NET

All older versions of SelectSurvey can be upgraded and migrated to the latest version of SelectSurvey.NET. We provide upgrade scripts to upgrade every version of SelectSurvey to the latest version, as well as detailed upgrade documentation.

The upgrade process document for all products is located here (as well as in the documentation folder of the product download zip file for SelectSurvey.NET):

<http://www.classapps.com/Documentation/UpgradeProcess2013-2.pdf>

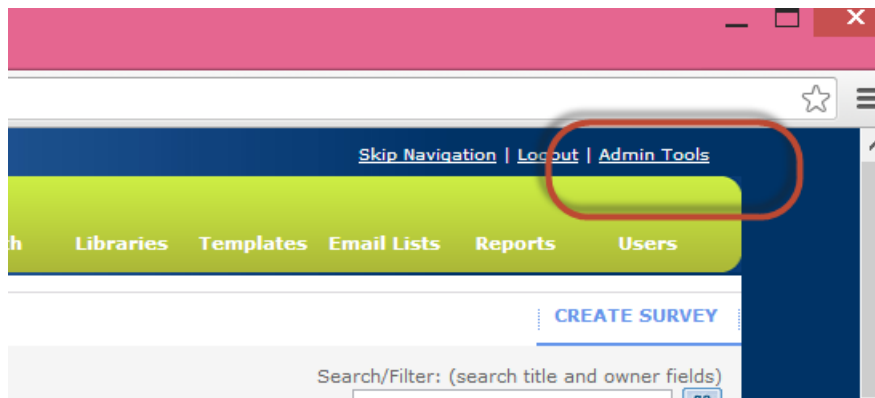
Admin Tools for Configuring SelectSurvey.NET

The admin login role accounts have access to a wide set of admin tools in the SelectSurvey.NET interface. The admin tools can be accessed from the “Admin Tools” link in the upper right corner of every page in the application.

Class Activity: Teacher will demonstrate and explain Admin Tools features and settings.

First, login using and admin account.

Second, click “Admin Tools” link.



Below are the various tools you will have access to:

- Account Usage
- General Configuration
- Application Wide Settings
- Debug Database Connection
- Database Version
- View Logs, Clear Logs
- Database Validation Tool for Surveys
- Database Validation Tool for Libraries
- Data Copy Utility

- User Data Copy Utility
- Delete Report Filters
- Debug Install SMTP Settings – Send Test Email
- Decrypt EID Link or SurveyID
- Specify Company Logo and Copyright Text
- Globalization and Custom Text
- Translate / Edit Global Text
- Translate / Edit Admin Area Text
- Debug International Date Formats
- Unlock Surveys
- Kiosk Admin
- XML Generator Admin
- View Uploaded Images/ Files – Upload Image/File
- Activate / De-Activate Question Types
- Active Directory User Field Synchronization Mapping

MS SQL Email Notifications of SelectSurvey.NET account changes

You can configure MS SQL db mail to send emails to the admin when passwords or other SelectSurvey.NET admin accounts change. To do this, first dbmail must be configured in SQL Server.

For MS SQL 2012 and higher (the configuration wizards are NOT available in EXPRESS versions)

To start the **Database Mail** Configuration Wizard, in Object Explorer, expand the Management folder in **SQL Server** Management Studio, right-click **Database Mail**, and select Configure **Database Mail**. Select View or change system parameters and click Next to continue.

Consult Microsoft documentation for specific instructions: <https://msdn.microsoft.com/en-us/library/hh245116.aspx>



Currently, in SelectSurvey.NET admin tools you can view successful and unsuccessful login attempts from the "view/clear logs" screen. Notifications of account updates will also be in these logs.

To configure from query analyzer, below is an example of the simplest steps required to send email from the trigger. This is an example only!

```
-----optional to activate email notifications -----  
---set up MS SQL dbmail if not already ----  
USE [master]  
GO  
sp_configure 'show advanced options',1  
GO  
RECONFIGURE WITH OVERRIDE  
GO  
sp_configure 'Database Mail XPs',1  
GO  
RECONFIGURE  
GO  
-- Create a New Mail Profile for Notifications  
EXECUTE msdb.dbo.sysmail_add_profile_sp  
    @profile_name = 'DBA_Notifications',  
    @description = 'Profile for sending Automated DBA Notifications'  
GO  
-- Set the New Profile as the Default  
EXECUTE msdb.dbo.sysmail_add_principalprofile_sp
```



```
@profile_name = 'DBA_Notifications',
```

```
@principal_name = 'public',
```

```
@is_default = 1 ;
```

```
GO
```

```
-- Create an Account for the Notifications
```

```
EXECUTE msdb.dbo.sysmail_add_account_sp
```

```
@account_name = 'SQLMonitor',
```

```
@description = 'Account for Automated DBA Notifications',
```

```
@email_address = 'sales@classapps.com', -- Change This
```

```
@display_name = 'SQL Monitor',
```

```
@mailserver_name = '127.0.0.1' -- Change This
```

```
GO
```

```
-- Add the Account to the Profile
```

```
EXECUTE msdb.dbo.sysmail_add_profileaccount_sp
```

```
@profile_name = 'DBA_Notifications',
```

```
@account_name = 'SQLMonitor',
```

```
@sequence_number = 1
```

```
GO
```