



Select Survey .NET

v5

IT Staff Training



SelectSurvey.NET IT Staff Training

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Course Outline

- Obtaining Technical Support Resources
- Feature Overview
- Admin Tools
- 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:

- Email to tech@classapps.com this automatically creates a support ticket in our helpdesk, and you will receive a tracking number immediately.
- By filling in a Trouble Ticket: <http://www.classapps.com/SupportTicket.aspx>
- By calling 800-774-4876 (Press 2 to go directly to technical support). Please leave a message.

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

- **Customer ID Number:** _ _ _ _ _

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.

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 \$200 USD. That covers a technical support person that would be on a screenshare via webex or another screenshare program on 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.aspx>

Videos demonstrating features and installation are located here:

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

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

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

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 follow the SelectSurvey Twitter or Facebook page, or check the client portal on classapps.com after logging in and navigating to "product downloads". All of these 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:

- Twitter: <http://twitter.com/SelectSurveyNET>
- Facebook: <http://www.facebook.com/SelectSurvey.NET>



Technical Requirements for Installing SelectSurvey.NET on-premise

The requirements for installation SelectSurvey.NET are:

- Dedicated windows server 2008 - 2019 or later
- IIS 6 or 7 or later
- .NET Framework 4.6.1 or later
- MS SQL Server 2008R2 or later (Standard, Web, Enterprise editions) – one database for Archive and one for Production.
- SMTP (or external mail server such as sendgrid)
- Full Trust
- Ability to assign permissions to UploadedImages folder on filesystem.
- Antivirus
- SSL certificate
- Firewall

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.

Admin Tools

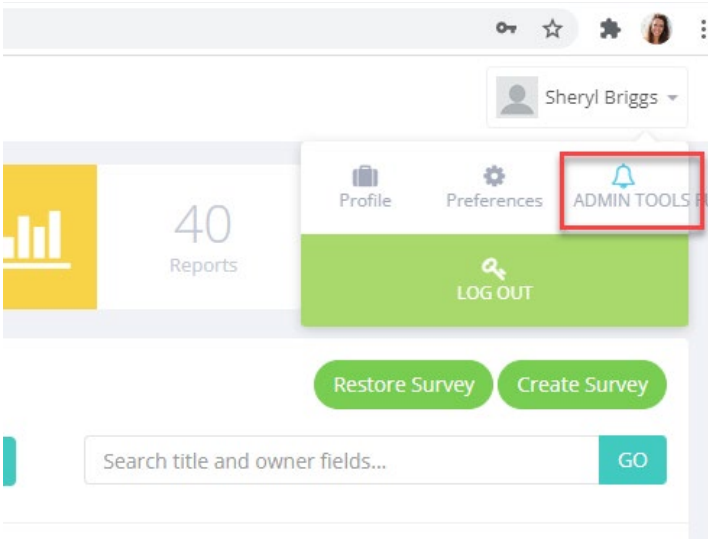
There are many global admin tools built into the application to make the tech life easier.

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

Login with an admin login and click “admin tools” from your user icon in the upper right corner.



In admin tools click on "Application Wide Settings"

Account Usage
[View Your Account Usage](#)
View your account usage.

API and Web Service
[View Survey API Methods](#) [View Survey Web Services](#) [API Login Encryption Tool](#)
API and Web Services for access and integration with 3rd party applications.

General Configuration
[View General Configuration](#)
General configuration settings based on web.config file are displayed here for admin troubleshooting.

Application Wide Settings
[Change Application Wide Settings](#)
Application wide settings that should only be modified by an administrative IT person. These settings will cause serious malfunction of the application.

Database and Web Service Utilities
[Database Tokens \(Nicknames\) used in Dynamic Tokens and Database Question Types](#)



On this page you will have all the settings that you will need to review after installation/upgrade. Review every item on this page and click save at the bottom of the page after install/upgrade.

1. URL Settings

Application Support Email Address

sales@classapps.com

Default is "sales@classapps.com". This should be your support email address at your company.

Application Root URL (Default External URL)

http://43.selectsurvey.net/salesforcetoday

Default is "http://www.classapps.com/Demos/SelectSurveyNET". This should be the production URL you installed the survey application.

Application Intranet (Internal URL) - Optional

Optional - the internal intranet where you installed the survey application which is only accessible on your company network.

Release Version

5.053.000

The current release version.

Customer ID

623384

The customer ID that is used for SelectSurvey support.

2. Date Time/ Language Defaults

Survey Application Display Date Format

1 USA (mm/dd/yyyy) ▾

Default is "1". This determines how dates are displayed in the Admin interface, despite how they are stored in the database.

Server Date Format

1 USA (mm/dd/yyyy) ▾

Default is "1". This determines how dates are stored in the server database, despite how they are displayed in the Admin area.

Date Delimiter

/ ▾

Default is "/". Select the date delimiter that will be used for display in the admin area. This value must match the format in the database. If unsure, select "/".

Globalization Language Code

en English ▾

Default is "en". Select the primary language of the admin area that will be used as the html language setting on each page in the admin area. Note that the take survey pages have the language that is set on the survey options page that over-rides this language on the take survey pages.

Globalization LCID

English - United States ▾

Default is "1033". Select the locale for the admin area which is also used for the datetime settings.

Built in Archive & Restore

There is a separate database for Archive and Production. The Archive database holds only archived surveys. When a user clicks "Archive" the survey is copied to the archive database, and permanently deleted from the production database.

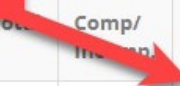
To restore an archived survey they click "Restore" button, select the archived survey from the list, and click "Restore". They can also delete an archived survey. This would be a permanent deletion.

Active Surveys Restore Survey Cre

Set Default Folder on User Preference Page

--All Surveys-- owner fields...

Manage	Status	Title (click to preview)	Date Created	Design	Options	Deploy	Analyze	Roll	Comp/ (In Progress)	Archive	Del
LAUNCH	Design	example	10/08/2021					0	0 / 0		
LAUNCH	Design	test 9-21-2021	09/21/2021					0	0 / 0		
CLOSE	Open	Math logic example	09/08/2021					6	1 / 5		

Click to Archive
 

Restore Archived Surveys

This allows you to restore a survey that you "archived" into the "archive" database which no longer shows in the survey list page. If you do not have an archive database, then you will not see archived surveys here. If you do not have an archive database, merely click "unarchive" on the survey in the list. If you have an archive database, they are removed from the production database and will no longer show on the survey list page. This is the process of moving data back from your archive database to your production database.

Restore a Survey

Restore Survey from Archive Database to Production Database

This page is for survey owners to unarchive and copy a survey from the archive database to the production database.

If you do not have an archive database or need help, email tech@classapps.com.

Restore Survey Responses Along with Survey

Click below button to start the restore:

Delete Survey

Restore Survey

(This may take a few moments, especially if copying large amounts of responses. Only click once and wait for completion message below)

Completion Message:

Built in Logging and Ability to View Logs

After installation, you can use the interface to view and clear logs related to SelectSurvey.

This is very helpful for troubleshooting and also to see who has logged in or modified their account recently.

To access the Logs click "Admin Tools" > "View/Clear Logs".

Clear Error and Response Deletion Log

Clear Login and Account Update Log

Clear History Tracking

Login Type:

Successful Login and Account Update Log ▾
Successful Login and Account Update Log
Unsuccessful Logins
Error and Response Deletion Log

view

Select the log you want to view and click "View".

User Permissions/Roles

In SelectSurvey you can set permissions on user groups, surveys, reports, folders, templates, etc.

User Roles/Permissions:

"User Role": Can only take surveys, edit their account, and see their own user workspace.

"Report Share Role": Can only view reports they were invited to from an email link after they login.

"Create Role": Can take surveys, create surveys, create reports for surveys they own, and see the main survey dashboard.

"Edit Role": Can only edit surveys, cannot create surveys or reports.

"User Management Role": Can only manage users.

"Admin Role": Can do and see everything

Built in Account Usage Reports

After installation, you can view account usage by going to "Admin Tools" > "Account Usage".

You can see how many paid accounts you have and the usage. You can also automatically deactivate any users that have not logged in in over 365 days.

Account Usage Details

[View Open Surveys and Owners](#)

[Deactivate Users That have not logged in over 365 days](#) (Only affects create role and higher)

Current Paid Accounts:

Current Utilized Accounts:

Available Accounts:

Number of Admin Role Users: 1

Number of Create Role Users: 1

Number of User Role Users: 2

Number of User Management Role Users: 0

Number of Surveys: 20

Database Size: 89.50 MB

Top 25 Survey Owners:

SURVEY COUNT	EMAIL EMAIL
20	sales@classapps.com

Users that have logged in over the last 365 days:

USER ID	EMAIL ADDRESS	ROLE ID
1	sales@classapps.com	3

Responses By Month for last 2 years:

MONTH	YEAR	RESPONSE COUNT
4	2020	95
11	2020	43

Database Tokens

During install, you would create a data reader user in the SQL database. This will be used for database tokens which you then would set up on the “Admin Tools” > “Database and Web Service Utilities” page.

cause serious malfunction of the application.

Database and Web Service Utilities


Database Tokens (Nicknames) used in Dynamic Tokens and Database Question Types

Database tokens are nicknames stored in the database associated with various database connection strings used for dynamic tokens, or database question types. This feature allows admins to add connection strings, whereas the create user will only see the token nickname for the connection string and never see the full connection information.

Database Tokens Assignment

This page allows assignment of database tokens (or nicknames) for database connection strings used in dynamic tokens or database question types.

CREATE DATABASE TOKEN

Delete	Database Token Nickname	Database Type	Database Driver	Edit
<input type="checkbox"/>	salesforcetodayDataReader	SQLServer	SqlClient	
1				

Click “Create Database Token” and enter the connection string with the user you created in SQL for the READ ONLY datareader. This is typically used for complex queries for dynamic piping tokens, filling custom dropdowns from custom tables, etc. (not core functionality). If this is not configured, and a user tries to use the features related to this, it will say “a database token has not been configured, contact your IT dept”.

Add Database Token (Nickname):

Token/Nickname:*

Token Nicknames must be unique. No special characters are allowed.

Select Database Type:*

*Oracle is no longer supported.

Select Database Driver:*

MS SQL Example: Server=servernameorip;Database=databasename;UID=putusername;PWD=password;

MySQL Example: database=classapps;server=localhost;uid=root;pwd=;pooling=true;

Oracle Example: Provider=OraOLEDB.Oracle;Data Source=MyOracleDB;User

Id=myUsername;Password=myPassword;

*Oracle is no longer supported.

Connection String:*

Web Service Tokens

During install, if you plan to support Virtual Incentives rewards, or Adobe Workfront integrations, you will need to configure a web service token for the connection.

Click "Admin Tools" > "Web Service/API Tokens Assignment".

Database and Web Service Utilities

Database Tokens (Nicknames) used in Dynamic Tokens and Database Question Types

Database tokens are nicknames stored in the database associated with various database connection strings used for types. This feature allows admins to add connection strings, whereas the create user will only see the token nickname the full connection information.

Web Service/API Tokens used in Dynamic Tokens and Database Question Types

Web Service tokens are nicknames stored in the database associated with third party web service ASMX URL, credential question types from a web service or API call to an external API.

Web Service/API Tokens Assignment

This page allows assignment of web service/API tokens (or nicknames) for third party web service/api used in dynamic tokens or data

Add Web Service/API Token (Nickname):

Web Service Token Nickname:*

Token Nicknames must be unique. No special characters are allowed.

Example: country

Web Service Name (SOAP) or Web Service Contract (WCF)*

No special characters are allowed.

SOAP Example: country

WCF Example: IAdministration

Web Service/API URL (SOAP) or Web Service Endpoint (WCF): *

i.e. http://your.com/yourapi.asmx

SOAP Example: http://www.websvicex.net/country.asmx

WCF Example: http://webservices.com/webservices/Administration.svc

Web Service/API Method: *

Enter the method for this API ex: GetCountries() The arguments, if any, are specified on the edit item page.

Example: GetCountries

Optional Additional Configuration:

Web Service/API Credentials Username: *

Enter the username required to access the API.

Example: (leave blank)

Web Service/API Credentials Password:*

Enter the password required to access the API.

Example: (leave blank)

Web Service/API Credentials Encryption Key:*

Must be over 8 characters long, or left empty. Enter the encryption key used by the API to encrypt/decrypt login credentials.

Example: (leave blank)



Installing SelectSurvey.NET

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

https://www.classapps.com/Documentation/SelectSurveyNETInstallGuide_v5.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.

This installation guide includes details on setting up various login integrations including ActiveDirectory/ADFS/Azure.

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:

<https://www.classapps.com/Documentation/upgradeprocess2019-v5.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.aspx>

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

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: https://www.classapps.com/pricing_hosted.aspx

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):

<https://www.classapps.com/Documentation/upgradeprocess2019-v5.pdf>

MS SQL Email Notifications of SelectSurvey.NET account changes

Update - there is now a setting in Admin Tools > Application Wide Settings to automatically be emailed when ownership changes.

Legacy only:

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
```