



Installation Guide

This document describes how to install SurveyView and the add-on modules, configuration settings, and a Troubleshooting section.

SurveyView Admin
SurveyView Enterprise
SurveyView Enterprise ODBC
SurveyView Pocket
SurveyView Palm

Covers version 5.0



CONTENTS

Version Overview	3
Installing SurveyView Admin	4
Installing SurveyView Enterprise /Enterprise ODBC	5
The SurveyView Graph Engine and the CreateChart.asp file	9
Web Permissions and NTFS Permissions	10
Installing SurveyView Pocket/Palm	12
Setting the Password	13
Manual Configuration of the survey .asp file	14
Reviewing the analysis .asp	15
Migrating an Access database to SQL Server or Oracle	16
Troubleshooting Web Surveys	18
Troubleshooting SurveyView Admin	19
Contact Information	20

Version Overview

SurveyView Admin

SurveyView Admin is installed **locally** on your computer. (It is not installed on your server.) SurveyView Admin is the central survey management tool, and is needed for all versions of SurveyView. There are two different versions of Admin:

- ◆ **SurveyView Admin:** has all available functionality
- ◆ **SurveyView Admin Lite:** has no Web survey functionality and no testing/scoring module. All other features are available.

SurveyView Enterprise add-on

SurveyView Enterprise is the software that is installed on your Web Server. SurveyView Enterprise is a collection of runtime files that enable you to efficiently handle Web-based responses. SurveyView Enterprise is used with the default Access database format. Surveys are created with SurveyView Admin, and then posted to the server where Enterprise is running.

SurveyView Enterprise ODBC add-on

SurveyView Enterprise ODBC is installed on your Web Server. SurveyView Enterprise ODBC is a collection of runtime files that enable you to efficiently handle Web-based responses, used with the Oracle or SQL Server database format. Surveys are created with SurveyView Admin, and then posted to the server where Enterprise ODBC is running.

SurveyView Pocket/Palm add-on

SurveyView Pocket/Palm is a module that you load onto a Pocket PC or Palm device. Using SurveyView Admin, you create a Pocket PC or Palm version of your survey and load this onto your Pocket PC/Palm. Interview data will be stored on your handheld device. Import interview data using SurveyView Admin.

Installing SurveyView Admin

Where to install

Locally on your desktop computer (**not** on the Server).

How to install

- 1) Download surveyview5setup.exe from <http://www.surveyview.com>
- 2) Double-click on the file to install.

System Requirements

- ◆ Windows 95/98/NT/2000/NT
- ◆ 45 MB hard disk space *

Note: The SurveyView installation consists of three steps:

- 1) Checks whether the Windows Installer is installed.
If not, it will install the Windows Installer.
- 2) Checks whether MDAC 2.5 (Universal Data Access) or higher is installed. If not, it will install MDAC 2.5.
- 3) Installs SurveyView Admin.

Windows 2000 and XP: already come with Windows Installer and MDAC 2.5 or higher, so steps 1-2 are skipped.

Windows 95, 98 and NT: do not come with Windows Installer and MDAC 2.5 or higher by default, so the installations in steps 1-2 may take place, followed by re-boots.

* To successfully complete steps 1-2, your system may require as much as 100 MB free space on the drive where the **TEMP** directory is located (normally on the same drive as Windows), although the final SurveyView installation only requires 45 MB.

Note to Windows 95 users: The very earliest versions of Windows 95 did not include a required file called DCOM95. To download, see <http://www.microsoft.com/com/dcom/dcom95/download.asp>

Installing SurveyView Enterprise/SurveyView Enterprise ODBC

Note: SurveyView Enterprise and SurveyView Enterprise ODBC utilize the same setup. When you purchase a license, you will receive a password that determines which version you are running.

Where to install

On the Server where your Web Server resides.

System Requirements

- ◆ Windows NT 4.0 (with option pack) or Windows 2000
- ◆ IIS Web Server installed (included in Windows 2000, part of the option pack for NT)
- ◆ MTS (Microsoft Transaction Server) - part of Windows 2000—for NT 4.0, you have to download the option pack and install MTS.
- ◆ 30 MB hard disk space

How to install

The Enterprise/Enterprise ODBC installation consists of 3 steps:

- ◆ **Step A:** Installing files
- ◆ **Step B:** Creating a user under which to run the MTS package
- ◆ **Step C:** Creating MTS Package and Registering components

Step A: Installing the files

- 1) Download surveyviewenterprise5setup.exe from <http://www.surveyview.com>
- 2) Double-click on the file. This will install on your server:
 - ◆ Microsoft ADO (Active Database Objects)
 - ◆ Visual Basic 6.0 runtime files
 - ◆ Microsoft DAO 3.51 Jet engine (the Access database engine)

Cont.

Step B: Creating a user under which to run the MTS package

The following describes the **minimal** user rights you have to assign to the user that you create to run the SurveyView Enterprise MTS package. If you just want to set up a test, you can **temporarily** set up the SurveyViewUser with Administrator rights—this should of course be changed later.

- 1) Create a new user called "SurveyViewUser" and set a password for this user (This password needs to be re-entered when creating the MTS package, in step C). Make SurveyViewUser a "Restricted User".
- 2) Give the SurveyViewUser the following NTFS Permissions (in Windows Explorer, right-click on the folder, select **Security**, click on **Advanced**) - these are the **minimal** rights required:

Folder	Permission	Apply to
\windows (Win2000) or \winnt (NT)	READ	THIS FOLDER ONLY
\windows\system32 (Win2000) or \winnt\system32 (NT)	READ	THIS FOLDER ONLY
\windows\system32\com (Win2000) or \windows\system32\mts (NT)	READ	THIS FOLDER ONLY
\Program Files\Common Files	READ	THIS FOLDER, ALL FILES, AND ALL SUB-FOLDERS

- 3) Give SurveyViewUser 'Advanced User Rights' to "Log on as a Batch Job" :

In Win2000:

Click on Control Panel | Administrative Tools | Local Security Policy
Under Local Policies, choose User Rights Assignment
On the right -hand side, double-click "Log on as a batch job"
Add SurveyViewUser to the list.

In NT:

Open 'User Manager'
Click 'User Rights'
Choose 'Show advanced user rights'
From the drop-down list, choose "Log on as a batch job"
Add SurveyViewUser to the list.

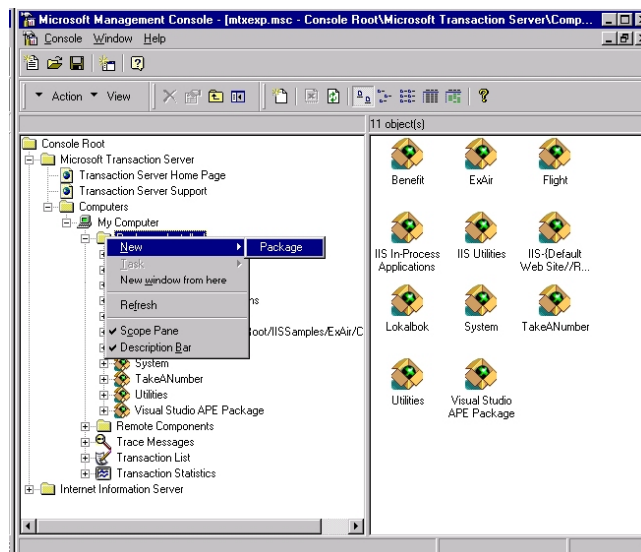
Cont.

Step C: Creating MTS Package and Registering Components

In MTS it is necessary to create a “package”. This is a logical container inside which SurveyView’s components will be run. In NT, this is done in the Microsoft Management Console. In Windows 2000, this is done using the **Component Services** window (Control Panel | Administrative Tools | Component Services).

In Windows NT:

1. Start the Management Console (MMC) from the program group “NT Option Pack”.
2. Navigate down to the MTS-packages installed on the particular server, right-click with the mouse, and choose “New-Package”.
3. Choose “Create empty package”. Then give the application a name, like “SurveyView”. Then assign the user you created in step B, to the package. Type in the password (if any) for the user.
4. Double-click on the SurveyView package/application. Select the Components folder and right-click on it.
5. Select New Component
6. Select Install New Component
7. Select **mts_mvbusops.dll** and **mts_mvdb.dll** from c:\Program Files\SurveyviewEnterprise (select both by holding down CTRL when selecting).
8. Click on Open, Next, Finish.

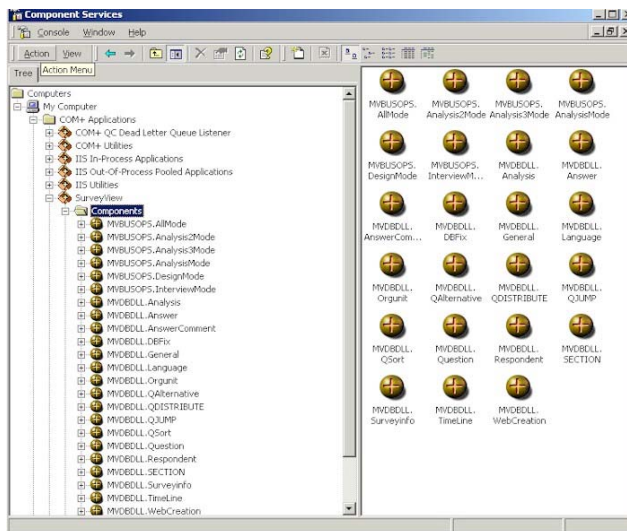


The NT Management Console window

Cont.

In Windows 2000:

- 1) Select Control Panel | Administrative Tools | Component Services.
- 2) Select COM+ Applications and right-click.
- 3) Select New Application.
- 4) Select "Create an empty application".
- 5) Give the application a name, like "SurveyView" and select Server Application.
- 6) Under "This User", select the account you created in Step B and enter the password, (if any). Click Next and Finish
- 7) Double-click on the SurveyView package/application.
- 8) Select the Components folder and right-click on it.
- 9) Select New Component
- 10) Select Install New Component, and select **mts_mvbusops.dll** and **mts_mvdb.dll** from c:\Program Files\Surveyviewenterprise\ (you can select both at the same time by holding down CTRL when selecting).
- 11) Click on Open, Next, Finish.



*Windows 2000
Component Services Window*

That's it—you are now done with the SurveyView Enterprise/Enterprise ODBC installation.

The SurveyView Graph Engine and the CreateChart.asp file

The Graph Engine

SurveyView uses a graphing-engine to create graphs for some of the live reports.

Where to place the CreateChart.asp file

The CreateChart.asp file is a file that enables you to display real time graphs on your Analysis Web Page. This file has to be located in **each** folder that you are placing Analysis .asp pages in.

The CreateChart.asp file can be found in the SurveyViewEnterprise folder.

Web Permissions and NTFS Permissions

There are several ways to allow or restrict access to both the .asp pages and the database. These settings may vary widely, depending on your particular needs. This section assumes you are already familiar with how to set Permissions under Windows NT or Windows 2000.

*****Important*****
**After making changes to user groups or user rights,
RESTART YOUR COMPUTER!!**

Using Anonymous Access

For the most part, users accessing your Web server are doing so with an Anonymous login – the user does not need to enter a username/ password. This is known as Anonymous Access (this is set from Control Panel | IIS Manager – right click on the Web Site and choose Properties – click on Directory Security to enable Anonymous Access). For Anonymous Access, IIS makes use of a special user account called *IUSR_computername*, where *computername* is the name of your server. This account was created during IIS installation. When setting permissions for the .asp-pages, you will need to give *IUSR_computername* Read and Execute rights.

Web Permissions

The directory where the .asp files are located have to be Scripts-enabled. This is done in the MMC (Windows NT) or the IIS Manager (Windows 2000). Right-click on the directory, and click on Properties – set Execute Permissions to Scripts.

NTFS Permissions for the .asp pages

You can also restrict access to your survey .asp pages on the file or directory level. You need to give the user accessing the .asp pages Read and Execute permissions. (If using Anonymous Access, the user account is *IUSR_computername*).

Cont.

NTFS Permissions for the database

Access to the database is done in a different way. It is actually MTS that accesses the database, so therefore you have to give the MTS user (This is the SurveyViewUser as defined in step B) Full Control to the database. This is true, even if you are using Anonymous access.

Special Note on C2 Security

If you are using C2 security and IIS 4.0 , the registry key Hkey_Local_Machine\Software\ODBC may only have Read Permissions. This has to be changed to Full Control for the Web user account. If this is not set, you may not be able to access the database and you will get an error. For more information, see the following Microsoft article:

http://support.microsoft.com/support/kb/articles/Q238/9/71.ASP?LN=EN-US&SD=gn&FR=0&qry=C2%20Security%20ODBC&rnk=4&src=DHCS_MSPSS_gn_SRCH&SPR=MSALL

Installing SurveyView Pocket/Palm

The SurveyView Pocket/Palm modules are loaded onto your handheld device. Survey files are then created using SurveyView Admin and also loaded onto the device. Pocket PC survey files have extension ,svd, and Palm survey files have the extension .pdb.

Where to install

On your Handheld device (Pocket PC or Palm)

How to install

- 1) Download surveyviewpocket.zip or surveyviewpalm.zip from <http://www.surveyview.com>
- 2) Double-click on the file to open the Zip-folder
- 3) Click on Setup.exe to schedule an install.

For more information on SurveyView Pocket/Palm, please refer to <http://www.surveyview.com>.

Setting the Password

In SurveyView Admin

1. In SurveyView Admin, select Help | Set Password
2. Enter the user name and password
3. Click Register

In SurveyView Enterprise/Enterprise ODBC

1. Locate the file Enable-SurveyViewEnterprise.exe (in the SurveyViewEnterprise folder) and double-click on it.
2. Enter the user name, password and select whether you are registering SurveyView Enterprise or SurveyView Enterprise ODBC.
3. Click on Register

Manual Configuration of the survey .asp file

SurveyView Admin automatically creates the survey .asp for you. The function of the survey .asp is to collect data into the database. The location and the name of the database are specified when the .asp-file is created. In the survey .asp, the database name is kept in a field called **GENSurveyID**, and the path in a field called **GENSurveyPath**.

When you create the survey page, (and if you are using Enterprise or Enterprise ODBC), you may not know where your Systems Administrator will want to locate the database. The path can in that case be changed manually after the survey .asp page has been created.

Open the survey .asp in Notepad. Locate the following code:

```
<FORM ACTION='Employee Survey.asp' METHOD='POST'>
<INPUT type=hidden NAME='GENMVSURVEYLANG' value='E'>
<INPUT type=hidden NAME='GENMVTYPE' value='Surv'>
<INPUT type=hidden NAME='GENSurveyID' value='Employee Survey'>
<INPUT type=hidden NAME='GENSurveyPath' value='C:\INETPUB\SCRIPTS\'>
<INPUT type=hidden NAME='GENTimeLineSeriesNo' value='1'>
<INPUT type=hidden NAME='GENOrgUnitId' value='1'>
<INPUT type=hidden NAME='GENThanks' value=''>
<INPUT type=hidden NAME='UseMode' value='Response'>
```

Note the GENSurveyID and GENSurveyPath fields. These are the only two fields that may need to be changed (if the person creating the survey did not know where the database would be located).

Important! If you are using Survey View Enterprise ODBC, the GENSurveyPath, will instead hold the Username and the Password (in the format "UID=uid;PWD=pwd;")

Reviewing the analysis .asp

An analysis .asp can also be created using SurveyView Admin. The function of the analysis .asp is to display real time data and graphs from the database.

There are only two values you might consider changing (depending on whether the person who created the .asp knew where the database will be located) – **DbPath** and **dbName**, as shown below:

Open the analysis .asp in Notepad. Located the following code:

```
'*****  
'*           *  
'* THE FOLLOWING TWO LINES MAY NEED TO BE CHANGED,      *  
'* DEPENDING ON THE LOCATION OF THE FILE/DATABASE      *  
    DbPath ="C:\INETPUB\SCRIPTS\"      ' *  
    dbName ="Employee Survey.MDB"      ' *  
'*           *  
'*****
```

For **Survey View Enterprise**, the DbPath contains the path to the database, and dbName indicates the name of the database.

For **Survey View Enterprise ODBC**, the dbName is the ODBC-DSN name, and the DbPath will contain the Username and the Password (in the format "UID=uid;PWD=pwd;").

Migrating the Access database to SQL Server or Oracle

If you want to use a database other than the default Access, SurveyView also supports SQL Server or Oracle.

Using a SQL Server or Oracle database with SurveyView Admin

The process for working with a SQL Server or Oracle database is as follows:

1. Create the questionnaire as usual in Access
2. **After** the questionnaire design is complete, migrate the Access database to SQL Server or Oracle.
3. Create a System DSN for the new database
4. In SurveyView Admin, click on File | Open ODBC-DSN and specify the DSN and the userid/password in the following format: "UID=uid;PWD=pwd;"
5. Now you can enter data and analyze as usual.

Using a SQL Server or Oracle database from a Web Survey .asp and/or an Analysis .asp

* Note: To collect data into a SQL Server or Oracle database from a Web Survey .asp, a SurveyView Enterprise ODBC license is required.

The process for working with a SQL Server or Oracle database using Web-based responses is as follows:

1. Create the questionnaire as usual in Access
2. **After** the questionnaire design is complete, migrate the Access database to SQL Server or Oracle.
3. Create a System DSN for the new database
4. When creating the Web Survey .asp and the analysis .asp, specify the DSN and the userid/password in the following format: "UID=uid;PWD=pwd;"
5. You can now analyze either on the Web or using Admin (using the Open ODBC-DSN option on the File menu).

Cont.

Migrating the Access database

There are several ways of migrating the Access database. The easiest is to actually **Import** the Access database from within Oracle or SQL Server. You only need to import the data tables, **not** the stored procedures. The basic process is to create an empty database within Oracle or SQL Server, give it name, and import the Access database.

Troubleshooting

WEB SURVEY PROBLEMS

PROBLEM: I get an error when I submit my survey page.

PROBABLE CAUSE 1: Are your Web Permissions and/or NTFS permissions may not be configured properly? See pages 10-11 for more information.

PROBABLE CAUSE 2: Is your database in the location you specified when creating the survey .asp? See page 14 how to check the survey .asp configuration settings.

PROBLEM: I can't get the graphs to work on the Web Analysis page —all I see is a red X.

PROBABLE CAUSE 1: There may have been a problem with the graph-engine component registration during installation. To register these components manually, locate the file called Chart_REregister.bat in the SurveyViewEnterprise folder and double click on it. You will see two windows with OK buttons pop up—click on the OK buttons.

PROBABLE CAUSE 2: Did you place the CreateChart.asp file in the folder where you placed your survey .asp? See page 9 for more information.

Troubleshooting

SURVEYVIEW ADMIN PROBLEMS

PROBLEM: I get runtime error 429

CAUSE : There was a problem registering runtime files during installation. Go to the SurveyView folder and locate a file called Survey-View_Reregister.bat (if you can't find it, make sure you have set the Folder Options/View to Show hidden files and folders). Double-click on the file, click on the 4 OK buttons, and close the DOS window.

PROBLEM: I'm getting a runtime error 35206 "Key not unique in collection"

PROBABLE CAUSE 1: SurveyView was not installed in the default directory (c:\Program Files\SurveyView) - this is known issue. Some users have experienced this problem if installing in for example d:\

PROBABLE CAUSE 2: You do not have sufficient user rights to create a database in the directory you are trying to use (i.e. the c:\Program Files\surveyview directory). This can occur if for example a Systems Administrator installed it for you, and you then logged on as a restricted user. This can be worked around by saving the database to the desktop (the desktop always "belongs" to the logged in user).

PROBABLE CAUSE 3: For Windows 95, 98 and NT users: the MDAC 2.5 installation may not have been completed properly (see page 4). You can install MDAC 2.5 manually like this:

1. You have to be logged in as an "administrator"
2. Download MDAC 2.5 Service Pack 2 from the Microsoft website.
http://www.microsoft.com/data/download_25SP2.htm
3. The file is called mdac_typ.exe - save it to your desktop
4. After downloading, double-click on mdac_typ.exe - this will install MDAC 2.5
5. Restart your computer
6. Go into the c:\Program Files\surveyview directory. Find a file called surveyview_REregister.bat. Double click on it. You will see 4 windows pop up - just click on the OK buttons. This process re-registers the runtime components.

Contact Information

Technical Support:

Send a support-related question to support@surveyview.com. Support emails are normally answered within 1 business day.

Contact Research Systems:

Research Systems, Inc.
625 W. Main Street
Ville Platte, LA 70586
USA
Phone: 1-888-789-0429
Fax: 1-800-720-1317
Email: usinfo@surveyview.com

Research Systems AB
Stationsgatan 10
54131 Skövde
SWEDEN
Phone: +46-500-410705
Fax: +46-500-428390
Email: info@surveyview.com