Alkacon Software GmbH

Technote

Alkacon OAMP Survey Module

Version: 2.0

Date: Wednesday, July 27, 2011

1   Table of Content

2   Abstract

This document describes the installation, configuration and usage of the Alkacon OpenCms Add-On Module Package Survey. With the Survey module, it is possible to create and analyze a survey.

Based on the Webform Module, it is possible to create highly configurable survey forms without knowledge of HTML. Once created, configured and published, a survey can be filled out by website visitors. The analysis of the survey can easily be done by creating a survey report.

3   General purpose of the Alkacon OAMP Survey Module

The module extends a basic OpenCms installation with the capability to analyze the answers of online input forms. It provides the following features:

- The survey is identical to the web forms of the OAMP Webform Module, only the view is different.

- Every answer, which is filled out from the user in a survey, is taken for the analysis.

- An overview page shows the analysis of all given answers to a survey.

- It is also possible to show every given answer of a user in a detail page.

4   Installation

Note: To use the Alkacon OAMP Survey module, you need at least OpenCms version 8.0.1. The module is not compatible with older OpenCms versions. To use the Alkacon OAMP Survey Module on OpenCms version 7.5 please download Alkacon OAMP Survey Module version 1.0.3, available at alkacon.com.

Note: The Alkacon OAMP Webform module with the version 2.0 or greater is needed.

Note: To use the Alkacon OAMP Survey module in a cluster scenario with replication it is recommended to use at least the Alkacon OAMP Webform module with the version 2.0.

Step by step installation procedure:

1. Go to the OpenCms Administration view

2. Click "Module Management" and select either "Import Module from Server" if the module was placed in the **WEB-INF/packages/modules/** folder of your OpenCms installation, or select "Import Module with HTTP" to upload the module from your local file system

3. Select the Alkacon OAMP Survey module zip file **com.alkacon.opencms.survey_2.x.zip** to import

4. Check if the jar file **com.alkacon.opencms.survey.jar** has been deployed in the **WEB-INF/lib/** folder after installation

5. Restart your servlet container afterwards

5   Module usage

After successful installation of the Survey module, it is ready to use. Surveys can be created by Drag & Drop from the ADE toolbar.

5.1   Creating an Alkacon Survey

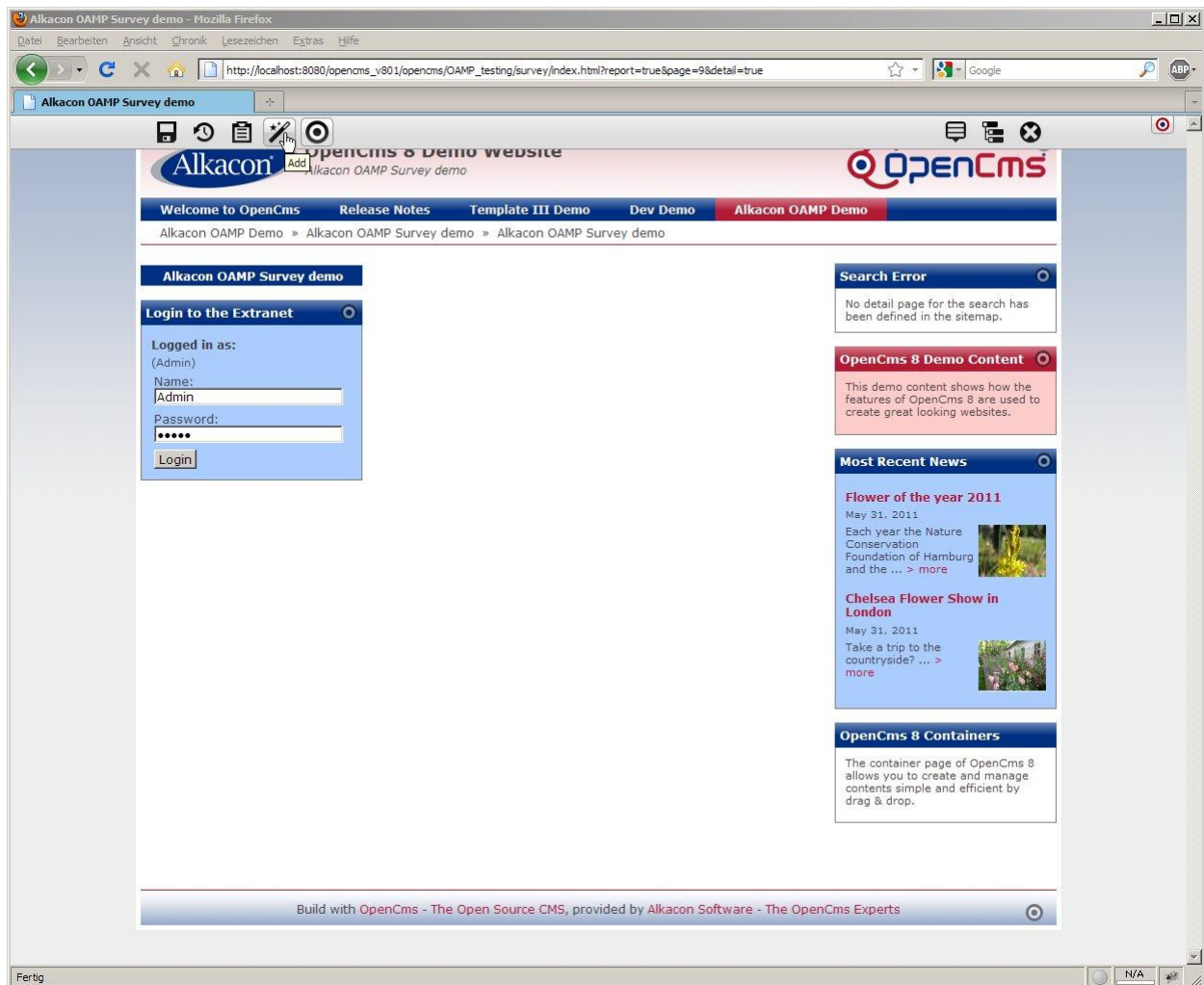To add a new Survey to an existing page, click on the "Add Wizard" symbol in the ADE toolbar.

Figure 1: Open the "Add Wizard" in the ADE toolbar.

By default the new resource type Alkacon Survey is available through the entire site and can be added to pages by Drag & Drop. Just click on the "Move to page" icon and keep the mouse-button pressed. Now you can drag the new Survey where you need it and drop it by releasing the mouse-button.
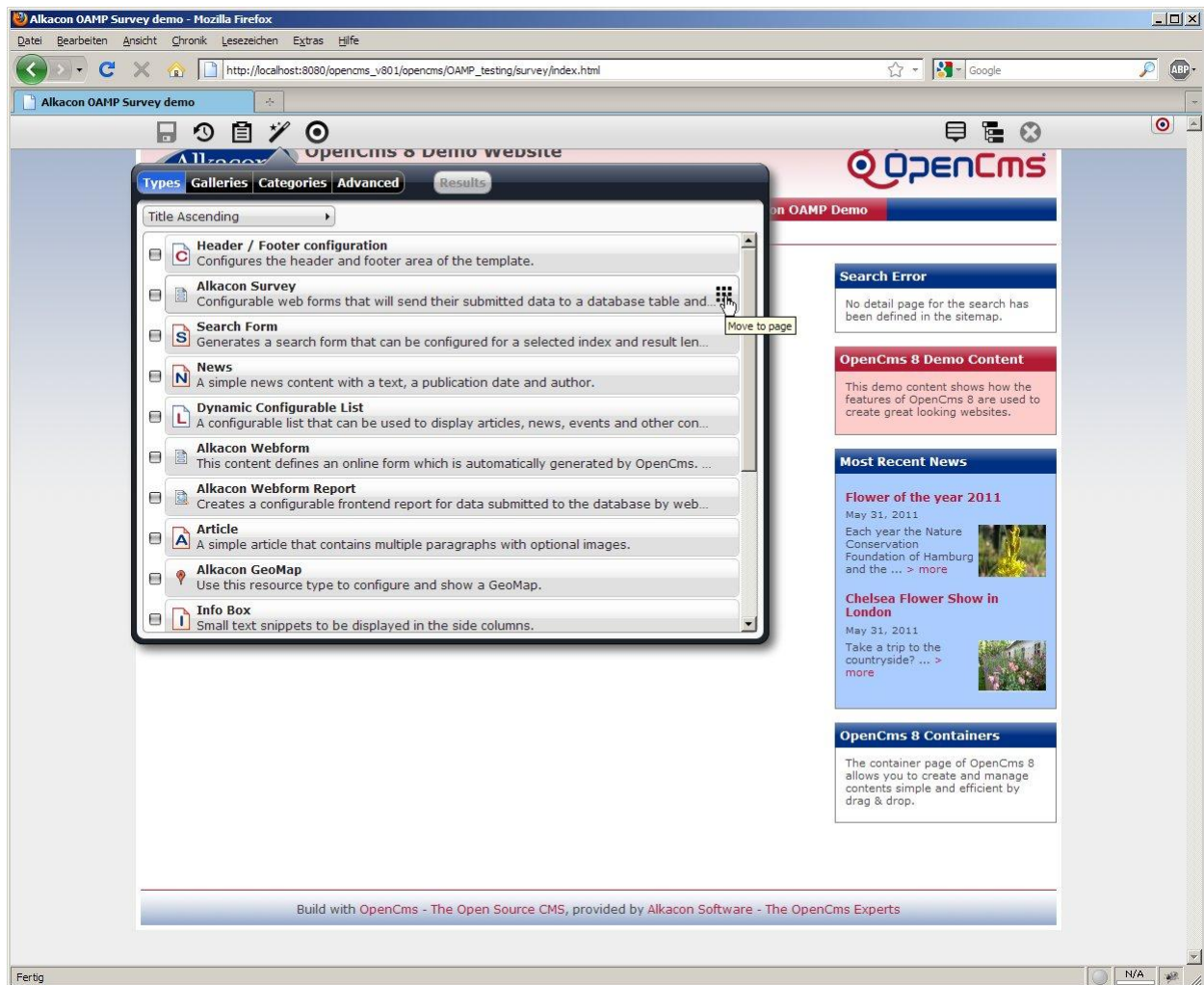
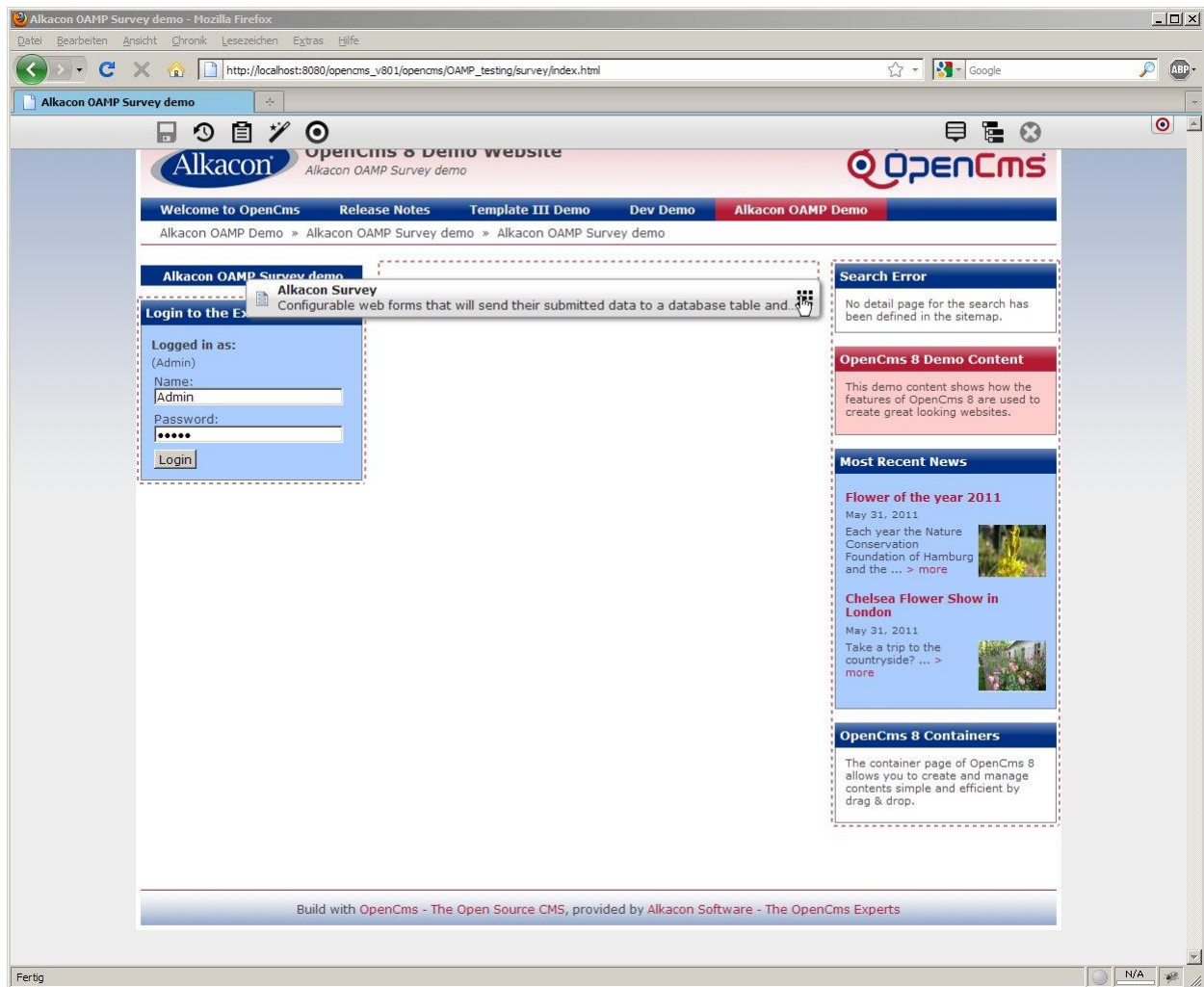**Figure 2: Drag a new Alkacon Survey from the "Add Wizard".**

Figure 3: Dropping the new Alkacon Survey to destination container.

5.2 Adding an existing Alkacon Survey to your page

You can also select an existing Alkacon Survey from the "Add Wizard" by double-clicking the Resource type Alkacon Survey or by checking the box left to it and clicking "Results". From the displayed results, select the Survey you need and add it to your page by Drag & Drop.
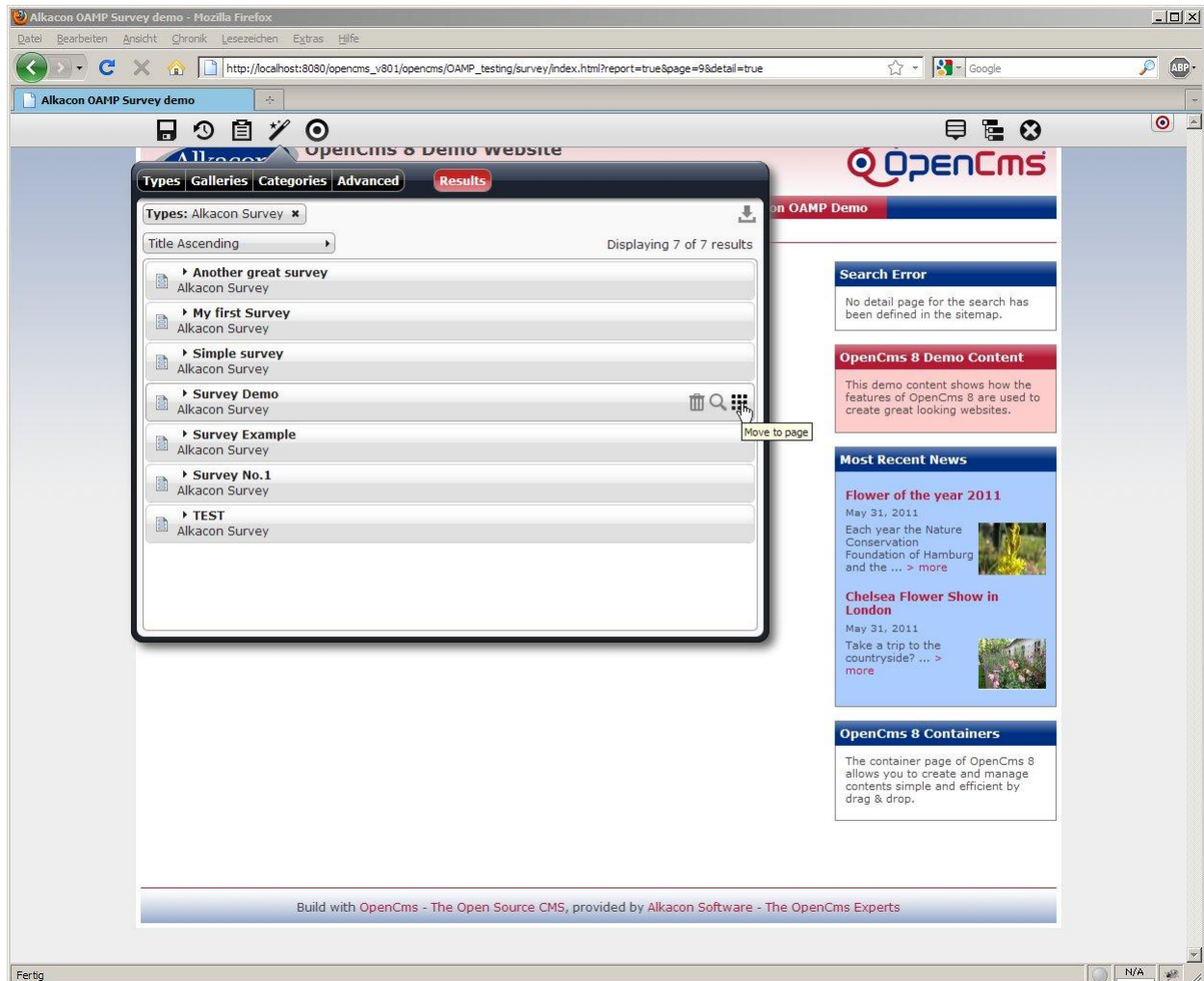

Figure 4: Drag & Drop of an existing Alkacon Survey in ADE.

5.3 Editing an Alkacon OpenCms Survey

To edit the newly created Alkacon Webform click on the ADE icon in the upper right corner of the Webform and select "Edit".
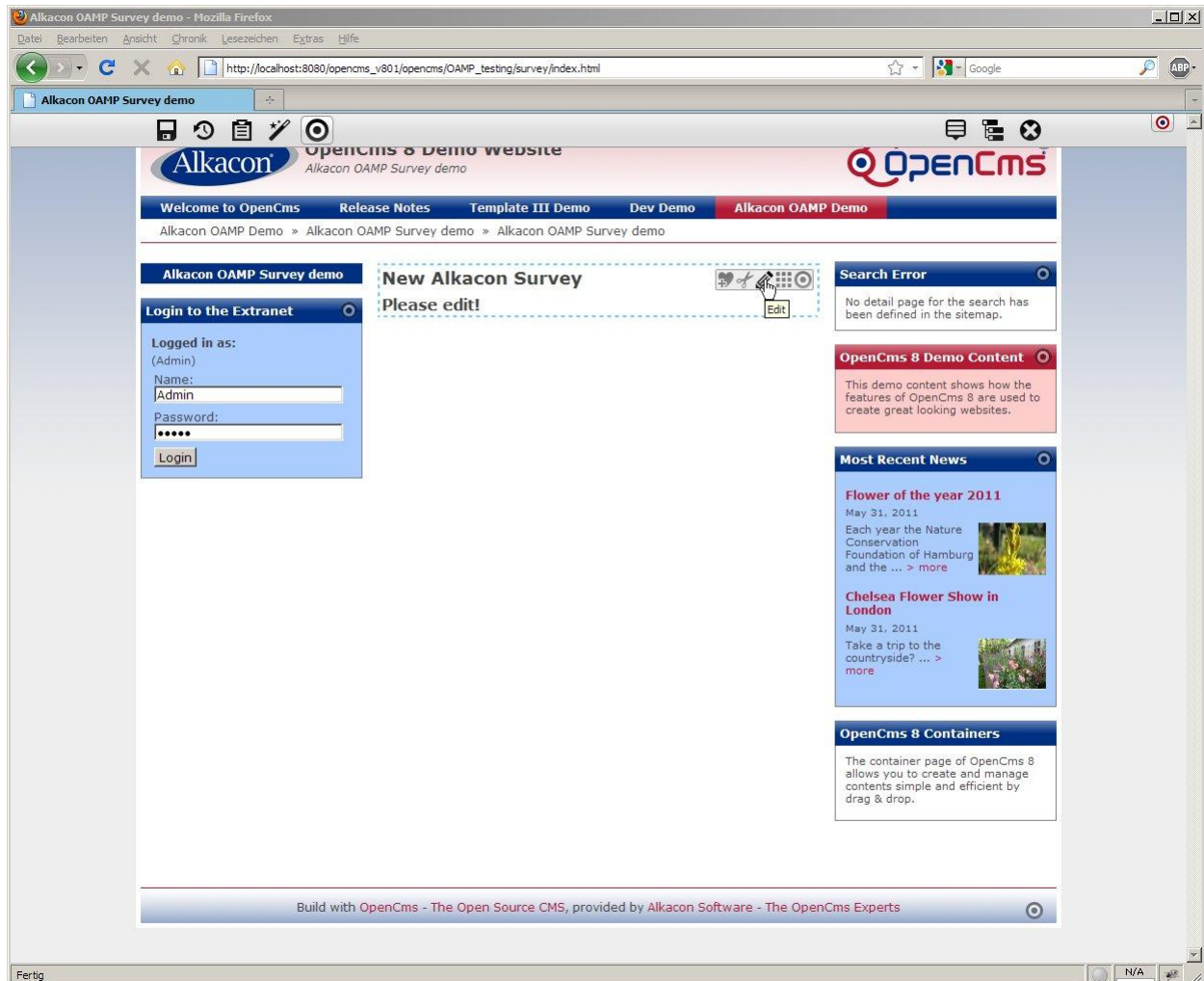
Figure 5: Open the ADE Editor.

5.3.1   Tab "Survey form"

In this chapter is described the tabulator "Survey form" in the survey.

The survey is identical to a webform of the OAMP Webform Module, only the view is different. For more information of editing a webform please have a look on the Document "Alkacon_OAMP_Webform.pdf" of the OAMP Webform Module.

In the Alkacon OAMP Webform Module following two new options currently can only be used in the Alkacon OAMP Survey Module. And that is why these two options are additionally described here:

- o **Form field:**

    - o **Parameters:** This field can be used to configure the average bar for the numerical values. Usage in the format key=value|key=value ...:

- showAverage: If the average of numerical values shall be shown, this key is to set to true

- averageDigits: The number of internal decimal places for the average

- averageText: The text on the average bar

- orientation: Per default the average bar is longer all the more average of the numerical values. This key is set to "desc", when the average bar shall be longer all the less average of the numerical values.

  o **Expiry date**: This field is currently only used in the Alkacon OAMP Survey Module. There this field is the date/time when the survey should expire.

To generate the survey report, it is required that the data target must be set to "database".

Only following three types are supported through the Alkacon OpenCms Survey Report:

- Checkbox,

- Radio buttons,

- Select box.

In special cases the building of the new view of the survey has to be set up with different HTML-Tags. In this case you can set the property "`webformMessage`" on the resource with the path of the new properties-file.

For the label you can provide the text which will be shown as the label in the web form. If you want to specify a different name to be stored in the database, the label should be followed by a pipe symbol ("|") and the name of the field in the database. This should be done if you have the survey in different languages and the labels differ in each language.

The default value of every field can be used to specify the single entries separated by the pipe symbol ("|").
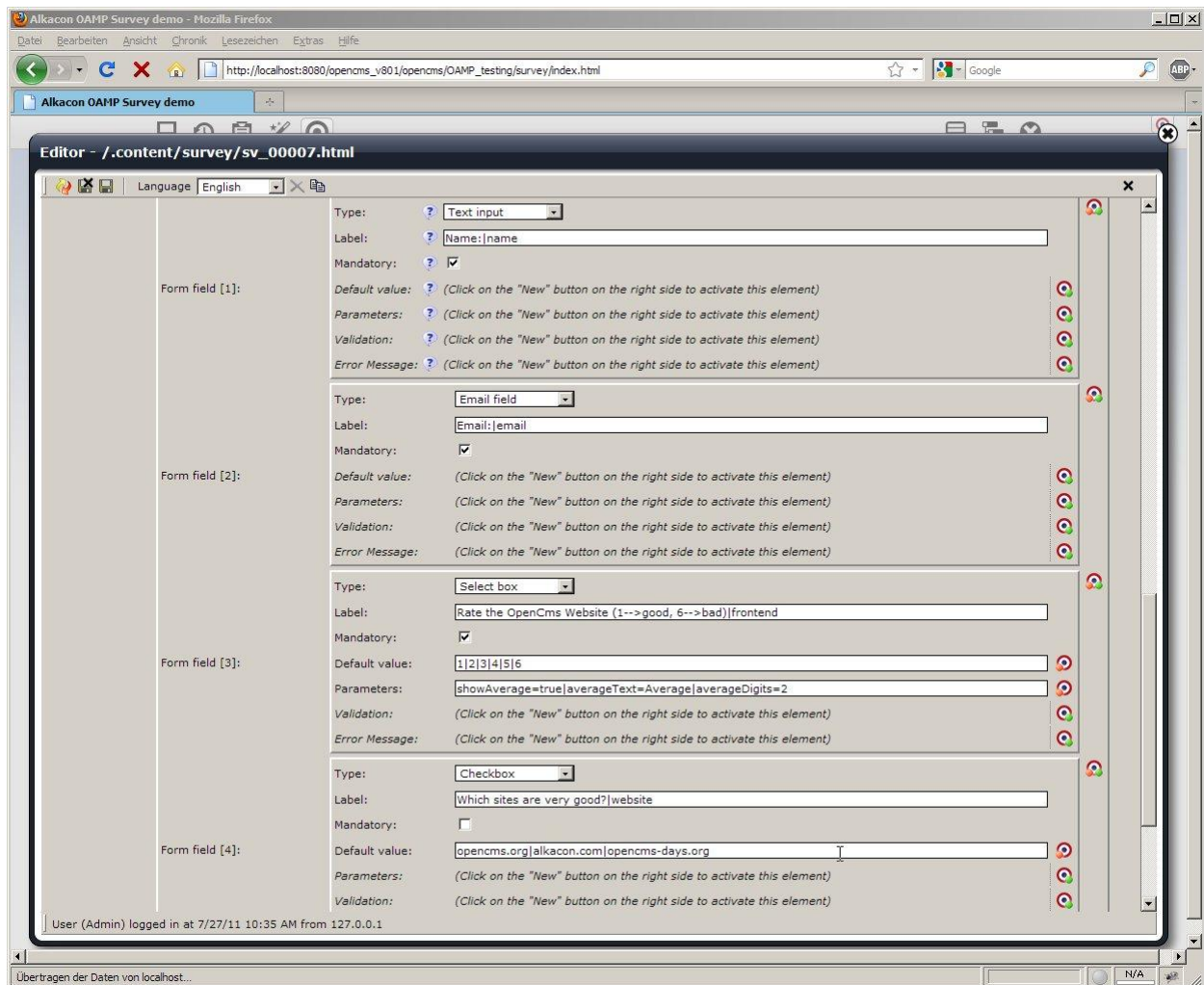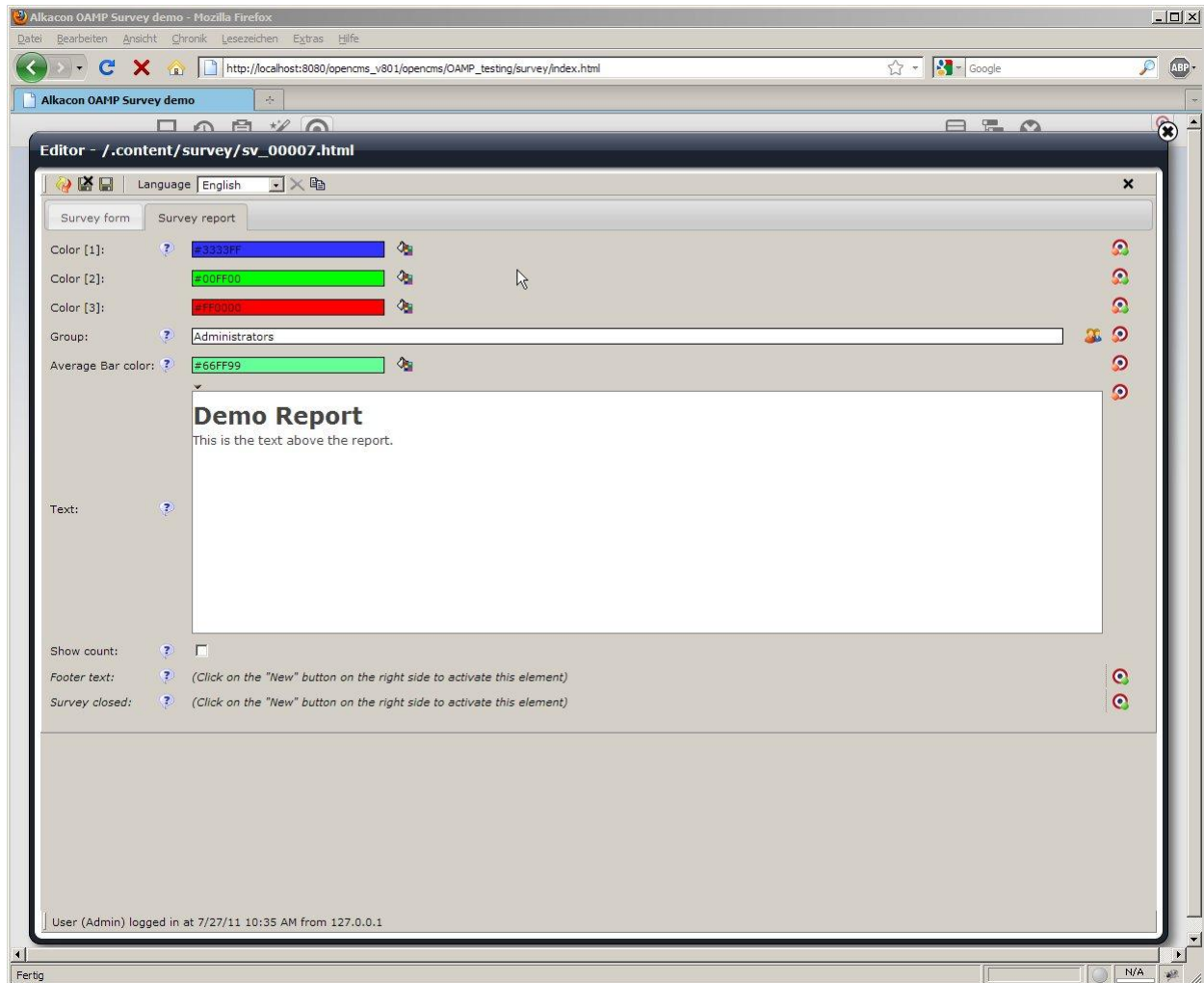
Figure 6: Editing an Alkacon OAMP Survey in ADE.

Please note that you have to insert a "Check page text" under the section "Advanced configuration". This is needed for showing a text if the user already has submitted the form.

5.3.2   Tab "Survey report"

In this chapter is described the tabulator "Survey report" in the survey.

Figure 7: ADE Editor view of a Survey Report.

The following fields are available:

- **Color**: Here you can set up the colors for the bars in the overview page of the Survey Report. For every bar a new color is taken.

- **Group**: This field is optional; if it is set then only users in this group can see the detail pages.

- **Average Bar Color**: The color for the average bar

- **Text**: An optional text which is shown above the overview page.

- **Show count**: If selected the numbers of the voted answers are shown, if not selected the counts are not shown.

- **Footer text**: The text displayed under the report.

- **Survey closed**: The text that is displayed on top of the report when the survey is closed.

Please note that the OpenCms Alkacon Webform or Alkacon Survey must set the transport of the datatarget to „database".

6   Additional configuration

6.1   Changing folder and name pattern

6.1.1   Module configuration

By default a new Alkacon Survey is generated and saved automatically in a dedicated folder. This folder is created automatically in the central `.content` folder of your site (e.g. `/sites/default/.content`). All new generated Alkacon Surveys are named and numbered automatically as defined in the Module configuration file (e.g. `/system/modules/com.alkacon.opencms.survey/.config`)

6.1.2   Sitemap configuration

To override this default mechanism, you can edit the Sitemap configuration (e.g. `/sites/default/.content/.config`) and add/modify the Resource type "alkacon-survey" and select a different folder or name pattern under the tab "Resource Types".
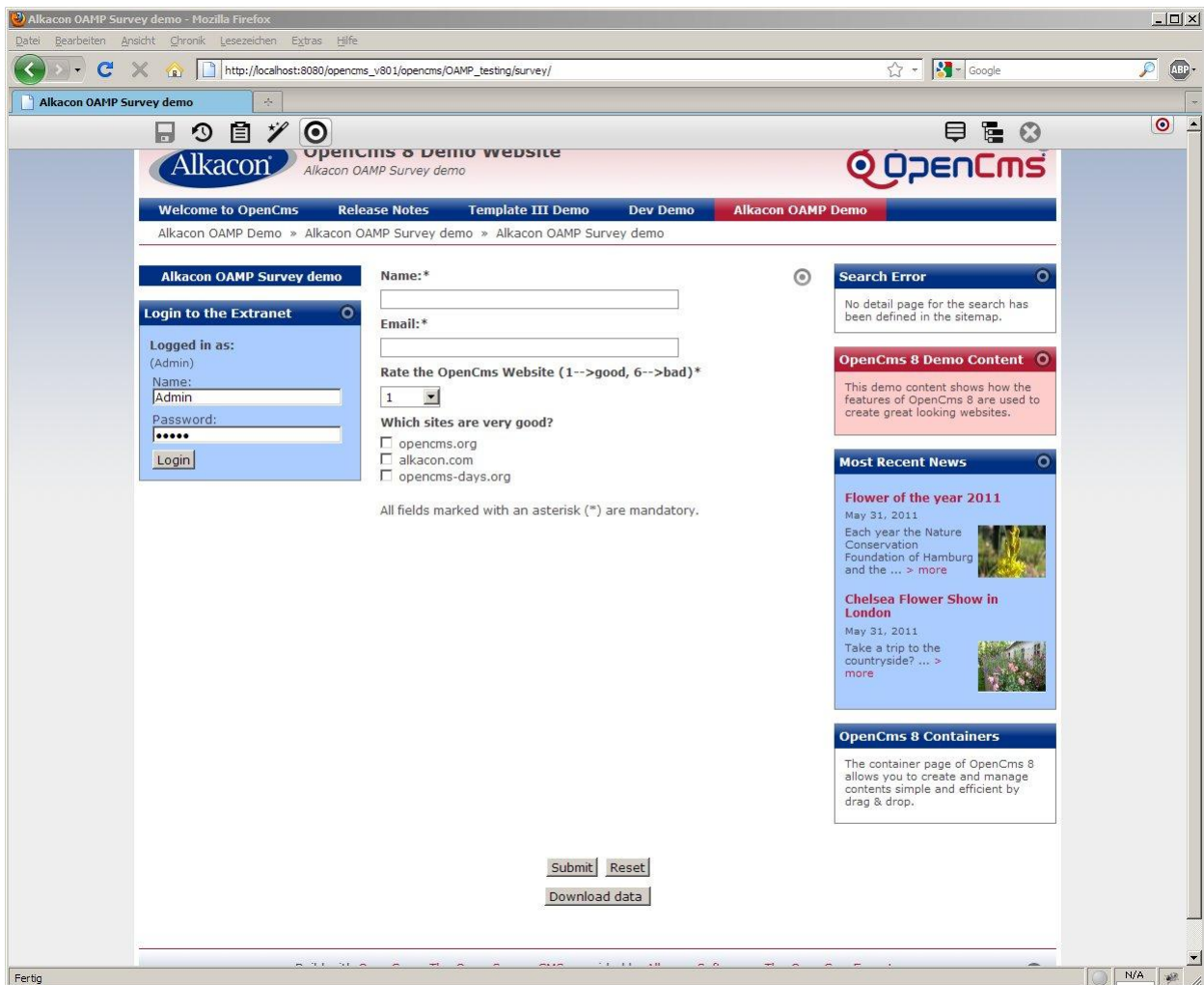
For further information see also:

http://www.opencms-wiki.org/Configuration_of_OpenCms_Sitemap_Properties

6.2   Additional configuration for the front end view

The survey and the report get automatically shown with the correct styles. If you want to make use of a custom CSS, please use the `<headinclude>` tag in `/schemas/survey.xsd`. Thus your CSS will get automatically linked in your template.

7 The survey front end view

Figure 8: the view of the survey.

8 The report front end view

To access the survey report the parameter report=true has to be passed in the query.

```
http://<yourHost>/<pathToPageWithSurvey>?report=true
```

Two views are available: the overview page and the detail page. The overview page takes the results from the database and calculates how much an answer is selected. Please notice that only following field types can be taken:

- Checkbox
- Radio buttons
- Select box

In the overview page it is possible to have an additional average bar for the numerical values (see chapter 1.1).
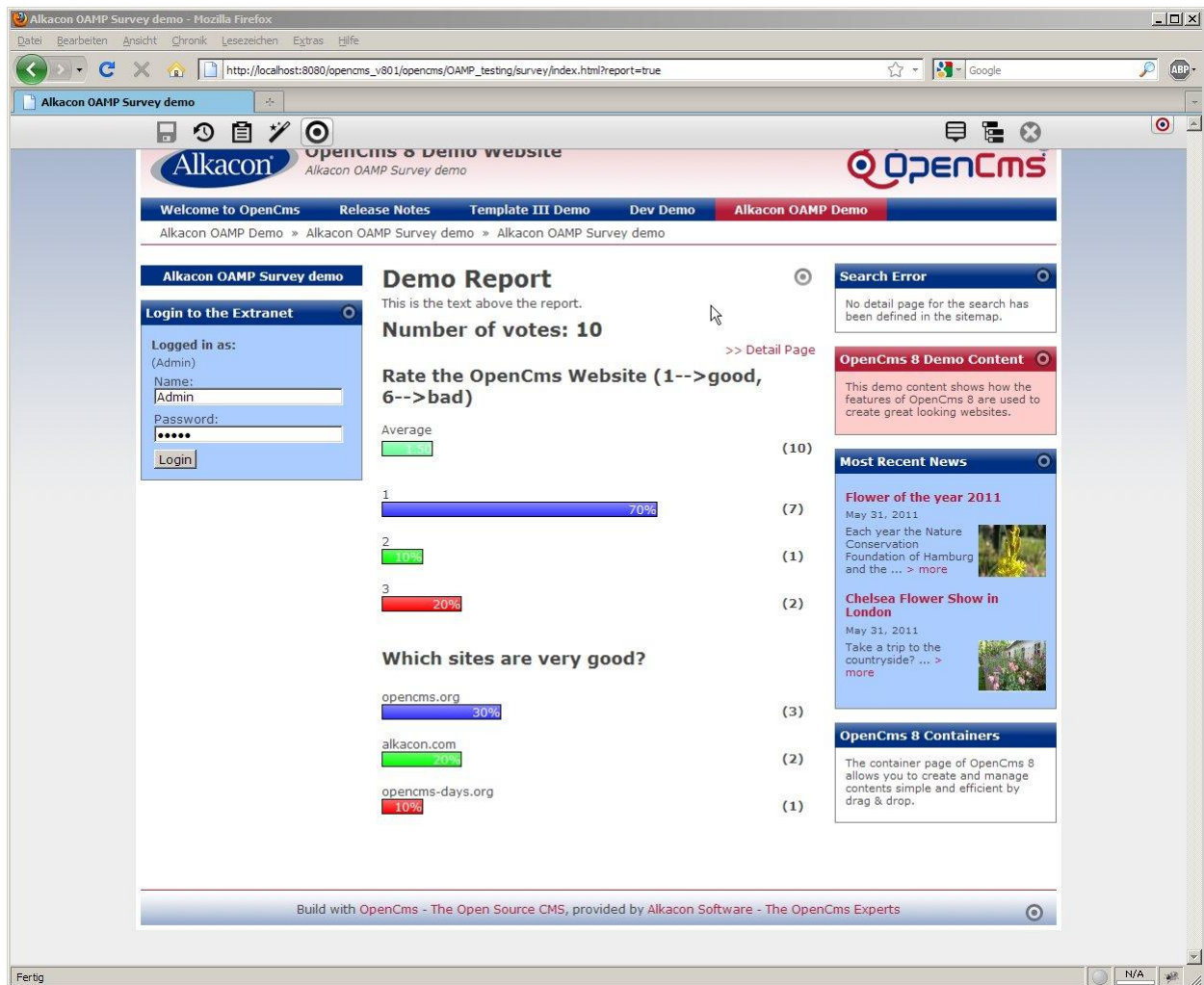
Figure 9: Example for an overview page.

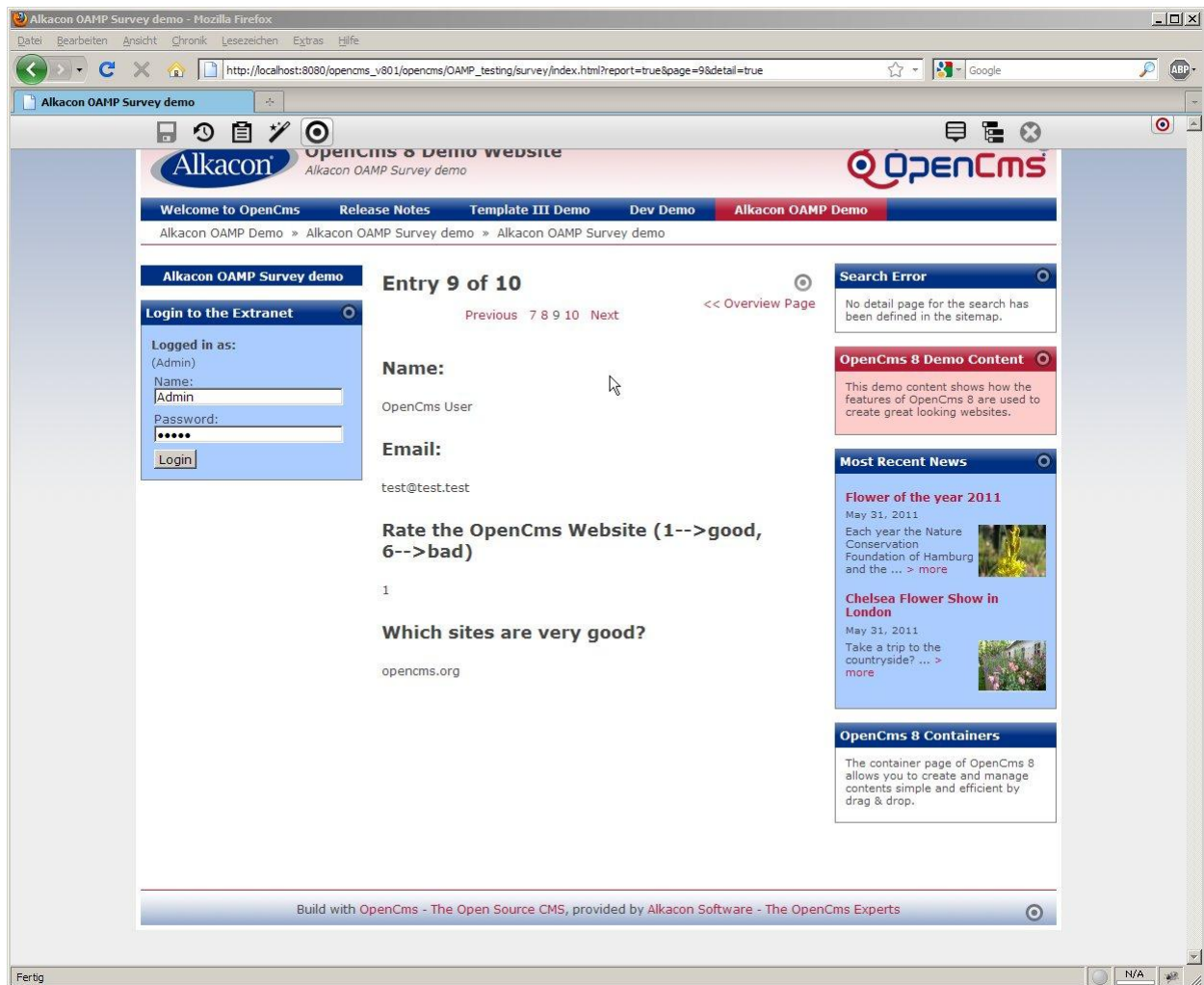The detail page shows every filled out survey from a user. Here every field is shown.

Figure 10: Example for the detail page.