Survana Manual v.1.0

Getting Started

Survana has a few easy ways to quickly get started, each one appealing to a different use case.

- **Standalone Packages** are pre-compiled binaries for your system. All dependencies are bundled into a single package.
- **Virtual Machines** are a convenient way to run Survana on virtual software such as Vagrant, Docker or VirtualBox.

Download Survana
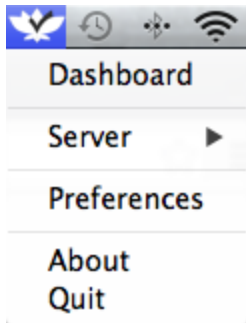
Installing Survana

- **Standalone Packages:** simply extract the package into a folder on your system.
- **Virtual Machine:** open the VM image using Vagrant, Docker or VirtualBox.

Running the Web Service

- **Standalone Packages:**
  - **Mac OS X, Windows:** launch the application
  - **Linux:** run the `bin/server` binary from the shell
- **Virtual Machine:** Survana starts automatically as a background system service when the VM boots up.
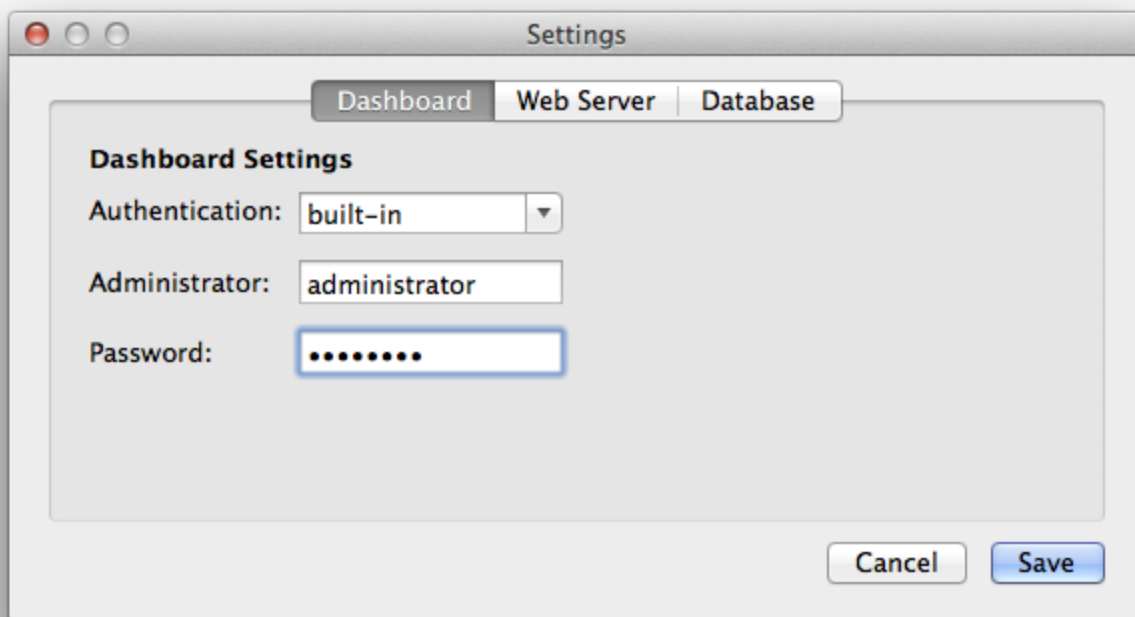
Configuration

- **Mac OS X, Windows:** open *Preferences*

- **Linux:** edit bin/config.json

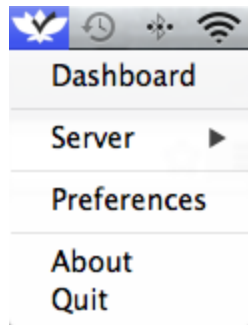For security reasons, you must set an administrator username and password, as shown below:

After a configuration change, restart the web service for the new changes to take effect.
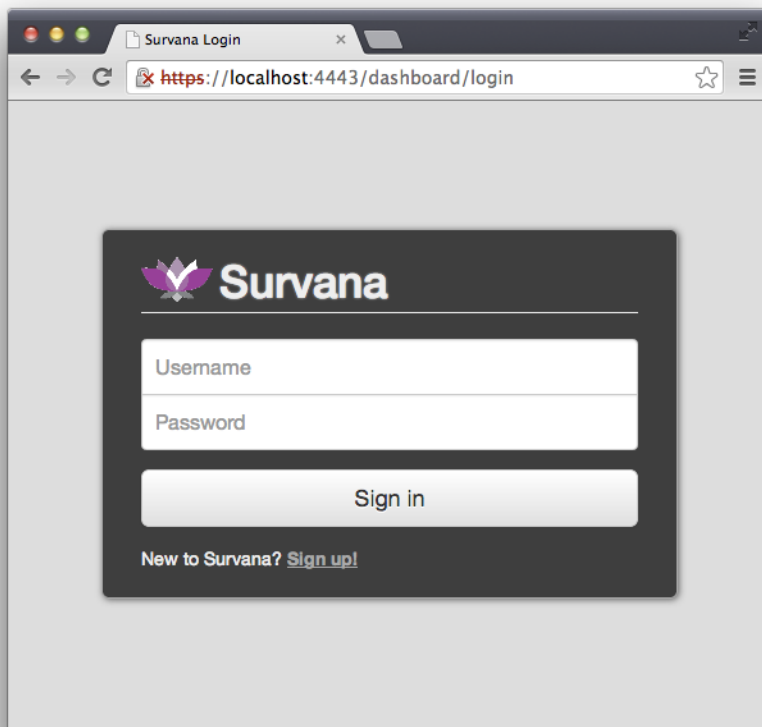
Dashboard

To access Survana's dashboard:

- **Standalone Packages:**
  - **Mac, Windows:** select *Dashboard*

  - **Linux:** navigate to https://localhost:4443/dashboard/ in a modern browser.
- **Virtual Machine:** locate the VM's address and navigate https://<VM IP>:4443/dashboard/ in a modern browser.
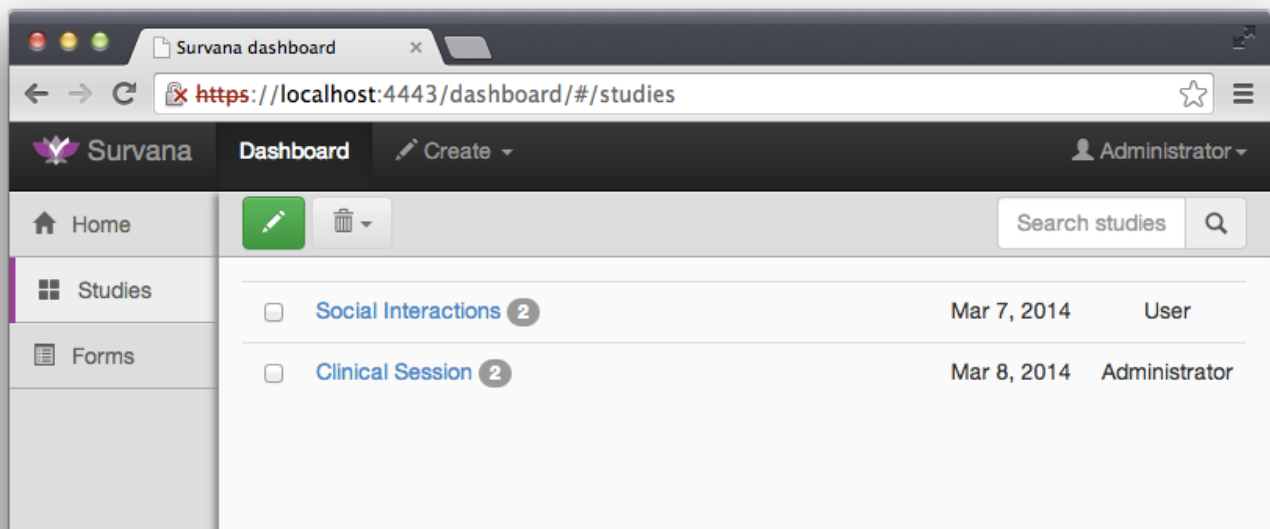
Sign in:

Enter your administrator username and password and click on "Sign in" to continue.
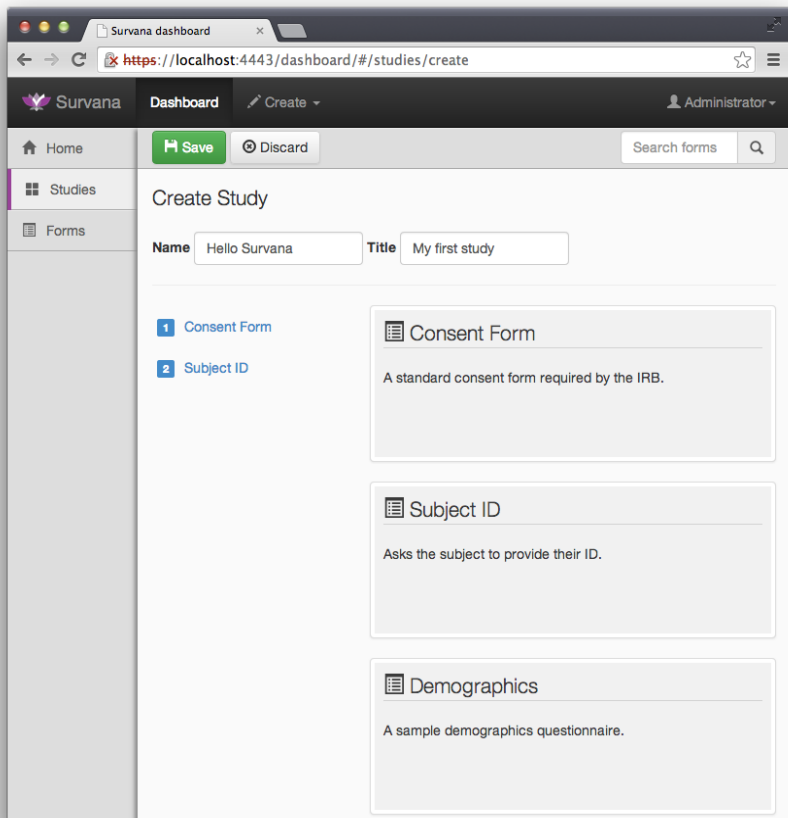
Create study:

To quickly add a new study, click the green button on the *Studies* page:
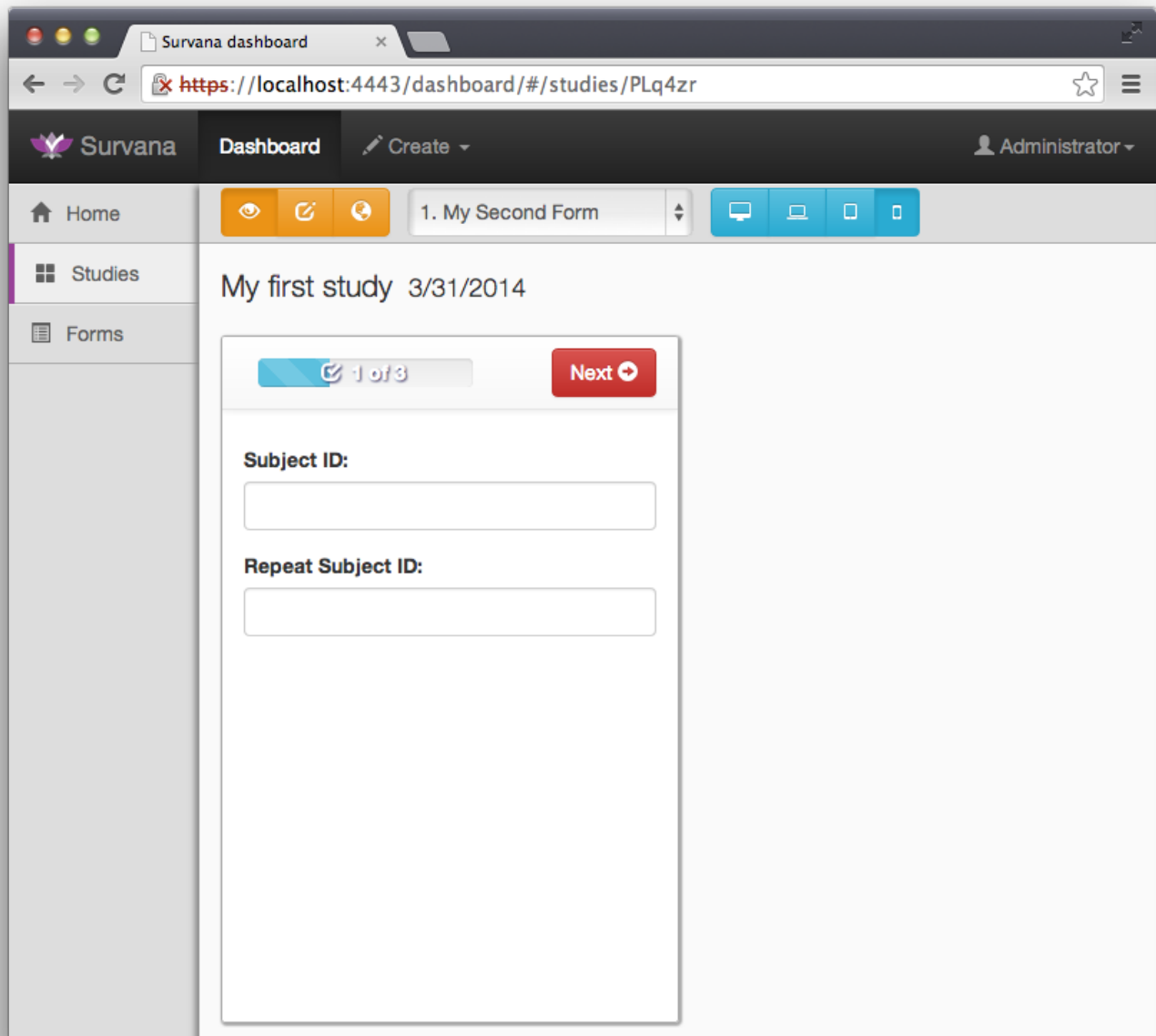

Choose any of the available forms on the right and click the *Save* button when finished.

Preview study:

Survana lets you preview the study as it appears to the subject.

All available actions are displayed as yellow buttons on the toolbar:

- **Preview** the study
- **Edit** study to add or remove questionnaires.
- **Publish** and share the study using its public URL.

Use these buttons to visualize how your study will look on a variety of device formats:
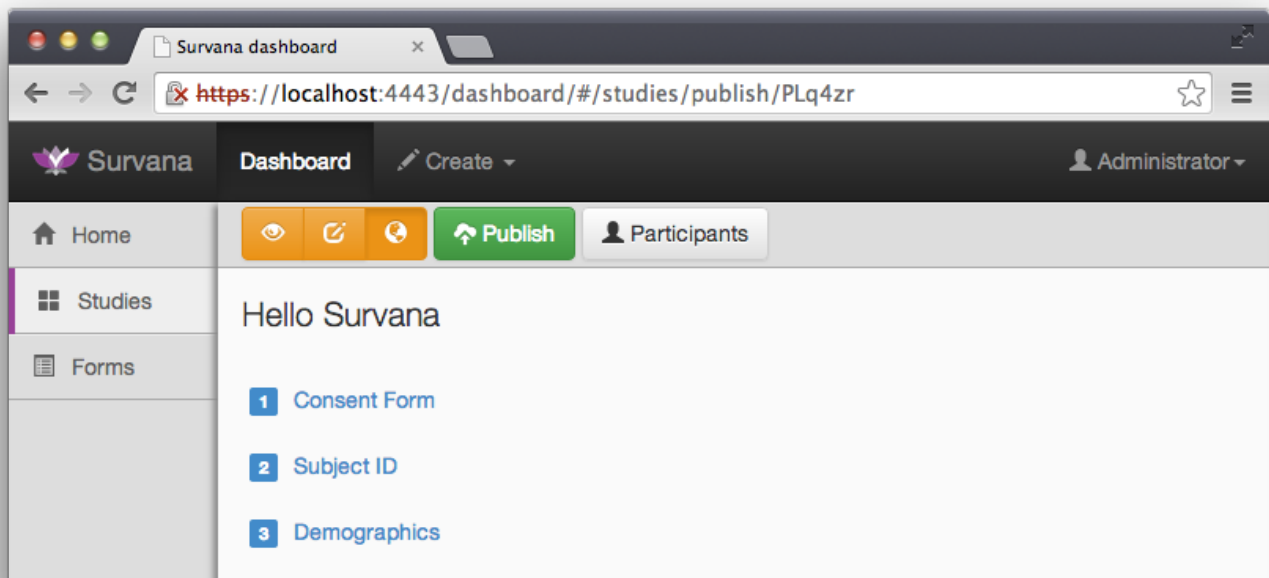
- Desktop / Large displays
- Laptop/Netbook / Medium displays
- Tablet / Small displays
- Phone / Extra small displays

Edit study:

To bring up the edit screen for your study, click on Edit. You can add or remove forms, just as you did on the Create study page.

Publish study:

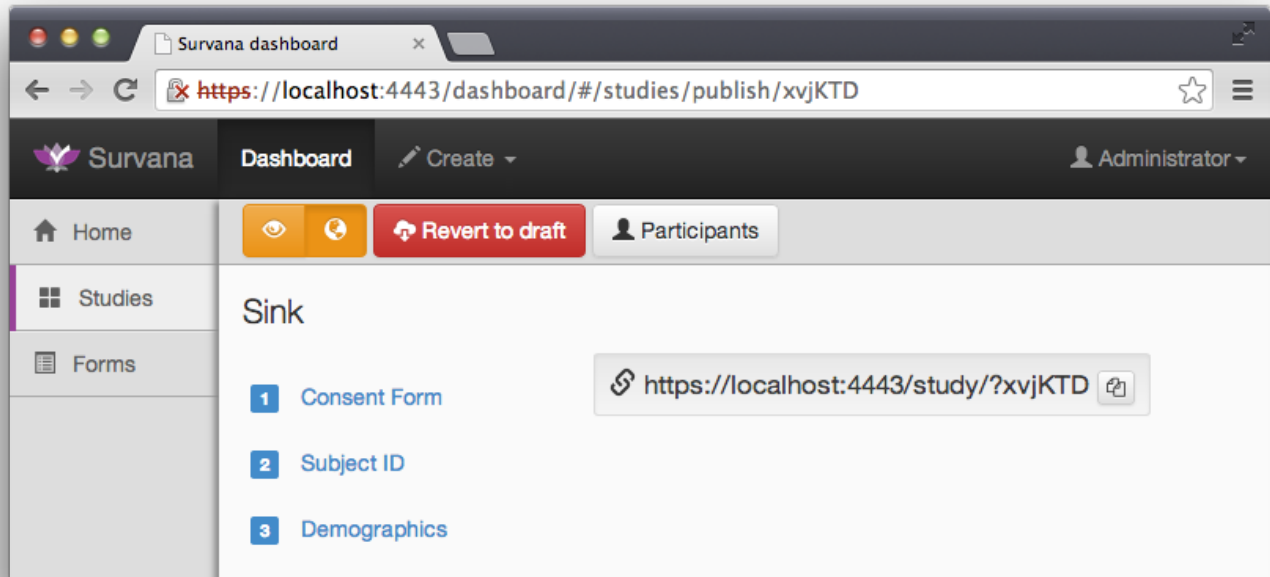When the study is ready for distribution, click on to bring the publication screen.

You will notice two new buttons:

- **Publish** creates a public URL for your study.
- **Participants** lets you restrict access to the study using participant IDs.

Study link:

After publishing your study, the page will display the public URL to your study, which you can share with your participants.

To make changes to your study after you've published it, click **Revert to draft**.

Note that your study will be inaccessible during the time its not published.