



Installation Guide for DNN® Module: SurveyBox v. 1.2

Survey™ Project Technical Documentation

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Version: 2.0
Date: 2017-06-18

Content

I. Introduction.....	3
II. Releases & Versions.....	4
III. Installation & Adjustments.....	5
A. Basics.....	5
B. New SurveyBox Installation.....	5
C. Upgrade, Reinstall or Repair.....	8
IV. Using the SurveyBox Module.....	10
A. Creating Surveys.....	10
B. SurveyBox Module.....	10
C. Settings.....	10
D. Present Surveys.....	11
E. Save DNN Userinfo to SP.....	11
F. SurveyBox Module Settings Information.....	12
G. Survey Layout and Custom CSS.....	12
V. Limitations.....	14
VI. Further Reading & Links.....	15

I. Introduction

This installation guide applies to the implementation and use of the SurveyBox v.1.2 DNN® Module for the DotNetNuke® CMS v. 9.* and Survey™ Project v. 2.4 webapplication.

The SurveyBox DNN module is developed by W3DevPro™. It offers easy integration of the Survey™ Project's front end features into the DotNetNuke® CMS to present surveys, webforms and questionnaires to DNN users, respondents and voters.

To make full use of the SurveyBox Module both a Survey™ Project (v. 2.4)¹ and a DotNetNuke® (v.9.*)² installation are needed:

- a. The SP™ v. 2.4 installation is used to create and administer surveys, reporting etc.
- b. The DNN® installation is used to publish the surveys and to create the interface to present the survey/webform through which respondents will be able to answer questions, vote, submit etcetera.

The SurveyBox Module installation can be executed through the default Extensions Wizard of the DNN® CMS.

1 SurveyBox v1.2 is compatible and tested with the SP v2.4

2 SurveyBox v1.2 is compatible and tested with DNN v. 9.0

II. Releases & Versions

The SurveyBox v. 1.2.0.0 is the third release of the Survey Project DNN module.

The SurveyBox DNN module is designed to make surveys and webforms created through Survey™ Project accessible in an easy way through the DNN interface by making use of DNN's module structure.

New Features & Changes

a- options to present multiple surveys in a dropdownlist (DDL) through one instance of the SurveyBox module based on a combination of (DNN) access rights and the SP user accounts.

b- option to get DNN userinfo through sessionvariables and collect and save them through the SP survey;

o Available DNN userinfo: portalid, userid, username, useremail;

o New session variable names:

* DnnPortalIDSessionValue

* DnnUserIdSessionValue

* DnnUserNameSessionValue

* DnnUserEmailSessionValue

As of the first versions our wish is this module will serve it's purpose and that the group of "front-runners" will share their feedback to help improve future versions.

Comments and feedback can be sent to: mail@surveyproject.org or use the Forums of the Survey™ Project Community site at <http://www.surveyproject.org>

III. Installation & Adjustments

A. Basics

Separate installations of both DNN® and Survey™ Project are necessary to be able to make use of the SurveyBox Module.

- Instructions on how to download and install DNN®:

- a. <http://www.dnnsoftware.com/community/download>
- b. <http://dotnetnuke.codeplex.com/> or <https://github.com/dnnsoftware/Dnn.Platform/releases>

- Instructions on how to download and install Survey™ Project:

- a. <http://www.surveypoint.org/>
- b. <https://www.github.com/surveypoint>

Once both webapplications are installed the implementation of the SurveyBox module can start.

B. New SurveyBox Installation

Two steps are needed to implement the SurveyBox Module:

- 1- add the SurveyBox module to the DNN installation;
- 2- edit the (N)Survey settings and the SP databaseconnection details of the DNN web.config file;

Note: it is strongly advised to create a backup of your DNN web.config file before starting the implementation.

Next follow the instructions below on 1. and 2.:

1- add the SurveyBox module to DNN

To add the SurveyBox DNN module follow the regular instructions to add and install a DNN module as a Host using the Settings/ Extensions Wizard.

Actions

- add the SurveyBox Module to DNN as a Host through the menu Settings/ Extension Wizard

Once installed the SurveyBox Module will be become available to add to DNN webpages from the list of DNN modules (Edit/ Modules/ Add Module).

Note: before adding a SurveyBox module to a webpage set the SP™ databaseconnection first. See the next step.

2- edit the DNN web.config file

Two changes have to be made to the DNN web.config file through the Settings/ Config Manager menu:

- a. Edit connection details to the SP™ database connection string to connect to the database of the Survey™ Project webapplication;
- b. Edit details of the "NsurveySettings" section where several SP™ settings are controlled (e.g. SMTP)

Actions

- log in as Host and go to Settings/ Config Manager;
- Select the web.config file from the list of Config files;
- Search the proper section/ position and fill out the details as described below;
- Add the correct SP™ database connection details: dbserver, dbname, username, password;

Alternative

- use FTP to access the web.config file directly on your webserver to edit and make the changes

- a. To set up the DB connection to the SP webapplication

Code Example:

```
<add name="SurveyProjectTestConnectionString" connectionString="Data Source=[your SP
DB server];Initial Catalog=[your SP database];Persist Security Info=True;User
ID=[yourdbusername];Password=[yourdbpassword]" providerName="System.Data.SqlClient" />
</connectionStrings>
.....
<dataConfiguration defaultDatabase="SurveyProjectTestConnectionString" />
```

Note: make sure the *name* of the *connectionString* to the SP database matches the name of the *defaultDatabase* in the dataConfiguration tag.

Actions

- Save the changes or continue with NsurveySettings and then save;

- b. NsurveySettings section (necessary for file paths/ smtp settings etc)

Note: the entire section has been added to the end of the web.config file just before the </configuration> closing tag

Code Example:

```
<nSurveySettings>
  <!-- Path where you copied the nsurvey images and XML language files -->
  <add key="NSurveyImagesPath" value="~/DesktopModules/SurveyBox/Images/" />
  <add key="NSurveyXmlDataPath" value="~/DesktopModules/SurveyBox/XmlData/" />
  <add key="NSurveyLanguagesPath" value="~/DesktopModules/SurveyBox/XmlData/Languages/" />
  <add key="NSurveyCssXmlPath" value="~/DesktopModules/SurveyBox/XmlData/Css/" />
  <add key="NSurveyAddressPath" value="~/DesktopModules/SurveyBox/XmlData/Address/" />

  <!-- SMTP Server used to send out the standard emails -->
  <add key="NSurveySMTPServer" value="....." />
  <add key="NSurveySMTPServerPort" value="....." />
  <add key="NSurveySMTPServerAuthUserName" value="....." />
  <add key="NSurveySMTPServerAuthPassword" value="....." />

  <!-- Enable Secure Socket Layer (SSL) connection to SMTP server: true/ false-->
  <add key="NSurveySMTPServerEnableSsl" value="false" />
  <add key="EmailingProviderAssembly" value="Votations.NSurvey.Emailing" />
  <add key="EmailingProviderClass" value="Votations.NSurvey.Emailing.SystemWebEmailing" />

  <!-- User provider determined through Userprovider assembly -->
  <add key="UserProviderAssembly" value="Votations.NSurvey.UserProvider" />
  <add key="UserProviderClass" value="Votations.NSurvey.UserProvider.FormUserProvider" />

  <!--
      You can run nsurvey in a single user mode
      and let the default FormUserProvider create
      a "dummy" admin user on the fly. If enabled user management
      and access right checking features will be disabled.
  -->
  <add key="FormUserProviderSingleMode" value="false" />

  <!-- Do we allow the use of database queries using Sql based answer types ? -->
  <add key="SqlBasedAnswerTypesAllowed" value="true" />

  <!-- Assembly and pages that use the assembly must be in the same virtual directory -->
  <add key="WebDAL" value="Votations.NSurvey.SQLServerDAL" />

  <!-- File upload answeritems settings -->
  <!-- How many hours can unvalidated uploaded files stay in the database -->
  <add key="UploadedFileDeleteTimeout" value="24" />

  <!--
      How many hours can uploaded files for sessions that has no
      yet been resumed stay in the database. Leave some time
      because user wont get notified if its session have been deleted
      when he resumes
  -->
  <add key="SessionUploadedFileDeleteTimeout" value="336" />
```

</nSurveySettings>
</configuration>

Note: instructions on how to use the NsurveySettings section can be found in the ReadMe.txt file of the Survey™ Project application.

Actions

- Edit the entries and save the changes
- Next start using the module → see section III. below.

C. Upgrade, De-install, Reinstall or Repair

Upgrade

If SurveyBox v. 1.1.0 is already installed in the DNN CMS it is possible to upgrade to the SurveyBox v. 1.2.0 module through the default DNN Extension Wizard.

Notes:

* The previous web.config file SurveyBox entries will be overwritten/ changed. After the upgrade the survey- and DB connection settings must be re-entered.

* The settings (surveyid) of the SurveyBox modules that are already added to the DNN pages no longer apply. The new settings (surveyid/ userid) must be applied. It is **not necessary** to delete or remove the modules before the upgrade.

Before running the upgrade **create a backup of the web.config file.**

Actions to Upgrade

- Log in as Host
- Select menu Settings/ Extensions
- Select Install Extension
- Upload the SurveyBox v.1.2 package Zip file
- Click the Next buttons to finalize the installation.
- Next edit the surveybox web.config file entries: see *New SurveyBox Installation*

Deinstall

To deinstall the SurveyBox module use the DNN Extensions Wizard

Actions to Deinstall

- Log in as Host
- Select menu Settings/ Extensions
- Go to the tab Installed Extensions
- Go to the SurveyBox Module entry
- Click the Delete Icon to remove the SurveyBox module
- Use the Wizard to Delete the module and check the 'Delete files' option

Delete Extensions - SurveyBox

< BACK TO EXTENSIONS

Extension Type ⓘ

Module ▼

Name ⓘ

SurveyBox

Friendly Name* ⓘ

SurveyBox

Description ⓘ

The SurveyBox DNN module enables easy integration of the Survey™ Project front end features into the DNN® CMS to present surveys, webforms and questionnaires to DNN users, respondents and voters.

Version ⓘ

00 ▼

00 ▼

00 ▼

Delete Files? ⓘ ☒

Cancel

Delete

Note: The Extensions delete button will remove the SurveyBox module from the DNN installation including all instances on the DNN pages. They cannot be recovered once the module is deleted.

Even if the Delete Files option is checked some of the SurveyBox files are not properly deleted by DNN. To completely remove all files delete the remaining SurveyBox folder (incl. Subfolders) manually from the directory: DeskTopModules\.....

Reinstall or Repair

If the initial installation of the SurveyBox module is corrupted or is no longer working correctly for some unknown reason it is possible to perform a reinstall or repair by repeating the Extension wizard installation proces. This can be done an unlimited number of times.

Note: After every reinstall or repair the web.config file settings are overwritten and must be

reset (DB connection etc.) *See the upgrade scenario.*

IV. Using the SurveyBox Module

A. Creating Surveys

- To start making use of the SurveyBox module on a DNN webpage a survey will have to be created first through the Survey™ Project webapplication.
- To create a survey follow the instructions of the SP™ tool.

B. SurveyBox Module

- Once a survey is created it can be published and presented through the SurveyBox module on any webpage of the DNN installation.
- Multiple modules per page can be published. Multiple surveys per module can be presented.
- To present any survey first add a SurveyBox module to the DNN webpage.

Note: When adding multiple SurveyBox modules to a page the warning 'A critical Error has Occured.' will appear. Once a surveyid is set and selected (Settings) for every module it will disappear.

C. Settings

To determine what surveys are presented through the module the following features are available:

- a. SurveyBox settings tab:
 - SP surveytitle and ID
 - SP username and ID
- b. Permissions tab
 - 'Show Drop Down List' permission

Single (default) survey

To present a single survey and/ or set a default survey for the module select a SurveyTitle from the dropdownlist and click the Update button. The ID of the survey is saved to the DNN database and is shown on the Settings screen. If no other options (see Multiple Surveys) are selected the (default) survey will be presented through the module.

Multiple surveys

To present a (dropdown) list of surveys to select from through the module select a UserName from the dropdownlist and click the Update button. The ID of the User is saved to the DNN database and is shown on the Settings screen.

Based on the SP UserID surveys are selected from the SP database that are assigned to the SP User through SP. Next the DLL is populated with these surveys.

Note: in case of selecting the SP admin account all surveys are added to the DDL.

To make the dropdownlist of surveys available to DNN users (e.g. All or Registered) the " Show Survey DDL " - permission has to be activated through the modules Permissions tab.

The permission can be set per role(s) or for one or more DNN users.

Note: module permissions can only be accessed if the page permissions are **not** inherited

Example

In SP a "special" user account could be created to assign a particular list of surveys for a particular group of DNN users to answer or participate in.

Steps

- Create SP user "Test" ,
- Create and assign the surveys named Test1, Test2, Test3 to SP useraccount Test
- Select the SP UserName "Test" in the SurveyBox module.

The DDL on the DNN page will contain surveys Test1, 2, 3

- To make the DDL visible to all Registered Users check the 'Show SurveyList' permission on the Permission settings tab.

Note: the dropdownlists on the Settingspage will show all surveys (active/ inactive) and users created through the SP™ tool

D. Present Surveys

- Once the Survey is set (default SurveyID) or selected (DDL) the surveydata (questions/ answers) are pulled from the SP™ database and presented on the DNN webpage;
- Any adjustments to the survey through the SP™ tool will be shown realtime on the DNN webpage as well.

Note: Instructions on how to administer the SurveyBox module settings are part of the Settings page ('Help on SurveyBox Settings' section) .

E. Save DNN Userinfo to SP

An option has been added to get the DNN userinfo through the use of sessionvariables and collect and submit and save them through the SP survey.

Available DNN userinfo:

- portalid
- userid
- username
- useremail;

New session variable names:

- * DnnPortalIdSessionValue
- * DnnUserIdSessionValue
- * DnnUserNameSessionValue
- * DnnUserEmailSessionValue

These sessionvariables can be used in SP for example to set the default answertext on any question;

Actions

- create question
- add answer
- select answertype (any option e.g. hidden, field basic etc.)
- set the default textvalue: @@DnnUserIdSessionValue@@;

Check the instructions at the bottom of the Edit Answer Settings page: @@yoursessionvariablename@@

Next once the survey is opened in DNN the DNN Userinfo will be captured and saved on submitting the survey along with the respondents answers.

Demo

- * Available at: <http://www.surveyproject.org/Samples/SurveyBoxDnnModuleTest/tabid/269/Default.aspx>
- * To try the options register at the site first and create a useraccount including username/ password/ email

Sample Survey

- * The import file 'SurveyBox12DnnUserInfo_Sample.xml' of the demo survey is added to the releasefiles.
- * It can be imported into SP™

F. SurveyBox Module Settings Information

Sessionvariables and SurveyBox modulesettings once set and as saved in the DNN database can be checked on the Edit page of the module:

Example*Current DNN Userinfo*

PortalID: 0
UserID: 1
User Name: host
User Email: mail@surveyproject.org

Current SurveyProject info

SurveyID: 0
UserID: 1

G. Survey Layout and Custom CSS

The layout and design of an individual survey can be customized in SP by creating and adding/editing a CSS file to the survey. See Menu Designer/Layout/. This CSS file is then saved to an SP file directory named:

[SP_root]\NsurveyAdmin\CSS\UserCSS\ [surveyID] \ [filename.css]

To make use of this custom CSS file when presenting the accompanying survey in DNN through the

SurveyBox module copy the surveyID directory and CSS file to the SurveyBox 'CSS' directory manually.

[DNN_root]\desktopmodules\surveybox\[css]\.....

If there is no custom css file linked to the survey the default surveymobile.css file is used to determine the design and layout.

Note: If a custom .css file does exist and is linked to the survey in SP but it is *not copied* to DNN Surveybox directory ***no CSS file will be activated***. Both the custom css file and the default surveymobile.css file are not linked.

Note: If multiple SurveyBoxes are used on the same webpage the .css file(s) linked to the different surveys (in case of customization) may affect and interfere with each other and the surveylayout.

In case of a DropDownList survey selection the page will switch .css files correctly without interference between surveys.

V. Limitations

When using the SurveyBox module to present surveys on a DNN webpage there are limitations to the SP Survey features that can be used.

Known limitations

o answertypes that will not properly work:

- (Google) Address Field
- Slider Field

o option Resultsreport on Completion not available

The combination of SP and DNN software is causing limitations. Next versions of the SurveyBox and SP v. 2.5 will solve some of these issues. Not all limitations can be resolved due to the technical setup of both DNN and SP and the use of different versions of third party code and scripts (e.g. JQuery).

Note: An alternative would be to make use of the DNN Iframe module and link to an SP survey url. This will make all SP survey features available. However some of the SurveyBox features (e.g. DDL selection/ Permissions) will not be available.

For technical information and backgrounds checkt the Github site at: <https://www.github.com/surveyproject>
This is where new issues can be reported and registered as well.

VI. Further Reading & Links

Survey™ Project

<http://www.surveyproject.org/> - SP Community site & Forums

<http://www.surveyproject.net/> - SP Test & Demo site

<https://www.github.com/surveyproject/> - Downloads, Releases, Sources, Development

SurveyBox DNN® module

<https://github.com/surveyproject/surveybox> – Downloads, Releases, Sources, Development

Dotnetnuke®

<http://dotnetnuke.codeplex.com/> - DNN Downloads

<http://www.github.com/dnnsoftware/> - Development & Releases

<http://www.dnnsoftware.com/> - DNN main site