

# How-To: Create a Self Registration Survey

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## Contents

- 1 Creating a Self-Registration Survey
- 2 Fields
  - 2.1 Gender
  - 2.2 Birth Year
- 3 Creating the Self-Registration Form
  - 3.1 Self-Registration Form
  - 3.2 Self-Registration Receipt
- 4 Providing Access in Admin Views and Forms
  - 4.1 Testing the Self-Registration
- 5 Creating Reports Based on the Data (CPPM 5.2/Amigopod)
  - 5.1 Specifying Extra Data Fields
  - 5.2 Filtering the Data Set
  - 5.3 Combining and Classifying Data
  - 5.4 Calculating Statistics
  - 5.5 Visualizing the Output
  - 5.6 Final Report
- 6 Creating Reports Based on the Data (CPPM 6.+)
  - 6.1 Set up form fields
  - 6.2 View Data

## Creating a Self-Registration Survey

Full Details with graphics at <http://www.amigopod.com/HOWTO/Survey/>

This HOWTO will describe the addition of a simple survey to a self-registration form, and how that data can be viewed and reported.

- Defining the Fields
- Creating the Self-Registration Form
- Providing Access in Admin Views and Forms
- Testing the Self-Registration
- Creating Reports Based on the Data

## Fields

The first step for a survey is to define the fields and the default values for the forms and views. Navigate to the Guest Manager -> Customization -> Customize Fields page.

We will be creating two fields: gender and birth\_year. Note that if you know of an existing field that looks or acts like your desired field, you can use the Duplicate action on the given field.

### Gender

Create a radio list for gender:

Field Name - Lower case keyword to use. This field will be the key in the database.  
Field Type - Gender will be a String key.  
Column Title - Used in any custom view (guest\_users) you would like the value displayed.  
Column Format - We will want to display the option value, not the key, so select Use form options  
User Interface - Radio Buttons  
Label: - The label in the form  
Options - The simplest way to enter a list is 'key|value' per row.  
Field Required - We want the gender, so fill in the value.

### Birth Year

Create a text field for birth\_year:

Column Format - This is just a year, so select Field Value

```
User Interface - Text field
CSS Style - The year will only be 4 digits, so we can cut the width down.
Validator - Give some thresholds for the year, and limit roughly 10-years old. Select IsInRange
Validator Param - Select (Use argument) to pass the value passed.
Validator Argument - Field arguments can be a scalar, or passed as an array.
```

The IsInRange validator requires an array with two elements, the min and max.

## Creating the Self-Registration Form

Now that the fields have been defined, we can create a self-registration page, and add the fields. Navigate to the Guest Manager -> Customization -> Guest Self-Registration page.

There are many details involved with self-registration. To makes things easy, we will duplicate the default entry. A page name and title will be automatically generated.

Click the Edit link to enter the Self-Registration overview. Note there are four main sections available to edit.

```
Master setup for names, enabling, skin, etc.
Registration Form
Success Receipt and Available Notifications
NAS Auto-Login
```

Click Rename Page so we can give our page a proper title.

```
Name - "Registration Survey"
Enabled - Checked
Register Page - survey. Note this value will be used in the URL to access the registration.
```

## Self-Registration Form

In the Registration box, click the Form link to display the list of current fields in use. Rows that are bold are currently enabled. If a row is not bold, we have added it for convenience and you are free to enable them. The fields will appear on the registration based on their rank, so it is important to choose your order wisely. The easiest way to get the desired order is to find the existing field you would like the new input to follow, and select Insert After. We will be putting our two fields after the email field.

In the field form, select gender in Field Name. Allow the form to auto-refresh itself to gain all the default values we previously entered.

```
Field Name - gender
Field - Enable this field
Rank - Leave default. The proper value should have automatically been calculated.
User Interface - Leave default. We will use the radio buttons entered above.
```

After saving, the new input should be automatically selected in the table. We can jump directly to the next input by clicking Insert After.

Similar to gender, select birth\_year for Field Name and make sure you enable the input.

At the top of the table there is a Preview tab. Click it to confirm the form looks as you would expect. If you would like to make any tweaks to the labels or description, feel free to go back and edit them. If you make edits here within the Self-Registration setup, the changes will be local to the form. If you would like to make a global change for all forms and views to use moving forwards, you must return the the Customize Fields page.

When you are happy with the form, click Back to guest self-registration editor at the bottom of the table.

## Self-Registration Receipt

In the Receipt box, click the Form link to display the list of current fields in use. Rows that are bold are currently enabled. If a row is not bold, we have added it for convenience and you are free to enable them. The fields will appear on the receipt based on their rank, so it is important to choose your order wisely. The easiest way to get the desired order is to find the existing field you would like the new input to follow, and select Insert After. We will be putting our two fields after the password field.

In the field form, select gender in Field Name. Allow the form to auto-refresh itself to gain all the default values we previously entered.

```
Field Name - gender
Field - Enable this field
Rank - Leave default. The proper value should have automatically been calculated.
User Interface - static_options. In general, most receipt items will be displayed as plain text.
Since our input element is from a list selection (radio, dropdown, etc.),
we will use the static_options display format to convert our values to the proper name.
```

After saving, the new display should be automatically selected in the table. We can jump directly to the next display by clicking Insert After.

In the field form, select birth\_year in Field Name. Allow the form to auto-refresh itself to gain all the default values we previously entered.

```
Field Name - birth_year
Field - Enable this field
Rank - Leave default. The proper value should have automatically been calculated.
User Interface - static. In general, most receipt items will be displayed as plain text.
Since our input element is from a simple text field,
we will use the static display format to display the value.
```

After saving the value, you can Preview the receipt and make any tweaks as desired. When you are happy with the form, click Back to guest self-registration editor at the bottom of the table.

## Providing Access in Admin Views and Forms

It may be important for the administrators to be able to view or edit the data that was entered by the user. In our example, we will add gender to the column list, and display both gender and birth\_year in the guest edit area. Navigate to Guest Manager -> Customization -> Customize Forms & Views and select guest\_users. guest\_users is the view representing List Accounts.

Click Edit Fields to adjust the layout of the columns. Similar to a form, the order of the columns in a view are determined by rank. We will add gender after the expiration column.

In the field form, select gender in Field Name. Allow the form to auto-refresh itself to gain all the default values we previously entered. We will use the default options, though make sure to check Enable this field.

The guest\_edit is the form responsible for the standard Edit action from the List Accounts page. Since the admin should not need to edit these values, they will exactly match the entries for the Self-Registration receipt.

## Testing the Self-Registration

We are now able to test the fields. Return to the self-registration overview and click Launch this guest registration page. A new page will open with the self-registration form.

For future reference, you will want to copy down the exact URL or the opened registration. This URL will need to be entered on the login screen so accounts can be created.

Test any error checking (like birth\_year 1492), and confirm the labels and descriptions are correct.

When you have entered correct data, the receipt will appear. Confirm the receipt is how you desire.

## Creating Reports Based on the Data (CPPM 5.2/Amigopod)

Though the raw data is now available to view for any user, the real investment and knowledge comes from reporting on the data. the Amigopod Reporting Manager is a powerful reporting tool capable of combining multiple data sets into a comprehensive and sharable report.

Navigate to the Reporting Manager -> List Reports page. Our sample survey report will be based off the Number of sessions per day report with the addition of a gender grouping. Select the report and click Duplicate.

A complete copy of the original will be created with the name Copy of Number of sessions per day. Select Edit to start the customization.

Edit takes you to an overview of all customization that can be made on the report. The arrows denote how the flow of data aggregation and parsing occurs. This HOWTO will only cover edits required for the survey. Feel free to view the setup for some of the other reports.

The first step will be to rename the report. Click Report Type.

```
Title - Number of sessions per day per gender
Description - Show the total number of sessions for all users per day grouped by gender.
```

Save Changes to continue.

## Specifying Extra Data Fields

Click Select Fields so we can add the other data elements required. Click Create Source Field to add gender.

```
Field Type - Data source field
Data Source Field - gender
Field Name - gender
Field Description - (User property) Visitor's gender
```

Create Source Field to continue.

```
Field Type - Data source field
Data Source Field - user_role
Field Name - user_role
Field Description - Name of the user role at the time the session started
```

Create Source Field to continue.

## Filtering the Data Set

Our system has many roles for various access onto the network. Our survey is only on the open guest network, so we will filter just users with role Guest. Click Source Filters to view the list of existing filters. Filters are performed in the order displayed, so to create a new one click Insert After.

```
Source Field - user_role
Filter Type - List: Value is one of a list
Match Values - Guest
Enable - Enable this filter
```

Save Changes to continue.

## Combining and Classifying Data

Classification groups are ways of collecting together groups of related input data records. In our example, the gender will be grouped so we can see the totals of each per day. Click Classification to view the list of existing groupings. Click Create Classifier to create a gender grouping.

```
Classification - Groups that have same value of source field
Source Field - gender
```

Save Changes to continue.

## Calculating Statistics

Statistics are fields with values that are calculated from a group of source fields. For example, the total sum of all fields in a particular group would be a statistic field. Click Statistics to view the list of existing groupings. The Number of sessions per day report already has a num\_sessions statistic. We will edit that to include our gender grouping. Select num\_sessions and click Edit to modify the settings.

```
Calculate Across - Group 1 (gender) - one value per group
```

## Visualizing the Output

Report output can be a mix of tables and charts. Click Presentation Options to view the list of existing display sets. The Number of sessions per day report has a Line Chart. We will turn this into a Stacked Column bar chart to differentiate gender values. Select Chart - Line and click Edit.

On a running system the edit screen will attempt to draw the current chart. Since we have no data, expect the demo chart to be blank.

```
Chart Type - Stacked Column
```

## Final Report

Once the system has collected some data, you should see similar to the following when running the report.

## Creating Reports Based on the Data (CPPM 6.+)

Currently in CPPM 6.0 + the data is in the CPGuest side and to retrieve the data you will need to follow a few steps and you will be able to export a CSV/TSV/XML of the users and survey data.

### Set up form fields

1. Click on export accounts

Guest

- Start Here
- Active Sessions
- Create Account
- Create Device
- Create Multiple
- Edit Accounts
- Export Accounts
- Import Accounts
- List Accounts
- List Devices

ClearPass Guest

Home » Guest » Export Accounts

## Export Accounts

To download a file containing the current list of guest accounts, select the format you would like to use.

**Export Comma-Separated Values (CSV)**

Export the list of user accounts in text format with commas separating each field.

**Export Tab-Separated Values (TSV)**

Export the list of user accounts in text format with a tab character separating each field.

**Export To XML**

Export the list of user accounts in XML format.

[Back to guests](#)
[Back to main](#)

2. In the top right corner click "Customize default export view"

Guest

Onboard + WorkSpace

Configuration

- Start Here
- Authentication
- Content Manager
- Email Receipt
- Fields
- Forms & Views
- Guest Manager
- Guest Self-Registration
- Hotspot Manager
- IP Phones
- Print Templates
- SMS Receipt
- Translations
- Web Logins

ClearPass Guest

Home » Configuration » Forms & Views

## Customize View Fields (guest\_export)

Use this list view to modify the fields of the view **guest\_export**.

Quick Help

Add Field

Rank	Field	Type	Title	Width
5	id	sort	User ID	50px
10	username	sort	Username	160px
20	role_name	sort	Role	120px
30	enabled	sort	Status	75px
40	start_time	sort	Activation	180px
50	expire_time	sort	Expiration	180px
60	expire_postlogin	sort	Lifetime	100px
70	do_expire	sort	Expire Action	150px
80	birth_year	sort	Birth Year	100px

[Back to list of forms & views](#)
[Back to configuration](#)
[Back to main](#)

3. Click add field

- Guest
- Onboard + WorkSpace
- Configuration
  - Start Here
  - Authentication
  - Content Manager
  - Email Receipt
  - Fields
  - Forms & Views
  - Guest Manager
  - Guest Self-Registration
  - Hotspot Manager
  - IP Phones
  - Print Templates
  - SMS Receipt
  - Translations
  - Web Logins

Home » Configuration » Forms & Views

## Customize View Fields (guest\_export)

Use this list view to modify the fields of the view **guest\_export**.

Quick Help <span>Add Field</span>					
Rank	Field	Type	Add Field	Title	Width
5	id	sort	User ID		50px
10	username	sort	Username		160px
20	role_name	sort	Role		120px
30	enabled	sort	Status		75px
40	start_time	sort	Activation		180px
50	expire_time	sort	Expiration		180px
60	expire_postlogin	sort	Lifetime		100px
70	do_expire	sort	Expire Action		150px
80	birth_year	sort	Birth Year		100px

[Back to list of forms & views](#)

[Back to configuration](#)


[Back to main](#)

4. In the drop-down select the fields you created (birth\_year/Gender)


## View Data

1. Click export in the format that you want. (below is a screen shot of CSV format)


File Home Insert Page Layout Formulas Data Review View




Paste



Cut



Copy





Format Painter


Clipboard


Calibri


11
















Font




























Alignment




Wrap Text




Merge & Center

Number




Conditional Formatting



Format as Table

A8



7

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Number	User ID	Username	Role	Activation	Expiration	Lifetime	Expire Act	Birth Year	Gender			
2	1	3207	57952237	[Guest]	5/28/2013 15:14	5/28/2013 16:14		1					
3	2	3143	58748336	[Contractor]	5/7/2013 17:25	5/14/2013 17:25	0	4					
4	3	3201	90-2B-34-I	[Guest]	5/25/2013 15:04	N/A	0	0					
5	4	3248	aaa@dss.	[Guest]	7/25/2013 20:57	7/26/2013 20:57	0	1					
6	5	3192	aruba@ar	[Guest]	5/24/2013 10:07	5/25/2013 10:07	0	1					
7	6	3245	B8-78-2E-	[Guest]	7/22/2013 16:31	N/A	0	0					
8	7	3182	bob@bob	[Guest]	5/21/2013 0:21	5/22/2013 0:21	0	1	1973	M			
9	8	3258	faa@bbb.	[Guest]	8/1/2013 7:59	8/2/2013 7:59	0	1					
10	9	3252	fred@arul	[Guest]	7/26/2013 9:53	7/27/2013 9:53	0	1					
11	10	3249	ggg@fff.	[Guest]	7/25/2013 21:38	7/26/2013 21:38	0	1					
12	11	3226	howudo@	[Guest]	6/13/2013 20:51	6/16/2013 20:51	0	1					
13	12	3251	mouse2@	[Guest]	7/26/2013 6:37	7/27/2013 6:37	0	1					
14	13	3250	mouse@a	[Guest]	7/26/2013 6:36	7/27/2013 6:36	0	1					
15	14	3247	pdobowski	[Guest]	7/26/2013 9:50	7/27/2013 9:50	0	1					
16	15	3229	teaconsul	[Guest]	8/6/2013 15:15	8/7/2013 15:15	0	1					
17	16	3204	test1@tes	[Contractor]	5/28/2013 3:34	5/29/2013 3:34	0	1					
18	17	3205	test2@tes	[Contractor]	5/28/2013 3:45	5/29/2013 3:45	0	1					
19	18	3228	troya@te	[Guest]	6/19/2013 21:06	6/20/2013 21:06	0	1					
20													
21													

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- This page was last modified on 18 February 2014, at 03:03.
- This page has been accessed 731 times.