

How-To: Create a Self Registration Survey

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 make 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 to 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 of 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



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



3. Click add field

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