



epiinfo™
Guide Series



Epi Info™ Guide to Web Survey



EPI INFO™ GUIDE TO

WEB SURVEY

Ver 1.0

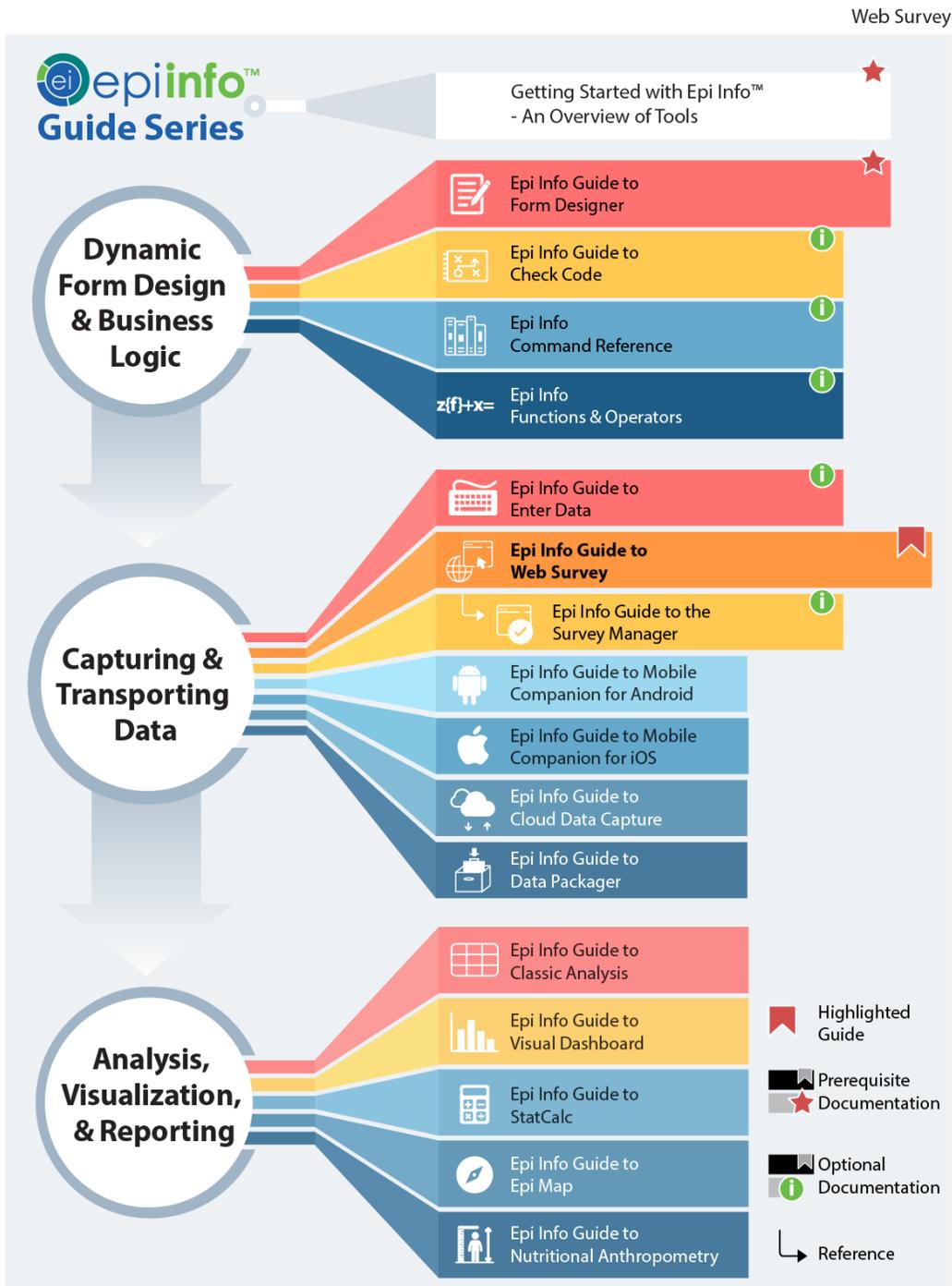
Preface

Epi Info™ is a public domain suite of interoperable software tools designed for the global community of public health practitioners and researchers. Perform data analysis with epidemiologic statistics, maps, and graphs. Build data entry forms, construct a database, and customize statistics applications. Physicians, Epidemiologists, and public health officials without a technical background can easily work with critical data using Epi Info™ tools.

Use this guide alone or as a supplement to other Epi Info™ guides. On the next page, view the complete collection of helpful guides available for Epi Info™ tools.

The diagram shows how this guide highlighted with the bookmark icon  fits into the big picture of the Epi Info™ suite. Additional guides may offer prerequisite information for the tool you're working with. For example, if you're working with Epi Info™ Web Survey (EIWS), then you are creating a custom data entry form and publishing it to an EIWS system deployed in your environment. Business logic is added to the developed form in Form Designer. Therefore, you may need to begin by consulting the Epi Info™ Guide to Form Designer as indicated by the prerequisite documentation icon (). Additionally, you may find helpful other guides that are indicated by the optional documentation icon (.

The image below shows the interrelationships among the guides in the series. This guide is *Getting Started with Epi Info™ – Guide to Web Survey*.



PREFACE

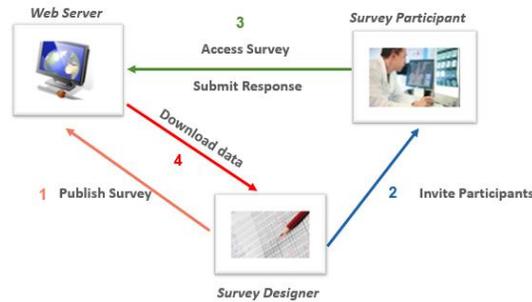
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Web Survey: Surveys Through the Internet

| Section Topics | |
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| Web Survey System Introduction | Publish Forms to the Web |
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Introduction

The Epi Info™ Web Survey System allows the survey designer to collect information from respondents over the Internet. Web Survey gives survey designers access to a wide variety and number of respondents. Publish survey forms to any pre-configured web server hosted by your institution or provider. When published, Epi Info™ creates a survey specific website address. The survey designer can distribute survey links over email, by posting links on a web page, or using other methods. Respondents access the web survey and submit their responses through a web browser or mobile device. After the respondent answers the survey, the survey designer downloads the response into the original Epi Info™ 7 project for analysis.



Web Survey System

Epi Info™ Web Survey System Deployment

The Epi Info™ Web Survey System is a companion to the Epi Info™ 7 suite of tools, and a separate package apart from Epi Info™ 7. The Web Survey System requires a server running Microsoft Internet Information Services (IIS) and a SQL Server database. The database securely allows users to publish surveys and collect data submitted by respondents. Without access to web and database servers hosting the Epi Info™ Web Survey System, users cannot publish surveys and collect data over the Internet using Epi Info™ 7.

Additional information about the Epi Info™ Web Survey System is located on the [Epi Info™ Web Survey page](#). This site contains setup instructions and links to download the free deployment package kit.

This user guide outlines the steps required to design and publish a form using the Epi Info™ 7 Form Designer tool, and import data submitted by survey respondents with Epi Info™ 7 Enter Data. The technical aspects of configuring web and database servers are beyond the scope of this guide.

Request keys and settings for the Web Survey System from your system administrator or managed services group responsible for supporting Epi Info™ Web Survey System.

Designing Forms for the Web

The Epi Info™ Web Survey System allows for publishing short, single form projects (without grids) to the web for online data entry. Certain features and behavioral differences exist between the web survey format and Epi Info™ 7 operation. Plan for these differences before designing a survey (not all field types or check code commands are supported). Also, required fields and drop-down lists may behave differently on web browsers than within Epi Info™ 7 Enter Data.

Start by setting the computer resolution to 1366 x 768 or 1024 x 768. These resolutions are common for desktop survey respondents. These settings minimize discrepancies between how the survey appears to both designer and respondent.

Adjustments for desktop resolutions are not required for survey respondents using browsers on smart phones and tablets. The Epi Info™ Web Survey System adjusts the display when a survey respondent uses a mobile device. Surveys for these smaller, screen-sized devices appear with a stacked question arrangement by tab order. For small mobile devices, the fields appear one above the next.

After creating a new blank project, follow these steps:

1. Consider the page layout and size. (Landscape provides more width than height.)
2. Set the page size and orientation.
3. Select **Format > Page Setup** from the menu.
4. Choose the size on the size drop-down list, (or select custom and enter the width and height in pixels.)
5. Select the **Landscape option** from the Orientation Group.

Supported Field Types, Commands and Functions

See below for a list of supported and non-supported field types. The Web Survey System does not support all field types available in the Epi Info™ 7 Form Designer tool.

| Supported field types: |
|---|
| <ul style="list-style-type: none"> • Label/Title • Text (Single line) • Multiline • Number • Date • Time (not Date/Time) • Checkbox • Yes/No • Option • Legal Values • Comment Legal • Codes • Group • Relate |

Although non-supported commands and functions don't work when entering data into a web survey, they are still compatible with Check Code on survey versions running on the Epi Info™ 7 desktop. After downloading the web survey responses you can run these commands and functions as normal, using Epi Info™ 7 Enter Data.

Supported Check Code Commands and Functions

The Web Survey tool does not support all Check Code commands and functions available in Form Designer. See below for a list of supported and non-supported commands and functions.

Supported Commands:

- Assign
- Clear
- Dialog
 - Simple Dialog only
- Enable / Disable,
- Go To
- Hide / Unhide
- Highlight / Unhighlight
- If / Then / Else
- Set-Required / Set-Not-Required

Non-Supported Commands:

- AutoSearch
- Define
- Dialog
 - Get Variable Dialog
 - List of Values Dialog
- Execute
- Geocode
- Help
- NewRecord
- Quit

Supported Functions:

- | | | |
|------------|-----------|--------------|
| • ABS | • Minute | • StrLen |
| • Cos | • Minutes | • Substring |
| • Day | • Month | • SystemDate |
| • Days | • Months | • SystemTime |
| • FindText | • Second | • Tan |
| • Hour | • Seconds | • UpperCase |
| • Hours | • Sin | • Year |
| • LN | | • Years |
| • LOG | | |

– Sub, Trunc and Round not listed.

Non-Supported Functions:

- | | |
|---------------|---------------|
| • CurrentUser | • Linebreak |
| • DateDiff | • NumToDate |
| • Date | • NumToTime |
| • Environ | • PFROMZ |
| • EpiWeek | • RecordCount |

Non-Supported Functions:

- Exists
- Exp
- FileDate
- Format
- Step
- TxtToDate
- TxtToNum
- ZSCORE

Non-supported commands and functions do not work when entering data into Web Survey. Non-supported commands are compatible with Check Code on the downloaded version of the survey. After downloading web survey responses, you can run non-supported commands and functions using Epi Info™ 7 Enter Data. For more information, review the Epi Info™ 7 — Guide to Enter Data.

Differences in Check Code Performance

In Check Code, the designer places commands within field blocks for actions such as **Before**, **After**, and **Click**. Check Code works differently in Web Survey than in Epi Info™ 7 Enter Data for drop-down list fields (e.g.: **Yes/No**, **Legal Values**, **Comment Legal**, and **Codes**).

In Epi Info™ 7 Enter Data, Check Code executes when you leave the field, while tabbing or clicking on another field. In the Web Survey System, Check Code executes as soon as you select options from a drop-down list. Web Survey System will execute check code commands from drop-down lists like **Enable/Disable**, **Hide/Unhide**, **Highlight/Unhighlight**, and **Set-Required/Set-Not-Required**.

Respondents must enter a choice in a required field. Web Survey and Epi Info™ 7 Enter Data will not let you save or navigate to a new field, when required fields are blank. Required field notifications remind you that required fields must not be left blank.

Confirm Web Survey Compatibility

You can ensure a web survey functions correctly by checking the tab order and entering test data. Try a practice sample analyses on some test data before publishing the form.

For information regarding Tab Order, refer to the Form Designer section – How to: **Use Tab Order**. Logical tab order is critical when the respondent uses a phone or tablet. Tab Order determines the order in which fields display on a mobile device. Check Code validates data entry depending in part, on logical tab order on the desktop too.

Review all field names to ensure each is concise and logical. Check various field names using the user-friendly **Data Dictionary**. For information regarding Data Dictionary, refer to the Form Designer section – **How To: View a Data Dictionary**. Once published, survey field names can't be changed.

Confirm tab order and field names and enter the sample test records. Click the Enter Data button from the **Form Designer** menu bar and preview the form in **Enter Data**. When entering test data, record any important changes prior to publishing the survey. Check the field validation and determine required fields. Be aware of valid ranges for numbers and date fields, or any other Check Codes that may apply.

Try conducting anticipated analyses using your test data. Confirm the field names are clear and easy to use. If you intend to use a tool other than Epi Info™ 7 for analysis, export the test data in the desired format. Common corrections include resetting a long field name or changing and adding a field type.

Note: Make corrections to field names and types before distribution.

Next, practice publishing the survey as a test. Follow the **Publish Form to Web** instructions. Confirm that you can publish the form, navigate among the pages, enter more test data, and reconfirm working validations and Check Code behavior.

Ensure full functionality by downloading test data and performing a sample analysis. If you notice errors, make corrections, and repeat this step until the survey functions as desired.

When testing is complete, remove all test data using the **Delete Data Table** function and publish the final version. For information regarding Delete Data Table, refer to the Form Designer section – **How To: Delete an Existing Data Table Without Deleting the Form.**

Initial Setup

Collecting data and publishing a survey requires information generated by the Web Survey System or the system administrator. This information adds security and provides access to each survey. View some key terms found in Web Survey:

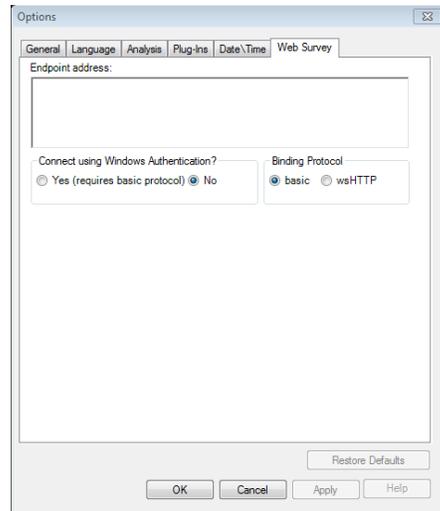
- **Endpoint Address** – designates the location or URL of the application that hosts surveys.
- **Organization Key** – provides survey designer access to publish the survey and import responses.
- **Survey Key** – identifies the survey that corresponds to a security token for downloading data.
- **Security Token** – grants access to survey data and prevents others with an organization key and survey key from accessing the data.

Before publishing a survey, designers must designate the endpoint address and binding protocol.

Contact your Web Survey system administrator for:

- An endpoint address
- Use of Windows authentication (Yes or No)
- A Binding Protocol (basic or wsHTTP)
- An Organization Key

From the Epi Info™ Form Designer menu, go to **Tools > Options**. Click on the Web Survey tab. The Web Survey Options dialog box appears.



Endpoint Address field

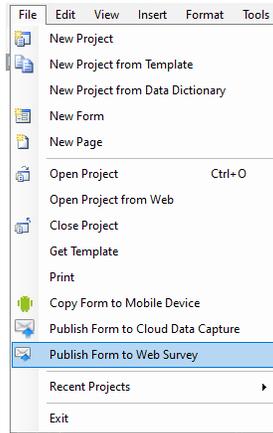
First, enter the **Endpoint address**, then enter your **Windows authentication**. Your Web Survey System administrator will provide you with a binding protocol.

Note: An example of an endpoint address is:

<http://MySurveyManager.MyCompany.com/SurveyManagerService.svc>

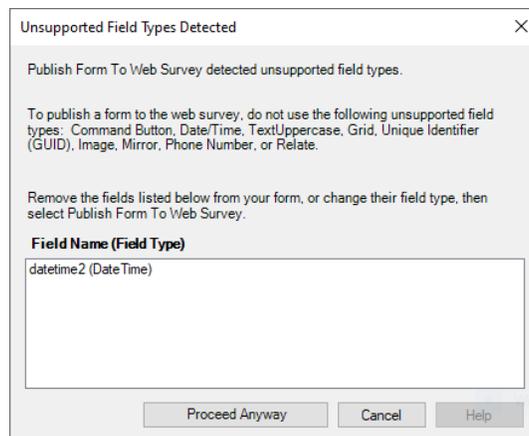
Publish Forms to the Web

You can publish a survey that is compatible with the Web Survey System. Use Form Designer with your completed form. From the Form Designer menu, select **File > Publish Form to Web**.



Publish Form to Web Survey

If a form contains a non-supported field type, you'll get an error message listing each invalid field.



Unsupported Field Types error

Meet publishing requirements by deleting or changing the field type of non-supported fields.



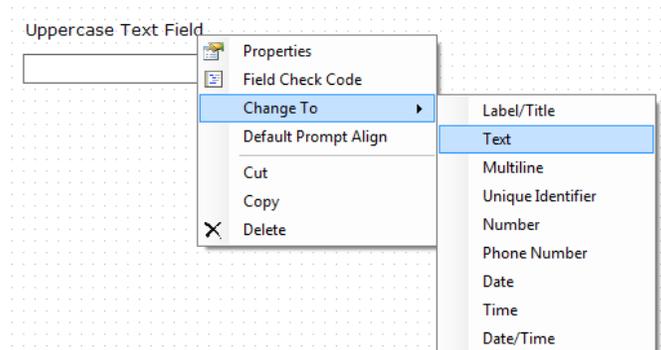
Warning! Before deleting a field, be aware that any collected data residing in the field will be permanently deleted.



Caution: Backup all data prior to deleting a field.

You can use the **Change To** option to change the field to a supported field type. Perform this action only if no data table is associated with the form. For information regarding Data Table deletion, refer to the Form Designer section – **How To: Delete an Existing Data Table Without Deleting the Form.**

Note: Form data tables exist under two conditions: when users access forms with Enter Data or working with existing published forms, regardless of previously collected data. You can remove a data table. Go to: **Tools > Delete Data Table.**



Change to Text Field Option

In the **Publish Form to Web** dialog box, fill out the required tabs listed below:

- Introduction Page – provides information to the survey respondent prior to beginning the survey. It includes the survey title, and introduction message. The survey number and organization name are optional.
- Exit Page – provides closing remarks to the survey respondent after they submit the survey.
- Publish Options – specifies technical aspects of the web survey posting process.

Use the dialog box navigation buttons:

- Previous button — returns to the previous tab.
- Next button — saves the information and proceeds to the next tab.
- Close button — allows the user to exit the **Publish Form to Web** dialog box and return to the **Form Designer** window.
- Publish button — attempts to publish the survey. Missing required information generates an error message.

Publish Form to Web dialog box

On the Introduction Page tab, click in the **Give Your Survey a Title** textbox to enter the survey title. This title will appear at the top of each page in the survey.

Enter your survey number or ID, organization name and department name. This information appears at the top of the introduction and exit pages.

Note: Entering a survey title is required. Use the organization name for tracking.



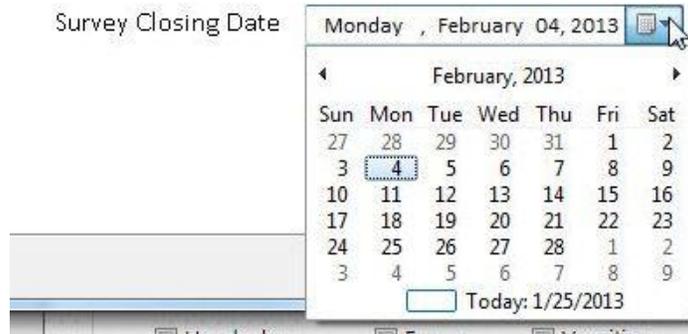
Warning! Do not put the **Organization Key** into the **Organization Name** field on the **Introduction Tab**. The organization key allows you to post a survey to the web server. Always secure the organization key.

The Welcome textbox provides respondents with a greeting, special instructions, or additional information about the survey. Click in the **Welcome!** textbox and enter a message.

Intro Page with Welcome Screen

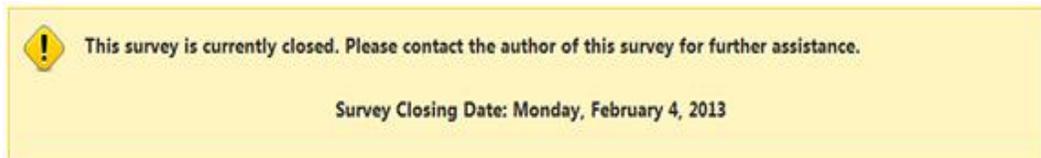
Select the **survey closing date** from the **Survey Closing Date** drop-down menu located below the **Welcome!** textbox. This field only accepts a future calendar date.

Note: The default setting is 10 days from the current date.



Survey Closing Date

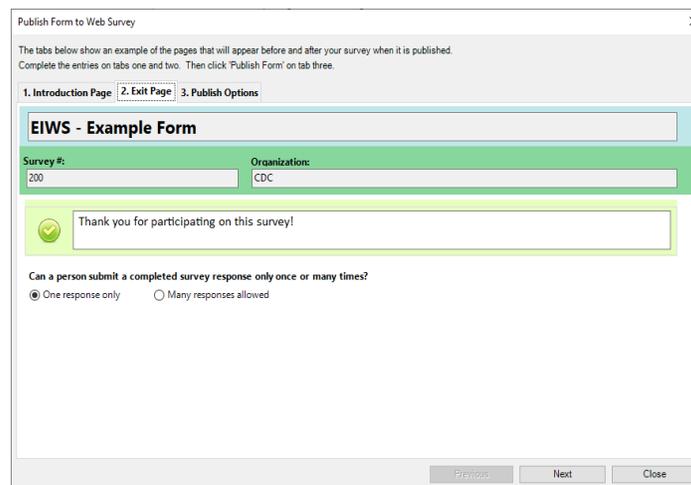
At 11:59:59.99 pm on the selected survey closing date, any attempt to access the survey will prompt the message below.



Closed Survey Message

Click **Next** to save this information and proceed to the **Exit Page** tab.

Note: Edit the Introduction Page at any point prior to publishing the survey by clicking on the Introduction Page tab.



Survey Exit Notification

The **Exit Page** displays closing remarks or additional instructions about the survey. Enter your comments in the textbox next to the green check mark. The example above displays, “**Thank you for completing this survey,**” and **The Survey #**. Organization and Department fields populate based on the information provided in the Introduction Page tab. Clicking on these fields will direct you back to the Introduction Page. Click **Next** to proceed to the Publish Options tab.

Publish Options Tab

Respondents can submit several responses per session by selecting the **Many responses allowed** button. The default setting is **One response only**, which closes the survey after the respondent submits one record.



Caution: Selecting **One response only** will not prevent a respondent accessing a survey link, more than once.

Enter the Organization Key provided by the Web Survey System administrator.

Note: For accuracy, copy and paste the Organization Key directly from an email attachment into the Organization Key field. The Organization Key must be a valid global unique identifier. A valid key enables the **Publish Form** button. An Organization Key looks like this: 3f6c6251-4af6-40f7-a440-cb2a9ca92e17.

Click Publish Form

If you receive an error message in the **Publish Status field**, contact your Web Survey System administrator. You can view detailed information about the error by clicking the **Log button**. Typically, an error message occurs in the Publish Status field due to an invalid or missing endpoint address.

The web URL, Survey Key and Security Token fields populate when the survey is published. Survey respondents can access a survey using the web URL.

Click the **Copy All to Clipboard button**. Save this information to a familiar location so you can use it again.



Warning: The URL, survey key and security token are all required to access the survey and survey data. Do not lose your Security Token. Security Tokens are not recoverable. Keep the security token in a secure location. Do not share the security token with survey respondents.

Invite Respondents to Take the Survey

Respondents can access a published web survey any time until the survey closing date. Respondents locate the survey using the web URL. Review the steps in the Publish Form to Web section. Designers can invite respondents by distributing the survey links through email, posting it to web pages, or sharing links elsewhere.

Locate Surveys Using a Web URL

Launch your web browser. Copy and paste the URL into the address bar at the top of your browser window. If the survey is not closed, the survey **Welcome!** page appears.

EWIS- Example Form

Survey #: 200 Organization: CDC

Please fill out this survey and click on the SUBMIT SURVEY to submit your responses.

f683 ! Please save this pass code in reference to your survey response.

Begin Survey

Survey Starting Date: Tuesday, June 22, 2021 12:00 AM
Survey Closing Date: Friday, July 2, 2021 11:59 PM

! Notice to Respondents:

This Epi Info™ Secure Web Survey system is approved for the collection of Personally Identifiable Information (PII) and Protected Health Information (PHI) as described in 45 CFR 160.103 and summarized at [Summary of the HIPAA Privacy Rule](#) and [HHS Office of Civil Rights: Summary of the HIPAA Privacy Rule PDF](#). The survey that follows "MAV" collect your personally identifiable information. If you have any questions about how your data will be used, protected, and possibly shared, please contact the survey authors listed in the survey.

Powered by: Version: 1.0.0

Begin Survey Example

Notice that a pass code is provided so that users can return to an incomplete survey later. A **DRAFT** watermark appears to indicate the survey mode. This mode allows testing for survey functionality and rendering.

Click **Begin Survey**. The first page of the survey appears.

Web Survey Form

Enter your response to each survey question. Go to the next page of the survey by clicking on the navigation button on the top left corner of the screen. You can also click the **Continue** button at the bottom of the page. Clicking the **Submit Survey** button or the **Finish Later** button at the bottom of the page saves the completed form. Learn more about the **Finish Later** button in the section: [Saving Survey Answers for Future Submission](#).

EWIS- Example Form

E. Coli O157:H7 Food History Questionnaire

Case ID: 548 Date of Interview: 02/04/2021

All data contained herein are fictional

Demographic Information

First Name: JOHN Last Name: SMITH Sex: M-Male

DOB: 06/24/1988 Age: Ethnicity Group: 21865-Not Hispanic or Latino State: AL

Race: White Black Asian Native Hawaiian/Other Pacific Islander American Indian/Alaskan Native Multiracial Unknown/Other

Occupation: IT Email Address: johnsmith2@gmail.com Home Phone: 404-777-8745

Symptoms and Illness

Was the patient ill? Yes

Symptom Onset Date: Onset Week: Duration of Symptoms:

Headache Fever Vomiting Bloody diarrhea Non-bloody diarrhea

Poor feeding Chills Irritable Nausea Abdominal cramps

Highest fever temp:

E. coli Web Survey Questionnaire

Submitting Survey Responses

After completing the last page of the survey, click **Submit Survey**.

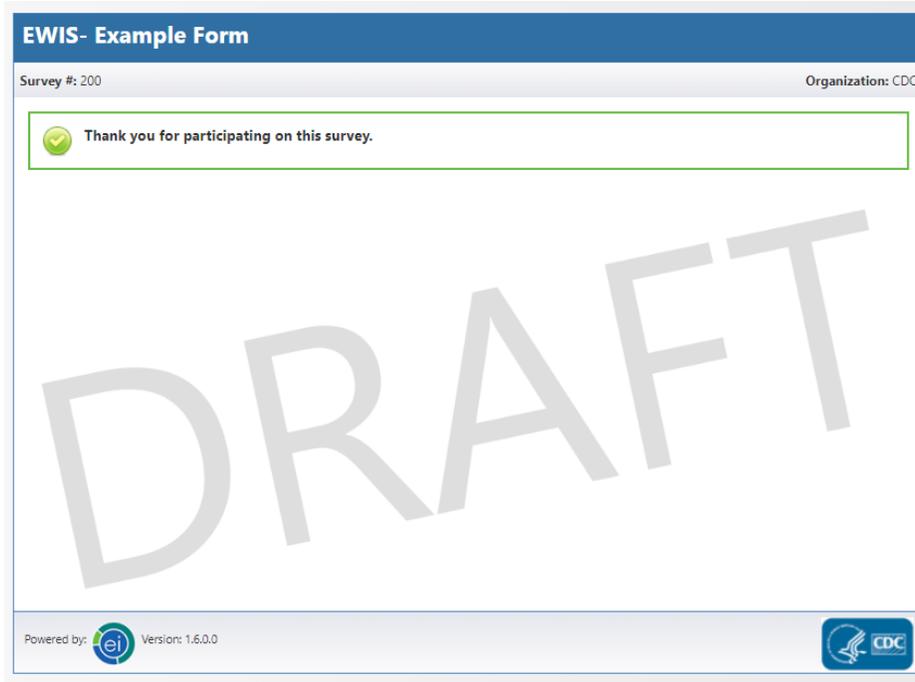
Previous Finish Later Print / Download CSV Submit Survey

Powered by: ei Version: 1.6.0.0

CDC

Submit Survey Window

The **Exit Page** displays a thank you message.



Survey Exit Page

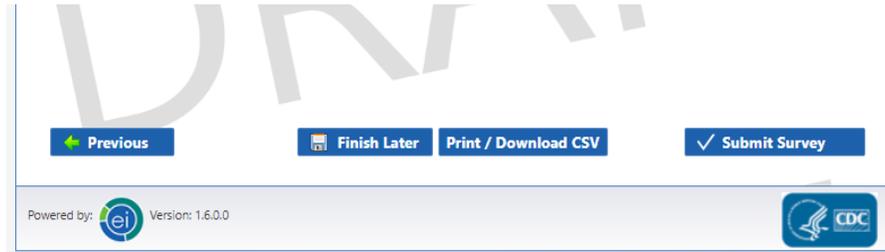
If you selected **Many responses allowed** in the **Publish Options** tab, the **Start Survey Again** message will display. This offers respondents an opportunity to submit multiple responses.



Start Survey Again message

Saving Survey Answers for Future Submission

Respondents can save the survey and finish their responses later. Save the survey by clicking the **Finish Later** button located at the bottom of each page in the survey.



Finish Survey Later Option

A dialog box appears with a survey link and pass code.

 A screenshot of the 'EWIS- Example Form' interface. A dialog box titled 'Your Survey has been saved.' is open in the center. The dialog box contains the following text: 'Please copy and save the Survey Link and Pass Code in order to return to the survey at a later time.' Below this, it shows a 'Survey Link' field with a long URL, a 'Pass Code' field with the value 'a6c4', and an 'Email Subject' field with the text 'Link for Survey: EWIS- Example Form'. There are also 'Email:' and 'Confirm Email:' input fields and a 'Send' button. A note at the bottom of the dialog box states: 'Note: Your email address will not be saved and will only be used to send you the survey link.' The background shows parts of the survey form, including 'Foods Eaten' and 'Lab Testing and Results' sections.

Pass Code Field

Copy and save the survey link and pass code. The survey can't be accessed without a survey link and pass code. Respondents can continue a survey by clicking **Survey Link** or **Pass Code**.



Warning! Respondents must restart the survey if the pass code or survey link is lost.

There is an option to email the survey link and pass code. Outgoing email addresses are not retained by the system.

1. Enter a valid email address in the **Email textbox**.
2. Re-enter the email address in the **Confirm Email** textbox.
3. Click **Send**. The respondent will receive an email with the survey link and pass code.
4. To complete the survey, copy and paste the survey link into a web browser or click on the link in the email.
5. Enter the **pass code** into the **Pass Code** textbox. Click **Go**.

Enter Pass Code to View

The displayed survey form contains all saved respondent entries.

EWIS- Example Form

1 2 Exit Survey

E. Coli O157:H7 Food History Questionnaire

Foods Eaten

| | | | |
|--|---|--|--|
| <input checked="" type="checkbox"/> Fresh celery | <input type="checkbox"/> Grapes | <input type="checkbox"/> Blueberries | <input type="checkbox"/> Breast milk |
| <input checked="" type="checkbox"/> Skim milk | <input type="checkbox"/> Cheddar cheese | <input type="checkbox"/> Peaches | <input type="checkbox"/> American cheese |
| <input checked="" type="checkbox"/> Strawberries | <input type="checkbox"/> Orange juice | <input type="checkbox"/> Apple juice | <input type="checkbox"/> Fresh tomatoes |
| <input type="checkbox"/> Beef jerkey | <input type="checkbox"/> Sour cream | <input type="checkbox"/> Vienna sausages | <input type="checkbox"/> 2% milk |
| <input type="checkbox"/> Ice cream | <input type="checkbox"/> Turkey | <input type="checkbox"/> Whole milk | <input type="checkbox"/> Raw carrots |
| <input type="checkbox"/> Bean sprouts | <input type="checkbox"/> Butter | <input type="checkbox"/> Cooked bacon | |

Where did you buy meat, vegetables or other groceries that were eaten in the 10 days before the patient got sick?

Lab Testing and Results

Stool sample submitted for enteric culture?

Collection date:

O157:H7 isolated?

Lab: Lab results:

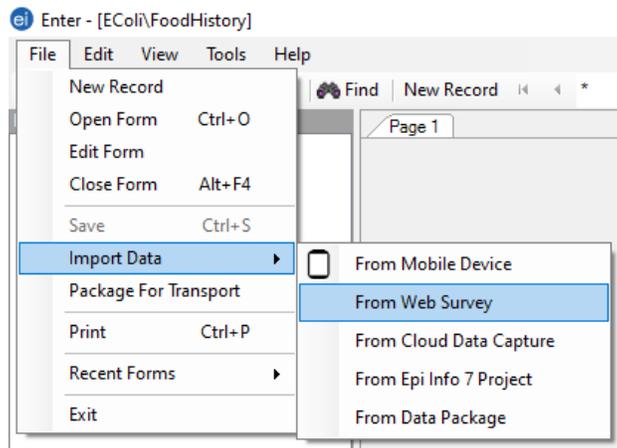
Incomplete Survey Form

Importing Survey Data

From the Epi Info™ main menu, select **Enter Data**. The **Enter Data** module opens.

Steps:

1. Open the project and form for the published web survey.
2. From the File menu, select **Import Data > From Web**.



Import Data from Web

3. Enter the **Web Survey Key**, **Organization Key**, and **Security Token** into the Import web form data dialog box (Refer to **Publish Form to Web**, Step 13 for this information.)

Import Data From Web Survey

The import process will merge records from a web-based version of this form based on each record's GlobalRecordId value. Records in the destination form whose GlobalRecordId value matches a record in the source form will be updated, and unmatched records will be appended. Fields that exist in only the source form or only the destination form will be ignored.

Warning:
Import operations are permanent and cannot be undone. Be sure the form structures are the same before proceeding.

Import Information
 Organization Key:
 Web Survey Key:
 Security Token:

Mode to Import
 Records in FINAL mode
 Records in DRAFT mode

Records to Import
 Incremental import (records not yet imported)
 Finished records only
 Full import (includes previously imported records)
 Finished records only
 Unfinished and finished records

6/22/2021 11:27:22 AM: Loaded data import dialog. Ready.

Ready

Import Data Form

4. Click **Import**.



Caution: Ensure you've entered the endpoint address in the Web Survey dialog box, or you may see an error.

5. After the import is complete, click **Close**. The responses in the survey are added to your Epi Info™ database. Add newly submitted responses by repeating the import process without generating duplicate records.

The screenshot shows a web browser window displaying the 'E. Coli O157:H7 Food History Questionnaire' data screen. The browser's address bar shows '360 of 360' and navigation buttons for 'Delete', 'Undo/Redo', 'Line Listing', 'Dashboard', 'Map', 'Edit Form', and 'Help'. The page header includes the CDC logo and the text 'U.S. DEPARTMENT OF HEALTH HUMAN SERVICES Centers for Disease Control and Prevention'. The main content area is titled 'E. Coli O157:H7 Food History Questionnaire' and contains the following fields and sections:

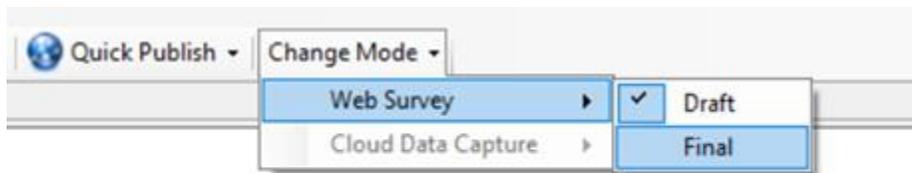
- Case ID:** 1
- Date of Interview:** 1/29/2012
- Demographic Information:**
 - First Name:** Joe
 - Last Name:** Smith
 - Sex:** M-Male
 - DOB:** 1/17/2003
 - Age:** 9
 - Ethnicity Group:** 21352-Hispanic or Latino
 - Race:** White, Native Hawaiian/Other Pacific Islander, Unknown/Other, Black, American Indian/Alaskan Native, Asian, Multiracial
 - Address:** 1600 Clifton Rd.
 - State:** GA
 - Latitude:** [empty]
 - Longitude:** [empty]
 - Occupation:** [empty]
- Symptoms and Illness:**
 - Yes:** [dropdown menu]
 - Date:** 1/25/2012
 - Duration:** 3 days
 - Symptoms:** Headache, Fever, Vomiting, Bloody diarrhea, Non-bloody diarrhea, Poor feeding, Chills, Irritable, Nausea, Abdominal cramps
 - Temperature:** 101.1
 - No:** [dropdown menu]

Data Screen after import

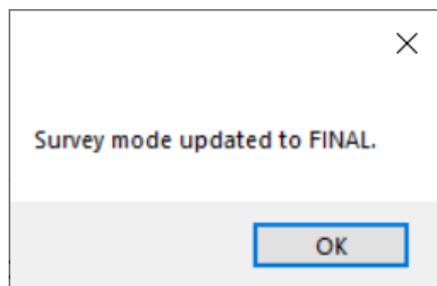
Collected data is ready for analysis. Refer to Visual Dashboard or Classic Analysis sections of the User's Guide for more information about analysis features.

Changing Survey Mode from Draft to Final

When the designer of the survey has completed all the changes of the survey and republished the survey in **DRAFT** mode to validate functionality and rendering of the form, the designer will need to change the mode of the survey from **DRAFT** mode to **FINAL** mode. This process removes the **DRAFT** watermark on the survey and establishes the final version. To change the survey mode simply use the **Change Mode** option on the Form Designer menu bar and select **Final**.



A confirmation message will be displayed to the user. The generated URL is useful for any messaging for respondents.





Epi Info™ 7 Guide to Web Survey

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