# FIREFLY WEB SERVER 2007

# USER MANUAL

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# Contents

# Firefly Web Server

Firefly Web Server is the central web server product used to manage your Spark applications, run them on the web and collect data. Firefly Web Server comes with copies of Firefly Designer that can be run directly through a web browser (using 'install-on-demand')

# Sparks

This allows you to manage (update, run, delete or produce a summary of) any of your published Spark applications.

To organize your Spark applications, click on the **Sparks** menu.

## Sparks screen

| | |
|---|---|
| Example link: | Shows the HTML link needed to reach the Spark applications in your author account. |
| Template: | Allows you to select a design template to use when test running your Spark application (see 'Run' below). |
| Name: | The name you gave to your Spark application (see Summary Information). |
| Author: | The name of the Spark author (see Summary Information). |
| Registration: | The registration type for your Spark application (see 'Registration Type' below). |
| Update: | Allows you to update the details of your Spark application (see 'Update Details Screen' below). |
| Run: | Allows you to run your Spark application (as the Spark user will see it). |
| Summary: | Shows you the plain language report summary for the Spark application. |
| Delete: | Allows you to delete the Spark application. |

## Update Details Screen

| | |
|---|---|
| Name: | The name you gave to your Spark application (see Summary Information). |
| Description: | The description of your Spark application.  This is displayed to the Spark users and should explain the purpose/benefits of the Spark application (see Summary Information). |
| Remarks: | Any remarks or reference notes you might have regarding your Spark application.  This is only available to you (see Summary Information). |
| Author: | The name of the person who built your Spark application.  This is only available to you (see Summary Information). |

## Registration Type

You can select from the following options under the Registration Type menu:

| | |
|---|---|
| Not assigned: | Makes your Spark application inaccessible to any user. |
| Public: | Makes your Spark application publicly available so anyone can access it. |
| Registered: | Only registered Spark users can access the Spark application (see Organize Users). |
| Public registration: | Spark users can only access your Spark application if they first register or have a valid Spark user account (see Organize Users). |
| Anonymous key: | Firefly can automatically generate a unique access key (a series of letters and numbers) which you give to any Spark user to enable them to access the Spark application.  The Spark user does not need to register and is not individually identified.  See 'Generate' below. |
| Key registration: | Firefly can automatically generate a unique access key (a series of letters and numbers) which you give to any Spark user to enable them to access the Spark application.  Spark users can only access your Spark application if they also register or have a valid Spark user account (see Organize Users and 'Generate' below). |

## Events Configuration

You can select from the following options under the Events Configuration menu:

| | |
|---|---|
| As they happen: | If your Spark application has any events, they will be triggered when the Spark user reaches the relevant item in your Spark application. |
| When the interview is finished: | If your Spark application has any events, they will only be triggered if and when the interview is completed. |

## Tree Walking Configuration

You can select from the following options under the Tree Walking Configuration menu:

| | |
|---|---|
| Don't use tree walking: | Select this option if you want to show the Spark user each item as a separate screen. |
| Provide the full tree walking facility: | Select this option to show the Spark user the route they have taken through your Spark diagram.  The screen shows all possible options for each response they have given. |
| Provide tree walking showing only the selected choices: | Select this option to show the Spark user the route they have taken through your Spark diagram.  The screen shows the selected option only. |

# Configuration

| | |
|---|---|
| Allow users to remotely synchronies with this Spark: | Tick this box if you want to allow remote Spark users to access this Spark application. Remote users can access Spark application updates through Firefly User and this facility gives them access to download the latest Spark application. Only registered users can access this facility. |
| Provide save facility: | Tick this box if you want to enable the Spark users to stop and save their interview (to complete at a later stage). Only registered users can access this facility. |
| Allow the user to change the save name: | Tick this box if you want to enable the Spark users to change the name the interview will be saved as. You can specify a default save name using the Edit Summary facility in Firefly Designer. Only registered users can access this facility. |
| Automatically fill details items with the user registration details: | Tick this box if you want the details item to be automatically filled with the user's account registration details. Only registered users can access this facility. |
| Provide notes facility: | Tick this box if you want to allow the Spark users to append notes to their interview. |
| Provide summary facility: | Tick this box if you want to allow the Spark users to view the audit trail of their interview. |
| Use the advanced editor where appropriate: | Tick this box if you want to provide the advanced editor to the Spark users. The advanced editor is a 'Microsoft Word style' editor (written in JavaScript) which is used whenever a Spark user is asked to provide text responses (long text) or when writing notes. |
| Use the advanced calendar where appropriate: | Tick this box if you want to provide the advanced calendar to the Spark users. The advanced calendar is a standard date selection tool (written in JavaScript) which is used whenever a Spark user is asked to provide a date response. |
| Provide unfinished interviews facility: | Tick this box if you want to provide access to unfinished interviews to the Spark users (interviews that have not been saved, but exited). Only registered users can access this facility. |
| Close Spark window on finish: | Tick this box if you would like Firefly to close the browser window when the Spark user has completed or saved the interview. |
| Home Location: | You can optionally provide a URL which will be used when the Spark user clicks on the 'home' button. |
| Finish Location: | You can optionally provide a URL which will be used when the Spark user completes or saves an interview. |

# Access Key

| | |
|---|---|
| Generate | Click this link to generate (or re-generate) the access key for 'anonymous key' and 'public registration key' registration types. |

# Group Access

If your Spark application is only available to registered users, you can specify the user groups which will have access to it. To select more than one group, hold the <ctrl> key.

# Category

You can specify a category to which this Spark application belongs.
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# Interviews

This allows you to manage (view, delete or filter) any of the Spark users' interviews.

To organize your interviews, click on the **Interviews** menu.

## Interviews Screen

You can filter the interviews displayed in the list by setting the Filter Options:

| | |
|---|---|
| User: | Allows you to filter by a specific user. |
| Start Date: | Allows you to filter the interviews that were started on or following the specified date. |
| Finish Date: | Allows you to filter the interviews that were finished on or before the specified date. |
| Finished: | Allows you to filter by whether or not they have been completed. |
| Spark: | Allows you to filter by Spark application. |
| Event: | Allows you to filter by event (only available if you are filtering by a particular Spark application). |
| Go: | Performs the filter. |

## The Interviews Table

| | |
|---|---|
| Delete | Deletes any interviews where the box is ticked. |
| <tick box>: | Tick this box if you wish to delete the interview (this is done by clicking the 'Delete' button). Be careful when deleting interviews that are not actually finished (that may be a live interview currently being undertaken by a Spark user). |
| Date: | The date the interview was started. You can sort the table by date order by clicking the appropriate arrow. |
| Spark: | The Spark application used for the interview. You can sort the table by Spark application name by clicking the appropriate arrow. |
| User: | The Spark user who undertook the interview. You can sort the table by Spark user by clicking the appropriate arrow. |
| Finished: | The date the interview was finished. You can sort the table by date order by clicking the appropriate arrow. |
| View | Click this link to view the complete audit trail of the interview. |

# Groups

This allows you to define groups of Spark users who will have access to specific Spark applications (if the Spark application requires a login). To organize your groups, click on the **Groups** menu.

## Groups Screen

| | |
|---|---|
| Add new: | Allows you to create a new group. |
| Name: | The name of each group held in the system. |
| Update: | Allows you to update an existing group (including delete). |

## Update Details Screen

| | |
|---|---|
| Group: | Allows you to select from the list of existing groups or 'Add new' to create a new group. |
| Delete: | Allows you to delete the selected group. |
| Name: | The name of the group (required). |
| Description: | Allows you to record a description of the group. |
| Update: | Adds or updates the group in the system. |
| Clear: | Clears the screen of the group details. |

## Group Users

| | |
|---|---|
| Name: | The username of each user belonging to this group. |
| Update: | Allows you to update an existing user (including delete). See Organize Users. |
| View Interviews: | Allows you to view the list of interviews undertaken by an existing user (see Organize Interviews). |

## Group Spark applications

| | |
|---|---|
| Name: | The name of each Spark application belonging to this group. |
| Update: | Allows you to update an existing Spark application. See Organize Spark applications. |
| Summary: | Allows you to view the plain language report describing the Spark application (see Organize Spark applications). |

# Users

You can set different levels of access for users of Firefly Web Server. Each of these levels or 'roles' gives access to different features.

The different user roles are described below:

| | |
|---|---|
| Administrator | This account provides full access to Firefly Web Server and should only be used to manage user access and provide support. An administrator can set up all levels of users. |
| Author | This account should be given to Spark authors and provides access to Firefly Designer and allows the user to publish Spark applications, manage Spark user access and data. Firefly Designer comes with a bundled copy of Firefly Reports. A web service user can set up reports and Spark user accounts. |
| Reporter | This account should be given to those who need to manage data and allows the user to capture data and view reports. |
| Spark User | This account is only used for Spark applications that require the Spark user to log in. The Spark user is the end-user of the Spark applications you have created using Firefly Designer. |

To organize your user accounts, click on the **Organize Users** menu.

## Users Screen

| | |
|---|---|
| Add new: | Allows you to create a new user account. |
| User Role: | Allows you to select the appropriate user role (see table above). |
| Name: | The username for each user held in the system. |
| Update: | Allows you to update an existing user (including delete). |
| View Interviews: | Allows you to view the list of interviews undertaken by an existing user (see Organize Interviews). |

## Update Details Screen

| | |
|---|---|
| User Role: | Allows you to select the appropriate user role for the user. |
| User: | Allows you to select from the list of existing users or 'Add new' to create a new user account. |
| Delete: | Allows you to delete the selected user. |
| First Name: | The first name of the user (required). |

| | |
|---|---|
| Last Name: | The last name of the user (required). |
| Company: | The company of the user. |
| Address: | The address details of the user. |
| City: | The city of the user. |
| Region: | The region of the user. |
| Post Code: | The post code of the user. |
| Country: | The country of the user. |
| Primary Telephone: | The primary telephone number of the user. |
| Secondary Telephone: | The secondary telephone number of the user. |
| Fax: | The fax number of the user. |
| Group: | The group or groups in which this user belongs. This is only needed for Spark users and is required for them to access any Spark applications on the system that have login access. |
| E-mail Address: | The e-mail address of the user (required). This is also used as the username for login access. The e-mail address must be unique. |
| Password: | The password of the user. |
| Re-type Password: | The same password as above (to ensure it was entered correctly). |
| Update: | Adds or updates the user in the system. |
| Clear: | Clears the screen of the user details. |

# Categories

This allows you to categorize your Spark applications into different subjects and topics. This facility is useful when integrating Firefly Enterprise with an existing content management system or web site. Firefly Enterprise provides linking information for selected categories.

To organize your categories, click on the **Organize Categories** menu.

## Features

### Organize Categories Screen

| | |
|---|---|
| Add new: | Allows you to create a new category. |
| Name: | The name of each category held in the system. |
| Update: | Allows you to update an existing category (including delete). |

### Update Details Screen

| | |
|---|---|
| Spark Category: | Allows you to select from the list of existing categories or 'Add new' to create a new category. |
| Delete: | Allows you to delete the selected category. |
| Name: | The name of the category (required). |
| Description: | Allows you to record a description of the category. |
| Update: | Adds or updates the category in the system. |
| Clear: | Clears the screen of the category details. |

#### Category Spark applications

| | |
|---|---|
| Name: | The name of each Spark application belonging to this category. |
| Update: | Allows you to update an existing Spark application. See Organize Spark applications. |
| Summary: | Allows you to view the plain language report describing the Spark application (see Organize Spark applications). |

# Templates

This allows your web designer to format the template for the screens to be displayed to the Spark user. The template sets the overall look and feel of your Spark application (see The User Desktop).

To organize your templates, click on the **Templates** menu.

## Templates Screen

| | |
|---|---|
| Add new: | Allows you to create a new template. |
| Name: | The name of each template held in the system. |
| Update: | Allows you to update an existing template (including delete). |

## Update Details Screen

| | |
|---|---|
| Template: | Allows you to select from the list of existing templates or 'Add new' to create a new template. |
| Delete: | Allows you to delete the selected template. |
| Name: | The name of the template (required). |
| Description: | Allows you to record a description of the category. |
| Buttons: | If the 'Use a button' box is ticked, type in the text which will be displayed on the button. If this is not ticked, you can provide the HTML for an image (which will be used as the button). |
| Required Indicator: | Type in the text (e.g. 'required' or '*') or provide an HTML image reference which will be will be displayed to the Spark user next to required fields. |
| Header: | The header HTML text for the main template. |
| Footer: | The footer HTML text for the main template. |
| New Window Header: | The header HTML text for Spark applications that are started in a new window. |
| New Window Footer: | The header HTML text for Spark applications that are started in a new window. |
| Width: | The width of new windows. |
| Height: | The height of new windows. |
| Summary Header: | The header HTML text for the summary window. |

| | |
|---|---|
| Summary Footer: | The footer HTML text for the summary window. |
| Notes Header: | The header HTML text for the notes window. |
| Notes Footer: | The footer HTML text for the notes window. |
| Help Header: | The header HTML text for the help window. |
| Help Footer: | The footer HTML text for the help window. |
| Style: | The style sheet for the user desktop. |
| Update: | Adds or updates the category in the system. |
| Clear: | Clears the screen of the category details. |

# Settings

This allows you to specify the user desktop settings for the author account.

To adjust the system settings, click on the **Settings** menu.
The following settings refer to the features you can make available to the Spark user through the user desktop when they go through your Spark applications:

| | |
|---|---|
| Delete saved interviews: | Allows the Spark user to delete their saved interviews. |
| Export saved interviews: | Allows the Spark user to export their saved interviews into a variety of formats (see 'Export screens...' below). |
| View the summary of saved interviews: | Allows the Spark user to view the audit trail summary for saved interviews. |
| Delete unfinished interviews: | Allows the Spark user to delete their unfinished interviews. |
| Export unfinished interviews: | Allows the Spark user to export their unfinished interviews into a variety of formats (see 'Export screens...' below). |
| View the summary of unfinished interviews: | Allows the Spark user to view the audit trail summary for unfinished interviews. |
| Delete finished interviews: | Allows the Spark user to delete their finished interviews. |
| Export finished interviews: | Allows the Spark user to export their finished interviews into a variety of formats (see 'Export screens...' below). |
| View the summary of finished interviews: | Allows the Spark user to view the audit trail summary for finished interviews. |
| Run Sparks in a new window from the user desktop: | Opens a separate browser window when running a Spark application. |
| Run Sparks in the same window as the user desktop: | Allows the Spark user to run a Spark application in the existing browser window. |
| Export screens | Allows the Spark user to export the summary or specific screens to |

| | |
|---|---|
| to Microsoft Word (2000/XP/2003): | Microsoft Word (2000/XP/2003). |
| Export screens to Microsoft Excel (2000/XP/2003): | Allows the Spark user to export the summary or specific screens to Microsoft Excel (2000/XP/2003). |
| Export screens to HTML: | Allows the Spark user to export the summary or specific screens to HTML). |

# Support

This allows Spark authors to contact and seek support from your in-house Firefly Web Server administrator. It is only available between Spark authors and the Firefly Web Server administrator.

Whenever a support request is added or updated, an e-mail is sent automatically to the relevant contact.

To access the Support Desktop, click on the **Support** menu.

## Support Screen

| | |
|---|---|
| Add new: | Allows you to make a support request. |
| Origin Date: | The date the support request is sent. |
| User: | The user name of the Spark author who submitted the request. This is only displayed to the Firefly Web Server Administrator. |
| Status: | The current status of the support request (Open/In-progress/Closed). |
| Subject: | The subject of the support request. |
| Action: | Allows you to read (and update) or delete a support request. |

# User desktop

This is provided to Spark users as part of Firefly Web Server. It allows Spark users to run Spark applications and manage their interviews. It can also be branded according to your templates.

The URL for the User Desktop is provided in the 'Example Link' section under Organize Sparks. You can adjust the settings for the User Desktop under the System Settings.

## Available Spark applications Table

This table shows the Spark applications that are available to the Spark user.

| | |
|---|---|
| Name: | The name of the Spark application (the Spark user can click on the name to start the Spark application). The name is set using the Summary Information. |
| Description: | The description of the Spark application. The description is set using the Summary Information. |
| Action: | Allows the Spark user to start the Spark application in the same window (), or in a new window (), depending on your account system settings. |

## Unfinished/Saved/Finished Interviews Table

These tables are only available if the Spark user has logged into the desktop (as a registered user).

| | |
|---|---|
| Last Updated: | The date the interview was last updated. |
| Name: | The name of the interview (the name it was saved under). |
| Spark: | The name of the Spark application which generated the interview. |
| | Allows the Spark user to restart the interview in the current window. |
| | Allows the Spark user to restart the interview in a new browser window. |
| | Allows the Spark user to view the complete audit trail of their interview. |
| | Allows the Spark user to delete the interview. |
| | Allows the Spark user to export the complete audit trail of their interview to Microsoft Word. |
| | Allows the Spark user to export the complete audit trail of their interview to Microsoft Excel. |
| | Allows the Spark user to export the complete audit trail of their interview to HTML. |

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