

# OQ<sup>®</sup> Analyst

Below are the instructions for setting up the OQ Analyst software on a netbook or laptop computer. Please note that the netbook administration will only run on a Windows XP, Vista or 7 based device. If your device runs Windows Mobile or Pocket PC operating system you can use the PDA administration method, or if the device has a browser and an active network connection you can use the Kiosk administration method. See the troubleshooting section for help resolving common issues.

1. Before setting up the device make sure that the system date, time, and timezone are correct by right clicking on the clock at the bottom right and selecting “Adjust date/time”. If the date is not set correctly it may cause the SSL certificate to be rejected or administrations will have the incorrect date.
2. Next make sure that the device can connect to the network using either a wireless network connection or a wired cable. The OQ Analyst software will use the network only when downloading system data or uploading client questionnaires, so you will not need an active network connection when the client is completing the questionnaire. Please consult with your IT or Network Administrator to determine the best method of connecting the device to the network. Also if the device requires a username and password to access the network then you may need to setup the software to use a proxy server (see Application Settings below).
3. The OQ Analyst Netbook software can be downloaded form the following URL:

<https://web.oqanalyst.com/netbook/>

NOTE: please check the version number of the OQ Analyst software (listed at the bottom left after you login to the employee section) to make sure that it matches the version listed on the webpage. If it does not match, then please contact your OQ Analyst system administrator to see where you should download the software from.

Also if you need to setup a large number of devices, you can copy the .options and .data files from a device that has already been setup and overwrite the default files on another device to transfer all of the settings at once. Please contact OQ Measures for assistance if you will be setting up a large number of devices.

4. After the software has been installed to the device, open the OQ Analyst program using the link on the desktop or under the OQ Measures folder of the start menu.
5. Once the OQ Analyst application is open you can setup the application settings (see below) and proxy settings (if needed). Once the settings are correct you can click on “Download System Data” to download information from the server. After downloading system data you can select your agency and then the device is ready to be used to administer questionnaires. See the OQ Analyst Netbook Administration Guide for more information.

NOTE: On Windows 7 and Vista devices the users group account by default is not allowed to make any changes to the program files directory. The OQ Analyst software currently requires access to this folder, so if you are using a Windows 7 or Vista device you may need to grant the users group the modify permission to the “C:\Program Files\OQ Measures\OQ Analyst Netbook Administration” folder. Please contact OQ Measures if you need any assistance.

6. Users must login prior to changing the application settings or before accessing certain sections of the program. If the device has an active network connection you can use any OQ Analyst username and password to authenticate. If an active network connection is not available, simply select the “Use Local Login” option to authenticate against the username and password stored in the device settings.

The default local login username and password are both “oqa”. You can change these or set the local login option as the default under the Security settings page.

### **Application Settings:**

1. Proxy Server Settings: These settings are only required if your network uses a proxy server to connect to the Internet.
  - a. The Proxy Server Address should be the IP Address, Domain Name or Machine name of the proxy server. If you need to specify an alternate port number add “:PORT” to the end. For example, if your proxy server was located at 10.0.0.100 and used port 80 you would enter “10.0.0.100:80”.
  - b. If your proxy server requires a username and password, select the “Use Proxy Authentication” option and enter the required information. The Domain option should be left blank unless required by your proxy server.
2. OQA Server Settings: These settings specify the OQ Analyst server address, connection timeout, and SSL Encryption settings. These settings will be provided by your system administrator.
3. Agency Settings: This page is used to select which agency the device is assigned to and must be configured before you can administer any questionnaires. The Proxy Server and OQA Server settings must be configured first, and then you must download system data before you can select your agency.
4. Misc Settings: This page is used to setup which actions require a login (Upload, Review, or Administer Questionnaires) and to set the Local Login username and password for this device. Select “Use Local Login” to change the username and password. If this option remains checked, the local login will be used by default, otherwise the remote login will be used by default. Users always have the option to select “Use Local Login” from the login screen to switch between remote and local authentication.

### **Troubleshooting steps:**

1. The first troubleshooting step whenever there are any issues with the device is to try restarting the computer to clear out any memory resident programs and reset the operating system. To reset the device simply press the power button or select the restart option from the start menu. If the device has locked up and is not responding you can try holding down the power button for 10 seconds to force it to turn off.
2. Next make sure that all of the settings in the OQ Analyst program are correct using the settings menu at the top:

- a. OQA Server
    - i. Server Name: <Provided by your System Administrator>
    - ii. Connection Timeout: 10 seconds
    - iii. Use SSL Encryption: <Provided by your System Administrator>
  - b. Agency: Select your agency from the list
  - c. Proxy Server  
Only use these settings if your network requires use of a proxy server. Leave the username, password, and domain box blank if they are not required.
3. If the settings are correct then test to see if the device can connect to the OQ Analyst server by using Internet Explorer. After the device is connected to the network, open Internet explorer and browse to the login address for your software. If this page does not come up, try browsing to it from a desktop computer to make sure that the web site is working correctly. You can try other sites such as google.com or yahoo.com as well to make sure that the connection is working. The device will only require access to the OQA Server website, and the application will communicate using standard port 443 for HTTPS traffic or 80 for HTTP traffic.

NOTE: if the device prompts you for a username and password after opening Internet Explorer but before it allows you to connect to the network, then you may have to setup a proxy server in the OQ Analyst Netbook software. Please contact your IT or Network Administrator for more information.

4. Once you know that the network connection is working, you can then view any error messages from the OQ Analyst program by opening File Explorer on the device and browsing to the “C:\Program Files\OQ Measures\OQ Analyst Netbook Administration” directory. On an x64 based system you would browse to “C:\Program Files (x86)” instead of “C:\Program Files”.
5. If there are problems loading the program, make sure that you have the .NET Framework version 3.5 installed. If there is an error message after changing the settings or trying to save a questionnaire, make sure that the users account group has modify permissions for the program directory (see step 5 on page 1)
6. If you continue to have problems and have determined that it is not a communication issue we may request that you send a copy of the Program Files -> OQ Analyst Netbook Administration folder to our support staff so that we can analyze the data and configuration files. You can copy the files to another computer and then zip them up into an archive and send them to the address listed below. Please delete the Netbook.exe file from the archive before sending it, as our email servers will reject any archives that contain executables. Also please include a brief summary of your problem and the steps already taken to troubleshoot the issue.

### **Securing the device:**

There are many ways to restrict user access on the device to prevent clients from browsing the web or playing games. The most common technique is to use Active Directory and Group Policy to lock down the device, but there are also 3<sup>rd</sup> party applications that can be used to restrict access on the machine. If you would like more information please contact OQ Measures.

If you have any other problems or would like more information please contact OQ Measures via email [Support@OQMeasures.com](mailto:Support@OQMeasures.com) or phone (801) 649-5449.