Client Collaboration and Instrument Testing Using MS Server 2008 and Terminal Services

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Introduction

- How UWSC enabled our clients to be involved in instrument testing and debugging in the past.
- Evolution into a system allowing clients to remotely test CATI & CAPI instruments.
- Cloud computing has led people to expect ubiquitous access to resources.
- Clients want to test instruments from any location at any time.
Why?

- Rigorous testing and debugging is a key part of the instrument development process
- UWSC conducting more complex surveys
- Clients’ participation and feedback is important
  - It’s got to be easy
In the past

- Install CASES software and instruments on clients’ PCs or servers
- Made things easy for clients
- But difficult for us:
  - Possible restrictions on software installed on client PCs
  - Coordinate with client IT staff for server installs
  - Support and updates were difficult
1 year ago - a new and improved solution required

- Wisconsin Longitudinal Survey 2010
  - Nationwide CAPI
  - 24 investigators around the world
  - Need a new model
  - Must be hosted by UWSC
Requirements

• Support CASES
• Easy for clients to use
• Low implementation and administration costs
Possible Solution

• Add new Novell OES server with Teaming and Conferencing
  • Pros
    • Stable and reliable OS
    • Teaming and Conferencing provide remote access
  • Cons
    • Future CASES compatibility (OES is Linux-based)
    • Expensive add-on components
    • New administration tools
Solution

- MS Server 2008
  - CASES-compatible
  - Easy for clients to use via Terminal Services
    - Clients can connect remotely with native OS clients or through a browser
  - Very inexpensive in university environment ($300 per server license plus $16 per CAL)
  - Initially ran on a spare workstation
  - A few months of network admin time
Features

• Test instruments available to any user with a browser and a network connection
• 24/7 availability
• Instruments routinely updated from development server
• Bug database connectivity
• Internal debuggers and clients see same version
• Severely restrict user rights on server
• Support costs are minimal
Testing Server Desktop via RDP
Testing Server Desktop Web Access
Today

- Success
  - Small client learning curve
  - Multiple projects hosted
  - Clients are happy
  - UWSC staff are happy
  - A nice service for UWSC to offer
Tomorrow and Beyond

• The future
  • Plan to virtualize it and move it to server class hardware
  • Make more use of SharePoint
  • Continue to investigate and deploy new tools for clients
Thank You

Questions?

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