

Surveys

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Overview

Surveys allow for the collection of ad-hoc data within the overall structure of Waltz. Surveys are focused on a specific entity type (e.g. APPLICATION, CHANGE_INITIATIVE) and issued to users matching a given set of roles describing their involvement with the entity. The set of target entities for the survey is derived from a Waltz selection mechanism (e.g. apps under a specific organisational unit, apps performing a specific function etc).

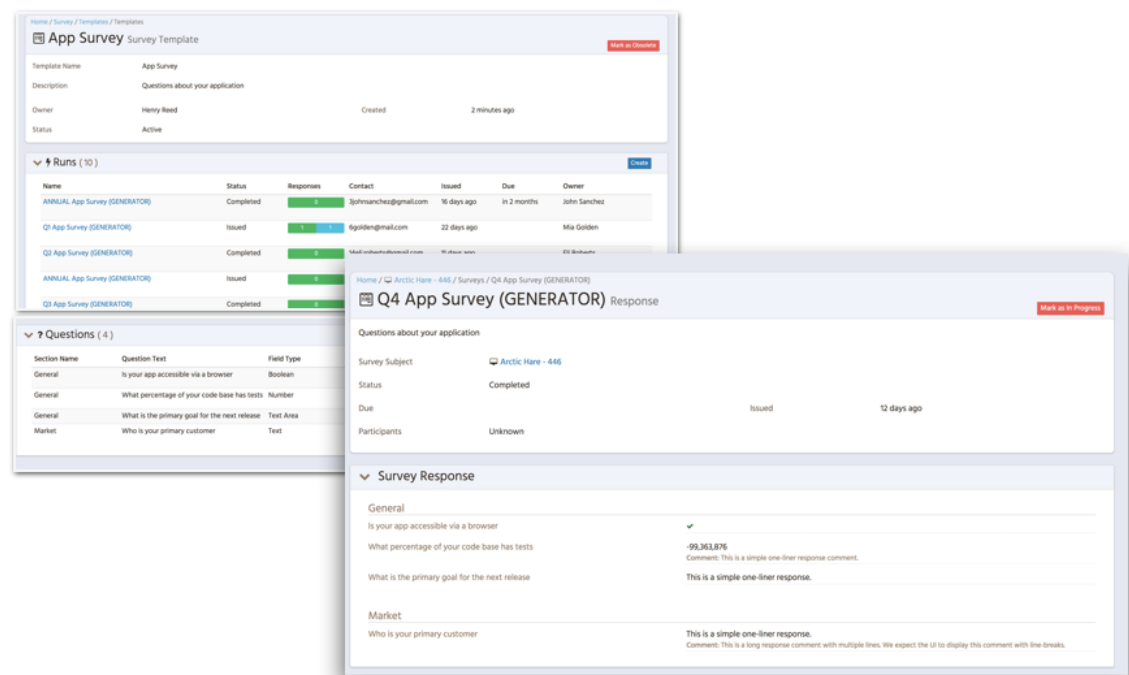


Figure 1. Survey screenshots (management and view)

Figure 2. Survey screenshots (editing)

Survey Instance Lifecycle

A survey can be issued via the **Surveys** section on the navigation bar for the related entity type, provided there is an existing survey template. Alternatively, these can be issued in bulk via a 'Survey Run' by a 'Survey Admin'.

Survey Owners have the ability to: - **WITHDRAW** a survey at any stage, unless **COMPLETED** or **APPROVED**. - **APPROVE** or **REJECT** a survey once completed. - Change the 'Due' date. - Assign other recipients.

Survey recipients have the ability to: - Edit the survey response. - Assign other recipients.

If a **COMPLETED** or **WITHDRAWN** survey is reopened, or if a survey is **REJECTED**, the version number will increase.

The diagram below show the state transition diagram for surveys. Green transitions indicate actions that may be performed by participants and/or survey administrators. Transitions restricted to survey administrators are red.

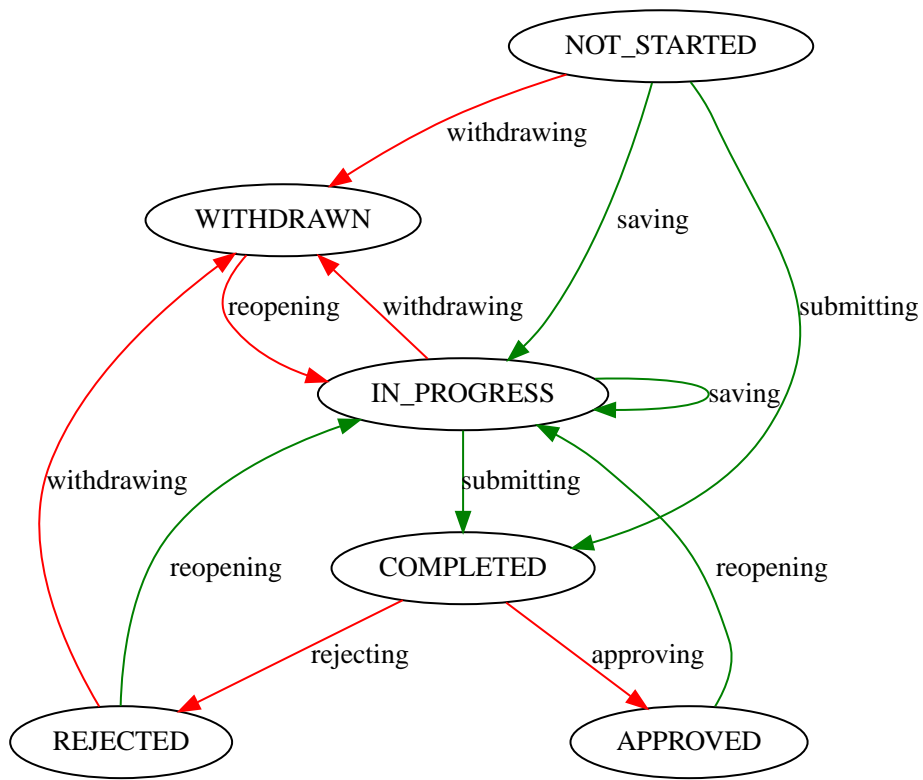


Figure 3. State transition diagram

Model

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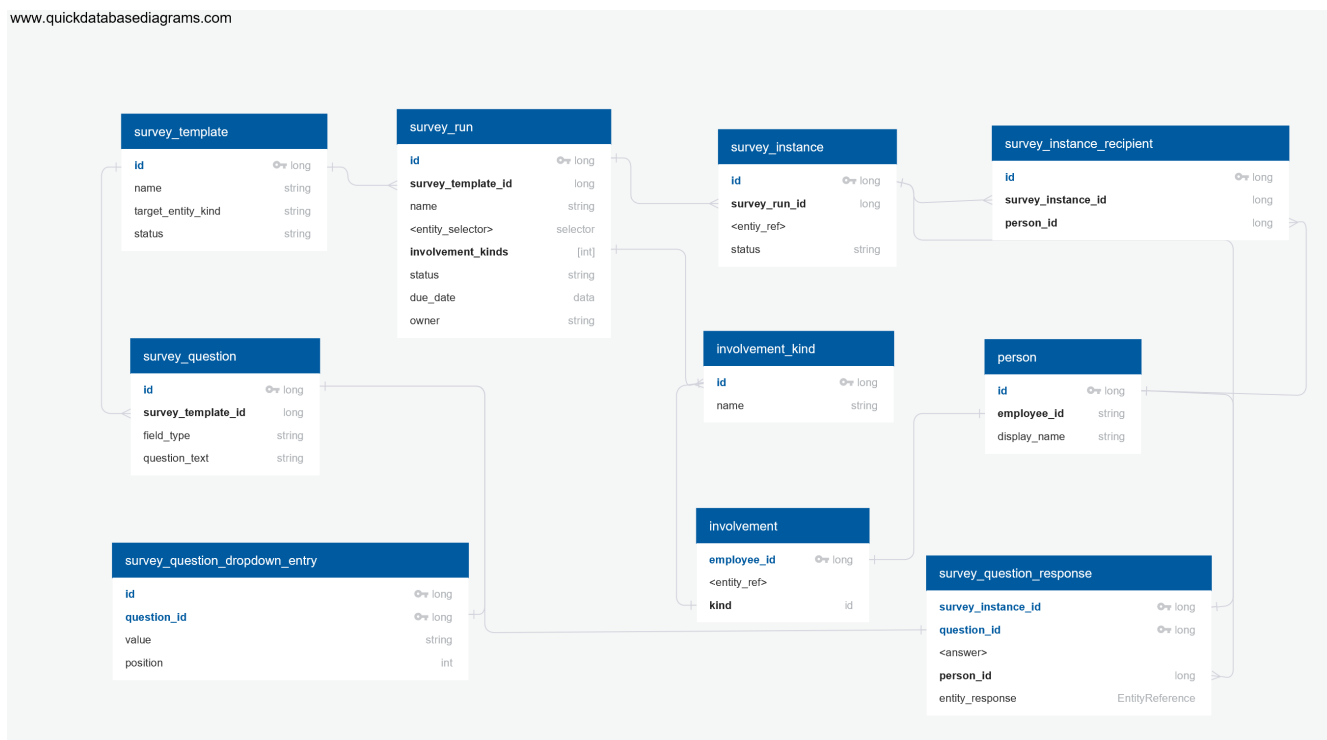


Figure 4. Schema model

[Source](#)

Survey Templates

Survey templates are collection of survey questions for a specific target entity kind. Survey templates can be created by 'Survey Admin' in the **Surveys** section in the menu dropdown bar. Survey runs are created based on a survey template.