Creating and Administering Surveys

ServiceNow

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Introduction

Surveys

Note: *This article applies to Fuji and earlier releases. For more current information, see Get Started with Survey Management* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.'**

Overview

Collect user opinion data for continual service improvement using the following survey functionality:

- Base system surveys with Best Practice - Task Survey Management - Define notification conditions and configure survey options without scripting.
- Survey Wizard - Create surveys using wizards. Advantages include dynamic options and multiple page surveys.

Note: *A significantly improved and updated feature named Survey Management is available starting with the Eureka release. Survey components from previous versions are available in legacy modules and can be migrated.*

Recording Survey Responses

By default, only one response per user for each survey is recorded. If a user retakes a survey, the new response overwrites the previous response. To disable this behavior for public (anonymous user) surveys, see Sending Public Surveys via Email.

This behavior does not apply to survey wizards. To learn more about public survey wizards, see Making a Wizard Public.

Setup Procedure

To set up surveys:

1. Create the survey questions and response choices.
2. Configure the survey properties. Survey properties control how the survey conditions are used. This includes selecting the repeat interval for sending the same type of survey to the same user.
3. Create a survey condition that controls how often a survey can be sent to a particular user and defines the conditions that trigger a survey.
4. Create the email notification needed to deliver the survey.
5. Optionally, make the survey public to enable users to access the survey from the welcome page without having to log in to the instance.

References

[1] https://docs.servicenow.com/bundle/jakarta-it-service-management/page/administer/survey-administration/concept/c_SurveyManagement.html

Best Practice - Task Survey Management

Overview

The Best Practice - Task Survey Management feature:

- Automates tasks involved in conducting customer satisfaction surveys.
- Includes sample survey reports.
- Defines randomization controls without requiring survey creators to create a business rule.

The Best Practice - Task Survey Management plugin is active by default in the base system.

Note: *A significantly improved and updated feature named Survey Management is available starting with the Eureka release. Survey components from previous versions are available in legacy modules and can be migrated.*

Reporting

Survey results are associated with service request task data through the Task Survey [task_survey] table, allowing for ITIL standard satisfaction and survey response rate reports.

- To create advanced reports on survey response and task data, use the Task survey detail [task_survey_detail] database view table.
- To view sample reports, navigate to the appropriate location for your version:
  - Eureka release or later: **Survey Management > Legacy Surveys > Overview**
  - Dublin release or earlier: **Survey > Overview**

  To learn more, see Task Survey Management Reports.

Included with the Plugin

Database Table Structure

New Fields

Survey Response [survey_response] table: The following fields were added to this table to convert question responses to string or integer. Both fields are populated by the **Update Answers for Reporting** business rule.

Field	Input Value
answer	A string field for reporting on string response values.
answer_integer	An integer field for reporting on number response values.

New Tables

Survey Conditions [survey_conditions] table: This table defines how to send surveys based on task conditions.

Field	Input Value
active	A boolean field used to enable/disable this condition check.
description	An informational string field for identifying the condition.
survey	Refers to *survey_master* and defines which survey to send if the condition is met.
condition	The condition field dependant on the **table** field. This field is used to look up a task's survey.
table	The **table_name** type field that lists all task related tables. The table works with the condition to look up a task's possible survey.
random_survey	A boolean field that initiates random surveys when this condition is *true*.
percent_random	An integer field used when **random_survey** is *true*. Use this field for a rough estimate of how often a matching task generates a survey.
order	An integer field used to define the lookup priority. The lowest order matching condition is selected during lookup.
user_field	The **field_name** type field is dependent on the **table** field and is used to select the field that defines the survey recipient in the **user_field**. This is limited to selecting **sys_user** reference fields.
repeat_interval	Number of days to wait before sending the defined survey to the same user. This overrides the global property setting, glide.task.survey_days_wait.

Task Survey [task_survey] table: This table is used for the linking relationship between a task and a survey request.

Field	Input Value
task	A reference field to the Task [task] table.
survey	A reference field to the Survey [survey_master] table, naming the requested survey.
instance	A reference field to the Survey Instance [survey_instance] table, naming the completed survey.
sent_to	A reference field to the User [sys_user] table, naming the recipient of the survey.
taken_by	A reference field to the User [sys_user] table, naming the individual who completed survey.
requested_date	The glide_date_time field for tracking the date when the survey was requested.
completed_date	The glide_date_time field for tracking the survey completion date and time.
state	A choice field showing **requested** or **completed** states.

Database View

task_survey_detail: This database view enables advanced reporting on task-related survey responses. This view merges the Survey Response [survey_response, Survey Instance [survey_instance], Task Survey [task_survey], and Task [task] tables. This view is used in the sample report *Service Desk Technician Competency 90 Day Average*.

Business Rules

The following business rules are included with Task Survey Mangement.

- **task survey events**: Runs an update of tasks and checks the survey conditions table to see if a survey related to this task should be sent.
- **Update Answers for Reporting**: Copies default survey responses to a new string or integer field.

Modules

The following modules are included with Task Survey Management:

- **Overview**: Links to the Survey Overview homepage with sample gauges.
- **Task Surveys**: Displays a view of task survey records.
- **Survey Conditions**: Displays a list view of survey condition records.
- **Survey Properties**: Opens the survey properties page.

Reports

See the Task Survey Management Reports page for details.

Properties

Name	Display text in Survey Properties module	Description
glide.task.survey_active	Enable the enhanced task survey capabilities. Survey distribution is controlled by Survey Conditions.	Enables or disables survey condition checking.
glide.task.survey_send_all	Enabling this forces all matching survey conditions to trigger surveys. Default is disabled which will find the first matching condition and stop checking.	Determines if all survey condition matches are processed or only the first match, based on condition order.
glide.task.survey_days_wait	How many days should we wait before sending the same survey type to the same user?	Use this property to prevent the same survey from being sent to the same user within a defined number of days.

Other

Demo data: Sample survey and questions are included. These surveys are ready to use, or you can customize them to meet your needs.

Event: A new event called `task.send_survey` was registered to trigger survey related email notifications from the **task survey events** business rule.

Email Notifications: Three sample email notifications were added to send the survey link to users, one for each of the Incident [incident], Change Request [change_request], and Request [sc_request] tables.

Database Views: A new database view is included to enable advanced reporting on task related survey responses. This view merges the Survey Response [survey_response], Survey Instance [survey_instance], and Task [task] tables. This is used in the sample report **Service Desk Survey Tech Avg Rating** to show the average rating by technician assigned to the related task.

Security: See a detailed discussion in Survey Security.

Survey Security

Overview

This article describes the security components that are included with Best Practice - Task Survey Management.

Note: *A significantly improved and updated feature named Survey Management is available starting with the Eureka release. Survey components from previous versions are available in legacy modules and can be migrated.*

Roles

The following user roles are included:

- **survey_admin:** Administration of survey masters, questions, instances, task surveys, and task survey details. This role contains the assessment_admin role starting with the Eureka release.
- **survey_reader:** Read access to instances, task surveys, and task survey details.

Access Controls

The following security rules (ACL) are included:

Table	Operation	Roles or Access Script
survey_conditions	write	survey_admin role
survey_conditions	delete	survey_admin role
survey_instance	read	Any of these conditions are true • current.isNewRecord() • current.taken_by == gs.getUserID() • gs.hasRole('survey_reader') • gs.hasRole('survey_admin')
survey_instance	delete	survey_admin role
survey_master	write	survey_admin role
survey_master	delete	survey_admin role
survey_question_new	write	survey_admin role
survey_question_new	delete	survey_admin role
survey_response	read	Any of these conditions are true • current.isNewRecord() • current.taken_by == gs.getUserID() • gs.hasRole('survey_reader') • gs.hasRole('survey_admin')
survey_response	delete	survey_admin role
task_survey	delete	survey_admin role

task_survey	read	Any of these conditions are true • current.isNewRecord() • current.taken_by == gs.getUserID() • gs.hasRole('survey_reader') • gs.hasRole('survey_admin')
task_survey_detail	read	survey_admin or survey_reader role

Survey Wizards

Note: *This article applies to Fuji and earlier releases. For more current information, see Survey Words* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.**

Overview

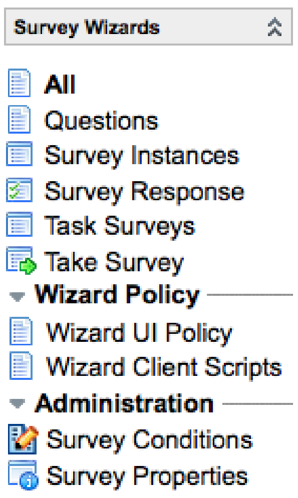
The Survey Wizard plugin creates surveys using wizards. Advantages versus other survey functionality include the ability to:

- Ask different questions based on responses (dynamic surveys)
- Create multiple page surveys
- Record answers for partially completed surveys

This plugin integrates with the Best Practice - Task Survey Management plugin.

Application & Modules

The **Survey Wizards** application is added to the application navigator, with modules for managing survey wizards:



Survey Wizard application

- **All** - *Survey Wizards* table; stores all survey wizards.
- **Questions** - displays wizard variables that are associated with survey wizards.
- **Survey Instances** - *Survey Instance* table; maintains a record for each completed survey. The plugin modifies this table to track survey wizards along with surveys.
- **Survey Response** - *Survey Responses* table; stores all responses to survey and survey wizard questions.
- **Task Surveys** - *Task Surveys* table; defines the relationship between a task and survey request. The plugin modifies this table to track when survey and survey wizard request are sent.
- **Wizard UI Policy and Client Scripts** - create dynamic effects and validation for survey wizards.
- **Survey Conditions** - *Survey Conditions* table; defines how to send surveys based on task conditions. The plugin modifies this table to determine whether a survey or survey wizard is sent when conditions are met.
- **Survey Properties** - survey wizards use the same properties as surveys.

Requesting the Plugin

Before activating this plugin, consider the installed components, dependencies, and impact.

- **Installed Components** - fields, tables, a business rule, a script include, an application, a survey wizard panel, and demo data (optional). For more details, see Installed Components.
- **Dependencies** - Best Practice - Task Survey Management (active by default)
- **Impact** - adds fields to existing tables, installs the Best Practice - Task Survey Management plugin, and modifies the Task Survey Events business rule. You may choose to install a demo survey with the plugin. The plugin integrates with standard survey functionality, so there is no need to transition existing surveys to survey wizards. However, survey administrators must specify a type (survey or survey wizard) for new survey conditions.

Click the plus to expand instructions for requesting a plugin.

1. Navigate to [HI [2]].
2. Click **Service Catalog**.
3. Click **Request Plugin Activation**.
   - [Required] In **Target Instance**, select the instance on which to activate the plugin.
   - [Required] In **Plugin Name**, enter the name of the plugin to activate.
   - [Optional] In **Date and time would you like the plugin to be enabled?**, specify a date and time at least 12 hours in the future. Leave this field empty if you want the plugin activated as soon as possible.

   Note: Plugins are generally activated during business hours in the Pacific time zone, but can be scheduled for a different time with advance notice.

   - [Optional] In **Reason/Comments**, add any information that would be helpful for the ServiceNow technical support engineer activating the plugin.
4. Click **Submit**.

Installed Components

New Fields

The following tables are modified:

Display Name (Table Name)	Modification
Survey Conditions (survey_conditions)	Add fields to determine which survey is sent when conditions are met: • Type - either a survey or survey wizard • Survey_wizard - reference to applicable survey wizard
Task Survey (task_survey)	Add fields to track which surveys were sent to users: • Type - either a survey or survey wizard • Survey_wizard - reference to applicable survey wizard
Survey Instance (survey_instance)	Add fields to track survey wizard instances along with surveys.
Wizard (expert)	Add field to support new survey wizard table.

New Tables

The following tables are added:

Display Name (Table Name)	Description
Survey Panel (expert_panel_survey)	Adds a survey panel to wizards. Extends the expert_panel table.
Survey Wizard (expert_survey)	Stores survey wizards. Extends expert.

Script Include

The **SurveyUtils** script include is added to record responses during survey panel transitions.

Business Rule

The **Task Survey Events** business rule is modified to include logic for sending survey wizards. Customers who have modified this business rule can not install the updated version automatically.

For information about the link generated from the business rule script, see Survey Wizard - Multiple Instances [3] on the ServiceNow Community.

Wizard Panel

The plugin adds **Survey** as a new type of wizard panel. Survey wizards are created using survey panels.

Survey wizard responses are saved when the user navigates between survey panels (clicks **Next** or **Previous**), as opposed to saving responses only at the end (surveys). This feature allows a logged in user to resume a survey that is in progress and allows survey readers to collect response data for partially completed surveys. To support the ability to resume surveys in progress, survey wizard answers are also temporarily stored in XML in the *expert_instance* table. When the user clicks **Done** on the last panel of the survey wizard, the record in the *expert_instance* table is deleted.

For information about having more than one instance of a given Wizard in play at a time, see Survey Wizard - Multiple Instances [3] on the ServiceNow Community.

Demo Data

Demo data is available with this plugin. If you choose to install demo data, a sample survey wizard, called *Customer Satisfaction Survey*, is added to the database.

Creating a Survey Wizard

The following steps provide an overview of building a survey wizard. To build a sample survey wizard, see Creating a Survey Wizard (Demo).

Step 1. Create the Survey Wizard

Create the survey wizard:

1. Activate the Survey Wizard plugin, if necessary.
2. Navigate to **Survey Wizards** > **All**.
3. Click **New**.
4. Enter the survey wizard **Name**.
5. In the **Roles** field, add the *public* role.

6. Right-click the header and select **Save**.

Step 2. Define Questions

Define survey questions (wizard variables):

1. In the **Wizard Variable** related list, click **New**.
2. Enter the variable details.
3. In the **Read roles** field, add the *public* role.

   Configure the form to add the **Read roles** field, if necessary.
4. Click **Submit**.
5. Repeat steps 1 – 4 for all questions in the survey.

Note: *To learn more, see Defining Wizard Variables.*

Step 3. Create Pages

Create the survey pages (wizard panels) and add questions:

1. Navigate to **Survey Wizards** > **All** and open the survey wizard.
2. In the **Survey Panels** related list, click **New**.
3. Enter the **Name**, **Title**, and **Description**.
4. Right-click the header and select **Save**.
5. In the **Variables** related list, click **Edit...**.
6. Using the slushbucket, select and arrange survey questions on the panel.
7. Repeat steps 1 – 6 for each page of the survey wizard.

Note: *To learn more, see Wizard Panels.*

Step 4. (Optional) Create Dynamic Effects

Create dynamic effects, such as hiding or showing fields on a panel based on answers:

1. Navigate to **Survey Wizards** > **Wizard Policy** >
   - **Wizard UI Policy** or
   - **Wizard Client Scripts**.
2. Click **New**.
3. Enter the UI policy or client script details.

Note: *To learn more, see Wizard UI Policy and Client Scripts.*

Step 5. Define Transitions

Transitions define the logic used to move between pages (wizard panels) in a survey. Use panels and transition logic to implement multiple page surveys and dynamic effects, such as skipping pages based on answers.

Define transitions:

1. Navigate to **Survey Wizards** > **All** and open the survey wizard.
2. Open a survey panel.
3. In the **Wizard Panel Transitions** related list, click **New**.
4. Enter the transition details and click **Submit**.
5. Repeat steps 1 – 4 for all transitions between pages in the survey wizard.

Note: *To learn more, see Wizard Transitions.*

Step 6. Test the Survey Wizard

Test the survey wizard:

1. Navigate to **Survey Wizards** > **All** and open the survey wizard.
2. Click **Try it**.
3. Answer survey questions and verify the transition logic based on answers, if applicable.
4. At survey completion, click **Done**.
5. Navigate to **Survey Wizards** > **Survey Instances**.
6. Search for and open the most recent instance of the survey wizard.
7. Verify that your survey answers are properly recorded.
8. Run through several scenarios to test transition logic and data collection.

Step 7. Configure the Survey

1. Configure the survey properties (apply to all survey wizards and surveys):
   1. Navigate to **Survey Wizards** > **Survey Properties**.
   2. Ensure the **Enable the enhanced task survey capabilities. Survey distribution is controlled by Survey Conditions.** property is enabled (select the check box).
2. Create a survey condition that controls when and to whom the survey wizard is sent:
   1. Navigate to **Survey Wizards** > **Survey Conditions**.
   2. Click **New**.
   3. Select a **Type** of *Survey Wizard*. Only a survey or survey wizard is sent (determined by **Type**), even if both are defined for the condition.
   4. Enter the condition details.
   5. Click **Submit**.
3. Create the email notification that delivers the survey wizard:
   1. Navigate to **System Policy** > **Email** > **Notifications**.
   2. Filter the list to view notifications with an **Event Name** of *task.send_survey*, which is the event that is triggered when survey conditions are met.
   3. Open a survey notification in the filtered list or click **New**.
   4. Enter the email notification details. If you are creating a new notification, be sure to adjust conditions and weight to avoid conflicts with existing survey notifications (**Event Name** of *task.send_survey*).
   5. Click **Update** or **Submit**.

Note: *To learn more, see Surveys.*

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/administer/wizards/concept/c_SurveyWizards.html
[2] http://hi.service-now.com
[3] https://community.servicenow.com/message/681399#681399

Survey Setup

Creating a Survey

Note: *This article applies to Fuji and earlier releases. For more current information, see Survey Administration* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated. Visit** http://docs.servicenow.com **for the latest product documentation.'**

Overview

The first task in creating and administering a survey is to create the survey questions and the type of answers to allow.

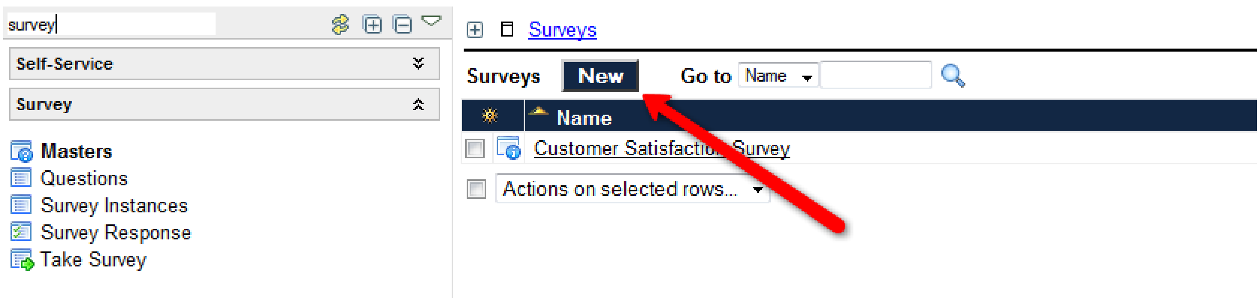
- To create a survey using base system functionality, complete the procedure described in this article.
- To create a survey using wizards, see Survey Wizards.

When you have completed this step, go to the next task for the version of ServiceNow that you are using.

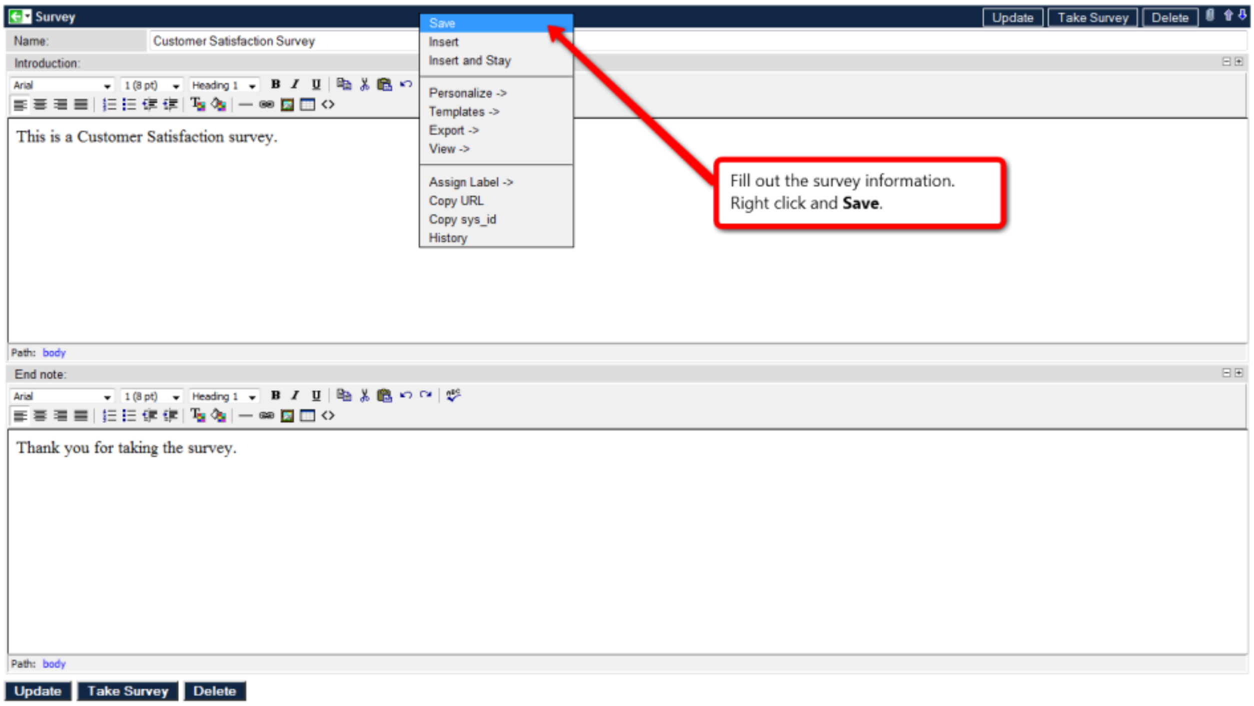
Note: *A significantly improved and updated feature named Survey Management is available starting with the Eureka release. Survey components from previous versions are available in legacy modules and can be migrated.*

Step 1: Create the survey

1. Navigate to the appropriate location for your version:
   - Eureka release or later: **Survey Management > Legacy Surveys > Masters**
   - Dublin release or earlier: **Survey > Masters**
2. In the list of surveys, click **New** to create a new survey, or open an existing survey.



3. Fill out the survey information, right-click the header bar, and select **Save** from the popup menu.
   - **Name**: Name of the survey.
   - **Introduction**: This will appear at the top of the survey.
   - **End Note**: This will appear after having completed the survey.



Note: *It is not possible to pass dynamically generated data within the end-note. The end note of the survey consists of static information only.*

Step 2: Add Questions to the Survey

The **Questions** related list appears at the bottom of the survey form after the form is saved. The related list is labeled **Survey Questions** starting with the Dublin release. Click **New** to add questions to the survey.

Fill out the question information and save.

- **Question**: The question you want displayed.
- **Type**: The question type.

  Note that some question types require choices.
- **Default Value**: Displayed default value.

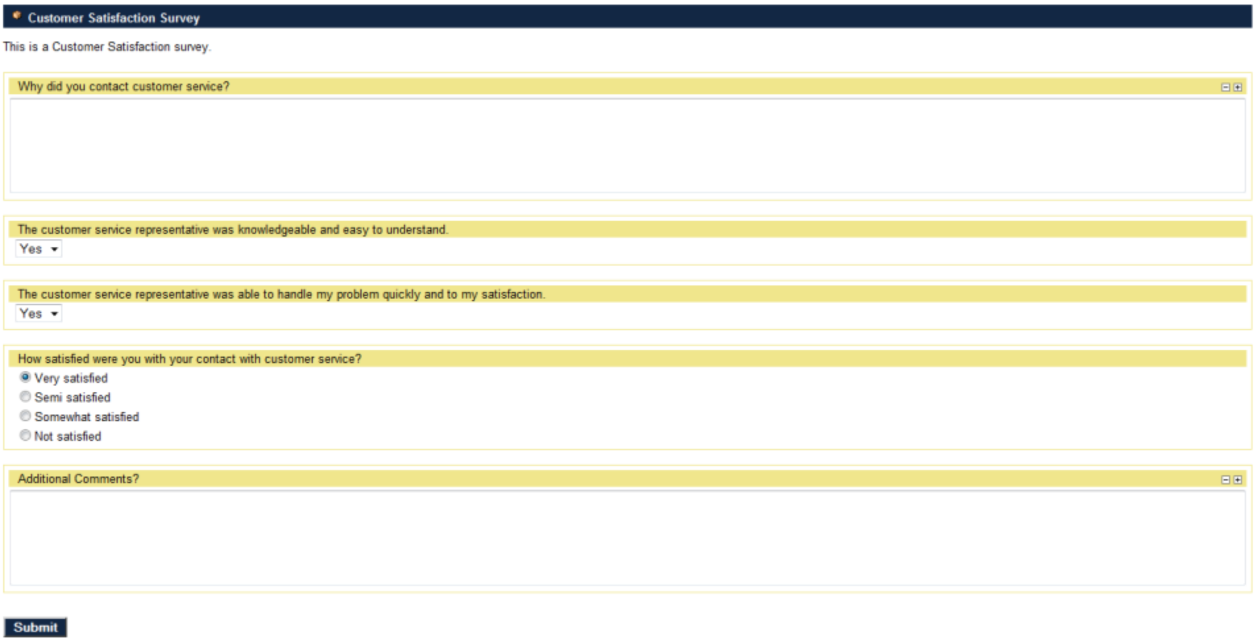
On the question record, click **New** in the **Question Choices** related list. Fill in the **Text** and **Value** for the choice.

To require that the user answers the question, configure the form to add the **Mandatory** field and then select the **Mandatory** check box.

Step 3: View the Survey

1. Navigate to the appropriate location for your version:
   - Eureka release or later: **Survey Management > Legacy Surveys > Masters**
   - Dublin release or earlier: **Survey > Masters**
2. Select the survey you want to view.
3. Click **Take Survey**.

   See the following example of a survey.



Advanced Customization of Survey Pages

Administrators can customize survey pages by modifying script includes and UI pages. The UI pages **survey_take** and **survey_thanks** control the rendering of the survey question and submitted pages. The *SurveyProcessor* script include contains most of the logic that processes the survey responses when they are submitted.

Enabling Scripts in the Introduction

By default, scripts in the survey **Introduction** are escaped automatically. To enable script in the introduction, make the following changes:

1. Navigate to **System UI > UI Pages** and select **survey_take**.
2. Find the line `$[NS:gr.introduction.getDisplayValue()]` and replace it with `$[gr.introduction.getDisplayValue()]`
3. Navigate to **sys_properties.list** and create a new property named **glide.html.escape_script**.
4. Set the new property to **false**.

   Scripts can then be evaluated properly in the survey **Introduction**.

What do I do Next?

The next step is to configure the survey properties.

References

[1] https://docs.servicenow.com/bundle/jakarta-it-service-management/page/administer/survey-administration/reference/r_SurveyManagementLandingPage.html

Creating a Survey Wizard (Demo)

Note: *This article applies to Fuji. For more current information, see Create a Survey Wizard (demo)* [1] *at* http://docs.servicenow.com The ServiceNow Wiki is no longer being updated. Please refer to http://docs.servicenow.com for the latest product documentation.

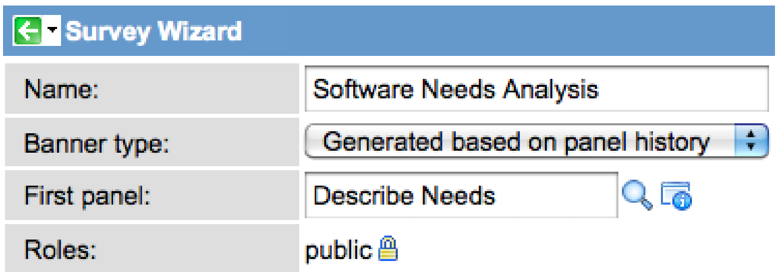
Overview

This example creates a survey using a survey wizard (requires the Survey Wizard plugin). The survey uses dynamic features that are available using wizards.

Step 1. Create the Survey Wizard

Create the survey wizard:

1. Activate the Survey Wizard plugin, if necessary.
2. Navigate to **Survey Wizards** > **All**.
3. Click **New**.
4. In the **Name** field, enter *Software Needs Analysis*.
5. In the **Roles** field, add the *public* role.
6. Right-click the header and select **Save**.



***Software Needs Analysis* survey wizard**

Step 2. Define Questions

Define survey questions (wizard variables):

1. In the **Wizard Variable** related list, click **New**.
2. Enter the variable details as listed in the table.
3. In the **Read roles** field, add the *public* role.

   Configure the form to add the **Read roles** field, if necessary.
4. Click **Submit**.
5. Repeat steps 1 – 4 for all variables in the table.

-- Wizard Variables Details Table --

Type	Name	Question	Additional configuration
CheckBox	office	Microsoft Office Suite	
CheckBox	creativesuite	Adobe Creative Suite	
CheckBox	other	Other	
Label	needs	Business software you use (select all that apply):	
Single Line Text	otherprod	Please specify:	
Numeric Scale	powerpoint	PowerPoint	**Scale min**: 1
Numeric Scale	word	Word	**Scale min**: 1
Numeric Scale	excel	Excel	**Scale min**: 1
Numeric Scale	publisher	Publisher	**Scale min**: 1
Numeric Scale	access	Access	**Scale min**: 1
Yes/No	photoshop	Photoshop	**Default value**: No
Yes/No	illustrator	Illustrator	**Default value**: No
Yes/No	acrobat	Acrobat	**Default value**: No
Yes/No	dreamweaver	Dreamweaver	**Default value**: No
Multi Line Text	project_description	Describe projects for which you use these tools:	**Mandatory**: true

Step 3. Create Pages

Create the survey pages (wizard panels) and add questions:

1. Navigate to **Survey Wizards** > **All** and select **Software Needs Analysis**.
2. In the **Survey Panels** related list, click **New**.
3. Enter the **Name**, **Title**, and **Description** as listed in the table.
4. Right-click the header and select **Save**.
5. In the **Variables** related list, click **Edit...**.
6. Using the slushbucket, select and arrange the variables as listed in the table.
7. Repeat steps 1 – 6 for all panels in the table.

-- Panel Variables Table --

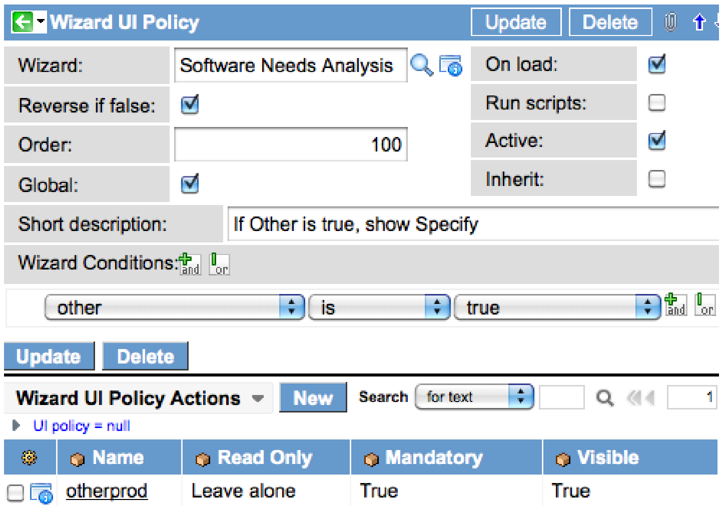
Name & Title	Description	Add variables
Describe Needs	Please complete this survey to help us evaluate our ongoing software needs.	Business software you use (select all that apply): Microsoft Office Suite Adobe Creative Suite Other Please specify:
Microsoft Office	Please rate the importance of each program to your job, using a scale from 1 to 5 (1 = not important, 5 = very important):	Word PowerPoint Excel Publisher Access

Adobe Creative Suite	Have you used these programs?	Acrobat Illustrator Photoshop Dreamweaver Describe projects for which you use these tools:
End Note	Thanks for completing our survey. To order new or upgraded software, visit the service catalog.	

Step 4. Create Dynamic Effects

On the **Describe Needs** panel, if the user selects **Other**, then the **Please specify** field should be visible and mandatory. To create this dynamic effect:

1. Navigate to **Survey Wizards > Wizard Policy > Wizard UI Policy**.
2. Click **New**.
3. Enter the UI policy details.
    - **Wizard**: *Software Needs Analysis*
    - **Reverse if false**: select the check box
    - **On load**: select the check box
    - **Active**: select the check box
    - **Short description**: *If Other is true, show Specify*
    - **Wizard Conditions**: *other is true*
4. Right-click the header and select **Save**.
5. In the **Wizard UI Policy Actions** related list, click **New**.



Wizard UI Policy

6. Enter the action details and click **Update**.
    - **Variable Name**: *otherprod*
    - **Mandatory**: *True*
    - **Visible**: *True*

Step 5. Define Transitions

Define transitions:

1. Navigate to **Survey Wizards > All** and select **Software Needs Analysis**.
2. Open a survey panel as listed in the table.
3. In the **Wizard Panel Transitions** related list, click **New**.
4. Enter the transition details and click **Submit**.
5. Repeat steps 1 – 4 for all panel transitions in the table.

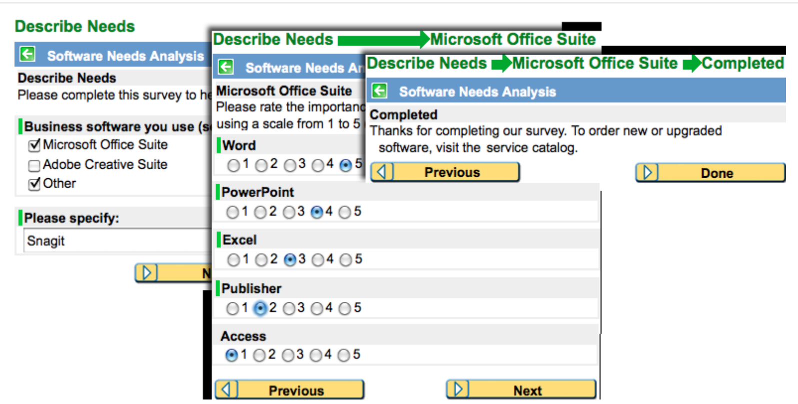
-- Panel Transition Details Table --

Panel	Condition	Order	To
Describe Needs	office is true	100	Microsoft Office
Describe Needs	creativesuite is true	200	Adobe Creative Suite
Describe Needs		300	End Note
Microsoft Office	creativesuite is true	100	Adobe Creative Suite
Microsoft Office		200	End Note
Adobe Creative Suite		100	End Note

Step 6. Test the Survey Wizard

Test the survey wizard:

1. Navigate to **Survey Wizards** > **All** and select **Software Needs Analysis**.
2. Click **Try It**.
3. In the **Business software you use (select all that apply)** question, select: *Microsoft Office*, *Other*.
4. Verify that the **Please specify** field appears and is mandatory when *Other* is selected (UI policy created in step 4).
5. Click **Next**.
6. Verify that the **Microsoft Office** panel appears.
7. Enter test values for the questions and click **Next**.
8. Verify that the **End Note** panel appears (the transition logic skips the **Adobe Creative Suite** panel when the **Adobe Creative Suite** check box is not selected on the first panel).
9. Click **Done**.
10. Navigate to **Survey Wizards** > **Survey Instances**.
11. Search for and open the most recent instance of the **Software Needs Analysis** survey wizard.
12. Verify that your survey answers are properly recorded.
13. Run through several scenarios to test transition logic and data collection.



Test the Survey Wizard

Step 7. Configure the Survey

Configure the survey:

1. Navigate to **Survey Wizards** > **Survey Properties**.
2. Ensure the **Enable the enhanced task survey capabilities. Survey distribution is controlled by Survey Conditions.** property is enabled (select the check box).
3. Navigate to **Survey Wizards** > **Survey Conditions**.
4. Click **New**.
5. Enter the condition details and click **Submit**.

- **Type**: *Survey Wizard*
- **Survey wizard**: *Software Needs Analysis*

- **Active**: select the check box
- **Table**: *Incident*
- **User field**: *Caller*
- **Description**: *Send software survey to all users with software questions*
- **Condition**: *Category is Software*

6. Navigate to **System Policy > Email > Notifications**.
7. Click **New**.
8. Enter the email notification details and click **Submit**.
   - **Name**: *Software Survey*
   - **Event name**: *task.send_survey*
   - **Table**: *Incident*
   - **User field**: *event.parm1*
   - **Active**: select the check box
   - **Conditions**: *Category is Software*
   - **Subject**: *Please take the software survey (Incident ${number})*
   - **Message**: *Please complete this survey to help us evaluate our ongoing software needs. Click here to take the survey.*
9. Filter the Email Notifications list using the condition: *Event Name is task.send_survey and Table is Incident*.
10. If any other notifications exist, increase their **Weight** value so that only the *Software Survey* is sent when the incident category is software (the *Software Survey* has a **Weight** of *0*, so it has the highest priority of any notifications for the incident table).

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/administer/wizards/concept/c_CreateASurveyWizardDemo.html

Survey Properties

Overview

Survey properties control the way survey conditions work and prevent the same survey from being sent to the same recipients for a configured interval. These properties apply to all surveys and survey wizards (requires Survey Wizard plugin). See Surveys for a list of the tasks required for each type of survey setup.

Note: *A significantly improved and updated feature named Survey Management is available starting with the Eureka release. Survey components from previous versions are available in legacy modules and can be migrated.*

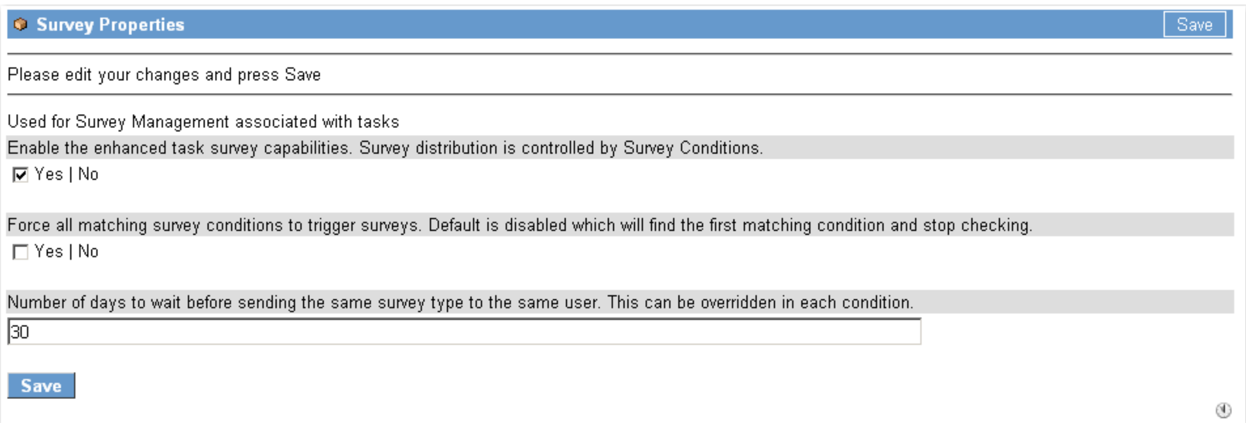
Prerequisites

Create the survey questions and response values before configuring the survey properties. For a complete list of the procedures for conducting surveys, see Surveys.

Settings

The Best Practice - Task Survey Management plugin installs the following properties for surveys associated with tasks:

- **glide.task.survey_active:** *Enable the enhanced task survey capabilities. Survey distribution is controlled by Survey Conditions.* Select **Yes** to allow the repeat interval setting in the Survey Condition form to override the global setting (the `glide.task.survey_days_wait` property) for controlling how often the same survey is sent to the same user. This property must be set to active to send randomized surveys
- **glide.task.survey_send_all:** *Force all matching survey conditions to trigger surveys. Default is disabled which will find the first matching condition and stop checking.* Select **Yes** to require all the conditions specified in the Survey Conditions form to match before a survey is sent. The default requires only a single condition to be met. The `glide.task.survey_active` property must be set to **Yes** for this property to be enabled.
- **glide.task.survey_days_wait:** *Number of days to wait before sending the same survey type to the same user. This can be overridden in each condition.* This is a global setting that controls the repeat interval for all surveys. If the `glide.task.survey_active` property is set to **Yes**, the global repeat interval can be overridden for individual surveys in the Survey Conditions form. The default is 30 days.



What Do I Do Next?

Create survey conditions that define the conditions under which a survey should be sent, how often a survey should be sent, and to whom.

Survey Conditions

Overview

Survey conditions enable administrators to define how often a survey can be sent to a particular user and the task conditions that trigger a survey. For example, send a help desk satisfaction survey to 20% of users who open incidents when those incidents are updated to a **Resolved** state, and set the interval for resending this survey to those same users at 60 days.

The survey conditions functionality is available in the base system. Surveys and survey wizards (requires Survey Wizard Plugin) can be triggered by survey conditions.

Note: *A significantly improved and updated feature named Survey Management is available starting with the Eureka release. Survey components from previous versions are available in legacy modules and can be migrated.*

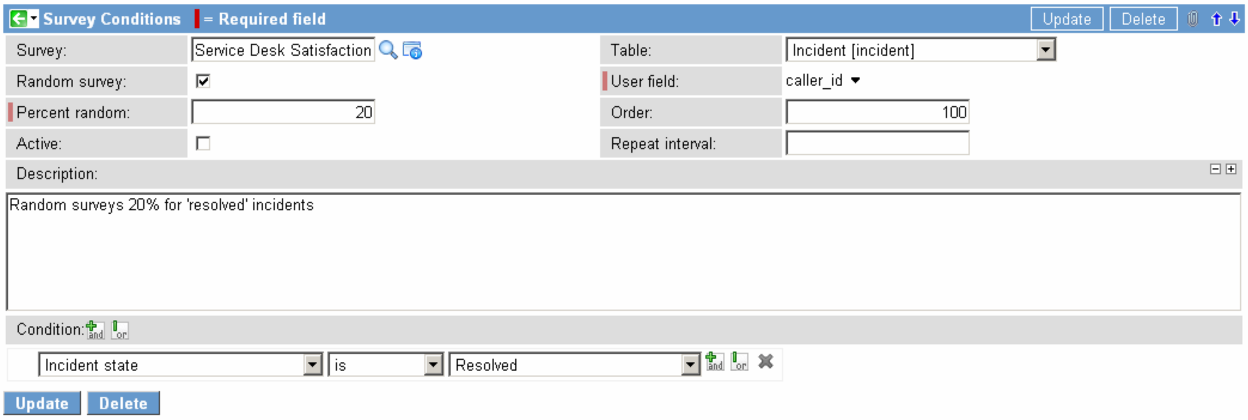
Prerequisites

Survey conditions are dependent on settings in survey properties. Make sure to set the survey properties correctly before attempting to create survey conditions. For a complete list of the procedures for conducting surveys, see Surveys.

Setup

To configure conditions for a specific survey:

1. Navigate to the appropriate location for your version:
   - Eureka release or later: **Survey Management > Legacy Administration > Survey Properties**
   - Dublin release or earlier: **Survey > Administration > Survey Properties**
2. Make sure that the **Enable the enhanced task survey capabilities** property is enabled (**Yes**).
3. Navigate to the appropriate location for your version:
   - Eureka release or later: **Survey Management > Legacy Administration > Survey Conditions**
   - Dublin release or earlier: **Survey > Administration > Survey Conditions**
4. Mark the survey conditions as Active (**true**) for the surveys you want to send.
5. If you want a custom survey, build one in the survey master with a list of questions, using the procedures in Creating a Survey. Otherwise, go to the next step.
6. Navigate to the **Survey Conditions** module again and click **New**.
7. Define the survey conditions that generate survey requests automatically for a specific survey (see table).



Field	Description
Type	Select whether a survey or survey wizard is sent when conditions are met. Requires Survey Wizard plugin.
Survey	Select the survey to send.
Random survey	Select this check box to generate random surveys. If you enabled random surveys you must provide a percentage of randomization.
Percent random	Select the percent of randomization. This percentage is not exact, but a close estimate. To view the logic behind this, see the *task survey events* business rule.
Active	Select the check box to enable this survey condition.
Table	Select the database table for the task survey you have selected. **Note:** *The list shows only tables and database views that are in the same scope as the survey condition (starting with the Fuji release).*
User Field	Select a value from the pop-up list that contains the user reference in the table you have selected. The platform uses this value to identify the recipient of the survey.
Order	Type the sequence in which this survey condition should run. If multiple conditions are met, then the conditions run in the order specified here, from lowest to highest.
Repeat interval	Enter the number of days to wait before sending a survey of the same type to the same user. The value in this field overrides the value in the survey interval property in the **Survey Properties** module.
Description	Type a unique description of this condition that makes it easy to identify.
Condition	Build a condition using the condition builder to isolate specific tasks that will generate this survey. The condition builder is case-sensitive. For example, if the condition is **[Keywords] [are] [Email]**, the system ignores records that contain the keyword **email**.

What Do I Do Next?

Create the email notification that will send the survey.

Email Notifications for Surveys

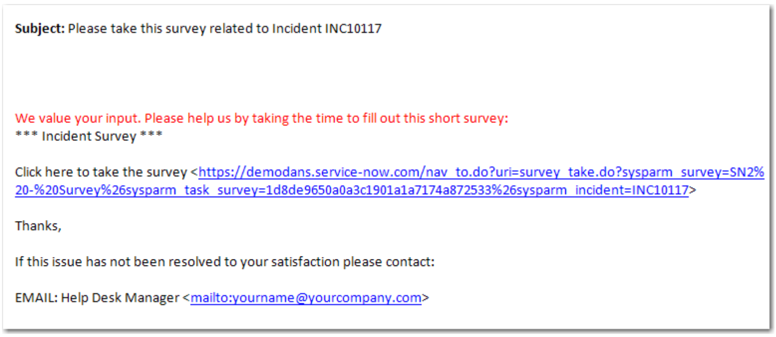
Overview

Surveys and survey wizards are configured to send default email notifications automatically when certain preconfigured conditions are met. See Email Notifications for general details on setting up notifications. Email notifications control the following survey characteristics:

- Names the event that must occur for the survey notification to be sent.
- Defines the conditions that trigger the event.
- Names the ServiceNow table involved.
- Defines the Subject line and Message for the survey notification.
- Names the field that contains the user who receives the survey.

A business rule called **task survey events** queries survey conditions for a match and triggers the **task.send_survey** event if it finds an active survey condition that evaluates to *true*. This preregistered event is included by default and is linked to three sample email notifications. You can modify these notifications or add additional notifications to meet your needs.

- Change Survey
- Incident Survey
- Request Survey



Subject: Please take this survey related to Incident INC10117

We value your input. Please help us by taking the time to fill out this short survey:
*** Incident Survey ***

Click here to take the survey <https://demodans.service-now.com/nav_to.do?uri=survey_take.do?sysparm_survey=SN2%20-%20Survey%26sysparm_task_survey=1d8de9650a0a3c1901a1a7174a872533%26sysparm_incident=INC10117>

Thanks,

If this issue has not been resolved to your satisfaction please contact:

EMAIL: Help Desk Manager <mailto:yourname@yourcompany.com>

Survey email notification

Note: *A significantly improved and updated feature named Survey Management is available starting with the Eureka release. Survey components from previous versions are available in legacy modules and can be migrated.*

Prerequisite

Configure the appropriate survey conditions before creating an Email Notification record for the survey.

Setup

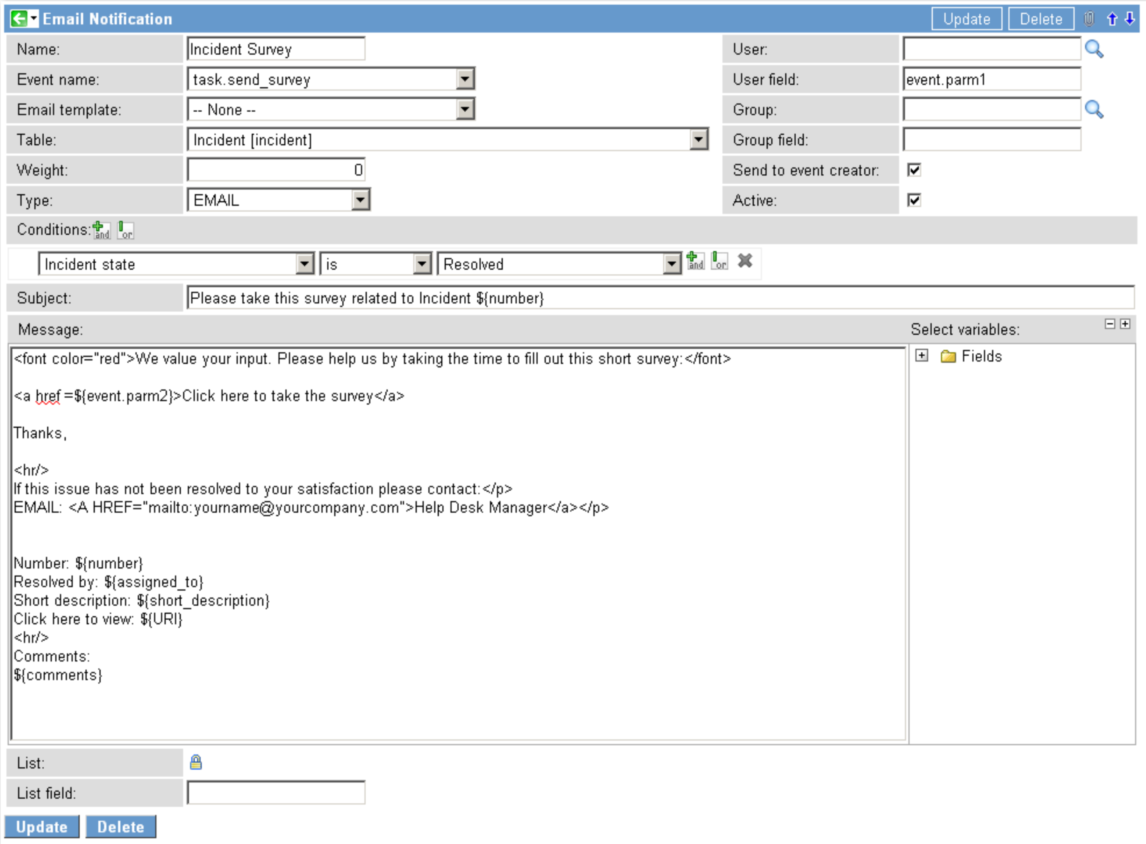
When the specified event fires (in this case, when an incident is marked **Resolved**), the instance reacts by checking the Survey Conditions to see if a survey should be sent. If a survey is required, the user in the **caller_id** field receives an email asking him to take the survey.

1. Navigate to **System Policy > Email > Notifications**.
2. Click **New**.
3. Provide the following information about the survey:

Field	Input Value
Event name	Enter **task.send_survey**, the pre-registered business rule that is included by default.
Table	Select the appropriate database table to which this notification is linked. **Note:** *The list shows only tables and database views that are in the same scope as the notification (starting with the Fuji release).*
User field	Set this value to **event.parm1**, the parameter which contains the value of the **User field** as defined in the matching Survey Condition.
Active	Select the check box (*true*) to enable email notification.
Conditions	Create a condition that triggers the **task.send_survey** event. For example, configure the event to trigger when the incident state changes to **Resolved** or **Closed**.
Subject	Type an appropriate subject line for your email. Select variables for your content from fields in the Incident table. Put the cursor in the subject line where you want the variable to appear, and then click the field name in the **Select variables** column.

Message	Construct a message that introduces the survey and provides the link to the survey. Select the appropriate variables for the message from the fields in the table named in the **Table** field. Put the cursor in the subject line where the variable should appear, and then click the field name in the **Select variables** column. Create a link for the user to click with the **${event.parm2}** parameter, which contains the value for the survey URL (**surveyURL**) as defined in the **task survey events** business rule for the **task.survey_send** event. The following is an example of this syntax:
	
	`<font color="red">We value your input. Please help us by taking the time to fill out this short survey:</font>`
	`<a href =${event.parm2}>Click here to take the survey.</a>`
	
	Note: Construct the message using HTML, or add individual HTML tags to change the font or color of the text, including the contents of the variables.

Select variables	Use this list to insert variables into your subject line and message body. The fields that appear in the list are in the table you selected for this notification. Put the cursor in the message body where you want the variable to appear, and then click the appropriate field.



What Do I Do Next?

This is the end of the survey configuration process for email notification. Another option for distributing surveys is the public option, which allows anyone to take the survey without having to log in to the instance. This distribution method is not intended to replace the dynamic email notification of logged in users.

Making a Survey Public

Overview

Administrators can make a survey public, which allows users or non-users to respond anonymously. No login is required to take a public survey. Once a survey is made public, deliver it using any of the following methods:

- Email
- Module on the main page of the instance

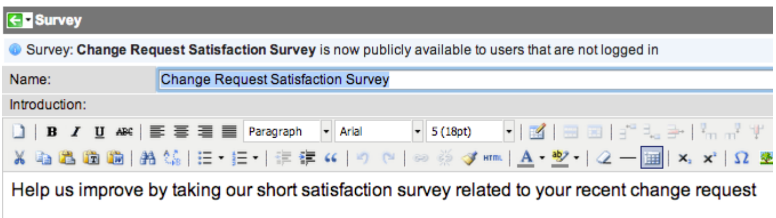
To make a survey wizard public (requires Survey Wizard plugin), see Making a Wizard Public. Survey wizards must be public to be delivered via email.

Note: *A significantly improved and updated feature named Survey Management is available starting with the Eureka release. Survey components from previous versions are available in legacy modules and can be migrated.*

Making Surveys Public

To configure public surveys:

1. Navigate to the appropriate location for your version:
   - Eureka release or later: **Survey Management > Legacy Surveys > Masters**
   - Dublin release or earlier: **Survey > Masters**
2. Select the survey to make public.
3. Click the **Enable Public Access** related link. A message appears at the top of the form indicating that the survey is now available to users who are not logged in.



Making a survey available to users who are not logged in

Emailing a Link to a Public Survey

After a survey is configured as public, you can deliver it by email to anyone, including recipients who are not ServiceNow users. No login or identification of any kind is required to access and respond to the survey, and all responses are anonymous. In addition, users can copy the survey link from an email notification and attach it to another email for wide distribution.

By default, only one set of responses per logged-in user for each survey is recorded. Responses from a user who retakes a survey overwrite the user's previous responses to the survey. All anonymous recipients (those not logged into the instance) who take a public survey are marked as **Guest**. If the overwrite flag is not disabled for public surveys, each anonymous response overwrites the previous response and registers only a single survey, regardless of how many recipients respond.

To prevent the system from overwriting previous responses to an anonymous survey, append the following argument to the email link:

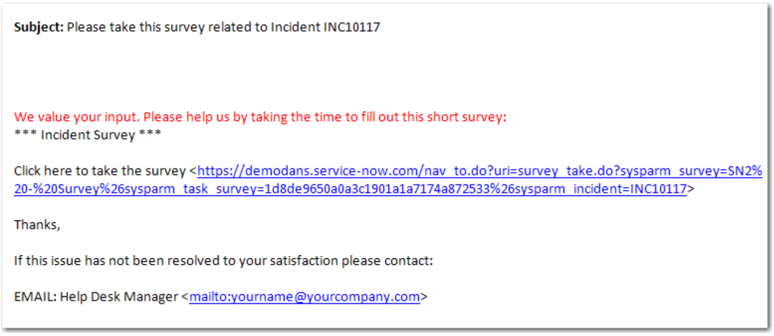
sysparm_survey_update=false

The URL to the survey must contain the name of the survey.

Warning: Use URL encoding for survey links. This is especially important for survey names with non-ASCII characters.

An example of the URL for the **Helpdesk Satisfaction** survey with overwrite disabled is as follows:

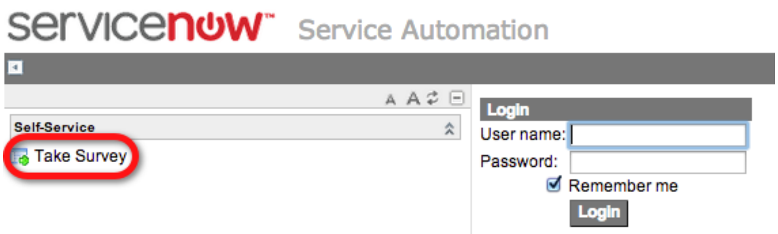
https://demosw.service-now.com/nav_to.do?uri=survey_take.do?sysparm_survey=Helpdesk%20Satisfaction%20Survey%26sy



An example email with a survey link

Configuring the Survey to Appear on the Login Page of the Instance

Administrators can make public surveys available on the main (welcome) page of an instance. It appears even before a user has logged in.



Survey link on login screen

To make a public survey accessible on a login page:

1. In the navigation pane, right-click **Self-Service** and choose **Edit Application Menu**. The Application Menu form opens.
2. Click the padlock icon next to the **Roles** field on the form, and then add the **public** role.
3. Right-click the header bar and select **Save**.
4. In the **Modules** related list, click **New**.
5. Complete the form as follows:
   - **Title:** *<module name>*
   - **Application menu:** *Self-Service*
   - **Image:** *<module image>*
   - **Hint:** *<hint text for the module>*
   - **Roles:** *public*
   - **Active:** *<selected>*
   - **Link type:** *Survey*
   - **Survey:** *<survey to add to the welcome page>*
   - **Survey overwrite:** *<cleared>*

   Clearing the check box allows anonymous recipients to record their responses to a survey. The overwrite feature is intended for use with logged-in users only. You must disable it to accumulate survey responses from anonymous **Guest** users. See Sending Public Surveys via Email for details.
6. Click **Update**.

   The survey you selected can be accessed now from the navigation pane in the ServiceNow login window by anyone, even if they are not are a licensed user.

What Do I Do Next?

Filter the results of the survey and create a report. Select from the various reporting options to prepare a different view of the data, save the report, or create a gauge for the homepage.

Reporting

Task Survey Management Reports

Overview

Best Practice - Task Survey Management provides reports for tracking survey responses. Use the available gauges to display these reports on homepages. View survey reports on the survey overview homepage by navigating to the appropriate location for your version:

- Eureka release or later: **Survey Management > Legacy Surveys > Overview**
- Dublin release or earlier: **Survey > Overview**

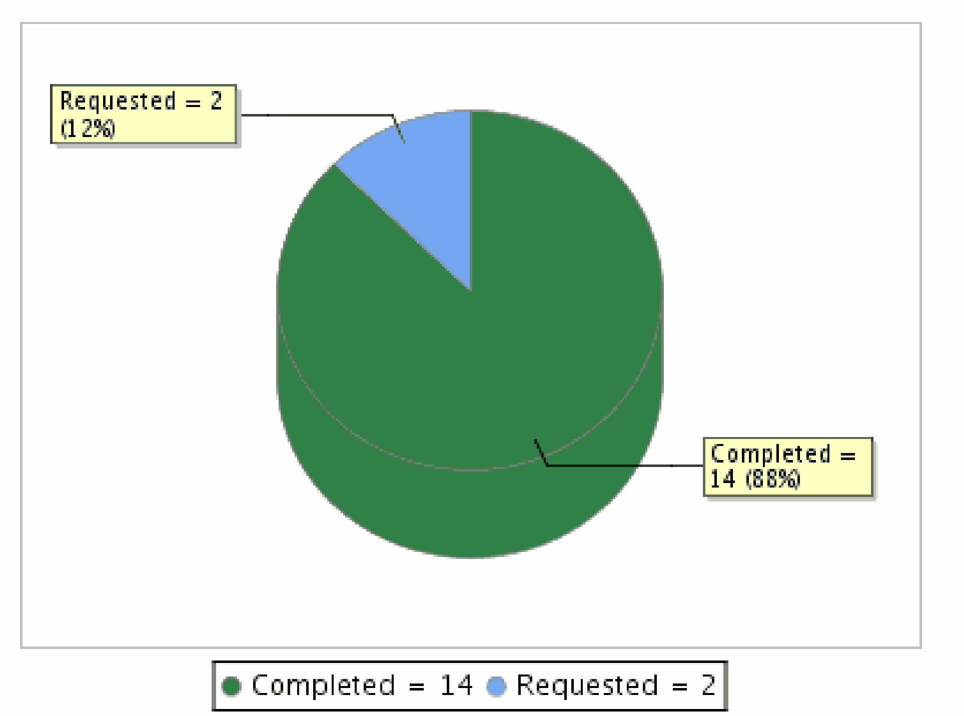
To learn more about reports, see Report Types.

Note: *A significantly improved and updated feature named Survey Management is available starting with the Eureka release. Survey components from previous versions are available in legacy modules and can be migrated.*

Report Summary

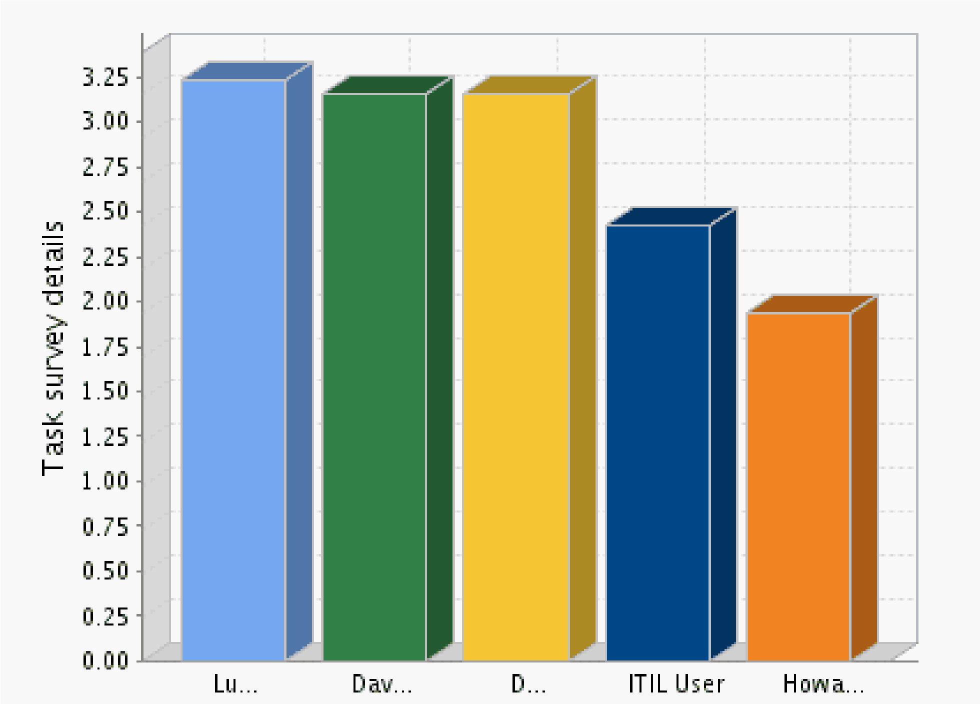
Task Survey States 90 Days

This report displays the ratio of surveys requested versus completed over the past 90 days.



Service Desk Technician Competency 90 Day Average

This report displays the average rating of the *technical competency* question by task assigned to a user.

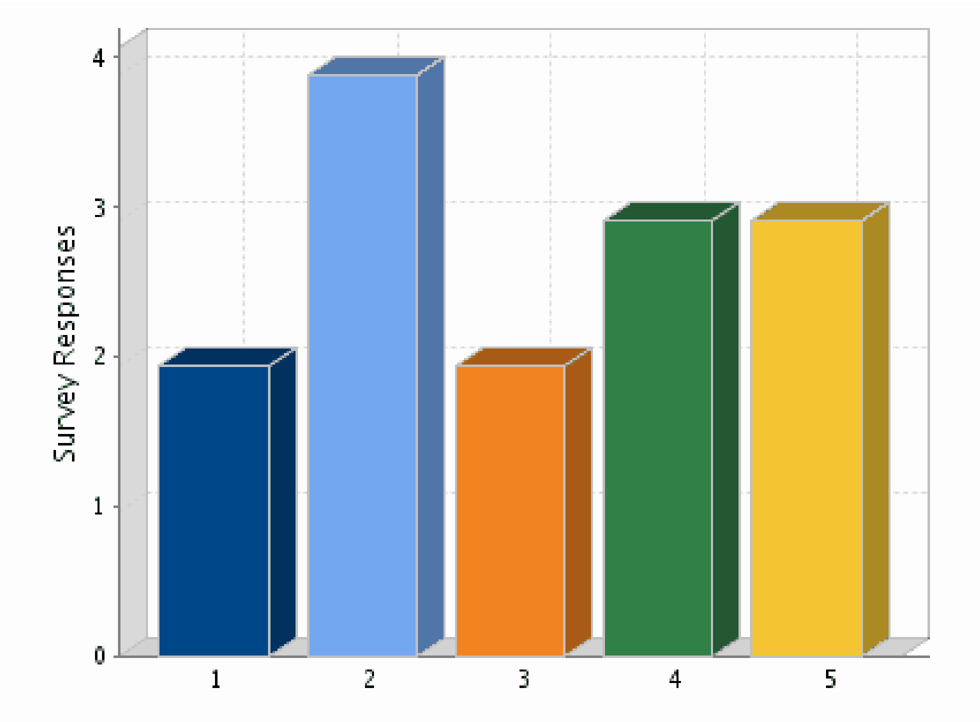


Reporting on Survey Responses

The following reports summarize responses this month for each question in the standard Service Desk Satisfaction Survey.

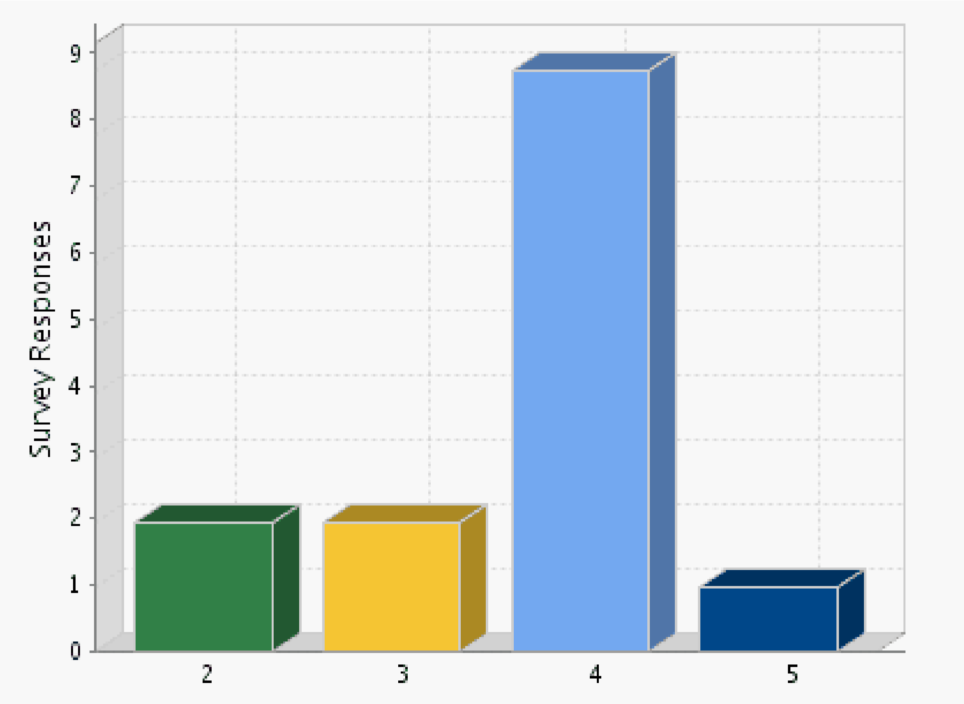
Service Desk Survey Timely Response 30 Days

Question 1: *How satisfied were you with the response time to your incident?*



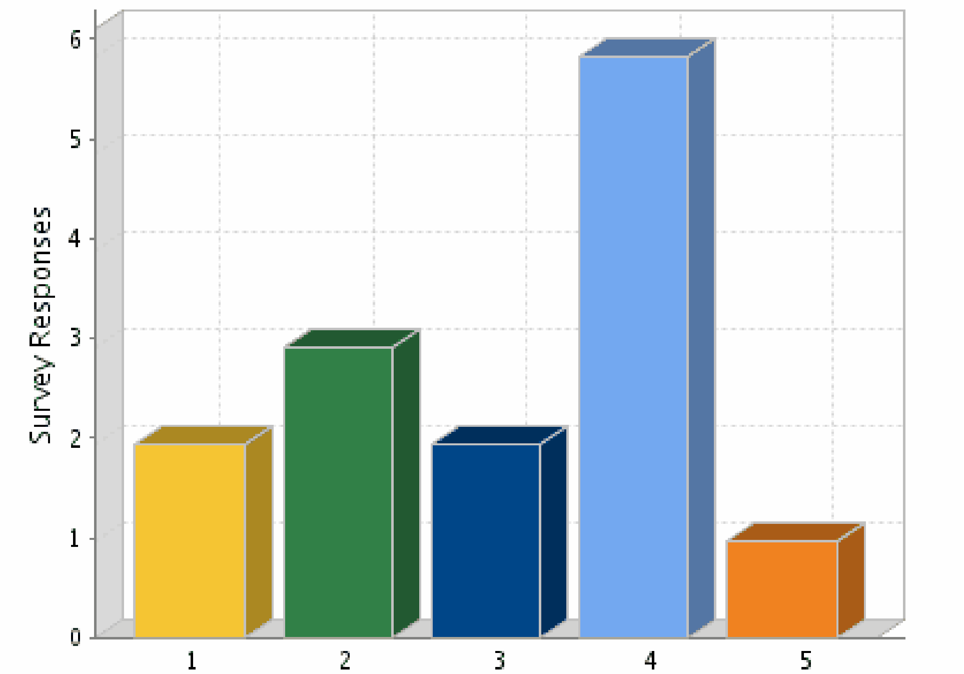
Service Desk Survey Tech Courteous 30 Days

Question 2: *How courteous and respectful was the technician who responded?*



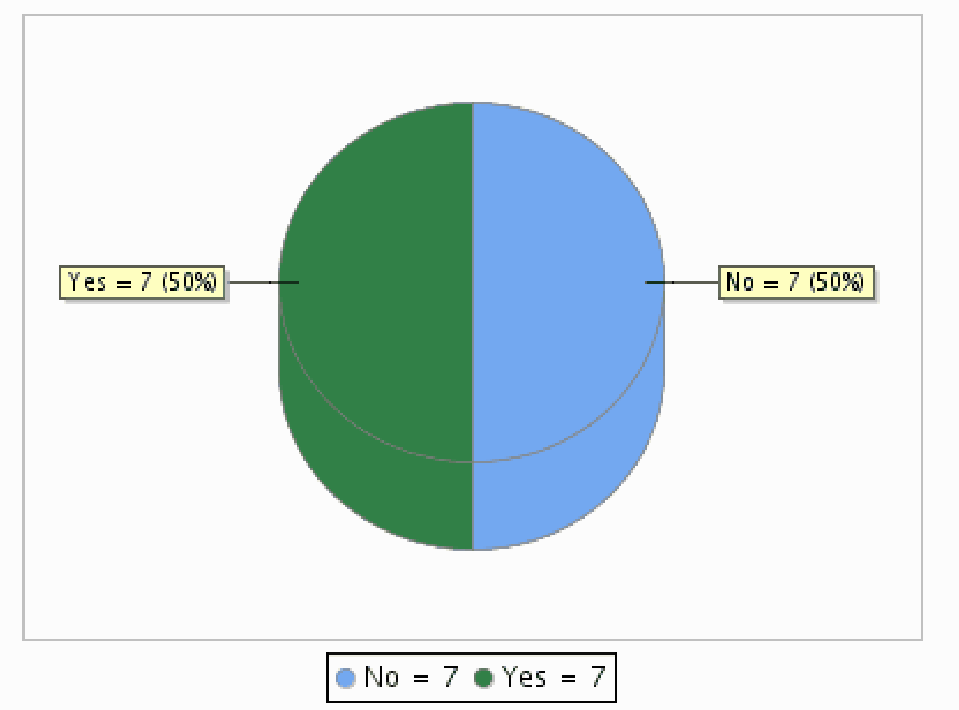
Service Desk Survey Tech Competence 30 Days

Question 3: *Please rate the technical competency of the technician serving you.*



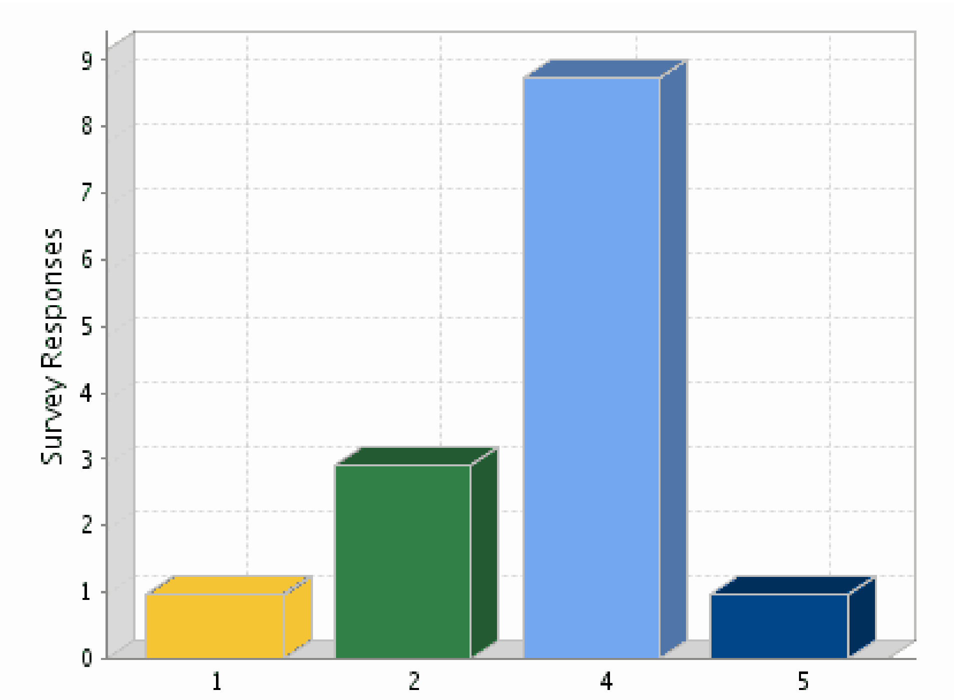
Service Desk Survey First Call Resolve 30 Days

Question 4: *Was technician able to resolve your issue during the first call?*



Service Desk Survey Overall Experience 30 Days

Question 5: *How satisfied are you with your overall service experience?*



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