Survey Management

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Introduction

Survey Management

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information, see Get Started with Survey Management* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated.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

The survey feature allows you to create, send, and collect responses for basic surveys quickly and easily. There are also many options for advanced configuration. Some of the many things you can do with surveys include:

- Create a survey, add questions, and choose recipients, all in one interface.
- Create conditional questions, which appear only when users answer other questions a certain way.
- Restrict a survey so only specific *survey users* can take it and send all of them invitations simultaneously.
- Set a schedule to automatically assign a survey to users and to limit how often the same user can take a survey.
- Customize the look and feel of survey questionnaires.
- Save anonymous survey responses.
- Convert survey responses to numerical scores and view them on *scorecards*.
- Deactivate a survey for maintenance or to retire it without deleting it.

Surveys are available in the base system as an alternative to legacy surveys starting with the Eureka release. Surveys provide the same basic functionality as legacy surveys and include extended capabilities. Survey administrators can continue to use legacy survey functionality and data. However, the recommended course of action is to migrate legacy surveys to the survey platform. Concurrent use of both features can lead to confusion and redundancy. Note that survey wizards are not impacted and cannot be migrated.

Note: *Surveys use the same tables and other back-end components as assessments. Due to the shared nature of these features, you may see assessment elements such as table and field names in certain places throughout the survey feature.*

Version Comparison

Capability	Survey Management	Legacy Surveys
Save new survey responses each time a user takes the same survey.	✓	
Create question templates to reuse sets of answer options.	✓	
Categorize survey questions and report on category results.	✓	
Deactivate a survey without deleting it.	✓	
Create conditional questions.	✓	
Send surveys automatically on a schedule.	✓	
Customize survey questionnaire color scheme.	✓	
Save anonymous survey responses for logged-in users.	✓	
View survey responses on graphical scorecards.	✓	
Save surveys in a draft state until they are ready to publish.	✓	
Create and send surveys from one page.	✓	
Allow only specific users to access a survey.	✓	
Send surveys based on conditions.	✓	✓
Send survey email notifications.	✓	✓
Limit how often a user can take the same survey.	✓	✓
Add introduction and end note text.	✓	✓
Create survey modules.	✓	✓
Allow people to take a survey without logging in.		✓

Note: *The Public Survey feature is available in Survey Management starting with the Geneva release.*

Key Terms

- **Survey definition:** the root record on which a survey is built. Contains information like the survey name, state, and distribution schedule. Each survey definition has its own categories and questions. Survey definitions are comparable to legacy survey masters.
- **Survey category:** represents a theme for survey questions. Categories contain one or more questions. The system creates one category per survey by default. Additional categories are optional.
- **Survey question:** a question that appears on survey questionnaires for the associated survey definition. Survey questions are comparable to legacy survey questions.
- **Survey user:** a user who is authorized to receive invitations for a restricted survey.
- **Survey instance:** represents one survey questionnaire assigned to one user. Survey instances are comparable to legacy survey instances.
- **Trigger condition:** defines a rule that enables the system to send a survey when an action occurs on a table, such as when an incident closes. Trigger conditions are comparable to legacy survey conditions.
- **Scorecard:** provides a visual breakdown of survey responses. Scorecards display a variety of data summaries for one survey definition.

Setup Procedure

Use the following procedure to set up basic surveys as quickly as possible. For information about additional configuration options, see Fine-Tuning Surveys.

1. [Optional] Create any survey question templates or survey user groups you want to use for the survey.
2. Use the survey creator to quickly create a basic survey.

   The survey creator lets you set survey preferences, add questions, and choose a delivery method all in one place. You can:

   - Make the survey public for all users to take. The survey creator provides a URL that you can distribute to users.
   - Restrict survey access so only certain users can take it.
   - Configure the system to send the survey automatically based on trigger conditions.
3. Publish the survey when it is ready for users to take it.

   You can publish the survey immediately from the survey creator or later from the Survey Definition form.
4. Use one of the many methods to share the survey with users.
5. View responses.

Roles

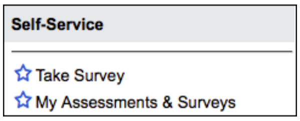
The Survey Management application uses the following roles. No role is required to take survey questionnaires that are assigned to you.

Role Title	Role Name	Description
Survey administrator	survey_admin	Survey administrators create and administer surveys. They know what topics to create surveys for, when to send each survey, and who to assign surveys to. Survey administrators can use all modules in the Survey Management application menu. The survey_admin role contains the survey_reader and assessment_admin roles.
Survey reader	survey_reader	Survey readers view surveys and related information, such as survey responses, survey groups, scorecards, and reports.
Administrator	admin	Administrators have access to all aspects of the survey process. Only administrators can modify survey notifications, create survey modules, and import surveys.

Menus and Modules

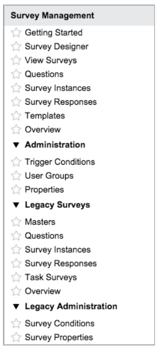
The Survey Management application menu replaces the Survey application menu (starting with the Eureka release). The modules from the Survey application menu are moved to the Survey Management application menu and marked as legacy features.

The following survey modules are available:



Under the **Self-Service** menu:

- **Take Survey:** Complete a customer satisfaction survey questionnaire. This module opens a legacy survey in versions prior to the Eureka release.
- **My Assessments & Surveys**: View and complete questionnaires assigned to you. Both assessment and survey questionnaires are listed.



Under the **Survey Management** menu:

- **Getting Started:** Open a ServiceNow Wiki page for information about surveys.
- **Survey Designer:** Create a new survey, using either the survey designer or the Eureka survey creator. Starting with the Fuji release, Microsoft Internet Explorer browsers at version 8 or earlier are redirected to the survey creator.
- **View Surveys:** Manage survey definitions.
- **Questions:** Manage survey questions.
- **Survey Instances:** View survey instances.
- **Survey Responses:** View survey responses.
- **Templates:** Manage question templates.
- **Overview:** View various survey gauges to help track survey states and results.
- **Administration**
  - **Trigger Conditions:** Create trigger conditions to send surveys automatically when specific actions occur.
  - **User Groups:** Create survey user groups to quickly assign surveys to multiple people at once.
  - **Properties:** Set properties to customize surveys.
- **Legacy Surveys**
  - **Masters:** View legacy survey masters. By default, the list shows only survey masters that have not been migrated.
  - **Questions:** View legacy survey questions.
  - **Survey Instances:** View legacy survey instances.
  - **Survey Responses:** View legacy survey responses.
  - **Task Surveys:** View legacy task survey records.
  - **Overview:** View various legacy survey gauges to help track legacy survey states and results.
- **Legacy Administration**
  - **Survey Conditions:** View legacy survey conditions.
  - **Survey Properties:** View legacy survey properties.

Enhancements

Fuji

- Administrators can present *assertions* on a survey that contain requirements, admonitions, or policies related to the questions, and then require recipients to certify with a signature that they have read and complied with these expectations.
- The survey designer provides a single interface for creating, editing, and distributing surveys. Microsoft Internet Explorer browsers at version 8 or earlier are incompatible with the designer and are redirected to the Eureka survey creator instead.

References

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

Migrating

Overview

Survey management, built on the assessment engine, is available as an alternative to legacy surveys starting with the Eureka release. For a comparison of the two features, see Version Comparison. Users with the survey_admin role can migrate legacy survey data to create copies of legacy surveys and their related records in assessment tables.

The following legacy survey components are migrated:

- Survey masters
- Supported survey questions and question choices
- Survey instances
- Survey responses

Legacy survey conditions are not migrated and must be recreated as trigger conditions.

Note: *Survey wizards cannot be migrated.*

Survey Question Migration

Before you migrate a legacy survey, understand that some legacy survey questions cannot be migrated due to incompatible question types. Legacy survey questions are migrated from the Survey Question [survey_question_new] table to the Assessment Metric [asmt_metric] table. In legacy surveys, the **Type** field on the Survey Question table determines how the question renders on the survey questionnaire. In assessment surveys, the **Data type** field on the Assessment Metric table serves a similar purpose. Certain legacy survey types are not supported in assessment surveys.

The following table shows the conversion path for each legacy survey type to an assessment data type, if there is one.

Legacy Survey Type	Assessment Survey Data Type
Break	Not available
CheckBox	Checkbox
Date	Date
Date/Time	Date/Time
HTML	Not available
Label	Not available
List Collector	Not available
Lookup Multiple Choice	Not available
Lookup Select Box	Not available
Macro	Not available
Macro with Label	Not available
Multi Line Text	String (**String option** set to **Multiline**)
Multiple Choice	Likert Scale
Numeric Scale	Number
Reference	Not available
Select Box	Choice
Single Line Text	String (**String option** set to **Single line**)
UI Page	Not available
Wide Single Line Text	String (**String option** set to **Single line wide**)
Yes / No	Yes/No

Migrating Legacy Surveys

To migrate a legacy survey and its related records:

1. Navigate to **Survey Management > Legacy Surveys > Masters**.

   The list of legacy survey masters appears. By default, the list shows only survey masters that have not been migrated. To show all survey masters, remove the **Assessment is empty** breadcrumb.
2. Open a survey.
3. Under **Related Links**, click **Migrate to Assessment**.

   A dialog box appears, which describes what happens when you migrate the survey. Note that certain types of survey questions cannot be migrated.
4. Click **OK**.

   The system automatically generates records on assessment tables based on the survey master, eligible questions and choices, results, and other related survey components. The original survey components are unaffected.

   System messages may appear at the top of the Survey form to:

   - Notify you of questions that could not be migrated.
   - Advise you to review any migrated questions with the **Multiple Choice** type. For more information, see Reviewing Migrated Questions.

5. [Optional] View the new assessment survey by clicking the reference icon ( ) beside the **Assessment** field, which appears on the Survey form when the legacy survey has been migrated.
6. [Optional] Remove survey users from the assessment survey if you want all users to be able to take it.

   When you migrate a survey, any users who have taken it are automatically associated with the assessment survey and become *survey users*. When there are survey users associated with an assessment survey, only those users can take it.
7. Deactivate any survey conditions associated with the survey:
   1. Navigate to **Survey Management > Legacy Administration > Survey Conditions**.
   2. In the **Active** column, ensure the value is **false** for any survey conditions that reference the migrated survey.
   3. Navigate to **Survey Management > Administration > Trigger Conditions** to create new *trigger conditions*.

Note: *The **Migrate to Assessment** related link on the legacy survey record becomes unavailable after the migration. However, if you delete the record referenced in the **Assessment** field, the related link reappears and you can migrate the legacy survey again.*

Reviewing Migrated Questions

Note: *The assessment engine provides a built-in result calculation feature that converts each survey response to a score between 0 and 10. The configuration required to maintain accurate result calculations is advanced and is not recommended for basic survey implementations. If you do not plan to use result calculation data, ignore the information in this section.*

If you want to maintain accurate result calculations, you may need to make minor adjustments to some of the migrated survey records to ensure results are calculated correctly.

For each legacy question migrated, the system creates a survey question record on the Assessment Metric [asmt_metric] table. For legacy questions of the **Multiple Choice** and **Select Box** types, the system also creates a metric definition record, on the Assessment Metric Definition [asmt_metric_definition] table, for each legacy question choice.

Metric definitions and survey question choices are comparable and have similar fields:

Survey Question Choice Field	Related Metric Definition Field
Text	Display
Value (can be any string value)	Value (must be numerical value)
Order	Value (metric definition with smallest **Value** is first)

When the system migrates legacy survey question choices, it uses the legacy **Order** to set each metric definition **Value**. For the legacy question choice with the smallest **Order**, the corresponding metric definition **Value** is set to **1**. For the legacy question choice with the next smallest **Order**, the metric definition **Value** is **2**, and so on.

The **Scale definition** field on the migrated Survey Question form determines whether smaller or bigger metric definition values equate to a good score in survey result calculations. By default, the scale definition is set to **High**, meaning bigger values are good. When you migrate a legacy survey, check that the default scale definition makes sense for each question. For example, the following tables depict a sample migrated question and the metric definitions automatically created for it. Recall that the system uses the order of the legacy survey question choices to set the metric definition value. **Excellent** has the lowest **Order** value, so when the system creates a metric definition for this question choice, the **Value** is set to **1**. In this case the default scale definition value, **High**, does not make sense, as the system will calculate the worst scores for responses of **Excellent**.

Legacy question: Please rate the overall quality of your service.			Migrated question: Please rate the overall quality of your service.	
Question choice *Text*	**Question choice *Value***	**Question choice *Order***	**Metric definition *Display***	**Metric definition *Value***
Excellent	A	100	Excellent	1
Good	B	200	Good	2
Fair	C	300	Fair	3
Poor	D	400	Poor	4

If there are no **Order** values for the legacy survey question choices, the system sets each corresponding metric definition **Value** based on the alphanumeric order of the legacy **Text** value:

Migrated question: Please rate the overall quality of your service.

Metric definition *Display*	Metric definition *Value*
Excellent	1
Good	3
Fair	2
Poor	4

You may also need to change the **Scale definition** setting for other migrated questions. For details, see the scale definition recommendations for each survey question data type.

Migrated Components

When you migrate a survey, the system maps records from survey tables to assessment tables. To create a functional survey on the assessment framework, the system converts survey records to the most logical equivalent assessment survey records. This may mean multiple assessment survey records represent one legacy survey record.

Survey component	Assessment survey components
Survey master [survey_master]	• Survey definition [asmt_metric_type] • Assessable record [asmt_assessable_record], for system use only • Survey category [asmt_metric_category]
Survey question [survey_question_new]	• Survey question [asmt_metric]
Question choice [question_choice]	• Assessment metric definition [asmt_metric_definition]
Survey instance [survey_instance]	• Assessment group [asmt_assessment], for system use only • Survey instance [asmt_assessment_instance]
Survey response [survey_response]	• Survey instance question [asmt_assessment_instance_question] • Survey response [asmt_metric_result] • Category result [asmt_category_result], for system use only

Installed Components

Overview

The following components are included with Assessments:

- Tables
- Properties
- User Roles
- UI Policies
- Script Includes
- Client Scripts
- Business Rules

Demo data is available for assessments and surveys. Vendor Performance offers an additional set of vendor assessment demo data.

Note: *Many of the components described on this page also support survey functionality, starting with the Eureka release.*

Tables

Assessments includes the following tables. Some of the tables are also used for surveys and may serve different purposes than they do for assessments (starting with the Eureka release).

Table	Description: Assessments	Description: Surveys
Assessable Record [asmt_assessable_record]	Stores all assessable records.	For system use only.
Assessment Category Result [asmt_category_result]	Stores all category results.	For system use only.
Assessment Category User [asmt_m2m_category_user]	Stores associations between users and metric categories they can assess. A user that is associated to a category is a category user.	Stores associations between users and surveys. A user that is associated to a survey is a survey user and is automatically associated to all the survey's categories.
Assessment Group [asmt_assessment]	Stores all assessment groups.	For system use only.
Assessment Instance [asmt_assessment_instance]	Stores all assessment instances.	Stores all survey instances.
Assessment Instance Question [asmt_assessment_instance_question]	Stores all assessment instance questions, each of which represents one question on one assessment instance.	Stores all survey instance questions, each of which represents one question on one survey instance.
Assessment Metric [asmt_metric]	Stores all metrics.	Stores all survey questions.
Assessment Metric Definition [asmt_metric_definition]	Stores all metric definitions.	Stores all answer options for survey questions.
Assessment Metric Template [asmt_template]	Stores all metric templates.	Stores all question templates.
Assessment Metric Type [asmt_metric_type]	Stores all metric types.	Stores all survey definitions.

Assessment Stakeholders [asmt_m2m_stakeholder]	Stores associations between assessable records and category users. A category user that is associated to an assessable record is a stakeholder.	Not used for surveys.
Assessment Template Definition [asmt_template_definition]	Stores all metric template definitions.	Stores all question template definitions.
Assessment X Category Matrix [asmt_m2m_xcategory_matrix]	Allows users to specify metric categories as the X axis of a decision matrix.	Not used for surveys.
Assessment Y Category Matrix [asmt_m2m_ycategory_matrix]	Allows users to specify metric categories as the Y axis of a decision matrix.	Not used for surveys.
Bubble Chart [asmt_bubble_chart]	Stores all bubble chart definitions (starting with the Eureka release).	Not used for surveys.
Category Assessable Records [asmt_m2m_category_assessment]	Stores associations between assessable records and metric categories.	For system use only.
Decision Matrix [asmt_decision_matrix]	Stores all decision matrixes.	Not used for surveys.
Metric Category [asmt_metric_category]	Stores all metric categories.	Stores all survey categories.
Metric Result [asmt_metric_result]	Stores all metric results.	Stores all survey responses.
Signature [asmt_signature]	Stores all signature records for assessments and GRC attestations. This table is available starting with the Fuji release.	Stores all signature records for surveys.
Trigger Condition [asmt_condition]	Stores all assessment trigger conditions (starting with the Eureka release).	Stores all survey trigger conditions.

Properties

Assessments includes the following system properties.

Name	Description

com.snc.assessment.signature_authentication	Require authentication for user signature. When **Yes** is selected, this property requires credentials for a full name signature. This property is available starting with the Fuji release.
	• **Type**: True/False
	• **Default value:** true
	• **Location:**
	  ◦ Assessments > Admin > Assessment Properties
	  ◦ Survey Management > Administration > Properties
	• **Learn more:** Signatures

css.assessment.caption.background.color	Sets the background color of the caption on assessment and survey questionnaires. This property is available starting with the Eureka release.
	• **Type**: color
	• **Default value:** #eee
	• **Location:**
	  ◦ Assessments > Admin > Assessment Properties
	  ◦ Survey Management > Administration > Properties
	• **Learn more:** Customizing Appearance

css.assessment.caption.font.color	Sets the font color of the caption text on assessment and survey questionnaires. This property is available starting with the Eureka release.
	• **Type**: color
	• **Default value:** #ffffff
	• **Location:**
	  • Assessments > Admin > Assessment Properties
	  • Survey Management > Administration > Properties
	• **Learn more:** Customizing Appearance

css.assessment.question.header.background.color	Sets the background color of question headers on assessment and survey questionnaires. This property is available starting with the Eureka release.
	• **Type**: color
	• **Default value:** #767676
	• **Location:**
	  • Assessments > Admin > Assessment Properties
	  • Survey Management > Administration > Properties
	• **Learn more:** Customizing Appearance

User Roles

Assessments includes the following user role.

Role	Contains Roles	Description
assessment_admin	none	Can administer the Assessments application. Can access all the modules of the Assessments application. **Note:** The assessment_admin role is contained by the itil_admin role. It is also contained by the survey_admin role starting with the Eureka release.

UI Policies

Assessments includes the following UI policies.

Name	Table	Description
Always hide filter table field	Assessment Metric Type [asmt_metric_type]	Hides the **Filter table** field and, starting with the Eureka release, shows the **State** field.
Display Question	Assessment Metric [asmt_metric]	Displays the **Question** field if the method is **Assessment**.
Display Randomize answers checkbox	Assessment Metric [asmt_metric]	Displays the **Randomize answers** field if the data type is **Choice** or **Likert Scale** (starting with the Eureka release).
Display Ratings	Assessment Metric [asmt_metric]	Reserved for future use.
Display Scale	Assessment Metric [asmt_metric]	Hides the **Scale definition** field if the metric data type is **Date**, **Date/Time**, or **String** (starting with the Eureka release).
Display Script	Assessment Metric [asmt_metric]	Displays the **Dependent plugin** and **Script** fields if the method is **Script**.
Display string options when data type is string	Assessment Metric [asmt_metric]	Displays the **String option** field if the data type is **String** (starting with the Eureka release).
Display Template	Assessment Metric [asmt_metric]	If the data type is **Template**: • Displays the **Template** field and makes it mandatory. • Hides the **Min** and **Max** fields and makes them read-only (Dublin release only). The **Hide Min and Max** UI policy performs this action starting with the Eureka release.

Display Weight	Assessment Metric [asmt_metric]	Hides the **Weight** field if the data type is **Date**, **Date/Time**, or **String** (starting with the Eureka release).
Hide duration value	Assessment Result [asmt_assessment_result]	Shows the **Duration value** field and hides the **Actual value** field if the associated metric data type is **Duration**.
Hide Method for survey view	Assessment Metric [asmt_metric]	Hides the **Method** field on the Survey Question form (starting with the Eureka release).
Hide Min and Max	Assessment Metric [asmt_metric]	Hides the **Min** and **Max** fields if the data type is **Checkbox**, **Date**, **Date/Time**, **String**, **Template**, or **Yes/No** (starting with the Eureka release).
Hide scaled value	Assessment Result [asmt_assessment_result]	Hides the **Scaled value** field if the associated metric method is **Assessment**.
Hide table	Metric Category [asmt_assessment_metric_category]	**Eureka release and later:** Hides the **Table** and **Filter** fields if the **Type** field is empty. **Dublin release:** Hides the **Table** field if the **Table** field is *not* empty.
Make Type read only after metrics added	Metric Category [asmt_assessment_metric_category]	Makes the **Type** field read-only if the category contains at least one metric.
Question required in survey view	Assessment Metric [asmt_metric]	Makes the **Question** field mandatory on the Survey Question form (starting with the Eureka release).
Show and hide mandatory	Assessment Metric [asmt_metric]	Hides the **Mandatory** field if the **Depends on** field contains a value and the data type is *not* **Checkbox** (starting with the Eureka release).
Show and make Probability field mandatory when Trigger randomly is true	Survey Trigger Condition [asmt_condition]	Shows the **Probability (%)** field if the **Trigger randomly** check box is selected (starting with the Eureka release).
Show Business Rule Hide UI Action	Assessment Metric Type [asmt_metric_type]	Reserved for future use.
Show fields when Link type is Assessment	Module [sys_app_module]	Shows the **Assessment** field and makes it mandatory if the **Link type** is **Assessment** (starting with the Eureka release).
Show or hide parent metric	Assessment Metric [asmt_metric]	Shows the **Depends on** field if the method is **Assessment** (starting with the Eureka release).
Survey View Hide fields	Assessment Category User [asmt_m2m_category_user]	Makes the **Metric category** field read-only if it contains a value (starting with the Eureka release).

Script Includes

Assessments includes the following script includes.

Name	Description
AssessmentUtils	Core code for assessment functionality.
AssessmentUtilsAJAX	AJAX based code for displaying scorecard data.
MigrateSurveyToAssessment	Code for migrating legacy surveys to assessment surveys (starting with the Eureka release).
RatingUtilsAJAX	Reserved for future use.
SurveyUtils	Core code for survey functionality (starting with the Eureka release).

Client Scripts

Assessments includes the following client scripts.

Name	Table	Description
Calculate Assessable Record Field choice list	Trigger Condition [asmt_condition]	Limits the **Assessable Record Field** choices to those that are compatible with the selected assessment (starting with the Eureka release).
Check survey schedule period	Trigger Condition [asmt_condition]	Checks the selected survey definition's **Schedule period**. If **Schedule period** is set to **Only Once**, this client script displays a warning message that each user can only take the selected survey once. Available starting with the Eureka release.
Clear display_when when depends changed	Assessment Metric [asmt_metric]	Shows the **Display when** field when the **Depends on** field is set. Clears the **Display when** field when the **Depends on** field changes and the options need to change. Available starting with the Eureka release.
Conditionally Set Type for Surveys	Group [sys_user_group]	Sets the user group **Type** to **survey** if you create a new group from the User Groups module (starting with the Eureka release).
Data type -- Hide choices for surveys	Assessment Metric [asmt_metric]	Ensures only **Data type** options that are valid for surveys are available on the Survey Question form (starting with the Eureka release).
Data type -- Show/Hide Not Applicable	Assessment Metric [asmt_metric]	Hides the **Allow not applicable** field and sets its value to **false** if the metric method is **Assessment** and the data type is **Percentage** or, starting with the Eureka release, **Checkbox**, **Date**, **Date/Time**, **Number**, or **String**.
Datatype defaults to String for surveys	Assessment Metric [asmt_metric]	Sets the default **Data type** field value to **String** on the Survey Question form (starting with the Eureka release).
Fetch Min/Max	Assessment Metric [asmt_metric]	Updates the **Min** and **Max** fields to match the least and greatest metric template definition values if an assessment administrator selects or changes the **Template** value.
Hide Assessable Record Field	Trigger Condition [asmt_condition]	Hides the **Assessable Record** field unless the evaluation method of the metric type selected in the **Assessment** field is **Assessment** (starting with the Eureka release).
Hide assessment if empty	Survey [survey_master]	Hides the **Assessment** field on the Survey form unless it contains a value (starting with the Eureka release). The system automatically populates the **Assessment** field when you migrate a survey.
Hide Survey Instance Trigger ID if Empty	Assessment Instance [asmt_assessment_instance]	Hides the **Trigger ID** field and makes it read-only unless it contains a value (starting with the Eureka release).
Hide user lists	Assessable Record [asmt_assessable_record]	Hides the **Category users** related list if the associated metric type schedule type is **On demand**.

Hide user related lists	Metric Category [asmt_metric_category]	Hides the **User** related list if the associated metric type schedule type is **On demand** and, starting with Eureka release, the **Evaluation method** is *not* **Survey**.
Hide value or String value	Assessment Instance Question [asmt_assessment_instance_question]	Hides the **Value** field and shows the **String value** field if the associated metric data type is **Date**, **Date/Time**, or **String**. Does the opposite if the data type is anything else. Available starting with the Eureka release.
Live feed deletion warning	Assessable Record [asmt_assessable_record]	Displays a warning message if an assessment administrator clears the **Live feed** check box.
Method -- Show/Hide Not Applicable	Assessment Metric [asmt_metric]	Hides the **Mandatory** and **Allow not applicable** fields and sets both values to **false** if the metric method is **Script**. Shows the **Mandatory** field if the metric method is **Assessment**. Shows the **Allow not applicable** field if the method is **Assessment** except when the data type is **Percentage** or, starting with the Eureka release, **Checkbox**, **Date**, **Date/Time**, **Number**, or **String**.
Min/Max Control	Assessment Metric [asmt_metric]	Makes the **Min** and **Max** fields mandatory except when the data type is **Template**.
Min/Max Read-only	Assessment Metric [asmt_metric]	Makes the **Min** and **Max** fields read-only when the data type is **Choice** or **Likert Scale** (starting with the Eureka release).
Populate Groups	Assessment Metric Type [asmt_metric_type]	Populates the available values for the **Filter field** with fields from the selected metric type table.
Read only Type	Metric Category [asmt_metric_category]	Makes the **Type** field read-only when it contains a value.
Reload Decision Matrix Filter Columns	Assessment Metric Type [asmt_metric_type]	Populates the available choices for the **Default matrix filter** as appropriate if the **Filter field** value changes.
Reload default filters	Assessment Metric Type [asmt_metric_type]	Populates the available choices for the **Default filter** as appropriate if the **Display all filters** value changes.
Set scale factor	Assessment Metric Type [asmt_metric_type]	Reserved for future use.
Set table field	Metric Category [asmt_metric_category]	Sets the category **Table** value to that of the metric type.
Show and Hide Scheduled Job	Assessment Metric Type [asmt_metric_type]	Hides the **Scheduled job** field if the **Schedule type** is **On demand** and shows the **Scheduled job** field if the **Schedule type** is **Scheduled**.
Show and Hide Scheduled Job Survey View	Assessment Metric Type [asmt_metric_type]	Shows the **Scheduled job** field on the Survey Definition form if the **Schedule period** is **Daily**, **Weekly**, **Monthly**, or **Yearly** (starting with the Eureka release).
Toggle Metric Definitions (Load)	Assessment Metric [asmt_metric]	Displays the **Assessment Metric Definitions** related list if the data type is **Choice** or **Likert Scale**.
Toggle Metric Definitions (Update)	Assessment Metric [asmt_metric]	Displays the **Assessment Metric Definitions** related list if the data type is **Choice** or **Likert Scale**. Sets the **Method** field to the appropriate value if the data type is compatible with one method only.
Update Min And Max Default Values	Assessment Metric [asmt_metric]	Sets reasonable default values for the **Min** and **Max** fields, based on the data type.
Validate Probability	Survey Trigger Condition [asmt_condition]	Ensures that the **Probability (%)** value is a whole number between **1** and **100** (starting with the Eureka release).
Verify Max	Assessment Metric [asmt_metric]	Verifies that the **Max** value is greater than the **Min** value and greater than or equal to zero if the metric method is **Assessment**.
Verify Min	Assessment Metric [asmt_metric]	Verifies that the **Min** value is less than the **Max** value and greater than or equal to zero if the metric method is **Assessment**.
Verify Value	Assessment Metric Definition [asmt_metric_definition]	Verifies that the **Value** is greater than or equal to zero.

Verify Value	Assessment Template Definition [asmt_template_definition]	Verifies that the **Value** is greater than or equal to zero.

Business Rules

Assessments includes the following business rules.

Name	Table	Description
Assessable domain matches type	Assessable Record [asmt_assessable_record]	Ensures that all new assessable records are in the same domain as the metric type. This is a special requirement of assessment domain separation, that all records must be in the same domain.
Auto stakeholder creation	Assessment Category User [asmt_m2m_category_user]	Assigns new category users as stakeholders automatically for assessable records if the associated category has the **Create stakeholders** check box selected.
Auto stakeholder creation	Category Assessable Records [asmt_m2m_category_assessment]	Creates stakeholders from all of a category's category users automatically for new assessable records if: • The **Create stakeholders** check box is selected for the metric category. • The same metric category is associated to the new assessable record.
Auto stakeholder creation	Metric Category [asmt_metric_category]	Assigns all of a category's category users as stakeholders for each assessable record associated to the category when the **Create stakeholders** check box is selected for the category.
Calculate category max weight	Assessment Metric [asmt_metric]	Calculates the sum of all metric weights in a category.
Cancel notification workflow	Assessment Instance [asmt_assessment_instance]	Cancels the workflow that generates assessment email notifications when an assessment instance is deleted or changes state to **Complete** or **Canceled**.
Category domain matches type	Metric Category [asmt_metric_category]	Ensures that all new categories are in the same domain as the metric type. This is a special requirement of assessment domain separation, that all records must be in the same domain.
Check Live Feed Groups	Assessable Record [asmt_assessable_record]	Selects the **Live feed** check box if a live feed group is associated with the source record. If the **Live feed** check box is selected and no live feed group is associated with the source record, this business rule clears the check box.
Check only one default	Bubble Chart [asmt_bubble_chart]	Ensures there is only one default bubble chart for a metric type (starting with the Eureka release).
Check only one default	Decision Matrix [asmt_decision_matrix]	Ensures there is only one default decision matrix for a metric type.
Create actual results	Assessment Instance [asmt_assessment_instance]	Generates assessment and category results from the user responses if a user completes an assessment.

Create Business Rule on Remote table	Assessment Metric Type [asmt_metric_type]	Generates the following business rules if an assessment administrator creates or updates a metric type: • Business rule called **Auto business rule for Assessments**, which monitors the **Table** selected for the metric type. When someone adds a record that meets the metric type conditions, this business rule generates an assessable record. If someone changes the metric type's **Table** or conditions, the **Create Business Rule on Remote table** business rule updates the automatic business rule script to reflect the changes. • Business rule called **Auto deletion rule for Assessments**, which prevents users from deleting a record on the metric type's **Table** if the record is associated to metric or category results. If the record has no associated results and a user deletes it, this business rule deletes any associated assessable records. The **Create Business Rule on Remote table** business rule generates automatic business rules only for metric types with **Evaluation method** set to **Assessment** (starting with the Eureka release).
Create Scheduled Job	Assessment Metric Type [asmt_metric_type]	**Assessments:** Generates a scheduled job for the creation of assessment components if *either* of these conditions is met: • Someone creates a new metric type with the schedule type set to **Scheduled**. • The schedule type changes from **On demand** to **Scheduled**. **Surveys:** Generates a scheduled job for the creation of survey components if the schedule period for a survey definition is set to **Daily**, **Weekly**, **Monthly**, or **Yearly** (starting with the Eureka release).
Create Survey Records	Assessment Metric Type [asmt_metric_type]	Generates various records and populates certain fields on those records when someone creates a new survey definition, which is a metric type with **Evaluation method** set to **Survey** (starting with the Eureka release). More specifically, this business rule generates a survey category and assessable record, both associated to the survey definition.
Create UI Action on Remote table	Assessment Metric Type [asmt_metric_type]	Reserved for future use.
decision_matrix_axis	Global [global]	Limits available categories for X- and Y-axes to those that belong to the type if there is a metric type specified on the Decision Matrix form.
Delete Live Feed Group	Assessable Record [asmt_assessable_record]	Deletes the assessable record's live feed group, if there is one, when an assessment administrator deletes an assessable record.
delete related users	Category Assessable Records [asmt_m2m_category_assessment]	Deletes any stakeholders for the assessable record and category when an assessment administrator disassociates a category from an assessable record.
Do not allow category to change	Assessment Metric [asmt_metric]	Prevents the **Category** field from being changed if there are any conditional question dependencies related to the current record (starting with the Eureka release).
Do not allow datatype to change	Assessment Metric [asmt_metric]	Prevents the **Data type** and **Template** fields from being changed if there are any conditional questions that depend on the current record (starting with the Eureka release).
Ensure Types Match	Assessment Metric [asmt_metric]	Sets the type of a metric to the type of the associated category.
Ensure types match	Assessment Stakeholders [asmt_m2m_stakeholder]	Ensures users can only create a stakeholder from a category user and assessable record of the same type.
Ensure types match	Category Assessable Records [asmt_m2m_category_assessment]	Prevents users from associating categories of one type to an assessable record of a different type.
Evaluate filters	Assessable Record [asmt_assessable_record]	Performs the following after the system generates a new assessable record: • Checks all filter conditions for categories in the type. • Automatically associates the new assessable record to all categories for which it meets the category filter conditions.

Generate assessment trigger condition	Trigger Condition [asmt_condition]	Generates a business rule the survey or assessment trigger condition uses to send surveys or assessments (starting with the Eureka release).
getStakeholders	Global [global]	Ensures that only category users for categories associated with the assessable record are available on the Assessable Record form when users edit the **Category users** related list.
Link assessable record and category	Metric Category [asmt_metric_category]	Sets these hidden fields as follows for a newly created survey category: • **Table:** Assessment Metric Type [asmt_metric_type] • **Filter:** <sys_id of the survey definition the new survey category is associated with> Available starting with the Eureka release.
Live Feed Group	Assessable Record [asmt_assessable_record]	Creates a live feed group for the assessable record, if one does not exist, when the record is saved with the **Live feed** check box selected. If the check box is then cleared and the record saved, this business rule deletes an existing live feed group.
Metric domain matches category	Assessment Metric [asmt_metric]	Ensures that all new metrics are in the same domain as the category to which they belong. This is a special requirement of assessment domain separation, that all records must be in the same domain.
Notify assessment user	Assessment Instance [asmt_assessment_instance]	Starts a workflow that sends an email notification to the assigned user when an assessment instance changes to the **Ready** state or the user to which it is assigned changes. The workflow generates other assessment email notifications at later stages.
Prevent recursive dependencies	Assessment Metric [asmt_metric]	Prevents the **Depends on** field from being set in a way that creates a recursive conditional question dependency (starting with the Eureka release).
Publish Survey	Assessment Metric Type [asmt_metric_type]	Generates survey instances and assigns them to the associated survey users when the survey definition state changes from **Draft** to **Published** (starting with the Eureka release).
Remove auto create Business Rules	Assessment Metric Type [asmt_metric_type]	Deletes the automatically created business rule for a metric type when an assessment administrator deletes that metric type.
Remove auto create UI Actions	Assessment Metric Type [asmt_metric_type]	Reserved for future use.
Remove auto created business rule	Survey Trigger Condition [asmt_condition]	Deletes the automatically created business rule when someone deletes the survey trigger condition (starting with the Eureka release).
Remove Scheduled Job	Assessment Metric Type [asmt_metric_type]	**Assessments:** Deletes the scheduled job for a metric type if *either* of these conditions is met: • Someone deletes the metric type. • Someone changes the schedule type from **Scheduled** to **On demand**. **Surveys:** Deletes the scheduled job for a survey definition if the schedule period is set to **Only Once** or **No Limit** (starting with the Eureka release).
Reset Min/Max for metric	Assessment Metric Definition [asmt_metric_definition]	Updates the **Min** and **Max** fields for metrics and survey questions based on the metric definition **Value** (starting with the Eureka release).
Set Domain for M2M Cat Assessable Recs	Category Assessable Records [asmt_m2m_category_assessment]	Ensures that assessable records are only associated to categories in the same domain. This is a special requirement of assessment domain separation, that all records must be in the same domain.
Set Domain for M2M Category Users	Assessment Category User [asmt_m2m_category_user]	Ensures that users are only linked to categories in the same domain. This is a special requirement of assessment domain separation, that all records must be in the same domain.
Set Domain for M2M Stakeholders	Assessment Stakeholders [asmt_m2m_stakeholder]	Ensures that assessable records are only linked to category users in the same domain. This is a special requirement of assessment domain separation, that all records must be in the same domain.

Set scratchpad fields	Assessment Metric Type [asmt_metric_type]	Caches field values for use by other scripts that run on the Assessment Metric Type form.
Store view type	Metric Category [asmt_metric_category]	Ensures that the **Type** field only allows users to select metric types used for assessments (starting with the Eureka release).
Synchronize category survey users	Assessment Category User [asmt_m2m_category_user]	Ensures that the same users are associated with all of a survey's categories (starting with the Eureka release).
Synchronize survey users and stakeholder	Metric Category [asmt_metric_category]	Adds all users associated with a survey's existing categories to any newly created category for that survey (starting with the Eureka release).
Update Category Count	Assessment Metric [asmt_metric]	Updates the value in the **Total metrics** field on the Metric Category form when metrics are added to and deleted from the category.
Update records that match filter	Metric Category [asmt_metric_category]	Automatically performs these tasks when an assessment administrator edits the **Filter** field: • Associates the category to assessable records that meet the filter conditions. • Disassociates the category from assessable records that do not meet the filter conditions. The **Assessable records** related list reflects these changes when the record is saved.
Update scheduled job on schedule change	Assessment Metric Type [asmt_metric_type]	Updates the survey creation scheduled job to reflect schedule period changes (starting with the Eureka release).
Validate mandatory and not applicable	Assessment Metric [asmt_metric]	Sets the **Mandatory** and **Allow not applicable** fields to **false** if the metric method is **Script**. If the metric data type is **Percentage**, the business rule sets the **Allow not applicable** field to **false**.
Verify min/max	Assessment Metric [asmt_metric]	Ensures that the **Min** is greater than or equal to zero and less than the **Max**. Sets the **Min** to 0 and the **Max** to 1 if the data type is **Checkbox** or **Yes/No** (starting with the Eureka release).
Verify value	Assessment Template Definition [asmt_template_definition]	Ensures that the metric template definition **Value** is: • Greater than or equal to zero. • Different from the **Value** for all other metric template definitions related to the template (starting with the Eureka release).
Verify value	Assessment Metric Definition [asmt_metric_definition]	Ensures that users can only enter a metric definition **Value** greater than or equal to zero. Ensures that the metric definition **Value** is different from the **Value** for all other metric definitions related to the metric (starting with the Eureka release).

Using

Completing Surveys

Overview

All available surveys assigned to you appear in your personal assessment and survey queue. No special role is required to complete a survey but you must be logged in and the survey must be assigned to you. When you submit a survey, the system stores your responses.

Survey Notifications

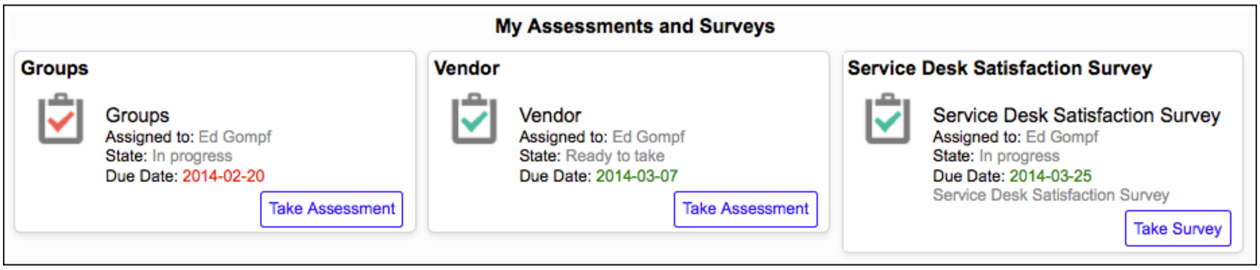
If configured to send email, the system sends you a notification when a survey is assigned to you. The message contains a link to the survey and instructions for viewing the assessment and survey queue. Administrators can view and modify the default notification, called **Survey User Invite**, by navigating to **System Policy > Email > Notifications**.

Taking a Survey

Your assessment and survey queue displays all assessments and surveys assigned to you that are available for completion. Each assessment or survey appears as a card in the queue. The card contains helpful information, including the survey name, state, and due date, and a button to launch the questionnaire. Overdue surveys are clearly marked with a red icon and red due date. You must answer every mandatory question, indicated by a red bar, before you can submit the survey. If you start to take a survey but cannot complete it, save your responses and return to it later. When you have answered all the questions and are satisfied with the responses, submit the survey. By default, you cannot modify your answers to a survey after submission. However, if the administrator has configured this survey to allow retakes, you can edit your answers and resubmit the survey. Completed surveys configured for retake remain in the queue until their due date and display the **Modify Survey** button on the card. The ability to resubmit surveys is available starting with the Fuji release.

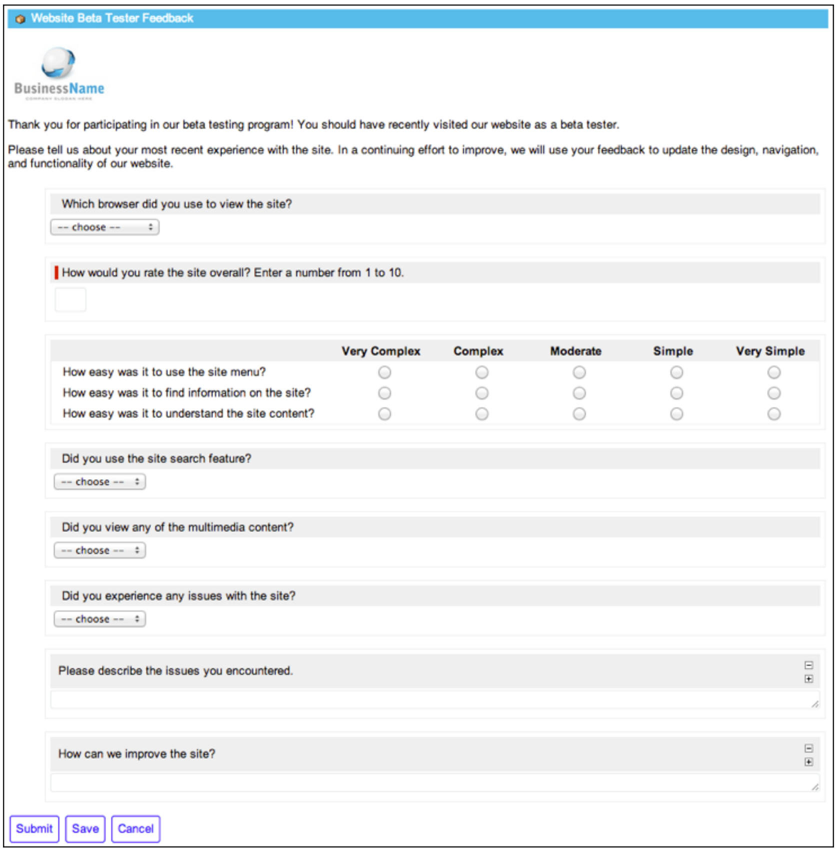
To view your queue and take a survey:

1. Navigate to **Self-Service > My Assessments & Surveys**.



   Note: Users with the assessment_admin role, including survey administrators, can display other users' assessments and surveys in addition to their own. Use the **Show all** and **Show assigned to me** related links at the bottom of the queue to show and hide assessments and surveys. Click a card assigned to another user to open the associated metric type or survey definition.

2. Click **Take Survey** on a survey card to open the questionnaire.



If there is more than one survey category, you can click the collapse ( ) or expand ( ) icon to hide or show the questions in the category.

3. Answer each question to the best of your ability.

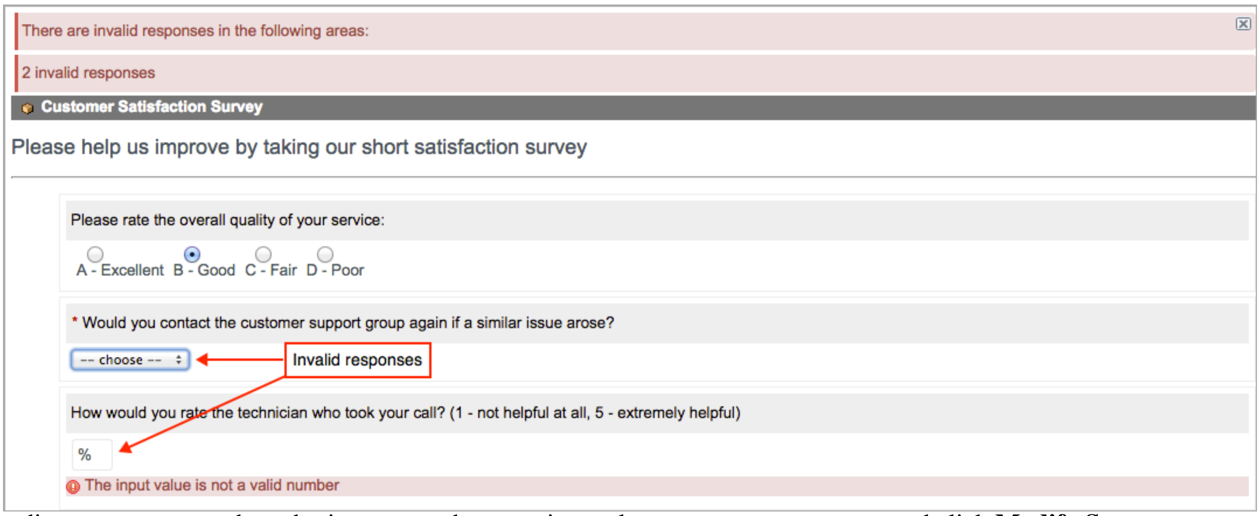
   If you are unsure of how to respond to a question or if a question does not apply to a particular record, select **Not Applicable**, if available.

4. Read any *assertions* present at the end of the questionnaire and acknowledge with a signature, if required.

   A signature requires you to select a check box or authenticate your full name, which the system displays in a read-only field. You cannot submit your answers to the survey until you provide the required signature.

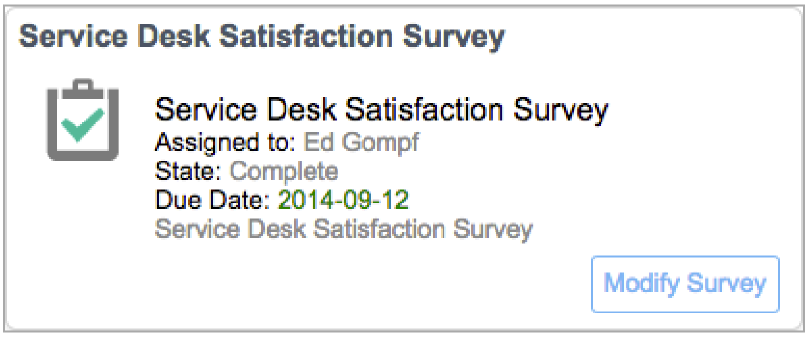
5. Save or submit the survey.
   - **Save:** Saves your responses without submitting them. You can close the questionnaire and access it later from your queue.
   - **Submit:** Submits the completed survey when you are finished.
6. If prompted, enter your user name and password to verify your full name signature.

   If all the questions are answered with valid values, a success message appears. If the system detects an unanswered mandatory question or invalid response, the assessment is not submitted, and a message appears at the top of the questionnaire explaining the error. Problematic questions are temporarily highlighted.



7. To edit your answers and resubmit a survey that permits retakes, return to your queue and click **Modify Survey** in the card.

   You can modify your responses to the survey until its due date.



Administering

Survey Creator

Overview

The survey creator allows survey administrators to quickly create basic surveys. Add questions and choose the type of user access in one convenient page, rather than creating each record manually. The survey creator cannot be used to edit existing surveys. If necessary, you can edit a survey, add and modify questions, and perform advanced actions later by managing the various survey components created by the survey creator. The survey creator is available for the Eureka release only and is replaced by the Survey Designer, starting with the Fuji release.

Note: *Before you create a survey, you might want to create question templates to use on the survey or create survey user groups to quickly assign the survey to users.*

Creating Surveys

To create a survey in the survey creator:

1. Navigate to **Survey Management > Create Survey**.
2. Enter the following information for the survey:
   - **Name:** [Required] Enter a title for the survey.
   - **Description:** Enter helpful information about the survey.
3. [Optional] Create one or more questions.

   Specify an answer data type and, if applicable, answer options for each question.

   Note: There must be at least one valid question to publish or preview the survey. Surveys with no questions can be saved in the **Draft** state only.
4. [Optional] Click **Preview** to preview the questions as they will appear on the survey. This button is available only if there is at least one valid question.

   A preview appears in a pop-up window. You cannot submit a preview of a survey. Click **Close** to return to the survey creator.
5. Set user access for the survey and, if applicable, select recipients.
6. [Optional] Copy the **Survey URL** to distribute to users. You can also access the URL later.

   The **Survey URL** field in the Next Steps section displays a URL that various users can use to open the survey questionnaire, assuming the survey is active and published. If the survey is public to users or associated with a trigger condition, the URL works for all users. If the survey is associated with specific users or groups, the URL works for those users only. For more information, see Sharing Survey URLs.
7. Click the appropriate button to save the survey:
   - **Save as Draft:** Saves the survey in the **Draft** state. Users who try to use the survey URL receive an error message until the survey is published. You can publish the survey later.
   - **Publish:** Available only when there is at least one valid question. Saves the survey in the **Published** state and generates survey instances assigned to each designated user or to the users in each designated group, if

applicable. Users who have email addresses stored in the system also receive email invitations to take the survey, assuming email notifications are configured.

Do not click **Publish** if you are not ready for users to take the survey. For example, you might want to make certain questions mandatory or edit the order of questions before you assign the survey to users. You can send the survey to users later.

When you save or publish the survey from the survey creator, the system automatically creates all the required survey components that you can edit and use to set advanced options for the survey. For more information, see Components Created.

Adding Survey Questions

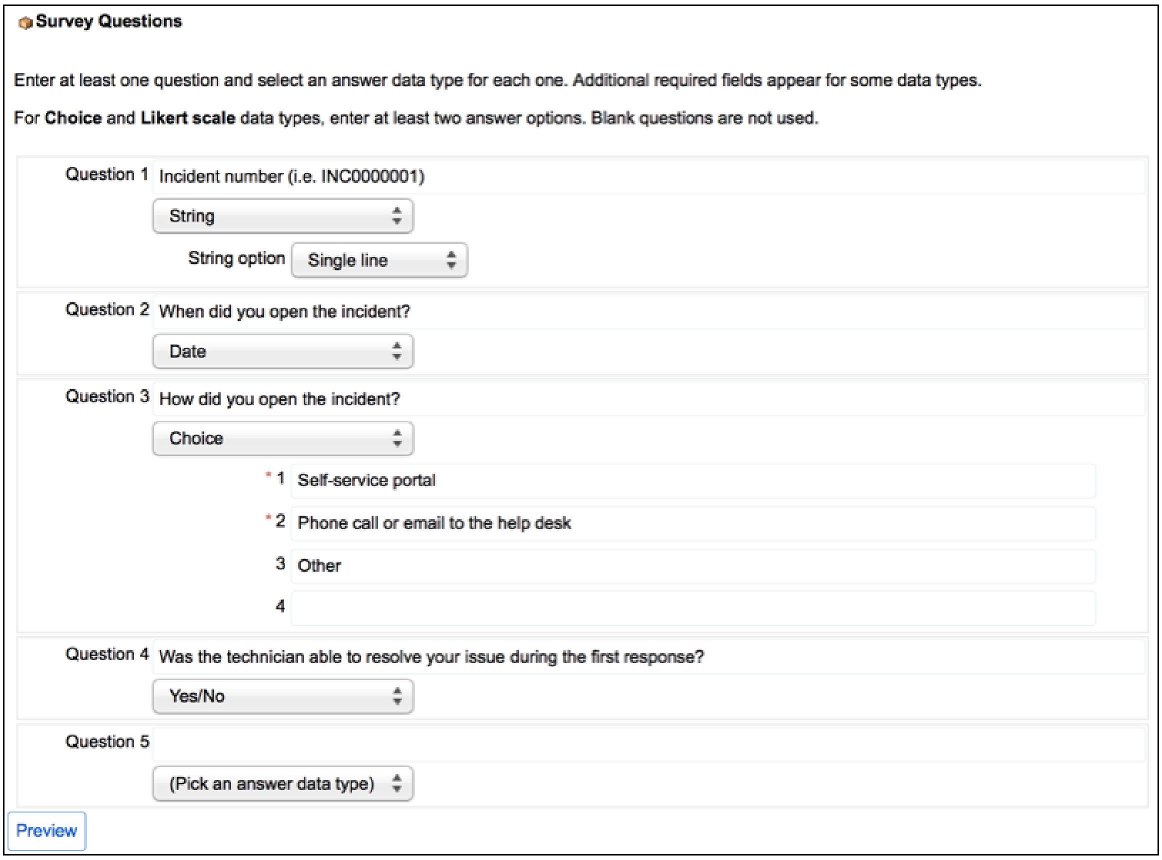
Add questions to your survey using the Survey Questions section of the survey creator. For each question, enter question text as you want it to appear on survey questionnaires. When you enter a character in the question entry field, fields appear for you to create the next question.

For each survey question, you must choose an answer *data type* from the list. The data type determines how users answer the question on questionnaires. The data types described below are available for surveys. For more information, see Survey Question Data Types that contains details about additional options available for certain data types.

Note: *You do not have to add questions using the survey creator. However, there must be at least one valid question before you can publish or preview the survey.*

Data type	Description
Checkbox	Users select or clear a check box beside a statement.
Choice	Users select a value from a list of custom answer options. When you select **Choice**, fields appear for you to enter the answer option text. You must enter at least two answer options.
Date	Users select a date.
Date/Time	Users select a date and time.
Likert Scale	Users select a multiple choice value from a custom Likert scale [1] of answer options. Each answer option is represented by a radio button on the scale. When you select **Likert Scale**, a field appears for you to enter the answer option text. When you enter a character in this field, another field appears below it for the next answer option on the scale. You must enter at least two answer options.
Number	Users enter a number. When you select **Number**, the following fields appear: • **Min:** Enter the lowest positive whole number that users will be able to enter on survey questionnaires. The default value is **0**. • **Max:** Enter the highest positive whole number that users will be able to enter on survey questionnaires. The default value is **10**.
Percentage	Users enter a number. When you select **Percentage**, the following fields appear: • **Min:** Enter the lowest positive whole number that users will be able to enter on survey questionnaires. The default value is **0**. • **Max:** Enter the highest positive whole number that users will be able to enter on survey questionnaires. The default value is **100**.

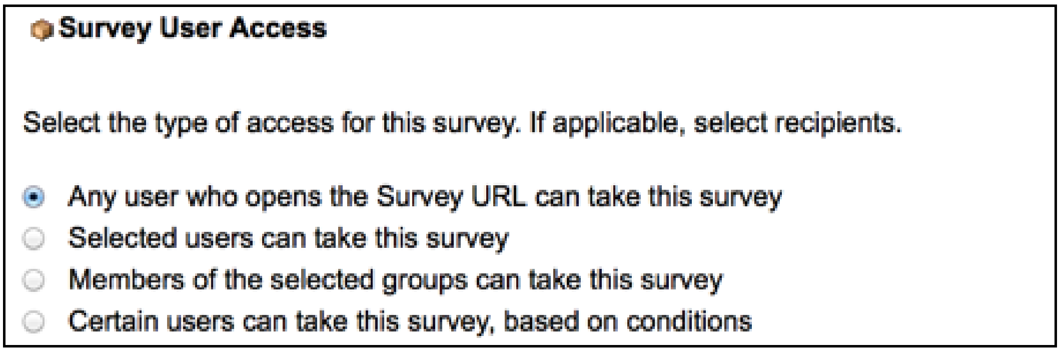
String	Users enter text. When you select **String**, the **String option** field appears. Select one of the following options to determine how the string field appears on questionnaires: • **Single line** • **Single line wide** • **Multiline**
Template	Users select a value from a predefined scale of answer options. When you select **Template**, the **Template option** field appears. Select a template to use for the answer options.
Yes/No	Users select **Yes** or **No** from a list.



Note: *If needed, you can change the order of survey questions after you save the survey.*

Setting User Access

Select one of the options in the Survey User Access section to determine who can take the survey (see table for details).



Option text	Description
Any user who opens the Survey URL can take this survey	Enables any user to take the survey using the URL in the **Survey URL** field, assuming the survey is published. Send the URL to users as needed. **Note:** If you add survey users later, the survey becomes restricted and only those users can take the survey.
Selected users can take this survey	Restricts the survey so only the designated survey users can take it. You can add or remove survey users later. Select users with the slushbucket. You can filter based on any field on the User [sys_user] table.
Members of the selected groups can take this survey	Restricts the survey so only members of the designated user groups can take it. The system associates the survey with the users in the selected groups, who become survey users. You can add or remove survey users later. The system does *not* dynamically add or remove survey users based on changes to the group members. Select groups with the slushbucket. You can filter based on the group name. By default, the list displays groups of the **survey** type only. You must create these groups in advance to use them. Select **Show all groups** to display all user groups.
Certain users can take this survey, based on conditions	Indicates how the survey will be distributed when specific actions occur on a table. You must create a trigger condition to define a table association with the survey, actions that trigger survey distribution, and users who receive the survey. Click **Save as Draft** or **Publish** at the bottom of the survey creator to open the Trigger Condition form.

Components Created

When you save or publish the survey using the survey creator, the system creates the following survey components automatically. Some components are always created, while others are created only under certain circumstances.

Component	When Created	Details
Survey definition	Always	The system creates one survey definition record based on the **Name** and **Description** you enter. The survey definition is the root record on which the survey is built. Additional configuration options are available on the Survey Definition form.
Survey category	Always	The system creates one survey category record based on the **Name** you enter. The survey category stores the survey questions.
Survey questions	There is at least one valid question	The system creates one survey question record per valid question you enter. Each survey question record contains the question text, the answer data type, and configuration options you can edit later on the Survey Question form.
Survey question answer options	A question with the **Choice** or **Likert Scale** data type contains at least two answer options	The system creates one answer option record per answer option you enter. Each answer option is associated with the question you enter it under. Each answer option record contains the answer option text and a numerical value that determines the order in which it appears relative to other answer options for the same question. The value also contributes to survey response score calculations that should be used by advanced survey administrators only.

Survey users	At least one user or group is selected in the Survey User Access section	The system creates one survey user record per user you select or per member of the group you select. Each survey user record signifies a user who has access to a restricted survey.

Fine-Tuning Surveys

The survey creator allows you to create basic surveys only. Additional capabilities are available when you edit survey components directly.

- Set additional options for the survey on the Survey Definition form.
  - Add introductory and closing text to the survey by filling in the **Introduction** and **End note** fields.
  - Collect anonymous survey responses by selecting the **Anonymize responses** check box.
  - Set the **Schedule period** field to limit how often a user can take the same survey and to schedule automatic survey generation.
- Create additional survey categories.
- Set additional options for survey questions on the Survey Question form. Some options are available only for certain data types.
  - Make a question mandatory by selecting the **Mandatory** check box.
  - Randomize the order in which answer options appear by selecting the **Randomize answers** check box.
  - Add a **Not Applicable** answer option to a question by selecting the **Allow not applicable** check box.
  - Make a question conditional so it appears only when users answer another question a certain way. Fill in the **Depends on** and **Displayed when** fields to do so.
  - Change the way a question's responses are scored by setting the **Scale definition** field.

References

[1] http://en.wikipedia.org/wiki/Likert_scale

Survey Definitions

Note: *This article applies to Fuji and earlier releases. For more current information, see Survey Definitions* [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

A survey definition is the root record on which a survey is built. The survey designer generates a survey definition automatically when you save or publish the survey. Survey administrators might want to modify the survey definition to configure additional options for the survey or publish the survey when it is ready for distribution.

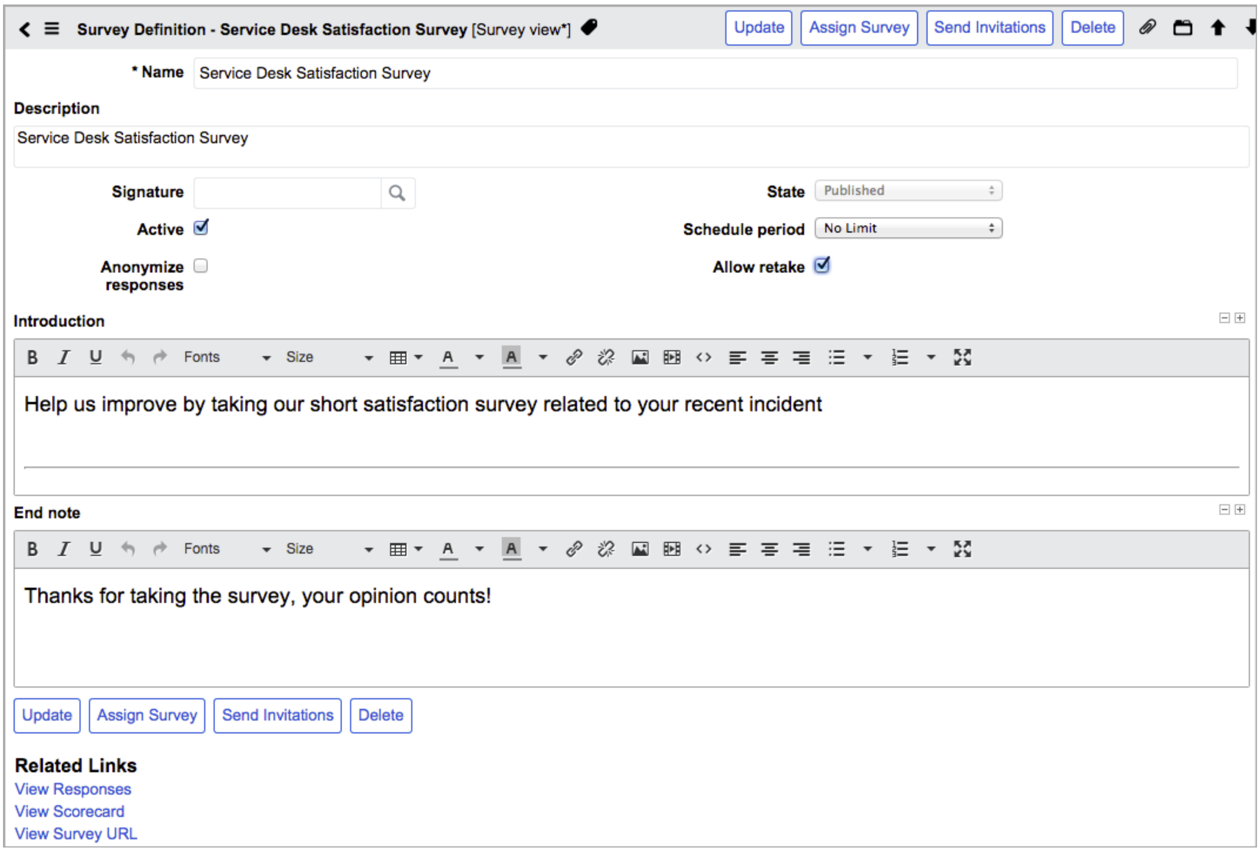
Survey administrators and survey readers can also send survey invitations directly from the survey definition. For more information, see Sending Survey Invitations to Users.

Modifying Survey Definitions

To configure additional options for a survey:

1. Navigate to **Survey Management > View Surveys**.

   Each survey definition is stored as a record on the Assessment Metric Type [asmt_metric_type] table with a modified view for survey use.
2. Open a survey definition.
3. Modify the fields on the Survey Definition form, as appropriate (see table).
4. Save the record.



Field	Description
Name	[Required] Name of the survey, which appears on the questionnaire.
Description	Helpful information about the survey.
Active	Check box that determines whether the survey definition is active. When the **Active** check box is cleared, new survey instances cannot be generated and users cannot complete existing survey instances. Use the **Active** check box to deactivate or activate a survey that is published.
Anonymize responses	Check box that, when selected, ensures that all responses for this survey are stored without the submitting users' names. When a user submits a survey questionnaire, the system clears the **Assigned to** field for the associated survey instance. Additionally, survey responses for anonymous surveys do not contain **Assigned to** values.
State	[Read-Only] Status of the survey: **Draft** or **Published**.
Signature	[Optional] Acknowledgement by a survey recipient of requirements, admonitions, or policies related to the survey. The signature might require the recipient to select a check box or type a full signature to verify having read these *assertions*. You can display assertions without requiring a signature. Select an existing signature from the list or click **New** to create a new one. The signature form contains these fields: • **Name:** Descriptive name for this signature. • **Signature type:** Type of signature required. The selections are **Checkbox**, **Full name**, or **Assertion only**. If **Assertion only** is selected, no signature is required to submit the survey. • **Assertion:** Text you want to display to recipients. By default, a property called Require authentication for user signature requires users to authenticate when providing a full name signature. Signatures are available starting with the Fuji release.
Schedule period	Option that determines how often a user can take the same survey and whether the system automatically generates survey instances on a schedule. For more information, see Schedule Periods. **Note:** If you use a trigger condition for a survey, ensure the schedule period is set to **No Limit**. Trigger conditions use a different method to regulate how often users can receive survey instances.
Allow retake	Check box that allows users to modify their answers to a completed survey. Users can resubmit a survey as many times as they want until the due date. After that date, the system removes the survey from the user's My Assessments and Survey's page. This field is available starting with the Fuji release.
Scheduled job	[Admin only] Scheduled job the system automatically creates for this survey definition when the schedule period is a repeating interval. The system sets the scheduled job to run according to the selected schedule period. If you change the schedule period and save the survey definition, the system deletes the old scheduled job and, if you selected a recurring schedule period, creates a new scheduled job. For example, if you change the schedule period from **Daily** to **Weekly** and save the record, the system deletes the daily scheduled job and creates a weekly one set to run a week from the current date. This field is visible to administrators only if the schedule period is **Daily**, **Weekly**, **Monthly**, or **Yearly**.
Introduction	Introductory content to display on survey questionnaires. Consider adding a company logo, a welcome message, background information about the survey, or instructions.
End note	Content to display on the screen that appears when someone submits a survey questionnaire. Consider adding a thank you message, followup instructions, or other applicable information.
Assessment duration	Amount of time survey recipients have to complete their assigned survey instances, starting from the time the survey instance is generated. The assessment duration sets the **Due date** for each survey instance. The default duration is 14 days. You may need to configure the form to see this field.
Send notifications	Select the check box to send notifications for the survey when it is published. You may need to configure the form to see the field. The field is available starting with the Fuji release.
Related Links	
View Responses	Link that opens the list of responses for this survey. This related link is available only if there are results for the survey.
View Scorecard	Link that opens the scorecard for this survey. This related link is available only if there are results for the survey.
View Survey URL	Link that opens a dialog box that displays a URL for this survey. This related link is available only if the **Active** check box is selected. Note that the URL does not work until the survey definition is published.

Related Lists	
Metric Categories	All survey categories for this survey.
Survey Users	All survey users who are authorized to take this survey. If no users are listed, any user can take this survey.
Assessment Instances	All survey instances for this survey. You may need to configure the form to see this related list. **Note:** If you add this related list to the form, use list control to omit the **New** button. Survey instances must be generated by the system to produce functional surveys.

Schedule Periods

The available schedule periods are **Only Once**, **No Limit**, **Daily**, **Weekly**, **Monthly**, and **Yearly**. The default schedule period is **No Limit**. When you set the schedule period to anything but **Only Once** or **No Limit**, the system automatically creates a corresponding scheduled job. The scheduled job does the following:

- Ensures that a user can take one survey instance of the same survey per schedule period.
- Generates a new survey instance for each survey user at the beginning of the new schedule period, as long as the survey user does not have an incomplete instance of that survey. A survey instance is incomplete if the state is not **Complete**.

For example, if you set the schedule period to **Monthly** and someone attempts to send survey invitations twice in the same day, the system generates survey instances for the survey users the first time only. At the beginning of the next schedule period, the system generates another survey instance for each survey user who completed the previous one.

Schedule periods are enforced by the **Expiration date** field on the survey instance. As long as the survey instance expiration date has not passed, the assigned user cannot receive a new survey instance. When the system generates a survey instance and the schedule period is anything but **No Limit**, the **Expiration date** field is automatically set to the appropriate date. For example, if the schedule period is **Weekly**, the expiration date is a week after the survey instance is generated.

If you change the schedule period, the scheduled job updates automatically to the correct schedule. However, users who have survey instances for the survey cannot receive new survey instances until their existing survey instances expire, regardless of the new schedule period. Consider the following example: Sal Pindell receives a survey instance when the schedule period is **Weekly**. The next day, a survey administrator changes the schedule period to **No Limit**. Sal cannot receive another survey instance until one of the following actions occur:

- Seven days pass from the time Sal's survey instance was generated.
- A survey administrator deletes Sal's survey instance.

After one of these actions occurs, Sal can receive a new survey instance anytime, as long as he has no incomplete instances of the survey.

Note: *If you use a trigger condition for a survey, ensure the schedule period is set to **No Limit**. Trigger conditions use a different method to regulate how often users can receive survey instances.*

Publishing Surveys

You must publish a survey to enable people to receive and complete survey instances. The **State** field on the Survey Definition form indicates whether the survey is in the **Draft** or **Published** state. If you do not publish the survey when you use the survey creator, open a draft survey definition and click **Publish**. When you publish a survey, the system automatically generates survey instances for any associated survey users. You can assign the survey to other users manually.

Note: *A survey cannot be moved back to the* ***Draft*** *state after it has been published, though you can deactivate it by clearing the* ***Active*** *check box.*

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/administer/survey-administration/concept/c_SurveyDefinitions.html

Survey Categories and Questions

Note: *This article applies to Fuji and earlier releases. For more current information, see Survey Categories* [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

Survey categories provide a way to group questions of a similar theme for a given survey. Only one category is required for each survey, but you can create as many categories as you like.

You might want to set advanced configuration options for the questions, including making a question appear conditionally or making a question mandatory. You can also use question templates to define reusable sets of answer options.

Survey administrators can create and administer survey categories, questions, and question templates.

Note: *Changes to a survey, such as the addition of questions or the modification of question templates, do not apply to the existing survey instances immediately. However, the changes apply immediately to any new survey instances that you create after saving the changes.*

Survey Categories

There must be at least one survey category per survey definition and every survey question must be associated with a category. When you create a survey using the survey creator, the system generates one category, which all the questions belong to.

For simple surveys, one category is usually enough. Consider creating additional categories if you want to:

- Separate groups of questions into collapsible sections by category on the survey questionnaire.
- Report on category scores, which are calculated based on responses for all questions within each category.

To edit or create a category:

1. Navigate to **Survey Management > View Surveys**.
2. Open a survey definition.
3. In the **Metric Categories** related list, open a category or click **New**.

   Each survey category is stored as a record on the Metric Category [asmt_metric_category] table with a modified view for survey use.
4. Fill in the fields on the Survey Category form, as appropriate (see table).
5. Save the record.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Name</td><td>[Required] Name of the category. The category name appears on questionnaires when:
• There is more than one category for the survey.
• There is only one category and its name is different than the survey definition name. If you create a survey using the survey creator, the category name is the same as the survey definition name.</td></tr>
<tr><td>Description</td><td>Helpful information about the category.</td></tr>
<tr><th colspan="2">Related Lists</th></tr>
<tr><td>Assessment Metrics</td><td>All survey questions in this category.</td></tr>
<tr><td>Users</td><td>All survey users for this survey.</td></tr>
</table>

Survey Questions

Survey readers and survey administrators can navigate to **Survey Management > Questions** to view all survey questions. The list displays information about each question, such as the associated survey definition, which appears in the **Type** column, and the data type. Open a record to view more details about the question. Survey administrators can modify the question.

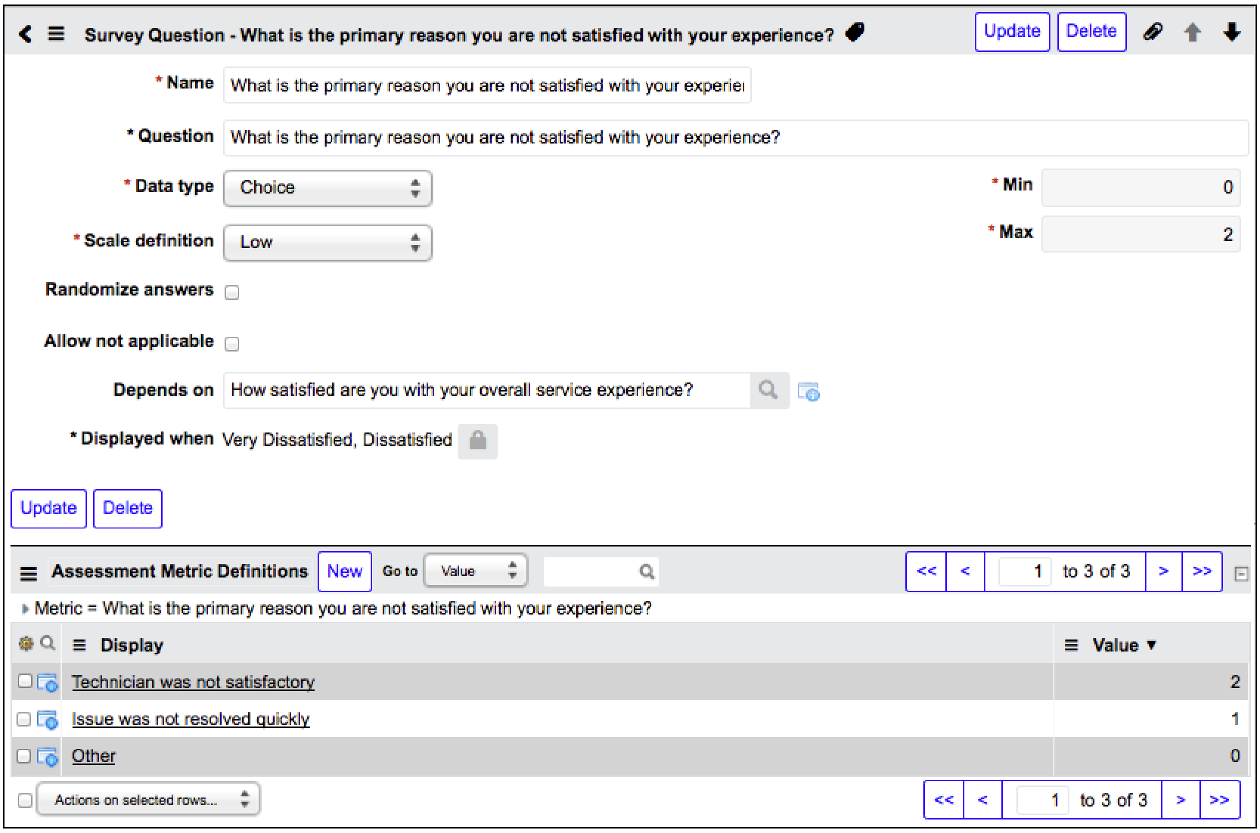
The survey creator generates questions and answer options automatically. However, it provides only the basic configuration options for questions, like the question text and the data type. You might want to create additional questions or further customize existing questions.

1. Navigate to **Survey Management > View Surveys**.
2. Open a survey definition.
3. In the **Metric Categories** related list, open a category.
4. In the **Assessment Metrics** related list, open an existing question or click **New**.

   Each survey question is stored as a record on the Assessment Metric [asmt_metric] table with a modified view for survey use.
5. Fill in the fields on the Survey Question form, as appropriate (see table).

   The specific fields available depend on the selected **Data type**.
6. Save the record.

   Be sure to create answer options if you select the **Choice** or **Likert Scale** data type.



Field	Description
Name	[Required] Name of the question. When you create a survey using the survey creator, the question name is the same as the text in the **Question** field.
Question	[Required] Text to use for the question, which appears on survey questionnaires.
Data type	[Required] Data type of the question. Depending on the data type you select, different fields may appear. **Note:** You cannot change the data type if another question depends on this question. For more information, see the **Depends on** field description.
Template	Question template to use for the answer options. This field is visible and required only if the data type is **Template**. **Note:** You cannot change the template if another question depends on this question.
Scale definition	Setting that determines whether smaller or larger numerical values equate to a good score in result calculations. Select **Low** if smaller numerical values are better, such as for a question that measures the number of incidents for a vendor. Select **High** if larger numerical values are better, such as for a question that measures user satisfaction on a scale of one to five. This field is visible and required only when certain data types are selected. For more information, see Survey Question Data Types.
Randomize answers	Check box that determines whether to present the answer options for this question in a random order each time a user opens the survey. Answer preference is sometimes influenced by the order in which answer options appear, which can result in biased results. Randomizing answer options can help prevent this bias. This field is visible only if the data type is **Choice** or **Likert Scale**. **Note:** Randomizing answer options for certain questions may make those questions confusing for the person answering. In general, only randomize answer options that do not follow a logical order.
Mandatory	Check box that makes the question mandatory (selected) or optional (cleared) on survey questionnaires. Users cannot submit questionnaires until they provide valid responses to all mandatory questions, which are denoted by a red field status indicator. This field is visible only when the **Depends on** field is empty and the data type is *not* **Checkbox**. Questions that depend on other questions and check box questions cannot be mandatory.

Allow not applicable	Check box that determines whether to include a **Not Applicable** answer option for this question on survey questionnaires. User responses of **Not Applicable** are excluded from results calculations. This field is visible only if the data type is **Choice**, **Likert Scale**, **Template** or **Yes/No**.
Depends on	Setting used to make this a conditional question, meaning it only appears when users answer another question a certain way. To make a question depend on another question, select an existing question from the list, which displays **Checkbox**, **Choice**, **Template**, and **Yes/No** questions of the same category as this question. Then, use the **Displayed when** field to set the conditions that cause this question to appear on surveys. The system prevents the creation of recursive dependencies between questions. For example, if Question A depends on Question B, Question B cannot depend on Question A. The triggered survey example demonstrates how to create and use conditional questions.
Displayed when	Answer options for the selected **Depends on** question which, when chosen on surveys, display this question. This field is visible and required only when the **Depends on** field is set.
Min	Smallest numerical value to be used as an answer option for this question. This field is visible and required only if the data type is **Choice**, **Likert Scale**, **Number**, or **Percentage**.
Max	Largest numerical value to be used as an answer option for this question. This field is visible and required only if the data type is **Choice**, **Likert Scale**, **Number**, or **Percentage**.
String option	Selection that determines what kind of response text box appears for this question on survey questionnaires. This field is visible and required only if the data type is **String**.
Related Lists	
Assessment Metric Definitions	Answer options for this question. This related list is available only if the **Data type** is **Choice** or **Likert Scale**.

Creating Answer Options

You must create answer options, called metric definitions, for survey questions that have **Data type** set to **Choice** or **Likert Scale**.

1. Open a choice or Likert scale survey question.
2. In the **Assessment Metric Definitions** related list, open a metric definition or click **New**.

   Each answer option is stored as a record on the Assessment Metric Definition [asmt_metric_definition] table.
3. Fill in the fields on the Assessment Metric Definition form, as appropriate (see table).
4. Click **Submit**.

Field	Description
Display	[Required] Text to appear as the answer option.
Value	[Required] Numeric value, greater than or equal to zero, to which the answer option equates. Values determine the order in which answer options appear. Values are also used to calculate survey results. For more information, see the example below this table. To prevent reporting confusion, no two metric definitions for a given question can have the same **Value**.

On survey questionnaires, the answer options for a question appear in order from smallest to largest **Value**. For example, consider the survey question **How do you feel?** with the answer options **Good**, **Neutral**, and **Bad**. The following table shows the answer option order based on the **Value**.

Answer Option	Value	Order
Good	1	First
Neutral	3	Second
Bad	5	Third

If you use survey result calculations, ensure the question **Scale definition** is set appropriately based on the answer options. In the previous example, if you want the answer option **Good** to earn the highest score, the scale definition should be **Low** because **Good** has the smallest value.

Changing the Order of Survey Questions

It is simple to reorder survey questions at the category level or the question level.

You can change the order in which the questions in one category appear relative to those in other categories for the same survey definition. Navigate to **Survey Management > View Surveys** and open the appropriate survey definition. In the **Metric Categories** related list, edit the values in the **Order** column.

You can also change the order of questions within a category. On the Survey Category form, in the **Assessment Metrics** related list, edit the values in the **Order** column. You might want to change the order of questions if you add a new question manually after creating other questions using the survey creator. When you create questions using the survey creator, the system sets the **Order** field for the first question to **101**, the second to **102**, and so on. When you create a new question outside of the survey creator, the **Order** is set to **100** by default, which means it appears before all questions generated by the survey creator.

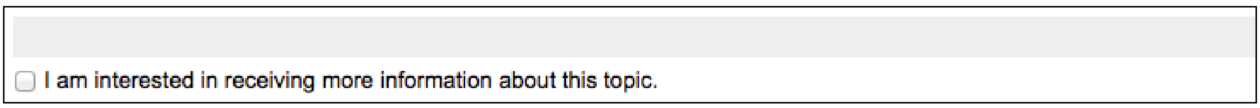
Survey Question Data Types

You must choose a **Data type** for each survey question. The data type determines how users answer the question on survey questionnaires. The following data types are available for surveys:

- Checkbox
- Choice
- Date
- Date/Time
- Likert Scale
- Number
- Percentage
- String
- Template
- Yes/No

Checkbox Data Type

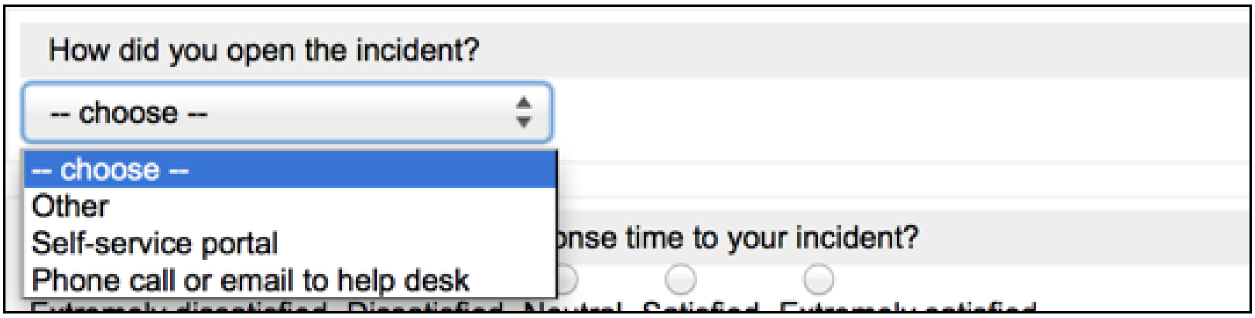
On questionnaires, users select a check box beside a statement or leave it cleared.



If you select **Checkbox**, you must configure the **Scale definition** field. Select **High** if it is best when a user selects the check box. [Does not apply to legacy systems.]

Choice Data Type

On questionnaires, users select a value from a list of choices.



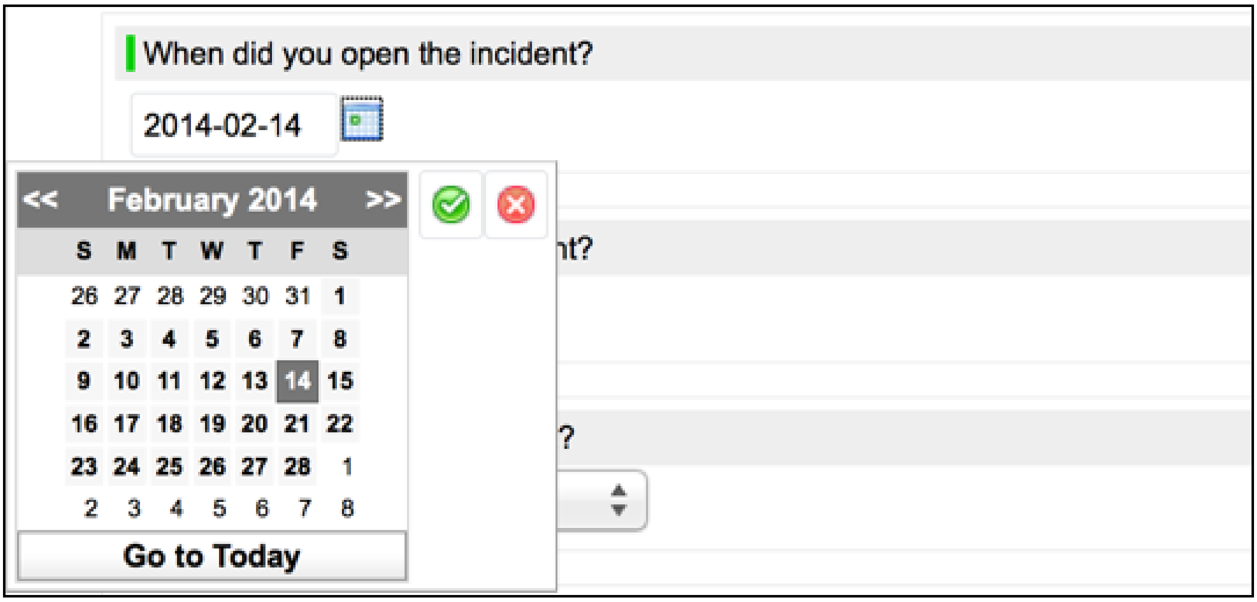
If you select **Choice**, you must fill in the **Scale definition** field and create answer options. Select **High** for the scale definition if the answer option with the largest metric definition **Value** is best. [Does not apply to legacy systems.]

> **Note:** *The system sets the **Min** and **Max** fields automatically based on the **Value** settings for the associated metric definitions.*

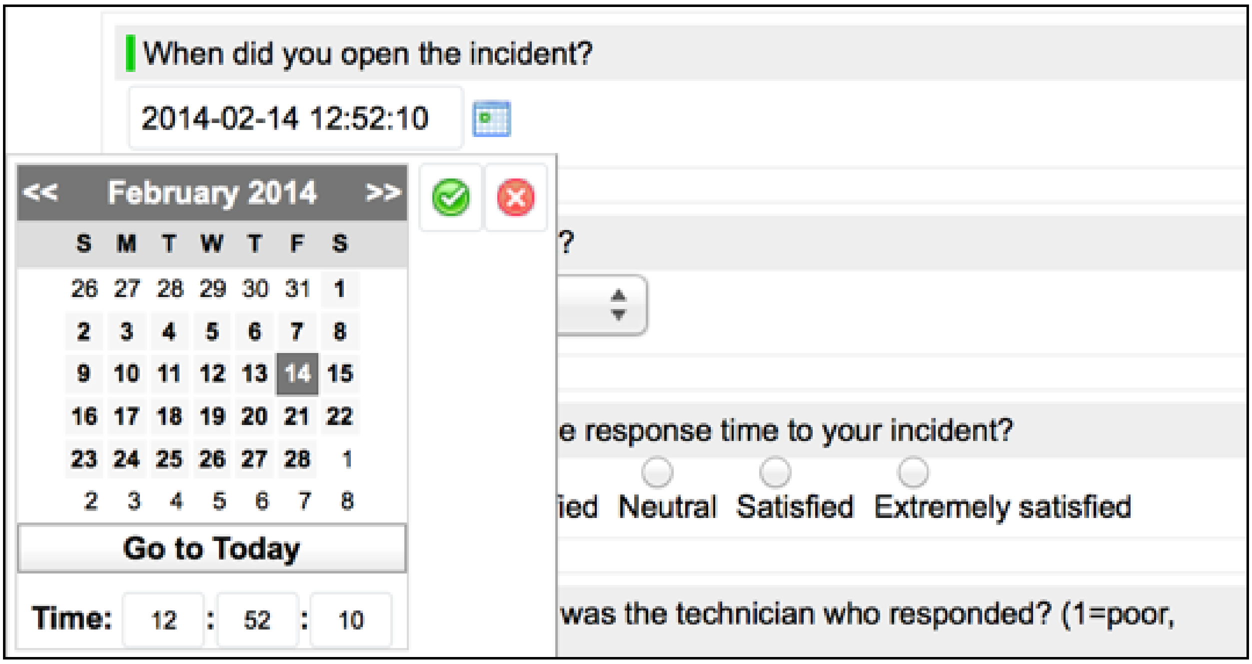
Date and Date/Time Data Types

The **Date** and **Date/Time** data types are very similar.

- **Date:** On questionnaires, users select a date.

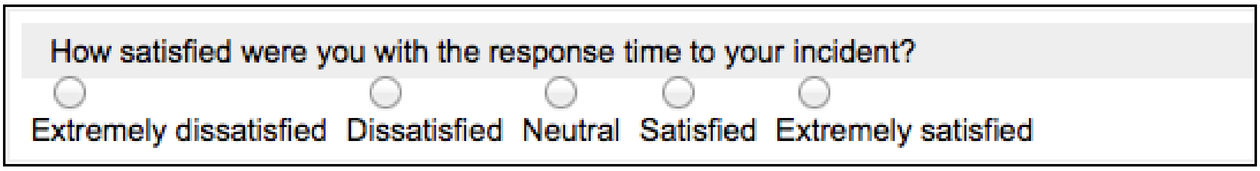


- **Date/Time:** On questionnaires, users select a date and time.



Likert Scale Data Type

On questionnaires, users select a multiple choice value from a custom Likert scale [1]. Each answer option is represented by a radio button on the scale. A Likert scale question that evaluates an application's ease of use might have the answer options **Easy**, **Average**, and **Difficult**.

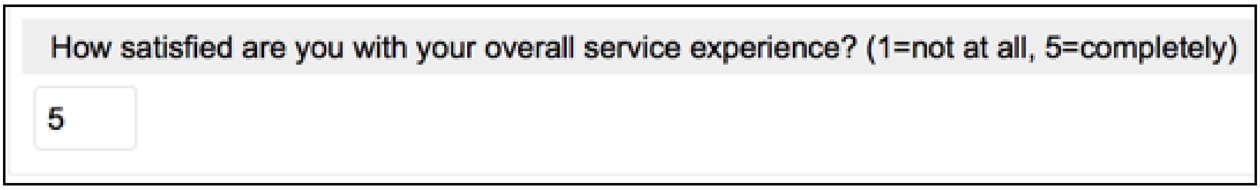


If you select **Likert Scale**, you must fill in the **Scale definition** field and create answer options. Select **High** for the scale definition if the answer option with the largest metric definition **Value** is best.

Note: *The system sets the **Min** and **Max** fields automatically based on the **Value** settings for the associated metric definitions.*

Number Data Type

On questionnaires, users enter a number.

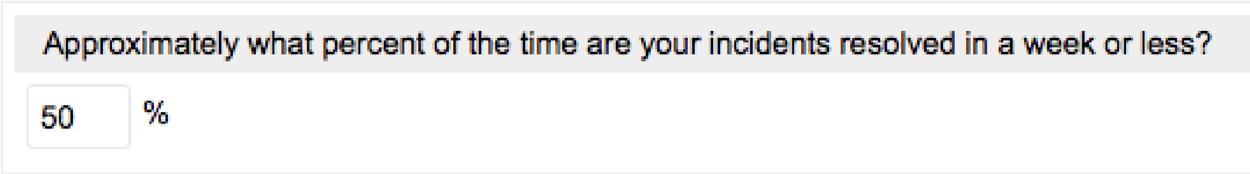


If you select **Number**, you must fill in these additional fields:

- **Scale definition:** Select **High** if a larger number is better, such as for a question that measures the number of sales made in a quarter.
- **Min** and **Max:** Enter the smallest and largest numbers users can enter. It is usually best to state the range of acceptable answers in the question text.

Percentage Data Type

On questionnaires, users enter a number.



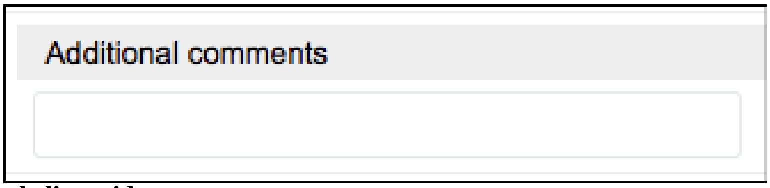
If you select **Percentage**, you must fill in these additional fields:

- **Scale definition:** Select **High** if a larger percentage is better, such as for a question that measures the percentage of work an agent has completed.
- **Min** and **Max:** Enter the smallest and larger numbers users can enter. Generally **0** and **100** are appropriate minimum and maximum values. If you choose values other than **0** and **100**, it is usually best to state the range of acceptable answers in the question text.

String Data Type

On questionnaires, users enter text. When you select **String**, the **String option** field appears. Select one of the following options to determine how the string field appears on questionnaires:

- **Single line**



- **Single line wide**

- **Multiline**

Template Data Type

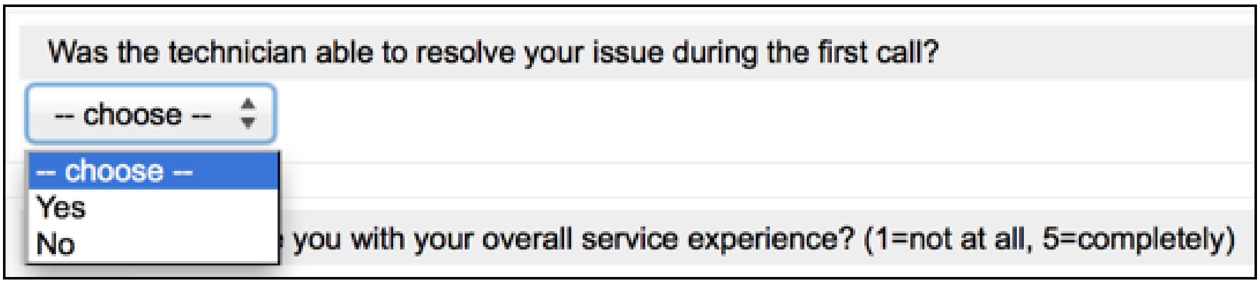
On questionnaires, users select a value from a predefined series of answer options. To use this data type, a template must be defined.

If you select **Template**, you must fill in these additional fields:

- **Template**
- **Scale definition:** Select **High** if the answer option with the largest template definition **Value** is best.

Yes/No Data Type

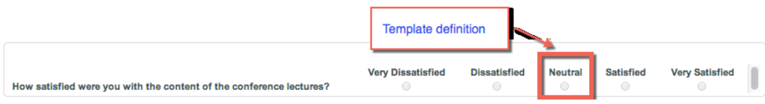
On questionnaires, users select **Yes** or **No** from a list.



If you select **Yes/No**, you must fill in the **Scale definition** field. Select **High** if **Yes** is the best answer.

Question Templates

Question templates define reusable rating scales for answering questions, where each answer option on the scale is a *template definition*. For example, the template named Satisfaction represents a satisfaction scale and contains the following template definitions: Very Satisfied, Satisfied, Neutral, Dissatisfied, and Very Dissatisfied.



A question that uses the Satisfaction template, which has five template definitions. The text above each answer option is the **Display** value of the template definition.

Templates are available for survey questions that have **Data type** set to **Template**. The following templates are available by default.

Name	Template Definitions
Amount	None, Few or little, Average amount, Many, Quite a lot
Complexity	Very Complex, Complex, Moderate, Simple, Very Simple
Frequency	Never, Seldom, Sometimes, Most of the time, All of the time
Likert 5 [1]	Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree
Quality	Very Poor, Poor, Average, Good, Very Good
Satisfaction	Very Dissatisfied, Dissatisfied, Neutral, Satisfied, Very Satisfied
Size	Very Small, Small, Average, Large, Very Large

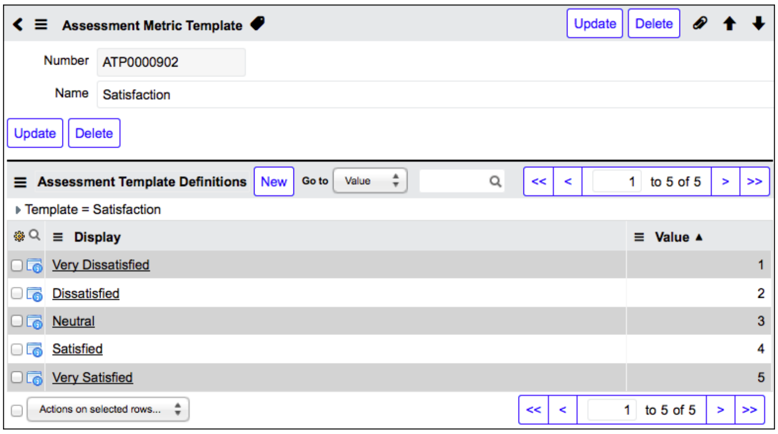
Creating Question Templates

To create a question template:

1. Navigate to **Survey Management > Templates**.

   Each template is stored as a record on the Assessment Metric Template [asmt_template] table.
2. Click **New**.
3. Fill in the **Name** field and save the record.
4. In the **Assessment Template Definitions** related list, click **New**.

   Create a template definition for each answer option you want to appear on a question.
5. Fill in the following fields:
   - **Display:** Enter the text to appear as the answer option.
   - **Value:** Enter a numeric value, greater than or equal to zero, that you want the answer option to equate to. Values are used in results calculations. When you view questions that use templates, answer options appear in order from smallest to largest **Value**. Each template definition for a given template must have a unique **Value**.
6. Click **Update**.



A completed question template with template definitions

Note: *Any templates you create are available for use with both surveys and assessments.*

Updating Question Minimum and Maximum Values to Match Templates

If you use survey result calculation data, ensure the **Min** and **Max** values of a question that uses a template are equal to the smallest and largest template definition **Value**. The system sets the **Min** and **Max** fields automatically when you create a question of the **Template** data type, based on the template definition values. However, the system does not update these fields for existing questions if you add a new template definition to a template or if you update the **Value** of an existing template definition. If the new **Value** is less than the minimum value or greater than the maximum value of any questions that use the template, update the questions accordingly.

To edit the minimum and maximum values for a question that has the **Template** data type:

1. Navigate to **Survey Management > Questions**.
2. Configure the list to show the **Min** and **Max** columns.
3. Add the following list filter condition: **[Template] [is] [<select the template you updated>]**
4. Ensure the **Min** and **Max** values match the smallest and largest template definition **Value** for the selected template.

If the values do not match, edit the **Min** and **Max** directly from the list.

Note: When the data type is **Template**, a UI policy prevents the editing of **Min** and **Max** from the form.

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/administer/survey-administration/concept/c_SurveyCategory.html

Survey Users and Groups

Overview

Survey administrators can restrict a survey so only a list of specific *survey users* can access it unless a survey administrator manually assigns the survey to a different user. *Survey user groups* provide a way to quickly designate multiple survey users from the survey creator.

Creating Survey User Groups

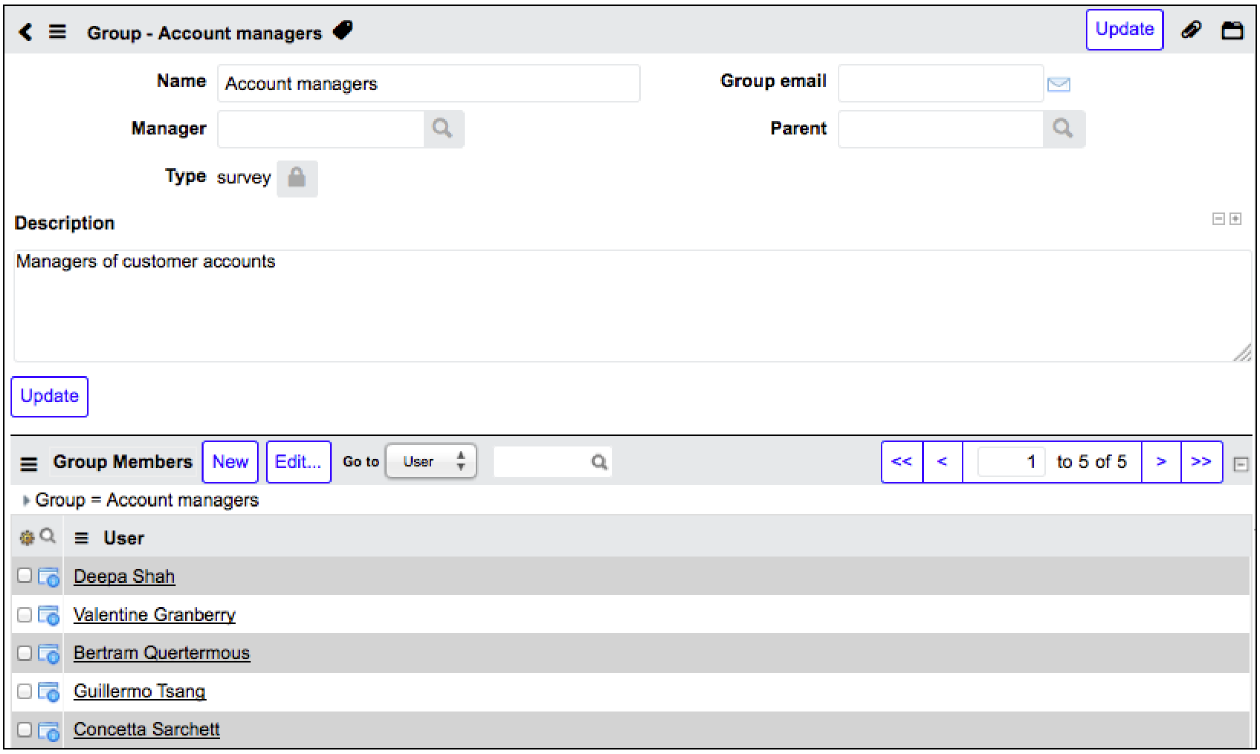
If you plan to send many different surveys to the same users, you can save time by defining those users as members of a survey user group. When you use the survey creator, you can select survey user groups or any other groups whose members you want to assign surveys. The system creates a survey user for each member of the group. You can use survey user groups only on the survey creator, so consider creating survey user groups before you create surveys.

Though it is possible to designate members of any group as survey users, you might want to create a survey group for the added convenience of viewing it in the survey **User Groups** module. Survey user groups are simply groups that have the **Type** field set to **survey** and that display only the information most relevant to surveys.

Note: *To create a survey user group, log in as a user with the admin role. Alternatively, activate the Skills Management plugin and log in as a user with the survey_admin and user_admin roles*

1. Navigate to **Survey Management > Administration > User Groups**.
2. Click **New**.
3. Fill in the fields on the Group form and add members, as appropriate (see Creating Groups).

   If you add or remove group members later, there is no impact on existing survey users. The next time you create a survey and assign it based on the group, the survey users will reflect the updated list of members.



Administering Survey Users

The list of survey users for a survey is visible on the Survey Definition and Survey Category forms. You can add or remove users from the list of survey users at any point. Note that designating a survey user does *not* automatically generate a survey instance for that user unless both of the following conditions are true:

- The survey definition **Schedule period** is set to **Daily**, **Weekly**, **Monthly**, or **Yearly**. In this case the system automatically assigns a new survey instance to each survey user at the beginning of each schedule period.
- The user has no instances of the survey that are incomplete or that have not yet reached their expiration date.

You can designate survey users from the survey creator, the Survey Definition form, or the Survey Category form.

Note: *If there are trigger conditions for a survey, do not create survey users. If you want to assign a triggered survey to a user, do it manually.*

Survey Creator

You can designate multiple survey users when you use the survey creator. In the Survey User Access section, select the **Selected users can take this survey** option, then use the slushbucket to add users. Alternatively, select the **Members of the selected groups can take this survey** option, then use the slushbucket to add survey user groups or other groups. The system saves the users or members of the groups as survey users when you save or publish the survey.

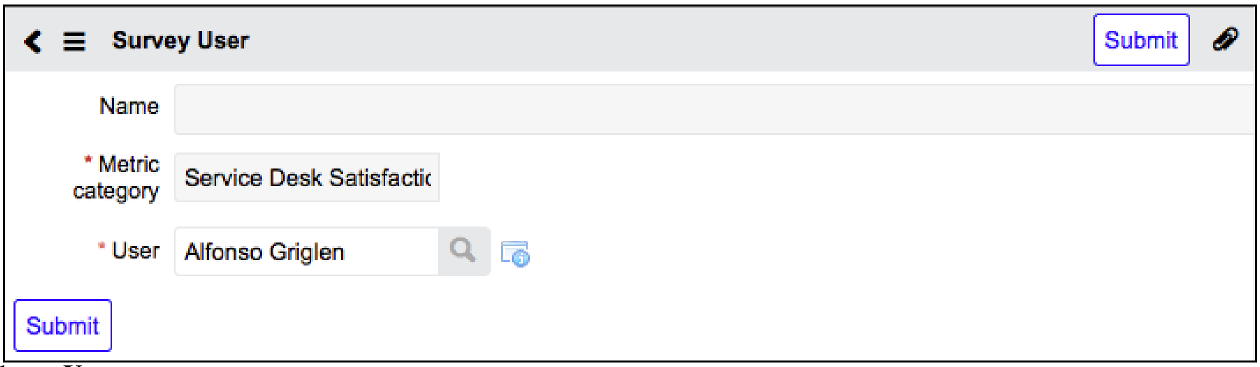
Survey Definition Form

You can designate one survey user at a time from the Survey Definition form.

1. Navigate to **Survey Management > View Surveys**.
2. Open a survey definition.

   There must be at least one category.

3. In the **Survey Users** related list, click **New** to open the Survey User form.



4. Select a **User**.
5. Click **Submit** to return to the survey definition.

To remove survey users, in the **Survey Users** related list, use the action check boxes and choice list.

Survey Category Form

You can designate or remove multiple survey users at a time from the Survey Category form.

1. Open a survey definition.
2. In the **Metric Categories** related list, open a category.

   You can choose any category. The system applies survey user changes to all the survey's categories automatically.
3. In the **Users** related list, click **Edit**.
4. Use the slushbucket to add or remove survey users.
5. Click **Save** to return to the survey category.

   The changes are also reflected in the **Survey Users** related list on the survey definition.

Trigger Conditions

Note: *This article applies to Fuji and earlier releases. For more current information, see Survey Trigger Conditions* [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

A trigger condition tells the system who to send a designated survey to and when, based on specific conditions. With trigger conditions, survey administrators can configure the system to generate a survey instance each time a specific action occurs on a given table, such as when an incident or change request closes. The system sends the selected survey to specified users related to the triggering record, such as incident callers or change request assignees. You can choose to send a survey every time the condition is met, or set a probability for the system to send a survey at random when the condition is met.

Trigger conditions are ideal for sending transactional surveys. Transactional surveys generally measure satisfaction with a recent experience, such as closing an incident or purchasing an item. For an example, see Create a Triggered Survey.

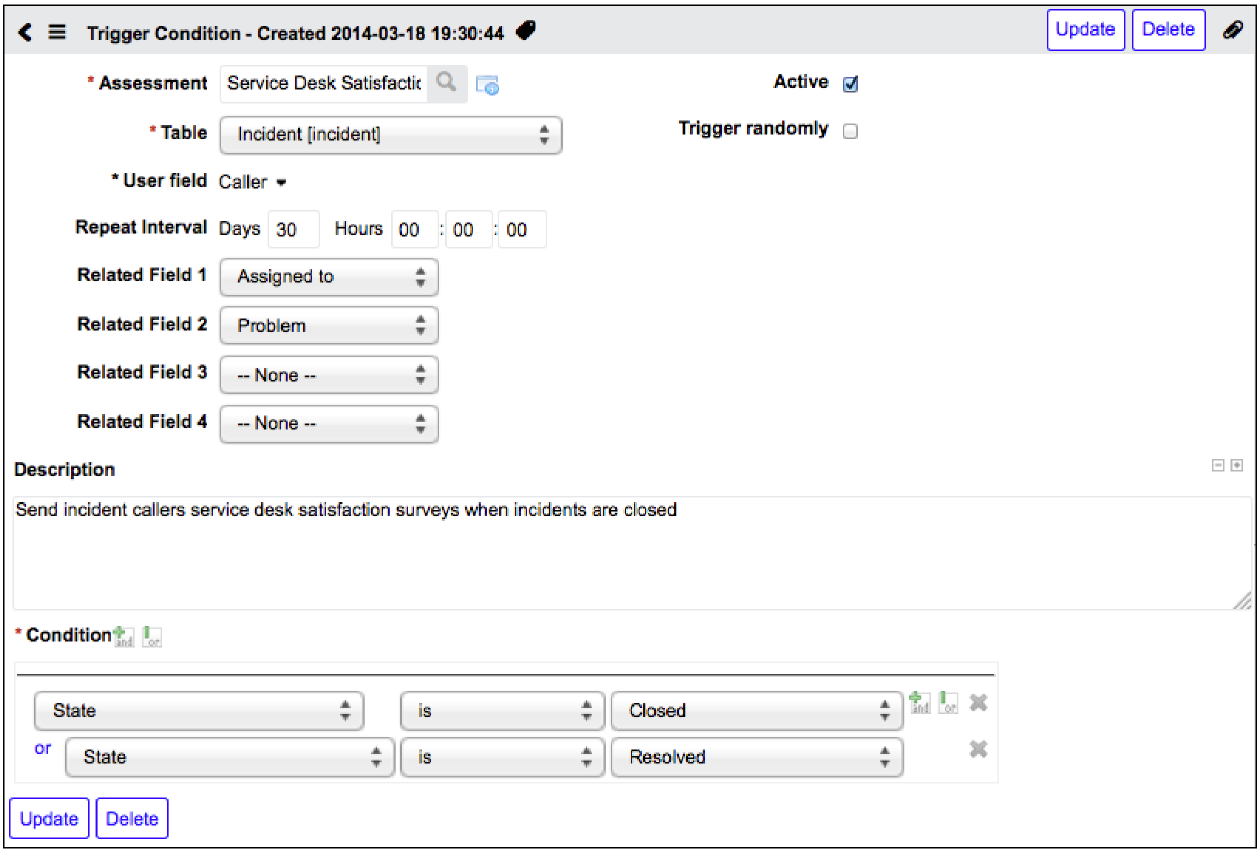
Note: *Trigger conditions are comparable to survey conditions in legacy surveys. If you migrate a legacy survey that has survey conditions, ensure they are deactivated before you recreate them as trigger conditions.*

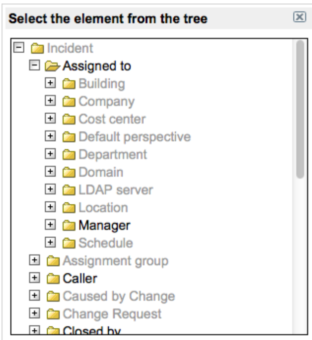
Creating Trigger Conditions

You can create a trigger condition directly from the survey creator. If you select **Certain users can take this survey, based on conditions** in the Survey User Access section, the Trigger Condition form opens automatically when you click **Save as Draft** or **Publish**.

You can also create a trigger condition by navigating to **Survey Management > Trigger Conditions** and clicking **New**. Complete the form, as appropriate (see table).

Note: *If you create a trigger condition for a survey, it is best not to create survey users for that survey, as only those users can take the survey.*



Field	Description
Assessment	[Required] Survey to send.
Table	[Required] Table on which to run the trigger condition. For example, if you want to send a survey whenever an incident closes, select the Incident [incident] table.
User field	[Required] Field that stores the users you want to send the survey. You can select any field, on the selected **Table** or on a referenced table, that references the User [sys_user] table. Use the tree picker to select a field. 
Repeat Interval	Minimum period that must pass before the trigger condition can resend the survey to the same user. For example, assume the repeat interval is set to 30 days. Even if the same user qualifies for multiple surveys from this trigger condition, the system can send her only one survey every 30 days. **Note:** Ensure that the **Schedule period** of the selected survey definition is set to **No Limit**. If the schedule period is set to a different value, it may prevent the trigger condition from sending surveys as expected.
Active	Check box that determines whether this trigger condition is active (selected).
Business rule	[Admin only] Business rule the system automatically creates to monitor the selected table. When the condition is met, the business rule sends the survey to the correct user. No configuration is necessary for this business rule.
Trigger randomly	Check box that determines whether to send the survey to the appropriate user every time the condition is met (cleared) or only a percentage of the time (selected).

Probability (%)	Probability out of 100 that the survey will be sent each time the condition is met. For example, if the probability is set to 50, the system sends the survey approximately 50% of the time the conditions are met, assuming there are no repeat interval restrictions. This field is visible and required only when **Trigger randomly** is selected.
Related Field 1 – Related Field 4	Field that contains a value you want to store for reporting purposes. You can pick any reference field on the selected **Table**. When the trigger condition generates a survey instance, the system stores the value from the triggering record. Select up to four fields. For example, if you select the Incident table, you might select **Assigned to** and **Problem** as related fields. The system stores the assigned user and problem associated with the incident as **Related record 1** and **Related record 2** in the survey instance record. To view these fields, configure the form for any survey instance. **Note:** *You cannot use a related field for the ticket number because you cannot select the Number column. You can, however, use the trigger_id column of the table.*
Description	Summary information to identify the trigger condition.
Condition	[Required] Condition builder that defines the criteria that must be true to send the survey. For example, if you want to send a survey whenever an incident closes, create the condition **[State] [is] [Closed]**.

Example

A trigger condition is configured as follows:

- **Assessment:** *Service Desk Satisfaction Survey*
- **Table:** *Incident [incident]*
- **User field:** *Caller*
- **Repeat Interval:** *30 days*
- **Active:** *true*
- **Trigger randomly:** *false*
- **Related Field 1:** *Assigned to*
- **Related Field 2:** *Problem*
- **Condition:** *[State] [is] [Closed] [or] [State] [is] [Resolved]*

Fannie Steese is the caller on an incident that is assigned to Boris Catino, a service desk technician. Boris creates PRB010101 based on Fannie's complaint and closes the incident. The system creates a survey instance assigned to Fannie so she can rate her satisfaction with the incident experience.

Because two related fields were selected as part of the trigger condition, the survey instance stores the following information from the incident:

- **Related record 1:** *User: Boris Catino*
- **Related record 2:** *Problem: PRB010101*

Note that even though the trigger condition is set to be triggered every time the conditions are met, the **Repeat Interval** setting ensures that Fannie does not receive another survey if another incident she reports closes within 30 days of the first one.

References

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

Sharing Surveys

Overview

There are several ways to make surveys available to users: send users survey invitations, share a survey URL that opens the survey directly, or create a module that opens a survey.

Sending Survey Invitations to Users

Survey administrators and survey readers can send survey invitations using the **Assign Survey** and **Send Invitations** buttons on the Survey Definition form. The buttons have slightly different uses, but both of them generate survey instances assigned to the appropriate users. The system generates survey notifications as well if the instance is configured to send email. For either button to be available, the survey definition must meet all the following conditions:

- **Active** check box is selected.
- **State** is **Published**.
- Associated with at least one question.

Note: *The system does not generate new survey instances for users who are already assigned an instance of the same survey that is incomplete or that has an upcoming expiration date.*

Assigning a Survey to Survey Users

Use the **Send Invitations** button to assign survey instances to all of a survey definition's survey users at once.

1. Navigate to **Survey Management > View Surveys**.
2. Open a survey definition that is associated with at least one survey user.
3. Click **Send Invitations**.

   The system creates survey instances assigned to each survey user who is eligible to receive a new survey instance.

Assigning a Survey to Any User

Use the **Assign Survey** button to assign a survey instance to any one user at a time.

1. Navigate to **Survey Management > View Surveys**.
2. Open a survey definition.
3. Click **Assign Survey**.
4. In the dialog box, select a user and click **OK**.

   The system creates a survey instance assigned to the user, assuming the user is eligible to receive a new survey instance. Note that when you use the **Assign Survey** button, the selected user is *not* saved as a survey user.

Sharing Survey URLs

Another way to distribute a survey is to provide users with a survey URL. Survey administrators can obtain:

- A general URL for a survey, which users can open to take the survey questionnaire.

  When someone opens the URL, first the system ensures the person is logged in. Then the system searches for an instance of the associated survey that is assigned to the logged-in user.

  If a survey instance meets these criteria, the appropriate action occurs based on the **State** of the survey instance (see table). If there are multiple active survey instances (**Ready** or **In progress**), the instance with the earliest due date opens.

  If no survey instance meets the criteria, the system creates a new instance for the survey, assigns it to the user, and opens the survey questionnaire.

- A URL for a specific survey instance, which the assigned user can open to take the survey questionnaire.

  When someone opens the URL, the system ensures the person is logged in as the user the survey instance is assigned to. Only the assigned user can access the survey questionnaire. The appropriate action occurs, depending on the **State** of the survey instance (see table).

Survey Instance State	Action Upon Opening URL
Ready: User has not saved any responses.	The survey questionnaire appears for the user to begin. The user can save or submit responses.
In progress: User has saved at least one response.	The survey questionnaire appears for the user to continue. Any previously saved responses are displayed. The user can save or submit responses.
Complete: User has submitted all required responses.	If the schedule period is **No Limit** or if the period restriction has expired, the survey questionnaire for a new survey instance appears for the user to begin. If the schedule period restricts the number of times a user can take the same survey, and the period restriction has not expired since the user last completed survey, an error message appears.

If someone opens a URL for a survey that is deactivated or that has not been published, an error message appears.

Obtaining and Distributing a General Survey URL

The general URL is available on the Survey Definition form and on the survey creator.

1. Navigate to **Survey Management > View Surveys**.
2. Open a survey definition from the Assessment Metric Types list.
3. Under **Related Links**, click **View Survey URL**.

   This related link is visible only if the survey definition is **Active**.
4. In the dialog box that appears, select and copy the URL.
5. Click **OK** or **Cancel** to close the dialog box.
6. Distribute the URL to users as needed.

Note: *When a survey user clicks the general survey URL that you provide, the system creates a survey instance for the survey user (if the user does not have an instance in the Ready to take state).*

The system is configured by default to send an email notification when a survey instance is generated for a user. As a result, the survey user receives a second notification in addition to the notification that you sent with the general survey URL. This might confuse the user. To avoid this issue, you can deactivate auto-notification.

To deactivate auto-notification:

1. Navigate to **System Notification > Email > Notifications**.
2. In the list of **Notifications**, click the **Survey User Invite** notification.

3. Customize the form to add the **Send to event creator** check box.
4. The **Send to event creator** check box is selected by default. Clear the check box to cause the system to not send the auto-notification messages to survey users.

Obtaining a Survey Instance URL

The survey instance URL is available on the survey instance record.

1. Navigate to **Survey Management > Survey Instances**.
2. Open the instance for the survey.
3. Under **Related Links**, click **View Instance URL**.

   The related link is available only when the **State** is **Ready to take** or **In progress** and the associated survey definition is **Active**.
4. In the dialog box that appears, select and copy the URL.
5. Click **OK** or **Cancel** to close the dialog box.
6. Distribute the URL to the assigned user as needed.

Creating a Survey Module

Users with the admin role can create a module that opens a survey. When a user clicks the module, the system creates a new survey instance, opens an existing one, or displays an error message, depending on configuration options for the survey and other factors.

1. Right-click the application menu you want to add the module to.
2. Select **Edit Application Menu**.
3. In the **Modules** related list, click **New**.
4. Fill in the following fields:
   - **Link type:** *Assessment*

     Do not select **Survey**, which is used for legacy surveys only.
   - **Assessment:** Select the survey you want the module to open.
5. Fill in the other fields, as appropriate (see Creating Modules).

Viewing Survey Instances

A survey instance represents one questionnaire assigned to one user. Survey administrators may want to validate the creation of survey instances, check the state of a survey instance, or reassign a survey instance.

Navigate to **Survey Management > Survey Instances** and open a survey instance. Each survey instance is stored as a record on the Assessment Instance [asmt_assessment_instance] table with a modified view for survey use.

Field	Description
Number	[Read-Only] Automatically generated record number.
Metric type	[Read-Only] Survey definition this survey instance was created from. Survey definitions are stored on the Assessment Metric Type table, which is why the field is called **Metric type**.
Due date	[Read-Only] Date by which the survey instance should be completed. The system automatically populates the due date based on the **Assessment duration** of the associated survey definition, which is set to 14 days by default. For example, a survey instance generated March 2nd, 2013 would be due March 16th, 2013 by default. **Note:** The survey due date is not enforced in the base system. If you want to enforce the due date, consider using a workflow or other mechanism to send survey recipients reminders when a survey is overdue.
State	[Read-Only] State of the survey instance. The possible states are **Ready to take**, **In progress**, **Complete**, and **Canceled**.
Assigned to	User to whom this survey instance is assigned. This field becomes read-only when the state is **In progress**, **Complete**, or **Canceled**.
Expiration date	[Read-Only] Date on which the assigned user can receive a new instance of the same survey definition. The system automatically populates the expiration date based on the **Schedule period** of the associated survey definition. For more information, see Schedule Periods.
Related List	
Assessment Instance Questions	All instance question records, which store user response values for each question on the survey questionnaire. The following columns are relevant to surveys: • **Category:** Displays the survey categories to which the questions belong. • **Metric:** Displays the survey questions.

Exporting and Importing Surveys

Export a survey to quickly and easily import it to a different instance of ServiceNow. The system exports a single XML file that contains a survey definition [asmt_metric_type] and the following records with which it is associated:

- Survey categories [asmt_metric_category]
- Survey questions [asmt_metric]
- Metric definitions [asmt_metric_definition] (survey question answer options)
- Survey users [asmt_m2m_category_user]

Exporting a Survey

Survey administrators, assessment administrators, and survey readers can export a survey.

1. Navigate to **Survey Management > View Surveys**.
2. Right-click the name of a record to show the context menu.
3. Select **Export Assessment**.
4. If applicable, follow the prompt in your browser to save the XML file.

Importing a Survey

Administrators can import a survey. To do so, first ensure that the target instance has assessments enabled. Then follow the procedure detailed in Import Records as XML Data. Note that the exported XML file does not contain result data.

Properties

Overview

Assessment administrators and survey administrators can use properties to customize the appearance of assessment and survey questionnaires. Customizations you save apply to all assessments and surveys.

Assessment and survey properties are available starting with the Eureka release.

Customizing Appearance

Use properties to customize the color of various elements on the questionnaires.

Note: *For color properties, enter either an HTML color name* [1] *or hexidecimal (hex) value* [2]*. For hex values, the* **#** *character is required. Values are not case-sensitive. For example, all of the following formats are valid: LightGray, lightgray, #D3D3D3. A preview of the color appears beside the field.*

1. Navigate to either of the following modules:
   - **Assessments > Admin > Assessment Properties**
   - **Survey Management > Administration > Properties**
2. On the properties page, edit the properties as needed (see table).
3. Click **Save**.

   Note: You may need to clear the browser's cache to see updates.

Property	Label	Description
css.assessment.question.header.background.color	Assessment question header background color	Sets the background color of question headers on assessment and survey questionnaires. • **Default value:** #767676
css.assessment.caption.background.color	Assessment caption background color	Sets the background color of the caption on assessment and survey questionnaires. • **Default value:** #eee
css.assessment.caption.font.color	Assessment caption font color	Sets the font color of the caption text on assessment and survey questionnaires. • **Default value:** #ffffff

References

[1] http://www.w3.org/TR/css3-color/#svg-color
[2] http://www.w3schools.com/tags/ref_colorpicker.asp

Viewing Responses

Note: *This article applies to Fuji and earlier releases. For more current information, see Survey Responses and Results* [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

Survey responses are stored on the Metric Result [asmt_metric_result] table. There is a metric result record for each user's response to each question on every survey instance.

Viewing Survey Responses

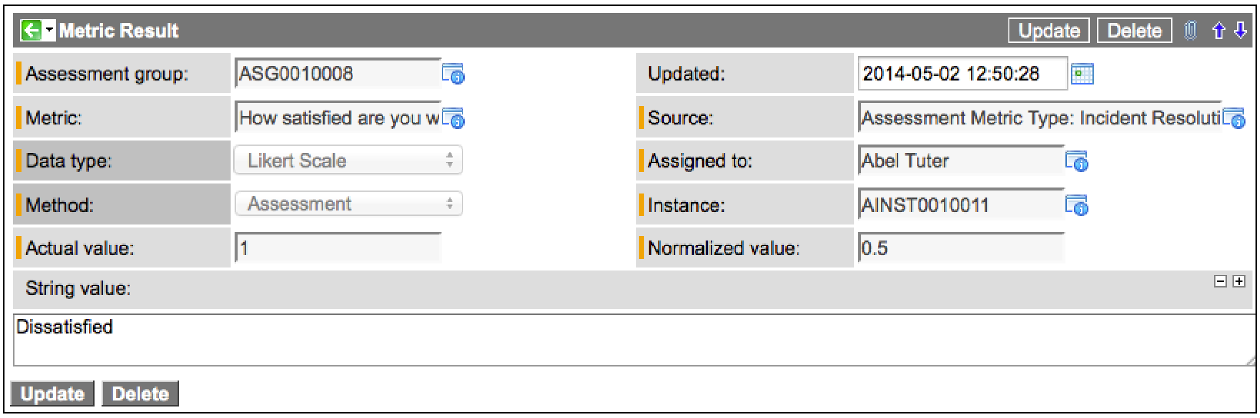
Survey readers and survey administrators can view results for all surveys or for one specific survey.

- To view results for all surveys, navigate to **Survey Management > Survey Responses**. Do not confuse this module with **Survey Management > Legacy Surveys > Survey Responses**, which displays legacy survey responses.

  The **Type** column displays the survey definition each response is associated with. Recall that survey definitions are stored on the Assessment Metric Type table, which is what the name **Type** refers to.
- To view results for a specific survey, navigate to **Survey Management > View Surveys** and open a survey definition. Under **Related Links**, click **View Responses**, which is available only if there are results.

  The results are grouped by metric, which is what questions are called in assessments.

Open a metric result to view more detail. The metric result contains the user's response as well as calculated values, which advanced survey administrators may be interested in. Because the Metric Result table is also used by the assessment feature, many field names are not clear in the context of surveys.



Field	Description
Assessment group	*Assessment group* to which the metric result belongs. An assessment group is a container for survey instances and results generated in a single occurrence. The system generates an assessment group every time at least one survey instance is created. If multiple survey instances are created at once, such as when a survey administrator sends invitations to a list of survey users, they are all stored in the same assessment group.
Metric	Question the user answered.
Data type	Data type of the question the user answered.
Method	Always **Assessment** for surveys. For more information about how methods are used in the assessment feature, see Methods.
Updated	Date and time the metric result was last updated.
Source	Survey definition from which the associated survey instance was generated.
Assigned to	User who completed the survey questionnaire.
Instance	Survey instance completed by the **Assigned to** user.
Actual value	Value obtained from the user response to the question. The actual value is determined by the question data type: • **Checkbox:** The actual value is **0** if the check box is cleared and **1** if it is selected. • **Choice** or **Likert Scale:** The actual value is equal to the **Value** of the metric definition associated with the chosen answer option. • **Date**, **Date/Time**, or **String:** The actual value is **-1** to indicate that these data types do not contribute to category result calculations. • **Template:** The actual value is equal to the **Value** of the template definition associated with the chosen answer option. • **Yes/No:** The actual value is **0** if the response is **No** and **1** if it is **Yes**.
Normalized value	Adjusted value that accounts for the question's **Scale definition** setting, minimum and maximum values, and other factors that impact the question.
String value	Value that displays the response as it appears on a questionnaire. In some cases this is the same as the **Actual value**, such as when the question data type is **Percentage**. The string value is **N/A** for unanswered questions of certain data types.

Viewing a Survey Scorecard

You can view graphical results for a survey in a *scorecard*. A scorecard provides a visual breakdown of survey responses. Scorecards display a variety of data summaries for one survey definition. On a survey definition, under **Related Links**, click **View Scorecard**, which is available only if there are results. For more information, see Survey Scorecards.

References

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

Survey Scorecards

Overview

The Survey Management application prepares printable *scorecards*. A scorecard displays easy-to-interpret survey results, in which category and question responses are analyzed and current ratings are compared with previous ratings. Users can examine ratings over time, compare question ratings, or compare the ratings of all categories. All ratings are averages for the time range selected. The system dynamically updates a scorecard each time you view it, so the ratings reflect recently completed surveys.

Viewing Scorecards

1. Navigate to **Survey Management > View Surveys**.
2. Open a survey definition.
3. Under **Related Links**, click **View Scorecard**.

   The scorecard link is hidden if there are no survey results to report.

The scorecard contains a header that displays the name of the survey and a section that displays results or compares the ratings. The scorecard presents results in the following views:

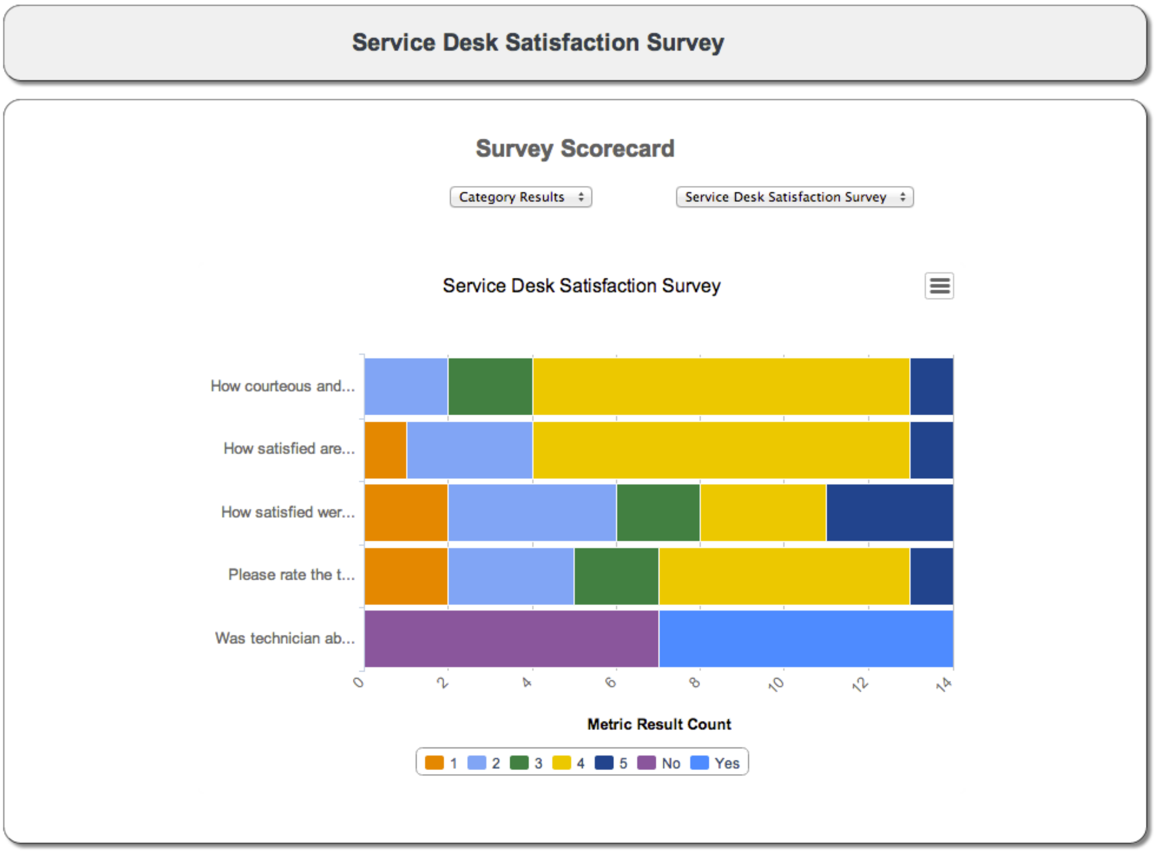
- Category Results
- Question Results
- Average Ratings
- History

Category Results

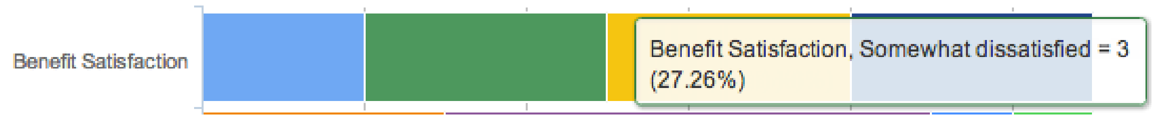
The Category Results view is a stacked bar chart showing survey results for all questions in a category by respondent count. Select a category from the list to display the questions from that category in the chart. This view displays responses that use the following data types:

- Checkbox
- Choice
- Likert Scale
- Number
- Template
- Yes/No

Note: *The **Checkbox** and **Yes/No** data types are combined into the **Boolean** data type in the Survey Designer, available starting with the Fuji release.*



To view details about a specific response, point to the colored bar to display the response, the number of responses, and the percentage it represents of all the responses to that question.



Question Results

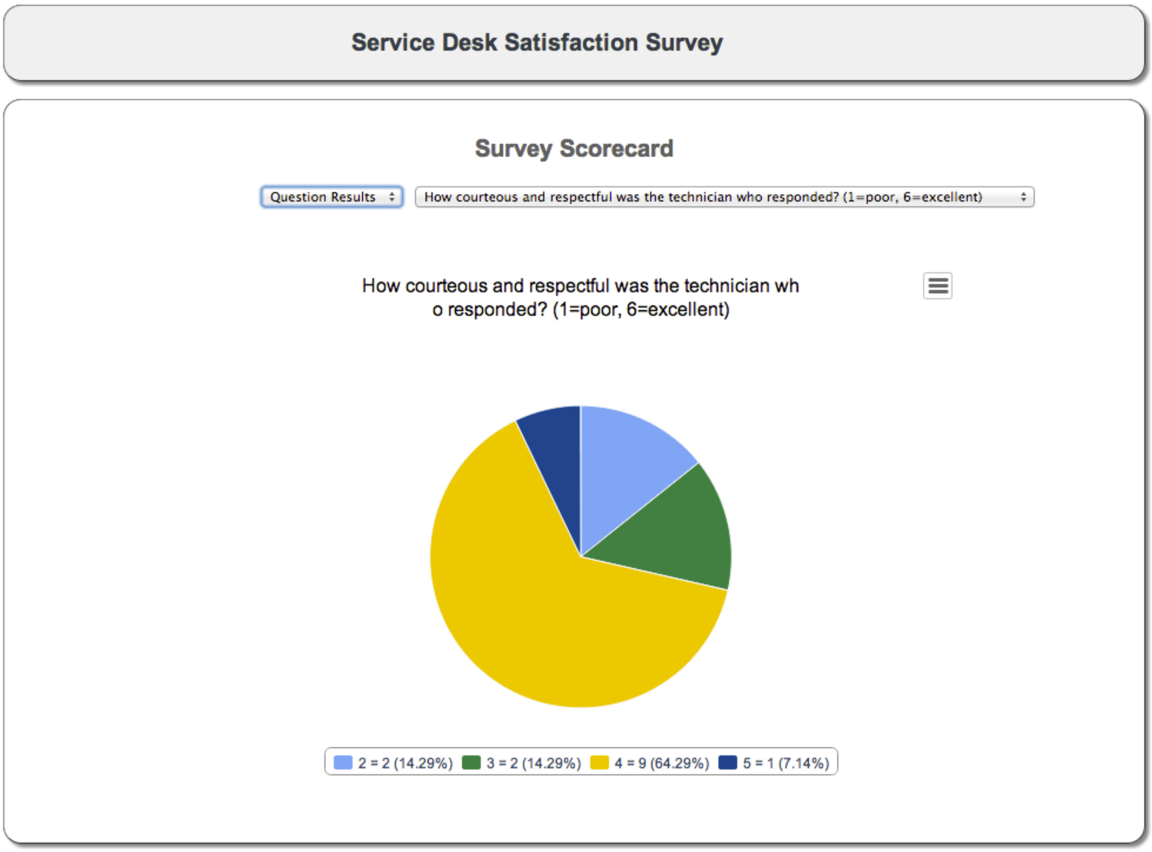
The Question Results view shows the results for each question in a category using different chart types, based on a data type.

Pie Chart

The pie chart shows question results for these data types:

- Checkbox
- Choice
- Likert Scale
- Number
- Template
- Yes/No

Note: *The **Checkbox** and **Yes/No** data types are combined into the **Boolean** data type in the Survey Designer, available starting with the Fuji release.*



Bar Chart

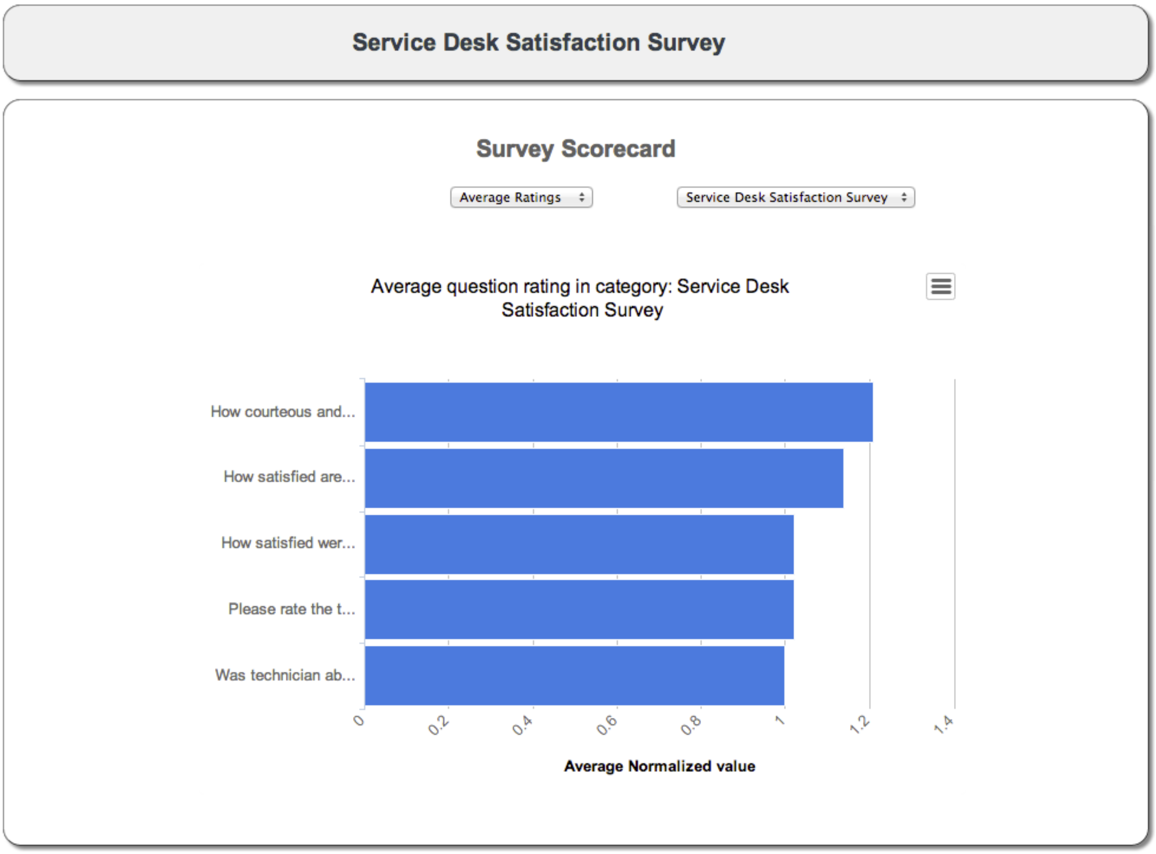
A bar chart appears when question results use this data type:

- Percentage

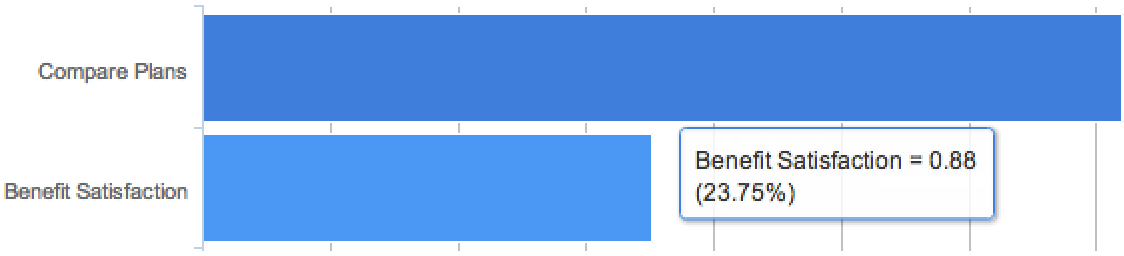
By default, all results for percentage questions use a report range of 20% segments. To configure a report range, navigate to **Reports > Administration > Report Ranges**.

Average Ratings

The Average Ratings view displays the weighted average rating for each survey question in a category. Use this view to learn how individual questions affect the overall rating for the category. Select a survey category from the choice list to display the chart for that category.



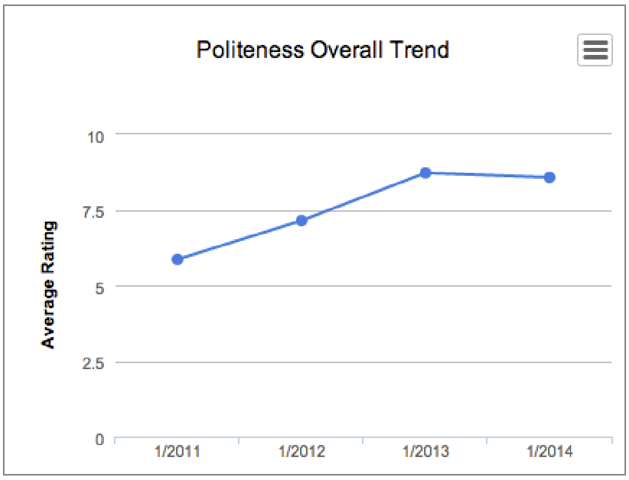
To view the effect of each question's ratings on the entire category's ratings, point to the colored bar. The pop-up box shows the percentage of the total ratings represented by each individual question's weighted average.



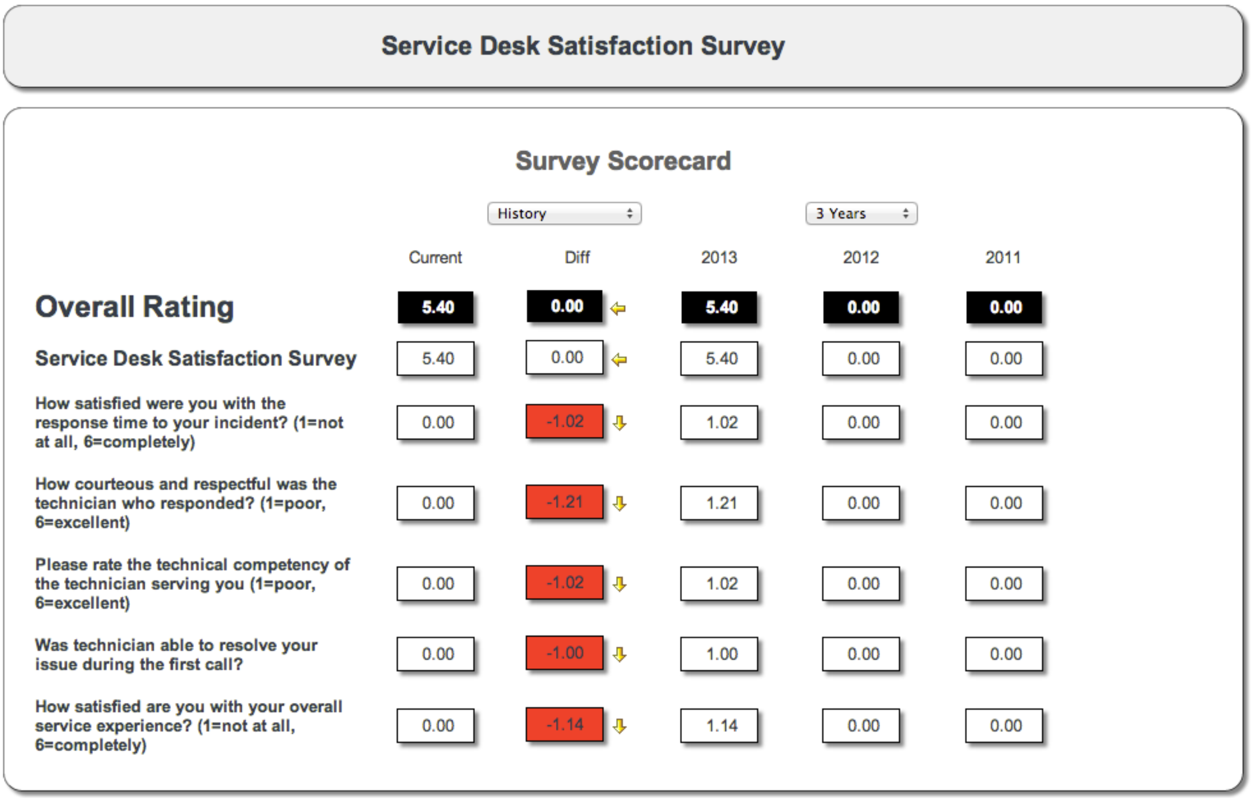
History

The History view compares the current ratings for the categories and their questions with ratings from the previous three years or four quarters. Ratings that have declined are highlighted in red and display negative numbers. Ratings that have improved are highlighted in green with positive numbers. Arrow icons beside the values in the **Diff** column indicate the trend of the current survey against the previous survey.

Point to a category to display a line chart that shows the rating trend for that category. Click a category to view the Survey Category form containing the survey questions.



- **3 Years:** To calculate the current ratings, the system averages the ratings from the trailing twelve month (TTM) period. The **Diff** column shows the discrepancy between the current ratings and the previous calendar year's ratings.



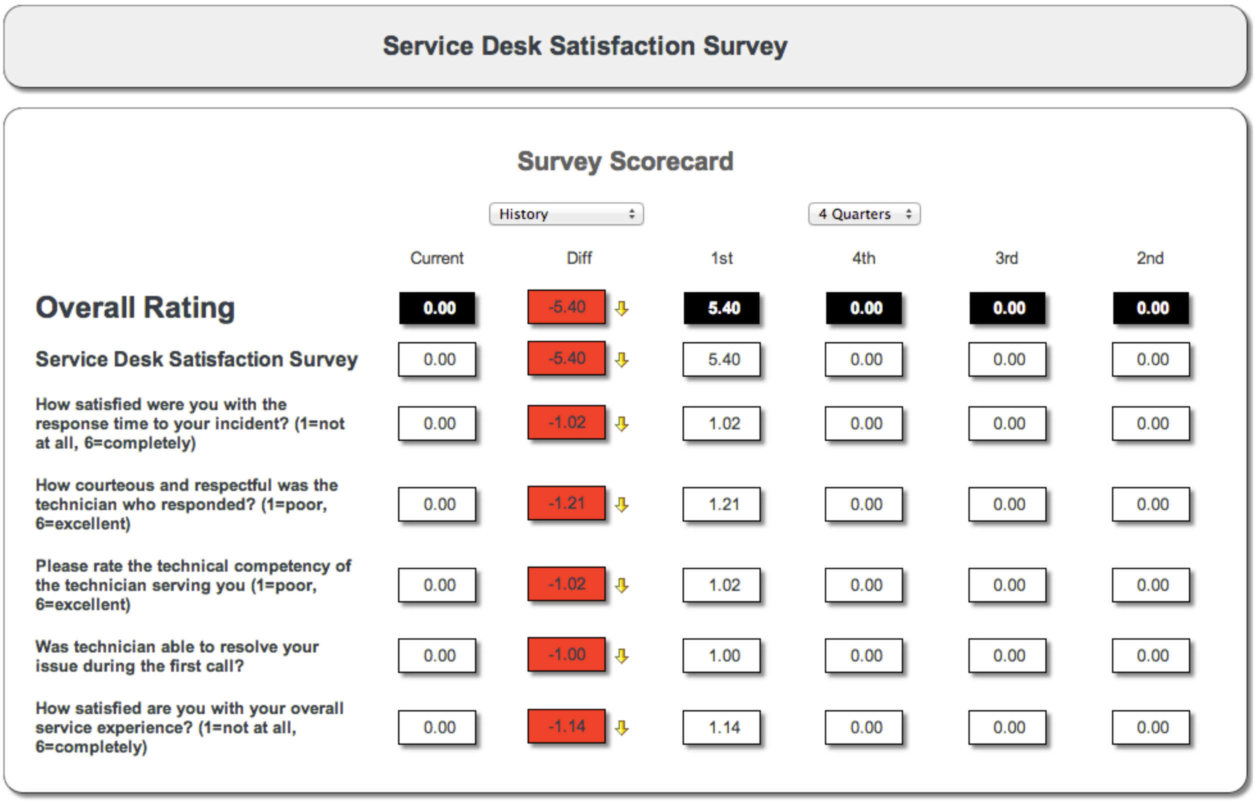
Service Desk Satisfaction Survey

Survey Scorecard

History | 3 Years

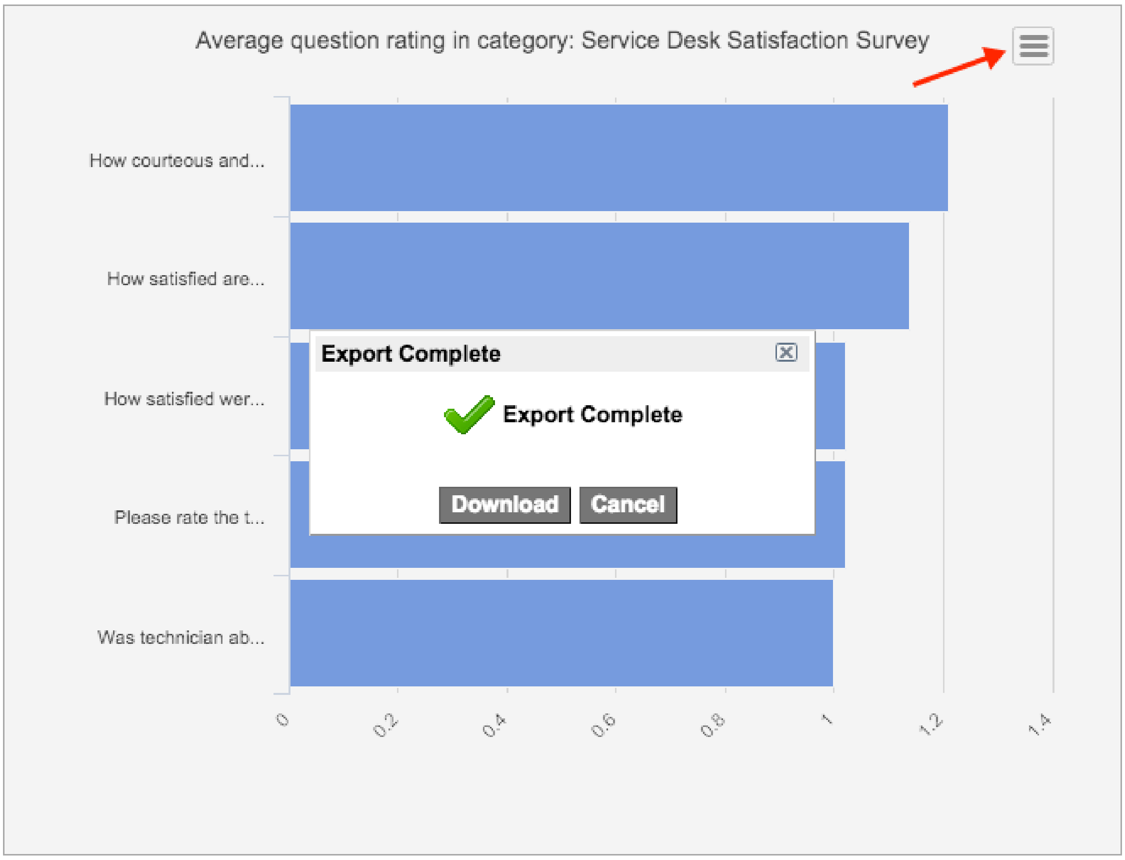
	Current	Diff	2013	2012	2011
Overall Rating	5.40	0.00	5.40	0.00	0.00
Service Desk Satisfaction Survey	5.40	0.00	5.40	0.00	0.00
How satisfied were you with the response time to your incident? (1=not at all, 6=completely)	0.00	-1.02	1.02	0.00	0.00
How courteous and respectful was the technician who responded? (1=poor, 6=excellent)	0.00	-1.21	1.21	0.00	0.00
Please rate the technical competency of the technician serving you (1=poor, 6=excellent)	0.00	-1.02	1.02	0.00	0.00
Was technician able to resolve your issue during the first call?	0.00	-1.00	1.00	0.00	0.00
How satisfied are you with your overall service experience? (1=not at all, 6=completely)	0.00	-1.14	1.14	0.00	0.00

- **4 Quarters:** Quarterly surveys compare the average rating for each question and category in the current quarter against the average ratings from the previous four quarters. The **Diff** column shows the discrepancy between the current ratings and the previous quarter's ratings. The column labels count backward, by quarter from the current quarter. For example, if the current quarter is the **3rd** quarter of 2013, then the previous quarters appear as **2nd** [2013], **1st** [2013], **4th** [2012], and **3rd** [2012]. All four of the previous quarters appear, whether or not there was any data for those quarters.



Exporting Scorecards as Images

Click the menu icon (☰) and select **Save as PNG** or **Save as JPEG** as the download format. When the export is complete, select **Download** to save the scorecard image to a storage location.



API Reference

Overview

The `SNC.AssessmentCreation` class provides methods that administrators can use to generate assessments and surveys. The API is significantly enhanced in the Eureka release. If you are using the Dublin release, see the previous version information.

Where To Use

Use these methods in scripts anywhere you can use client-side JavaScript.

Method Summary

There are many different ways to call the `createAssessments` method. See the following table for samples. You must set the `typeID` parameter in all cases to identify a metric type or survey definition.

Method Summary	Description
createAssessments(String typeID)	• **Assessments:** Creates a new assessment group and assessment instances for stakeholders, based on the assessable records they are stakeholders for. Does not work for on-demand assessments. • **Surveys:** Creates a new assessment group and survey instances for survey users. An *assessment group* is a container for survey instances generated in a single occurrence and for the responses for those survey instances. For example, there is one assessment group for all the survey instances created when you send invitations to the survey users for a given survey.
createAssessments(String typeID, String sourceRecordID, String userID)	• **Assessments:** Creates a new assessment group and assessment instances for the users specified, based on the assessable records specified. • **Surveys:** Creates a new assessment group and survey instances for the users specified.

Some of the factors that influence how the method behaves include:

- Whether the target is an assessment or survey
- Whether the assessment schedule type is on-demand or scheduled
- Survey schedule period
- Parameters provided

For example, when the method is called with only the `typeID` parameter set, the method searches for stakeholders or survey users to send invitations to. In contrast, when the method is called with the `typeID` and `userID` parameters set, it attempts to send invitations to the specified users.

Method Detail

createAssessments(String typeID)

Creates one or more assessments or surveys for the specified metric type or survey definition.

Input Fields

Parameters:

- **typeID** - (String) The sys_id of the metric type or survey definition to generate assessments or surveys for.

Output Fields

Returns: (String) If the method is successful, it returns a comma-separated string like 7a2ad2253784200044e0bfc8bcbe5de1,10,b7e8b5d4c0a80169008b49e468920048 (Incident ID, number of users, Group ID) with the following values:

- **instanceID:** Sys_id of the assessment or survey instance created, if there is only one. Sys_id of one of the instances, if there are multiple.
- **#instances:** Number of assessment or survey instances created.
- **groupID:** Sys_id of the assessment group that contains the assessment or survey instances created.

If the method is unable to generate assessments or surveys, it returns one of the error codes.

Example

```
// For a scheduled assessment, create assessment instances assigned to
each stakeholder
// For a survey, create survey instances assigned to each survey user
new SNC.AssessmentCreation().createAssessments(type.sys_id);
```

createAssessments(String typeID, String sourceRecordID, String userID)

Creates one or more assessments or surveys for the specified metric type or survey definition.

Input Fields

Parameters:

- **typeID** - (String) The sys_id of the metric type or survey definition to generate assessments or surveys for.
- **sourceRecordID** - (String) One or more comma-separated sys_ids of records to include in the assessments generated. There must be an assessable record associated with the specified metric type for each source record. If this parameter is left blank, the assessments generated include all assessable records for the specified type. This parameter is for use with assessments only.
- **userID** - (String) One or more comma-separated sys_ids of users to send assessment or survey instances to. If this parameter is left blank, the assessment stakeholders or survey users receive instances. This parameter is required for on-demand assessments.

Output Fields

Returns: (String) If the method is successful, it returns a comma-separated string like 7a2ad2253784200044e0bfc8bcbe5de1,10,b7e8b5d4c0a80169008b49e468920048 (Incident ID, number of users, Group ID) with the following values:

- **instanceID:** Sys_id of the assessment or survey instance created, if there is only one. Sys_id of one of the instances, if there are multiple. If there are multiple instances, use the group ID to retrieve data.
- **#instances:** Number of assessment or survey instances created.
- **groupID:** Sys_id of the assessment group that contains the assessment or survey instances created.

If the method is unable to generate assessments or surveys, it returns one of the error codes.

Example

```
// For an on-demand assessment, create an assessment instance with all
assessable records, assigned to one user
// For a survey, create a survey instance assigned to a specific user
new SNC.AssessmentCreation().createAssessments(type.sys_id, "",
user.sys_id);
```

Error Codes

Error code	Likely reason
isscheduled	Indicates that the `userID` or `sourceRecordID` parameter should not have been used. When the `typeID` value represents a metric type with the **Schedule type** field set to **Scheduled**, the `typeID` parameter is the only parameter that may be used.
draft_state	Indicates that the `typeID` value is a metric type or survey definition that is not published. Publish the metric type or survey definition.
invalidtype	Indicates that there is no existing metric type that matches the `typeID` value.
inactive	Indicates that the `typeID` value is a metric type or survey definition that is not active. Navigate to the metric type or survey definition and select the **Active** check box.
not_available	Indicates that the `typeID` value is a metric type or survey definition that has no metrics or survey questions. Add at least one metric or survey question.
notyet	Indicates that at least one of the users in the `userID` value is assigned a survey instance, for the specified survey definition, that is yet to expire. The error code returns the expiration date.
wip	Indicates that at least one of the users in the `userID` value is already assigned a survey instance for the survey.
not_authorized	Indicates that at least one of the users in the `userID` value is not authorized to take the survey. Verify that one of the following is true: • There are no survey users for the specified survey definition. • All the users in the `userID` value are saved as survey users for the specified survey definition.
completed	Indicates that the `typeID` value is a survey definition with the **Schedule period** field set to **Only Once** and that at least one of the users in the `userID` value has already completed a survey instance for that survey definition.
nousers	Indicates that the `userID` parameter was not used and that one of the following is true: • There are no stakeholders associated with the specified metric type. Set the `userID` parameter or create at least one stakeholder. • There are no survey users associated with the specified survey definition. Set the `userID` parameter or create at least one survey user.
nosources	Indicates that the `typeID` value is a metric type with the **Schedule type** field set to **On demand** and that neither the `userID` nor `sourceRecordID` parameter was used. Set at least one of these parameters.

Versions Prior to the Eureka Release

Click the plus to expand previous version information

Method Summary

Method Summary	Description
createOnDemandInstance(String assessableRecordID, String userID)	Creates an assessment for a single user and assessable record.
createOnDemandInstanceForSource(String type, String sourceRecordID, String userID)	Creates an assessment for a single user and assessable record, specified by the source id.
createOnDemandGroup(String assessableRecordID, String userIDs)	Creates assessments for an assessable record, for several users.

Method Detail

createOnDemandInstanceForSource(String type, String sourceRecordID, String userID)

Creates an assessment for the provided source record, assigned to the user.

Input Fields

Parameters:

- **type** - (String) The metric type ID.
- **sourceRecordID** - (String) The source Record ID. There must be an assessable record for this source within the metric type provided.
- **userID** - (String) The user.

Output Fields

Returns: (String) The assessment instance ID of the generated assessment instance, empty if the assessable record does not exist or has no assessable metrics in the categories for this assessable record.

Example

```
new
SNC.AssessmentCreation().createOnDemandInstanceForSource(type.sys_id,
instance.sys_id, user.sys_id);
```

createOnDemandInstance(String assessableRecordID, String userID)

Creates an assessment for the provided assessable record, assigned to the user.

Input Fields

Parameters:

- **assessableRecordID** - (String) The assessable record ID.
- **userID** - (String) The user ID.

Output Fields

Returns: (String) The assessment instance ID, or empty if there was an error. If the assessable record does not exist, the assessable record was not linked to categories that contained at least one assessment metric.

Example

```
new SNC.AssessmentCreation().createOnDemandInstance(asmtRec.sys_id,
user.sys_id);
```

createOnDemandGroup(String assessableRecordID, String userIDs)

Creates a group of assessments for the provided assessable record, one for each user.

Input Fields

Parameters:

- **assessableRecordID** - (String) The assessable record ID.
- **userIDs** - (String) A comma separated list of user IDs.

Output Fields

Returns: (String) The assessment group created, or empty if there were no assessments created.

Example

```
new SNC.AssessmentCreation().createOnDemandGroup(asmtRec.sys_id,
user1.sys_id + ','
+ user2.sys_id + ',' + user3.sys_id);
```

Examples

Create a Triggered Survey

Note: *This article applies to Fuji and earlier releases. For more current information, see Survey Trigger Conditions* [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

In this example, assume that your company wants to collect user feedback about your incident process. As the survey administrator, you will create a triggered survey that the system sends to incident callers when their incidents are resolved. After you create the basic survey, you will add *conditional questions* and make other modifications to the questions. You will test the *trigger condition* that sends the survey and complete the survey yourself.

The survey_admin role is required to complete this example.

Create the Survey

Use the survey creator to build the basic survey. For more information, see Using the Survey Creator.

1. Navigate to **Survey Management > Create Survey**.
2. Fill in the following fields:
   - **Name:** *Incident Resolution Survey*
   - **Description:** *Survey to collect information about user experience related to the incident process*
3. In the **Survey Questions** section, add the questions (see table).
4. [Optional] Click **Preview** to see what the survey will look like. Click **Close** when you are finished.
5. In the **Survey User Access** section, select **Certain users can take this survey, based on conditions**.
6. At the bottom of the survey creator, click **Save as Draft**.

   You will make additional changes before publishing the survey.

Question	Answer Data Type	Additional Fields
Incident number (i.e. INC000001)	String	**String option:** *Single line*
When did you open the incident?	Date/Time	None
How did you open the incident?	Choice	Enter the following answer options: 1. *Self-service portal* 2. *Phone call or email to the help desk* 3. *Other*
Was the technician able to resolve your issue in the first response?	Yes/No	None
Approximately what percent of the time are your incidents resolved in a week or less?	Percentage	**Min:** *0* **Max:** *100*

How satisfied are you with your overall service experience?	Likert Scale	Enter the following answer options: 1. *Extremely dissatisfied* 2. *Dissatisfied* 3. *Neutral* 4. *Satisfied* 5. *Extremely satisfied*
Please provide any additional feedback.	String	**String option:** *Multiline*
Contact me with future feedback opportunities.	Checkbox	None

Create the Trigger Condition

The trigger condition tells the system who to send the survey to and when, based on specific conditions. You will create a trigger condition that sends your survey to incident callers when incidents are resolved. For more information, see Survey Trigger Conditions.

The Trigger Condition form opens automatically because of the survey user access option you selected on the survey creator. Complete the form as follows.

Field	Value
Assessment	Incident Resolution Survey
Table	Incident [incident]
User field	Caller
Repeat Interval	30 days
Active	Selected
Trigger randomly	Cleared
Related Field 1 – Related Field 4	-- None --
Description	Send the Incident Resolution Survey to incident callers when incidents are closed, no more frequently than every 30 days
Condition	[State] [is] [Resolved]

Add an Introduction and End Note to the Survey

Introductions and end notes allow you to personalize surveys and provide helpful information to survey recipients.

1. Navigate to **Survey Management > View Surveys**.

   The list displays all *survey definitions*. The system created a survey definition for the survey automatically when you used the survey creator.
2. Open the **Incident Resolution Survey** survey definition.
3. Fill in the following fields and apply any HTML formatting desired:
   - **Introduction:** *Please answer the following questions about your recently closed incident.*
   - **End note:** *Thank you for providing your feedback! You have completed this survey.*
4. Right-click the form header and select **Save**.

Update the Survey Questions

Make the following adjustments to the survey questions:

- Add conditional questions.
- Update the question order.
- Make a question mandatory.

Add Conditional Questions

A conditional question is visible only when a user answers another question a certain way. You will add two conditional questions to your survey. For more information about survey questions in general, see Survey Questions.

Primary Reason Not Satisfied

The first conditional question will appear only when users indicate they had an unsatisfactory service experience. The question will gather more information about why the user was not satisfied.

1. In the **Metric Categories** related list on the Survey Definition form, click **Incident Resolution Survey**.

    The system automatically created a *survey category* for your survey questions when you used the survey creator.
2. In the **Assessment Metrics** related list on the Survey Category form, click **New**.
3. Fill in the following fields:
    - **Name:** *Primary reason not satisfied*
    - **Question:** *What is the primary reason you are not satisfied with your experience?*
    - **Data type:** *Choice*
    - **Scale definition:** *Low*
    - **Randomize answers:** Cleared
    - **Allow not applicable:** Cleared
    - **Depends on:** *How satisfied are you with your overall service experience?*
    - **Displayed when:** *Extremely dissatisfied, Dissatisfied*
4. Right-click the form header and select **Save**.
5. In the **Assessment Metric Definitions** related list, create the following answer options (see table). Fill in the **Display** and **Value** fields for each answer option. For more information, see Creating Answer Options.

Display	Value
Technician was not satisfactory	2
Issue was not resolved quickly	1
Other	0

Email Address

The second conditional question will appear when users indicate they are interested in future feedback opportunities. The question will provide a field for an email address.

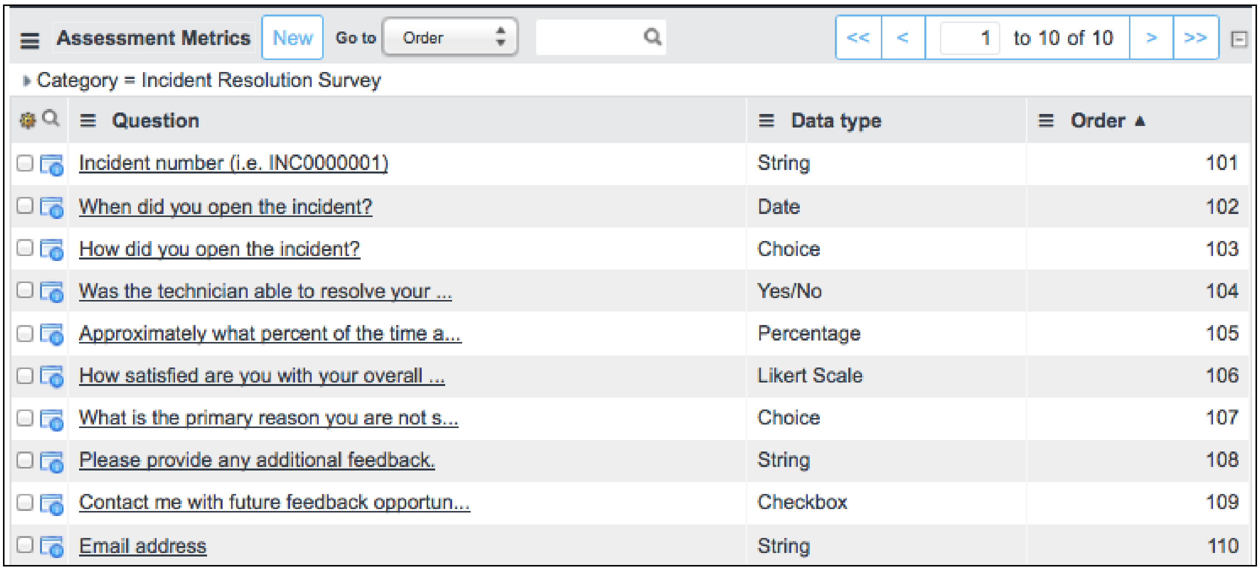
1. On the Survey Category form, in the **Assessment Metrics** related list, click **New**.
2. Fill in the following fields:
   - **Name:** *Email*
   - **Question:** *Email address*
   - **Data type:** *String*
   - **String option:** *Single line*
   - **Mandatory:** Cleared
   - **Depends on:** *Contact me with future feedback opportunities.*
   - **Displayed when:** *Checked*
3. Click **Submit**.

Update Question Order

When you added conditional questions, the system automatically assigned both of them the default question order, **100**. The conditional questions should appear after the questions they depend on, so you need to update the order values.

On the Survey Category form, in the **Assessment Metrics** related list, edit the **Order** values of the following questions to match the following table.

Question	Order
Incident number (i.e. INC0000001)	101
When did you open the incident?	102
How did you open the incident?	103
Was the technician able to resolve your...	104
Approximately what percent of the time a...	105
How satisfied are you with your overall...	106
What is the primary reason you are not s...	107
Please provide any additional feedback.	108
Contact me with future feedback opportun...	109
Email address	110



Question	Data type	Order ▲
Incident number (i.e. INC0000001)	String	101
When did you open the incident?	Date	102
How did you open the incident?	Choice	103
Was the technician able to resolve your ...	Yes/No	104
Approximately what percent of the time a...	Percentage	105
How satisfied are you with your overall ...	Likert Scale	106
What is the primary reason you are not s...	Choice	107
Please provide any additional feedback.	String	108
Contact me with future feedback opportun...	Checkbox	109
Email address	String	110

Make a Question Mandatory

To better interpret your survey results, it is important to know which incident each survey recipient is evaluating. You can require users to provide the incident number.

1. Open the following question: **Incident number (i.e. INC000001)**
2. Select the **Mandatory** check box.
3. Click **Update**.

Publish the Survey

The survey is now ready to be published.

1. Navigate to **Survey Management > View Surveys**.
2. Open the **Incident Resolution Survey** survey definition.
3. Click **Publish**.

Test the Trigger Condition

To ensure that the trigger condition you created is functioning properly, create and resolve an incident.

1. Navigate to **Self-Service > Incidents**.
2. Click **New**.
3. Fill in the fields, if desired, and click **Submit**.
4. On the Incident form, copy the **Number** so you can provide it when you complete the survey.
5. Enter a comment in the **Additional comments** field.
6. Click **Resolve Incident**.
7. Navigate to **Self-Service > My Assessments & Surveys**.

   A survey instance card labeled **Incident Resolution Survey** should appear in your assessment and survey queue.

Note: *To verify that the trigger condition repeat interval of 30 days is enforced, repeat this procedure after you complete the survey. The system will not generate another survey instance assigned to you until 30 days after you received the first survey instance.*

Complete the Survey

Complete the survey to test your customizations. For more information, see Completing Survey Questionnaires.

1. In your assessment and survey queue, on the survey instance card labeled **Incident Resolution Survey**, click **Take Survey**.
2. Answer all the survey questions except for **Incident number (i.e. INC000001)**.
3. Test the conditional questions.
4. Click **Submit**.

   Note that you cannot submit the survey until you answer the mandatory incident number question.
5. Enter the incident number.
6. Click **Submit**.

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/administer/survey-administration/concept/c_TriggerConditions.html

Create a Scheduled Survey for Selected Users

Overview

In this example, assume that your company is building a new website. You want to send a feedback survey to the beta testers each month. As the survey administrator, you will create a scheduled survey that only the beta testers can take. You will create a reusable question template to use on the survey and a survey user group to define the beta testers. To protect the testers' privacy, you will configure the survey to store anonymous responses.

Unless otherwise noted, the survey_admin role is required to complete this example.

Create a Question Template

You will create multiple survey questions for users to rate the difficulty of various actions. Instead of defining the same answer options for all those questions, create a reusable question template before you create the survey. For more information, see Question Templates.

1. Navigate to **Survey Management > Templates**.
2. Click **New**.
3. In the **Name** field, enter **Difficulty**.
4. Right-click the form header and select **Save**.
5. In the **Assessment Template Definitions** related list, create the following template definitions.

Display	Value
Very difficult	0
Difficult	1
Neutral	2
Easy	3
Very easy	4

Create a Survey User Group

In this example there are 10 users who participate in the beta testing program. The same 10 users will complete feedback surveys throughout the program. Create a *survey user group* to define the users. For more information, see Creating Survey User Groups.

To complete this portion of the example, log in as a user with the admin role. Alternatively, activate the Skills Management plugin and log in as a user with the survey_admin and user_admin roles.

1. Navigate to **Survey Management > Administration > User Groups**.
2. Click **New**.
3. Fill in the following fields:
   - **Name:** *Survey Users: Website Beta Testers*
   - **Description:** *Users participating in website beta testing who receive periodic surveys*
4. Right-click the form header and select **Save**.
5. In the **Group Members** related list, click **Edit**.
6. Use the slushbucket to add 10 users to the group members list and click **Save**.

   Do not add yourself to the group members list. You will add yourself as a survey user manually later in the example.

Create the Survey

Use the survey creator to build the survey. For more information, see Using the Survey Creator.

1. Navigate to **Survey Management > Create Survey**.
2. In the **Name** field, enter **Website Beta Tester Feedback**.
3. In the **Survey Questions** section, add the questions (see table).
4. [Optional] Click **Preview** to see what the survey will look like. Click **Close** when you are finished.
5. In the **Survey User Access** section, select the **Members of the selected groups can take this survey** option.
6. In the group selection slushbucket, add the **Survey Users: Website Beta Testers** group.
7. At the bottom of the survey creator, click **Save as Draft**.

Question	Answer Data Type	Additional Fields
Which browser did you use to view the site?	Choice	Enter the following answer options: 1. *Firefox* 2. *Chrome* 3. *Safari* 4. *Internet Explorer* 5. *Opera* 6. *Other*
How would you rate the site overall? Enter a number from 1 to 10 where 10 is best.	Number	**Min:** *1* **Max:** *10*
How easy was it to use the site menu?	Template	**Template option:** *Difficulty*
How easy was it to find information on the site?	Template	**Template option:** *Difficulty*
How easy was it to understand the site content?	Template	**Template option:** *Difficulty*
Did you use the site search feature?	Yes/No	None
Did you view any of the multimedia content?	Yes/No	None
Did you experience any issues with the site?	Yes/No	None
How can we improve the site?	String	**String option:** *Multiline*

Set Additional Survey Options and Publish the Survey

Next, configure the survey to save anonymous user responses to protect the privacy of the respondents, and set the *schedule period* so the system can automatically send the survey to the beta testers every month.

After you save the survey in the survey creator, the survey definition record you just created appears automatically. Open the record.

1. In the **Survey Users** related list, note that your survey user group members are listed. The system automatically added them as *survey users* when you used the survey creator. For more information, see Administering Survey Users.
2. Fill in the following fields:
   - **Anonymize responses:** Select the check box.

     When users complete the survey, their names will not be stored with their responses.
   - **Schedule period:** *Monthly*

     When you publish the survey, the system will assign each survey user an instance of the survey each month. For more information, see Schedule Periods.
   - **Introduction:** *Thank you for participating in our beta testing program! You should have recently visited our website* [1] *as a beta tester. Please tell us about your most recent experience with the site. In a continuing effort to improve, we will use your feedback to update the design, navigation, and functionality of our website.*
   - **End note:** *We appreciate your feedback and look forward to hearing from you in next month's feedback survey!*
3. Click **Publish**.
4. [Optional] Navigate to **Survey Management > Survey Instances** to verify that the system generated a survey instance for each of the survey users.

Test the Survey URL

When there are survey users associated with a survey, the survey is restricted so only those users can use the survey URL. For more information, see the information about *general URLs* in Sharing Survey URLs.

For this portion of the example, ensure that you are logged in as a user who is *not* listed as a survey user.

1. Open the **Website Beta Tester Feedback** survey definition.
2. Under **Related Links**, click **View Survey URL**.
3. Copy the URL and click **OK** or **Cancel**.
4. Navigate to the URL.

   Note that you are not authorized to take the survey.

Add Another Survey User

Add yourself as a survey user to grant yourself access to the survey.

1. Open the **Website Beta Tester Feedback** survey definition.
2. In the **Survey Users** related list, click **New**.
3. In the **User** field, select the user you are logged in as.
4. Click **Submit**.
5. Click **Send Invitations**.

   The system checks to see if any of the survey users are eligible to receive a new instance of the survey. Because the schedule period is set to **Monthly** and the other survey users already have survey instances, the system generates a survey instance for you only.
6. Navigate to the survey URL again.

   The survey questionnaire opens.

Complete the Survey

Complete the survey to test your customizations. For more information, see Completing Survey Questionnaires.

1. Use one of the following options to open your survey instance:
   - Navigate to the survey URL.
   - Navigate to **Self-Service > My Assessments & Surveys**. On the survey instance card labeled **Website Beta Tester Feedback**, click **Take Survey**.
2. Answer all the survey questions.
3. Click **Submit**.

Verify that Responses Are Anonymous

You selected the **Anonymize responses** check box on the Survey Definition form, so the names of the survey respondents are not stored with their responses.

1. Navigate to **Survey Management > View Surveys**.
2. Open the **Website Beta Tester Feedback** survey definition.
3. Under **Related Links**, click **View Responses**.

   Note that the **Assigned to** column is empty.

References

[1] http://www.example.com

Article Sources and Contributors

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