Wizards

Survey Wizards

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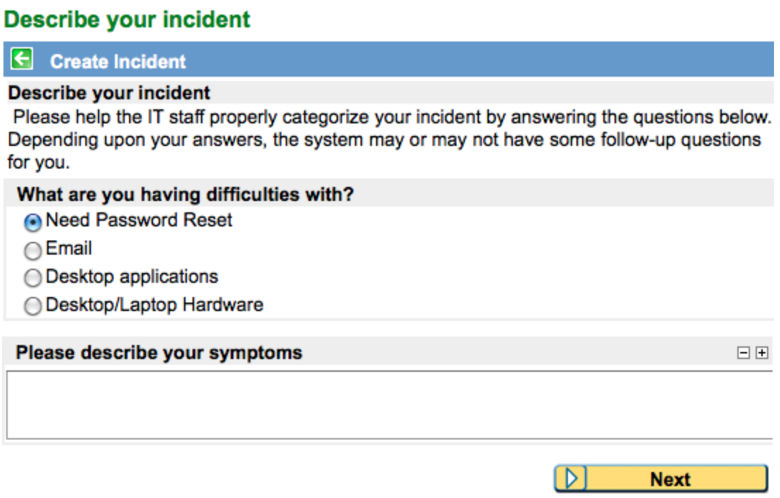
Wizards

Note: *This article applies to Fuji. For more current information, see Wizards* [1] *at* http://docs.servicenow.com **The ServiceNow Wiki is no longer being updated.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

Administrators can create wizards to provide a step-by-step sequence of dialog boxes that lead the user through a procedure. For example, a wizard may lead users through reporting an incident (creating an incident record) without opening a list or form.



Example. *Create Incident* wizard, step 1.

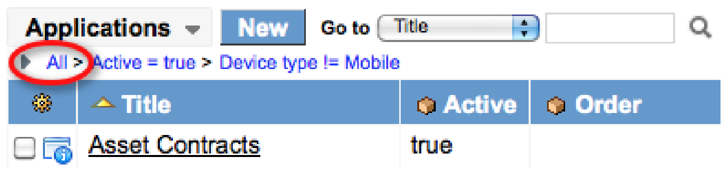
Note: *If you intend to create wizards for the purpose of ordering goods and services from the service catalog, we recommend that you use Service Catalog order guides instead of wizards.*

Activating System Wizards

The System Wizards application is not active by default.

To activate system wizards:

1. Navigate to **System Definition > Applications** (pre-Calgary release) or **System Definition > Application Menus** (Calgary release).
2. In the breadcrumbs, click **All** to display both active and inactive applications.
3. Search for **System Wizards**.
4. Ensure the **Active** field is set to *true*.



Display active and inactive applications.

Concepts

Wizards are built on the following concepts:

- **Panels** - screens that appear in a defined order. Each step in a wizard is represented by a panel. The available panel types are:
    - Wizard panel - prompts user to answer questions
    - Catalog checkout - displays an order confirmation screen
    - Catalog order - displays listings for service catalog items
    - KB viewer - displays a knowledge base article
    - Record generator - creates a record in a table
    - Survey (requires the Survey Wizard plugin)
- **Variables** - questions that collect and store user input. Variables are defined in a wizard and can included on more than one panel.
- **Transitions** - define logic used to move between panels. Transition logic may be based on user input.

Creating a Basic Wizard

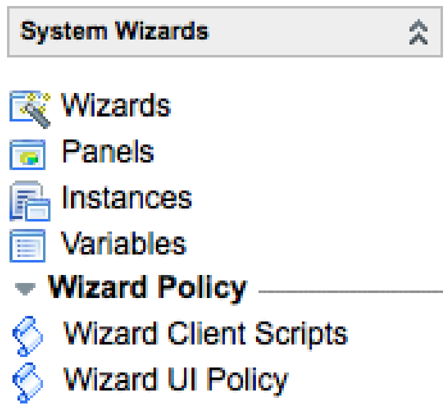
The following example creates a basic wizard that reports an incident. For more advanced examples, see:

- Creating an Advanced Wizard (Demo)
- Creating a Survey Wizard (Demo)

Create the Wizard

Create the wizard:

1. Activate the system wizards application, if necessary.
2. Navigate to **System Wizards > Wizards**.
3. Click **New**.
4. Enter the wizard **Name** of *Report Incident*.
5. Right-click the header and select **Save**.



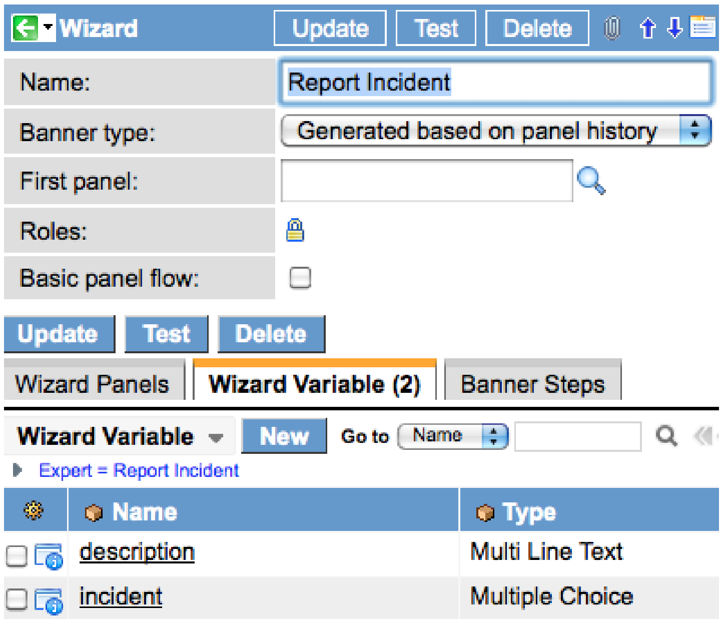
Create the Wizard

Define Variables

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

Define wizard variables:

1. In the **Wizard Variable** related list, click **New**.
2. Enter the variable details.
   - **Type**: *Multiple Choice*
   - **Name**: *incident*
   - **Question**: *What are you having difficulties with?*
3. Right-click the header and select **Save**.
4. In the **Question Choices** related list, click **New**.
5. Enter *Email Issue* in the **Text** and **Value** fields, and click **Submit**.
6. Repeat steps 4 – 5 for the following question choices:
   - *Computer Issue*
   - *Password Reset*
7. In the **Wizard Variable** related list, click **New**.
8. Enter the variable details and click **Submit**.
   - **Type**: *Wide Single Line Text*
   - **Name**: *description*
   - **Question**: *Please describe your symptoms*



Define Variables

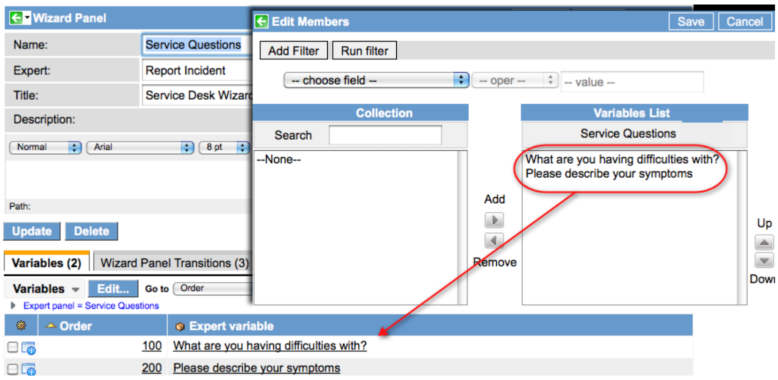
Create Panels

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

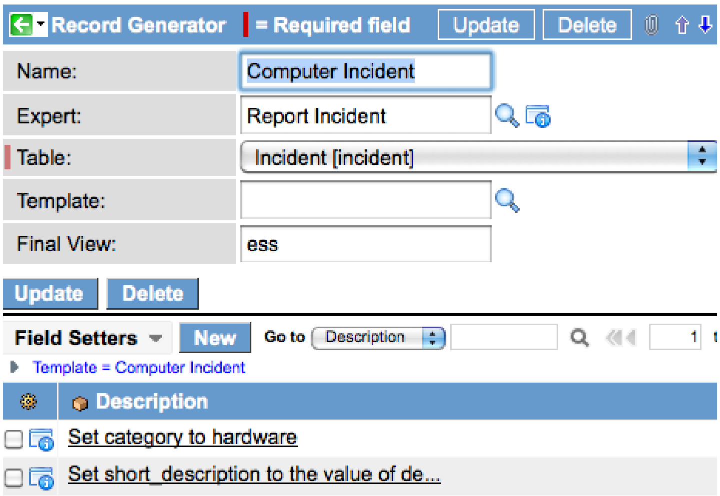
Create the first panel:

1. In the **Wizard Panels** related list, click **New**.
2. Select a **Type** of *A panel that prompts the user to answer questions* .
3. Enter the panel details.
   - **Name**: *Service Questions*
   - **Title**: *Service Desk Wizard*
4. Right-click the header and select **Save**.
5. In the **Variables** related list, click **Edit...**.
6. Using the slushbucket, select and arrange the variables as listed:
   1. *What are you having difficulties with?*
   2. *Please describe your symptoms*

7. Click **Update**.



Create the first panel. Select and arrange the variables.



Create the second panel options. *Computer Incident* panel.

Create the second panel options:

1. In the **Wizard Panels** related list, click **New**.
2. Select a **Type** of *A panel that creates something (like a change request or an incident).*
3. Enter the panel details and click **Submit**.
   - **Name**: *Email Incident*
   - **Table**: *Incident [incident]*
   - **Final View**: *ess*
4. Right-click the header and select **Save**.
5. In the **Field Setters** related list, click **New**.
6. Enter the field setter details and click **Submit**.
   - **Type**: *Set field to a variable*
   - **Field**: *Short description*
   - **Variable**: *description*
7. In the **Field Setters** related list, click **New**.
8. Enter the field setter details and click **Submit**.
   - **Type**: *Set field to a specific value*
   - **Field**: *Category*
   - **Value**: *software*
9. Repeat steps 1 – 8 to create additional panels with the values listed in the table.

-- Second Panel Options Table --

Step 3. Panel Name	Step 8. Category Value
Computer Incident	hardware
Password Incident	network

Define Transitions

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

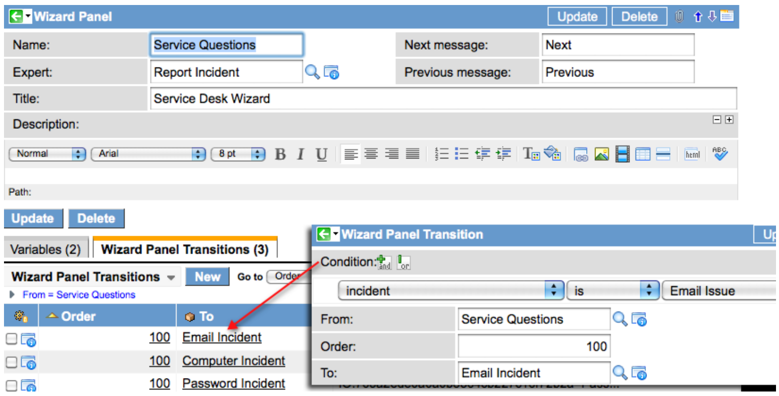
Define transitions:

1. In the **Wizard Panels** related list, click **Service Questions**.

2. In the **Wizard Panel Transitions** related list, click **New**.
3. Enter the transition details and click **Submit**.
4. Repeat steps 2 – 3 for all panel transitions in the table.

-- Panel Transition Details Table --

Condition	From	To
incident is Email Issue	Service Questions	Email Incident
incident is Computer Issue	Service Questions	Computer Incident
incident is Password Reset	Service Questions	Password Incident



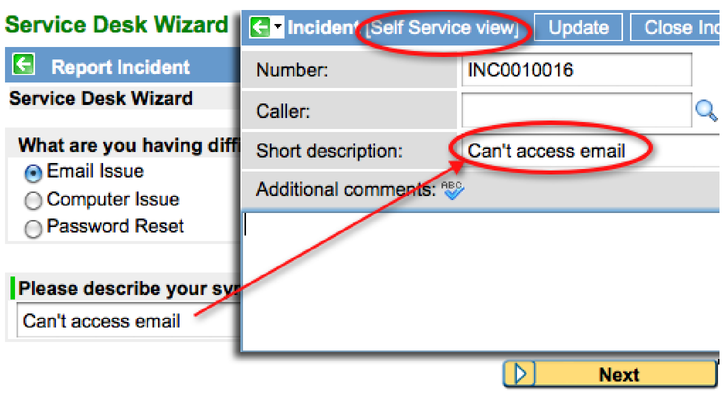
Define Transitions

Test the Wizard

Run through several scenarios to test transition logic and record generation.

Test the wizard:

1. Navigate to **System Wizards > Wizards**.
2. Click **Report Incident**.
3. Click **Test**.
4. Enter the following information and click **Next**.
   - **What are you having difficulties with?**: *Email Issue*
   - **Please describe your symptoms**: *Can't access email*
5. Verify that a new record is created and the values match step 4.
6. Repeat steps 1 – 5 to test each multiple choice answer.

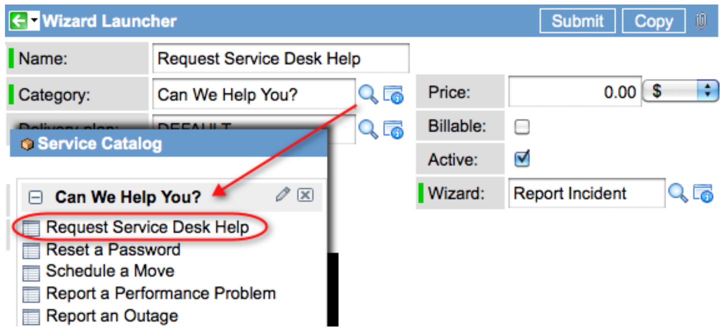


Test the Wizard

Publish the Wizard

Note: *To learn more, see Publishing Wizards.*

Create a wizard launcher to make the wizard available through the service catalog homepage:



Publish the Wizard

1. Navigate to **Service Catalog > Wizards**.

   If you do not see **Wizards** under **Service Catalog**, right-click the **Service Catalog** application name, click **Edit Application Menu**, scroll down to the **Wizards** line, and change the **Active** setting to **true**.
2. Click **New**.
3. Enter the wizard launcher details and save the record.
   - **Name** - *Report an Incident*
   - **Category**: *Can We Help You?*
   - **Wizard**: *Report Incident*
   - **Active**: select the check box

Advanced Customization

An advantage of wizards is the ability to implement advanced, custom functionality with a user-friendly interface. Create advanced wizards using:

- Wizard UI Policy and Client Scripts - create dynamic effects and validation for wizards, panels, and variables
- Wizard Scripts - run scripts from record generator panels, transitions, and UI policies

References

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

Wizard Variables

Overview

Wizard variables are questions that collect and store user input. Define variables for a wizard and then add them to wizard panels. Use data collected by wizard variables to:

- Define transition conditions
- Set field values in record generators
- Define dynamic functionality with UI policy and client scripts
- Implement advanced functionality with wizard scripts

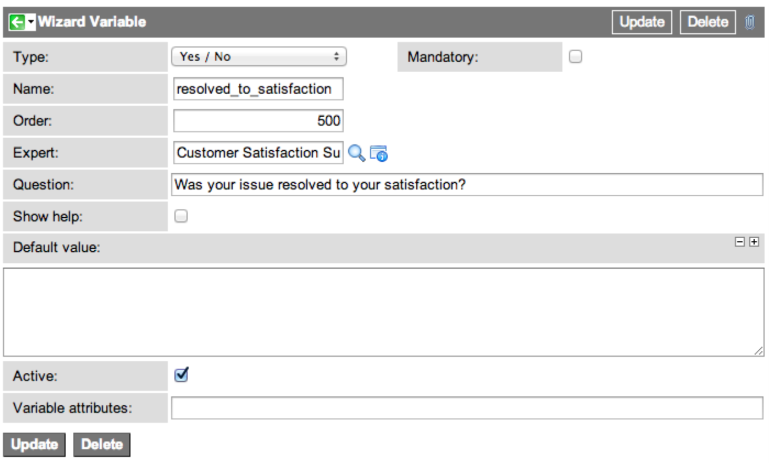
Note: *The System Wizards application is not active by default. To use wizards, see Activating System Wizards.*

Defining Wizard Variables

To define a variable:

1. Navigate to **System Wizards > Wizards**.
2. Open the wizard to which you are adding a variable.
3. In the **Wizard Variable** related list, click **New**.
4. Select the variable **Type**.

   Wizards use the same variable types as service catalog items. To learn more, see Variable Types.
5. Enter the name used by the system, for example: **resolved_to_satisfaction**.
6. Enter an order number and select the name of the associated Wizard in the **Expert** field.
7. Enter a descriptive question in the **Question** field.
8. Enter the remaining variable details if necessary and save the record.



Creating a Wizard variable

Defining Question Choices

Some variable types require choices. For example, a multiple choice question—such as *What kind of e-mail account do you want?*—requires options—such as *Exchange* and *Unix*.

To define question choices for a variable:

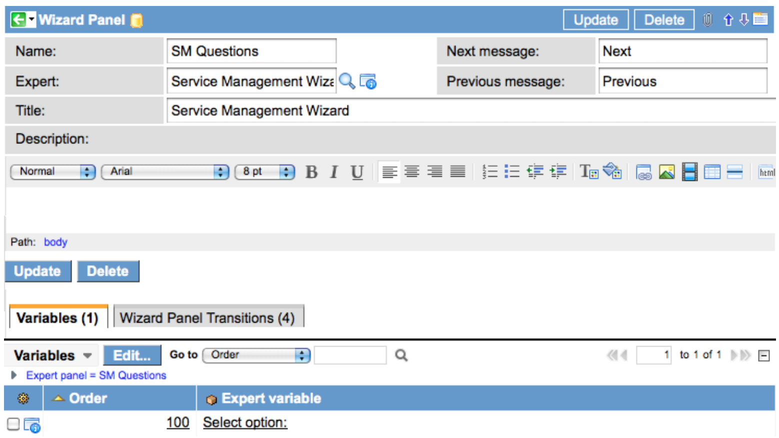
1. Open the variable definition.
2. In the **Question Choices** related list, click **New**.
3. Enter the question choice details and save the record.
   - **Text** - option the user sees
   - **Value** - value stored in the variable

4. Repeat steps 2 – 3 for all available options.

Adding Variables to Panels

To collect user input, add variables to a panel that prompts user to answer questions (wizard panel) or a survey panel (requires Survey Wizard plugin):

1. Navigate to **System Wizards** > **Wizards**.
2. Open the wizard.
3. In the **Wizard Panels** related list, open the panel to which you are adding a variable.
4. In the **Variables** related list, click **Edit...**.
5. Using the slushbucket, add and arrange the order in which variables appear on the panel. Only variables defined on the wizard are available on a panel.



Wizard panel

Wizard Panels

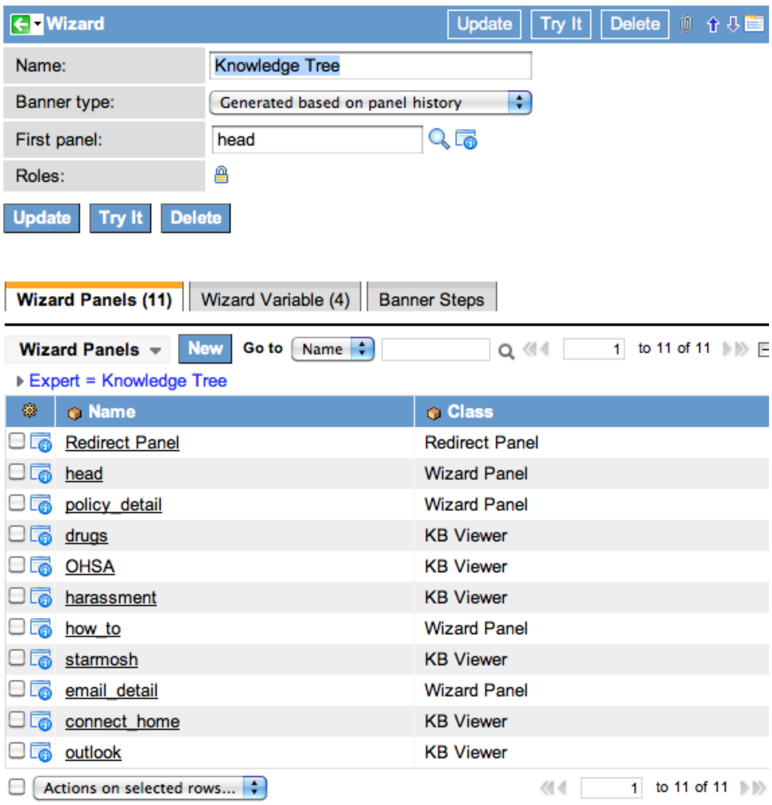
Overview

Wizard panels are screens that appear in a defined order. Each step in a wizard is represented by a panel.

Note: *The System Wizards application is not active by default. To use wizards, see Activating System Wizards.*

Creating Panels

1. Navigate to **System Wizards > Wizards**.
2. Open the wizard to which you are adding a panel.
3. In the **Wizard Panels** related list, click **New**.
4. Select the type of panel to create.



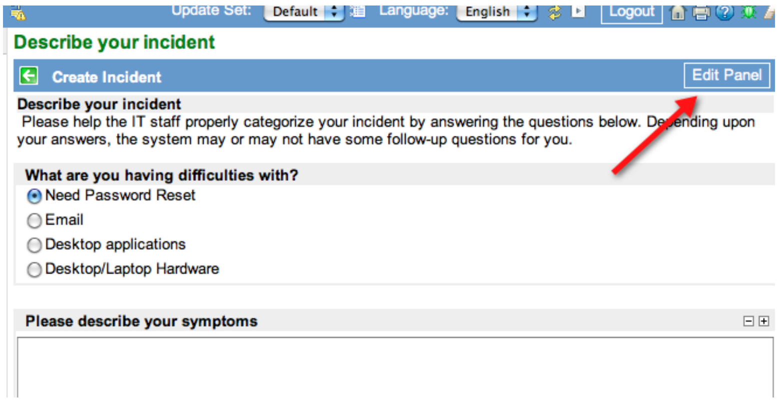
Create a panel

5. Enter basic panel information.
   - **Name** - brief description of the panel
   - **Expert** - name of the wizard
   - **Next message** - label on the button that transitions to the next panel. This option does not apply for the last panel.
   - **Previous message** - label on the button that transitions to the previous panel. This option does not apply for the first panel.
6. Enter type-specific information and save the record.
   - Prompts user to answer questions (wizard panel)
   - Catalog Checkout
   - Catalog Order
   - KB Viewer
   - Redirect
   - Record Generator
   - Survey (requires Survey Wizard Plugin)

Editing Panels

As of the Aspen release, an **Edit Panel** button is available on wizard panels when testing the wizard. The button is available if the user can write to the expert record. To control who can access this button, edit the write ACL on the Wizard [expert] table.

1. Navigate to **System Wizards > Wizards**.
2. Open the wizard containing the panel you want to edit.
3. Click **Try It**.
4. Click **Edit Panel**.



Edit a panel

Wizard Panels

A **wizard panel** prompts users to answer questions. Wizard panel type-specific information is:

- **Title** - label that appears above the panel in wizard view
- **Description** - text that appears above questions in wizard view
- **Variables** - questions that collect user input. To learn more, see Wizard Variables.

Catalog Order and Checkout Panels

A **catalog order panel** displays listings for service catalog items in tabbed view. A **catalog checkout panel** displays an order confirmation screen for the items on the preceding catalog order panel. Use these panels to create an order guide using wizards.

KB Viewers

A **KB Viewer** panel displays a knowledge base article. KB Viewer type-specific information is:

- **KB Article** - reference to the desired knowledge base article
- **Title** - label that appears above the article in wizard view

Redirect

A **Redirect** panel specifies a URL to which the user is taken upon transition to the panel. Redirect type-specific information is:

- **URL** - URL location to which user should be taken
- **Advanced** - select this option to use a script
- **Script** - script that runs when the panel is used. To learn more, see Wizard Scripts.

Record Generators

A **record generator** panel creates a record in a table, such as an incident or change request. Record generators may be the final step in a wizard. Record generator type-specific information is:

- **Table** - table in which to create a record (select *Global* when using a script)
- **Template** (optional) - define field values on the new record using a template
- **Final view** (optional) - enter the view in which to show the submitted form (such as *ESS*)
- **Script** - script that runs when the panel is used. To learn more, see Wizard Scripts.
- **Field Setters** - define field values in the target table. To learn more, see Field Setters.

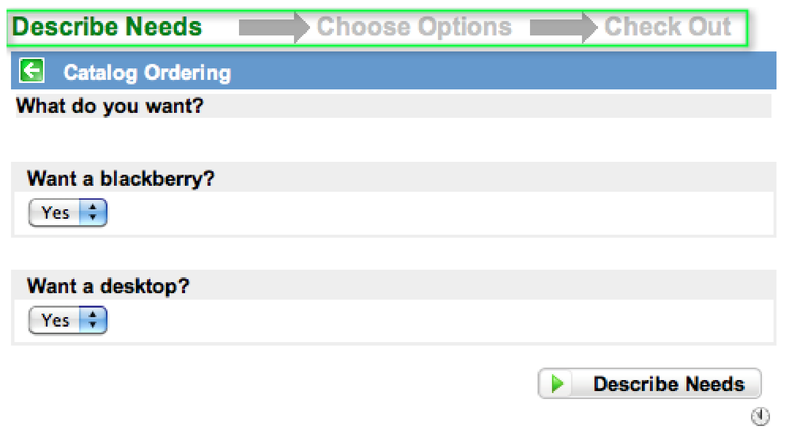
Field Setters

A **field setter** defines a field value for a record created by a record generator. Define field setters using:

- **Template** - name of the record generator panel
- **Type**
  - To define a static value (the same for each record created by the record generator), select **Set field to a specific value**.
  - To define a value based on a wizard variable, select **Set field to a variable**.
- **Field** - select the field name
- **Value** - enter the value (static) or select the wizard variable name

Using Wizard Banners

The wizard banner is a graphical flow of wizard steps displayed at the top of a wizard. Steps displayed in this banner can be manually defined or automatically generated.



Wizard Banner

To change the banner settings:

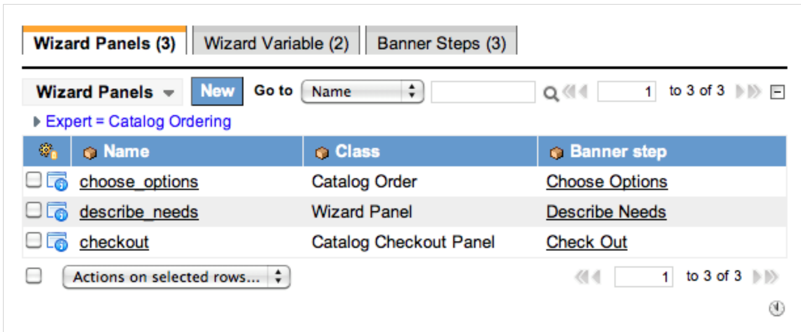
1. Navigate to **System Wizards > Wizards.**
2. Create or open a wizard.
3. Set the **Banner type** field:
   - Select **Fixed number of (user defined) steps** for manually defined steps.
   - Select **Generated based on panel history** for automatically generated steps. Automatically generated steps do not display initially but are added as the user reaches each step. Automatic banner text is generated using the **Title** field of each wizard panel.
   - Select **None** to disable the wizard banner.

To create fixed wizard banner steps:

1. Select **Fixed number of (user defined) steps** from the **Banner type** dropdown.
2. Select the **Banner steps** related list and click **New**.
3. Assign a name to your banner step. This name is what appears on the wizard.
4. Assign a display order (such as 100, 200, 300).
5. Repeat steps 2 – 4 for each banner step in the wizard.

6. On the wizard record, click the **Wizard Panels** related list.
7. In the **Banner step** field, enter the banner step that is completed when the wizard panel is displayed. Completed steps display in green in the wizard banner.

   Note: You may need to configure the list to add the **Banner step** field.



Banner steps assigned to wizard panels

Wizard Transitions

Overview

Transitions define logic used to move between panels in wizards. Transition logic may be based on a predefined order (basic panel flow) or user input (defined transitions).

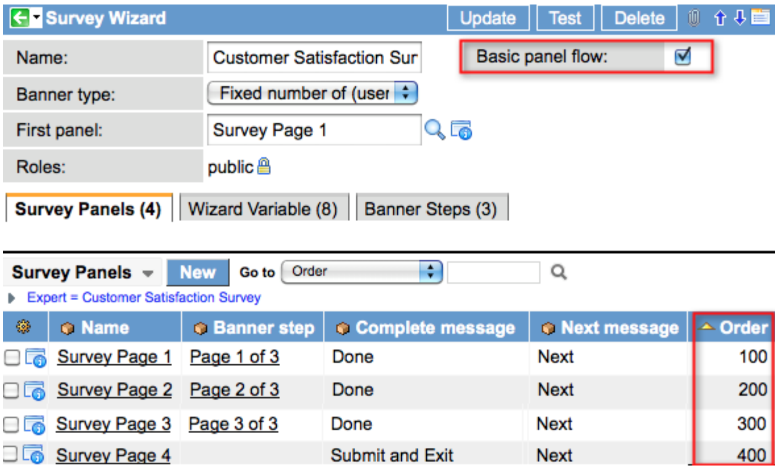
Note: *The System Wizards application is not active by default. To use wizards, see Activating System Wizards.*

Basic Panel Flow

Basic panel flow moves through wizard panels in order, without the need to define logic for each transition. A wizard may use either basic panel flow or defined transitions, but not both.

To use basic panel flow for a wizard:

1. Open the wizard.
2. Select the **Basic panel flow** check box. If necessary, configure the wizard form to add the field.
3. Enter the **First panel** in the reference field.
4. For each panel, define an **Order**. If necessary, configure the panel form to add the field.

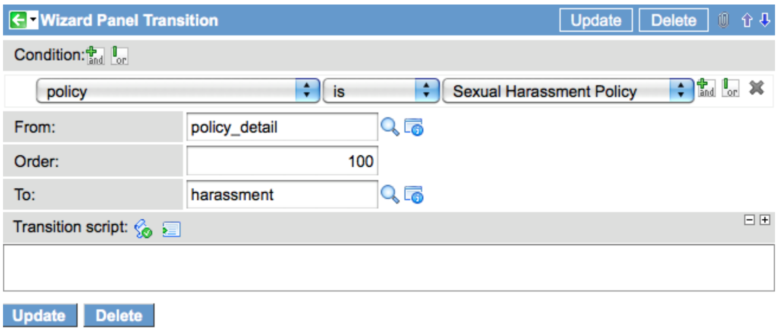


Basic panel flow

Defining Transitions

To define a transition for a panel:

1. Open the panel.
2. In the **Transitions** related list, click **New** or select the transition to edit.
3. Using the condition builder, define a transition condition based on wizard variables. Leave the condition empty to use the transition in all cases.
4. In the **To** field, select the next panel.
5. In the **From** field, select the previous panel.
6. (Optional) Define a **Transition script** that runs when the transition is used. To learn more, see Wizard Scripts.



Defined panel transitions

Publishing Wizards

Overview

Administrators can provide users with access to wizards:

- Using links
- As an item in the service catalog

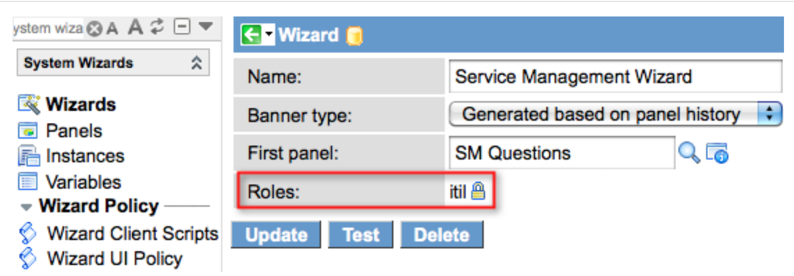
Administrators can also restrict user access to wizards by role and make wizards available to the public (users that are not logged in).

Note: *The System Wizards application is not active by default. To use wizards, see Activating System Wizards.*

Role Access Control

To define the user roles that have access to a wizard:

1. Navigate to **System Wizards > Wizards**.
2. Open the wizard.
3. In the **Roles** field, define the user roles that have access to the wizard. Leave the field blank to allow access for all users.



Restrict wizard access by role

Linking to Wizards

Provide access to wizards via links, such as defining a new module or sending a link via email (public wizards only).

Desired Action	URL schema
Start a new wizard or resume an in progress wizard if the user is logged in	https://<base URL>/nav_to.do?uri=expert_shell.do?sysparm_sys_id=<wizard sys_id>
Require the user to restart a wizard from the beginning regardless of previous progress	https://<base URL>/nav_to.do?uri=expert_shell.do?sysparm_sys_id=<wizard sys_id>%26sysparm_initial=true

Example. Define a Wizard Module in Self-Service

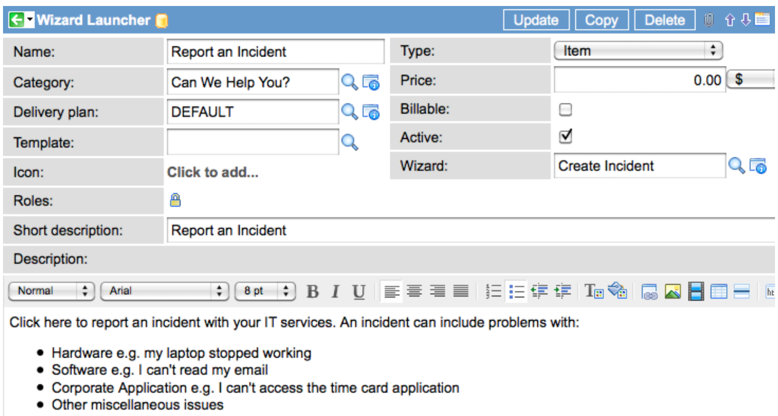
To define a wizard module in the self-service application:

1. Navigate to **System Wizards > Wizards**.
2. Open the wizard.
3. In the **Roles** field, add the user roles that have access to the wizard.
4. Right-click the header and copy the sys_id for the wizard.
5. Click **Update**.
6. In the navigation pane, right-click **Self-Service** and select **Edit Application**.
7. In the **Modules** related list, click **New**.
8. Enter the following information and save the record.
    - **Title** and **Order**
    - **Link type**: *URL (from arguments)*
    - **Arguments**: */expert_shell.do?sysparm_sys_id*=<wizard sys_id from step 2>

Adding Wizards to the Service Catalog

Create a wizard launcher to make the wizard available through the service catalog homepage:

1. Navigate to **Service Catalog > Wizards**.
2. Click **New**.
3. Enter the wizard launcher details and save the record.
    - **Name** - name by which the wizard appears in the service catalog
    - **Category** - category under which the wizard appears
    - **Wizard** - reference to the wizard
    - **Active** - select the check box
    - **Short Description** and **Description** (optional)



Wizard Launcher

Making a Wizard Public

Public wizards are available for use without logging in. Reasons to make a wizard public include:

- Allowing non-users to report an incident
- Collecting anonymous survey responses (requires Survey Wizard Plugin)

Once a wizard is made public, deliver it using a link via email or a module on the welcome page (available before a user has logged in).

For a full description of the process, see Making Wizards Public.

Advanced Customization

Wizard UI Policy and Client Scripts

Overview

Administrators and users with appropriate access rights can create dynamic effects for wizards using UI policies and client scripts, including:

- Get or set variable values
- Hide or display variables
- Make variables mandatory
- Validate form submission

UI policies apply effects based on conditions constructed with a condition builder. Client scripts accomplish more advanced functionality. Because UI policies do not require scripting, they are less likely to need maintenance after system updates.

Note: *The System Wizards application is not active by default. To use wizards, see Activating System Wizards.*

Wizard UI Policy

UI policies can be applied to wizards. To learn more, see Creating a UI Policy.

To create a UI policy for wizards:

1. Navigate to **System Wizards** > **Wizard Policy** > **Wizard UI Policy**.
2. Click **New** or select the policy to edit.
3. Enter the UI policy details and save the record.

Field	Input Value
Wizard	Select the wizard to which the UI Policy applies.
Reverse if false	Select the check box to reverse the UI policy if the wizard condition statement evaluates to *false*.
Order	Enter the sequence in which this condition is evaluated if more than one matching condition exists. The order is evaluated from the lowest value to the highest value.
Global	This field is not used for wizards.
Short description	Enter a brief description.
Wizard Conditions	Create conditions for the UI policy using wizard variables. The policy is applied if the conditions evaluate to *true*.
On load	Select the check box to apply the UI policy when the form is loaded. Clear the check box to apply the policy only when the form is changed.
Run scripts	Select the check box to use the **Execute if true** and **Execute if false** scripting fields. Scripts are necessary to apply a UI policy other than **Read Only**, **Mandatory**, or **Visible**. For example, you must create a script to apply a UI policy for a specific role.

Active	Select the check box to enable the UI policy. Clear the check box to disable it.
Inherit	Select the check box for other tables to inherit the UI policy. This option only applies to custom tables that extend the *expert_ui_policy* table.

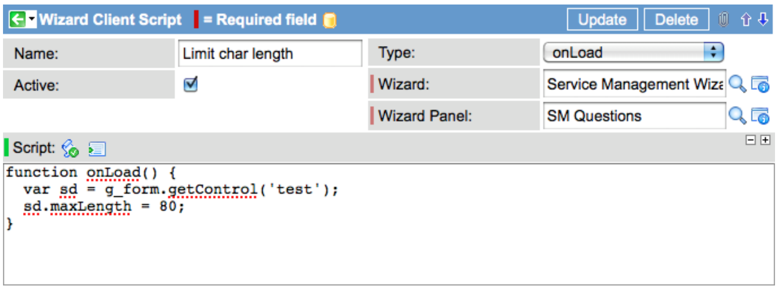
Wizard Client Scripts

Wizard client scripts can create advanced dynamic effects. The following table summarizes differences between standard and wizard client scripts. To learn more, see Client Scripts.

Standard Client Scripts	Wizard Client Scripts
Apply to specific table	Apply to specific wizard and panel
Apply to specific field in the table	Apply to specific variable in the wizard **Note:** Variables must have a name to be accessible in client scripts.

To create a wizard client script:

1. Navigate to **System Wizards** > **Wizard Policy** > **Wizard Client Scripts**.
2. Click **New** or select the client script to edit.
3. Enter the client script details and save the record.



Wizard Client Script

Examples

To get the value of a variable:

```
g_form.getValue('variable_name');
```

To restrict the number of characters a user can enter in a variable:

```
function onLoad() {
  var sd = g_form.getControl('variable_name');
  sd.maxLength = 80;
}
```

Note: *Because wizard panels are different from forms, not all g_form methods function properly in wizard client scripts. Test all methods to determine whether they function properly before using them.*

Wizard Scripts

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

Administrators can create scripts to implement advanced custom functionality using wizards. Use wizard scripts in record generator panels, transitions, and UI policies.

Note: *The System Wizards application is not active by default. To use wizards, see Activating System Wizards.*

Referencing Variables in Wizard Scripts

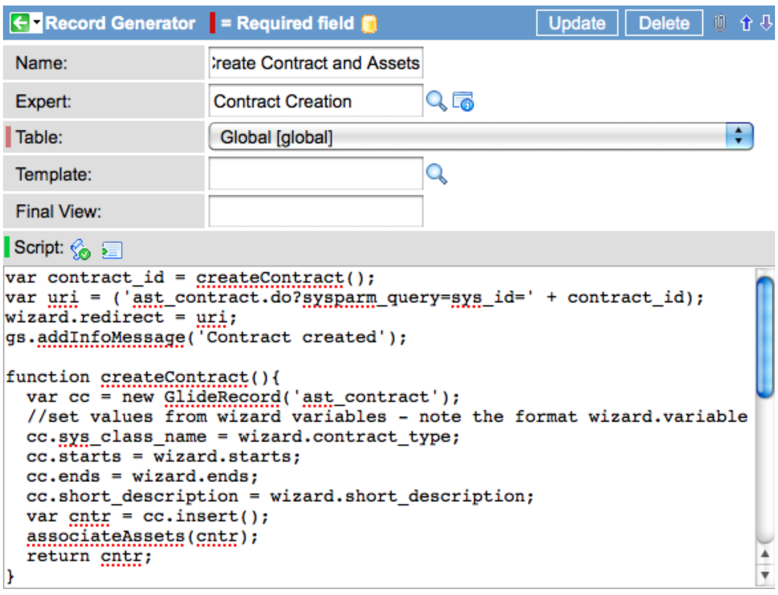
To reference a wizard variable in a script, use the format *wizard.<name>*, where *<name>* is the value in the **Name** field of the variable definition.

Wizard Scripts on Record Generators

Use wizard scripts in record generator panels to create records in any table, including on more than one table.

To use a script in a record generator:

1. In the **Table** field, select *Global*.
2. Enter a script in the **Script** field. Configure the form to add the field, if necessary.



Example. Record generator script.

Examples

Example 1.

```
//Find a user in the sys_user table with the wizard variable 'EmpName'
function getUser(){
     var gu = new GlideRecord('sys_user');
     gu.addQuery('sys_id',wizard.EmpName);
     gu.query();
     if(gu.next()){
          gs.addInfoMessage('Found user ' + gu.name)
     }
}
```

Example 2.

```
//Loop through items in a wizard list collector with variable name
astList
function removeAssets(){
     var items = wizard.astList.toString();
     items = items.split(',');
          for (var i =0; i < items.length; i++) {
             //got the asset id
             var sys_id = items[i];
          }
}
```

Example 3.

```
//Set the url on wizard completion - user will be redirected to this
location
var uri = ('sys_user_list.do?sysparm_query=sys_id=' + wizard.EmpName);
wizard.redirect = uri;
```

References

[1] https://docs.servicenow.com/bundle/jakarta-servicenow-platform/page/script/server-scripting/concept/c_WizardScripts.html

Creating an Advanced Wizard (Demo)

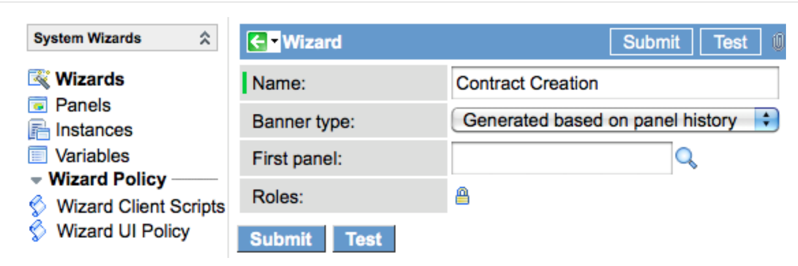
Overview

This example creates a wizard that associates assets and details and then creates a contract with this information. The wizard uses a script to create a new record.

Step 1. Create the Wizard

Create the wizard:

1. Activate the system wizards application, if necessary.
2. Navigate to **System Wizards** > **Wizards**.
3. Click **New**.
4. In the **Name** field, enter *Contract Creation*.
5. Right-click the header and select **Save**.



Contract Creation wizard

Step 2. Define Variables

Define wizard variables:

1. In the **Wizard Variable** related list, click **New**.
2. Enter the variable details and save the record.
3. Repeat steps 1 – 2 for all variables in the table.

-- Wizard Variables Details Table --

Type	Name	Question	Additional configuration
Yes/No	assets	Associate assets?	
Select Box	contract_type	Which type of contract?	**Mandatory**: true **Choice table**: Contract [ast_contract] **Choice field**: Contract type
Date	starts	Start Date	
Date	ends	End Date	
Single Line Text	short_description	Enter short description for contract	
List Collector	asset_select	Asset Listing	**List Table**: Configuration Item[cmdb_ci]

Step 3. Create Panels

Create the first two panels and add variables:

1. In the **Wizard Panels** related list, click **New**.
2. Select the panel **Type** of *Prompts user to answer questions*.
3. Enter the **Name**, then right-click the header and select **Save**.
4. In the **Variables** related list, click **Edit...**.
5. Using the slushbucket, select and arrange the variables as listed in the table.

-- Panel Variables Table --

Name	Add variables
1 Contract Screen	Associate assets? Which type of contract? Start Date End Date Enter short description for contract
2 Asset Screen	Asset Listing

Create the third panel and add field setters:

1. In the **Wizard Panels** related list, click **New**.
2. Select the panel **Type** of *Creates something (record generator)*.
3. Enter the following information, then right-click the header and select **Save**.
   - **Name**: *3 Contract No Assets*
   - **Table**: *Contract [ast_contract]*
4. In the **Field Setters** related list, click **New**.
5. Enter the field setter details and save the record.
6. Repeat steps 4 – 5 for all field setters in the table.

-- Field Setter Details Table --

Type	Field	Variable
Set field to a variable	Contract type	contract_type
Set field to a variable	Short description	short_description
Set field to a variable	Ends	ends
Set field to a variable	Starts	starts

Create the fourth panel and add a script:

1. In the **Wizard Panels** related list, click **New**.
2. Select the panel **Type** of *Creates something (record generator)*.
3. Enter the following information, then right-click the header and select **Save**.
   - **Name**: *4 Create Contract and Assets*
   - **Table**: *Global*
4. Paste the example script into the **Script** field. Configure the form to add the field, if necessary.

Example script:

```
//Call the createContract function and get back the id of the contract
that was created
var contract_id = createContract();
//Construct a url that will be used to redirect the user after
submission
var uri = ('ast_contract.do?sysparm_query=sys_id=' + contract_id);
//Redirect the user to the url
wizard.redirect = uri;
gs.addInfoMessage('Contract created');

//Create a new contract
function createContract(){
  var cc = new GlideRecord('ast_contract');
  //set values from wizard variables - note the format wizard.variable
  cc.sys_class_name = wizard.contract_type;
  cc.starts = wizard.starts;
  cc.ends = wizard.ends;
  cc.short_description = wizard.short_description;
  var cntr = cc.insert();
  //We created a new contract and have the id so now we need the assets
 to associate
  associateAssets(cntr);
  return cntr;
}


//This is the way we loop through the elements in a list collector -
assets in this case
function associateAssets(id){
  var items = wizard.asset_select.toString();
  items = items.split(',');
  for (var i =0; i < items.length; i++) {
    var sys_id = items[i];
    if (sys_id != ''){
       var rl = new GlideRecord('ast_contract_instance');
       rl.ast_contract = id;
       rl.ci_item = sys_id;
       rl.insert();
     }
  }
}
```

Step 4. Define Transitions

Define transitions:

1. Open a panel.
2. In the **Wizard Panel Transitions** related list, click **New**.
3. Enter the transition details and save the record.
4. Repeat steps 1 – 3 for all panel transitions in the table.

-- Panel Transition Details Table --

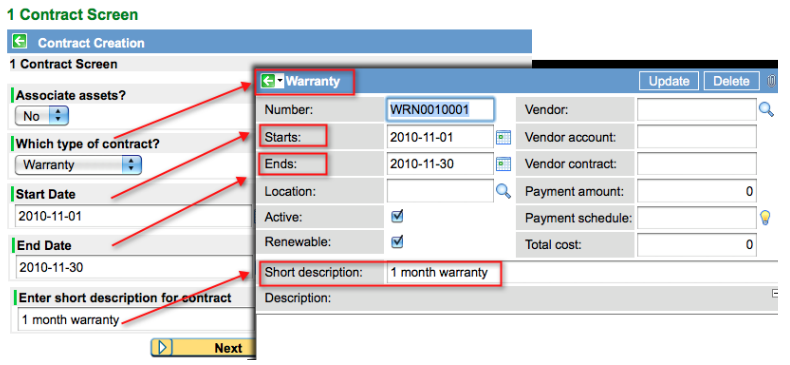
Panel	Condition	From	To
1 Contract Screen	assets is Yes	1 Contract Screen	2 Asset Screen
1 Contract Screen	assets is No	1 Contract Screen	3 Contract No Assets
2 Asset Screen		2 Asset Screen	4 Create Contract and Assets

Step 5. Test the Wizard

Run through several scenarios to test transition logic and record generation.

Test the wizard for a record with no assets:

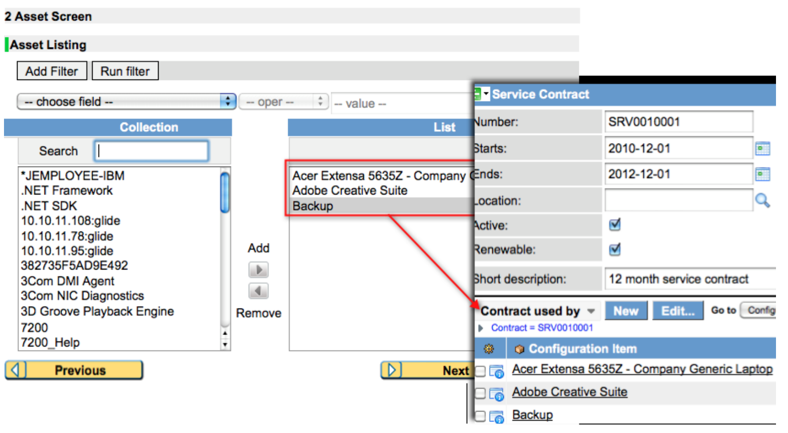
1. Open the wizard record and click **Test**.
2. Enter the following information and click **Next**.
   - **Associate assets?**: *No*
   - **Which type of contract?**: select a value other than the default
   - **Start Date**: enter a date
   - **End Date**: enter a date
   - **Enter short description for contract**: enter a description
3. Verify that a new record is created and the values match step 2.



Test without assets. Verify record information.

Test the wizard for a record with assets:

1. Open the wizard record and click **Test**.
2. Enter the following information and click **Next**.
   - **Associate assets?**: *Yes*
   - **Which type of contract?**: select a value other than the default
   - **Start Date**: enter a date
   - **End Date**: enter a date
   - **Enter short description for contract**: enter a description
3. Verify that the asset screen opens.
4. Select assets to add to the list and click **Next**.
5. Verify that a new record is created and the values match steps 2 and 4.



Test with assets. Verify record information.

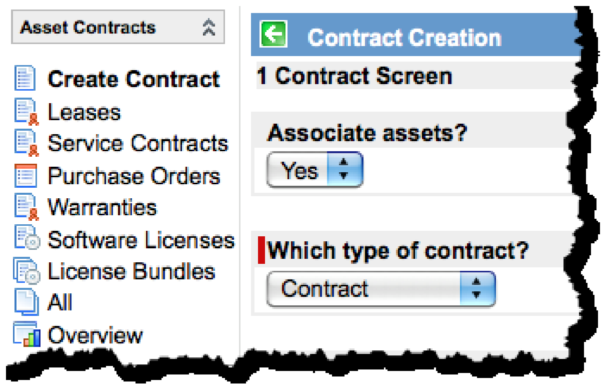
Step 6. Publish the Wizard

Restrict access to users with asset role:

1. Open the wizard.
2. In the **Roles** field, select *asset* and save the record.

Add the wizard as a module in the **Asset Contracts** application:

1. Open the wizard.
2. Copy the sys_id.
3. In the navigation pane, right-click **Asset Contracts** and select **Edit Application**.
4. In the **Modules** related list, click **New**.
5. Enter the following information and save the record.
   - **Title**: *Create Contract*
   - **Order**: *10*
   - **Link type**: *URL (from arguments)*
   - **Arguments**: */expert_shell.do?sysparm_sys_id*=<wizard sys_id from step 2>



Create Contract module

The wizard panel link does not return to the beginning by default. To return the wizard panel link to the beginning, add *&sysparm_initial=true* to the URL Arguments. For example, */nav_to.do?uri=expert_shell.do?sysparm_sys_id=<wizard sys_id>&sysparm_initial=true*.

Survey Wizards

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

Overview

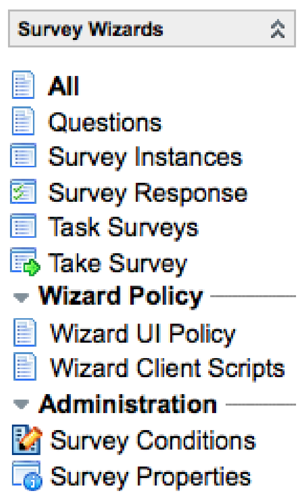
The Survey Wizard plugin creates surveys using wizards. Advantages versus other survey functionality include the ability to:

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

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

Application & Modules

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



Survey Wizard application

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

Requesting the Plugin

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

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

Click the plus to expand instructions for requesting a plugin.

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

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

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

Installed Components

New Fields

The following tables are modified:

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

New Tables

The following tables are added:

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

Script Include

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

Business Rule

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

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

Wizard Panel

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

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

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

Demo Data

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

Creating a Survey Wizard

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

Step 1. Create the Survey Wizard

Create the survey wizard:

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

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

Step 2. Define Questions

Define survey questions (wizard variables):

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

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

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

Step 3. Create Pages

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

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

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

Step 4. (Optional) Create Dynamic Effects

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

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

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

Step 5. Define Transitions

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

Define transitions:

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

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

Step 6. Test the Survey Wizard

Test the survey wizard:

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

Step 7. Configure the Survey

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

Note: *To learn more, see Surveys.*

References

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

Creating a Survey Wizard (Demo)

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

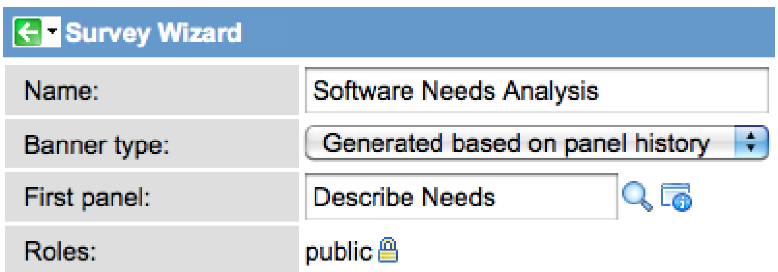
Overview

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

Step 1. Create the Survey Wizard

Create the survey wizard:

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



***Software Needs Analysis* survey wizard**

Step 2. Define Questions

Define survey questions (wizard variables):

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

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

-- Wizard Variables Details Table --

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

Step 3. Create Pages

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

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

-- Panel Variables Table --

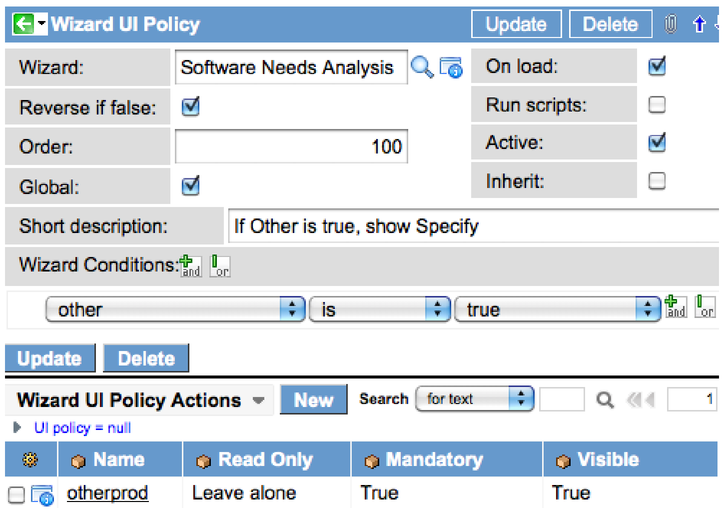
Name & Title	Description	Add variables
Describe Needs	Please complete this survey to help us evaluate our ongoing software needs.	Business software you use (select all that apply): Microsoft Office Suite Adobe Creative Suite Other Please specify:
Microsoft Office	Please rate the importance of each program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

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

Step 4. Create Dynamic Effects

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

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



Wizard UI Policy

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

Step 5. Define Transitions

Define transitions:

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

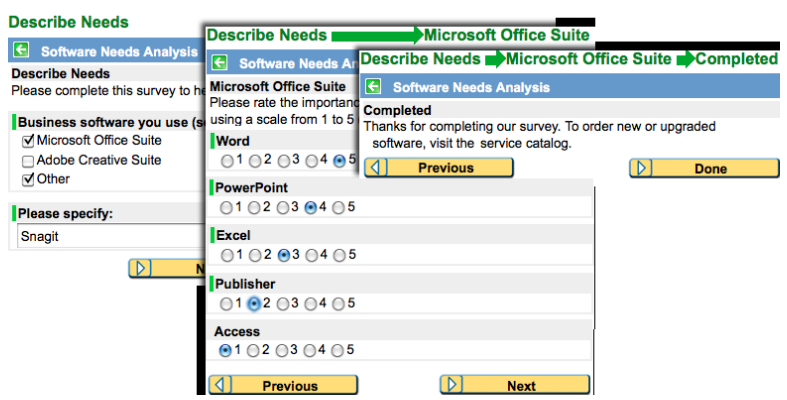
-- Panel Transition Details Table --

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

Step 6. Test the Survey Wizard

Test the survey wizard:

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



Test the Survey Wizard

Step 7. Configure the Survey

Configure the survey:

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

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

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

References

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

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