Lab Guide

A Fresh Approach to Surveys

Brett Baier & Tom Patterson

Default Login / Password: Knowledge17

admin / Knowledge17

itil / Knowledge17

employee / Knowledge17

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Lab Goals

Lab Overview

When you need input from the business, peers, or customers, the survey capabilities within ServiceNow can not only provide that data, but also provide relevance to tasks within the ServiceNow system.

The Lab focuses on 4 areas:

- Create a signature Survey Template to make creation of the survey itself quick and easy. These can be created in a specific style and for a specific purpose such as customer feedback or quality control.
- Create the Survey using the Survey Designer to quickly configure surveys in a simple, one-page form, adding introduction and farewell pages and any instructions along the way.
- Make the Survey easy to access via URLs that you can send as well as adding the survey widget to the Portal; Then test the Survey by taking it.
- Look at the reporting options and gather aggregated scoring.

Lab Goal

Lab 1
Survey Template

Making Templates is fun and useful! This lab explains how to provide an important template requested by management that is sure to drive adoption. The lab explores the following tasks:

- Find 5 images that show very bad, bad, ok, good, and very good.
- Add the images to an Image Scale
- Save as a Template

Create New Template

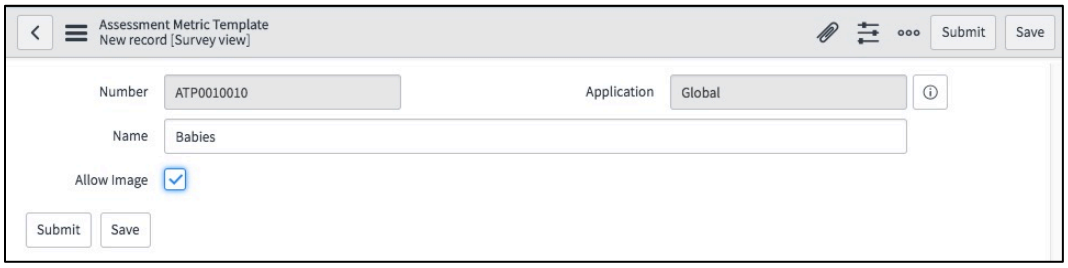
1. Navigate to **Survey > Templates** and click **New**.



2. Enter Name **Babies**.

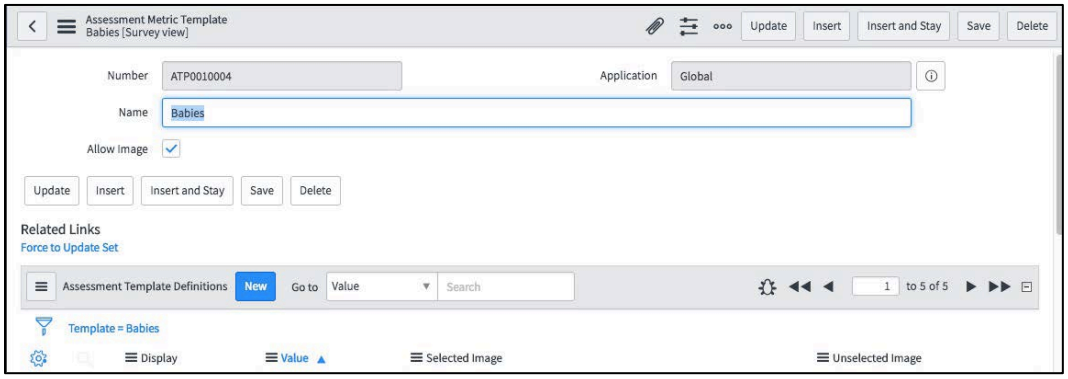
3. Select **Allow Images**.

4. Click **Save**.



Create Definitions

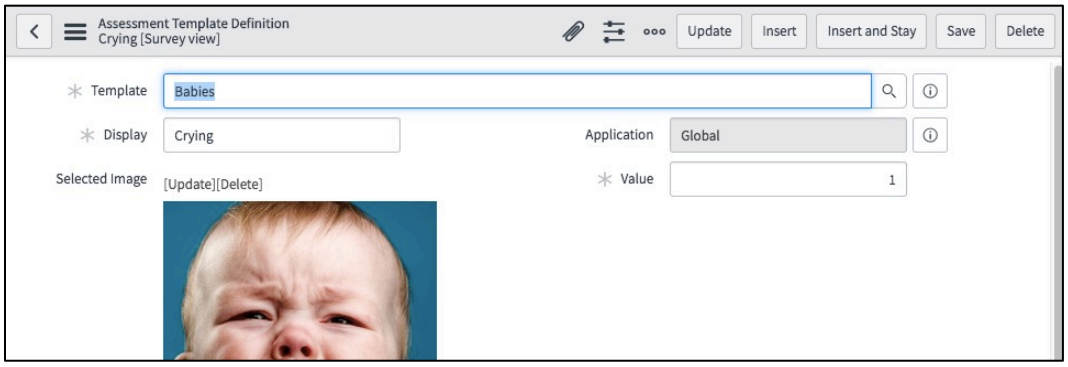
1. In the Assessment Template Definitions related list (section towards bottom of page), click **New**.



2. Enter Display **Crying**.

3. Enter Value **1**.

4. For Selected Image click **update** then choose **baby_1** picture from your desktop.



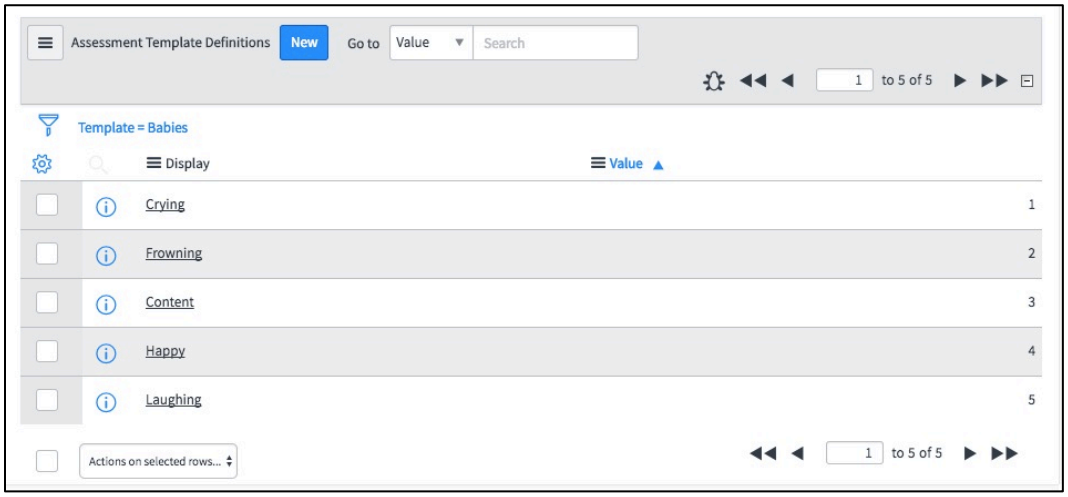
5. Click **Update.**

Add the Other Definitions

1. In the Assessment Template Definitions related list, repeat for each of these definitions:

Name	Value	Picture
Frowning	2	baby_2
Content	3	baby_3
Happy	4	baby_4
Laughing	5	baby_5

2. The result should look like the example.



Lab Goal

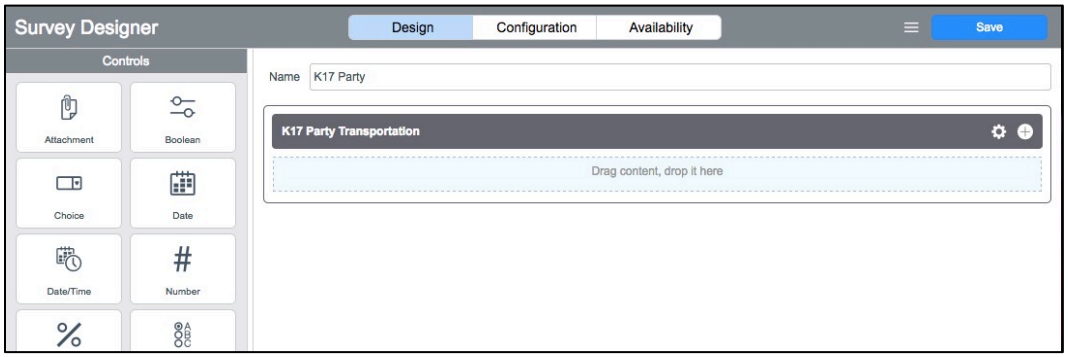
Lab 2
Create Survey

This lab explains how to use the Survey Designer by completing the following task:

- Create a survey with the Template and other tools.

Create Survey

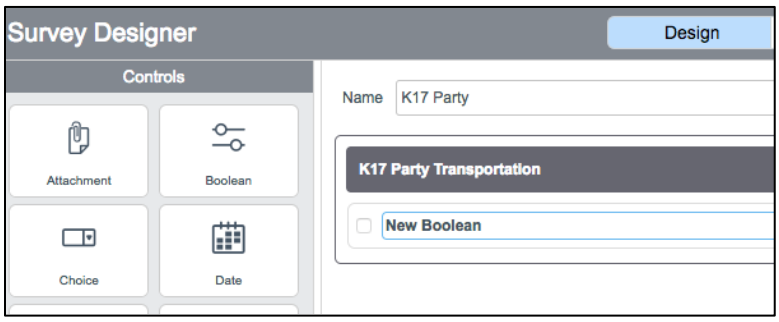
1. Navigate to **Survey > Survey Designer**.
2. Give the Survey a name: **K17 Party**.
3. Also name the New Survey Category **K17 Party Transportation**.



Note: These categories are important in the reporting lab.

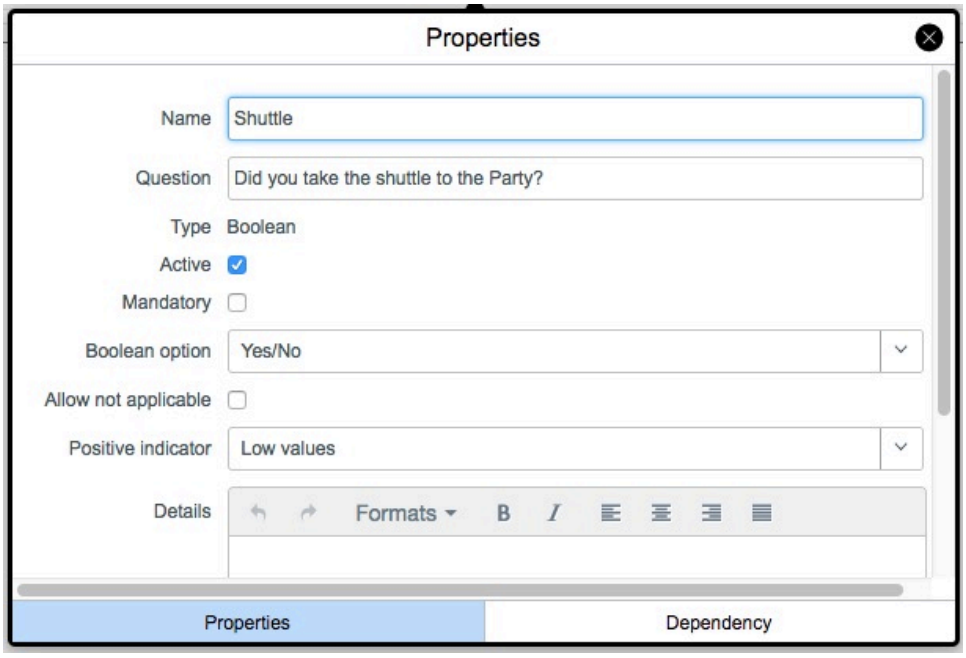
Create Questions

1. Drag the **Boolean** control from the Controls Pallet on the left onto the blue section of the Design Canvas on the right.



2. Click the **gear** in the right corner of the **New Boolean** question. 

3. Fill in the Properties for the New Question as in the example below.
Note: There is no SAVE button. Configuration changes are saved when you close the dialog box.



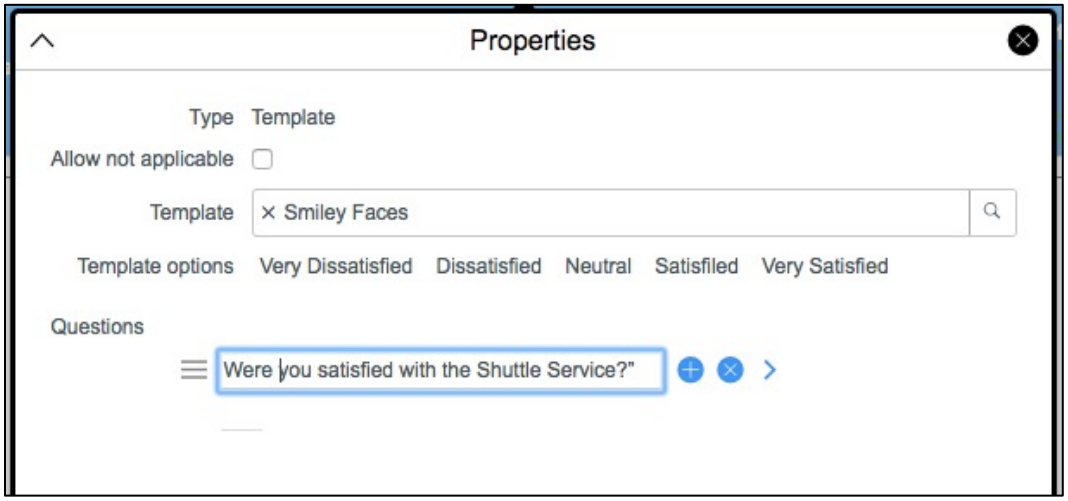
4. Next, bring over a template. Drag this below the shuttle question and choose the **Gear** icon to configure.



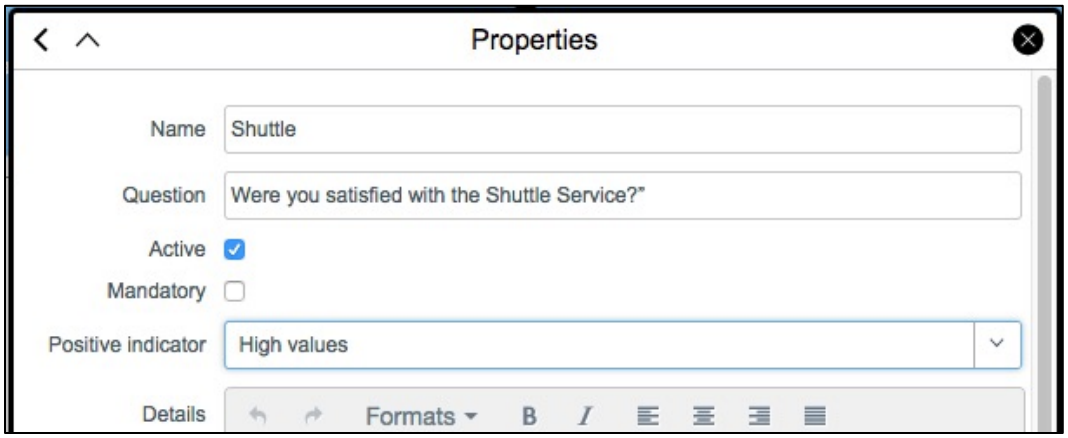
5. Select the **Template** magnifying glass and choose template **Smiley Faces**.

6. Type your question **Were you satisfied with the Shuttle Service?** over Question **1** in Questions.

7. Select the greater than (**>**) sign at the end of your Question.

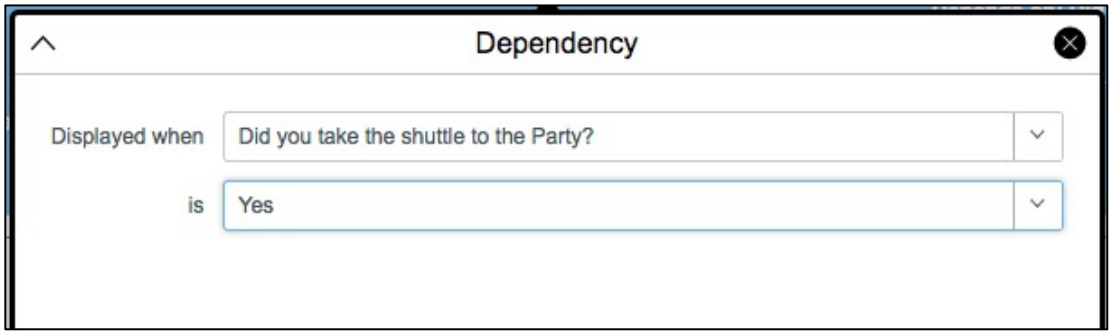


8. Set Name **Shuttle** and change the indicator to High Values.



NOTE: You only want to ask guests about the shuttle experience if they actually rode the shuttle; therefore, only show this question if the **Took Shuttle** question is checked.

9. Select the Dependency tab at the bottom of the window. Choose the question **Did you take the shuttle to the Party?** And set **is** to **Yes**.



Create a New Category

This category is **Food and Entertainment** at the party.

1. Click the plus (**+**) on the K17 Party Transportation category. 

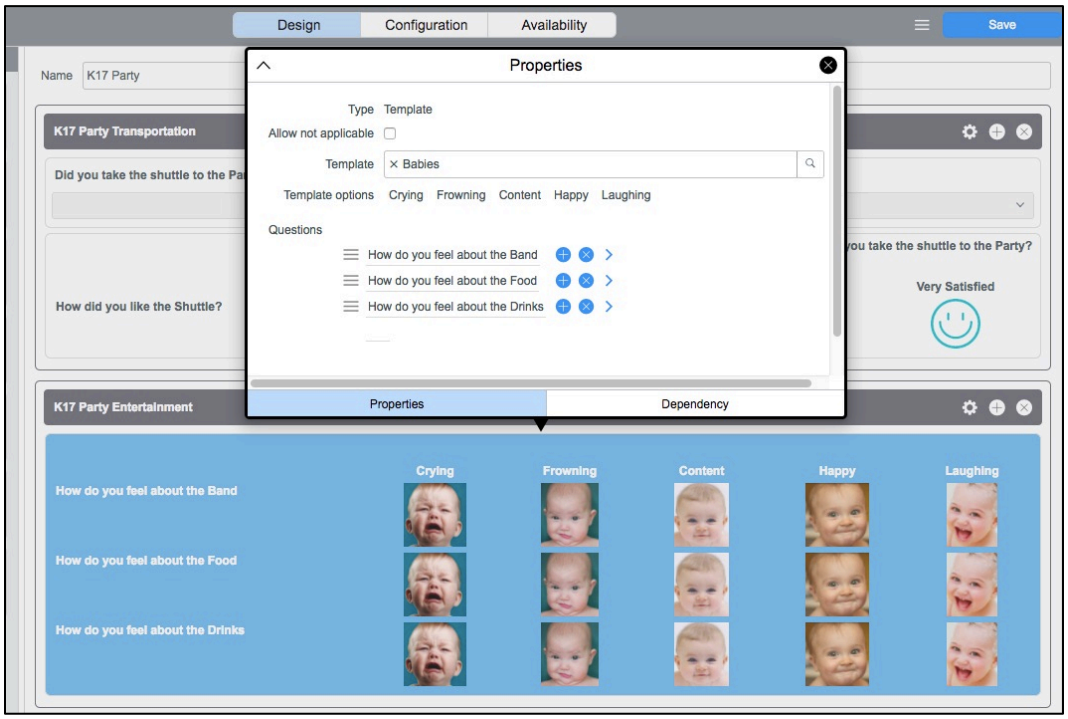
2. Name the new Category **K17 Party Food and Entertainment**.



Add the Custom Template

1. Drag the template control to the K17 Survey under the new K17 Party Food and Entertainment category and then click the gear to the right. Under the properties select **Babies.** (**Note:** If you did not do the Lab 1 just choose Smiley Faces.)

2. Under the questions area, add the questions listed in the screenshot. You can tab, or optionally click under your previous question, to get to the next line.

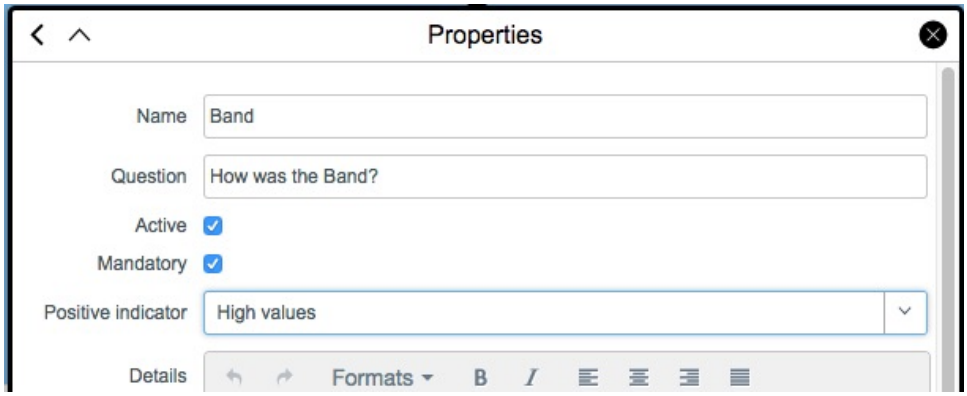


3. Select the **Property** arrow **>** (greater than sign at the end of your question)

4. Ensure that each question has a name. This is typically a short name for metric gathering. So instead of using “Please enter your mobile number,” the name field may just be **Mobile**. In this case, the question fields are appropriate for the name as well. Use **Band**, **Food**, and **Drinks**, respectively.

5. **High values** is selected for the positive indicator. This helps the survey interpret the value you want to achieve in Scoring.

6. Make these questions mandatory.

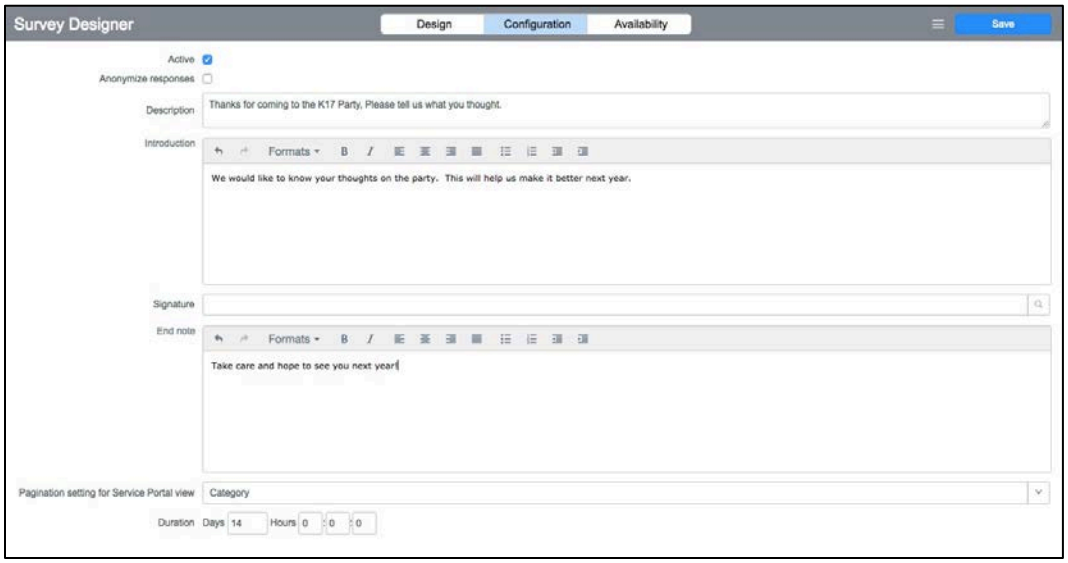


7. Use the **<** in the form to move back to update the next question. The **x** gives an error stating that you have not finished setting the other questions.

Survey Configuration

1. On the main page of survey Designer are three tabs. You are currently in **Design** tab. Click the **Configuration** tab and complete the information listed.

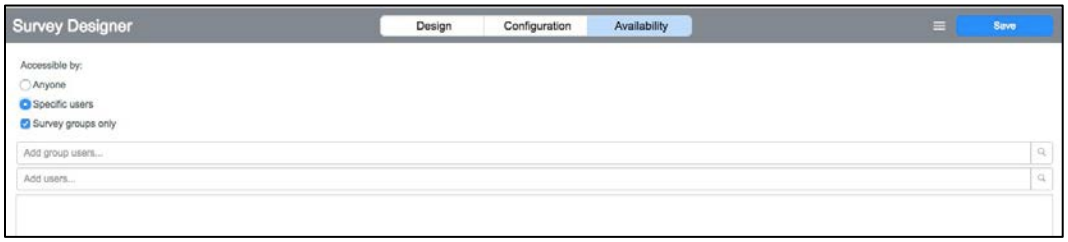
Active:	**True**
Anonymize responses:	Not checked. - *this removes the user name reference from results*
Description:	Post K17 Party Survey.
Introduction:	Thank you for attending Knowledge17. We would like to know your thoughts on our party. This will help make it even better next year.
Signature:	*Leave this blank, but could be used if you need the survey taker to acknowledge a legal statement before taking the survey.*
End note:	Take care and we hope to see you next year.
Pagination setting for service portal view	This will how the next and previous function works. This can be set per question or per category on the survey. This is helpful on long surveys to prevent excessive scrolling.
Duration:	days – *this expires the survey if not taken in a reasonable timeframe.*



Permissions for the Survey

Now decide who can take the survey.

1. Select the **Availability** tab at the top of the Survey Designer.
2. Click **Specific users** to see that this can be limited to specific groups or users.



3. Click **Anyone**.
4. The final step is to **Publish** the survey.

5. In the top corner of the survey designer Click **Save and Publish.**



6. Even after saving or publishing, you can make modifications to general settings such as anonymity, active status, introduction, end notes and such. Even the survey questions and response options can be changed after it is published, with the following caveats:
   - Added questions are available only on surveys that are distributed after this change.
   - Changes to existing questions are immediately available to users before the survey is submitted or during the retake period. This includes changes to the answers, such as additional choices or changes to the data type.
   - Deleted questions are also deleted from the distributed surveys still in users' queues.

7. ServiceNow automatically created the metrics for you during publishing. These metrics are in categories. The same categories you set up while creating the questions. Your questions will now be tracked as **Metrics** named after your survey name. You learn more about **Categories**, **Metrics**, and **reporting** later.

Lab Goal

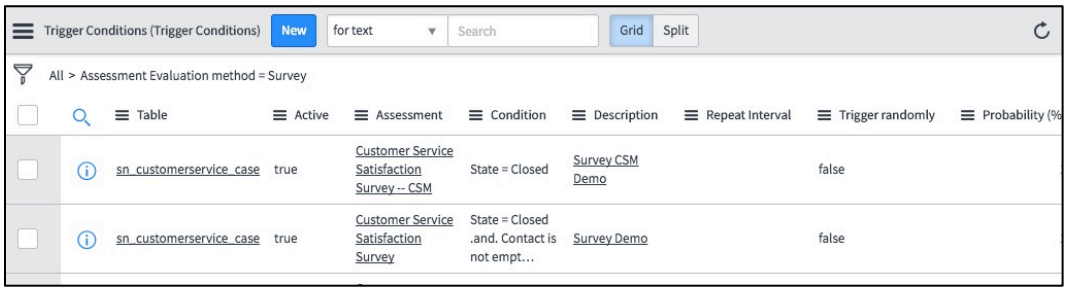
Lab 3
Trigger Survey

This lab explains how to trigger a survey from a condition on a record and show taking the survey. The lab explores the following tasks:

- Create a Trigger for a Survey
- Take the survey from the Portal

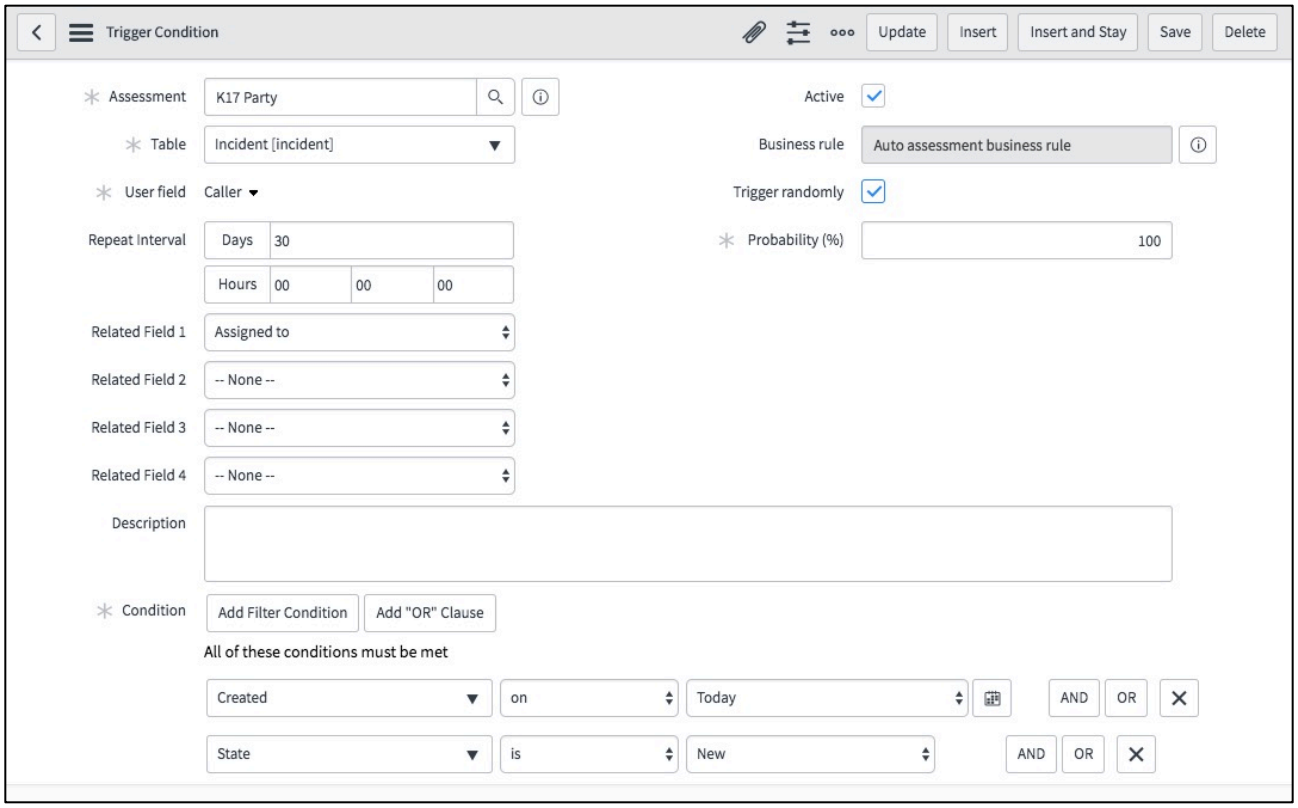
Create Trigger for Survey

1. Navigate to **Survey > Triggers Conditions** and click **New.**



2. Set Assessment to **K17 Party**, Table **Incident,** User Field to **Caller**.

3. Set condition to **Created is Today** and **Status is New**.



4. Click **Submit**.

5. Navigate to **Incident > Create Incident**.

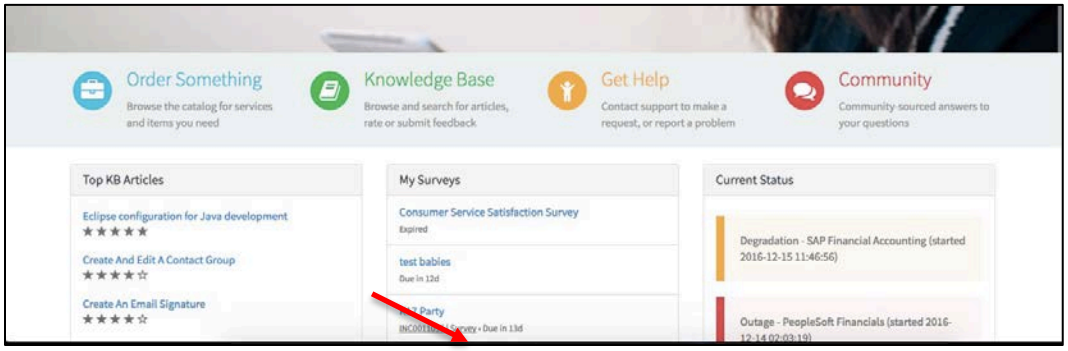
6. Set Caller to **System Administrator** and Short description to **Survey**.

7. Click **Update**.

Take the Survey

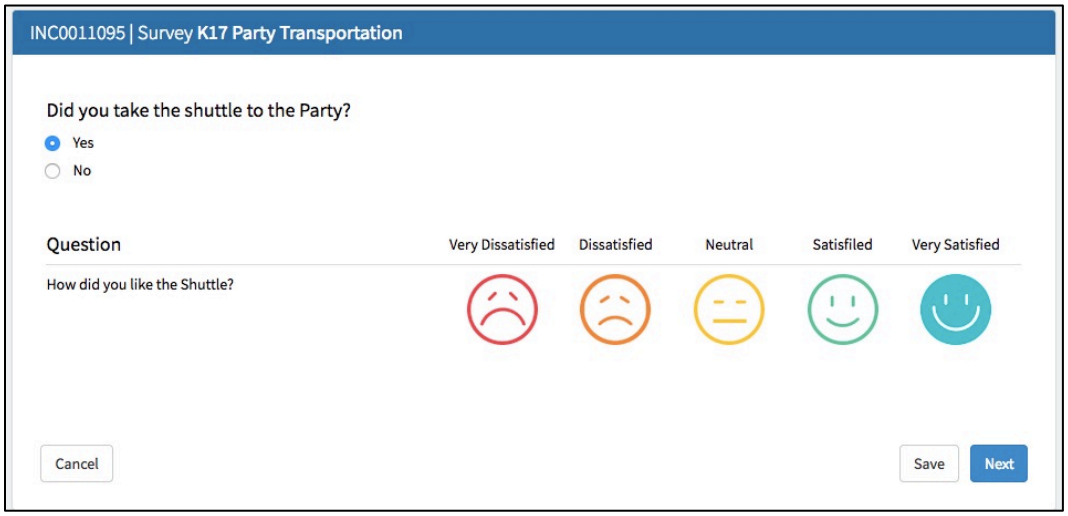
1. Navigate to **Self-Service** > **Self Service Portal**.

2. Click the survey for **K17 Party** in the Survey list under My Surveys in the lower Middle of the screen.

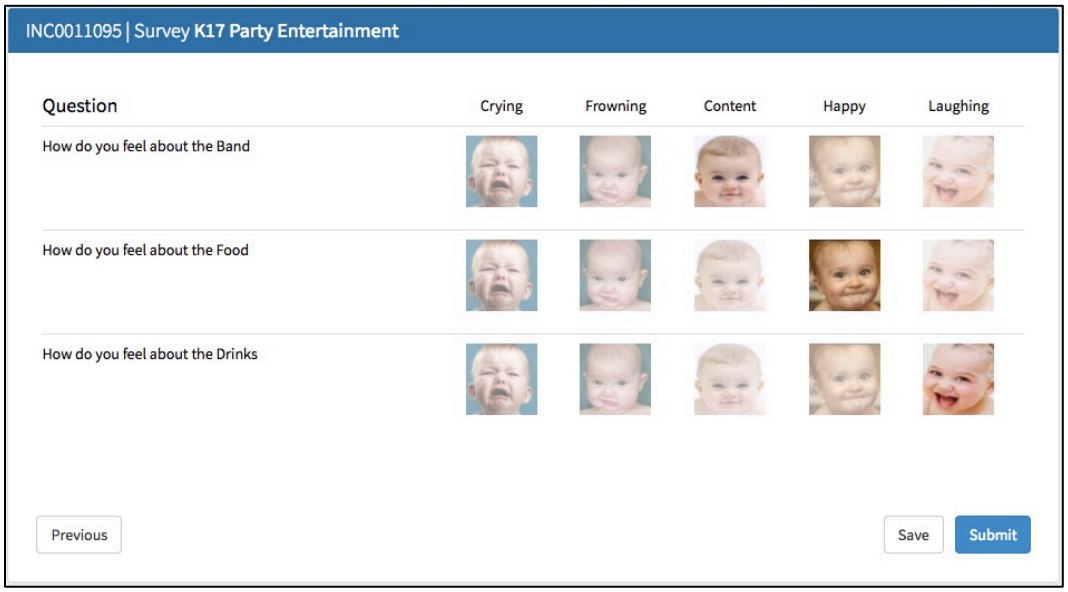


3. Click **Get Started** on the splash page to start the Survey.

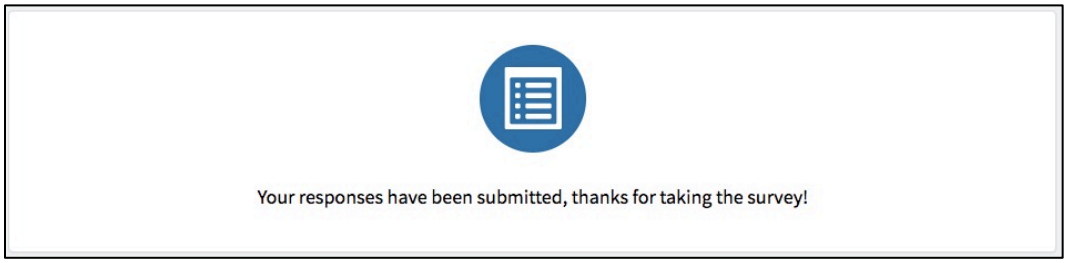
4. Select **Yes** and then answer Second question that showed up conditionally. Click **Next**.



5. Select the babies you want and click **Submit**.



6. A Message shows that was configured in the Survey.



Lab Goal

Lab 4
Reporting

One of the most important things about the survey process is reporting.

Why do this work if you cannot gain knowledge from your participants?

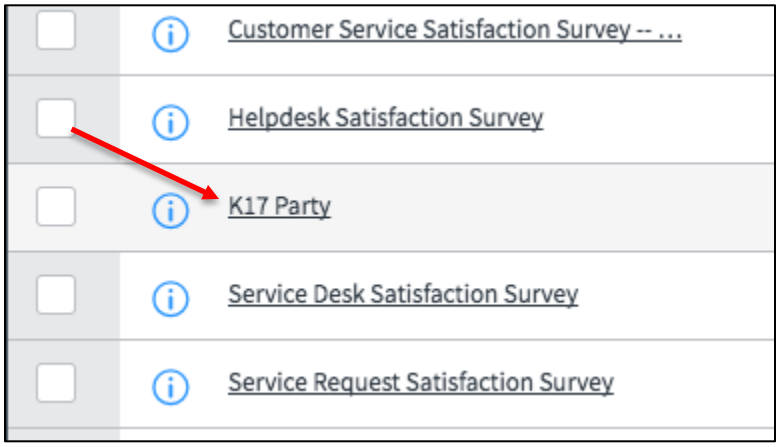
While creating your survey ServiceNow created metrics tables for you in the background. We can leverage these metrics, to view pre-made score cards and create our own reports and dashboards.

Start by doing the following:

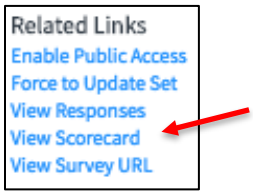
- View pre-canned scorecards
- Locate metrics table and metric options.
- Create a report with scores for the survey.

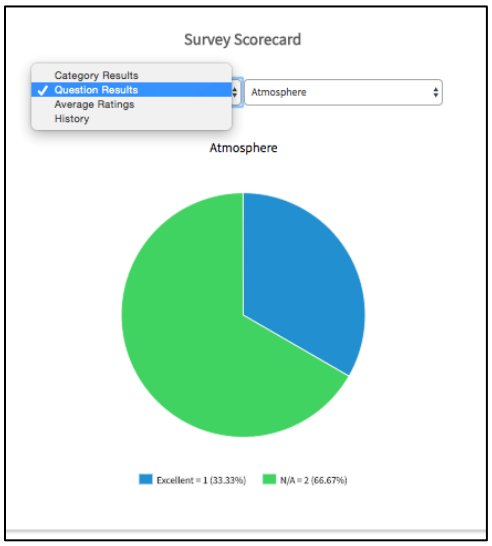
View Pre-canned Scorecards

1. Navigate **to Survey Management > View Surveys**. Select **K17 Party**.

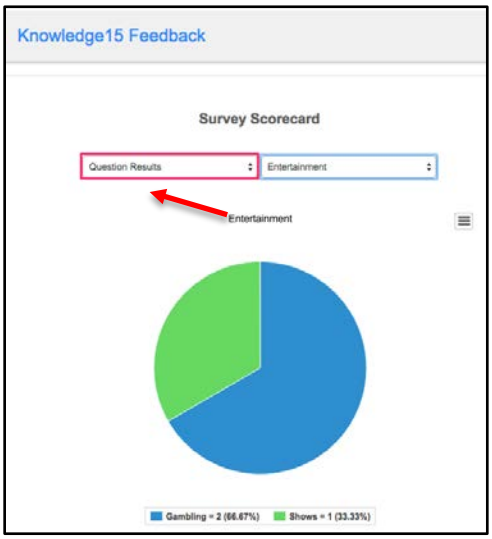


2. Scroll to the bottom of the **K17 Party** Survey Definition form to see two new **Related Links**. Since you now have some submitted survey results, you can view them on a Scorecard or just view the raw results. Click **View Scorecard**.

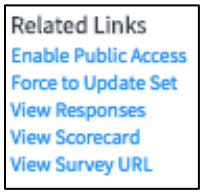




3. Switch from **Category Results** to **Question Results** to view the details on an individual question.

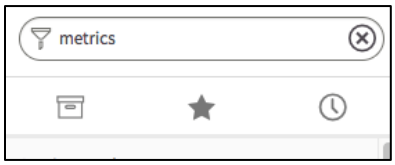


Even though the survey was targeted to a specific set of users, you can also take it directly from the URL. This can be useful for sending out the survey to users via email or to post the survey on a CMS page or other website.

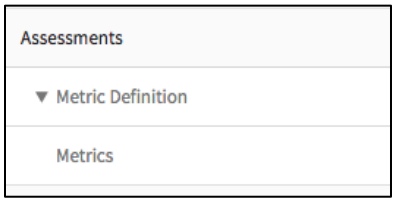


Locate Metrics Table and Metric Options

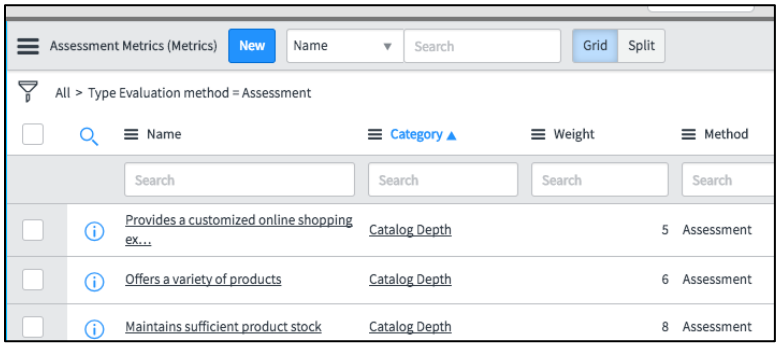
1. In the Navigation panel type **Metric**.



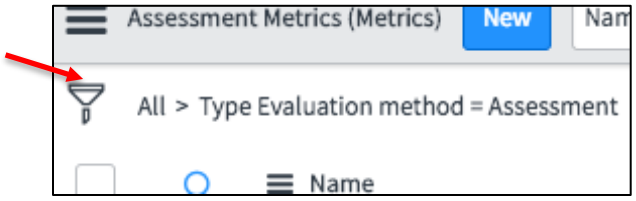
2. Locate Metrics by navigating to **Assessments > Metric Definition > Metrics**.



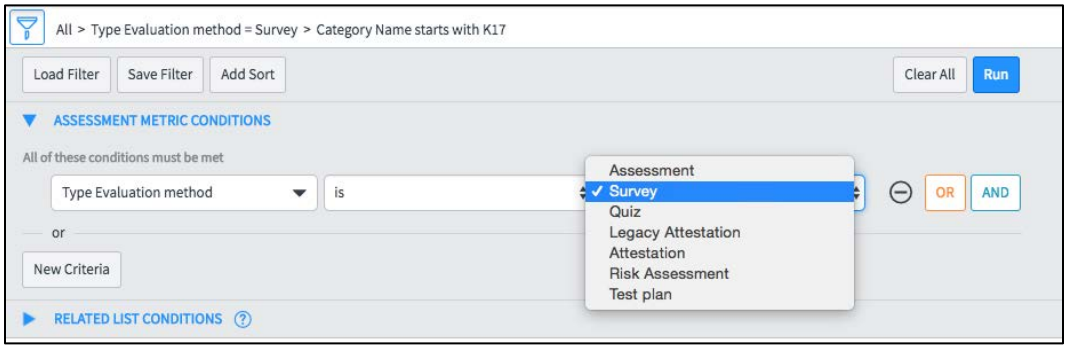
3. The filter is set to show only assessments, but you want to see surveys. Change the filter.



4. Click the filter icon.



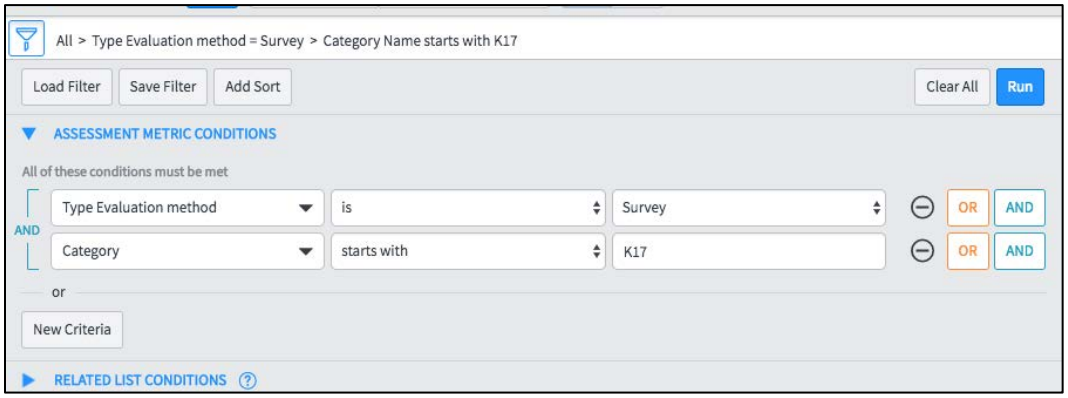
5. Change the current selection from Assessment to **Survey**.



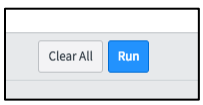
6. Add one extra filter: Select and choose the **Category** field.

7. Select **starts with** in the Condition Operator field.

8. Type **K17** as the field data.

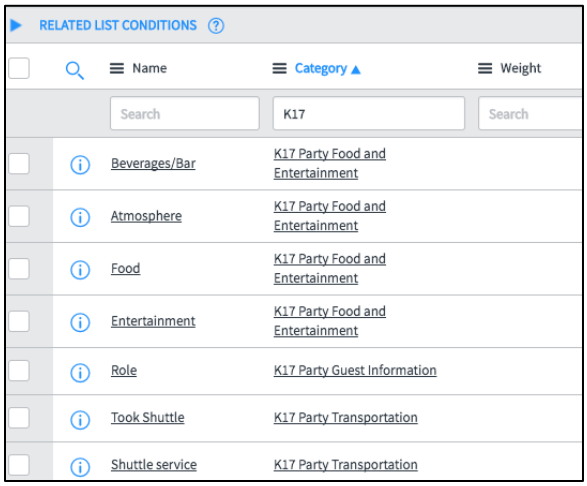


9. Click **Run** at the top right.



You now see each question from the survey.

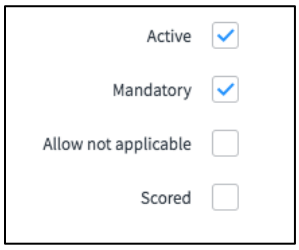
10. These metrics can be manipulated to represent the scoring criteria you want.



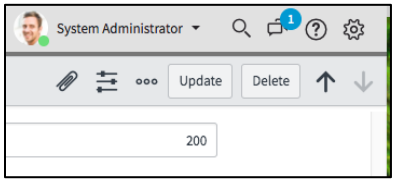
11. Under Name, select **Took Shuttle**.
    View a few more options for the questions:

    Weight –represents question importance in relation to the other questions.
    Scored –Allows you to choose whether the questions are scored in the overall metric score.

12. Since you do not want to include scoring on the question **take the shuttle**, deselect score on this question.



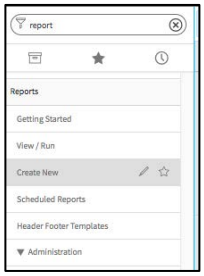
13. Select **Update** at the top-right corner.



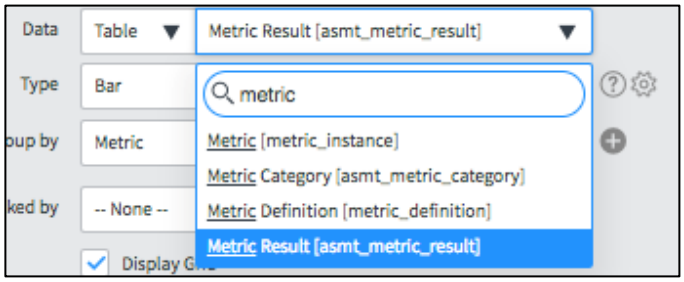
You see that there are some options to help adjust scoring so that it is accurate and intentional with areas of importance weighted higher and informational questions or comments sections not included in the scoring.

Create Report with Scores for the Survey

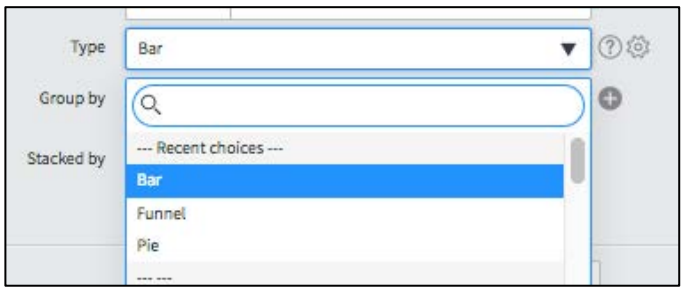
1. In the navigation filter, type **report**.
2. Select create **New**.



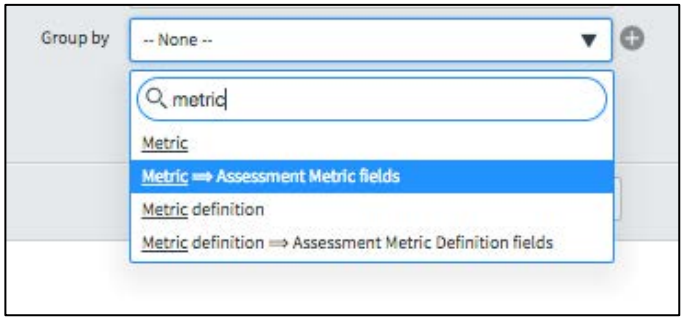
3. For the report name, type **K17 Party Survey results**.
4. In the table field type **Metric**. Select **metric result**.



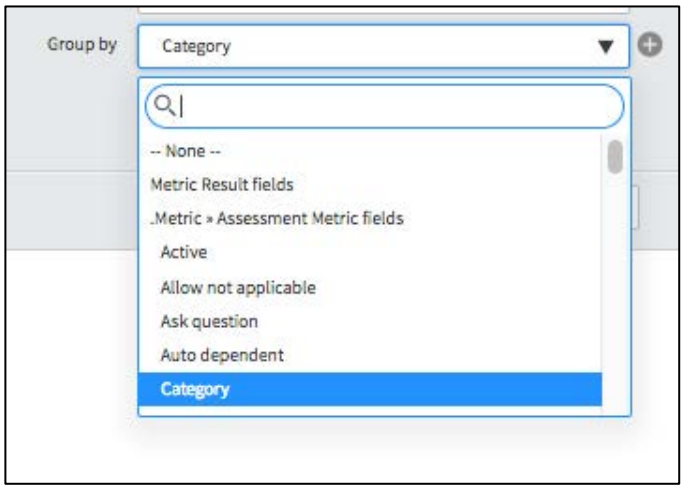
5. In the Type field, select **Bar**.



6. Select **Group by Metric > Assessment Metric Definition field**. This is where the metric categories are listed.



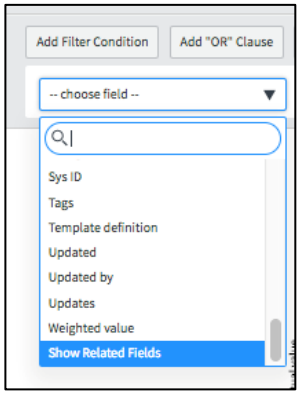
7. Now here is the trick: Select the **Group by** field a second time to see additional selections.



8. Select **Display** grid.

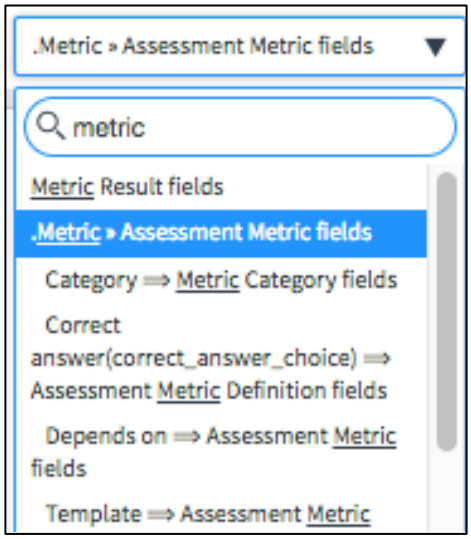
9. For **Aggregation**, choose average.

10. Filter for the report. First you need to see some related fields again. To do this in the report filter, scroll to the bottom of the selections and choose **Show Related Fields**.

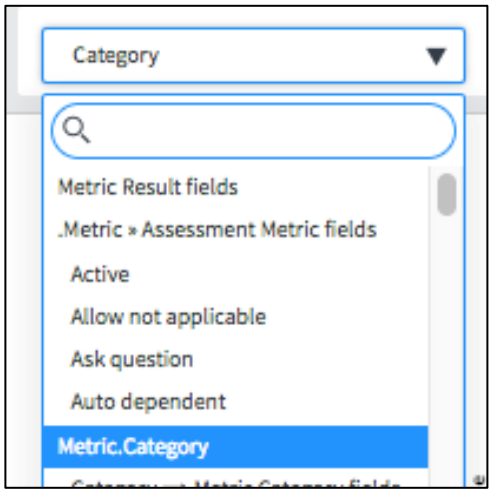


11. Now when you select the drop-down menu a second time you see additional fields.

12. Type metric and choose **Assessment Metric field**.



13. Choose the field a third time to see the category listed.

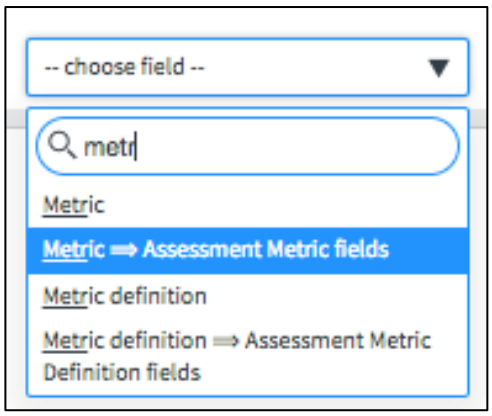


14. Select **starts with** and type **K17**.

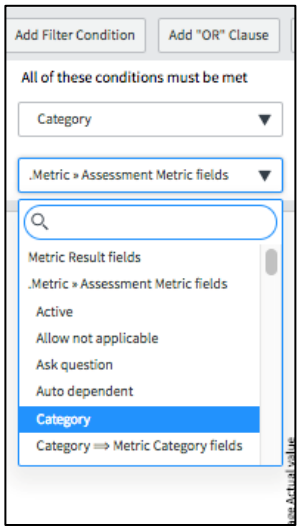


15. Click the **And** button to add an addition to the filters.

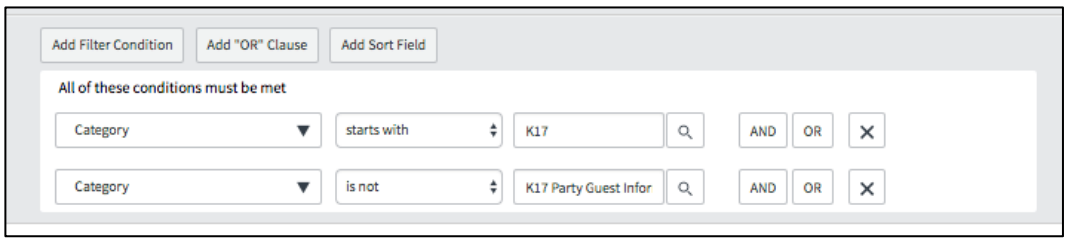
16. Type **metric** a second time and select **Assessment Metrics Fields**.



17. Choose it a second time and select category.



18. Now exclude the guest Information from the report. Select **is not** and choose **K17 Party Guest Information**.



19. Select **Run**.

