knowledge14®

April 27–May 1, 2014 • Moscone Center • San Francisco, CA

Lab Guide

Surveys & Assessments

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Lab instance: https://<<name>>.lab.service-now.com

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Lab Goal

Lab 1
Create Survey

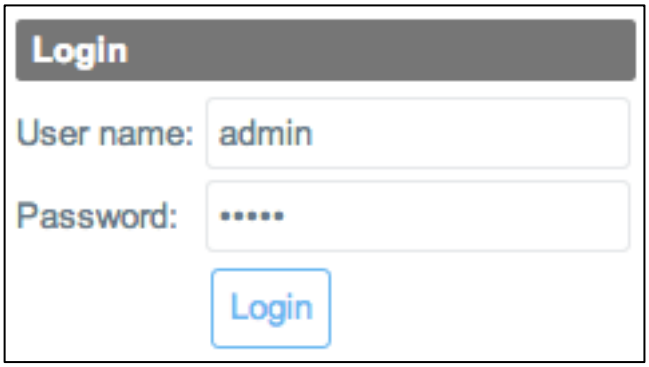
When your need for input from the business exceeds the level of detail available in the ServiceNow Survey application, enhanced capabilities are now available in the Service Now Assessment engine. This lab teaches you how to leverage survey-based inputs to collect metrics from a broad base of stakeholders across your organization. You will establish metrics, group them into categories, and set weights for each response. Stakeholders will be identified and tied to appropriate assessments. Once responses have been collected, you will format decision matrices and plot the collected data to report findings.

Lab 1 focuses on the Survey creator, quickly configuring surveys in a simple, one-page form.

Log on to Your Training Instance

1. Your instance URL is on the cover page.

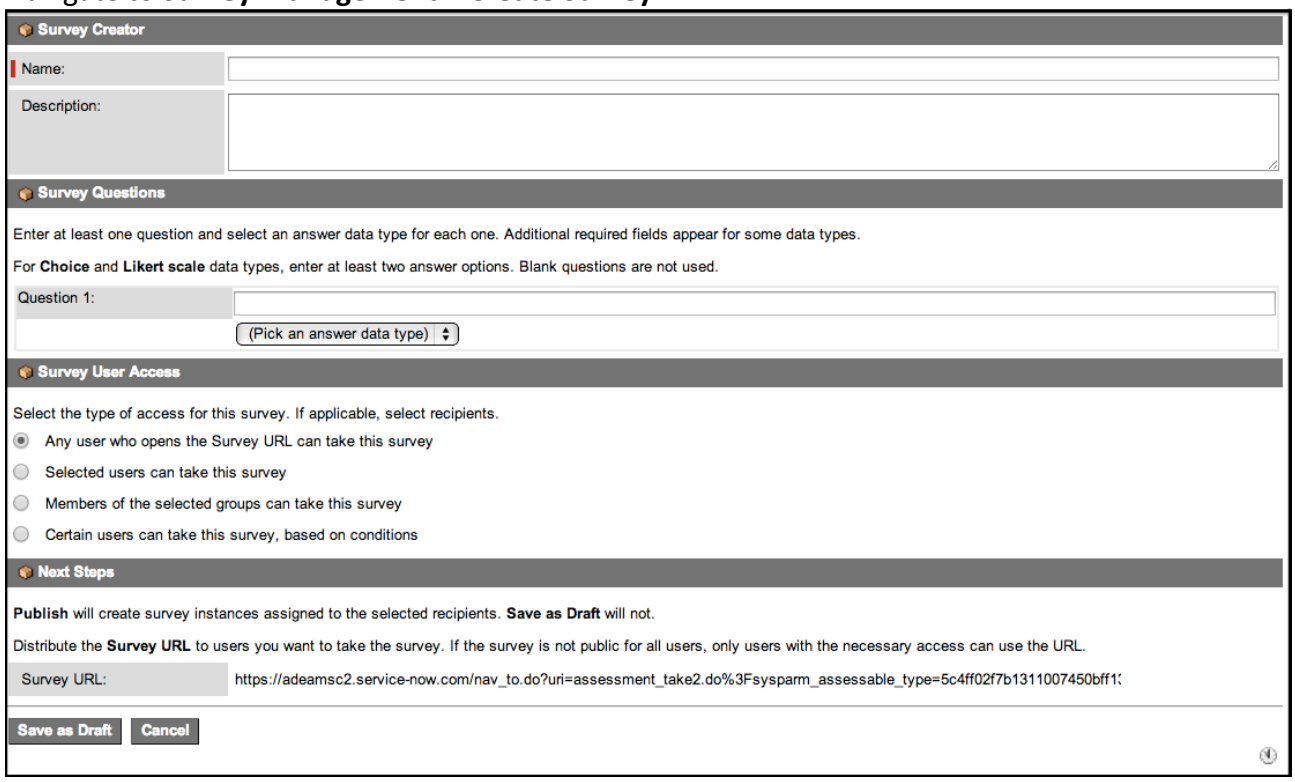
2. Login using the **admin** credentials provided on the cover.



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Create a new survey

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



The survey creator consolidates the configuration of your surveys into a simple, easy-to-use form that minimizes complexity and allows you to create and distribute your surveys quickly. Key sections are:

- **Name** – the name and description of your survey
- **Survey Questions** – the content in your survey
- **Survey User Access** – who will be able to take your survey

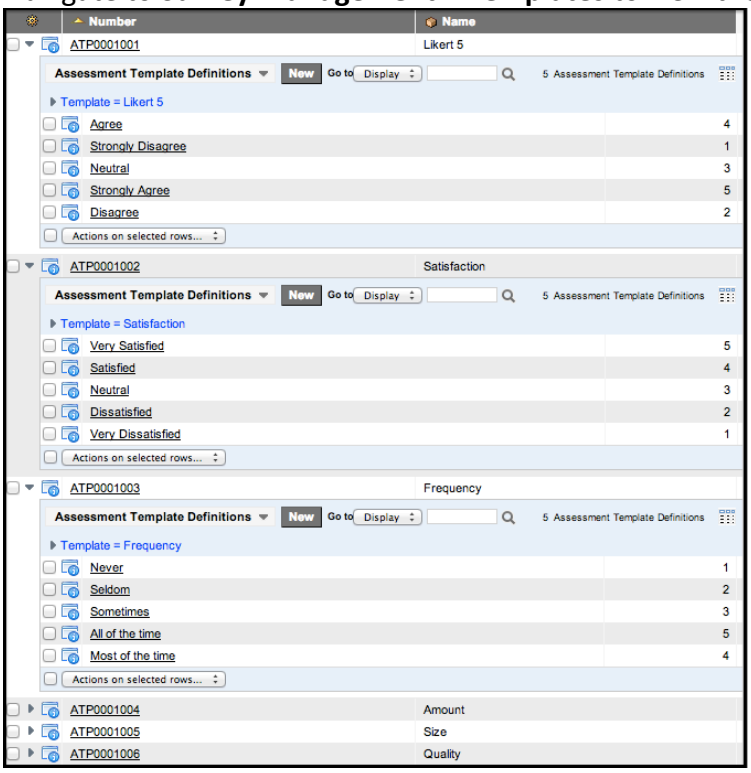
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There are a number of different response types available for your questions.

- **Checkbox**
- **Choice**
- **Date**
- **Date/Time**
- **Likert Scale**
- **Number**
- **Percentage**
- **String (text)**
- **Template**
- **Yes/No (Boolean)**

There is also an option to leverage response templates. If you're using the same set of responses for multiple questions, such as level of agreement (Likert 5) or satisfaction, create them once and save as a template to more quickly create your surveys.

Navigate to **Survey Management > Templates** to view the sample templates.



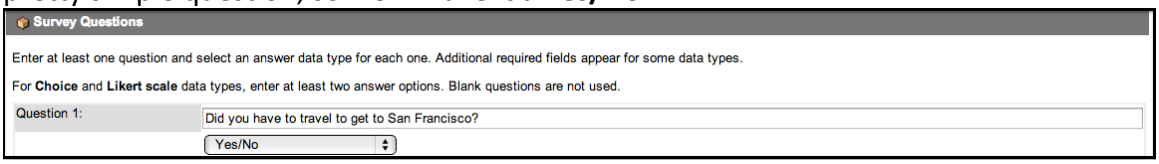
Let's jump right in and create our first survey!

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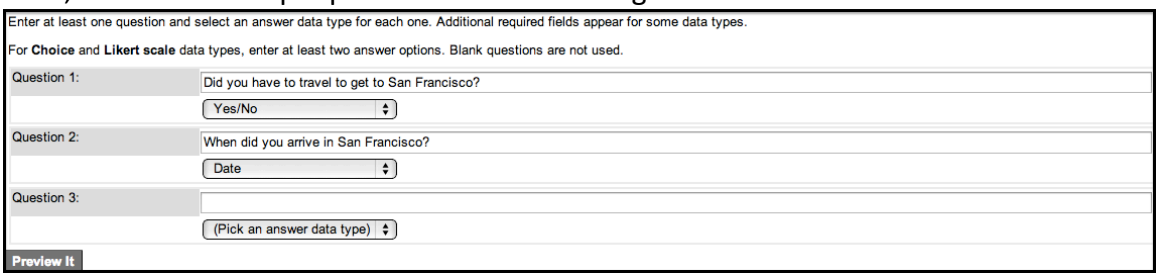
Using the Survey Creator

In our example, we'll be collecting feedback on the ServiceNow Knowledge14 conference. We'll title our survey **Knowledge14 Feedback**.

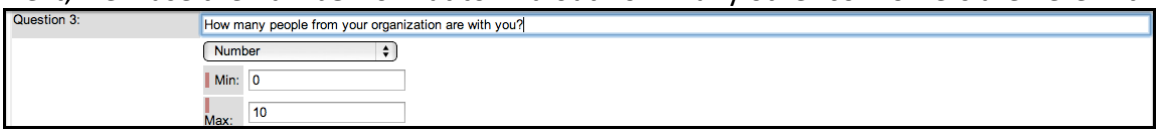
1. Let's start with a simple question, **"Did you have to travel to get to San Francisco?"**. This is a pretty simple question, so we'll make it a **Yes/No**.



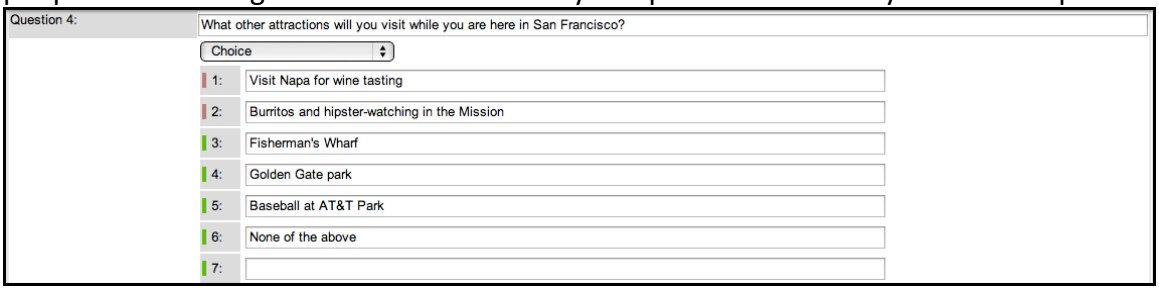
2. Next, we'll see when people arrived. Let's leverage the **Date** format.



3. Next, we'll use the **number** format to find out how many other co-workers are here with you.



4. Now for something a little more fun – let's use the **choice** format to find out what other things people will be doing in San Francisco. Enter your question and then your choice options below.



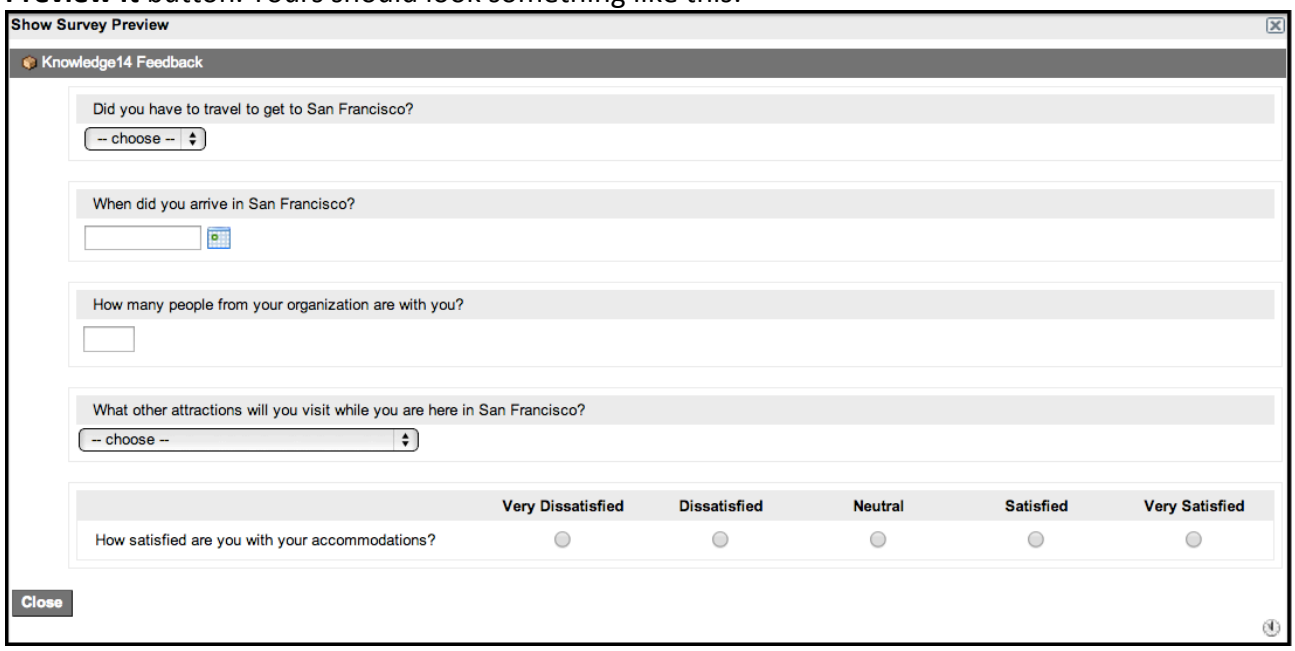
5. Remember templates? Let's use the **satisfaction** template to find out about the accommodations.



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Lab Success Verification

1. Keep going if you're feeling creative, but let's have a peek at our progress by hitting the **Preview It** button. Yours should look something like this:



2. Close the Preview.

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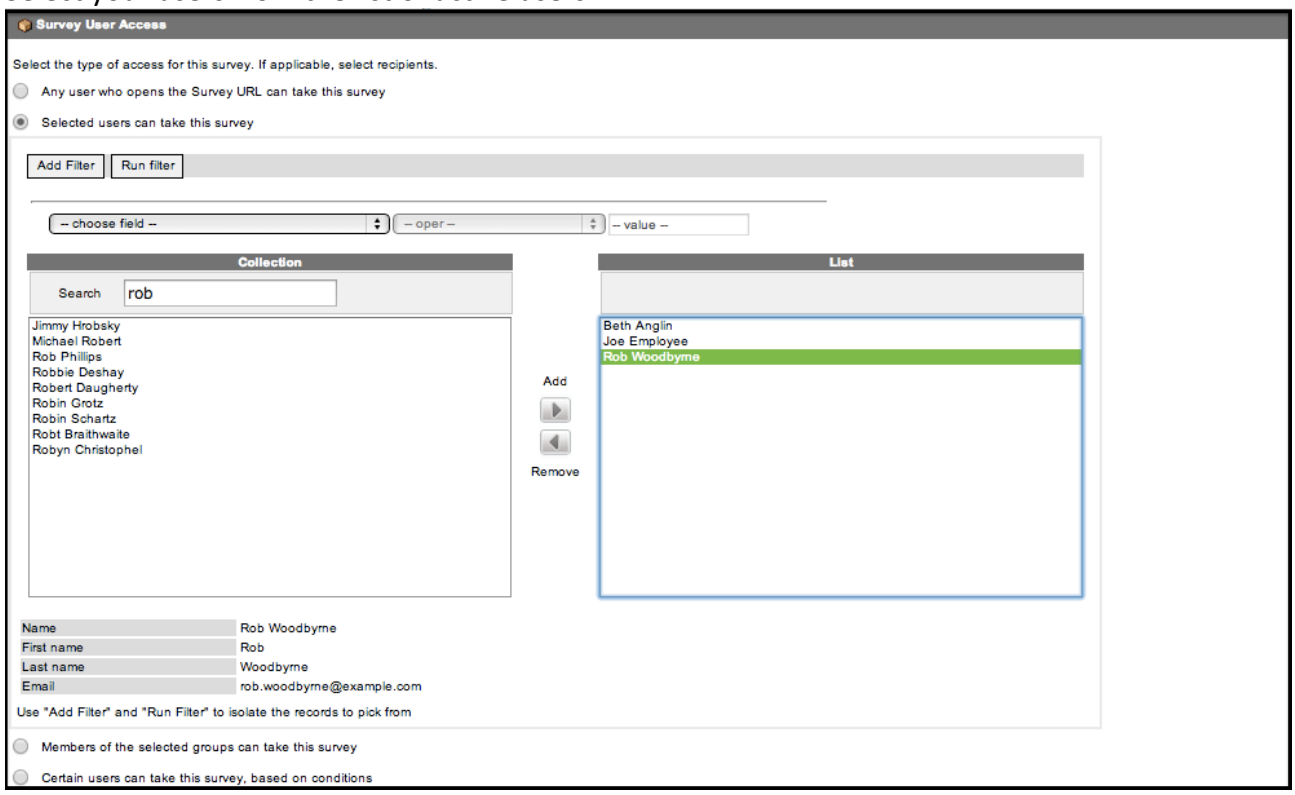
Control Survey Access

Under the **Survey User Access** section, we can control who will be able to respond to a survey and when. A survey can be open, defined for specific users or groups, or even be triggered based on conditions.

In this case, we'll keep it simple for now and make our survey available to **Joe Employee, Beth Anglin,** and **Rob Woodbyrne.**

1. Under the **Survey User Access** section, select **Selected users can take this survey**.

2. Select your users from the list of active users.

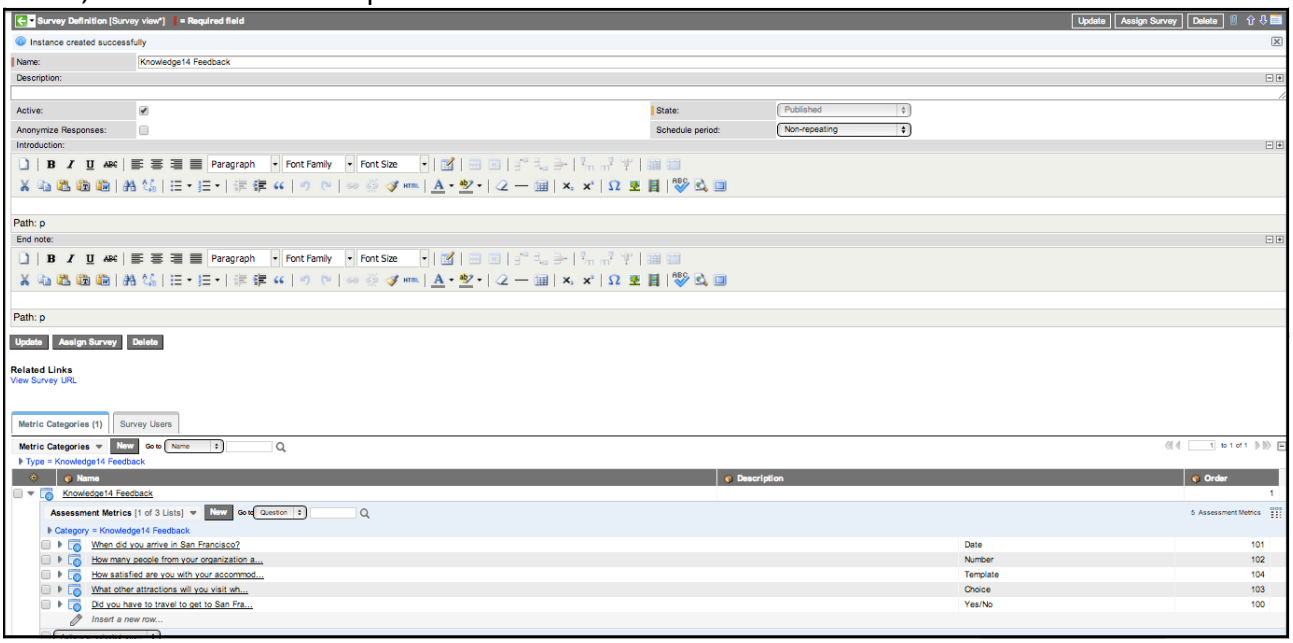


Once everything is set up, all you need to do is publish your survey. Your survey's **URL** is also displayed at the bottom of the form.

3. Click **Publish.**

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Notice that when you publish your survey, the system will take you to a list of all available surveys. After saving or publishing, you can make modifications to general settings such as anonymity, active status, and limitations on repetition.

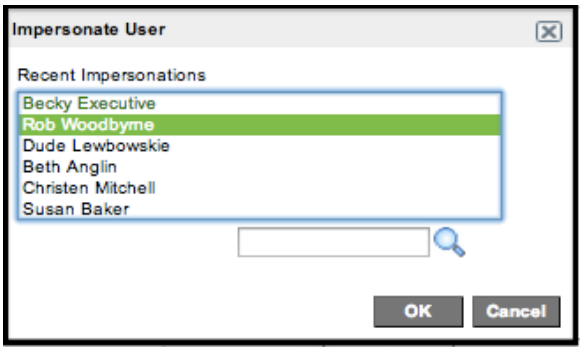


Your questions have been grouped into **metric categories** and each question is now tracked as a **metric**. You can make modifications to your categories and questions here. To learn more about **Categories**, **Metrics**, and much more, see part 2 of this lab!

Taking your survey

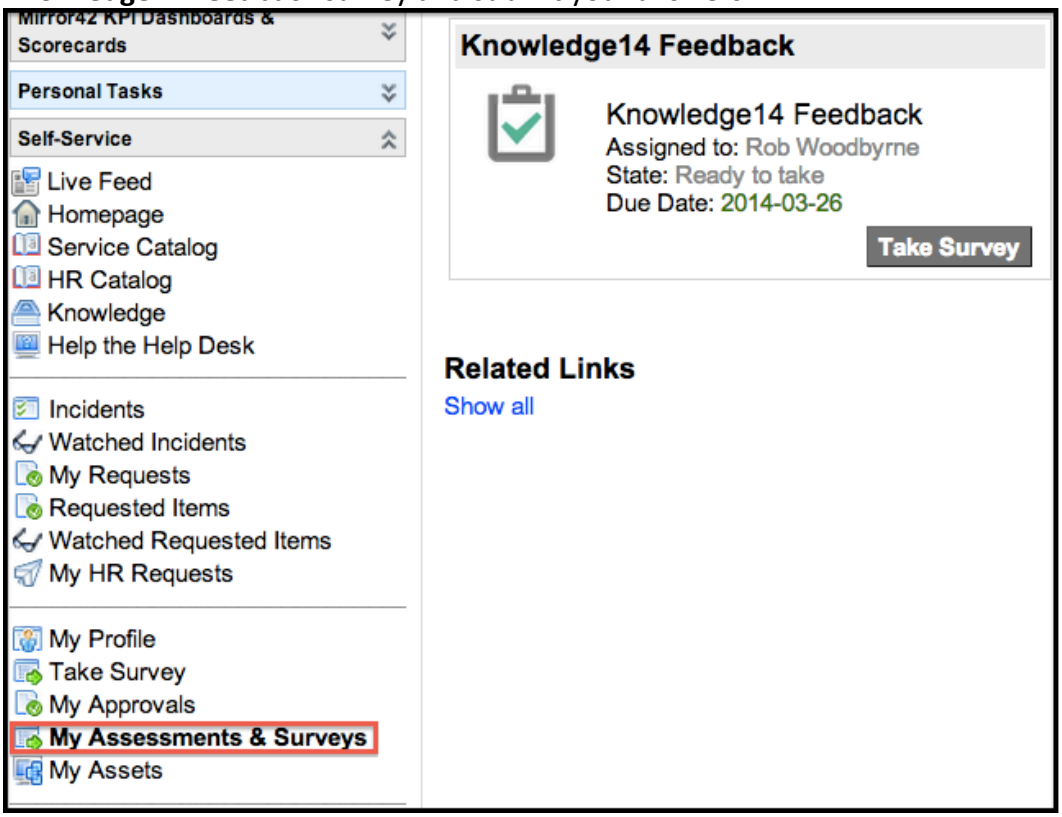
1. Impersonate one of your survey responders (Rob, Beth, or Joe) by clicking on the **Impersonate** icon in the upper left corner of your screen.





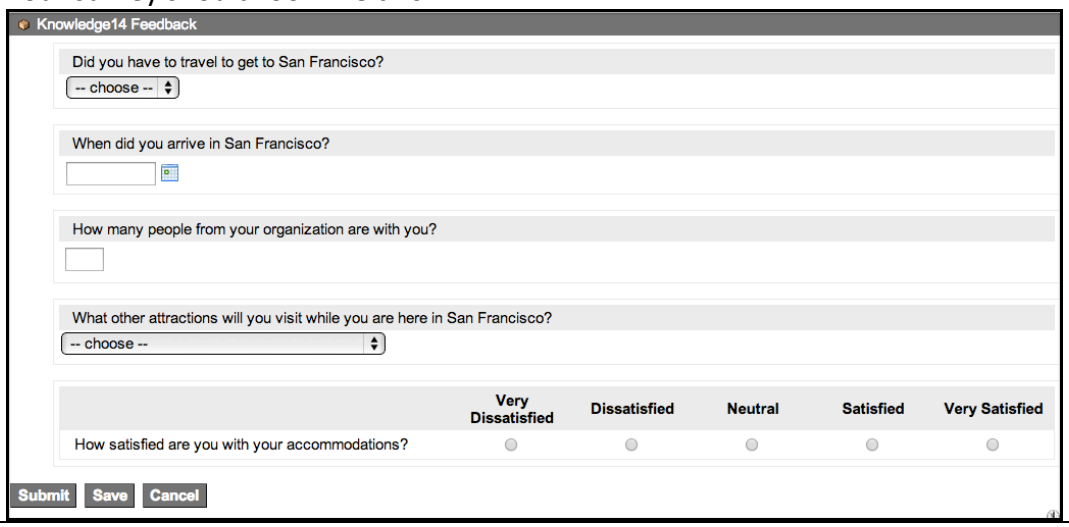
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2. Under **Self-Service > My Assessments & Surveys**, you'll see your active surveys. Click on the **Knowledge14 Feedback** survey and submit your answers.



Lab Success Verification

1. Your survey should look like this.

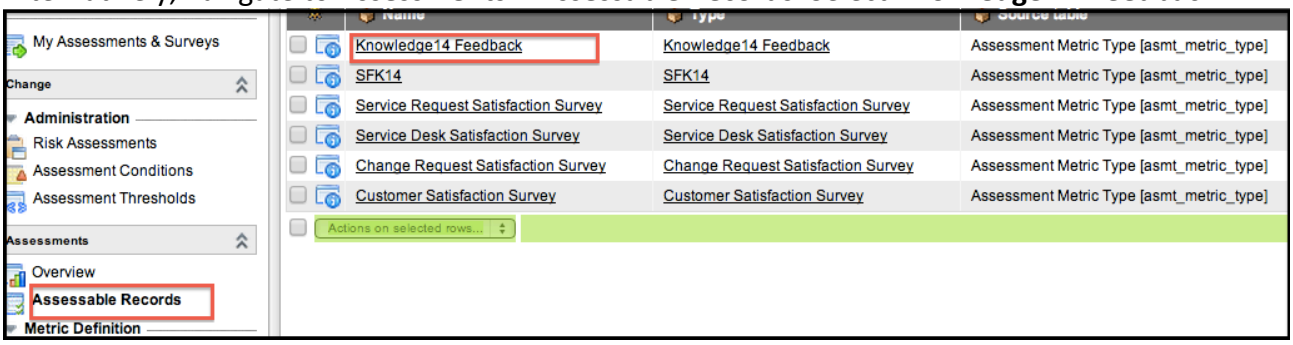


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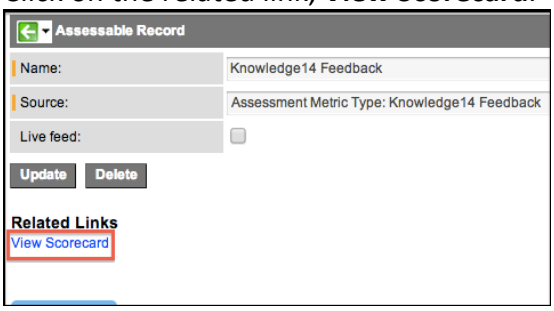
Display your results

Your responses will be displayed on a scorecard that is automatically generated. After switching back to admin, navigate to **Survey Management > View Surveys.** Select **Knowledge 14 Feedback.**

1. Alternatively, navigate to **Assessments > Assessable Records**. Select **Knowledge 14 Feedback**.

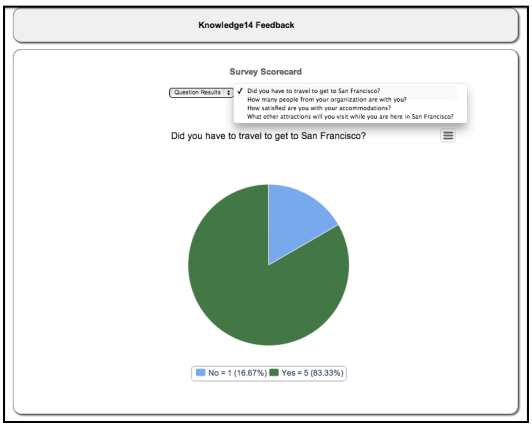


2. Click on the related link, **View Scorecard**.



Your results will appear in the Scorecard.





Take the survey a second time with a different user. To view individual responses, select **Question Results** from the left-hand choice list. Select your question from the right-hand choice list and your results will appear!

You can collect even more granular metrics and even leverage the data in your instance by using additional capabilities of the ServiceNow Assessment engine!

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Lab Goal

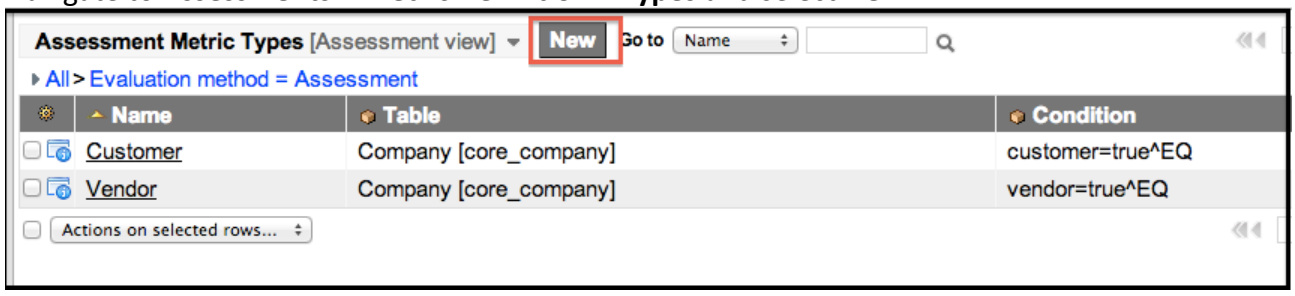
This lab focuses on the creation of a new assessment, utilizing both survey-based inputs and the data within your ServiceNow instance, accessed via a script. Bubble Charts are new in Eureka, and provide additional capabilities for you to display your data.

Lab 2
Create Assessment

Creating the new metric type for Microsoft Software

Using the **Assessments > Types** module, create a new metric type for your Microsoft licenses based on the Software table. Using the condition builder, we can limit our assessment to only a limited number of applications.

1. Navigate to **Assessments > Metric Definition > Types** and select **New**.

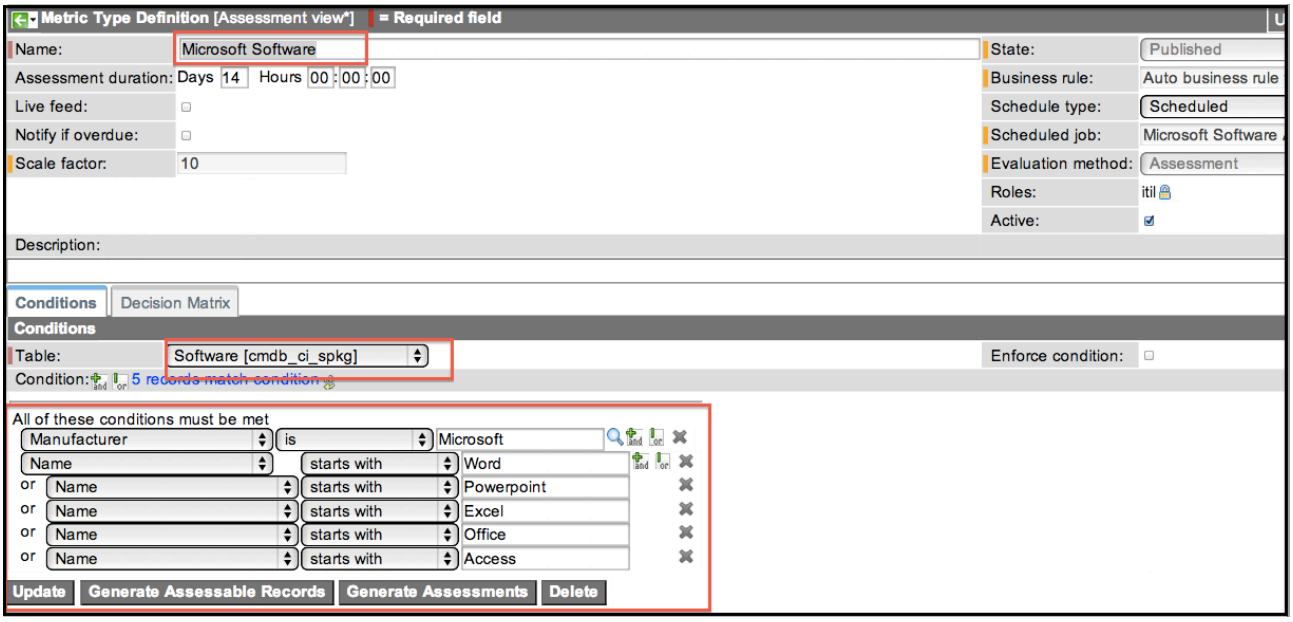


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2. Enter the field values below:

   Name: **Microsoft Software**
   (Conditions Tab) Table: **cmdb_ci_spkg**

   Conditions:
   (Manufacturer) (is) (Microsoft) AND
   (Name) (starts with) (Word)
   OR (Name) (starts with) (Powerpoint)
   OR (Name) (starts with) (Excel)
   OR (Name) (starts with) (Office)
   OR (Name) (starts with) (Access)



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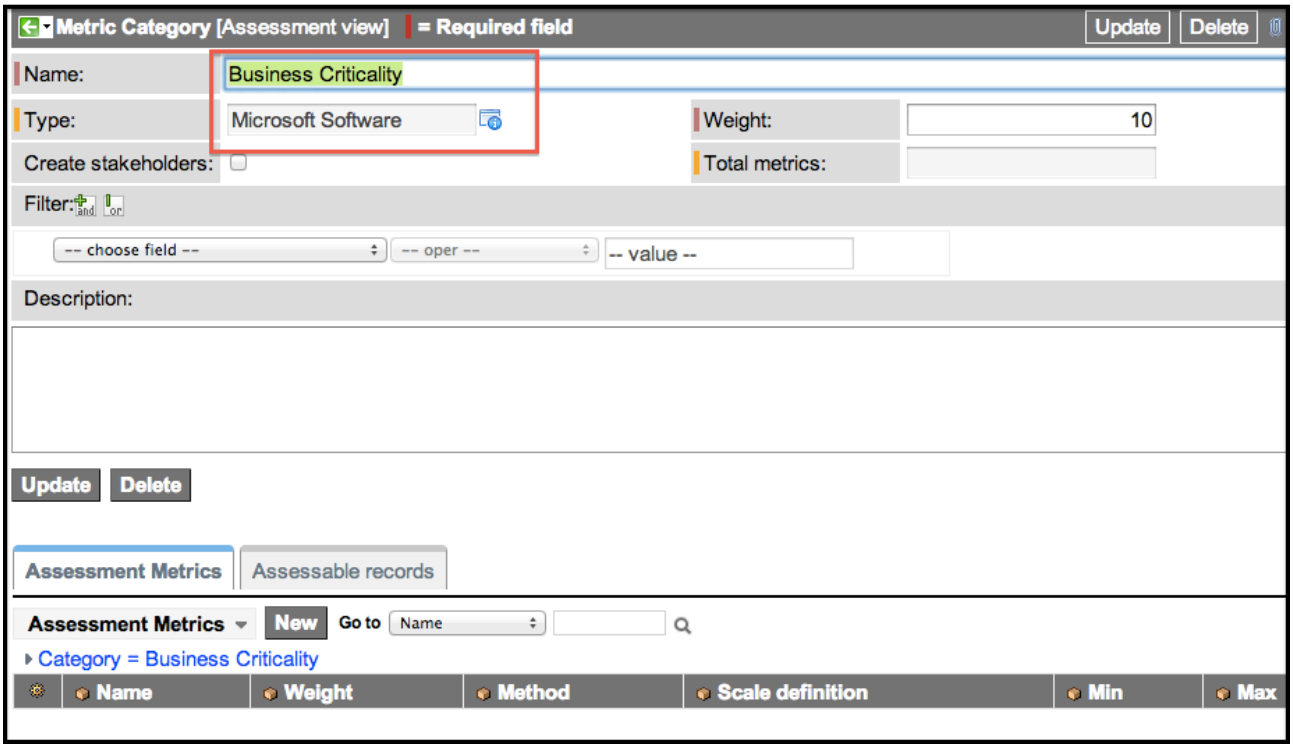
Create Metric Categories

Next, we'll need to tie some **metric categories** to the type. We'll be evaluating these applications on **criticality, ease of use, quality of support** and **reliability**.

1. Navigate to **Assessments > Metric Definition > Categories** and select **New**.

2. The following fields are all that will be needed for now.

   Name: **Business Criticality**
   Type: **Microsoft Software**



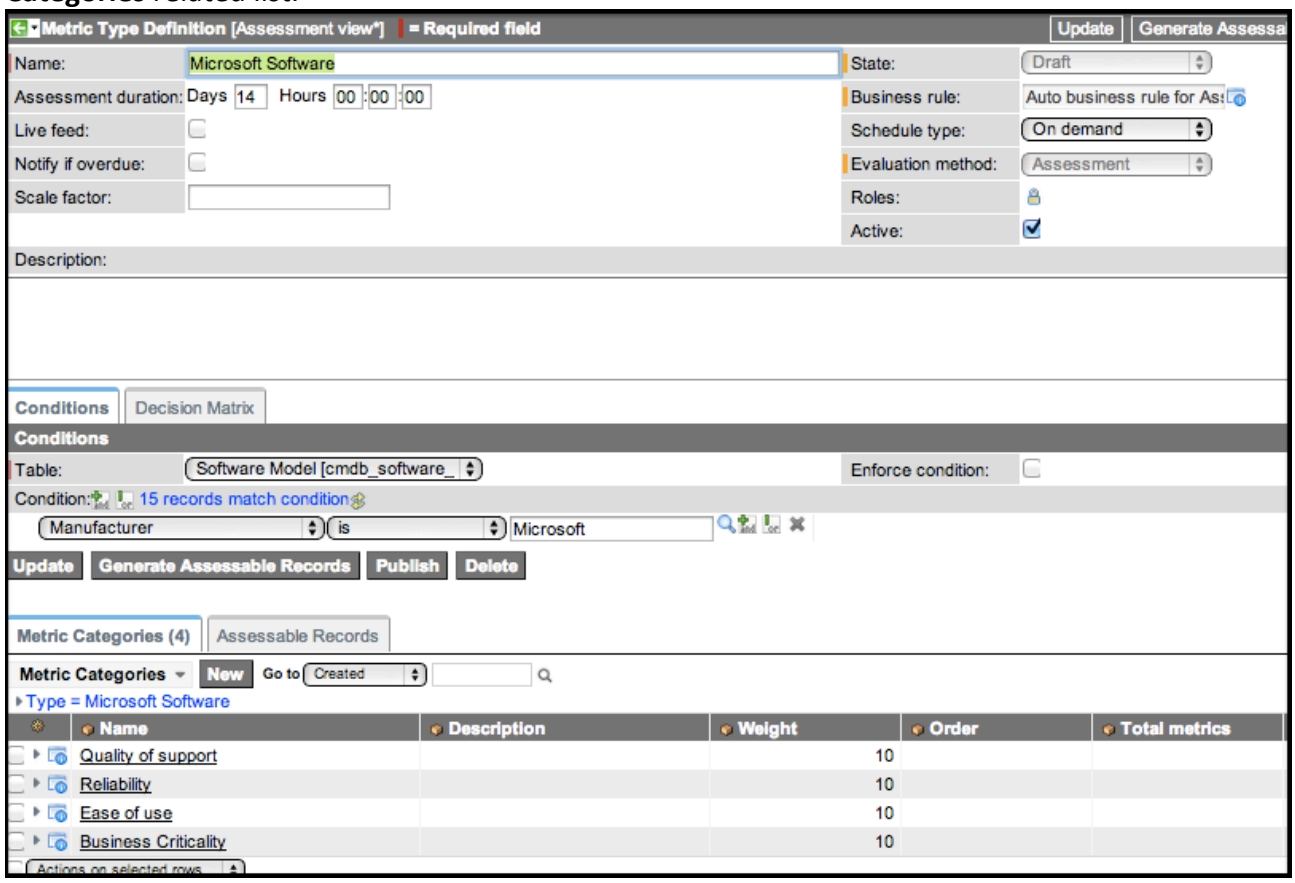
3. Now repeat the process for **ease of use**, **reliability**, and **quality of support**.

4. Navigate back to **Assessments > Metric Definition > Types**, and open the **Microsoft Software** metric type.

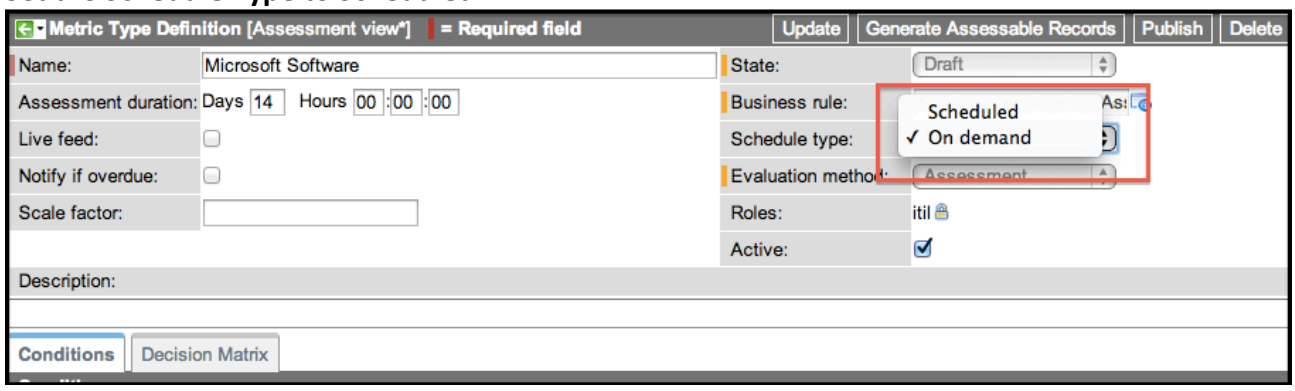
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Verify your results

1. You should now see all of your metric categories as related records under the **Metric Categories** related list.



2. Set the **Schedule Type** to **Scheduled**.



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Create metrics

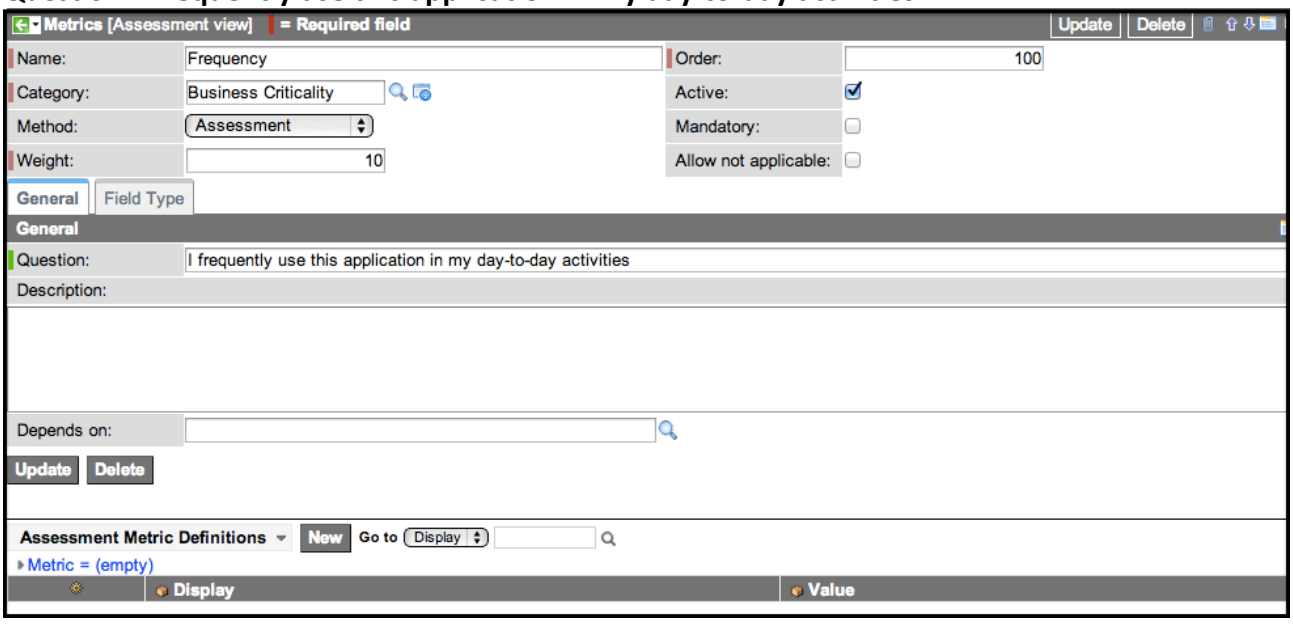
We know what we're going to be measuring and what aspects we'll be measuring. Now all we need is to create the specific measurements or Metrics, we'll be collecting.

By navigating to the **metric category "Business Criticality",** we can create all the metrics for that category easily.

1. Navigate to **Assessments > Metric Definition > Categories** and select **Business Criticality**,

2. On the related list labeled **Assessment Metrics**, Click **New**. Enter your first metric as follows:

   Name: **Frequency**
   Question: **I frequently use this application in my day-to-day activities**

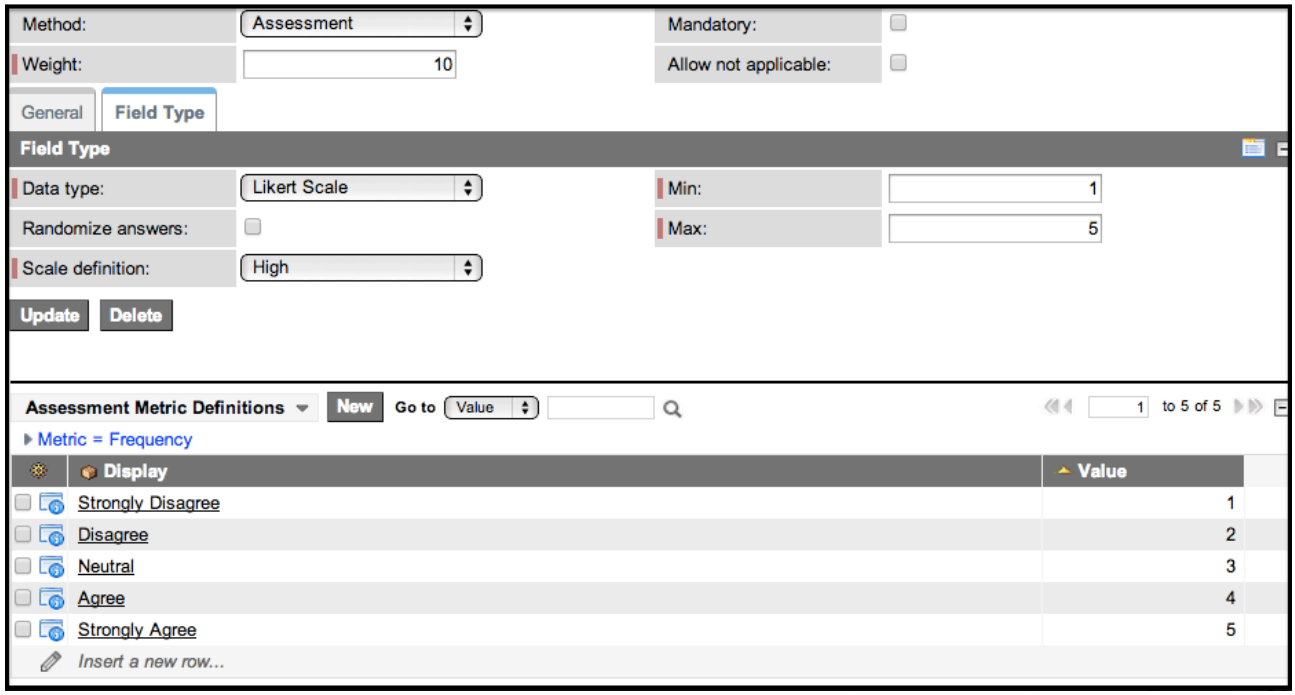


Now we'll have to configure our responses. In this case, we're going to ask our respondents to answer questions based on how strongly they agree with a statement.

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3. On the **Field Type** tab, enter the following:

   Data Type: **(Likert scale)**
   Range: **(Min=1, Max=5)**
   Submit and come back to the metric.



4. Rather than just using numbers for our ratings, we will have the respondents select from "Strongly Disagree" to "Strongly Agree". This makes the assessment more intuitive and returns more consistent results. Using the Likert 5 template, the metric definitions are created for us. You may also add metric definitions to suit your needs.

5. Click **Update** and your first metric is saved!

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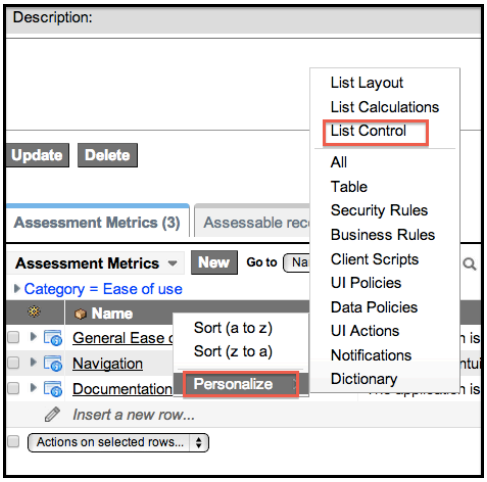
Create additional metrics

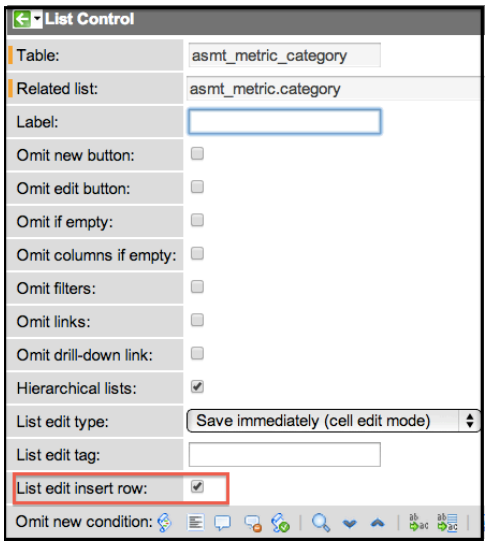
Now create additional metrics leveraging the same scale.

Suggestions (Name:Question)

- **Standardization**: This application is used by most people in the company
- **Business dependency**: Key business functions rely on this application
- **Personal**: I rely on this application to perform my job

Hint: to make it easier to enter data, enable **List Edit Insert Row** on the Metric Definition. You can complete the Metric Definitions quickly without having to navigate away from the Metric.





Once you're done, you should have a set of metrics set up as a scale and an identical set of metric definitions for each.

Let's fill out two of the remaining three metric categories in the same way. Here are some suggestions for content, but feel free to add your own as well!

Quality of Support

- Support technicians are knowledgeable and helpful
- Online support is easy to use and helpful
- I have consistently been able to resolve any issues quickly

Ease of Use

- The application is easy to use
- The application is well documented in print or online
- Navigation is intuitive

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Scripted Metrics

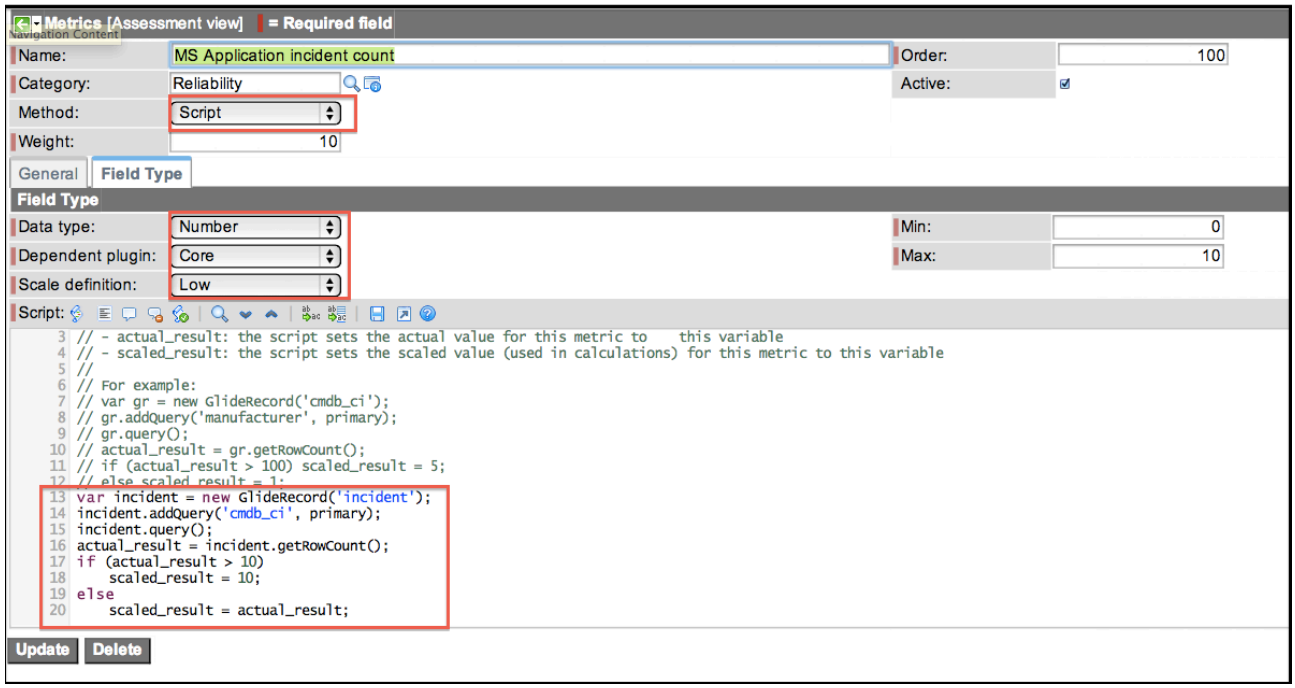
You can also create metrics that will leverage the data collected in ServiceNow. In this case, our Reliability metric will pull Incident data for our selected applications. We'll evaluate how many incidents were logged for our applications.

1. Navigate to **Assessments > Metric Definition > Metrics**
2. Click **New**. Enter a **Name** and select a **Category** such as **Reliability**.
3. On the **Field Type** tab, select the following:

   Method: **Script**
   Dependent Plugin: **Core**
   Scale Definition: **LOW**

4. Enter the following script into the script window:

```
var incident = new GlideRecord('incident');
incident.addQuery('cmdb_ci', primary);
incident.query();
actual_result = incident.getRowCount();
if (actual_result > 10)
  scaled_result = 10;
else
  scaled_result = actual_result;
```



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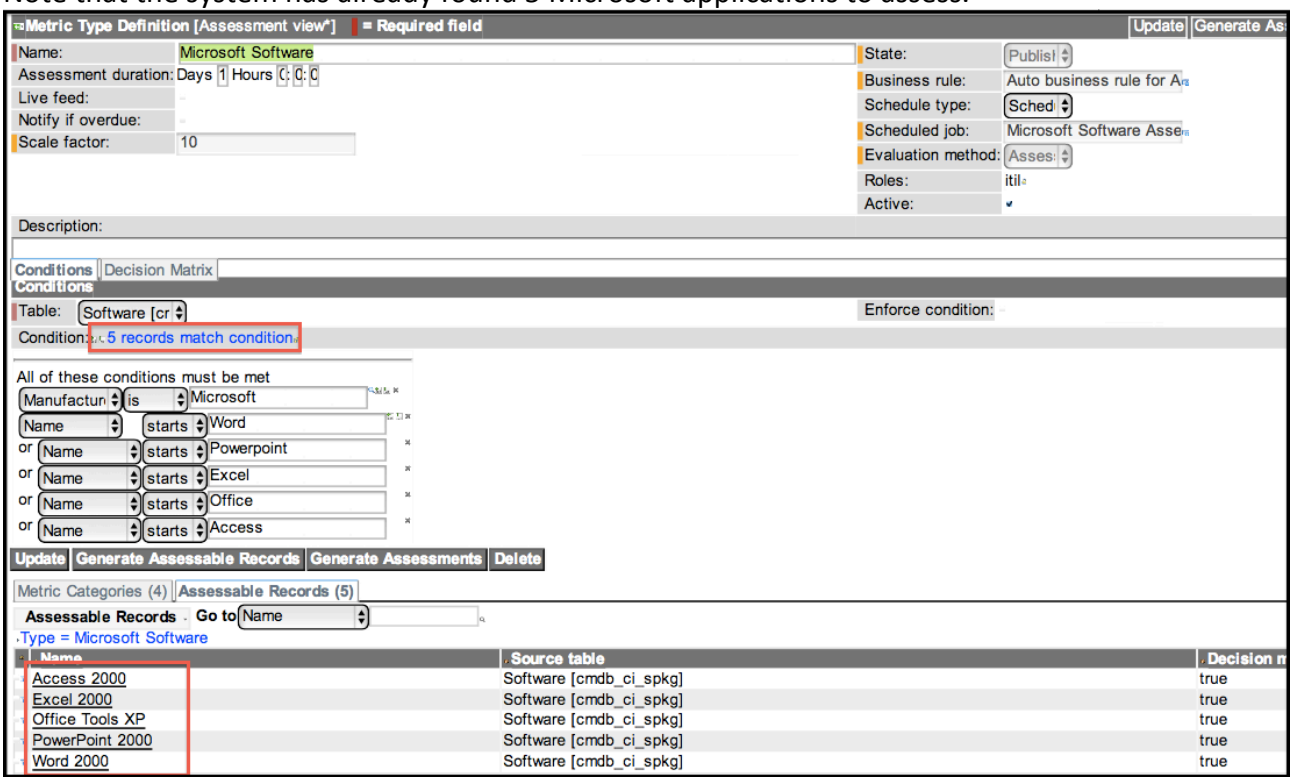
Generating Assessable Records

Now that the Metric Type, Categories, Metrics, and Metric Definitions are set up, we can get to the task of defining the Software Models we'll be assessing.

1. Navigate to **Assessments > Metric Definition > Types**. Select **Microsoft Software**.

2. Click on the related link **Generate Assessable Records**. Navigate back to the Metric Type.

3. Note that the system has already found 5 Microsoft applications to assess.



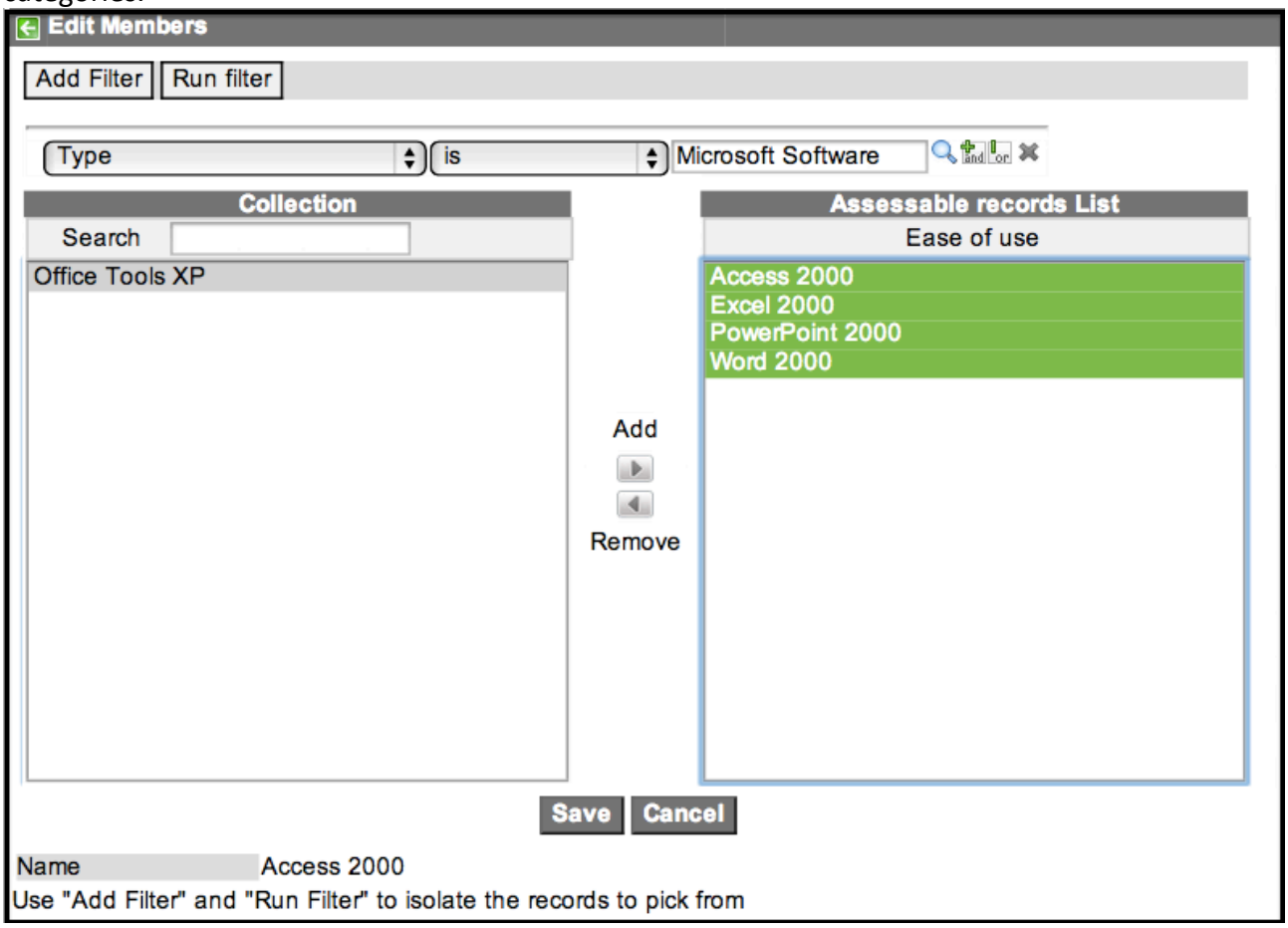
4. Click on **Generate Assessable Records**.

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Selecting Assessable Records for Each Category

For each Metric Category, you may not want to have every single Microsoft Application in the scope of your assessment. To control this, click Edit on the **Assessable Records** related list.

1. Select only the applications you want to assess using metrics for your assessment and click **Save**. In this case, we'll select **Access, Excel, Word,** and **Powerpoint**. Repeat for your 2 other categories.



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Setting up your Category Users

We'll need to set up who will actually be providing input into our assessment. These are called **Category Users**.

Depending on how your assessment is configured, you may want to have some of your users provide feedback on specific Metric Categories. For example, you may only want your Procurement team to provide feedback on manufacturer RMA performance or your Server team to provide feedback on the configurability of different server models. This relationship between users and their categories is defined at the category level.

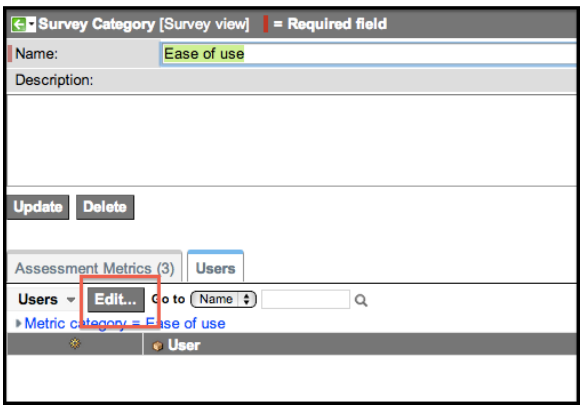
1. Navigate to your **Metric Categories Assessments > Metric Definitions > Categories**.

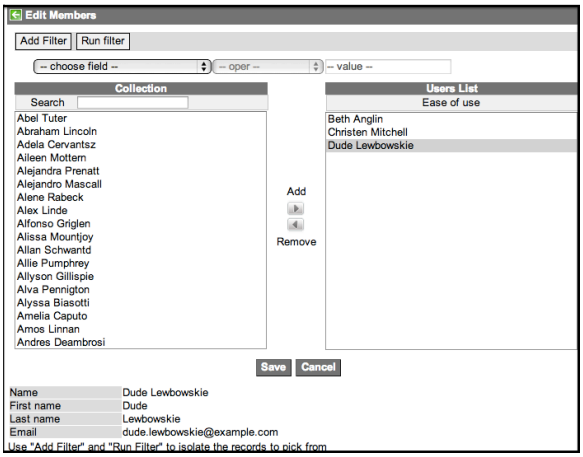
2. Select **Ease of Use**.

3. Under the Users related list, click **Edit**.

4. Select 3 users who will be tasked with providing responses for this category.

5. Select your users and click **Save**.





Your users are tied to the Metric Category and their assessments will only contain the metrics in the categories they're tied to.

Repeat the process for **Quality of Support** and **Business Criticality**. Try leaving one of your users out of one of the categories to see how this impacts the assessment.

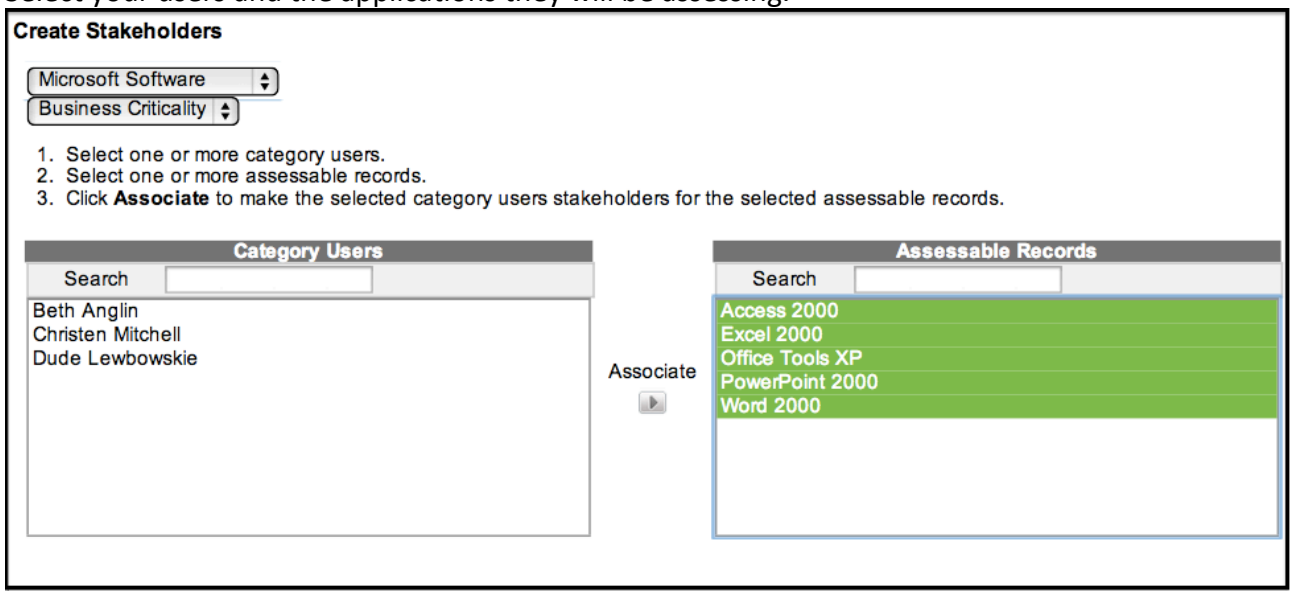
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Create Stakeholders

Finally, we'll need to create our users as stakeholders by associating the category users we just created with specific assessable records.

1. Navigate to **Assessments > Advanced > Create Stakeholders**
   Type: **Microsoft Software**
   Category: **Ease of Use**

2. Select your users and the applications they will be assessing.



3. Click **Associate**.

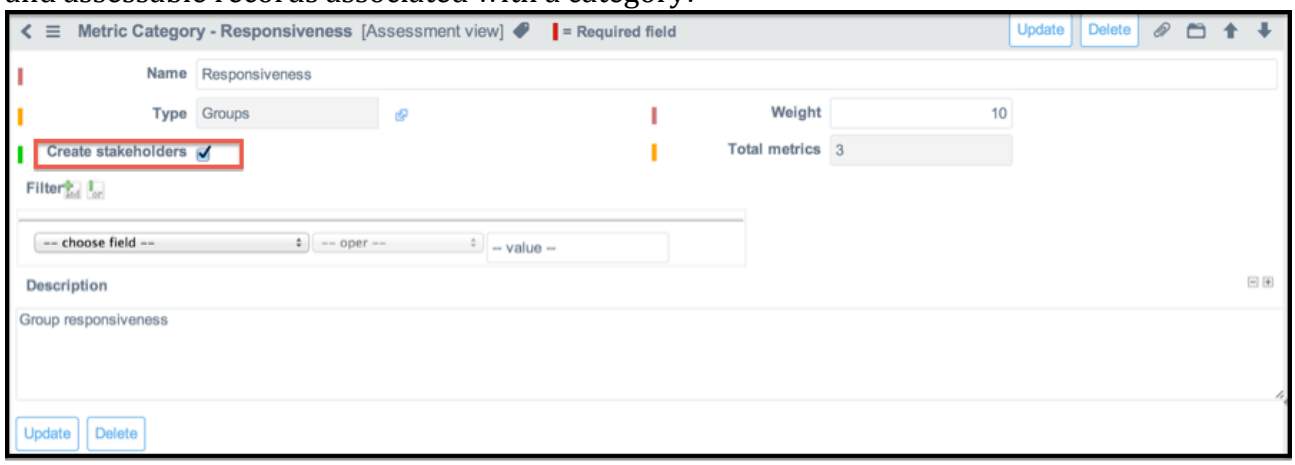
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Lab Success Verification



Hint: If you want to associate a group of users to the same group of applications, you can multi-select users and applications and only click **Associate** once to tie them all together.

You can also check **Create stakeholders** to create stakeholders automatically from all category users and assessable records associated with a category:



Try this for your other categories. Notice that any users you left out of a Category won't appear as a stakeholder option.

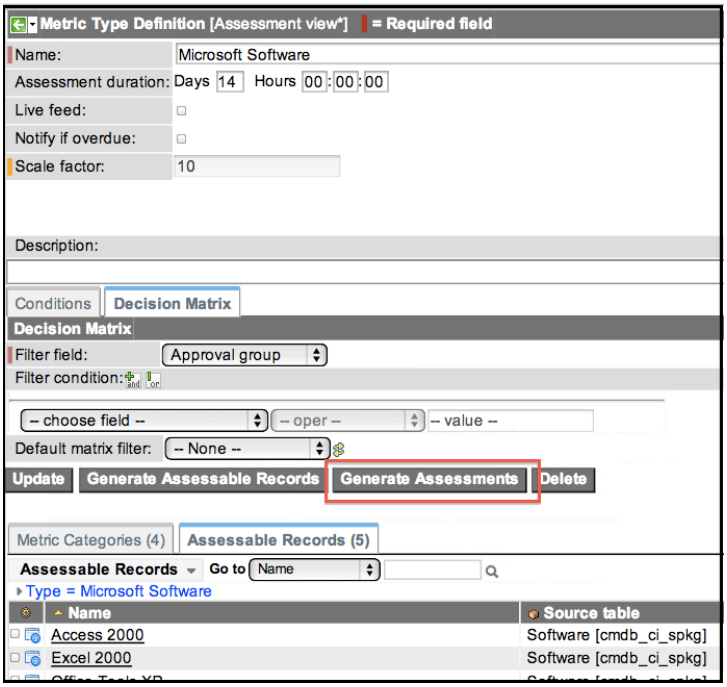
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Generating your assessment

Now that you've set up your **types, categories, metrics, category users and stakeholders**, you're ready to kick off your first assessment

1. Navigate to **Assessments > Metric Definition > Types** and select **Microsoft Software**.

2. Click **Generate Assessments**.



3. **Publish** the assessment.

Lab Success Verification

Did it work? Find out!

1. Navigate to **Assessments > Assessments > Assessment Instances**. Your assessments should appear at the top or at the bottom!



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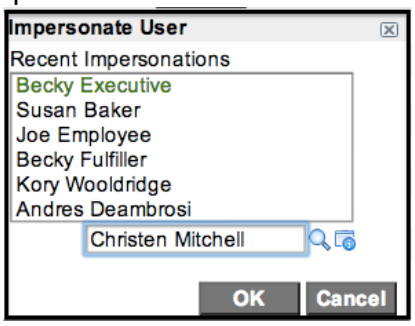
Taking the assessments

Your stakeholders all have assessments waiting to be taken.

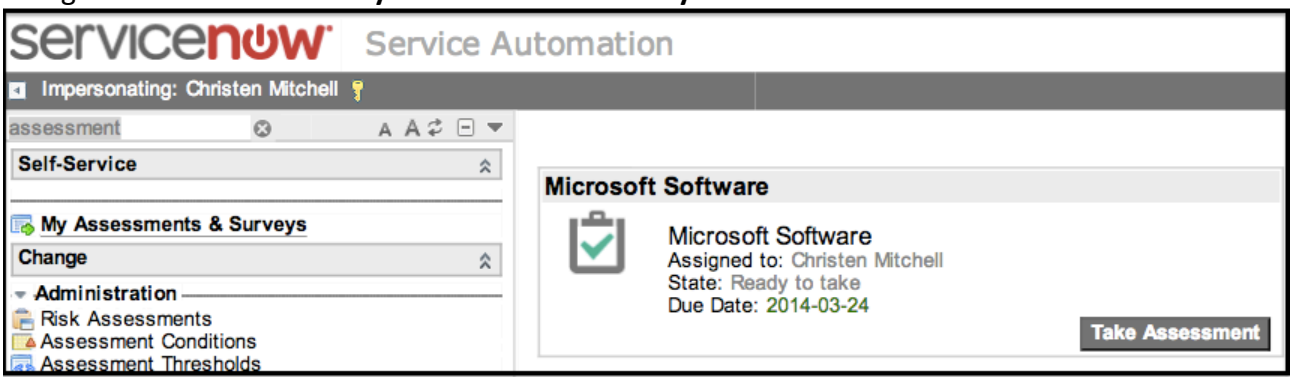
1. Click on the **Impersonate** Icon in the upper-right corner of your screen.

2. Select one of your stakeholders to impersonate.





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

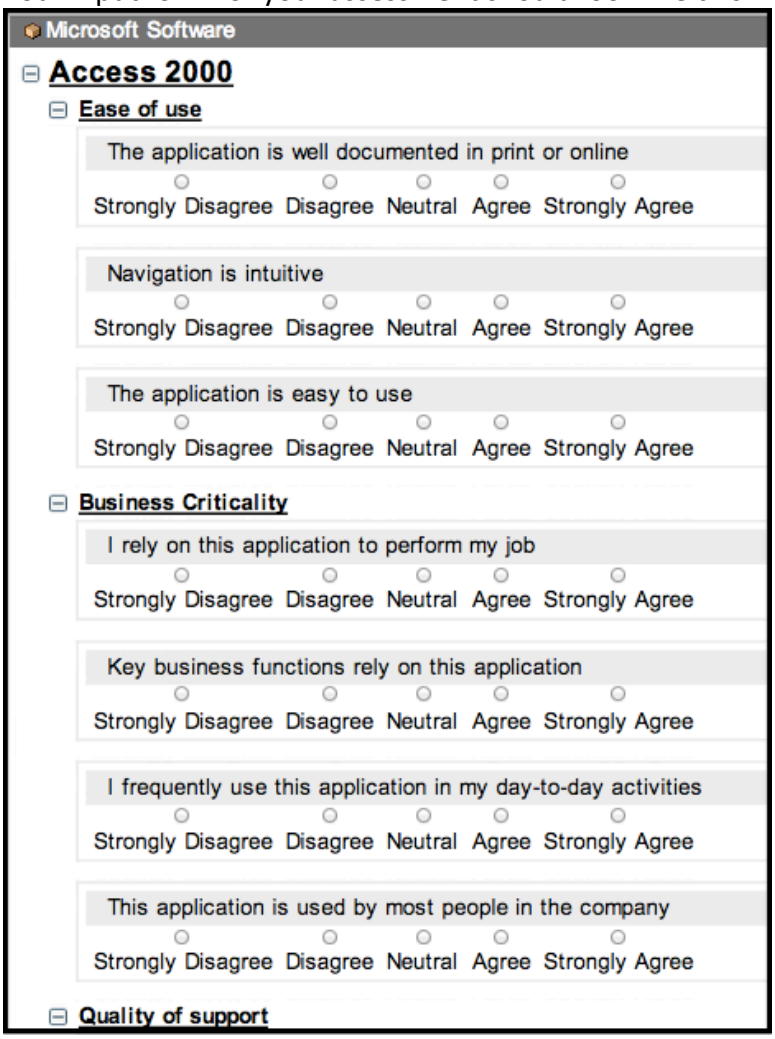


4. Click **Take Assessment.**

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Lab Success Verification

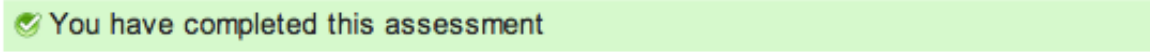
1. Your input form for your assessment should look like this:



Provide responses for your questions to generate some data. Now impersonate your other 2 stakeholders and answer for them, too.

Lab Success Verification

1. Once you have provided your responses, you should receive this message.



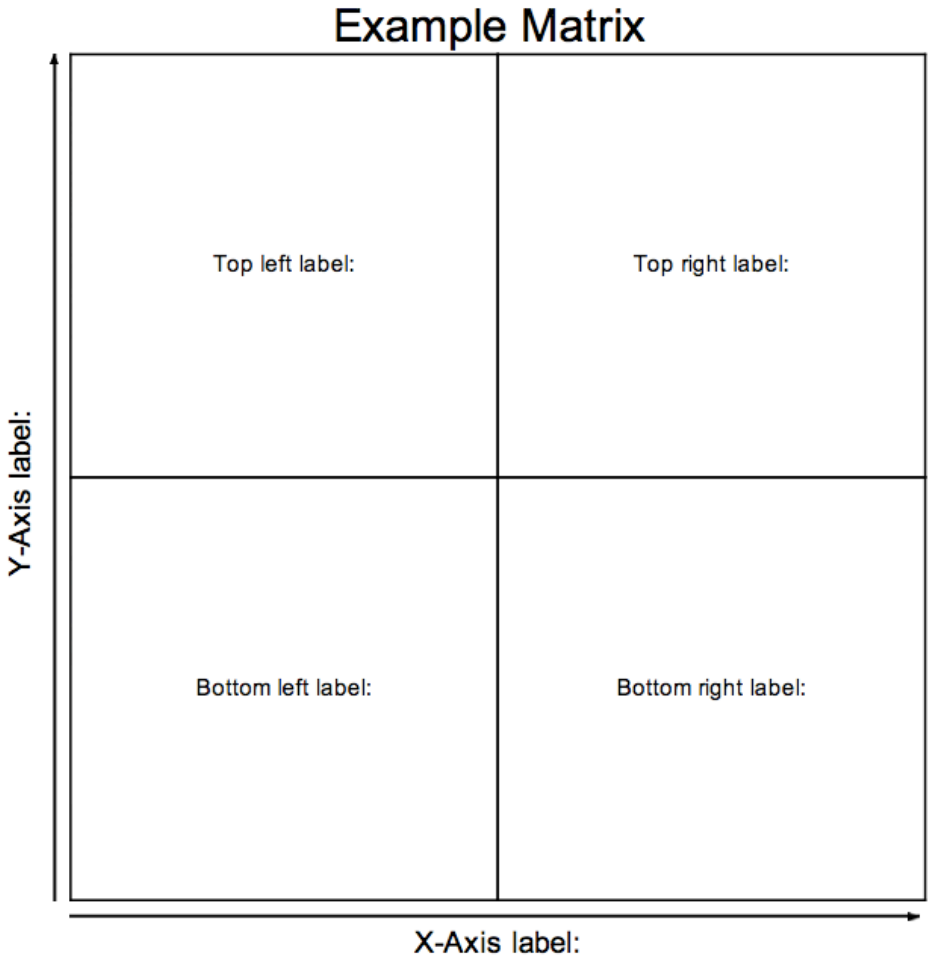
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Charting your results

The assessment engine offers 3 methods for visualizing results, the **Decision Matrix, Scorecard**, and **Bubble Chart**.

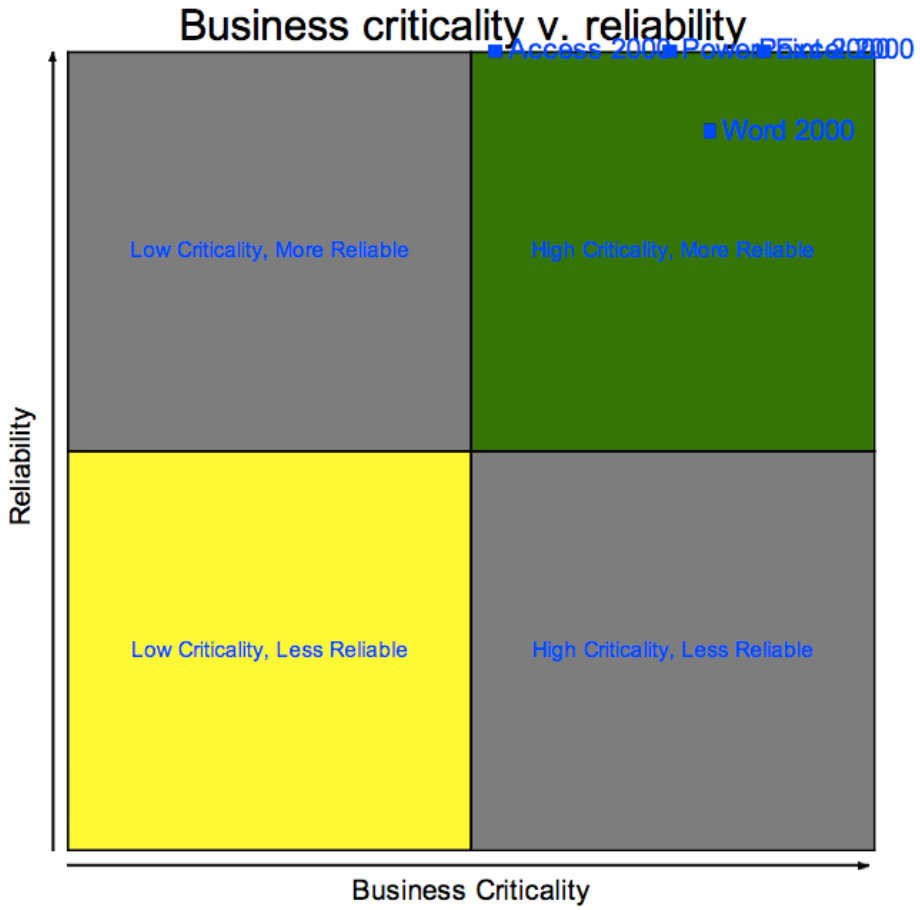
Decision Matrix

The **Decision Matrix** maps your average metric category scores on a 2-dimensional chart, similar to a "Magic Quadrant". You can plot metric categories against each other and display the averaged scores for all your assessable records on your matrix.



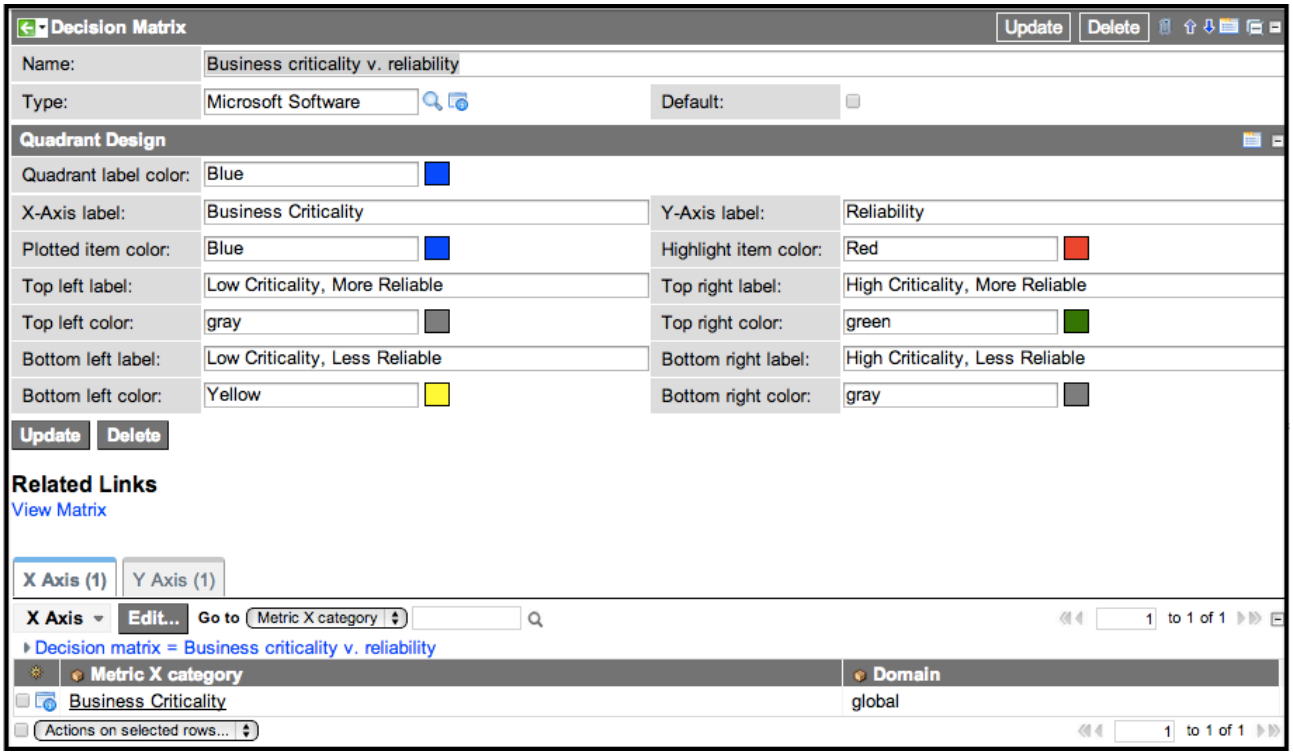
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Decision matrices offer a lot of flexibility for you to manipulate the color scheme of your quadrants, labels, and label names. Using the diagram above as a guide, can you configure your matrix to look like this?



Here's a hint as to how this was configured. Quadrants, labels, and label colors can all be configured to your needs. In this example, we're only using one metric category per axis, **Business Criticality** and **Reliability**. You can combine metric categories in a single axis to arrive at a compound score. Perhaps Reliability and Support scores could be combined to come up with an overall dependability score.

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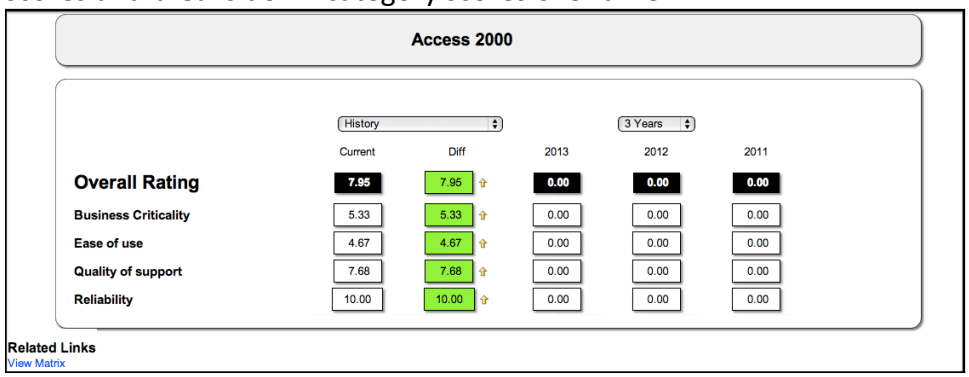


Here we just used simple color names, green, blue, yellow, etc. You can also use RGB hex (our shade of green is ***#008000***) or RGB decimal (***RGB(0,128,0)***) to use any color you like.

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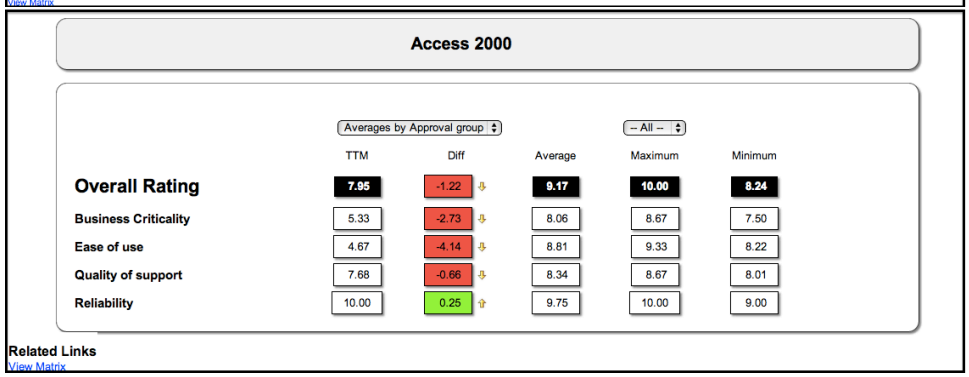
Scorecard

Hovering over any score on the Matrix will pop up a summary score for your assessable record, in our case, the application. Clicking in the score will bring up a detailed History scorecard that shows overall scores and breaks down category scores over time.



In addition to history, additional views comparing applications against each other, breakdowns among categories, category metrics, and averages for approval groups are also available by changing the drop down from History to Categories.



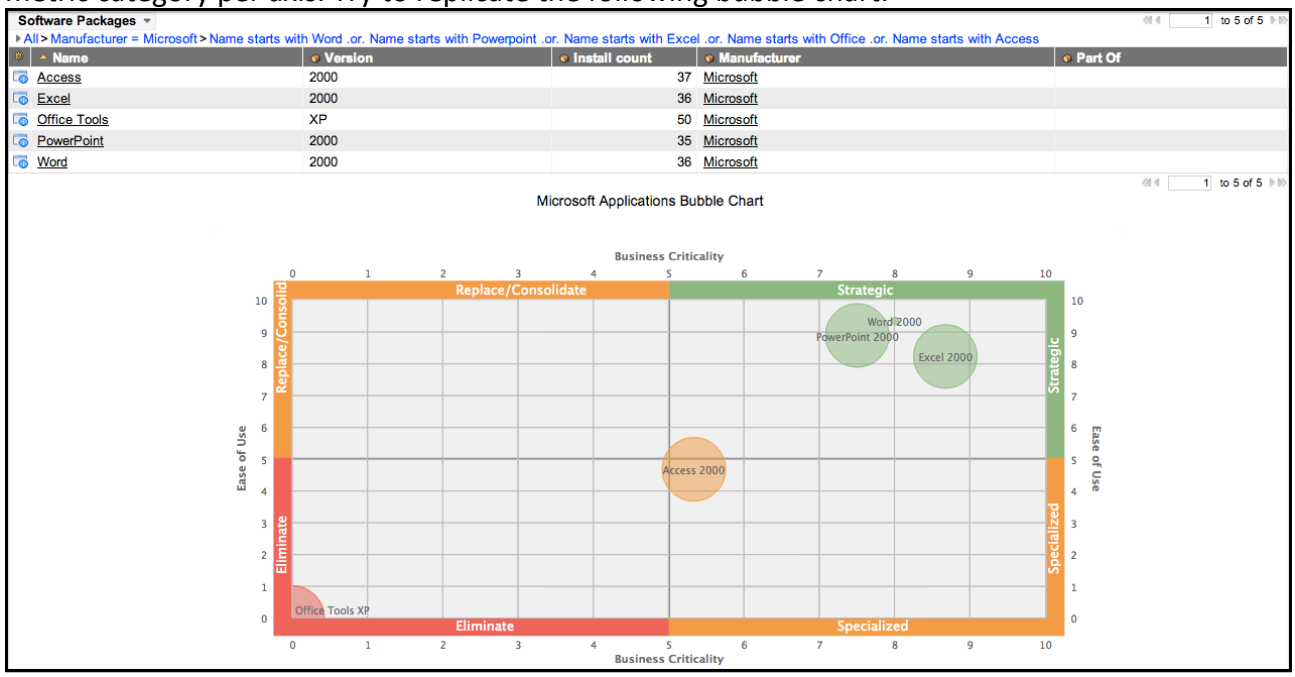


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Bubble Charts

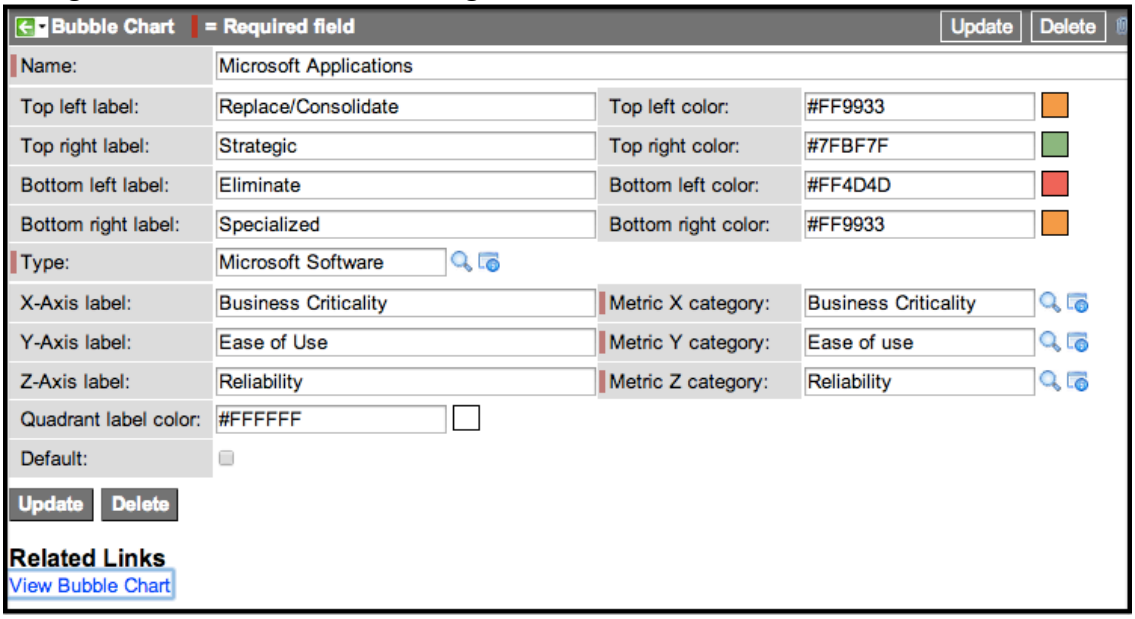
You may need to display more complex views of your metrics. A new option for the Eureka release is bubble charts. Bubble charts allow you to plot category values on a similar quadrant format, but also allow you to represent a 3rd axis, the **Z-axis**, by the size of the bubble.

The setup is nearly identical – just add your Z-Axis category. In bubble charts, you may only select one metric category per axis. Try to replicate the following bubble chart.



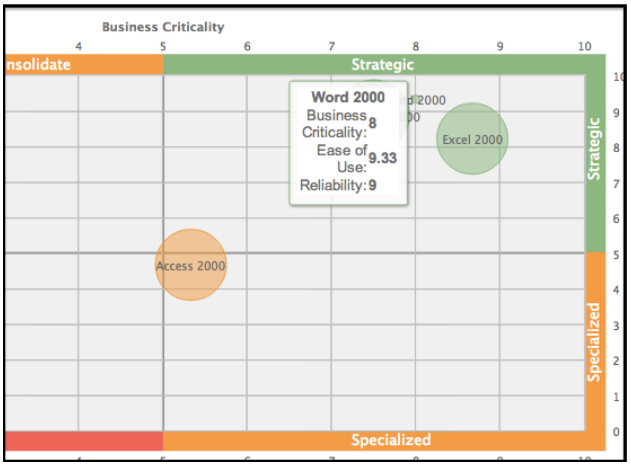
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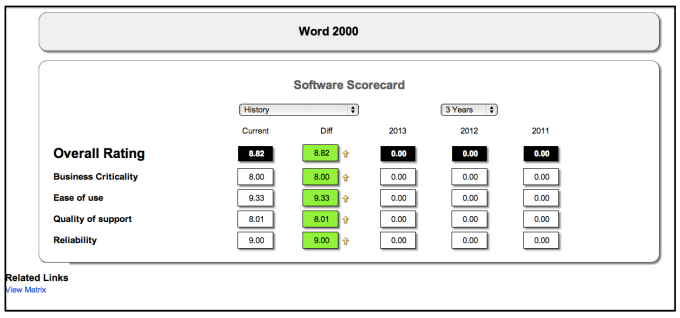
The scores you submitted in your assessments may result in a slightly different look, but your configuration should look something like this.



Note that we made some modifications in labels. Rather than simply labeling our quadrants by the metric category names as we did before, we interpreted the metrics to support our evaluation and identified the various tools as to whether we want to eliminate them, replace or consolidate, keep as strategic, or keep because they are specialized tools for certain groups. Notice also, that the bubbles will take on the color of their quadrant – especially helpful if a score is close to crossing the threshold into another quadrant.

Just as in a **Decision Matrix**, hovering over a score pops up the current scorecard results. Clicking on the score takes you to the full scorecard.





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Additional Resources

http://wiki.servicenow.com/index.php?title=Book:Assessments

http://wiki.servicenow.com/index.php?title=Assessments

Some general information on content best practices

http://www.aapor.org/Best_Practices1.htm#.Ux4lmOewKeo

http://usability.com/2012/02/fundamental-best-practices-of-an-online-survey/

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