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Surveys & Assessments

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Agenda

Introductions

Updated Surveys in Eureka

Lab 1.1 Surveys

The Assessment Engine

Lab 2.2 Assessments

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Objectives

- At the end of this presentation, you will be able to explain:
  - Survey Management
    - Assessment-based Surveys
    - Legacy Survey Migration
  - Assessments
    - Bubble charts
    - Trigger conditions

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Survey Management

Assessment-based Surveys

Legacy Survey Migration

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Survey Management: Purposes

- Replace Surveys by leveraging Assessment engine
  - Provide attractive, modern survey capabilities
- Survey Creator
  - Support simplified, ad-hoc assessment generation
- Scorecard for Surveys
  - Improved result presentation with new scorecard view
- Existing surveys to Assessment migration
  - Preserve compelling existing capability while providing new value
  - New application called Survey Management includes legacy survey modules

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Survey Management: Overview

- Create a survey in a couple of minutes: add questions, and choose recipients, all in one simple interface
  - Preview / Publish survey
- Set numerical values for a question's answer options to convert survey responses to scores
- Questions can depend on a previous question belonging to the same category
- Restrict a survey to specific users and send all of them invitations simultaneously
- Set a schedule to automatically assign a survey to users and to limit how often the same user can take a survey
- Option to save survey responses anonymously
- View survey results graphically on a scorecard
- Deactivate a survey to prevent users from completing it
- Migrate legacy surveys

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Survey Management - Plugins

- Plugin: Assessment (activated by default)

- Plugin dependency:
  - Workflow Runtime Engine
  - Survey management (legacy survey plugin)
  - Best Practice – Task Survey Management (legacy plugin)

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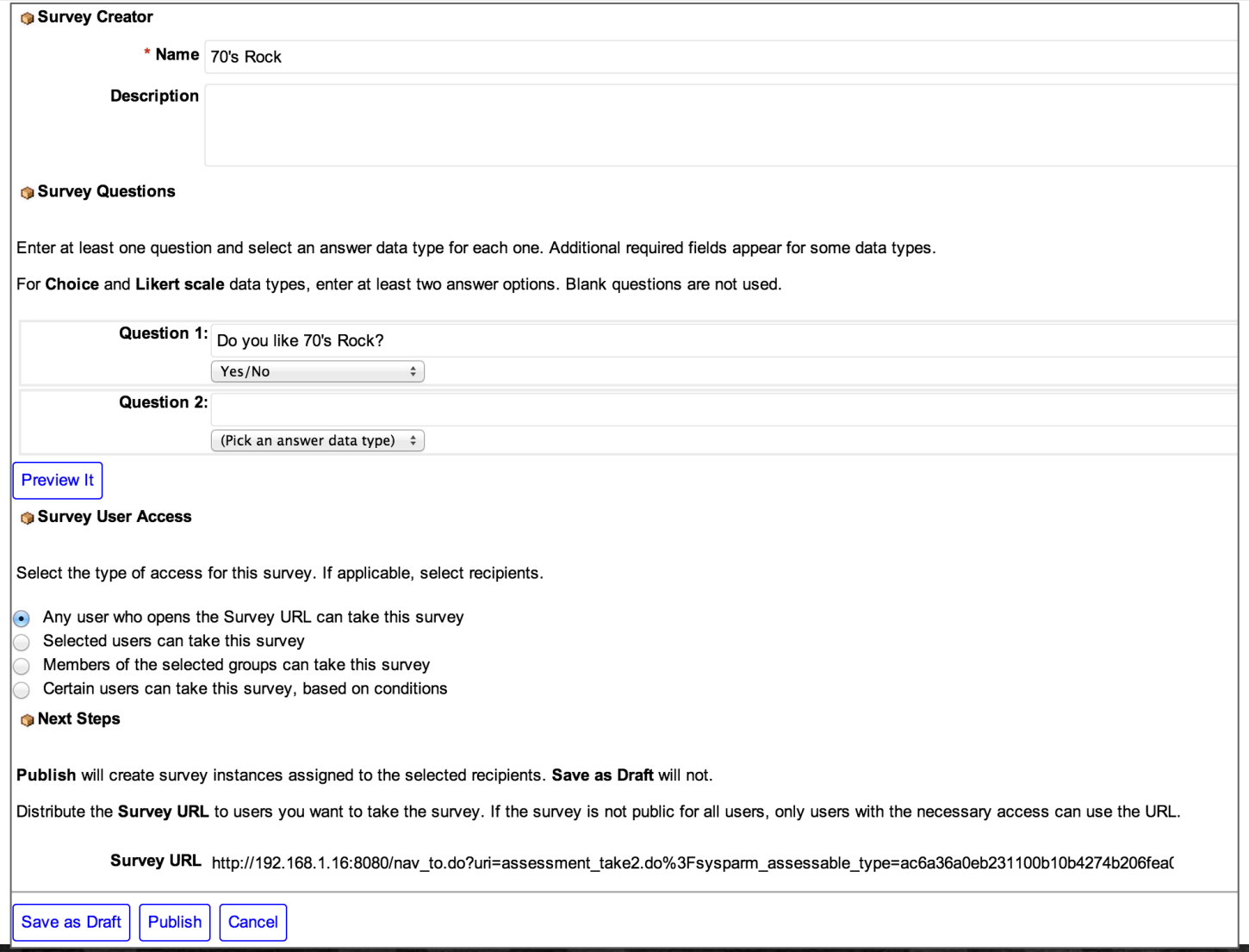
Survey Management - Roles

- Roles:
  - survey_reader
  - survey_admin
  - assessment_admin

- Demo data users: *Bow Ruggeri, Carol Coughlin*

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Survey Creator



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Survey Creation / View

- Survey Creator
  - Save as Draft / Publish
- Open surveys
  - Any user who opens the Survey URL can take the survey after it has been published
  - User may have to log in
- Survey is created as an assessment metric type with one category matching the survey name
- View surveys module
  - Add / Edit categories
  - Add / Edit questions (i.e. metrics) to categories

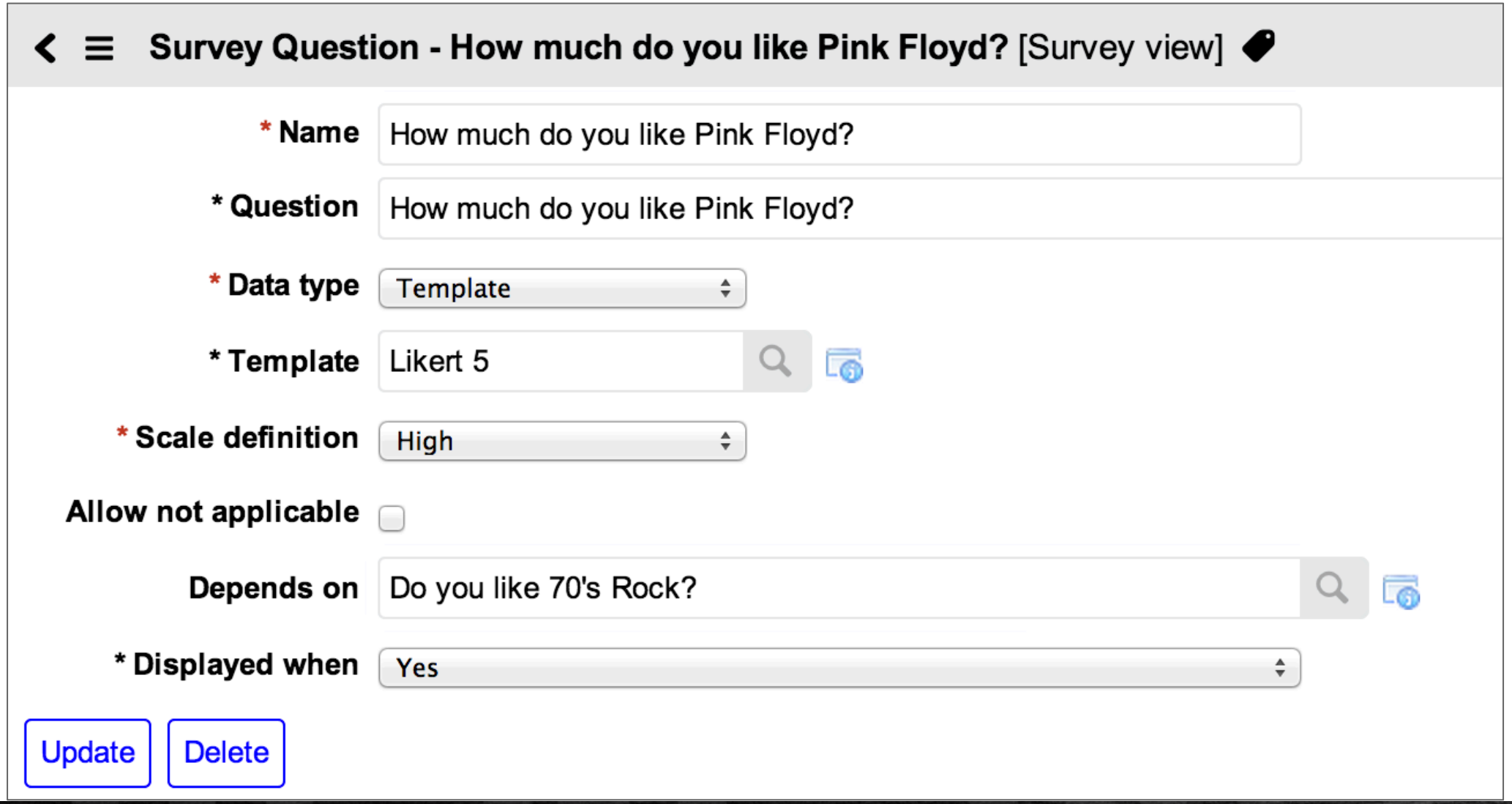
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Question Datatypes

- Scores are based on a 10 point scale
- Datatypes that contribute to category rating
  - checkbox
  - choice
  - Likert scale
  - number
  - percentage
  - template
  - Yes/No
- Datatypes – no influence on rating
  - date
  - date/time
  - string: 3 options available (single line, wide, multi line)

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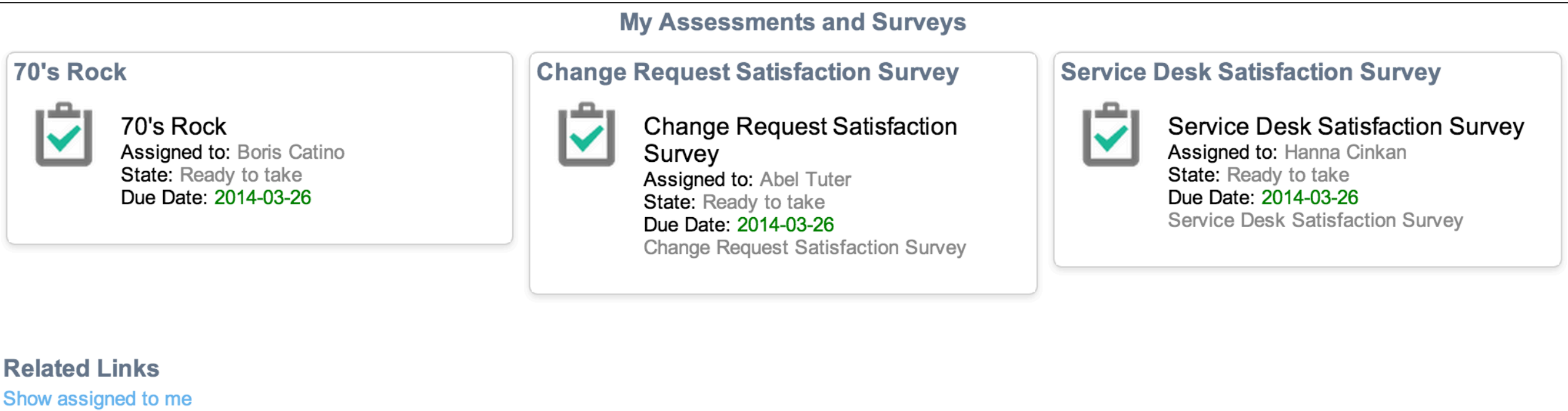
Dependent Questions



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Survey Assignments and non-Public Surveys

- Assign surveys to users or to groups
- Manage category users
- Invite users
- Administration view: My Assessments & Surveys module displays surveys assigned to anyone



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Taking a Survey

70's Rock

Do you like 70's Rock?

Yes

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
How much do you like LED Zeppelin?	○	◉	○	○	○
How much do you like Pink Floyd?	○	○	○	◉	○

Dependent question to Pink Floyd

Submit Save Cancel

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Survey Instances

Assessment Instance - AINST0002013 [Survey view]

Delete

Number	AINST0002013	**State**	Complete
Metric type	Service Desk Satisfactior	**Assigned to**	Bow Ruggeri
Due date	2014-03-14	**Expiration date**	

Delete

Assessment Instance Questions Go to Category

<< < 1 to 6 of 6 > >>

Instance = AINST0002013

Category	Metric	Source	Source table	String value	Value
Service Desk Satisfaction Survey	Please rate the technical competency of ...	Assessment Metric Type: Service Desk Satisfaction Survey	asmt_metric_type	4	4
Service Desk Satisfaction Survey	Was technician able to resolve your issu...	Assessment Metric Type: Service Desk Satisfaction Survey	asmt_metric_type	No	0
Service Desk Satisfaction Survey	How courteous and respectful was the tec...	Assessment Metric Type: Service Desk Satisfaction Survey	asmt_metric_type	4	4
Service Desk Satisfaction Survey	Any other comments you would like us to ...	Assessment Metric Type: Service Desk Satisfaction Survey	asmt_metric_type		0
Service Desk Satisfaction Survey	How satisfied were you with the response...	Assessment Metric Type: Service Desk Satisfaction Survey	asmt_metric_type	1	1
Service Desk Satisfaction Survey	How satisfied are you with your overall ...	Assessment Metric Type: Service Desk Satisfaction Survey	asmt_metric_type	4	4

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Survey Responses

Metric Results [Survey view] **Go to** String value

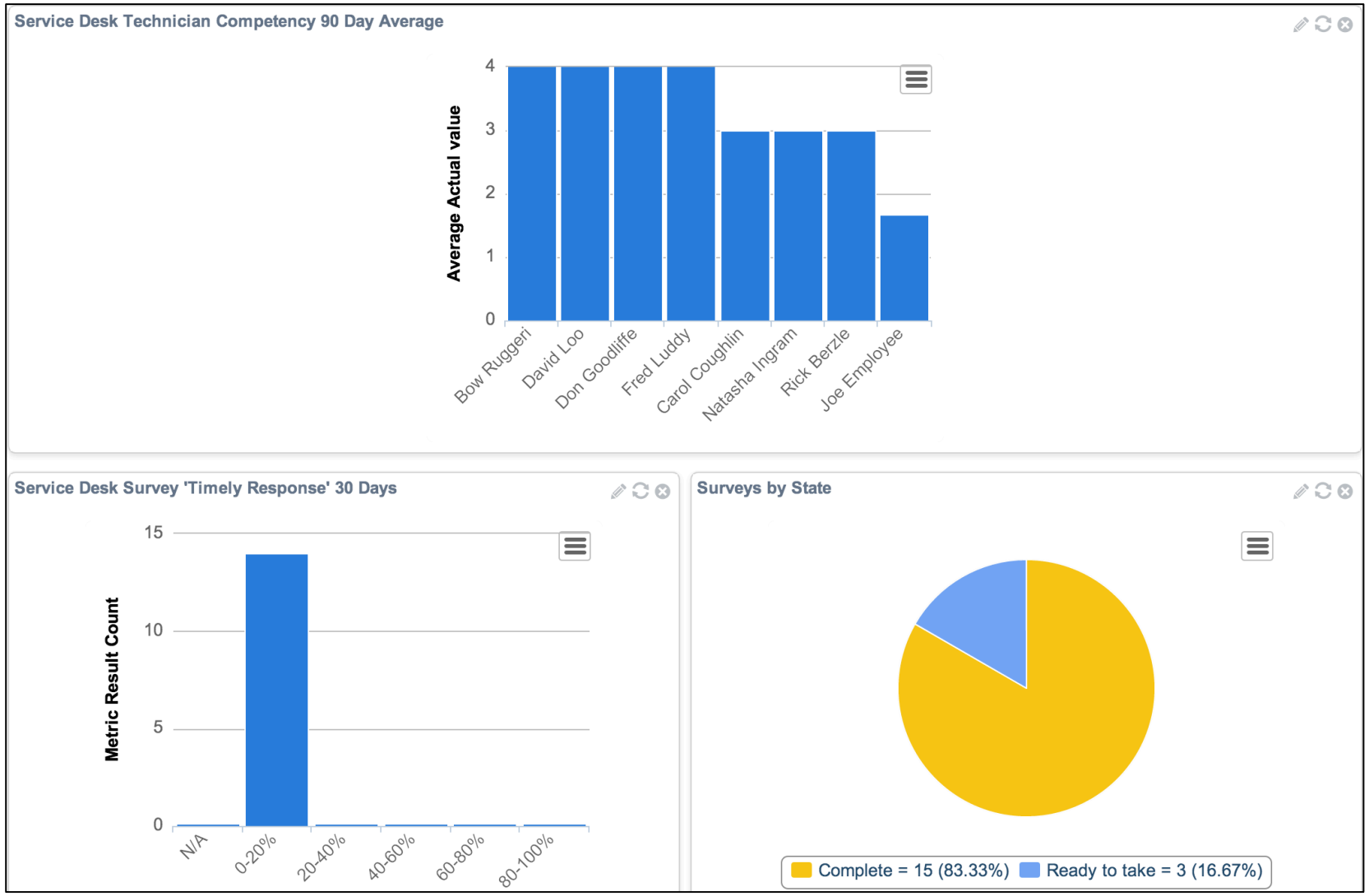
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All > Metric Type Evaluation method = Survey

Question	Type	Assigned to	String value ▲	Normalized value
How satisfied are you with your overall ...	Service Desk Satisfaction Survey	Carol Coughlin	4	1.33
How satisfied are you with your overall ...	Service Desk Satisfaction Survey	Bow Ruggeri	4	1.33
How satisfied are you with your overall ...	Service Desk Satisfaction Survey	Fred Luddy	4	1.33
How courteous and respectful was the tec...	Service Desk Satisfaction Survey	Joe Employee	5	1.67
Please rate the technical competency of ...	Service Desk Satisfaction Survey	Rick Berzle	5	1.67
How satisfied were you with the response...	Service Desk Satisfaction Survey	Joe Employee	5	1.67
How satisfied were you with the response...	Service Desk Satisfaction Survey	Joe Employee	5	1.67
How satisfied were you with the response...	Service Desk Satisfaction Survey	Rick Berzle	5	1.67
How satisfied are you with your overall ...	Service Desk Satisfaction Survey	Joe Employee	5	1.67
Any other comments you would like us to ...	Service Desk Satisfaction Survey	Joe Employee	Keep up the great work!	0
Would you contact the customer support g...	Customer Satisfaction Survey	System Administrator	N/A	-5

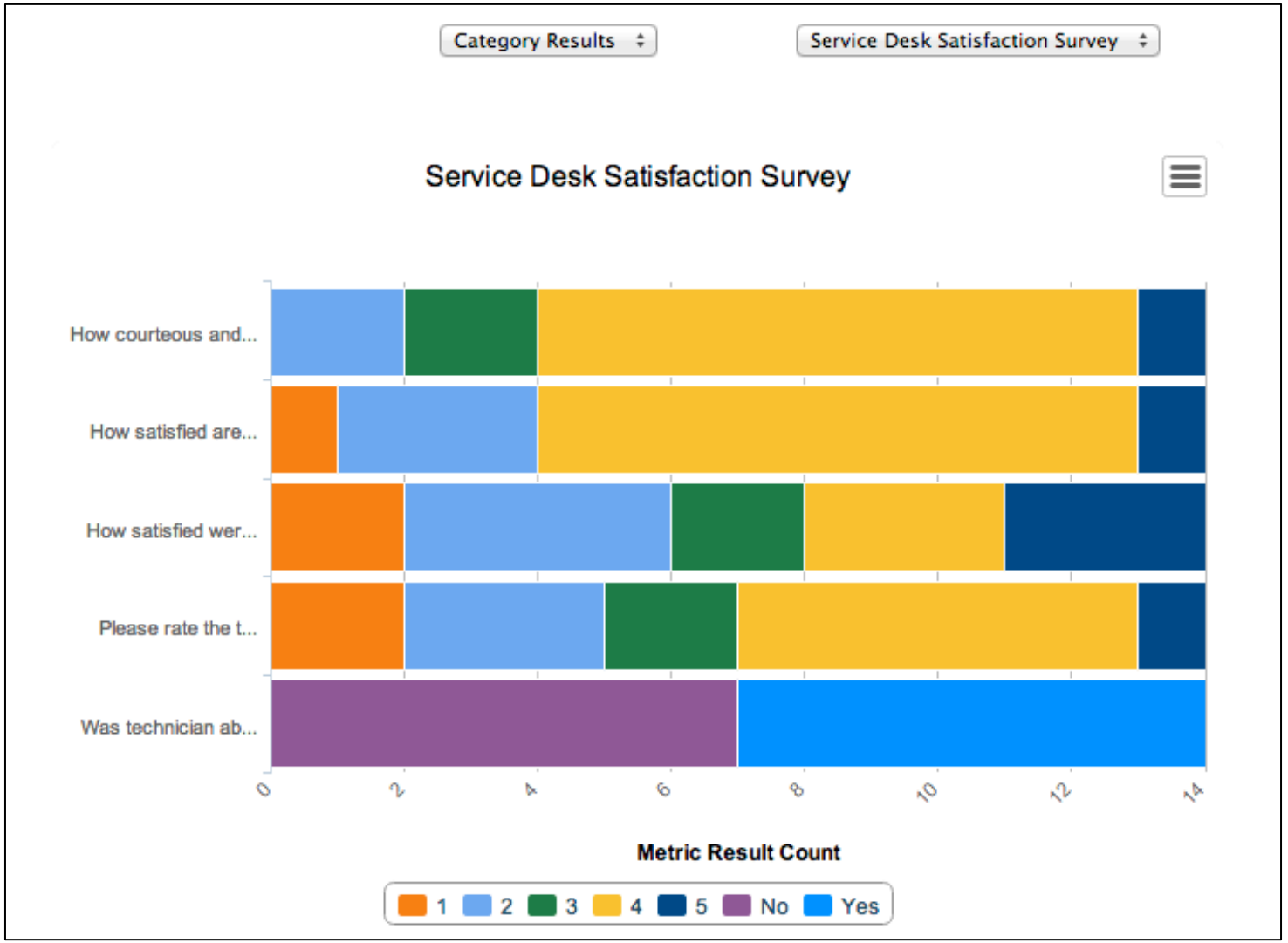
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Survey Overview



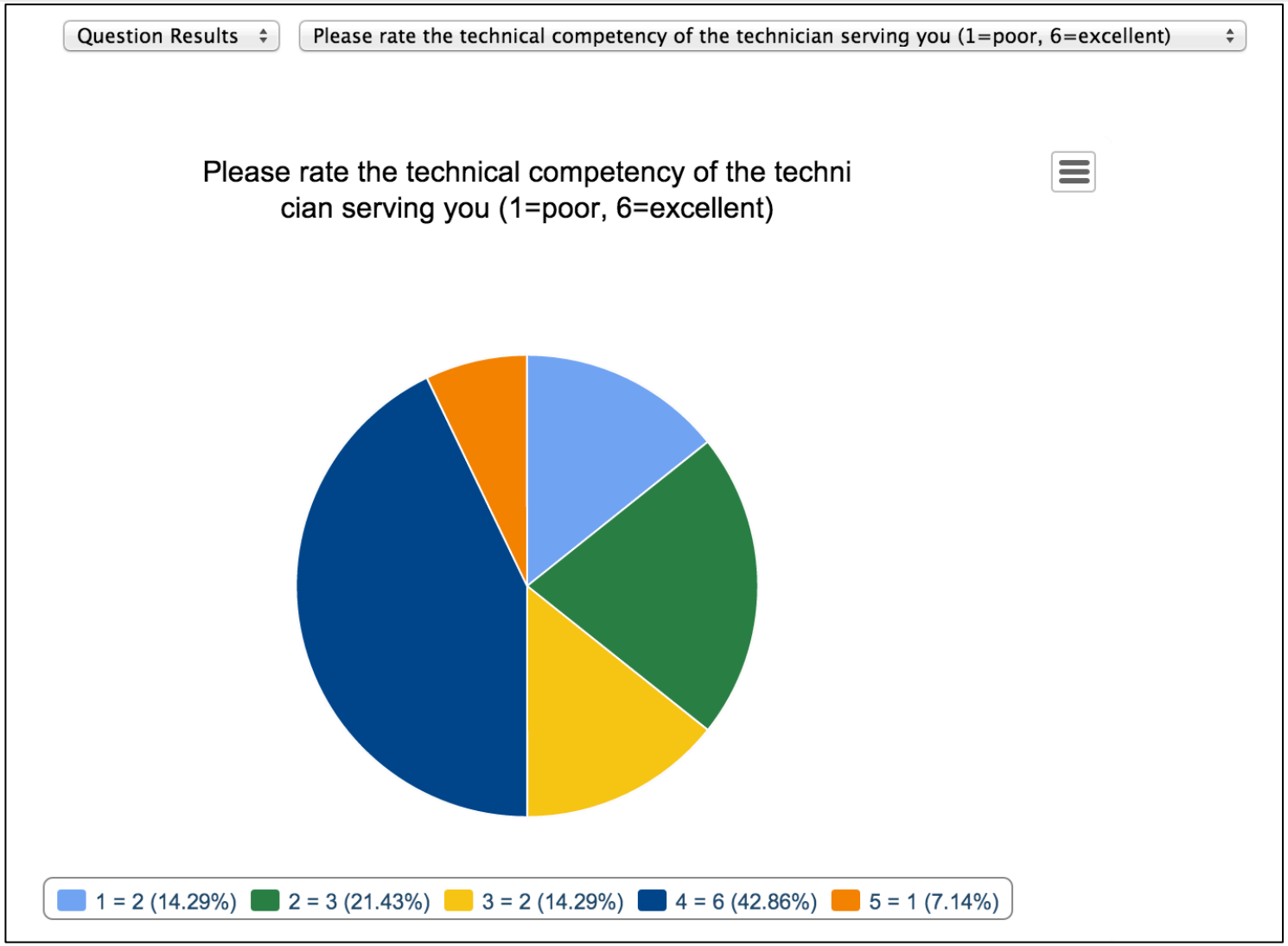
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Survey Scorecard: Question Results



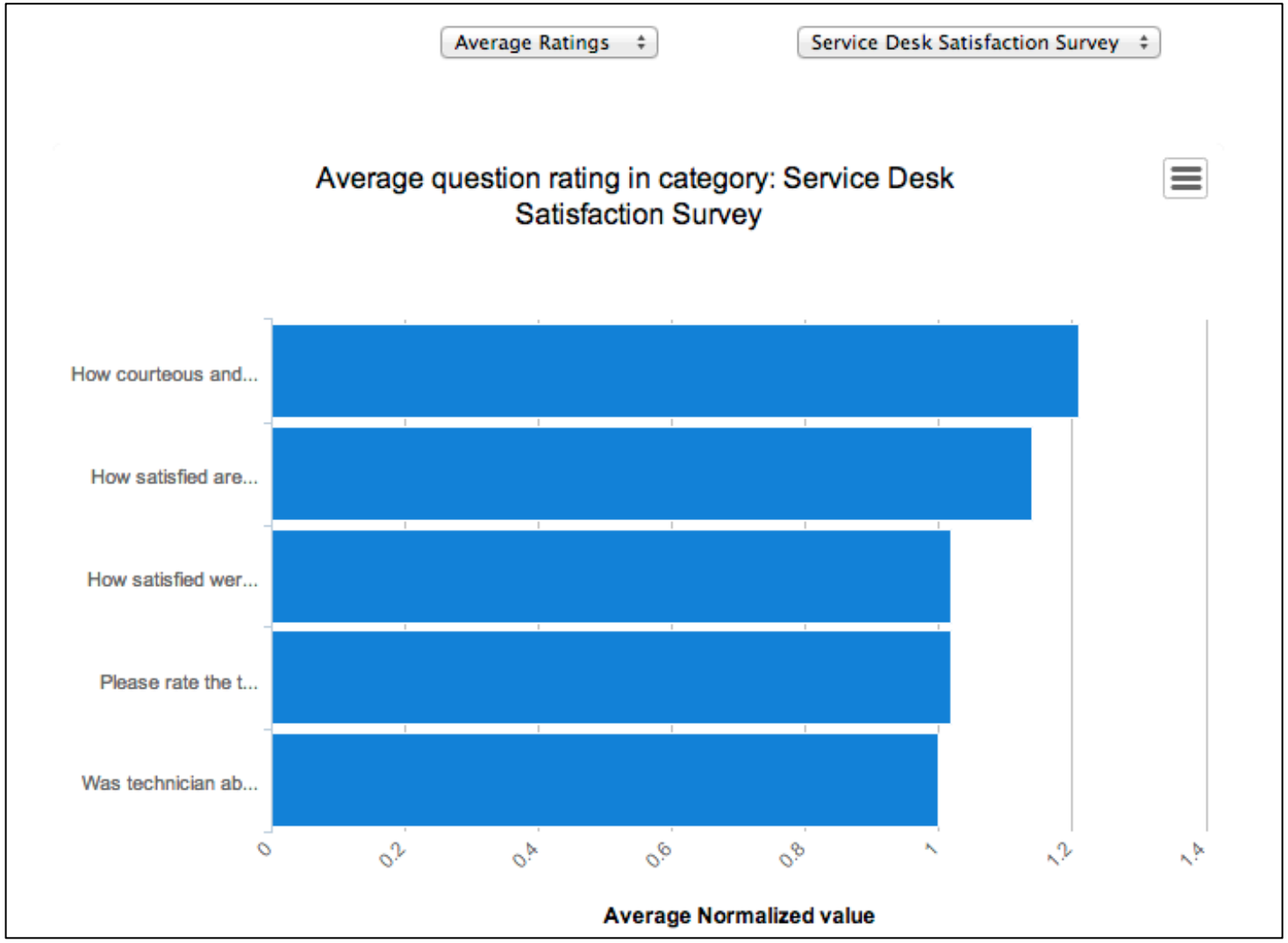
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Survey Scorecard: Question Pie Chart



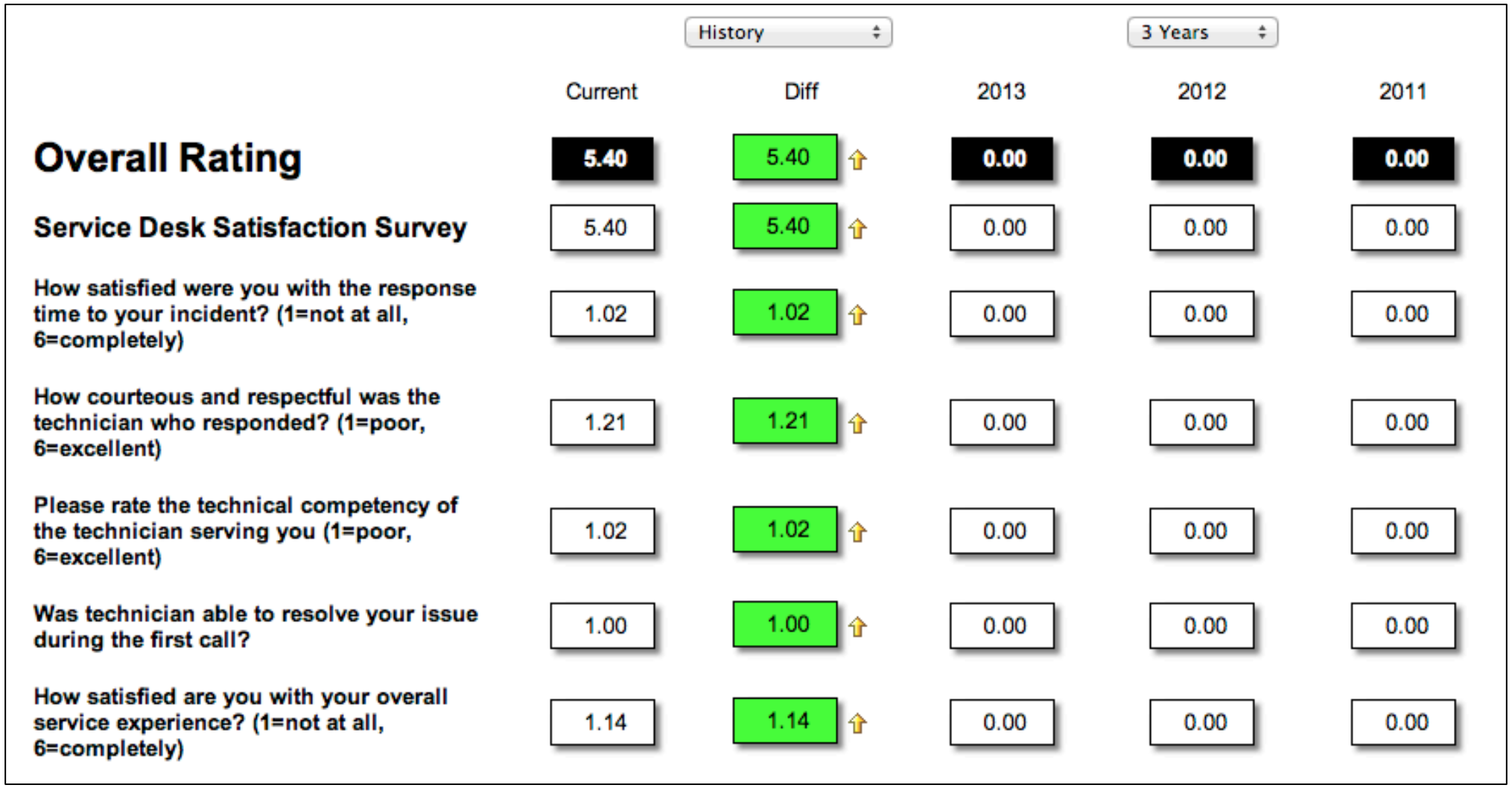
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Survey Scorecard: Ratings



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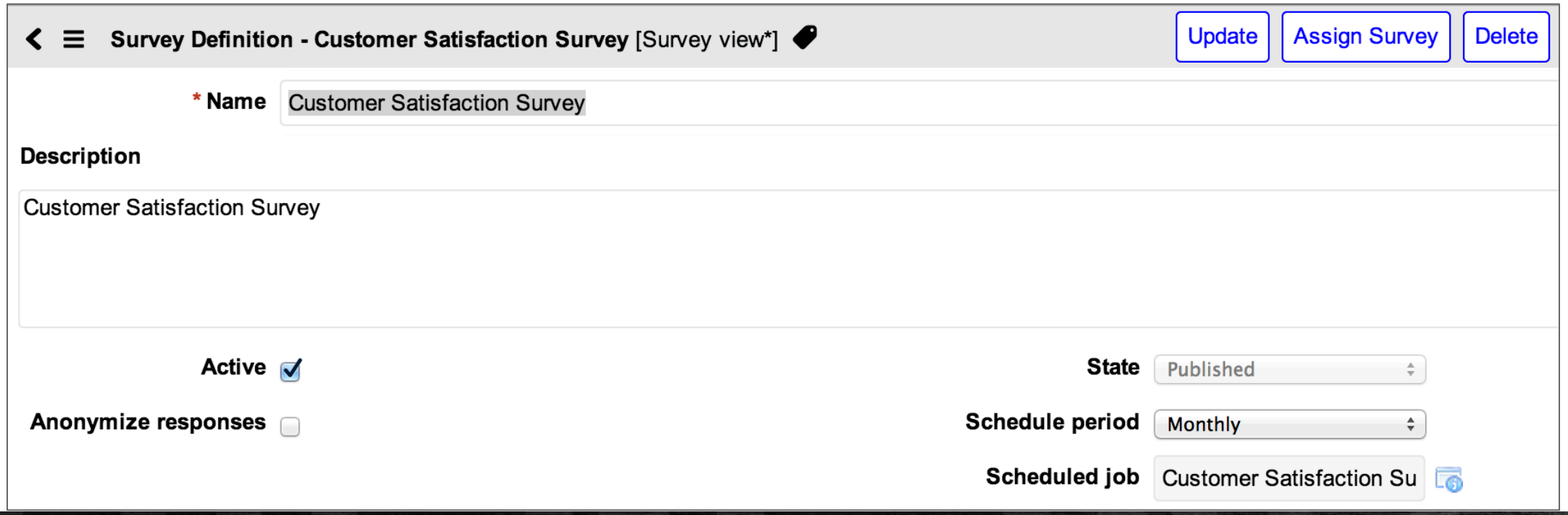
Survey Scorecard: History



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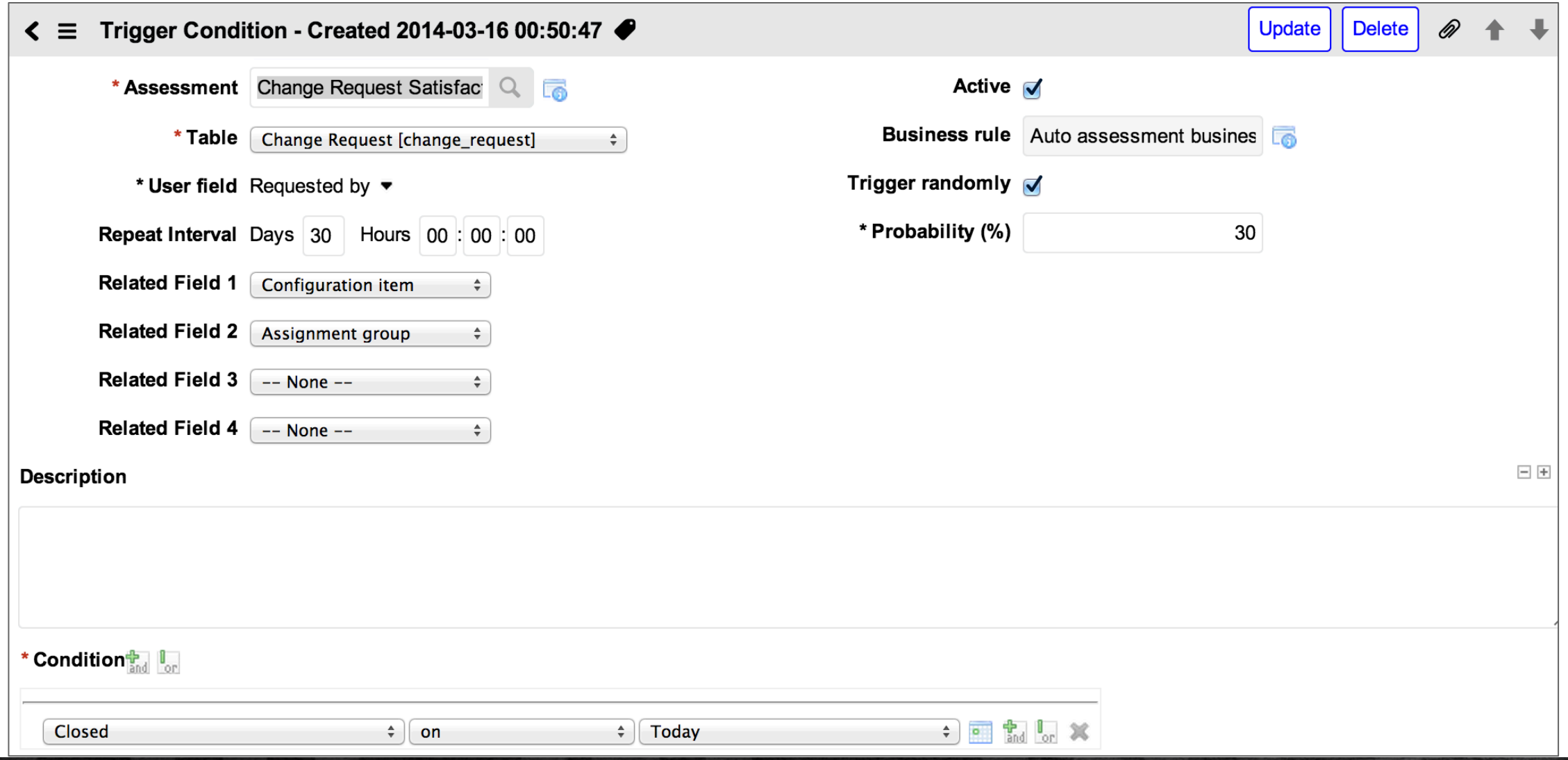
Periodic Surveys

- Available schedule periods are Only Once, No Limit, Daily, Weekly, Monthly, and Yearly
- When you set the schedule period to anything but Only Once or No Limit, the system automatically creates a corresponding scheduled job
- Schedule periods are enforced by a field on the survey instance, Expiration date. As long as the instance's expiration date has not passed, the assigned user cannot receive a new instance



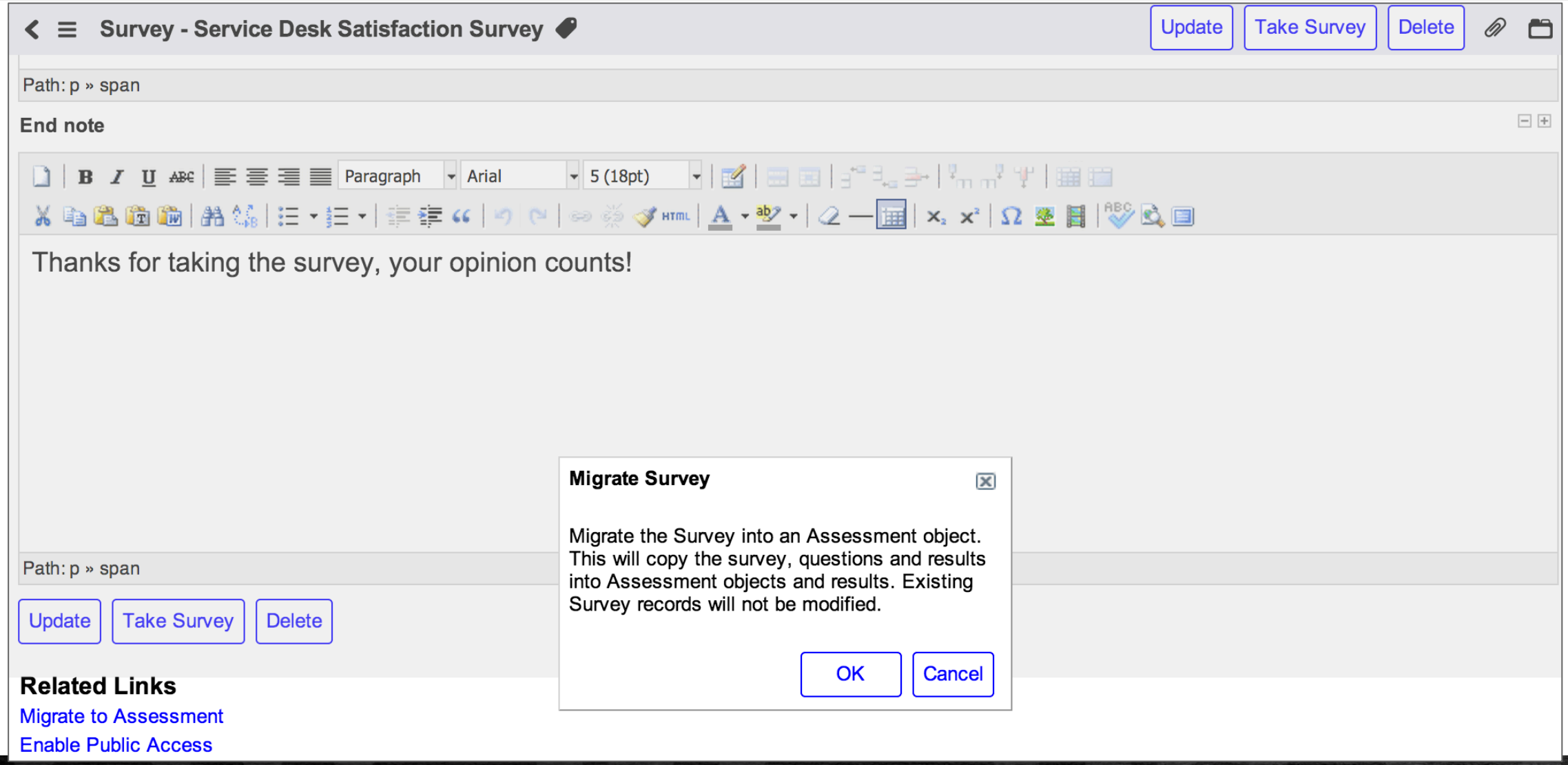
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Triggered Surveys



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Migrating Legacy Surveys' Questions and Results



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Migrating Legacy Surveys: Datatype mapping

Legacy Survey Type	Migrated to Data Type
Break	N/A
Date	Date
Date/Time	Date/Time
HTML	N/A
Label	N/A
List Collector	N/A
Lookup Multiple Choice	N/A
Macro	N/A
Macro with Label	N/A

Legacy Survey Type	Migrated to Data Type
Multi Line Text	String (**Multiline**)
Multiple Choice	Likert Scale
Numeric Scale	Number
Reference	N/A
Select Box	Choice
Single Line Text	String (**Single line**)
UI Page	N/A
Wide Single Line Text	String (**Single line wide**)
Yes / No	Yes / No

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Best Practices

- Assessment-based surveys are available in the base system and replace legacy surveys starting with Eureka
- Legacy survey functionality and data is preserved on the original tables. However, the recommended course of action is to migrate legacy surveys to the assessment-based survey platform
  - Survey conditions are not migrated; recreate them using trigger conditions
- Concurrent use of both survey features can lead to confusion and redundancy
- You can create your own templates for radio-button questions

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Surveys: Vocabulary Review

- Survey Definition
  - A survey definition is the root record upon which a survey is built and contains information like the survey name, state, and distribution schedule. It is comparable to the survey master in legacy surveys.
- Survey Category
  - A survey category represents a theme for survey questions. Categories contain one or more questions.
- Survey Question
  - A survey question corresponds to an assessment metric. It belongs to a survey category.
  - Several question datatypes are available: checkbox, choice, date, date/time, Likert scale, number, percentage, string, template, Yes/No
- Survey User
  - A survey user is a user who is associated with a survey definition and who is authorized to receive invitations for the survey. Survey administrators can manually invite other users to take surveys.

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Surveys: Vocabulary Review

- Survey Instance
  - A survey instance represents one survey questionnaire assigned to one user.
- Trigger Condition
  - A trigger condition enables the system to send a survey when an action occurs on a table, such as when an incident closes. Specified users such as incident callers receive survey instances.
- Scorecard
  - A scorecard provides a visual breakdown of survey responses. Use scorecards to view a variety of data summaries for one survey.

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Lab 1

Assessment-based Surveys

Legacy Survey Migration

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Assessments

Eureka Enhancements

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Assessments – Plugin and Role

- Plugin: Assessment
- Plugin dependency: Workflow Runtime Engine

- Role: assessment_admin
- Demo data users: *Bow Ruggeri, Carol Coughlin*

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How Do Assessments Work?

- Customers create groups of metrics which they can use to *evaluate any record in the system*
- Users can give more value to a category or metric by providing a weight
- Information collected via questionnaires or scripts
- Questionnaire and script results are translated into numeric results
- Scorecards and decision matrixes provide unique views into assessment results
  - Eureka addition: Bubble charts

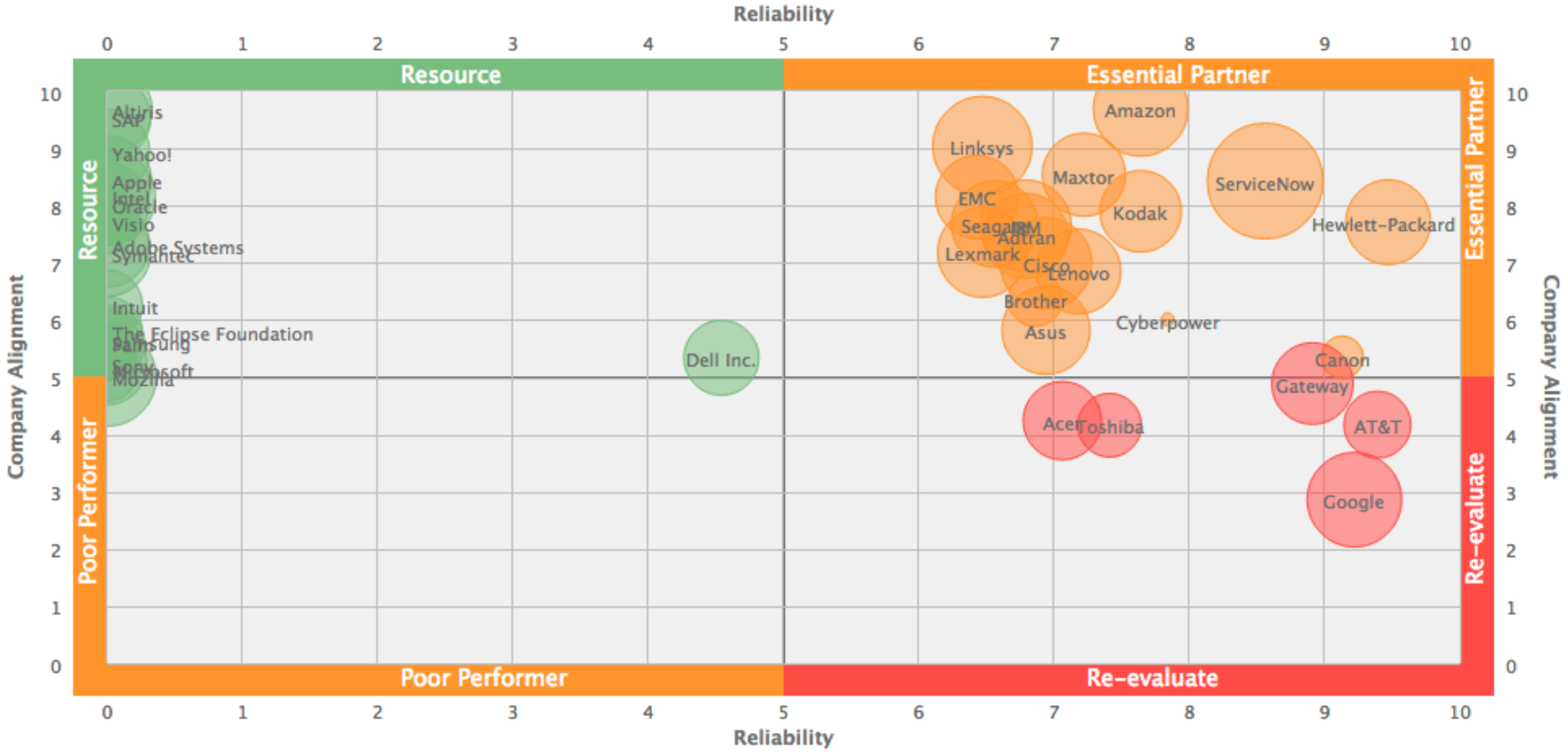
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Use Case Examples

- Product models
- Projects
- Processes
- Tech Support
- Vendors
- Software
- You name it…

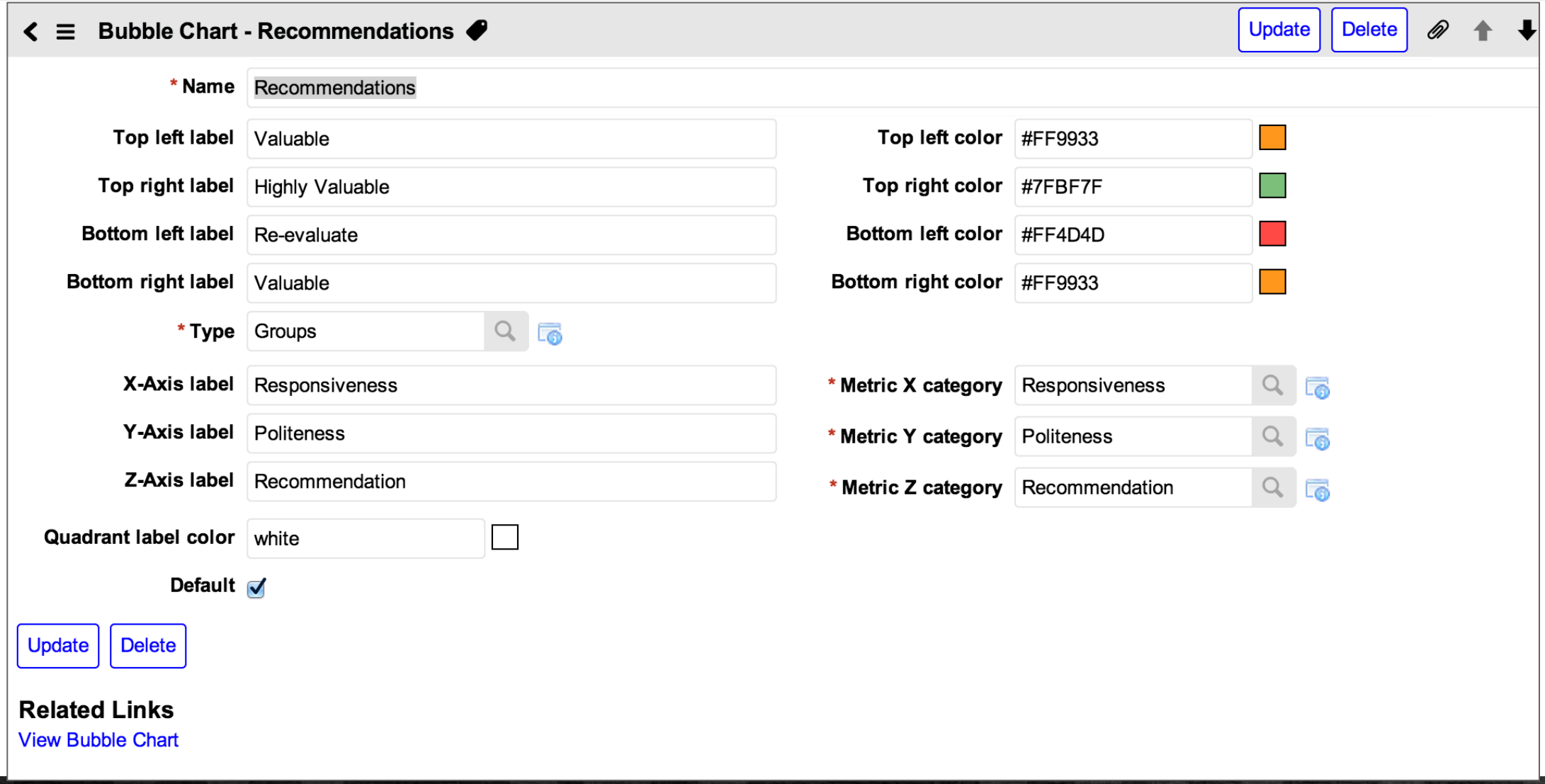
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Assessment Bubble Charts



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Bubble Chart Settings



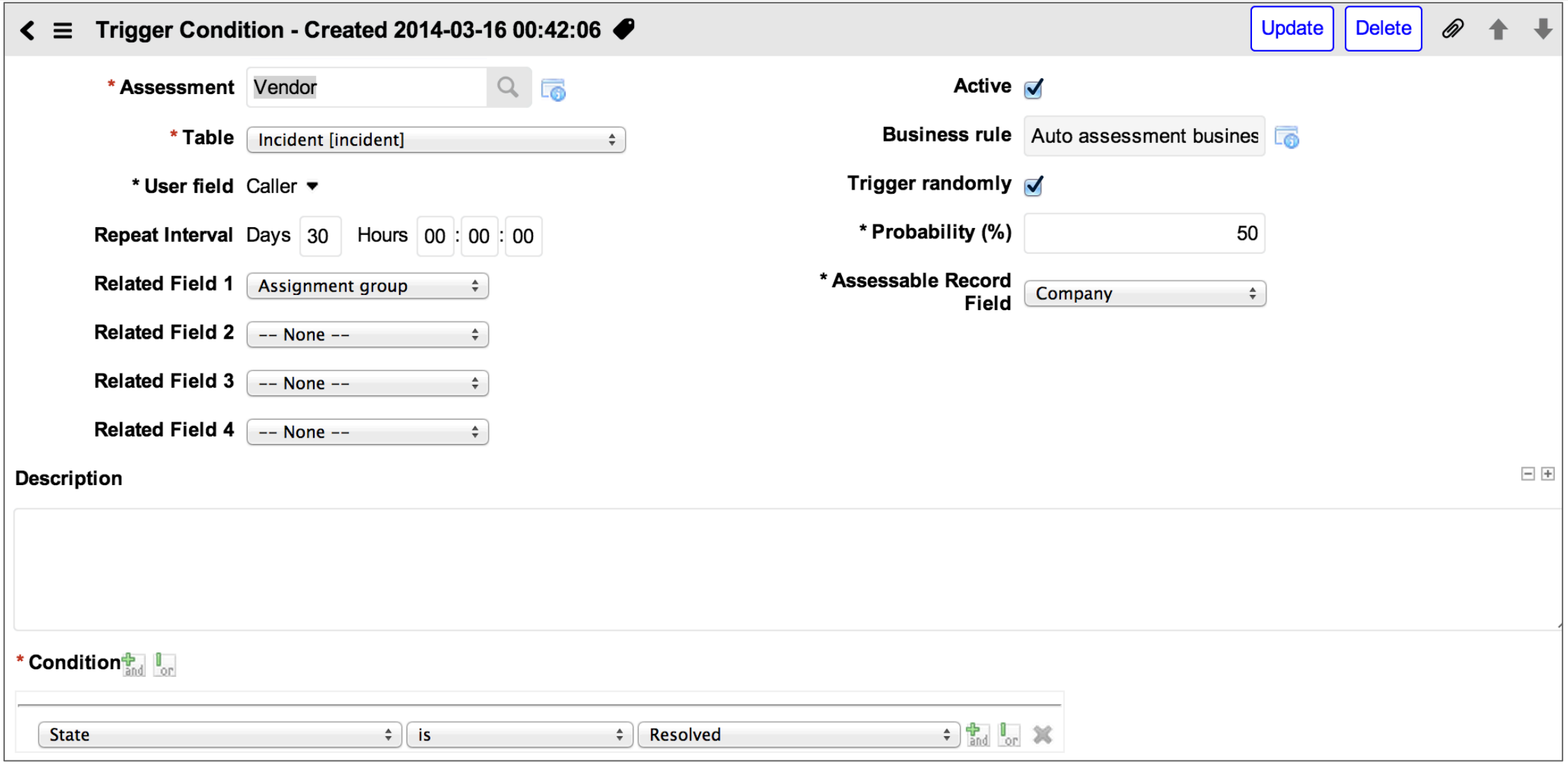
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Assessment Trigger Conditions

- With trigger conditions
  - Assessment administrators can configure the system to generate an assessment instance each time a specific action occurs on a given table, such as when an incident or change request closes
- The trigger condition
  - Monitors the table you choose and sends the selected assessment to specified users who are related to that table, such as incident callers or change request assignees
  - You can choose to send the assessment every time the condition is met, or set a probability for the system to send the assessment at random when the condition is met
  - The system generates an assessment instance assigned to the correct user when the condition is met

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Setting Assessment Trigger Conditions



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Assessments: Vocabulary Overview

- Metric type
  - Defines a set of assessable records, how often the assessment will run, who can see assessment information
- Category
  - Defines metrics that will be evaluated, who will answer questions, what subset of assessable records to evaluate (if applicable)
- Category User
  - Person who knows about a specific assessment category. Refer to stakeholders
- Metric
  - Defines a specific measurement to assess; can be collected via a questionnaire or automatically using a script
- Assessable record
  - Record in the system that has been promoted allowing it to be assessed
- Templates
  - Reusable Likert-scale question sets

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Assessments: Vocabulary Overview

- Stakeholder
  - Defines which user will answer questions in a category for a particular assessable
- Assessment result
  - Weighted result derived from a questionnaire response or a calculated metric
- Category result
  - Weighted roll-up of all assessment results under a category
- Assessment Scorecard
  - Visualization of historical assessment results for a single record
- Decision matrix
  - Visualization for comparing a group of records

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Lab 2

The Assessment Engine

Scripted Metrics

Bubble Charts

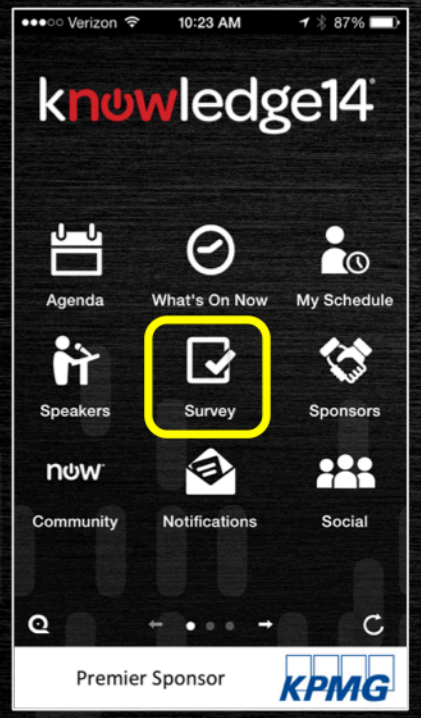
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Useful Resources

- Wiki: https://wiki.servicenow.com/index.php?title=Survey_Management
- Wiki: https://wiki.servicenow.com/index.php?title=Eureka_Assessments

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Thank You

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