HP Service Manager

Software Version: 9.41

For the supported Windows® and UNIX® operating systems

Survey help topics for printing

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Contents

Survey introduction

Prior to version 9.40, HP Service Manager allowed you to set up a scheduled survey only through survey integration. As of version 9.40, Service Manager additionally provides a Service Manager Survey tool, which enables you to implement email surveys in Service Manager independently without integration with third party survey tools. With this tool, you can either manually send a survey from a record, or set up scheduled surveys.

Service Manager Survey

The Service Manager Survey (SM Survey) feature is based on the HTML Email solution (JavaMail) and does not require an external survey tool to complete the survey process. You can manually send individual surveys directly form a record to selected users, or configure the system to automatically send scheduled surveys to specified users through an out-of box SM Survey connector.

When users receive a survey link, they can directly open the link in a web browser and then log in to Service Manager to complete the survey. They can also check the surveys opened for them or closed by them in the Service Manager portal. In the out-of-box system, SM surveys are designed to achieve the following goals:

- Collect user satisfaction ratings on the following areas: the level of service provided, the speed of response that the user received, and the level of communication rating from 1 to 5 regarding the service.
- Collect additional comments from the user (if any)
- Allow the user to select if a complaint or compliment needs to be registered. If the user selects to do so, the system automatically generates an interaction record of a Complaint or Compliment category with the information the user provided, and sends an email to the user with information about the interaction record. The user can click the record link to check the record details and status.

Note: SM Survey does not support Multiple Company mode.

Once the surveys are completed and submitted, the survey senders can check the survey results from the TO-DO queue or from the Survey menu on the system navigator. In addition to individual survey results, administrators can also check the statistics reports that the system automatically generates based on the existing survey results. All this can help your organization to improve your services and user satisfaction.

SM Survey setup

SM surveys fall into two categories: manual surveys and scheduled surveys. You need to configure the two types of SM surveys differently.

Common configurations

Both types of SM surveys require the following configurations:

- The HTML Email solution must be set up. For details, see "Set up HTML Email for SM surveys" below.
- The web tier URLs must be set up in the System Information Record. This is because both types of SM surveys use the web tier URLs (index.do or ess.do) in the survey links that are sent to the recipients. For details, see "Configure web tier URLs for SM surveys" on the next page.

Once these configurations are ready, you can send manual SM surveys from a record by selecting the **Send Survey** option. However, scheduled SM surveys require additional configurations.

Additional configurations for scheduled SM surveys

Scheduled surveys are based on the survey integration framework, and therefore require the following additional configurations:

- A survey integration instance is set up and enabled in Integration Manager. For details, see "Enable a survey integration instance" on page 11.
- Desired recipients are predefined in the SM Survey connector. For details, see "Configure the survey recipients" on page 31.
- A survey definition for each supported module is created based on the SM Survey connector. For details, see "Create an SM survey for a module" on page 11.

  You can create an SM survey for each of the following modules: Change, Configuration Item, Interaction, Incident, Request, and Problem.

Set up HTML Email for SM surveys

User roles: System Administrator

For the SM Survey feature to work, you need to set up HTML Email (JavaMail) by configuring the required emailout parameters. For more information about the emailout parameters, see "Emailout parameters in the sm.ini file" on page 1.

To set up HTML Email, follow these steps:

1. Navigate to the RUN folder of the Service Manager server.

2. Open the sm.cfg file in a text editor, and add the emailout parameter in the file:

   ```
   sm -emailout
   ```

3. Open the sm.ini file in the RUN folder, and add the following emailout parameters:

   ```
   smtphost:smtp3.mycompany.com
   smtpport:25
   mailFrom:sender@mycompany.com
   ```

   Where: **smtphost** is the name of the SMTP server host for client requests, **smtpport** is the communications port that the SMTP server uses, and **mailFrom** is any email address that you want to appear as the sender in the survey emails. The **mailFrom** parameter must use an email address format, but does not have to be a real email address.

   Tip: Instead of configuring the parameters in the two configuration files, you can also configure all of these emailout parameters in the sm.cfg file:

   ```
   sm -emailout -smtphost:smtp3.mycompany.com -smtpport:25 -
   mailFrom:sender@mycompany.com
   ```

4. Save the files and restart the Service Manager server.

   Next, you need to configure the Service Manager web tier URLs in the System Information Record if you have not already done so. For details, see "Configure web tier URLs for SM surveys" below.

Configure web tier URLs for SM surveys

User roles: System Administrator

SM surveys are sent to recipients with survey links, which includes the Service Manager web tier URL (ess.do). For this reason, you must configure the web tier URLs in the System Information Record.

To configure the web tier URLs, follow these steps:

1. Click **System Administration** > **Base System Configuration** > **Miscellaneous** > **System Information Record**.

2. Click the **Active Integrations** tab.

3. In the **WebServer URL** field, type the fully qualified index.do URL to your web tier. For example:

   `http://myserver.mydomain.com:myport/SM/index.do`

4. In the **ESS URL** field, type the fully qualified ess.do URL to your Web tier. For example:

   `http://myserver.mydomain.com:myport/SM/ess.do`

5. Save the system information record.

6. Restart the Service Manager server.

   If you have already set up HTML Email, now users can send surveys from a record by using the **Send Survey** option from the **More** menu.

   However, to enable the system to automatically send scheduled surveys, additional configurations are needed:

   "Enable a survey integration instance" below

   "Create an SM survey for a module" below

Enable a survey integration instance

User roles: System Administrator

Scheduled SM surveys are based on the survey integration framework. The major difference between the scheduled SM Survey feature and the survey integration is that the former uses an SM Survey connector while the latter uses an connector for an external survey tool. They both require a survey integration instance be set up and enabled in the Integration Manager and the survey service agent scheduler be started in System Status.

For detailed steps, see "Create a Survey Integration instance " on page 19.

Create an SM survey for a module

You can create a survey definition for scheduled SM surveys applicable to any of the following modules: Change, Configuration Item, Interaction, Incident, Request, and Problem.

To create a new scheduled SM survey for a module, follow these steps:

1. Click **Service Desk** > **Survey Management** > **Create Survey** in the system navigator to display the Create a New Survey wizard.

2. Select **Internal Connector** from the connector list.

3. Select the Service Manager module on which the survey will be based from the **Object** drop-down list. For example, select **Interaction**.

4. Select an assignment group in the **Owner Group** field. For example, select **Coordinator**.

5. In the **Name** field, enter a descriptive name for the survey.

6. Click **Finish** to display the survey definition record.

7. (Optional) Enter a description for the survey definition as needed.

8. Configure the scheduling rules as described below.
   a. Select a **Sending Interval** value. For example, select **Daily**.

   b. In the **Active From** and **To** fields, specify a future time period during which the survey definition will be active.

9. In the **User Selection Rules** section, select one or more rules. For example, select **Randomly select 10% users as survey recipients**.

10. Specify a predefined filter. For example, select **Closed interactions since last processing**.

    You can define custom filters. For details, see "Create an additional filter" on page 30 in the Survey Integration section.

11. In the **Recipients** section, select recipients for the survey definition. For example, select **Contact**.

    An available recipient here is actually a mapping field in the corresponding DBDICT record, which is defined in the Internal Connector and can be either the group or the person type. To view or update the out-of-box recipient setting, follow these steps:

    a. Go to **System Administration** > **Ongoing Maintenance** > **Survey** > **Survey Connectors**, and open the **Internal Connector** through a search.

    b. Browse to the **Recipients and Parameters** section and add new parameters as needed. For example, in the out-of-box system, for Interactions, recipient **Contact** is mapped to the **callback.contact** field in the **incidents** DBDICT record, which is the **Contact** field in the interaction detail form. For more information about how to add a new recipient for a module, see "Create a new recipient" on page 23.

12. In the **Email Settings** section, manually configure your email template or click **Select HTML Template** to select an existing one. Service Manager provides an out-of-box HTML template as **Internal Survey Template**. In the **Test Record** field, enter an existing record ID (for example, `SD10002`), and click **Preview** to make sure the template satisfies your needs.

13. Click **Back** to return to the survey definition.

14. Click **Add Translation** if you want to add a localized version of the email template. For details, see "Create a localized email" on page 32.

15. (Optional) In the **Parameters** section, click the **Optional** tab to add your own parameter mappings.

    Parameters are predefined values that provide surveys in HP Service Manager with the correct metadata. You can create additional parameters that are mapped to specific fields in the module.

16. Click **Save** to create the survey definition.

SM Survey administrator tasks

The scheduled SM Survey feature shares the same framework as the survey integration. Most of the administrator tasks are the same as those for the survey integration. See the following topics in the Survey Integration section.

"Configure the global survey settings" on page 20

"Create a new parameter" on page 22

"Create a new recipient" on page 23

"Create a predefined filter" on page 23

The following administrator tasks are only for scheduled Service Manager Survey.

"Design your own SM Survey questionnaire" on the next page

"Tailor the SM Survey template" on the next page

"Manage the self-service survey menu" on page 15

Design your own SM Survey questionnaire

User roles: System Administrator

In the out-of-box system, the following questions are provided for SM surveys:

1. Overall, how satisfied are you with the level of service provided (1 - "Very Unsatisfied" and 5 - "Very satisfied")?

2. How satisfied are you with the speed of response that you received (1 - "Very Unsatisfied" and 5 - "Very satisfied")?

3. How satisfied are you with the communication regarding the service (1 - "Very Unsatisfied" and 5 - "Very satisfied")?

4. Do you have any additional comments?

These four out-of-box questions are defined in the SurveyInternal table. However, you may need to update the questions according to your business needs. To tailor your own survey questions and options, follow these steps:

1. Add new fields in the SurveyInternal dbdict record.

2. Modify the corresponding SurveyInternal format.

You can also add verification to a question, and Service Manager will verify if the recipients have answered this question when they submit the survey. For the four out-of-box questions, Service Manager adds verification to the first three questions. If you want to add verification to your new questions, update the SurveyInternal format control and then make sure this question is marked with an asterisk (*) when you design the corresponding format in the Forms Designer.

Tailor the SM Survey template

User roles: System Administrator

When you manually send a survey from a record, an SM Survey template is applied to generate the default subject and message body. You can tailor the content in the template or use your own template to replace the default SM Survey template.

To tailor the default SM Survey template, follow these steps:

1. Click **Tailoring** > **Notifications** > **HTML Templates**.
2. Enter **Internal Survey Template** in the Name field and click **Search**.
3. Update the survey template content based on your requirements.
4. Click **Save** to save the updated template.

To replace the default SM Survey template, follow these steps:

1. Click **Tailoring** > **Notifications** > **Notifications**.
2. Enter **Send Survey** in the Name field and click **Search**.
3. In the Arguments column corresponding to the HTMLTemplate class, replace the string "Internal Survey Template" in the jscall function with your new template name. You need to make this update in both the **Message** and the **Email/Mail Subject Line** tabs.
4. Click **Save** to save the updated notification definition.

Manage the self-service survey menu

User roles: System Administrator

SM Survey menu is added to out-of-box self-service menus, which allows an end user to view and complete an SM survey. You can update an operator record to grant survey access by assigning the ESSSM-Survey self-service menu.

There are multiple self-service menus available, you can choose to assign only the SM Survey menu to an operator. To do this, follow these steps:

1. Click **System Administration** > **Ongoing Maintenance** > **Operators**.
2. Type or select the optional search criteria.
3. Click **Search**.
4. Select an existing operator record.
5. Click the **Self Service** tab. Make sure that the operator record has these settings:

- The **Self Service Access Only** check box must be selected.
- Select or type **ESSM-Survey** in the **Self Service Menu** field. In this way, the SM Survey menu is displayed when this user logs on using a self-service URL.

6. Click **Save**.

SM Survey user tasks

Once the SM survey feature is set up, users can perform the following tasks.

"Send a survey from a record" below

"Respond to an SM survey" on the next page

"Check my SM surveys" on page 18

Send a survey from a record

User roles: users

Once your administrator has set up HTML Email and configured the web tier URLs in the System Information Record, you can manually send a survey from a record at any state in one of the following modules:

- Interaction
- Request
- Incident
- Problem
- Change
- Configuration Item

To manually send an SM survey from a record, follow these steps:

1. Open a record. For example, open an interaction record.
2. Click **More** > **Send Survey** to display the **Manual Customer Survey** interface.

3. Click Fill to select one or more recipients from the list.

4. Click **Send** to send the survey to the selected recipients.

   > **Note:** If you type an email address instead of selecting a recipient from the list, Service Manager sends a survey email to the corresponding user. If no corresponding user is found, Service Manager sends the email directly to this email address.

The specified recipients receive an email notification, which contains a survey link and instructions on how to respond to this survey.

Respond to an SM survey

User roles: users

If you receive an email notification inviting you to respond to an SM survey, follow the instructions to view and respond to the survey.

To view and respond to an SM survey, follow these steps:

1. Open the survey link in a web browser.

   The Service Manager login screen appears.

2. Log in to Service Manager.

3. Click **Survey** > **View Open Surveys**.

4. Click the survey number to open the survey.

5. Select your answers to the survey questions.

6. (Optional) Enter additional comments.

7. (Optional) Click **Register a compliment** or **Register a complaint**.

   If you select either option, the system will automatically create an interaction record that has a category of Compliment or Complaint and send you another email with the record details after you submit the survey. By default, the **No interaction registration** option is selected.

8. Click **Submit Survey**.

   The survey now appears in your list of closed surveys (**Survey** > **View Closed Surveys**).

Check my SM surveys

User roles: users

You have two ways to check your SM surveys, including those that you have sent out and those that you have responded to.

To check your SM surveys from the TO-DO queue, follow these steps:

1. From the TO-DO queue, select **Internal Survey**.
2. Select a desired SM survey view.

To check your SM surveys from the navigator, follow these steps:

1. Click a survey link in the email your received, and log in to Service Manager.
2. Click **Survey** from the system navigator and then select **View Open Surveys** or **View Closed Surveys**.

Survey Integration

HP Service Manager Survey integration enables you to effectively configure and manage the surveys in your organization.

Survey Integration includes three integration methods (connectors) that enable you to integrate Service Manager with third-party survey tools.

Create a Survey Integration instance

Before you can create and configure surveys in HP Service Manager Survey Integration, you must create a survey integration instance. Survey Integration only requires one survey integration instance, even if you have multiple surveys. Once you have created a survey integration instance, you cannot create a second one.

To create a survey integration instance, follow these steps:

1. In the System Navigator, click **Tailoring** > **Integration manager** > **Add**.
2. Select **SMSurvey** from the **Integration Template** drop-down list, and then click **Next**.
3. Populate the **Interval Time** and **Max Retry Times** fields.
4. Click **Next** four times or until the Survey Integration instance is created.
5. Click **Enable** to enable the integration.

Note: Additionally, you must ensure that the survey service agent scheduler is started after you create the instance.

Survey administrator tasks

This section introduces administrator tasks for survey integration.

Configure the global survey settings

The System Administrator can configure a number of settings that apply to every survey in HP Service Manager scheduled SM survey and Survey Integration. To view and configure these settings, click **System Administration** > **Ongoing Maintenance** > **Survey** > **Survey Settings**.

The Survey Settings form contains the following configurable attributes.

Attribute	Description	Notes
Additional Filter Configuration Item form	The form that is used to filter additional records against the device table. You can create your own forms that have the filter fields you require.	This attribute is mandatory.
Additional Filter Change form	The form that is used to filter additional records against the cm3r table. You can create your own forms that have the filter fields you require.	This attribute is mandatory.
Additional Filter Incident form	The form that is used to filter additional records against the probsummary table. You can create your own forms that have the filter fields you require.	This attribute is mandatory.
Additional Filter Problem form	The form that is used to filter additional records against the rootcause table. You can create your own forms that have the filter fields you require.	This attribute is mandatory.
Additional Filter Interaction form	The form that is used to filter additional records against the incidents table. You can create your own forms that have the filter fields you require.	This attribute is mandatory.
Link for copy (default: SurveyDefinition.copy)	Enables you to specify a link to decide which fields are copied from the source to the target record.	
Default language	The language in which the survey email is sent when no localized version is available in the recipient's language.	This attribute is mandatory.
HTML format for email body	Specifies the form that contains the HTML email body.	This attribute is mandatory.

Attribute	Description	Notes
Plain text format for email body	Specifies the form that contains the plain text email body.	This attribute is mandatory.
Use HTML emails	When this option is selected, the HTML editor is displayed in the survey definition record. If the option is not selected, a plain text editor is displayed instead.	
Use HTML templates	When this option is selected, HTML templates are available to help you create survey emails.	

Create a new survey connector

In addition to the out-of-box survey connectors, you can create new survey connectors in HP Service Manager Survey Integration. To do this, follow these steps:

1. In the system navigator, click **System Administration** > **Ongoing Maintenance** > **Survey** > **Survey Connectors** > **New** to display a blank connector form. The **ID**, **Last Updated by**, and **Last Update time** fields are populated automatically.

2. Click to clear the **Active** checkbox if you do not want the new survey connector to be displayed in the list of available survey connectors when you create a new survey.

3. Select a connector type from the drop-down list in the **Type** field.

4. Type a name for the connector in the **Name** field.

5. Type a description of the connector in the **Description** field.

6. Click **Save** to save the connector. The **Parameters and Recipients** section of the form is displayed.

Search for a survey connector

To search for an existing survey connector in HP Service Manager, follow these steps:

1. In the system navigator, click **System Administration** > **Ongoing Maintenance** > **Survey** > **Survey Connectors**.

2. Use the search form to specify search criteria. For example, in the **Type** drop-down list, select **Send**

emails with a survey link.

3. Click **Search** to display the list of records that match your search criteria.

> **Note:** If Service Manager generates a message that states no records were found, you can broaden the search by eliminating some search parameters.

Create a new parameter

Parameters are predefined values that provide surveys in HP Service Manager with the correct metadata. Survey Administrators can create additional parameters that are available to survey users when they configure a survey connector. Parameters are associated with specific Service Manager modules.

To create a new parameter, follow these steps:

1. Open a survey connector by creating a new connector or by searching for an existing connector.
2. Browse to the **Parameters and Recipients** section, and then expand the Service Manager module to which you want to add a parameter.
3. Expand **Parameters**, and then click **Add Parameter** to display the Survey Parameter Mapping form. The **ID**, **Connector ID**, **Last update time**, **Last updated by**, and **Object** fields and the **Active** check-box are populated automatically.
4. Type a user-friendly description of the parameter in the **Description** field.
5. Type the internal name for the parameter in the **Parameter Name (Internal)** field.
6. Select the order in which the parameter is processed in the **Order ID** field (this step applies only to API-based connectors).
7. Select a mapping type from the **Mapping Type** drop-down list.
8. Type a constant value, variable, field name, or RAD expression in the **Mapping Value** field, and then click **Save**.

Create a new recipient

Survey Administrators can create predefined recipients that are available to survey users when they assign recipients to a survey in HP Service Manager. Recipients are associated with specific Service Manager modules.

To create a new recipient, follow these steps:

1. Open a survey connector by creating a new connector or by searching for an existing connector.
2. Browse to the **Parameters and Recipients** section, and then expand the Service Manager module to which you want to add recipients.
3. Expand **Recipients**, and then click **Add Recipient** to display the Survey Recipients Configuration form. The **ID**, **Connector ID**, **Last update time**, **Last updated by**, and **Object** fields and the **Active** check-box are populated automatically.
4. Type a user-friendly description of the recipient in the **Description** field.
5. Type the internal name for the recipient in the **Parameter Name (internal)** field.
6. Select a mapping type from the **Mapping Type** drop-down list.
7. Select a recipient type from the **Recipient Type** drop-down list.

   Note: If you select **Group** as the recipient type, you must also select values from the **Group** and **Subgroup** drop-down lists.

8. Type a constant value, variable, field name, or RAD expression call in the **Recipient(s)** field, and then click **Save**.

Create a predefined filter

Data filters enable you to configure which records in the database are selected to be recipients of HP Service Manager survey requests. Survey Administrators can create predefined filters, which are available for survey users to choose from, by creating views in Service Manager.

To create a view to use as a predefined filter, follow these steps:

1. In the system navigator, click **System Administration** > **Base System Configuration** > **Miscellaneous** > **Views/Favorites** > **New**.
2. Select an object from the **Area** drop-down list, and then click **Next**.
3. Type a name in the **Name** field, select a view type from the **View type** drop-down list, and then click **Next**.
4. Select the **Selected Groups** option, click to select the **Survey** group, and then click **Next**.
5. Configure the parameters for the view, and then click **Finish**.

To ensure the survey solution can filter for records that are exclusively related to data the survey, the "@FieldName@" directive is added to the filter queries. When the query is run, the directive is replaced by the value in the specified field. For example, the following query filters for records that were closed since the last survey run:

```
close.time>@lastProcessingTime@
```

Note:

- Ensure that you configure the predefined filter so that the system can process all the records within the configured send interval.
- The filter results must be ordered correctly to ensure that the required users are surveyed. This is because Survey selects records in the order in which they appear in the database after a query is run.

Survey user tasks

This section introduces the Survey Integration user tasks.

Create a survey from menu

To create a new survey in HP Service Manager Survey Integration, follow these steps:

1. Click **Service Desk** > **Survey Management** > **Create Survey** in the system navigator to display the Create a New Survey wizard.

2. If there is more than one survey connector, select a survey connector from the list. The **Connector type** field is populated automatically, based on your choice of connector.

3. Select the Service Manager module on which the survey will be based from the **Object** drop-down list.

4. Enter values in the **Owner Group** and **Name** fields.

5. Click **Finish** to display the survey definition record.

6. Populate all the mandatory fields in the survey definition record to configure the survey. For more information about how to configure a survey, refer to the "Related tasks" section.

7. Click **Save** to create the survey record.

Search for a survey

To search for an existing survey definition record in HP Service Manager Survey Integration framework, follow these steps:

1. In the system navigator, click **Service Desk** > **Survey Management** > **Search Surveys**.
2. Use the search form to specify search criteria. For example, in the **Current Phase** field, select **retired**.
3. Click **Advanced Filter** to create custom filters. To create new search criteria, follow these steps:
   a. Click **Add New Filter Criteria**.
   b. Populate all the fields as required, and then click **Next** to add the criterion to the **Conditions** list.
   c. Click **Add New Compound** to add a compound rule to a filter that has more than one criterion.
4. Click **Search** to display the list of records that match your search criteria.

   > **Note:** If Service Manager generates a message that states no records were found, you can broaden the search by eliminating some search parameters.

Configure the survey header

The **Header** section of the survey management form in HP Service Manager Survey Integration contains the survey metadata. The content of the section is dependent on whether the survey uses a URL-based or API-based connector.

Surveys that use a URL-based connector

To configure the survey header of a survey that uses a URL-based connector, follow these steps:

1. Open a survey definition record by creating a new survey or by searching for an existing survey.
2. The **Active** check-box and the following fields are populated automatically:
   - **ID**
   - **Object**
   - **Current Phase**
   - **Connector Type**

- **Owner Group**
- **Name**

3. Type a value in the **External Survey ID** field.
4. Type values in the **Owner** and **Description** fields, and then click **Save**.

Surveys that use an API-based connector

To configure the survey header of a survey that uses an API-based connector, follow these steps:

1. Open a survey definition record by creating a new survey or by searching for an existing survey.
2. The **Active** and **Keep Default Connection** check-boxes and the following fields are populated automatically:
   - **ID**
   - **Object**
   - **Current Phase**
   - **Connector Type**
   - **Owner Group**
   - **Name**
3. Type a value in the **External Survey ID** field.
4. Type values in the **Owner** and **Description** fields.
5. To create a custom connection to the survey solution, follow these steps:
   a. Clear the **Keep Default Connection** check-box to display the **Connection Parameters** sub-section.
   b. Type the URL, user name, and password that are required to connect to the survey solution.
6. Click **Save**.

Add an activity to the Survey Activities log

The **Activities** section of the survey definition record in HP Service Manager Survey Integration displays the major activities that are associated with the survey, and enables users to add an activity to the record. To add an activity, follow these steps:

1. Open a survey definition record by creating a new survey or by searching for an existing survey.
2. Scroll down to the **Activities** section.
3. Select the type of update that you want to add from the **New Update Type** drop-down list.
4. Type a description of the update in the **New Update** field, and then click **Save**.

Note: If numerous activities are recorded, you can restrict the number that are displayed. To do this, select a type of activity from the **Activity Type** drop-down list, and then click **Filter**.

Configure the survey scheduling rules

The **Scheduling Rules** section of the survey definition record in HP Service Manager Survey Integration enables you to configure the duration of the survey and how often survey requests are sent out.

1. Open a survey definition record by creating a new survey or by searching for an existing survey.
2. Scroll down to the **Scheduling Rules** section.
3. Select the interval at which survey requests are sent from the **Send Interval** drop-down list.

   Note: Survey Administrators can configure the options that appear in the Sending Interval drop-down list by modifying the SurveySendInterval types in the Code table. The value is in seconds.

4. Enter the survey start date in the **Active From** field.

   Note: This date cannot be in the past.

5. Enter the survey end date in the **To** field, and then click **Save**.

   Note: This date must be later than the date in the **Active From** field.

To configure a survey that runs one time only, follow these steps:

1. In the **Scheduling Rules** section of a survey definition record, set the **Send Internal** field to **Every hour**.

2. Set the **Active From** field to the start time that you require.

3. Set the **To** field to a time that is 10 minutes later than the time that you entered in the **Active from** field.

Note: If the time difference between the **Active From** and the **To** fields is less than 5 minutes, the survey may not run.

Filter the survey recipients

The **User Selection Rules** section of the survey definition record in HP Service Manager Survey Integration enables you to configure how often users are sent survey requests and the percentage of users that are sent a survey request. To filter the survey recipients, follow these steps:

1. Open a survey definition record by creating a new survey or by searching for an existing survey.

2. Scroll down to the **User Selection Rules** section.

3. Select one or more of the following options:
   - **Do not survey a user more than once in a survey cycle**

     When this option is selected, users who appear in the survey database more than once are not sent multiple survey requests.

   - **Do not send a user a new survey for <*time*>**

     When this option is selected, you can configure a period of time in which users are not sent new survey requests.

   - **Randomly select <*percentage*> % of users as survey recipients**

     When this option is selected, you can configure the percentage of users that are sent a survey request.

4. Click **Save**.

Apply a data filter to a survey

The **Data Filter** section of the survey definition record in HP Service Manager Survey Integration enables you to configure which records in the database are selected to be recipients of survey requests. The section comprises of predefined filters (that are managed by the Survey Administrator) and additional filters (that are user-generated). The two types of filter are connected with an AND operator.

To apply a data filter, follow these steps:

1. Open a survey definition record by creating a new survey or by searching for an existing survey.
2. Scroll down to the **Data Filter** section.
3. Select a predefined filter.
4. Create an additional filter, and then click **Save**.

Create an additional filter

Data filters enable you to configure which records in the database are selected to be recipients of in HP Service Manager Survey Integration survey requests. Additional data filters can be created by users to supplement the predefined data filters.

To create an additional data filter, follow these steps:

1. Open a survey definition record, and then browse down to the **Data Filter** section.
2. Click **Build Additional Filter** to display the Query Generator form.
3. Populate the appropriate fields with values to create the required filter.
4. Click **Advanced Filter** to create custom filters. To create new search criteria, follow these steps:
   a. Click **Add New Filter Criteria**.
   b. Populate all the fields as required, and then click **Next** to add the criterion to the **Conditions** list.
   c. Click **Add New Compound** to add a compound rule to a filter that has more than one criterion.
5. Click **OK** to display the additional data filter in the **Data Filter** section of the survey management form, and then click **Save**.

To ensure the survey solution can filter for records that are exclusively related to data the survey, the "@FieldName@" directive is added to the filter queries. When the query is run, the directive is replaced by the value in the specified field. For example, the following query filters for records that were closed since the last survey run:

```
close.time>@lastProcessingTime@
```

Configure the survey recipients

The **Survey Recipients** section of the survey definition record in HP Service Manager Survey Integration enables you to configure the recipients of survey requests. Recipients are defined in the survey connector, and are based on the specific Service Manager module to which the survey applies.

To configure the survey recipients, follow these steps:

1. Open a survey definition record by creating a new survey or by searching for an existing survey.
2. Scroll down to the **Survey Recipients** section.
3. Select a recipient from the **Available Recipients** box, and then click the right arrow to move the recipient to the **Selected Recipients** box.

   > **Note:** To remove a recipient from the **Selected Recipients** box, select the recipient, and then click the left arrow.

4. Click **Save**.

Configure the survey email settings

The **Email Settings** section of the survey definition record in HP Service Manager Survey Integration enables you to configure the email survey requests that are sent for surveys that use URL-based connectors.

To configure the email settings, follow these steps:

1. Open a survey definition record by creating a new survey or by searching for an existing survey.
2. Scroll down to the **Email Settings** section.
3. Type the URL of the external survey in the **External Survey URL** field.
4. Type an email subject in the **Email Subject** field.

5. Type the email body text in the **Email Body** field. Or, click **Select HTML Template** to use an out-of-box template.

   Note: HTML templates are only available if this option is selected in the global survey settings.

6. To preview the email, type a value in the **Test Record** field, and then click **Preview**.

Note: You can reference parameter names in the **External Survey URL**, **Email Subject**, and **Email Body** fields. For example, you can type "Survey for record {interactionId}" as the subject, where "{interactionId}" is a parameter for the interaction ID that triggered the survey request.

Create a localized email

The Survey Integration email functionality in HP Service Manager Survey Integration enables you to create alternate language versions of the survey request email. Survey recipients receive a localized email if their default language matches the language of the localized email. Otherwise, the user receives the default language version of the email that is configured in the global survey settings, regardless of the user's default language.

To create a localized email, follow these steps:

1. Open a survey definition record by creating a new survey or by searching for an existing survey.
2. Scroll down to the **Email Settings** section.
3. Configure the default language survey request email, and then click **Save**.
4. In the **Translations** sub-section, click **Add Translation** to display the Survey Email Localization form. The **ID**, **Last updated by**, and **Last update time** fields are populated automatically.
5. Select a language from the **Language** drop-down list.

   Note:

   - The default language that is configured in the global survey settings does not appear in this list.

- System administrators can configure which languages appear in the list by using the Languages table. To include a language, select that language in the Languages table, and then select the **Active for Survey Management** option.

6. Type a subject in the **Email Subject** field.
7. Type the email body text in the **Email Body** field.
8. Click **Save**, and then click **Cancel** to return to the survey definition record.

Configure the survey parameters

The **Parameters** section of the survey definition record in HP Service Manager Survey Integration enables you to configure the survey parameters that are not inherited from the connector. Parameters are defined in the survey connector, and are based on the specific Service Manager module to which the survey applies.

To configure the survey parameters, follow these steps:

1. Open a survey definition record by creating a new survey or by searching for an existing survey.
2. Scroll down to the **Parameters** section.
3. Mandatory parameters are predefined by the connector. To create additional parameters, click **Optional**.
4. Type a name in the **Parameter Name** field, select a field from the **Field Name** drop-down list, type a description of the parameter in the **Description** field, and then click **Save**.

View the survey workflow

HP Service Manager Survey Integration incorporates Process Designer technology. To view the Survey Integration workflow, click **System Administration** > **Ongoing Maintenance** > **Survey** > **Survey Workflows**, and then double-click the survey workflow. The survey workflow is also displayed in the **Workflow** section of the survey definition record.

To view specific information about a transition or phase in the survey workflow, click the transition or phase.

Out-of-box Survey Integration workflows comprise the following three phases.

Phase	Description
Planning	The survey manager configures survey settings such as data filters, recipients, and parameters. Survey invitations are not sent during this phase.
Scheduled	The survey runs for the configured period. The majority of settings are no longer editable during this phase.
Retired	The survey is no longer active.

Note: When the date that is configured in the **Active To** field of the survey settings passes, the survey automatically transitions from the Scheduled phase to the Retired phase.

View the survey history

The **History** section of the survey definition record in HP Service Manager Survey Integration displays basic information about the life of a survey. The fields in this section cannot be edited.

To view the survey history, follow these steps:

1. Open a survey definition record by creating a new survey or by searching for an existing survey.
2. Scroll down to and expand the **History** section to display the following information:
   - Who created the survey
   - When the survey was created
   - Who last updated the survey
   - When the survey was last updated
   - Who retired the survey
   - When the survey was retired
3. Click the **Show Send History** button to display the following information:
   - When the survey was sent
   - The status of the uploaded and sent data
   - Detailed information about the uploaded and sent data

4. Click the **Show Send Log** button to display the following information:
   - When the survey was sent
   - The recipient of the survey request email
   - The record that triggered the survey

Survey Integration reference material

This section introduces the Survey reference material.

Survey connectors

The survey connector is the integration method that SM Survey and Survey Integration use to send survey data to survey recipients. The survey connector defines some elements of the survey, such as the survey parameters, survey recipients, and connection parameters.

Out-of-box deployments of Survey contain the following types of connector. For scheduled SM surveys, users can create surveys based on the out-of-box internal connector and there is no need to create any new connectors.

ID	Name	Description
001	API Connector - Market Tools	An API-based connector that uploads data directly to the Market Tools survey solution
002	URL Connector	An URL-based connector. When you use this connector to manage a survey, survey recipients are emailed a URL that points to the survey
003	API Connector - Medallia	An API-based connector that uploads data directly to the

ID	Name	Description
		Medallia survey solution
004	Internal Connector	The internal connector for scheduled SM survey using Internal URL

To view the available survey connectors, follow these steps:

1. In the system navigator, click **System Administration** > **Ongoing Maintenance** > **Survey** > **Survey Connectors** to display the Survey Connector form.

2. Enter search criteria into any of the fields, and then click **Search**.

Security areas

HP Service Manager Survey Integration includes two security areas that ensure correct security in the Time Period Management module.

The following table displays the mapping between the security areas and the security roles in Service Manager Survey.

Area	Applies to interactions in	Roles
Survey	Survey definitions	Survey Administrator
		Survey Analyst
		Survey Manager
Survey configuration	Survey connectors	Survey Administrator
Tailoring	Survey settings Survey workflow	Survey Administrator

Security roles

HP Service Manager Survey uses the following three security roles.

Role	Area	Rights

Survey Administrator	Survey	Full rights for area
	Survey configuration	Full rights for area
Survey Analyst	Survey	Partial rights for area (can only update assigned surveys and cannot un-retire surveys)
Survey Manager	Survey	Full rights for area (can always update all survey definition records)

The following rights can be configured for Survey Integration security roles.

Right	**Description**
View	Can view survey definition records
New	Can create new survey definition records
Update	Determines when a user can update a survey. This right has the following options: • Never • Always • When assigned • When assigned to workgroup
Delete / Close	Determines when a user can retire a survey. This right has the following options: • Never • Always • When assigned • When assigned to workgroup
Expert	No special functionality related
Admin	Has administrative rights (by default, full rights to the survey module)

Note: The **When assigned** and **When assigned to workgroup** values in the **Update** and **Delete/Close** fields are not supported in the Survey Configuration security area.

The following settings can be configured for Survey Integration security roles.

Setting	**Description**

Can copy record	Can copy survey definition records
Can create global inbox	Can create global time period inboxes
Initial Inbox	Initial inbox for time period module
Manage format	Sc manage format
Can create personal inbox	Can create personal inboxes for survey definition records
Un-retire	Can un-retire (reopen) survey definition records
New Thread List -> Edit	Determines whether a new thread is opened when a user moves from a List to an Edit screen
New Thread Search -> List	Determines whether a new thread is opened when a user moves from a Search screen to a List
New Thread View -> Edit	Determines whether a new thread is opened when a user moves from an Inbox to an Edit screen
New Thread View -> Search	Determines whether a new thread is opened when a user moves from an inbox to a Search screen

Parameter mapping

The following mapping types are available when you create a new parameter in HP Service Manager Survey Integration framework.

Predefined mapping type	Description	Example syntax
Value	A constant value	• John.doe@hp.com (email) • jdoe (operator name) • DOE, JOHN (contact name)
Variable	Any variable that is available when the survey runs	$G.serviceDesk
Field	A valid field name in the selected Service manager module	Incident.id
RAD expression	Any valid RAD expression that returns the required value	jscall(<lib.function>, contact.name in $L.file)
Predefined	The following predefined options are	

	available: • Recipient Email • Recipient Name • Language • Web URL • ESS URL • External URL	

Recipient mapping

The following mapping types are available when you create a new recipient in HP Service Manager Survey framework.

Predefined mapping type	Description	Example Syntax
Value	A constant value. This value must be a valid email address, contact name, or operator name. Multiple values can be entered and must be separated by a semi-colon (;).	• John.doe@hp.com (email) • jdoe (operator name) • DOE, JOHN (contact name)
Variable	Any variable that is available when the survey runs. If the recipient type is set to **Person**, this value must be a valid email address, contact name, or operator name. If the recipient type is set to **Group**, this variable must contain a valid group name.	• $G.serviceDesk (person) • $lo.pm.assignment (group)
Field	A valid field name in the selected Service manager module. If the recipient type is set to **Person**, this value must be a valid email address, contact name, or operator name. If the recipient type is set to **Group**, this variable must contain a valid group name.	• contact.name (person) • assignment (group)
RAD expression	Any valid RAD expression that returns an email address, a contact name, an operator name, or an array of values. Multiple values can be entered and must be separated by a semi-colon (;).	jscall(<lib.function>, contact.name in $L.file)

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