

# Survey Definition Table and Field

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Once the questions table has been defined and some questions created, you are ready to combine them into question sets, which will be based on a Survey Definition field.

Typically it will make sense to store the question set definitions in another table called Survey Types or Question Sets or whatever makes sense for your usage. This table will include a record for each Survey Definition or Question Set that defines how the questions behave for that set.

The table should generally include one or more fields that can be matched against one or more fields in the table where you want the questions to appear, to auto-display the correct question set.

For instance, suppose you have named this table Question Sets and you want to ask a different set of questions in a support table depending on which product a user selects. You would have a field in the Question Sets table linked to your products. It may support one or more values, so a particular question set could be linked to multiple products. When a user creates a support case, they will select a product, and the Survey Presentation field in the support case table will be defined to match the product they select to this multivalued linked product field in the Question Set table to pull in the right survey definition value and therefore the correct question set record.

Or suppose you are using this to present a variety of surveys to customers. You would create a Survey Type table with a record for each survey/set of questions. You might have a choice field for survey type in this table as well.

To present a customer with a particular survey, you could simply give them a hyperlink – in an email or online – to click that sets the Survey type field to the desired value, thus pulling in the matching set of questions.

# Setup of Survey Definitions Field

First create the table that will hold the survey definition records. Then create any fields you want to use to identify the survey or question set in another table and that can be used to pull in the right set of questions.

Then create a new field using the Survey Definition data type. On the General tab of the field wizard, choose the table where the Question Description field can be found and the specific Question Description field that the questions will be drawn from. The only options presented will be fields of the Question Description type. The other tabs have the standard field options.

**General** Options Permissions Display

Next Finish Cancel

This label is associated with the field and is seen by most users. **\*Field label**  
Survey Definition  
Use HTML editor

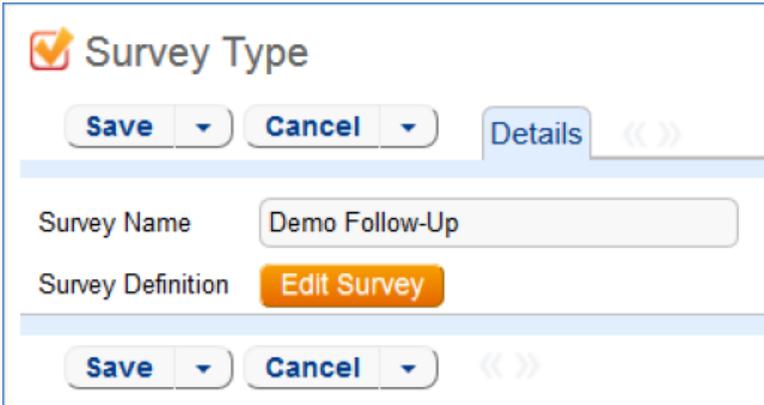
This is the actual name of the field in the database. It may not contain spaces or non-alphanumeric characters. Users generally do not see this name. **\*Field name**  
survey\_definition

By default, the field name is constructed by replacing spaces in the field label with "\_" characters.

**\*Questions source**  
Survey Question : Question ▾

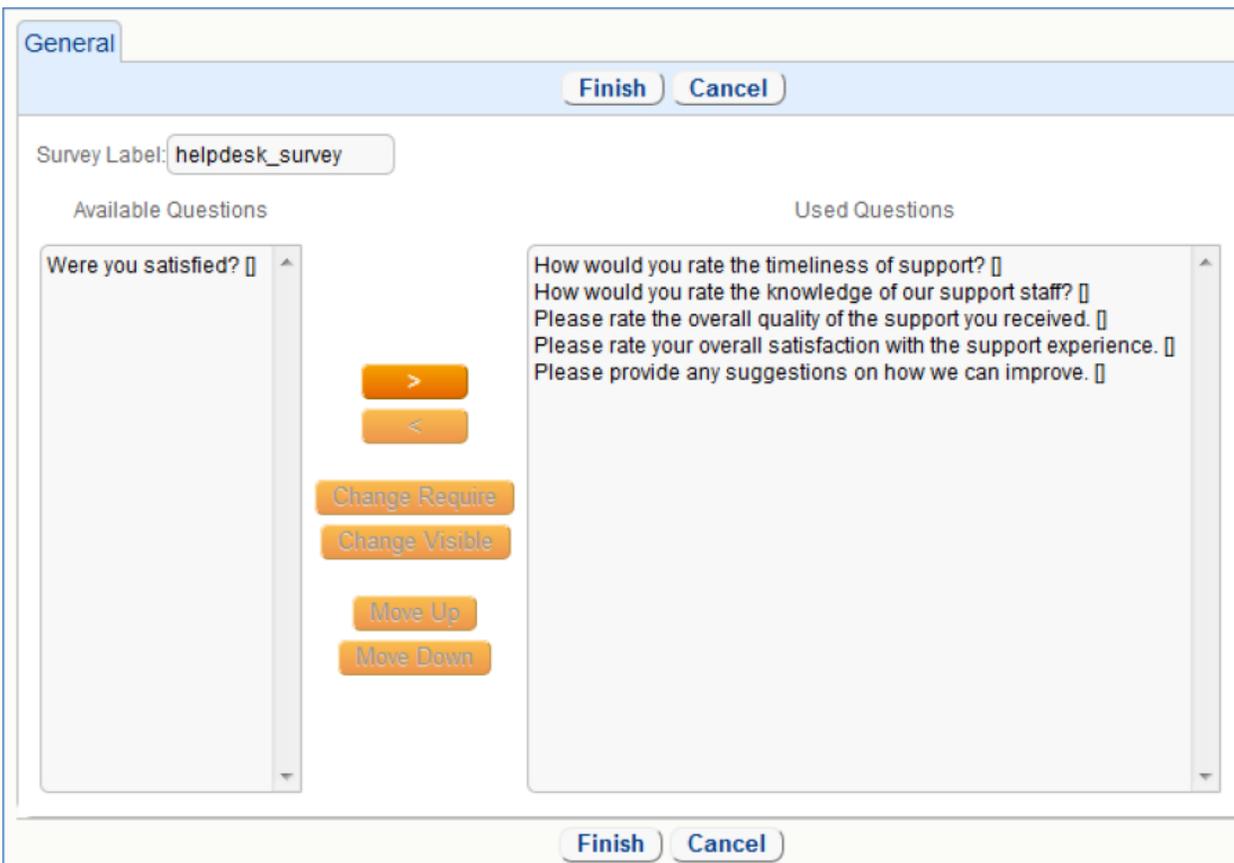
# Creating a Survey Definition Record

When creating a record in a table with this data type, the user sees a button 'Edit Survey' where this field is placed.



The screenshot shows a form titled "Survey Type" with a checkmark icon. It features a top navigation bar with "Save", "Cancel", and "Details" buttons. Below this, the "Survey Name" field contains "Demo Follow-Up". The "Survey Definition" field contains an orange "Edit Survey" button. At the bottom, there are "Save" and "Cancel" buttons and navigation arrows.

Clicking the button brings up the survey wizard. There is only one tab; it resembles the Available Actions / Selected Actions in rules and workflow. All questions defined by the table and field selected in the field wizard will be listed under Available Questions.



The screenshot shows the "General" tab of a survey wizard. It has "Finish" and "Cancel" buttons at the top. The "Survey Label" field contains "helpdesk\_survey". There are two main sections: "Available Questions" on the left and "Used Questions" on the right. The "Available Questions" section contains the question "Were you satisfied? []". The "Used Questions" section contains five questions: "How would you rate the timeliness of support? []", "How would you rate the knowledge of our support staff? []", "Please rate the overall quality of the support you received. []", "Please rate your overall satisfaction with the support experience. []", and "Please provide any suggestions on how we can improve. []". Between the sections are several orange buttons: ">", "<", "Change Require", "Change Visible", "Move Up", and "Move Down". At the bottom, there are "Finish" and "Cancel" buttons.

The options for Change Require and Change Visible between the sections. This is where requirement and conditional visibility are defined for any of the questions in the Used Question section.

Only show this question if answer to the question

How would you rate the knowledge of our support staff? ▾

contains one of these values: :

- Poor
- Fair
- Good
- Very Good
- Excellent

**Finish** **Cancel**

Make the question required:

Yes

No

Conditionally, when the

Please rate your overall satisfaction with the support experience. ▾

contains one of these values: :

- Very Dissatisfied
- Somewhat Dissatisfied
- Neutral
- Somewhat Satisfied
- Very Satisfied

**Finish** **Cancel**

Note that Conditional Requirements or Visibility can only be based on other used questions with a type of Choice or Multi-choice.

Once you have defined your question sets, you can see the questions listed above the Edit Survey button:

Survey Name	<input type="text" value="Helpdesk Case"/>
Survey Definition	helpdesk_survey: How would you rate the timeliness of support? How would you rate the knowledge of our support staff? Please rate the overall quality of the support you received. Please rate your overall satisfaction with the support experience. Please provide any suggestions on how we can improve.
	<input type="button" value="Edit Survey"/>

When the survey questions are presented to a user, the questions will be displayed in a single column from top to bottom in the order shown here. It is not possible to arrange the questions in multiple columns on the layout. However, it is possible to use two question sets and put each one in a separate column to give a two column display. Here is the result of the setup shown above:

Survey

**Questions** Related Records History <>

ID 32 Survey Type

Submitter Name  Submitter Company

Survey Questions

How would you rate the timeliness of support?  Excellent  Very Good  Good  Fair  Poor

How would you rate the knowledge of our support staff?  Excellent  Very Good  Good  Fair  Poor

Please rate the overall quality of the support you received.  Excellent  Very Good  Good  Fair  Poor

Please rate your overall satisfaction with the support experience.  Very Satisfied  Somewhat Satisfied  Neutral  Somewhat Dissatisfied  Very Dissatisfied

Please provide any suggestions on how we can improve.

<>