Survey Definition Table and Field

Once the Question Table and Description Field has been defined and some questions have been created, you are ready to combine them into question sets. These are typically stored in a Survey Types or Question Sets table, where each record holds a set of questions and defines how that set of questions behaves. This table includes fields that can be matched against the table where you want the questions to appear, to automatically display the right question set.

For instance, suppose you want to ask a different set of questions in a Question Sets table depending on which product a user selects. You would have a field in the Question Sets table linked to your products. It might support one or more values, so a particular question set could be linked to multiple products. When a user creates a support case, they select a product, and the Survey Presentation field in the service request automatically pulls in the question set for that product. Behind the scenes, the system matches the selected product to the multi-value linked product field in the Question Sets table to pull in the right Survey Definition value and therefore the correct question set record.

For another example, 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 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 that sets the Survey type field to the desired value, thus pulling in the matching set of questions.

Creating the Survey Definitions Field

First, create the Survey Types or Question Sets table you want to use to store the sets.

1. Click the Setup gear in the top-right corner, click Tables, select the Table Tree, and click New to create a table. For more information about creating tables, see Table Wizard.
2. Create any fields you want to use to identify the set when you refer to it from another table.
3. Then, create a new Survey Definition field.
4. On the General tab, name the field and select the table and field pair you want to pull the questions from. For example, if your questions are stored in a Question table in the Survey Questions table, you would select Survey Question : Question from the drop-down. The list only shows compatible fields.
5. Complete the Options, Permissions, and Display tabs as you would for any other field.

Creating a Survey Definition Record

Define each set in a separate record.

1. Next to the Survey Definition field, click Edit Survey to open the Survey wizard.

2. Enter a Survey Label.
3. In the list on the left, select the first question you want to include in the set.
4. Click the right arrow to add it to the survey.
5. Continue building the survey list this way until all the questions have been added. If you add one by mistake, select it in the list on the right and click the left arrow to remove it.
6. When all the questions have been added, use Move Up and Move Down to put them in the desired order.
7. Identify the selected questions that need to be marked required. For each one:
   a. Select it in the list on the right and click Change Required.
   b. In the window that opens, select Yes or Conditionally.
   c. If you selected Conditionally, set the conditions that make the question required. Only Choice or Multi-choice questions can be used as conditions.
8. Identify the selected questions that need to be hidden under certain conditions. For each one:
   a. Select it in the list on the right and click Change Visible.
   b. In the window that opens, select the "Only show this question if answer to the question..." checkbox.
   c. Set the conditions that make the question visible. Only Choice or Multi-choice questions can be used as conditions.
9. Click Finish to save the question set. The selected questions now appear above the Edit Survey button.
10. Complete any additional fields configured in the record form as needed.