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Experts in Microsoft Dynamics

Site Assessment Survey

Prepared by
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1 Technical Survey Tool Overview

1.1 Introduction

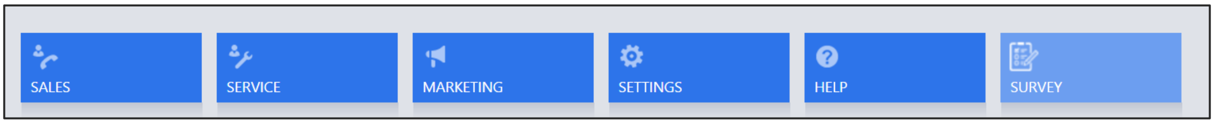
eBECS Site Assessment is an app for Dynamics 365 that provides the user with the ability to administer internal surveys that can be used in a multitude of different ways. The aim of this guide is to demonstrate the following:

- The capabilities of the Survey Tool
- The new entities and fields that you need to be aware of
- How to create and use a Survey
- The different Question Types available, there functionality and how to configure them
- The different Action Types available, there functionality and how to configure them

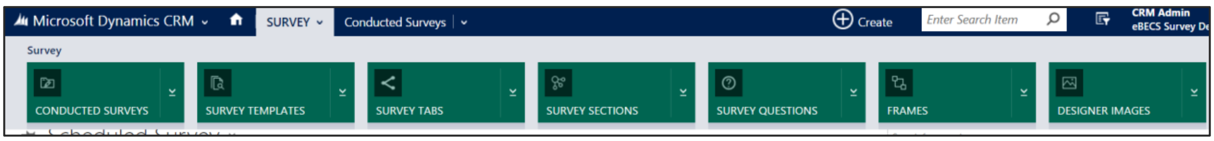
The Survey Tool brings a lot of new, powerful functionality to customers, allowing technicians or service workers for example, to report back directly into Dynamics 365 using tailored surveys that are relevant to the user. This allows customers to streamline their business as it shortens the amount of time taken for a technician to feed back into Dynamics 365 as well improving the accuracy of the data as there is less time for details to be forgotten. In this example, it is often the case that a technician may need to order a product for a customer, by using this Survey Tool they can directly feed back into Dynamics 365 and shorten the amount of time between being on site and the order and delivery of the product. These are just a few examples of how the survey tool can be used effectively to aid you in your day to day activities.

1.1.1 Configuration Walkthrough

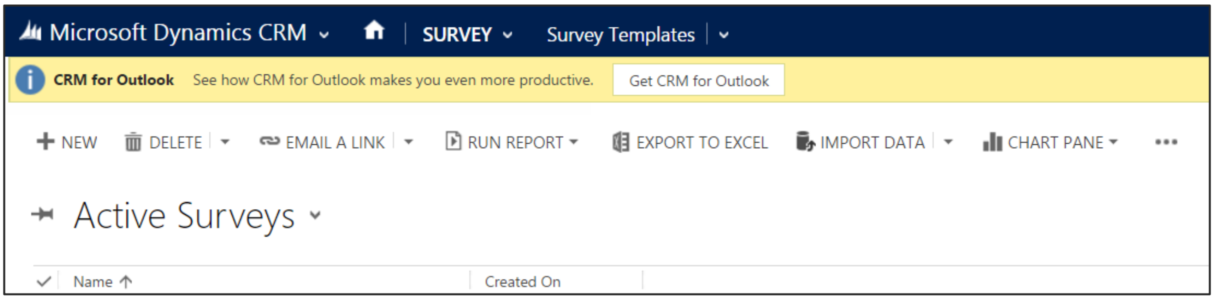
1. Firstly, navigate to the home page of Dynamics 365
2. Once you have dropped that down click on surveys on the far-right hand side:



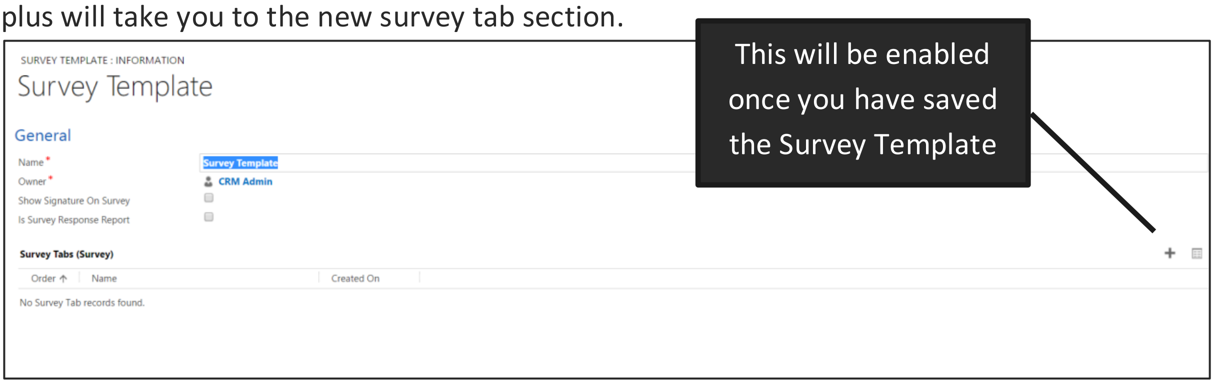
3. Next click on the down error next to the word ‘Survey’ and then select the ‘Survey Template’ (a Survey Template is required in order to take and conduct a Survey):



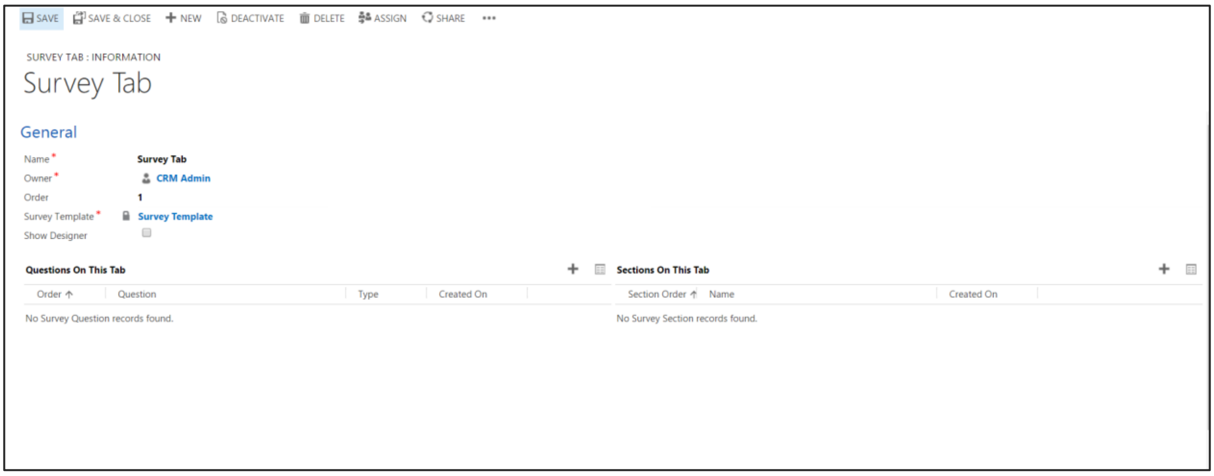
4. Now click on the ‘new’ button in the ribbon:



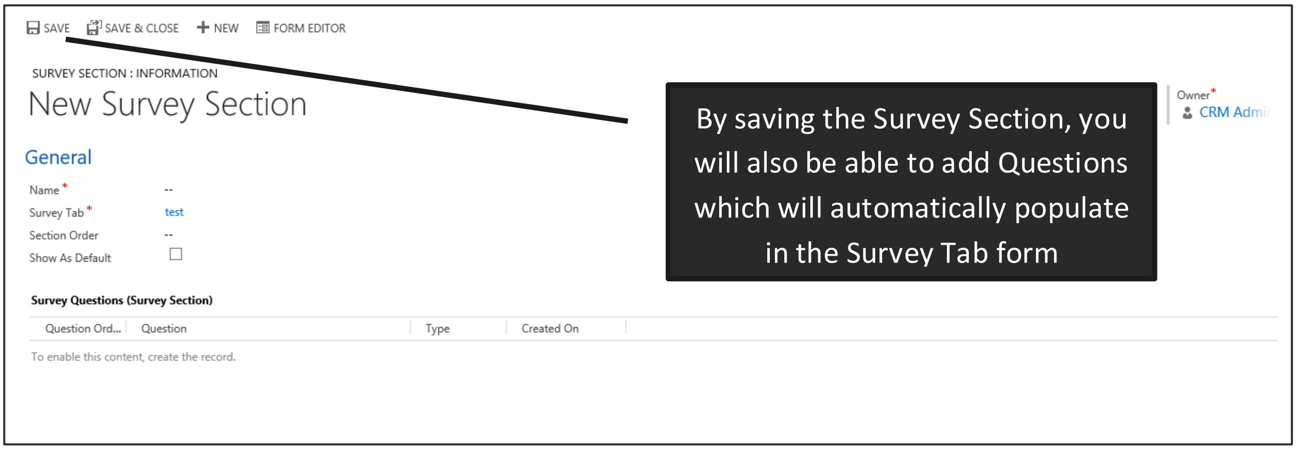
5. Give the Survey a name and then save it. Once you have saved, a plus will appear above the top right hand side of the 'Survey Tab' sub-grid. To create a Survey, you must first create a Survey Template, then create a Survey Tab and then create a survey question. This plus will take you to the new survey tab section.



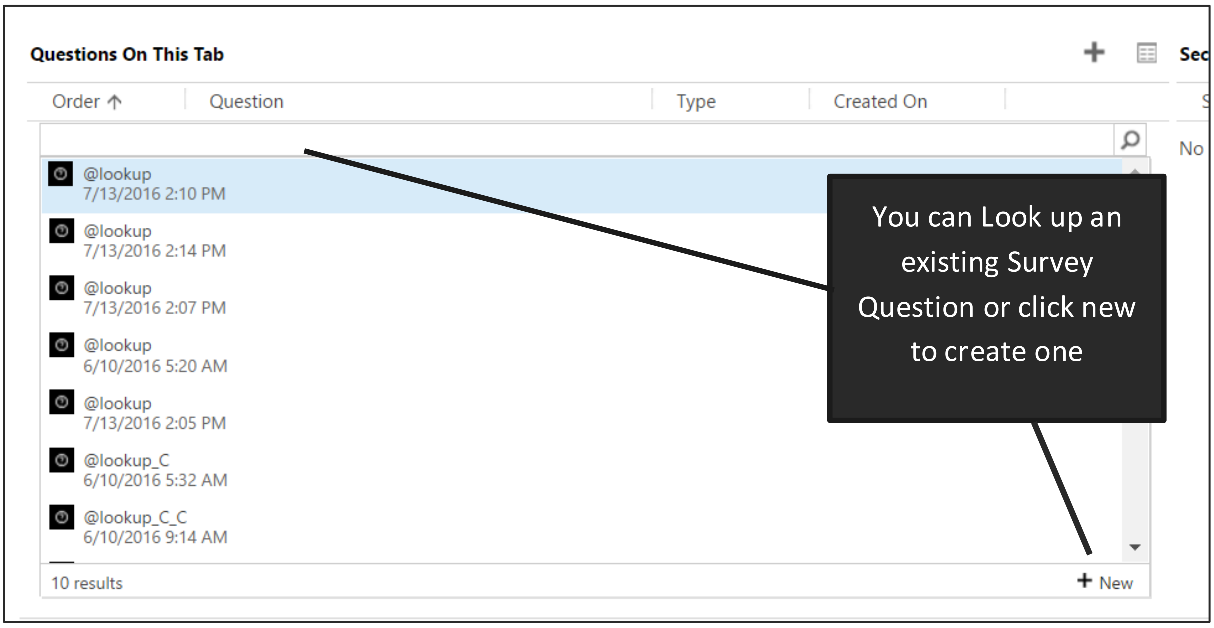
6. Once you have selected the plus the Survey Tab form will open, fill in the fields for the new Survey Tab and select Save. It is important but not mandatory to give the Survey Tab an order number as many Surveys will use multiple Tabs and you would use the Order field to breakdown the Survey into different Tabs in the order you wish.



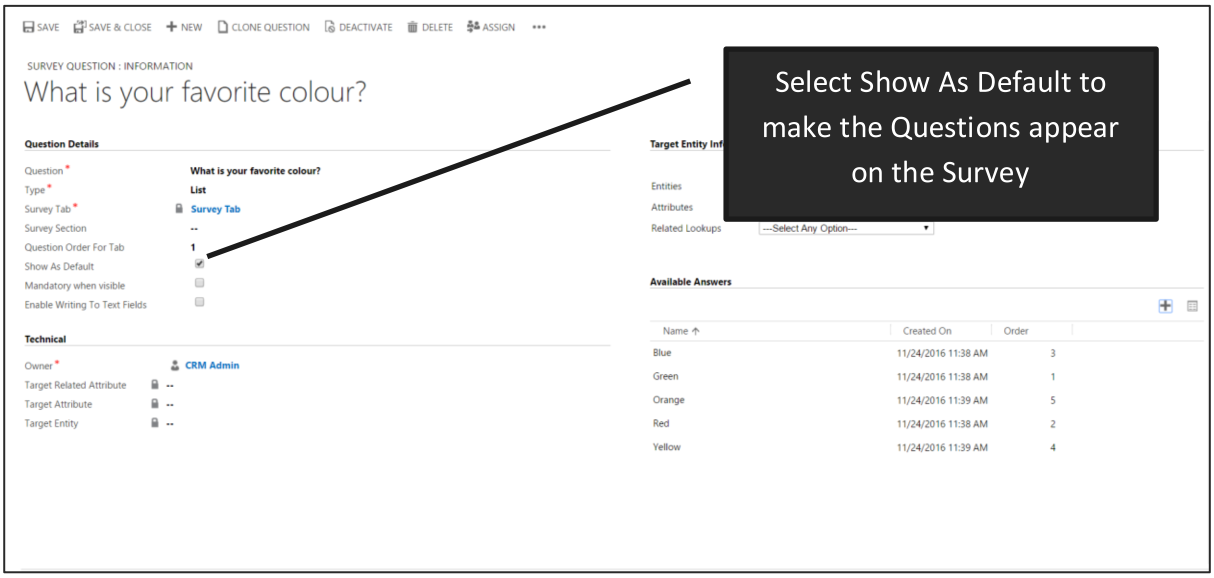
7. To break this down further, you can add a 'Survey Section' on the Tab. Again, the 'Order' field will arrange the order in which the Sections within those Tabs will appear.



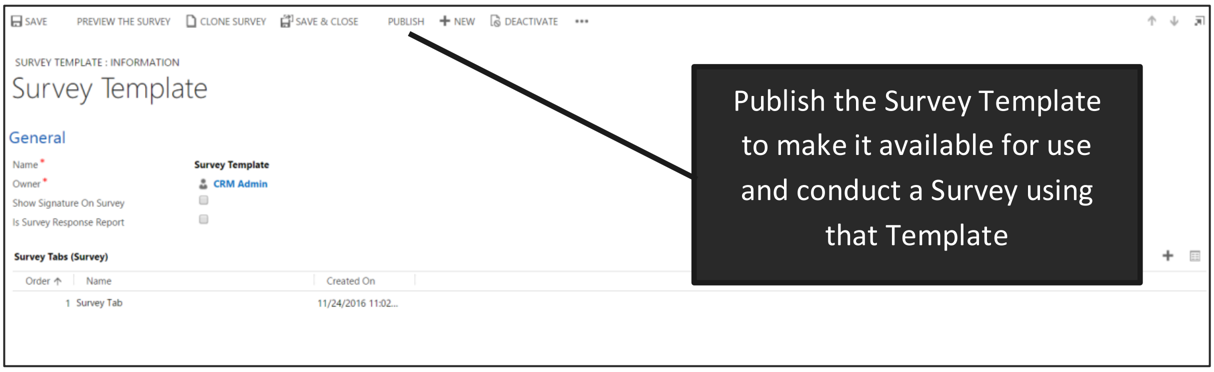
8. Once you have saved your new Survey Tab you will see a plus appear a top the 'Survey Questions' sub-grid. Click on this plus and it will take you to the new Survey Question form. When you press the plus a magnifying glass will appear, click the magnifying glass and then click new in the bottom right. Enter the details for the question that you want to put in your Survey. When you are creating a Survey Question, it is required that you choose the name and then choose the 'Question Type'. The different types of question and how they are used are in the below sections of this document. Again, it is important to select an Order for the Question which details what order the Survey Questions.



9. Once you have saved the Question, you can add available answers (only do this for question types that require it which is explained in the guide). There is a checkbox field called 'Show As Default' and it is important that this is ticked as this will allow the questions to be seen.

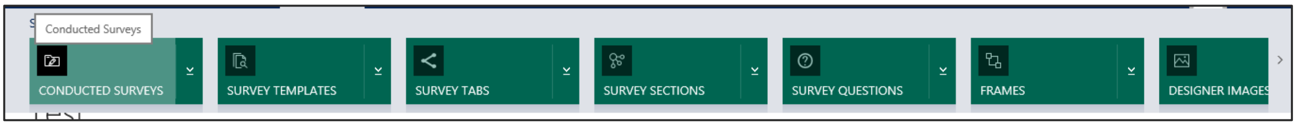


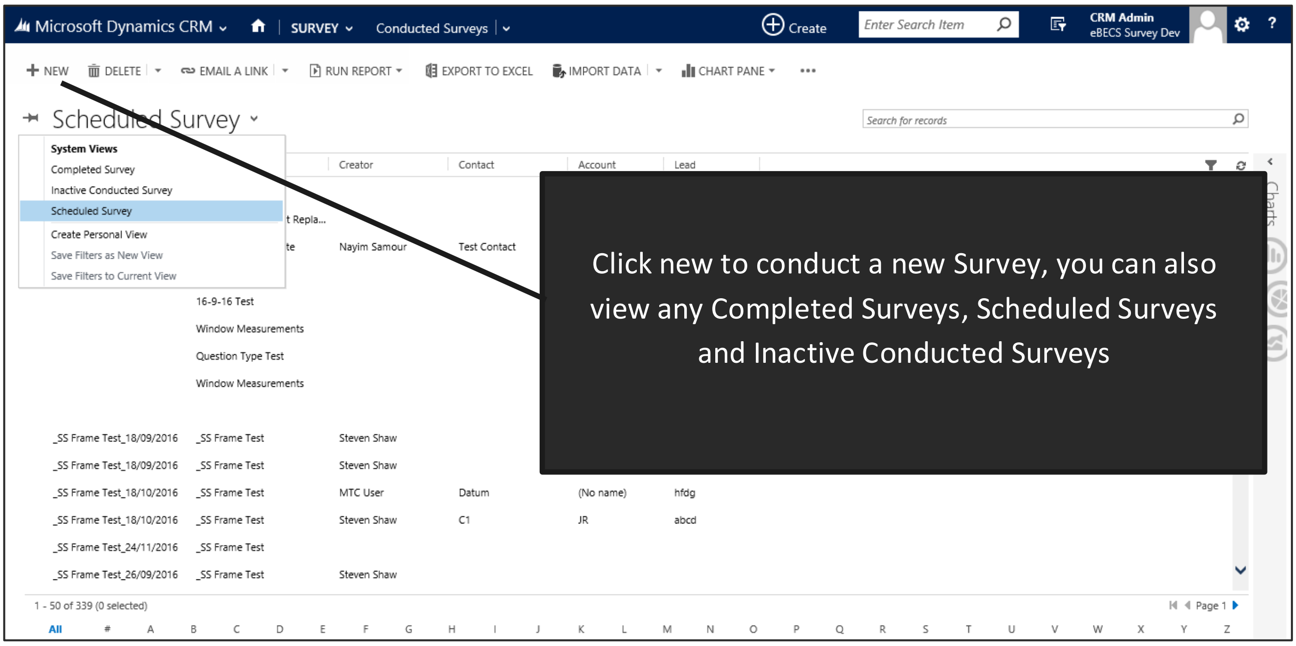
10. The final step in creating a Survey is to publish the Survey Template. If you navigate back to the 'Survey Template', either by 'Save and Closing' all your open forms or going straight to the 'Survey Template' entity, you will find the publish button in the ribbon. You will only be allowed to publish if all the tabs, questions and available answers have an order number.



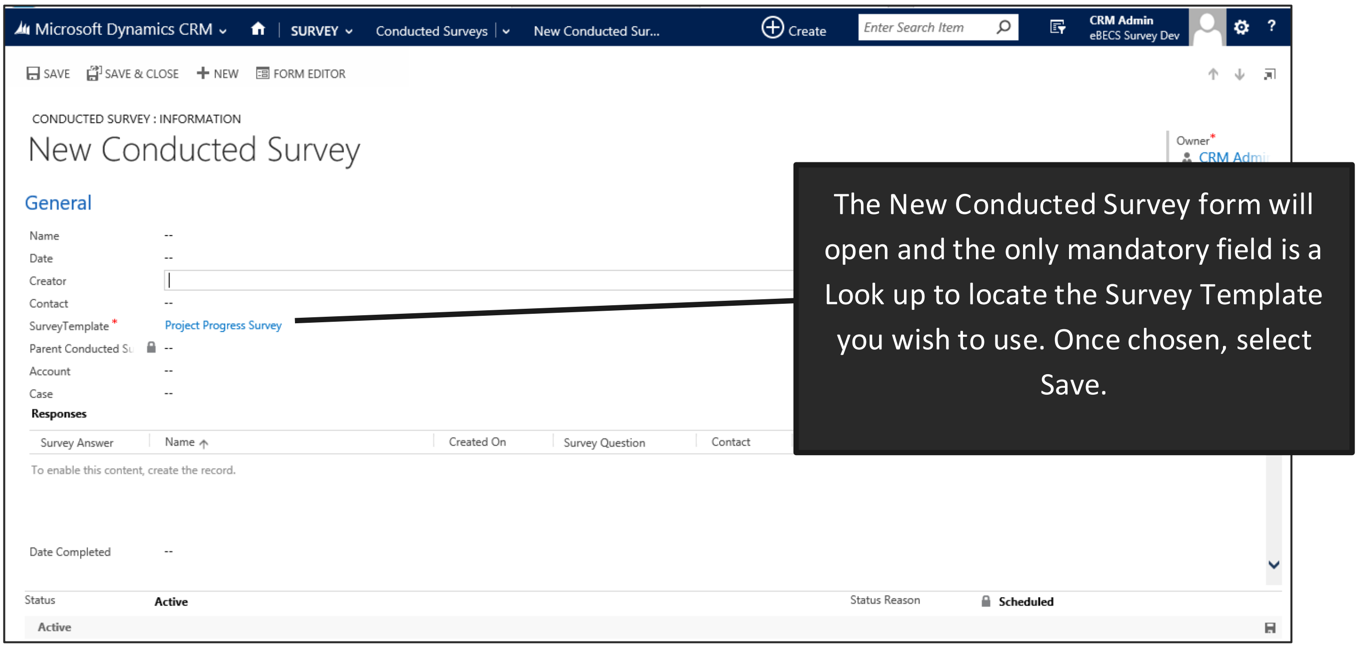
1.1.2 Conducting a Survey in Dynamics 365 and Resco

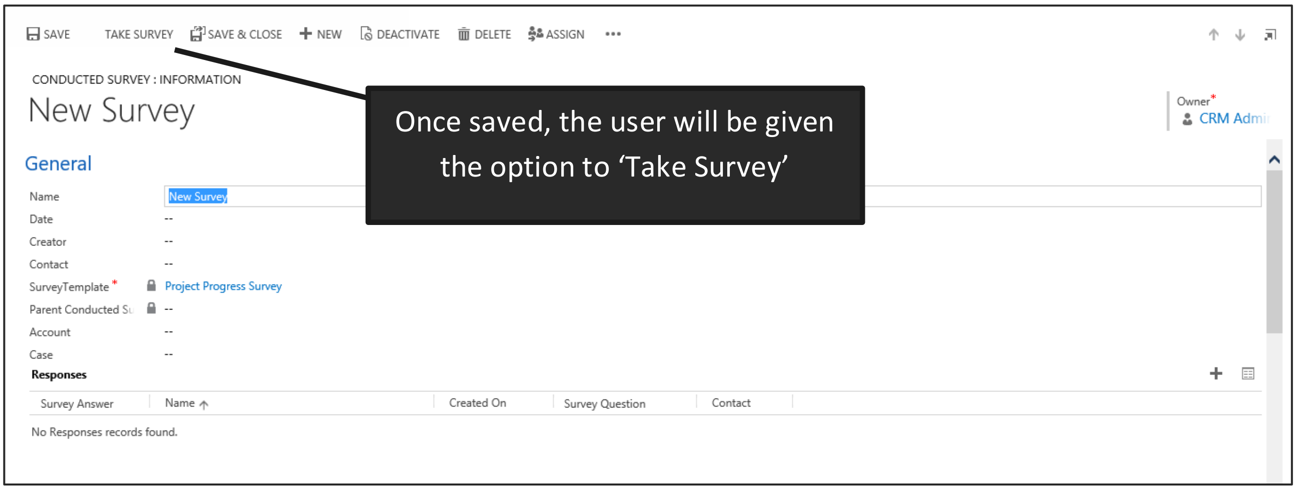
To then conduct the Survey you have created, follow the below screenshots. To take the Survey in Dynamics 365, navigate back to the main ribbon and click 'Conducted Surveys'.



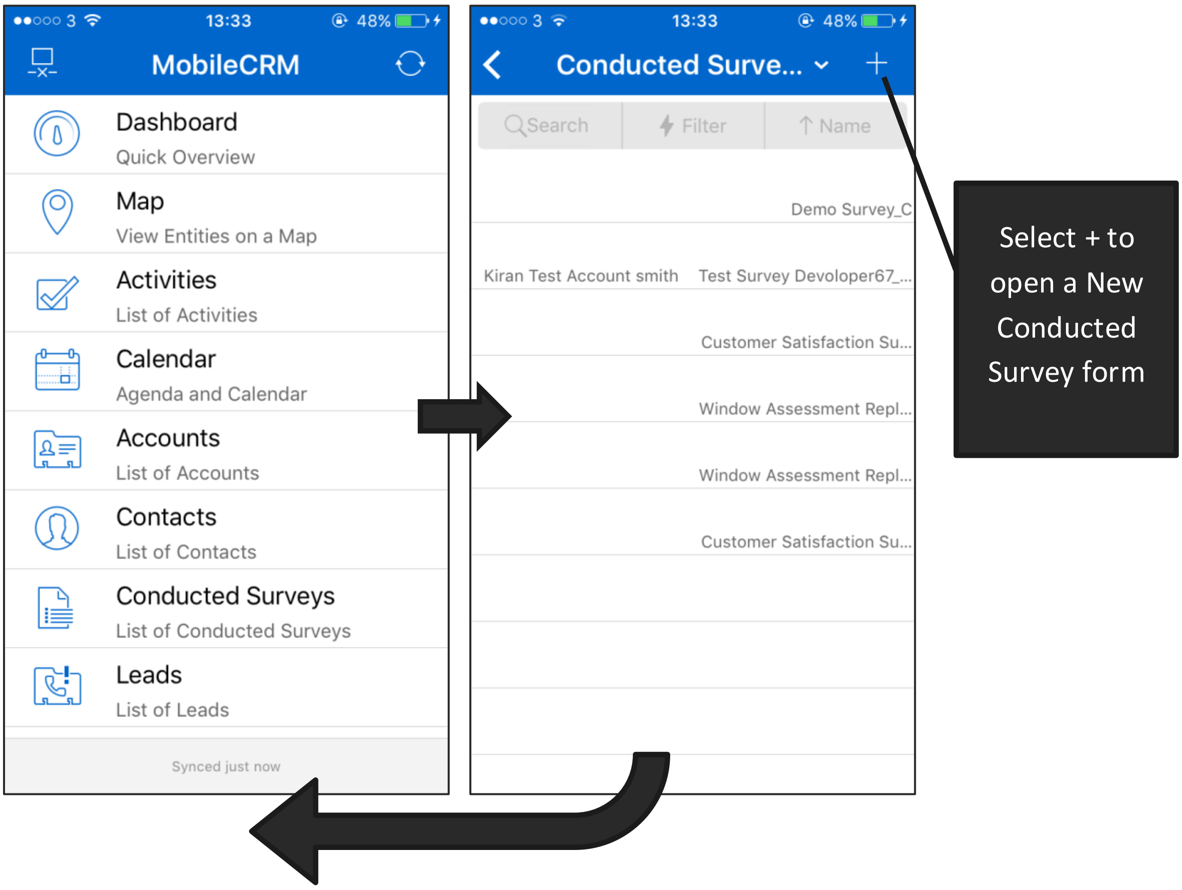


The New Conducted Survey form has different fields available but the only required one is the Survey Template field which is a Lookup to all published Survey Templates. It is recommended that you give the Survey a Name/Date/Account.

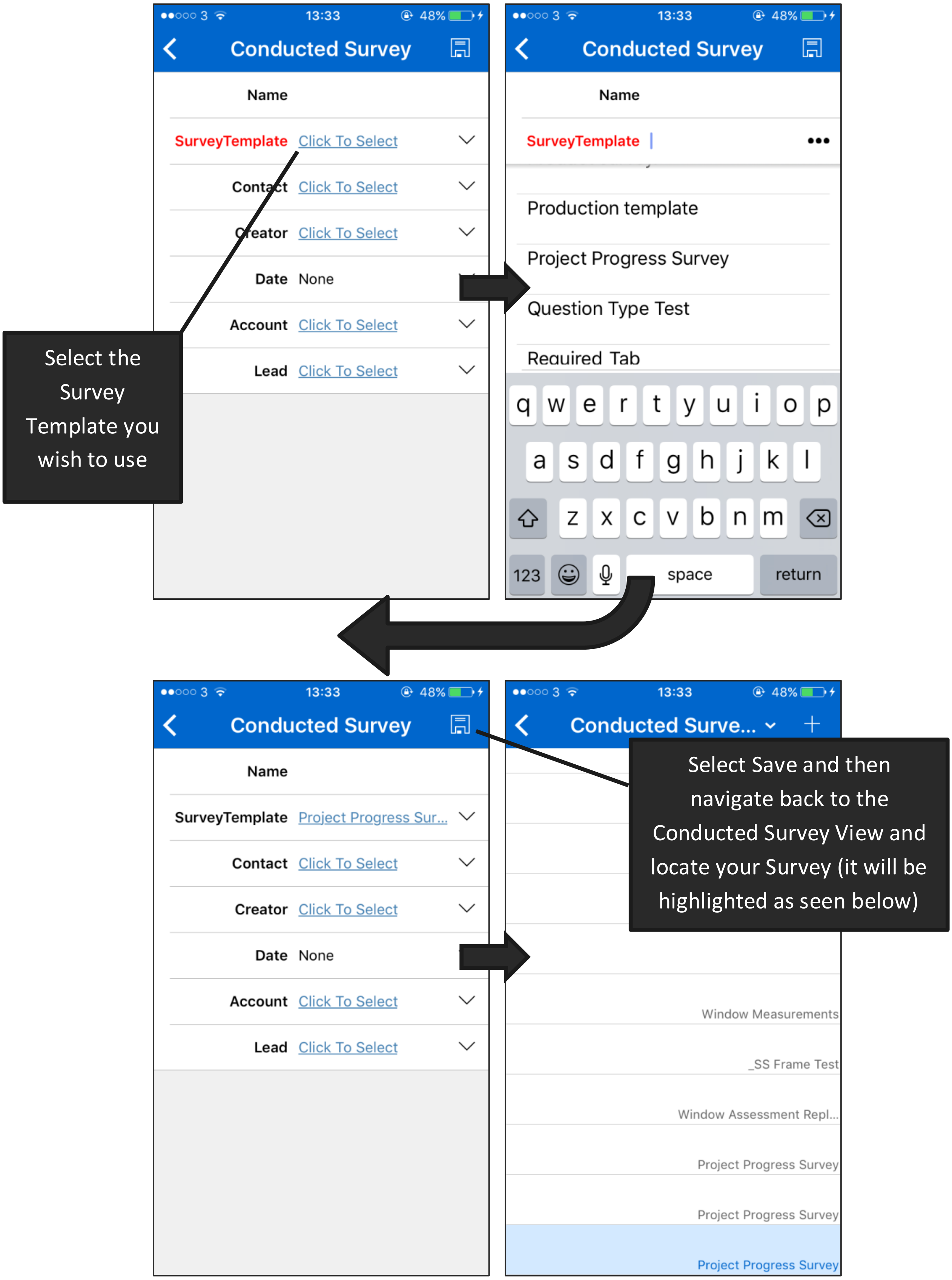




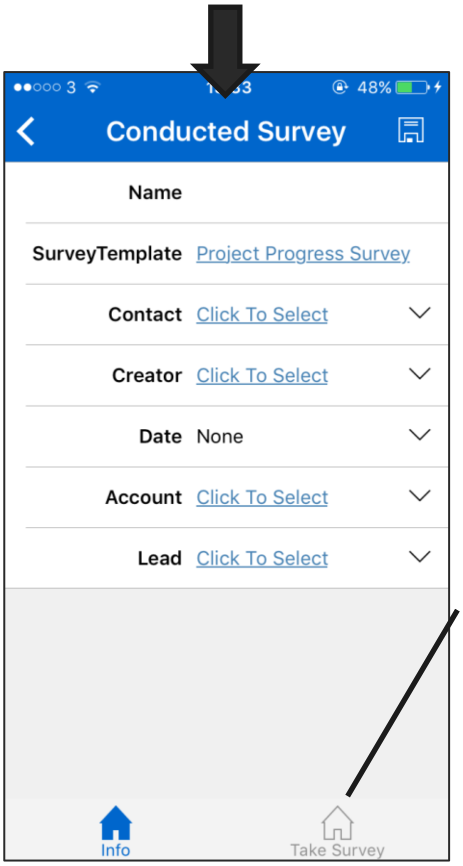
To conduct a Survey in the Resco Mobile Client, the process is similar and again shown below. First navigate to the Conducted Survey entity and select the + sign.



Again the Survey Template is a Lookup that will allow you to select a published Survey Template, as seen below.



You must save the Survey again in order to take it, in the Resco Mobile Client you will need to go back to the Conducted Survey view and find your Survey. *If you have just created it, it will be highlighted in the list.*



On reopening you will now be given the option to 'Take Survey'

1.1.3 Field Breakdown

This section is going to be a run through all the fields that have been put on each form and what functionality they drive (please note: the * means that this field is required on this form).

Conducted Survey

- Name: Name of the survey (Text)
- Date: Date of survey completion (date)
- Creator: Who is creating the conducted survey record (Lookup)
- Contact: What contact is the survey related too (Lookup)
- Survey Template*: Pick a survey template that you wish to use (Lookup)
- Parent Conducted Survey (locked field): This is a field that will be used if a child survey is created. It will be automatically populated with the parent survey (locked, will be automatically populated)
- Account: What account is the survey related too (Lookup)
- Case: what case is the survey related too (Lookup)
- Responses (Sub-grid): A list of complete survey response records
- Date Completed: Date of completion of survey (date)

Survey Template

- Name*: Name of the survey template (Lookup)
- Owner*: Owner of the survey template Record (Lookup)
- Show Signature on Survey: A tick box that dictates whether the signature will be displayed on the survey (tick box)
- Is Survey Response a Report: A tick box that decides whether the response of the surveys with this survey template will be a report in CRM (tick box).
- Survey Tabs (Sub-grid): A list of all survey tabs listed for this survey template

Survey Tab

- Name*: Name of the survey tab (Text)
- Owner*: Owner of the survey tab record (Lookup)
- Order: The order number that the survey tab will be displayed in, in the list of survey tabs on the survey template record (Text, must be a number)
- Survey Template*: The survey template that the survey tab will appear on (Lookup)
- Show Designer: Tick box that will show the designer (tick box)
- Questions on this tab (Sub-Grid): A list of all questions that are in this survey tab
- Sections on this tab (Sub-Grid): A list of all sections on this survey tab

Survey Section

- Name*: Name of the survey section (Text)
- Survey Tab*: The survey tab that this survey section belongs too (Lookup).
- Section Order: The order in which this section will appear on the survey tab sub-grid (Text, must be a number).
- Show as default: A tick box that dictates whether the survey section will be visible by default. If this is not ticked the section will not be visible by default (tick box)
- Survey Questions (sub-grid): The survey questions that will appear in this survey section.

Survey Question

- Question*: This field is where you input what the survey question is (Text).
- Type*: This is a dropdown list where you select what type of question it is going to be (list).
- Survey Tab*: What survey tab the question will appear on, once saved this will be locked and cannot be changed (Lookup)
- Survey Section: What survey section the question will appear on. Questions do not have to have a survey section but must have a survey tab (Lookup)
- Question Order for Tab: The order in which the questions will appear on the tab (Text, must be a number)
- Show as default: Dictates whether the question will be visible by default (tick box)
- Mandatory when visible: If this is ticked then the question will become mandatory whenever it is visible (tick box)
- Enable writing to text fields: Tick box then enables/disables writing to text fields (tick box)
- Owner*: The owner of the question record (Lookup)

- Target related attribute: A field that will be auto populated with a ‘related Lookup’ when selected in the ‘Target Entity Information’ section on the right-hand side of the form (locked Lookup field)
- Target Attribute: A field that will be auto populated with an ‘attribute’ when selected in the ‘Target Entity Information’ section on the right-hand side of the form (locked Lookup field)
- Target Entity: A field that will be auto populated with an ‘Entity’ when selected in the ‘Target Entity Information’ section on the right-hand side of the form (locked Lookup field)
- Entities: a drop down list that will allow the user to select an entity to relate the question too (drop down list)
- Attributes: a drop down list that will allow the user to select an attribute that will filter the contacts/accounts that are visible (drop down list)
- Related Lookups: a drop down list that will allow the user to select a related Lookup to filter further (drop down list)
- Available answers (sub-grid): This is where you will add the available answers to the Survey Question. This won’t be necessary for all Question Types. When the Survey Question record has been saved, there will be a plus above the top right of the sub-grid and this is where you can add new answers (sub-grid)

Survey Answer

- Answer*: The name of the answer you wish to set for the question (Text)
- Survey Question*: an auto populated field that will be populated with the question that you have created and set the answer for (locked lookup).
- Order*: The order you wish the answer to appear in (Text, must be a number)
- Min: this is where you can set a minimum value, pre-dominantly used for a number or currency based answer (number)
- Max: this is where you can set a maximum value, pre-dominantly used for a number or currency based answer (number)
- Actions if this answer is chosen (sub-grid): This is where you can set an action that you wish to be performed if the answer is chosen (sub-grid)

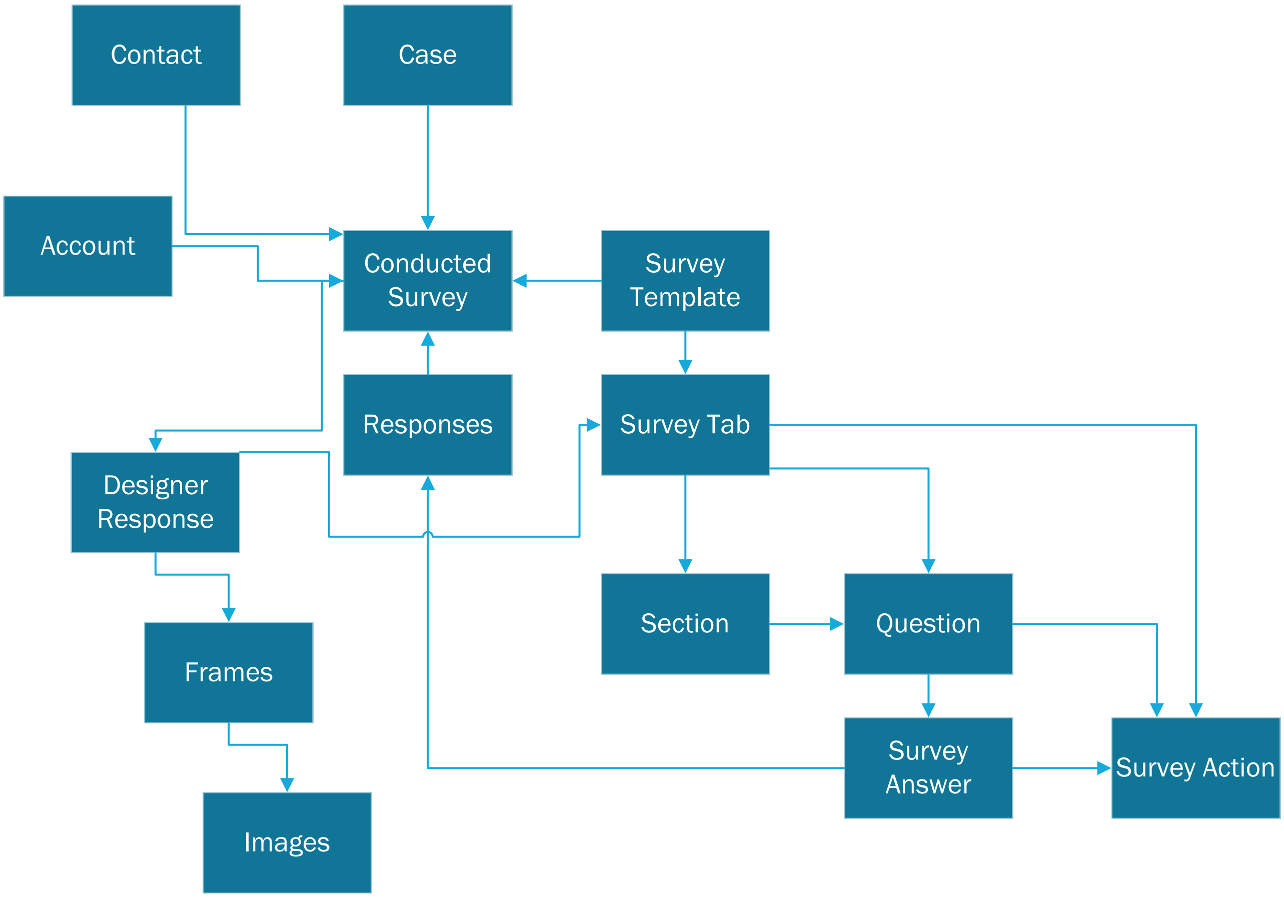
Survey Action

- Name*: Name of the action to be taken (Text)
- Actions: List of all different action types (List)
- Survey Answer*(locked): The answer this action will run on (locked Lookup)
- Tab for Action (locked): The tab the action will feature on. This will pull through automatically from the tab that is set on the question (locked Lookup)
- Question for Action (locked): This will stay locked unless a certain action type is selected. If the ‘apply custom filter’ action is selected, then this field will become mandatory and is a Lookup to available questions for the custom filter to operate on (Lookup)

Custom Filter Condition: If the “apply custom filter” action is selected then this filter will appear and become mandatory. In this field, you can enter the code that is downloaded from an advanced find fetch XML. Copy and paste the XML into the field and save and it should apply the advanced find custom filter (Text)

1.2 Entity Relationship Diagram

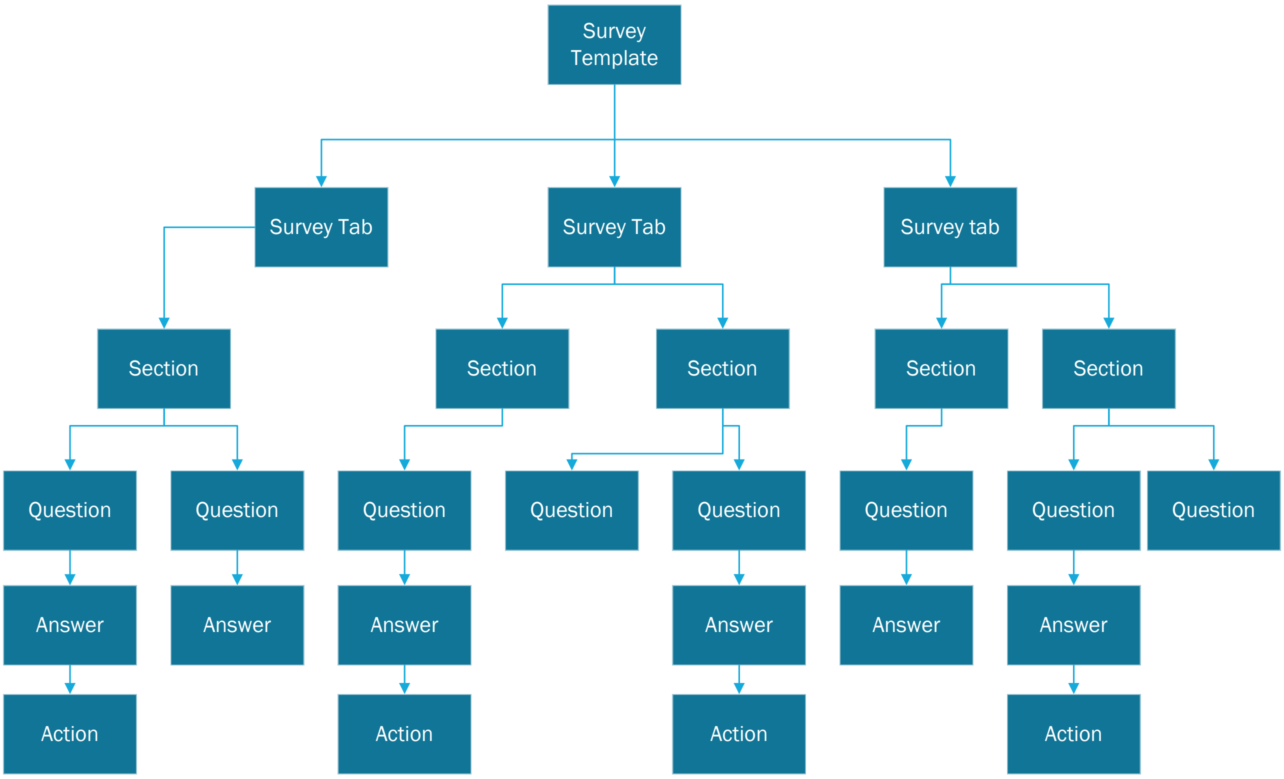
The below diagram displays the different Entities within the Technical Survey Tool and how they are related to each other.



1.3 Survey Template Structure

The Survey Template Structure is consistent throughout the Survey Tool. This structure is displayed in the diagram below, although the amounts can differ between templates. Each Survey Template must contain a minimum of one Survey Tab and Survey Section. The amounts of Questions, Answer and Actions differs due to the configuration of the Survey.

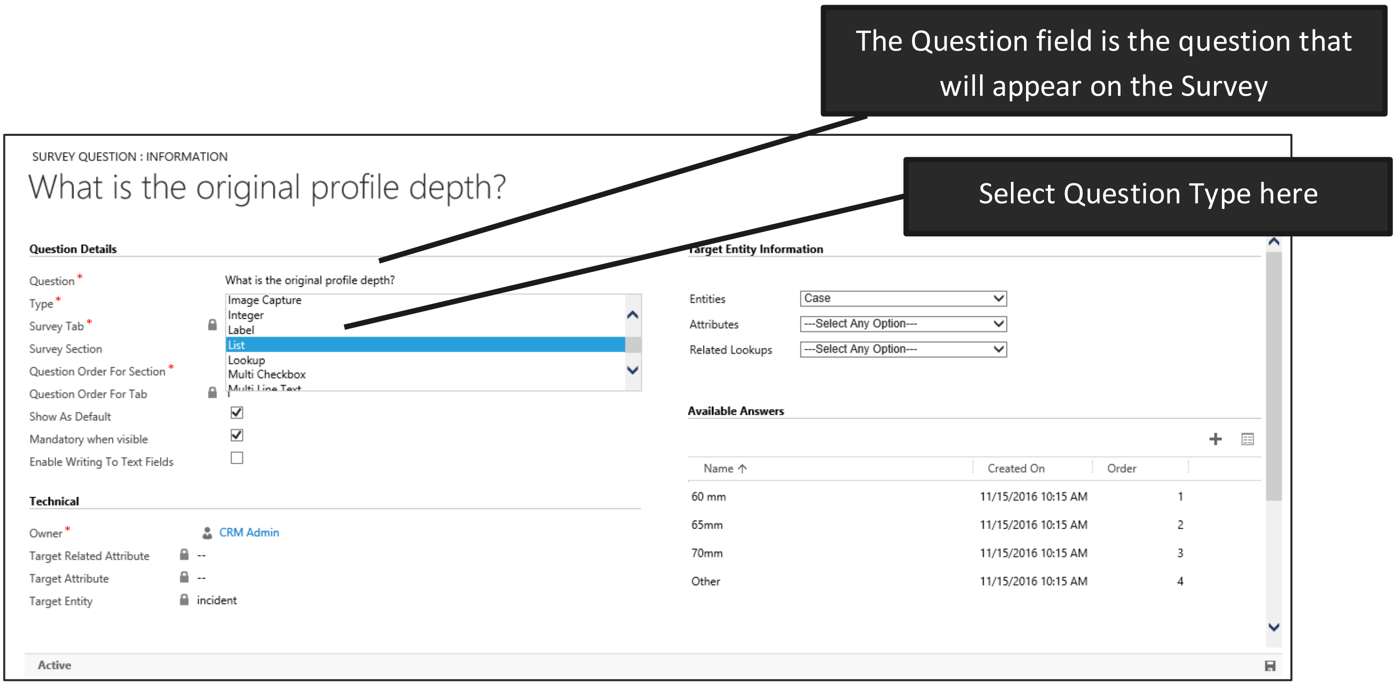
As you can see from the below diagram; a Survey Tab could contain just one Section, a Section could contain just one or multiple Questions and a Question may not have an Answer. For instance, the Label Question Type would not need an Answer (see 2.1.8) and you can have numerous Actions on an answer. For example, you could trigger an Answer to then Show a Section (see 3.1.16) and make that Section Required at the same time (see 3.1.12).



2 Question Entity

The Technical Survey Tool contains a question entity that allows the user to create their own questions and tailor them to meet their requirements. There are various Question Types that are available for the tool and these will be defined in further detail in the below sections.

Essentially, a Question Type allows the user to set the functionality behind the questions within the survey. It allows the user to choose the format in which the question can be answered, such as a list, two options or the ability to choose multiple answers to that specific question. The below screenshot depicts where these Question Types are chosen, and can be found in CRM by navigating to 'Survey' on the main ribbon, to 'Survey Questions' and creating a new Survey Question form or by clicking on an existing Survey Question.



Required Fields (*) to Create a Question:

- Question
- Type
- Survey Tab (automatically populated and locked)
- Question Order For Tab/Section
- Owner (automatically populated and locked)

2.1 Question Types

The below sections outline the different Question Types that are available within the Survey Tool and their functionality. The types available can range from the simple ability to add a short amount of text as an answer to picking an image from a drop-down list.

These sections will give a thorough guide on how to configure these Question Types and an example as to how they can be utilised. Also, depicted for each Question Type are screenshots of when that Question Type is executed in Dynamics 365 and the Resco Mobile Client, if that Question Type is available and functional for that client. Throughout these sections, this guide will consistently use the scenario of a field based Window and Door technician and the examples given will relate back to this.

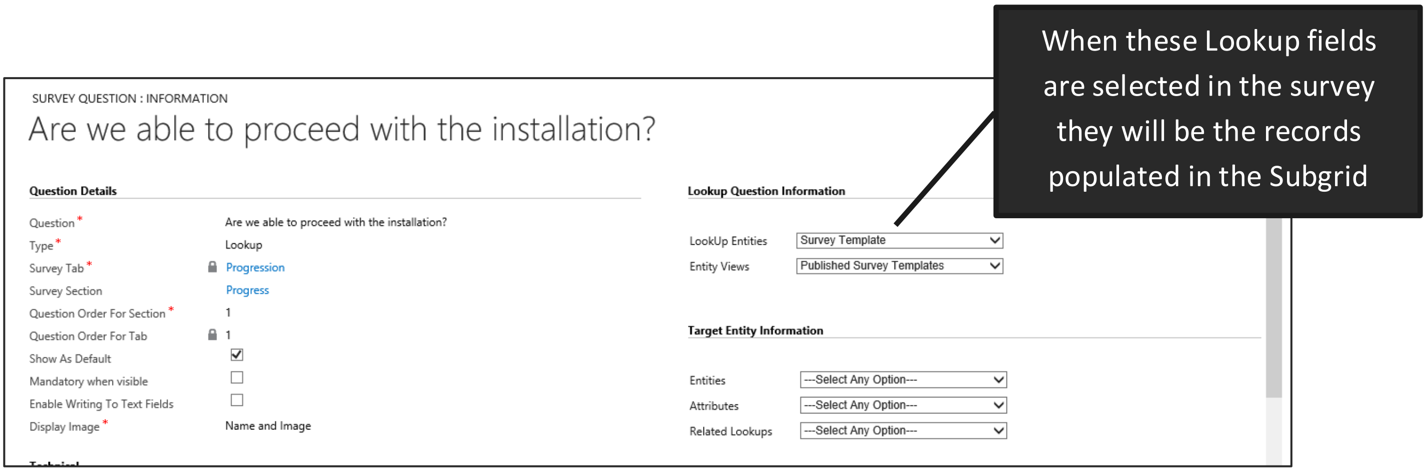
2.1.1 Show Subgrid

The 'Show Subgrid' Question Type allows the user to select and display child surveys. This is configured by adding a Lookup Question Type (**see section 1.1.10**) to the Survey Template and adding another Survey Question with the 'Show Subgrid' type below.

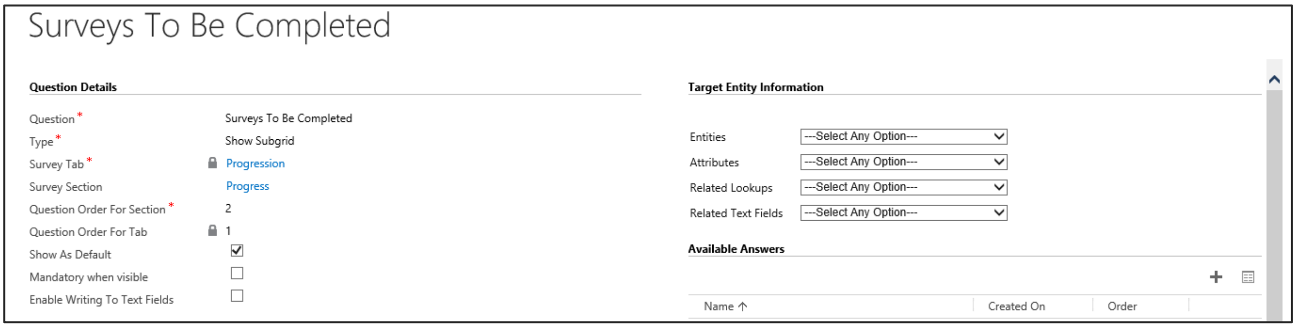

Survey Questions (Survey Section)

Question Ord...	Question	Type	Created On
1	Are we able to proceed with the installation?	Lookup	11/18/2016 11:22 AM
2	Surveys To Be Completed	Show Subgrid	11/18/2016 11:24 AM

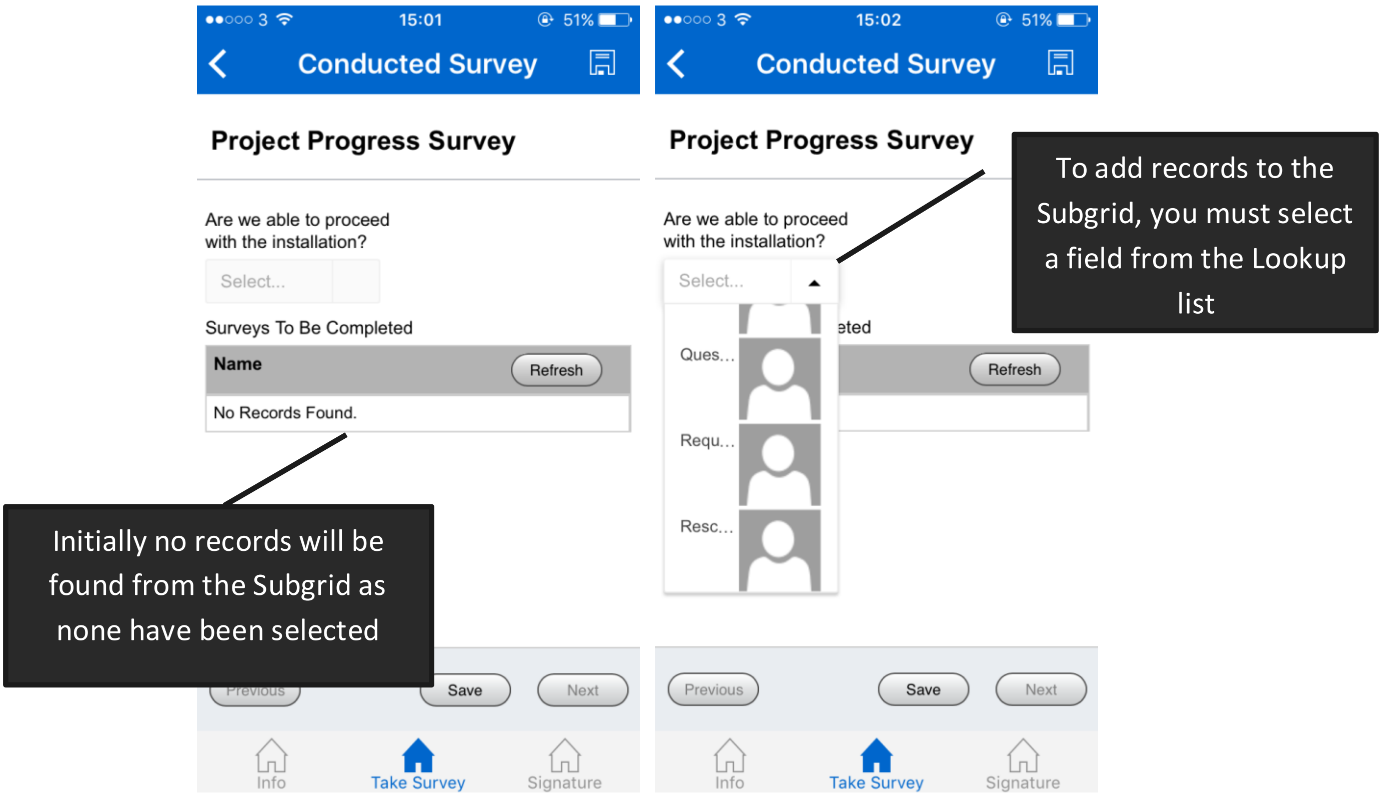
The Lookup entity and consequent entity view must be chosen for these records to be selected and populated in the Subgrid. To configure this Question Type, you must first create a Survey Question and select 'Lookup' on the required 'Type*' drop-down list field. The Survey Tab is a required field and the 'Question Order For Section' is also a required field.

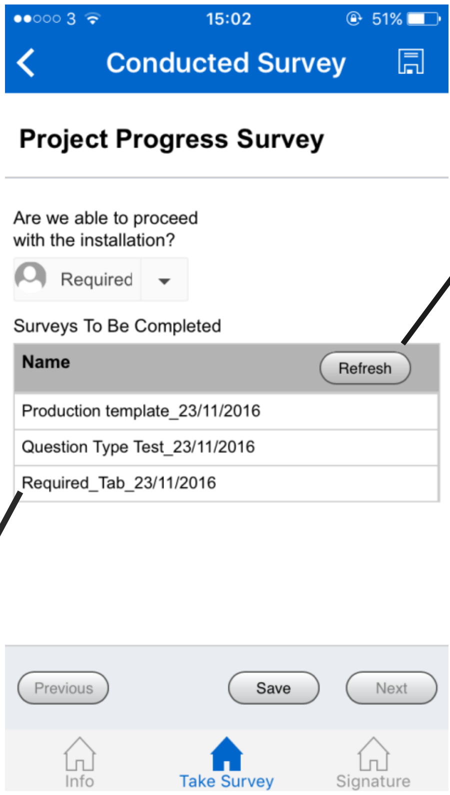


Now the Lookup has been configured, another Survey Question must be created with the Question Type set as Show Subgrid. To add this Question Type, you must first create a Survey Question and select 'Show Subgrid' on the required 'Type*' drop-down list field. The Survey Tab is a required field and the 'Question Order For Section' is also a required field.



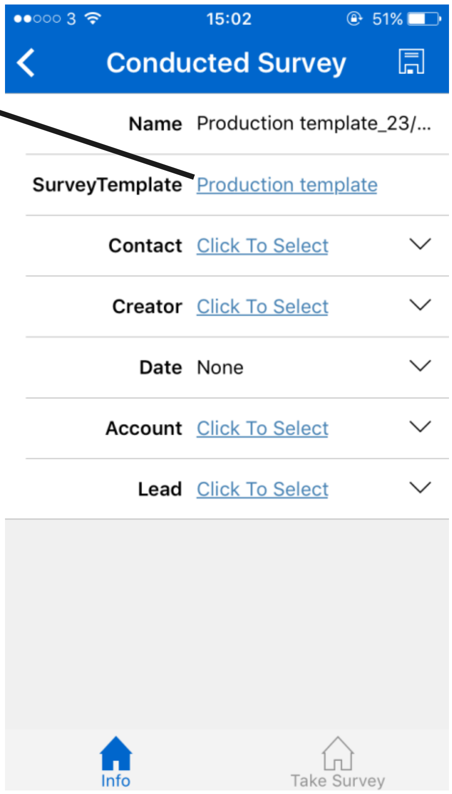
Now this has been configured, the below screenshots display this Question Type when executed in the Resco Mobile Client.





When you have selected a field from the Lookup list, click Refresh to populate the records you have selected in the Subgrid below

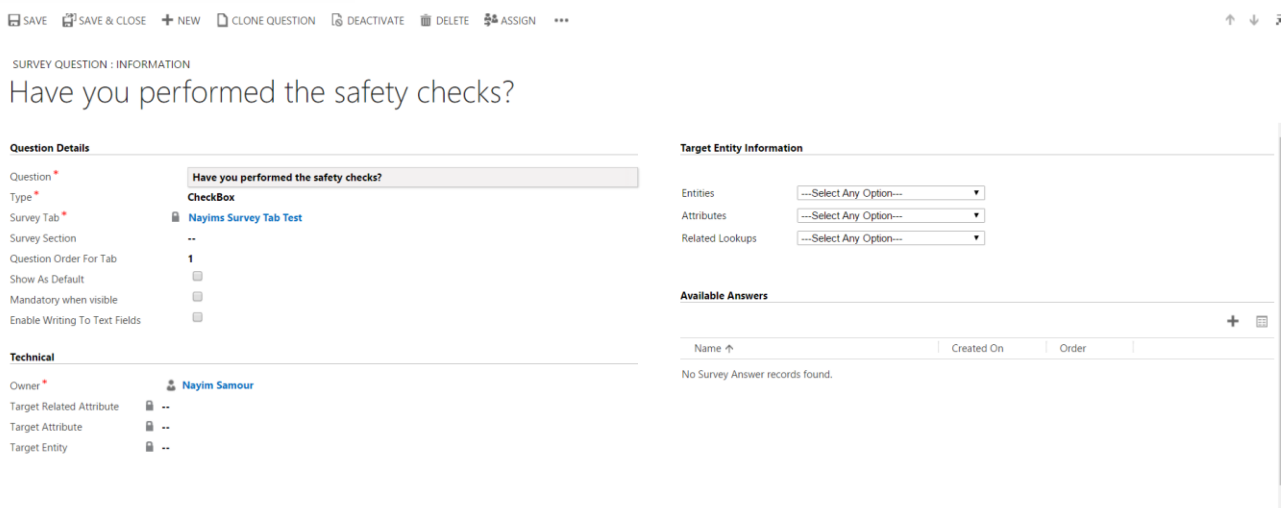
Now the Survey Templates selected from the Lookup have been populated as records in the Subgrid and by clicking the hyperlink you will be directed to that Survey



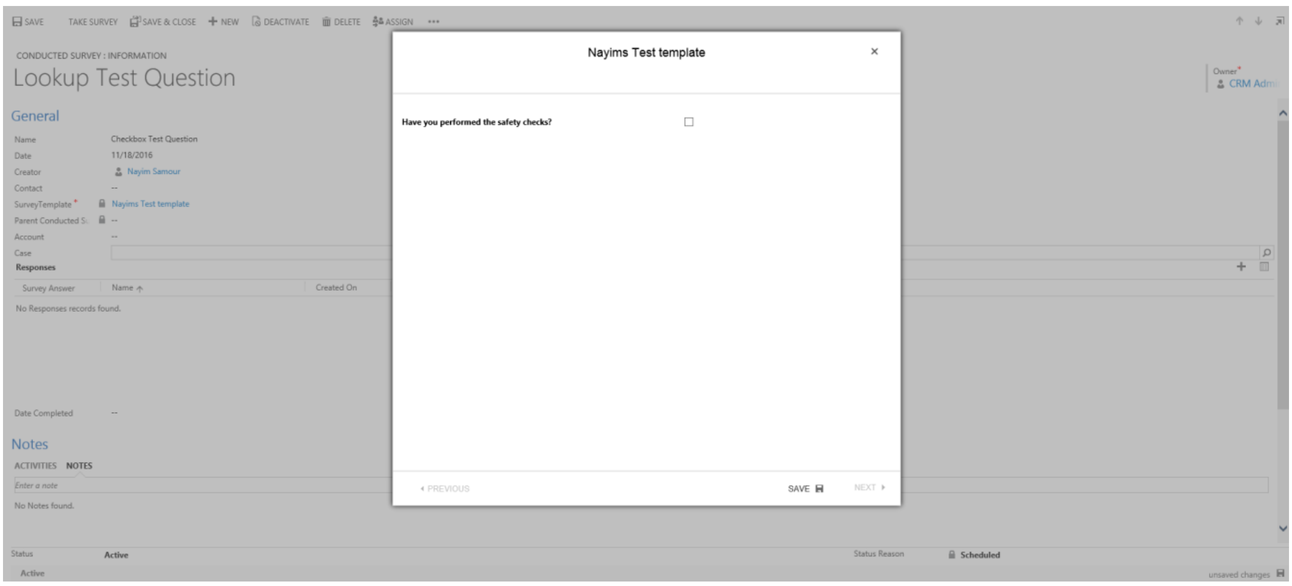
2.1.2 Checkbox

The Checkbox Question Type will usually be used when the question is acting as a prompt, in the example below the question is based around the health and safety procedures, allowing a technician to tick once he/she has performed the necessary safety checks.

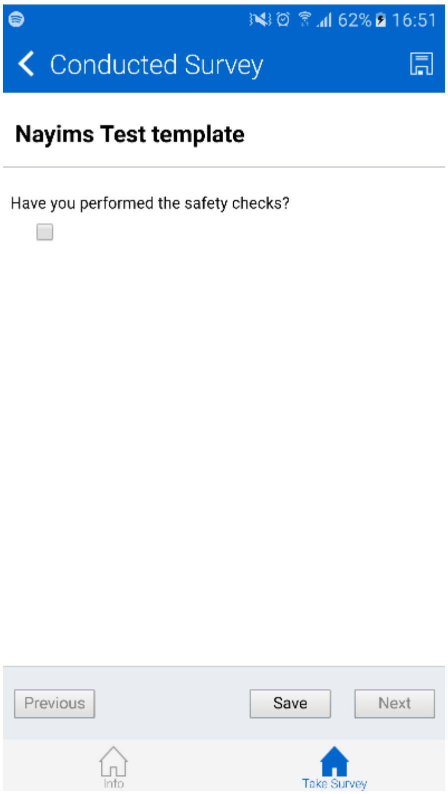
To execute this Question Type you must create a Survey Question within the Survey Tab entity and select checkbox in the “Type*” field.



Pictured below is an example of the Checkbox Question type when performed in Dynamics 365. It allows you to either check or un-check the box next to the question.

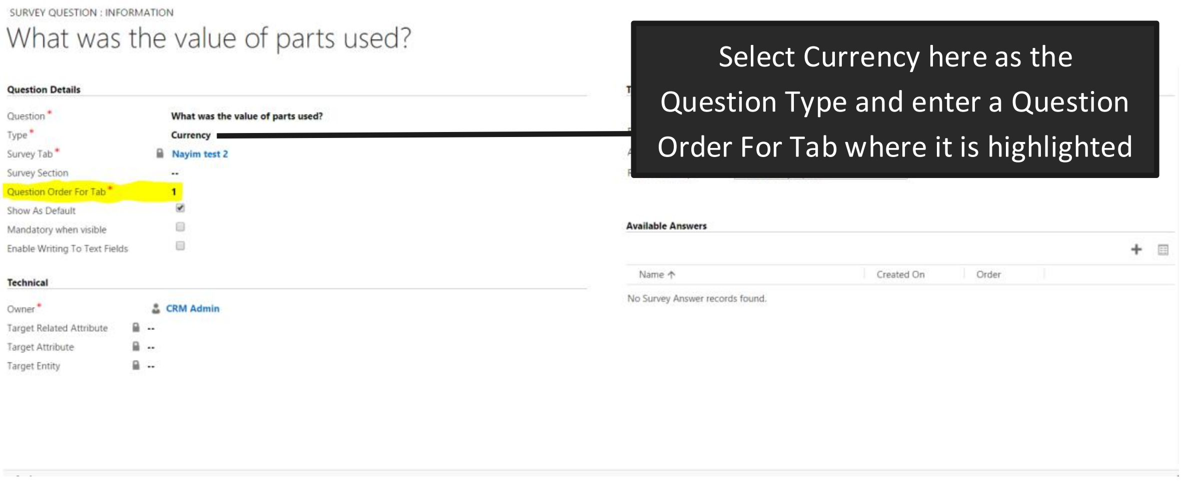


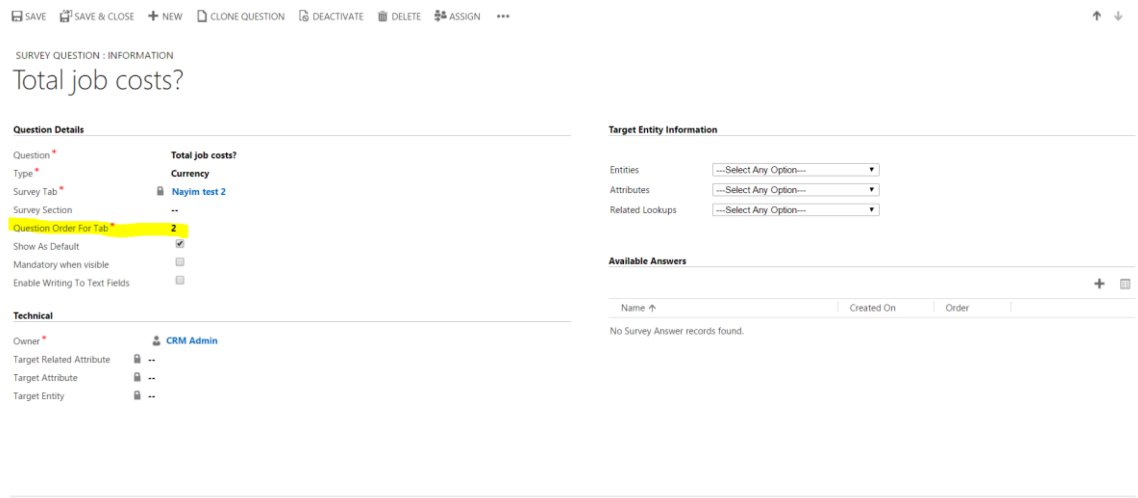
The same functionality occurs when executed in the Resco Mobile Client, displayed by the screenshot below.



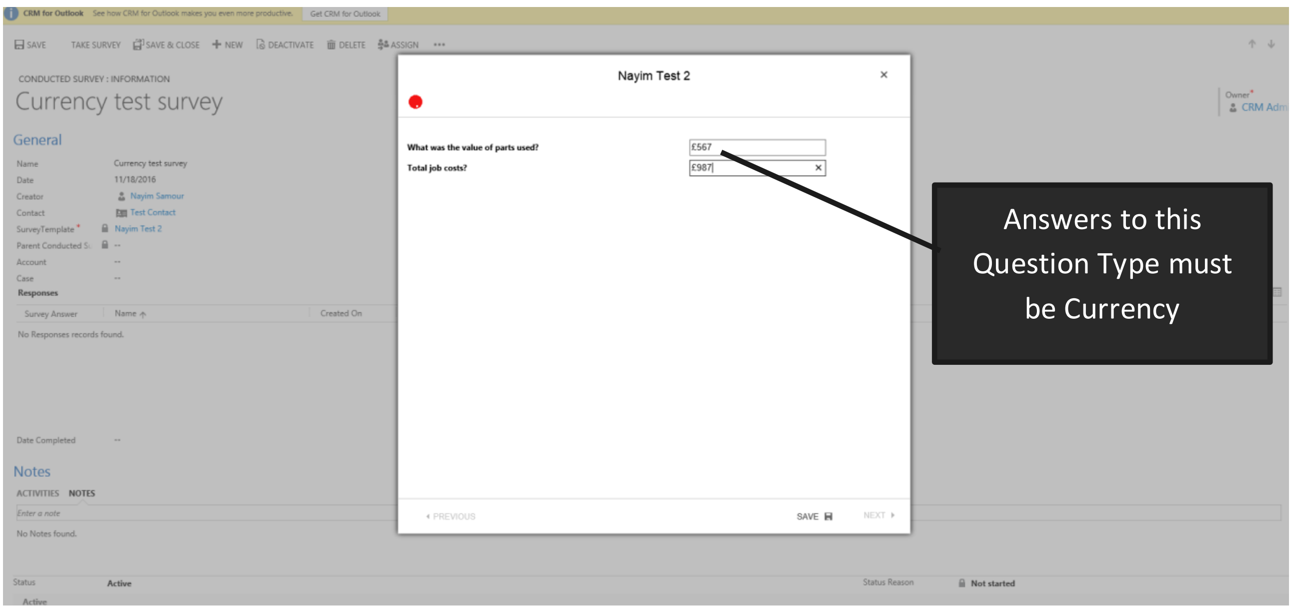
2.1.3 Currency

The Currency Question Type allows a user to propose a question that requires a currency only answer. To add this Question Type, you must first create a Survey Question and select 'Currency' from the 'Type*' drop-down list. The Survey Tab is also a required field and additionally you will need to enter an Order on the Survey Tab as well as a Question Order on the Question itself. This is particularly important if there is to be more than one question in the same survey as you will see in the examples below.

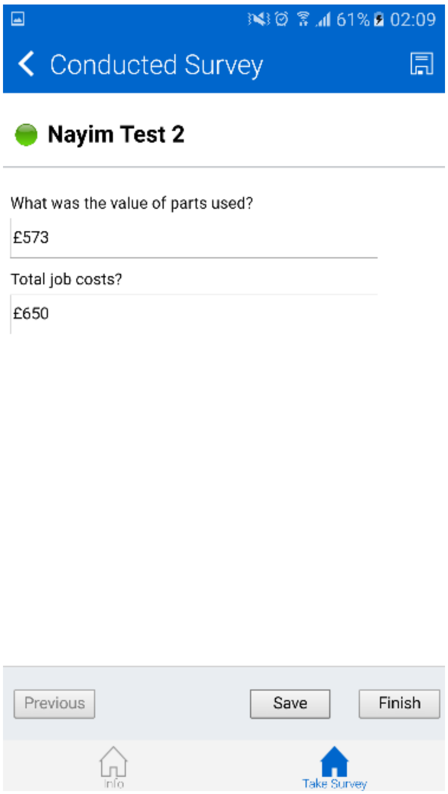




When executed within Dynamics 365, the Currency Question Type looks like this.



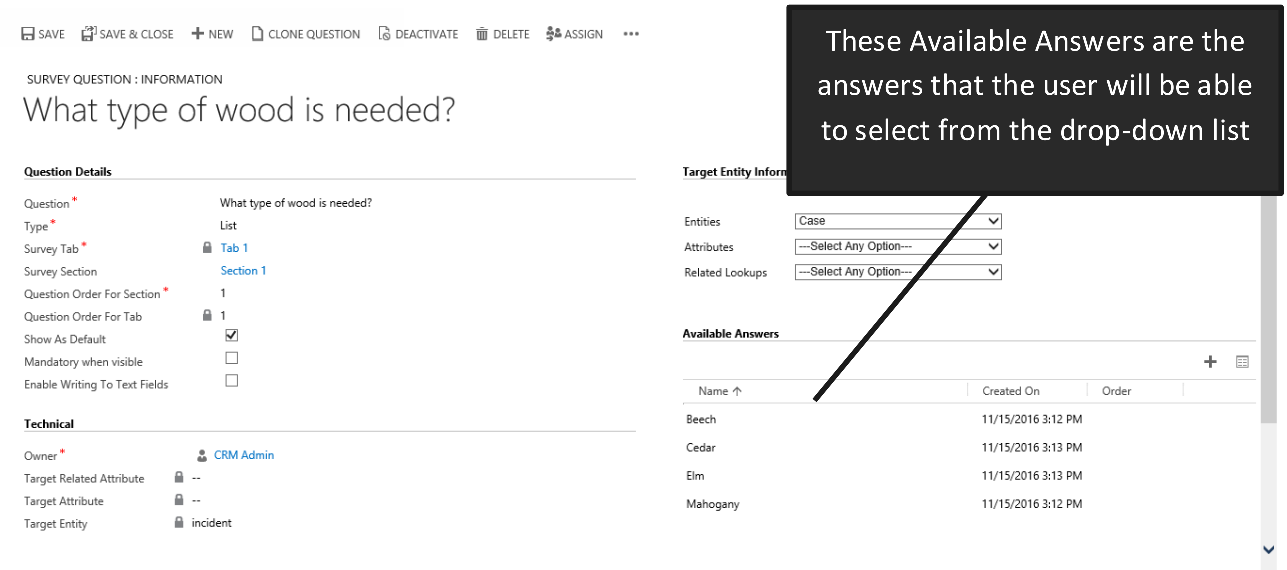
This is an example of how this Question Type could be used in a survey, if the amount of money that a technician takes in needs to be tracked etc. The below screenshot displays this same Survey being performed in the Resco Mobile Client.

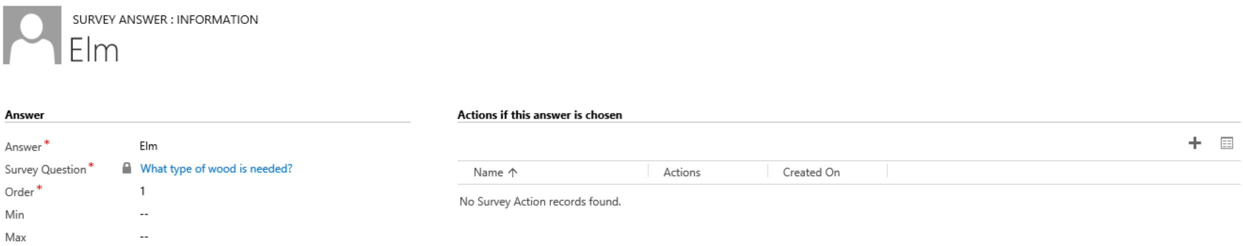


2.1.4 List

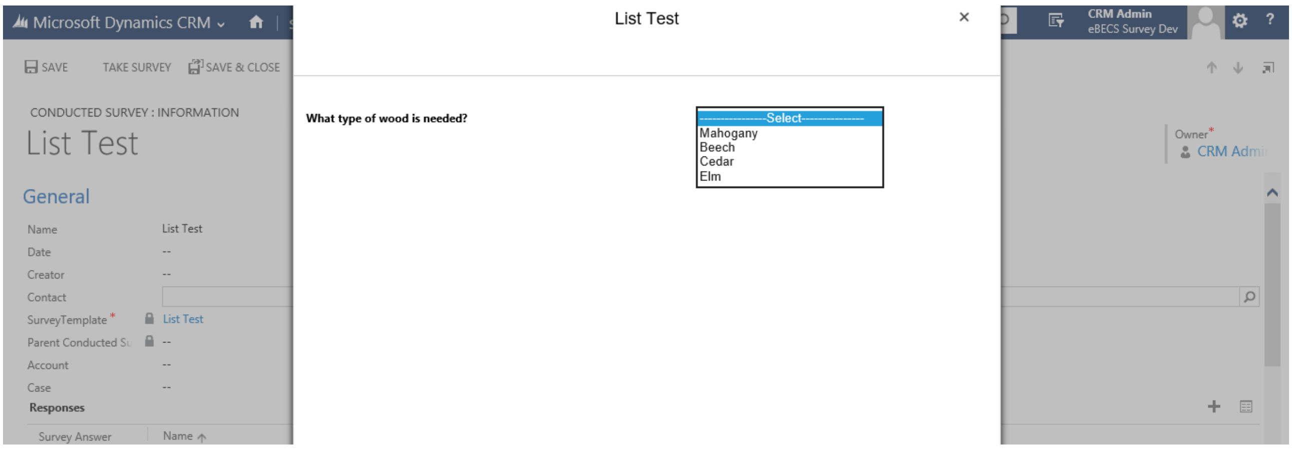
The List Question Type allows the user to have a selection of answers of which they can select one from the drop-down list.

To configure this Question Type, you must first create a Survey Question and select 'List' on the required 'Type*' drop-down list field. The Survey Tab is a required field and the Question Order on the tab is also a required field.

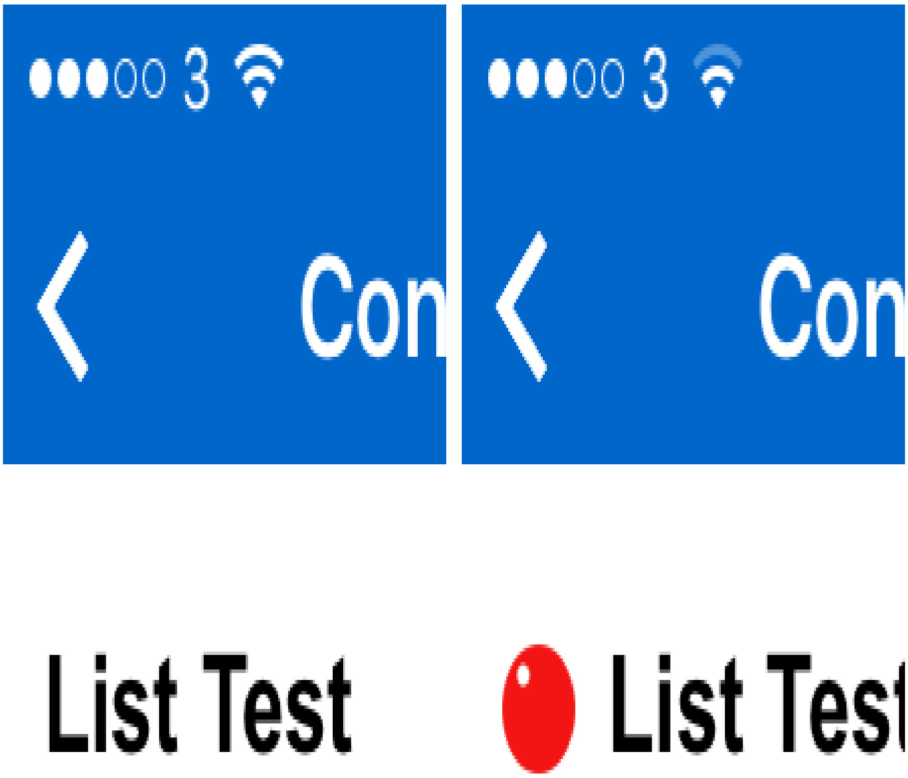




The example below shows the List Question Type executed in Dynamics 365, allowing the user to select one wood type from the list.



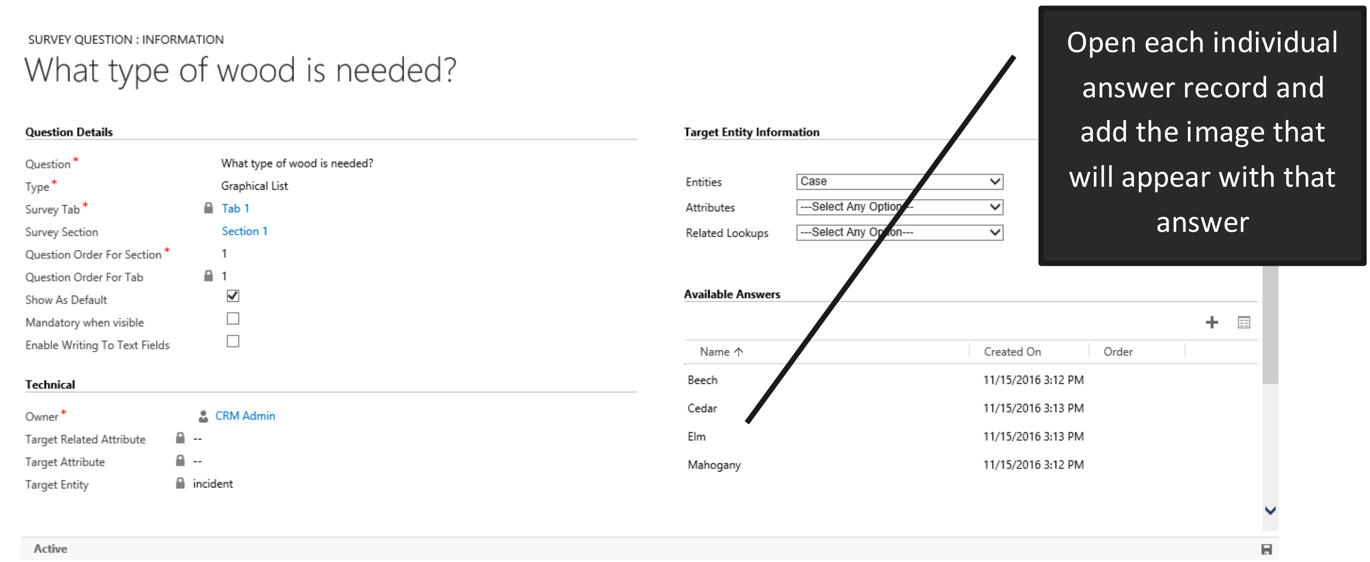
The example below shows the same List type survey question being executed in the Resco Mobile Client.



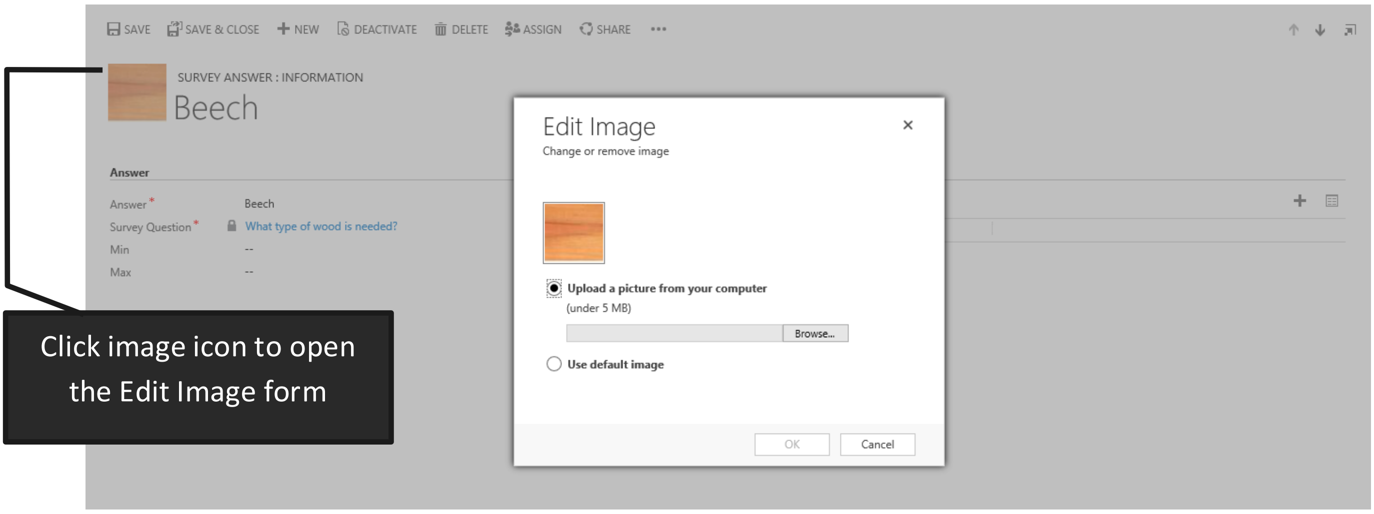
2.1.5 Graphical List

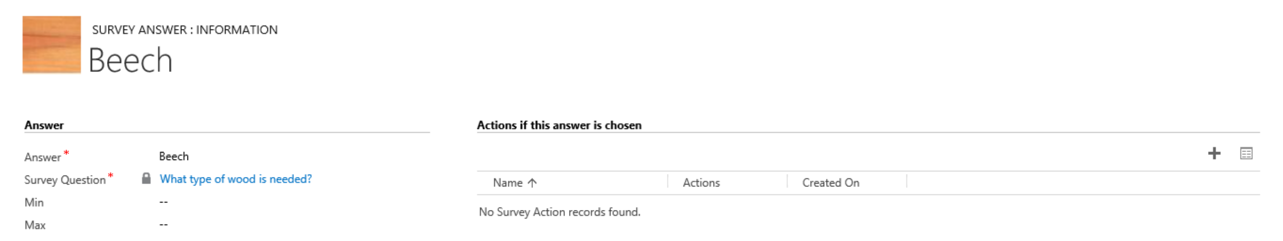
The Graphical List Question Type is very similar the above Question Type List, but the Graphical List allows the user to show an image next to each answer. This is utilised best when showing an image along with text is more appropriate than showing just selections of text.

To configure this Question Type, you must first create a Survey Question and select ‘Graphical List’ on the required ‘Type*’ drop-down list field. The Survey Tab is a required field and the question order on the tab is also a required field.

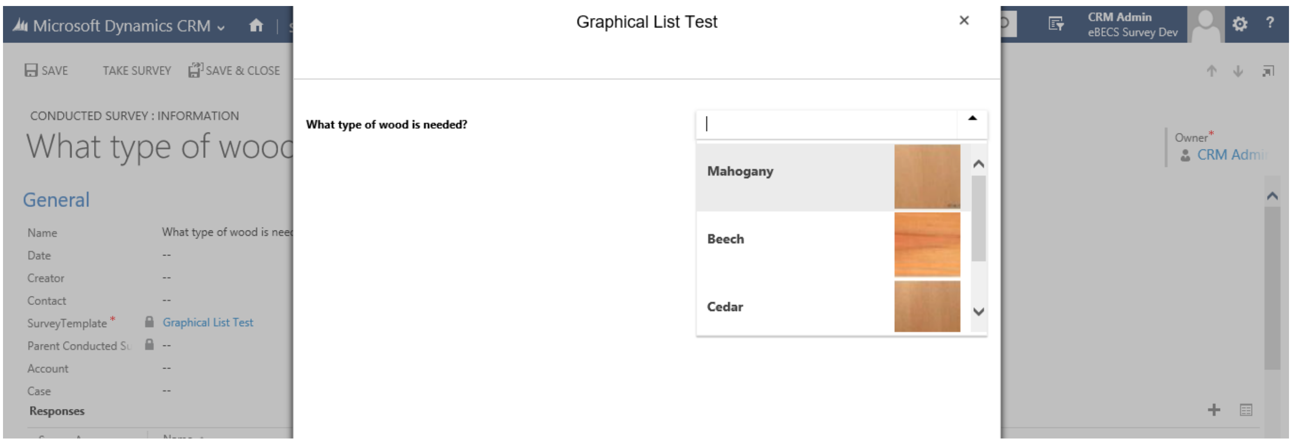


To attach an image to an answer, you must first save the answer and then add the image. The only required field is 'Answer*', which is the text which will appear next to the image on the list. The image can be added by clicking the icon, browsing for your appropriate image and selecting OK.

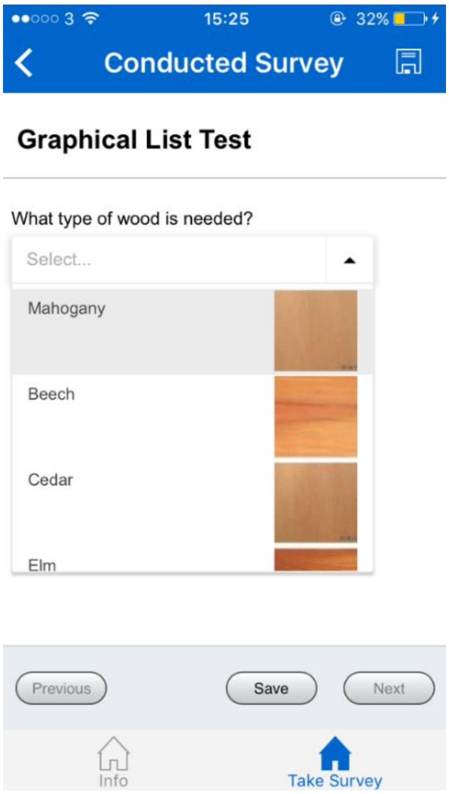




The example below shows the Graphical List Question Type executed in Dynamics 365, with each type of wood showing the user (in this case the technician) an image of each type of wood they can select from the list.

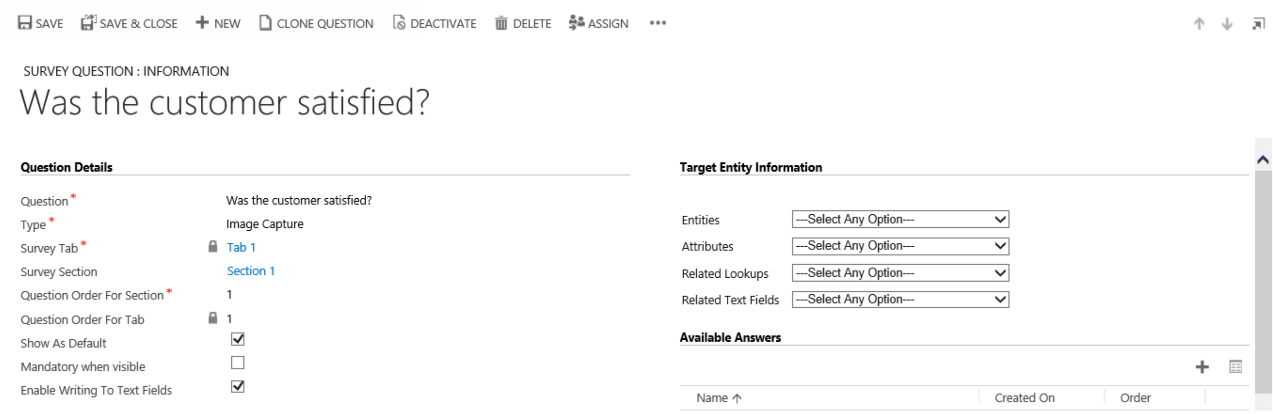


The example below shows the same survey being performed in the Resco Mobile Client.

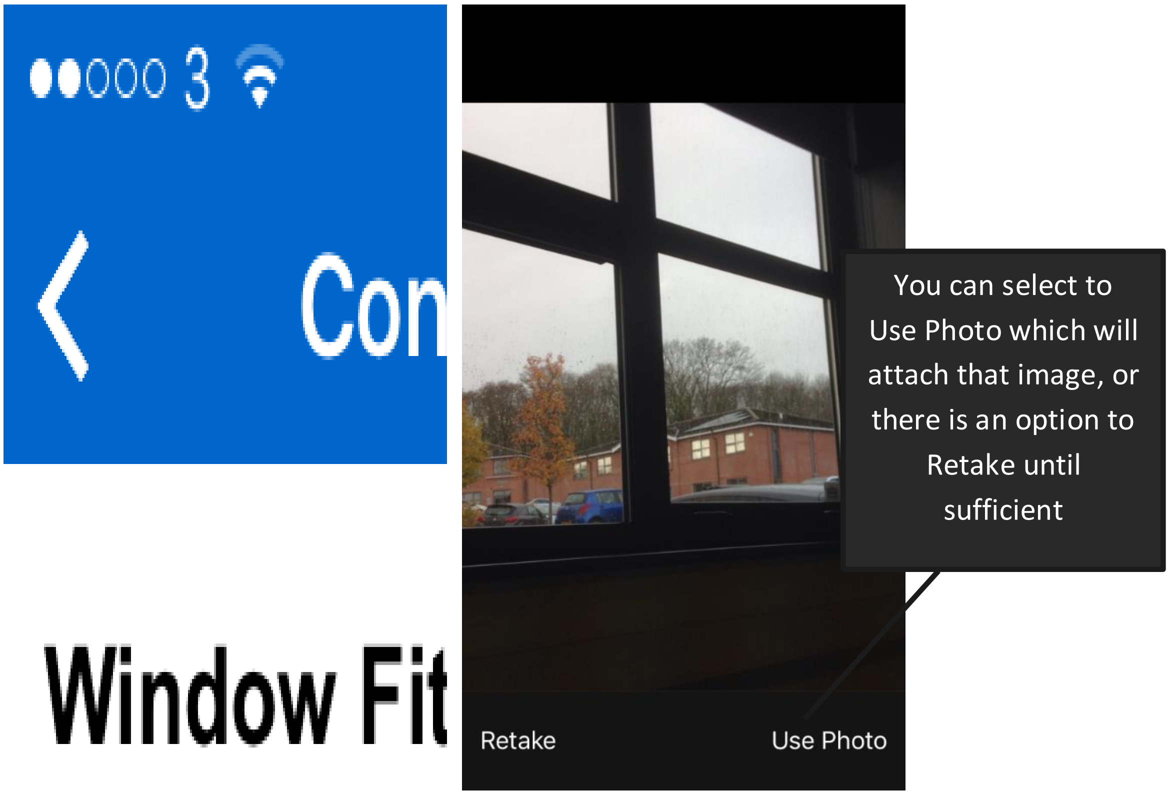


2.1.6 Image Capture

The Image Capture Question Type is solely for use with the Resco Mobile Client and allows the user to take a picture and attach it to that question on the Survey. For instance, this could be used by a field-based technician to show work that has been completed or a picture of the site. To add this Question Type, you must first create a Survey Question and select 'Image Capture' on the required 'Type*' drop-down list field. The Survey Tab is a required field and the 'Question Order For Section' is also a required field. No answers need to be added for this Question Type to be configured.



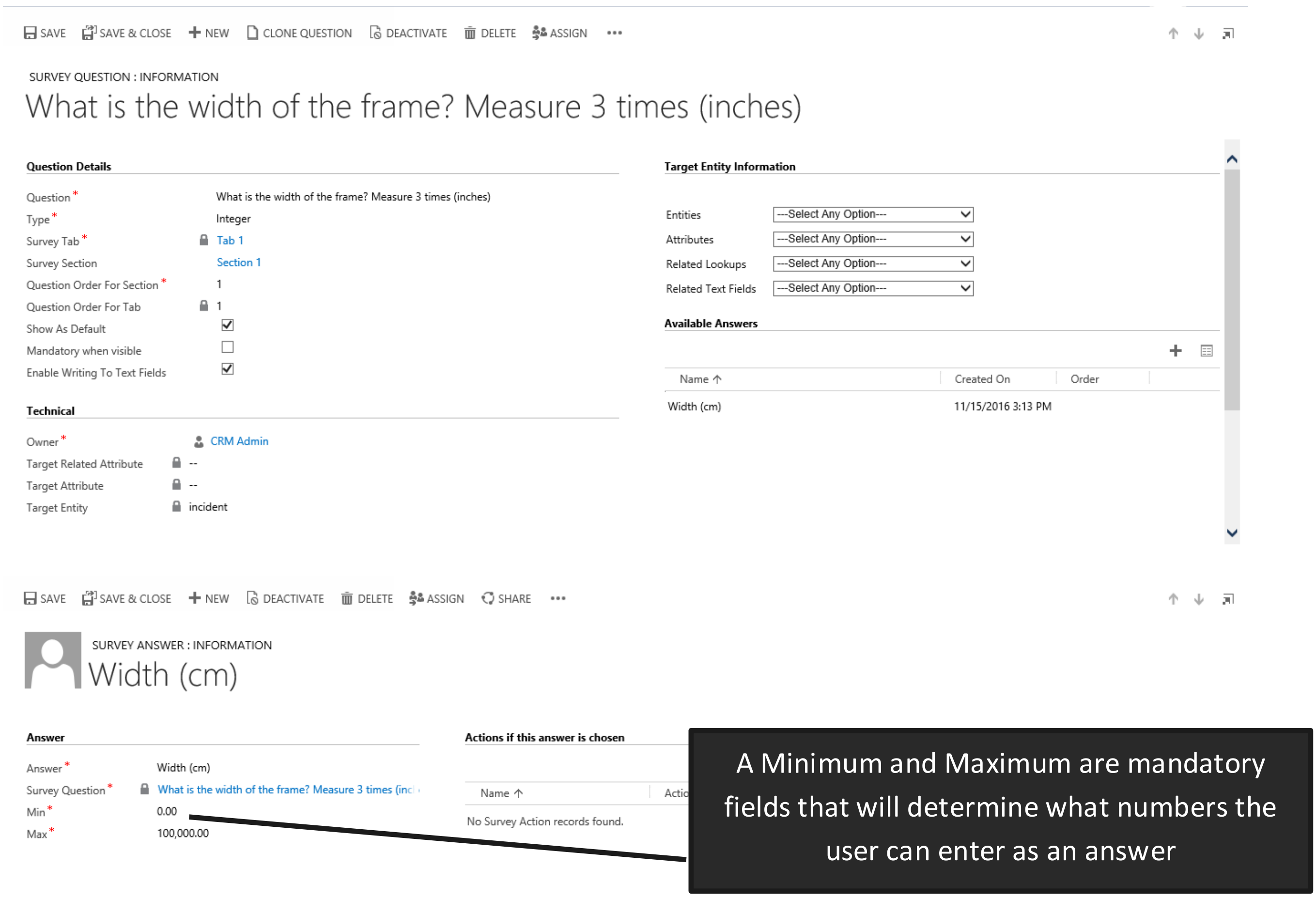
As shown below, the Image Capture allows the user to execute this Question Type on the Resco Mobile Client by capturing an image and saving it to that question.



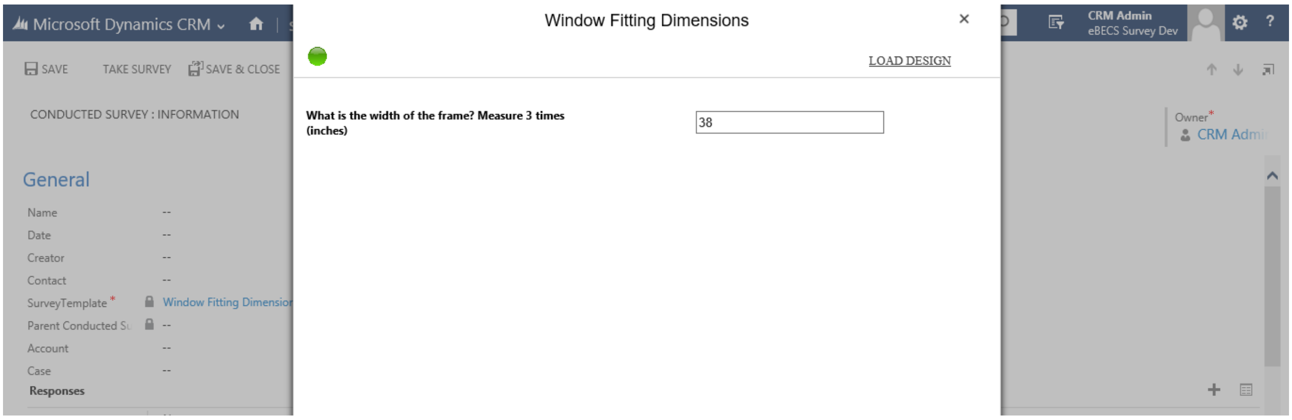
2.1.7 Integer

The Integer Question Type is designed specifically for questions where answers must be a whole number (no decimals, fractions) and the user is required to choose both a specific minimum and maximum value that the answer must be within to configure. When a number is entered that is outside the allocated answer range, the user will be notified to enter a number that is within the range. There is no functionality to add a type or system of measurement but including this in the question is a simple way to make use of this Question Type to its potential.

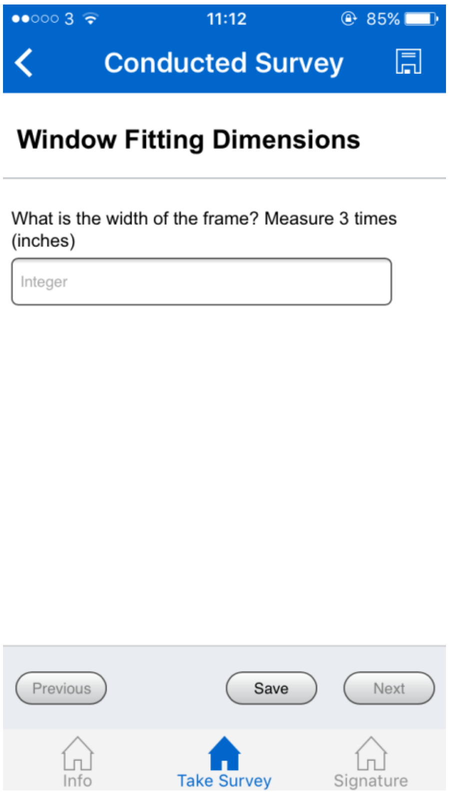
To configure this Question Type, you must first create a Survey Question and select 'Integer' on the required 'Type*' drop-down list field. The Survey Tab is a required field and the 'Question Order For Section' is also a required field as seen below.

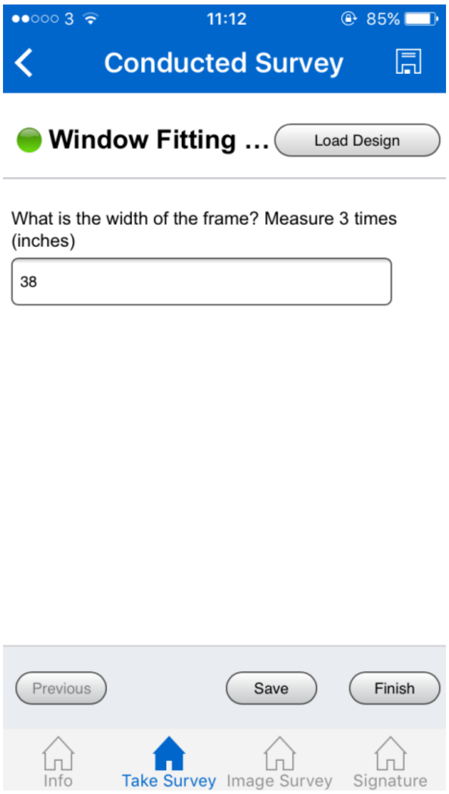


Below is an example of the Integer Question Type being executed in Dynamics 365. The functionality only allows the user to enter numbers, no other characters can be entered.



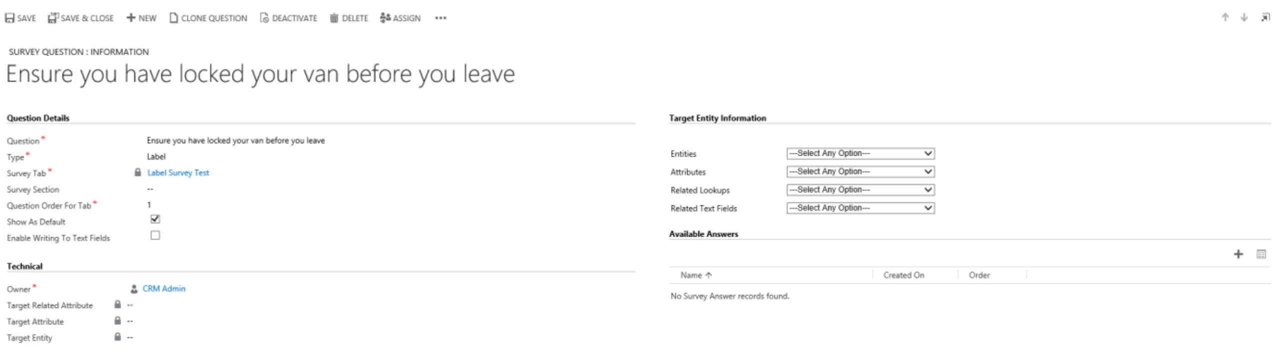
Below is an example of this same Survey being performed and the Integer Question Type being used in the Resco Mobile Client.



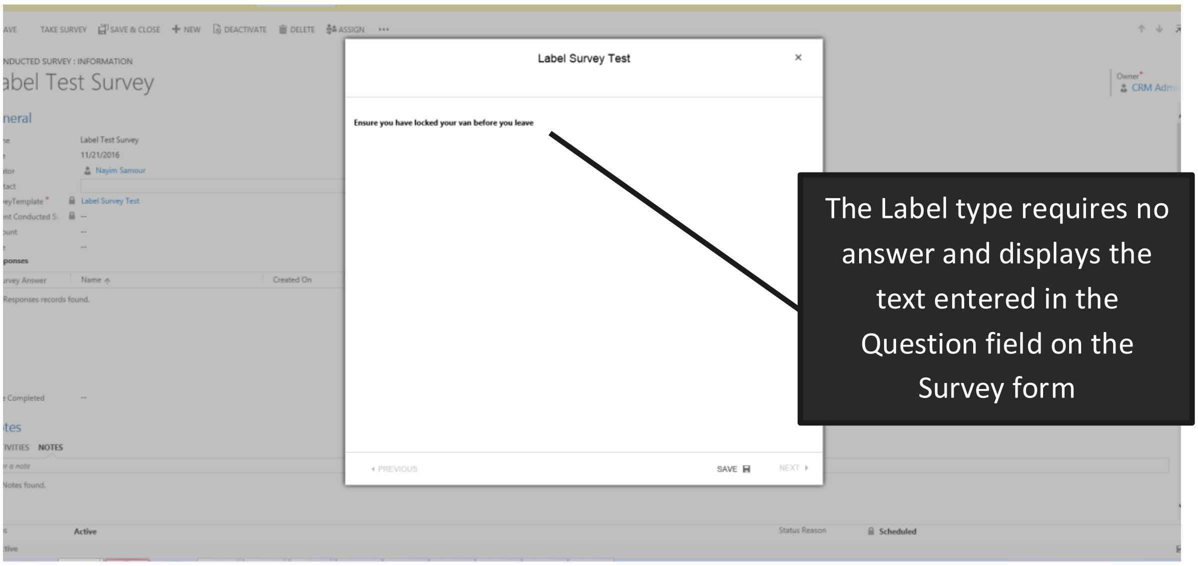


2.1.8 Label

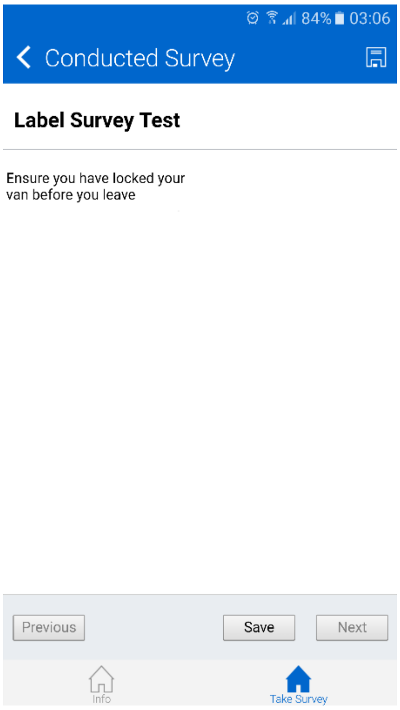
The Label Question Type is used if you wish to give the person using the mobile client a set of instructions. An example of this may be "ensure you have locked your van before you leave". To select this Question Type, you need to select 'Label' from the 'Type*' drop-down list. After that as with all other Question Types you must set the question to appear as default and give the question an order number. The screenshot below shows this configuration on the form.



This is what the survey will look like when it is performed in Dynamics 365 (with this Question Type there is no required response from the user outside of completing the action that is detailed).

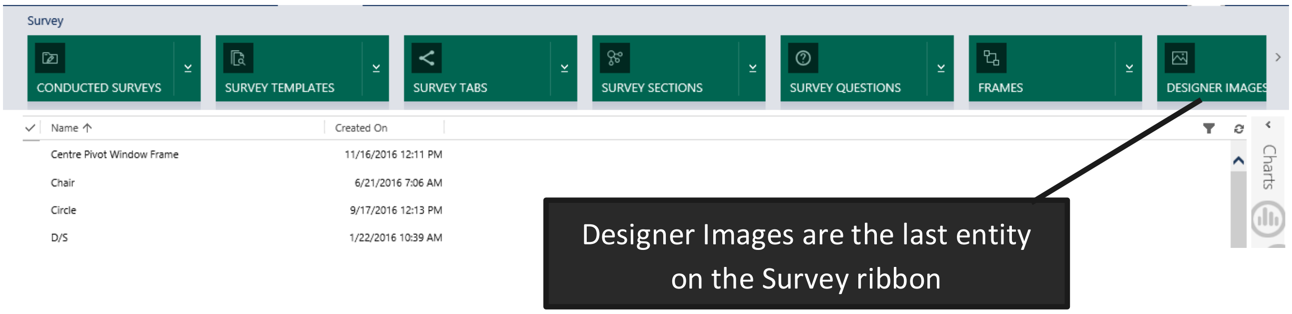


When this Question Type is performed within the Resco client it will look like this, in this case it is leaving a message for the Driver.

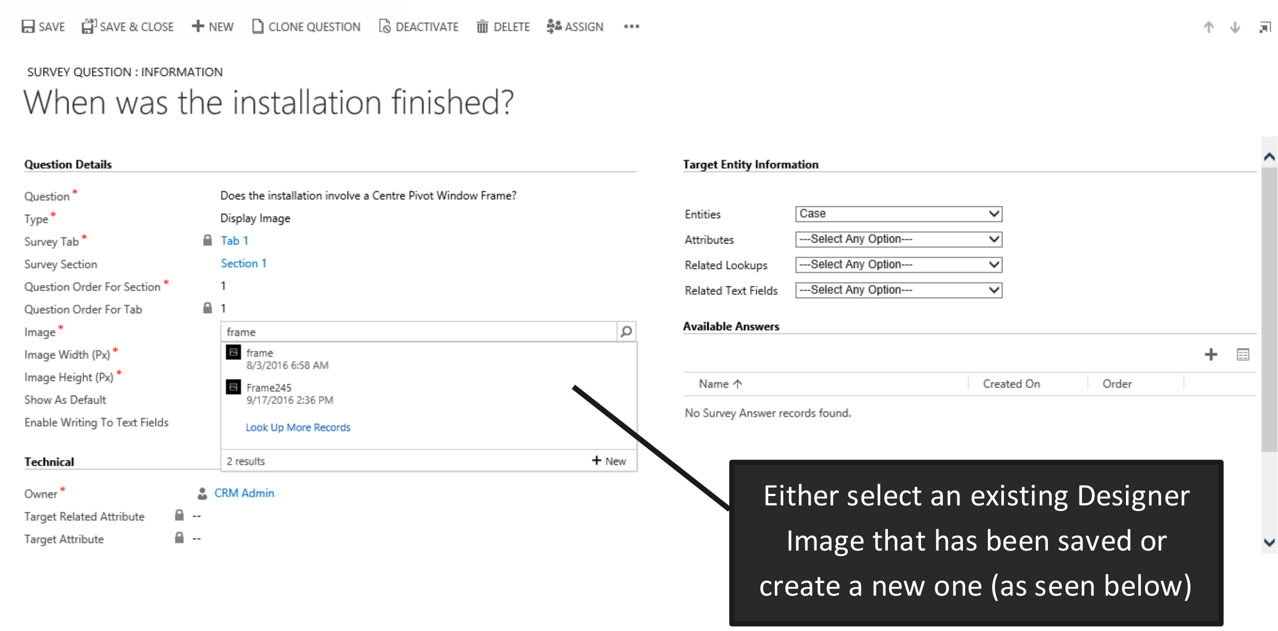


2.1.9 Display Image

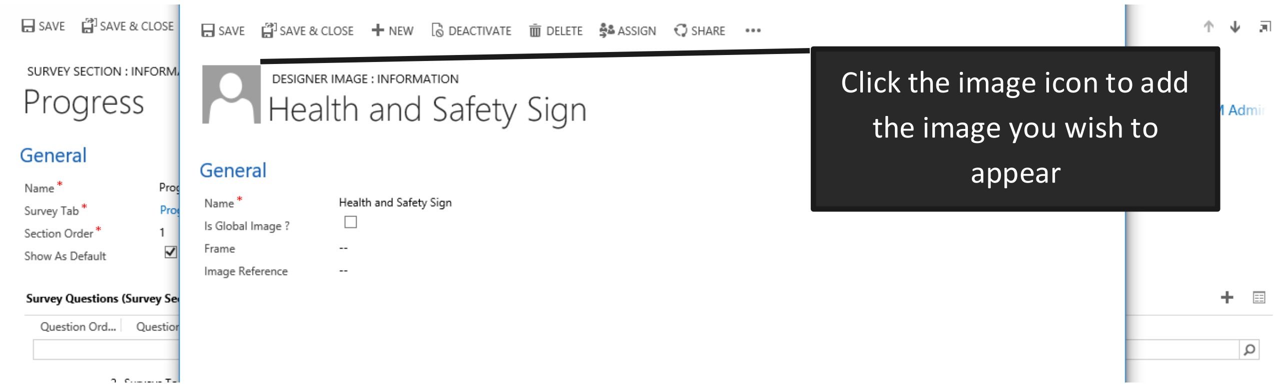
The Display Image Question Type allows you to add an image to the survey. Question, Type and Survey Tab are all required alike to previous questions but in addition, Image, Image Width and Image Height become required when this type is selected. To configure this Question Type and add an image to the form, a 'Designer Image' must be created which is essentially the image that will be shown on the survey. A Designer Image can be created by either locating the Designer Images entity in the Survey ribbon (as seen below) or you can go down to the bottom of Lookup list in the Image field and select new.

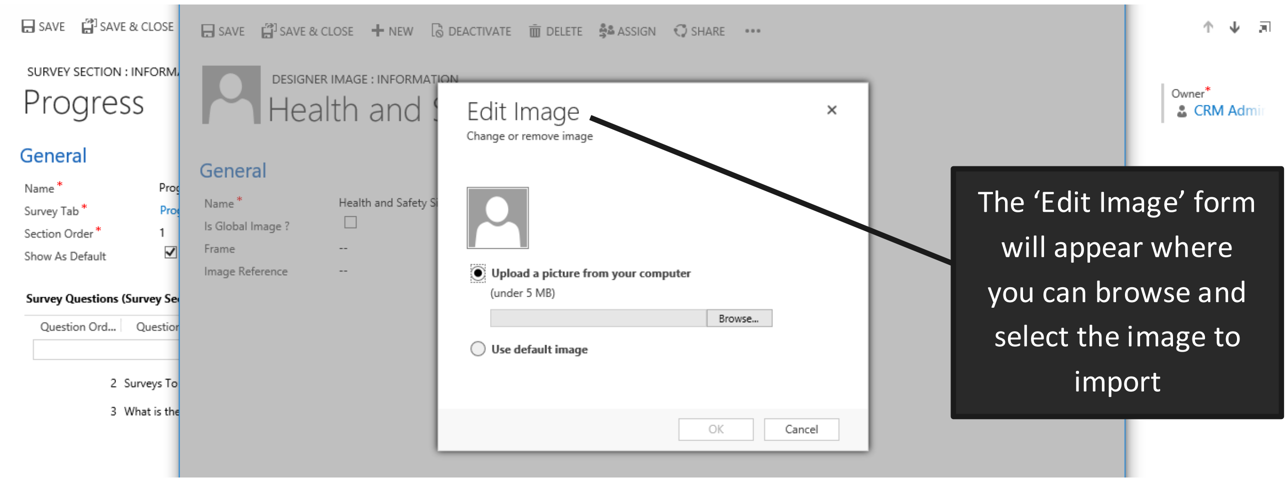


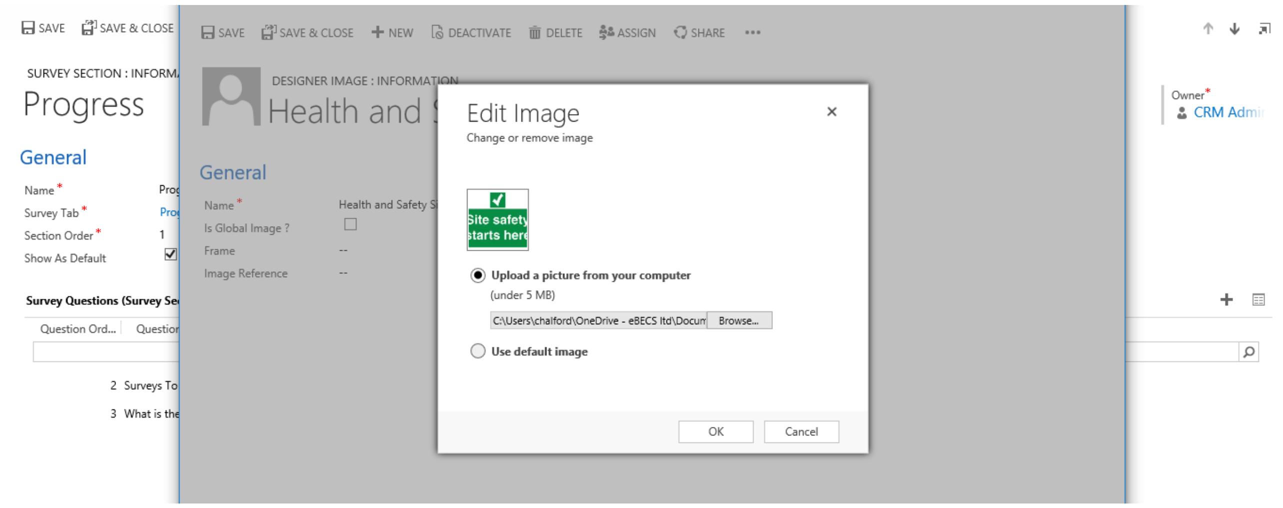
Like other Question Types, you must create a Survey Question and select 'Display Image' on the required 'Type*' drop-down list field. The Survey Tab is a required field and the 'Question Order For Section' is also a required field. When 'Display Image' has been selected, the following required fields will appear: 'Image', 'Image Width (Px)' and 'Image Height (Px)'.



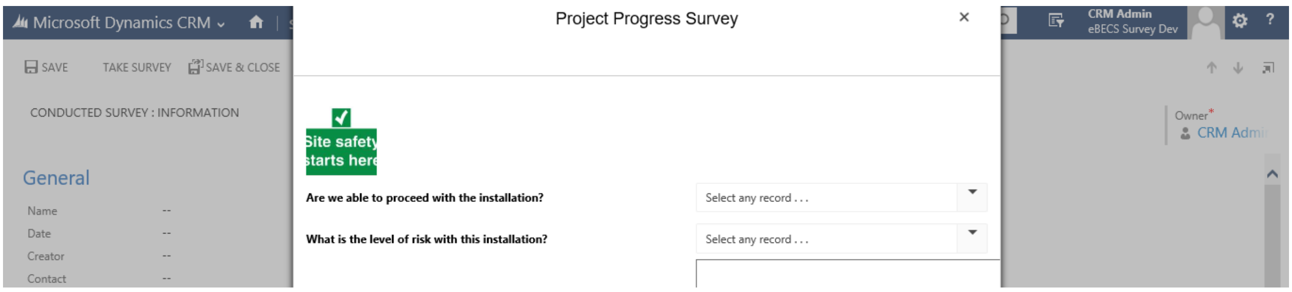
After navigating to a new Designer Image record, you must give the image a name (required) and you can add the image to the icon next to the name, alike to adding an image to the Graphical List answers as shown earlier in the guide. The below screenshot displays the screen and form for adding a designer image.



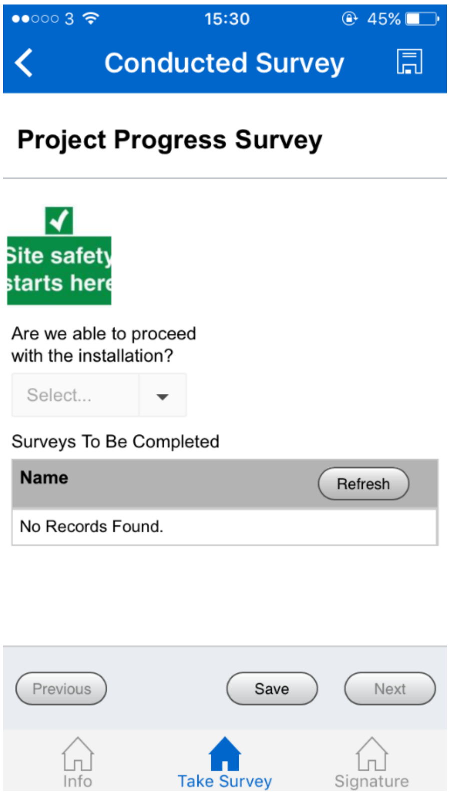




When this is performed in Dynamics 365, the following is shown.

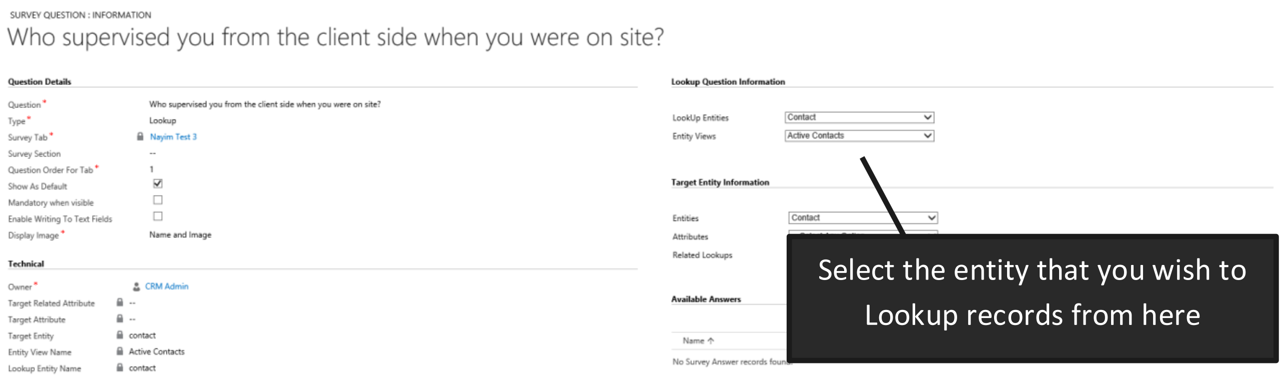


When this is executed in the Resco Mobile Client, the functionality is similar and the image is shown.

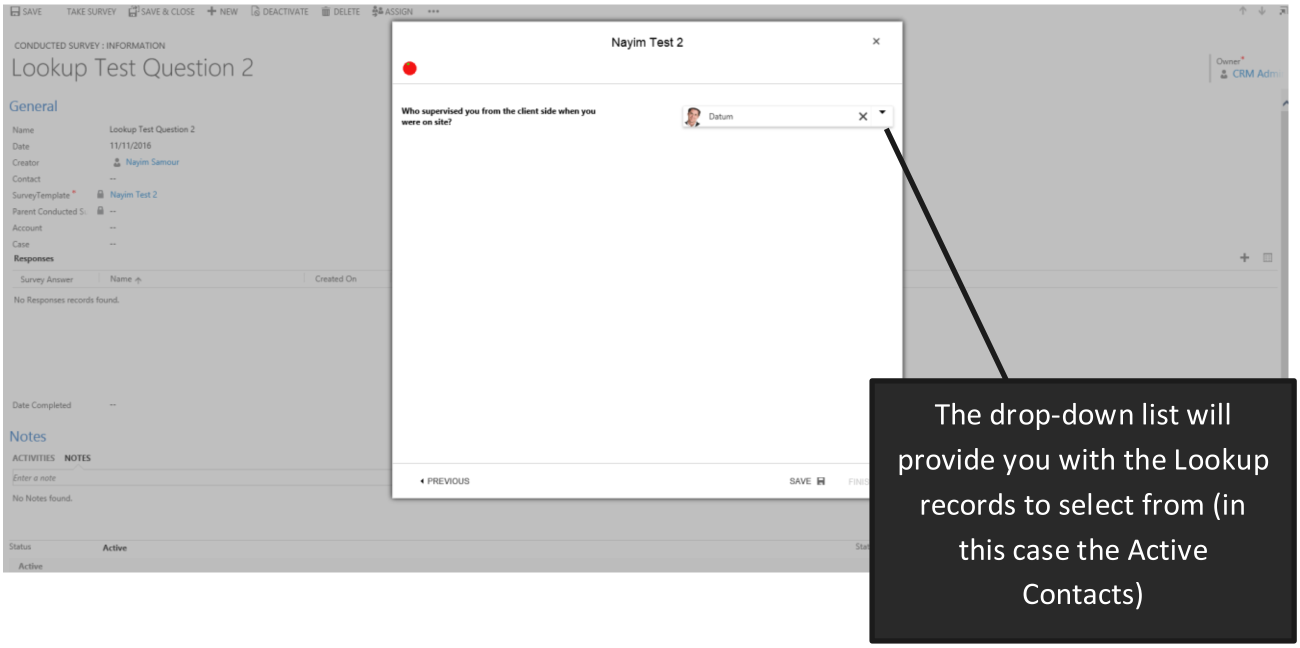


2.1.10 Lookup

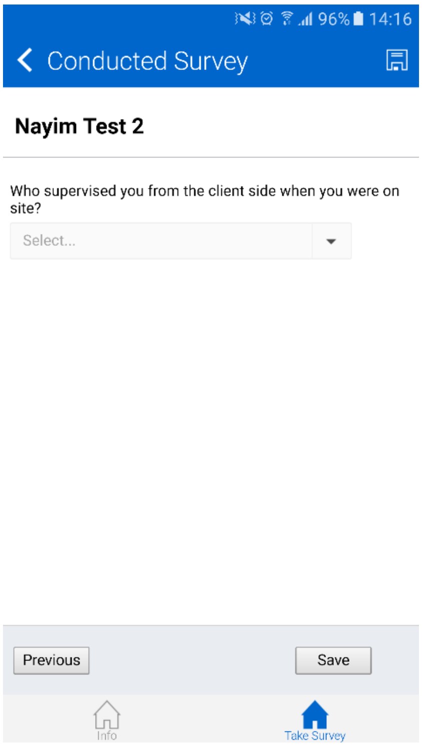
The Lookup Question Type allows. The user to select an answer that is related to a specific record in the Dynamics 365 system. An example of this is: "Who supervised you when you were on site?" To which the lookup question would be set to active contacts and the technician on site can choose which contact was the main point of contact throughout the day. To configure this Question Type, you must first create a Survey Question and select 'Lookup' on the required 'Type*' drop-down list field. The Survey Tab is a required field and the 'Question Order For Tab' is also a required field.

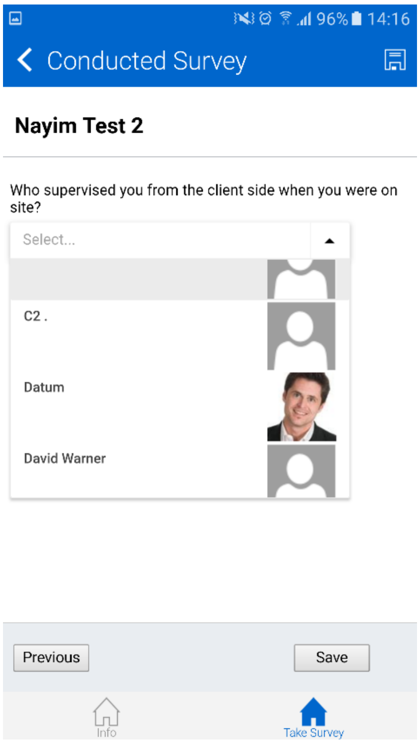


When performed in Dynamics 365, the below functionality will occur. The user will be able to select from the drop-down list which is a Lookup to the entity records and select the answer they wish.



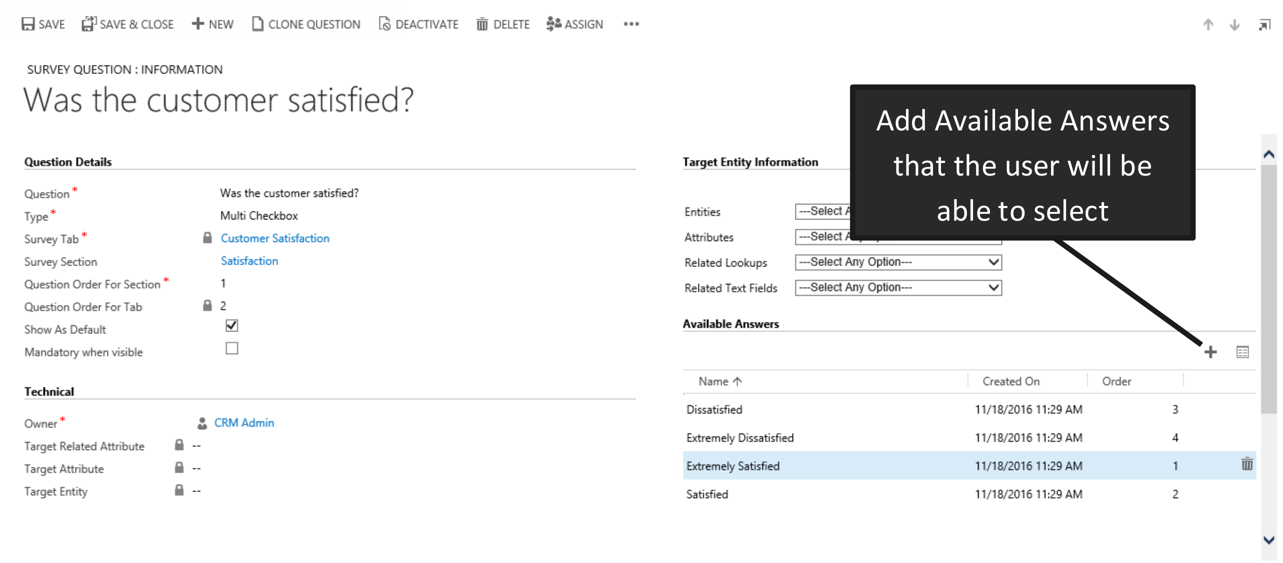
The below screenshot displays this Question Type being performed in the Resco Mobile Client. As you can see, by selecting the drop-down, the list of answers appears for the user to choose from.

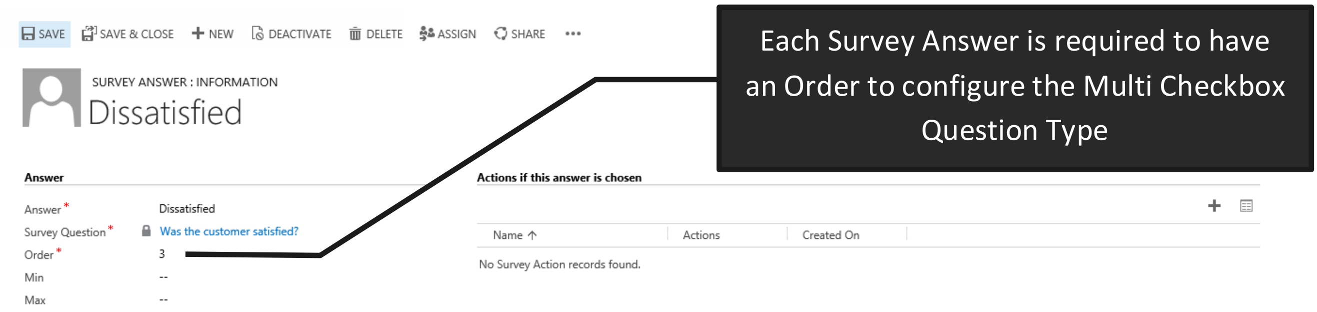




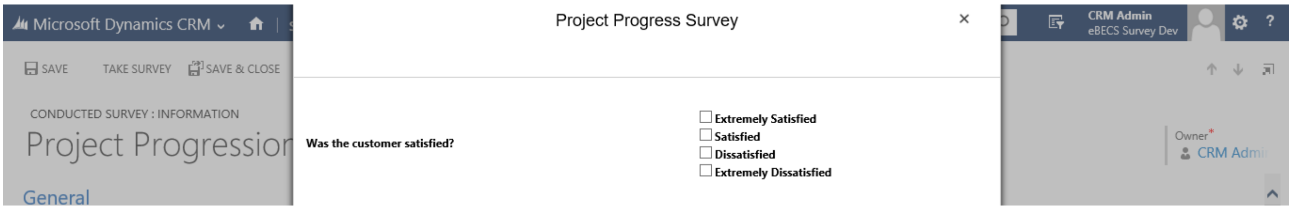
2.1.11 Multi Checkbox

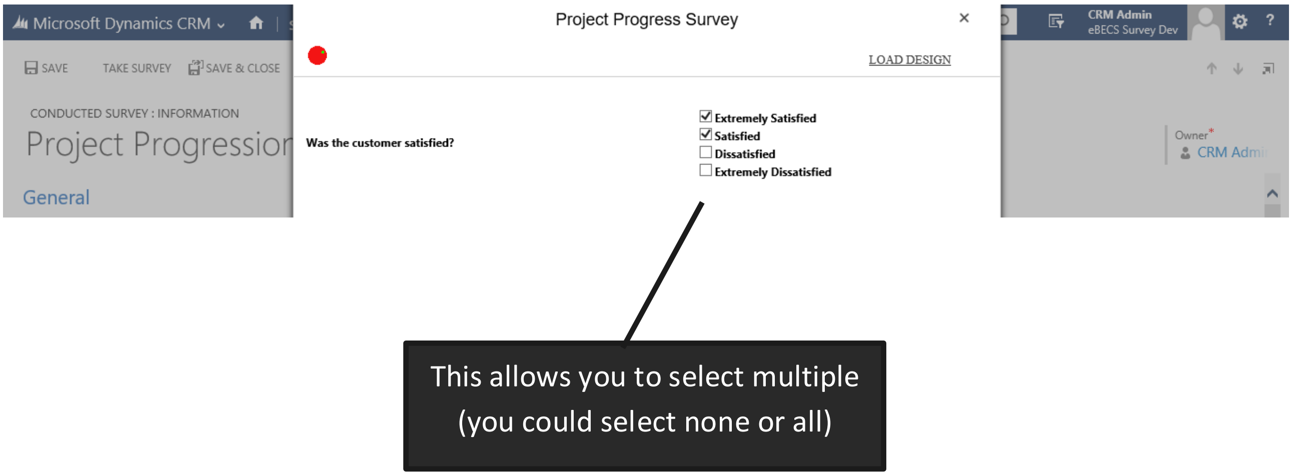
The Multi Checkbox Question Type is like the Checkbox functionality but allows the user to select multiple checkboxes, rather than just one. To configure this Question Type, you must first create a Survey Question and select 'Multi Checkbox' on the required 'Type*' drop-down list field. The Survey Tab is a required field and the 'Question Order For Section' is also a required field. For this Question Type, each answer that the user will be able to select must be created and saved as an Available Answer and each answer must be given an Order for the question to be configured.



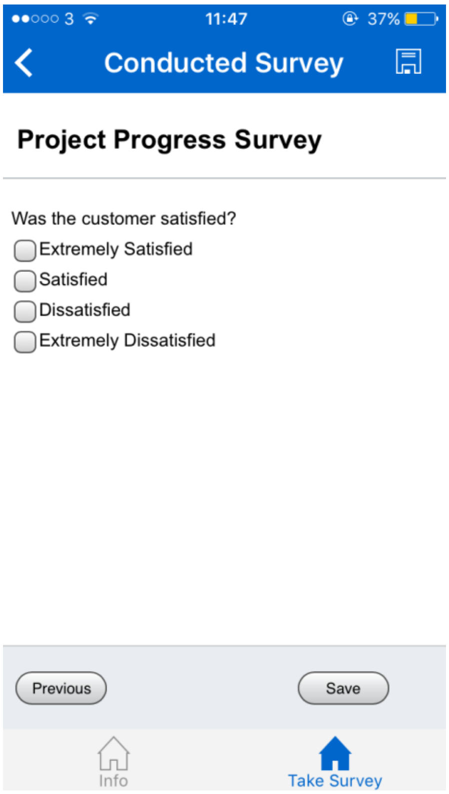


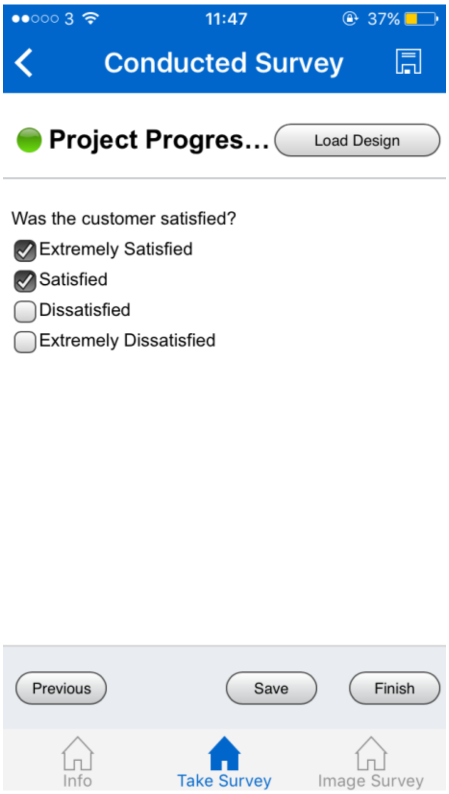
When executed in Dynamics 365, the Multi Checkbox Question Type provides the functionality as below.





The below screenshot illustrates the same survey being performed with the Resco Mobile Client, with this example showing the user selecting two of the Checkboxes.

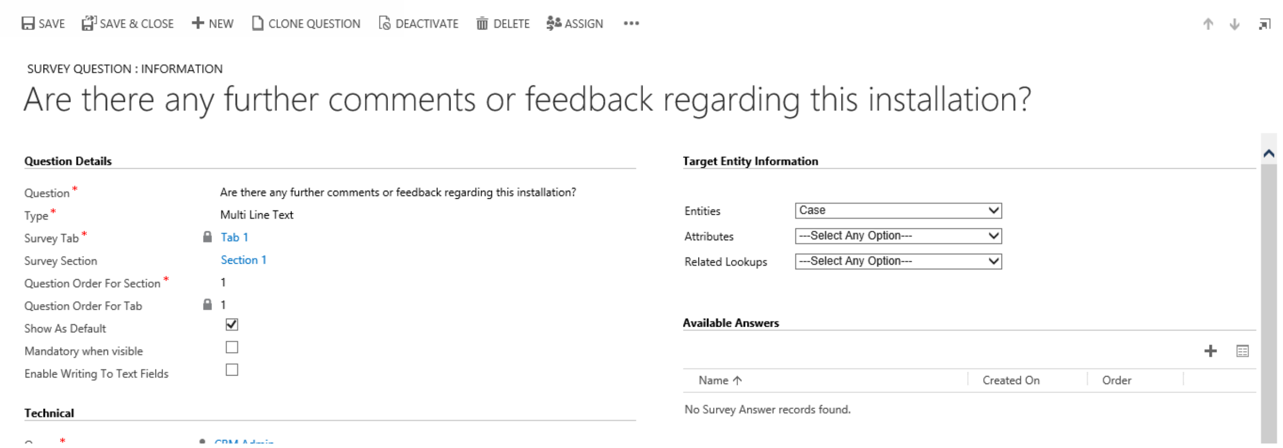




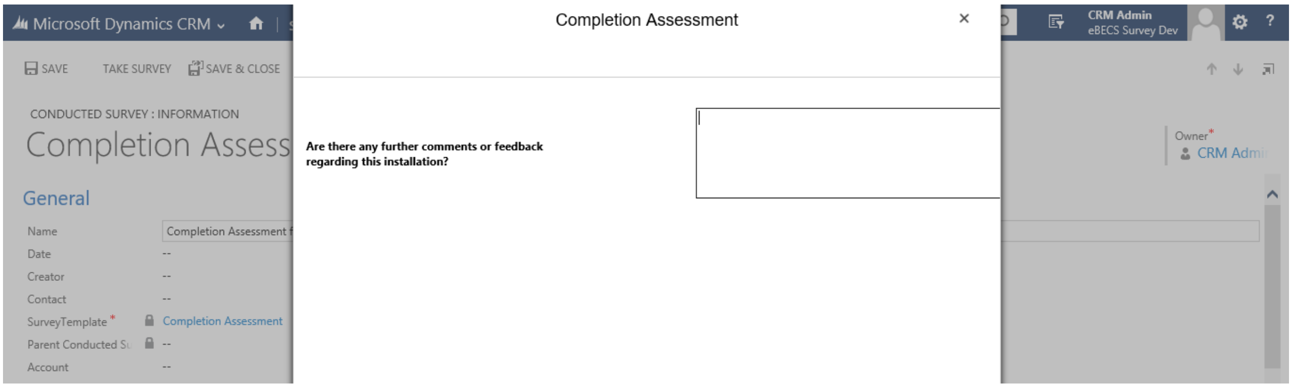
2.1.12 Multi Line Text

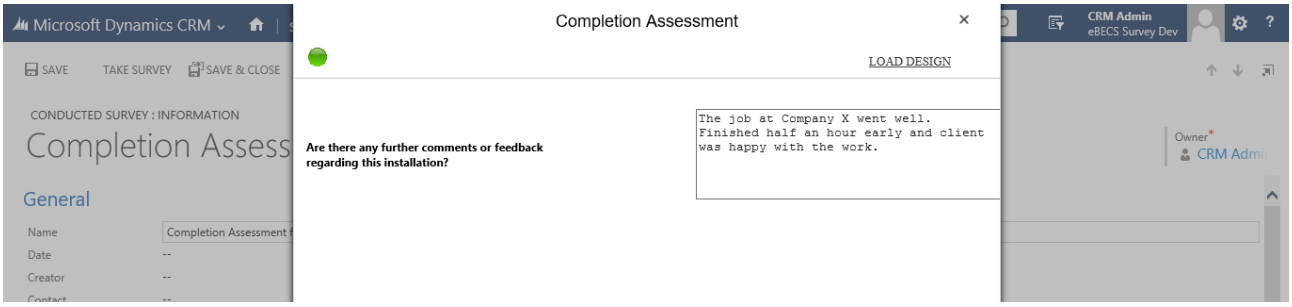
The Multi Line Text Question Type allows the user to enter multiple lines of text as an answer. This is utilised well when the user would like to enter more data regarding an answer, particularly when each answer would be unique to that survey. For instance, a comments section or feedback section are appropriate ways of employing the Multi Line Text option for questions.

Similarly, to other Question Types, this is configured by selecting Multi Line Text as the Type* and entering the Question* in the appropriate field. The Survey Tab is a required field and the 'Question Order For Section' is also a required field. In this case, it could be something as simple and short as 'feedback' in the question field. Again, a 'Question Order For Section' is a required field that must be filled in. The below screenshot shows this configuration on the survey question form in the scenario of a technician who has just completed the job required.

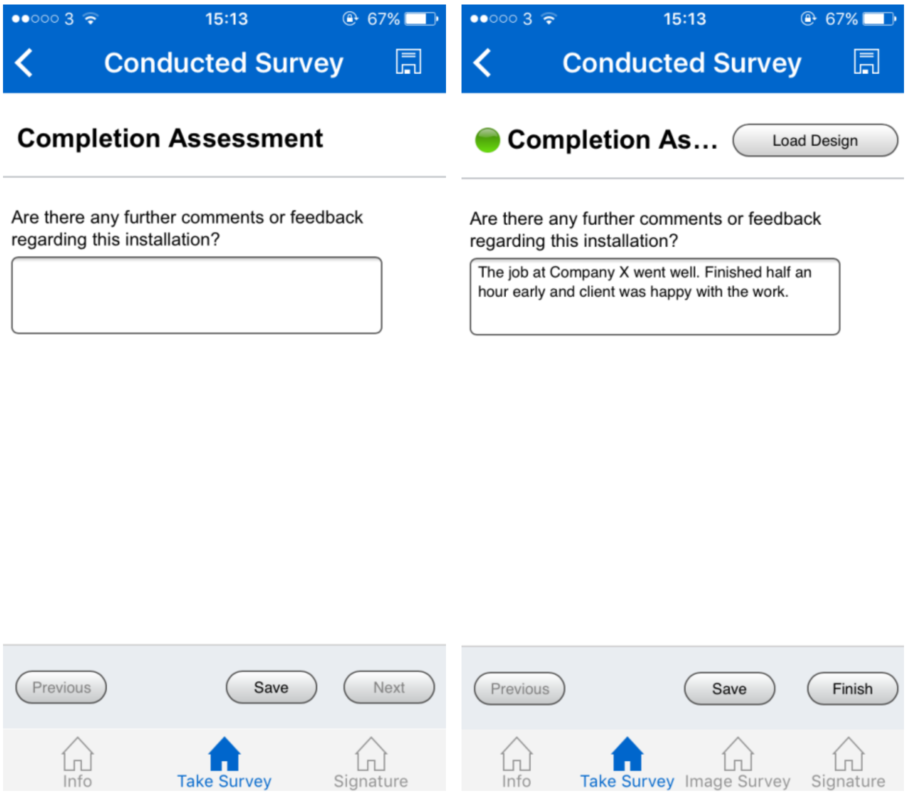


The below screenshot illustrates this Question Type being performed in a survey in Dynamics 365, allowing the user to enter multiple lines of text as an answer. In this case to provide a summary of the job completion assessment for any additional detail that may be unique to that specific job.





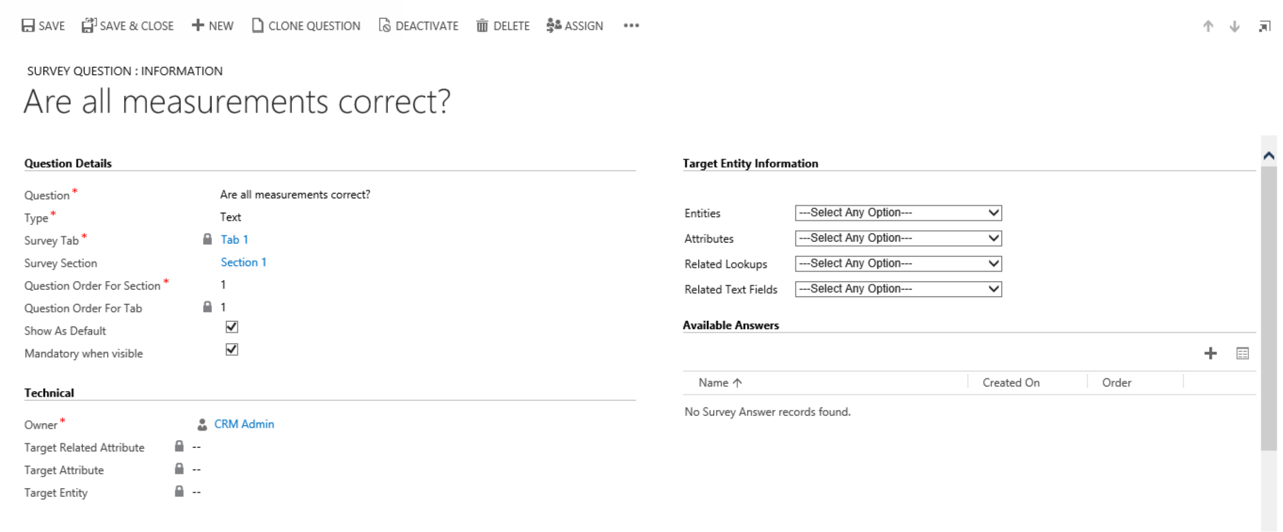
The below screenshot displays the Multi Line Text Question Type being executed within a survey on the Resco Mobile Client.



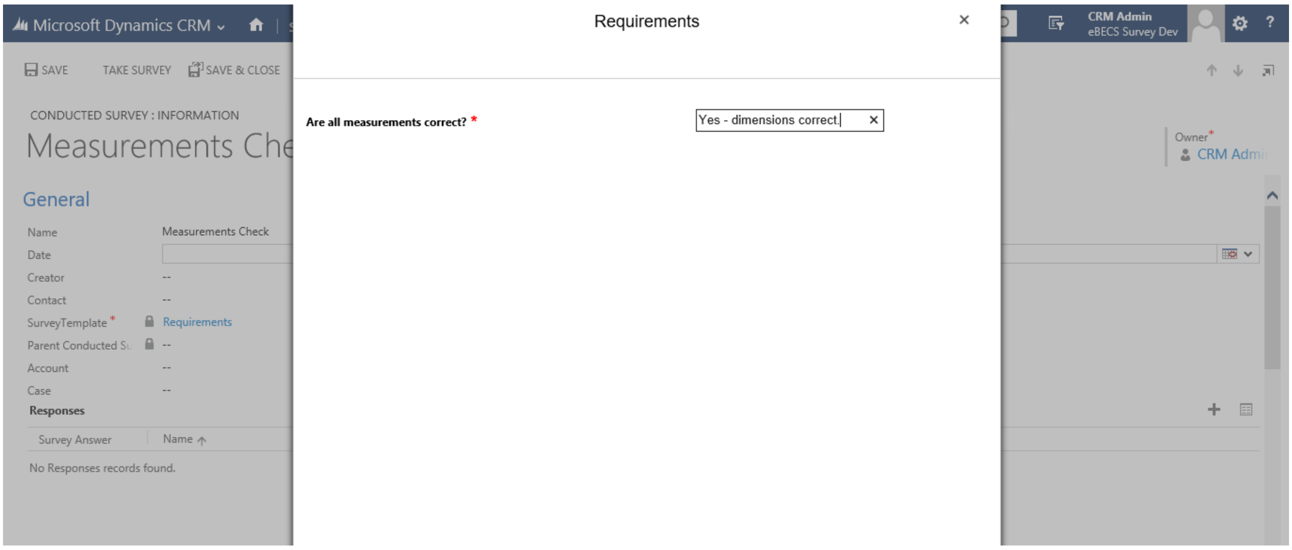
2.1.13 Text

The Text Question Type is simple but effective, allowing the user to answer the question with a line of text. To configure this Question Type, you must first create a Survey Question and select 'Text' on the required 'Type*' drop-down list field. The Survey Tab is a required field and the 'Question Order For Section' is also a required field.

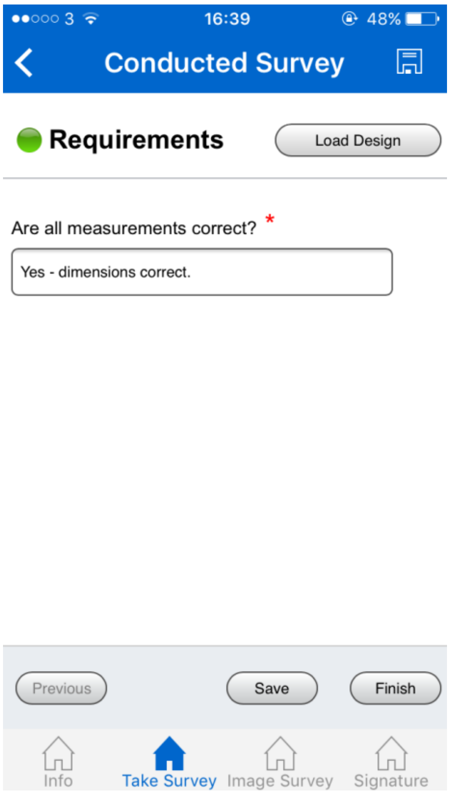
This is best utilised where the range of answers may be too diverse for a List or a Lookup and it is appropriate for the user to enter their own answer, albeit a short answer that can be entered on to one line.



The below screenshot shows the Text Question Type being performed in Dynamics 365.

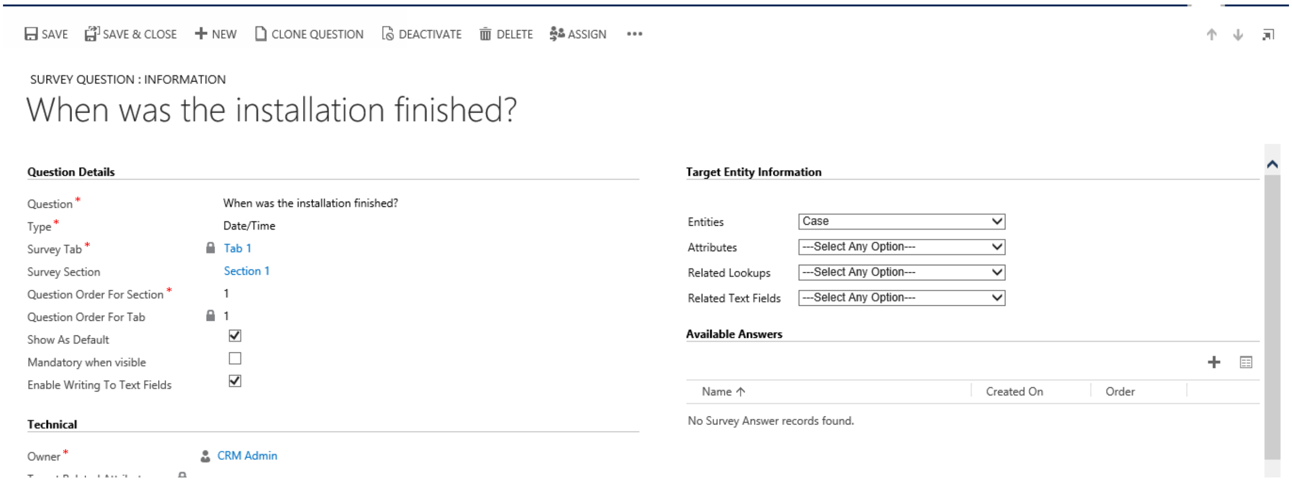


The below screenshot showcases this Question Type being used in the Resco Mobile Client.

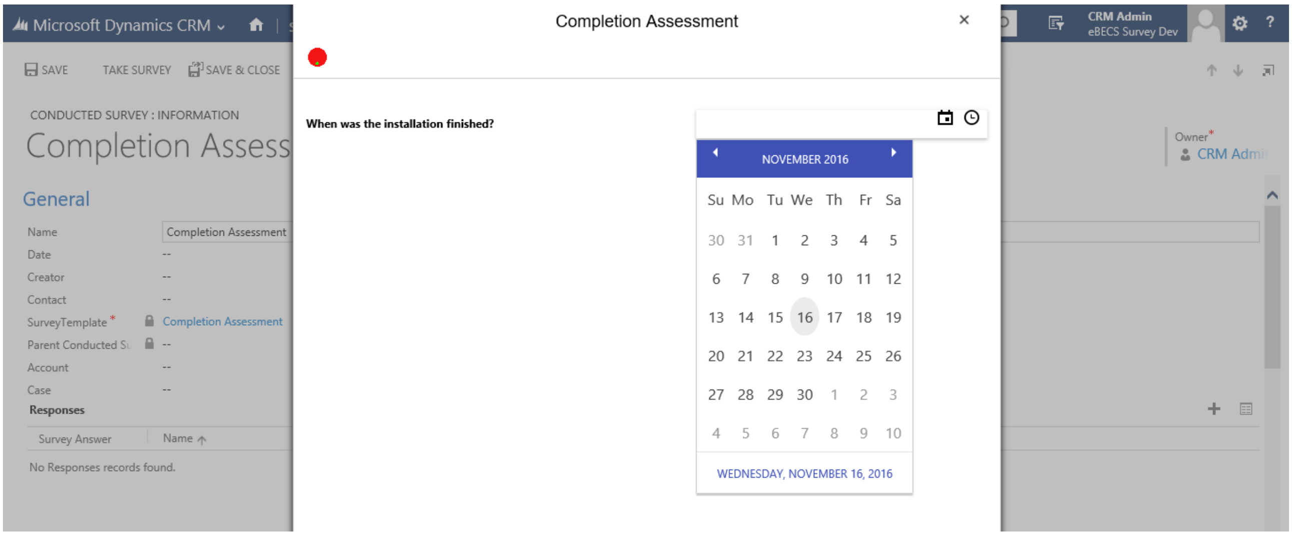


2.1.14 Date/Time

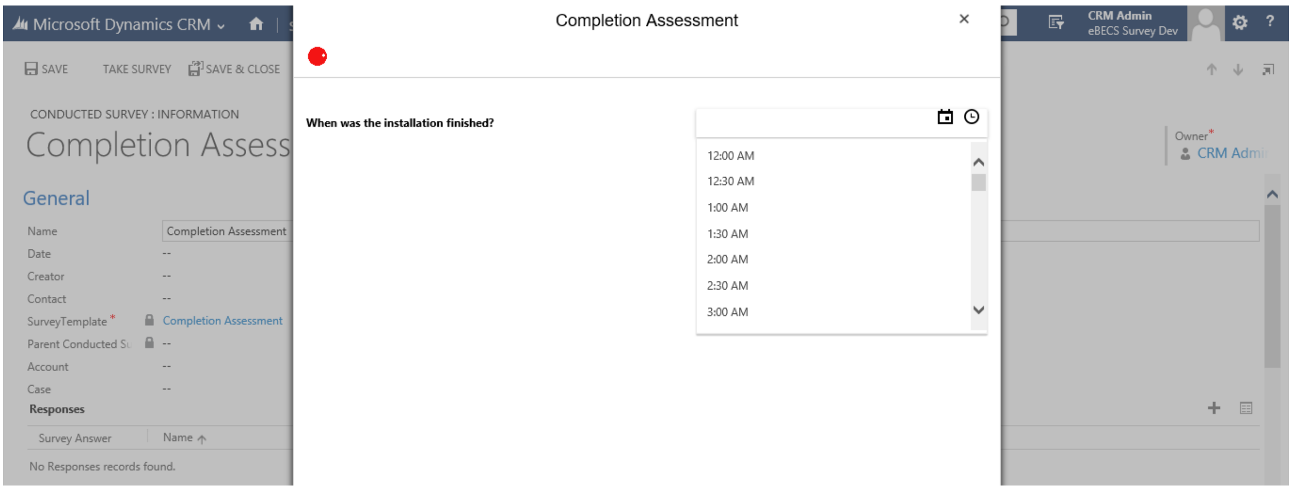
The Date/Time Question Type allows the user to answer the question by entering a date and a time. Both a calendar icon and a clock icon are available and when clicked, the user will be presented with a Date field or a Lookup for the time of day, with every half an hour available to the user. To add this Question Type, you must first create a Survey Question and select 'Date/Time' on the required 'Type*' drop-down list field. The Survey Tab is a required field and the 'Question Order For Section' is also a required field as seen below.

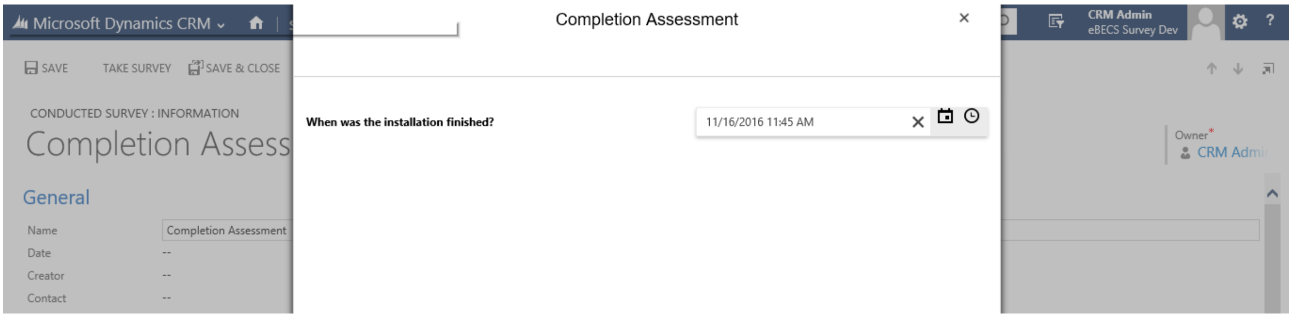


The below screenshot shows this Date/Time Question Type being executed in Dynamics 365. First you can choose the date you wish to enter (*if you choose todays date it will automatically populate the current time*).

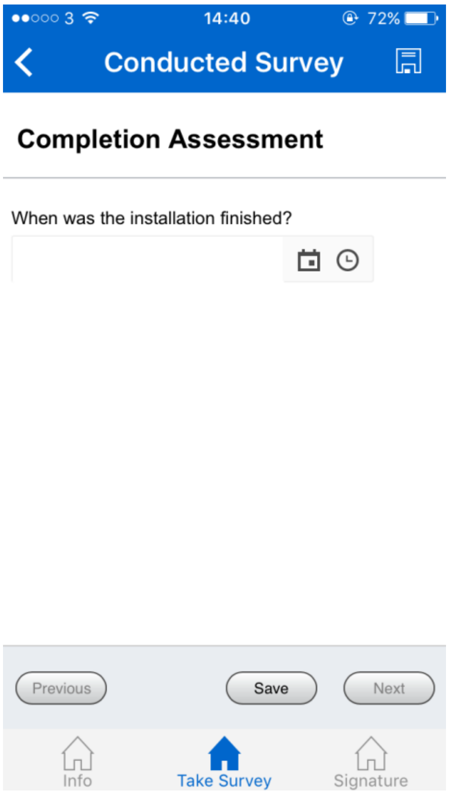


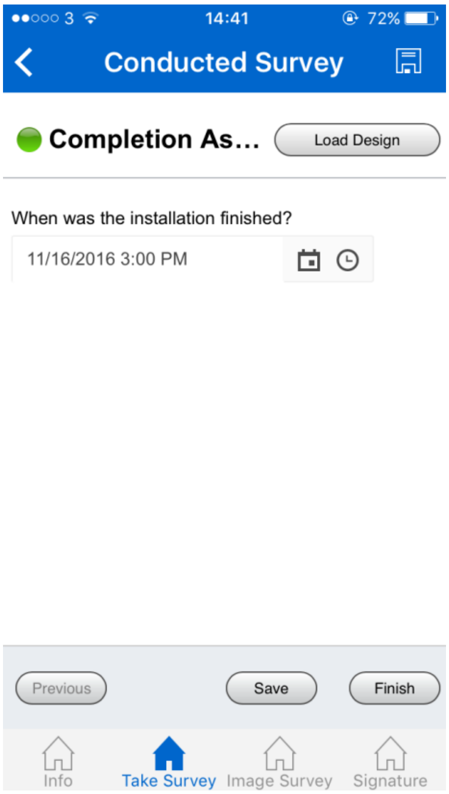
You can then change and enter the time you wish, as seen below.





The functionality is the same in the Resco Mobile Client, again you can choose a date and then a time.

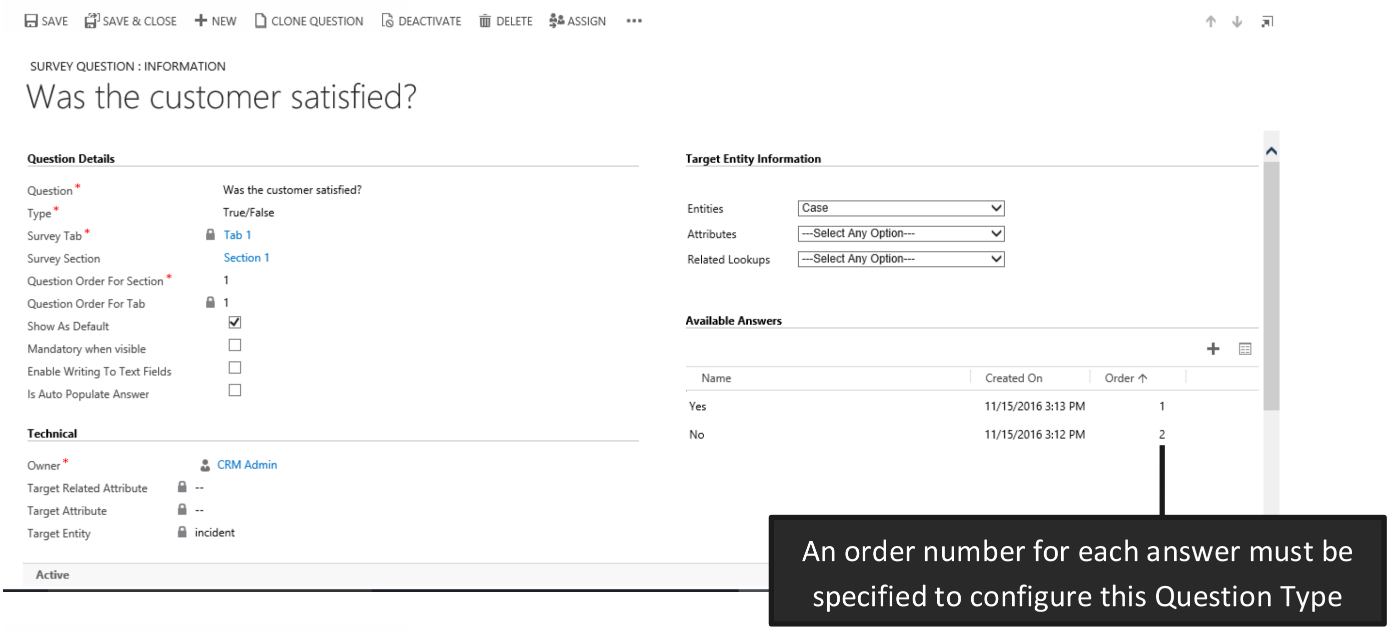


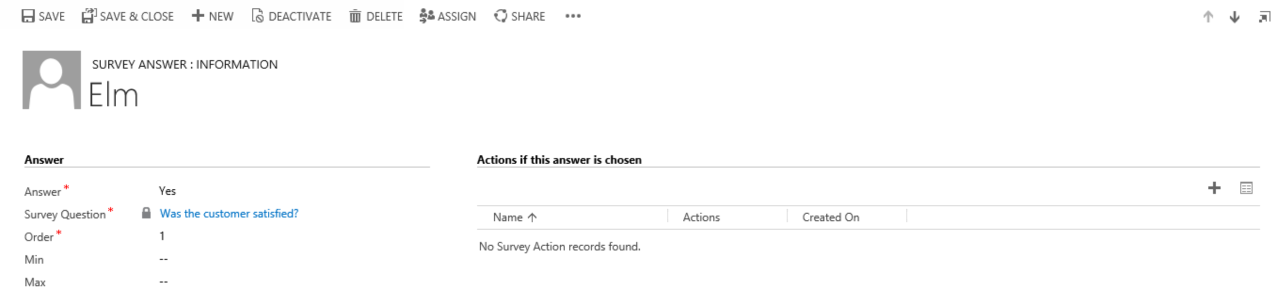


2.1.15 True/False

The True/False Question Type allows the user to select one of two answers. These answers can be changed to what the user wishes, generally these answers will be 'yes'/'no' or 'true'/'false'. To add this Question Type, you must first create a Survey Question and select 'True/False' on the required 'Type*' drop-down list field. The Survey Tab is a required field and the 'Question Order For Section' is also a required field.

An Order number for both answers is required to configure this Question Type correctly.





The example below shows the Question Type executed in Dynamics 365 as the second question, as you can see the user able to select either Yes or No as an answer.

The example below shows the same survey being performed in the Resco Mobile Client, with the second question ‘Is Profile 22 acceptable?’ giving the user an option of either selecting yes or no.

3 Scoring Modul

Scoring is a feature used as a measurement to evaluate weightage for survey answers. It is calculated by;

Weightage x Score Value of Answers

Note:

- **Weight is calculated from Questions. Value can either be integer or decimal**
- **Score Value is calculated from Answers. Value can ONLY be integers**

When you take a survey valuation, based on the answers you select; a total score is delivered. These scores will be displayed at the end of your survey. These score results can be calculated by the following two methods/rules; Tab Score and Survey Score Value

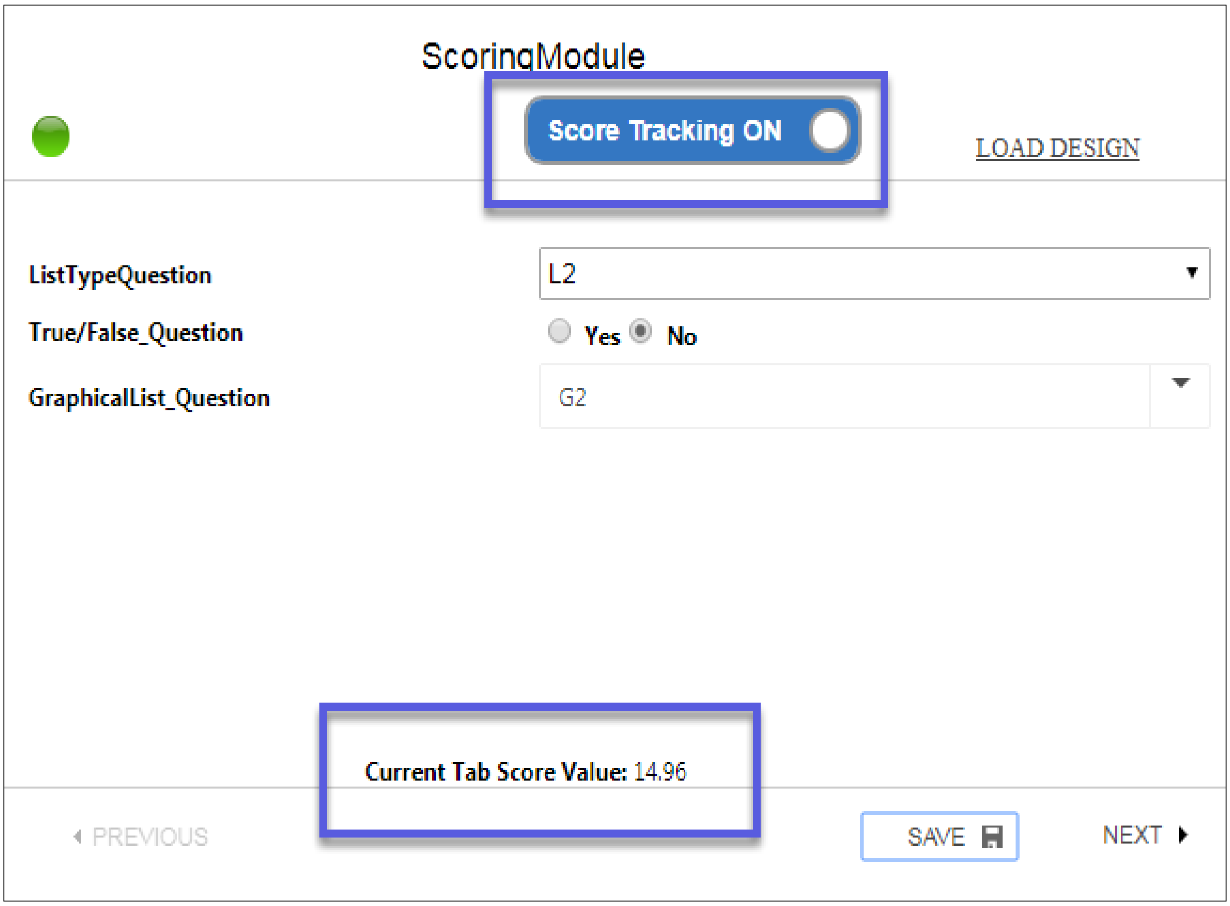
Note: Depending on the tab scores immediately displayed as an answer is selected (scores only visible if Score Tracking is switched ON), you can change the answers for different Tabs (questions)

Note: The following document have screenshots of the Mobile Dynamics 365 too, wherever necessary

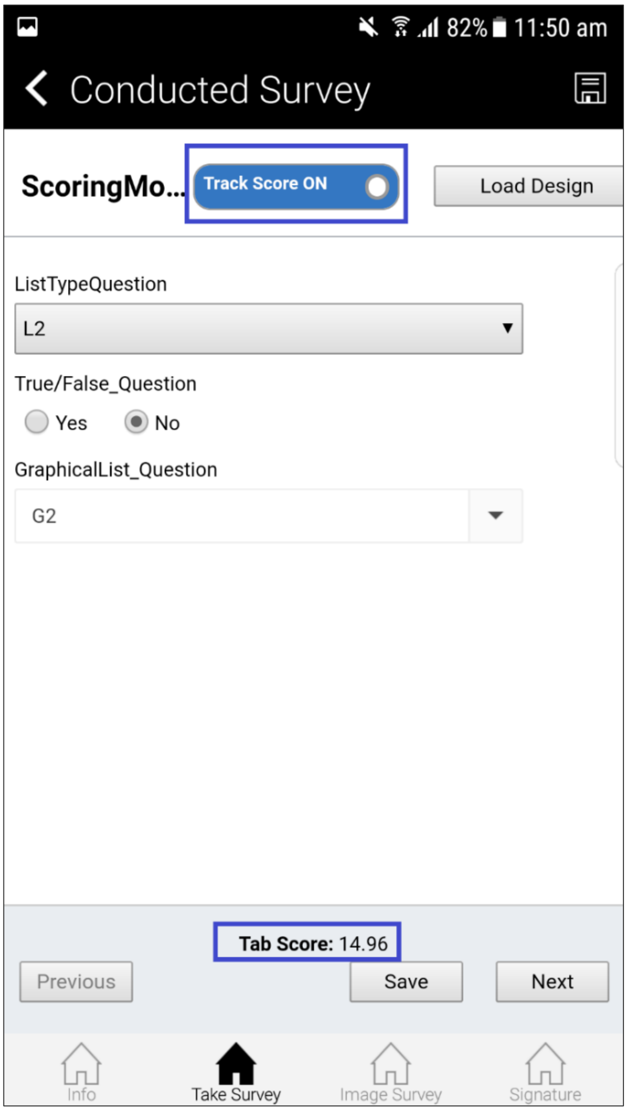
3.1 Tab Score Value

While taking a survey, after completing each section you will be displayed with the Tab Score Value on the bottom on the page. Make sure Score Tracking is switched on to track the score; if switched off score tracking will not show.

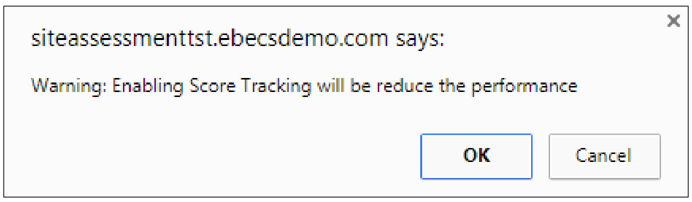
Dynamics 365 View

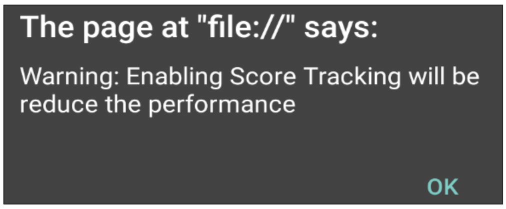


Resco Mobile OR Field Service App



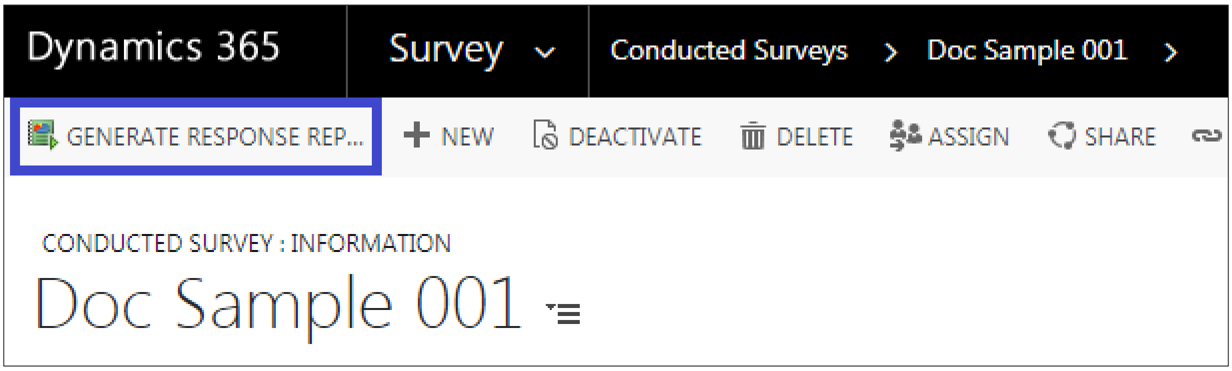
Note: When switching on the Score Tracking, you will receive a popup dialog box as shown below; Click OK to proceed.



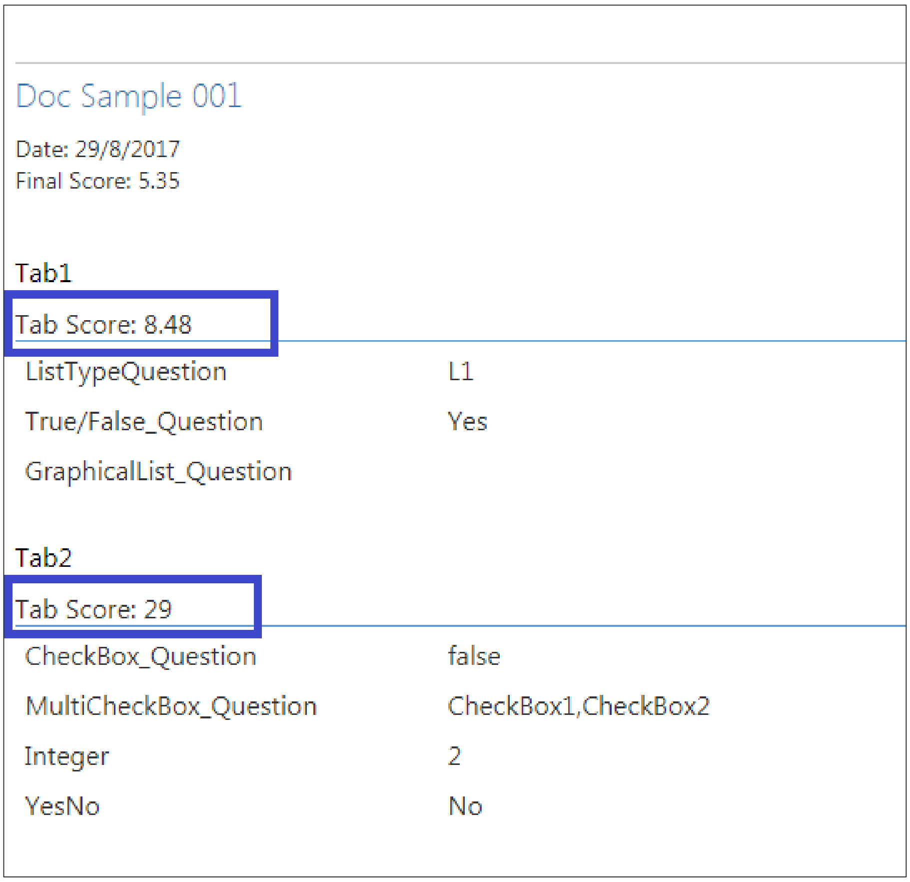


The score keeps adding till you finish taking the survey. After completing the survey to view tab scores, you can:

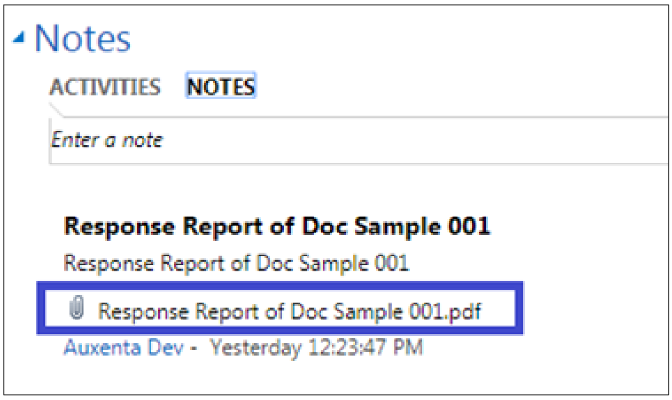
a) Open the conducted survey and click on the GENERATE RESPONSE REPORT ribbon.



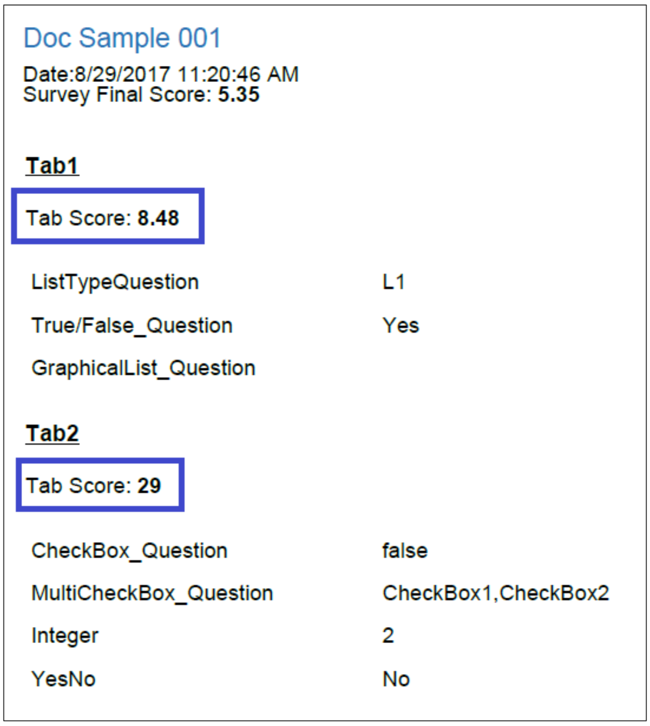
Upon click, a popup window will display, where you can view each tab score; as shown on image below:



b) Open the conducted survey. Here, under the Notes Tab you will find a .pdf attachment available for download.



Click on it. Open the .pdf, to view Tab Scores



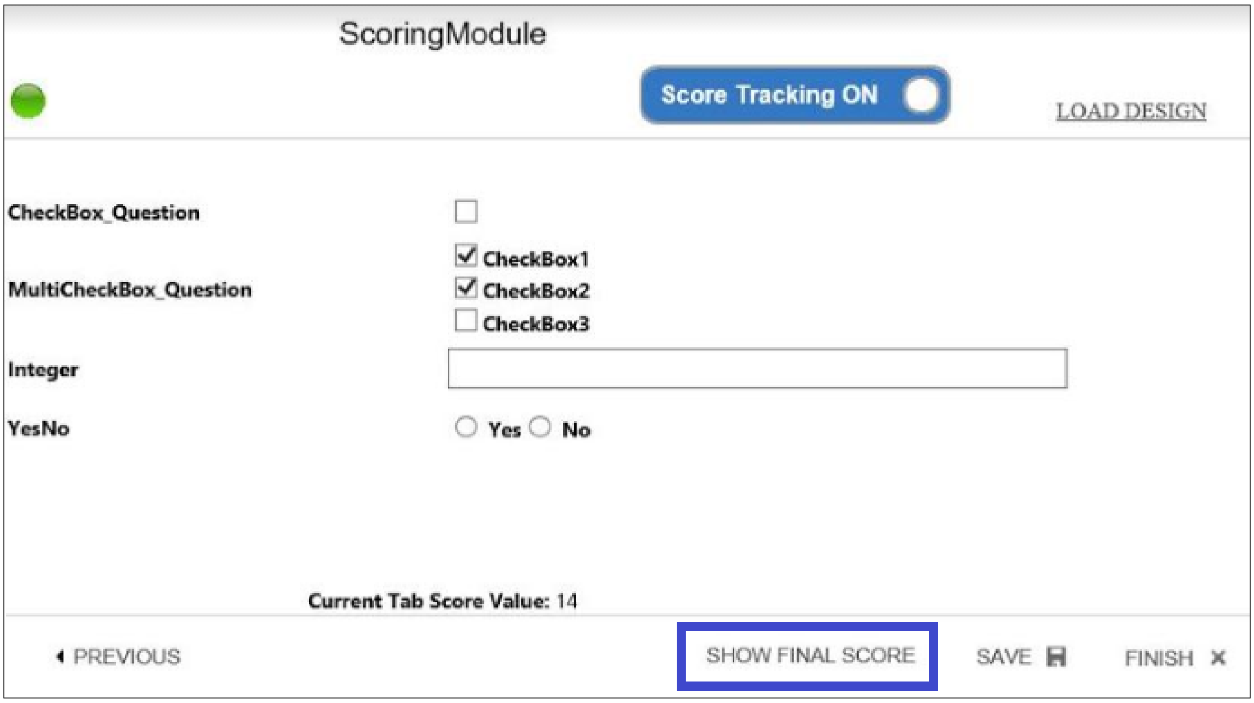
Note: A summary of all chosen answers (responses) are also available here as shown on image below;

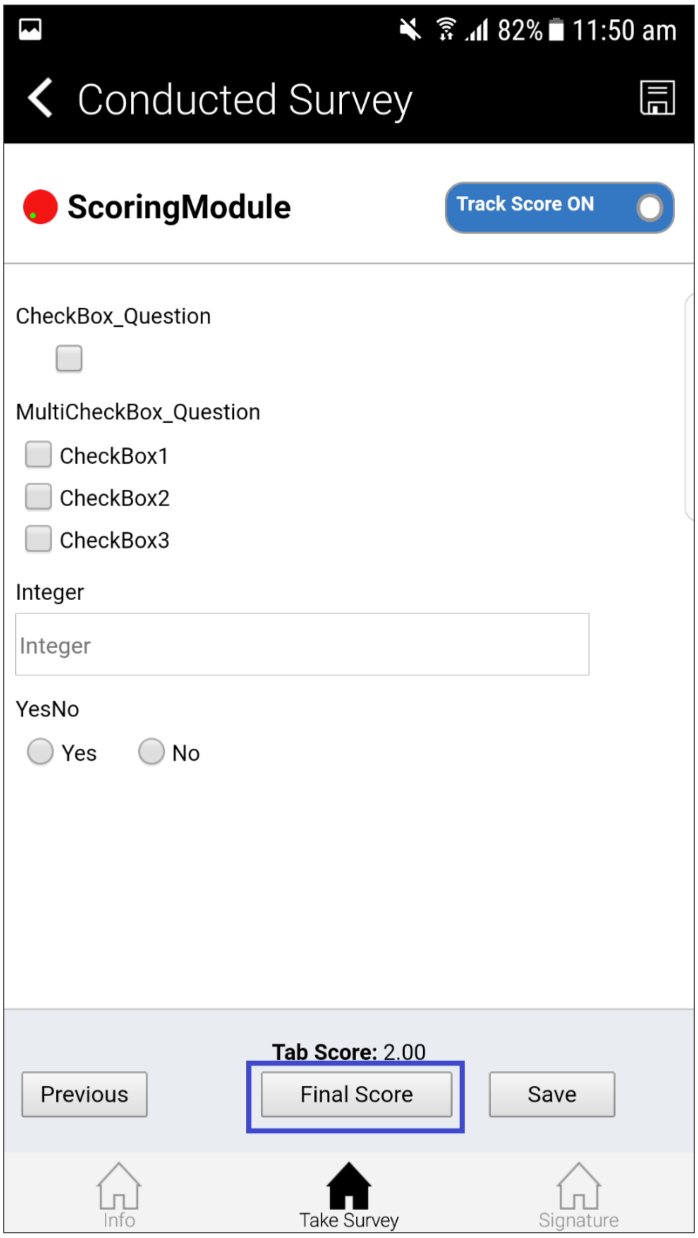
Responses

Survey Answer	Name ↓	Created On	Survey Question
Yes	Yes	8/29/2017 12:22 PM	True/False_Question
No	No	8/29/2017 12:22 PM	YesNo
L1	L1	8/29/2017 12:22 PM	ListTypeQuestion
false	false	8/29/2017 12:22 PM	CheckBox_Question

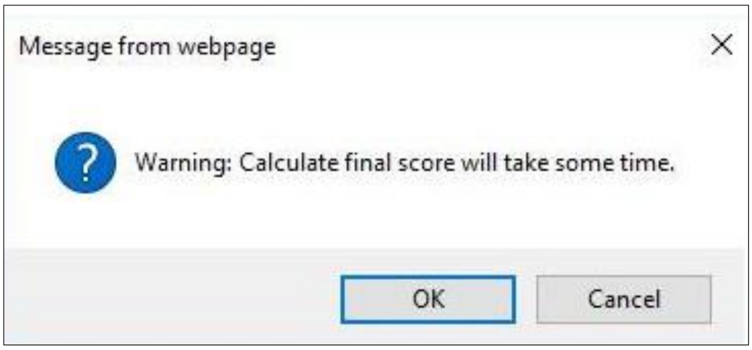
3.2 Survey Score Value

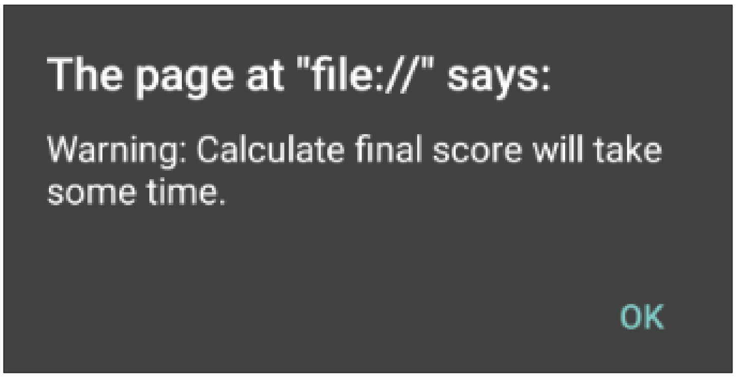
While taking a survey, to view the final score midway; you can click on SHOW FINAL SCORE, available in the bottom of the survey page.



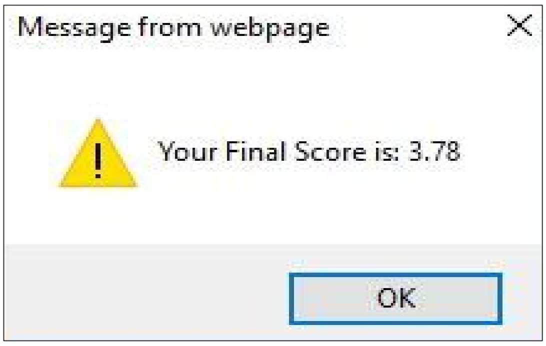


Upon click a dialog box appears, as shown on image below; Click OK





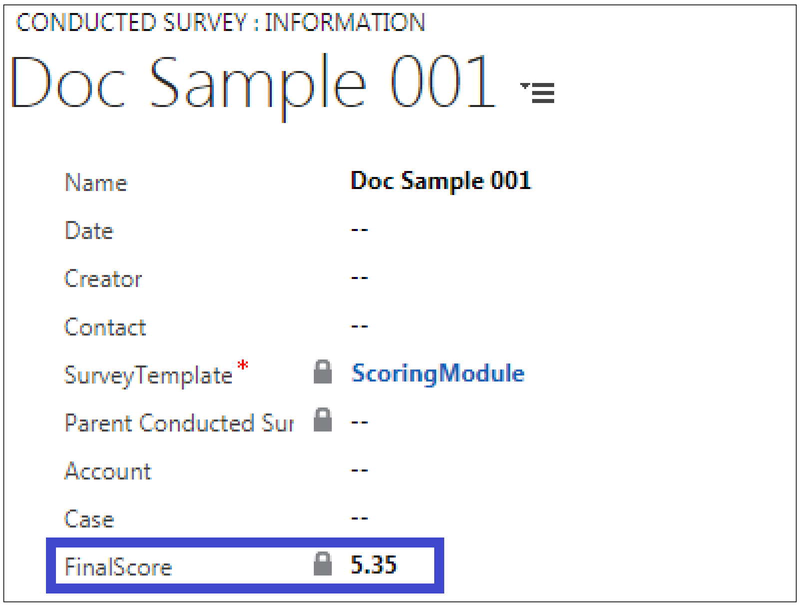
Another dialog box appears showing the current final score of the particular survey.



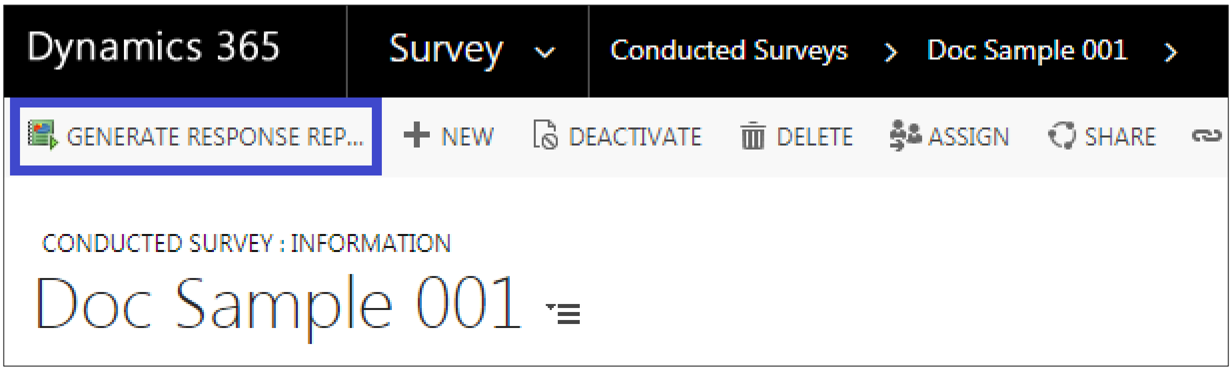
Click OK to dismiss and continue taking your survey.

After completing the survey to view final score, you can:

a) Open the conducted survey. You will find a Final Score Field, where the final score of the particular survey is displayed.



b) Open the conducted survey and click on the GENERATE RESPONSE REPORT ribbon.



Upon click, a popup window will display, where you can view final score; as shown on image below:

Doc Sample 001

Date: 29/8/2017

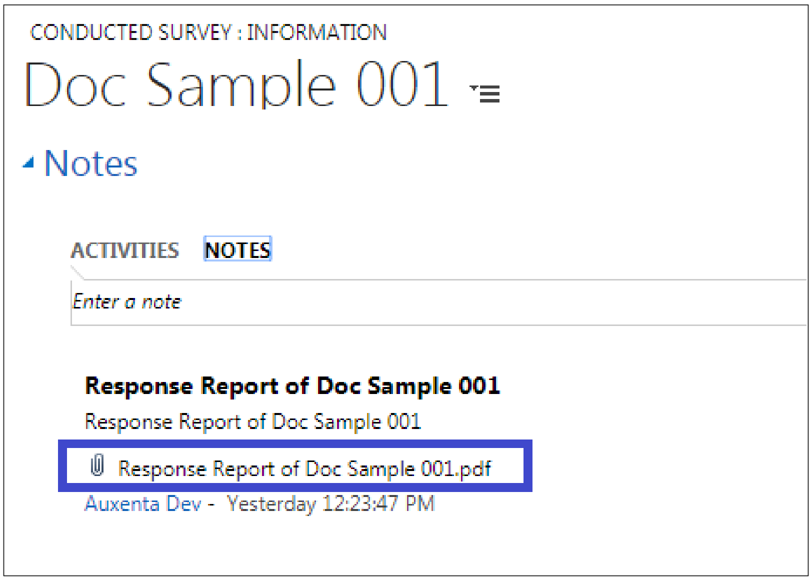
Final Score: 5.35

Tab1

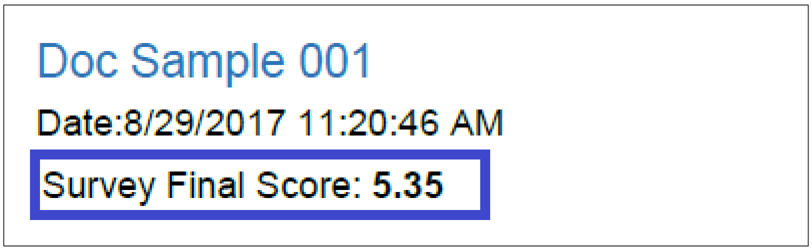
Tab Score: 8.48

ListTypeQuestion	L1
True/False_Question	Yes
GraphicalList_Question	

c) Open the conducted survey. Here, under the Notes Tab you will find a .pdf attachment available for download.

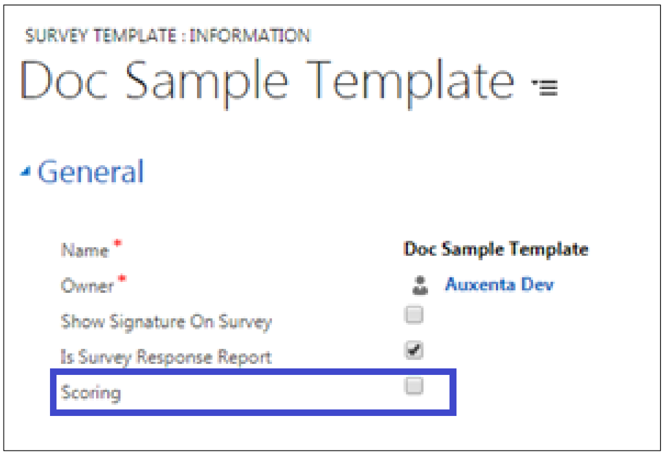


Click on it. Open the .pdf, to view Final Scores

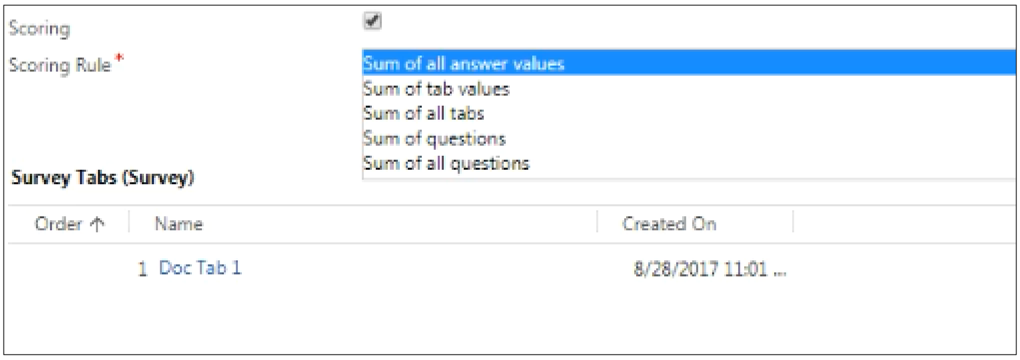


3.3 Scoring Survey Template

When creating a survey template, you will find a field named Scoring. You can either apply scoring or not, to your requirements. If the Scoring Checkbox is ticked, it enables scoring feature for this template.



Upon ticking a new field will appear; Scoring Rule, as shown on image below:

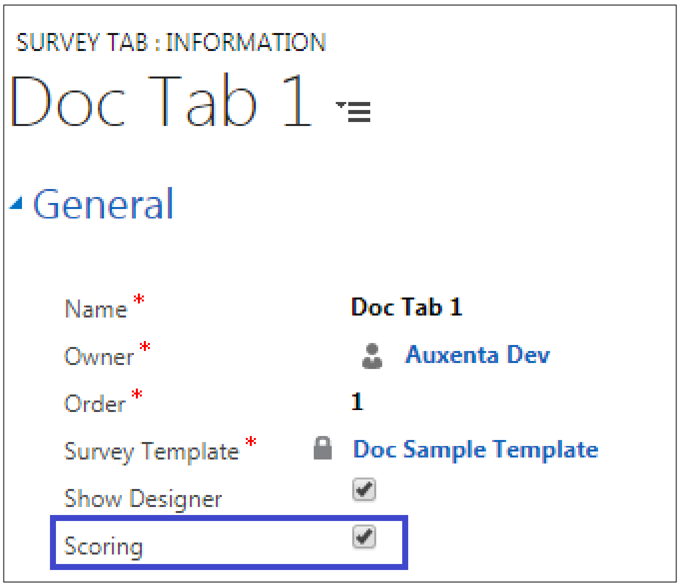


<u>**Scoring Rule:**</u> The rule selected here will apply to this particular survey template.

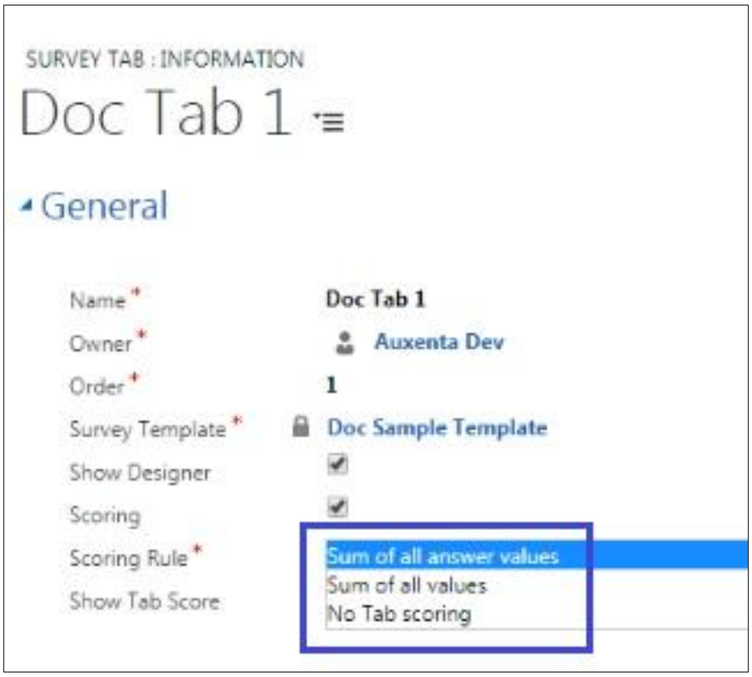
- **Sum of all answers values –** Gives a score summing up all the answers selected while taking this completed survey
- **Sum of tab values –** Gives a score summing up all the answers, dividing them number of tabs, only if scoring is enable.
- **Sum of questions –** Gives a score summing up all the answers, dividing them number of questions, only if scoring is enable.

Scoring Survey Template

When creating a survey tab, you will find a field named Scoring. You can either apply scoring or not, to your requirements. If the Scoring Checkbox is ticked, it enables scoring feature for this tab.



Upon ticking, two new fields will appear; Scoring Rule and Show Tab Score, as shown on image below:

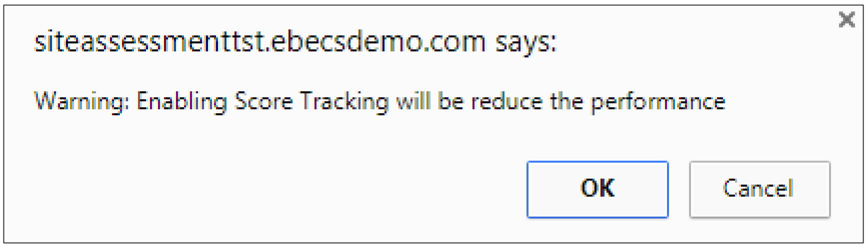


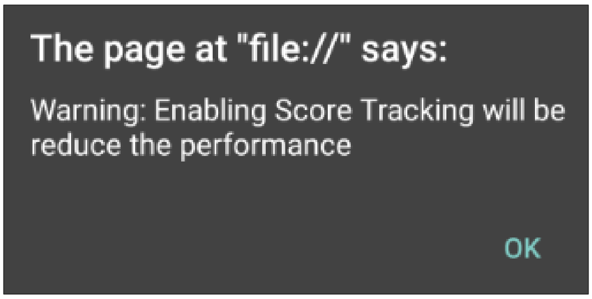
Scoring Rule: The rule selected here will apply to this particular survey tab.

- **Sum of all answers values –** Gives a score summing up all the answers selected
- **Sum of all values –** Gives a score summing up all the questions, dividing them number of questions, only if scoring is enabled in the specific tab.
- **No tab scoring –** No score will be calculated

Show Tab Score: When taking a survey, you can either turn on or off the scoring feature as required. By default, while taking a survey Scoring is switched off.

Click, to turn on scoring. Upon click you will get a popup dialog box as shown below:





Click **OK**. Now Score Tracking is enabled.

This field defines if you want the current tab score value in your survey or not.

3.3.1 Question Entity

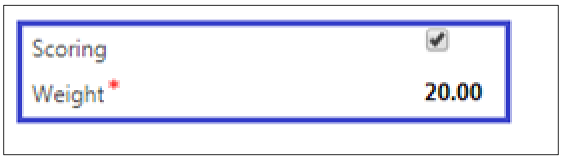
This entity allows you to create your own question/s and tailor them to meet your requirements. There are various Question Types that are available for the tool and these will be defined in further detail in the below sections.

Question Type allows the user to set the functionality behind the questions within the survey. Allowing it to choose a format in which the question can be answered. The following are the types that support scoring:

- Checkbox
- Multiple Checkbox
- List
- Graphical List
- Integer
- True / False

Note: If you select any other question type apart from the above mentioned and scoring is selected too; Scoring WILL NOT apply. Scoring will be revoked.

When creating a question, ticking the scoring field checkbox, enables scoring feature for the particular question and another field, Weight appears. Here you enter the integer value on how much this question weighs.

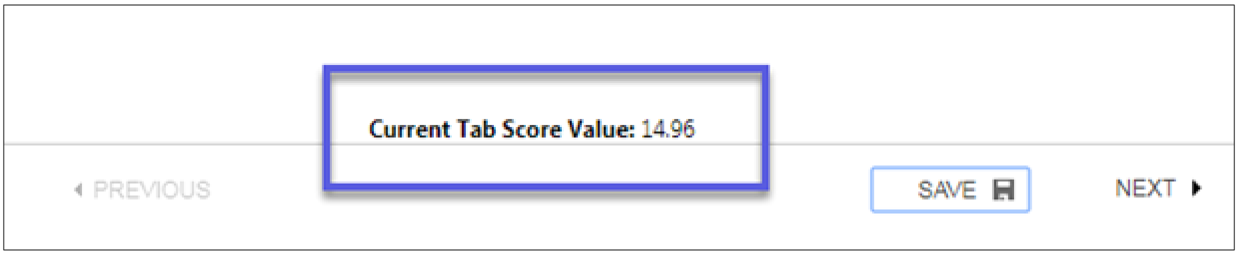


Scoring	Enables/disables scoring feature for the particular question
Weight	Enter a value that defines the weightage of your question (for scoring calculation)

Note: Weight value cannot be in MINUS value

3.3.2 Capture Score

Capture Score Entity allows/enables you view Current Tab Score while taking a survey.



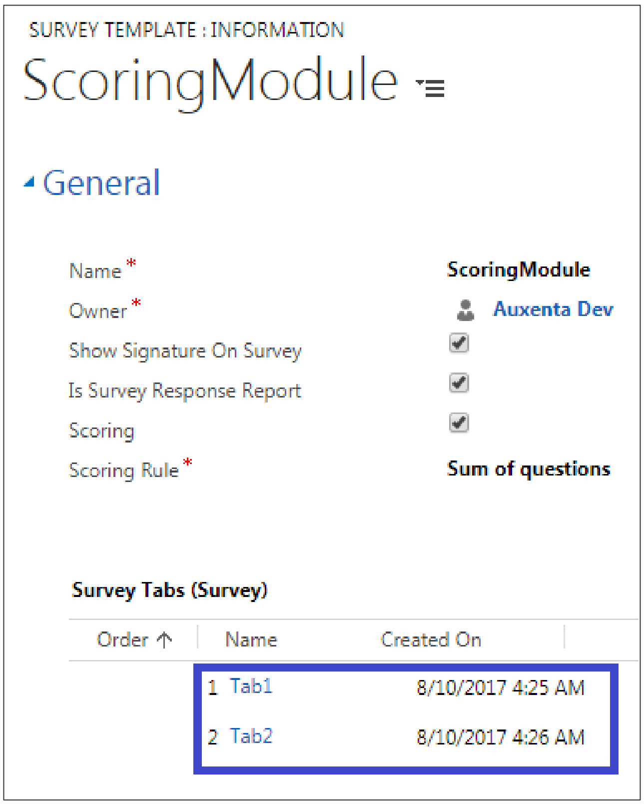
Each Tab needs to have a capture score question. Only if it has one, the current tab score will be saved for the particular tab, while taking the survey.

3.3.3 Configuration

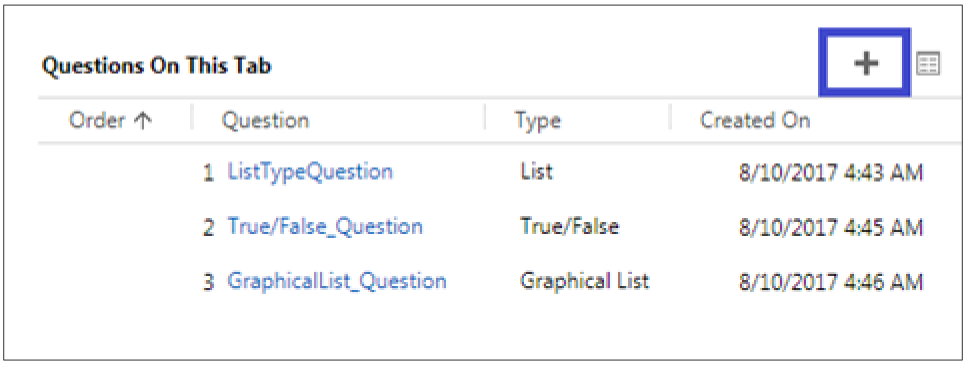
To configure capture score by adding a question, follow the steps below:

Open/ create a survey template, with tab, questions and answers configured.

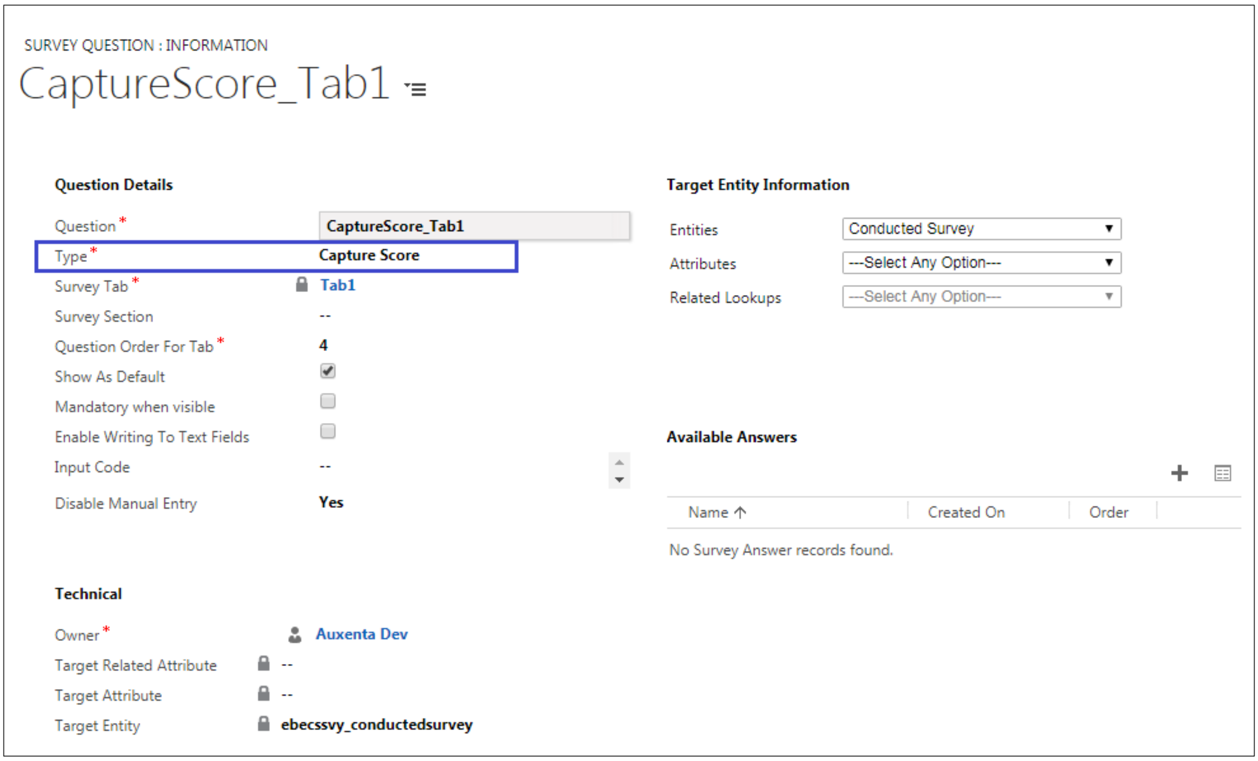
Open a Tab



Click on "+" to create a new question under the selected tab.



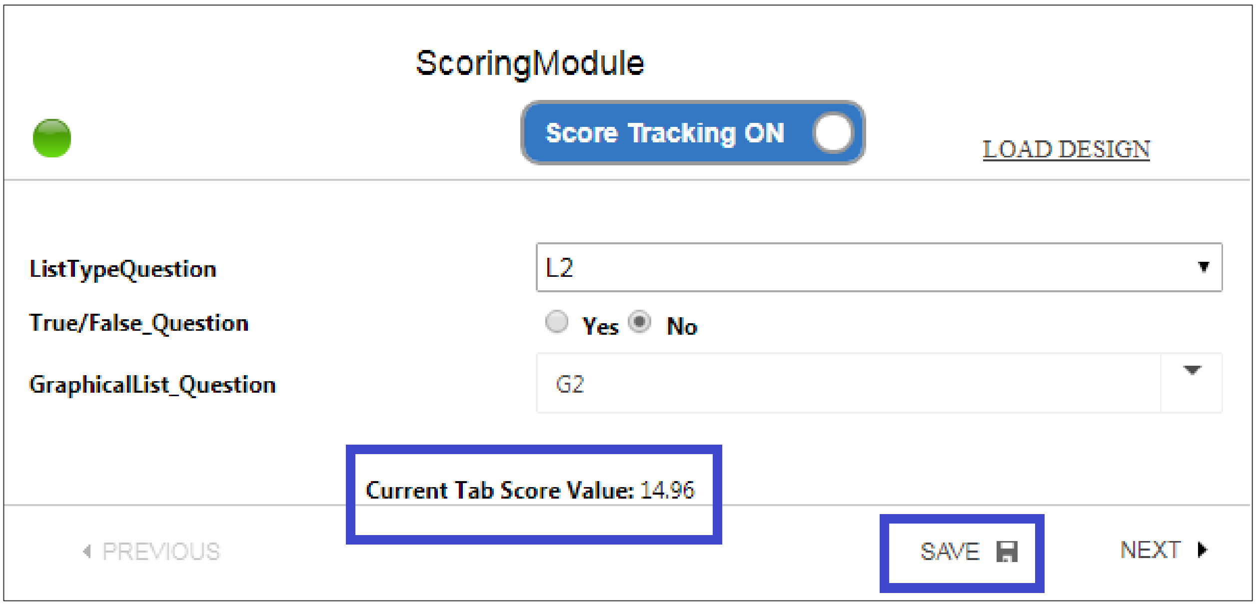
Select the Type as Capture Score and fill the remains fields as required. Answers need not to be configured for a Capture Score question



Click SAVE&CLOSE. You have now configured/created/enabled a Capture Score.

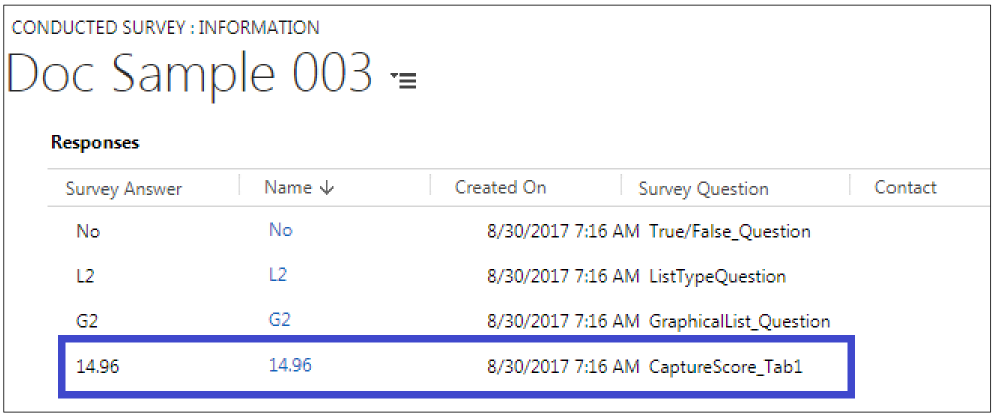
3.4 How it works

When you are taking a survey, complete a tab and click save to view current tab score.



To see the current responses and scores; Open the current conducted survey in the Dynamics 365 (the survey you are taking). Navigate to Responses, here, you will find the recordings of the current responses you made on the specific survey.

As shown on image below, you can view the current tab score.

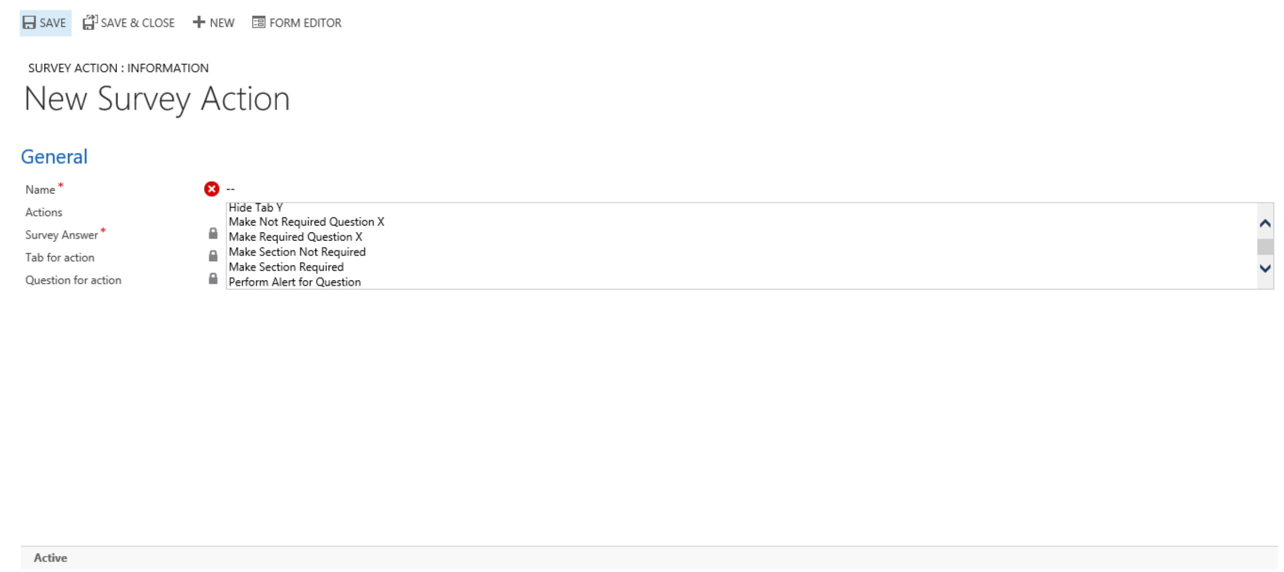


Note: If you make changes to in the survey and save it; you can refresh the specific conducted survey window to update changes/responses made.

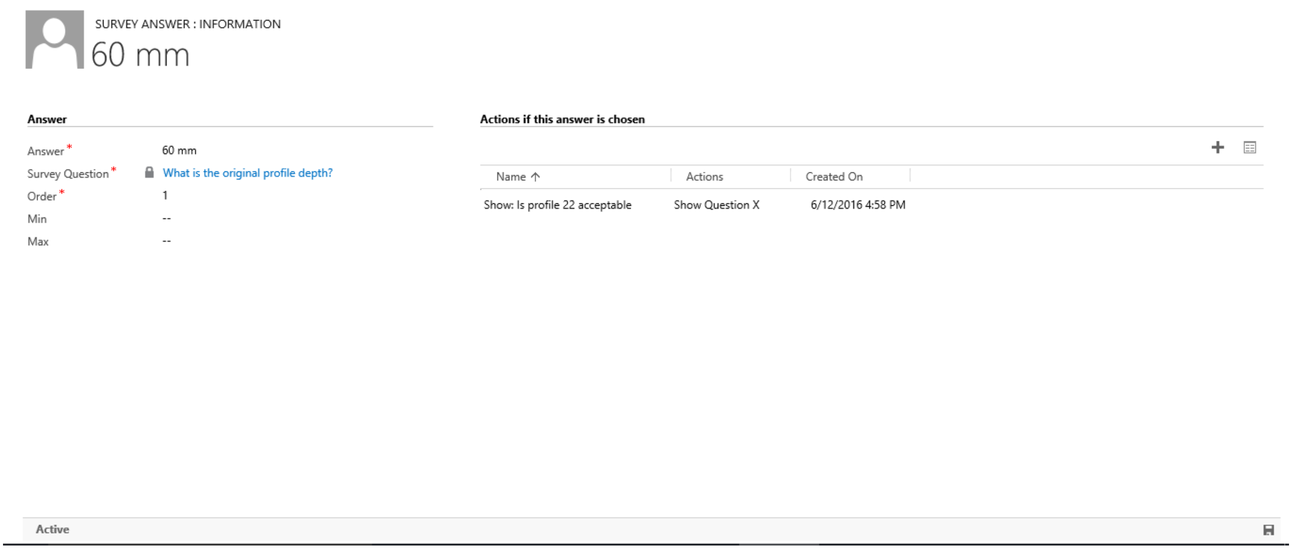
4 Action Entity

The Action entity within the Survey Tool allows users to dynamically configure the Survey in real-time. This is done through the selection of previous answers that trigger powerful actions. For instance, it can be triggered so that if the user selects Yes on a true/false Question Type, the Survey will trigger a specific question relevant to the Yes answer selected and if No happened to be selected, a different question can be triggered specific to the No selection.

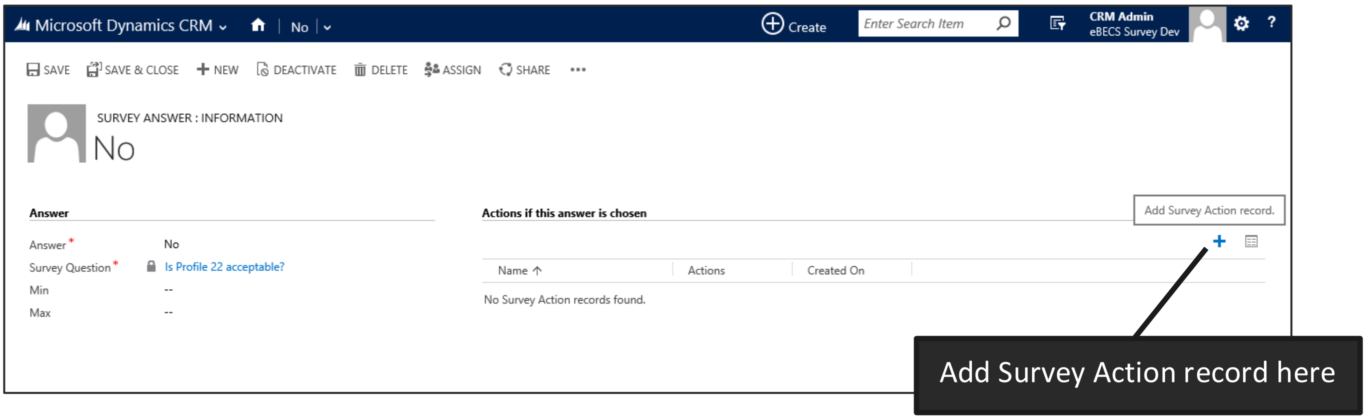
The below screenshot shows an example of where a new Action is created. By selecting which Action to use, the appropriate fields that are required for this Action to trigger become available.



The Action form can be navigated to by navigating to a ‘Survey Question’, clicking on an answer and an Action view is available on the ‘Survey Answer’ form. Here both the existing Actions can be viewed and new Actions can be created as shown below for each answer. *Note that the Survey Answer must be saved to add an Action.*



By clicking the + sign the Survey Action form will be opened.



3.1 Action Types

There are various Action types that can be used to the User's benefit. The below sub-sections outline the different action types available within the Survey Tool and their functionality. Again, any examples used throughout this guide will use the scenario of a field based Window and Door technician and how Actions can be configured in a basic Survey they would use.

4.1.1 Apply Custom Filter

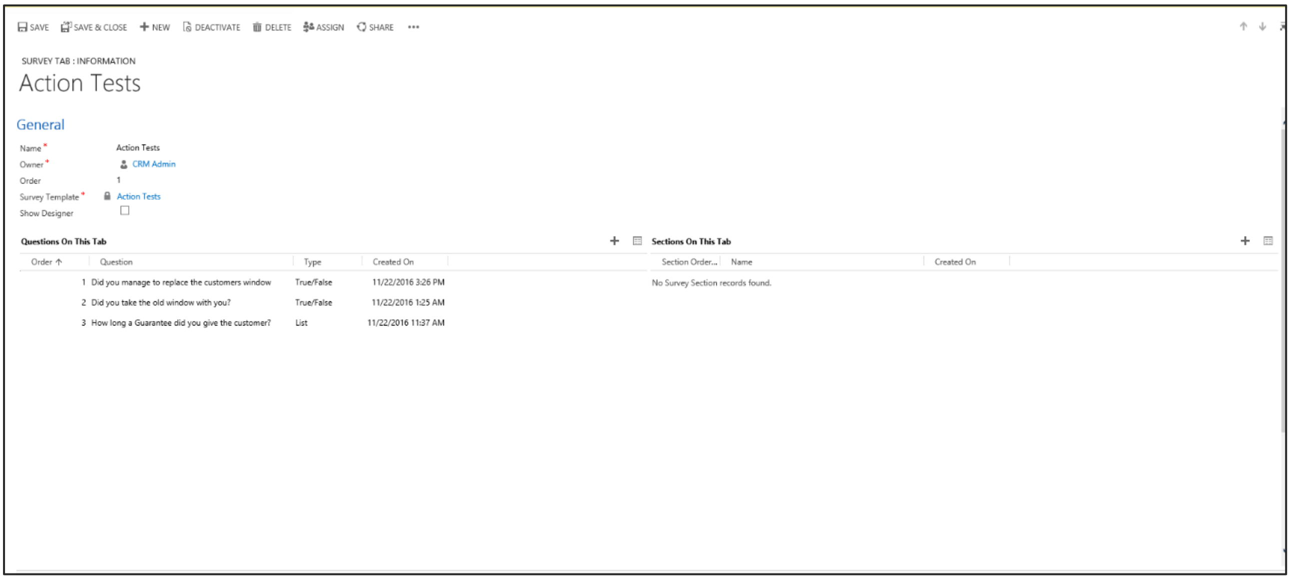
This action allows a user to set a specific filter to a Lookup field depending on the answer given to the question that precedes it. To configure this, you must create the Action on the Survey Answer you wish to trigger the Action.

An example of this might be where the technician needs to answer a question relating who they billed when they were onsite, was it billed to the customer or the account? In this example the question would be "who did you bill for the work you performed?" if the technician selects Account then the action would filter to accounts for the technician to choose and vice versa for contacts.

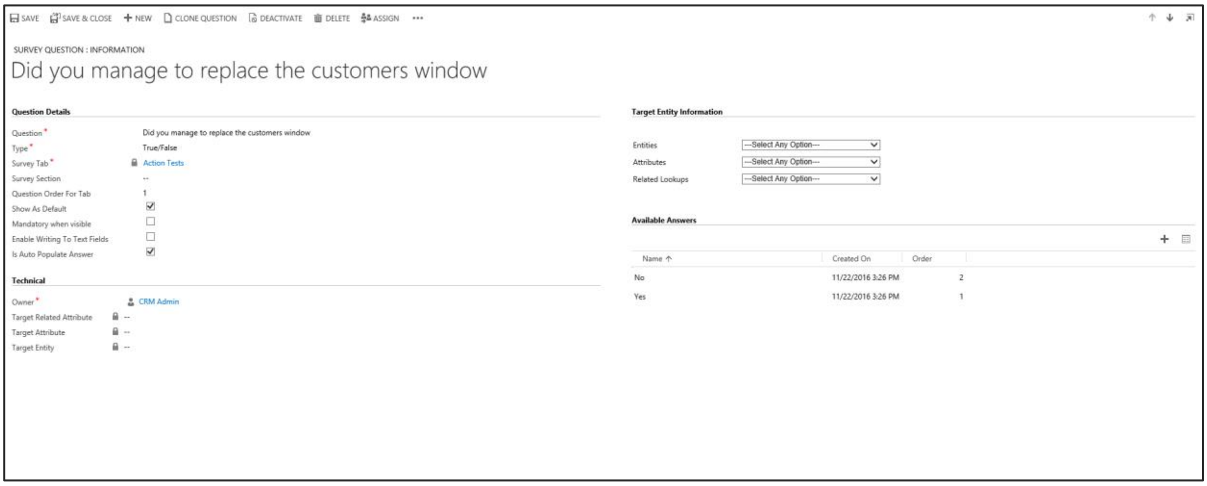
4.1.2 Clear and Hide Question

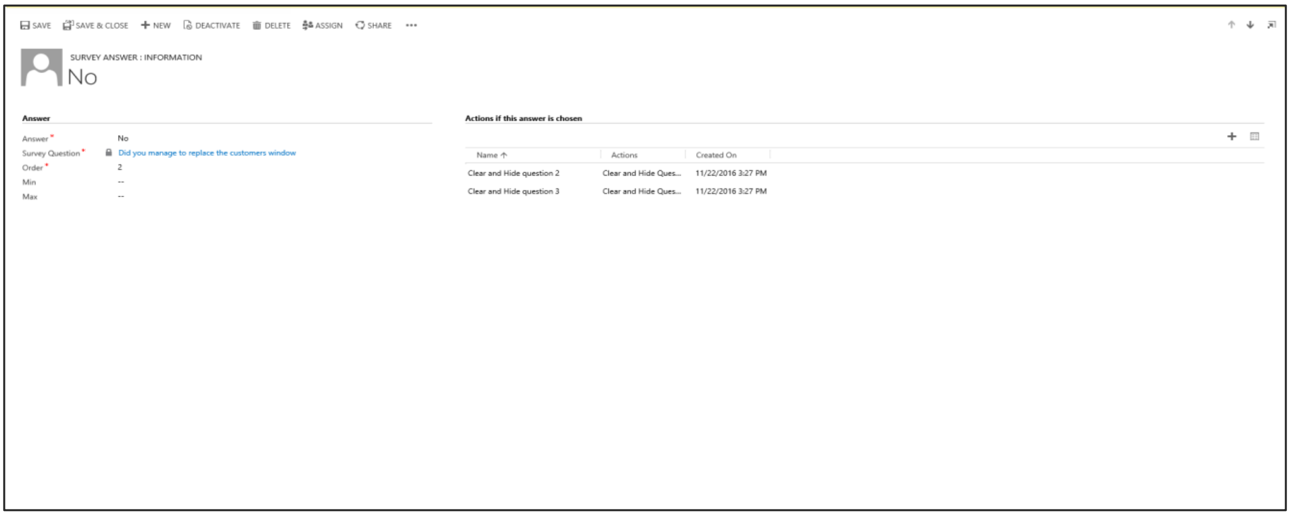
This action allows the survey creator to hide a set of questions within a survey when an answer is given. To configure this, you must create the Action on the Survey Answer you wish to trigger the Action.

An example of this might be that a technician went to a customer site and the customer wasn't there, so the first question would be "Did you manage to replace the customers window" and if the answer given is "no" then you would clear and hide all the following questions as they would no longer be relevant. This is a powerful action as it allows the user to tailor every survey dependent upon the answers that are given to the questions that are specified within the survey itself. To set up this action it is first essential to have a survey set up with more than one question as seen below.

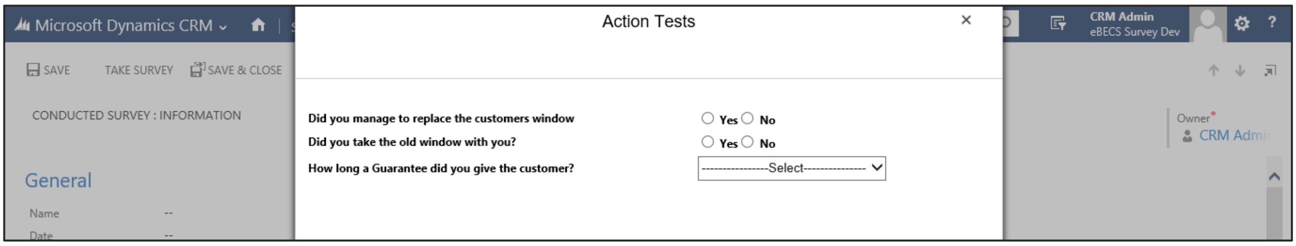


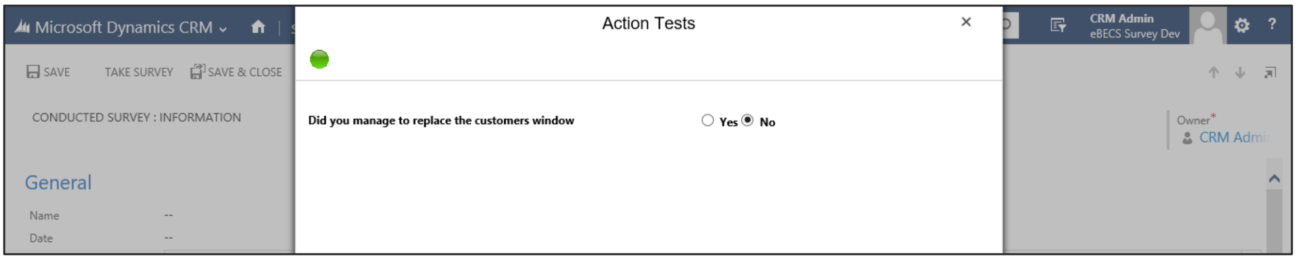
Once this is done, select a question to put the action against. In this example the question that we will put the clear and hide question against is the "did you manage to replace the customers window". In this example if the technician answers "no" to the first question then the other two questions will be hidden and the survey will be completed.



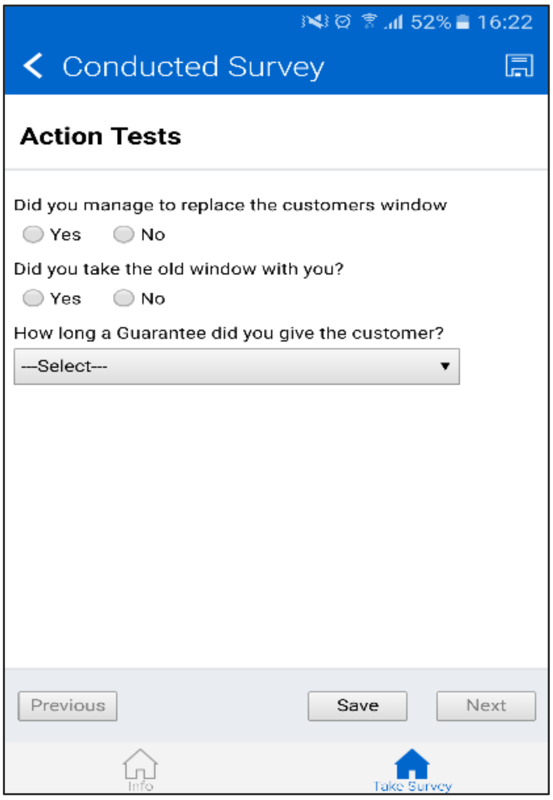


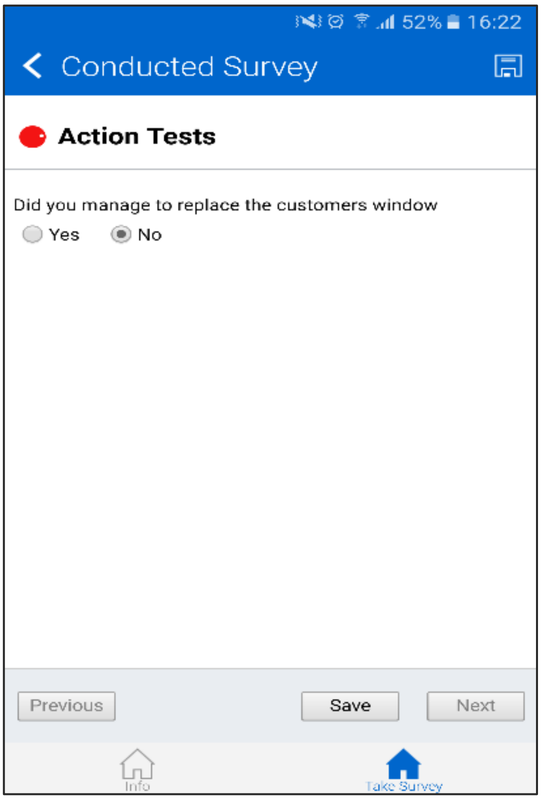
When this Action type is executed within a Survey in Dynamics 365, it will look like the below.





When carried out in the Resco Mobile Client, the same Action is triggered as shown below.



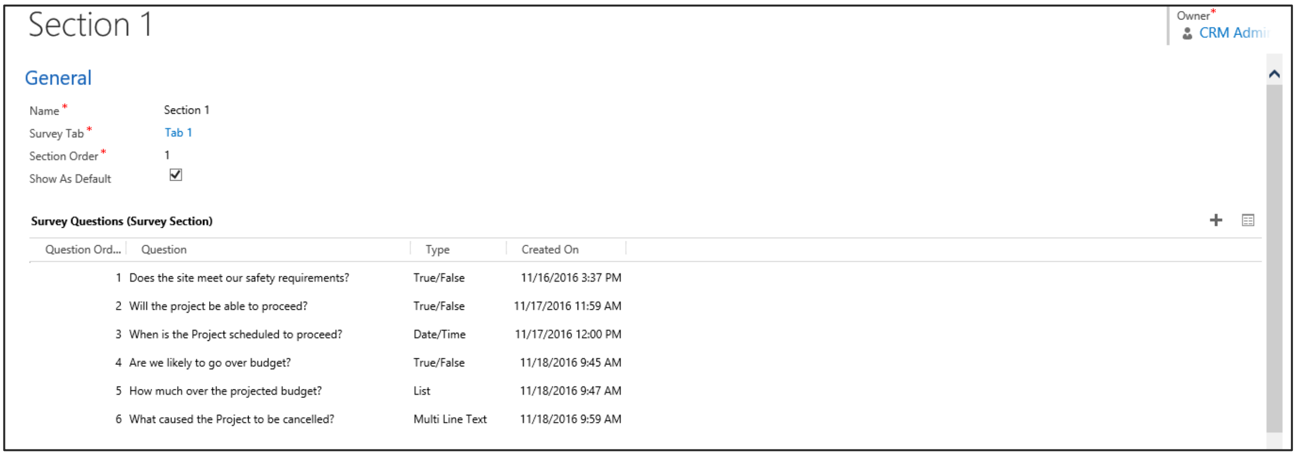


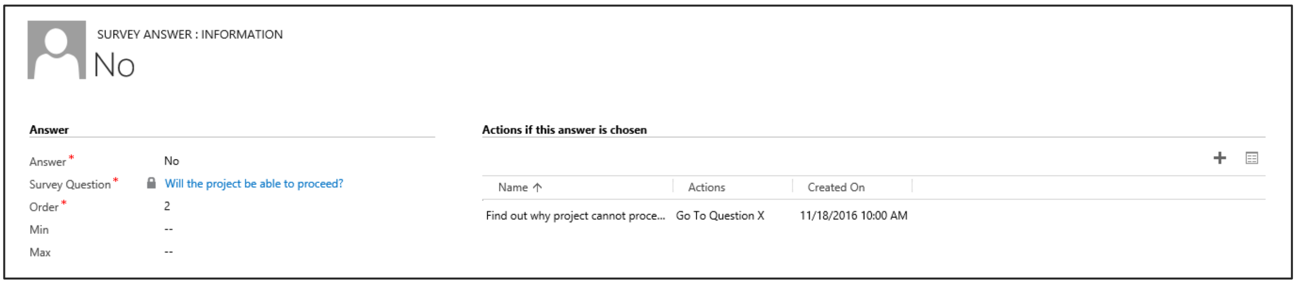
4.1.3 Custom Script

4.1.4 Go to Question X

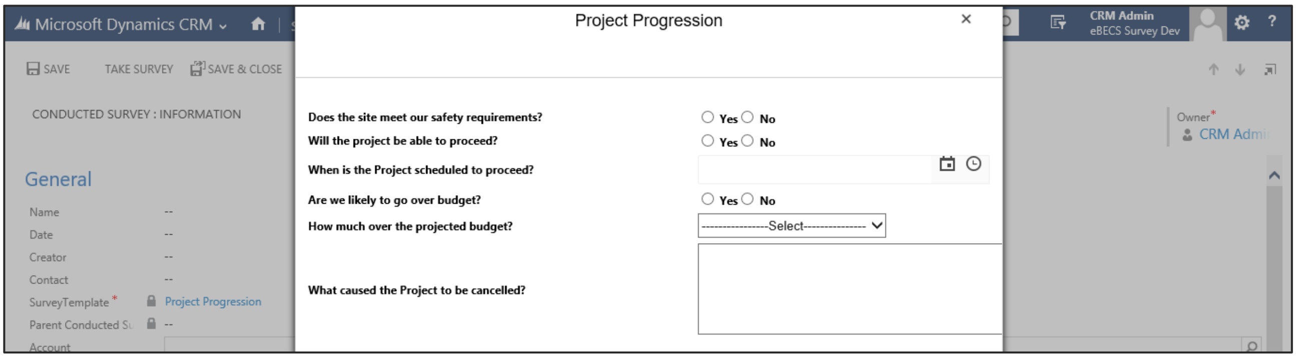
The ‘Go to Question X’ Action type triggers the user to answer a specific question when a specific Survey Answer is selected. This configures the Action to direct the user through the Survey answering specific questions tailored to the answers they have selected. For instance, in the below scenario, when the technician selects that the Project will not be able to proceed, they are then directed to Question X to analyse what went wrong with this Project.

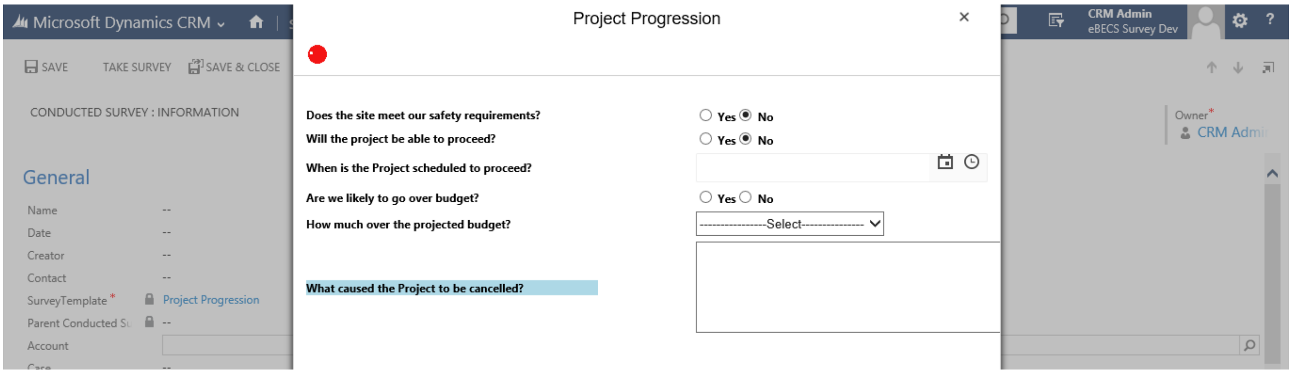
To configure this, you must create the Action on the Survey Answer you wish to trigger the Action. The ‘Question For Action’ field is mandatory and provides a Lookup to Questions on that Section, the Survey Question selected is the essentially ‘Question X’ which you will be directed to.



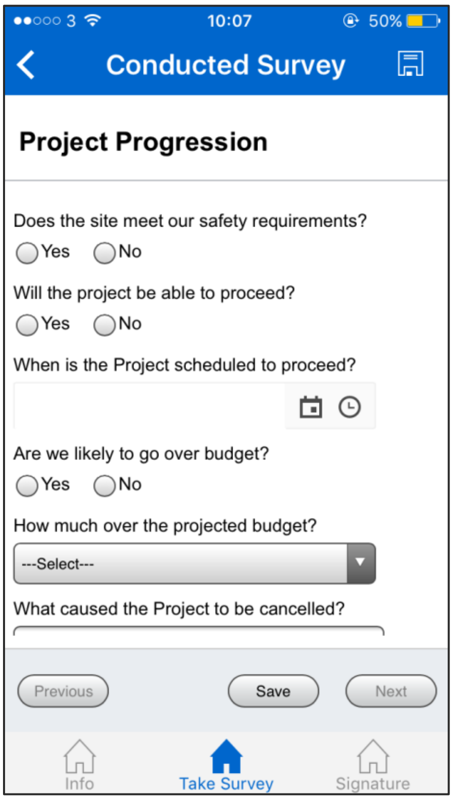


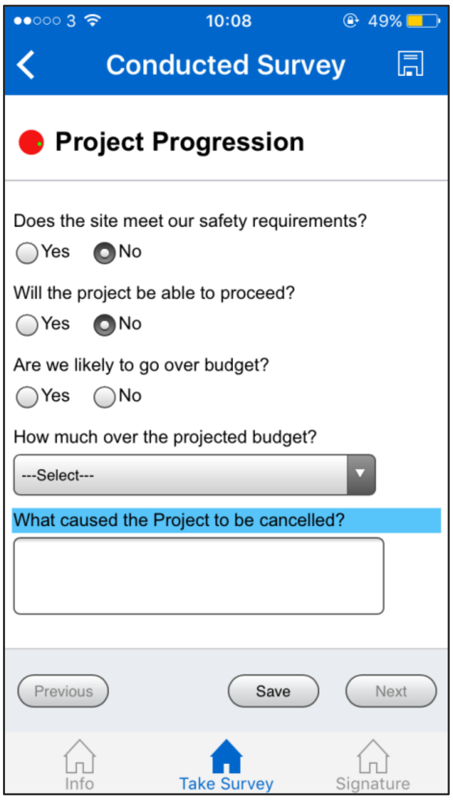
When this Action is executed in a Survey within CRM, it results in the following.





When executed in the Field Service App & Resco Mobile Client, the same functionality occurs.



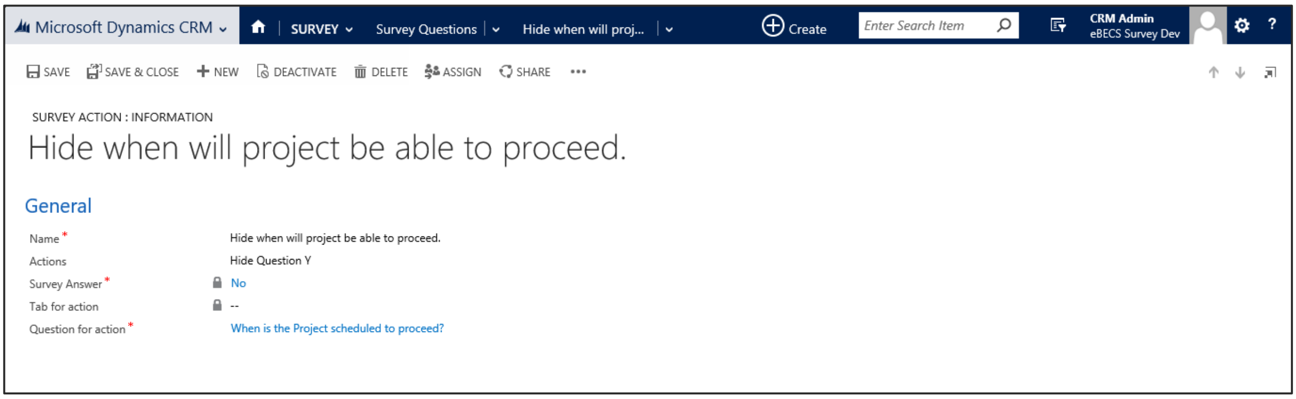


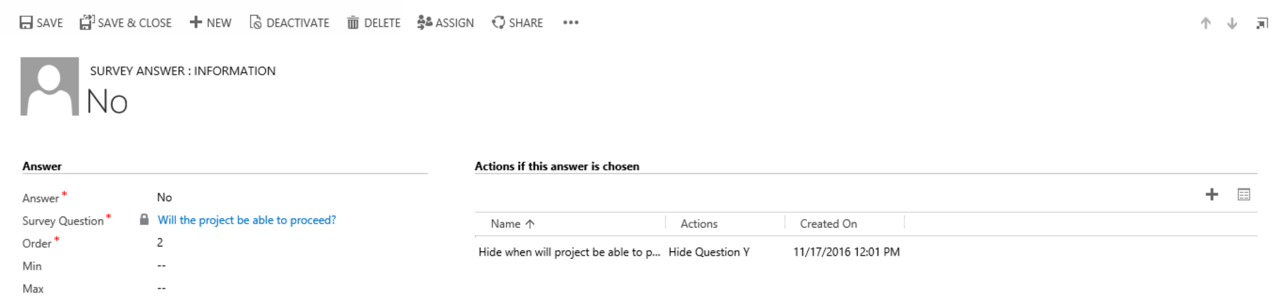
4.1.5 Hide Question Y

The 'Hide Question Y' Action triggers a question to become hidden from the Survey when a specific answer is chosen on a previous question. This configuration can be powerful when tailoring a Survey for a user where future questions will become irrelevant based on their previous answers. This example uses the scenario of whether a project will be able to continue and when it is deemed it cannot, the last question asking when the project will resume becomes an irrelevant one and is hidden.

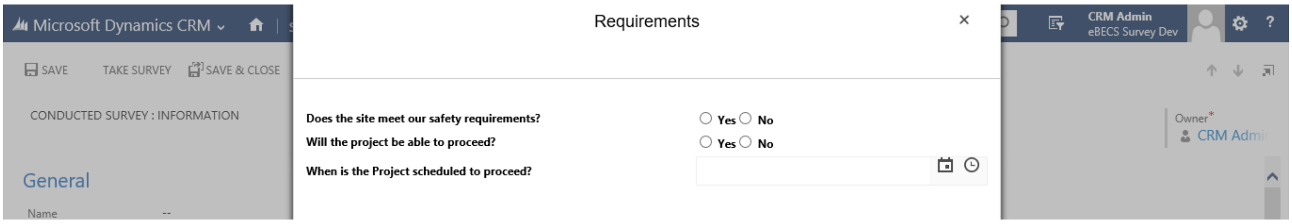
To configure this, you must create the Action on the Survey Answer you wish to trigger the Action. Alike to the 'Go to Question X' Action, the Question For Action' field is mandatory and provides a

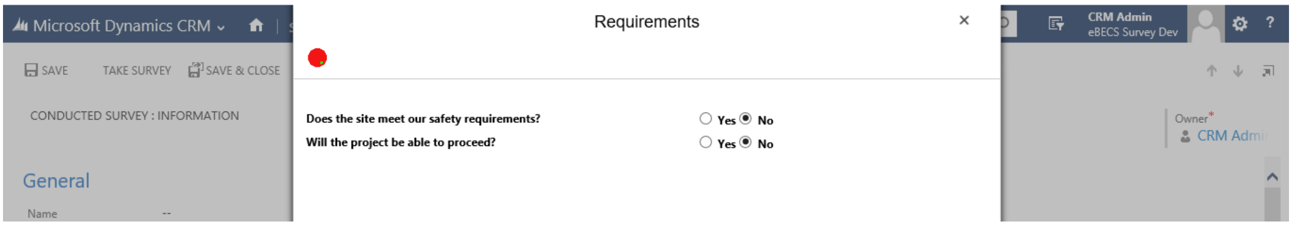
Lookup to Questions on that Section, the Survey Question selected is the essentially ‘Question Y’ which will be hidden.



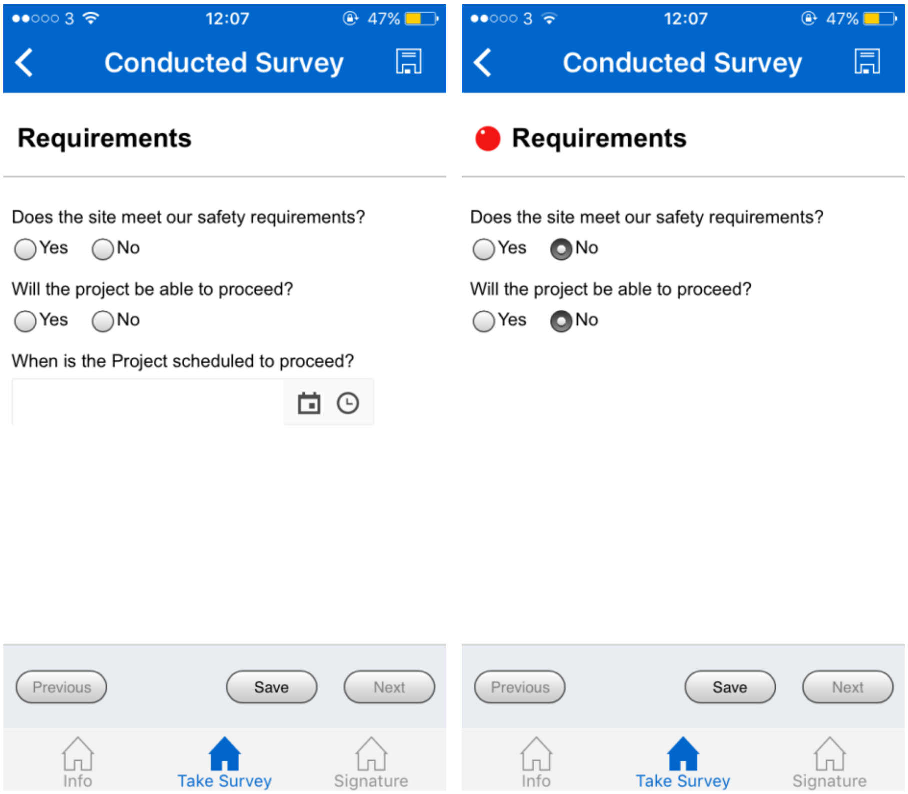


The below screen shot depicts this Action in a real-time Survey in Dynamics 365. Initially all three questions are available on the survey, but when No is selected on the second question regarding the Project proceeding, the third question becomes hidden automatically due to the configuration.



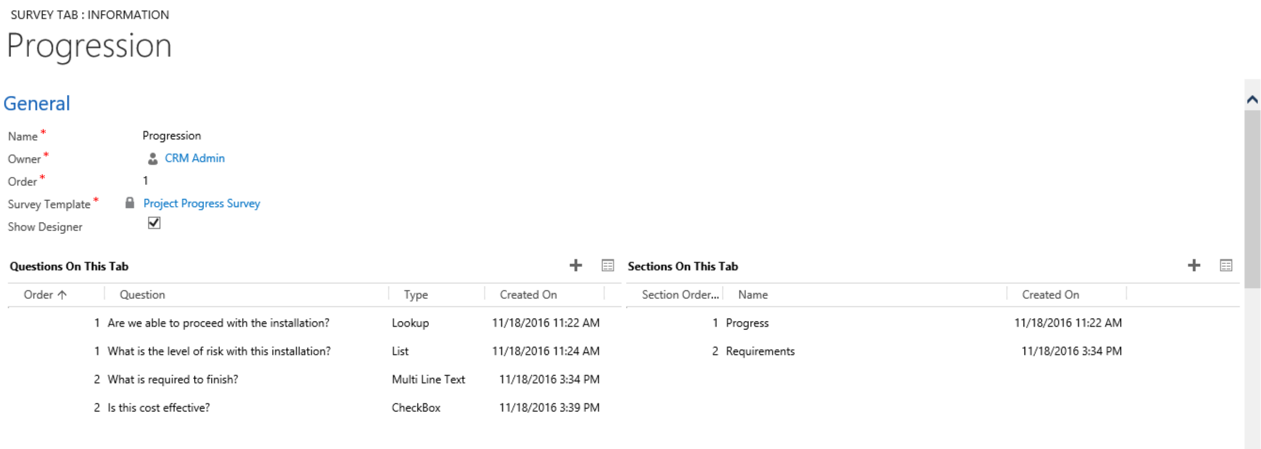


Likewise, when performed in the Resco Mobile Client and no is selected as to whether the project can proceed, the ‘When is the Project scheduled to proceed?’ question is now hidden as it is no longer relevant to the user.



4.1.6 Clear and Hide Section

The 'Clear and Hide Section' Action triggers a Section on the Survey to be cleared and hidden when an answer is selected. To configure this, you must create the Action on the Survey Answer you wish to trigger the Action. The 'Section For Action' field is required and provides a Lookup to select the Section that will be cleared and hidden, this drop-down list gives you the option to select another Section from that Survey Tab.



SURVEY QUESTION : INFORMATION

What is the level of risk with this installation?

Question Details

Question *	What is the level of risk with this installation?
Type *	List
Survey Tab *	Progression
Survey Section	Progress
Question Order For Section *	3
Question Order For Tab	1
Show As Default	☑
Mandatory when visible	☐
Enable Writing To Text Fields	☐

Technical

Owner *	CRM Admin
Target Related Attribute	--
Target Attribute	--

Target Entity Information

Entities	---Select Any Option---
Attributes	---Select Any Option---
Related Lookups	---Select Any Option---

Available Answers

Name ↑	Created On	Order
High	11/18/2016 11:26 AM	1
Low	11/18/2016 11:27 AM	3
Medium	11/18/2016 11:26 AM	

SURVEY ANSWER : INFORMATION

Low

Answer

Answer *	Low
Survey Question *	What is the level of risk with this installation?
Order *	3
Min	--
Max	--

Actions if this answer is chosen

Name ↑	Actions	Created On
Clear and hide Requirements Section	Clear and Hide Secti...	11/25/2016 9:24 AM

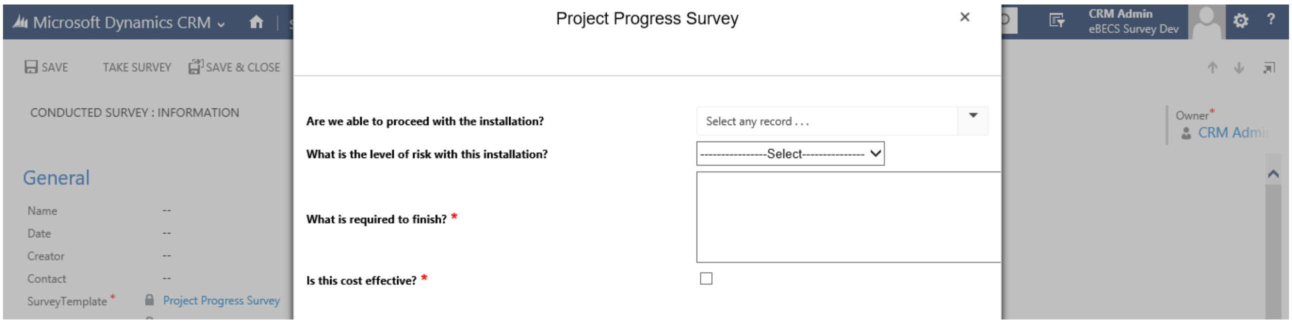
SURVEY ACTION : INFORMATION

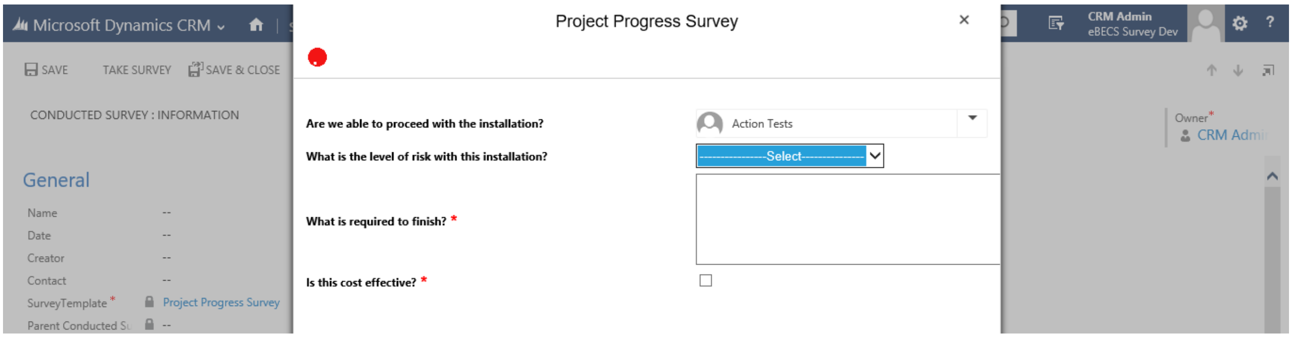
Clear and hide Requirements Section

General

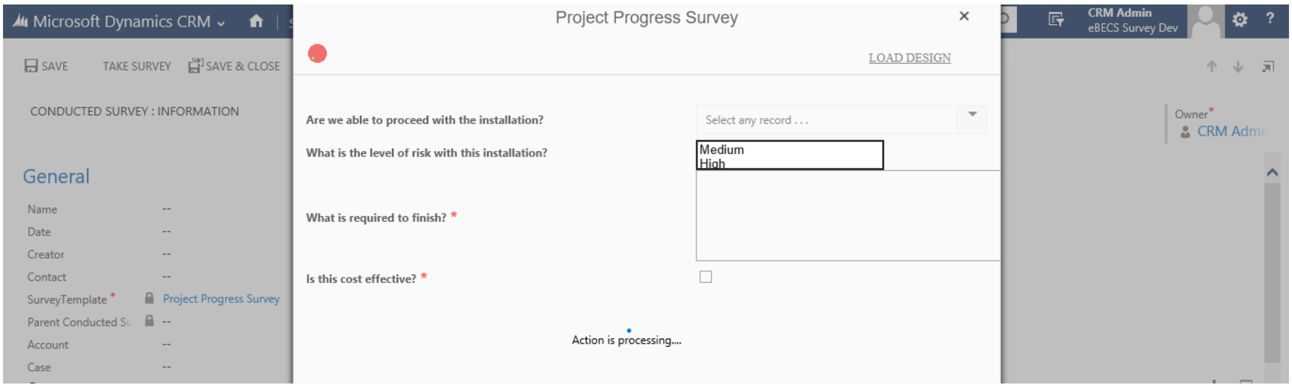
Name *	Clear and hide Requirements Section
Actions	Clear and Hide Section
Survey Answer *	Low
Tab for action	--
Question for action	--
Section for action *	Requirements

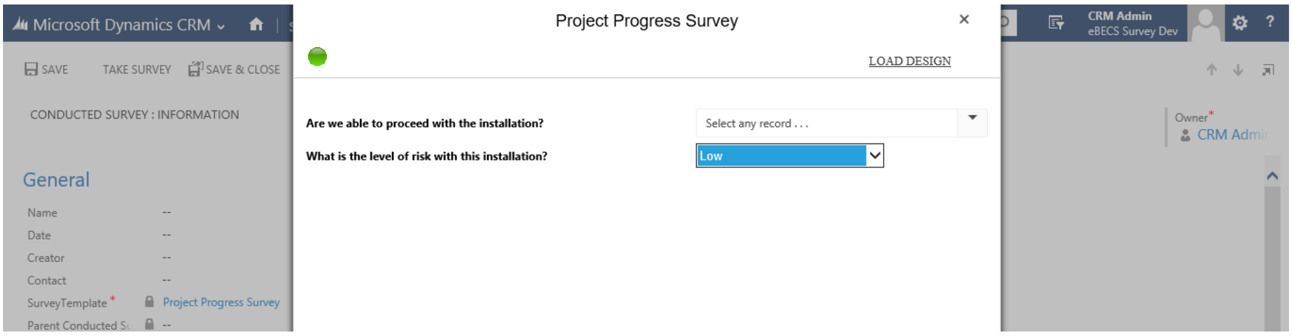
When executed in Dynamics 365, the Clear and Hide Section Action hides the Section when an answer is selected. The below screenshots display this being performed.





When the answer Low is selected from the drop-down list, the Action is processed and the Requirements Section of the Survey is cleared and hidden.

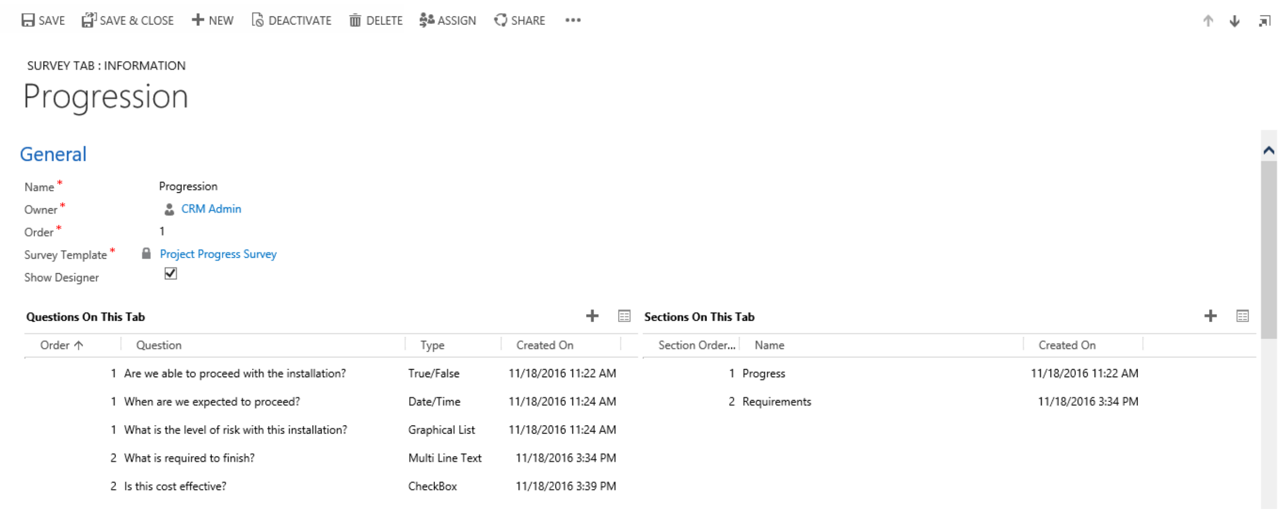




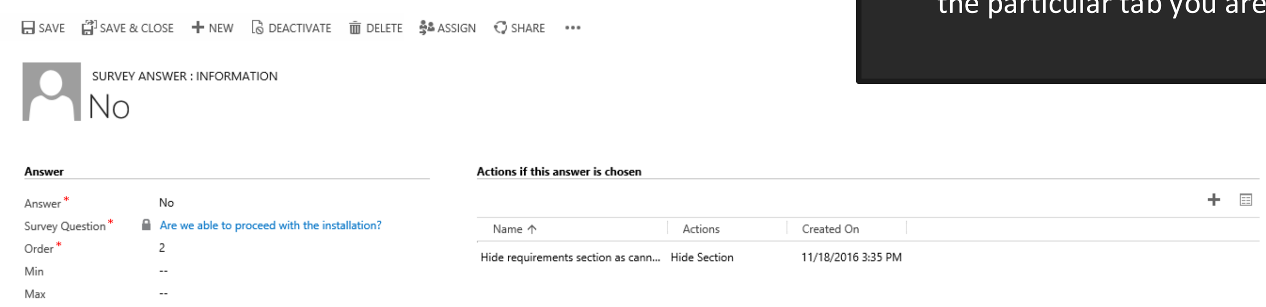
The same functionality occurs when performed in the Resco Mobile Client.

4.1.7 Hide Section

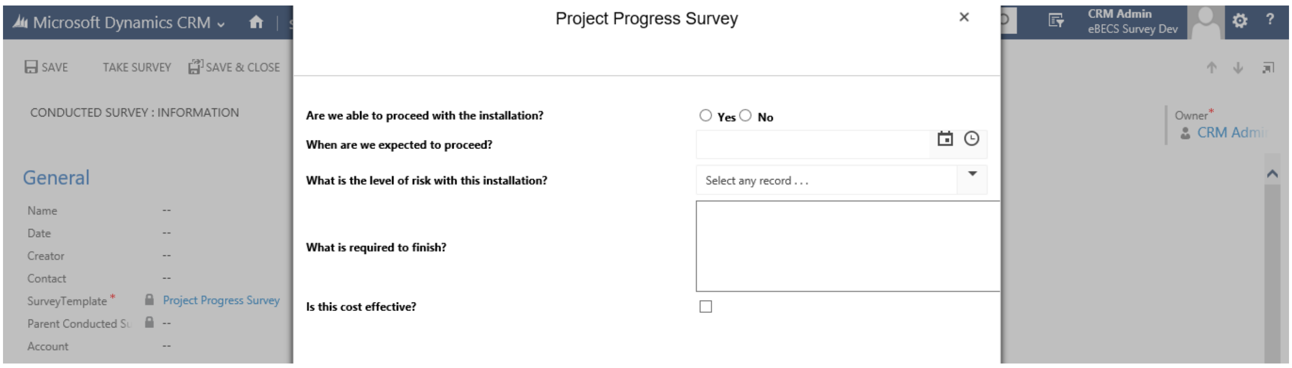
The 'Hide Section' Action triggers a Section to become hidden from the Survey when an answer is selected. To configure this, you must create the Action on the Survey Answer you wish to trigger the Action. The 'Section For Action' field is required and provides a Lookup to select the Section that will be hidden, this drop-down list gives you the option to select another Section from that Survey Tab.

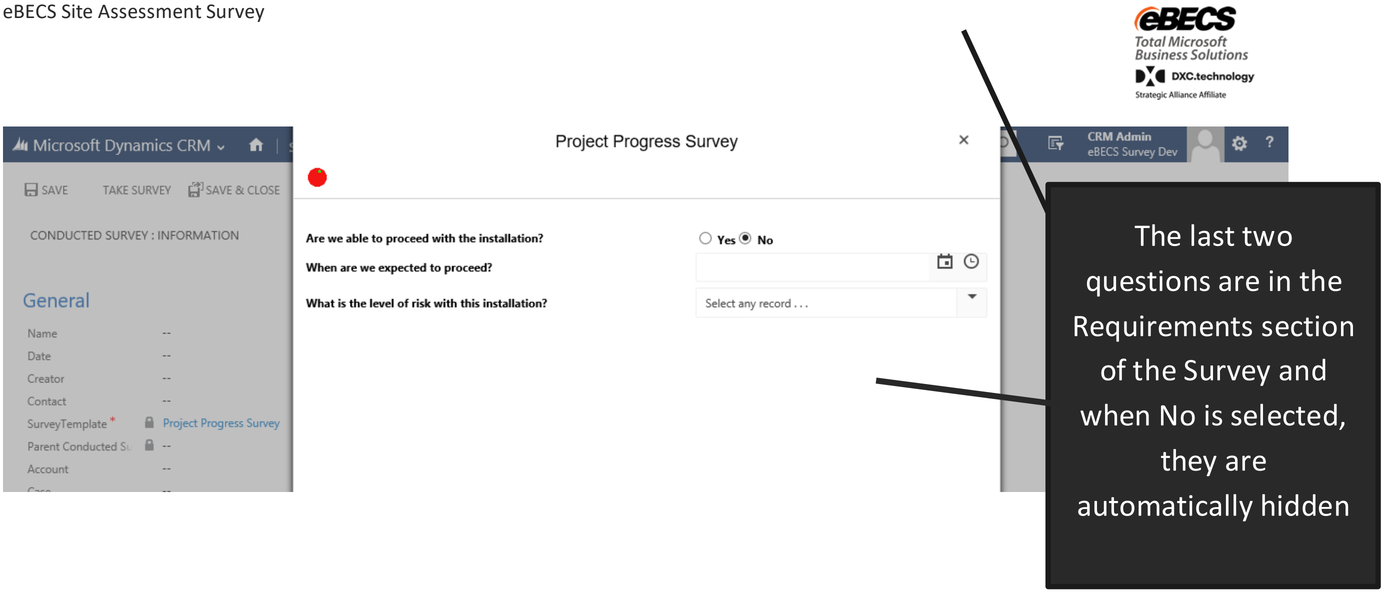


A Lookup field is provided to choose the Section you wish to be hidden, you are only able to hide Sections on the particular tab you are on



When this Survey is performed in Dynamics 365 and the specific Survey Answer is selected, the Section is automatically hidden from the form as seen below.



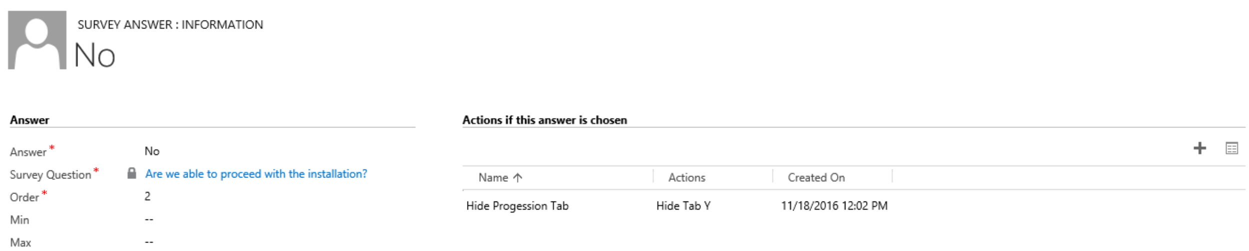


The same Action is triggered in the Resco Mobile Client when No is selected as to whether the installation will proceed. The below screenshots depict this being executed.

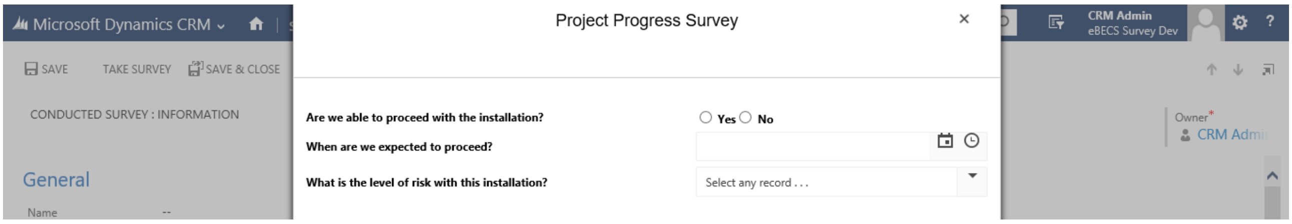
4.1.8 Hide Tab Y

The Hide Tab Y Action allows you to hide a tab when a specific answer is chosen, this can be the current tab you are on (the functionality will direct you to the next tab automatically) or a future tab that is due to be shown in the Survey.

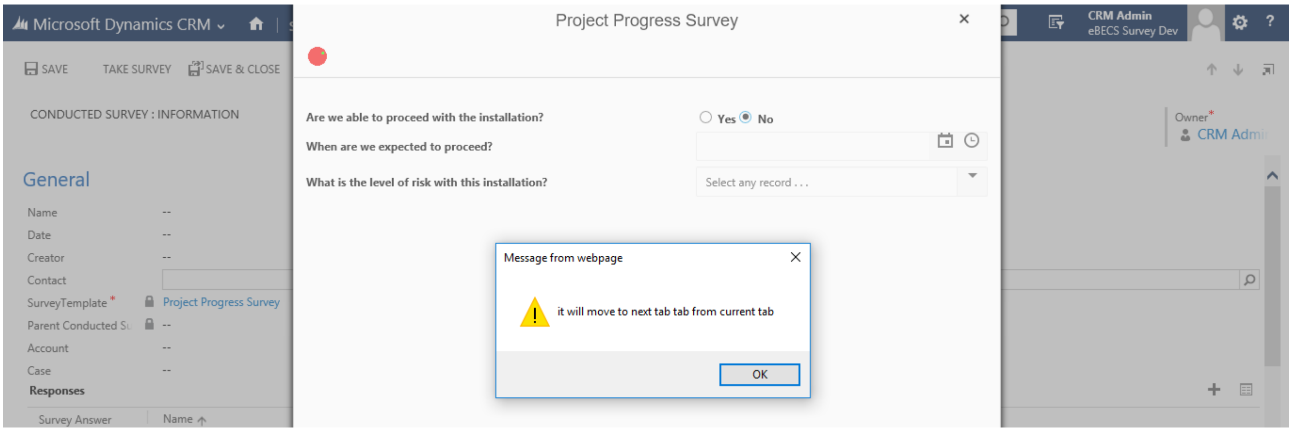
To configure this, you must create the Action on the Survey Answer you wish to trigger the Action. The 'Tab For Action' field is required and provides a Lookup to select the Tab on the Survey that will be hidden, this drop-down list gives you the option to select this Tab.

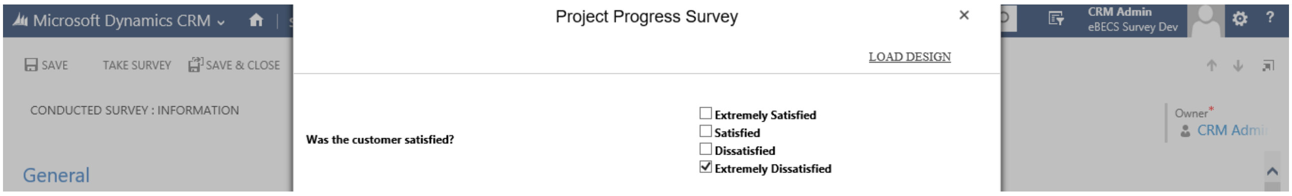


When executed in CRM, this Survey is currently on the first tab 'Progress' with the below questions. However, it has been actioned that when No is selected by the user, this tab will become hidden.

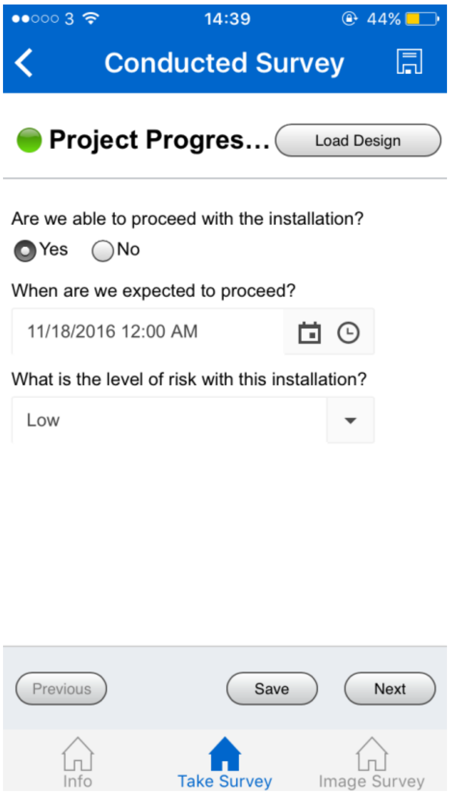


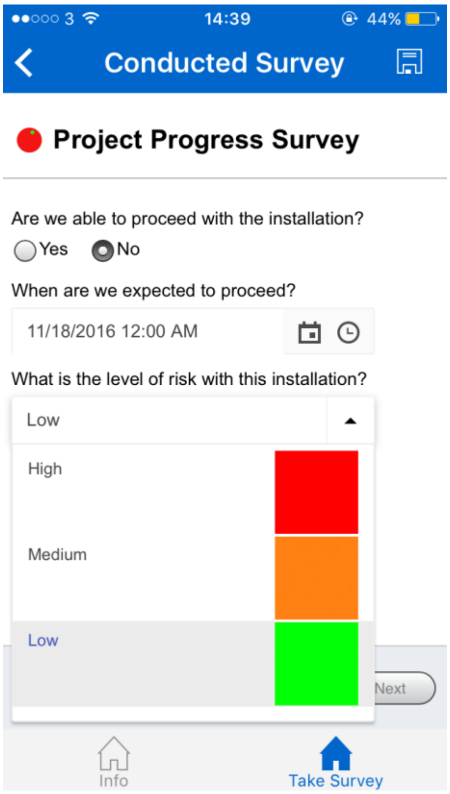
Consequently, it has been configured so this tab is now hidden and CRM notifies the user that they will be directed to another tab, as displayed below.



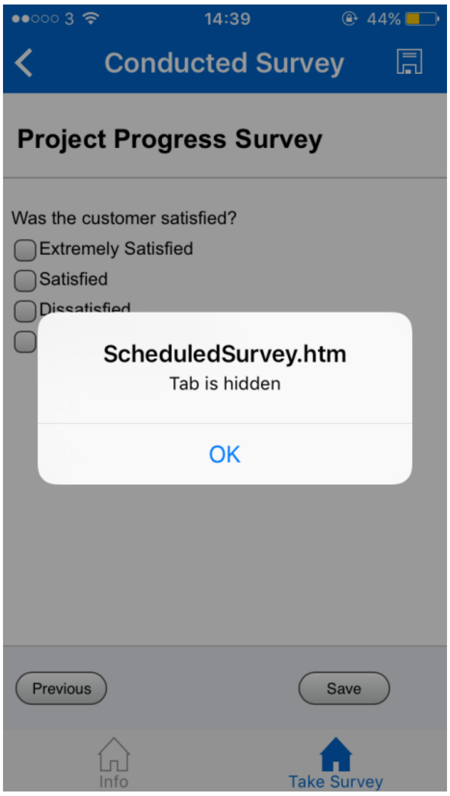


When performed in the Resco Mobile Client, this automatic function does not occur but the tab becomes hidden after moving on to the next tab.



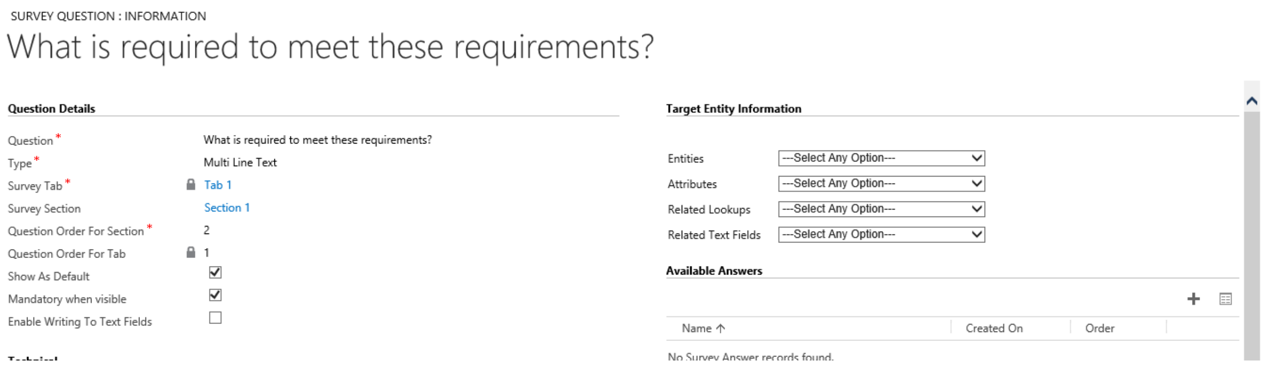


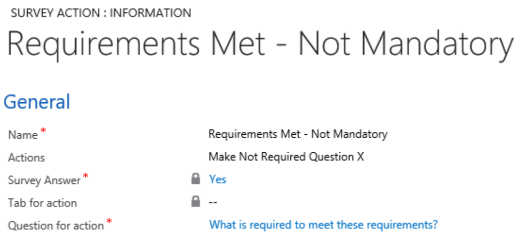
When No has been selected on the question ‘Are we able to proceed with the installation’ and you click ‘next’ to access the next tab, the below message is delivered when trying to view the previous tab.



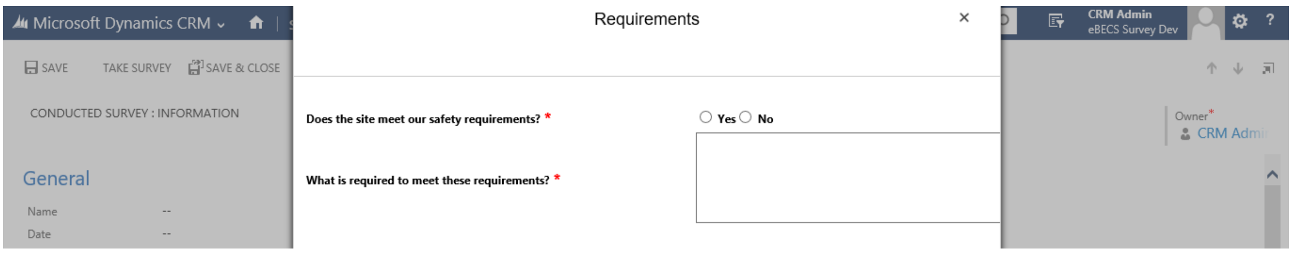
4.1.9 Make Not Required Question X

The ‘Make Not Required Question X’ Action configures where an answer is selected on a Survey Question, it triggers a mandatory question to become no longer required to answer. To configure this, you must create the Action on the Survey Answer you wish to trigger the Action. The ‘Question For Action’ field is required and provides a Lookup to select the Question that will become not required.

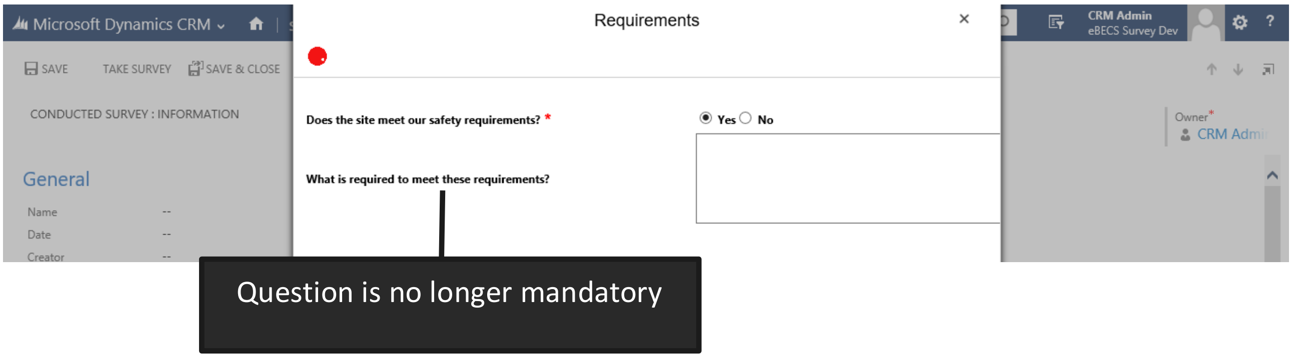




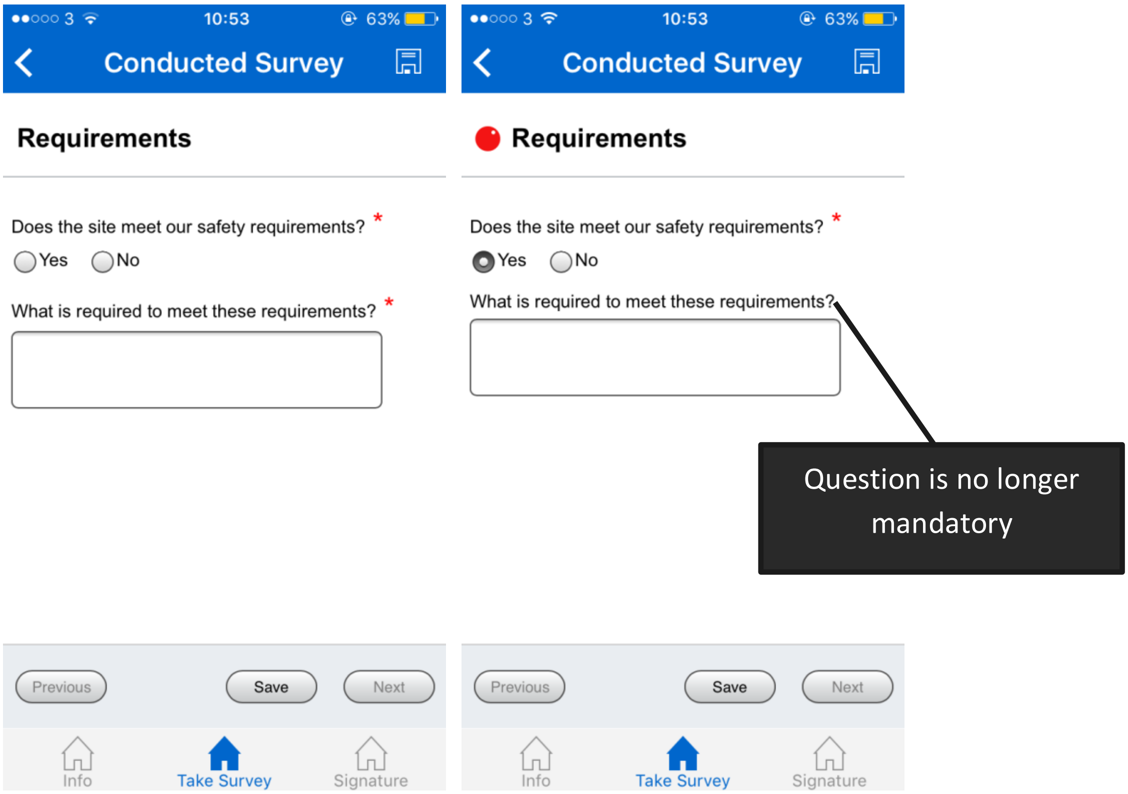
As you can see, when this Survey is performed in Dynamics 365, both questions are initially mandatory to fill in. The Action was added to the answer Yes on the first question ‘Does the site meet our safety requirements’ to make the second question optional to fill in.



Therefore, when Yes is selected, the second question becomes not required.



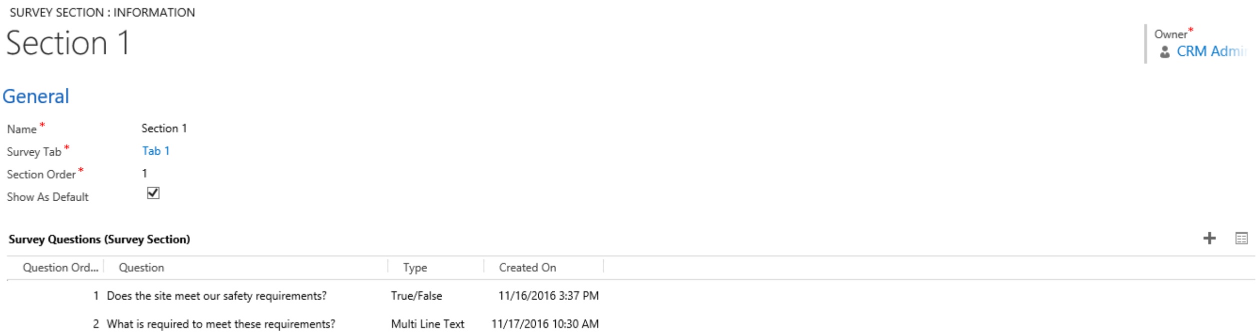
This is no different when performed in the Resco Mobile Client, as you can see the mandatory requirement to fill in the question and the red asterisk have been removed.



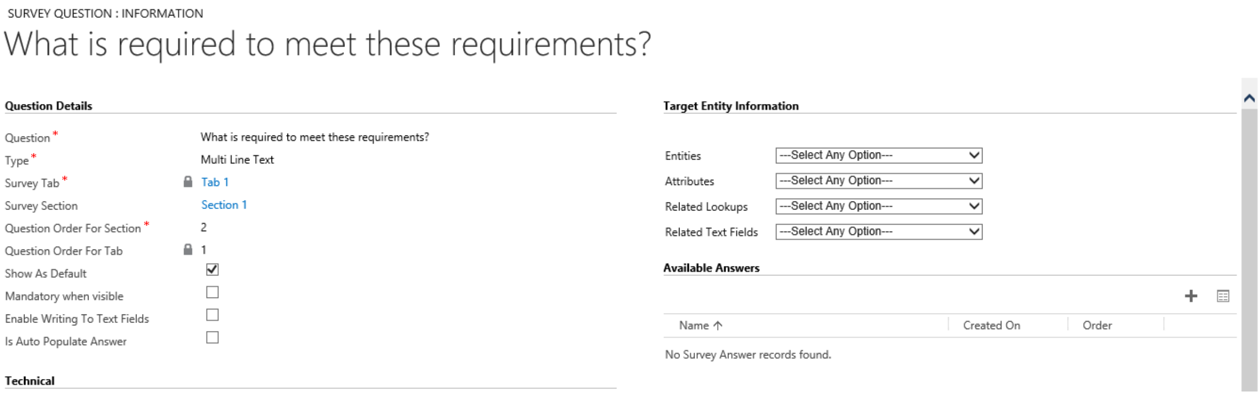
4.1.10 Make Required Question X

The ‘Make Required Question X’ Action configures where an answer is selected on a Survey Question, it triggers a question that was previously not required to become a mandatory field to fill in.

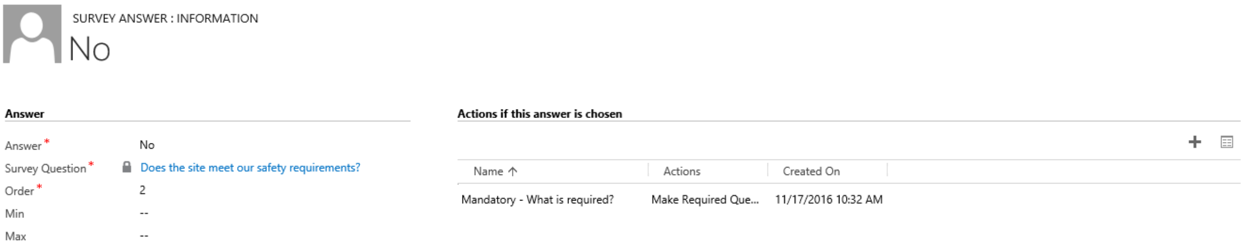
To configure this, you must create the Action on the Survey Answer you wish to trigger the Action. The ‘Question For Action’ field is required and provides a Lookup to select the Question that will become mandatory to fill in.

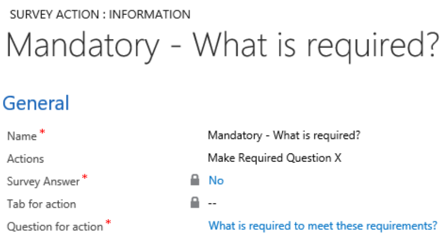


The below question is not currently 'mandatory when visible'.

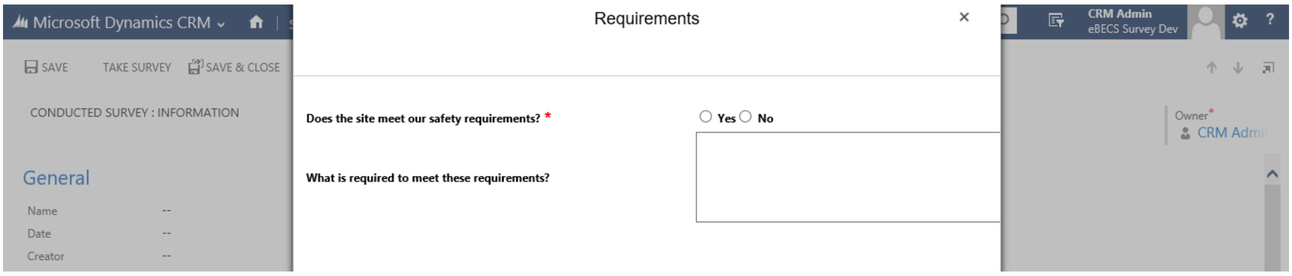


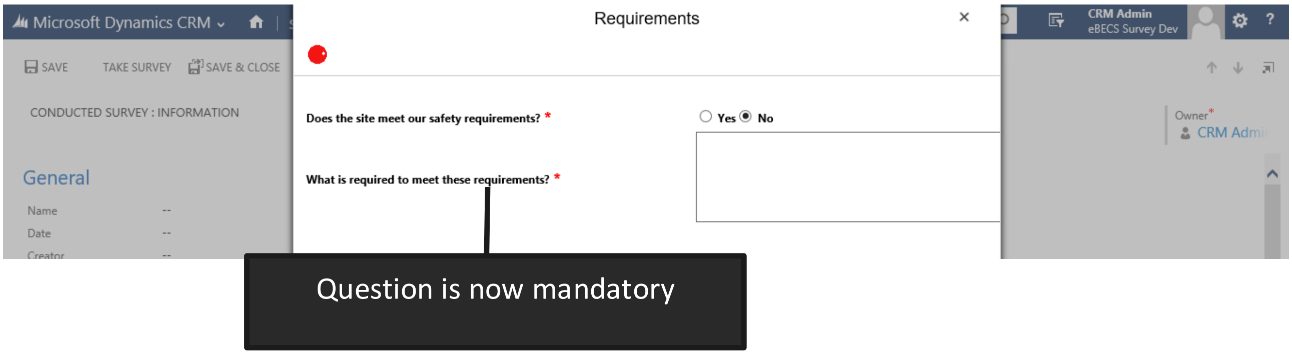
When no is selected, then the user will be required to answer this.



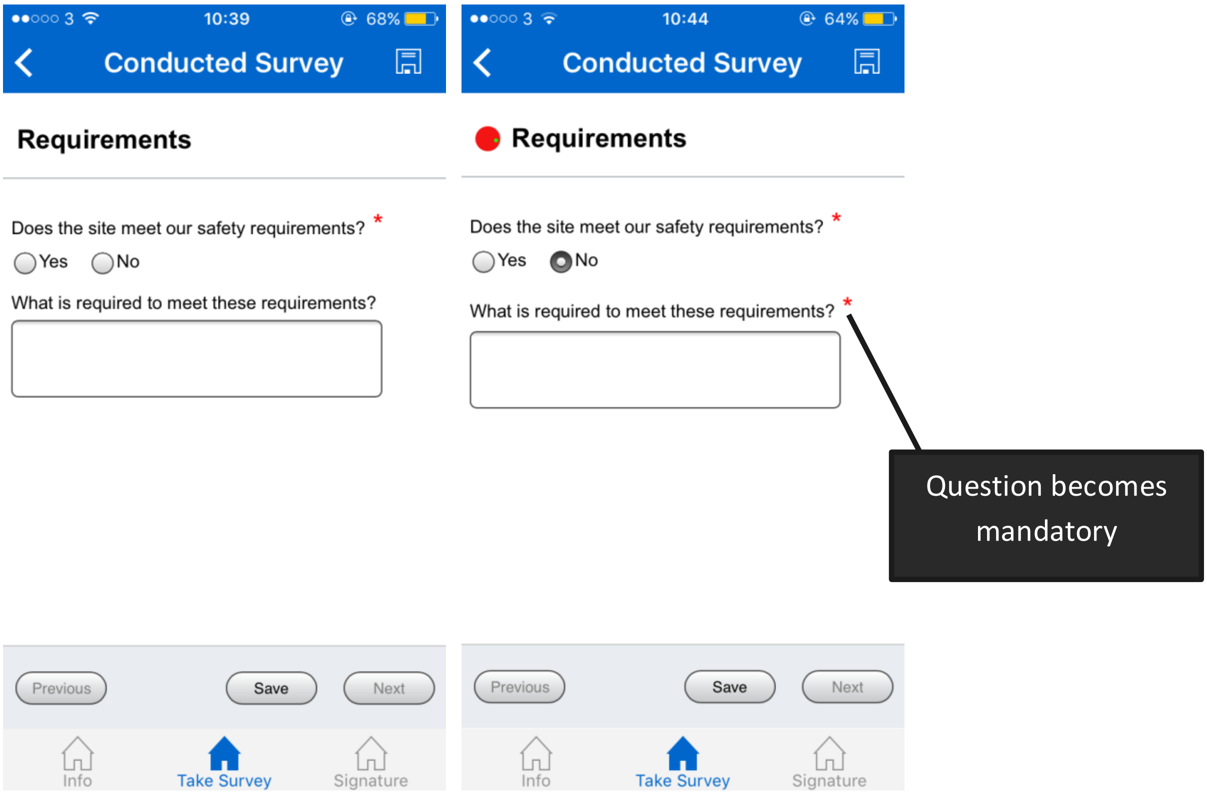


When this is actioned in Dynamics 365, as you can see the second question in this Survey is not mandatory but when 'no' is selected for the first question, this Action is triggered to make the second question required to fill in.





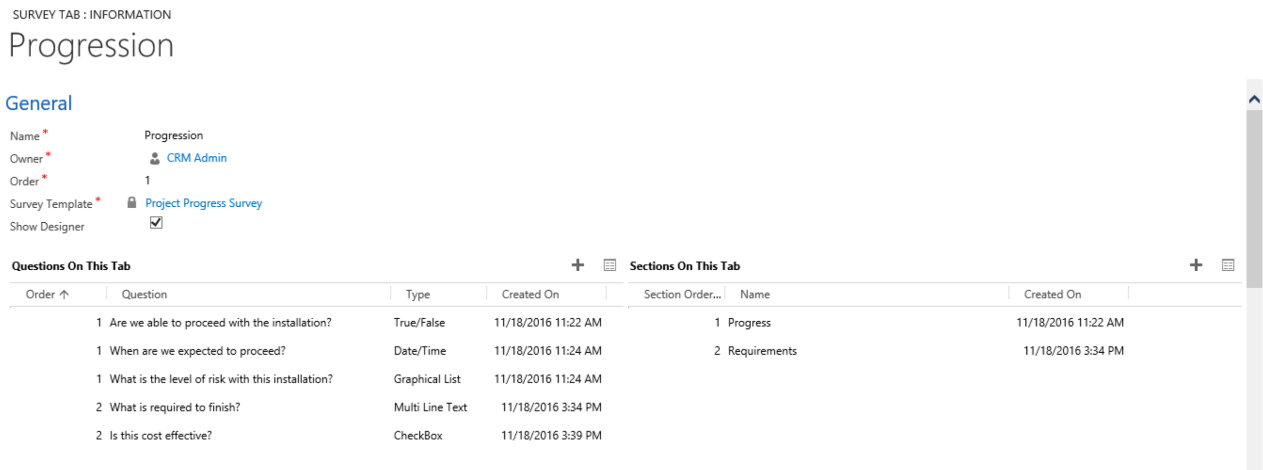
When performed in the Resco Mobile Client, the same functionality occurs and the question becomes mandatory.

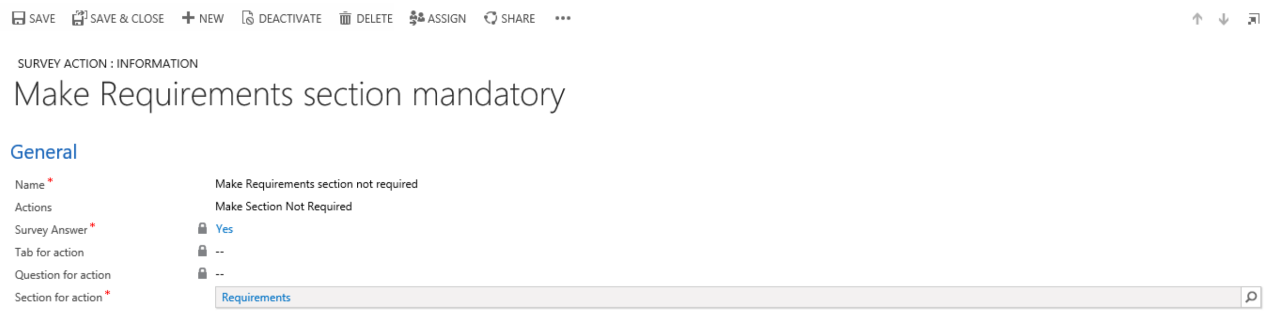


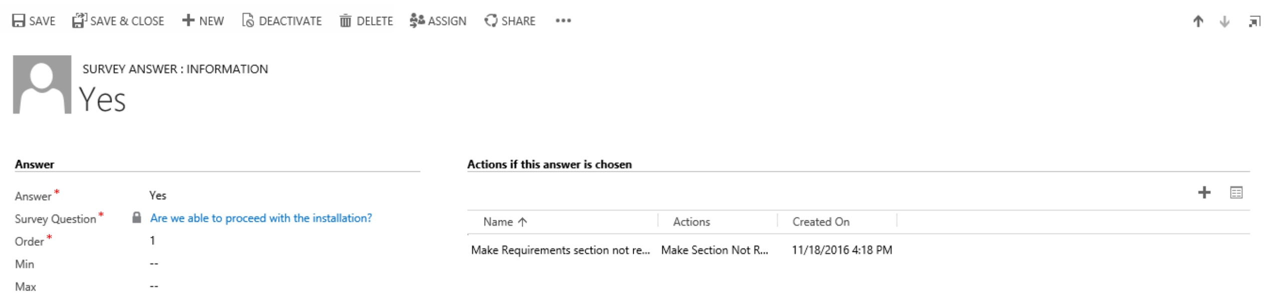
4.1.11 Make Section Not Required

This Action enables questions within a Section that were mandatory to be made not required after a certain Survey Answer is selected. All of the Questions within this Section will become non mandatory to fill out, regardless of their previous status.

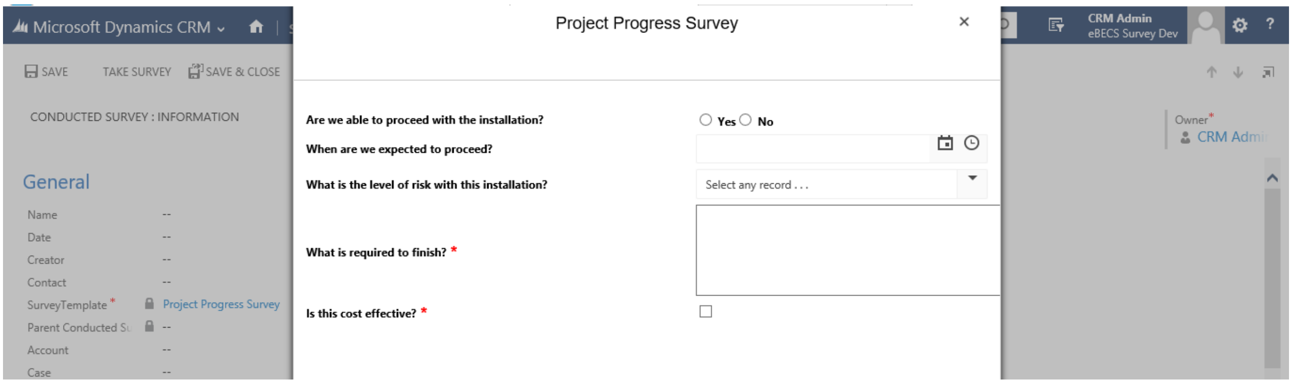
To configure this, you must create the Action on the Survey Answer you wish to trigger the Action. The 'Section For Action' field is required and provides a Lookup to select the Section on this Tab that will become not required.

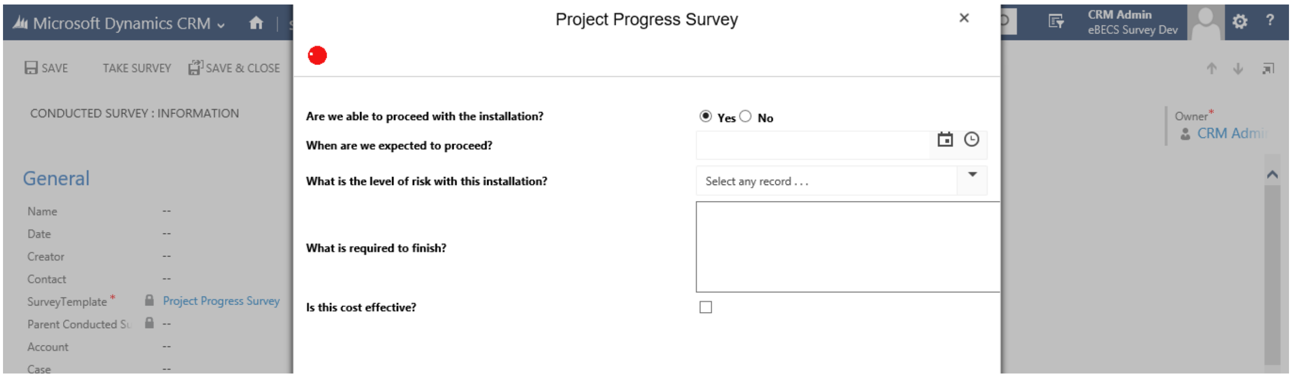






When performed in Dynamics 365 and the Yes answer is selected, as displayed below any questions that were mandatory in that Section are made unrequired.

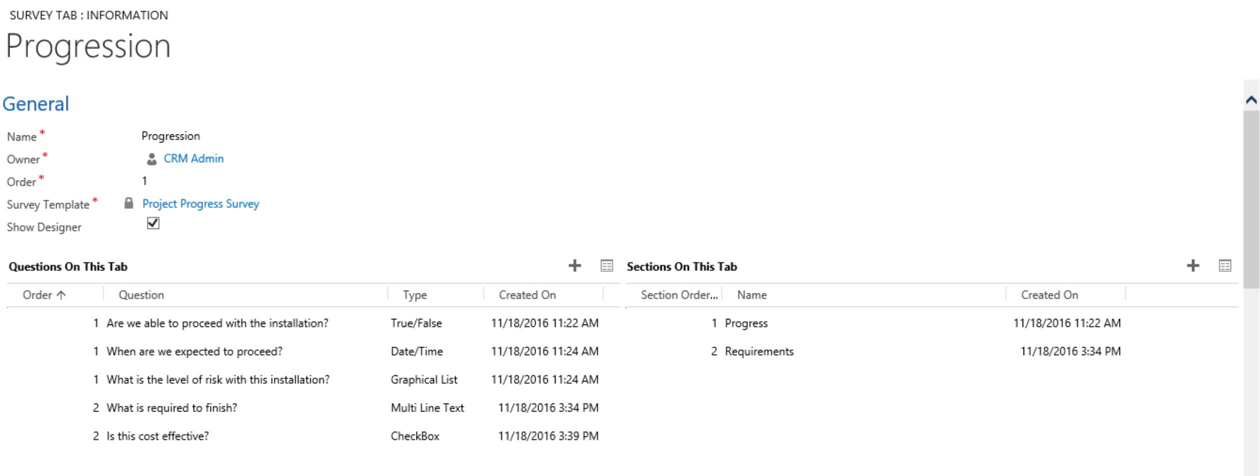


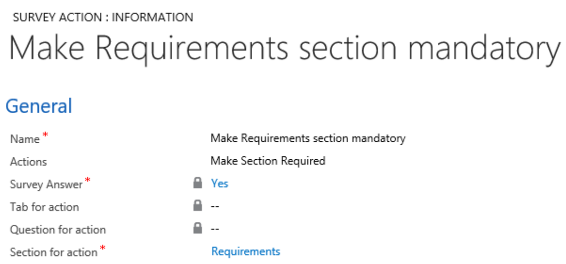


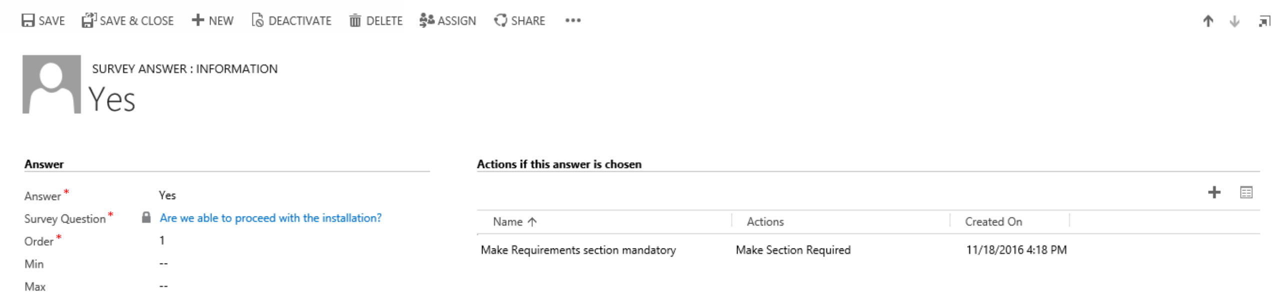
When executed in the Resco Mobile Client, the questions within this specific question are changed from mandatory to unrequired when the selected Answer is chosen.

4.1.12 Make Section Required

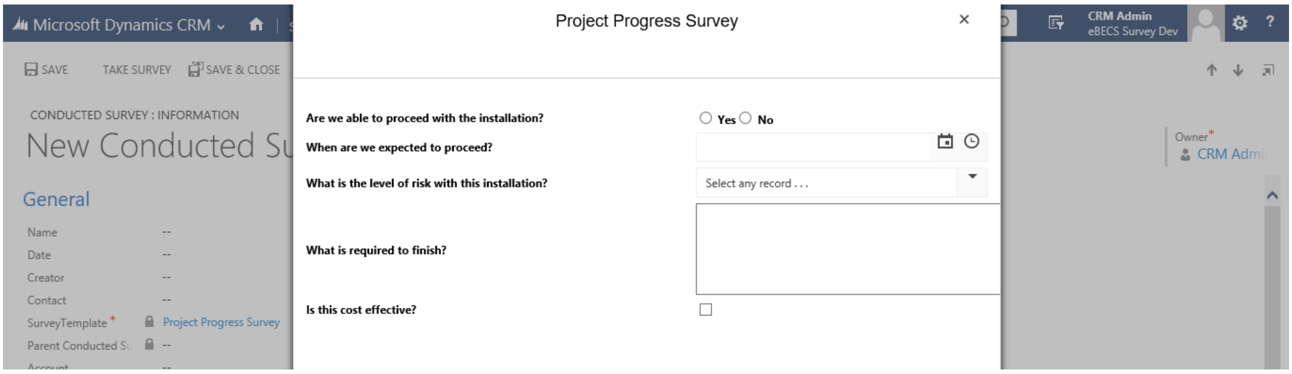
The opposite functionality to the above Action type, the Make Section Required Action triggers all questions within a certain Section to become mandatory when a certain answer is selected.



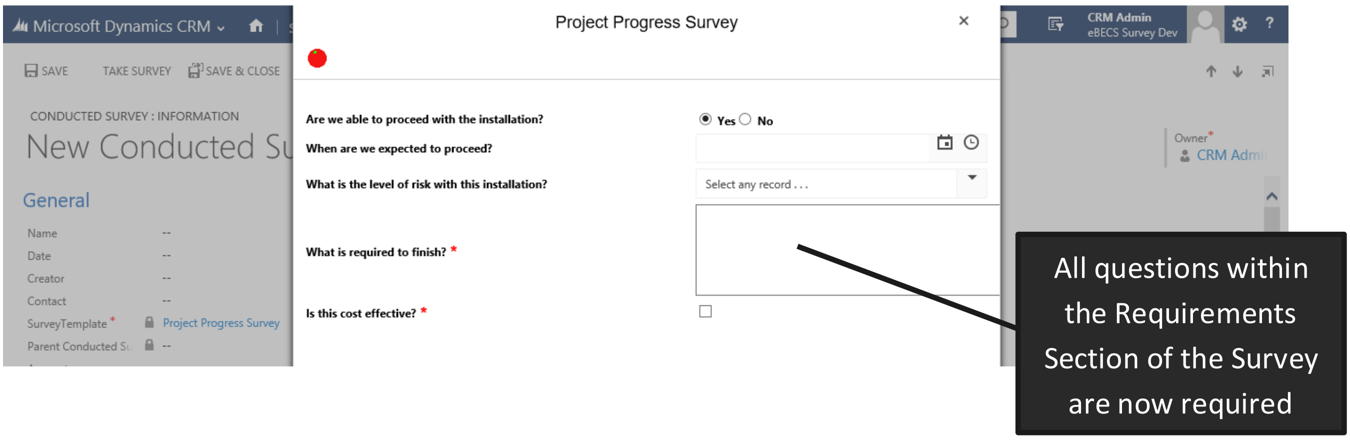




The below screenshots display this being executed in Dynamics 365; as you can see, the Section (requirements) that contains the last two questions, neither are mandatory.



When Yes is selected, the Action is triggered and all questions in the Requirements Section become mandatory.

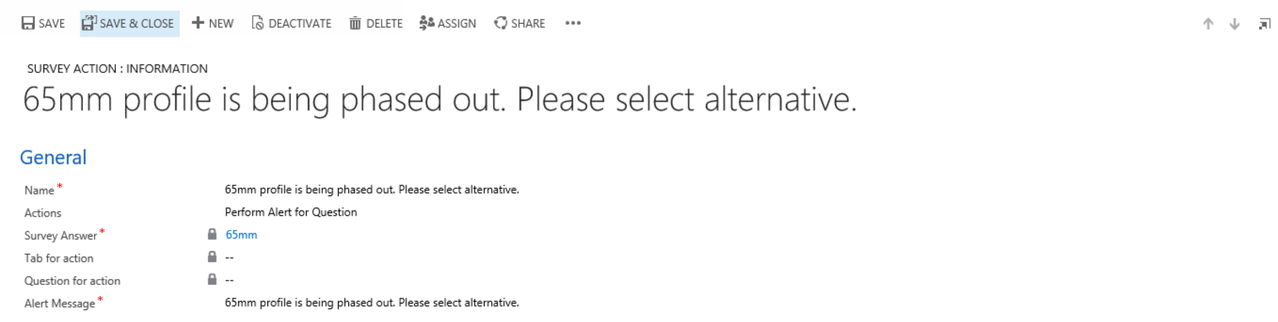


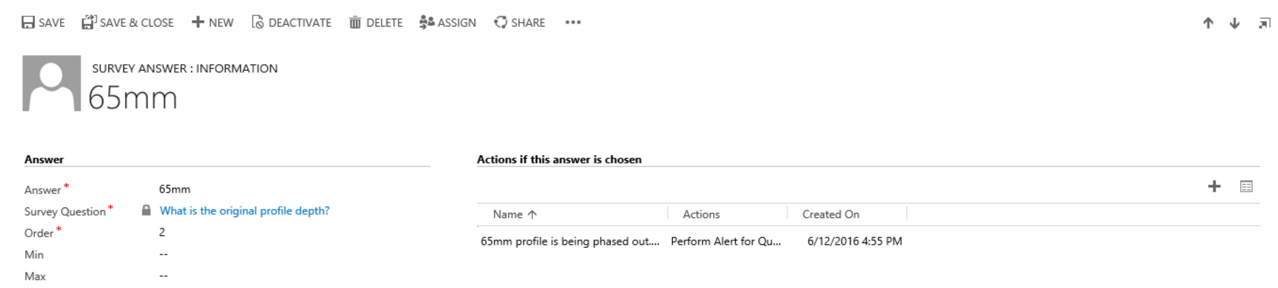
The same Action is triggered when this Survey is performed in the Resco Mobile Client.

4.1.13 Perform Alert for Question

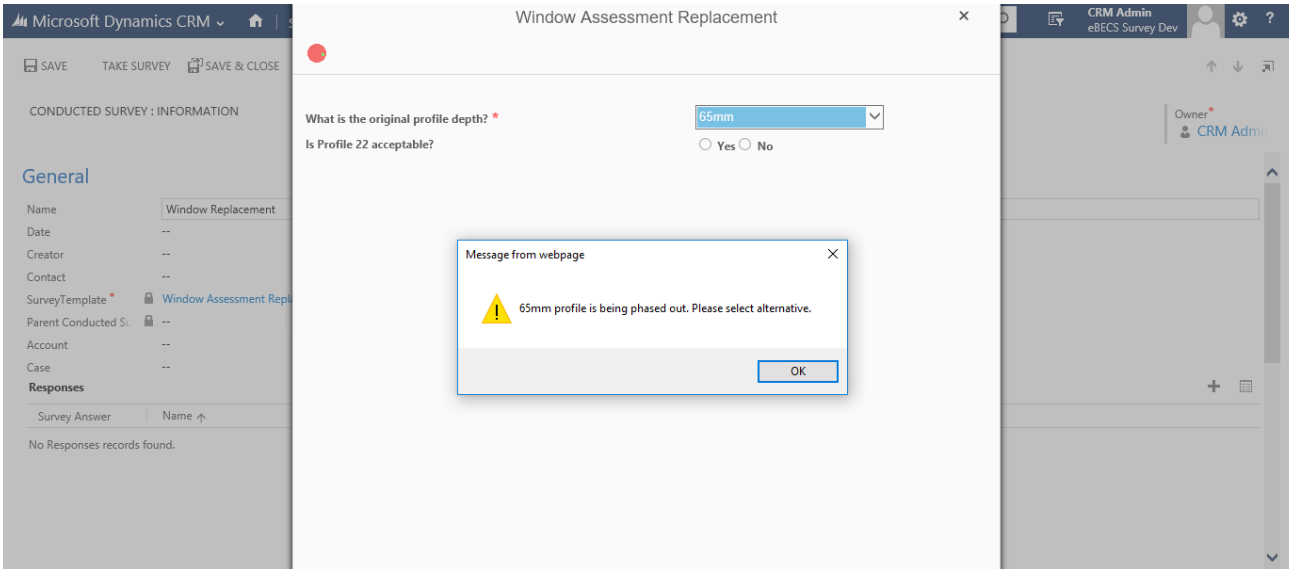
The Perform Alert for Question action triggers an alert message when a specific answer is chosen. To enable an alert message, you must create a new action and select the Perform Alert for Question. The 'Name*' field on the Survey Action form is required but the actual alert message that will be triggered on the survey is located at the bottom of the form in the 'Alert Message*' field.

To configure this, you must create the Action on the Survey Answer you wish to trigger the Action. The 'Name' field is required and the 'Alert Message' field will appear when 'Perform Alert for Question' is chosen from the Actions list.





Below is an example of this specific Perform Alert for Question action being executed in a survey within Dynamics 365.

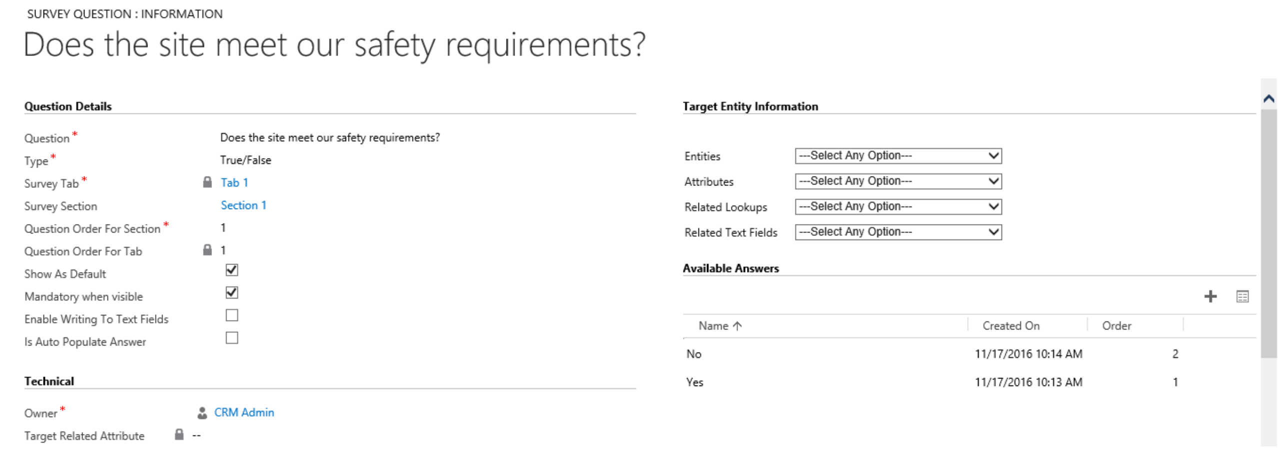


In addition, the below screenshots depict this Alert Message being executed when the 65mm answer is selected on the Resco Mobile Client.

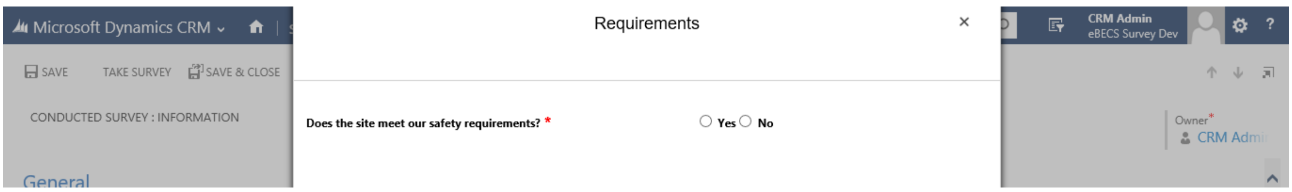
4.1.14 Set Answer Colour Red

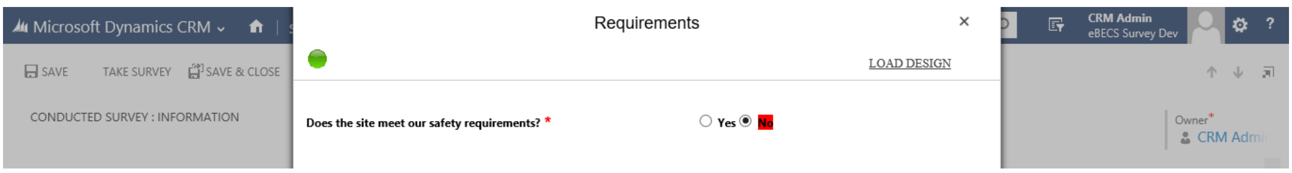
'Set Answer Colour Red' is self-explanatory in its functionality, highlighting a Survey Answer in red when an answer is chosen. This can be utilised well to highlight an answer that could be high risk or needs to stand out.

To configure this, you must create the Action on the Survey Answer you wish to be highlighted in red and fill in the Name field.

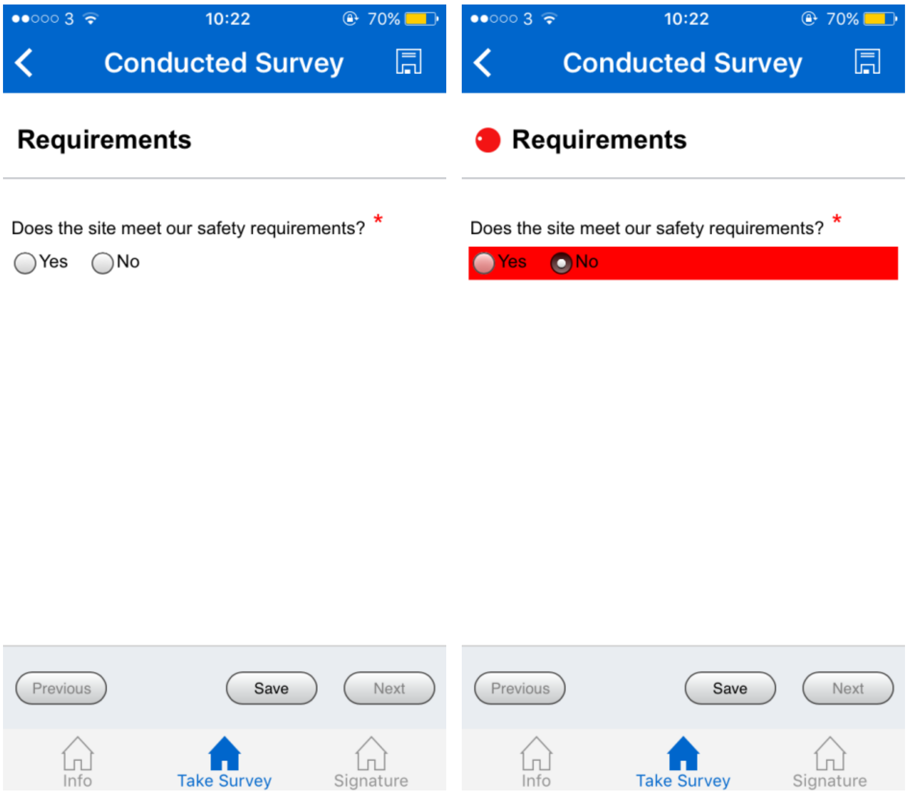


Below is an example of an instance where this could be used. This survey asks the technician whether the site fulfils the safety requirements and when no is selected, the answer is highlighted in red. When performed in Dynamics 365:





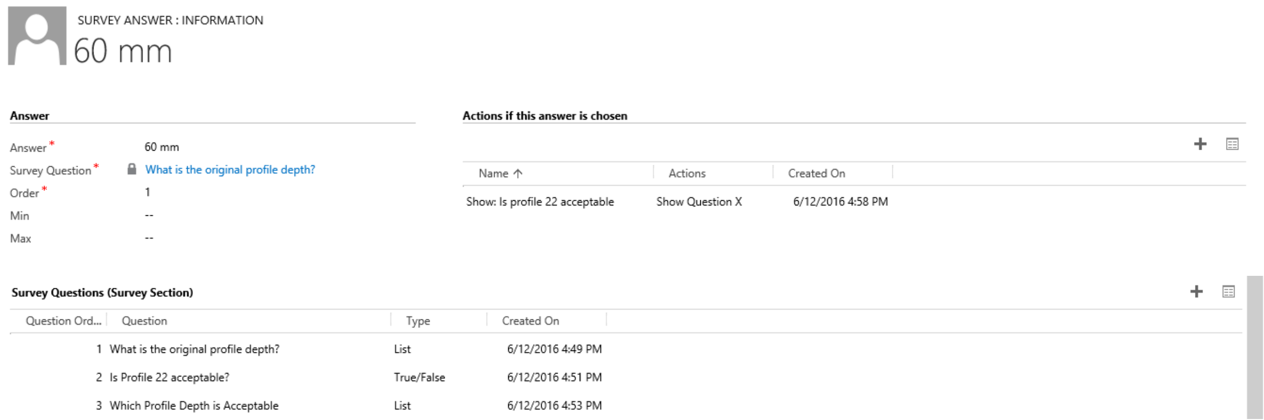
When performed in Resco Mobile Client, this works the same although the full Survey answer line is highlighted, as seen below.



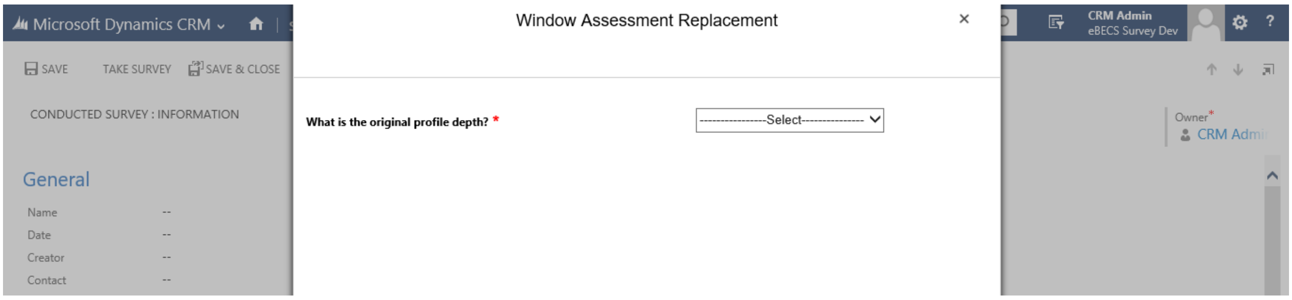
4.1.15 Show Question X

Action 'Show Question X' configures when a certain answer is selected on a survey question, this triggers a specific question to appear as the next question on the survey. This specific question that you wish to appear can be found in a Lookup at the bottom of the Action form and this field becomes active when 'Show Question X' is selected as the Action.

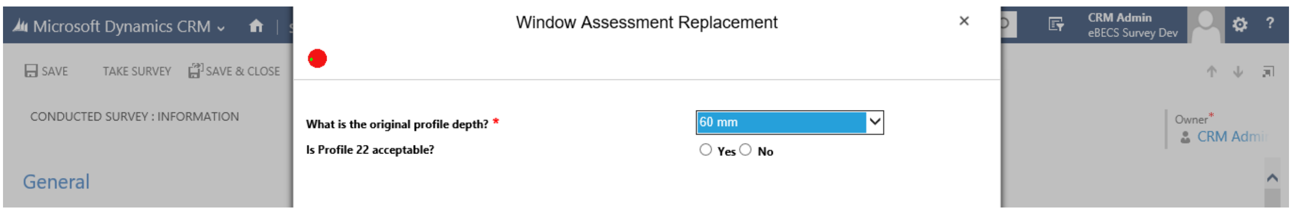
To configure this, you must create the Action on the Survey Answer you wish to trigger the Action. The 'Question For Action' field is mandatory and provides a Lookup to Questions on that Section, the Survey Question selected is the essentially 'Question X' which will appear.



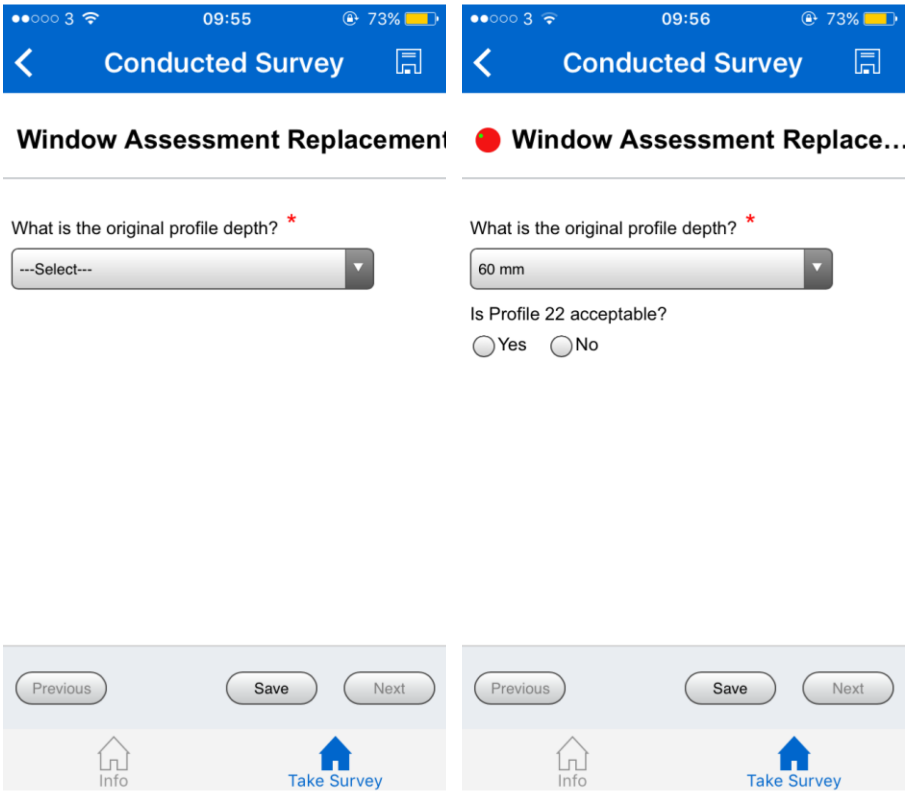
Below shows this Action being executed in Dynamics 365. As you can see the Question is not initially available.



When 60mm is selected, Question X (Is Profile 22 acceptable) appears and becomes available to answer.



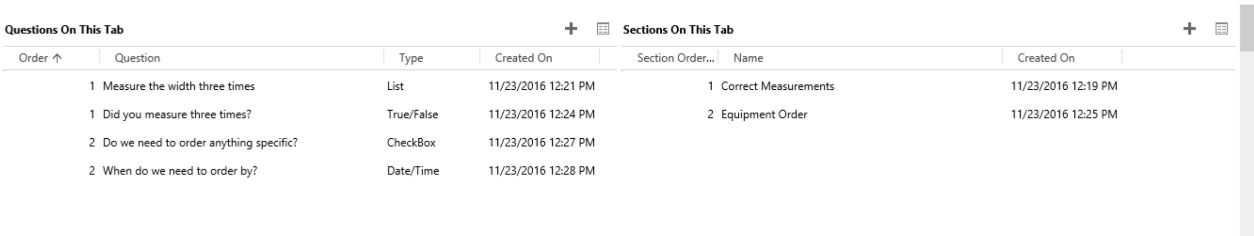
The below screenshots show the same survey being performed in the Resco Mobile Client.



4.1.16 Show Section

The ‘Show Section’ Action triggers a Section that is not automatically shown to become shown when a Survey Answer is selected.

To configure this, you must create the Action on the Survey Answer you wish to trigger the Action. The ‘Section For Action’ field is mandatory and provides a Lookup to the Sections, the Survey Section selected is the one which will appear when triggered.

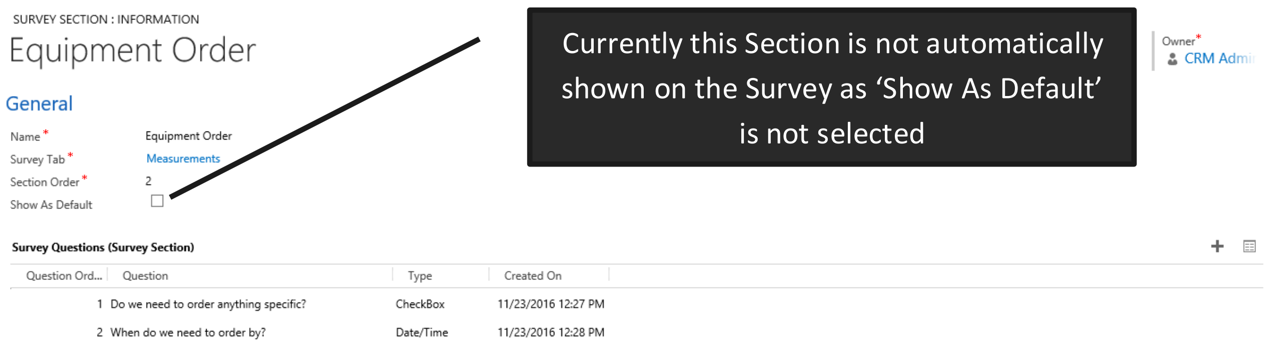


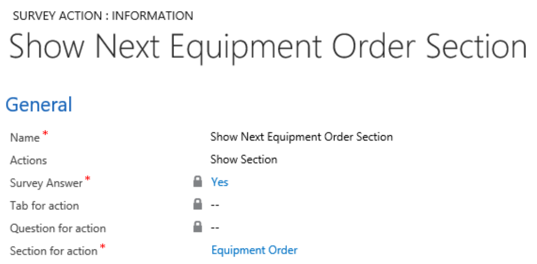
Questions On This Tab

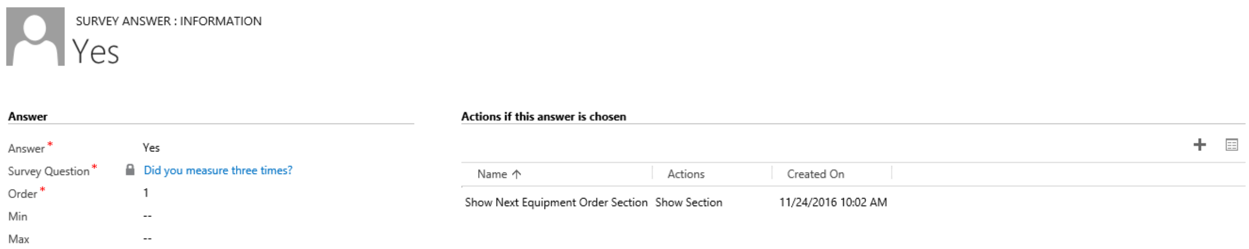
Order ↑	Question	Type	Created On
1	Measure the width three times	List	11/23/2016 12:21 PM
1	Did you measure three times?	True/False	11/23/2016 12:24 PM
2	Do we need to order anything specific?	CheckBox	11/23/2016 12:27 PM
2	When do we need to order by?	Date/Time	11/23/2016 12:28 PM

Sections On This Tab

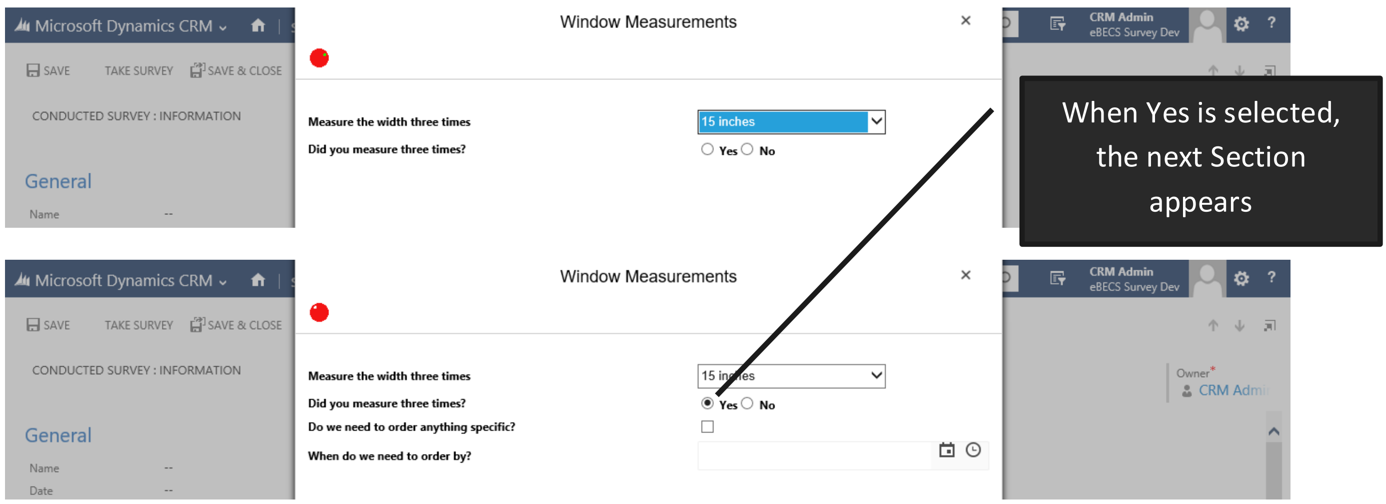
Section Order...	Name	Created On
1	Correct Measurements	11/23/2016 12:19 PM
2	Equipment Order	11/23/2016 12:25 PM







When performed in Dynamics 365.

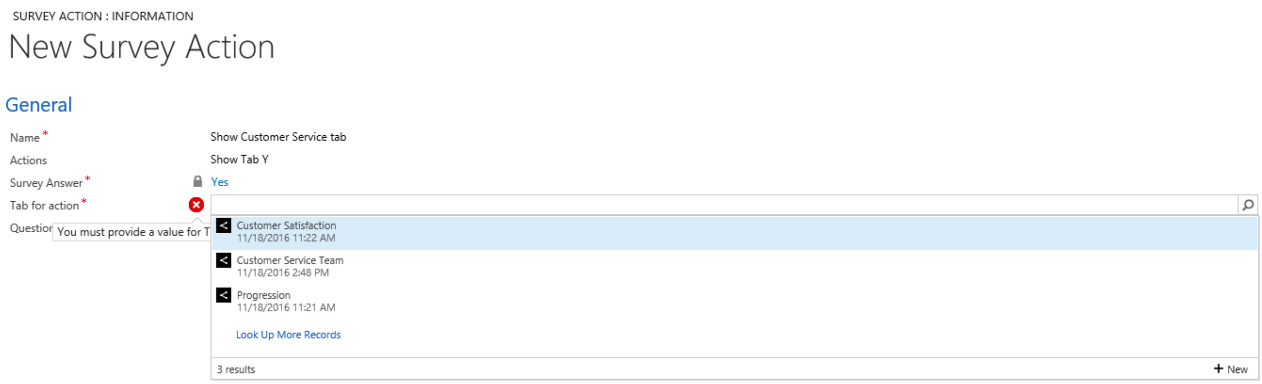


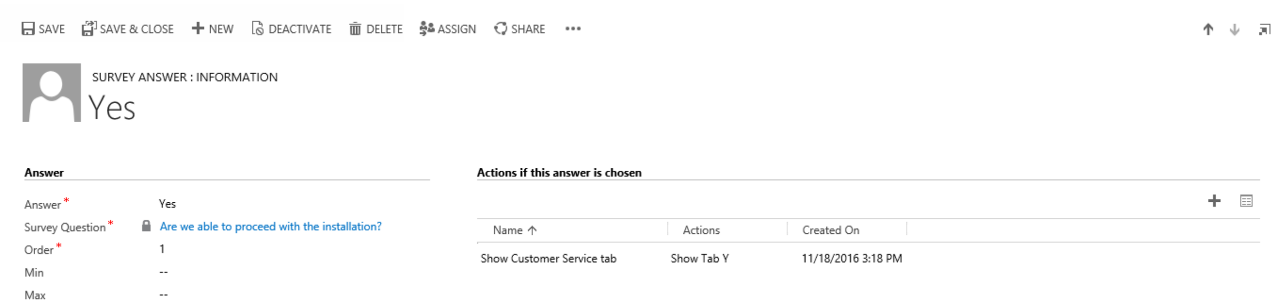
Performed in the Resco Mobile Client.

4.1.17 Show Tab Y

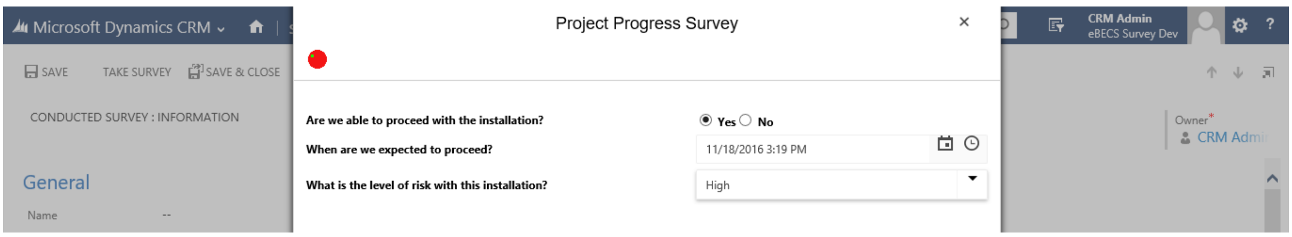
The 'Show Tab Y' Action triggers any tab that may be hidden or inaccessible to now become available to the user.

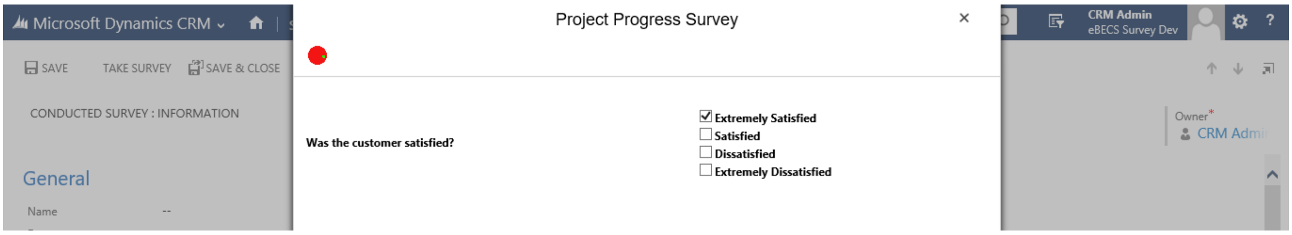
To configure this, you must create the Action on the Survey Answer you wish to trigger the Action. The 'Tab For Action' field is mandatory and provides a Lookup to the Survey Tabs, the Survey Tab selected is the Tab which will appear.

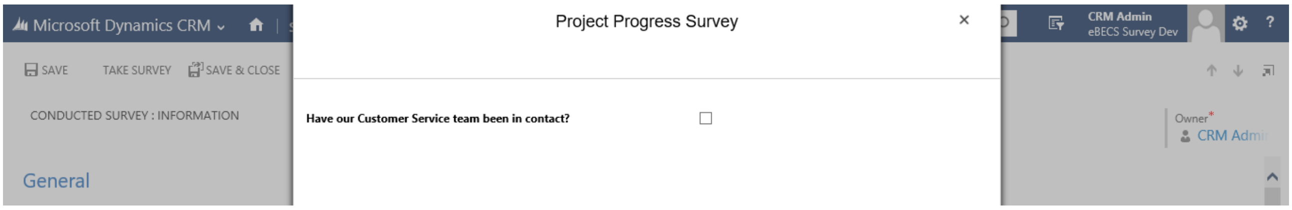




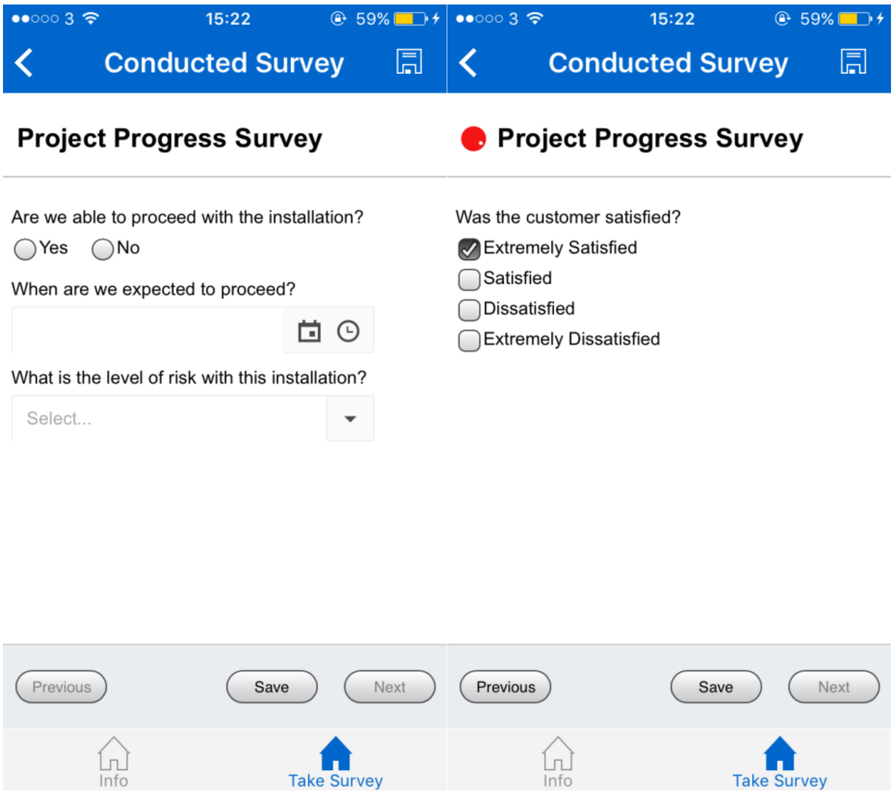
Performed in Dynamics 365, this allows that tab to be shown and the questions to be answered.

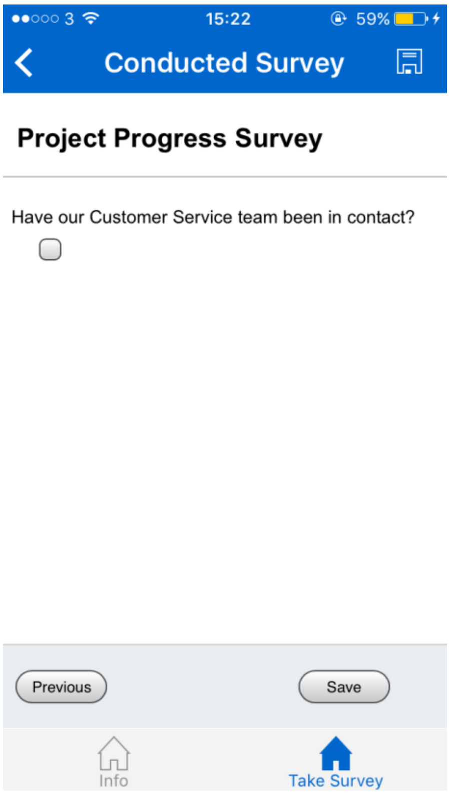






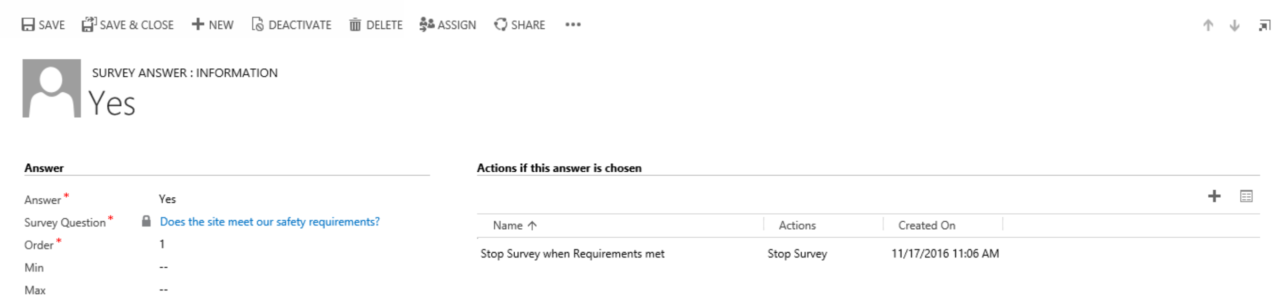
The below screenshots display the same survey executed in the Resco Mobile Client and again you can view the Customer Service tab.



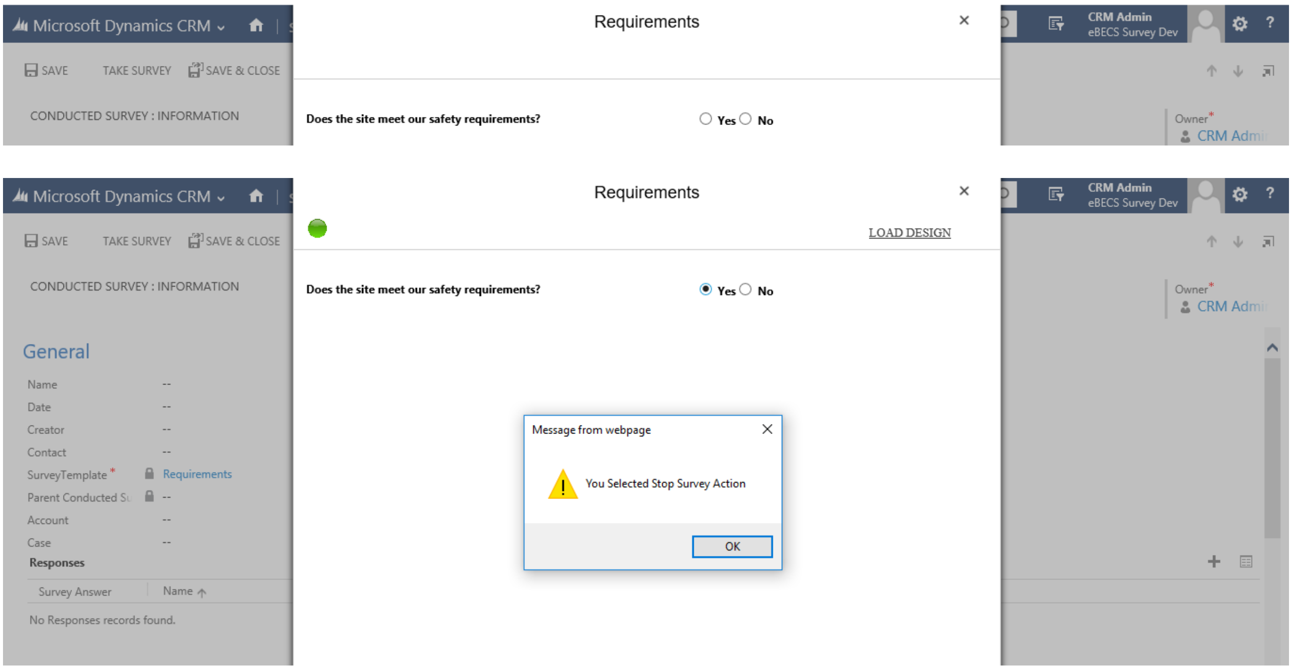


4.1.18 Stop Survey

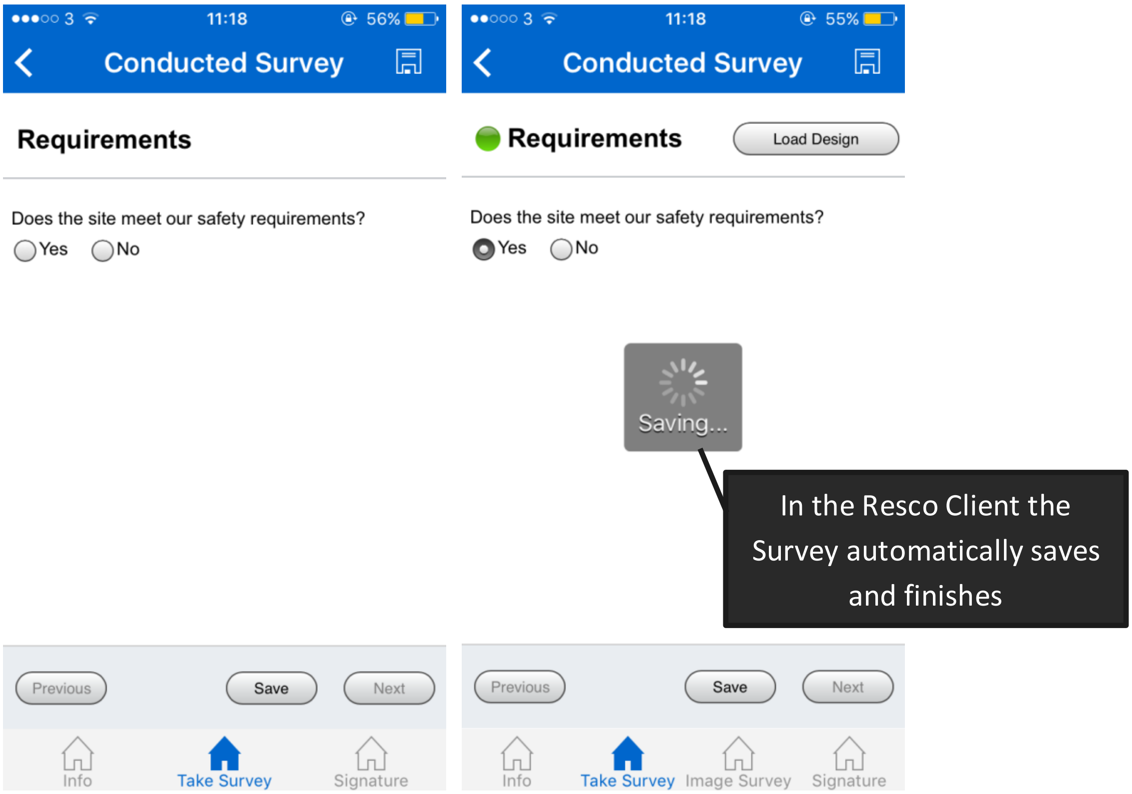
The ‘Stop Survey’ Action will trigger the Survey to be stopped when an answer is selected. To configure this, you must create the Action on the Survey Answer you wish to trigger the Action and stop the Survey.



Performed in CRM:



Performed in Resco Mobile Client. When performed in this client, the survey status automatically goes green and the survey closes.


11:18
Conducted Survey
Requirements
Does the site meet our safety requirements?
Yes
No
Previous
Save
Next
Info
Take Survey
Signature
11:18
Conducted Survey
Requirements
Load Design
Does the site meet our safety requirements?
Yes
No
Saving...
In the Resco Client the Survey automatically saves and finishes
Previous
Save
Next
Info
Take Survey
Image Survey
Signature