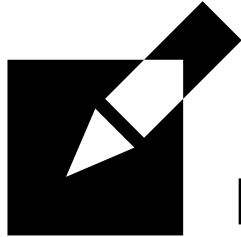


March 11, 2020

# DXC Intelligent Survey

**Powerful extended functionality for Dynamics 365**

# Key Benefits

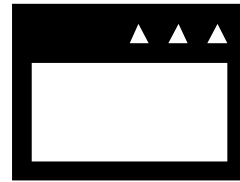


## Reduce Cost

---

Replace paper-based forms with guided template-driven surveys for a wide variety of business processes, including:

- Risk and Site Assessments
- Inspections
- Call Scripting
- Sales Visits
- Health and Safety Assessments

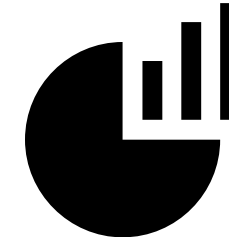


## Quick and Flexible

---

Complex survey templates can be created by Dynamics 365 users without having to use the configuration tool.

Empower your people in the field with interactive surveys and assessments that they can fill in when offline at the customer site.



## Increase Efficiency

---

Increase customer satisfaction by following a scripted, structured approach for capturing information.

Automatically create a report of the completed survey which is emailed to the customer.



# Key Concepts

## Survey Execution

Run surveys directly from Dynamics 365, on a mobile or tablet client, from a Microsoft Portal or Azure Web App.

## Survey Templates

Quick and flexible Survey template creation using an intuitive drag and drop designer. Versioning and Auditing provides control.

## Allocation Rules

Automatically create Surveys off any entity when new records are created.

## Reporting

Generate a HTML5 PDF report or report off a custom entity using Word Mail Merge.

March 11, 2020

# Survey Execution

# Survey Execution Options

**Field Service Mobile and Tablet App**

**Resco Mobile CRM Mobile and Tablet App**

**Inside Dynamics 365 Customer Engagement**

**Run Inside a Microsoft Portal**

**Inside an Azure Web App**

# Microsoft Field Service Mobile/Tablet app

Execute Surveys on iOS, Android or Windows Mobile/Tablet devices in Online or Offline Mode.

Service Mobile

Conducted Surveys

Scheduled Conducted Surveys

Search Filter Name

Dashboard

Accounts

Contacts

Conducted Surveys

Bookings

Work Orders

Products

Customer Assets

Time Off Requests

Activities

Scan Customer Asset

Synced just now

New...

New...

New...

PIP

PIP

PiP-P...

PIP-P...

Repair

Repai...

Repai...

Risk s...

risks

SP -...

SP-T...

Surv...

Surv...

New...

New...

New...

PiP-

PiP-

PiP-

PiP-

AM F

Grid

AM F

Risk

Risk

Start

Start

Surv

Surv

Take Survey

Risk Assessment Survey (v2.0.0)

Sign In Risks Asset Inspection

Details

Have you signed in? \*

Who signed you in?

Arrival Date and Time

BACK SAVE SAVE & NEXT

O2-UK 18:04 82%

< Vid

Take Survey

Repair Survey

Customer d... OPERATION FLUIDS & FI...

Account name

Swindon Building 5

Best contact number

0777999977

First line of address

97 Dulverton Avenue

BACK SAVE SAVE & NEXT

# Inside Dynamics 365 Customer Engagement

**Flexible** Execute Surveys off any D365 entity.

**Intuitive** Enable all centre users to be guided through a workflow/dialog.

**Efficient** Streamline processes to drive efficiency.

✓	Case Title	Case Number	Priority	Origin	Customer	Owner	Status Reason	Created On
	broken oven	CAS-01129-Y2F6S7	Normal	Phone	Swindon Council	Rahul Bharath	In Progress	29/10/2018 15:08
	No heating	CAS-01126-S6Z7L0	Normal	Portal	Swindon Council	SYSTEM	In Progress	26/10/2018 09:52
	No hot water	CAS-01125-S7L0X2	Normal	---	Swindon Council	Rahul Bharath	In Progress	26/10/2018 09:39
	boiler issue	CAS-01118-K1T1B3	Normal	Portal	Swindon Council	SYSTEM	In Progress	26/10/2018 08:46
	Boiler install	CAS-01117-S9M8K2	Normal	---	Swindon Council	Rahul Bharath	In Progress	26/10/2018 08:40
	Faulty boiler	CAS-01115-B2X4T2	Normal	Portal	Swindon Council	SYSTEM	In Progress	26/10/2018 02:43
	This is a fault	CAS-01114-V1S2W5	Normal	Portal	Swindon Council	SYSTEM	In Progress	26/10/2018 02:41
	New fault	CAS-01113-Q7Q7...	Normal	Portal	Swindon Council	SYSTEM	In Progress	26/10/2018 02:35
	Boiler rattling very noisily	CAS-01112-X0V3T7	Normal	Email	Swindon Council	Rahul Bharath	In Progress	26/10/2018 00:59
	Boiler making strange noises	CAS-01111-G4Y4G5	Normal	Email	Swindon Council	Rahul Bharath	In Progress	26/10/2018 00:52

1 - 52 of 52 (0 selected)

# Inside a Microsoft Portal or Standalone in an Azure Web App

## External

Enables Customers or external contacts to be guided through a survey template.

## Portal

Runs inside a Microsoft Portal, using an Azure Web App.

## Azure Web App

Can run standalone within an Azure Web App.

The screenshot displays a web browser window with the URL `9575/TakeSurvey/TakeSurvey?surveyId=b3d64b8c-0b6a-e811-a95d-000d3a82850e&name=All Question Template&templateId=ba3e0a93-5...`. The page features the eBECS logo in the top left and a search bar in the top right. Below the header, there is a toggle switch for 'Score Tracking OFF'. The main content area contains a form with the following fields:

- Salary:** A text input field containing '£5,000'.
- Skills:** A list of checkboxes with the following options: C#, ASP.NET, Dynamics 365, SAP, and Infor. The first four are checked.
- Employer:** A dropdown menu with 'Microsoft' selected, accompanied by a small Microsoft logo.
- Still working?:** A checkbox that is checked.

At the bottom of the form, there are three buttons: 'PREVIOUS', 'SAVE' (highlighted in green), and 'NEXT'.



# Child Surveys

Efficient

Combine multiple survey templates into one.

Parent/Child

Creates a Parent and Child relationship between the survey templates.

Streamline

Easily link surveys together to reduce the number of separate surveys.

Fordamper/fancoil type \*

Veksler Vand

Skriv 'fordamper' i feltet 'Enter starting letters'

Vælg Fordamper/Fancoil

1

Fordamper/fancoil

Skriv antallet af fordampere/fancoils

2

3

Tryk på 'refresh'

Order

Name

Status

3

Refresh

1

Fordamper/fancoil\_22/03/2019

In Progress

2

Fordamper/fancoil\_22/03/2019

4

Completed

3

Fordamper/fancoil\_22/03/2019

Scheduled

Vælg Fordamper/Fancoil

Fordamper/fancoil child survey

1

Fordamper/fancoil

2

Fordamper/fancoil

Fordamper/fancoil type

Veksler Vand

3

Ventil (vand)

Skal udskiftes/reparereres

Aktuator

Kontrolleret

Temperatur, vand frem (°C)

3.00

Temperatur, vand retur (°C)

3.00

Rumtemperatur

3.00

Fordamper/fancoil

3

Fordamper/fancoil

Fordamper/fancoil type

Veksler DX

March 11, 2020

# Survey Templates

# Survey Template

**Tabs** Create Tabs to define the survey screens.

**Sections** Multiple Sections can be created per Tab to group Questions.

**Questions** Multiple question types with configurable scoring and actions.

The screenshot displays the Dynamics 365 Intelligent Survey Survey Template interface. The browser address bar shows the URL: `ebecsfs.crm11.dynamics.com/main.aspx?appid=ce5b3464-e364-e911-a8c3-00224801a32d&pagetype=entityrecord&etn=ebecssvy_survey&id=ec6e6ef2-bcd0-e9...`. The page title is "Survey Template: Survey Design". The navigation pane on the left includes "Home", "Recent", "Pinned", "Site Assessment Survey V9", "Dashboard", "Conducted Survey", "Survey Template" (selected), "Survey Tab", "Survey Section", "Survey Question", "Designer Image", "Answer Master", and "Frames". The main content area is titled "Risk Assessment Survey" and features a "General" tab. The "General" tab includes a "Name" field (Risk Assessment Survey), "Decimal Separator" (Dot (.)), "Thousand Separator" (Comma (,)), "Show Signature On Survey" (checked), "Generate HTML5 Survey Report" (checked), "Generate Word Mail Merge Report" (unchecked), "Scoring" (checked), "Scoring Rule" (Sum of all answer values), "Do not allow retake" (checked), "Survey Status" (Draft), and "Parent survey". A "Save Survey" button is located in the top right corner. The bottom of the interface shows a "Survey" tab and an "Active" status indicator.

# Survey Actions

**Dynamic** Trigger actions whilst running the survey.

**Logic** Guide the survey down a process based on the answers to questions.

**Flexible** Various Action Types that can be leveraged.

The screenshot displays the 'Site Inspection Survey' interface. On the left, a sidebar lists various action types: Calculated, Capture Score, Checkbox, Currency, Date Time, Decimal, Display Image, Graphical List, Grid, Image Capture, and Integer. The main area shows a 'Customer detail' section with a 'PHYSICAL' tab and a list of items: 1. Over, 2. Fire, 3. Light, and 4. Steel. A 'Save Survey' button is in the top right corner. An 'ACTIONS' dialog box is open in the foreground, allowing configuration of an action. The dialog has the following fields: Name (set red), Related entity (Answer), Survey Answer (OK), Actions (Set Answer Color), and Answer Color (rgb(255,0,0)). A color picker is visible next to the Answer Color field, showing a red color selection with RGB values of 255, 0, 0 and a hex code of ff0000. The dialog includes 'Save', 'Save & Close', and 'Cancel' buttons at the bottom.

# Configurable Scoring

**Configurable** Create a Score per Answer to a Question.

**Weighted** Enable all centre users to be guided through a workflow/dialog.

**Efficient** Streamline processes to drive efficiency.

The screenshot displays the 'Site Inspection Survey' application interface. A modal dialog titled 'ANSERS' is open, allowing users to configure scoring for survey questions. The dialog includes a dropdown for 'Answer Master' (currently set to '-- select answer master --') and three buttons: 'Load Master Answers', 'Load Answers From Target', and 'Validate Answers'. Below these, a table lists four items with their respective scores and actions.

Value*	Order*	Score Value		
Working at hei	1	5	Delete	Actions
Hazardous Wa:	2	10	Delete	Actions
Asbestos	3	15	Delete	Actions
Exposed Electri	4	3	Delete	Actions

At the bottom of the dialog are four buttons: 'Add New Item', 'Save & Close', 'Save', and 'Cancel'. The background application shows a list of survey questions, including '1. Over', '2. Fire', '3. Light', '4. Steel', '5. Cou', and '6. What are the risks?'. A 'Save Survey' button is visible in the top right corner of the application window.

# Grids and Repeat Sections

**Editable Grids** Quickly and easily input data into a grid.

**Repeat Section** Duplicate sections with questions for easy data input.

**Record Creation** Automatically create new records off data inputted into the Grid.

The screenshot displays the Dynamics 365 Intelligent Survey interface. The left sidebar shows the navigation menu with options like Home, Recent, Pinned, Site Assessment Survey V9, Dashboard, Conducted Survey (selected), Survey Template, Survey Tab, Survey Section, Survey Question, Designer Image, Answer Master, and Frames. The main content area shows the 'CONDUCTED SURVEY' record for 'Asset checks'. The record details include:

- Account: Swindon Medical Devices
- Appointment: ---
- Name: Asset checks
- Date: 17/07/2019
- Creator: Alice Walton
- SurveyTemplate: Grid survey
- Work Order: WO00616
- Work Order Product: ---
- Contact: Alex Simmons
- Customer Asset: ---
- Bookable Resource Booking: ---
- Retake Not Allowed: ☐

The bottom status bar shows 'Survey' as 'Active' with a status of 'Active' and a reason of 'In Progress'. A 'Save' button is visible in the bottom right corner.



# Calculations

## Simple

Perform simple calculations between two or more Integer or Decimal fields.

## Quick

Calculations are triggered in real-time whilst running the survey.

## Easy


Make updates to the calculated formula easily.


The screenshot displays the Dynamics 365 Intelligent Survey configuration interface for a 'Site Inspection Survey'. The left-hand navigation pane includes options such as Home, Recent, Pinned, and various survey components like Dashboard, Conducted Survey, Survey Template, Survey Tab, Survey Section, Survey Question, Designer Image, Answer Master, and Frames. The main area is divided into 'General' and 'Related' tabs. Under the 'General' tab, there's a 'Machine Readings' section with a table containing three rows: '1. Baseline machine reading', '2. Machine Reading Min', and '3. Machine Reading Max'. Each row has a '1.0' value and an 'X' icon. To the right, there's a 'Details' section with fields for 'Question', 'Number Of Decimal Places', 'Symbol', and various checkboxes for 'Scoring', 'Mandatory when visible', 'Read Only Question', 'Disable Target Write Back', 'Show As Default', 'Enable Writing To Text Fields', and 'Disable Target Read'. At the bottom, there are 'Save' and 'Cancel' buttons.

# Lookup Data against the Conducted Survey Entity

Create Lookups to other entities in order to:

- Run a Survey from a particular entity in Dynamics 365 CE.
- Write or read data from a particular entity.
- Display data on the cover page of the Report produced.
- enforce Survey Allocation Rules based on an entity or its attributes.

Conducted Survey: New Form  
Compliance Checklist 00491

Owner  
 Tash Quinn

General

Notes

Related


Name

Compliance Checklist 00491


Date

08/02/2018


Creator

 Tash Quinn


Account

 Swindon Library


Contact

 Alex Simmons


Case

 Oven Issue

Customer Asset


 Beko Oven


Work Order


 WO00505


Quote

---

 Survey Template

 Compliance Checklist

 Parent Conducted

eBeCS  
A DXC Technology Company

Page 1 of 2

Date :8/2/2018 11:34:34 AM

Survey Name : **Compliance Checklist 00491**

Survey Final Score : **5250**

Account Details

Account Name	Swindon Library
Address 1	2 The Forum Swindon SN1 1QN United Kingdom
Address 1: Street 1	2
Address 1: City	Swindon
Address 1: ZIP/Postal Code	SN1 1QN
Address 1: Country/Region	United Kingdom

Customer Assets

Product	Beko Oven
Account	Site A - Swindon Library
Name	Oven



# Read and Write Survey Data back to Dynamics 365

## Read

Pull data into the survey as editable or read-only.

## Write

Update fields on records based on the data captured.

## Baseline

Perfect for baselining data where values previously captured are displayed.

The screenshot displays the 'Site Inspection Survey' configuration window. On the left, a list of question types is available: Calculated, Capture Score, Checkbox, Currency, Date Time, Decimal (selected), Display Image, Graphical List, Grid, Image Capture, Integer, Label, List, Lookup, Multi Checkbox, Multi Line Text, Section, Show subgrid, and Signature. The main area shows a preview of the 'Readings' tab, which contains a 'Machine Readings' section with a single entry: '1. Baseline machine reading' with a value of '1.0'. On the right, the 'General' settings are visible. The 'Question' field is 'Baseline machine reading', and the 'Number Of Decimal Places' is set to '2'. The 'Symbol' field is empty. Under the 'Scoring' section, 'Show As Default' is checked. The 'Target Entity' is set to 'Customer Asset', the 'Target Attribute' is 'Baseline Machine Reading', and the 'Target Related Lookups' is 'ebecs\_customerasset'. The 'Answers' section is empty. A red box highlights the 'Target Entity', 'Target Attribute', and 'Target Related Lookups' fields. The 'Save Survey' button is at the top right, and 'Save' and 'Cancel' buttons are at the bottom right.

# Baseline Survey - Example

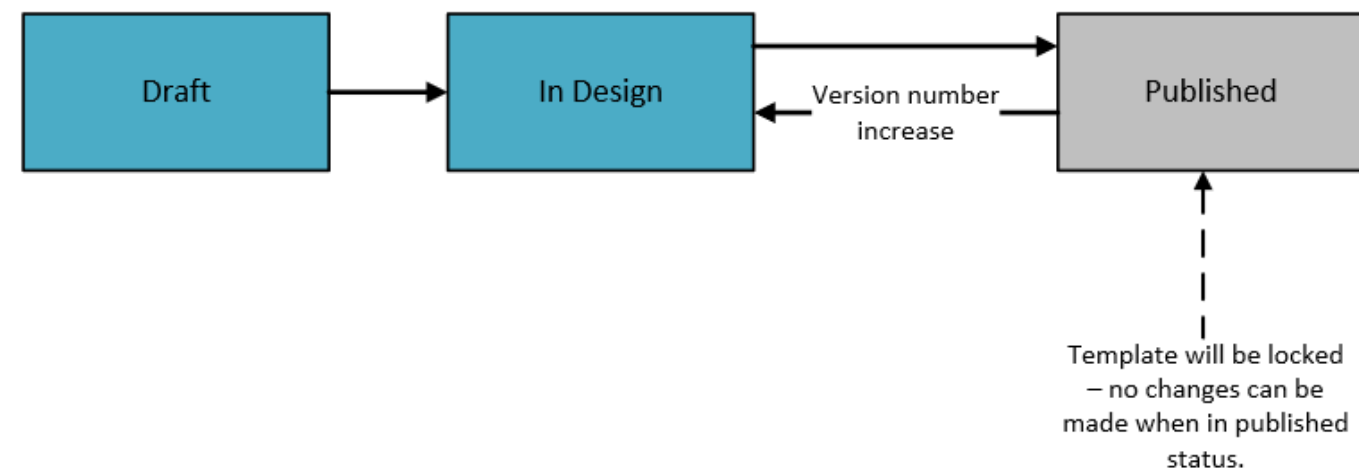
The screenshot displays the Dynamics 365 Field Service interface for a baseline survey. The main content area is divided into three sections:

- Operating Hours:**
  - Start Time: 01:00
  - End Time: 02:00
  - Days: Monday, Tuesday
- Baseline:**
  - Baseline Temperature: 25.00
  - Baseline Pressure Reading: 44.00
- Last Readings:**
  - Temp Reading Min: ---
  - Pressure Test Min: ---
  - Temp Reading Max: ---
  - Pressure Test Max: ---

The right-hand pane shows the 'Conducted Surveys' list and the details for a specific survey:

- Conducted Surveys:**
  - 26th sept checks (Compliance Checklist)
  - Apartment C compliance check (Compliance Checklist)
  - Baseline Check - Boiler (Baseline Results)
  - Baseline Results (Baseline Results)
  - Baseline Results - Test (Baseline Results)
  - Compliance checks 26th Septer (Compliance Checklist)
  - Compliance Checks for Apartm (Compliance Checklist)
  - Compliance checks for Apartm (Compliance Checklist)
  - compliance crm check (Compliance Checklist)
  - test (Compliance Checklist)
- Conducted Survey Details:**
  - Name: Baseline Contoso Hospital
  - SurveyTemplate: [Baseline Results](#)
  - Account: [Contoso Hospital](#)
  - Customer Asset: [X12 MRI Machine](#)
  - Work Order: [Click To Select](#)
  - Case: [Click To Select](#)
  - Creator: [Click To Select](#)
  - Date: 26/09/2018

# Versioning and Auditing



## Control

Lock down changes to Published Templates.

## Tracking

Track changes to Survey Template versions.

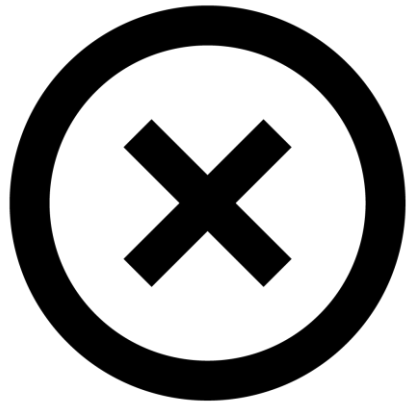
## Revisions

Revise Major and Minor options available for revising Survey Templates.

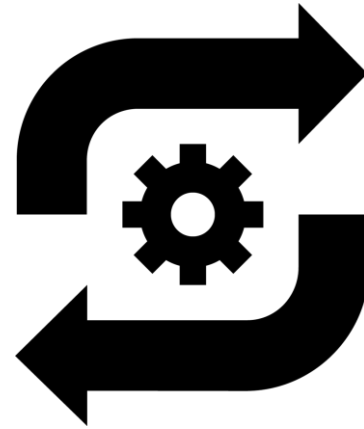
**Versioning and Auditing feature**

Field	Value
Name	Versioning and Auditing feature
Owner	Tash Quinn
Show Signature On Survey	<input type="checkbox"/>
Generate HTML5 Survey Report	<input type="checkbox"/>
Generate Word Mail Merge Report	<input checked="" type="checkbox"/>
Scoring	<input type="checkbox"/>
Decimal Separator	Dot (.)
Thousand Separator	Comma (,)
Status Reason	Draft
Parent Template	Versioning and Auditing (v1.0.1)
Do not allow retake	<input type="checkbox"/>

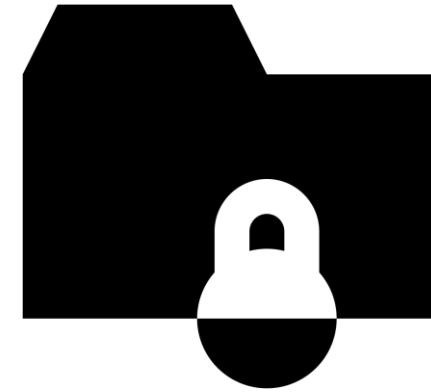
# Intelligent Survey Migration Tool



Removes the process of manually re-creating Survey Templates in multiple environments



Perfect for moving surveys from Dev, to UAT and Production Environments



All Survey data is pulled across and linked to the relevant Parent Survey Template.

# Survey Allocation Rules




# Survey Allocation Rules

**Automated** Automatically generate surveys when new records are created.

**Rules** Allocate surveys based on queries per Survey Template.

**Flexible** Survey allocations and the rules are easy to update.

 WORK ORDER  
WO00507

Work Order Business Pro...  
Active for 45 minutes

Summary Financial Summary

+ Add New Conducted ...

Compliance Checklist for all work orders

General Related

Build Query Get Query

Rule Fetch Xml

<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">  
<entity name="msdyn\_workorder">  
<attribute name="msdyn\_name" />  
<attribute name="msdyn\_serviceaccount" />  
</entity>  
</fetch>

Rule Trigger On

bookableresourcebooking

Primary Entity

msdyn\_workorder

Owner

Tash Quinn

Conducted Survey Associated View

✓

Creator

↑

↓

Date

↑↓

↓

Enable Auto Em...

↑↓

↓

Final Score

↑↓

Number Of Revi...

↑↓

○ Alice Walton

25/03/2019

No

---

---

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

1 - 1 of 1 (0 selected)

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# Reporting



# Completed Survey Records and HTML5 Report

## Audit

View all survey answers, signatures and images in Dynamics 365.

## Traceable

Provides full traceability of the survey to be provided to the customer.

## Automated

Automatically generates a PDF of the completed survey.

Repair for AM Machine

General

Notes

Related

Survey

Final Score

5.00

Enable Auto Emails

No

Responses

+ Add New Responses

...

✓

Name

↓

Created On

↕

Survey Question

High

25/03/2019 18:52

What is the level of risk?

Hazardous Waste,Exposed Electric Cables

25/03/2019 18:52

What are the risks?

Follow up survey to be arranged

25/03/2019 18:52

Are there any comments to add abo...

Alex Simmons

25/03/2019 18:52

Who signed you into site?

9 - 12 of 19 (0 selected)

⏪

⏩

Page 3

⏴

⏵

Date Completed

25/03/2019

📅

18:46

🕒

Number Of Reviews

0

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Sign in

Sign In Section

Have you signed in?

true

Arrival Time

3/25/2019 11:00 AM

Is it safe to get to the work area?

True

Who signed you into site?

Alex Simmons

Repair Checks

Safety Checks

Does the site meet our safety requirements?

true

What is the level of risk?

High

What are the risks?

Hazardous Waste,Exposed Electric Cables

Repair Details

Asset Details


Asset In Warranty?

true

Which part is broken?

Intercooler

Photo of broken part



Machine Readings

Baseline Machine Reading

194.00


Machine Reading Min

91.00

Machine Reading Max

170.00

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# Reporting off Custom Entity using Mail Merge

## Flexible

Easily build survey reports and interrogate survey responses.

## Traceable

Generates tables in the CDS to mirror the questions in the survey template.

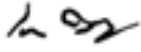


## Automated

Automatically generates a PDF of the completed survey.

Site Inspection for 6 Day Loans

Created By: Christa Geller  
Completed On: 7/4/2019 9:08 AM  
Number of Reviews: 0  
Pre-start Inspection Details  
Currently Certified: True  
Last Know Inspection Date: 1/1/2019 11:30 AM  
Inspection Date: 7/4/2019 2:00 PM

Inspection Details

Area	Items Inspected	Immediate Remedial work?	Detailed Comments	Next Inspection Date	Signature
Zone A	Floor; Roof Cavity; Cabling; Electrics	True	Need to bring upto standards	10/1/2019 9:00 AM	
Zone B	Floor; Walls; Roof Cavity	False	All good	3/1/2020 9:05 AM	
Zone D	Walls; Roof Cavity; Cabling; Electrics	True	Missing safety cut-offs.	9/1/2019 11:00 AM	

# Emailing a Completed Survey

The Completed Survey PDF can be automatically emailed upon completion to various email recipients, e.g. the Primary Contact at the Billing Account.

New

Deactivate

Delete

Refresh

Assign

Share

Email a Link

Flow

Word Templates

Run Report

Survey Settings: Survey Settings (Beta)

Send Auto Email when work order i...

General

Related

Name

\*

Send Auto Email when work order is completed

🔒 Type

\*

Enable Auto Send

Email Template

\*

Conducted Survey Email Tei

Send From User

Alice Walton

🔒 Send From Queue

---

Entities

\*

Work Order

Trigger Field

\*


System Status

Build Query

Get Query

🔒 Auto Send Criteria

```
<fetch version="1.0" output-format="xml-  
platform" mapping="logical" distinct="false">  
<entity name="msdyn_workorder"><attribute  
name="msdyn_name"/><attribute  
name="createdon"/><attribute  
name="msdyn_serviceaccount"/><attribute  
name="msdyn_workorderid"/><order  
attribute="msdyn_name" descending="false"/>  
<filter type="and"><condition  
attribute="msdyn_systemstatus" operator="eq"  
value="690970003"/></filter></entity></fetch>
```

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