

Surveys for Jira

Cprime Apps

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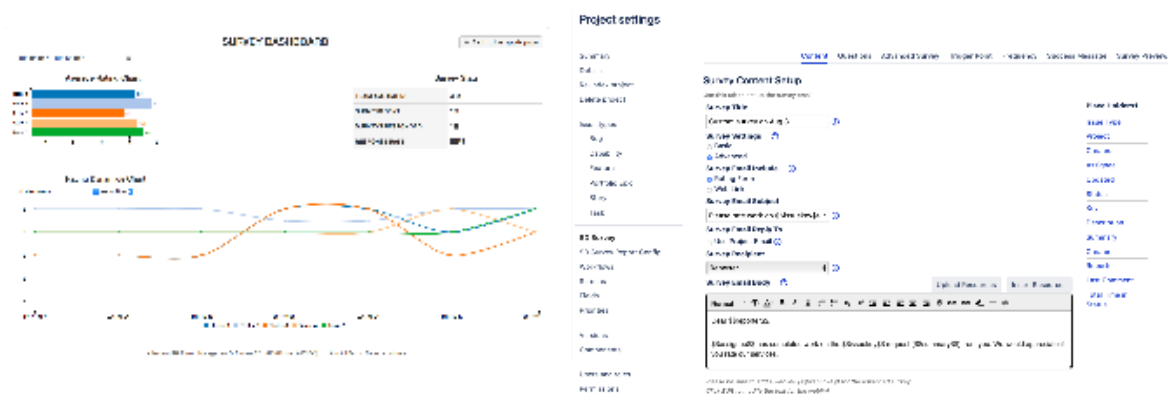
1 Surveys for Jira

Send, aggregate and analyze survey data, based on the quality of the support received by customers. You can customize, brand your surveys, manage permissions, add automation based on survey results and more. The app works for Jira Software and Jira Service Desk thus enabling you to leverage both internal surveys for company employees and external ones for your customers.

1.1 Key features

- **Configurability** – Surveys for Jira is the most versatile survey app on the market - personalize, brand your surveys, define any custom questions, trigger points, use stars or numbers in your rating, apply filters, use CSS to brand your surveys, etc.
- **Quick** – get ready in seconds with 1-click survey that has all data pre-populated
- **Freedom** – Set up survey rules for automatic surveys or trigger surveys manually at any time
- **Permissions** – define the level of access to survey feedback
- **Report** – view main stats on a survey dashboard, measure average rating and rating dynamics, drill down to detailed survey results in an exportable report
- **Take action** – take your surveys to the next level with [SIL scripting¹](#) and add any automation you need based on survey results - assign, transition, create tickets, add automatic comments and more!

1.2 Gallery



¹ <https://confluence.cprime.io/pages/viewpage.action?pageId=6560282>

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Please visit our [Service Desk](https://jira.cprime.io/servicedesk/customer/portal/2)⁴ to request support, report a bug, or suggest a feature

Be sure to visit our [Welcome](https://confluence.cprime.io/display/CADS/Welcome)⁵ page to get more information about other contact methods and hours of availability, SLAs, EULA and more.

² <https://www.cprime.com/>

³ <mailto:products@cprime.com>

⁴ <https://jira.cprime.io/servicedesk/customer/portal/2>

⁵ <https://confluence.cprime.io/display/CADS/Welcome>

2 SP - What's new

Pages in this section provide details on the major releases for the Survey for Jira:

- [SP 3.0](#)(see page 8)
- [SP 3.1.0](#)(see page 11)

2.1 SP 3.0

Starting with Surveys for Jira 3.0, we have introduced the following new features, enhancements, and bug fixes.

- [Survey dashboard](#)(see page 8)
- [Easier survey creation](#)(see page 9)
 - [One click survey](#)(see page 9)
 - [Easier creation of the basic survey](#)(see page 9)
- [Force survey sending](#)(see page 9)
- [More features and enhancements](#)(see page 10)
 - [Notifications](#)(see page 10)
 - [Compatibility updates](#)(see page 10)
 - [Other enhancements](#)(see page 10)

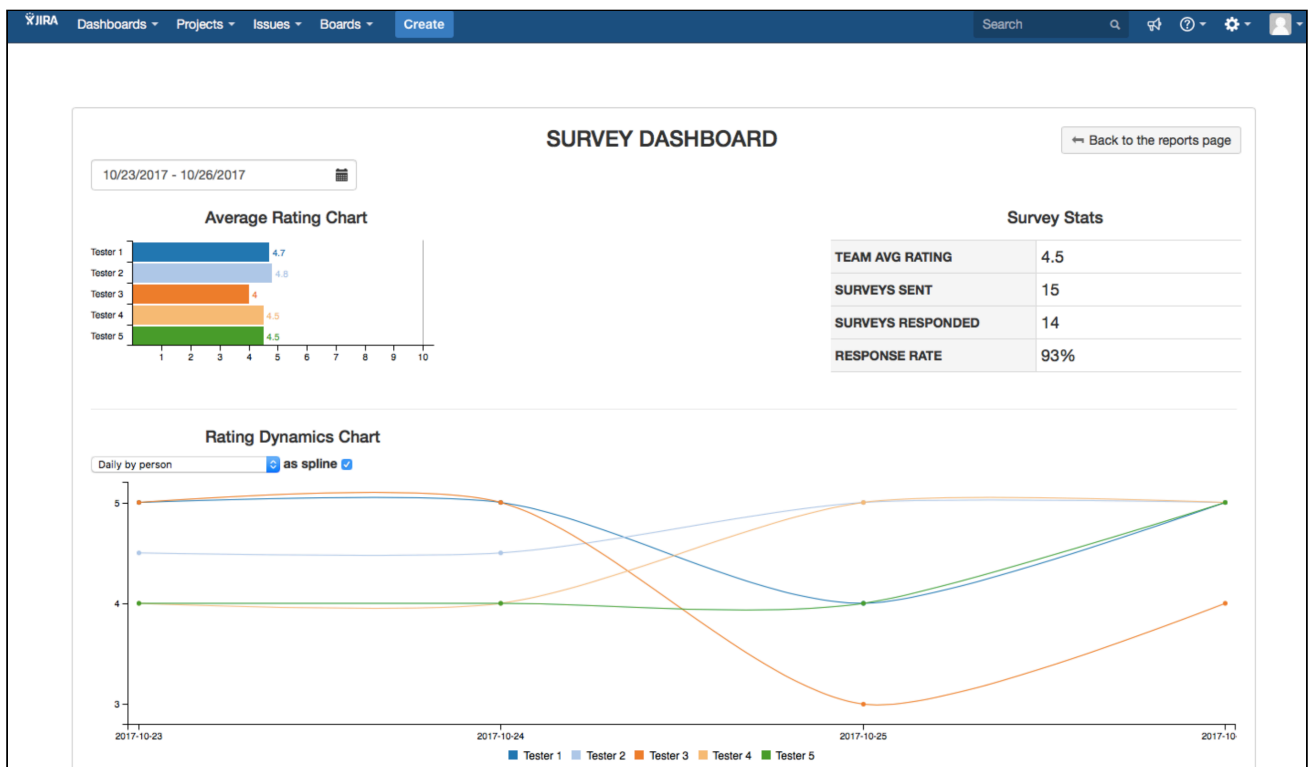


Documentation for older versions of Surveys for Jira is available [here](#)⁶.

2.1.1 Survey dashboard

Nor you can view survey data not only in a detailed tabular view of our survey reports but also as a Survey Dashboard. It provides the main metrics as well as visual reports to give you instant insights into the support team's quality.

⁶ <https://confluence.cprime.io/download/attachments/12855924/sp%20-%20force%20send%20survey.png?api=v2&modificationDate=1509108285298&version=1>



2.1.2 Easier survey creation

2.1.2.1 One click survey

Creating a survey for your project has never been easier. Just one click, zero time wasted - and you have a standard survey ready with the necessary fields already pre-populated.

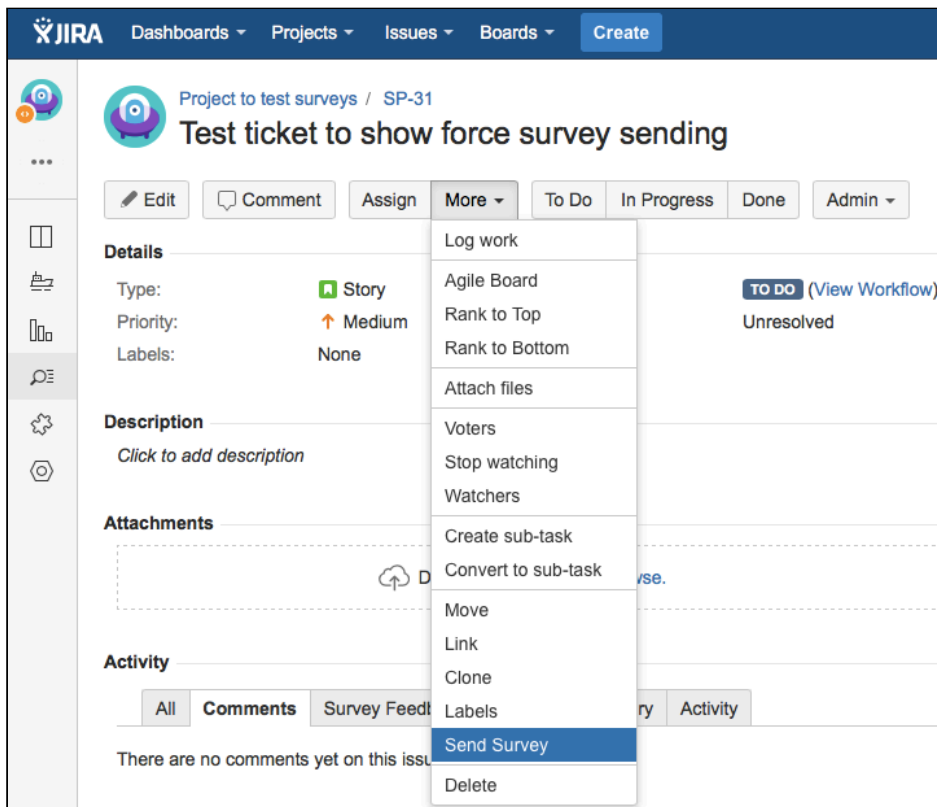
2.1.2.2 Easier creation of the basic survey

To save you time, we have also improved how the basic survey is created:

- standard survey works with stars on a 5 star rating scale
- Permissions are set automatically – the reporter will be asked to comment and survey feedback will be added to the ticket and survey report
- Trigger point and frequency will be pre-populated automatically. You can still change them but we applied the most used settings to save you more time

2.1.3 Force survey sending

You can customize your surveys in any way you want, and they will be sent out based on the trigger points and frequency that you define. But in addition to that you can now force send surveys without changing the general rule for your surveys.



2.1.4 More features and enhancements

2.1.4.1 Notifications

We notify the assignee when the survey has been filled out on the ticket that the assignee resolved / was working on.


2.1.4.2 Compatibility updates

We monitor releases of Atlassian applications and release the compatibility updates soon after Atlassian releases a new version of the application, this release is no exception, and we're happy to offer you surveys that you can use on your latest Jira Service Desk.

2.1.4.3 Other enhancements

- Functionality of the Questions tab is improved
- All tabs: better UX/UI for the survey configuration
- Tooltips and warnings improved
- Placeholders for the custom survey are added automatically

2.2 SP 3.1.0

 Important note! Before you upgrade to v3.1.0, ensure that you have saved the JQL queries that you use for your survey trigger points.

In v3.1.0 of the Surveys for Jira we have implemented the following features and bug fixes.

New Features

- Added the ability to use the project email as a reply to email for the surveys. If this setting is enabled, your survey emails will also contain a reply-to address which is an email from your project notification scheme.
- Added the possibility to send surveys **only once per ticket**(see [page 0](#)) to avoid too many emails sent to clients in case the ticket gets reopened and resolved again.
- In addition to the ticket status change, we added the ability to listen to any events in the ticket and use them as survey trigger points.

Enhancements

- Now you can add a custom field (both Jira and any global single select FC) to be displayed in the following survey reports: **Average Rating**, **Custom Question Report**, and **Date Report on User Usage**.
- When you reset survey data, the data from the **Custom Question** report is also deleted. Additionally, you have a confirmation dialogue now to protect you from data loss in case you change your mind or clicked the **Reset** button by mistake.
- We have added a rating to the **Custom Question** report so that you can see overall customer satisfaction at glance using both the rating and the answers to the custom survey questions.
- Now when you use a placeholder for the reporter, their name (**Natalie, Max...**) appears, not the login (**ndoe, max.lastname@company.com⁷...**) which greatly improves the readability and user friendliness of your emails.

Bug Fixes

- We fixed a bug on the **Frequency** tab so that you can use custom fields when setting up your survey frequency.
- We have also fixed a bug in the JQL series. Now the JQL queries will always work when selected for the survey trigger point.
- Fixed a bug with the custom recipient for the advanced survey configurations. Now you can select a custom recipient from a list of custom user picker fields configured in your Jira instance.
- We have verified compatibility with the latest Jira version.

⁷ <mailto:max.lastname@company.com>

3 SP - Getting Started

Welcome and thank you for downloading our plugin!

Or if you haven't downloaded it yet but are curious to check out what it entails - welcome to you as well!

First things first, when you install the plugin you will notice that nothing will appear in your JIRA toolbar at the top. Or, if you're a user of an older version of the plugin you will still see the **SD SURVEY** section in your toolbar.

Our survey plugin is designed to be visible to Administrators only and will only be enabled for projects that have been selected under the **Add-ons** section in the **Administration**. So, ensure that your user has Admin permissions.

3.1 See also

- [SP - Glossary](#)(see page 12)

3.2 SP - Glossary

3.2.1 Basic Survey

Basic Survey — simple default survey utilizing cPrime's default template with a 5-star rating system.

It only requires the following fields from users:

- Name of survey
- Header content
- Footer content
- Trigger point
- Thank you message

3.2.2 Custom Survey

Custom Survey — Survey that replaces the default survey content (boxed in yellow) with a custom external survey that is created in our WYSIWYG editor.

3.2.3 Placeholder fields

Placeholder Fields — Allow users to input placeholders within the body of the survey content, which will auto-populate based on the specific issue that triggered the survey.

For example, if a user inputs the 'reporter' placeholder in the header content, the recipient will see their own name / username).

3.2.4 Weblink

Weblink — Placeholder field available for the custom survey and inserts a URL that will redirect the recipient to the custom created external survey.

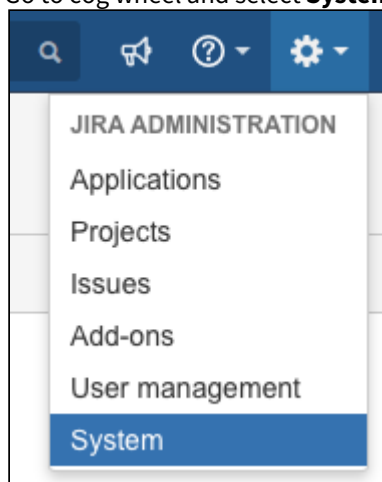
4 SP - Configuring Surveys for Jira

This section provides information on how to install and configure Surveys for Jira:

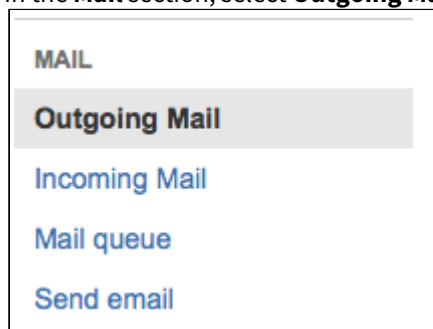
- [Enabling and configuring Jira outgoing emails](#)(see page 13)
- [Selecting projects for surveys](#)(see page 13)
- [To view Survey Feedback tab in the ticket](#)(see page 13)
- [Survey report configuration](#)(see page 13)

4.1 Enabling and configuring Jira outgoing emails

1. Log into your JIRA instance as Admin.
2. Go to cog wheel and select **System**.



3. In the **Mail** section, select **Outgoing Mail**.



4. Click **Configure New SMTP Mail Server**.
5. Fill out the fields. For more information, see Atlassian documentation on [configuring JIRA's SMTP mail server t send notifications](https://confluence.atlassian.com/adminjiraserver071/configuring-jira-s-smtp-mail-server-to-send-notifications-802592930.html)⁸.
As a result, you should have something like this.

⁸ <https://confluence.atlassian.com/adminjiraserver071/configuring-jira-s-smtp-mail-server-to-send-notifications-802592930.html>

Add SMTP Mail Server ?

Use this page to add a new SMTP mail server. This server will be used to send all outgoing mail from JIRA.

Name *
The name of this server within JIRA.

Description

From address *
The default address this server will use to send emails from.

Email prefix *
This prefix will be prepended to all outgoing email subjects.

Server Details
Enter *either* the host name of your SMTP server *or* the JNDI location of a javax.mail.Session object to use.

SMTP Host

Service Provider

Timeout
Timeout in milliseconds - 0 or negative values indicate infinite timeout. Leave blank for default (10000 ms).

Username
Optional - if you use authenticated SMTP to send email, enter your username.

Password
Optional - as above, enter your password if you use authenticated SMTP.

or

JNDI Location

JNDI Location
The JNDI location of a javax.mail.Session object, which has already been set up in JIRA's application server.

6. Click **Test Connection** and fix values in the fields if needed.
7. Click **Add**.

4.2 Selecting projects for surveys

- ✓ To quickly see which surveys you currently have enabled, go to **Administration > Add-ons** and select **Configuration** in the **SD SURVEY** section.

List of enabled surveys Project to test surveys (SP) Surveys for Service Desk

Start with adding projects you'd like the survey to be enabled for. To do this:

1. Log into your Jira instance as Admin.
2. Go to cog wheel and select **Add-ons**.
3. In the **SD SURVEY** section, select **Configuration**.
4. Specify the projects for which you would like to set up surveys. You can also opt to enable the survey for all projects.

The screenshot shows the Jira Administration interface. At the top, there are navigation tabs for Dashboards, Projects, Issues, Boards, and a Create button. Below this is the Administration header with a search bar. The main navigation bar includes Applications, Projects, Issues, Add-ons (selected), User management, and System. The left sidebar contains various configuration sections: ATlassian Marketplace, Global SSO, Lastlog-add-on, Safe Feature, and SD Survey. The main content area is titled 'Survey plugin configuration' and includes options to enable the survey plugin for all projects (set to No), select projects, enable a 'Survey Feedback' tab, and a list of enabled surveys. A dropdown menu is open for 'Select Projects', displaying a list of projects: Feature, KYProd, Products grand plan 2017, Test, Test project (highlighted), Test2, test3, and test4.

5. Click **Submit**.

4.3 To view Survey Feedback tab in the ticket

1. You have to belong to the **administrators** role in Jira.
2. Log into your JIRA instance as Admin.
3. Go to cog wheel and select **Add-ons**.
4. In the **SD SURVEY** section, select **Configuration**.
5. Select the necessary project in the **Enable Survey plugin for Projects** and **Enable "Survey feedback" tab for projects** fields.

6. Click **Submit**.

4.4 Survey report configuration

Use Survey Report Configuration page to define settings for survey reports. Report settings are applied to the reports inside one project and do not affect report settings of the surveys in other projects.

Action	Description
Visible for Project Administrator only	Limits survey report visibility to the administrators role only.
Select custom report field	Here you can choose any additional custom field to be shown in the Average Rating report.
Include Issue Type	Select this checkbox to show issue types in the Average Rating report as an additional column.
Select custom priority field	If you are using a custom field for the ticket priority and not Jira a native Priority field, select the appropriate value here. It will be shown in the survey reports. Leave this field empty if you are using default Jira Priority field.
Reset All Report Data	Clears all survey metrics for the sent / received surveys. This is useful when you want to stop tracking rating progress on your older surveys and start anew.

4.4.1 What's next

After you have installed and configured your Surveys for Jira, go give it a try! You can start by [creating a default survey](#)(see page 18) or choose to [create a custom survey](#)(see page 27) as well.

4.4.2 See Also

[FAQ section for Surveys for Jira](#)(see page 43)

5 SP - Using Surveys for Jira

In this section, you can find information about the following subjects:

- [SP - Creating basic survey](#)(see page 18)
- [SP - Creating a Custom Survey](#)(see page 27)
- [SP - Activating a Survey](#)(see page 39)
- [SP - Results Reporting](#)(see page 39)

5.1 SP - Creating basic survey

You can create a basic survey [with just one click](#)(see page 18) with everything preconfigured or create a basic survey in a [regular way](#)(see page 18).

5.1.1 Prerequisites

- Ensure that your user has Admin permissions in JIRA
- Ensure that you have Surveys for Jira [installed and configured](#)(see page 13)
- Ensure that you have at least [one project selected](#)(see page 14) for the surveys

5.1.2 Creating a one click survey

One click survey is the quickest way to get started with your surveys while using the most standard settings. It is a basic survey with all fields filled in. after you create it, the only thing left is to [activate](#)(see page 39) it.

5.1.3 Creating a basic survey

1. Log into your Jira instance as Admin.
2. Go to cog wheel and select **Projects**.
3. Click the project that you have enabled the surveys for.
4. On the left panel, click **SD Survey**, which brings up the **All Surveys** page:

Project settings						
All Surveys						
Survey Title	Trigger Point	Created On	Created By	Actions	Status	
Basic Survey	Done	April 1, 2019	admin	Edit Delete	<input type="radio"/>	<input type="checkbox"/>
Custom survey on Aug 3	Done	August 3, 2018	admin	Edit Delete	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>
Basic Survey	Done	October 30, 2017	admin	Edit Delete	<input type="radio"/>	<input type="checkbox"/>
Surveys for Service Desk	Done	October 11, 2017	admin	Edit Delete	<input type="radio"/>	<input type="checkbox"/>

5. Click **Add New Survey**.

The basic survey is created with the most standard settings applied automatically. However, you can modify the survey settings (change the trigger rules, modify the survey wording, and so on) in the wizard that opens.

✓ When you click **Add New Survey**, the basic survey gets created but it's not activated so that your current active survey doesn't get interrupted. When you set up everything for a new survey, go to the list of surveys and activate the necessary survey in the **Status** column.

6. Click **Finish**.


5.1.4 Survey tabs

- [Survey Content](#)(see page 18)
- [Trigger Point](#)(see page 18)
- [Frequency](#)(see page 18)
- [Success Message](#)(see page 18)
- [Survey Preview](#)(see page 0)

5.1.4.1 Survey Content

Survey Content tab is used for specifying details on how a survey email should look like and which content it will have.

The screenshot shows the 'Project settings' interface for a survey. On the left is a sidebar with navigation options like Summary, Details, Issue types, and SD Survey. The main area is titled 'Survey Content Setup' and includes tabs for Content, Trigger Point, Frequency, Success Message, and Survey Preview. The 'Content' tab is active, showing fields for Survey Title (Custom survey on Aug 3), Survey Settings (Basic selected), Survey Email Include (Rating Form selected), Survey Email Subject (Please rate our services), and Survey Email Reply To (Use Project Email). The Survey Email Body field contains a rich text editor with the text: 'Dear \$\$reporter\$\$, \$\$assignee\$\$ has completed work on the \$\$issuekey\$\$ request (\$\$summary\$\$) from you. We would appreciate if you rate our services.' Below this is the Email Footer field with the text: 'We take your feedback seriously, and it will help us improve our services in the future. Thank you!'. A 'Save' button is at the bottom.

Field	Description
Survey Title	Think up a name for your survey. This is an internal name to help you differentiate between your surveys.
Survey Settings	<p>When you add a new survey, a basic survey with the most standard settings is created. The "Basic" option is used to utilize the default 5-star rating form.</p> <div style="border: 1px solid #f0e68c; padding: 10px; margin-top: 10px;"> <p> If you select "Advanced" in the Survey Settings field, you can create a custom survey but this will no longer be a basic survey. To read about how to configure custom surveys, see SP - Creating a Custom Survey(see page 27).</p> </div>
Survey Email Include	You can customize your survey emails to include either a survey rating scale or to display a link to your survey form.
Survey Email Subject	Enter an email subject that you want your end users to see in the survey email.
Survey Email Reply To	By default, the surveys are sent from Jira service account, and people cannot reply to the survey emails. You can opt to select the email from the project settings as a reply-to email for the surveys.
Survey Email Body	<p>Here you can design a body of your survey that the end user will receive. As you design the header and footer, you can use the placeholder JIRA fields in order to automate your email template. The placeholder values wrapped by "\$\$" signs will be populated by the information submitted in the ticket that triggers the survey.</p> <p>You can make your survey stand out by designing it in line with your company brand. Use Upload Resources and Insert Resources buttons to use your visual assets.</p>
Email Footer	Use the Footer field to provide a nice finish to your survey email.

5.1.4.2 Trigger Point

On the **Trigger Point** tab, you can specify a condition that should trigger the email survey. This could be a change in the ticket status or a more complex JQL query.

Status change

By default, the "Done" status is set as trigger point, so whenever such issues reach the "Done" stage, an email survey is sent to the reporter - pending the survey [frequency](#)(see page 20) which you set in the next step.

Project settings

Content
Questions
Advanced Survey
Trigger Point
Frequency
Success Message
Survey Preview

Summary

Details

Re-index project

Delete project

Issue types

- Bug
- Capability
- Feature
- Portfolio Epic
- Story
- Task

SD Survey

SD Survey Report Config

Workflows

Screens

Fields

Priorities

Versions

Components

Users and roles

Trigger Point

Use this tab to define whether to send survey for all tickets meeting trigger point conditions or only certain ones.

Trigger Type: Status change JQL match [?](#)

Task : Done ⌵

Story : Done ⌵

Bug : Done ⌵

Epic : Done ⌵

Capability : Select Status ⌵

Portfolio Epic : Select Status ⌵

Trigger a SIL script when survey is sent [?](#)

Type to search for files 🔍

- 📁 silJql_ClosedParentOpenSubtasksByProject.sil
- 📁 silJql_CommentedProjectAfterDate.sil
- 📁 silJql_CommentedProjectTimeAgoByUser.sil
- 📁 silJql_FieldValueDoesntMatchEpic.sil
- 📁 silJql_IssuesWithSubtasks.sil
- 📁 silJql_LinkedIssuesByType.sil
- 📁 addComment.sil

Trigger a SIL script when survey feedback received [?](#)

Previous
Save

JQL query

Alternatively, you can create a custom JQL query to serve as a trigger point or select a filter among the available saved filters.

Project settings

Summary

Details

Re-index project

Delete project

Issue types

- Bug
- Capability
- Feature
- Portfolio Epic
- Story
- Task

SD Survey

SD Survey Report Config

Workflows

Screens

Fields

Priorities

Versions

Components

Users and roles

Content
Questions
Advanced Survey
Trigger Point
Frequency
Success Message
Survey Preview

Trigger Point

Use this tab to define whether to send survey for all tickets meeting trigger point conditions or only certain ones.

Trigger Type: Status change JQL match ?

Saved filter Due this week (TEST) ?

Filter preview

project = 10100 and duedate >= startOfWeek() and duedate <= endOfWeek() ORDER BY priority desc

?

Send survey once per issue ?

Check every issue change ?

Trigger a SIL script when survey is sent ?

Type to search for files Q

- silJql_ClosedParentOpenSubtasksByProject.sil
- silJql_CommentedProjectAfterDate.sil
- silJql_CommentedProjectTimeAgoByUser.sil
- silJql_FieldValueDoesntMatchEpic.sil
- silJql_IssuesWithSubtasks.sil
- silJql_LinkedIssuesByType.sil
- addComment.sil

Trigger a SIL script when survey feedback received ?

Previous
Save

Integration with SIL

Starting with v3.2.3 for Jira 7 and v3.3.3 for Jira8, we have added the possibility for you to add automation and trigger other actions once the survey is sent or survey feedback is received. For instance, you can have an automatic comment posted in the ticket indicating that the survey was sent (as on the picture below) or change assignee, create another ticket, and so on. Now the endless possibilities of SIL⁹ are brought into Surveys for Jira.

⁹ <https://confluence.cprime.io/pages/viewpage.action?pageId=6560282>

Trigger a SIL script when survey is sent [?](#)

Select a folder to search [Q](#)

- silprograms
 - examples
 - addComment.sil
 - Re-index my first two projects

Trigger a SIL script when survey feedback received [?](#)

Type to search for files [Q](#)

- silprograms
 - examples
 - !Examples-ModsRequired
 - Custom_Field_Scripts
 - Event_Listeners
 - Functions
 - Schedulers_Interval-Cron

5.1.4.3 Frequency

Use this tab to specify the frequency at which the survey will be sent out based on the issues' level of importance.

By default, the app draws on the **Priority** field. So for instance if you set the frequency to 100% for the Blocker tickets and 10% for Normal ones – every reporter who submitted a Blocker ticket will receive a survey if it hits the trigger point and only 10% of reporters who submitted a Normal ticket will receive a survey pending ticket status.

Project settings

Summary
Details
Re-index project
Delete project

Issue types
Bug
Capability
Feature
Portfolio Epic
Story
Task

SD Survey
SD Survey Report Config
Workflows
Screens

Content Questions Advanced Survey Trigger Point **Frequency** Success Message Survey Preview

Mail Frequency

You can further filter the surveys sent based on the values in the certain fields. For example, you can ask for feedback for every major bug but for the minor ones - send surveys for only 10% of those.

Send surveys for all tickets
 Filter surveys by

Select Field: **Priority**

Highest	100	%
High	100	%
Medium	50	%
Low	10	%
Lowest	10	%

Previous Save

Alternatively, you can send surveys for only part of the tickets in your project, for instance, if you select the 100% for the Product 1, as in the screenshot, you will only survey people who submitted tickets for the products 1 and users of other products will not be affected.

Project settings

Summary
Details
Re-index project
Delete project

Issue types
Bug
Capability
Feature
Portfolio Epic
Story
Task

SD Survey
SD Survey Report Config

Content Questions Advanced Survey Trigger Point **Frequency** Success Message Survey Preview

Mail Frequency

You can further filter the surveys sent based on the values in the certain fields. For example, you can ask for feedback for every major bug but for the minor ones - send surveys for only 10% of those.

Send surveys for all tickets
 Filter surveys by

Select Field: **Product**

Product 1	100	%
Product 2	0	%

Previous Save

5.1.4.4 Success Message

Use a **Success Message** field to specify what the Reporter will see after they've submitted the survey. Alternatively, you can select not to notify a user.

Service Desk URL — if for some reason, a user opens the survey which has already expired, they can be redirected to your Service Desk portal or any other URL that you specify in this field.

Project settings

Summary

Details

Re-index project

Delete project

Issue types

- Bug
- Capability
- Feature
- Portfolio Epic
- Story
- Task

SD Survey

SD Survey Report Config

Content
Questions
Advanced Survey
Trigger Point
Frequency
Success Message
Survey Preview

Success Message

Specify the message to be shown to the user after submitting the survey

Success Message

Service Desk Home URL

Specify a redirect URL for people who opened expired surveys

Service Desk URL ?

Previous
Save

5.1.4.5 Survey Preview

Use the preview tab to see at what your survey email and survey form will look like. This tab is very handy to make quick sanity checks before you click the **Finish** button.

The placeholder values wrapped by "\$\$" signs will be replaced with the content from the Jira ticket that triggers the survey.

Email Preview

Here's what your survey will look like to end users.

Dear \$\$reporter\$\$,

\$\$assignee\$\$ has completed work on the \$\$issuekey\$\$ request (\$\$summary\$\$) from you. We would appreciate if you rate our services.

\$\$weblink\$\$

We take your feedback seriously, and it will help us improve our services in the future.

Thank you!

Survey Preview

Dear \$\$reporter\$\$,
We'll appreciate if you give us your honest opinion:



Comment :

how would you rate our services?

- Poor
- Average
- As expected
- Good job guys!

What can we do to make them even better?

Would you recommend us to your colleague / friend?

- Yep
- Probably
- Not sure
- No

Submit

5.1.5 What's next?

[Activating a Survey](#)(see page 39)

5.1.6 See Also

[Creating a Custom Survey](#)(see page 26)

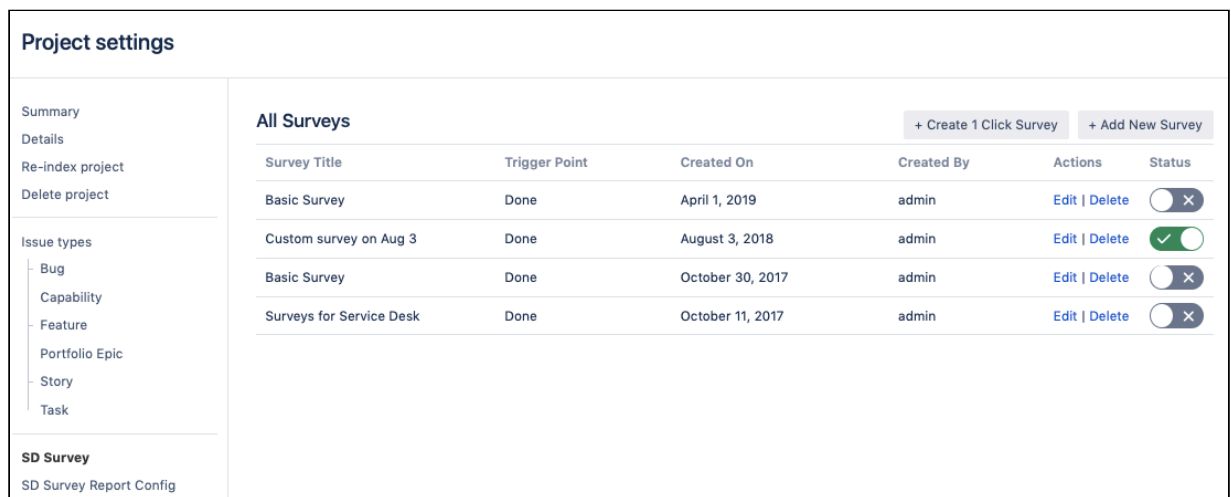
5.2 SP - Creating a Custom Survey

5.2.1 Prerequisites

- Ensure that your user has Admin permissions in JIRA
- Ensure that you have Surveys for Jira [installed and configured](#)(see page 13)
- Ensure that you have at least [one project selected](#)(see page 14) for the surveys

5.2.2 Creating a custom survey

1. Log into your Jira instance as Admin.
2. Go to cog wheel and select **Projects**.
3. Click the project that you have enabled the surveys for.
4. On the left panel, click **SD Survey**, which brings up the **All Surveys** page:



Project settings

Summary
Details
Re-index project
Delete project

Issue types
Bug
Capability
Feature
Portfolio Epic
Story
Task

SD Survey
SD Survey Report Config

All Surveys + Create 1 Click Survey + Add New Survey

Survey Title	Trigger Point	Created On	Created By	Actions	Status
Basic Survey	Done	April 1, 2019	admin	Edit Delete	<input type="radio"/>
Custom survey on Aug 3	Done	August 3, 2018	admin	Edit Delete	<input checked="" type="radio"/>
Basic Survey	Done	October 30, 2017	admin	Edit Delete	<input type="radio"/>
Surveys for Service Desk	Done	October 11, 2017	admin	Edit Delete	<input type="radio"/>

5. Click **Add New Survey**.
6. Go through the wizard step by step filling out the necessary fields as shown in the sections [below](#)(see page 0).
7. Click **Finish**.

5.2.3 Survey tabs

- [Content](#)(see page 28)
- [Questions](#)(see page 30)
- [Advanced Survey](#)(see page 31)
- [Trigger Point](#)(see page 32)
- [Frequency](#)(see page 35)
- [Success Message](#)(see page 36)
- [Survey Preview](#)(see page 37)

5.2.3.1 Content

Content tab – used for specifying details on how a survey email will look like and which content it should have.

Project settings

Summary

Details

Re-index project

Delete project

Issue types

- Bug
- Capability
- Feature
- Portfolio Epic
- Story
- Task

SD Survey

SD Survey Report Config

Workflows

Screens

Fields

Priorities

Versions

Components

Users and roles

Permissions

Content
Questions
Advanced Survey
Trigger Point
Frequency
Success Message
Survey Preview

Survey Content Setup

Use this tab to set up the survey email.

Survey Title

Survey Settings

Basic

Advanced

Survey Email Include

Rating Form

Web Link

Survey Email Subject

Survey Email Reply To

Use Project Email

Survey Recipient

Survey Email Body

Normal | T | A | B | I | U | List | x₂ | x² | Table | Image | Video | Link | Unlink | Bold | Italic | Underline | Text Color | Background Color | Undo | Redo | Clear All

Dear \$\$reporter\$\$,

\$\$assignee\$\$ has completed work on the \$\$issuekey\$\$ request (\$\$summary\$\$) from you. We would appreciate if you rate our services.

Please be sure to add a weblink (\$\$weblink\$\$) for the advanced survey. Click **Edit** to modify the text for the weblink.

Place Holders¹

Issue Type

Project

Created

Assignee

Updated

Status

Key

Description

Summary

Creator

Reporter

Last Comment

Total Time in Status

Email Footer

Normal
 T A B I U x_2 x^2

We take your feedback seriously and it will help us improve our services in the future.

Thank you!

Work With * Rating Yes or No ?

Rating Elements * Stars Numbers ?

Rates Count * ?

Ask user for a comment? Yes No Yes(with condition) ?

If the rating is

Add user comments to the ticket? Yes No ?

Hide user comments in the ticket? Yes No ?

Make comments private in the ticket? Yes No ?

Field	Description
Survey Title	Think up a name for your survey. This is an internal name to help you differentiate between your surveys.
Survey Settings	When you add a new survey, a basic survey (see page 18) with the most standard settings is created. Select "Advanced" here to enable advanced settings for a more tailored survey configuration. When you do so, new tabs appear with additional options – Questions and Advanced Survey .
Survey Email Include	You can customize your survey emails to include either a survey rating scale or to display a link to your survey form.
Survey Email Subject	Enter an email subject that you want your end users to see in the survey email.
Survey Email Reply To	By default, the surveys are sent from Jira service account, and people cannot reply to the survey emails. You can opt to select the email from the project settings as a reply-to email for the surveys.

Field	Description
Survey Email Body	<p>Here you can design a body of your survey that the end user will receive. As you design the header and footer, you can use the placeholder JIRA fields in order to automate your email template. The placeholder values wrapped by "\$\$" signs will be populated by the information submitted in the ticket that triggers the survey.</p> <p>You can make your survey stand out by designing it in line with your company brand. Use Upload Resources and Insert Resources buttons to use your visual assets.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>⚠ Be sure to insert the "\$\$weblink\$\$" placeholder in order to generate the URL of the custom template. The Edit button enables you to customize the name of the weblink shown in the email survey. For instance, you can make a link with a simple text message "Click here to access survey" or insert a linked image.</p> <div style="border: 1px solid #ccc; padding: 5px; display: inline-block; margin: 5px 0;"> Web Link (Edit) </div> </div>
Email Footer	Use the Footer field to provide a nice finish to your survey email.
Work With	Depending on how you want to shape your surveys you can choose to work with star rating or specify a yes/no question for the users.
Rating Elements	Some clients found it useful to work with a number scale as an alternative to a star scale. We listened and implemented. 😊
Rates Count	<p>You can choose to have a default 5 rating scale or decide to simplify it to less rating elements (3 - Good, 2 - Medium, 1 - Bad for instance) or have more granularity and change the rates count up till 10 for more sophisticated surveys.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>⚠ We highly recommend that you reset your survey statistics before changing your rating scale. Otherwise you risk to receive confusing data in your survey reports.</p> </div>
Other options	If you would like your users to submit a comment along with their star rating, select "Yes" for the Ask user for comment? option. You can modify whether this comment should be visible in the original ticket or only saved in a survey report and accessible to the Administrator only.

5.2.3.2 Questions

If a basic survey is limited to one survey question and one comment, custom survey enables you to add several custom questions to your survey and work with single/multiple choice questions and/or text fields.

Use the **Questions** tab to add your specific questions to the survey. When inserting your own questions, select the type of question you'd like to create and supply the appropriate options.

You can also specify which questions are **required to answer**.

Content **Questions** Advanced Survey Trigger Point Frequency Success Message Survey Preview

Add Survey Questions

Use this tab to add any types of questions to your custom survey.

#	Question	Type	Options	Actions	Is required
↑ ↓	How would you rat	Radio	<input type="text" value="Poor"/> x <input type="text" value="Average"/> x <input type="text" value="As expected"/> x <input type="text" value="Good job guys!"/> x	Add option Deactivate Remove	<input checked="" type="checkbox"/>
↑ ↓	Which service did	Checkbox	<input type="text" value="Service 1"/> x <input type="text" value="Service 2"/> x <input type="text" value="Service 3"/> x	Add option Deactivate Remove	<input type="checkbox"/>
↑ ↓	What can we do to	Text		Deactivate Remove	<input type="checkbox"/>

+ Add Question

Previous **Save**

⚠ Important

- If you select to include questions in your custom survey, be sure to add in the **#SdQuestion** placeholder on the Advanced Survey tab so that the questions will render in the external survey.
- Ensure that you click the **Save** button so that the questions render.

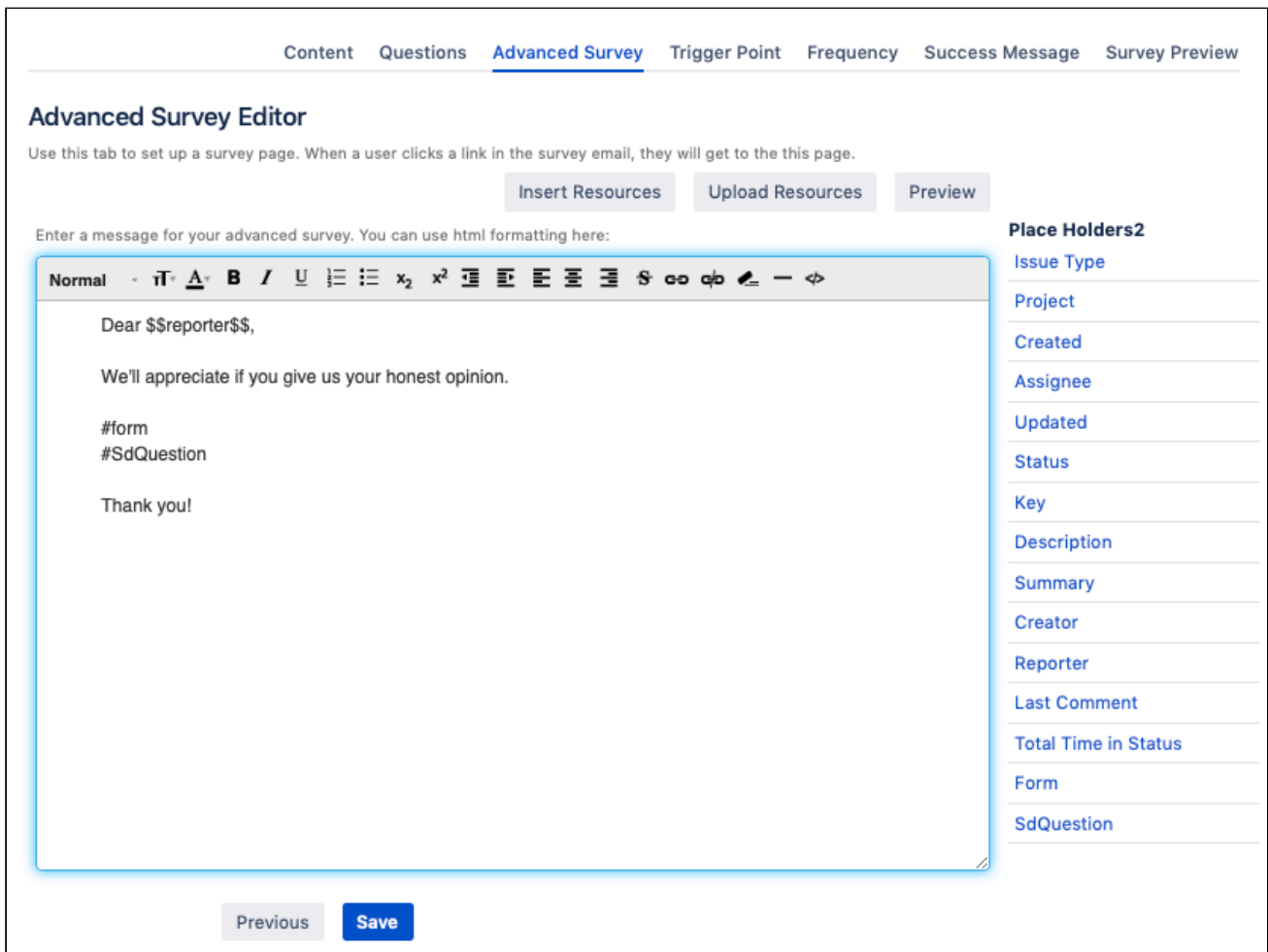
5.2.3.3 Advanced Survey

Use a WYSIWYG editor on the **Advanced Survey** tab to build your own template.

The placeholders section contains two additional items that are not available on the **Content** tab. Be sure to add both placeholders into your survey message.

- **#Form** — inputs a dynamic rating diagram
- **#SdQuestion** — inserts the questions created in the previous section

Additionally, you can select the `</>` html button if you want to upload your own coded template. If you want to upload and reference images, use the **Upload Resources** and **Insert Resources** buttons.



The screenshot shows the 'Advanced Survey Editor' interface. At the top, there are tabs: 'Content', 'Questions', 'Advanced Survey' (selected), 'Trigger Point', 'Frequency', 'Success Message', and 'Survey Preview'. Below the tabs, the title 'Advanced Survey Editor' is displayed. A sub-header reads: 'Use this tab to set up a survey page. When a user clicks a link in the survey email, they will get to the this page.' There are three buttons: 'Insert Resources', 'Upload Resources', and 'Preview'. Below these, a text prompt says: 'Enter a message for your advanced survey. You can use html formatting here:'. A rich text editor is active, showing a toolbar with various formatting options. The text in the editor is: 'Dear \$\$reporter\$\$,' followed by a blank line, 'We'll appreciate if you give us your honest opinion.', another blank line, '#form', '#SdQuestion', another blank line, and 'Thank you!'. To the right of the editor is a 'Place Holders2' sidebar with a list of fields: 'Issue Type', 'Project', 'Created', 'Assignee', 'Updated', 'Status', 'Key', 'Description', 'Summary', 'Creator', 'Reporter', 'Last Comment', 'Total Time in Status', 'Form', and 'SdQuestion'. At the bottom of the editor, there are 'Previous' and 'Save' buttons.

5.2.3.4 Trigger Point

On the **Trigger Point** tab, you can specify a condition that should trigger the email survey. This could be a change in the ticket status or a more complex JQL query.

Status change

By default, the "Done" status is set as trigger point, so whenever such issues reach the "Done" stage, an email survey is sent to the reporter - pending the survey [frequency](#)(see page 32) which you set in the next step.

Project settings

Summary

Details

Re-index project

Delete project

Issue types

- Bug
- Capability
- Feature
- Portfolio Epic
- Story
- Task

SD Survey

SD Survey Report Config

Workflows

Screens

Fields

Priorities

Versions

Components

Users and roles

Content Questions Advanced Survey **Trigger Point** Frequency Success Message Survey Preview

Trigger Point

Use this tab to define whether to send survey for all tickets meeting trigger point conditions or only certain ones.

Trigger Type: Status change JQL match [?](#)

- Task : Done
- Story : Done
- Bug : Done
- Epic : Done
- Capability : Select Status
- Portfolio Epic : Select Status

Trigger a SIL script when survey is sent [?](#)

Type to search for files Q

- silJql_ClosedParentOpenSubtasksByProject.sil
- silJql_CommentedProjectAfterDate.sil
- silJql_CommentedProjectTimeAgoByUser.sil
- silJql_FieldValueDoesntMatchEpic.sil
- silJql_IssuesWithSubtasks.sil
- silJql_LinkedIssuesByType.sil
- addComment.sil

Trigger a SIL script when survey feedback received [?](#)

JQL query

Alternatively, you can create a custom JQL query to serve as a trigger point or select a filter among the available saved filters.

Project settings

Summary

Details

Re-index project

Delete project

Issue types

- Bug
- Capability
- Feature
- Portfolio Epic
- Story
- Task

SD Survey

SD Survey Report Config

Workflows

Screens

Fields

Priorities

Versions

Components

Users and roles

Content Questions Advanced Survey **Trigger Point** Frequency Success Message Survey Preview

Trigger Point

Use this tab to define whether to send survey for all tickets meeting trigger point conditions or only certain ones.

Trigger Type: Status change JQL match [?](#)

Saved filter **Due this week (TEST)** [?](#)

Filter preview

```
project = 10100 and duedate >=
startOfWeek() and duedate <=
endOfWeek() ORDER BY priority
desc
```

Send survey once per issue [?](#)

Check every issue change [?](#)

Trigger a SIL script when survey is sent [?](#)

Type to search for files Q

- silJql_ClosedParentOpenSubtasksByProject.sil
- silJql_CommentedProjectAfterDate.sil
- silJql_CommentedProjectTimeAgoByUser.sil
- silJql_FieldValueDoesntMatchEpic.sil
- silJql_IssuesWithSubtasks.sil
- silJql_LinkedIssuesByType.sil
- addComment.sil

Trigger a SIL script when survey feedback received [?](#)

Integration with SIL

Starting with v3.2.3 for Jira 7 and v3.3.3 for Jira8, we have added the possibility for you to add automation and trigger other actions once the survey is sent or survey feedback is received. For instance, you can have an automatic comment posted in the ticket indicating that the survey was sent (as on the picture below) or change assignee, create another ticket, and so on. Now the endless possibilities of SIL¹⁰ are brought into Surveys for Jira.

¹⁰ <https://confluence.cprime.io/pages/viewpage.action?pageId=6560282>

Trigger a SIL script when survey is sent [?](#)

Select a folder to search 🔍

- 📁 silprograms
 - 📁 examples
 - 📄 addComment.sil
 - 📄 Re-index my first two projects

Trigger a SIL script when survey feedback received [?](#)

Type to search for files 🔍

- 📁 silprograms
 - 📁 examples
 - 📁 !Examples-ModsRequired
 - 📁 Custom_Field_Scripts
 - 📁 Event_Listeners
 - 📁 Functions
 - 📁 Schedulers_Interval-Cron

5.2.3.5 Frequency

Use this tab to specify the frequency at which the survey will be sent out based on the issues' level of importance.

By default, the app draws on the **Priority** field. So for instance if you set the frequency to 100% for the Blocker tickets and 10% for Normal ones – every reporter who submitted a Blocker ticket will receive a survey if it hits the trigger point and only 10% of reporters who submitted a Normal ticket will receive a survey pending ticket status.

Project settings

Summary

Details

Re-index project

Delete project

Issue types

- Bug
- Capability
- Feature
- Portfolio Epic
- Story
- Task

SD Survey

SD Survey Report Config

Workflows

Screens

Content Questions Advanced Survey Trigger Point Frequency Success Message Survey Preview

Mail Frequency

You can further filter the surveys sent based on the values in the certain fields. For example, you can ask for feedback for every major bug but for the minor ones - send surveys for only 10% of those.

Send surveys for all tickets

Filter surveys by

Select Field: Priority

Highest	100	%
High	100	%
Medium	50	%
Low	10	%
Lowest	10	%

Previous
Save

Alternatively, you can send surveys for only part of the tickets in your project, for instance, if you select the 100% for the Product 1, as in the screenshot, you will only survey people who submitted tickets for the products 1 and users of other products will not be affected.

Project settings

Summary

Details

Re-index project

Delete project

Issue types

- Bug
- Capability
- Feature
- Portfolio Epic
- Story
- Task

SD Survey

SD Survey Report Config

Content Questions Advanced Survey Trigger Point Frequency Success Message Survey Preview

Mail Frequency

You can further filter the surveys sent based on the values in the certain fields. For example, you can ask for feedback for every major bug but for the minor ones - send surveys for only 10% of those.

Send surveys for all tickets

Filter surveys by

Select Field: Product

Product 1	100	%
Product 2	0	%

Previous
Save

5.2.3.6 Success Message

Use a **Success Message** field to specify what the Reporter will see after they've submitted the survey. Alternatively, you can select not to notify a user.

Service Desk URL — if for some reason, a user opens the survey which has already expired, they can be redirected to your Service Desk portal or any other URL that you specify in this field.

Project settings

Summary

Details

Re-index project

Delete project

Issue types

- Bug
- Capability
- Feature
- Portfolio Epic
- Story
- Task

SD Survey

SD Survey Report Config

Content
Questions
Advanced Survey
Trigger Point
Frequency
Success Message
Survey Preview

Success Message

Specify the message to be shown to the user after submitting the survey

Success Message


Service Desk Home URL

Specify a redirect URL for people who opened expired surveys

Service Desk URL ?

5.2.3.7 Survey Preview

Use the preview tab to see at what your survey email and survey form will look like. This tab is very handy to make quick sanity checks before you click the **Finish** button.

 The placeholder values wrapped by "\$\$" signs will be replaced with the content from the Jira ticket that triggers the survey.


Email Preview

Here's what your survey will look like to end users.

Dear \$\$reporter\$\$,

\$\$assignee\$\$ has completed work on the \$\$issuekey\$\$ request (\$\$summary\$\$) from you. We would appreciate if you rate our services.

\$\$weblink\$\$



We take your feedback seriously, and it will help us improve our services in the future.

Thank you!

Survey Preview

Dear \$\$reporter\$\$,
We'll appreciate if you give us your honest opinion:



Comment :

how would you rate our services?

- Poor
- Average
- As expected
- Good job guys!

What can we do to make them even better?

Would you recommend us to your colleague / friend?

- Yep
- Probably
- Not sure
- No

Submit

5.2.4 What's next?

[SP - Activating a Survey](#)(see page 39)

5.2.5 See Also

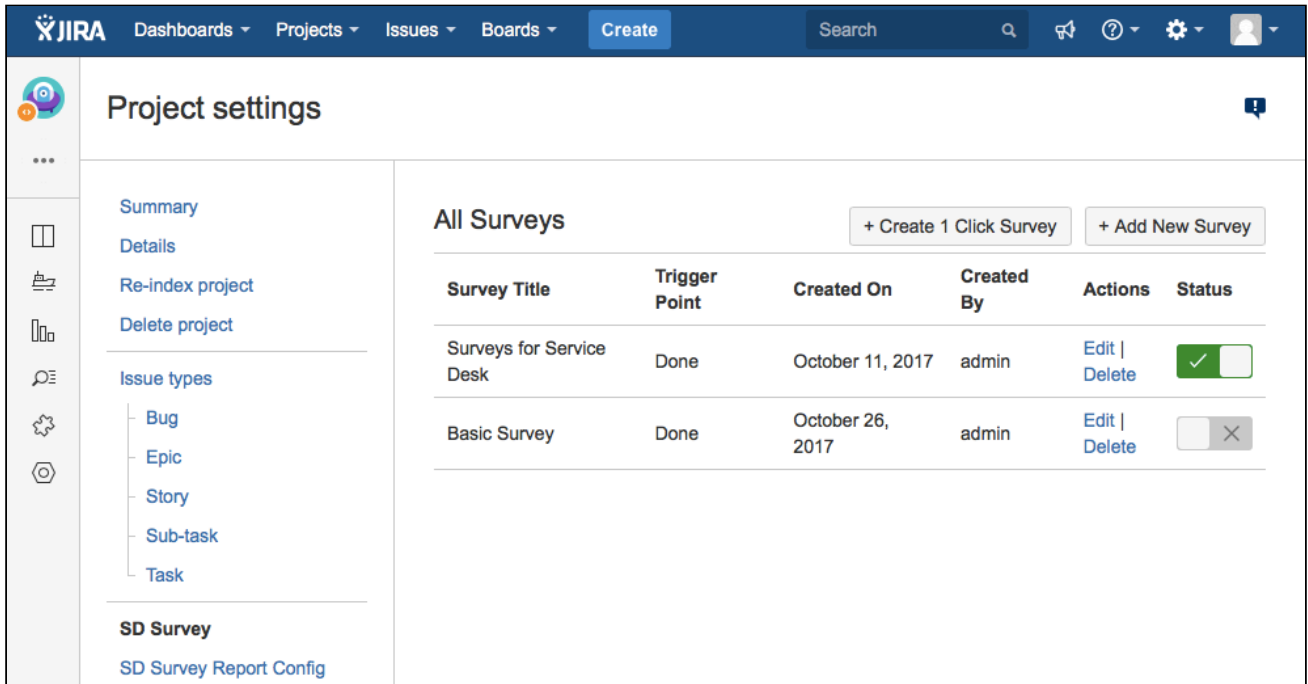
[SP - Creating basic survey](#)(see page 18)

5.3 SP - Activating a Survey

Once you create a survey, it's not activated right away so that your current active survey doesn't get interrupted.

To activate your survey:

1. Go to the project settings for a project for which you have set up a survey.
2. On the left panel, click SD Survey – the list of surveys opens.
3. Activate the necessary survey in the **Status** column.



The screenshot shows the Jira Project settings page. The left sidebar contains navigation options: Summary, Details, Re-index project, Delete project, Issue types (Bug, Epic, Story, Sub-task, Task), and SD Survey (SD Survey Report Config). The main content area is titled 'All Surveys' and contains a table with the following data:

Survey Title	Trigger Point	Created On	Created By	Actions	Status
Surveys for Service Desk	Done	October 11, 2017	admin	Edit Delete	<input checked="" type="checkbox"/>
Basic Survey	Done	October 26, 2017	admin	Edit Delete	<input type="checkbox"/>

⚠ There can be only one active survey per Jira project. Thus, when you activate a survey, another survey that is active at the moment gets deactivated.

Your survey is good to go!

5.3.1 What's next

Once your surveys are up and running, you can analyze stats based on your customer feedback on the [Survey Reports page](#)(see page 39).

5.4 SP - Results Reporting

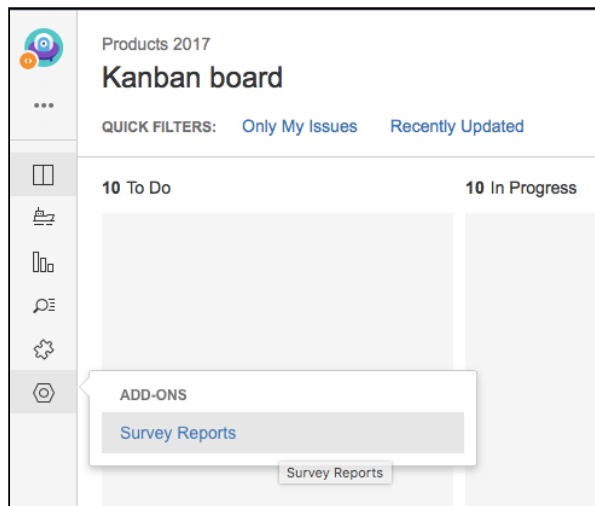
Survey reports help you track how your support team is performing, aggregate client responses and survey metrics, and analyze survey data.

- [Viewing reports](#)(see page 40)
- [Survey Dashboard](#)(see page 41)
- [Average Rating](#)(see page 41)

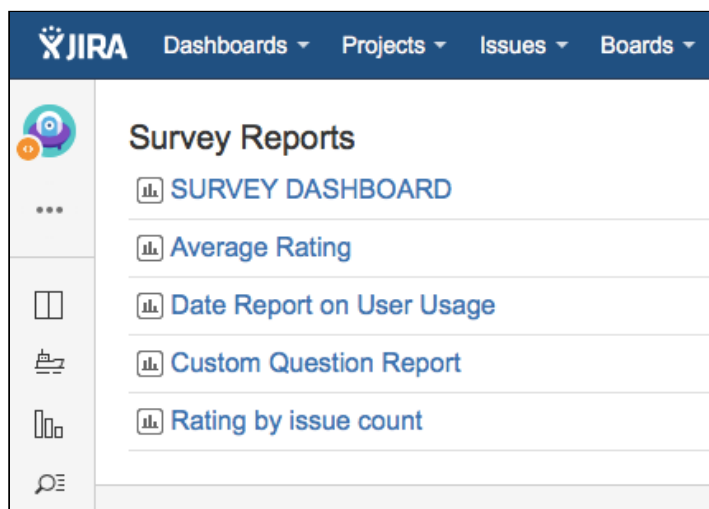
- [Date Report on User Usage](#)(see page 42)
- [Custom Question Report](#)(see page 42)
- [Rating by issue count](#)(see page 42)

5.4.1 Viewing reports

1. Ensure that you can [access survey reports](#)(see page 16) for the project.
2. Go to the project that you have enabled the surveys for.
3. In the ADD-ONS section, click **Survey Reports**.



4. As a result, you will see a list of surveys set up for this project.



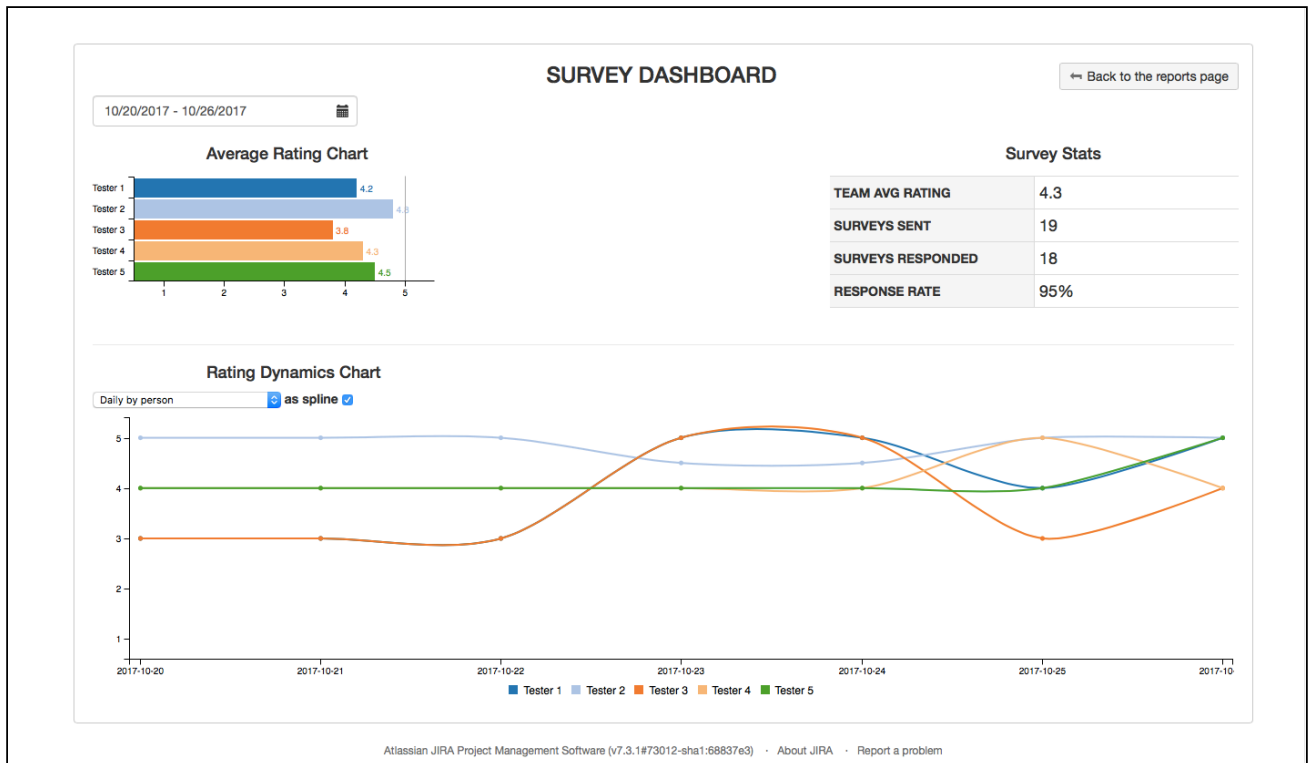
This is it! Enjoy your reports statistics and let us know if there is any other report that you might be interested in having.

You can always submit a feature request in our [support portal](#)¹¹.

¹¹ <https://jira.cprime.io/servicedesk/customer/portal/2>

5.4.2 Survey Dashboard

Survey Dashboard page brings you the most important metrics all in one page.



It helps you get answers to the following questions:

1. How satisfied are clients with my support team?
2. Is there any support agents who might need to work harder on their tickets based on the customer satisfaction?
3. Have the average team/employee ratings changed over time? How? What are the rating trends?
4. Are we sending enough surveys to understand customer satisfaction?
5. How responsive are clients to our surveys?
6. How is support agent A doing in terms of customer satisfaction?
7. I know that my support agent B was not doing great in terms of resolving clients' tickets quickly and thus - has had bad survey reviews. Has this changed?

You can filter out a certain time frame for your dashboard, show and hide lines on the Rating Dynamics chart and display normalized average data if necessary.

5.4.3 Average Rating

The Average Rating report is useful for analyzing all aggregated survey data in one place, organized in a sortable, searchable table that you can further filter based on various criteria. It shows you the following information:

- Average rating for **all tickets** in the project
- Survey rating for **every ticket** where clients filled out a survey
- User survey **comments** on each resolved ticket

- **Information** about the ticket - issue key, summary, date when a survey was responded, assignee, ticket priority, etc.

For quick navigation, the issue key is clickable so that you can quickly get to the ticket details.

You can export the report to PDF, CSV or copy data for further working with it.

5.4.4 Date Report on User Usage

This report gives you visibility into:

- Which surveys were **sent** and when,
- Which surveys have been **responded** and which are still **waiting** on the response
- Which **emails** the surveys went to and **IP addresses** from which the responses were received
- **Ticket information** like issue key, summary, reporter and assignee

Data in this report is searchable, sortable, and can be filtered by date. You can export the report to PDF, CSV or copy data for further working with it.

5.4.5 Custom Question Report

In case you set up advanced surveys for your project that have custom questions, you will see information about them in this report:

- **Ticket information** like a clickable issue key, summary
- User **comments** from the survey
- Custom **question** that you set up in the survey and the **answers** received from users

Data in this report is searchable which is especially useful for long string values like user responses. You can also sort data in the columns, search inside each column or the entire report and filter by date. You can export the report to PDF, CSV, or copy data for further working with it.

5.4.6 Rating by issue count

Use this report to get a quick view into which ratings your team is getting from the clients the most.

6 SP - FAQ

- [What is the limit of surveys that I can create?\(see page 43\)](#)
- [What is the limit of questions in the custom / advanced survey?\(see page 43\)](#)
- [Can we brand our survey?\(see page 43\)](#)
- [Can I export survey results?\(see page 43\)](#)
- [Do the surveys support skipping logic?\(see page 43\)](#)
- [I have created a survey using your plugin, why does the survey not send?\(see page 43\)](#)
- [I got my survey to send successfully but the email is not displaying the rating selection form\(see page 44\)](#)
- [After I upgraded to 3.0 version, I don't see all survey reports that were available in the previous version\(see page 44\)](#)

6.1 What is the limit of surveys that I can create?

It's unlimited. We have tested up to 10K+ surveys per project and it worked.

6.2 What is the limit of questions in the custom / advanced survey?

It's unlimited too. 😊 Some of our customers are using surveys with 50+ questions without any issues, and this is not the limit.

6.3 Can we brand our survey?

Yes! You can add your company logo, theme, add colors – Surveys for Jira support HTML and CSS formatting.

6.4 Can I export survey results?

Yes. Data tables support export formats to CSV, PDF, XLSX, data copy and table printing.

6.5 Do the surveys support skipping logic?

Yes, skipping logic is supported. You can use JQL filter for filtering the issues for which the survey will be triggered or select a frequency percentage configuration using which you can choose how often the survey should be triggered. For instance, you can send surveys for issues with "High" priority only.

6.6 I have created a survey using your plugin, why does the survey not send?

There could be a few possible reasons for this:

- You have not [selected this project\(see page 14\)](#) for the survey
- The ticket that you used to test the email survey did not progress to the stage selected for the survey [trigger point\(see page 32\)](#).
For example, trigger stage is set to *Resolved* but your ticket is still at *Waiting for Support* status.
- You have set the mail [frequency\(see page 35\)](#) to less than 100%. In this case a counter will send surveys for only a certain percentage of the tickets.

When testing the survey we recommend setting the frequency to 100% so that you can effectively test the sending functionality.

6.7 I got my survey to send successfully but the email is not displaying the rating selection form

This has been documented by some other survey companies as well. Sometimes your email client of choice might not render the form correctly. Please try another email client. If the issue persists please use our **Custom Survey** function so that the emailed survey includes a link to your customized HTML survey.

See here for further details on the rendering issue:

- <https://www.campaignmonitor.com/blog/post/2435/how-forms-perform-in-html-email/>
- <http://www.sitepoint.com/forms-in-email/>

6.8 After I upgraded to 3.0 version, I don't see all survey reports that were available in the previous version

The surveys are not deleted, reduced number of report entries is caused by the change of the report model starting from version 3.0. We had to change the report model as the old one blocked further development. The new report model enables us to further improve the report functionality in the direction we have planned.

Unfortunately the data migration of all entries from the old model to the new one was not possible because required information for a new model was missing in some old entries and was not possible to collect. Thus, during data migration we had to invalidate report entries which did not have linked date report entry with it and which were linked to the issue that had no assignee or reporter.

The old data is still there and you can see and use old report entries if you install the previous version of the Surveys for Jira.

The amount of surveys you see in the 3.0 version is the amount of entries that had required info for migrating to the new model. We had to make this step for providing better user experience and further growth of the project.