

1. SP - Configuring Surveys for Jira	2
2. SP - Using Surveys for Jira	6
2.1 SP - Creating basic survey	7
2.2 SP - Creating a Custom Survey	15
2.3 SP - Activating a Survey	27
2.4 SP - Results Reporting	28
3. SP - FAQ	31

SP - Configuring Surveys for Jira

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

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

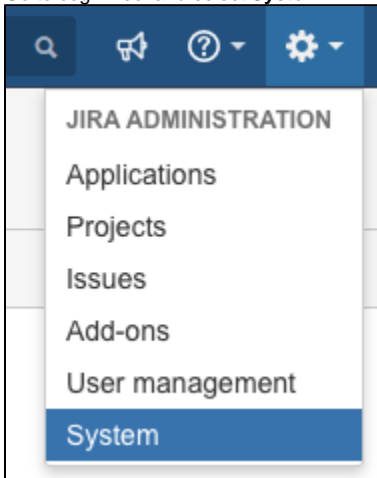
Installing Surveys for Jira

1. Log into your Jira instance as Admin.
2. Go to cog wheel and select **Add-ons**.
3. In the **Add-ons** tab, click **Manage add-ons**.
4. Click **Upload add-on** and select Surveys for Jira file.

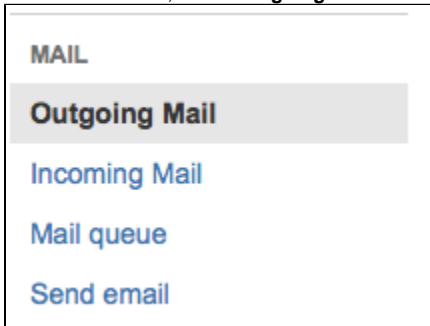
For more information about installing add-ons by file upload, see Atlassian documentation on [installing add-ons](#).

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 to send notifications](#). As a result, you should have something like this.

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**.

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**

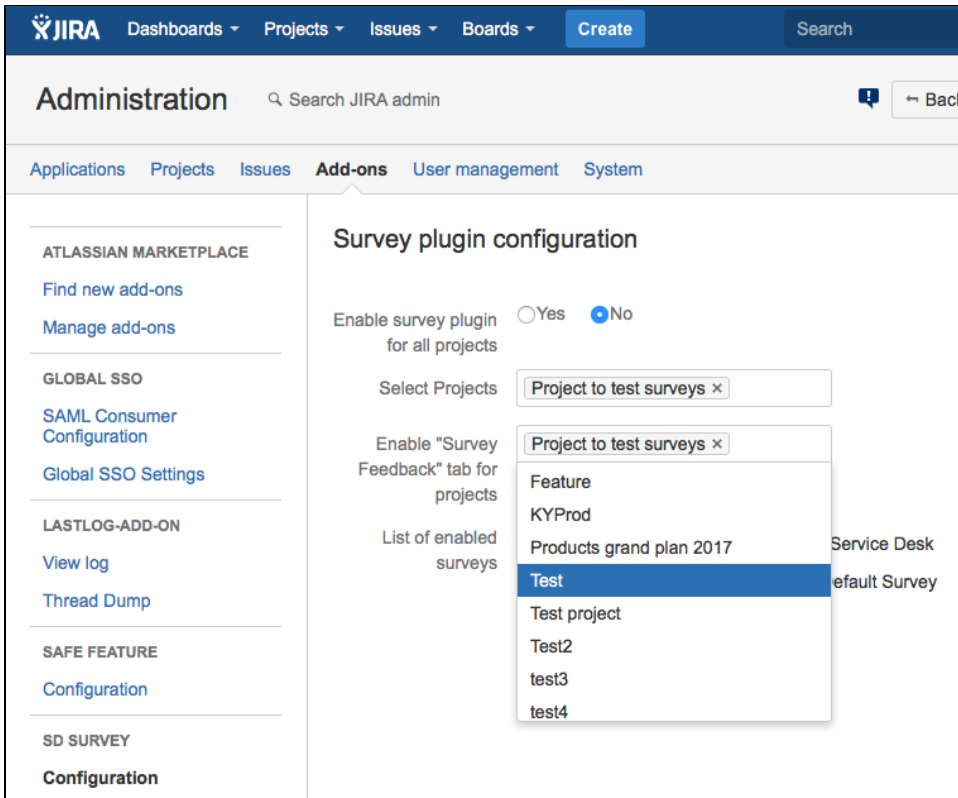
Start with adding projects you'd like the survey to be enabled for. To do this:

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.

5. Click **Submit**.

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**.

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.

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](#) or choose to [create a custom survey](#) as well.

See Also

[FAQ section for Surveys for Jira](#)

SP - Using Surveys for Jira

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

- [SP - Creating basic survey](#)
- [SP - Creating a Custom Survey](#)
- [SP - Activating a Survey](#)
- [SP - Results Reporting](#)

SP - Creating basic survey

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

Prerequisites

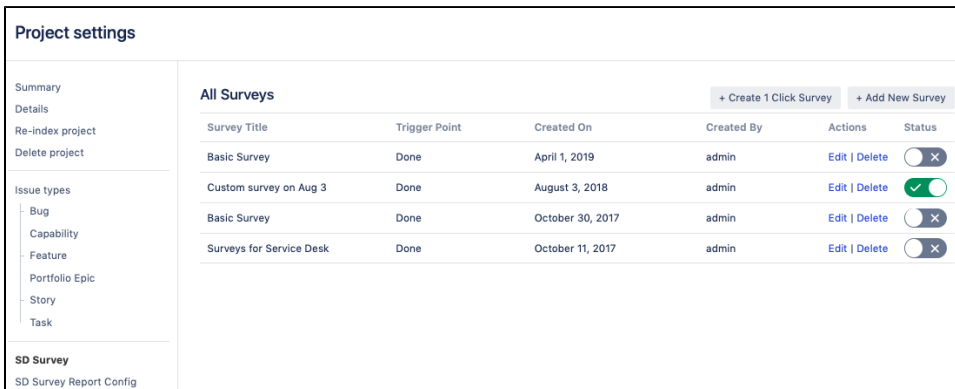
- Ensure that your user has Admin permissions in JIRA
- Ensure that you have Surveys for Jira [installed and configured](#)
- Ensure that you have at least [one project selected](#) for the surveys

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](#) it.

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="checkbox"/>
Custom survey on Aug 3	Done	August 3, 2018	admin	Edit Delete	<input checked="" type="checkbox"/>
Basic Survey	Done	October 30, 2017	admin	Edit Delete	<input type="checkbox"/>
Surveys for Service Desk	Done	October 11, 2017	admin	Edit Delete	<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**.

Survey tabs

- [Survey Content](#)
- [Trigger Point](#)
- [Frequency](#)
- [Success Message](#)
- [Survey Preview](#)

Survey Content

Survey Content tab is used for specifying details on how a survey email should look like and which content it will 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
- Issue Security
- Notifications
- Hipchat integration
- Development tools

[Content](#) | [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 Email Body [Upload Resources](#) [Insert Resources](#)

Normal
[T](#) [A](#) [B](#) [/](#) [U](#) [≡](#) [x2](#) [x2](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#)

Dear \$\$reporter\$\$,

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

Email Footer [Upload Resources](#) [Insert Resources](#)

Normal
[T](#) [A](#) [B](#) [/](#) [U](#) [≡](#) [x2](#) [x2](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#) [E](#)

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

Thank you!

[Save](#)

- Place Holders1**
- [Issue Type](#)
 - [Project](#)
 - [Created](#)
 - [Assignee](#)
 - [Updated](#)
 - [Status](#)
 - [Key](#)
 - [Description](#)
 - [Summary](#)
 - [Creator](#)
 - [Reporter](#)
 - [Last Comment](#)
 - [Total Time in Status](#)

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 with the most standard settings is created. The "Basic" option is used to utilize the default 5-star rating form. <div style="border: 1px solid #ffc107; 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.</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	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>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.

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](#) 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 [?](#)

[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 🔍

- 📁 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 [SIL](#) are brought into Surveys for Jira.

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

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

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

Thank you for the feedback!

Service Desk Home URL

Specify a redirect URL for people who opened expired surveys

Service Desk URL

Previous

Save

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

What's next?

[Activating a Survey](#)

See Also

[Creating a Custom Survey](#)

SP - Creating a Custom Survey

Prerequisites

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

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

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

Survey tabs

- [Content](#)
- [Questions](#)
- [Advanced Survey](#)
- [Trigger Point](#)
- [Frequency](#)
- [Success Message](#)
- [Survey Preview](#)

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

Custom survey on Aug 3

Survey Settings

- Basic
- Advanced

Survey Email Include

- Rating Form
- Web Link

Survey Email Subject

Please rate work on \$\$issuekey\$\$ r

Survey Email Reply To

- Use Project Email

Survey Recipient

Reporter

Survey Email Body

Upload Resources

Insert Resources

Normal **B** *I* U **A** **X₂** **X²** **☰** **☷** **☹** **☺** **☻** **☼** **☽** **☾** **☿** **♁** **♂** **♀** **↔**

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 ?

Upload Resources

Insert Resources

Normal ¶ 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 ?

Save

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 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.

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 #f0e68c; 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 black; padding: 5px; display: inline-block; margin-top: 10px;"> Web Link (Edit) </div> </div>
Email Footer	<p>Use the Footer field to provide a nice finish to your survey email.</p>
Work With	<p>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.</p>
Rating Elements	<p>Some clients found it useful to work with a number scale as an alternative to a star scale. We listened and implemented. 😊</p>
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 #e91e63; 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	<p>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.</p>

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**.

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	Poor Average As expected Good job guys!	Add option Deactivate Remove	<input checked="" type="checkbox"/>
↑ ↓	Which service did	Checkbox	Service 1 Service 2 Service 3	Add option Deactivate Remove	<input type="checkbox"/>
↑ ↓	What can we do to	Text		Deactivate Remove	<input type="checkbox"/>

+ Add Question

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.

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.

Advanced Survey Editor

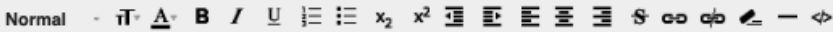
Use this tab to set up a survey page. When a user clicks a link in the survey email, they will get to the this page.

Insert Resources

Upload Resources

Preview

Enter a message for your advanced survey. You can use html formatting here:

Normal - 

Dear \$\$reporter\$\$,

We'll appreciate if you give us your honest opinion.

#form
#SdQuestion

Thank you!

Place Holders2

Issue Type

Project

Created

Assignee

Updated

Status

Key

Description

Summary

Creator

Reporter

Last Comment

Total Time in Status

Form

SdQuestion

Previous

Save

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](#) 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 [?](#)

[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 [SIL](#) are brought into Surveys for Jira.

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

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	<input style="width: 80%;" type="text" value="100"/>	%
High	<input style="width: 80%;" type="text" value="100"/>	%
Medium	<input style="width: 80%;" type="text" value="50"/>	%
Low	<input style="width: 80%;" type="text" value="10"/>	%
Lowest	<input style="width: 80%;" type="text" value="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	<input style="width: 80%;" type="text" value="100"/>	%
Product 2	<input style="width: 80%;" type="text" value="0"/>	%

Previous
Save

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

Thank you for the feedback!

Service Desk Home URL

Specify a redirect URL for people who opened expired surveys

Service Desk URL

Previous

Save

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

What's next?

[SP - Activating a Survey](#)

See Also

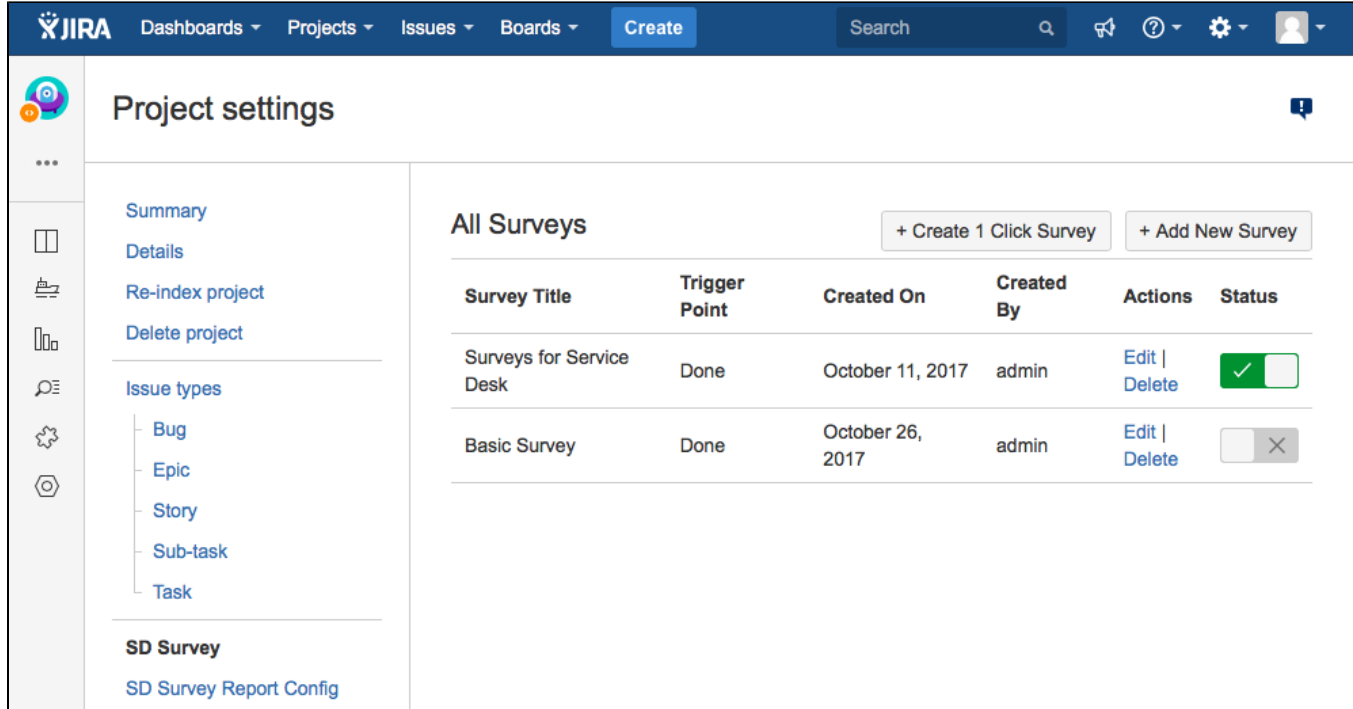
[SP - Creating basic survey](#)

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), SD Survey, and SD Survey Report Config. The main content area is titled 'All Surveys' and includes two buttons: '+ Create 1 Click Survey' and '+ Add New Survey'. Below these is 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!

What's next

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

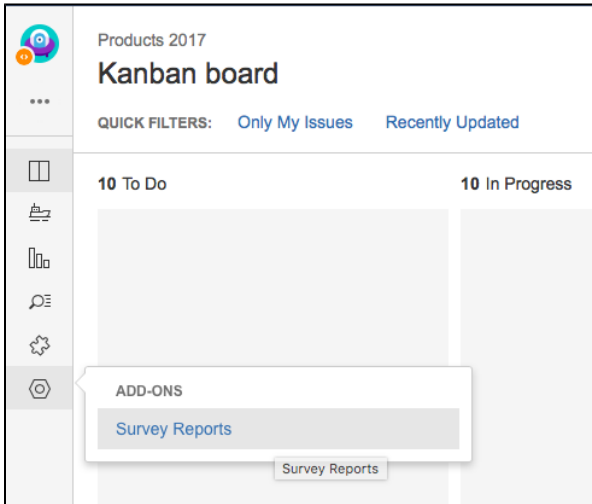
SP - Results Reporting

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

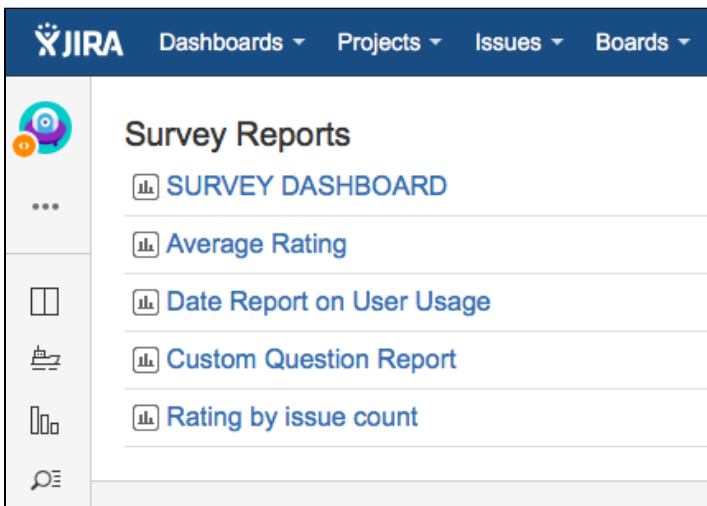
- [Viewing reports](#)
- [Survey Dashboard](#)
- [Average Rating](#)
- [Date Report on User Usage](#)
- [Custom Question Report](#)
- [Rating by issue count](#)

Viewing reports

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



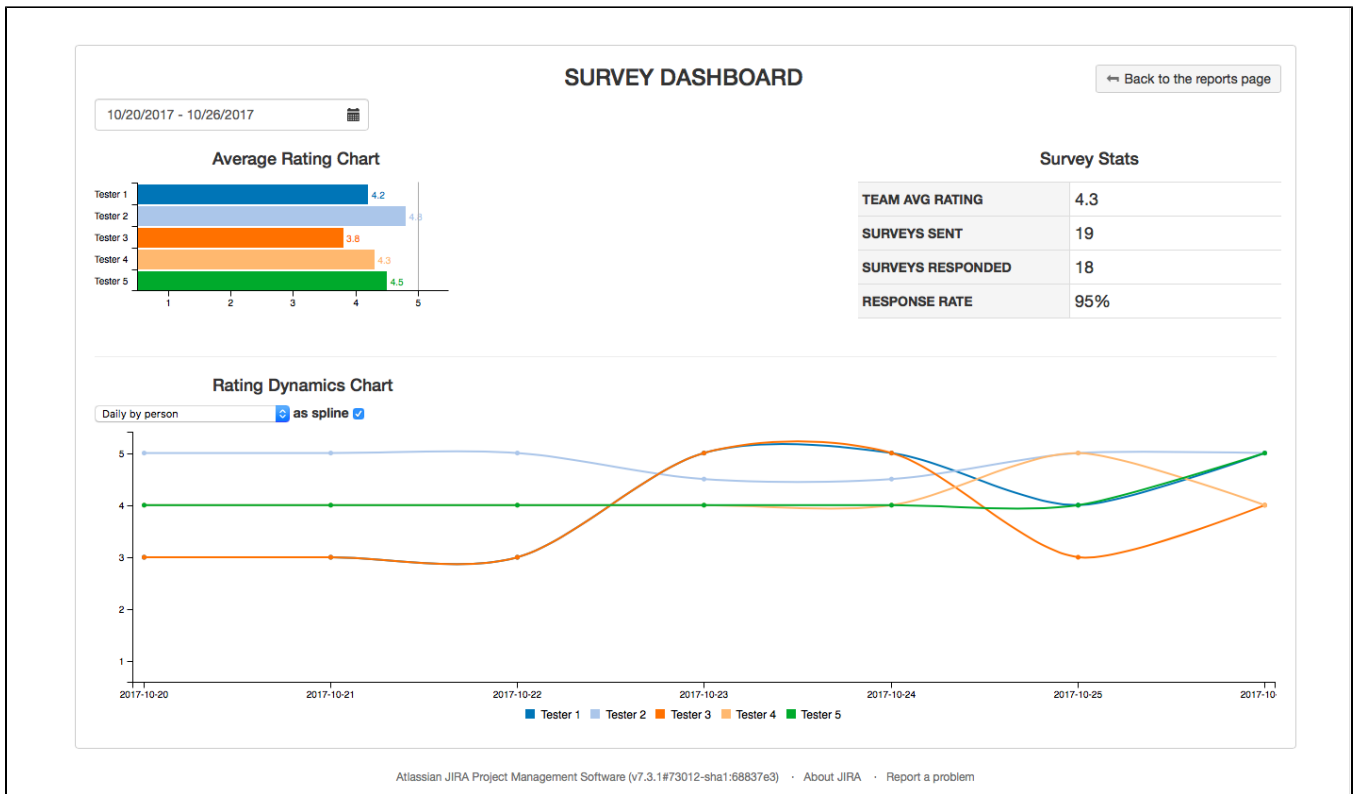
4. As a result, you will see a list of surveys set up for this project.



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](#).

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.

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.

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.

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.

Rating by issue count

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

SP - FAQ

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

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.

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.

Can we brand our survey?

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

Can I export survey results?

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

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.

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](#) 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](#). For example, trigger stage is set to *Resolved* but your ticket is still at *Waiting for Support* status.
- You have set the mail [frequency](#) 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.

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/>

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.