



Questionnaires

Planon Software Suite

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About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

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Document Conventions

Bold

Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text

Application names are displayed in italics.

CAPITALS

Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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Questionnaires – Concepts

This section describes the concepts available in Questionnaires and how they interact with each other.

See the links below for more information:

- [Questionnaire](#)
- [Question](#)
- [Answer option](#)
- [Unassigned question](#)
- [Linked question](#)
- [Score method](#)

Questionnaires

A set of questions with a choice of answers, devised for the purpose of a survey or to acquire additional information, so as to create a report on the answers derived from the questionnaire.

A questionnaire contains questions that must ultimately be answered by users on Self-service forms or Planon apps. The questionnaires must be linked to standard order(s) to be able to view the questions / answers in Work Orders .



For more information, see [Work orders](#).

Audit questionnaires

An **Audit questionnaire** is a specific type of questionnaire, used to register audits.


An audit is a systematic analysis of data in order to assess the effectiveness of various implementations in an organization. For example, an audit can be used to check on energy saving, water management, etc.

For audits, you can create an hierarchical structure with optional sub-questionnaires of up to three levels. You can group the questions over several topics and count scores per question/topic. The scores are aggregated for audit purposes. On any level of the questionnaire hierarchy, a questionnaire will get a score that is the sum of the scores of all sub-questionnaires and the scores of all its linked questions.

For more information on scores, see [Score method](#).

Once an audit questionnaire is linked to an order, it is no longer possible to:


- Change the questions.
- Link / unlink questions to / from the questionnaire.
- Change the answer options.
- Link / unlink answer options to / from the questions that are linked to a questionnaire.

 In order to make a questionnaire fit for audit purposes, select **Yes** in the **Audit?** field on the **General** tab.

Work-related questionnaires

A **Work-related questionnaire** is a specific questionnaire concept, with its own business object (**Work-related questionnaires** business object), which can be used to link questionnaires to the PMFS Live app , after which they can be completed on the app.


Work-related questionnaires can be displayed *dynamically* in the workflow of a work assignment (so, on configured status transitions). This makes work-related questionnaires specifically suited for use on mobile apps, because they can be shown to users at a relevant moment in their workflow.

 Regular or 'fixed' questionnaires (**Questionnaires** business object) can only be displayed on the **Done** status of the linked order / work assignment. See [Questionnaires](#) for more information.

Planon application managers can configure this feature by defining a **Questionnaire - work assignment scope**, linking this scope to a standard order and to a work assignment status transition (corresponding with a mobile status transition).

Work-related questionnaires allow for *mandatory* questions. Planon's [multiple active work assignments functionality](#) is also supported, so the same questionnaire can be presented to multiple individual app users, who can each fill in and submit their answers.

Scopes for work-related questionnaires are configured in Questionnaires . See: [Defining a scope for work-related questionnaires](#).

 The **Work-related questionnaires (base)** business object has subtypes. One subtype is the **Work-related questionnaire**. Another subtype is the **LMRA** questionnaire, which is used in Planon's **Health & Safety** solution. Back-office staff can view completed questionnaires that are linked to orders in the Work Orders TSI. Both **LMRAs** and **Work-related questionnaires** are displayed on the on the Order details > Work-related questionnaires selection step and the Order subdetails > Answer lines selection step, while LMRAs are also shown on a dedicated Order details > Last minute risk assessments selection step.

Question


In Planon ProCenter, the **Base question** business object contains the following question types:

- Single select
- Multi-select
- Decimal
- Integer
- Time
- Date
- Date-time
- Single line text
- Multi-line text

Depending on the type of question you select, you can:

- Type in the answers for single line / multi-line questions.
- Select from the answers provided for single select / multi-select questions.
- Select a date / time from the calendar for date / time questions.

Question is also a history aware business object. This means you can track its updates. The **Question history** can be logged on the **Answer options** selection level.


 For viewing modifications on the fields of a business object, you must enable the **History** option for these fields in **Field definer > Questionnaire > Details**.

Answer option

For single select and multi-select questions you can configure multiple potential answers: **Answer options**.

Depending on the type of question, there can be single select or multi-select answer options for the respective question types.

Answer options is a 'history aware' business object. You can track the changes made to answer options, which may support you in monitoring your business process.

 You can view the modifications to the fields of a business object if you enable the **History** option for these fields in **Field definer > Questionnaire > Details**.

Unassigned question

A question is unassigned if it is not linked to any questionnaire.

An unassigned question can be viewed by clicking the **Unassigned questions** icon on the tool bar on the **Questions > Questions** step. Once an unassigned question is linked to a questionnaire, it becomes a linked question.

Linked question

A linked question is linked to one or more questionnaires.

Every linked question has a unique sequence number that indicates the order in which the questions are displayed on the linked standard order.

If you change the sequence number of the questions in the **Linked questions** step, it will change the display order of the questions in the standard order.

The following example explains the effect of changing the sequence number of the questions:

Linked questions with sequence #	Display order
Q1 – 10	Q1
Q2 – 20	Q2
Q3 – 30	Q3
Q4 – 40	Q4

Linked questions after changing the sequence #	Display order
Q1 – 40	Q3
Q2 – 20	Q2
Q3 – 10	Q4
Q4 – 30	Q1

Score method

In an audit questionnaire, you can assign scores to answers and questions. The calculation of scores depends on the type of question selected.

The score methods are as follows:

- For open questions such as Single line/Multi-line text, Date-time, Decimal or Integer, you can give a fixed score for the question or you can have the score filled in by the evaluator of the audit.

- For the single select and multi-select questions, assign a score per answer option separately. Unlike open questions, the question definition itself does not have a score value.
When a single select question is answered, the score of the selected answer option is used as the score for the question.
When a multi-select question is answered, the score of all selected answer option are added and the sum is used as the score for the question.
- For an answer option without any score, the value zero is assigned.
- Only if the field **Options will have score** (while adding a question) is selected to **No**, the question will not have any scores.

For more information on questionnaire, see [Audit Questionnaire](#).



For more information on working with questionnaires in the **Work orders** TSI, see the WebHelp topic [Working with questionnaires](#).

Working with Questionnaires

This section describes the processes and tasks that can be performed in the Questionnaires TSI.

See the links below for more information:

- [Adding a questionnaire](#)
- [Linking questions to a questionnaire](#)
- [Linking standard orders to a questionnaire](#)
- [Adding questions](#)
- [Linking questionnaire to questions](#)
- [Adding answer options](#)

Adding a questionnaire

You can add a questionnaire and then link it to questions and answers.



If you update/modify an answered Questionnaire, an alert message is displayed that the questionnaire has already been answered and changing it would result in changing its answers.

You should avoid changing questions which have already been answered in the questionnaire, unless it is a minor spelling change. If there is a change in the question itself, you must archive the question and create a new one to avoid confusion.

Procedure

1. Go to Questionnaires.
2. On the action panel, click Add.
3. Complete the relevant fields in the data section. For a description of these fields, refer to Questionnaire fields.

Linking questions to a questionnaire

You can link a questionnaire to one or more questions.



A single question can be linked to several questionnaires.


Procedure


1. Go to Questionnaires.

2. In the element list, select the questionnaire to which you want to link questions.
3. On the action panel, click Link questions.

The Link questions dialog box appears.

4. Select the questions that you want to link in Available and move them to In use.
5. Click OK. The selected questions are linked to the questionnaire.

 To unlink, move the questions from **In use** to **Available**.

 Linking a great number of questions to a questionnaire can have a negative impact on the performance. The impact will become evident when processing an order that is based on the standard order linked to this questionnaire. The exact number of questions that will reduce the performance, as well as the impact on the performance, depends on your local infrastructure. However, it is recommended to limit the number of linked questions to 25.

Linking standard orders to a questionnaire

You can link standard orders to a questionnaire so that the questionnaire with a set of questions and answer options can be seen on the linked standard order in Work Orders . You can link a single questionnaire to several standard orders.

Procedure

1. Go to Questionnaires.
2. In the element list, select the questionnaire to which you want to link a standard order.
3. On the action panel, click Link Standard orders.

The Link Standard orders dialog box is displayed.

4. You can link either general questionnaires (without audits) or questionnaires for audits to a standard order, but not both.
5. Select one or more standard orders from Available and move it (them) to In use.
6. Click OK. The Standard order(s) are linked to the selected questionnaire.

To unlink, move the standard orders back from In use to Available.

If a standard order is linked to a questionnaire, the Standard order detail field on the Questionnaire level displays the code, description and the user order type of the linked standard order(s). It is recommended to align the standard order code with the questionnaire code to simplify the import through Enterprise Talk.

Once the standard order is linked to a questionnaire, the questionnaire is displayed on a separate tab on the **Orders** level in Work Orders .



For more information, see *Work Orders > Questionnaire tab*.

Adding questions

You can add several types of questions to a questionnaire:

- date
- date-time
- time
- single line/multi-line text
- multi-select

Procedure

1. Go to Questions.
2. On the action panel, click Add.
3. From the drop-down list, select the type of question you want to create.
For example: Single select question.

For more information on the types of questions you can add, see [Question](#).

4. Complete the relevant fields in the data panel. For a description of these fields, see Question fields.
5. Click **Save**.

After saving the question, you can add the required answer options. There are two ways you can do this:

- the quick way (not all **Answer option** fields are available): on the **Questions** selection step. See step 6 and further of this procedure.
 - the more detailed way (all **Answer option** fields are available): on the **Answer options** selection step. See [Adding answer options](#).
6. Go to the **Answer options details** field. Here you can add, update or delete answer options. This field shows the linked answer options. Use the **Add answer options** button to add new answer options. You can change data per answer option. To delete an answer option: click the red cross icon next to the answer option you want to delete. For a description of all the available fields for answer options, see Answer option fields.

7. Repeat the procedure for creating the other question types: Single select, Multi-select, Single line text, Multi-line text, Time, Date and Date-time.



You should avoid *changing* questions which have already been answered in a questionnaire, unless it is a minor spelling change. If there is a change in the question itself, you should archive the question and create a new one to avoid confusion. When you update/modify an already answered question, an alert message is displayed that the question is already answered and changing it would result in changing its answered instances in all the linked questionnaires.



You can also create questions using a template. For more information, see [Creating new questions from a template](#).

Creating new questions from a template

You can use a template as a starting point for creating new questions. By using a template you can save time and effort and give the final questionnaire a consistent and professional look.

Procedure

1. Go to Business processes > Questionnaires.
2. Go to Questions > Questions.
3. On the action panel, click **Add template**

There is an action for each type of question template:

- **Add Date template**
- **Add Date-time template**
- **Add Decimal template**
- **Add Integer template**
- **Add Memo template**
- **Add Multi-select template**
- **Add Single select template**
- **Add Text template**
- **Add Time template**



Configuration tip: instead of adding the template actions to the layouts of the individual question types, it is more convenient to add the template actions for the different question types to the layout of the **Base question**. The functional application manager or a user with comparable authorization can do this in Layouts . For more information, see [Layouts](#).

4. Complete the relevant fields in the data panel. For a description of these fields, see Question fields.


The **Template?** field is automatically populated by Planon and set to **Yes**. Note that the field is read-only.

5. On the **Links** action panel, click **Link questionnaires**.

For more information, see [Linking a questionnaire to questions](#).

After linking the template to a questionnaire, Planon automatically:




- Creates a copy of the template; this copy is linked to the questionnaire, *not* the template.
- Sets the **Template?** field to **No**.
- Generates a unique code for the question.




 You can quickly retrieve all template questions by filtering on the **Template?** field.

Linked questions **Questions** Questionnaire history

No filter - click to add or show filters

Template? = Yes No None

S... ^	Code	Description
<input checked="" type="checkbox"/>	Base question (3)	
	ME2023	Template - memo
	MS01	Template - multiselect
	SI20	Template - single select

Linking a questionnaire to questions

For the questions become part of a questionnaire, you must link questionnaires to them. You can link a single question to several questionnaires. All the linked questions can be viewed in the **Linked questions** step and the unlinked questions are displayed if you click the **Unassigned questions** button in the tool bar.

You can only link questions to the lowest level in a questionnaire hierarchy.

Procedure

1. Go to Questions.
2. In the element list, select the question to which you want to link a questionnaire.
3. On the action panel, click Link questionnaires.

The Link questionnaires dialog box appears.

4. Select one more questionnaire(s) you want to link from the Available list and move them to In use.
5. Click OK. The selected questionnaire(s) is linked to the question.
To unlink a questionnaire, move it back from In use to Available.



If a linked question of a questionnaire which is already answered is removed, the questions will not be displayed on the **Questionnaire** tab in Work Orders .



For more information on the **Questionnaire** tab, see *Work Orders* .

Adding answer options

You can provide **Answer options** for 'multiple choice questions'. Both 'single select' and 'multiselect' answer options can be created in the form of radio button and check box options.

There are two ways to add answer options:

- the quick way (not all **Answer option** fields are available): on the **Questions** selection step (see [Adding questions](#));
- the more detailed way (all **Answer option** fields are available): on the **Answer options** selection step (see procedure below).



For questionnaires of the *E: Last minute risk assessment* type, you can configure blocking answer options that will prevent field engineers from starting / resuming a job for safety reasons.




When you update/modify an answer, an alert message is displayed that the answer option is already selected as an answer and changing it would result in changing its answered instances.

Procedure

1. Go to Questionnaires > Questions.
2. In the element list, select a multiple choice **singleselect** or **multiselect** question.
3. Go to Answer options and click Add on the action panel.
4. Complete the relevant fields in the data panel. For a description of these fields, see Answer option fields.
5. Click **Save**.


Defining a scope for work-related questionnaires (PMFS Live app)

If you intend to use work-related questionnaires on your PMFS Live app , you must define a scope for these questionnaires. A 'questionnaire - work assignment' scope consists of several settings that will ensure that a work-related questionnaire is displayed at the right moment in the app's workflow.

 In this procedure it is assumed that you already have created a relevant questionnaire with questions and answer options, which can be used as work-related questionnaire on a Planon app. *Good to know:* Questionnaires with *mandatory* questions are ideally suited as work-related questionnaires, because they are presented in the relevant context (with regard to workflow and user).

Procedure

1. Go to the Questionnaires TSI.
2. At **Questionnaires**, select the questionnaire you want to display on the mobile app.
3. Navigate to the **Questionnaire - work assignment scopes** step.
4. On the action panel, click **Add**.
5. On the data panel fill in a relevant **Code** and **Description**.
6. In the **Questionnaire** field, select the questionnaire that should be displayed as work-related questionnaire.
7. In the **Applicable work assignment status** field select the status at which the questionnaire must be presented. For example: select **Work** if the questionnaire must be displayed when an engineer selects the **Work** action on the app. The available statuses are: **Work**, **Travel**, **Temporary fix** and **Done**.
8. If you selected the **Done** status, you can either select **Yes** in the **Applicable only if 'All work is complete' = Yes?** field, if you only want to display this questionnaire when the app user sets the field **All work complete?** to **Yes**. Or select **No** to show the questionnaire always, regardless of the work being complete or not.

 Setting this field to **Yes** is only relevant if you have enabled the use of 'multiple work assignments'.

9. In the **Applicable only to 'key' work assignments?** field, select **Yes** if you only want the questionnaire to be displayed on a key work assignment. Select **No** if it should be displayed on all work assignments linked to the order.



Setting this field to **Yes** is only relevant if you have enabled the use of 'multiple work assignments'.

10. On the action panel, select **Link standard order**.
11. In the **Link standard order** dialog, move the standard order(s) that must be linked to this work-related questionnaire to the **In use** section.

The selected field(s) will be displayed in the Standard order details field on the layout.

12. Click **OK**.

The scope for the 'questionnaire-work assignment' combination is now defined. Consequently, if the back-office adds an order based on the standard order with the linked *scope* and they assign the associated *work assignment(s)* to an engineer, the work-related questionnaire is displayed at the right point in the work flow of the work assignment (i.e. when the engineer selects an applicable work assignment status on the app).

Filtering in Questionnaires

Filtering is supported only for specific scenarios in Questionnaires .

See the links below for more information:

- [Scenarios supported](#)
- [Scenarios not supported](#)

Scenarios supported

Scenario I

You can filter all orders with a specific answer for a question. For example, you can filter all the orders that have the answer 'Green' to the question, 'Which color do you want?'

Multiple items have been selected

Order Number	Questionnaire Code	Question Code	Question Description	Single select answer Description
Answer line (7)				
157.01	12	123	What color do you want?	GREEN
158.01	12	123	What color do you want?	GREEN
160.01	12	123	What color do you want?	GREEN
161.01	12	123	What color do you want?	GREEN
162.01	12	123	What color do you want?	GREEN
165.01	12	123	What color do you want?	GREEN
166.01	12	123	What color do you want?	GREEN

Scenarios not supported

Scenario I

Filter all orders with a specific answer to more than one question. For example, filter orders with the answers:

- 'Green' to the question 'Which color do you want?'
- 'Yes' to the question 'HR impact?'
- '11/11/2011' to the question 'Certification date?'

Scenario II

Use a different operator to find orders with certain answers.

For example, filter orders with the operator 'not equal' to 'Green', for the question 'Which color do you want?' and a date between '01/11/2011 and 31/12/2011' the question 'Certification date?'

Reporting in Questionnaires

Reporting is supported only for specific scenarios in Questionnaires .

See the links below for more information:

- [Scenarios supported](#)

Scenarios supported

Scenario I

You can create a report of a questionnaire with questions and answers.

Scenario II

You can create a report with question and answers in the questionnaire while setting a sort condition on one of the questions and answers.

Scenario III

You can create a report with totals per answer per question.

Mail merges in Questionnaires

Mail merging is only supported for specific scenarios in Questionnaires .

See the links below for more information:

- [Scenarios supported](#)
- [Scenarios not supported](#)

Scenarios supported

Scenario I

You can create a ticket with the answers on the questions in the questionnaire.

```
Dear Mr. Lee,  
We have received your complaint and recorded it with number  
We have captured next statements:  
Question           Answer  
HR Impact          YES  
Which color do  
you want           GREEN  
What is your  
firstname ?  
  
We will do our utmost to solve this issue.
```


Scenarios not supported


Scenario I

Create a ticket with the information of the answers of a specific question.

Questionnaires – Field Descriptions




Questionnaire fields


Field	Description
Audit?	Select Yes to define a questionnaire for audit purposes. This will enable you to create questionnaire with hierarchy (sub questionnaire) and scores. This setting is automatically applied to all the sub questionnaires and the setting cannot be changed after saving the questionnaire. <div data-bbox="602 779 1317 898" style="border: 1px solid blue; padding: 5px;"> If you select Yes in the Audit? field, the additional fields Proof of evidence and Additional comment are displayed on the Questionnaire tab in Work Orders .</div>
Code	Enter a code for the questionnaire.
Description	Enter a description for the questionnaire. The same description can be entered in the Translated name field.
Display of questionnaire in PMFS	Select an option from the list: A: Do not use in PMFS: if this option is selected, the questionnaire is NOT displayed in PMFS. B: Before starting work: if this option is selected, the questionnaire is displayed before the engineer starts his/her work. C: After ending work: if this option is selected, the questionnaire is displayed after the engineer completes his/her work. D: In job main menu: if this option is selected, the questionnaire is displayed in the main job menu. E: Last minute risk assessment: if this option is selected, the questionnaire can be configured for the EHS wizard in Planon AppSuite.
Linked questions	Displays details about the questions linked to the questionnaire.
Parent level	Select a parent if the added questionnaire is a sub. This option only applies to sub questionnaires.

Field	Description
Questionnaire alias	<p>This alias field is exclusively and specifically intended to reduce the dependency between any applicable decision rules and questionnaires.</p> <p>If you create a new questionnaire it will get a unique code, but the 'alias' that you define here for the decision rule can be re-used.</p>
Sequence number	<p>Enter any number between 0 and 9999 (inclusive). The sequence number is used to display the sub questionnaires according to the selected sequence in the Questionnaire tab on orders.</p>
Translated name	<p>This section allows you to enter translations for the questionnaires.</p> <p>A user can see the questionnaires in the language that is selected for his/her user account.</p> <p>For enabling translations, you must select the Is user-translatable property of the business object in Field definer.</p>
<div style="border: 1px solid black; padding: 5px;">  Not all business objects are user-translatable. For more information, refer to Field definer . </div>	
Weight percentage	<p>Enter a number that will be used to calculate the weighted percentage of scores in the Questionnaire tab on orders. The purpose of weight factor on questionnaire is to average the scores at various levels in the sub questionnaires.</p> <p>This feature only applies to sub questionnaires.</p>



Question fields

Field	Description
Answer options details	<p>The Answer options details field shows the linked answer options of a question. Use the Add answer options button to add new answer options. You can change data per answer option. To delete an answer option: click the red cross icon next to the answer option you want to delete. For more information, see Adding questions and Adding answer options.</p>
Code	<p>Enter a code for the question.</p>
Default value	<p>Allows you to input default answer to a question. For the date/time and time questions, you can use macros allowed by Planon ProCenter to input the default values.</p>


Field	Description
	<p>For example, for the question, 'What is the current date and time,' the default answer can be provided by the macro &DATETIME which displays current date time.</p>
	<p> For more information on macros, refer to Relative date-time filters in <i>Fundamentals</i>.</p>
	<p> Note that the &CODEGEN macro is not supported.</p>
Description	<p>Enter a description for the question. The same description can be entered in the Translated name field.</p>
Mandatory?*	<p>Select Yes to make the question mandatory in the linked questionnaire. No is selected by default.</p>
Maximum score value	<p>Enter a maximum score value for a question. This value is used to restrict the score for a question. If the total score of a question exceeds maximum score value, this will be taken as the score value.</p>
Options will have score	<p>Select Yes to have scores for options. This field is only available for single select and multi-select question types.</p>
	<p> If a question definition has at least one answer with a score, then all answers must have scores.</p>
Question alias	<p>This alias field is exclusively and specifically intended to reduce the dependency between any applicable decision rules and questions.</p> <p>If you create a new question for a questionnaire it will get a unique code, but the 'alias' that you define here for the decision rule can be re-used.</p>
Score method	<p>Select a method to score open questions of type: Single line / Multi line text, Date-time, Decimal or Integer.</p> <p>The score is calculated based on the option selected from the following list.</p> <ul style="list-style-type: none"> • Fixed score – Displays non-editable score field on the questionnaire form. • Open score – Displays editable score field on the questionnaire form. • No score – Score field will not be displayed on the questionnaire form.
Single select option type	<p>Select if the single select option should be Radio button group or Combo box group.</p>

Field	Description
Tag	<p>Enter a tag to filter the questions in the elements list. This way you can quickly find your way through a large set of questions. You can enter up to 30 characters in this field (spaces are allowed). For more information on searching and filtering in Planon, see Searching / filtering.</p> <p>Make sure that the field attribute Simple selection is set to Yes for the Tag field, so that it is available as a search criterion in all relevant search bars. For more information, see Field attributes.</p>
Translated name	<p>This section allows you to enter translations for the questions.</p> <p>A user can see the questions in the language that is selected for his/her user account.</p>
<div style="border: 1px solid #00a0e3; padding: 5px;"> <p> To enable translations, you must select Is user-translatable on the business object in Field definer.</p> </div>	

Answer option fields

Field	Description
Code	Enter a code for the answer option.
Description	<p>Enter a description for the answer option. The same description can be entered in various languages in the Translated name fields.</p>
<div style="border: 1px solid #00a0e3; padding: 5px;"> <p> You can modify the field values of multiple answers by using Modify within selection.</p> </div>	
Question	Select a question from the list for which you want to create answer options.
<div style="border: 1px solid #00a0e3; padding: 5px;"> <p> If you select a multiple choice <i>single select</i> question, the answer options will be of the <i>radio button</i> type. If you select a multiple choice <i>multiselect</i> question, the answer options will be of the <i>check box</i> type.</p> </div>	
Default value	Select Yes to display the answer option as the initial value for the selected question.
Blocking?	This field is only relevant for questionnaires of the <i>E: Last minute risk assessment</i> type. Select Yes to make an answer option 'blocking' in the AppSuite > My jobs > EHS wizard . If a field engineer selects

Field	Description
Score value	a blocking answer option in the wizard, it will be impossible to start / continue work on the order.
Sequence number	Enter a score value for the answer option. Enter any number between 0 and 9999 (inclusive). The sequence number is used to display answers according to the given sequence.
Translated name	This section allows you to enter translations for the answer options. Users can see the answer options in the language that is selected for their user account.

 In order to enable translations, you must select the **Is user-translatable** property of the business object in Field definer.

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