

Symphony

Event Management

Using the Symphony Survey Module

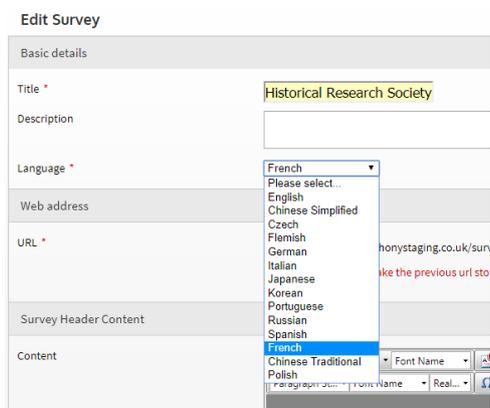


How to use Master Surveys

Master Surveys are inaccessible to Symphony users that do not have the following account levels: Account Owner, Administrator.

The purpose of Master Surveys is to be able to create, edit and use a general Survey across all events hosted on Symphony. Master Surveys can be found by visiting your Symphony client, clicking the 'Other' tab and using the Master Surveys link on that page.

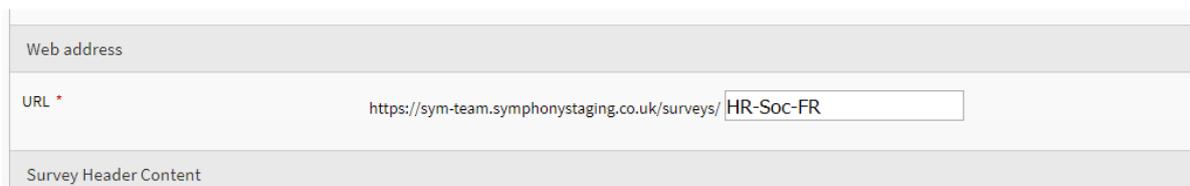
After clicking the Add Survey button you will be taken to a page where you can setup the basic details for your new Master Survey. This screen has a variety of different fields which will affect what appear on the survey itself when viewed by a potential respondent, including: Header HTML, Footer HTML, Completed Page Content, Closed/Under Construction Content and Loading Content.



The screenshot shows the 'Edit Survey' interface. The 'Language' dropdown menu is open, displaying a list of languages: French (selected), Please select..., English, Chinese Simplified, Czech, Flemish, German, Italian, Japanese, Korean, Portuguese, Russian, and Spanish. The 'Title' field contains 'Historical Research Society'. The 'URL' field contains 'https://sym-team.symphonystaging.co.uk/surveys/HR-Soc-FR'.

After selecting an appropriate name for your Master Survey – make sure it's recognisable – you will be asked to choose a language. The language choice is important because it will allow you to link clients or markets the right survey; it also comes into play when creating and using Master Questions, which will be explained later in the document.

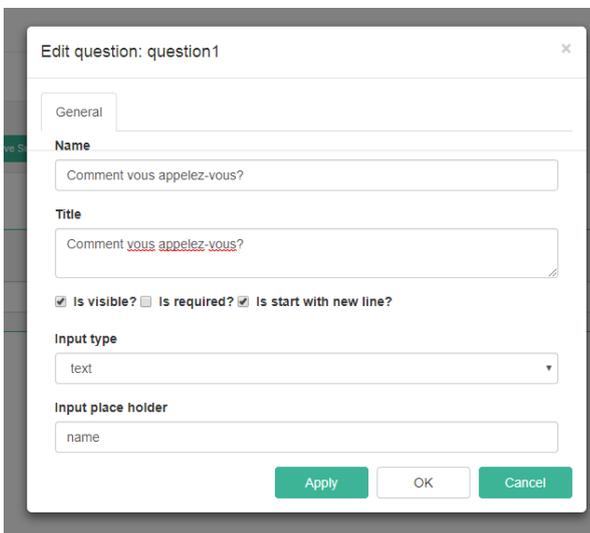
The next step is to choose a relevant URL. A useful habit to get into could be to use a shortened version of the survey name with the language on the end as shown below. The URL of the survey needs to be unique and Symphony will validate the text you place here to make sure it does not clash with another Survey in our system.



The screenshot shows the 'Web address' and 'URL' fields. The 'URL' field contains the text 'https://sym-team.symphonystaging.co.uk/surveys/HR-Soc-FR'.

After clicking Save you will be taken to the new Survey editor. Here you will be able to setup a variety of different question types, adding choices, change titles and adding HTML blocks to split up questions and add your own content.

The toolbox on the left-side stores all the different template question types that you can add to your survey. By clicking on the relevant option, a new survey element will be added and you can choose to edit it how you wish. Adding a 'Single Input' textbox will allow respondents to answer with any text they wish, the following screenshot shows the 'edit' popup that appears when you click edit on the right-side of the survey element.

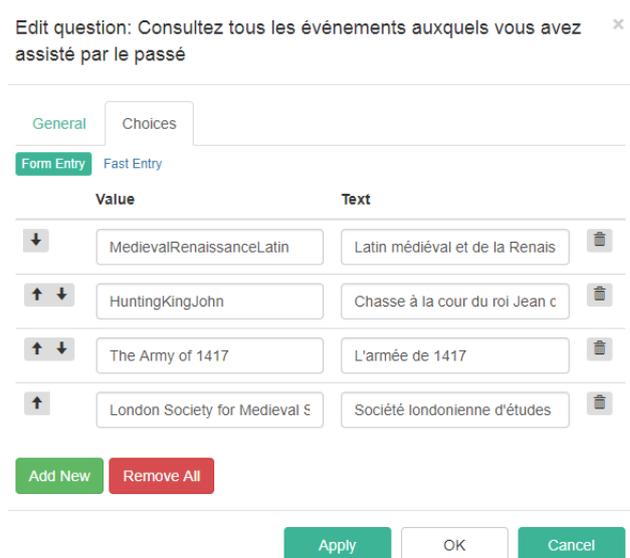


The screenshot shows a 'General' tab in the 'Edit question' popup. The 'Name' field contains 'Comment vous appelez-vous?'. The 'Title' field contains 'Comment vous appelez-vous?'. There are checkboxes for 'Is visible?' (checked), 'Is required?' (unchecked), and 'Is start with new line?' (checked). The 'Input type' is set to 'text'. The 'Input place holder' is set to 'name'. Buttons for 'Apply', 'OK', and 'Cancel' are at the bottom.

Depending on the language you chose earlier in the setup process, you will want to tailor the question text and choices to that particular language. For example, the screenshot shows a translation of 'What is your name?' from English to French. **The survey editor does not translate automatically.**

This popup allows you to define whether or not the question is mandatory or choose a different type of input i.e. date, time, month, email etc.

When adding question types that require a selection of choices, the edit question popup provides a second tab named 'Choices'. This tab has Value and Text fields for each choice. The Text field is what the respondent will see on the survey itself. The Value field is what will be stored into the database when a survey response is completed and submitted. This helps when comparing responses between different language surveys as the value fields can be set the same whereas the Text fields can display in the relevant language.



The screenshot shows the 'Choices' tab in the 'Edit question' popup. The title is 'Consultez tous les événements auxquels vous avez assisté par le passé'. There are two tabs: 'Form Entry' (selected) and 'Fast Entry'. Below is a table with 'Value' and 'Text' columns. Each row has a trash icon to its right.

Value	Text
MedievalRenaissanceLatin	Latin médiéval et de la Renais
HuntingKingJohn	Chasse à la cour du roi Jean c
The Army of 1417	L'armée de 1417
London Society for Medieval S	Société londonienne d'études

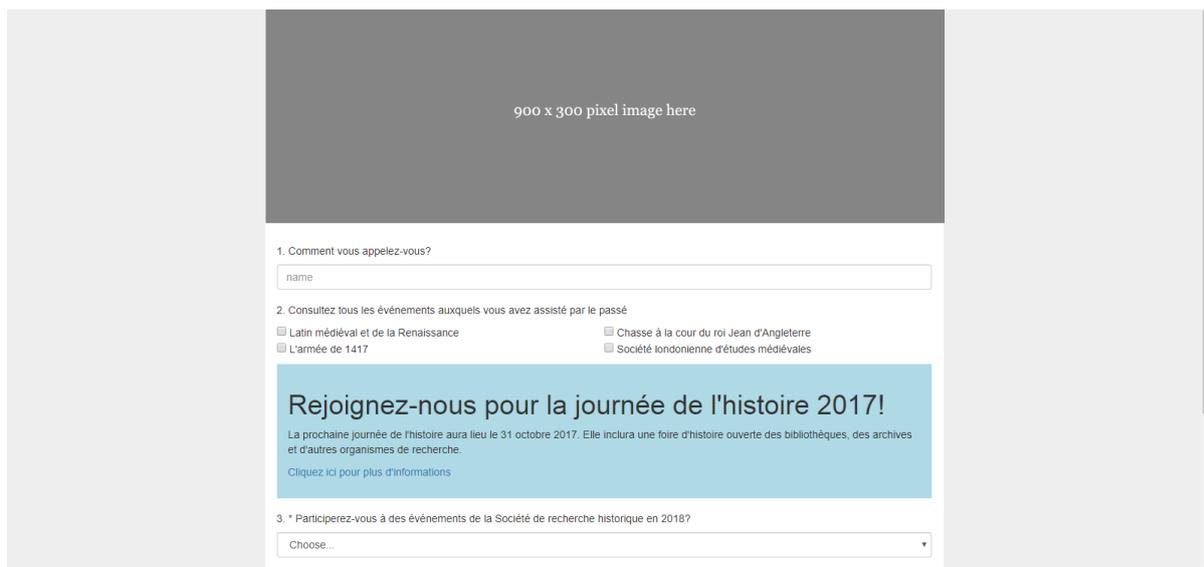
Buttons for 'Add New' and 'Remove All' are below the table. 'Apply', 'OK', and 'Cancel' buttons are at the bottom.

Once you have added a few different questions your survey will quickly begin to take shape, it is advisable to save regularly as no autosave feature is available. Any unwanted changes can later be reverted. Once you have finished adding questions or simply want to see what your survey looks like, click Save at the top of the screen.

The following Overview page gives you an outline of the Survey you have just created. A basic preview is available at the bottom of the page, so you can see how your survey is looking so far – bear in mind this is not how it will appear publicly.



A 'Development URL' is shown on this page, clicking this will take you to a different screen which displays the survey itself and how it will be used by a respondent once sent out. By default, the Development version of the Survey submits test responses. After a short loading period, your survey should appear and look something like the following:



Use this opportunity to complete the survey yourself and test out how a member of the public would experience the survey. Afterwards, you can export the response(s) or edit the survey to add, edit or remove any questions. To export responses for a particular Master Survey, navigate to the Survey List page and click the 'options' button for the survey you would like to review responses for.

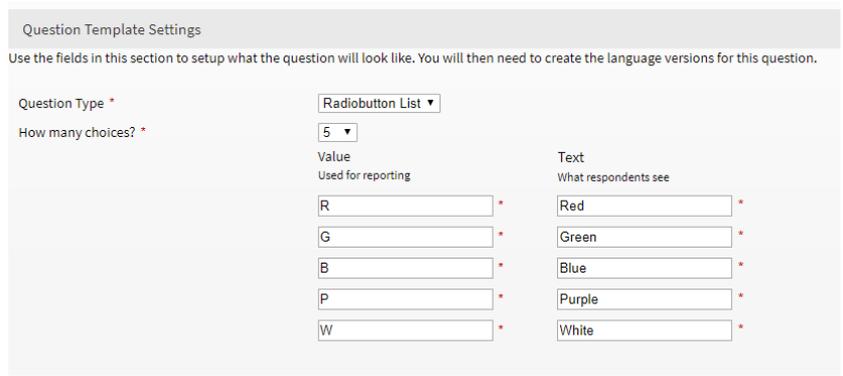
If there are a lot of responses to a survey, please allow for up to a minute for a CSV file to be generated. It should be automatically downloaded once complete. The individual questions on the survey will be turned into column headers and each row of the CSV file will contain the information for each response that survey has received.

How to use Master Questions

Master Questions exist at the same level as Master Surveys; and can be found underneath the Other tab on the main Symphony dashboard. The purpose of a Master Question is to be able to reuse a question across many different surveys. The advantage of this is that you only have to create that question one time, and can then add it freely to any future survey. This also means that answers to this question are the same across different surveys and responses can be pooled and analysed easily.

Once on the Master Question list page, click Add Master Question to begin the setup. The following page allows you to setup the basic details for this question. These basic details act as a template for the Master Question, as the second step of the process is to define the different language versions.

The question types that form as lists like Checkbox list, dropdown list and radiobutton list all allow the admin 1-10 different choices. The same as the questions in the Survey Editor, the Value field contains the data that will be stored in the Survey Response when a survey is completed by someone. The Text field is what will be displayed in the question dropdown for example, the public-facing information on the survey.



Question Template Settings	
Use the fields in this section to setup what the question will look like. You will then need to create the language versions for this question.	
Question Type *	Radiobutton List
How many choices? *	5
Value Used for reporting	Text What respondents see
R	Red
G	Green
B	Blue
P	Purple
W	White

Once saved, Symphony will automatically create an English version of the Master Question from the information you have entered thus far. If you click 'edit' on the Language shown on the Overview you will see after clicking Save you will see the information for that Master Question Language. To add more version of this question, click 'Add Language' on the right-side of the page to summon a popup which allows you to choose a language and fill-in the options. This box allows you to define new question text and new text for each of the choices you previously defined, tailoring the version for the specific language. This screenshot demonstrates a translation of the question shown in the previous screenshot.

Value	Text*
R	Rouge
G	vert
B	bleu
P	violet
W	blanc

Once you have added the languages you will not be able to edit the overriding Master Question.

To use these Master Questions on your survey, return to the survey list page and access the survey you wish to add the question too. The Edit Content button will take you back to the Survey Editor.

Under the Toolbox section of the survey editor you will notice there is now another option. Master Questions Languages will automatically filter into the toolbox once they have been created. A Master Question will only appear in the toolbox if the language selected matches that of the survey you are creating – if you are creating a French survey, make sure you create French questions.

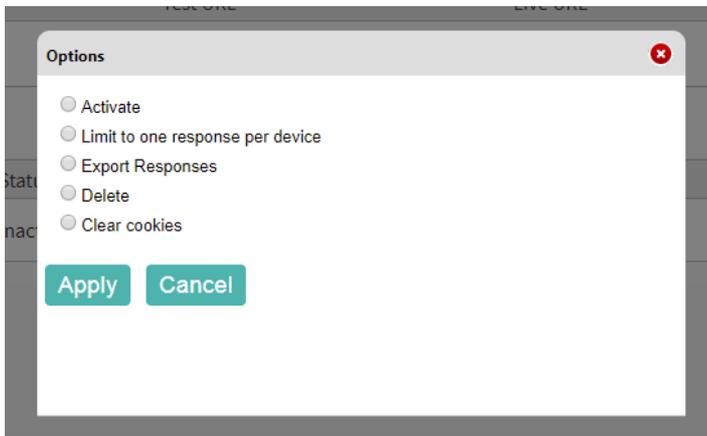
Once added, Master Questions cannot be edited the same way as normal questions.

Surveys and Events

Surveys at an Event level can be found by using the side navigation under the Web/Forms section or by navigating through Event > Event Setup > Surveys. Event specific surveys are one-off surveys that cannot be used across different events. Master surveys can also be attached to an event as seen on the second table on the Survey List page. To add a survey, click the Add Survey button and choose the relevant option.

I. Master Surveys used on this Event

If you have attached your master survey to this event, you will not be able to edit the survey from this point. To edit a master survey, return to the main screen under the Other tab on the dashboard. There are some options on these Master Surveys at this level, which can be found under the options link on the 'Master Surveys used on this Event' table on each row.



Activate/Deactivate: These options will swap the status of the current survey. An inactive survey's live URL will be closed to all respondents, but the development/test URL will remain open for admin use. **Limit to one response per device:** This option will limit the live survey to one response per device. **Export Responses:** This will produce a CSV file with all questions and existing Test/Live responses. **Delete:** This will delete the link

between the master survey and this event. This will mean the existing test/live links for this survey will no longer work. It will not delete the master survey itself. **Clear cookies:** This option can be used to test the one response limit option on the live survey if an admin would like to test the survey a few times.

It's worth noting that the Master Surveys used on this event rely on the Master Survey itself having a Live URL and being active. These settings can be adjusted from the Master Survey section.

II. Event Specific Surveys

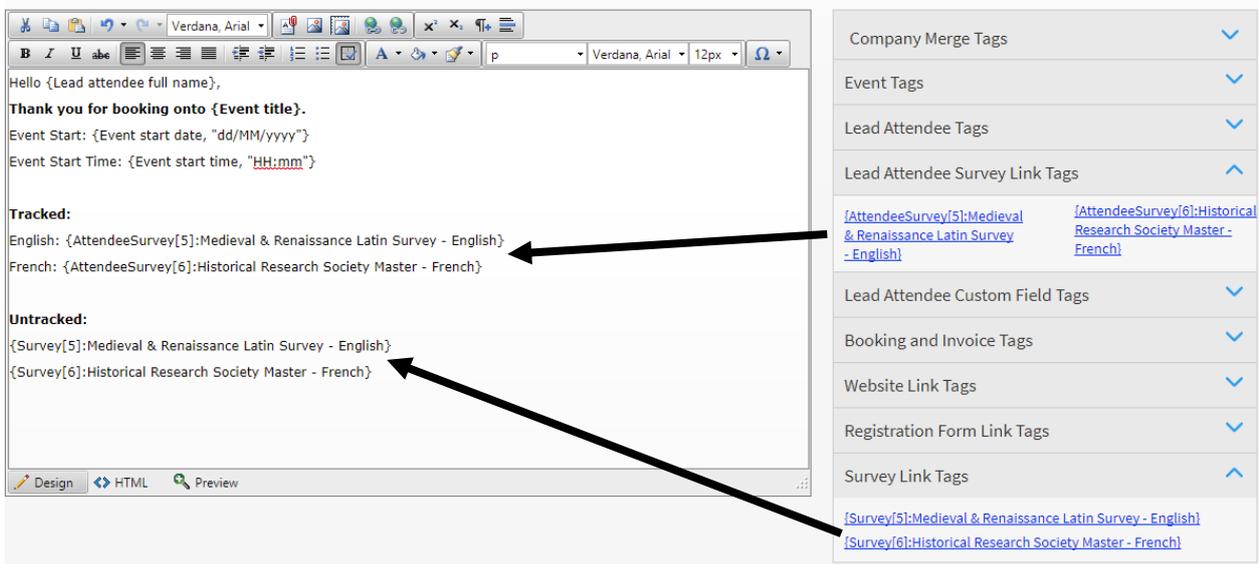
The setup for these surveys is the same as Master Surveys. Master Questions can be used on the event specific surveys in the same way.

Tracking Attendee/Campaign Email Recipient Responses

In order to track attendee or campaign email recipient survey responses, you will need to use the provided merge tags on the campaign emails and trigger emails. The merge tag lists will only pull through live links to surveys; so, if there are no survey links in the merge tag boxes, make sure your surveys have been published via the Survey Overview page.

I. Trigger Email Merge Tags

There are two types of merge tags for survey links under trigger emails. The first is able to track the responses by the attendee ID. This means that when you export responses, the survey response will also contain the attendee ID and you will be able to see who has responded with what. This information can also be found under the attendee details page. The second type of merge tag is the same link, but it does not track the attendee.



The screenshot displays an email editor interface. On the left, the email content is shown with several merge tags. On the right, a sidebar lists various merge tag categories. Two black arrows point from the 'Tracked' and 'Untracked' sections of the email content to the corresponding survey links in the 'Lead Attendee Survey Link Tags' section of the sidebar.

Tracked:
English: {AttendeeSurvey[5]:Medieval & Renaissance Latin Survey - English}
French: {AttendeeSurvey[6]:Historical Research Society Master - French}

Untracked:
{Survey[5]:Medieval & Renaissance Latin Survey - English}
{Survey[6]:Historical Research Society Master - French}

Lead Attendee Survey Link Tags:
[\[AttendeeSurvey\[5\]:Medieval & Renaissance Latin Survey - English\]](#) [\[AttendeeSurvey\[6\]:Historical Research Society Master - French\]](#)

II. Campaign Email Merge Tags

Campaign Emails are also able to track survey responses. The survey merge tags available on the email campaigns are tracked by default, however, there are three different options: Text, URL and Button.

As shown below, the merge tags are replaced by different pieces of content in the actual email.

- {Survey[5]:Medieval & Renaissance Latin Survey - English}

[Click here to take our survey](https://sym-team.symphonystaging.co.uk/surveys/MedievalRenaissanceLatinSurvey/?eventId=15640&recipientKey=bPtNxNK7s6Hk6i4k6AXDhCleyf9vrakhQldUHqxtXZeK6mgHq6BLtI5k1DEPOkvz) or copy the link <https://sym-team.symphonystaging.co.uk/surveys/MedievalRenaissanceLatinSurvey/?eventId=15640&recipientKey=bPtNxNK7s6Hk6i4k6AXDhCleyf9vrakhQldUHqxtXZeK6mgHq6BLtI5k1DEPOkvz> into your web browser.

- {SurveyUrl[5]:Medieval & Renaissance Latin Survey - English}

<https://sym-team.symphonystaging.co.uk/surveys/MedievalRenaissanceLatinSurvey/?eventId=15640&recipientKey=bPtNxNK7s6Hk6i4k6AXDhCleyf9vrakhQldUHqxtXZeK6mgHq6BLtI5k1DEPOkvz>

- {SurveyButton[5]:Medieval & Renaissance Latin Survey - English}

Take Survey

The recipient responses to surveys can be found underneath the recipient results tab, accessible via the campaign email overview page, once the campaign has been sent.



