



Sharing and Collaboration

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Sharing and Collaboration

Surveyi would like to make it as easy as possible for people to work together as teams on their surveys. While it is possible for multiple users to log onto Surveyi using the same account, it will potentially cause problems where people are editing the same survey at the same time, or updating filters which are saved on a per user basis. To have your own user area and the tools to work together on the same surveys we introduced the **Surveyi buddy system**.

The survey buddy system enables teams to work together, share data, surveys, contacts, survey templates, email templates and more.

Becoming Buddies

To become buddies with another Surveyi user you first need to find out their Surveyi user name. When you have this click on the Contacts icon on the Surveyi user menu which appears when you click on **My Surveyi**:

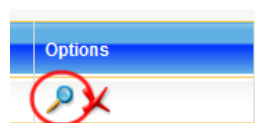


This takes you to the contacts page where you can manage all of your Surveyi contact lists. At the bottom of the page you will find the **Add Buddy** button. Click this to view the Add a Buddy page, and type the username of the buddy you would like to add into the **User name** box. You will be informed if they are found after you click the **Search** button. To save the buddy request click **Save** and at this point your Surveyi buddy will be sent an email with the details of your request. They will also see an alert on their **My Surveyi** home page with a link to accept or reject your invitation.

Once your buddy invitation has been accepted, your new Surveyi buddy will appear in your buddy list at the bottom of the contacts page, and you will also appear on their contact list.

Choosing Shared Content from your Buddy

Once you are buddied up with another Surveyi user, their content can appear as options available to use, view and copy in various places in your Surveyi profile. You can see what each buddy has shared click on the **View Shared Items** icon in your buddy list:



This directs you to the **Buddy Options** page where you can see all of the items which this buddy has shared. You may find that some of the content they have shared is useful to you, while some isn't. The tick boxes at the top of the page are a way of choosing which shared elements you want to be available to you. Make your selections and click **Save** to for the changes to be reflected in your profile.

Sharing your Content

There are several types of content you can share with your Surveyi buddies and some you can share with those who aren't even registered with Surveyi. Below is a guide on each and how to share it.

Surveys

To share a survey, view the survey you would like to edit from your **My Surveyi** home page. From there click on the **Share icon**:



There are several ways to share your survey:

Survey Preview Link: You can share a survey preview link which you can email to people who you would like to view your survey for review purposes, without being able to use it to submit a response. This option is here because you may need to have your survey reviewed by those who do not have time to register with Surveyi themselves, or they may have a free account without access to the Surveyi buddy system.

To use the survey preview link, copy and paste the text from the **Preview address** text box into an email to those you want to share your survey with. Remember not to confuse this with actual response collection, as this will not work via preview links.

Share with Survey Buddies: There are three options for sharing your survey with your Surveyi buddies:

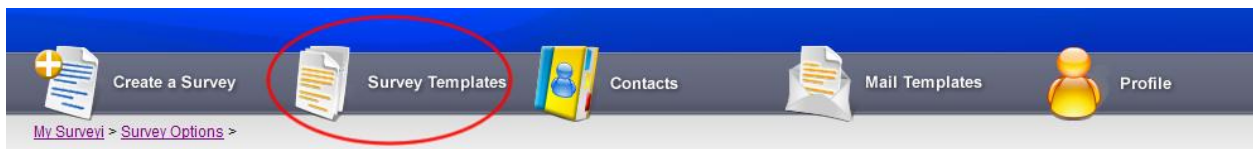
- **Do not share this survey with buddies.**
- **Share preview and results only** – lets your Surveyi buddies see your preview page, and view your results in the same way you can.
- **Full sharing, allowing buddies to edit this survey** – gives your buddies full access to everything within your survey including editing privileges.

Transfer Ownership: If you no longer have responsibility for this survey you can transfer ownership of it to any of your Surveyi buddies. You will no longer be able to edit the survey after you transfer it unless your buddy has shared it with full access. If you want your survey back again you will need to request that your buddy transfers it back to you.

Share Individual Questions: If you have a particularly useful question which you feel your Surveyi buddies could benefit from using you can share it by clicking on the **Share/Unshare icon** for that question. All questions for this survey are listed in the question list. The shared state of the question is indicated with a blue tick or cross correspondingly.

Survey Templates

To share survey templates click on the **Survey Templates** icon from the menu which appears when you click on **My Surveyi**:



If you have any survey templates in the list, just click the Share/Unshare icon in the options column to the right, and the template will be shared. This is indicated by a blue tick or cross in the Shared column.

Mail Templates

To share mail templates click on the **Mail Templates** icon from the menu which appears when you click on **My Surveyi**:



If you have any mail templates in the list just click on the Share/Unshare icon in the options column to the right and the templates will be shared. This is indicated by a blue tick or cross in the Shared column.

Contact Lists

To share contact lists click on the **Contacts** icon from the menu which appears when you click on **My Surveyi**:



If you have any contact lists in the list just click on the Share/Unshare icon in the options column to the right and the templates will be shared. This is indicated by a blue tick or cross in the Shared column.