Polling, Survey, and Social Q&A: Quick Guide

This document is a guide to setting up and using “Polling, Survey, and Social Q&A” in Certain. The product is a sub-module of the Mobile Module. To use it in an event, you should also be using:

1. **Mobile**, for attendees to answer poll and survey questions, and to engage in social Q&A;
2. **Speaker and Session Management**, for speakers to manage audience interaction at their sessions, using the online **Speaker Event View** (speaker portal).

The **Polling, Survey, and Social Q&A** product is not enabled in an account by default, but if after reading this document you’re interested in using it, please email features@certain.com, including your account name.

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Enabling the Product in an Event

Enabling Polling, Survey, and Social Q&A

1. In the event, go to Plan > Configure > Options > Functional Areas Needed by This Event.
2. Select the Mobile Module, if not already selected.
3. Under that, select Polling, Survey, and Social Q&A.

Warning:

If Polls, Surveys and Social Q&A is enabled for an account, and an Administrator subsequently clears that check box (in Account Settings > Implementation > Products), that will delete all Polls, Surveys and Social Q&A data in all events in that account.

Similarly, if it is enabled for an event, and a planner subsequently clears that check box (in Plan > Configure > Options), that will delete all Polls, Surveys and Social Q&A data in that event.

Enabling Other Modules

Session and Speaker Management
Session and Speaker Management is required so that you can add the sessions, speakers, and session evaluation questions.

You will probably have enabled this module (and even added data in it) well before enabling Polling, Survey, and Social Q&A, but the steps are included here for reference.

As explained in the separate Speaker and Session Management quick guide:

1. In the event, go to Plan > Configure > Options > Functional Areas Needed by This Event.
2. Select the Speaker and Session Management Module.

Note: Once you have added any data to the Speaker and Session Management module, such as event tracks or sessions, then you cannot change your mind and deselect the module for the event.

Speaker Event View
Speaker Event View is required so that you can add and configure the Speaker Event View (speaker portal) in which speakers will manage Polling, Survey, and Social Q&A for their sessions.

As explained in the separate Speaker and Session Management quick guide:

1. In the event, go to Plan > Configure > Options > Functional Areas Needed by This Event.
2. Select the Event Views Module, and then under that the Speaker Event View option.
Mobile

Mobile is required so that you can configure the mobile app in which attendees will complete polls and surveys, and participate in Social Q&A.

As explained in the separate Certain Mobile quick guide:

1. In the event, go to Plan > Configure > Options > Functional Areas Needed by This Event.
2. Select the Mobile Module, if not already selected, and then under that the Mobile option.

Event Builder Workflow

Add a Speaker Event View

Speakers use the online Speaker Event View to manage their session. Each event can have just one speaker event view.

If your event does not already have one, go to Engage > Event Views, click Add New, and select Speaker Event View when prompted for the type. Then configure it as explained in the separate Speaker and Session Management Quick Guide, and in the online help.

Add Session Evaluation Questions

The event builder creates evaluation questions at the event level. Speakers at different sessions all use the same set of questions (via the Speaker Event View), but can enable or disable their use for their own session.

Go to Plan > Event Setup > Evaluations to add and edit questions; you can have as many as you like in an event. As explained in the online help for that page, click Manage Evaluation Questions, and then Create an Evaluation Question. Enter the details, and then click Create to save the question.

- Content/text of the Question – The question itself, e.g. "Rate the content of the session on a scale from 0 to 5".
- Extended Content (optional) – Further detail of the question, displayed to attendees in much smaller print below the question itself.
- Type of Question – Select one of the four types:
  - Multiple Choice: Enter text for up to seven options, and select the Number of User Responses Allowed – either Just One or Mark All That Apply.
  - Short Answer
  - Long Answer
  - Numerical Average – Enter the start and end of the range of numbers as First Response Value (e.g. 0) and Last Response Value (e.g. 5).

Speakers can enable questions for their own sessions, usually at the end of the session; see page 10.
But you can choose to have them enabled automatically before sessions end, instead. Click Change Evaluation Settings, and choose evaluations to be unlocked 3, 5, 10 or 15 minutes before the end of a session.

Export Data (after the event)
To export Polling, Survey, and Social Q&A data after the event is over, go to Plan > Event Setup > Evaluations (the same page on which you created evaluation questions – see above).

There are two options on that page for you to export data: Export Evaluations and Polls and Social Q&A Data (XLS Spreadsheet), as explained next.

1. Export Evaluations
   Opens an Excel spreadsheet, with consolidated results for all Session Evaluation Questions across all sessions.

2. Polls and Social Q&A Data (XLS Spreadsheet)
   Opens an Excel spreadsheet, with these results:
   - **Polls**: One worksheet (tab), consolidating attendees’ answers across all sessions.
   - **Social Q&A**: One worksheet (tab), consolidating Social Q&A questions across all sessions.
     For each session, it lists the questions; and for each one, details such as the attendee that asked it, how many upvotes it received, and the speaker’s answer if they typed one.

Speaker Workflow
These are the steps the speaker follows for their session at the event.

My Sessions
1. Open the Speaker Event View on their mobile device, and log in by entering their Username and Password.
2. Tap My Sessions, and then the name of the session they are presenting.
3. On the session’s page, below the details, tap Manage Session Polling, Survey and Q&A.
4. To enable and disable features for the session, view or manage a presentation, or export session data, tap Session Settings.
5. The Session Management page opens, as explained and illustrated next.
Session Management

6. The **Session Management** page has these two sections, as illustrated and explained below:
   - Session Settings (see page 6)
   - Export (see page 10)

### Session Management

**Go Back**

**Session Settings**
- Enable/Disable Features
- Reorder Polls

**Export**
- Session Report (HTML)
- Polls and Social Q&A Data (XLS)
Session Settings

- **Enable/Disable Features**
  Four features are listed: Social Q&A (and Q&A Filter), Polls, and Session Evaluation.

  If a feature is disabled, click its closed padlock icon to enable it.

  If it’s enabled, click its open padlock icon to disable it.

  Each feature is described below (page 6 – 10).

- **Reorder Polls**
  The speaker can change the order in which poll questions are displayed, by dragging them up and down the list.

**Export**

The two exports are for the speaker to use after the session – see page 10.

**Speaker: Managing Social Q&A**

Speakers can use **Social Q&A** to facilitate audience Q&A sessions more efficiently.

Audience members ask and vote for questions in real time, right from their mobile devices in the Certain Mobile app. The questions appear there, and for the speaker on the Speaker Event View, in real time, reordered based on the number of votes.

This is ideal for moderated sessions in particular. When it’s time for Q&A, the moderator knows all the questions the audience has, and which are the most important to address.
The speaker enables Social Q&A in their session by going to Enable/Disable Features (see page 6) and clicking the lock icon next to Social Q&A. The icon changes to unlocked, showing that the feature is enabled:

![Features](image)

**Q&A Filter**
The speaker has the option of requiring that he or she approve each question submitted before it becomes visible to attendees.

This is called the Q&A Filter, and is disabled by default. To enable it, the speaker taps the lock icon next to the Q&A Filter label. That icon changes to unlocked, showing the feature is enabled:

![Social Q&A and Q&A Filter](image)

When the Q&A Filter is enabled, the questions that attendees submit do not appear in the app until the speaker approves them by tapping the plus-sign icon:

![Social Q&A and Q&A Filter](image)

Until then, while a question is waiting for approval it is visible only to the speaker, in the Speaker Event View.

**Responding to Questions**
In responding to a question, the speaker taps the relevant icon next to it:
Marking the question 'complete' once addressed. It then disappears from the Attendees’ Q&A list in the mobile app.

Deleting the question permanently (for example, because it’s personal or off-topic). It disappears from the Attendees’ Q&A list in the mobile app.

Marks the question as a "favorite", reminding the speaker to answer it.

If a question doesn’t need a detailed answer, the speaker can tap it and type a quick response; attendees can then see the answer next to the question in the mobile app.

**Speaker: Managing Polls**

Polling enables a speaker to poll their audience on a question or topic, and to see the results graphically, in real time.

The speaker enables polling in their session by going to **Enable/Disable Features** (see page 6) and clicking the lock icon next to **Polls**. The icon changes to unlocked, showing that the feature is enabled.

The session page then include a **Polls** section, where the speaker clicks **Create** to add a new poll (i.e. a question for the audience). The speaker enters the details of the poll as follows, much the same as an event builder does for Session Evaluation Questions (see page 3):

- **Poll Name/Title**, and an optional **Extended Description**.
- **Type of Poll** –
  - Multiple Choice,
  - Open Ended / Short Answer, or
  - Numerical Average.
• For Multiple Choice polls only: **Number of User Responses Allowed** –
  o Just One, or
  o Mark All that Apply

• For Numerical Average polls only: a range of whole-number anchor points:
  o First Response Value (e.g. 1), and
  o Last Response Value (e.g. 10)

  **Note:** By default, the mobile app produces a list of options for attendees to choose from, but when there are more than 10 possible responses, attendees are prompted to type their choice in a text field.

• **Results Format** –
  o For Multiple Choice polls:
    ▪ Pie Chart, or
    ▪ Bar Chart
  o For Open Ended / Short Answer polls:
    ▪ Cloud (better for short answers), or
    ▪ List (better for long answers)

• **Public Visibility of Results** –
  o Audience Can See Results, or
  o Audience CANNOT See Results

A new poll is “**locked**” by default, so attendees cannot see it or respond to it. When the speaker is ready for the audience to respond to a poll question, they click the unlock icon next to the poll. The poll is then visible to the attendees, in the Mobile app, where attendees can tap it in order to give their responses. If the speaker selected visibility as **Audience can See Results**, then when an attendee responds to the poll they see the graphical results, which are updated in real time as new results come in.
Speaker: Managing Session Evaluations

If an event builder has added Session Evaluation Questions to the event (see page 3), then a speaker can make them available to the attendees in their session by going to Enable/Disable Features (see page 6) on that session page in the Speaker Event View, and clicking the lock icon next to Session Evaluation. The icon changes to being unlocked, showing that the feature is enabled:

There is nothing more for the speaker to do.

Note: If the event builder has chosen for evaluations to be unlocked automatically a number of minutes before a session ends (as explained on page 4), then the speaker does not have to unlock them at all.

An attendee answers the evaluation questions by following these steps:

1. Tap the session on their My Calendar page in the Mobile app
2. Tap Polling, Survey and Q & A
3. Tap Evaluate This Session
4. Respond to the first question, and tap Next
5. Respond to each of the remaining questions, tapping Next after each one

Speaker: Exporting Data

When a speaker goes to Session Settings for their session (see page 6), they have these two options to see or download their data:

Session Report (HTML) and Polls and Social Q&A Data (XLS), which are described overleaf.
1. **Session Report (HTML):**
   Displays a summary of Poll results, using the formats specified with the questions: see page 8.

2. **Polls and Social Q&A Data (XLS)**
   Opens an Excel spreadsheet, with these results:
   - **Polls:** One worksheet (tab) for each poll question, with one row per answer, showing the number of votes and the percentage it represents.
   - **Social Q&A:** One worksheet, with one row per question asked during Social Q&A. For each question, shows who asked it and when, how many upvotes, whether saved or completed, and the speaker’s answer if they typed one.