How to Combine Data from Workflow Steps Into One Report

Using multiple small surveys, instead of a single long survey, allows users to engage with respondents in a conversation, but also splits response information across multiple data sets. At times, users need to piece these back together and incorporate information pulled from other systems into a workflow.

In Alchemer Workflow, customers can use merge codes as default answers to add all relevant information from the workflow to the specific survey where you'd like the summary report to be generated, also known as "the summary survey". The summary survey would generally be the last survey in your workflow.
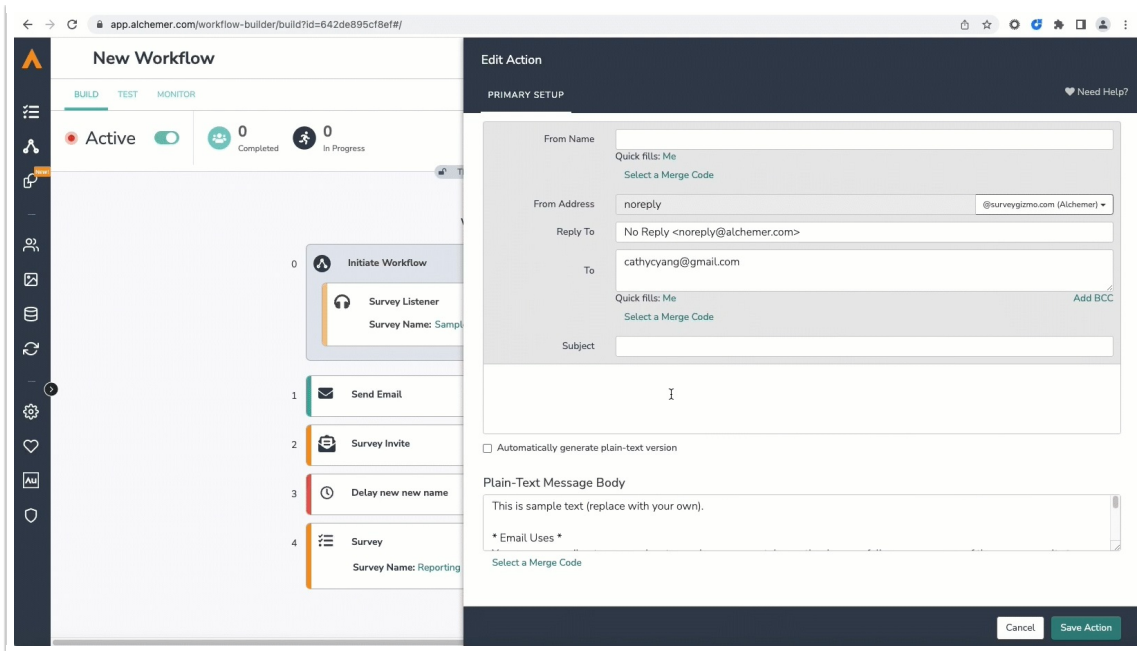
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In the survey builder for your chosen summary survey:

1. On a new page, add the questions from other surveys in your workflow that you would like included in a summary report.

2. In the Layout tab of each question, input the workflow merge code from the corresponding question in previous surveys as the Default Answer. Note, this merge code is not automatically available via the merge code selector, thus you must identify the correct merge code from your workflow first.

3. Set the page, with the copied questions, to automatically submit, so the default answers will be used without the respondent seeing the page.

You can now generate a report for the summary survey that contains the responses from the previous surveys.

For more details on setting up finding and using merge codes, go to this article.

Limitations

It can be time consuming to build out the summary survey, but this only needs to be done once per workflow or per consolidated report in the workflow.

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