

SYMPHONY

OPTIMIZING YOUR WORKSPACE ON SYMPHONY

START WITH YOUR LAYOUT

You can customize how dense you want your Symphony workspace via text size and the number of pinned chats. Though it depends on your personal preference, best practices follow below:

TEXT SIZE

Adjusting the text size parameters can help save or expand screen real estate. You can adjust text size, spacing between chats, and time stamp granularity

	Sales & Trading <i>Dense, info rich layouts that display time stamp in seconds</i>	Operations, Research <i>Info rich layouts with slightly more visual space, indicates 'time ago'</i>	IT/Tech, Corporate Functions, etc. <i>More general-purpose chats</i>
Goal	Allow max number of chats and provide a view of client inquiries at the seconds-level	Allow navigation between multiple internal rooms while being responsive to external	Provide a general purpose chat experience that's easier on the eyes
Font Size	Small	Small	Normal
Info Density	Condensed	Condensed	Spacious
Time Format	24 hour with seconds	Standard 'time ago'	Standard 'time ago'

To adjust these settings in Symphony, simply click on the 'Settings' gear at top-right, then General, then the labeled category on the page.

MULTIPLE CHATS ON YOUR WORKSPACE

Create a workspace that allows you to stay updated on key chats like an info feed while interchanging less regular chats, or choose to focus on particular topics by pinning chats

- **We recommend you always keep at least 2 chats/ rooms vertically open.** On the right, pin a popular chat that is critical you stay updated on or respond quickly to. By keeping this pinned, you will receive a real-time feed of new messages. On the left, allow new messages to be read interchangeably, by clicking on the unread notification and choosing not to pin this to your grid
- **Pro-Tip for Sales & Trading,** we recommend keeping more than 2 chats open: a macro/ research room, your desk / flow room, and the remaining, client chats. Keep client chats on the same side so you can visually distinguish between internal/ external

Pin the chat you wish to keep fixed to your screen by mousing over the top of the chat, and click on the pin icon at the top right. Once highlighted in green, the chat will stay fixed on your screen. To unpin, just click the pin so it turns gray again

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THEN DEFINE AND ADJUST YOUR FOLDERS

Since Symphony enables internal and external communication depending on firm policy, you can acquire many chats. Folders are critical to fast response times and keeping your workflow organized.

FOLDER ORGANIZATION

Group related chats into a folder to keep your left navigation clean and organized. You may choose to organize your folders based on content type, clients, or specific projects

- **Segment folders by internal and external**, placing external client coverage chats into a folder distinct from internal team/ project / market news rooms. This enables you to keep your eye on external client activity and respond more quickly. We recommend labeling EXT: [Subject Matter] or INT: [Subject Matter] so you can visually distinguish them on the left nav
- **Place chats into critical or informational folders.** For chats that have time sensitive content, place them in the critical folders. You may have multiple critical folders – ones for Clients or Market Color – which is definitely ok. For content not tied to a strict time schedule, place these into the Informational folders. Examples of these types of chats may be Corporate Updates, Long-Term Projects, or chats with friendly colleagues
- **Create a VIP Folder for your boss or other senior leaders**, quickly notifying you when they ping
- **For Sales & Trading and Research Groups especially, separate out internal content and research into its own folder to keep everything together.** Keeping an 'INT: Research and Market Color' folder will help you assign various sector, asset-class or other market-based chats together
- **Follow similar practices as you would for your email inbox.** The folder concept is similar to those in your email, and if you have a preferred structure or organizational hierarchy, don't reinvent the wheel - duplicate that in Symphony

To create a folder, click the "+" sign to the right of Chats on your left nav and name your folder. You can then drag chats into the folder, or click on the three dots next to a chat and then "move to folder"

KEEPING NEW CHATS ORGANIZED

As more chats get created, you will have new chats that are not yet assigned to folders. These chats will appear at the bottom of your folders, in chronological order of the notification

- **Sort chats into the relevant folder as they appear** to keep your left nav organized and relevant topics together in the same folder
- **Remove the chat from your left nav if you don't want to keep the chat in a folder** (mouse over the chat on the left nav and click 'x'). All chats are persistent so you can always pull it up in search if you ever need to refer back to it

To move a chat into a folder, mouse over the chat, click on the three dots icon, and then move to the desired folder