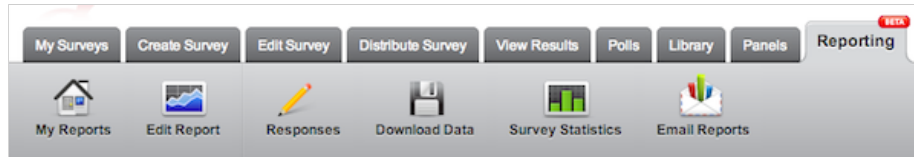


About Reporting

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Introduction

Reporting Beta is the innovative new Research Suite reporting tool, combining all the best aspects of [View Reports](#) with useful new features like multiple data sources and advanced customization.



Worried that you won't be able to do everything in Reporting Beta that you could with View Reports? We've got you covered. Reporting Beta still has all your favorite features from View Reports like [data filters](#), [cross tabulations](#), scheduled report emails, and exporting.

What's so neat about Reporting Beta? Take a peek at some of these new options:

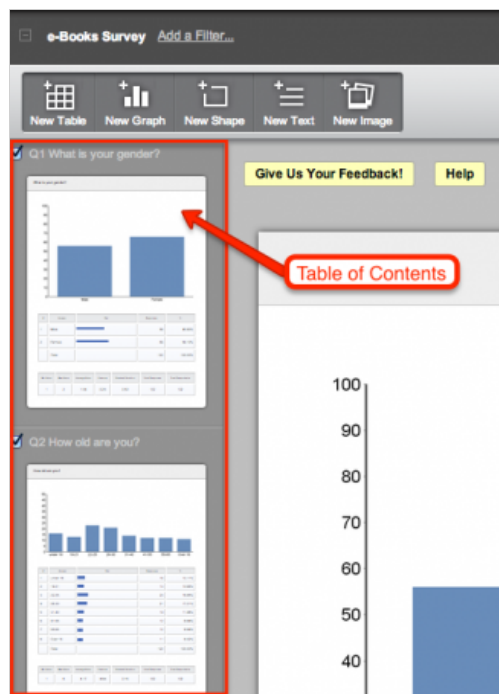
- **More Customization:** Drag, drop, and resize graphs and tables to edit the layout of your report. Try the new graph and table types and add additional tables, graphs, text boxes, images, and shapes.
- **Professional Reports:** Add a cover page with your organization's logo, create background templates, and add and remove pages for a polished, publishable report.
- **Advanced Filtering:** Create filters that include multiple criteria, such as an Embedded Data value, Completion Status, and Survey End Date. Choose exactly which filters should apply to each graph and table.
- **Multiple Data Sources:** Create multiple filters for one survey or compare data from multiple surveys in one report.

Navigating Your Reports

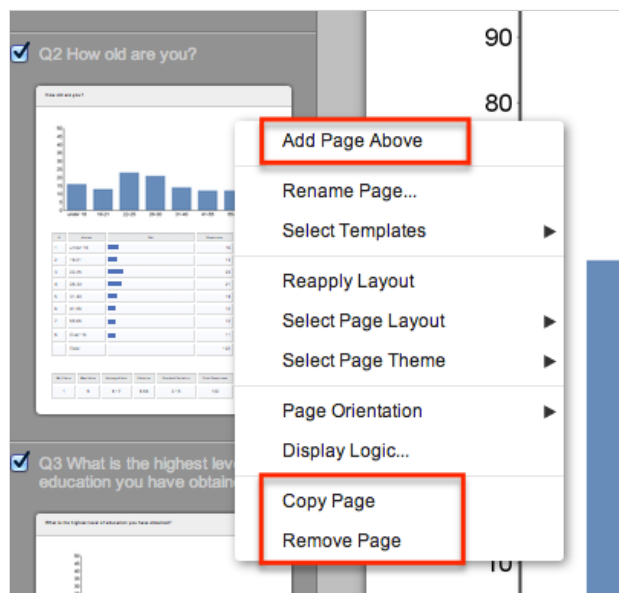
Once you've [Created a New Report](#) in Reporting Beta, learn how to navigate a few important sections of the tool.

Table of Contents

The Table of Contents is located on the left side of your report. Here you can quickly scroll through pages and click to navigate directly to a specific page in the report.

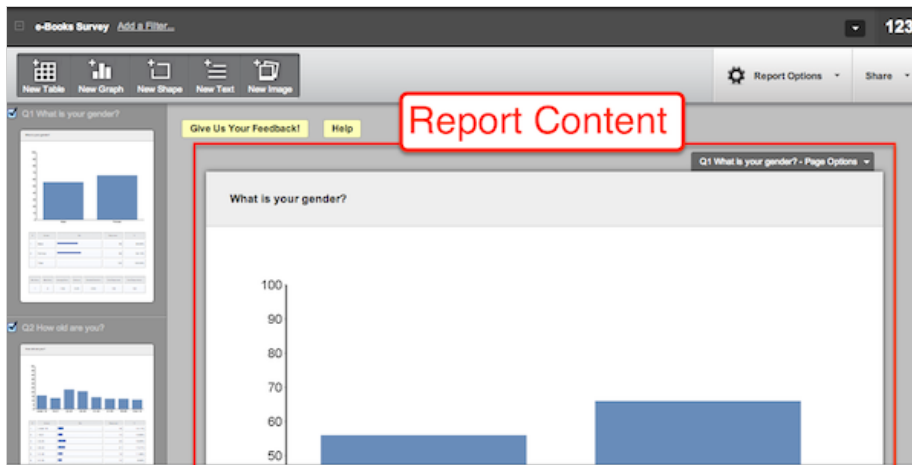


To quickly add, remove, or copy pages in your report, right-click on a page in the Table of Contents. From this menu you can also rename pages, select and apply templates, themes and layouts, change the page orientation, and add [Display Logic](#).



Report Content

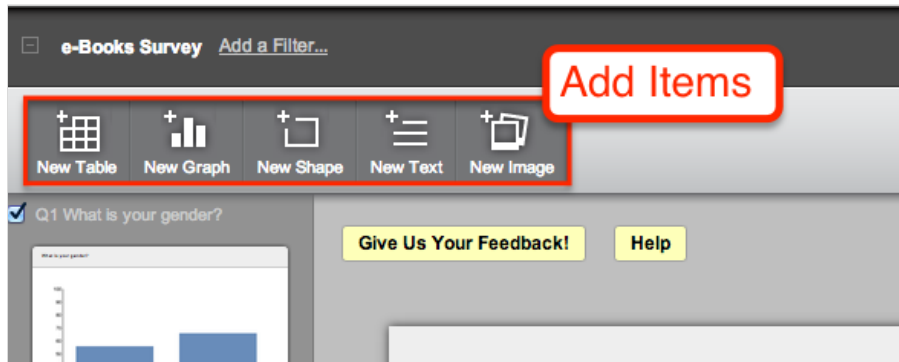
The Main Content of your report is found next to the Table of Contents. This is where you can add, remove, and edit Tables, Graphs, Shapes, Text Boxes, and Images.



Qtip: Quickly resize, move, and edit any of the content in your report with [Shortcuts](#).

Add Items

Use this section to add a new [Table](#) , [Graph](#), [Shape](#), [Text Box](#), or [Image](#) in your report.



Edit Items

Click on a [Table](#) , [Graph](#), [Shape](#), [Text Box](#), or [Image](#) to access the editing menu. Use this section to specify the [Data Source](#) for [Graphs](#) and [Tables](#), change [Table](#) and [Graph](#) types and settings, and customize layout.

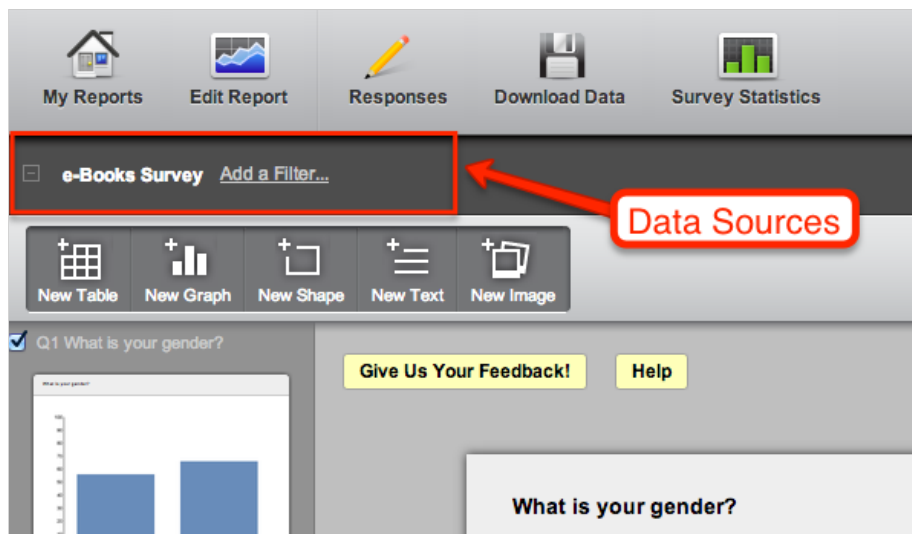
The screenshot shows the 'Edit Items' menu for a table. A red box highlights the menu items: 'Data Source', 'Table Type', 'Table Options', and 'Layout'. A red callout box with the text 'Edit Items' points to the menu. Below the menu, there is a table with the following data:

#	Answer	Bar	Responses	%
1	Male		56	45.90%
2	Female		66	54.10%
	Total		122	100.00%

For more information, see our pages on [Tables](#), [Graphs](#), and [Shapes, Text, and Images](#).

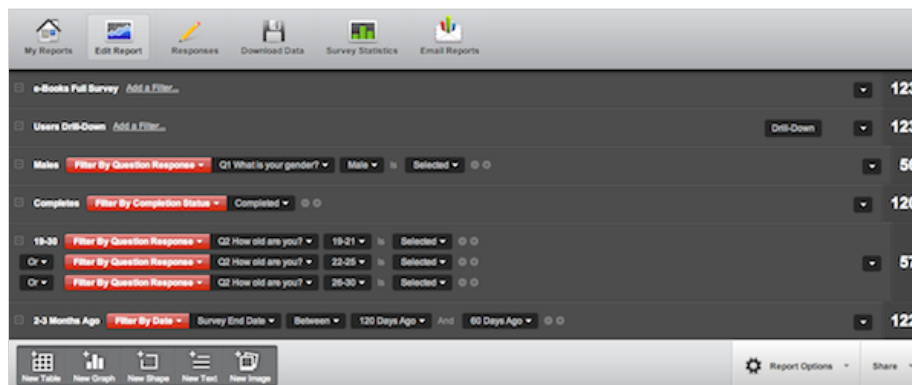
Data Sources

This section displays the different sources of data used in your report. Each new report you create will start with one data source from your initial survey.



Think of a Data Source as a set of data that can be used in any of your charts and graphs. For example, you might have one data source including just respondents who shop at your competitor's location, or another data source including just those respondents who answered in the past week.

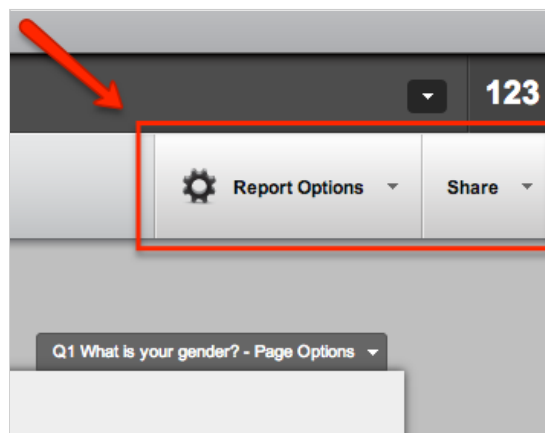
As you build your report, use this section to add and remove data sources from multiple surveys, create advanced filters and Drill-Downs, generate **Time Series data**, and much more.



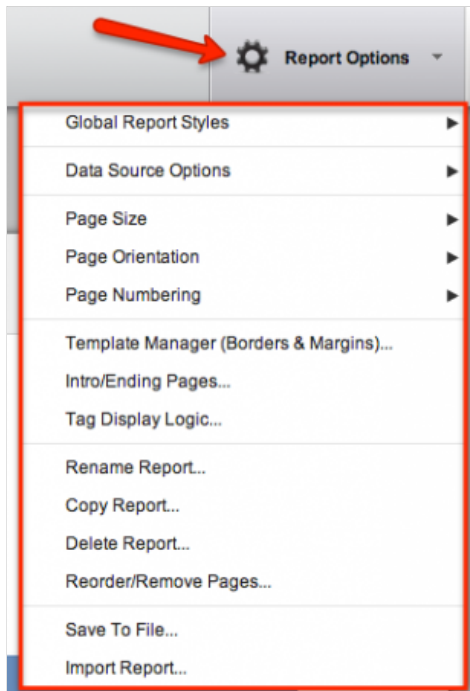
For more information, see our page on [Data Sources and Filters](#).

Report Options and Sharing

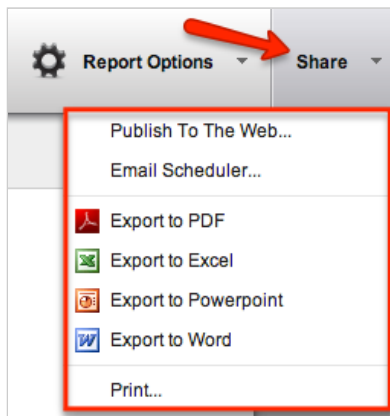
Change the general settings of your report and choose how to export and share your finished product.



Use the Report Options menu to change the font, colors, default table and graph types, and Template of your whole report.



Use the Share menu to publish your report to the web, distribute your report with the Email Scheduler, or export your report to PDF, Excel, PowerPoint, or Word.



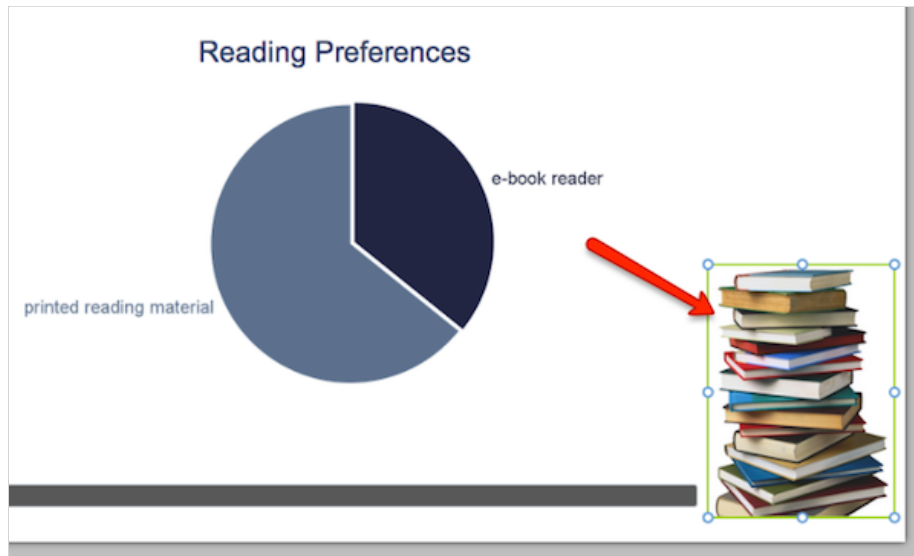
For more information, see [Report Options](#).

Shortcuts

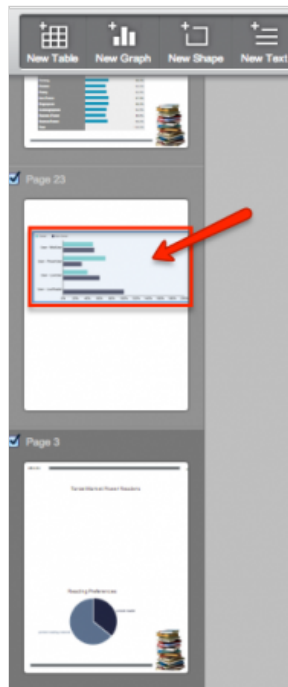
Edit your report quickly and easily with these mouse and keyboard shortcuts!

Moving Items

- To move an item, simply click and drag the item to its new location.



- To move an item across multiple pages, click the item and drag it to the desired page preview in the Table of Contents.



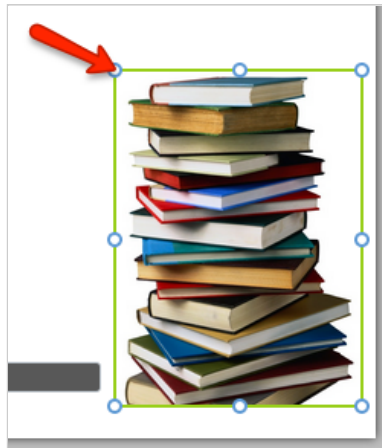
- You can click and drag to move whole pages up and down in the Table of Contents.











- To move items small distances, click the item and use the , , , and  keys on your keyboard.

Resizing Items

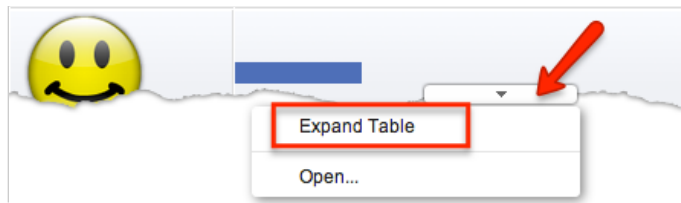
- To resize an item, click the item and then drag the edge or corner.



- If a table is not large enough to show all of the content, it will display as a torn sheet of paper at the bottom.

#	Answer	Bar	Responses	%
1			2	5.56%
2			9	25.00%
3			10	27.78%
4			10	27.78%

- To expand the table, click the drop-down arrow and then click **Expand Table**.



Copying Items

To copy an item in your report, select the item and then hold **CRTL** or **Command** and then press **C**.

Deleting Items

To delete an item in your report, select the item and then press **Delete**.

Grouping Items

To group multiple items in your report together, hold **Shift** and then click each item.

Was this page helpful?

Yes No

On this page you will find:

[Introduction](#)

[Navigating Your Reports](#)

[Shortcuts](#)