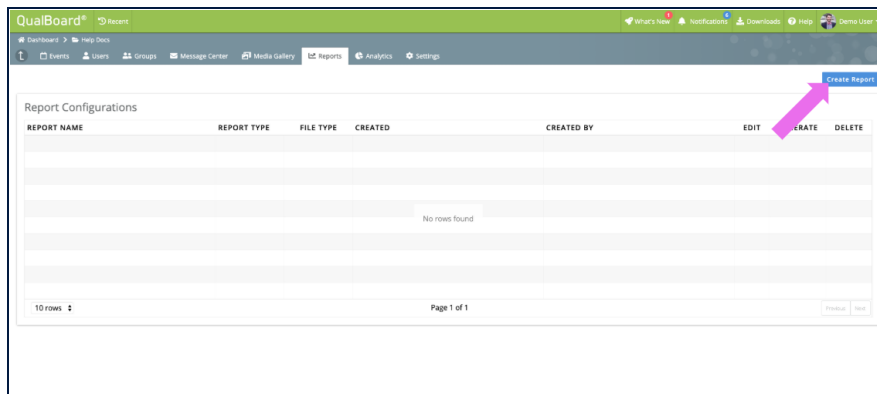


Generating a Report

Last Modified on 06/28/2021 3:23 pm EDT

1 of 8

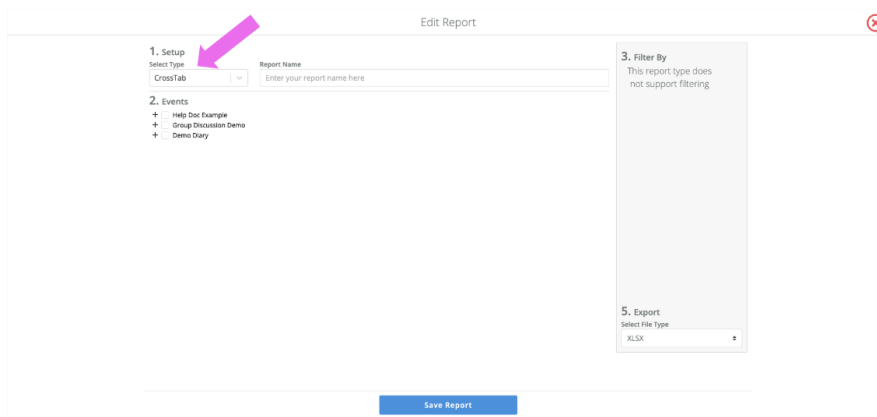
From the Reports tab, click the **Create Report** button to create one link.



You're well on your way! Click **Next** for the next step.

2 of 8

First select your report type. Your options are a Crosstab or Transcript. The Crosstab is only available as an Excel, and the transcript is available as a PDF, DOCX, or Excel.



3 of 8

For either report type, your next step is to choose the events or tasks that you want to include in your transcript.

Edit Report

1. Setup
 Select Type: Crosstab
 Report Name:

2. Events
 + Help Doc Example
 + Group Discussion Demo
 + Demo Diary

3. Filter By
 This report type does not support filtering

5. Export
 Select File Type: XLSX

Save Report

4 of 8

If you are creating a Transcript, you can also add filters for users, group tags, insight tags, and date. **Note** that all of these are additive (example, the user is John AND the date must be in a certain range).

Edit Report

1. Setup
 Select Type: Transcript
 Report Name:

2. Events
 + Help Doc Example
 + Group Discussion Demo
 + Demo Diary

3. Filter By
 Users:
 Group Tags:
 Insight Tags:

4. Include
☐ Group Tags
☐ Insights
☐ Insight Tags
☐ Notices

5. Export
 Select File Type: PDF

Save Report

5 of 8

Finally, in a transcript you can select to show or hide notices and select the format you would like the transcript in. Your options are PDF or Excel.

1. Setup

Select Type

Transcript

Report Name

Enter your report name here

2. Events

+

Help Doc Example

+

Group Discussion Demo

+

Demo Diary

3. Filter By

Users

Filter by user...

Group Tags

Filter by group tag...

Insight Tags

Filter by insight tags...

4. Include

Group Tags

Insights

Insight Tags

Notices

5. Export

Select File Type

PDF

Save Report

6 of 8

Click Save Report at the bottom to create your report configuration.

1. Setup

Select Type

Transcript

Report Name

Enter your report name here

2. Events

+

Help Doc Example

+

Group Discussion Demo

+

Demo Diary

3. Filter By

Users

Filter by user...

Group Tags

Filter by group tag...

Insight Tags

Filter by insight tags...

4. Include

Group Tags

Insights

Insight Tags

Notices

5. Export

Select File Type

PDF

Save Report

7 of 8

Now that your report configuration is saved, click the download icon on the right side to begin downloading the report. If you need to make any edits, simple click the edit icon and save your changes.

QualBoard®

Recent

Dashboard

Help Docs

Events

Users

Groups

Message Center

Media Gallery

Reports

Analytics

Settings

What's New

Notifications

Downloads

Help

Demo User

Create Report

Report Configurations

REPORT NAME	REPORT TYPE	FILE TYPE	CREATED	CREATED BY	EDIT	VERATE	DELETE
Example	Transcript	PDF	1/21/2020 4:20 PM (EST)	Demo User			

10 rows

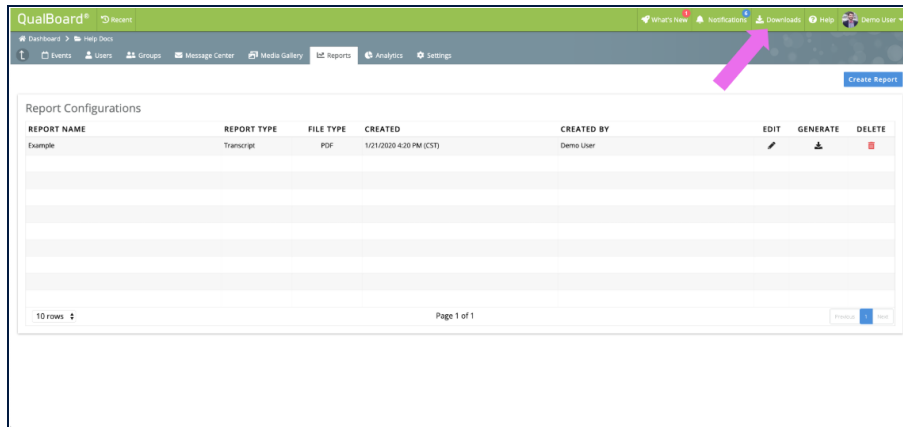
Page 1 of 1

Previous

Next

8 of 8

Your report will be available for download from the downloads icon at the top of the screen.



The screenshot shows the QualBoard web application interface. At the top, there is a navigation bar with the QualBoard logo and a 'Recent' dropdown. Below this is a secondary navigation bar with links for Dashboard, Users, Groups, Message Center, Media Gallery, Reports, Analytics, and Settings. On the right side of the top navigation bar, there are icons for What's New, Notifications, Downloads, and Help, along with a user profile for 'Demo User'. A pink arrow points to the 'Downloads' icon. Below the navigation bars, the main content area is titled 'Report Configurations' and contains a table with columns for Report Name, Report Type, File Type, Created, Created By, Edit, Generate, and Delete. The table has one row with the example data: 'Example', 'Transcript', 'PDF', '1/21/2020 4:20 PM (CST)', 'Demo User', and icons for edit, generate, and delete. At the bottom of the table, it says '10 rows' and 'Page 1 of 1'. There are 'Previous' and 'Next' buttons at the bottom right of the table.

REPORT NAME	REPORT TYPE	FILE TYPE	CREATED	CREATED BY	EDIT	GENERATE	DELETE
Example	Transcript	PDF	1/21/2020 4:20 PM (CST)	Demo User			