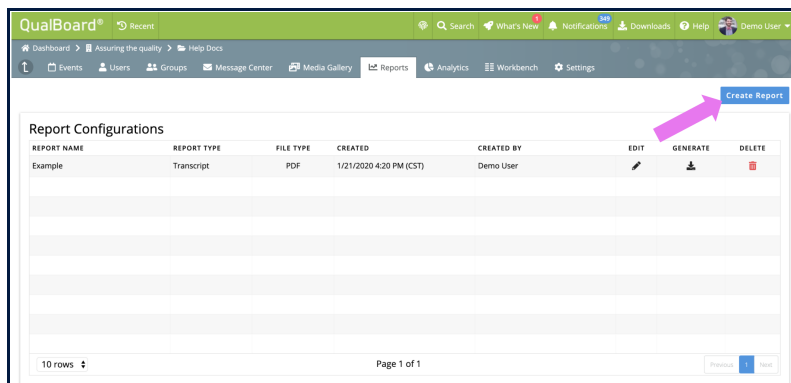


Generating a Polling Report

Last Modified on 04/28/2020 4:43 pm EDT

1 of 7

From the Reports tab, click the **Create Report** button to create your report configuration.



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

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First select your report type as Polling.

A screenshot of the 'Edit Report' form in the QualBoard application. The form is titled 'Edit Report' and has a close button (X) in the top right corner. It is divided into five sections: 1. Setup, 2. Report Name, 3. Filter By, 4. Include, and 5. Export. In the '1. Setup' section, the 'Select Type' dropdown menu is open, showing options: 'Polling' (selected), 'CrossTab', 'Transcript', and 'Text Group Discussion'. A pink arrow points to the 'Polling' option. The '2. Report Name' section has a text input field with the placeholder 'Enter your report name here'. The '3. Filter By' section has three sub-sections: 'Users' with a 'Filter by user...' dropdown, 'Group Tags' with a 'Filter by group tag...' dropdown, and 'Insight Tags' with a 'Filter by insight tags...' dropdown. The '4. Include' section has a message: 'This report type does not support includes'. The '5. Export' section has a 'Select File Type' dropdown with 'XLSX' selected. At the bottom of the form is a 'Save Report' button.

Your next step is to choose the events or tasks that you want to include in your report.

1. Setup

Select Type: Polling

Report Name: Enter your report name here

Events

- + ☒ Help Doc Example
- + ☒ Group Discussion Demo
- + ☒ Demo Diary
- + ☒ Uploading Media Example
- + ☐ Test Group Discussion

3. Filter By

Users: Filter by user...

Group Tags: Filter by group tag...

Insight Tags: Filter by insight tags...

4. Include

This report type does not support includes

5. Export

Select File Type: XLSX

Save Report

You can also add filters for users, group tags, and insight tags. **Note** that inside of an individual feature, they are "or'd" together, but between filters they are "and'd" together. For example, User is John or Jill; however if you also had an insight tag filter it would be "User is John or Jill AND insight tag is "Negative post"

1. Setup
Select Type: Polling
Report Name: Example Report

2. Events
+ ☒ Help Doc Example
+ ☒ Group Discussion Demo
+ ☒ Demo Diary
+ ☐ Uploading Media Example
+ ☐ Test Group Discussion

3. Filter By
Users: Filter by user...
Group Tags: Filter by group tag...
Insight Tags: Filter by insight tags...

4. Include
This report type does not support includes

5. Export
select file Type: XLSX

Save Report

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Click Save Report at the bottom to create your report configuration.
Excel is the only file type available for a Polling Report.

1. Setup
Select Type: Polling
Report Name: Example Report

2. Events
+ ☒ Help Doc Example
+ ☒ Group Discussion Demo
+ ☒ Demo Diary
+ ☐ Uploading Media Example
+ ☐ Test Group Discussion

3. Filter By
Users: Filter by user...
Group Tags: Filter by group tag...
Insight Tags: Filter by insight tags...

4. Include
This report type does not support includes

5. Export
Select File Type: XLSX

Save Report

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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, simply click the edit icon and save your changes.

QualBoard® Recent

Dashboard > Assuring the quality > Help Docs

Events Users Groups Message Center Media Gallery Reports Analytics Workbench Settings

Create Report

Report Configurations

REPORT NAME	REPORT TYPE	FILE TYPE	CREATED	CREATED BY	EDIT	GENERATE	DELETE
Example Report	Polling	XLSX	4/14/2020 12:23 PM (CDT)	Demo User			
Example	Transcript	PDF	1/21/2020 4:20 PM (CST)	Demo User			

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

QualBoard® Recent

Dashboard > Assuring the quality > Help Docs

Events Users Groups Message Center Media Gallery Reports Analytics Workbench Settings

Downloads Help Demo User

Report Configurations

REPORT NAME	REPORT TYPE	FILE TYPE	CREATED	CREATED BY
Example Report	Polling	XLSX	4/14/2020 12:23 PM (CDT)	Demo User
Example	Transcript	PDF	1/21/2020 4:20 PM (CST)	Demo User

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Downloads

Today

Example Report-Polling:106457a6810...

test-Polling-6180ad0b80042959c105d...

Yesterday

test-Transcript-9a51bb70ae30462182c...

Older

test-Transcript-15119fb3ef9947abb0f...

test.zip

Video insight Clips.zip

2.14 smoke test private Avatars.zip

3.5 smoke test private Avatars.zip

test-Transcript-6a4fd8a6ee84243a8b...

Olivia Test Avatars.zip

DELETE

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