Generating a Report

Last Modified on 01/27/2025 2:46 pm EST

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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.

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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.

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

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).

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.

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

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.

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

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