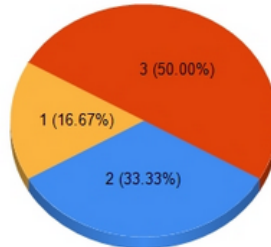


Checkbox 5 Report Filters Guide

This user guide provides an overview of report filters and will show you how to create and apply filters to an existing report or report item.

Was this your first purchase with our company?

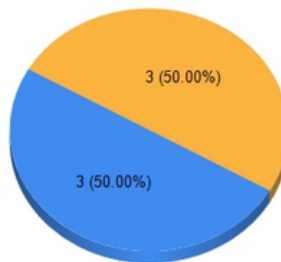
6 Responses



■ No ■ Not Sure ■ Yes

Would you recommend this company to a friend or colleague?

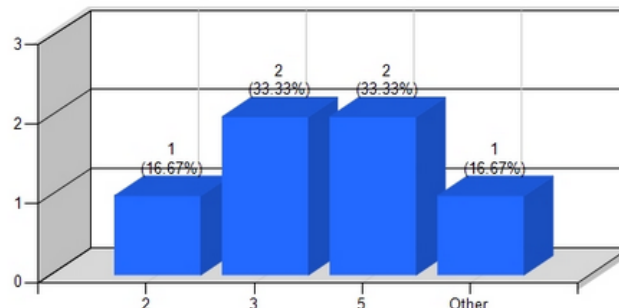
6 Responses



■ Not Sure ■ Yes

How would you rate your overall satisfaction your most recent sales interaction?

6 Responses



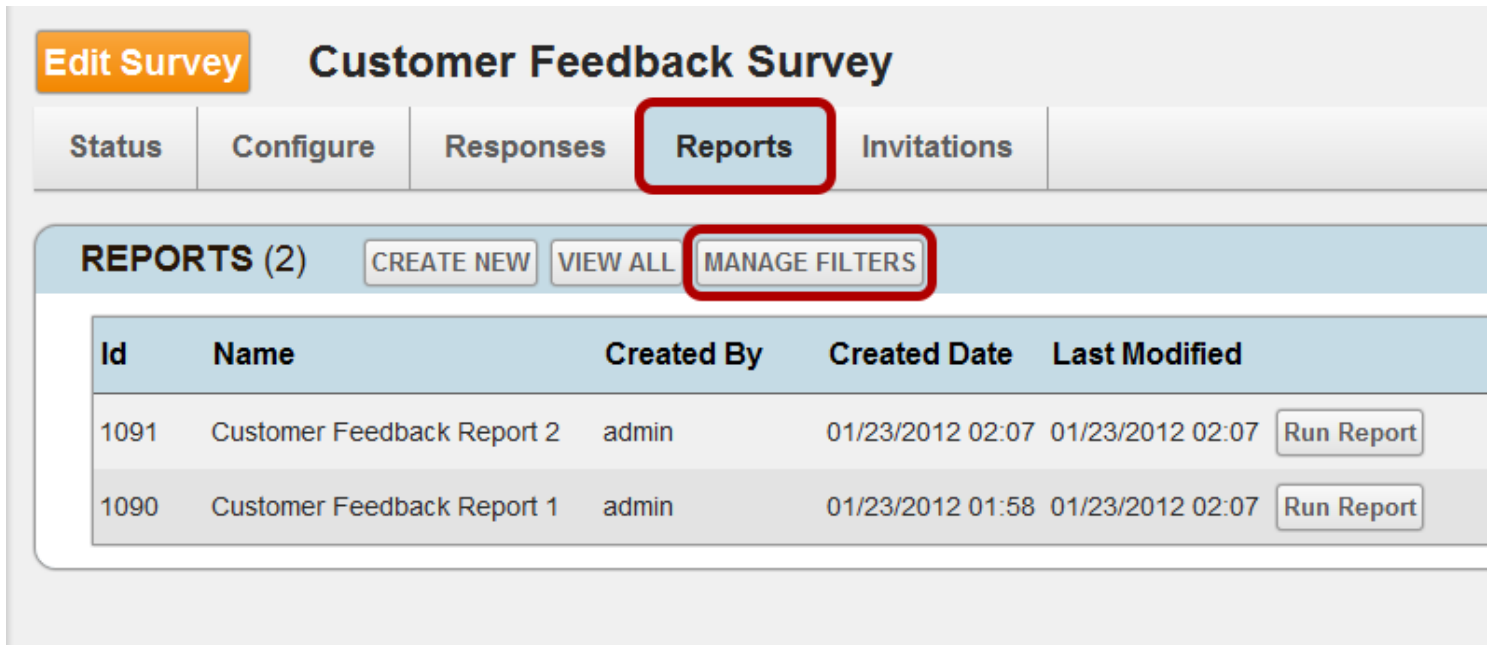
The report above is an unfiltered report for a survey called "Customer Feedback Survey." This survey has six total responses. In this guide we will apply a filter to this report so that only respondents that indicated that this was their first purchase with our company will be reflected in

the report.

Generate Filter

The screenshot displays the 'Survey Manager' interface. At the top, there is a navigation bar with the 'checkbox' logo and menu items: SURVEYS, USERS, STYLES, and LIBRARIES. Below this, the 'Survey Manager' title is followed by a 'CLOSE' link. Three buttons are visible: 'Create Folder', 'Create Survey', and 'Import Survey'. A list of surveys is shown, with 'Customer Feedback Survey' highlighted and a right-pointing arrow next to it. Below it is 'Employee Feedback Survey'. To the right of the survey list, there is a detailed view for the 'Customer Feedback Survey'. This view includes an 'Edit Survey' button and a tabbed interface with 'Status' selected. Other tabs include 'Configure', 'Responses', 'Reports', and 'Invitations'. Below the tabs are buttons for 'Launch', 'Preview', 'Test', 'Copy/Move', 'Export', and 'Delete'. A 'LINKS' section contains a URL: <http://howto.checkboxonline.com/Survey.aspx?s=028941f3892646dda0c> and an 'Add Custom URL' button. An 'INFORMATION' section lists: 'Created By: admin', 'Last Updated: 01/23/2012 01:54 PM', 'Scored: ', 'Locked: ', and 'Anonymize Responses: .

From the **Survey Manager**, select the survey you wish to modify the report for to expand the **Survey Dashboard**.



The screenshot shows the 'Customer Feedback Survey' interface. At the top, there is an 'Edit Survey' button and a title 'Customer Feedback Survey'. Below the title are several tabs: 'Status', 'Configure', 'Responses', 'Reports', and 'Invitations'. The 'Reports' tab is selected and highlighted with a red box. Below the tabs, there is a section titled 'REPORTS (2)' with three buttons: 'CREATE NEW', 'VIEW ALL', and 'MANAGE FILTERS'. The 'MANAGE FILTERS' button is highlighted with a red box. Below this is a table with the following columns: 'Id', 'Name', 'Created By', 'Created Date', and 'Last Modified'. There are two rows of data in the table, each with a 'Run Report' button to its right.

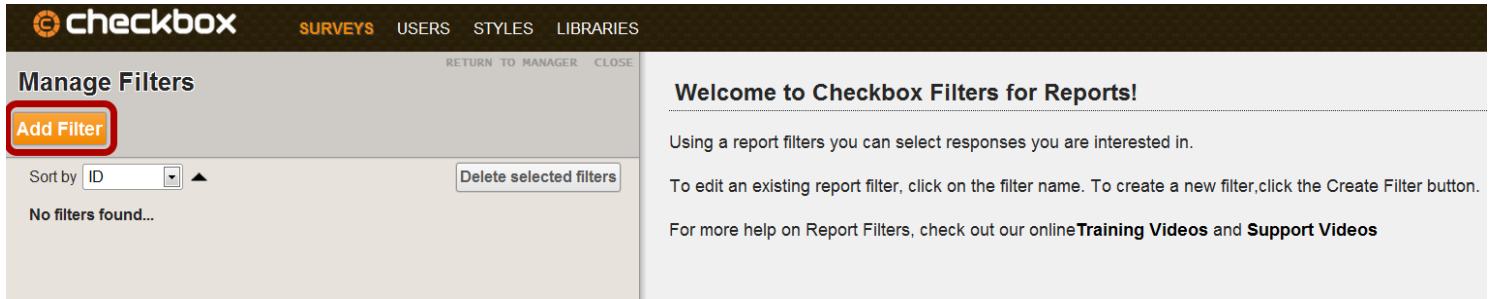
Id	Name	Created By	Created Date	Last Modified	
1091	Customer Feedback Report 2	admin	01/23/2012 02:07	01/23/2012 02:07	Run Report
1090	Customer Feedback Report 1	admin	01/23/2012 01:58	01/23/2012 02:07	Run Report

Select the **Reports** tab. This page will show you a list of available reports for this survey. You should also see three buttons at the top of the list:

1. Create New
2. View All
3. Manage Filters

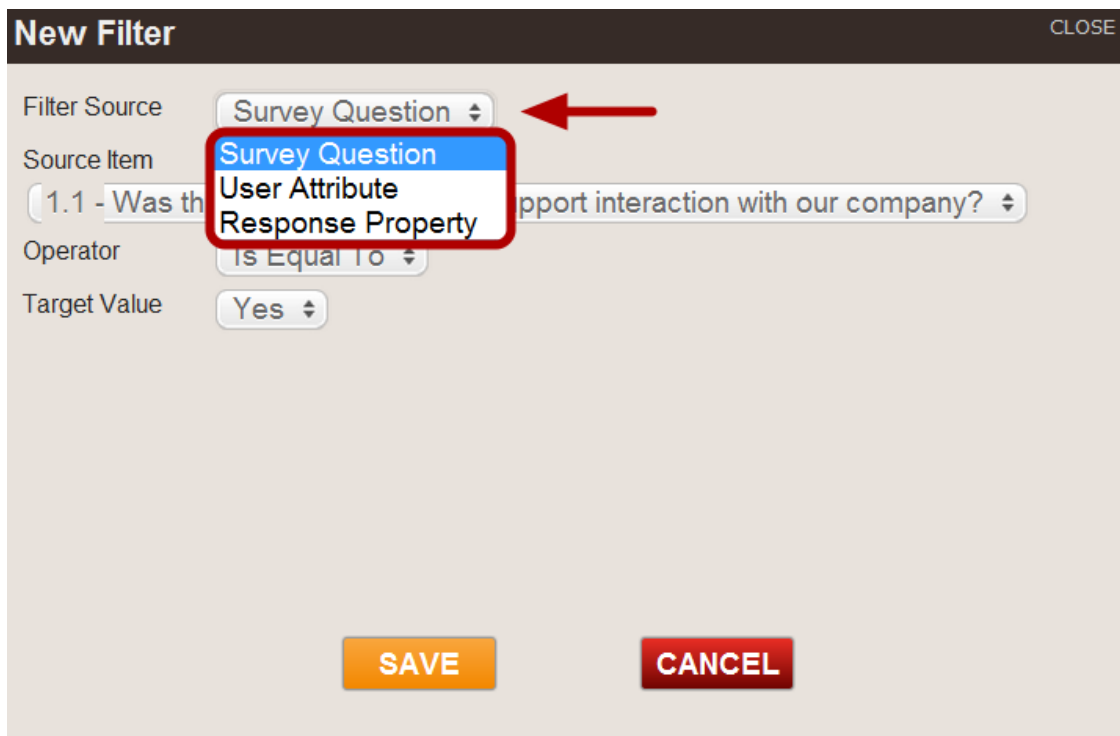
Select **Manage Filters** to create and modify report filters. Filters created here can be applied to any report generated for this survey.

NOTE: Report filters are unique to the survey they are created for.



All available filters will appear on the left-hand side of the screen. In this example, no report filters have been created for this survey yet.

Select the **Add Filter** button to configure a new filter.



A dialog box will appear.

Select a **Filter Source** from the drop-down list.

Like with conditions, branching, and merging sources, filter source options include either a **Survey Question**, **User Attribute**, or **Response Property**.

New Filter CLOSE

Filter Source: Survey Question ▾

Source Item: 1.1 - Was this your first purchase with our company? ▾

Operator: 1.1 - Was this your first purchase with our company?

Target Value: 1.2 - Would you recommend this company to a friend or colleague?

1.3 - How would you rate your overall satisfaction your most recent sa

2.1 - Please explain your reasons for dissatisfaction:

SAVE **CANCEL**

Each filter source type yields different options for the next drop-down:

When the filter source is **Survey Question** the next configuration option will be **Source Item**, which populates with available questions from the survey.

New Filter CLOSE

Filter Source: User Attribute

Attribute Name: FirstName

Operator:

- FirstName
- LastName
- Zip
- UID

Target Value:

SAVE **CANCEL**

When the filter source is **User Attribute** the next configuration option will be **Attribute Name**, which populates with available user attributes (also known as Profile Properties) from the User Manager.

The screenshot shows the 'New Filter' dialog box with the following configuration:

- Filter Source: Response Property
- Property Name: Survey Completed Date
- Operator: Survey Completed Date (highlighted in a dropdown menu)
- Target Value: Invitee

Other options in the dropdown menu include: IP Address, Survey Response Is Complete, Response Language, Survey Response Last Modified, Last Page Viewed, Network Login, Respondent GUID, Response GUID, Numeric Response ID, Survey Start Date, and Username. At the bottom, there are 'SAVE' and 'CANCEL' buttons.

When the filter source is **Response Property** the next configuration option will be **Property Name**, which populates with various response-related data types for the survey.

The screenshot shows the 'New Filter' dialog box with the following configuration:

- Filter Source: Survey Question (1)
- Source Item: 1.1 - Was this your first purchase with our company? (2)
- Operator: Is Equal To (3)
- Target Value: Yes (4)

The dropdown menu for Target Value shows options: Yes, No, and Not Sure. At the bottom, there are 'SAVE' and 'CANCEL' buttons, with the 'SAVE' button circled in red and labeled with a '5'.

1. In this example we want our filter based on the answer to a question in our survey, so we will select **Survey Question**.
2. We will select the first question in the survey, "Was this your first purchase with our

- company?" as the **Source Item**.
- Next, select the **Operator** (also known in Checkbox as the Comparison). In this example we will select "Is Equal To."
 - Finally, select the **Target Value**. This drop-down list populates with all possible answer choices for the question selected under Source Item. In this example we will select "Yes" as our target value.
 - Select **Save** to add the newly configured filter.

The screenshot displays the 'Manage Filters' interface in the Checkbox 5 application. The top navigation bar includes 'checkbox5', 'SURVEYS', 'USERS', 'STYLES', and 'LIBRARIES'. The 'Manage Filters' section features an 'Add Filter' button and a table with columns for 'ID', 'Type', and 'Filter'. A red arrow points to the 'RETURN TO MANAGER' link. The 'Edit Filter' section on the right shows the configuration for a filter: Filter Source (Survey Question), Source Item (1.1 - Was this your first purchase with our company?), Operator (Is Equal To), and Target Value (Yes). A 'SAVE' button is visible at the bottom right.

As you can see, the filters list has been populated with one item. This filter can now be applied to any report generated for this survey.

To edit an existing filter, select it from the list and use the preview window on the right side of the screen to edit. Only highlighted drop-down lists can be modified. Be sure to select Save after making changes.

At this point you can return to the Survey Dashboard to apply this filter by selecting **Return to Manager** at the top of the page.

Apply Filter to Entire Report

Edit Survey Customer Feedback Survey

Status Configure Responses **Reports** Invitations

REPORTS (2) CREATE NEW **VIEW ALL** MANAGE FILTERS

Id	Name	Created By	Created Date	Last Modified	
1091	Customer Feedback Report 2	admin	01/23/2012 02:07	01/23/2012 02:07	Run Report
1090	Customer Feedback Report 1	admin	01/23/2012 01:58	01/23/2012 02:07	Run Report

Applying a filter at the **report level** (as opposed to the item level) means that only responses that match the filter you applied will be included on the report.

To apply a filter to a report start in the **Survey Dashboard >> Reports** tab.

Select **View All** to manage reports.

Reports for Customer Feedback Survey

RETURN TO MANAGER CLOSE

Create New Manage filters

Sort by Report Name

ID	Report Name	Created By	Last Modified
<input checked="" type="checkbox"/>	1090 Customer Feedback Report 1	admin	01/23/2012 01:58 PM
<input type="checkbox"/>	1091 Customer Feedback Report 2	admin	01/23/2012 02:07 PM

Customer Feedback Report 1

<http://howto.checkboxonline.com/RunAnalysis.aspx?ag=3aa7a876-4be1-4...>

Edit Report Run Report Properties Delete Copy Permissions **Filters**

Report Info

Created By admin

Created Date 01/23/2012 01:58 PM

Last Updated 01/23/2012 02:07 PM

All available reports for this survey will appear on the left-hand side of the screen.

Select the report you wish to apply a filter to. When the report dashboard expands on the right, select the **Filters** button.'

*NOTE: You can also add/modify filters from this view by selecting the **Manage Filters** button next to the **Create New** button.*

CLOSE

Apply Filters

Available Filters

Was this your first purchase with our company?
Is Equal To Yes

Applied Filters

No filters are applied.

Apply Filters

SAVE **CANCEL**

A window will appear. Select the desired filter from the **Available Filters** list on the left. Since we have only created one filter, we only have one to choose from.

Select **Apply Filters**.

CLOSE

Apply Filters

Available Filters

No filters are available.

Applied Filters

Was this your first purchase with our company?
Is Equal To Yes

Remove Selected Filters

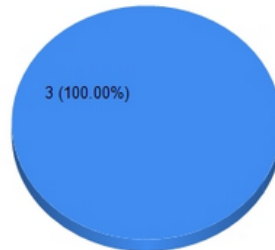
SAVE **CANCEL**

The filter should move to the right side of the window under the **Applied Filters** heading.

Select **SAVE** to apply the filter to your report.

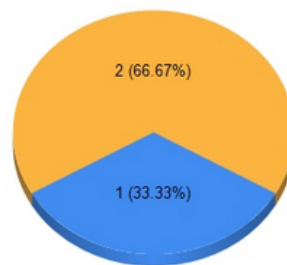
*NOTE: Should you wish to remove a filter, select the filter from the Applied Filters list and select the **Remove Selected Filters** button.*

Was this your first purchase with our company?
3 Responses



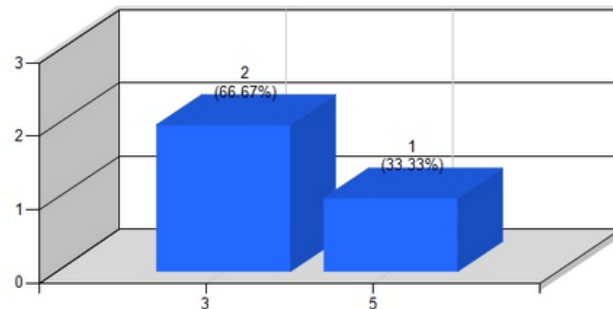
Yes

Would you recommend this company to a friend or colleague?
3 Responses



Not Sure Yes

How would you rate your overall satisfaction your most recent sales interaction?
3 Responses



The report above is a filtered version of the unfiltered report displayed earlier in this user guide. As you can see, only the three respondents that indicated on the feedback survey that this was their first purchase with our company have been included in the report.

Apply Filter to Report Item

Edit Survey Customer Feedback Survey

Status Configure Responses **Reports** Invitations

REPORTS (2) CREATE NEW VIEW ALL MANAGE FILTERS

Id	Name	Created By	Created Date	Last Modified	
1091	Customer Feedback Report 2	admin	01/23/2012 02:07	01/23/2012 02:07	Run Report
1090	Customer Feedback Report 1	admin	01/23/2012 01:58	01/23/2012 02:57	Run Report

Applying a filter at the **item level** (as opposed to the report level) means that only responses that match the filter you applied will be included on the individual report item. All other items should display the survey's full response data (unless other report or item filters have been applied).

To apply a filter to a report item, start in the **Reports** tab of the Survey Dashboard.

Select the report you wish to modify from the list provided.

Edit Report - Customer Feedback Report 2

New Page Run Report

Page 1 Add Item Move Copy 4 Items

- 1.1 Summary Chart Was this your first purchase with our company?
- 1.2 Summary Chart Would you recommend thi... a friend or colleague?
- 1.3 Summary Chart How would you rate your...cent sales interaction? →
- 1.4 Response Details Please explain your reasons for dissatisfaction:

1.3 - How would you rate your...cent sales interaction?

Move/Copy Delete

Preview Source Items Behavior Appearance **Filters**

Available Filters

- Was this your first purchase with our company?
Is Equal To Yes

Applied Filters

No filters are applied.

Apply Filters

SAVE CANCEL

From the list of pages and items on the left, select the report item you wish to apply a filter to.

When the Item Editor expands on the right, select the **Filters** tab.

1.3 - How would you rate your...cent sales interaction?

Move/Copy Delete

Preview Source Items Behavior Appearance **Filters**

Available Filters

- Was this your first purchase with our company?
Is Equal To Yes

Applied Filters

No filters are applied.

Apply Filters

SAVE CANCEL

Select the desired filter from the **Available Filters** list on the left. Since we have only created one filter, we only have one to choose from.

Select **Apply Filters**.

1.3 - How would you rate your...cent sales interaction?

Move/Copy Delete

Preview	Source Items	Behavior	Appearance	Filters
---------	--------------	----------	------------	---------

Available Filters

No filters are available.

Applied Filters

Was this your first purchase with our company?
Is Equal To Yes

Remove Selected Filters

SAVE **CANCEL**

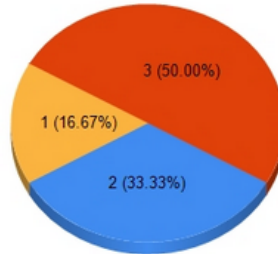
The filter should move to the right side of the window under the **Applied Filters** heading.

Select **SAVE** to apply the filter to your report item.

*NOTE: Should you wish to remove a filter, select the filter from the Applied Filters list and select the **Remove Selected Filters** button.*

Was this your first purchase with our company?

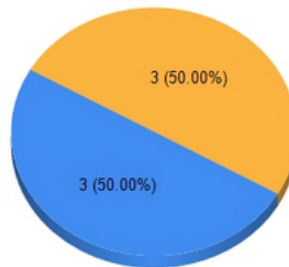
6 Responses



No Not Sure Yes

Would you recommend this company to a friend or colleague?

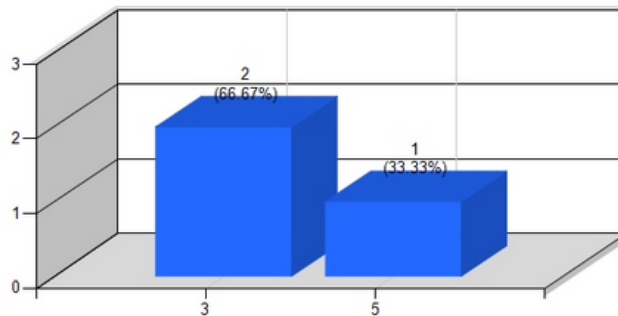
6 Responses



Not Sure Yes

How would you rate your overall satisfaction your most recent sales interaction?

3 Responses



The report above is a filtered version of the unfiltered report displayed earlier in this user guide. As you can see, only the third report item has been filtered.

Thank you for viewing this Checkbox How-To Guide. [Click here to return to Checkbox Resources](#)