Checkbox 5 Report Wizard Guide

This document will take you through the steps of generating a new visual report using the Checkbox Report Wizard.

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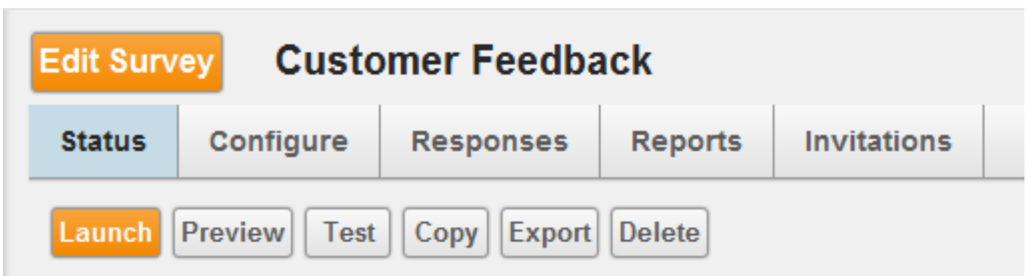
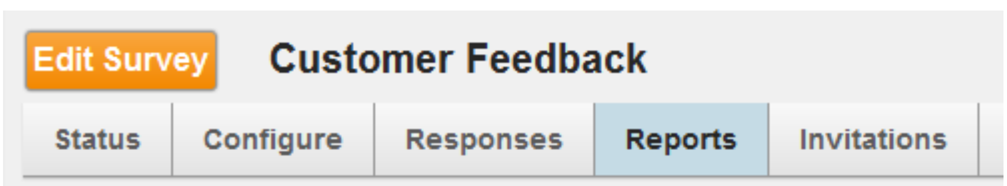
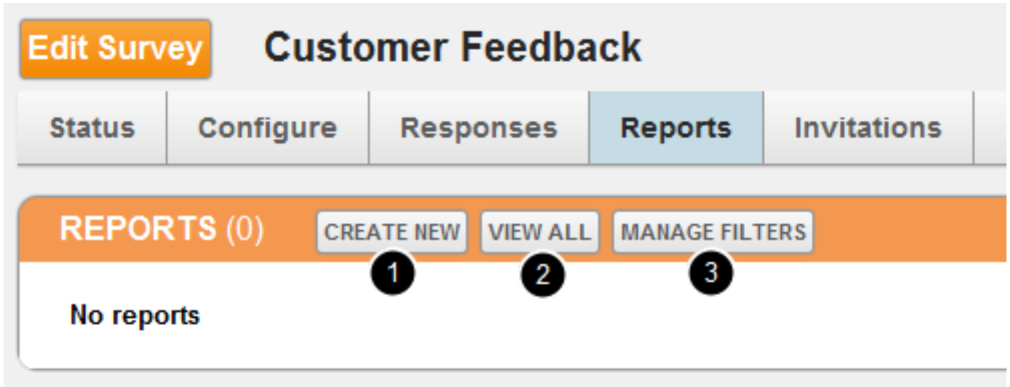
Enter Report Wizard



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

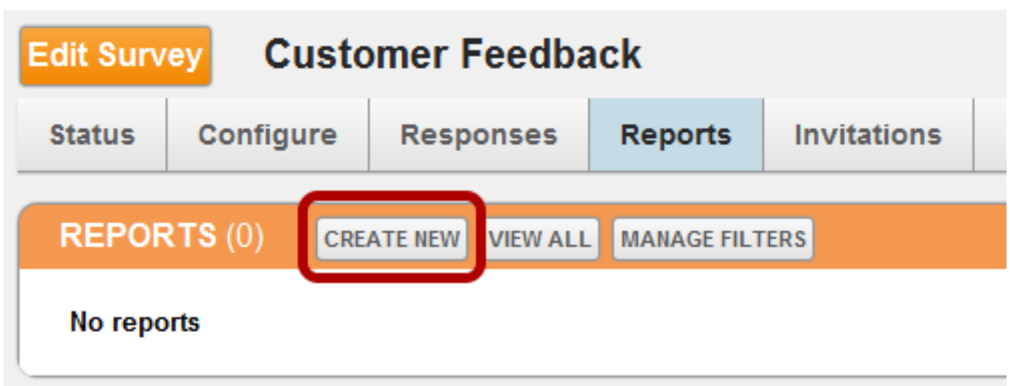


Select the **Reports** tab from the dashboard menu.



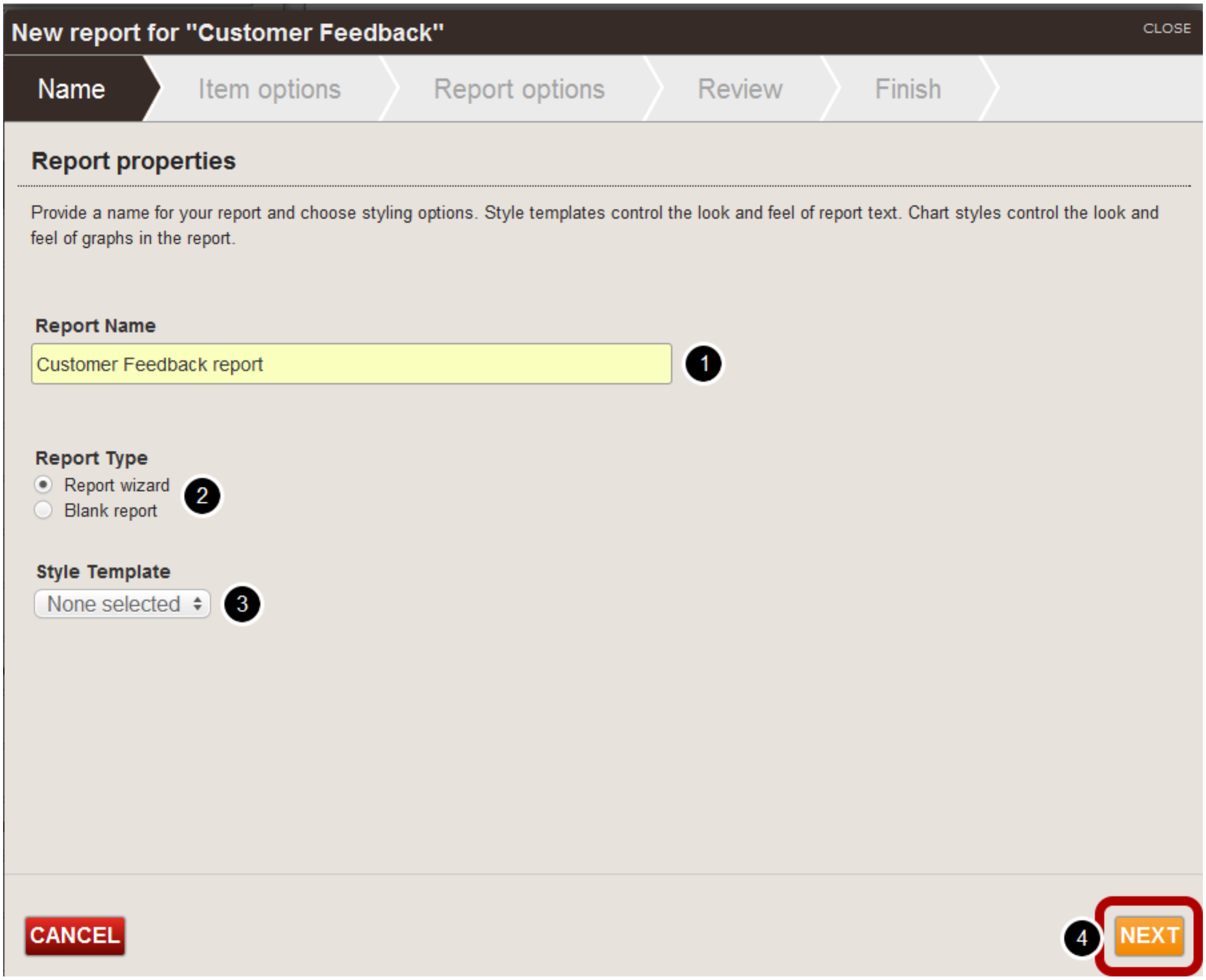
If no reports have been created for this survey, you will see "0" in parentheses on the Reports menu bar, and "No Reports" in the report list area.

1. **Create New** = Open the Report Wizard to generate a new report
2. **View All** = Enter the Reports Manager to view and manage all created reports for this survey
3. **Manage Filters** = Create and manage report filters. The filters created here can be applied to any report generated for this survey



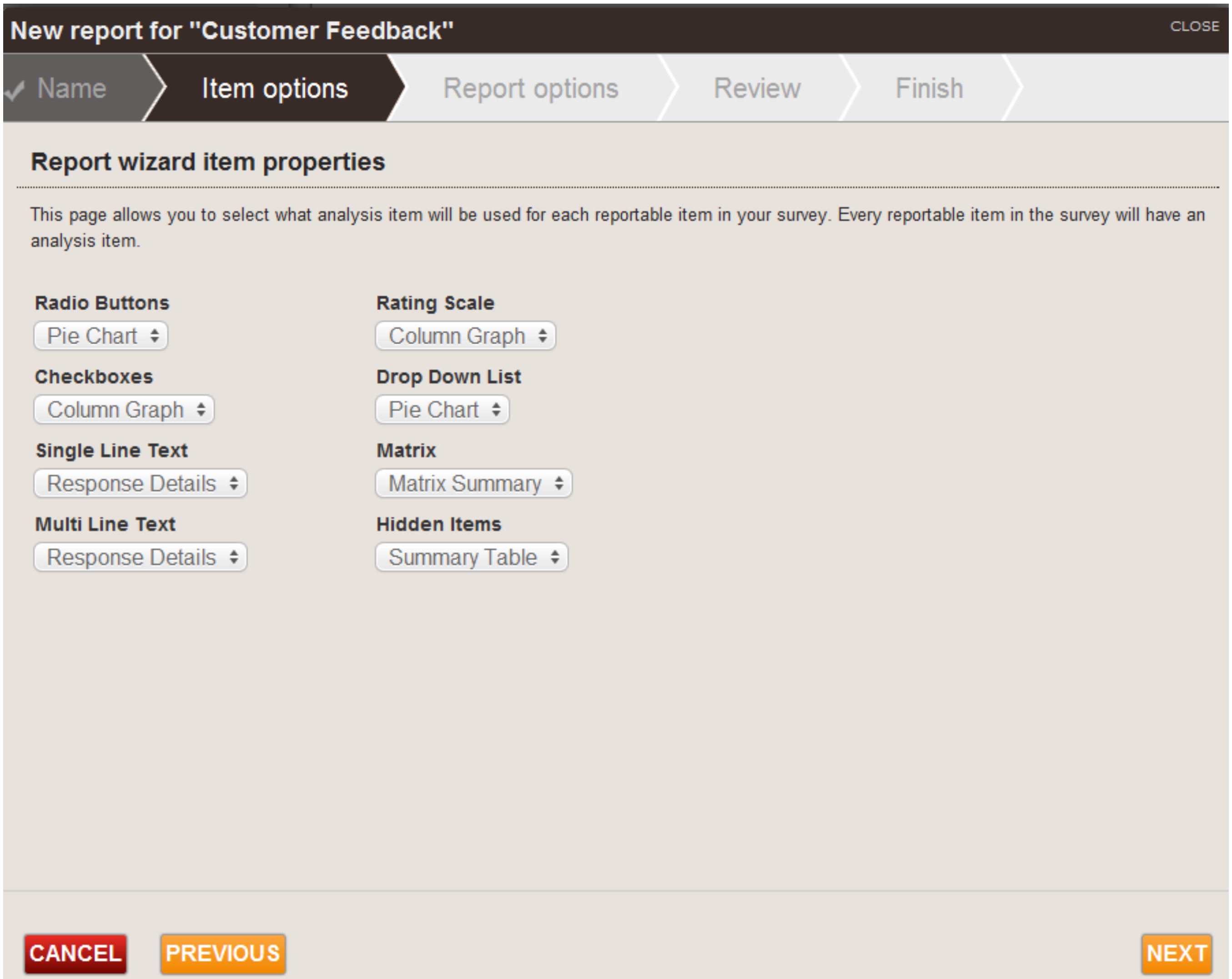
Click on the **Create New** button to open the Report Wizard.

Configure & Generate Report



Step 1: Name

1. Provide a **Name** for your report
2. Select Report Type: **Report Wizard** (one chart will automatically be generated for each reportable survey item. Charts can be modified or deleted.) or **Blank Report** (report is generated with no existing charts. You must build them manually)
3. Apply an existing **Style Template** from the drop-down list
4. Click **Next** to continue



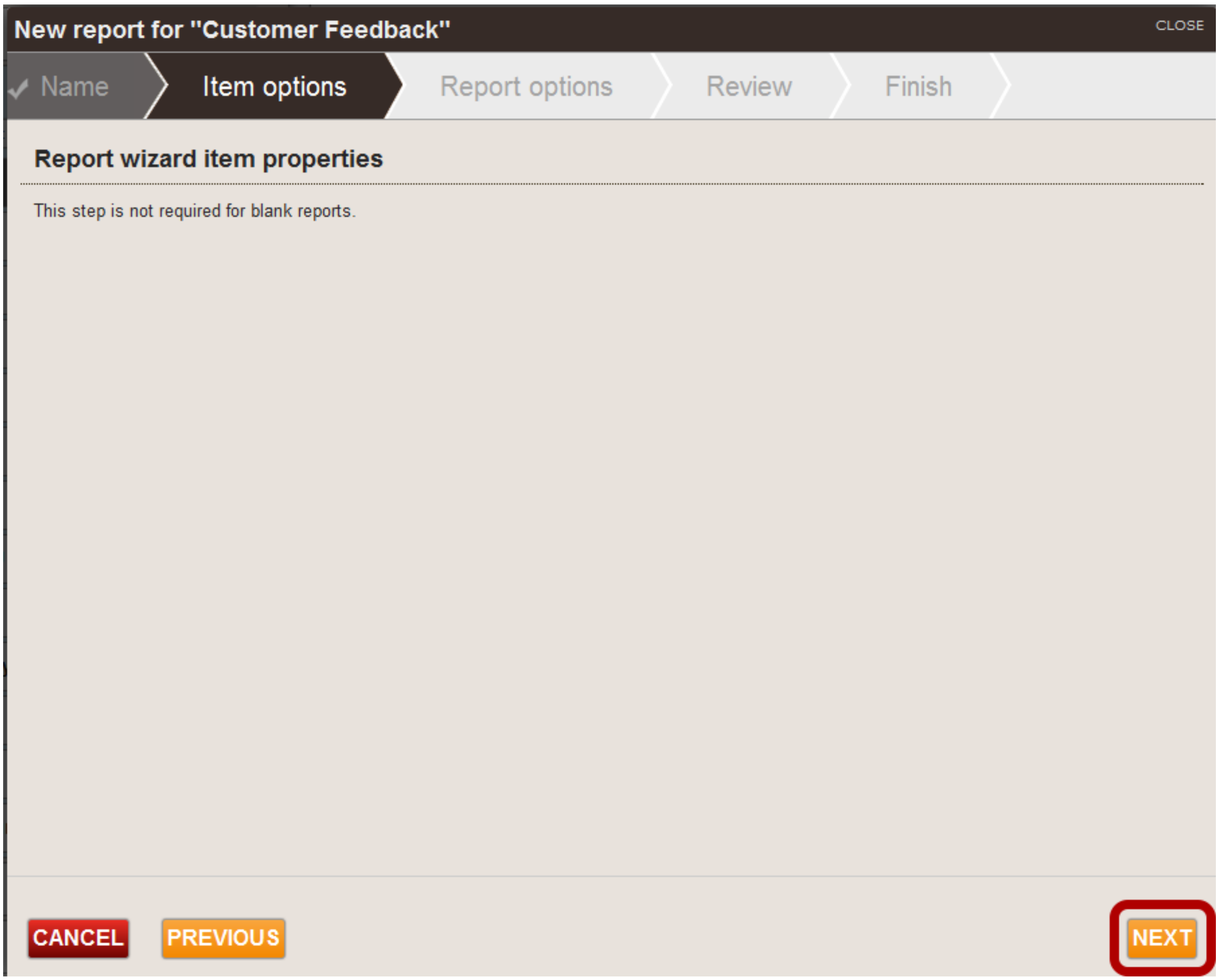
Step 2: Item Options

When Report Type is set to **Report Wizard** on Step 1, you will see a list of reportable survey items and associated chart types on the **Item Options** page.

Checkbox's Report Wizard defaults with the chart type/survey item type pairs shown above. According to this configuration, the results for all Radio Button question items in your survey will be displayed as Pie Charts, the results for all Checkbox question items in your survey will be displayed as Column Graphs, an so on.

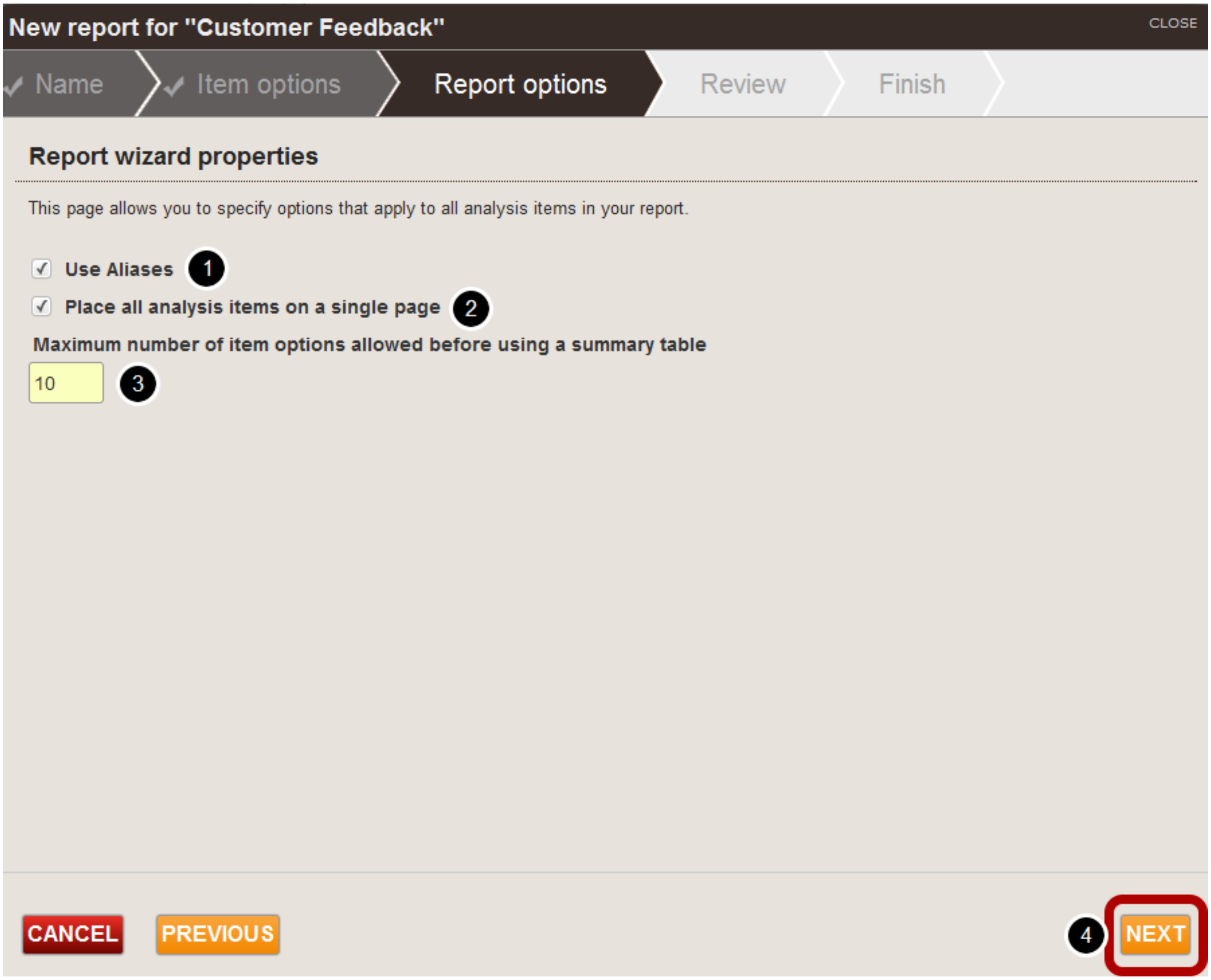
To change the default chart type for a reportable survey item, expand the drop-down list and select another chart option.

NOTE: After a report is created, chart types can be changed in the Report Editor.



The Item Options page is not required if you selected **Blank Report** as the Report Type on Step 1.

Click the **Next** button to skip to Step 3: Report Options.



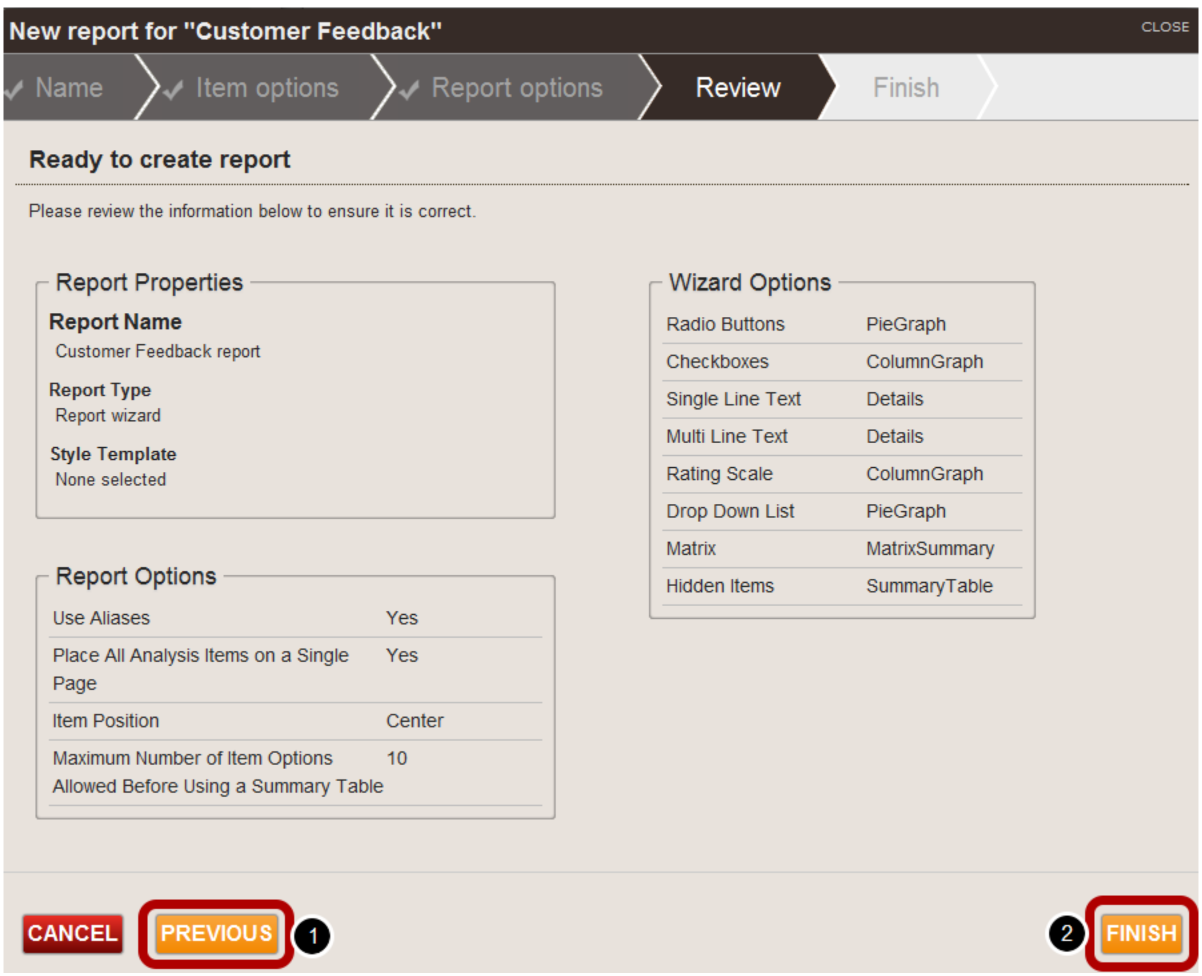
Step 3: Report Options

1. An **alias** acts as alternate question text. Aliases are created in survey item editors and can be enabled when generating reports and exports. If you included one or more aliases in your survey, check the "Use Aliases" box here to display aliases in the survey report in place of question text.
2. Check this box to place all charts and tables on the same **report page**. When you run the report, you will be able to scroll through the entire report without moving to another page. If this box is left unchecked, the report pages will mimic that of your survey. For example, if you generate a report for a three page survey with three radio button questions on each page, the report will also contain three pages with three report items on each page.
3. Set the maximum number of **item options** (answer choices) allowed in a chart before

switching to a summary table display. This features is useful when displaying results for a question with several answer options. For example, let's say you have a Radio Button question in your survey with 20 possible answer choices and you've set Radio Button question responses to display as pie charts in your report. If you don't want to squeeze all 20 options into a pie chart, you can set a maximum value here that will tell Checkbox to automatically display this particular question as a summary table instead of a pie chart, when that value is reached.

4. Click the **Next** button to review your report settings.

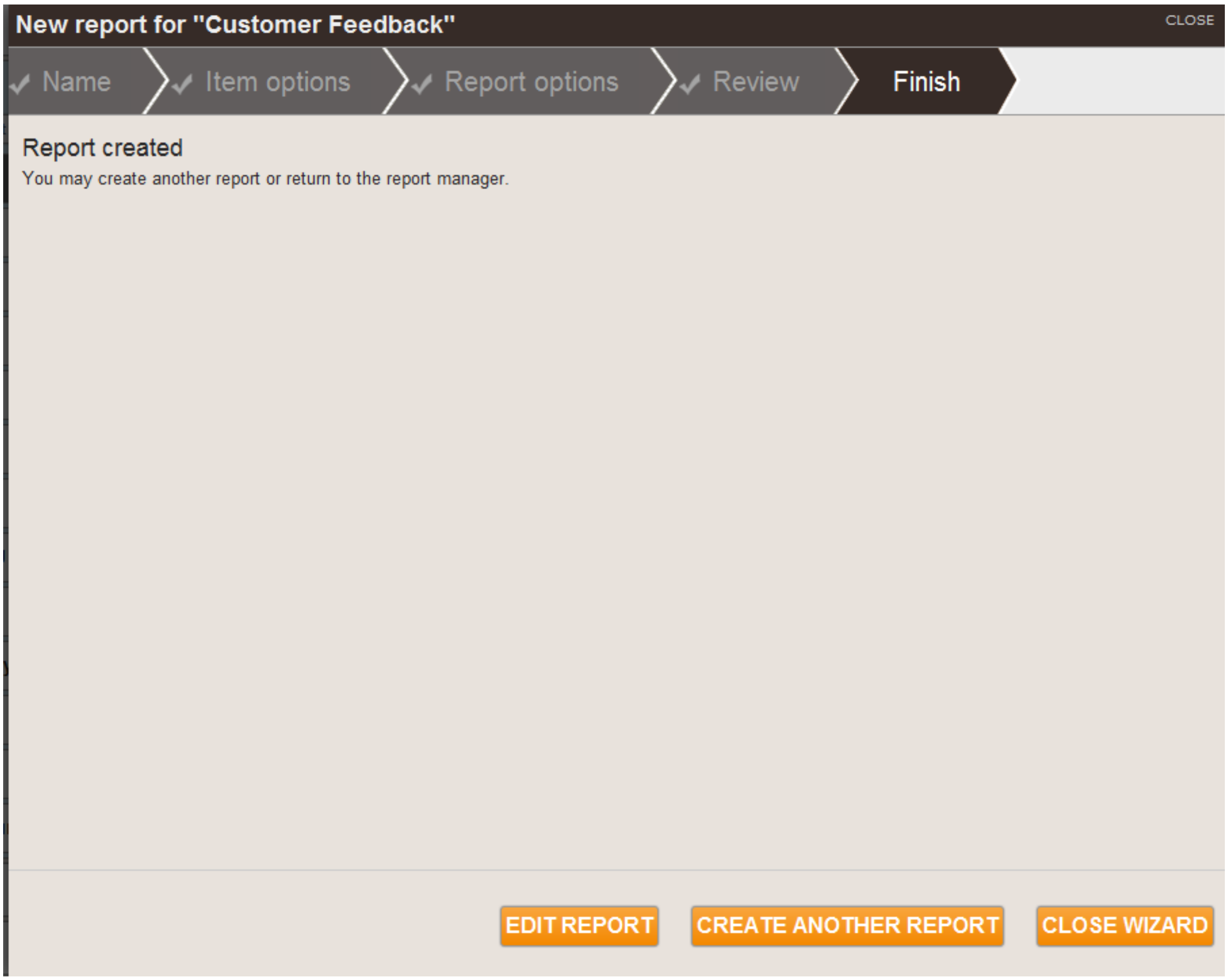
NOTE: After a report is created, report pages and item locations can be changed in the Report Editor.



Step 4: Review

Review your report settings.

1. Click the **Previous** button to return to earlier steps
2. Click the **Finish** button to save your report settings



Step 5: Finish

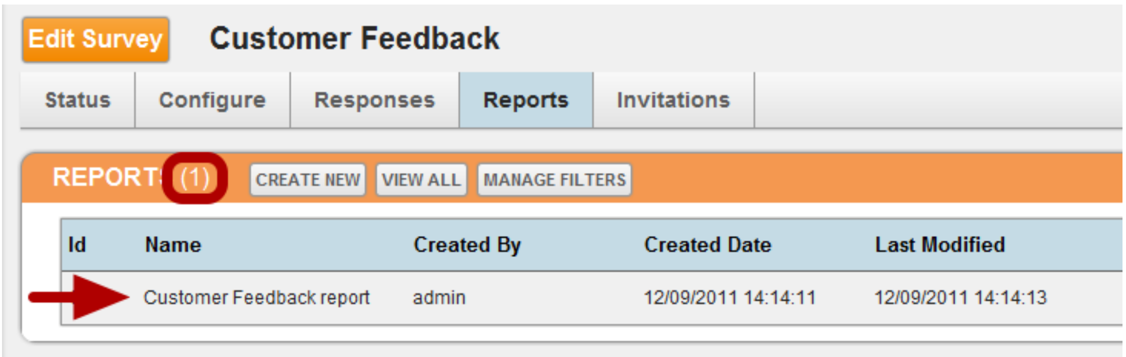
When you have reached this step, your report has been created. At this point you can either:

1. **Edit** and run your new report
2. **Create** another report

3. **Close** the Report Wizard and return to the Survey Manager Dashboard

In this example we will select **Close Wizard**.

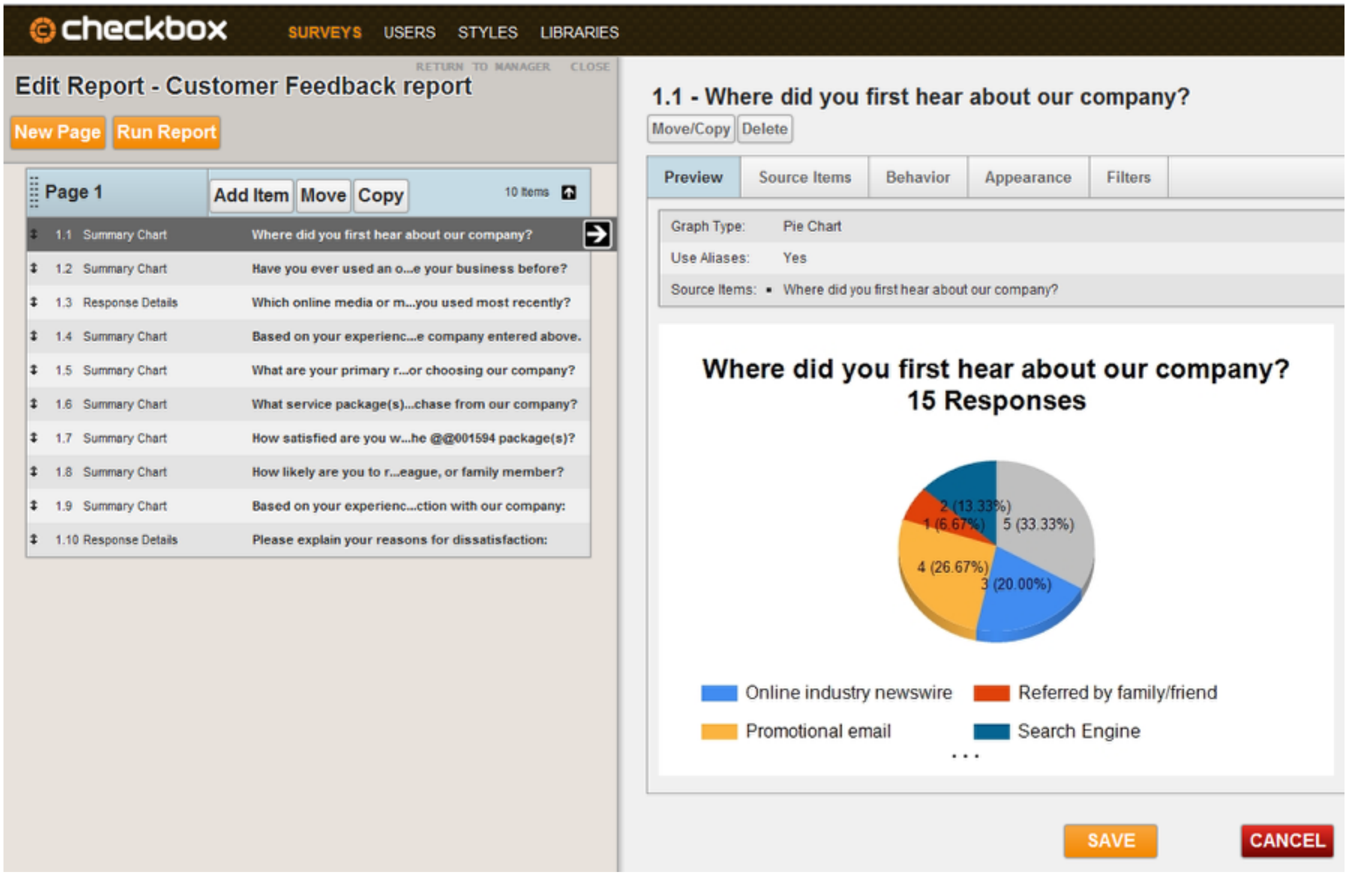
View & Run Report From Survey Dashboard



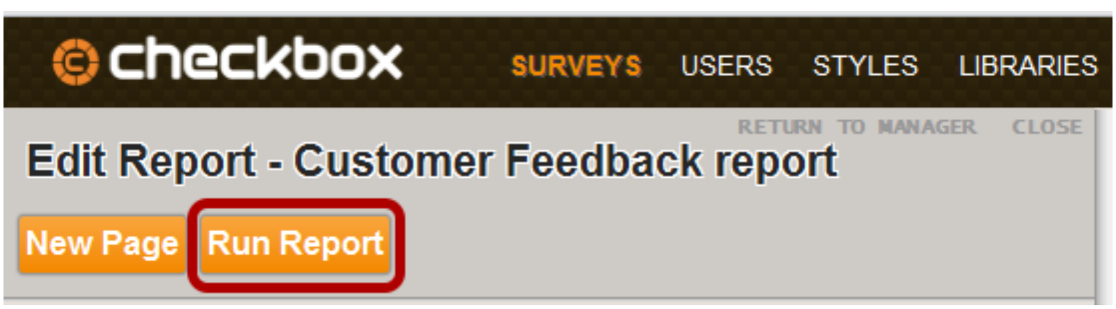
After closing the Report Wizard, you will be back in the **Survey Manager Dashboard**. Select the Reports tab on the dashboard menu. As you can see, our new report has been added. There is now a "1" in parentheses on the Reports menu bar, indicating the total number of reports created for this survey.

To **view and run** this report you can either select the report directly from the report list in the dashboard, or select the View All button on the Reports Menu to open the Reports Manager.

In this example we will select the report directly from the report dashboard list, which will open the **Report Editor**.



The **Report Editor** layout is similar to the Survey Editor layout in that pages and items are listed on the left side of the window and items are edited on the right side of the window.



Select the orange **Run Report** button to open a live report in a new browser tab/window.

Thank you for viewing this Checkbox User Guide. Click here to return to Checkbox Resources