

# Create and Customize a Standard Report

## Leading Practices and FAQs

Want to see how to take projects from good to great? Check out our [Leading Practice & FAQ Home Page!](#)

The Standard Report sets the standard for reporting in Alchemer. The customization possibilities are endless; well maybe not endless, but too many to cover in one tutorial anyway.

In this tutorial we'll overview the various reporting-building tools and some FAQs about [display customizations](#) to get you started.

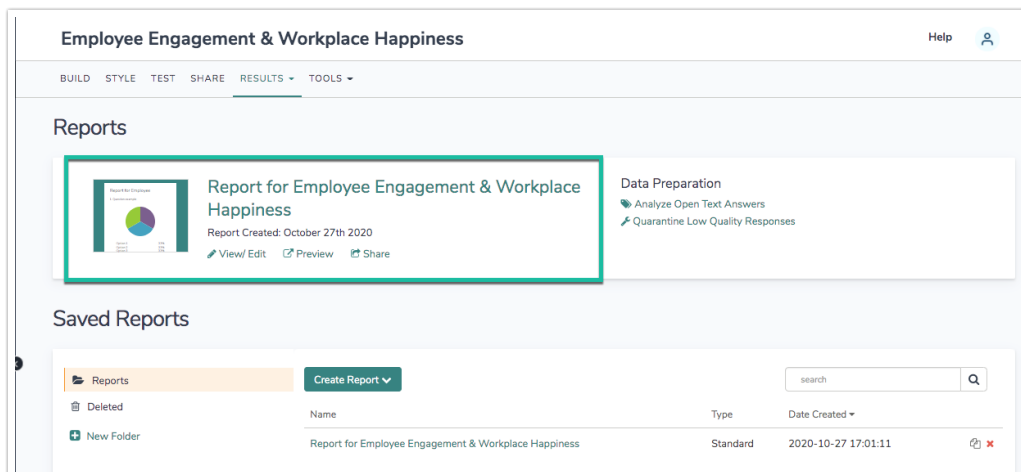
Check out these tutorials that cover other report features in depth:

- Explore Standard Report [Chart Types](#)
- [Filter the Data Shown in Your Report](#)
- [Share, Email, and Schedule Your Report](#)
- [Style Your Report](#)



## Use the Report Building Tools

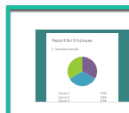
The Standard Report will be automatically created for you within your survey under **Results > Reports**. To get started reviewing and customizing your report click **View/Edit** link or the report thumbnail.



Employee Engagement & Workplace Happiness

BUILD STYLE TEST SHARE RESULTS TOOLS

### Reports



**Report for Employee Engagement & Workplace Happiness**  
Report Created: October 27th 2020  
[View/Edit](#) [Preview](#) [Share](#)

Data Preparation

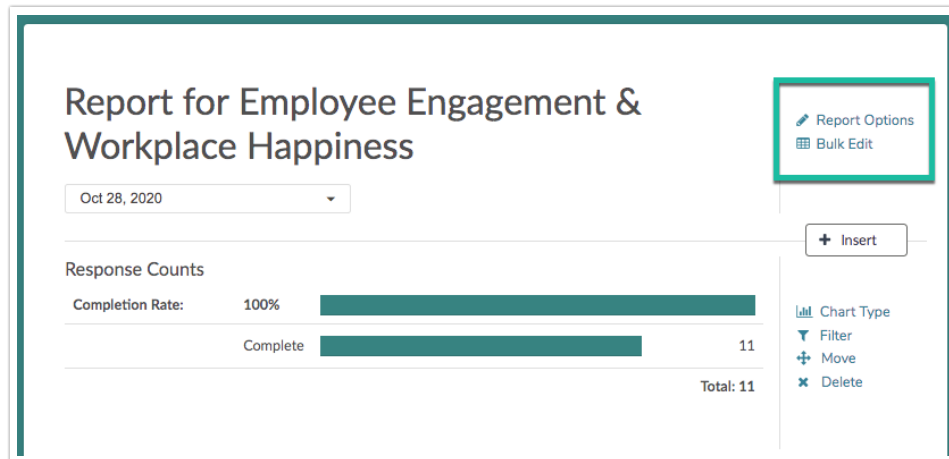
- Analyze Open Text Answers
- Quarantine Low Quality Responses

### Saved Reports

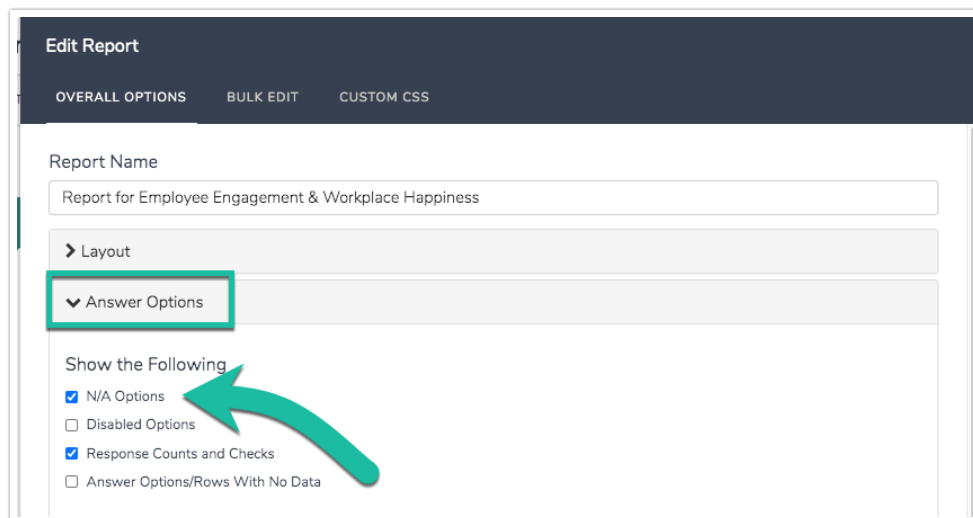
Name	Type	Date Created
Report for Employee Engagement & Workplace Happiness	Standard	2020-10-27 17:01:11

## Report Customizations: Overall Vs. Individual

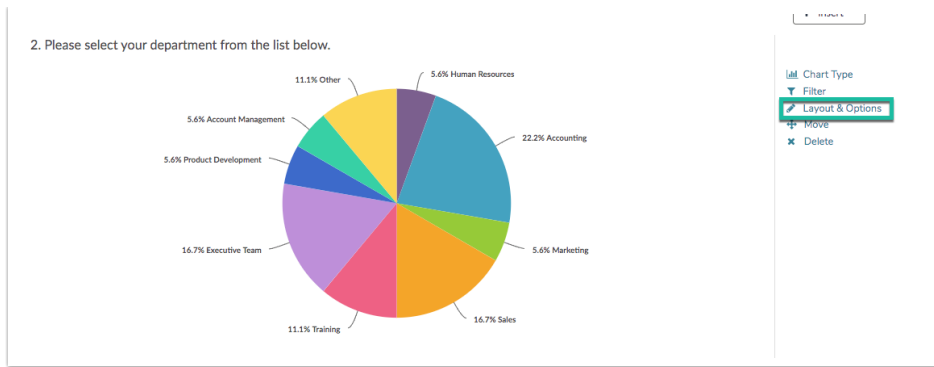
The **Report Options** and **Bulk Edit** tools allow you to make *global* report changes that affect all the questions in your report. Both of these options are available at the upper-right portion of your report.



Say, for example, you want to exclude all options marked with the [Not Applicable Special Setting](#). You can find the option to do so for all questions in your report by clicking **Report Options > Answer Options**.



However, you can make similar changes to an individual question. To explore the customization options for each question (they vary by question type) click **Layout & Options** on an element in your report and select your preferences.



**Edit Report Element**

CHART TYPE    FILTER    **LAYOUT & OPTIONS**

**Answer Options**

Show the following

- Disabled Options
- Answer Options/Rows With No Data

**Answer Option Names**

- Original Option Title
- Reporting Value

## Use the Hover Insert Tool

We added a an Insert tool that is available between any two elements in your report to easily add new elements to the report. You can use this to add a Question, Text, Summary Elements, and Tables.

### Add a Question to Your Report Using the Insert Tool

The insert tool is the easiest way to add questions to your report.

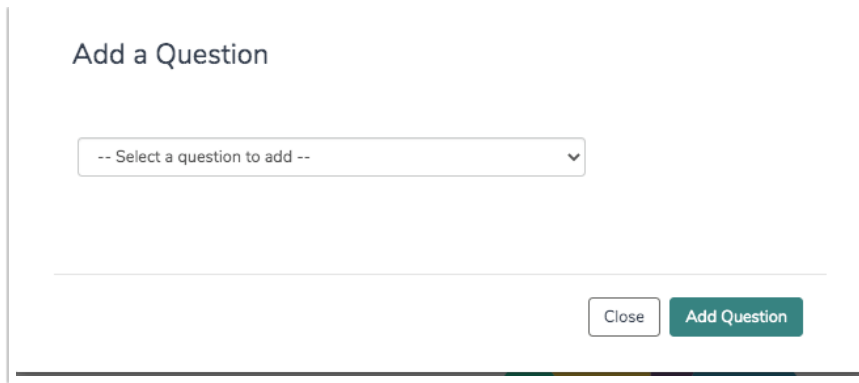
1. Click the **Insert** button between any two elements in your report and select **Question Chart** from the menu.

2. Please select your department from the list below.

**Insert**

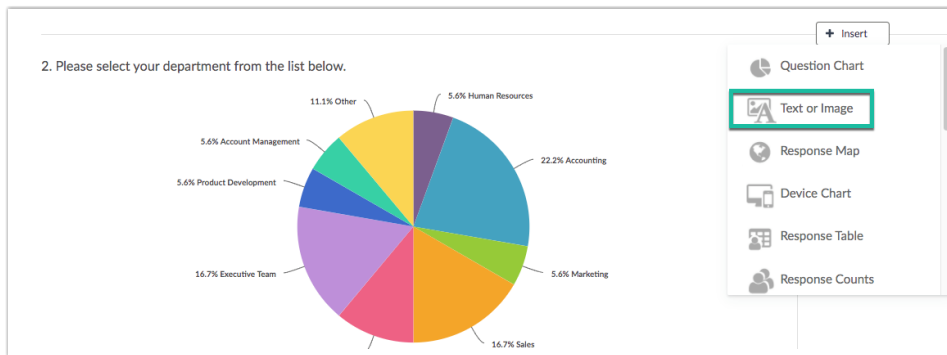
- Question Chart
- Text or Image
- Response Map
- Device Chart
- Response Table
- Response Counts

2. Next, select the question you wish to add from the dropdown menu and click **Add Question**.



## Add Text to Your Report Using the Insert Tool

If you wish to add some text to your report, click the **Insert** button between any two elements in your report and select **Text** or **Image** from the menu.

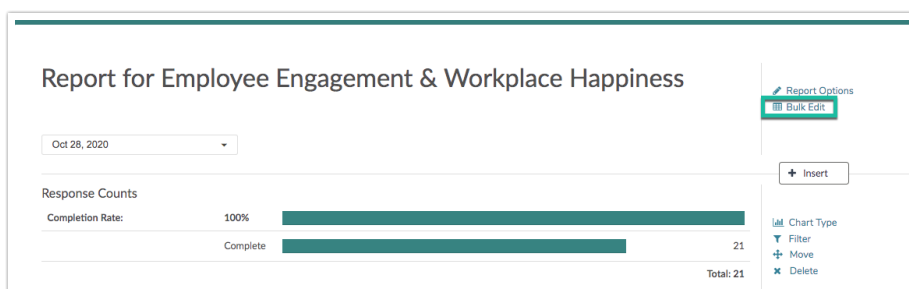


## Add Other Elements to Your Report: [Response Map](#), [Device Chart](#), [Response Table](#), [Response Counts](#), [Response Timeline](#), [Email Statistics](#), [DIY Grid/Cards](#), [Quotes](#), [Email Invite/Contact Fields](#), and [Crosstab](#)

There are several other elements available to add to your report via the Insert tool. To add one of these elements click the **Insert** button between any two elements where you wish to add and select it from the menu.

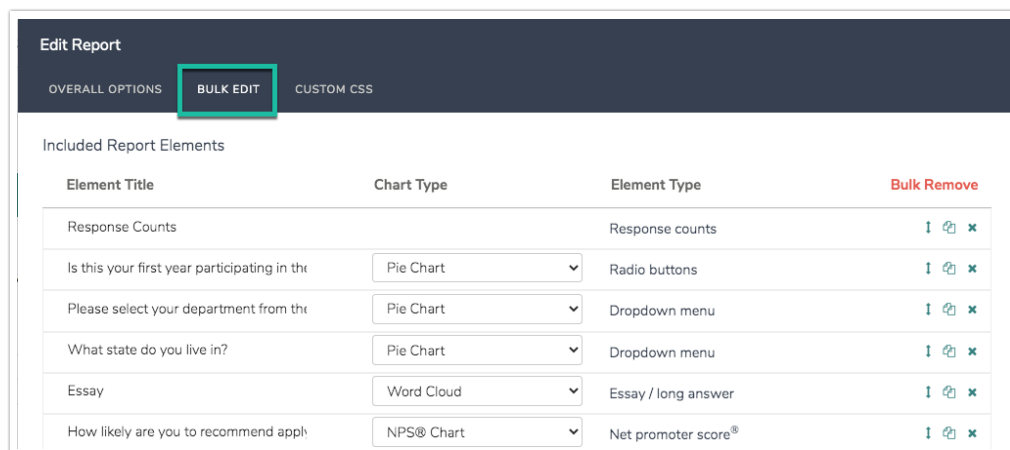
## Use the Bulk Editor

Click the **Bulk Edit** option in the upper-right of your report to [customize the elements](#) that are included in your report.



Via Bulk Edit, you can add, remove, bulk remove, copy and reorder questions. You can also change the chart type for compatible elements!

It's worth noting that many of these options are available when reviewing the report itself.



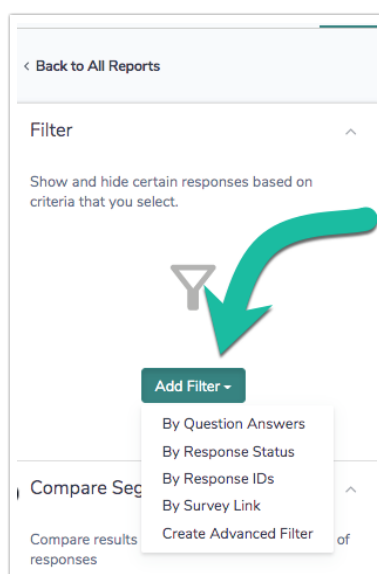
Element Title	Chart Type	Element Type	Bulk Remove
Response Counts		Response counts	📄 🔄 ✕
Is this your first year participating in the	Pie Chart	Radio buttons	📄 🔄 ✕
Please select your department from the	Pie Chart	Dropdown menu	📄 🔄 ✕
What state do you live in?	Pie Chart	Dropdown menu	📄 🔄 ✕
Essay	Word Cloud	Essay / long answer	📄 🔄 ✕
How likely are you to recommend appl	NPS® Chart	Net promoter score®	📄 🔄 ✕

## Filter Your Report

Filtering a Standard Report is easy as pie. You can filter by:

- Question Answers
- Response Status (Complete, Partial, Disqualified, Test)
- Response IDs
- Survey Link
- You can also create advanced filters with multiple conditions and/or groups of conditions. Learn more in our [Filter Report Data Tutorial](#).

Access the above filtering options by clicking the **Filter** menu in the left-hand panel of your report. This will expose the **Add Filter** button where you can select one or more of the above filtering categories.



Finally, if you wish to filter by the date responses were recorded check out our [Filter by Date Tutorial](#).

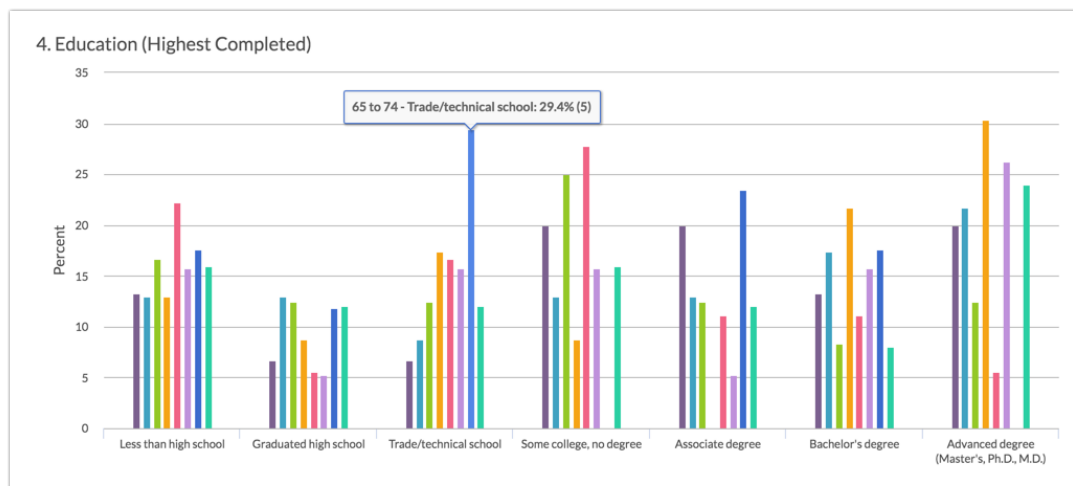
## Compare Data Within Your Report

Under the **Compare Segments** option in the left-hand panel you can set up Segments in the Standard Report to compare subgroups within your data. Typically, segments are groups within your data that you would like to make comparisons across. For instance, you might compare responses for males and females, age groups, or other demographic or firmographic characteristics.

Segments can be set up using:

- Question Answers
- Response Status
- Response IDs
- Response Date
- Survey Links
- You can also create advanced segments with multiple conditions and/or groups of conditions.

To learn more about setting up segments check out our [Segment Your Report Data Tutorial](#).



## Include Individual Responses in the Standard Report

Sometimes [the individual responses](#) are as important to understanding your data as the summarized/aggregated data. Use the **Insert** button located between any two report elements to include a grid of your Individual Responses. Select **Response Table** from the available options.

After selecting this option a table of Individual Responses will be added to your report. Here you will see a list of your responses.

**Response Table**

[Edit](#)  
[Move](#)  
[Delete](#)

Search by ID (e.g. #123) or question answers

ID	Status	Date	
<a href="#">257</a>	Complete	Dec 6, 2016 12:47 PM	<a href="#">View</a>
<a href="#">256</a>	Complete	Dec 6, 2016 12:47 PM	<a href="#">View</a>
<a href="#">255</a>	Complete	Dec 6, 2016 12:47 PM	<a href="#">View</a>
<a href="#">254</a>	Complete	Dec 6, 2016 12:47 PM	<a href="#">View</a>
<a href="#">253</a>	Complete	Dec 6, 2016 12:47 PM	<a href="#">View</a>

## Customize Grid Columns

If you wish to customize what is displayed in the grid:

1. Click the pencil icon in the upper right of the Response Table.
2. Next, click **Customize Grid Columns** and select **up to 5 fields** to include. Be sure to scroll to the bottom of the window and click **Done** to apply your changes.

**Customize Individual Response Grid Columns**  
 Select up to 5 questions/options to include in the individual response detail view.

**Options**

Status  
 Date/Time  
 Comments  
 Response Tags

**(untitled)**

(untitled)  
 1. How satisfied are you with our products and services?  
 2. How likely are you to recommend our products and services to your friends and family?  
 3. Age  
 4. Education (Highest Completed)  
 5. Household Income  
 6. Gender

## Customize Detail View

The **Detail View** refers to the data that is seen if a specific individual response is clicked.

1. If you wish to customize the data within this view, click **Edit** to the right of the Table and select **Customize Detail View**. All pages and questions will be selected by default.

**Chart Type**

Title  
Response Table

[Edit Description](#)

[Customize Grid Columns](#)

[Customize Detail View](#)

2. Uncheck any questions or pages you wish to exclude from view in the Individual Response. Click Done.

**Customize Individual Response Details View**  
Select the questions to include in the individual response grid.

(untitled)

(untitled)

1. How satisfied are you with our products and services?

2. How likely are you to recommend our products and services to your friends and family?

3. Age

4. Education (Highest Completed)

5. Household Income

6. Gender

[Never Mind](#) [Done](#)

3. Click Save to return to your Standard Report.

## Report Options

In the **Report Options** menu found in the upper right of your report you will have a number of different display options, too many to cover here but we'll highlight a few.

**Report for Employee Engagement & Workplace Happiness**

Oct 28, 2020

Response Counts

Completion Rate:	100%	<div style="width: 100%;"></div>
Complete		<div style="width: 80%;"></div>
		21
		Total: 21

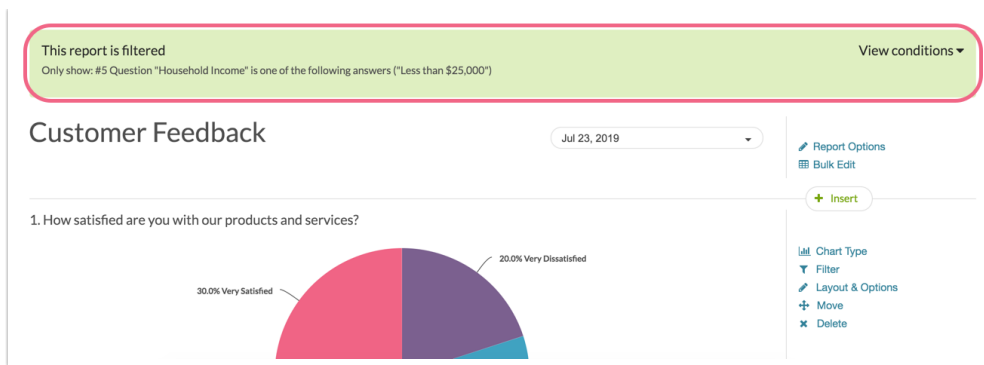
**Report Options**

- Bulk Edit
- Insert
- Chart Type
- Filter
- Move
- Delete
- Insert

## Filter Details

By default, any time you apply filters, both [overall filters](#) and [individual element filters](#), to your Standard Report the details of these filter conditions will be displayed in your report.





If you prefer to turn the filter details off for the entire report go to **Report Options > Layout** and uncheck **Filter Details** from the **Show the Following** section.

### Edit Report

OVERALL OPTIONS   BULK EDIT   CUSTOM CSS

Report Name  
Report for Employee Engagement & Workplace Happiness

Layout

Show the Following

- Filter Details
- Chart
- Word Cloud
- Summary Table
- Statistics Table
- Questions With no Data
- Use Question Alias as Title

### Question Numbering

Under **Report Options > Layout > Question Numbering** you can choose from the below options for numbering reporting elements:

- No Numbers
- Original Question Number From Survey
- 1, 2, 3, ...
- A, B, C, ...

### Report Language

Have you added [Translations](#) to your survey? Change your Standard Report language by heading to **Report Options > Language** and selecting an available language from the **Report Language** menu.

## FAQ

- ⊕ How Do I Add/Remove Questions?
- ⊕ How Do I Report on Table Rows Separately?
- ⊕ How Do I Remove N/A Answer Options?
- ⊕ How Do I Customize Statistics?
- ⊕ How Do I Download a Hard Copy of the Report: PDF or Print
- ⊕ Why Did Alchemer Create This Report?
- ⊕ Important Notes About the Data That Displays in Your Report

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