



Quick guide

Analysis report

Distributed by Interresearch als

July 2021

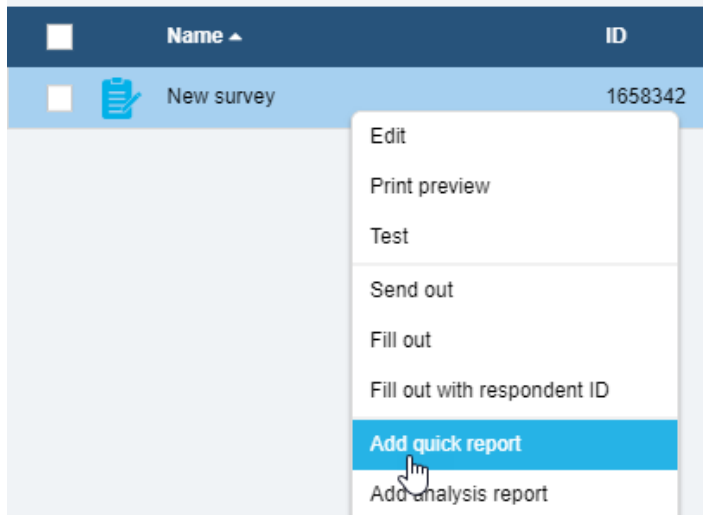
defgo

Contents

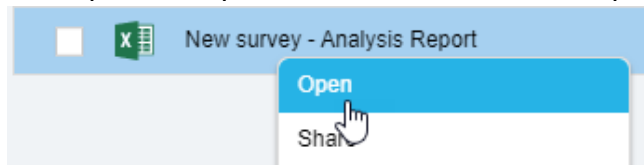
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Quick report

1. To get a quick overview of incoming respondent answers, you can create a report with default settings with no more three clicks. Click on your survey and select **Add quick report**.



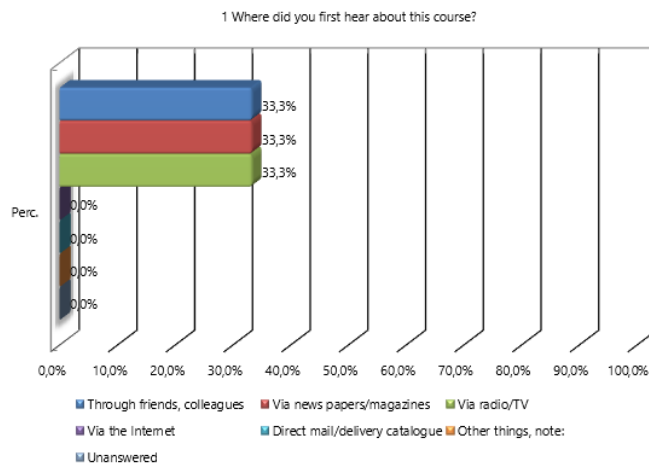
2. The report is outputted in Excel. Click on the report and select **Open**



3. The standard report contains front page, status text, tables and graphs (horizontal bars) for all questions, designed with defgo's colors and logo.

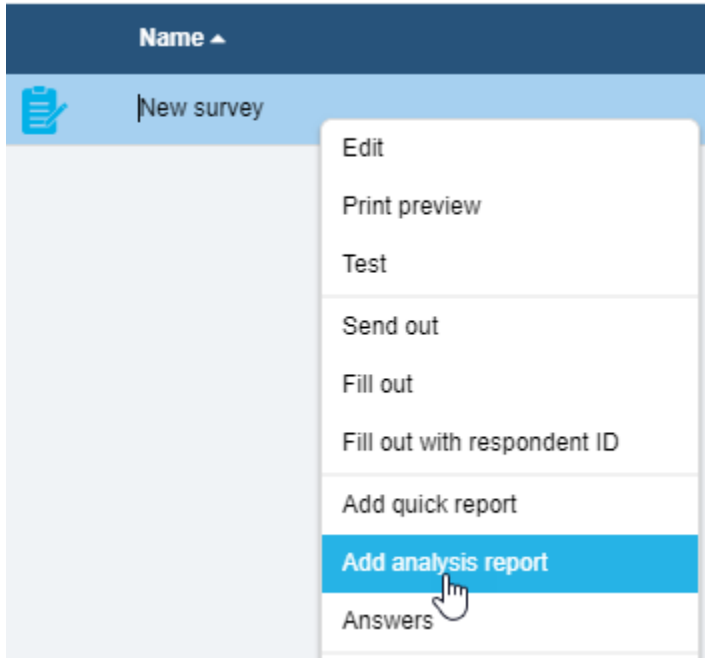


This report contains answers for 3 respondents, and the survey has a response rate of 0%.
The survey was carried out from 25/06/2021 to 25/09/2021.
The report was generated at 14.7.21 17:43.

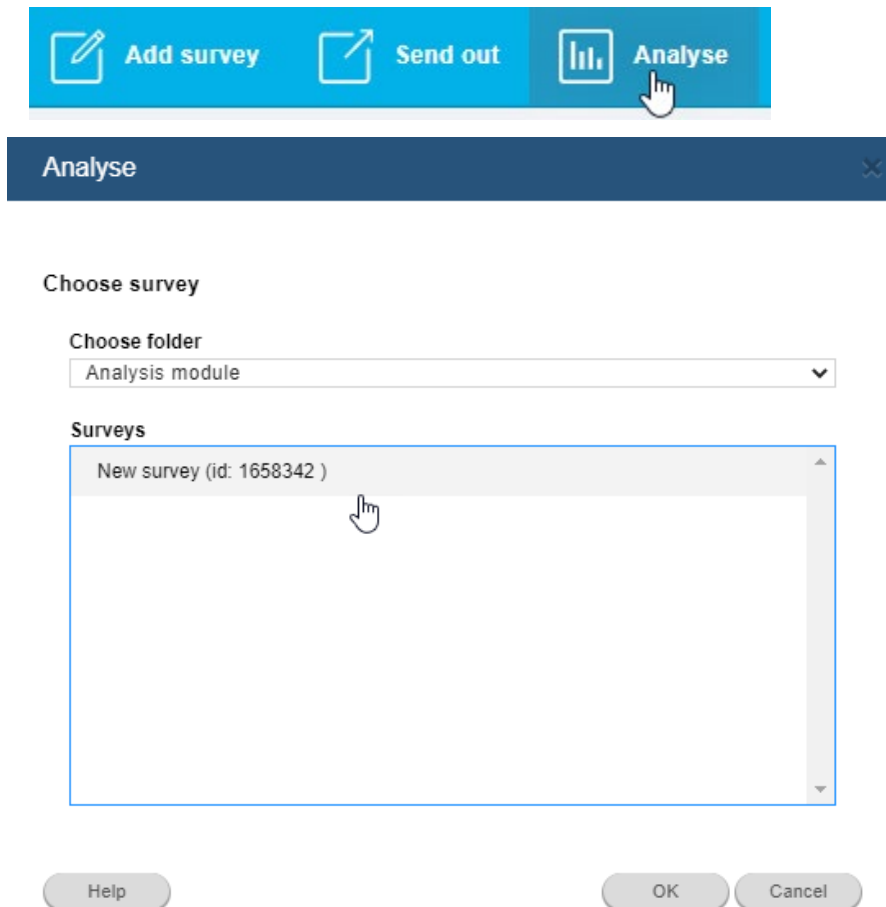


Advanced report

1. To create an advanced report with special settings, click on the survey and select **Add analysis report**.

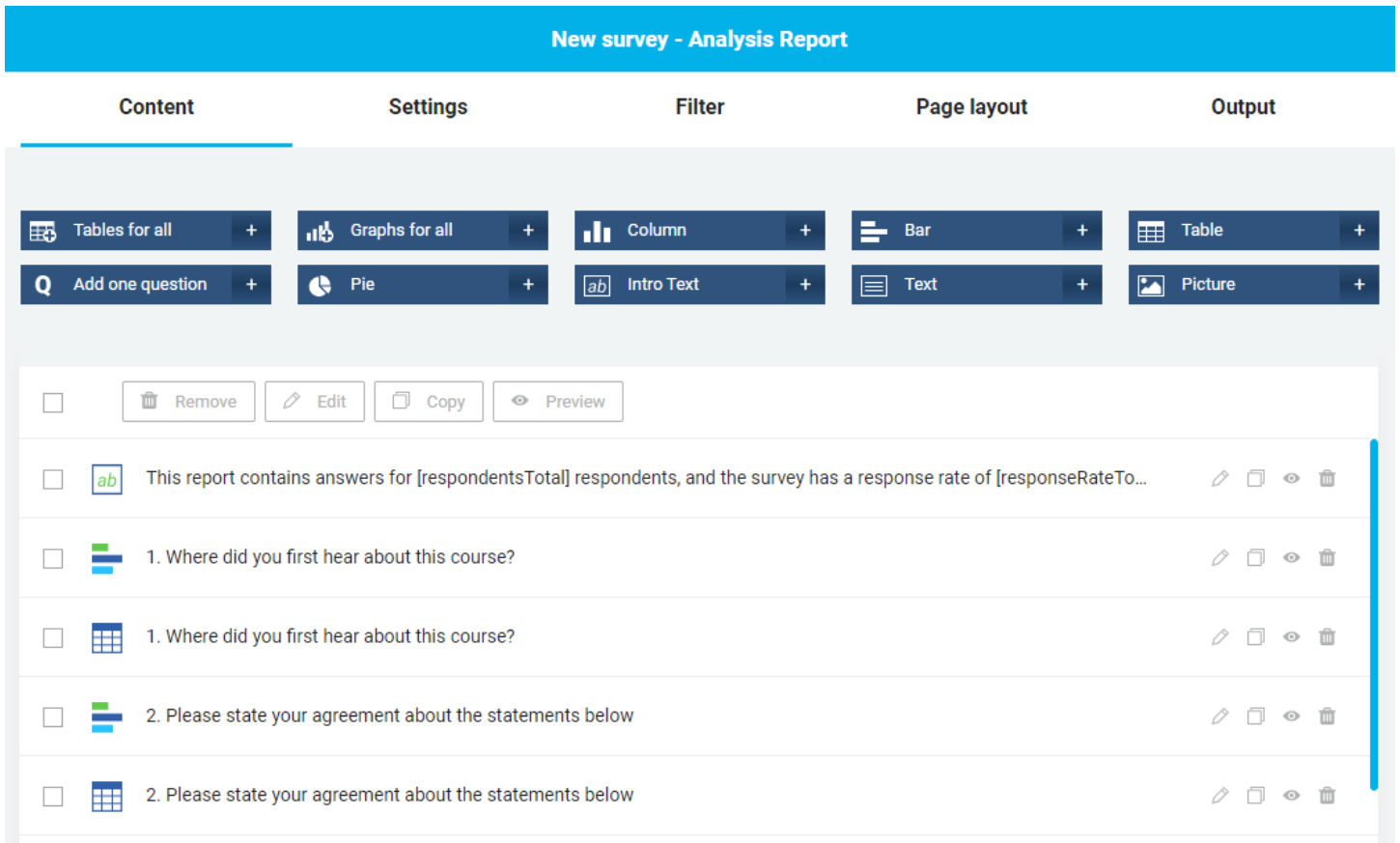


2. Or click Analyse icon in the top menu. Then select the survey for which you are creating a report.

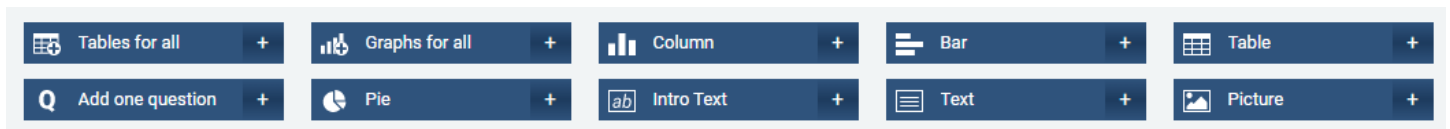


3. You will then come to analysis wizard with 5 tabs.
4. a. In the first tab **Content** you decide which questions you want to include in the report, how the questions should be displayed and the order of them.

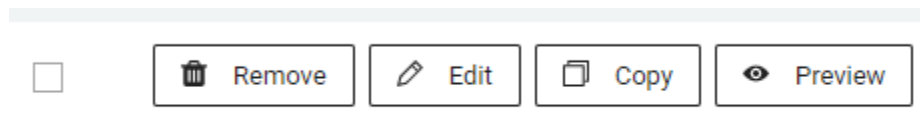
When you open **Content** for the first time, the list is filled in by default with tables and graphs for each question, as well as introduction text with background data.



- b. In the top you can add elements by clicking the plus icon.

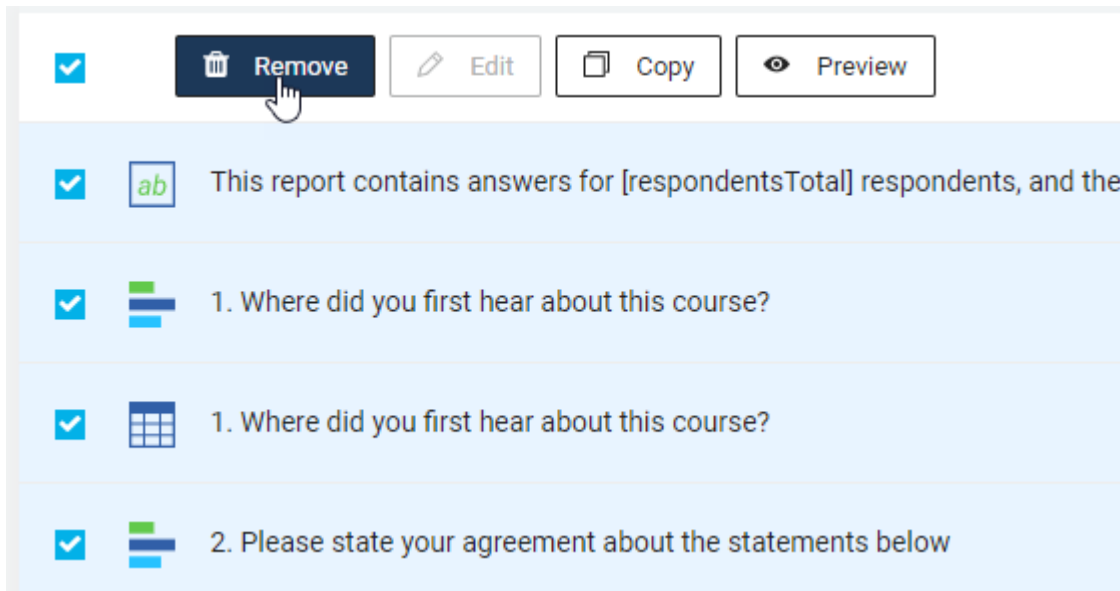


You can edit multiple elements simultaneously, use the editing menu below the elements.

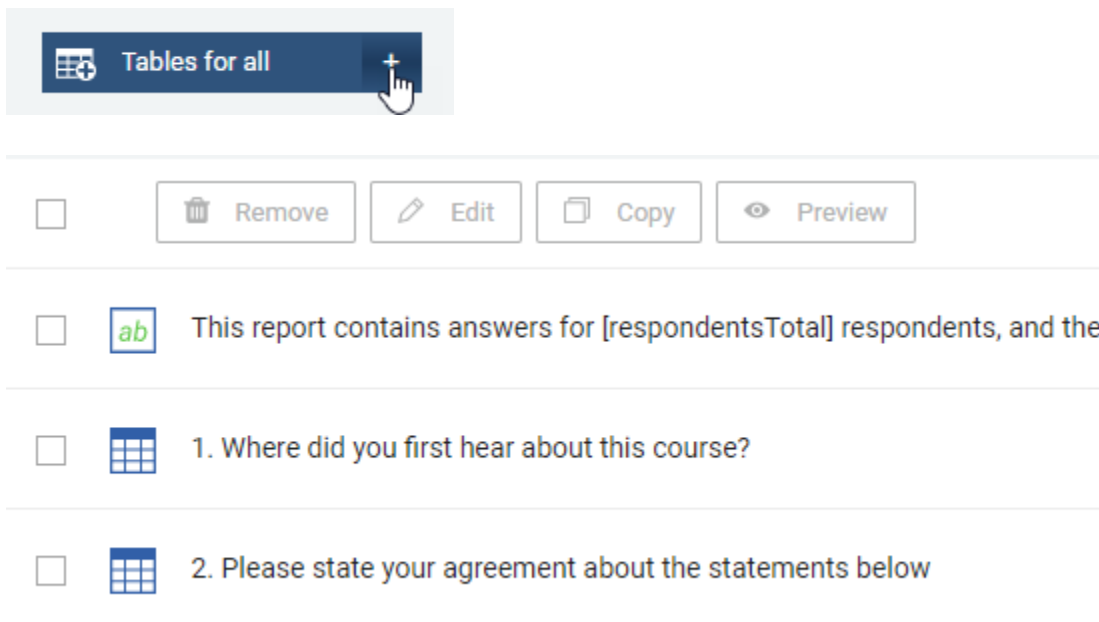


Elements menu:

Tables for all lets you add tables for each question in the survey to the list of elements along with an introduction text with background data. If you do not need graphs in the report, select all items and remove them.



After that add **All tables** instead.



Graphs for all adds tables and graphs for each question to the list of elements.

Column will create a column chart based on the selected question.

Bar will create a bar chart based on the selected question.

Table will create a table based on the selected question.

Add one question will add a single element to the list. Click on it and choose the question for which should be created an element in the **Data** tab. As default the element is added as **Bar**. In the tab **Choose type** you can change to other type of element.

Pie will create a circle diagram based on the selected question.

Introduction text is used for adding information about the survey in the report. The text created by default can be changed. You can use short codes as:

[respondentsTotal] - the total number of respondents, participating in the survey;

[responseRateTotal] – response percent for the respondents;

[surveyStartDate] and **[surveyEndDate]** – date for survey start and ending;

[filter] – filter, used for creating the report;

[respondentsFilter] - number of answers fulfilling the filter settings;

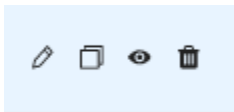
[reportCreationTime] – time of report creation.

Text lets you add your own text in the report. This can be an introduction text or an explanation of the report or graphs.

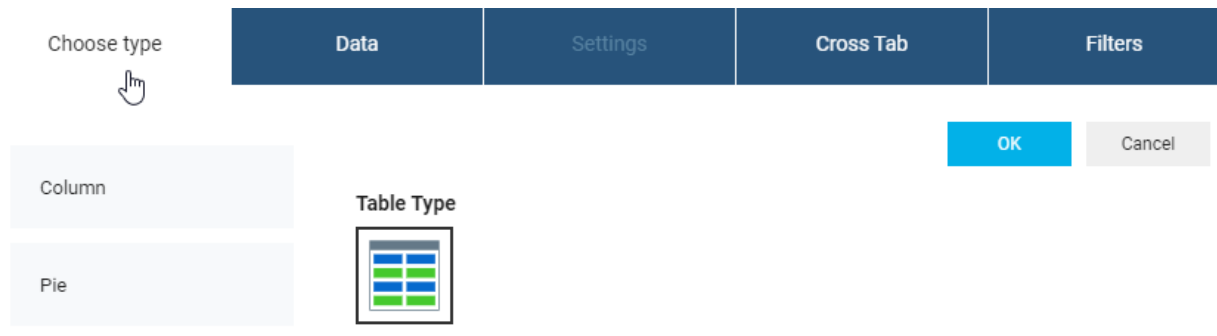
Picture will add a picture in the report. In the tab **Picture settings** you can edit settings for the picture.

To add the picture saved on your computer, copy the Image URL and insert in **Image URL**. To add an image uploaded to your folder, select the image from the drop-down menu.

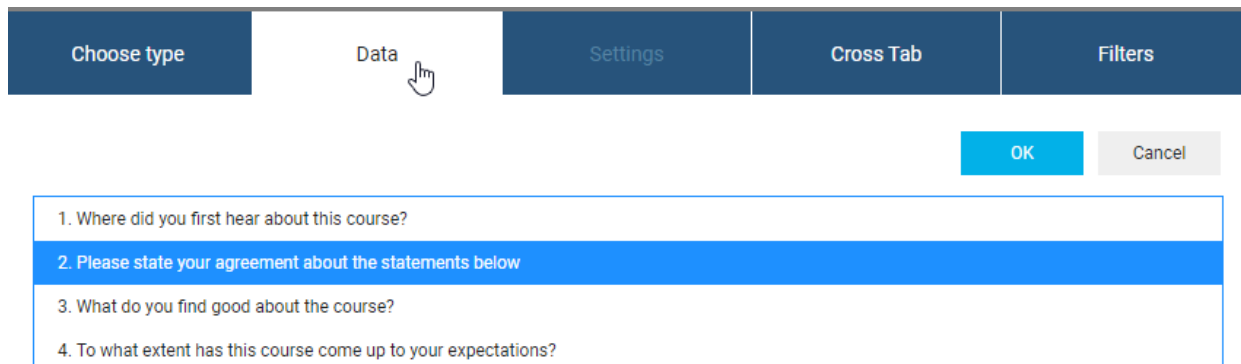
- c. Right next to each element are buttons - **edit, copy, preview** and **remove**.



- d. By clicking **Edit**, you can change the element type in **Choose type**.



You can change the question in **Data**:



You can add **Cross Tab** the selected question. The function is used to clarify linear relationships in the data material. Two questions can be crossed. One question is often a background question, and the other is a superior question (e.g. 'overall satisfaction'). By combining filters, you can obtain a more in-depth analysis. Go to the **Cross Tab** and tick the check box **Cross-tabulate question**. The field for selecting additional questions will be available. Select available questions, for example, it will be question number 4.

The interface shows a configuration window for a Cross Tab. At the top, there are five tabs: 'Choose type', 'Data', 'Settings', 'Cross Tab', and 'Filters'. Below the tabs, there is a checkbox labeled 'Cross-tabulate question' which is checked. To the right of this checkbox are 'OK' and 'Cancel' buttons. Below the configuration area, there are two panels: 'Available questions' and 'Selected questions'. The 'Available questions' panel contains a list of seven questions. The 'Selected questions' panel contains question 4, 'To what extent has this course come up to your expectations?'. Navigation arrows are present between the panels and on the right side of the 'Selected questions' panel.

Click on OK and save the report. As a result, the table is added:

1. Where did you first hear about this course?

		Through friends, colleagues	Via news papers/magazines	Via radio/TV	Via the Internet	Direct mail/delivery catalogue	Other things, note:	N/A	Total	Basis
4. To what extent has this course come up to your expectations?	Far beyond my expectations	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0	0
	Beyond my expectations	50.0%	0.0%	50.0%	0.0%	0.0%	0.0%	0.0%	2	2
	As expected	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1	1
	Below my expectations	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0	0
	Far below my expectations	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0	0
	Don't know	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0	-
	N/A	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0	-
	Total		1	1	1	0	0	0	0	3

As you can see in the picture above, the cross-table shows the number of respondents who have chosen the same answer alternatives to the questions.

You can add **Filter**. Go to **Filters** and tick the check box **Local filter**.

Each tab in the left navigation menu corresponds to the one type of filters. You can configure the filtering options at each tab - they will all be saved and used in the report.

When all filter settings are specified, click **OK**.

Choose type Data Settings Cross Tab Filters

Global filter Local filter

Select filters

- Questions and panel +
- Time +
- Respondent ID +
- Session ID +
- Group ID +

Filter on question

1. Where did you first hear about this course? OK Cancel

- Through friends, colleagues
- Via news papers/magazines
- Via radio/TV
- Via the Internet
- Direct mail/delivery catalogue

- e. You can also just click an element and use the functions: **Change type**, **Select data** and **Filters**. Select function and you go directly to a specific tab in pop up.

1. Where did you first hear about this course?

2. Please state your agreement about...

Change type
Select data
Filters

5. In the next tab **Settings** you control general settings for the report as calculations, matrix graphs, text elements, report language.
- a. In **Calculation** select which statistics (mean, index, standard deviation, etc.) you want to include in the report. For some of them, you can also specify the number of decimals. Click on question icon to get the explanation of what the individual calculations means.

Content	Settings	Filter
Calculation		
Calculation	<input type="checkbox"/> Absolute numbers	
Matrix graph	<input checked="" type="checkbox"/> Percentage	
Display text	Decimal <input type="text" value="1"/>	
Report language	<input checked="" type="checkbox"/> Include unanswered	
	<input checked="" type="checkbox"/> Mean	
	Decimal <input type="text" value="1"/>	
	<input checked="" type="checkbox"/> Calculate mean for matrix questions only	
	<input type="checkbox"/> Include mean from other survey	
	<input type="checkbox"/> Index	
	<input type="checkbox"/> Std. dev.	
	<input checked="" type="checkbox"/> Basis	
	<input checked="" type="checkbox"/> Totals	

You can also include mean from the other survey, which has the same structure.

Include mean from other survey

b. In the next tab select how graphs of Matrix questions are generated.

Matrix graph

- Only Mean and Index graph - if Mean/Index chosen
- Several graphs – one for each answer alternative
- One graph - for the whole question (for Bars and Columns)

c. In **Display text** select which elements will be included in the report.

Display text

- Question numbers
- Question type
- Include open answers
- Hide answer options containing no answers

Add

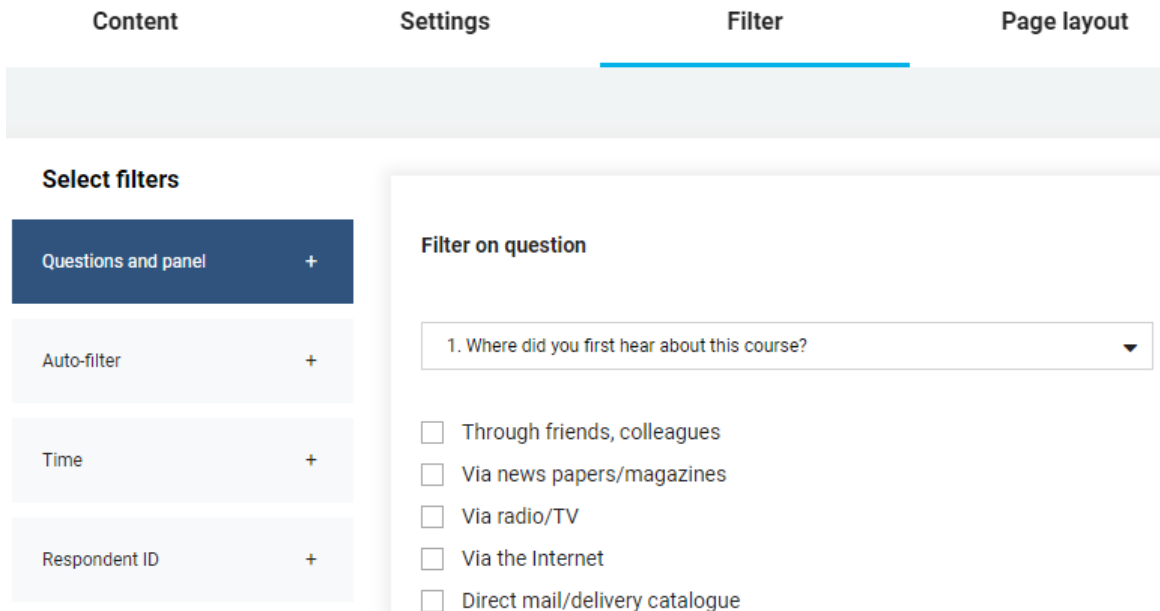
d. In **Report language** you can change language version and system language, if it's necessary.

Report language

Language version

System language

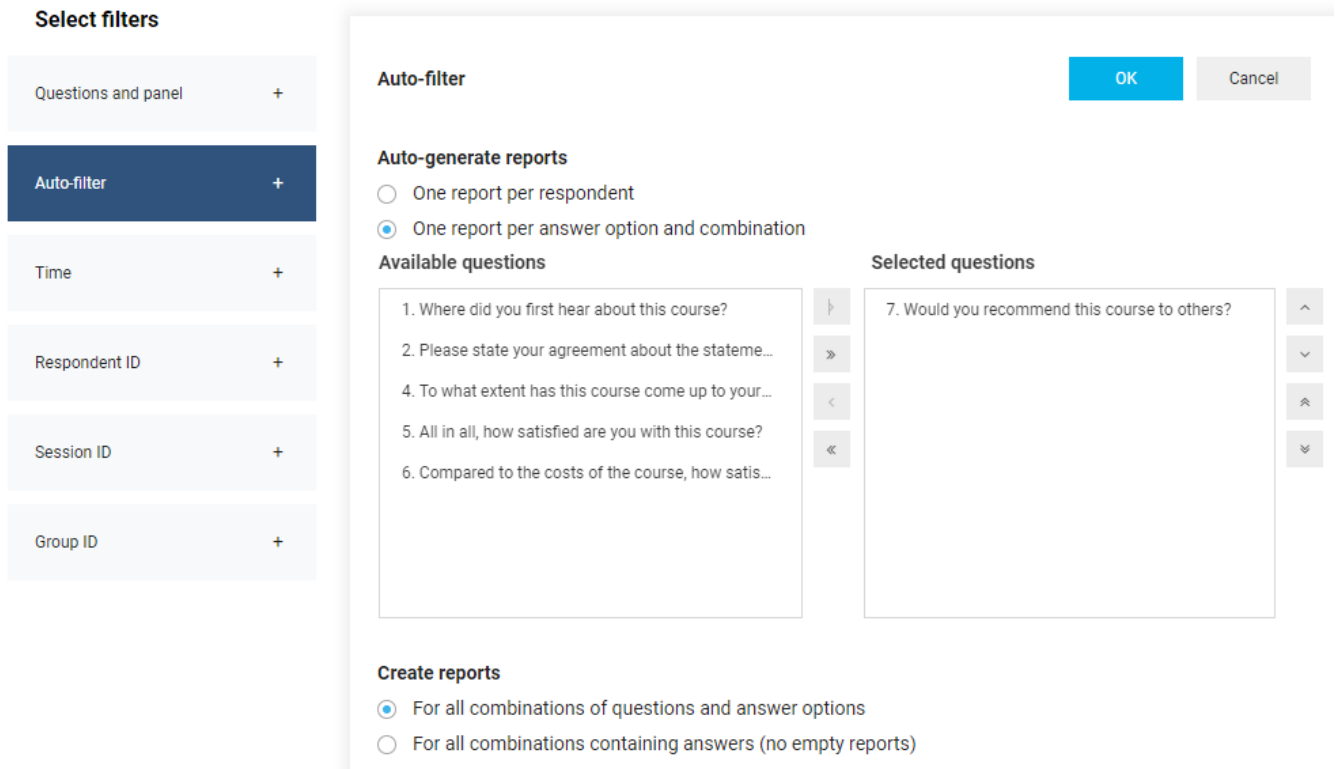
6. In the next tab **Filter** you can add and edit filters like in the **Content** tab, plus in this tab you can use **Auto-filter**.



With **Auto-filter** you can choose all answer combinations for one question, and create, for example, 200 reports in one click. You can create **1 report per respondent**, or **1 report per answer option and combination**.

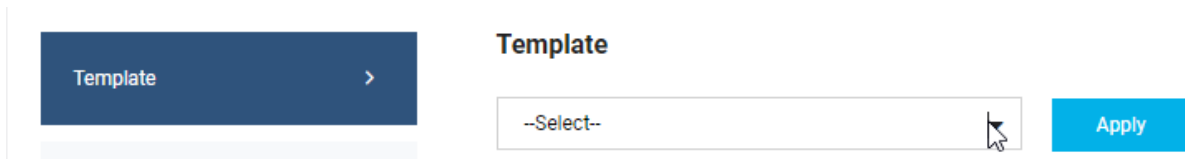
If **1 report per answer option and combination** is selected, you can choose one of the following possibilities:

- «create reports **for all combinations of questions and answer options** » allows to create full set of reports, even if some of the them will remain empty (i.e. survey doesn't contain answers that meets the criteria)
- «create reports **for all combinations containing answers (no empty reports)** » allows to create a set of reports, which at least include one answer



7. In the next tab **Page Layout** you can change the design of the report.

a. You can apply your own **template** with all necessary settings. (see page 17 how to create a template)



b. You can change **fonts and colors**, the layout of graphs and tables.

A screenshot of the 'Fonts and colors' settings panel. On the left is a sidebar with navigation options: Template, Fonts and colors (selected), Images, Orientation, Margins, Header and footer, Breaks, and Content. The main panel is titled 'Fonts and colors' and includes:

- 'Select report theme color' with a dropdown set to '#018AB8' and a color swatch.
- 'Base color' with a dropdown set to 'Theme color'.
- Six 'Accent' options (Accent 1 to Accent 6) with color swatches and hex codes: #4F81BD, #C0504D, #9BBB59, #8064A2, #4BACC6, and #F79646.
- An unchecked checkbox labeled 'Bars and columns in the same color (no legend in chart)'.
- Three font settings: 'Select font for body text', 'Select font to questions', and 'Select font to answers', each with a dropdown set to 'Segoe UI', a size dropdown set to '8', and a color dropdown set to '#000000' with a black swatch.

Below this is the 'Table and graph style' section:

- 'Table style' with two preview boxes: one showing a simple grid and another showing a grid with blue shading.
- 'Graph style' with three preview boxes showing different bar chart styles: a simple bar chart, a bar chart with horizontal grid lines, and a bar chart with a legend.

c. You can add **logo** and the **image** that will be used for the creation of the front page.

Template >

Fonts and colors >

Images >

Orientation >

----- >

Select logo

Image (URL)

Image (file) -- Select -- ▾

Select frontpage image

Image (URL)

Image (file) -- Select -- ▾

d. You can change page direction in the tab **Orientation**.


Template >


Fonts and colors >

Images >

Orientation >

Orientation

 Portrait

 Landscape

e. You can edit **margins**.

Template >

Fonts and colors >

Images >

Orientation >

Margins >

Margins

Top

Bottom

Left

Right

f. **Header and footer** are filled in with information about the name of the report and defgo's contact information by default. You can change text for header and footer and include page numbers in the report.

Header and footer

- Header
- Footer
- Show page numbers

g. In **Breaks** you can specify grouping of items (tables and graphs) in the report.

Breaks

- One item per page
- Compact arrangement of items
- Group by the question

h. In **Content** you specify whether you want to include front page and the report status text into the report. The front page text is the first page of the report including its name and implementation date.

The report status text is the last page of the report with general information on:

- company name
- time of Implementation for the report
- number of answers
- number of invited respondents per email
- answer percentage for the survey

Template >	Content
Fonts and colors >	<input checked="" type="checkbox"/> Front page
Images >	<input checked="" type="checkbox"/> Status text
Orientation >	
Margins >	
Header and footer >	
Breaks >	
Content >	

Front page text:

This report contains answers for 3 respondents, and the survey has a response rate of 0%.
The survey was carried out from 25/06/2021 to 25/09/2021.
The report was generated at 14.7.21 16:19.

Status text:







Executed by: XXXXXXXXXXXX
Company name: XXXXXXXXXXXX
Date of execution: 12.7.21 22:00
Number of answers: 3
No. of invited respondents (by e-mail): 0
Answer percentage: 0%
Info: Data collection not ended.

8. In the next tab **Output** you choose report format: Excel, Word, PDF, PowerPoint, HTML or HTML Dashboard.

Choose folder

Analysis module

Select format

EXCEL <input checked="" type="checkbox"/> 	WORD <input type="checkbox"/> 	PDF <input type="checkbox"/> 
POWERPOINT <input type="checkbox"/> 	HTML <input type="checkbox"/> 	HTML (dashboard) <input type="checkbox"/> 

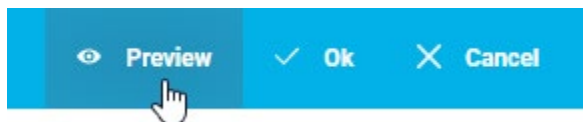
Template

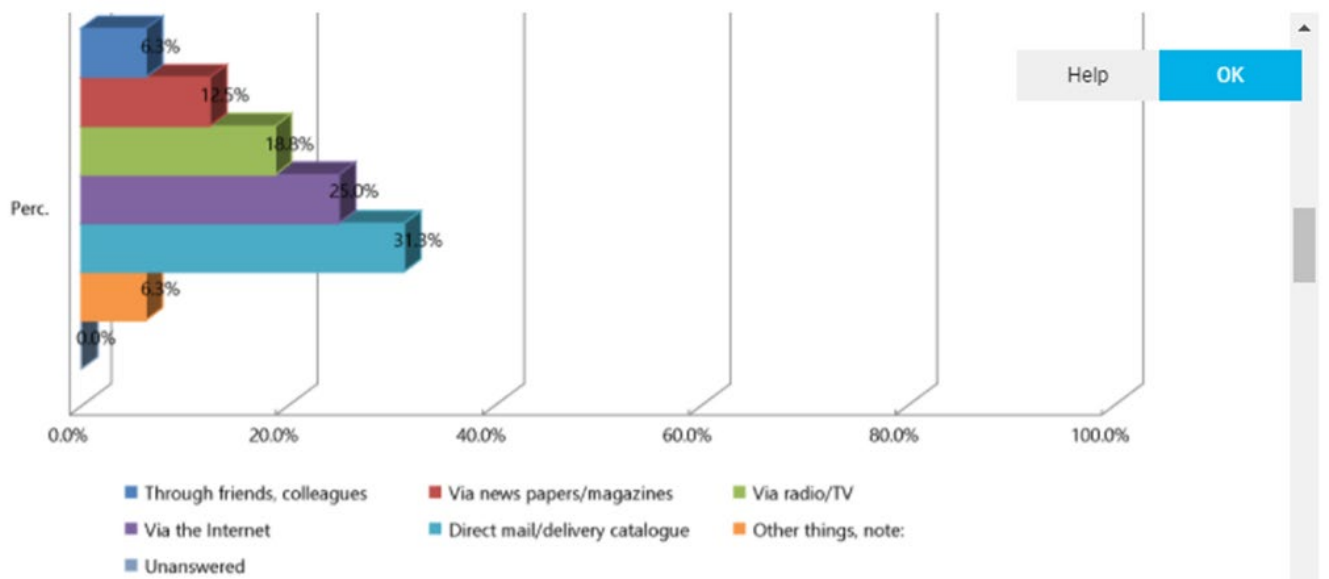
Check the field **Template** if you would like to save the report as a template.

Then you can load the template in the tab **Page layout**.

Template

9. You can preview the report by clicking **Preview** in the top menu.





1 Where did you first hear about this course?	Perc.
Through friends, colleagues	6.3%
Via news papers/magazines	12.5%
Via radio/TV	18.8%
Via the Internet	25.0%
Direct mail/delivery catalogue	31.3%
Other things, note:	6.3%
Unanswered	6.3%
Basis	16

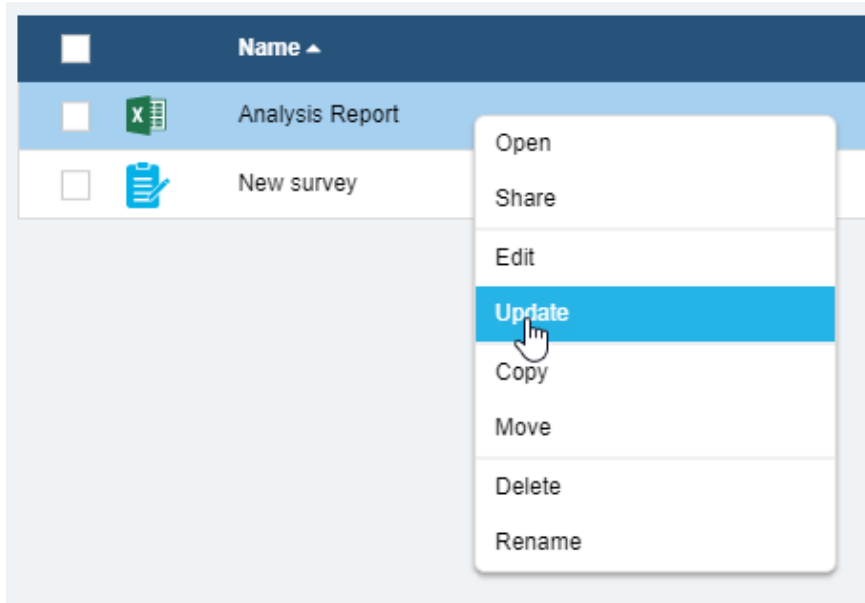
10. When everything is done, click **Ok** and all settings will be saved.



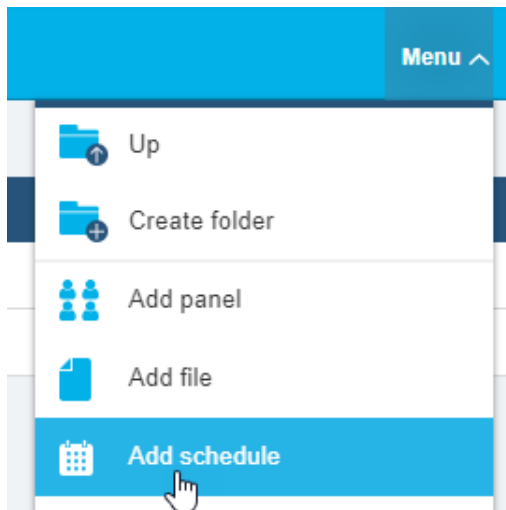
Update report

The report can be updated in two ways: by a manual update or an automatic update.

1. For a manual update click on the report and choose **Update**, and the report is updated.



2. For an automatic update – e.g. once a day – use the tool **Add schedule**. First open the folder with the report and then click **Add schedule** in the **Menu**.



3. In the first tab **Task** in **Object type** choose Report and select the needed report from the list.

Add schedule ✕

Task | **Schedule** | Notification

Title
Scheduled task(s): - 14-07-2021

Object type

- Report
- Export
- Panel
- Survey implementation - via e-mail panel
- Survey implementation - via Digital Post (e-Boks) panel

Task

- Auto update the selected item(s) below
- Auto update all items in the selected folder(s) below

Items

Analysis Report (id: 665420)



Run scheduled task at specified date

4. Go to the tab **Schedule**. Set **Start date** and **End date**, as default setting "today" is selected as start date, and end date is automatically set one month forward. Set the time. Then select how often the report should be updated in the dropdown menu **Schedule task**.



Add schedule ✕

Task | **Schedule** | Notification


Start date (dd-MM-yyyy) **End date** (dd-MM-yyyy)


14-07-2021  14-08-2021 

Execute at

04  00 

Schedule task

Weekly 

Every  week(s) on:

- Monday Friday
- Tuesday Saturday
- Wednesday Sunday
- Thursday

5. In the tab **Notification** you can define mail text and recipients of the notification, when the report is updated. Note, if you don't change data in **Notification**, a default email will be sent to the account owner each time the report is updated.

Add schedule✕

Task	Schedule	Notification
------	----------	--------------

Send notification mail

Subject

Sender email (e.g. your_name@your_company.com)

E-mail to (if left empty an e-mail is sent to owner of account)

Mail text format

E-mail text (use [XXX] to perform substitution)

Your defgo report is generated with scheduled task and is available on this link: [link]

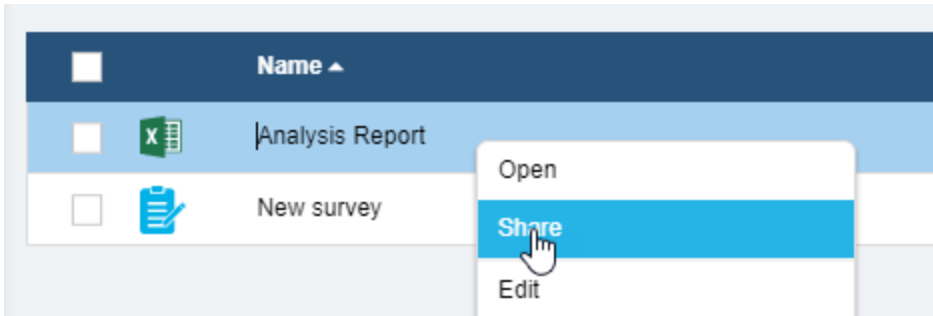
HelpOKCancel

Share report

You can create a link to a report and send it to those who need access to the report. This is practical in terms of following the response process via the report, which is updated automatically.

It means that with a click on the link you can go directly to a current report, which shows the updated answers. Therefore you don't need to log in defgo account each time, when you need to see the last version of the report.

1. Click the report and choose **Share**.



2. Type in start- and end date for report availability and enter the password if it's needed. Copy the link or just send it via email.

Share ✕

Allow to share Analysis Report

Sharing period:
 —

Password (optional):