

Cross-Survey Standard Reporting Overview

The Cross-Survey Reporting feature is only available to enterprise customers. If you are interested in Cross-Survey Reporting functionality, please [contact us](#) for additional information.

Cross-survey standard reports consolidate questions and elements from multiple surveys into one report, providing a comprehensive view of customer feedback that enables more accurate insights and informed decision-making.

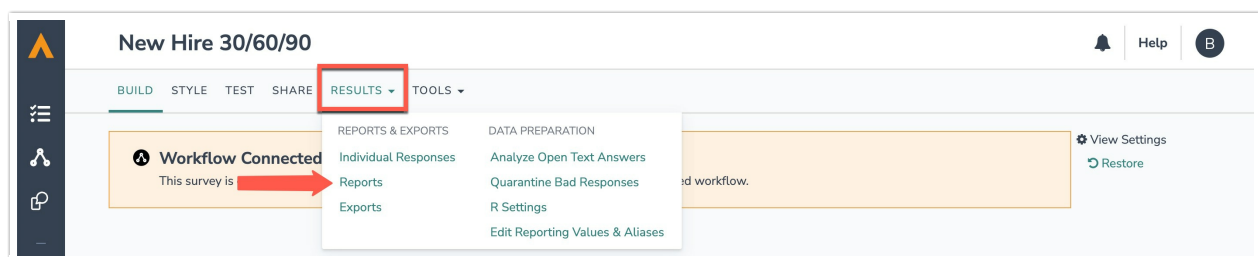
When adding cross-survey questions and elements, keep in mind:

- This feature differs from the [Combine Results](#) feature. The Combine Results feature allows you to include *data* from multiple *identical surveys* in a single report. The Cross-Survey Reporting feature allows you to add *questions and elements* from *different surveys* into a single report.

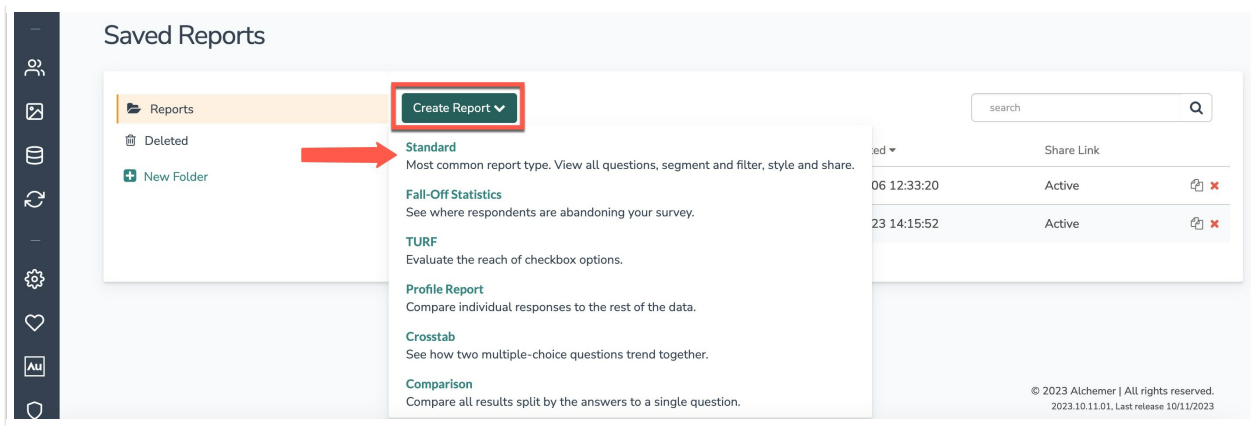
How to Use Cross-Survey Reporting

1. Select a parent survey to be your starting point and then navigate to the Reports page under the Results tab. Your parent survey could be a standard survey or a Global Question Library element.

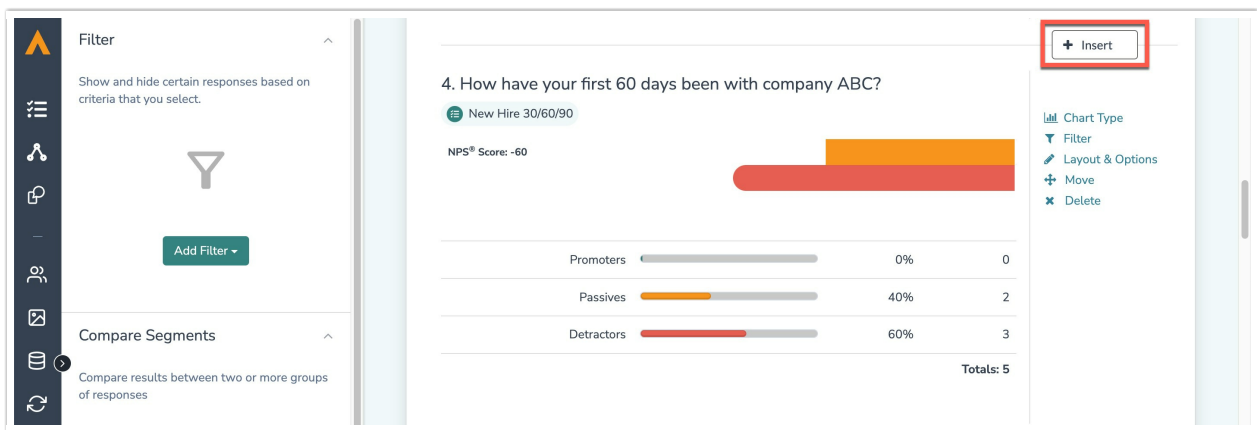
The parent survey is your starting point and will be the foundation of your cross-survey report. Every cross-survey standard report starts with a parent survey, before cross-survey questions and elements are added. Keep in mind, there are limited filtering options for cross-survey elements, while questions and elements from your parent survey have no filtering limitations.



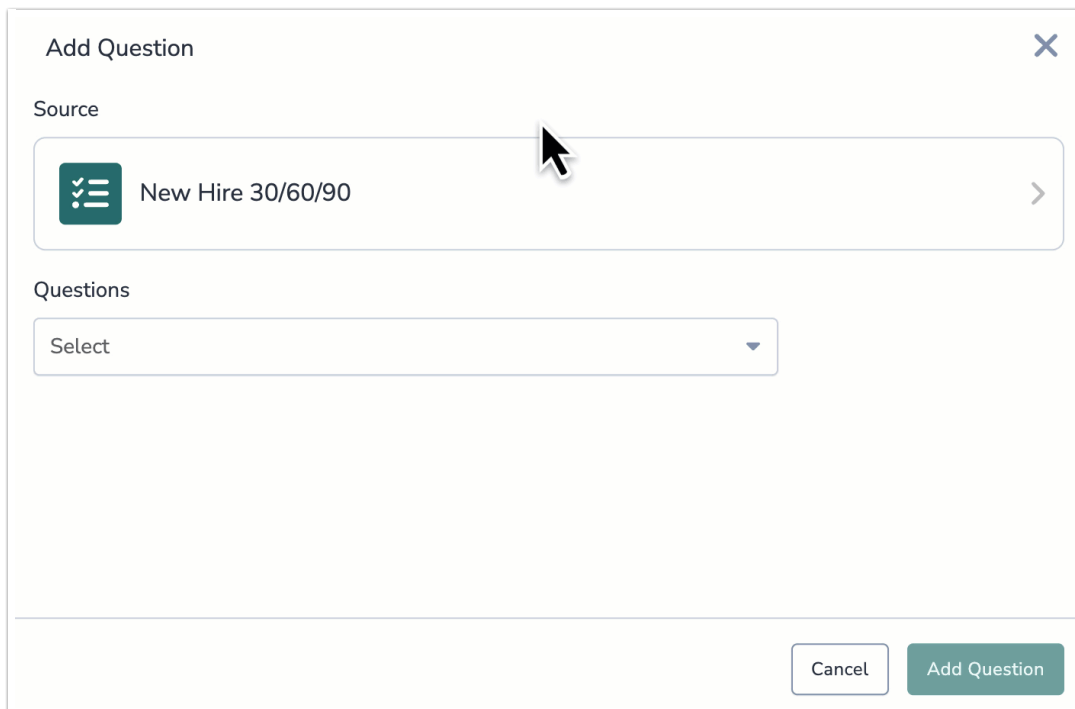
2. Create a new standard report.



3. To add cross-survey questions and elements, click the insert button and select your question type.



4. Choose the source for that question type.



There are two types of sources to choose from:

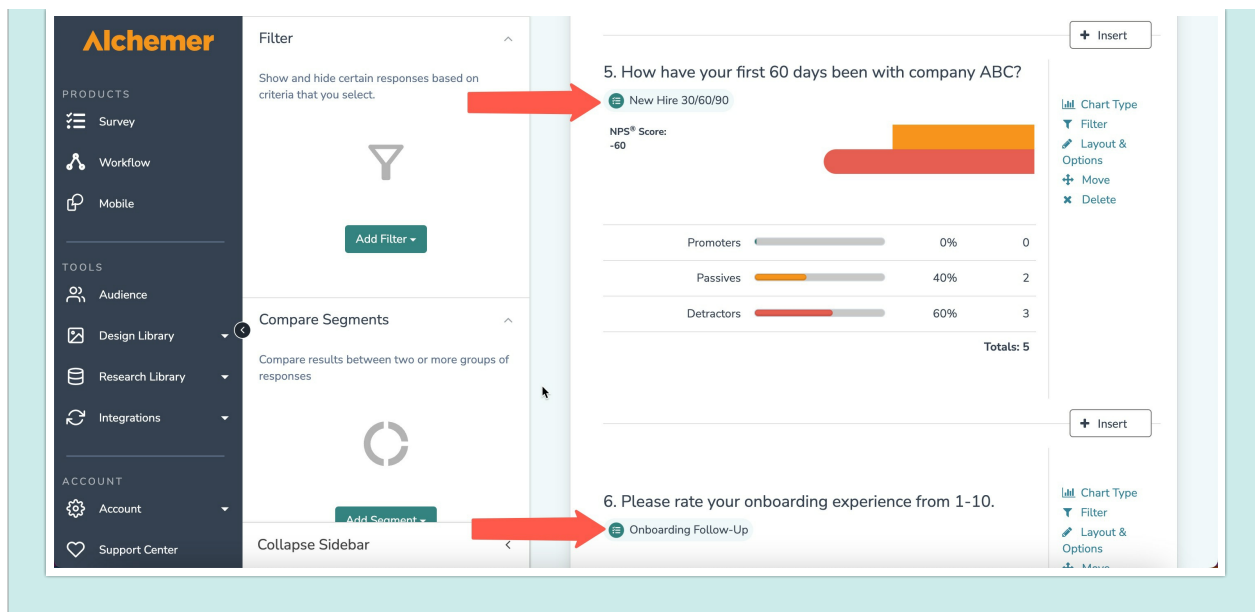
- **Surveys** that you have access to. These are highlighted in teal in the source selector.
 - Survey elements will include response data specific to the survey that element is coming from.
- **Global Question Library** elements that you have access to. These are highlighted in orange in the source selector.
 - Global Question Library elements will include response data from every survey that uses that global question or element.

5. After choosing a source, select the question or questions that you would like to add to your report.

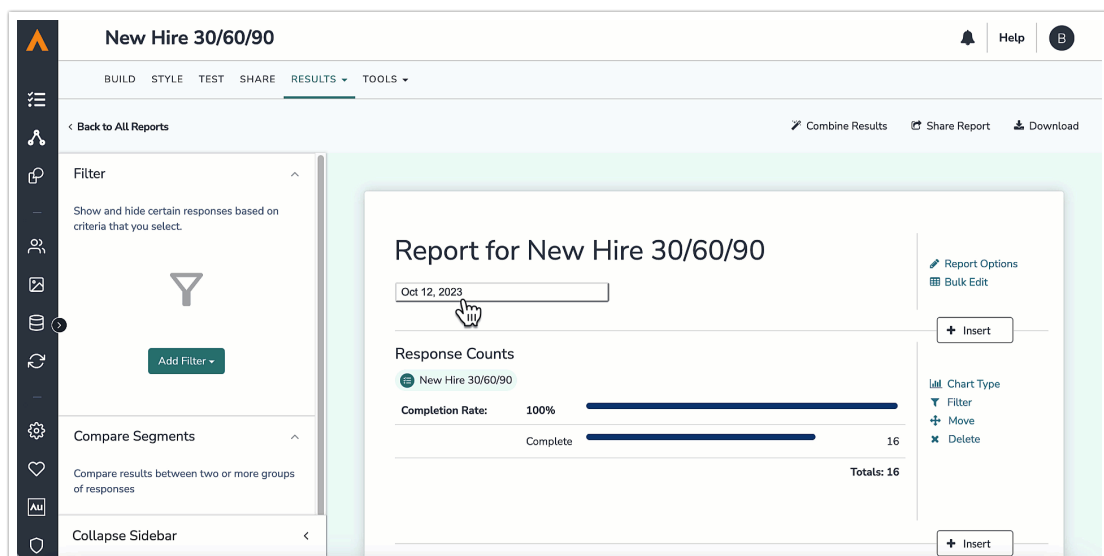
To add multiple questions, simply click on every question that you would like to add. A checkmark will indicate if the question is selected.

The screenshot shows a modal dialog titled "Add Question". At the top right is a close button (X). Below the title, there is a "Source" section with a dropdown menu displaying "Onboarding Follow-Up" and a right-pointing arrow. Below that is a "Questions" section with a dropdown menu displaying "Select" and a downward-pointing arrow. At the bottom right, there are two buttons: "Cancel" and "Add Question".

In the report builder, each survey element will have a tag identifying the element's source.




6. You can then apply 'response date' and 'response status' filters to all parent survey and cross-survey elements in your report.



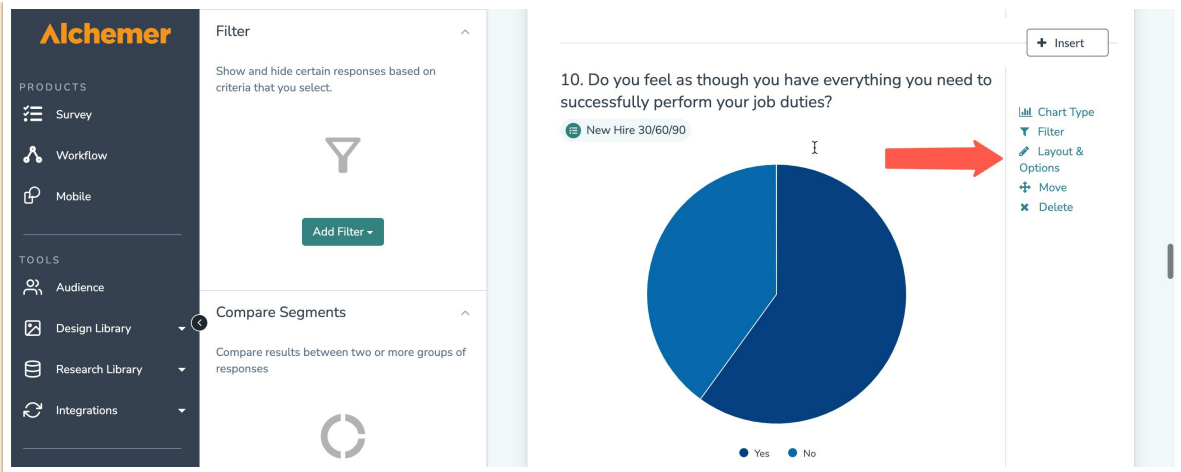
Filtering

The 'date' and 'response status' filters are the only filters that can be applied to all elements in your cross-survey standard report. Other filters will only filter elements from the parent survey. You will see the following message if you add filters not compatible with the cross-survey elements:

 Some of your filters cannot be applied to this question. [Learn More](#)

If you want to add additional filters for cross-survey questions or only to specific questions from the parent survey, you can do so in the filter options for that individual element. See steps below:


1. Open the Layout and Options editor for the specific questions



2. Navigate to the Filter tab and add additional filters to the cross-survey element or specific parent-survey element.

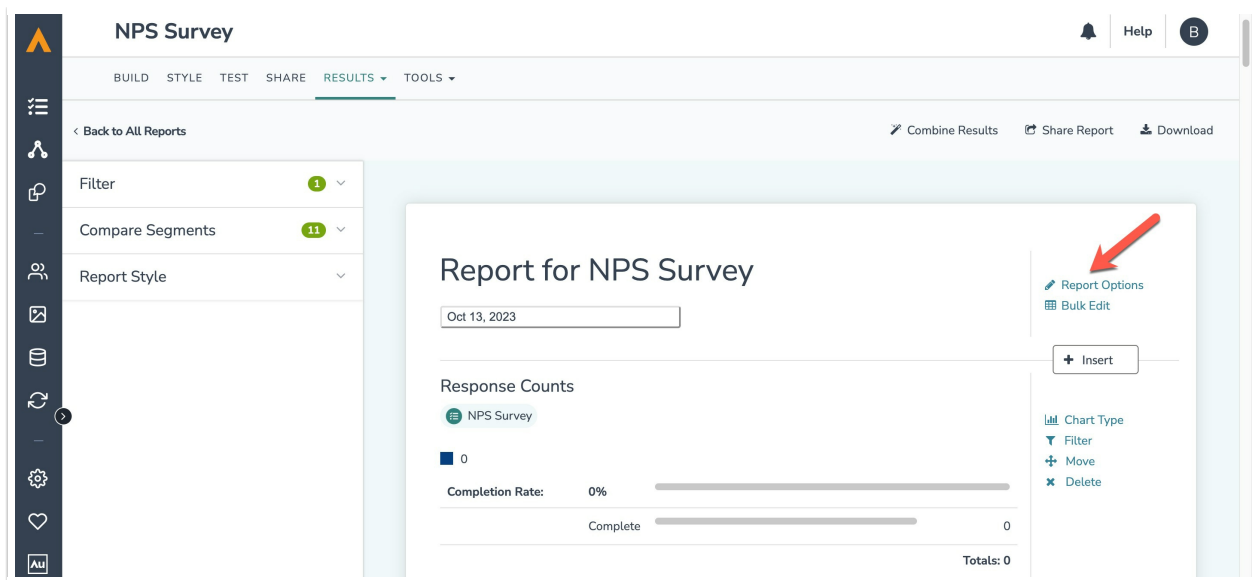
Segmenting

'Response date' and 'response status' are the only segments that can be applied to all elements in your cross-survey standard report. You will see the following message if you add segments not compatible with the cross-survey elements:

 Some of your segments cannot be applied to this question. [Learn More](#)

7. You can also reorder questions as needed. Survey elements from the same source do not need to be grouped together. Additionally, elements from the parent survey do not need to be the first items in the standard report.

8. You can also modify the Report Options for cross-survey standard reports.



Report Options

In Report Options there are three tabs:

- Overall Options: No limitations. These options can be applied to all elements in a standard report that includes cross-survey elements.
- Bulk Edit: Some limitations. You cannot add a cross-survey element from the Bulk Edit tab. You can only add cross-survey elements from the main report view.
- Custom CSS: No limitations. These options can be applied to all elements in a standard report that includes cross-survey elements.

9. Feel free to customize the report with your brand's style. Any changes you make to the report style will apply to both parent survey and cross-survey elements.

10. Finally, you can utilize all the normal standard report sharing and downloading capabilities after adding cross-survey elements to your standard report. [Learn more about the options available to share your standard report.](#)

Downloads and Shared Reports: Survey/Source Tags and Filter Segment Warnings

By default, source tags and filter segment warnings are hidden in Downloads and Shared Reports. If you would like to include these items in your Downloads or Shared Reports, check the highlighted boxes below.

Download

Select your Download Format

PDF

Options

- Insert a page break after each question
- Include page numbers
- Include lists of open text answers
- Show Survey/Source Tags
- Show Filter/Segment Warnings

Customize the design of your PDF with the help of our Programming Services team!

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Cancel

Start Download

Share Report

Shareable Link

https://a.../sharing-reporting-48e427ed9d9e4d899725_854e4d899725

Copy

View

</> Embed on your website

Customize this link

Who can see this report

Anyone with the link

As long as someone has the link, they can see the report. Search engines can't...

Options

- Show Social Sharing Buttons
- Show Survey/Source Tags
- Show Filter/Segment Warnings
- Allow Date Filtering
- Allow Answer Option Filtering
- Allow Exports
- Email Report Automatically

IP Whitelist

IPv4 supported, please use CIDR block for ranges, comma delimited.

Report Expiration

11/07/2023

⚠ Note: Personally Identifiable Information (PII) (like email addresses or contact forms) is automatically excluded from publicly shared reports unless they are password protected. [Learn More](#)

Cancel

Save

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