
What are Synthesio Reports?

You don't have to be an expert to answer tough business questions and create visually appealing reports. Synthesio Reports puts you in control, providing an intuitive interface that allows you to build a reporting experience that *speaks to your business*. You can define your data-sets, select from various chart types, filter your dashboards with ease, and arrange and name your dashboards as you see fit. Plus, each widget is supplemented with an auto-generated contextual report that helps you glean even more insight.

An introduction

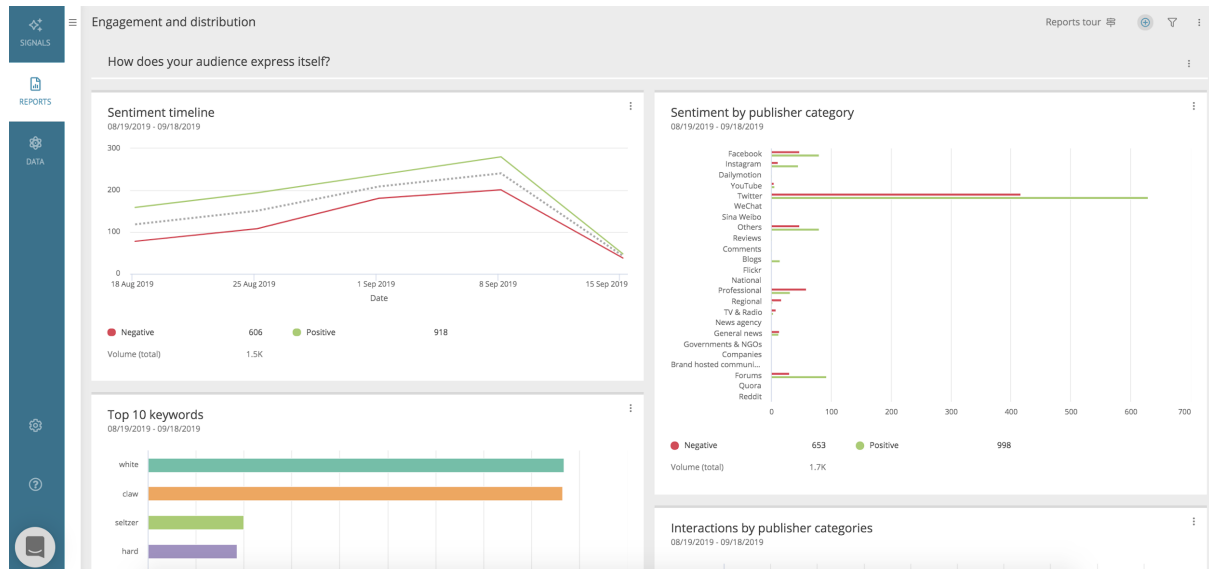
This section provides an introduction to Synthesio Reports. Let's start by naming and quickly explaining the new features that you will find:

1. **Creating and adding widgets** - Think of widgets as reporting visualizations. Widgets live within a dashboard. Synthesio Reports allows you to create new widgets by defining the data-dimensions, applying filters and selecting various chart types. Again, it's all about offering you greater customization. When accessing a page, applying filters or exporting, Synthesio widgets will wait until you actually need to load them for display in your reports so you can get the most notable points of your dataset.
2. **Editing existing widgets** - Even before creating new widgets, you will notice that Reports has auto-generated and/or migrated existing widgets within your dashboard (more on this later). You will have the ability to edit these existing widgets, changing attributes like the name, time period, dimensions and chart-type.
3. **Page layout features** - Finally, there's a number of actions you can take from the page:
 1. **Drag, drop and resize** - You can rearrange your dashboard by moving widgets around the page. You can also resize your widgets.
 2. **Page filtering** - You can filter the entire page - and thus its corresponding widgets - by all available filters.
 3. **Export and Delete** - You can export and delete entire pages, as well as individual widgets.

Let's give you a visual! First, let's assume that you or the Synthesio Team has already set up your dashboard and written your queries. The features and experience that we will cover

all take place after you have run your query. In our example, we ran a query about 'Spiked Seltzer'.

Here's your first look:



There's a couple of things to note up front.

First, in this example, the widgets you see in front of you are auto-generated by Synthesio. If you are starting from scratch, Synthesio will auto-generate two Pages (think of them as templates) - 'Engagement and Distribution' and 'Topics Performances'.

On the other hand, if you are migrating from the old to the new experience (i.e., you are *not* starting from scratch), you will see the new auto-generated pages *plus* migrated widgets from your dashboard from the old experience. These updated pages will be titled 'Analyze/ROI 1', 'Analyze/ROI 2', etc.

From here, there's a number of things you can do, like adding new widgets and creating new pages. In the top right of the Reports page, you will see three options. Moving from left to right, they are:

1. The Reports tour
2. 'Add a widget'
3. Apply filters across the page

Lastly, at the bottom left of the page, you will see another feature, the ability to create a 'New page'.

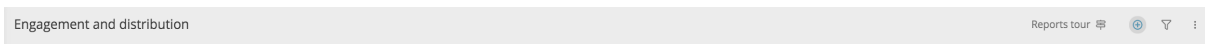
How to use Synthesio Reports

This section discusses how to use specific features.

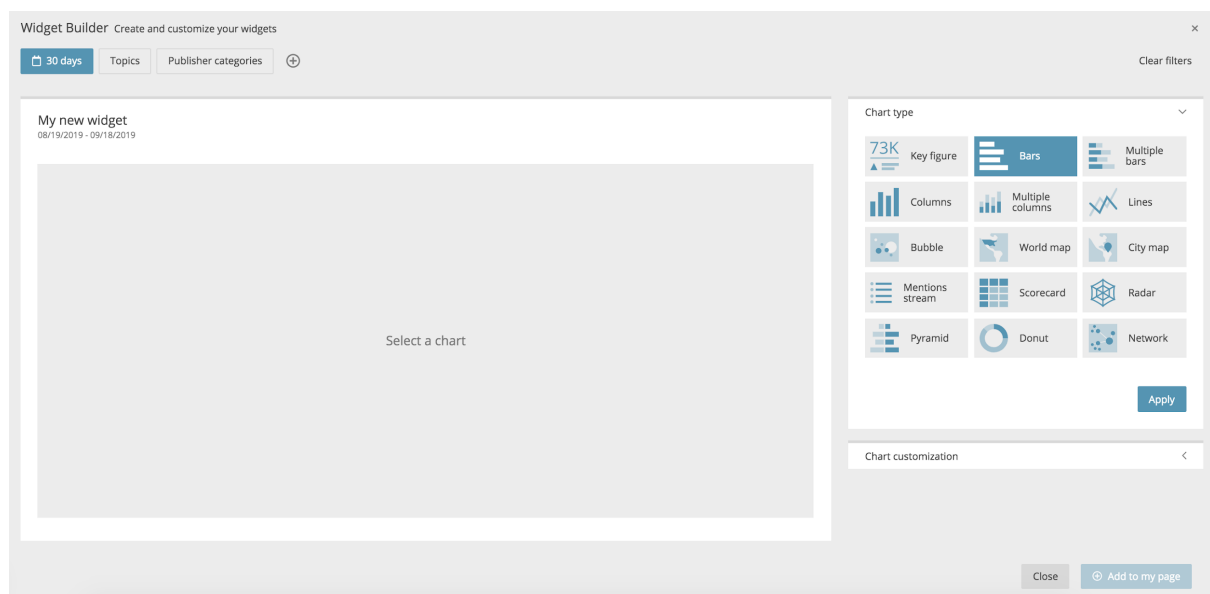
Creating and Adding Widgets

When you want to create and add a widget, go to the top right of the page and click the plus sign symbol.

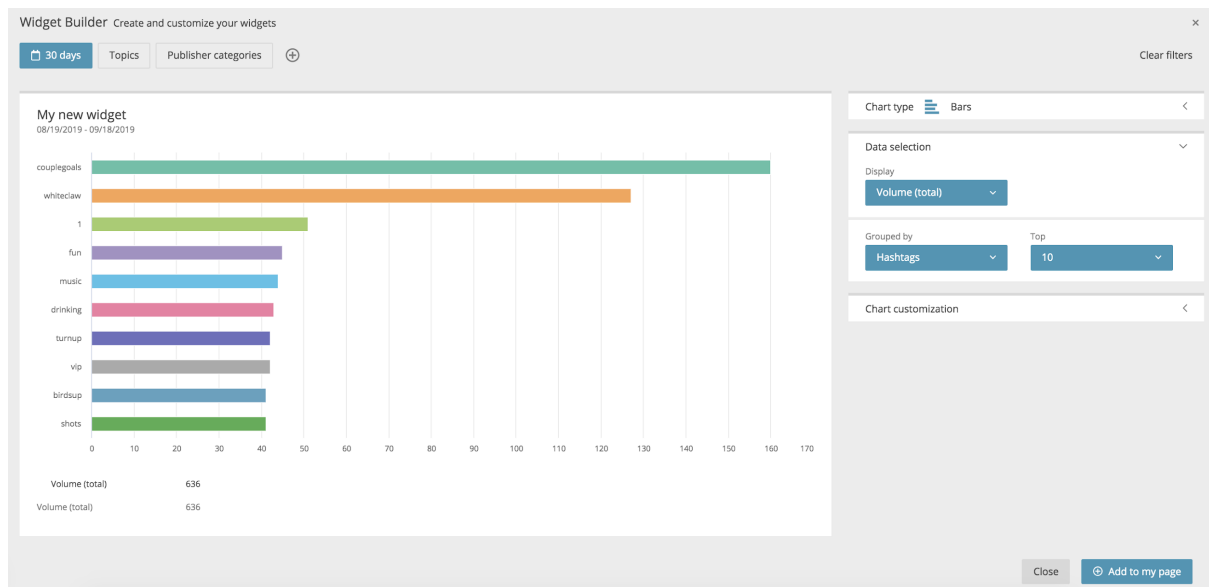
That will open up the widget builder.



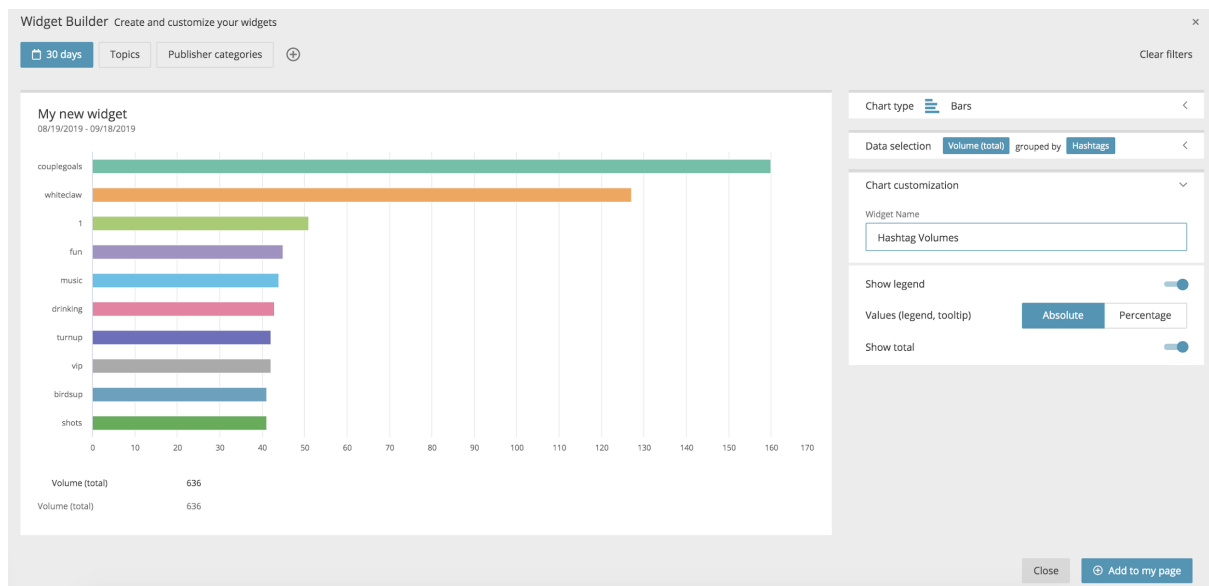
Step 1 - Select and apply a chart type



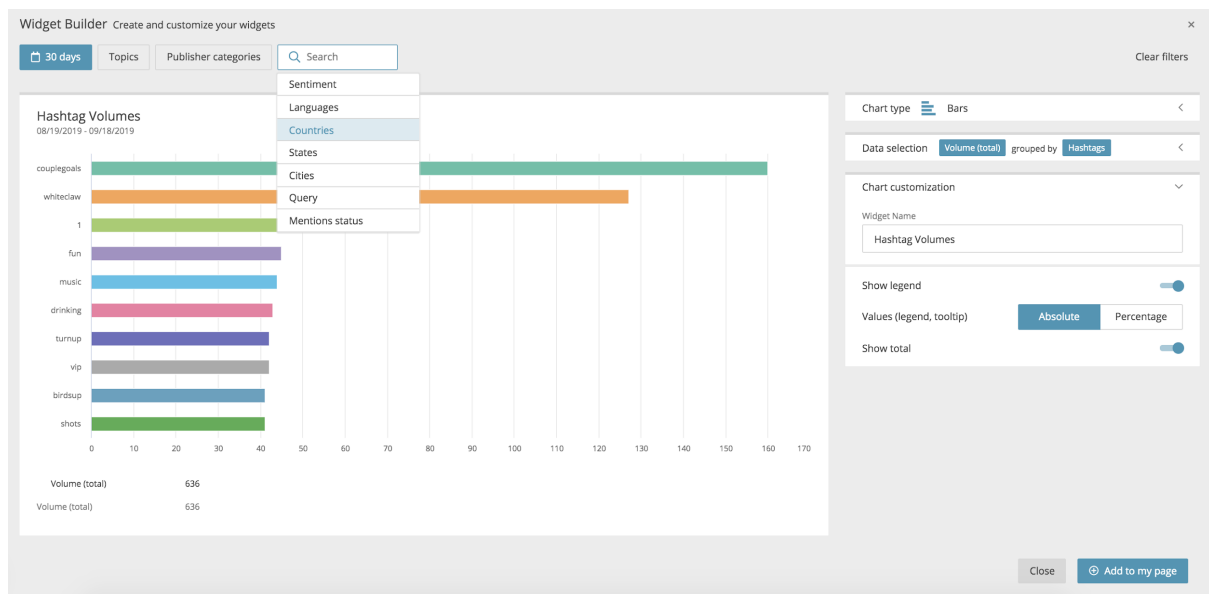
Step 2 - Define and select your data. To do this, select from the 'Display' and 'Grouped by' drop-downs under 'Data selection'. In this example, we are looking at the volume of mentions, grouped by hashtag:



Step 3 - Name and then add your new widget. To do this, click 'Chart customization'. You can then change the name of your widget.



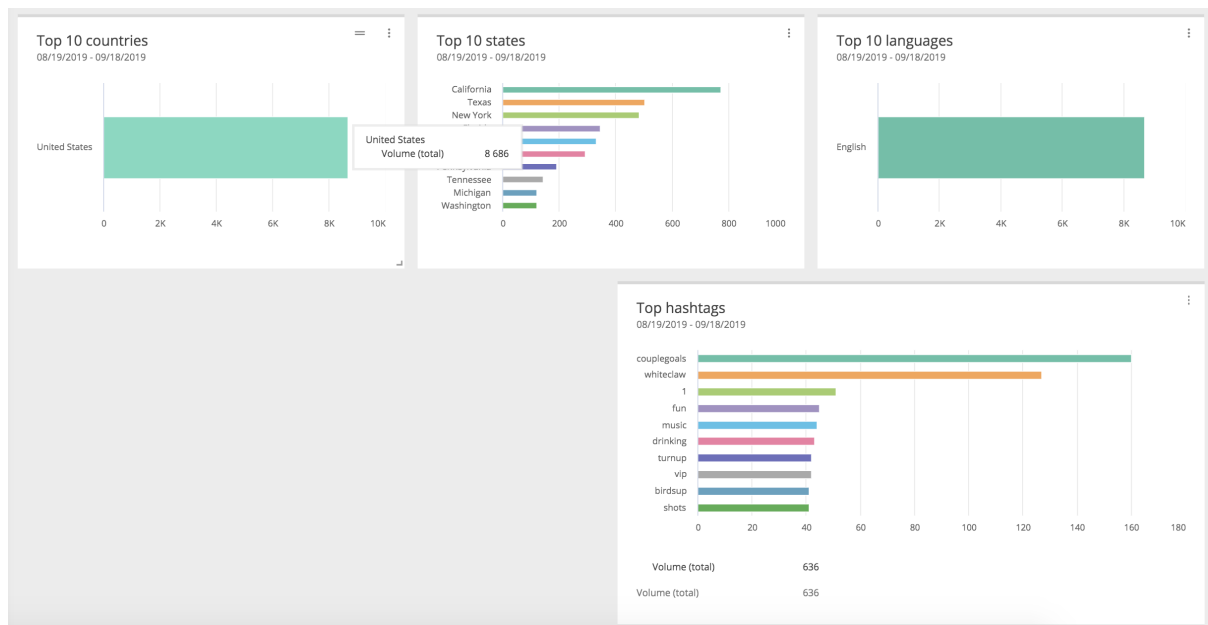
Step 4 - Configure the filters you would like to apply to your widget. These widgets are persistent and will be saved across any number of sessions in your dashboard.



That means that once you set the filters you would like applied to your widget, they will not change permanently unless you go into the widget editor and change them.

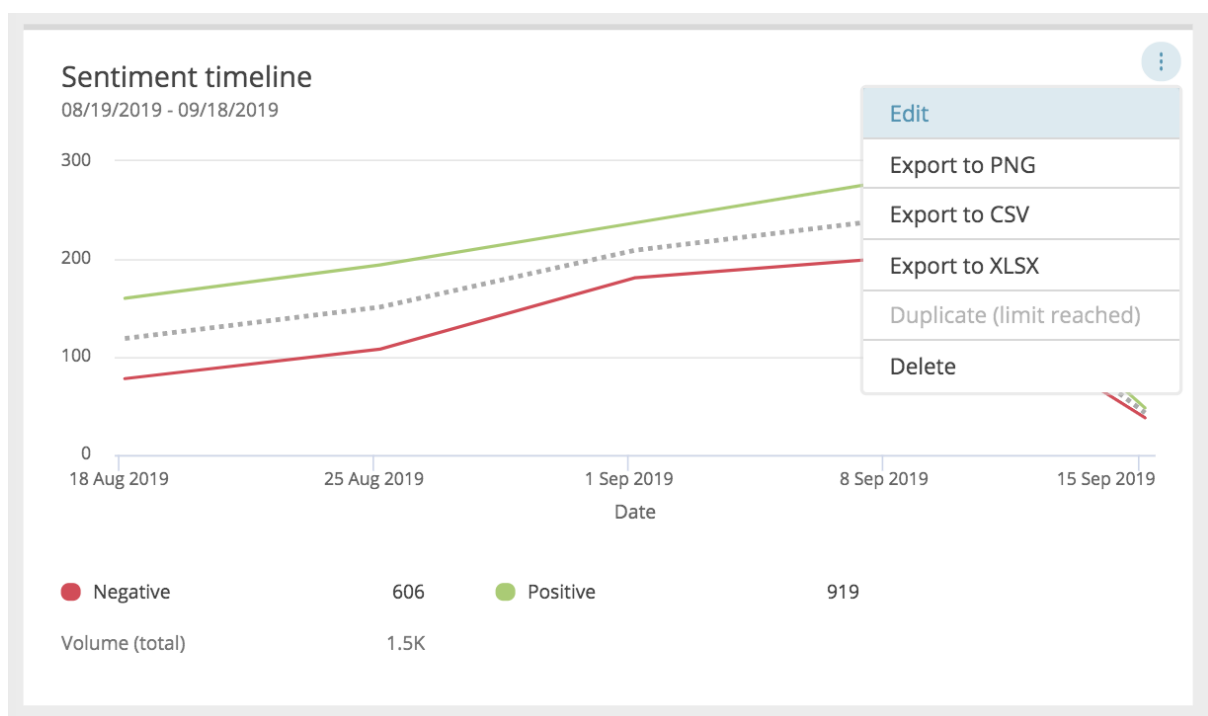
You've built your widget! Go ahead and click the 'Add to my page' option to publish the widget to your page.

Navigate back to your Page to find the new widget. Below is a screenshot of the widget we created.

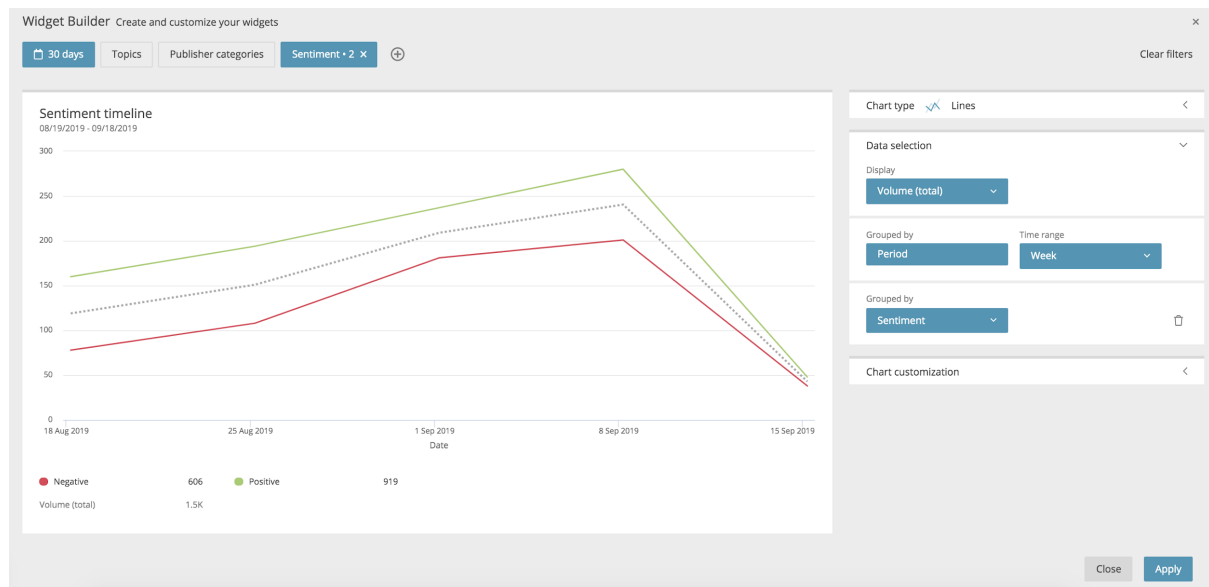


Editing existing widgets

Step 1 - To edit an existing widget, click the menu option on the widget you would like to edit, i.e., the three dots stacked atop one another. Select 'Edit.'



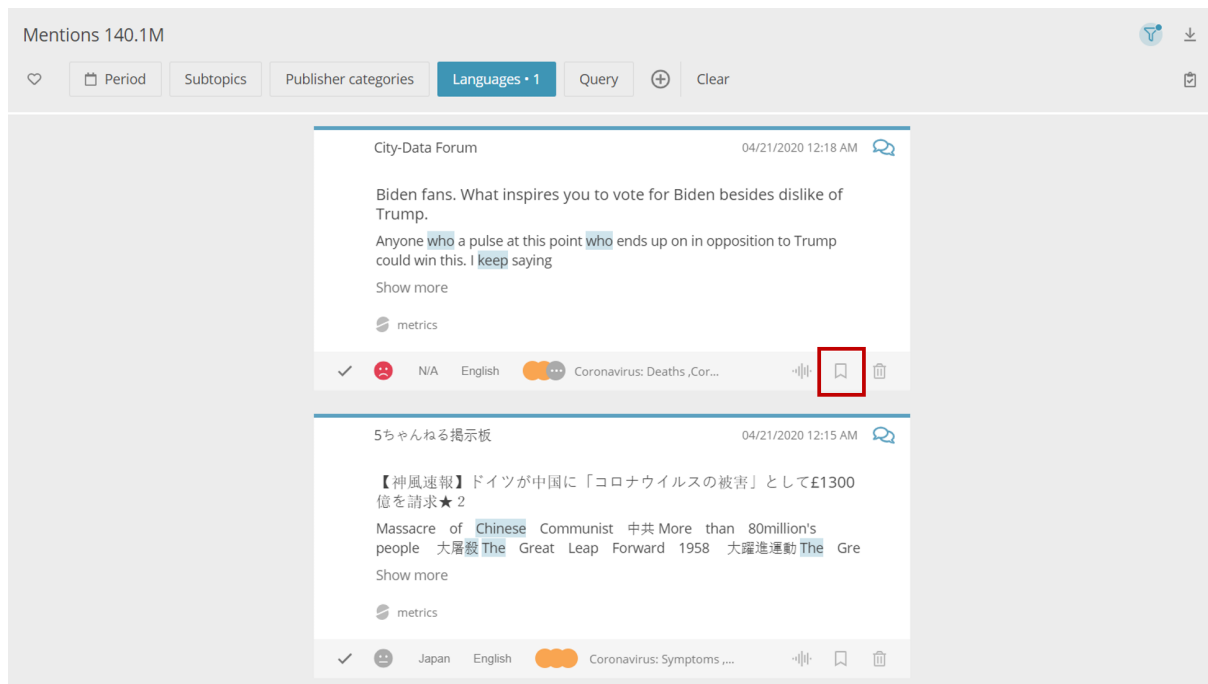
Step 2 - Edit away and then apply. Below is a screenshot of the editing experience. The widget editor allows you to change the filters, chart type, data selection, name, and legend of your widget. Once you select 'Apply', the changes will be reflected on your Page.



Data Point Widget Feature

Data Point Widget Feature provides you with the full story behind each straightforward trend detection and comprehensive key drivers identification to elaborate actionable insights for their business. This is great because (1) you save time and (2) you gain a better understanding of what you are analyzing. You can do this by either launching a Listen Tab Report or an Instant Signals Report right within the Widget.

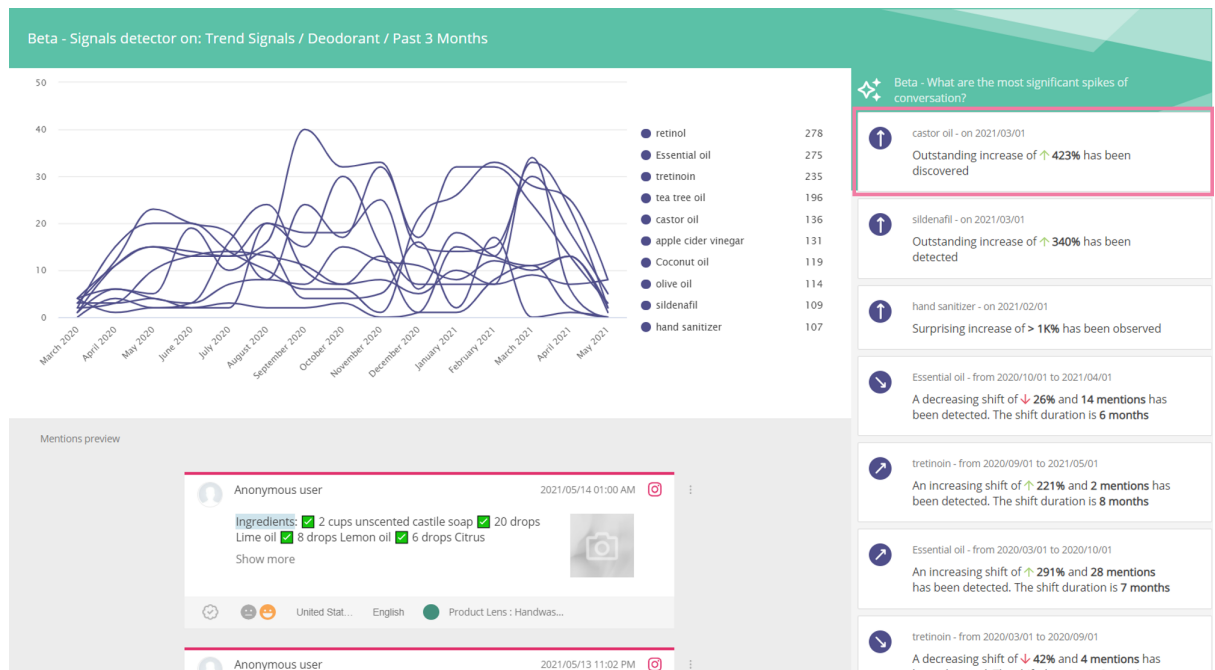
In order to view a data point widget to open a [Listen Tab](#) to view the raw mentions that are getting captured by your dashboard:



1. Click a data point on one of the widgets in one of your reports via the 'Reports' tab.
2. In the Listen Tab, review your mentions in chronological order. The following sorting capabilities are available too:
 - Interactions
 - Views
 - Potential impressions
 - Engagement rate
 - Retweets
 - Volume of Mentions to review peaks in mentions

In order to view an [Instant Signals](#) to discover & surface all statistically significant event trends or patterns with deep semantic analysis of the conversations within these trends or patterns:

1. Click on 'Signals' in the Upper Right corner of any widget on your 'Reports' page & it will open up a full-fledged Instant Signals tab.



2. When clicking on this icon, you have an statistical overview of all the signals that have been detected (ie. shifts in the volume of mentions, Mentions stream, and high-level insights of interactions, peak). You'll have the ability to see the semantic drivers behind a shift, the strength of the signal, & other aspects mentioned in the [Instant Signals](#) article.

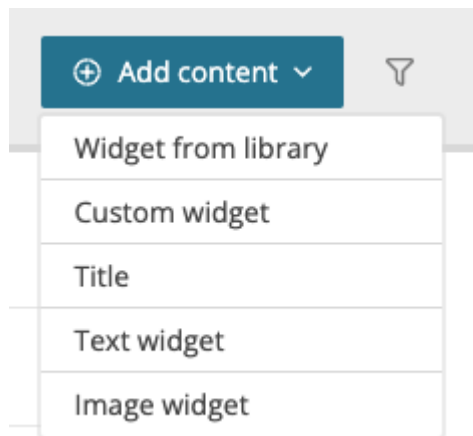
3. Transform this signal into a text widget & view a data point as a "pin a mention."

Image Widget

Customize your Reports pages with your own images such as brand logos, product illustrations, graphics from internal tools, etc. for different use cases. Image widgets can be moved around and resized as any other widget.

Here's how you find Image Widget:

1. Go to 'Reports' tab
2. Click on 'Add content' in the upper right corner & click on 'Image Widget'
3. Upload your file & move to anywhere on the Reports page



This widget is perfect for personalizing reports in several ways:

Let's say you're an agency or consumer insights analyst delivering a project for your client(s).

It helps to personalize and formalize your reports for those clients to pass to multiple team members and keep track of your analytical insights you provide them every week, month, or year.

A different scenario could be that you're working on a product & doing research on improvements within the platform.

You can easily upload client conversations, pictures within the platform, etc. to keep your narrative easy to read & follow so your client, your boss, or anyone that reads the report knows what you're referencing as your topic of conversation.

Page customization features

Synthesio allows a user to alter one's Page Layout. There are five actions you can take:

1. Drag, drop and resize - Allows you to rearrange the placement of widgets across your dashboard/page. You can resize your widgets.

2. Filter - You can filter the Page by various attributes: Time Period, Publisher, Topics, and more.

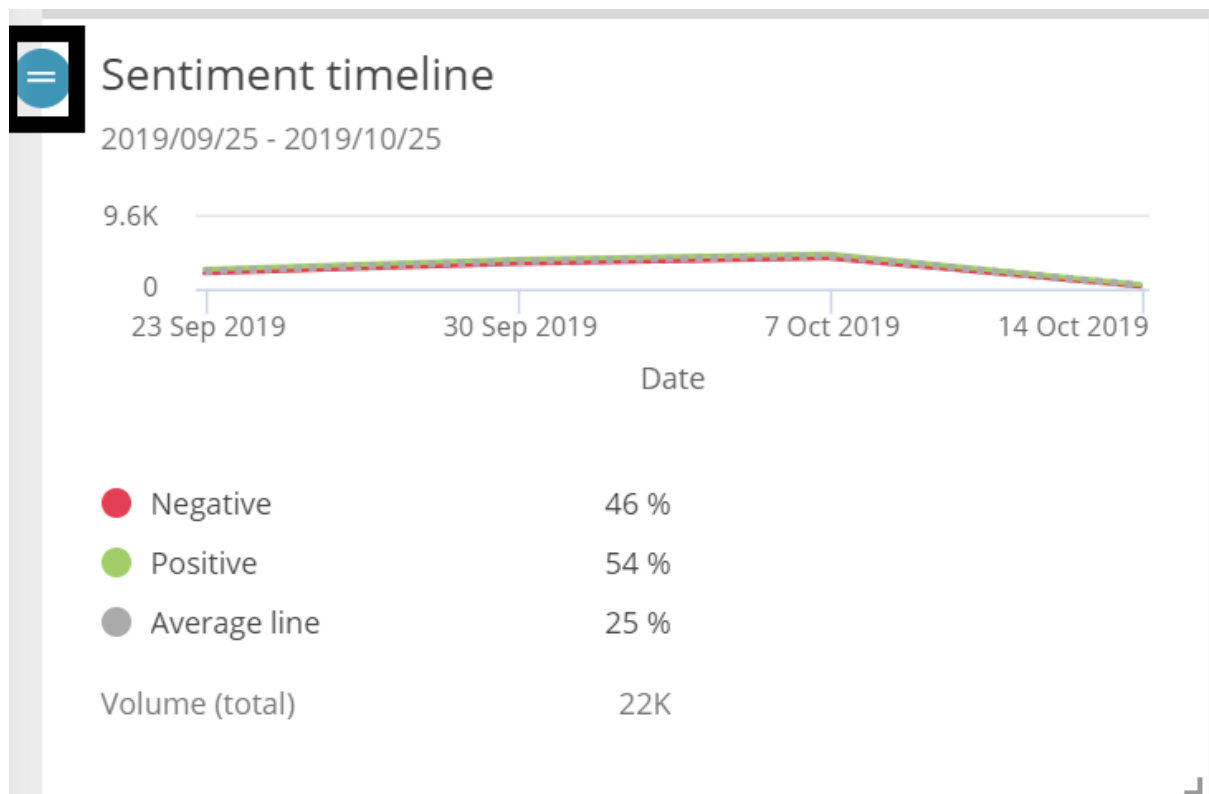
3. Delete - You can export and delete individual widgets and entire Pages.

4. Duplicate a page - You can copy and duplicate an existing page, rather than starting from scratch.

5. Separator widgets - A separator widget cuts across the page, allowing you to group widgets with similar attributes. See the screenshots below to get a better understanding.

Drag, Drop and Resize

You can Drag and Drop individual widgets across your Page. This is simple to do. Hover your mouse over the two lines, as highlighted in the below screenshot. You will then have the option to grab, drag and drop the widget across your Page. To resize, simply place your mouse on the bottom right corner of the widget you would like to resize.



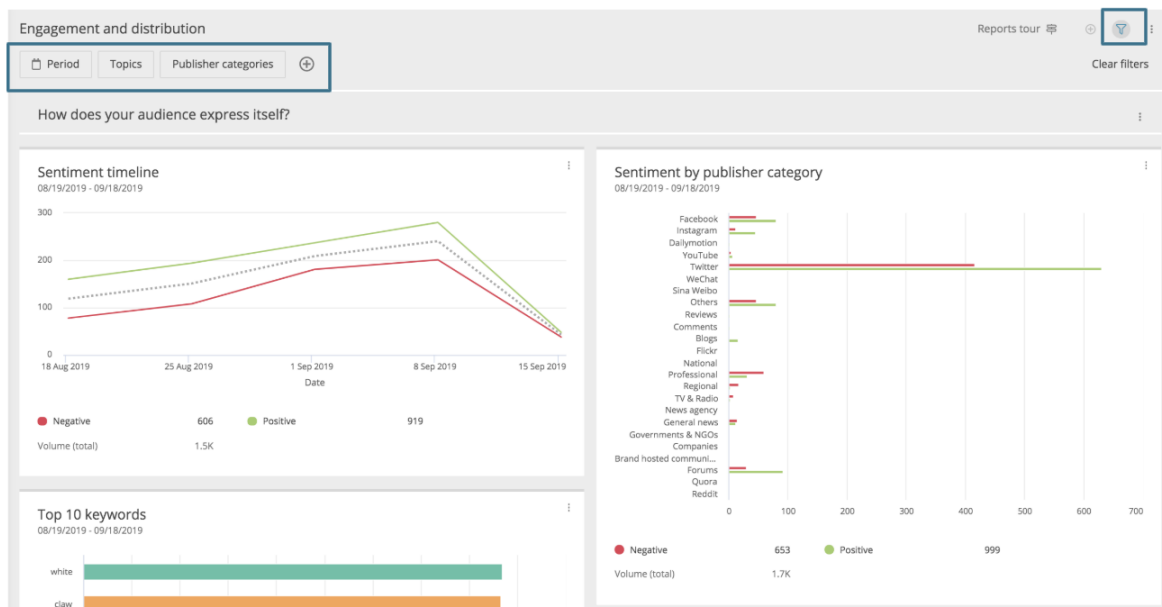
Filtering

The Filter option allows you to apply filters across an entire page.

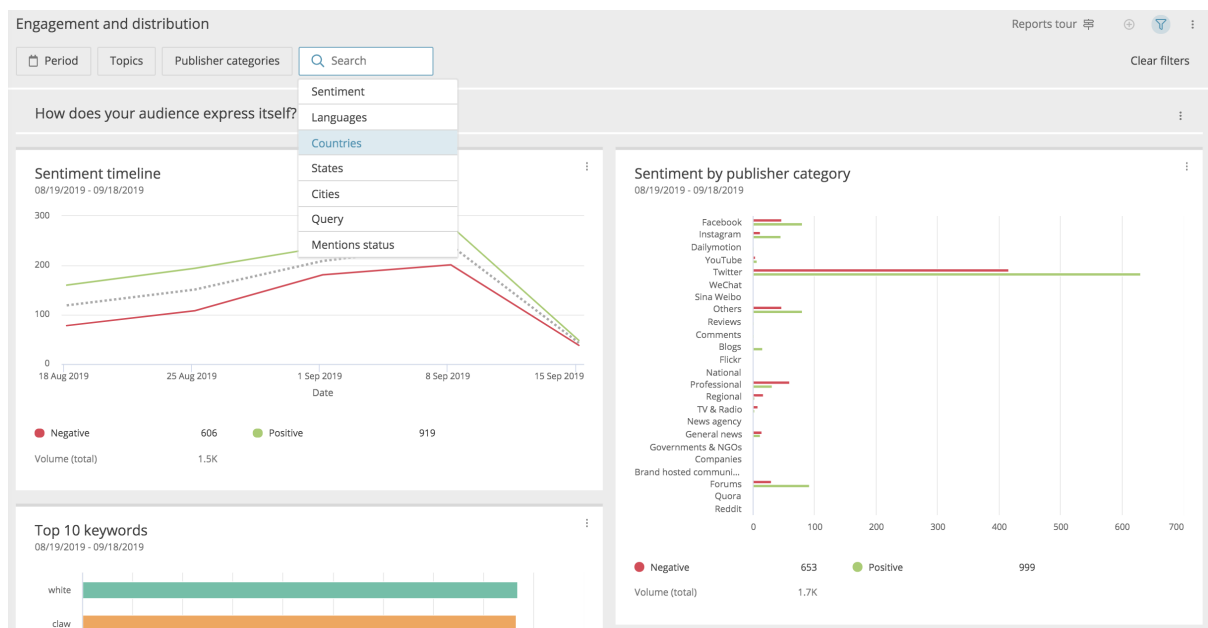
Page filters are temporary, so they will not be saved beyond your current session in your dashboard. They will, however, override widget filters during your current web session, which are configured during the creation of each widget.

That means that the filters you chose during widget creation will remain the same in your next session even if you've applied page filters that have changed them temporarily in your current session.

Start by clicking the 'Filter' icon, which is at the top right of the page. Once you select, you will notice the ability to filter by Time Period, Topic and Publisher.



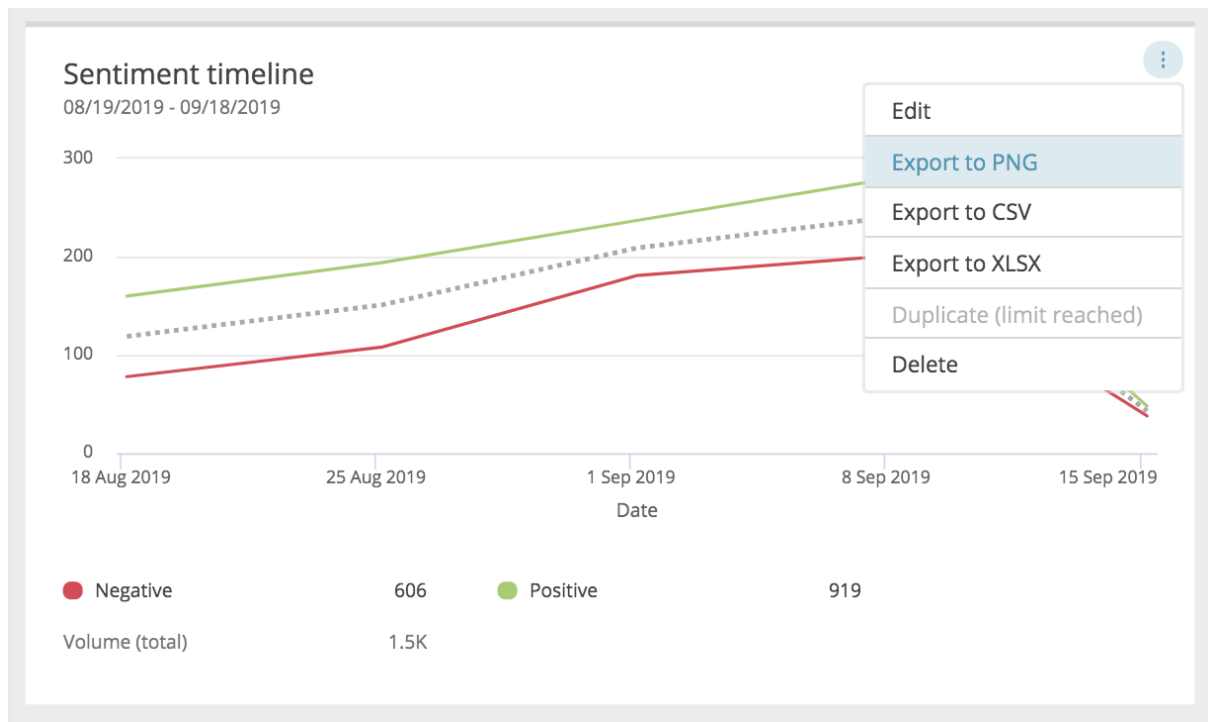
You will also notice the plus icon. By selecting that option, you will find additional filters.



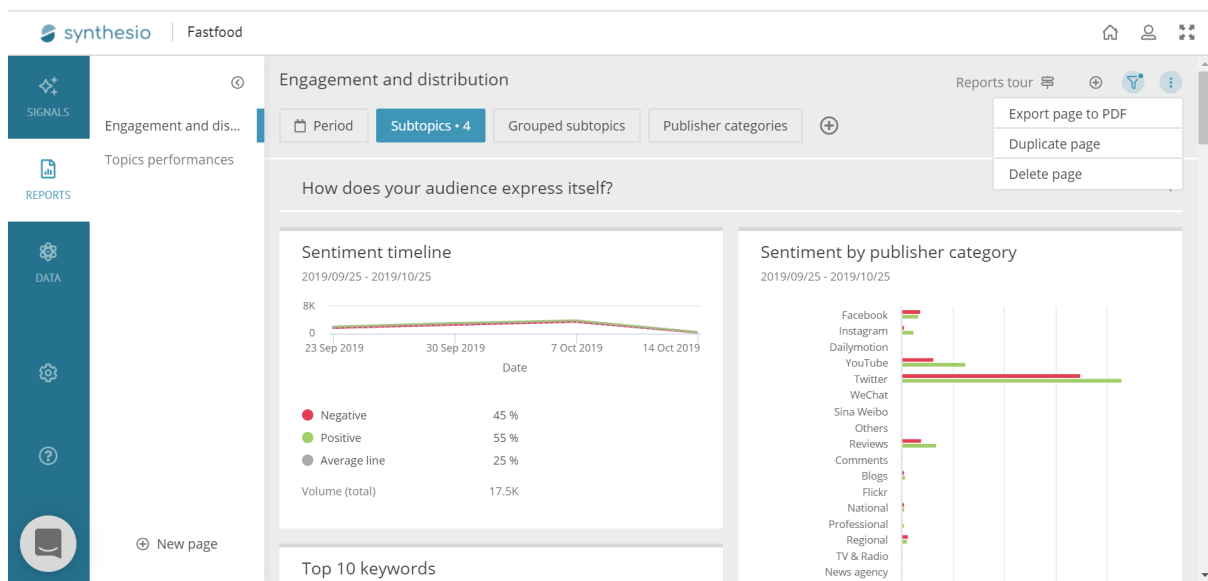
Delete and Export

Lastly, you have the option to delete and export, both on the individual widget level and page level.

Widget level: You have the ability to Edit, Delete and Export to multiple file-types.



Page level: You can 'Export page to PDF', 'Duplicate page' or 'Delete page'.



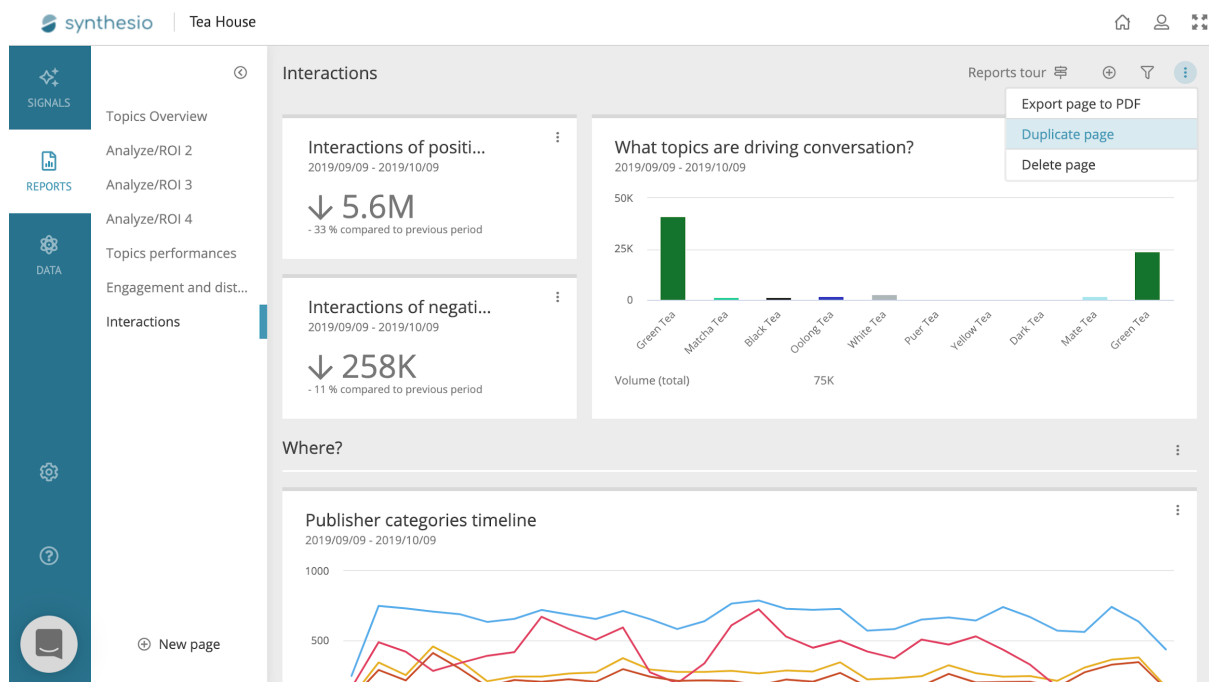
Tip:

Explore your data in many ways to view your data exactly how you want, without being constrained by widgets or pre-built metrics. When exporting your reports in CSV/XLSX, you have access to all **Reveal features & timestamps of data**, such as a dedicated "Export details" tab on single widget exports in your file. Some formatting changes are expected as your selection of dimensions and metrics are in columns and results in lines. Easily cross a section of your exported dimensions, metrics, and results via a **pivot table** & don't lose track

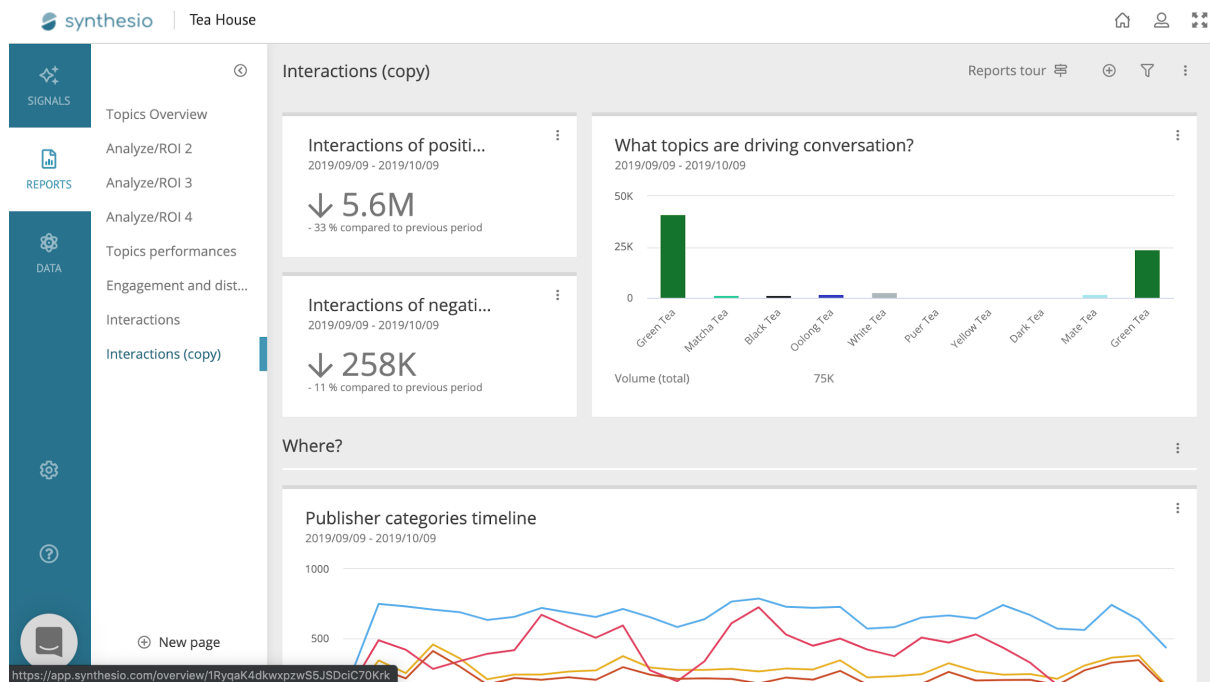
of your changes in datasets. Simply put 'Sentiment' in columns, 'Period' in rows, & 'Volume' in Values within your pivot table for previous export experience.

Duplicate a page

You can copy and duplicate an existing page, rather than starting from scratch. This allows you to move quickly and re-use the widgets that resonate most with you and your team. Simply select the menu option (the three vertical dots, aka the hamburger) and click 'Duplicate Page'.



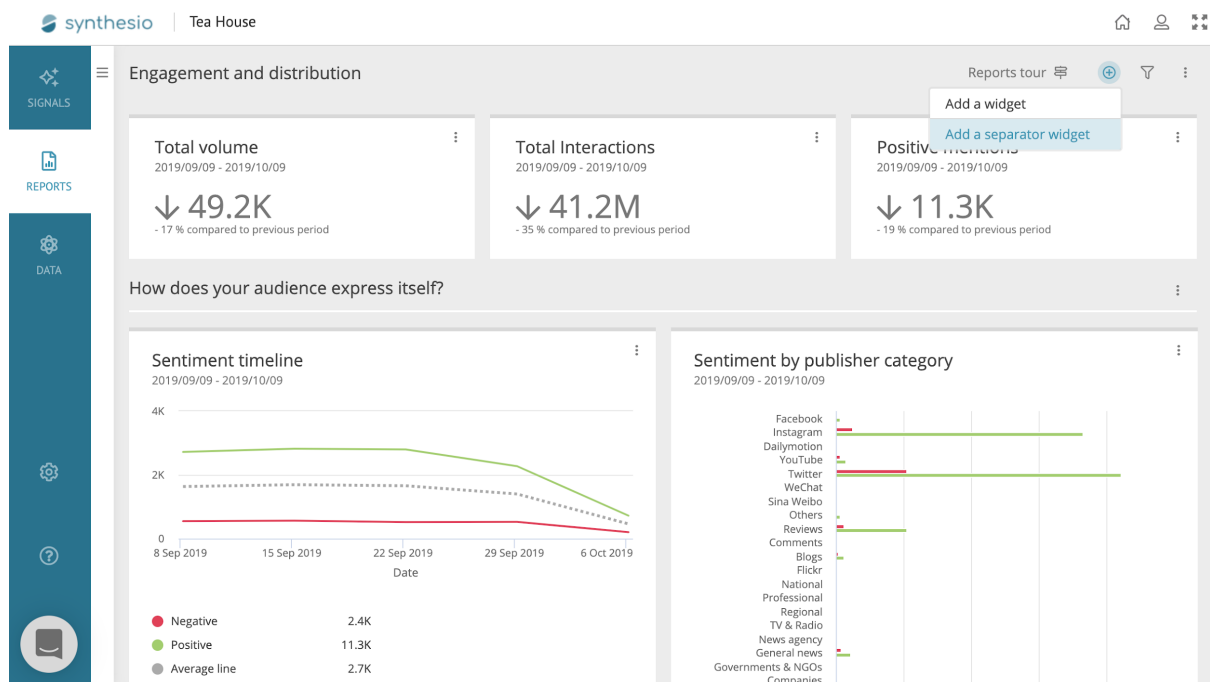
You'll notice the duplicated page, which is titled 'Interactions (copy)'.



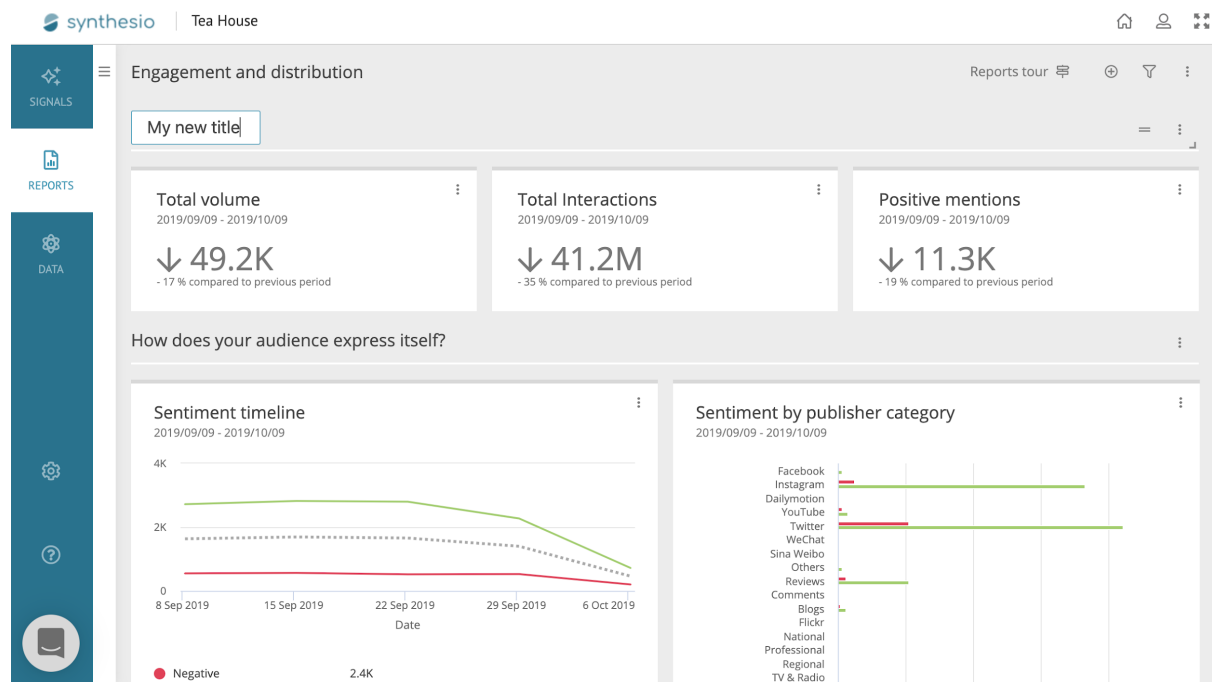
Separator Widgets

With separator widgets, you can better structure and organize your page layout. It's a simple yet important concept. A separator widget cuts across the page, allowing you to group widgets with similar attributes. See the screenshot below to get the gist:

First, click on the plus sign and select separator widget.



Now name it.



Stay tuned to our Help Center for updates and best practices!