Survey&Report

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ISO 27001

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Certifiering av
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Table of content

Dashboard and 2-factor authentication

New layout

In this version, we have given the application a modern look with new colours, icons and buttons.
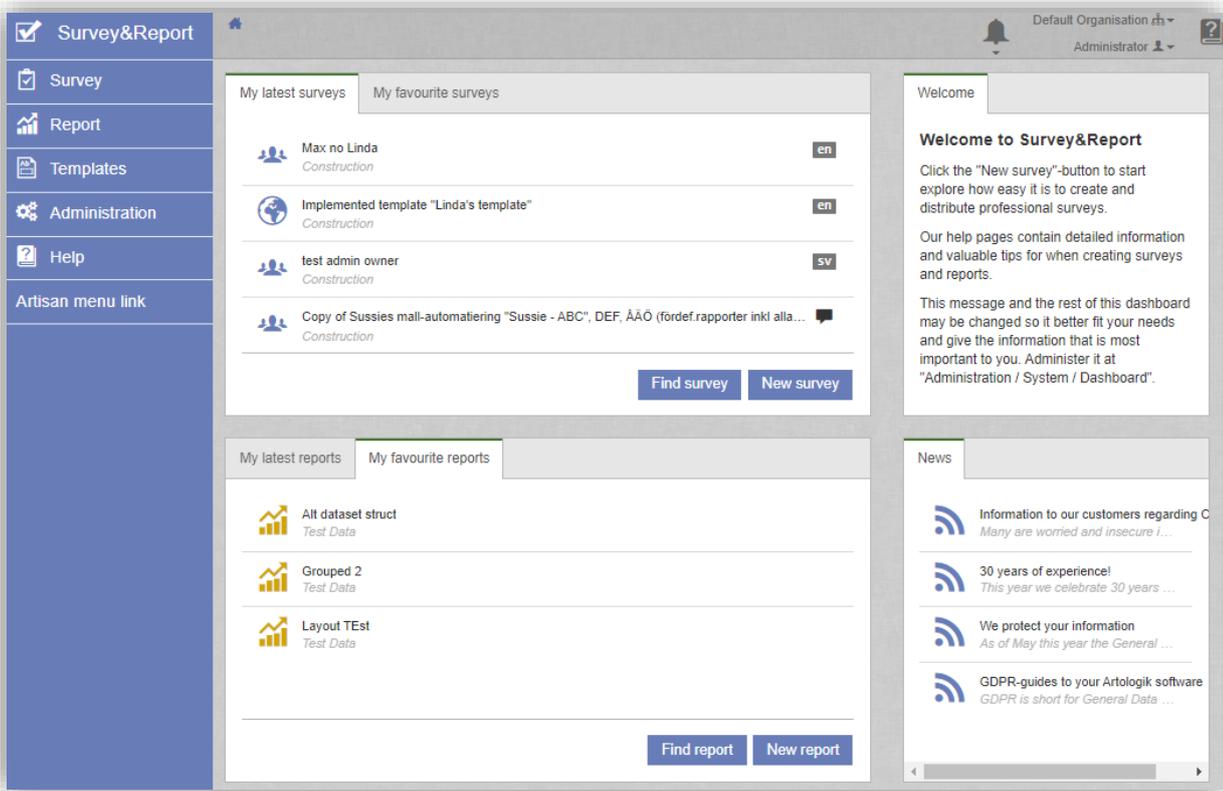
Each user can define which layout to use. You might want to hide the menu and use the whole screen if you are working in a lap-top, or use a narrow layout if you are working on a big screen.

In *My profile*, found on the top right under the own user name, each user can now also decide:

- Menu:
  - Position: Left or Top
  - Accordion menu: On = the previous menu section is collapsed when a new section is selected

- Working area:
  - Aligned left (fixed width)
  - Centered (fixed width)
  - Aligned right (fixed width)
  - Full width
  - Maximized width (menu is hidden)
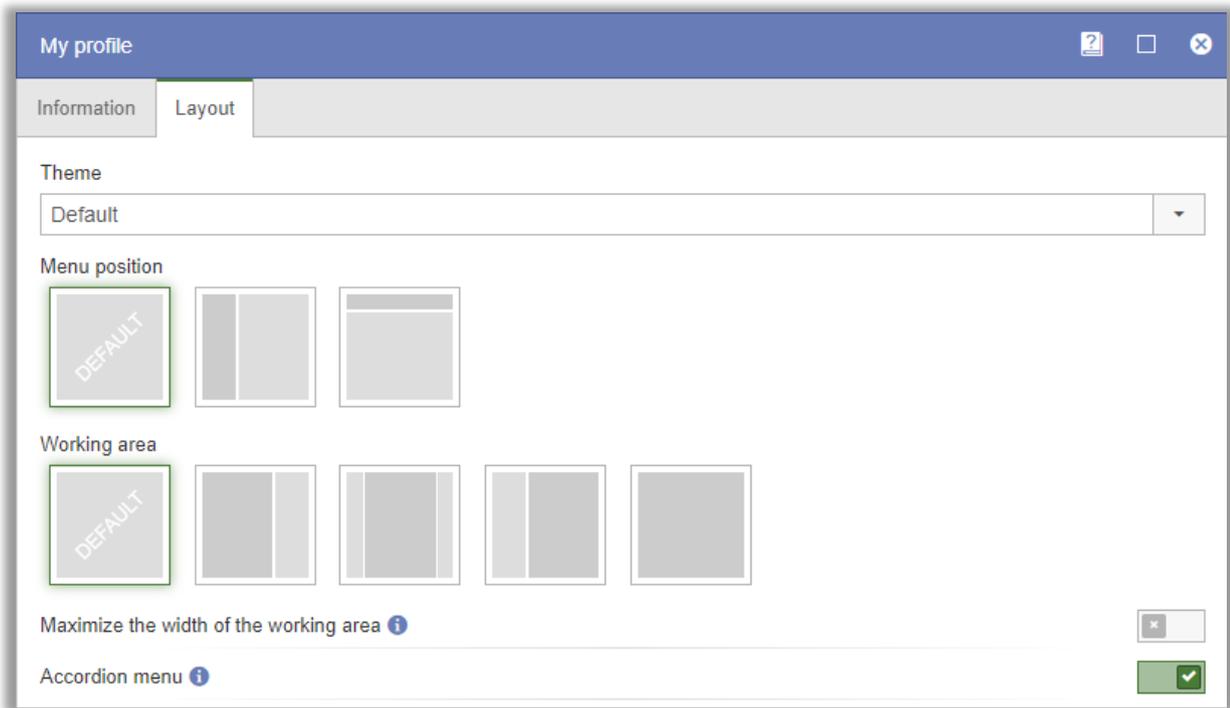
Under *Administration > System > Settings*, system administrators can specify a default setting for menu position and working area which will be applied for new users.

Dashboard

You can now decide the content on the page, which is displayed directly after a user logs in - the main dashboard.

As default, the dashboard will contain five "boxes" with following content:

- My latest surveys/My favourite surveys
- My latest reports/My favourite reports
- Statistics - chart/Statistics - in numbers
- News from Artologik
- Text element

Text elements can, for example, be used to give users instructions or information about who to contact regarding the system. In addition, you can also add videos and RSS feeds.

You edit the dashboard under *Administration > Dashboard*.

Favourite questions, surveys and reports

One of the things you can choose to show on the main dashboard is *My favourite surveys* and *My favourite reports*. Under these tabs, each user can get quick access to the surveys and reports he/she has marked as favourites. On the survey

dashboard and report dashboard, respectively, the user can click the [★] icon to mark the survey or report as a favourite.

The icon is then highlighted, [★]. Click the icon again to remove the survey or report from your favourites.

Questions can also be marked as favourites. In the *Import question* dialogue, which you access from the *Construction > Content* page, you have three tabs. The questions you mark as favourites under the *From survey* and *From templates* tabs will be available under the tab *From favourites*.

Two-factor authentication at login

By enabling two-factor authentication, you increase the access security. It makes sure that your identity is verified in two different ways at login: first with the Survey&Report username and password and then with a TOTP (Timebased One-Time Password) application.

Each user enables two-factor authentication in the *My profile* window. As a system administrator, you can go to *Administration > System > Settings* and decide whether two-factor authentication shall be:

- *Not enforced* (users can enable two-factor authentication if they want to)
- *Not enforced but encouraged* (users are recommended to enable two-factor authentication, each time they log in)
- *Enforced* (users must enable two-factor authentication to be able to log in)

In order to be able to use this functionality, you will need access to a TOTP app, for example on your smart phone. (TOTP apps are for example provided by Apple Store and Google Play Store.)

After enabling two-factor authentication, you must add and set up an authenticator. The authenticator is the connection between your user profile and the TOTP app.

The next time you log-in, you will be asked to enter a code generated from your TOTP App after you enter your username and password.

Survey dashboard

Changelog on surveys

The new survey dashboard contains the tab Changelog, in the top right corner. Here you can see what notable changes have been made to the survey as well as the time, the date and the user who carried the activity out. Activities may include Survey created, Added question, Finished construction, Survey closed etc.
Thus, you always have an overview of all important changes.

Survey construction

SR-Evaluate is no longer a plug-in, but a part of the program!

The SR-Evaluate functionality has been removed. In Survey&Report 5 we have added other ways of enabling easy survey creation: survey creation wizard, merged questions, header/footer and introduction text under content and more.

Wizard for creating surveys

You now have support of a wizard, when creating a new survey. When you click *New survey*, you decide, in the wizard's first step, whether you want to create a *New blank survey*, *Copy existing survey* or create a *New survey from template*. Which options that shall available for a user depends on his/her user group rights, separate rights are available for the three options. Thus, via the user group rights you can, for example, decide that users only shall be able to create surveys from templates.

If you select one of the options *Copy existing survey* or *New survey from template*, you decide, in the wizard's next step, which survey to copy or which template to base your survey on.

In the wizard's last step, you give the survey a name, decide if it shall be multilingual, and select the survey type: *Anonymous, Respondent* or *Public*. Depending on which type you choose, you can also make some basic settings related to that survey type.

After clicking *Finish*, you go directly to the *Content* page where you can start constructing the survey content.

New interface for editing all survey content

You can now edit all survey content, including questions, introduction text and header/footer, from the same page - *Surveys >
Construction > Content*. Click the ✎ icon to open an editor for the introduction text, header and footer. You can also use the
same icon next to each question to get access to all editing possibilities for the question, but the most common settings can be
changed directly on the page, as well as the question texts, see below.

Inline editing of question texts

Edit question titles, sub-question titles and answer options directly on the page using inline-editing on the *Survey >
Construction > Content page*. Just click the text you wish to edit and a small editor will open where you enter the text. When
you leave the field, the change is automatically saved.
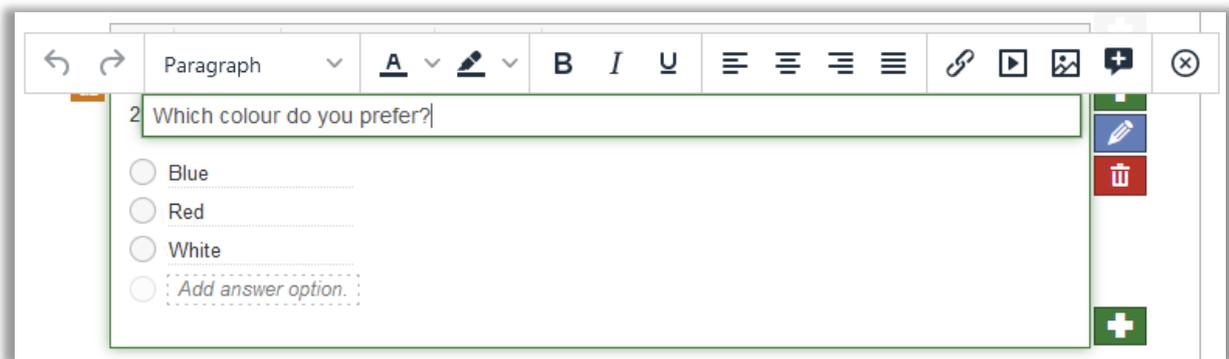
Quicker access to common settings

When you click somewhere else in the question's box (not on a text), a toolbar opens containing e.g. icons, with which you can
activate some common question settings:

☑ Make the question mandatory

⊘ Make the question hidden from the start

🔲 Activate a comment field

▦ Show *design elements* where you can add info text, images, videos and more
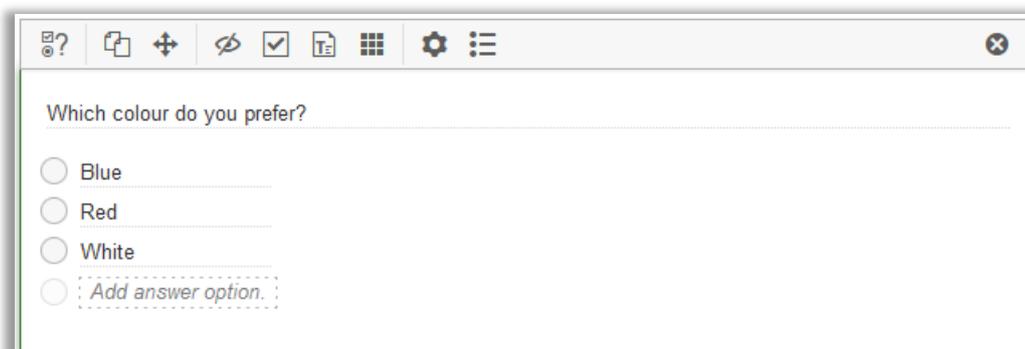
Piping

It is now possible to insert the answer from a previous question into a subsequent question's title, subquestion title or answer options - so called *Piping*.

Question 1 (administration)   *Question 2 (administration)*

Question 1 (survey)   *Question 2 (survey)*

In order to be able to use piping, the "source question" and the "target question" must be located on different survey pages, with the "source question" on a previous page and the "target question" on a subsequent page.

We recommend that the "source question" is made mandatory, to make sure that there is an answer to insert in the "target question".

Question types that may be used as "source question":

- Single-Choice
  – Yes/No
  – Radio Buttons
  – Drop Down List
  – Rating
  – Image Map

- Text
  – Memo
  – Field

- Numeric
  – Field
  – Slider

- Calendar
  – Date Time

In the "target question", you insert a "tag" with the ID of the "source question", for example $Q1$.

This tag, you can write manually, but you can also insert it using the ➕ icon in the toolbar when editing the question. This icon is available both in the inline editing mode and in the advanced editing mode. When you click the icon, only questions that are possible to use as "source question" are available for selection.

Settings on survey level for authorised users' right to view/submit answers

Survey owners can now decide if they wish to authorise authorized users to view received answers and submit new for their own survey. This gives more autonomy to survey owners. This can prove useful if the survey to be conducted has a large number of respondents and you need help with conducting it by phone call or analysing the answers and exporting them to PDF for one survey, while you might not wish to activate this possibility for authorized users on another.

To do activate the functionality, go to *Survey > Construction > Settings > Access > Authorised users*, to give selected users access to your survey. Once other users have been authorised, you can decide what will they be able to do in the *Show answers* menu by enabling or disabling *Authorised users may submit new answers* and *Authorised users may see answers*, found right below *Authorised users*:

- *Authorised users may submit new answers*: If this setting is enabled, users that you have added as authorised users are allowed to submit new answers to your survey.

- *Authorised users may see answers*: By enabling this setting, you allow your authorised users to see the answers for this survey.

Please note that the settings are only visible to the owner of the survey.

Survey overview

The new *Survey overview* page gives you the possibility to print or export the survey questions. This can be useful if you want to distribute the survey, on paper or as a file, to ask for e.g. your colleagues' opinion before finishing the survey construction.

If the survey contains logics, the condition and action of each logic will be displayed above the questions involved.
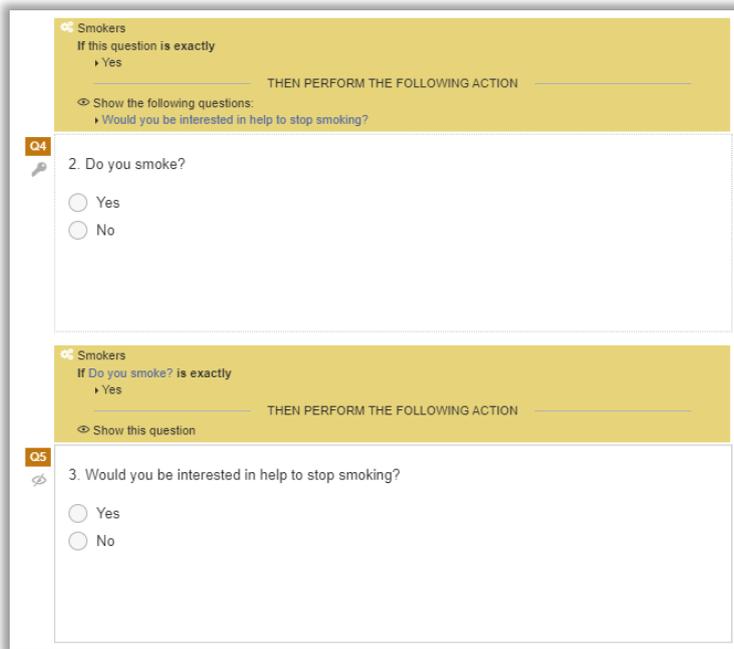
You reach this page via the *Survey overview* button in the *Survey > Construction > Content* page.

Possible to change survey owner

It is now possible to change survey owner. This can be useful if you want a new user to be responsible for surveys whose owner is no longer working in your organisation.

Possible to reopen construction

After you have finished the survey construction, most parts of the survey are locked for editing. You can, for example, not add or remove questions and answer options, and neither change a question's question type. If you, after the construction is finished, discover that you need to make such changes on the survey, you can now reopen the construction to make the survey editable again.

You find the *Reopen construction* button on the top of the page in the *Distribution > Settings* menu, and also among the shortcuts under *Actions* on the survey dashboard page.

It is possible to reopen the construction even on surveys where answers have been submitted. In this case all answers will be deleted. This can be useful if some answers have been submitted for test purposes, that you want to remove. As a security measure, you will have to confirm the reopening of the construction. If the survey has submitted answers, you must type the word "Delete" to confirm the deletion of all answers. Please note that any reports that have been created for the survey will always be deleted when the survey construction is reopened.

In the user group rights, you can decide which user groups should have the right to reopen the survey construction.

Survey distribution

Publication date not mandatory at survey publication

In version 4, it was mandatory to specify both start date and end date when finishing the survey construction. You can now finish the construction without entering neither start nor end date, and instead decide this later on. For respondents to be able to answer the survey, a start date must of course be specified, but you can leave the end date blank if you want the survey to be published until further notice.

New functionality for user-specific respondent categories

We have improved the functionality of user-specific respondent categories (in version 4 called survey-specific respondent categories). These categories now have an *Owner*, which by default will be the user who created the category. It is also possible to connect authorised users to the category. The owner has the right to edit his/her own categories from the *Survey > Distribution > Settings* page.

When clicking the *Select respondent category* on this page, a window with three tabs will open:

- *Global categories* - categories which all users can use on their surveys. These categories can be created and edited by users who have access to the page *Administration > Respondents > Global respondent categories*.

- *My categories* - categories the logged in user is the owner of. The user can edit these categories from here, and also create new categories by clicking the *New category* button.

- *Assigned categories* - categories the user has access to, without being owner of them. This can be the case for these reasons:
    - The user is owner of, or connected as authorised user to, a survey to which the category is connected.
    - The user is connected to the category as authorised user.
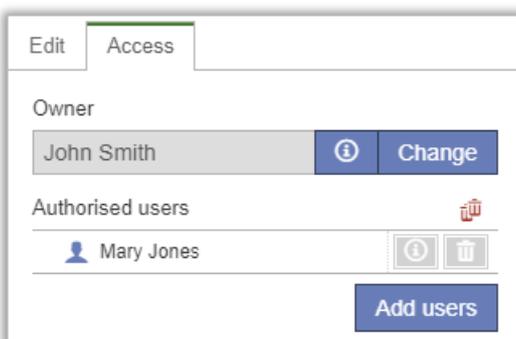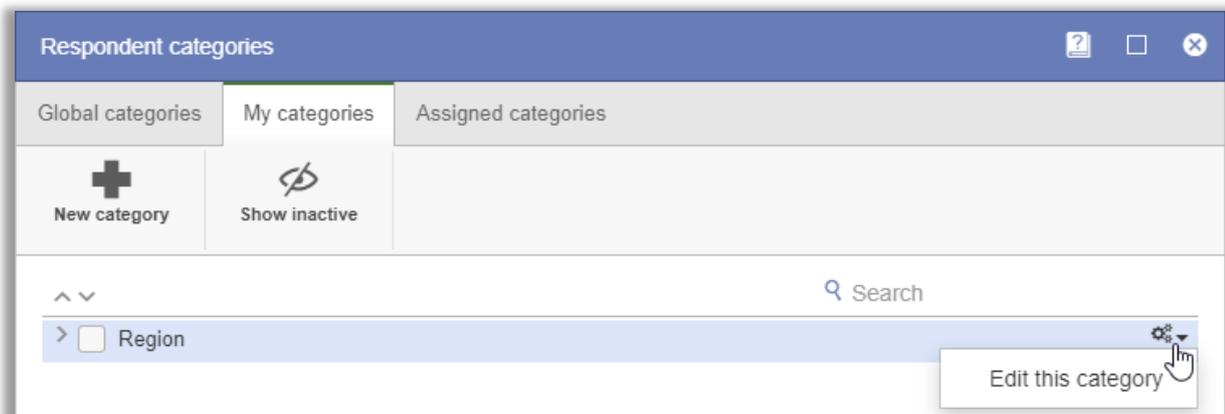
Columns displayed in the respondent list - saved on user level

In version 4, you specified on user group level which columns to display as default in the respondent list. This was made under *Administration > Respondents > Settings > Group-specific settings*.

In the new version, the choice a user makes by clicking the *Show/hide columns* button when working with a respondent list will be saved and the selected columns will be displayed as default the next time the user logs in, and until he/she makes another choice.
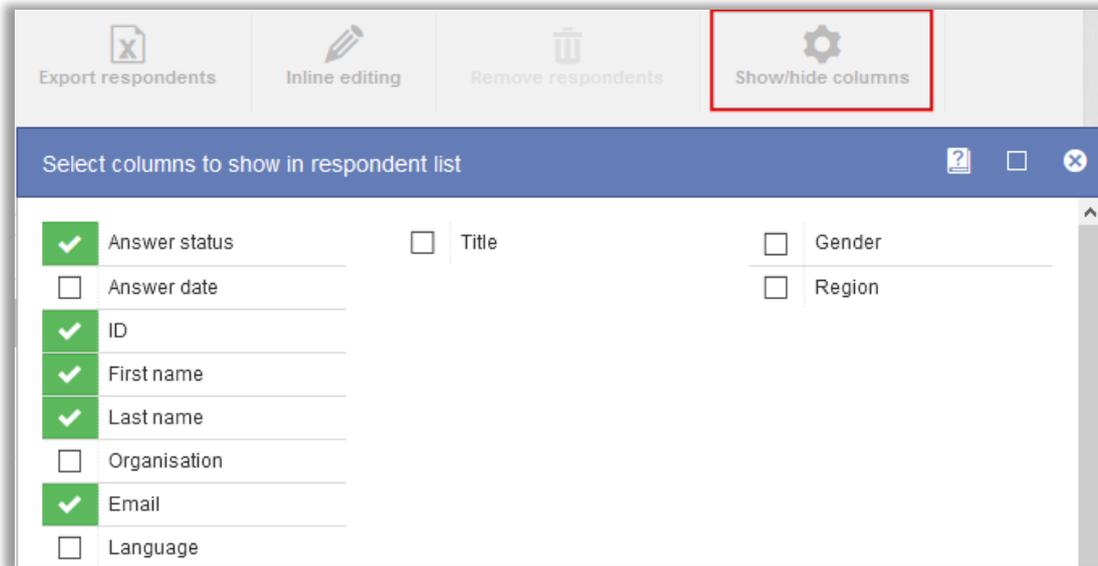
Let the respondent confirm the submitting of the survey

In the new version, it is now possible to show a confirmation message to the respondents after they have clicked on the button to submit the survey.

This function can be found in the tab *At completed survey* under *Survey > Distribution > Settings*. To activate it, click the

Enabled ☑ button for *Let the respondent confirm the submitting of the survey*. Underneath, you will find the

Confirmation message which you can create and edit by clicking the ✏ button.

Import of respondents – only in Excel format

You can connect respondents to your survey by importing them from a file. In version 5 only one file format is available: Excel file. For information on the requirements on the content and layout of the file, you can download a sample file.

Email inbox - possible to reply to and forward emails

If a respondent replies to an email that he/she has received from Survey&Report, the reply can be found under the *Email inbox* tab on the survey. When you open an email from this tab, it is now possible to forward or reply to the email by using the corresponding buttons.

All of the emails in the correspondence are listed under *Related emails* and you can click an email to read it.
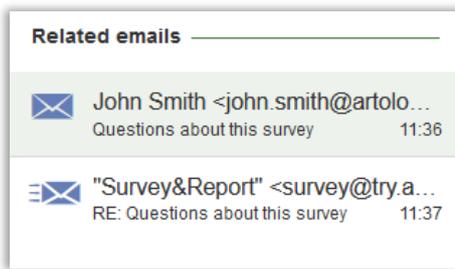
New menu: Other distribution

Besides sending respondents a link to your survey via email, you can now also use the following other ways of distribution: *Embedded, IFrame, Pop-up* and *QR code*. You find these options under the new menu *Distribution > Other distribution*.

- *Embedded:* Embed your first survey page with HTML code on your website. Anyone who responds to the survey will be redirected to Survey&Report after they have answered the questions on the first page.

- *Iframe*: Embed the survey as a frame or an external resource on your website. You have the possibility to adapt the IFrame *Width* and *Height* in the corresponding fields.

- *Pop-up*: A pop-up window appears when the web page loads, asking if the visitor wants to take a survey. You can decide the text of the message as well as the text for the buttons used to accept or reject to participate. You can also specify the probability of the pop-up message being shown. The probability will be 100 % by default.

- *QR code*: A QR code is generated, which the respondents can scan with their smart phones in order to answer the survey. You can distribute it via print media, websites or other digital media. You can adapt the size of the shown QR code.

Survey - Answers

New menu: Show answers - show and export answers to PDF

It is now possible to view individual survey answers and export them to PDF. Under *Answers > Show answers*, the individual answers are listed. Depending on the survey type, different information is displayed on each answer's row:

- Public surveys: Answer ID, and date and time for start and submission of the answer

- Non-anonymous respondent surveys: Answer ID, respondent name, and date and time for start and submission of the answer

- Anonymous respondent surveys: only the text *Anonymous respondent*

On each row, you can click [icon] to view the answer, or [icon] to export it to PDF. You can also export several answers at the same time by ticking their checkboxes (tick the checkbox in the heading row to select all) and click the *Export survey answers as PDF*. In this case, the export will result in a zip file with one PDF for each individual answer.

Reports

Wizard for creating reports

In this version, you create reports with the help of a wizard. Choose between creating a standard or an aggregated report (the latter with SR-advanced report).

For standard report you then choose which survey to base the report on. In the step *Basic information*, you can make a number of settings before finishing the report creation. You name the report and decide i.e. whether informational texts shall be included and select which questions to include in the report.

If you activate the setting *Select among survey questions*, an additional step in the wizard will appear where you select the questions to include.

Next to each question, you find the [icon] icon. By clicking this icon, you can select a specific report template, different from the template used for the report, to base the presentation of the question on.

For aggregated report, enter a name and select theme to create the report, then continue configuration via the menu.

New charts and new interface for chart editing

The charts have been exchanged. In the interface for editing charts, it is now possible to make individual settings for each series. You can, for example, choose to present two series with separate scales.
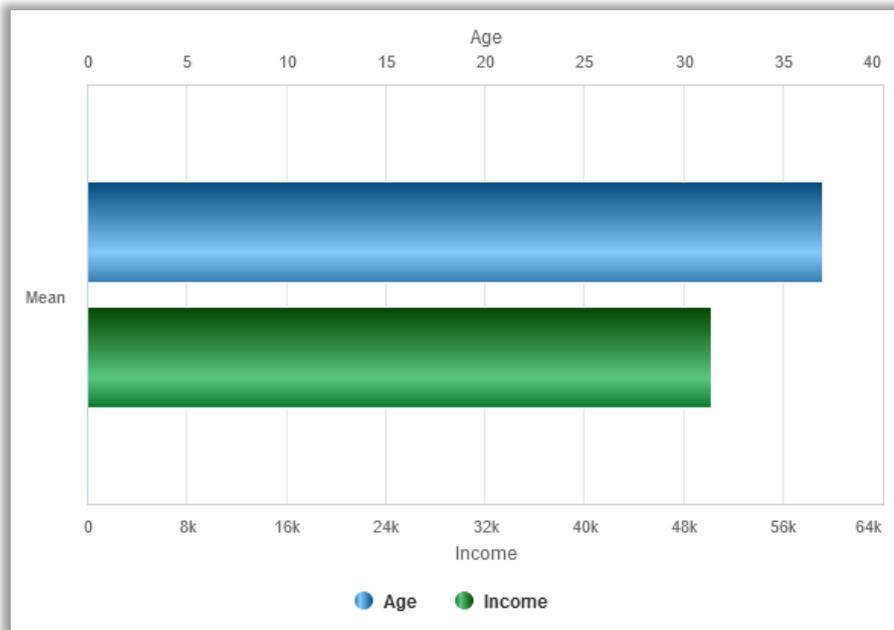
The interface is now divided into different tabs. Under *Settings*, you make default settings for the chart. There are also tabs for handling primary series (*Data*), background series (*Background*) and filter series (*Filter*).
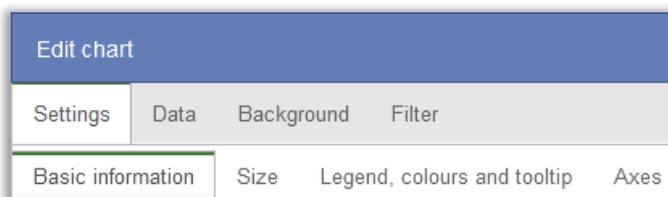
Under the tab *Data*, you can edit the chart's primary series by clicking the [icon] icon. For each series, you then have the tabs *Basic information* and *Axes*, respectively. Under these tabs, you can make customised settings for the series, or let the series use the settings defined under the *Settings* tab.
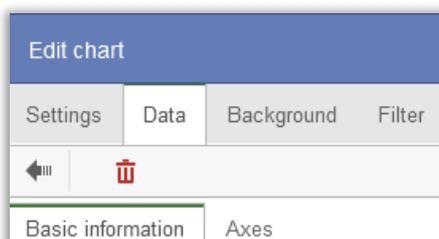
New settings for editing charts

A number of settings have been added in version 5:

- *Subtitle* (below the chart title)
- Data type: *Unprocessed* (new data type for presenting numeric questions grouped by individual answers instead of intervals)
- Data type: *Statistical* (not only *Mean*, but also *Standard deviation, Coefficient of variation, Minimum, Lower quartile, Median, Upper quartile* and *Maximum* can be presented), *Word count*
- *Exclude "I don't know" options* (Applies to answer options defined as *I don't know* options in the survey construction. If you activate this setting, you do not have to deselect the *I don't know* label on the series. The setting is available in charts and tables with the data type *Statistical*.)
- Exclude answer options with the value 0 (Applies to answer options given the value 0 in the survey construction, irrespective of if the option is defined as an *I don't know* option, or not. If you activate this setting, you do not have to deselect the answer option on the series. The setting is available in charts and tables with the data type *Statistical*.)
- New chart types: *Stacked line, Stacked line 100%, Line with markers, Stacked line with markers, Stacked line with markers 100%, Inverted line, Radar with markers, Radar with area, Radar with columns, Radar with markers (circular), Radar with area (circular), Radar with columns (circular), Radar with columns (inverted)* and *Box Plot, Word cloud*.
- *Animate chart* (animated effect when the chart is loaded)
- *Spacing* (create space to the left, to the right, above and below the chart)
- Settings for the *Legend*: Orientation (*Vertical* or *Horizontal*), Horizontal position (*Left, Center* or *Right*), Vertical position (*Top, Middle* or *Bottom*), *Overlap, Horizontal offset* and *Vertical offset*
- *Shared tooltip for each series* (in charts with more than one series)
- Category axes and Value axes: *Opposite side* and *Reversed direction*. These two settings replace the setting *Reverse axis* in version 4.

The following settings in version 4 are no longer relevant, since version 5 renders charts in a different way than version 4:

- Allow automatic layout improvements
- Font size: Adjust automatically
- Labels: Truncate
- Show empty labels in the legend

Word cloud

Under *Report > Content > Edit chart* you now have the option to choose a new chart type: *Word cloud*. This replaces the old feature *Text analysis*. With *Word cloud* you can present your respondents' most used answers in a chart. These words have different sizes, according to how often they have been used. When choosing the data type *Word count*, you will find settings where you can e.g. exclude certain words from the chart.

Wizard for creating Compare reports

In the new version, you can create a Compare report in a simpler way with the support of a wizard. Please note that you will only be able to create Compare reports when you have the plug-in *SR-Advanced Report*.

To create a compare report, go to *Report > Construction > Content* and click the *Data set* 🗄 button in the toolbar. Start by

clicking the ➕ button and the option *Add dataset*, and add the data sets of the surveys you want to compare. Next, click the

Add ➕ button again and select *Add compare data set* in the drop-down list. After that, the wizard will open and you can enter a *Name* and select the *Available data sets* of your choice. The uppermost data set you select will be considered as the *Primary data set*. You can also decide whether you want to enable the setting *Add and match variables automatically* or not. If your data sets are similar, it is recommended that you activate the setting to save time. Do not enable it if you wish to select the variables manually from each data set.
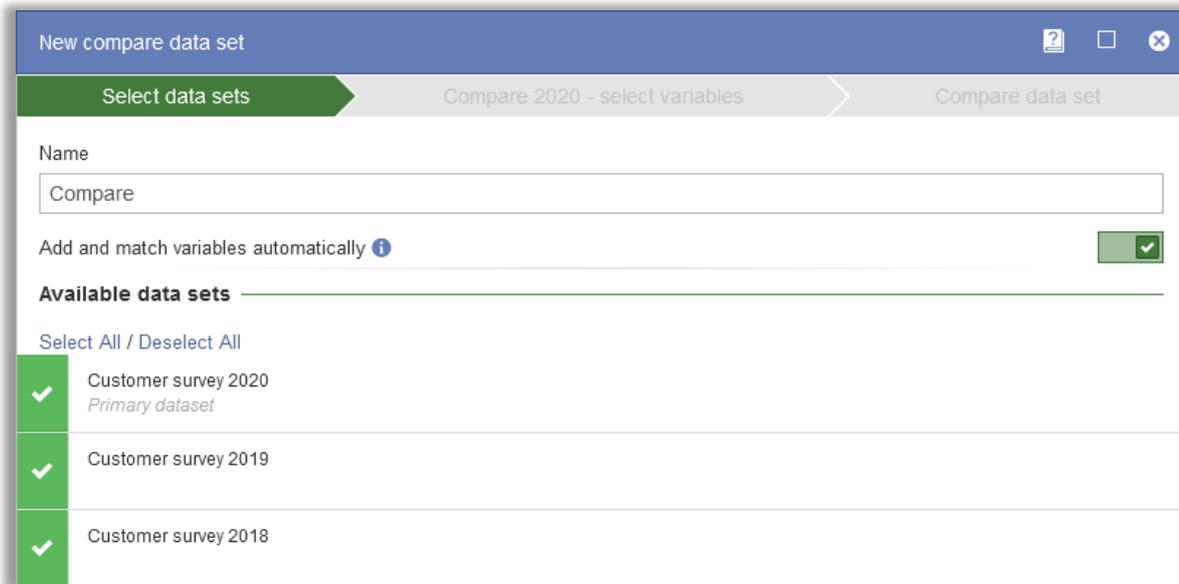
In the second step, you select the variables you want to include in the comparison, from the primary data set.
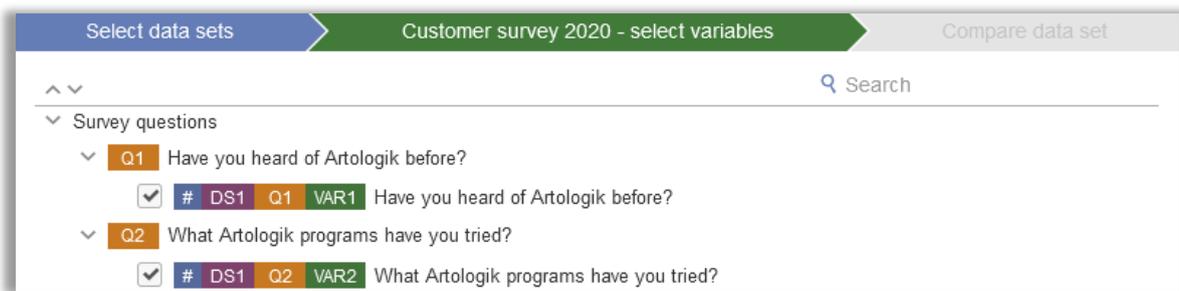
Click on *Next* to go to the last step. There, you will see the compare data set with your selected survey questions. You can add

more variables by clicking the *Add variable* button. In this step, you will also see the ⚠ symbol next to any variables that have not been correctly matched. This can be the case if the titles of the questions, or their answer options, were not identical in the surveys you compare. When you click a variable, you will be able to manually match the variable in the right part of the window.
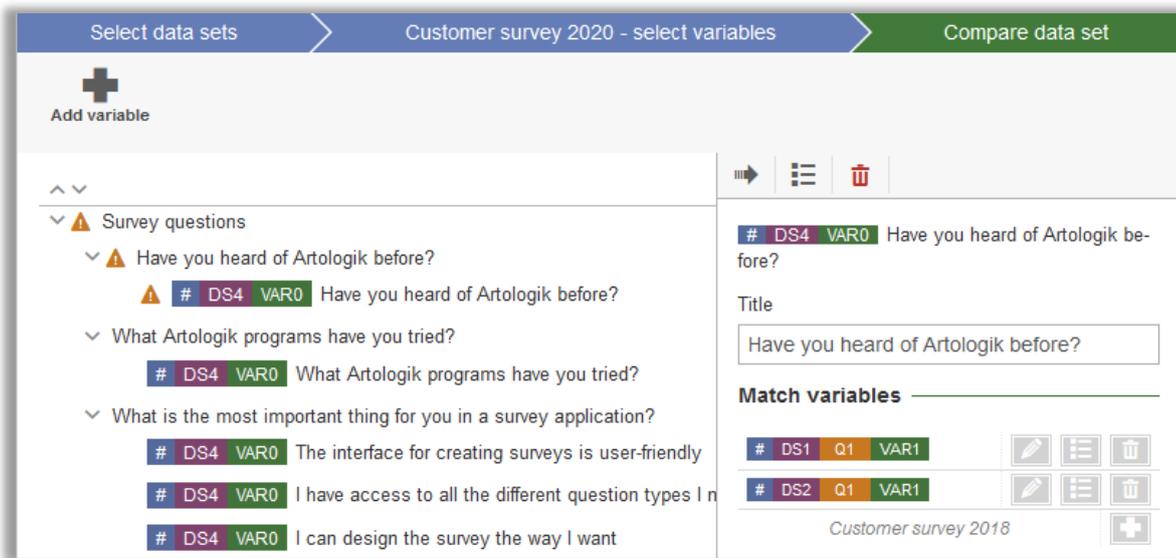
Lastly, click the *Finish* button and your compare data set has been created. The data set can be edited in case you want to make some changes.

To present the compare report, click the *Regenerate report* button in the toolbar under *Content*. Select *Generate variables from: Dataset* and click *Next*. Click the tab for the *Compare* data set, select the variables you want to include, and click *Finish*. Click the button *Common background series*, click the tab for the *Compare* data set and select the variable *Background variable: Data set*.

Divide reports into different pages, when showing them under Preview and via link
The export format "online" no longer exists in the new version. However, it is possible to view the report in the *Preview* and to share it via a link.

You can now add new pages to the report under *Report > Construction > Content* by clicking the *Add page* button. After that, paging will appear on the bottom of the page. To switch to a new page, please click the numbers or arrows:

The report is now divided into different pages and can be viewed under *Report > Construction > Preview* or via a link that can be found in the report *dashboard*.

New interface for exporting reports
In the new version, all exporting of reports from within the administration is made from the same page: *Distribution > Exports*. There, you can directly export the report to PDF, Word or PowerPoint by using the icons under *Export with auto layout*.

If you are not satisfied with the automatic layout decided by the program, you can instead create your own layout where you for example create your own page breaks. Under *Export with self-defined layout*, you click the *Create new layout* button to go to the page where you edit the new layout. When you are done, you go back to the *Export* page where you click the button to save the export in the desired format; PDF, Word or PowerPoint.

On the export page, you can also export the report's dataset to Excel.
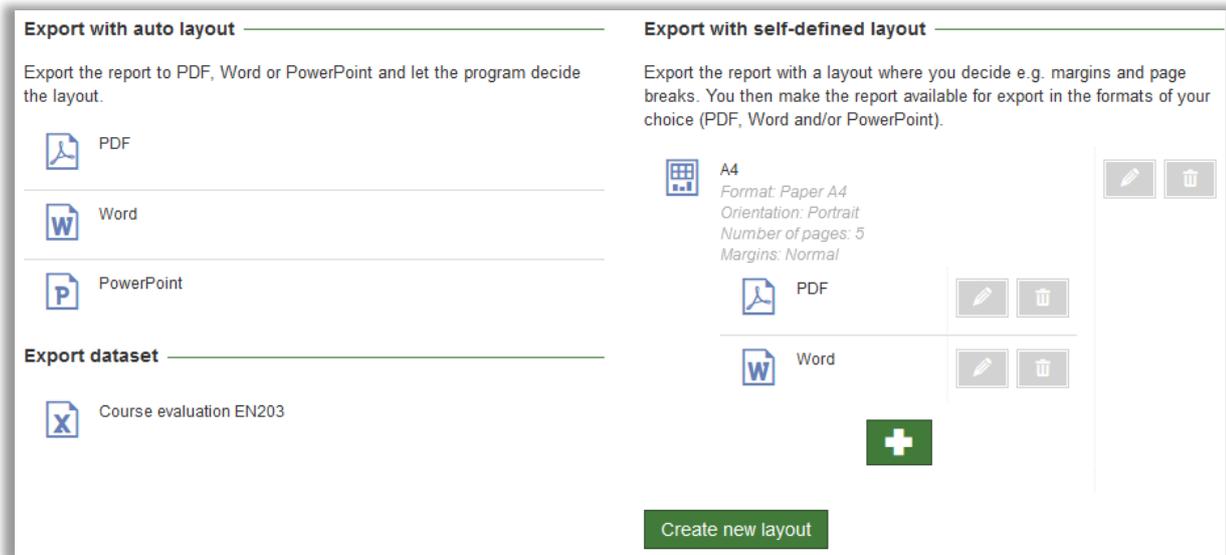
Wizard for creating subreports

We have improved the work-flow for creating and working with subreports. You now create subreports via a wizard, starting from the report's dashboard or from *Distribution > Subreports*. In the wizard's first step, you can among other things define into which formats it shall be possible to export the subreport to. Here you can also make the subreport publicly accessible via a link.
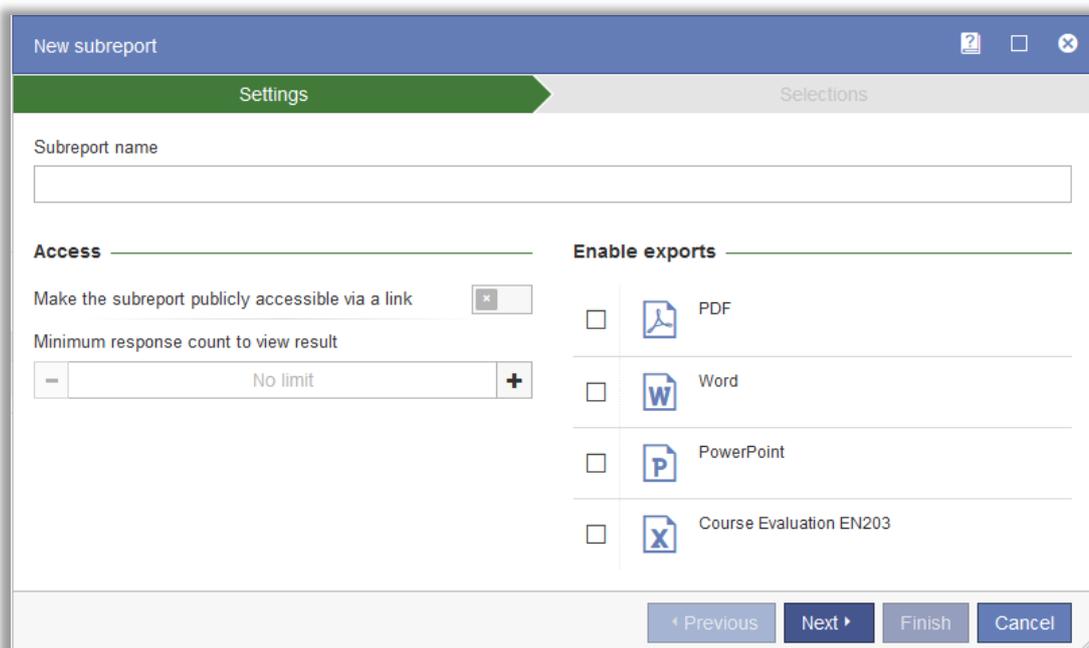
In the second step, you select the variable(s) which shall be used as selection in the subreport.

You can now always view a subreport from the program without making it publicly accessible via a link. Just click the 🗗 icon next to the subreport, from the report's *dashboard* or from *Distribution > Subreports*.

Subreports	20

Region
Published: No
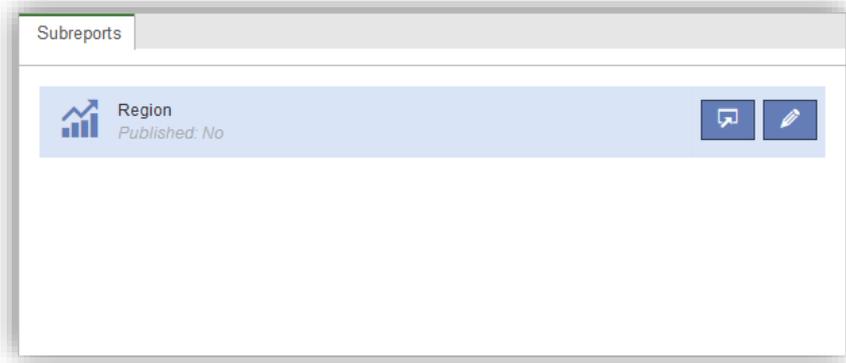
Templates

Possible to add emails to survey templates

It is now possible to add emails to survey templates. In the same way as for email schedules, you specify each email's send date based on the publication date of the survey (created from the template).

Email type ⇕	Subject ⇕	Date ⇕	
First email	Please answer our survey: "$SurveyName$"	+0 day(s) at 09:00	🖉
Reminder	Reminder	+7 day(s) at 09:00	🖉

New interface for creating report templates

In the new version, the interface for creating report templates (*Templates > Reports > Report templates*) has a completely new look as well as some new functions. It is now possible to add a hybrid element and you can also choose between more options for report item templates.
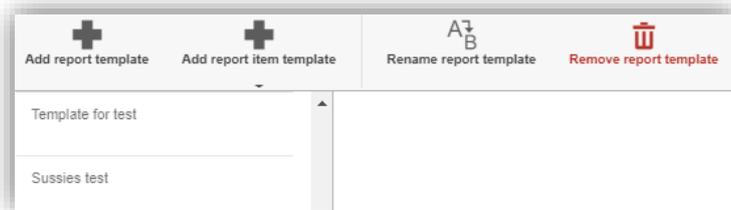
You now have an overview of already existing report templates in the list on the left side of the window. You can either edit one of these by simply clicking it, or you can create a completely new report template by clicking the *Add report template* Button.

Furthermore, you now have more report item templates options, and can therefore create templates for various different types of information:

- Default
- Question type
- Respondent categories
- Language
- Answer date
- Answer time
- SR-Advanced report (Plug-in): You can choose between Compute or compare variables

Once you have decided to edit or add a report item template, you will be able to customize the template. The functions *Add text element, Add table element, Add chart element* and *Split to two columns* remain the same, but you now have one more

option: *Add hybrid element*. With a hybrid element you can present a compact overview of survey results in a combination of table and chart items.
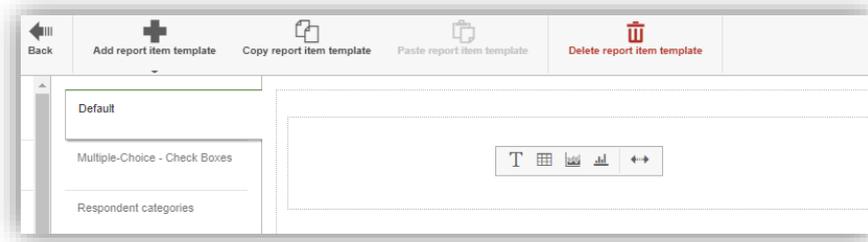
Once you have created the template, you can use it when creating a report. By clicking *New report* under the *Report* menu, you open the wizard that will guide you through the process of creating a report. In the last step (*Basic information*) you can choose your report template. It will then be added to the report once you click on the *Finish* button.

It is also possible to use more than one report template within one report. However, the template will only apply to the new report item that will be added. To do that, go to *Report > Construction > Content* and click on *Add report item*. You will then be able to select another report template of your choice.

Possible to create templates for survey introduction texts

It is now possible to create introduction text templates for surveys. If you want to give your respondents a short introduction e.g. explaining the purpose of the survey or give some general information about the evaluation process, you can select one of your predefined templates to display at the start of a survey.

You create survey introduction text templates under the menu *Templates > Survey design > Introduction text*.

Possible to create templates for report introduction texts

It is now possible to create introduction text templates for reports. Give general information about the survey the report is based on and the report itself. You can e.g. add report name, survey name, number of respondents, answer count and answer frequency.

You create report introduction text templates under the menu *Templates > Report design > Introduction text*.

Administration

New user group rights

Rights in ver. 5 - Surveys tab	Corresponding right in ver. 4 (blank field = no changes)
Survey menu	
Construction	Survey construction
Settings	New separate right in ver. 5. Part of "Survey construction > Basic information" in ver. 4
Automation	New separate right in ver. 5. Part of "Survey construction > Basic information" in ver. 4
Content	Merged right in ver. 5 for: Survey construction > Questions and Survey construction > Templates
Select survey theme at question level	
Branching logic	New separate right in ver. 5. Part of "Survey construction > Questions" in ver. 4
Design	
Question settings	Save question settings
Theme settings	Save theme settings
Distribution	Data collection
Settings	New separate right in ver. 5. Part of "Survey construction > Basic information" in ver. 4
Respondents	
Add new respondents	New respondent
Import respondents (heading)	New heading
From the respondent database	
From a survey	
From an email list	
From a file	
From LDAP	
Respondent comment	
Emails and letters	Mailings
Change reply address	New separate right in ver. 5. Part of "Mailings" in ver. 4
Change sender name	New separate right in ver. 5. Part of "Mailings" in ver. 4

Rights in ver. 5 - Surveys tab	Corresponding right in ver. 4 (blank field = no changes)
Email inbox	New separate right in ver. 5. Part of "Mailings" in ver. 4
Letter	New separate right in ver. 5. Part of "Mailings" in ver. 4
Paper survey	
Other distribution	New right in ver. 5 for a new menu
Answers	New right in ver. 5 for a new menu
Show answers	New right in ver. 5 for a new function
Export data	Data collection > Export
Handle text answers	Data collection > Text answers
Survey actions (heading)	New section heading
Create new surveys (heading)	New heading
New blank surveys	New separate rights in ver. 5. Part of "Create new surveys" in ver. 4
New surveys from template	Report content
Copy surveys	
Finish construction	
Reopen construction	New right in ver. 5 for a new function
Close surveys	
Reopen surveys	New right in ver. 5
Anonymise surveys	New right in ver. 5
Postpone anonymisation	New right in ver. 5
Archive surveys	New right in ver. 5
Restore surveys from archive	New right in ver. 5
Change owner	New right in ver. 5 for a new function
Delete surveys	New heading
Delete own surveys	New right in ver. 5
Delete assigned surveys	New right in ver. 5
Access to surveys (heading)	New section heading
All surveys	
Assigned surveys	
Other survey settings (heading)	
View owner profile	New right in ver. 5

Rights in ver. 5 - Reports tab	Corresponding right in ver. 4 (blank field = no changes)
Activate the 'Save' button on anonymous surveys	
Unlimited numbers of respondents per survey	
Increase respondent limit up to the personal maximum, at survey level	
Respondent answers (heading)	New heading
Submit new answers	New right in ver. 5
Submitted answers	New right in ver. 5
Reports menu	
Construction (heading)	New heading
Settings	Basic information
Content	Report content
Data set	
Distribution (heading)	New heading
Export	
Layout	
Main report	New separate rights in ver. 5. Part of "Distribution and subreports" in ver. 4
Subreports	
Report actions (heading)	New section heading
Create new reports (heading)	New heading
Create new standard report	New separate rights in ver. 5. Part of "Create new reports" in ver. 4
Create new aggregate report	
Generate report from predefined report	
Copy reports (not yet implemented)	New right in ver. 5 for a new function
Delete reports (heading)	New heading
Delete own reports	New right in ver. 5
Delete assigned reports	New right in ver. 5
Aggregate reports (heading)	New section heading
All aggregate reports	
Assigned aggregate reports	

Rights in ver. 5 - Reports tab	Corresponding right in ver. 4 (blank field = no changes)
Templates menu	
Surveys	Survey templates
Create new survey templates	New survey template
Delete survey templates	New right in ver. 5
Construction	New separate rights in ver. 5. Part of "Edit survey template" in ver. 4
Settings	
Automation settings	
Content	
Branching logic	
Design	
Question settings	
Theme settings	
Distribution	
Settings	
Emails and letters	
Predefined reports	
Connect predefined reports	
Edit predefined reports	
Question templates	
Report templates	
Survey design	
Theme	
Header, Footer, Introduction text and 'Thank you' message	Edit survey header, footer and thank you message
Report design	
Theme	
Header, Footer and Introduction text	Edit report header and footer
Consent forms (heading)	New heading
Consent - Survey	Personal data > Consent - Survey
Consent refused - Survey	Personal data > Consent refused - Survey
Consent - Add respondent	Personal data > Consent - Add respondent

Rights in ver. 5 - Templates tab	Corresponding right in ver. 4 (blank field = no changes)
Consent - User	Personal data > Consent - User
Consent - Add user	Personal data > Consent - Add user
Style sheet editor (CSS)	Edit theme with style sheet editor (CSS)
Administration menu	
System (heading)	New heading
Users	
Groups	New separate right in ver. 5. Part of "Users" in ver. 4
Organisations	
Dashboard	New right in ver. 5 for a new function
Public start page	Templates > Public design > Edit public header
Languages	New separate right in ver. 5. Part of "Languages and translations" in ver. 4
Statistics	
Plug-ins	
Menu links	New separate right in ver. 5. Part of "Administration > Settings" in ver. 4
Logs	New right in ver. 5 for a new function
Settings	New separate right in ver. 5. Part of "Administration > Settings" in ver. 4
LDAP	
Surveys (heading)	New heading
Question types	New separate right in ver. 5. Part of "Administration > Settings" in ver. 4
Survey categories	New separate right in ver. 5. Part of "Administration > Settings" in ver. 4
Survey languages	New separate right in ver. 5. Part of "Languages and translations" in ver. 4
Survey automation settings	New separate right in ver. 5. Part of "Administration > Settings" in ver. 4
Translate survey texts	New separate right in ver. 5. Part of "Languages and translations" in ver. 4

Rights in ver. 5 - Administration tab	Corresponding right in ver. 4 (blank field = no changes)
Translate help text	New separate right in ver. 5. Part of "Languages and translations" in ver. 4
Settings	New separate right in ver. 5. Part of "Administration > Settings" in ver. 4
Paper survey	
Reports (heading)	New heading
Predefined reports	
Translate report texts	New separate right in ver. 5. Part of "Languages and translations" in ver. 4
Translate help text	New separate right in ver. 5. Part of "Languages and translations" in ver. 4
Settings	New separate right in ver. 5. Part of "Administration > Settings" in ver. 4
Respondents (heading)	New heading
Respondents	
Respondent categories	New separate right in ver. 5. Part of "Respondents" in ver. 4
Respondent properties	New separate right in ver. 5. Part of "Respondents" in ver. 4
Manage duplicates	New separate right in ver. 5. Part of "Respondents" in ver. 4
Settings	New separate right in ver. 5. Part of "Respondents" in ver. 4
Email (heading)	New heading
Email accounts	
Email inbox	New separate right in ver. 5. Part of "E-mail accounts" in ver. 4
Email schedule	Mailing schedule
Email templates	Mailing templates
System templates	New separate right in ver. 5. Part of "Mailing templates" in ver. 4
Letter templates	New separate right in ver. 5. Part of "Mailing templates" in ver. 4
Personal data (heading)	New heading
Personal data report	Personal data > Personal data report

Consent settings	Personal data > Settings
File manager (heading)	New section heading
File Manager	
My files	
Public files	
Other settings (heading)	New section heading
Additions of authorised users regardless of organisation	Surveys > Other survey settings > Add authorised users regardless of organisation

User information

The user information can be found under *Administration > System > Users*. There you can save information about each user in the system.

In the new version, some of the information/fields from the old version have been removed:

- Street address
- Zip code
- City
- Country
- Phone number
- Cell phone number
- Fax

Statistics – display on screen and export to Excel

Would you like to get an overview of statistics such as how many reports have been created during the last month, or see information on e.g. which surveys are using which survey themes, or which surveys have been created based on a template?

Under *Administration > System > Statistics* you can now view statistics for the number of surveys per status, the number of times users have logged in, how many answers have been given on surveys, as well as the number of created reports. You can also export these statistics into an Excel sheet whether it's surveys, survey templates, reports and/or predefined reports.

You can use various filters to define for which surveys and reports you wish to export statistics.

Logs

In the administration, you now have a new function called *Logs* which can be found under *Administration > System > Logs*. These log files contain information about events that have occurred within Survey&Report such as errors.

On the left side of the window, you will find a list of different features and the date the last time an event has occurred. To get a more detailed view, simply click on one of the features in the list and you will see a record with different dates. Click on the date you would like to find more information about and a list will appear. There you will find the exact date and time of the event as well as a sign that shows error or info. Once you click on one of the events, a window with a more detailed description will open. In the toolbar at the top, you can click the *Report application error* ▤✉ button if you wish to report the event.

Possible to create several email templates for each mailing type

In this version, you create a new mailing on a survey via a wizard. In the wizard's first step, you select the mailing type, eg. *First email* or *Reminder*, and when you come to the wizard's second step you can choose from the templates created for that mailing type.

Under *Administration > Email > Email templates*, you can now create as many templates for each mailing type, as you wish.

Email schedules - new functionality

Email schedules in Survey&Report is a way to prepare a set of emails, where the send date is based on the date the survey is published. You can, for example, create an email schedule that consists of one first email and three reminders.

In version 4, you could only create one email schedule, and that schedule was automatically connected to all new surveys when they were created. In the new version, you can create several email schedules. None of them is automatically connected to new surveys, but instead you can on each survey choose to manually insert the desired email schedule.
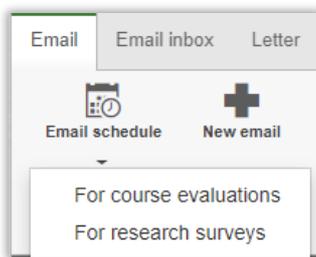
If you want emails to be automatically connected to new surveys, we recommend that you use the new possibility to create emails on survey templates, see the section above.

System templates for emails

System email templates are now multilingual.

Possible to decide whether to allow database respondents

When you add or import respondents to a survey, you can decide whether the respondents should be stored in a system-wide respondent database, or as survey-specific respondents on each individual survey. The former option can be useful for organisations who have a smaller number of respondents who they always keep updated in the database.

However, in organisations with a lot of users, the risk is that the system-wide respondent database after a while will contain thousands of respondents, and a lot of duplicates. To avoid this, it is now possible to turn off the possibility to save new respondents in the system-wide respondent database. You do this via the setting *Allow database respondents* under *Administration > Respondents > Settings*. After this setting has been inactivated, all respondents who are added to surveys will be added as survey-specific respondents and the tab *From the respondent database* will no longer be available in the *Import respondents* window.

Sometimes, you want respondents to participate in several surveys with the same username/password in all surveys. To achieve that in version 4, those respondents had to be database respondents. In the new version this is not necessary, since multiple survey-specific respondents can have the same username as long as they are not connected to the same survey.

Warning if the same Export ID is used on several questions

The new setting *Check for ExportID duplicates* is implemented to notify you whenever you are creating a question and enter an *ExportID* that is identical to one of a different question from the same survey, which will help you to prevent mistakes in data exports. This setting comes with two different actions:

- *Warning*, the first action, is a pop-up warning window that will immediately alert you if you insert the same *ExportID* found in another question, specifying the question to which that *ExportID* is a duplicate. Nevertheless, if you want the duplicates to remain the same, you will still be able to save your question.

- *Block*, the second action, only differs from *Warning* in that you will not be able to save your question until you delete or change the *ExportID* duplicate.

To activate one of these actions, enable Check for *ExportID duplicates* under *Administration > Surveys > Settings > Handle duplicates* and, once enabled, select *Warning* or *Block* in the *Action* drop-down list.

Warning if the same text is used for several answer options on the same question

When creating answer options for a question, you can now enable the new *Check for answer option duplicates* setting that will notify you when two or more of the same questions answer options are identical, which will help you to avoid making repeated mistakes. This setting is formed by two actions:

- *Warning*, the first action, displays a warning sign ⚠ on the right side of the repeated answers, together with the message "*The answer option is a duplicate*" when hoovering over the field. Nevertheless, should you want the duplicates to remain the same, you will still be able to save your question.

- *Block*, the remaining action, will also display "*The answer option is a duplicate*" message when hoovering over the field, along with the no entry symbol 🚫 on the right side of the repeated answers, impeding you from both saving your answer options and proceeding to create new ones until you change or delete the duplicates.

To activate this setting, enable *Check for answer option duplicates* under *Administration > Surveys > Settings > Handle duplicates* and, once enabled, select *Warning* or *Block* in the *Action* drop-down list.

The settings on the page "Group-specific settings" has been removed

In version 4 you could specify, per user group, the default settings for which fields are to be displayed in the respondent list, and whether the quick edit option is to be allowed with *Group-specific settings.*

The Group-specific settings no longer exist. Its functions, such as the quick edit option and which fields are to be displayed are now found under Inline editing and Show/hide columns.

- While *Inline editing* is activated, you are able to directly edit respondent fields from the respondent list.

- Using *Show/hide columns*, you can define which respondent information will be visible in your respondent list by adding and removing columns of your choice.
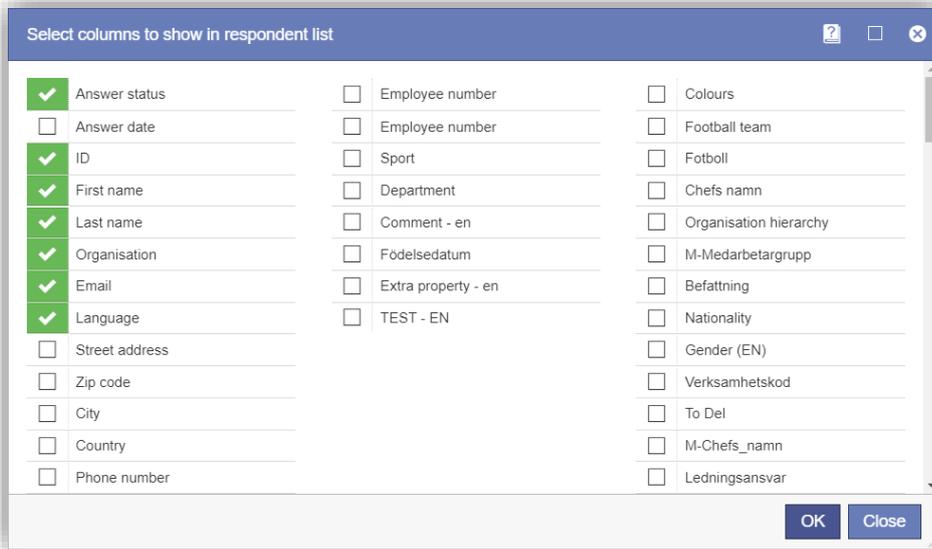
"Missing value" in exports for questions that were hidden from the respondent

When exporting raw data, you now have the possibility to define specific missing values for questions or subquestions that have been hidden from respondents as part of the actions established in the branching logic of the survey. You can do so under *Administration > Survey > Settings > Export Settings > Missing value for questions not seen by the respondent*.