Survey&Report 5.0

A guide to what is new

Structure

- Survey menu / dashboard / settings

- Survey creation
  ✓ How to create a new survey
  ✓ Language options
  ✓ Question options

- Survey distribution
  ✓ Publishing
  ✓ Emails and respondents
  ✓ Answers
  ✓ Other distribution methods

- Reports and Subreports
  ✓ How to create a new report
  ✓ Content
  ✓ Export
  ✓ Subreports

- Administration

Survey&Report 4.3.

Survey&Report 5.0.

Colour legend

Please note: specific colours are used in the presentation as follows:

- **Red**: Old version

- **Green**: New version

Survey dashboard / menu / settings

Survey dashboard

The survey dashboard works as a starting page for the survey. It gives a summary of the survey information and access to all pages and actions. Access it by clicking 🏠 at the top of the left menu.

The dashboard is divided into several parts, with content depending on the survey status: *Survey information, Created reports, Statistics, Shortcuts* and *Changelog*.

Actions may include:
- *Finish construction*
- *Reopen construction*
- *Close survey*
- *Reopen survey*
- *Archive survey*
- *Restore from archive*
- *Anonymise*

Main menu – Survey
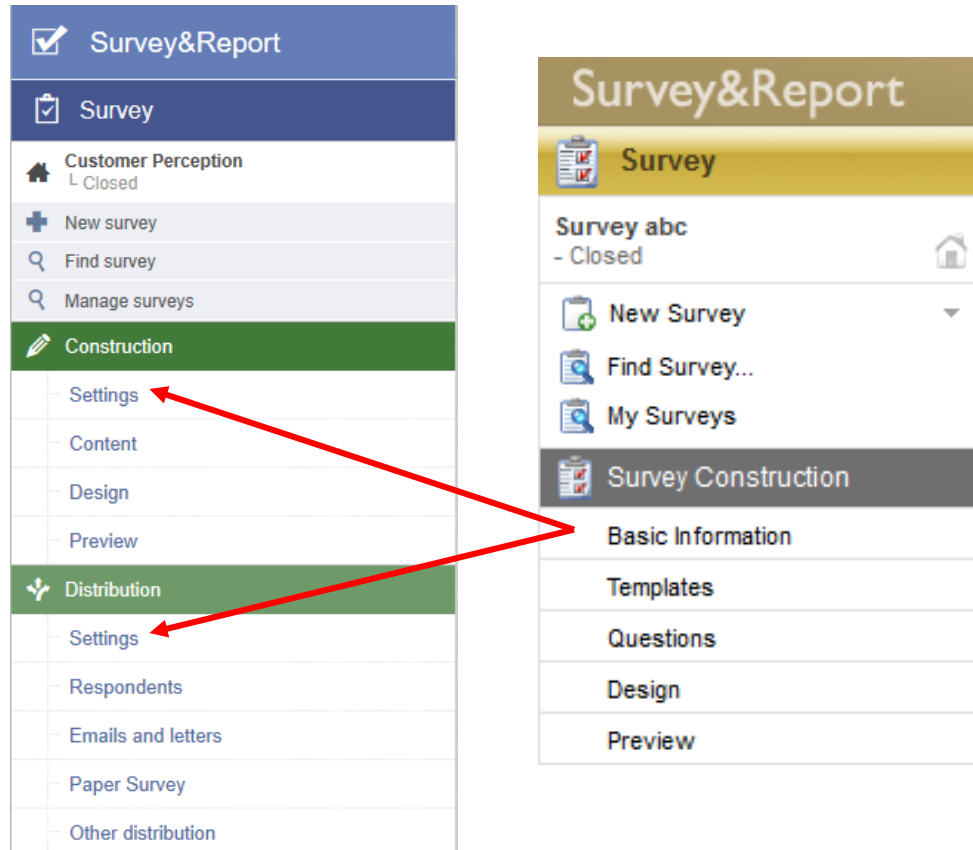
While Survey&Report's functionalities remain the same or have been expanded, some of them can now be found in other places, e.g. headers and introduction texts can now be added under *Survey* > *Construction* > *Content*.

Several of the tabs under *Basic Information* in version 4 are now available on the two *Settings* pages under *Survey Construction* and *Distribution*.

Main menu – Survey
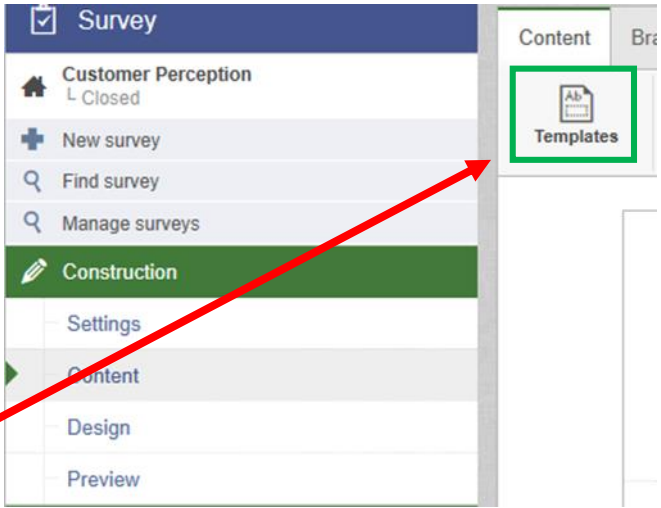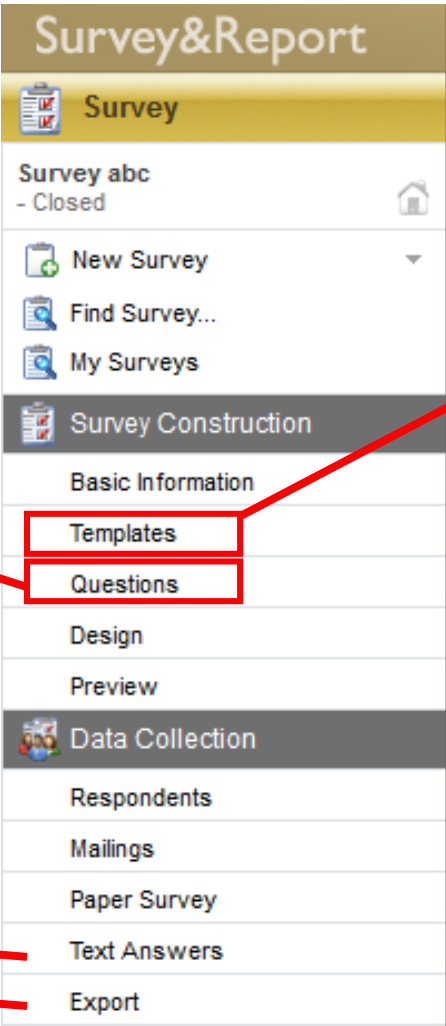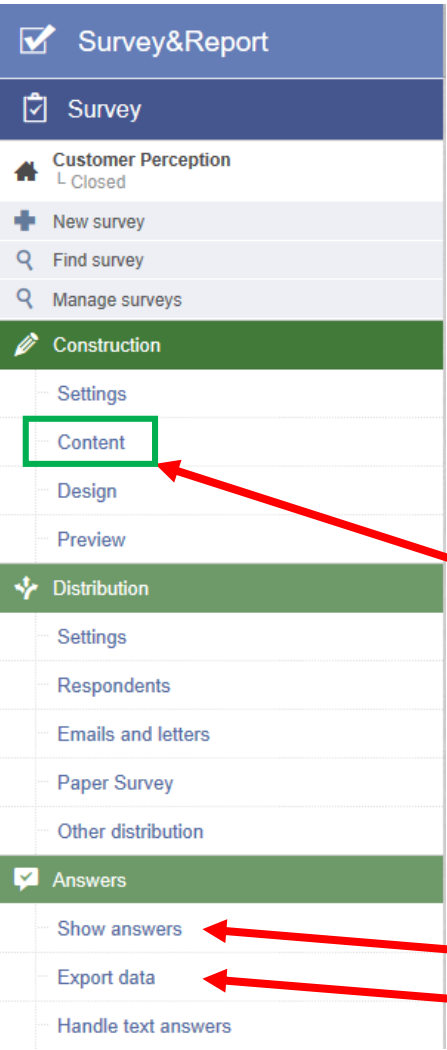
Templates can now be found in the top menu under *Content.*

Questions are now included in *Content.*

Text Answers (now called *Handle text answers*) and *Export* (now called *Export data*) now have their own new section within the title *Answers* as well as an additional subsection called *Show answers*.

Survey creation

New survey

To create a new survey, go to *Survey* > *New survey* in the main menu and a pop-up window will appear. There you can choose between creating a *new blank survey*, *copying an existing survey* or *creating a new survey based on a template*.

New blank survey

Choose a *Survey name*, *Survey type* and the *Languages* that shall be available.

Depending on your choice of survey type, different settings are displayed in the right section.

All settings can be edited later under *Survey* > *Distribution* > *Settings*.

New survey from template
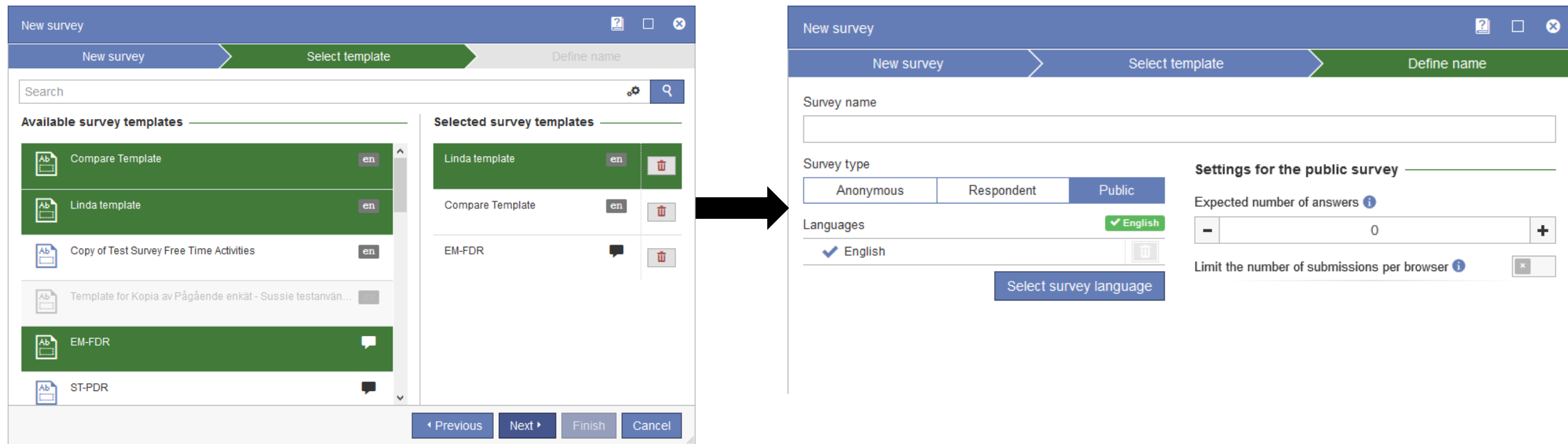
When you click *New survey from template*, you land on the page *Select template* where available templates are listed. Select a template by simply clicking it.

Your selected template(s) are then moved to the right side of the window. Add as many templates as you wish and use drag and drop to change the order of the selected templates. All questions and logic from the selected templates will be added to the survey. Design and settings will only be fetched from **the first template** in your list of selected templates.

Click *Next* to continue on to the *Define name* page, where you can edit the name and the survey settings (*See New blank survey).*

Copy existing survey

When you click *Copy existing survey*, a list of the 50 newest surveys you have the right to see will be shown on the first page. If there are more results, numbered pages will be shown at the bottom of the page for you to click through, or use the search field on the top to find your desired survey. Select the survey you want to copy by clicking on it.

On the *Define name* page, you can edit the default survey name *"Copy of [survey name]"*. It is also possible to edit the survey settings (*See New blank survey* above) or you can click *Finish* to create a new survey using the predefined settings from the copied survey.

Add language(s) for survey translation

Click *Select survey* language to select one or more languages that your survey should be available in.

Thank You Message; Consent

The *Consent Form* and *Consent Refused* can now be modified under *Survey > Construction > Settings* , while the *Thank you Message* can be edited under *Survey > Distribution > Settings > At completed survey*.

Introductory text, Header/Footer

Introductory text, as well as *Header* and *Footer* can now be directly edited in the survey under *Survey > Construction > Content*.
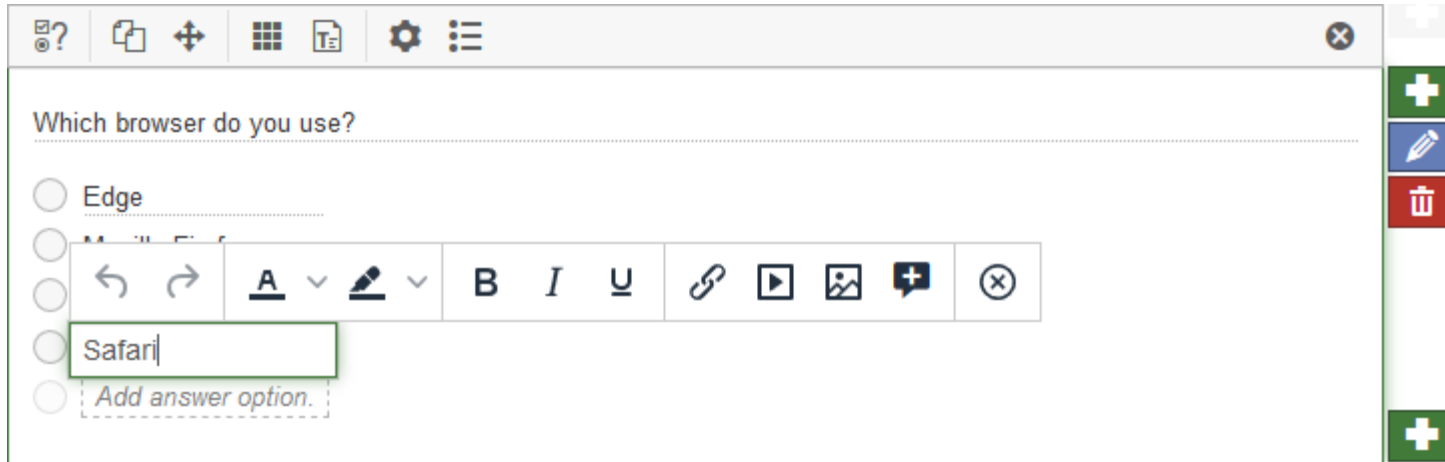
Questions
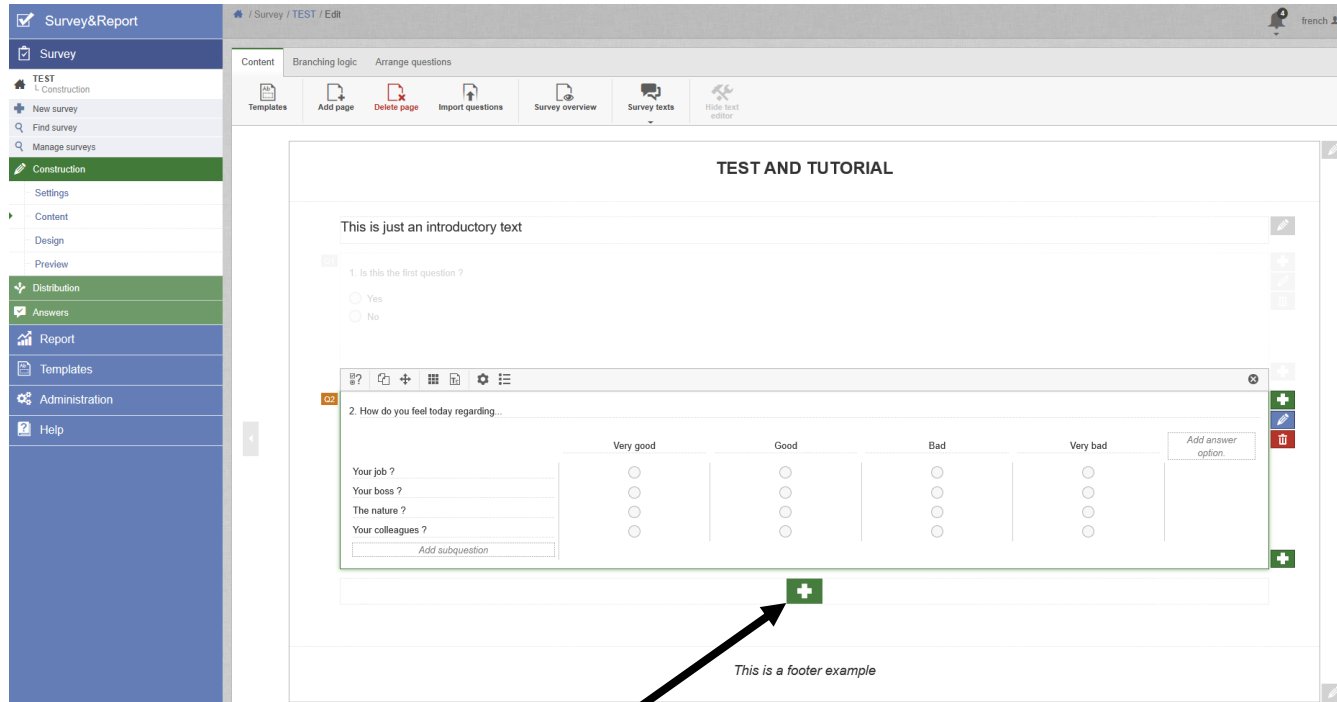
Click the ➕ button to add a new question – then select a question type.

Inline editing

In the new Survey&Report version, it is now possible **to edit the questions directly** via **inline editing** on the *Content* page.
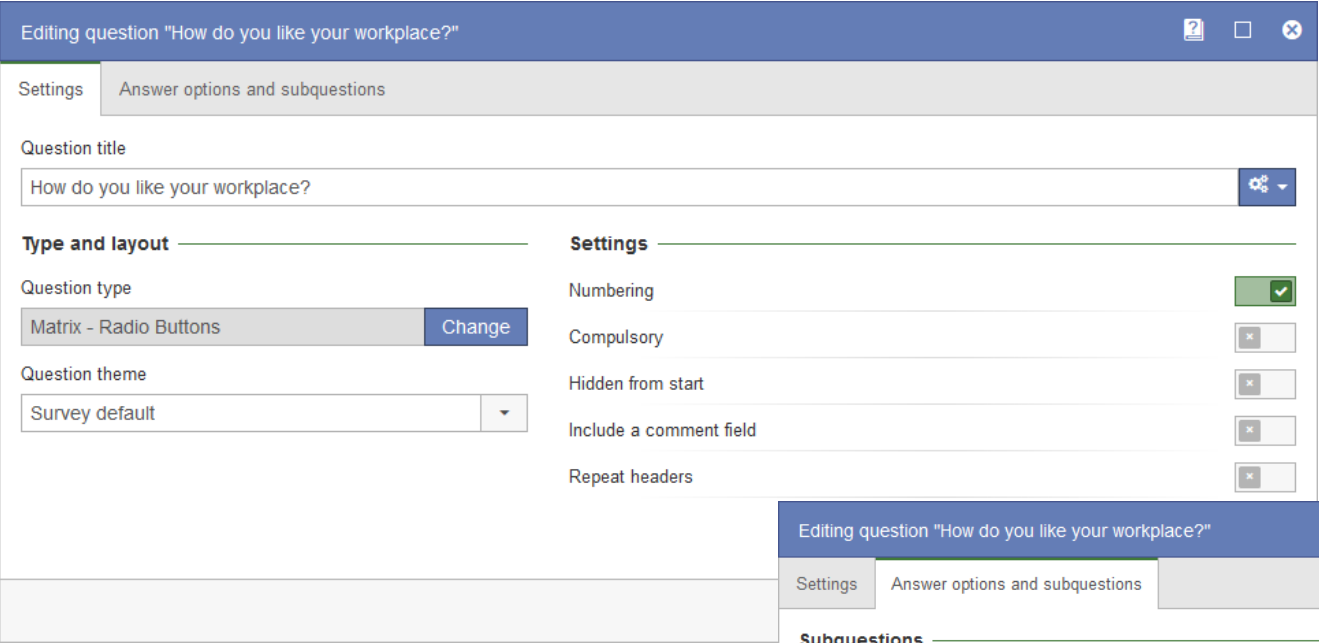

Add **design elements** and/or a **comment field** to your question when doing the inline editing by clicking the corresponding buttons in the toolbar of the inline editor.
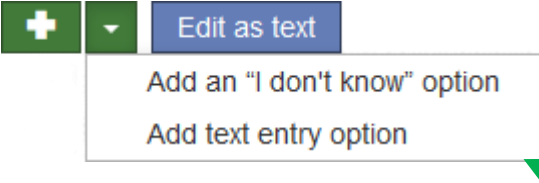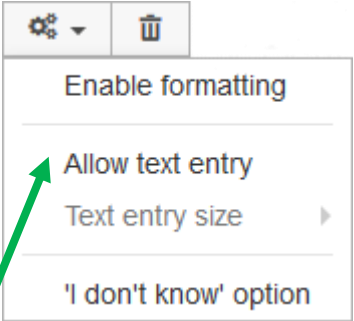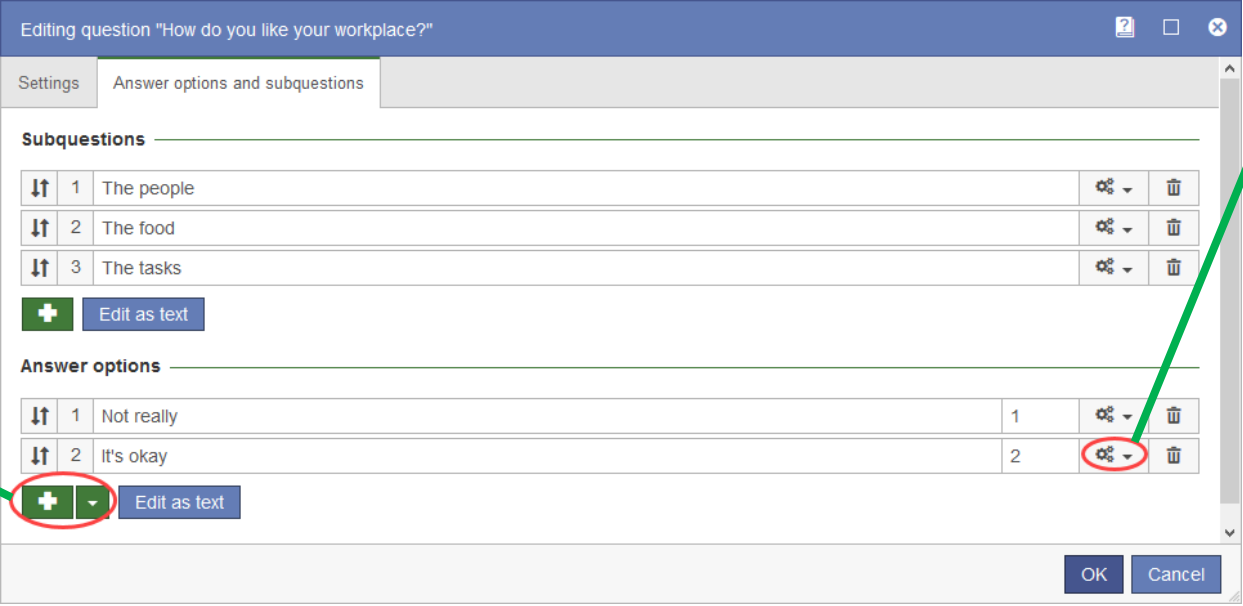
When editing the content of the question, a number of buttons for formatting the text will appear.

One of them is the 💬 button that allows you to reuse your respondents' previous answers in later questions on later pages within the same survey. You can insert this so called *Piped answer tag* in a question title, subquestion or design element.

Advanced editing

Editing question "How do you like your workplace?"

Settings | Answer options and subquestions

Question title

How do you like your workplace?

Type and layout

Question type

Matrix - Radio Buttons | Change

Question theme

Survey default

Settings

Numbering ✓

Compulsory ✗

Hidden from start ✗

Include a comment field ✗

Repeat headers ✗

After clicking the ✎ button, the *Advanced editing* window with the tabs *Settings* and *Answer options and subquestions* opens.

Enable formatting

Allow text entry

Text entry size ▶

'I don't know' option

Editing question "How do you like your workplace?"

Settings | Answer options and subquestions

Subquestions

↕ 1 | The people
↕ 2 | The food
↕ 3 | The tasks

➕ | Edit as text

Answer options

↕ 1 | Not really | 1
↕ 2 | It's okay | 2

➕ ▾ | Edit as text

OK | Cancel

➕ ▾ | Edit as text

Add an "I don't know" option

Add text entry option

Translate survey content into another language

To **translate** the content of your survey, go to *Survey > Construction > Content > Survey texts*, where you will be able to select the *Translate* option by clicking .

You can add all languages you wish to translate the survey into in order to have this option enabled. (See *Add language(s) for survey translation*).

# Translate survey content into another language (single question)

Translate single questions manually under *Construction* > *Content by* clicking the pen icon and then selecting the language to which you want to translate your question in the yellow box on the top of the window.

Branching logic
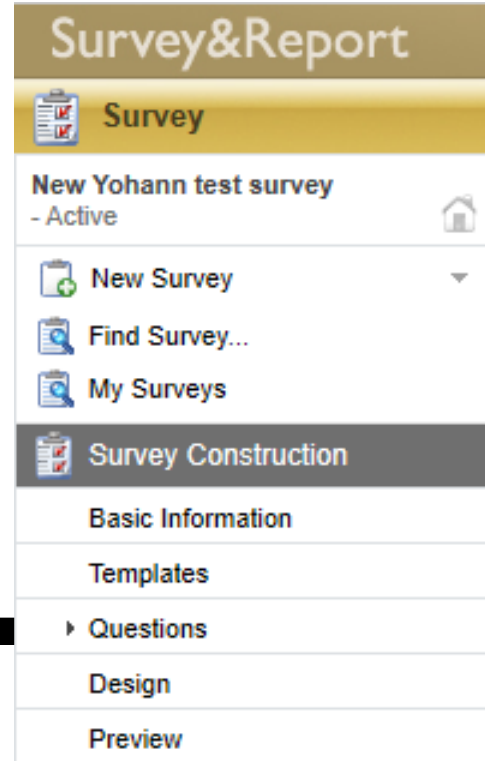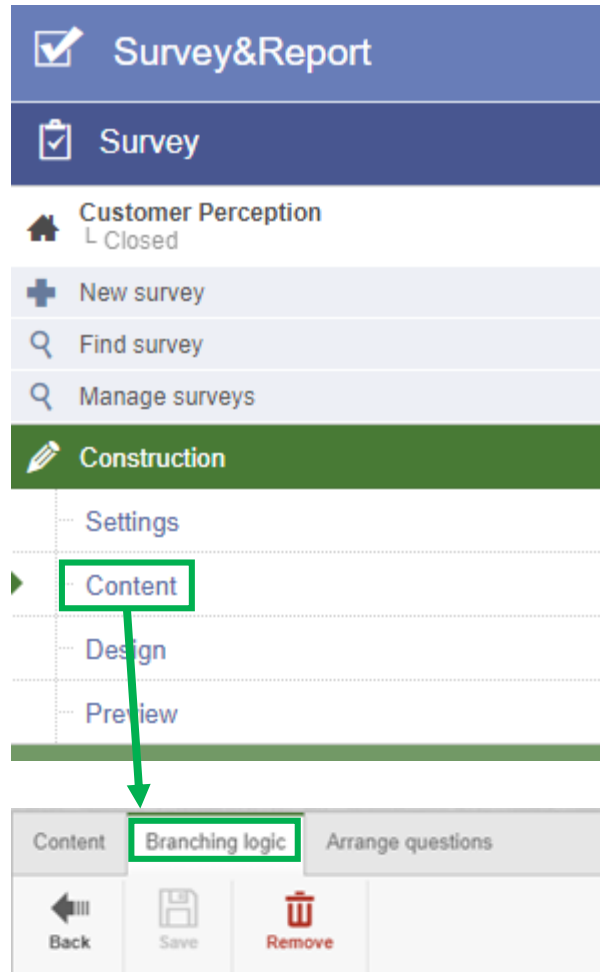
In version 4, the *Branching logic* (before refered to as *Conditions*) option was to be found in *Survey Construction* > *Questions*. In version 5, branching logic is located under *Construction* > *Content* > *Branching logic*.
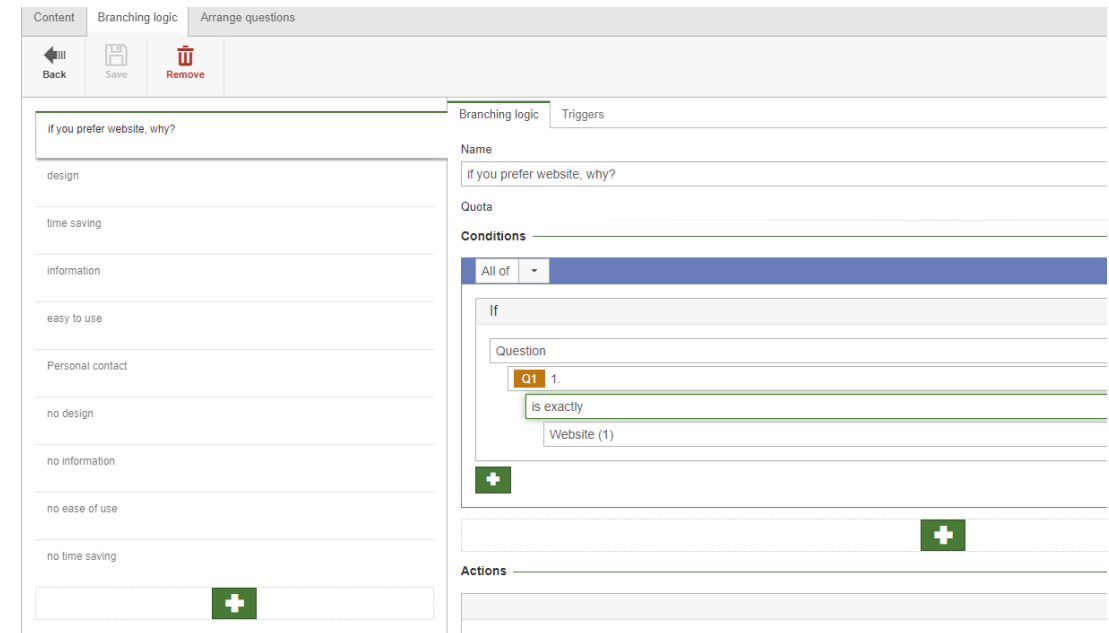
Triggers & Quota

Branching logic	Triggers		
When a survey page is loaded ⓘ			☒
When a conditional question is answered or the answer is changed ⓘ			☑
When leaving a survey page ⓘ			☒
When the survey is submitted ⓘ			☑

Condition	Advanced settings

Name: The end

Apply: ☑ when a survey page is loaded
☑ when a conditional question is answered or the answer is changed
☑ before a survey page is left
☑ when the survey is submitted

Branching logic	Triggers

Name

The end

Quota ☑

Counter

Current value
⊖ 0 ⊕ − +

Quota limit
⊖ 0 ⊕ − +

Condition	Advanced settings

Name:

Quota limit: 100

Current value: 0

↻ Reset

To use the quota that was formerly found under the tab *Quota* in the *Questions* section, you now enable the setting *Quota* when editing your survey's branching logic.

Survey distribution
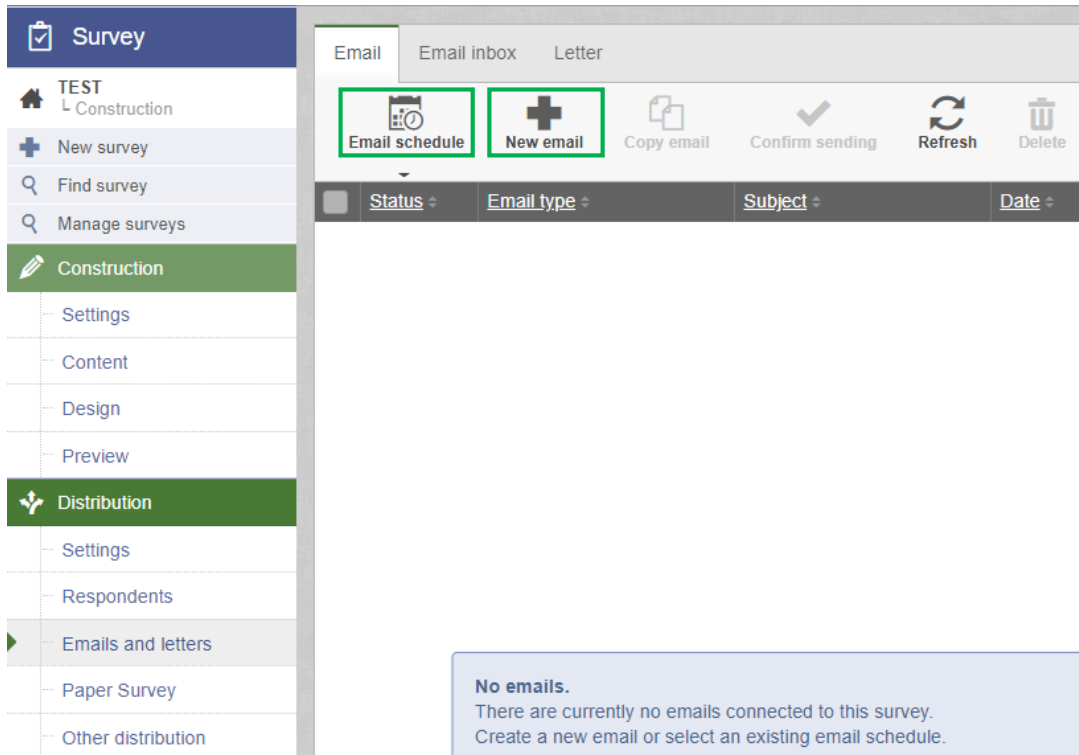
Emails & Respondents
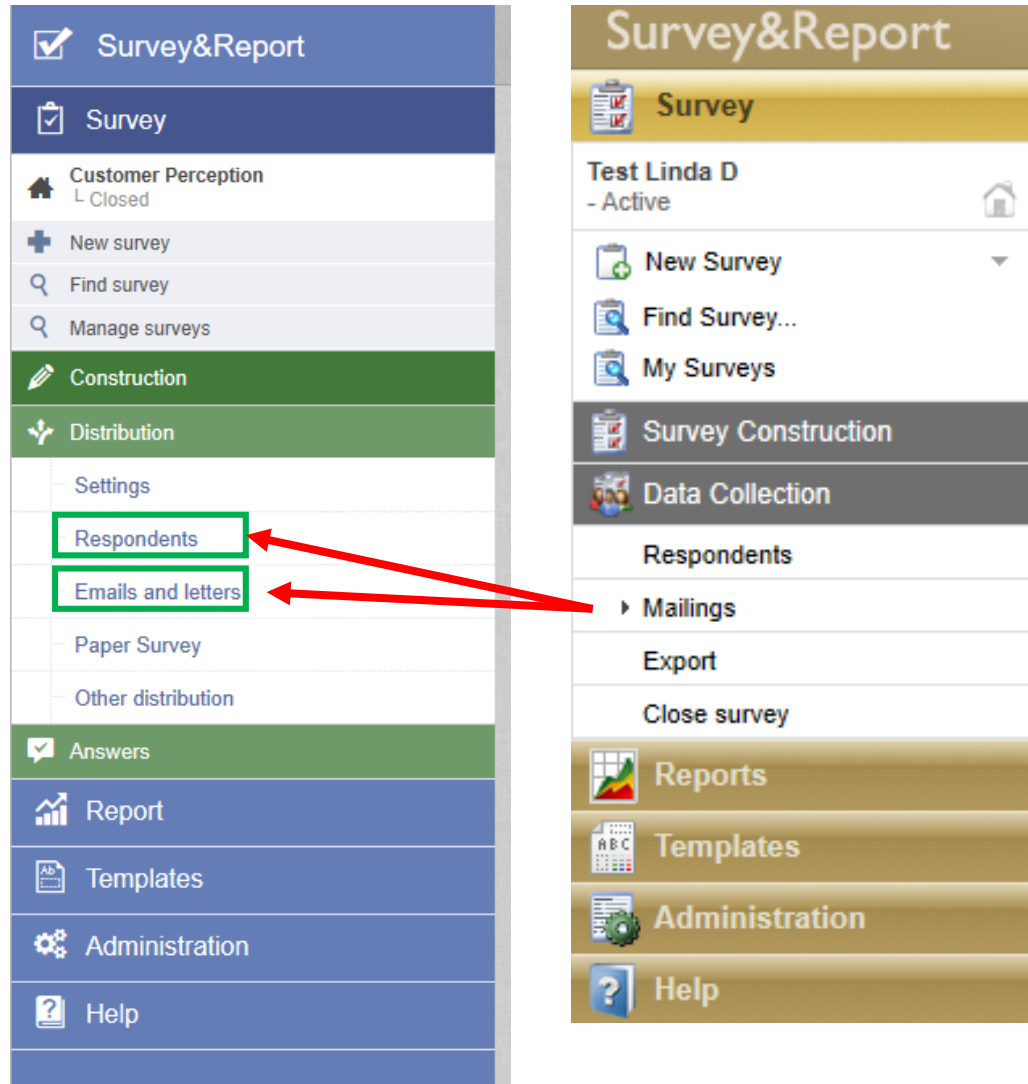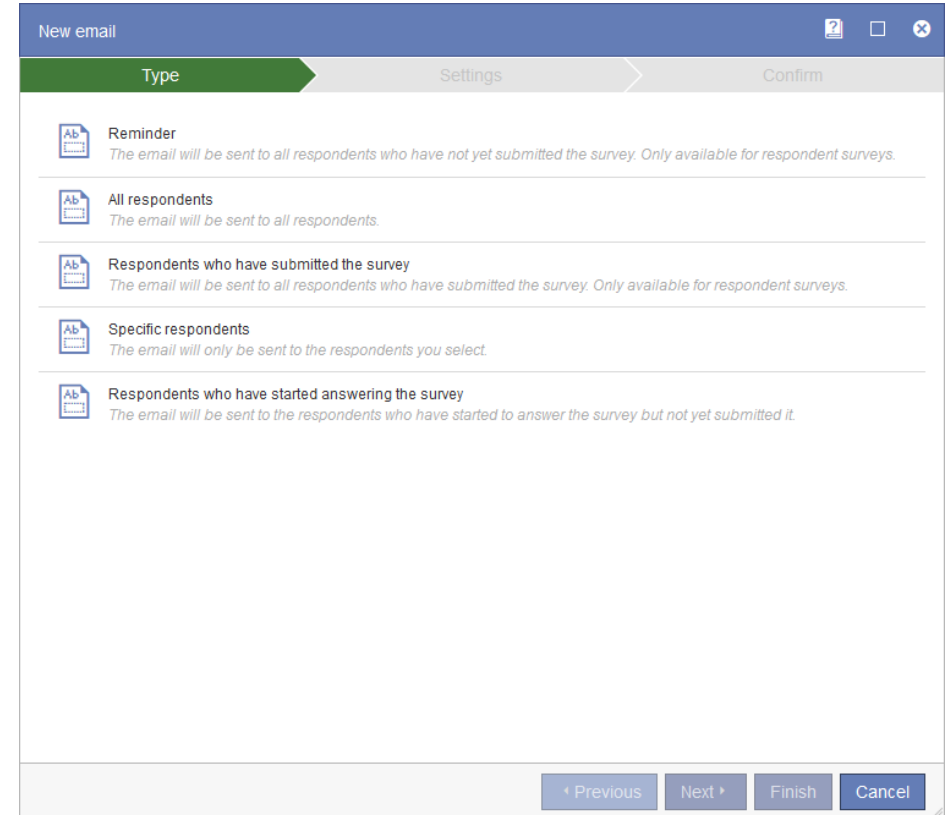
The category *Data collection* no longer exists in the new version. *Mailings* can now instead be found under *Survey > Distribution > Emails and letters*.

Respondents are now found under *Distribution > Respondents*.

Emails

Click the 📅 button to select an email schedule that you have prepared in the *Administration* or click *New email* ✚ to create a single new email for your survey.

Other distribution

These 4 new distribution options can be found in the new version of Survey&Report:

Embed your first survey page with **HTML code** on your website.

Embed the survey as a **frame** or an **external resource**.

A **pop-up window** appears when the web page loads, asking if the visitor wants to participate in the survey.

A **QR code** is generated that the respondents can scan with their phones in order to fill out the survey.

When a survey has been submitted
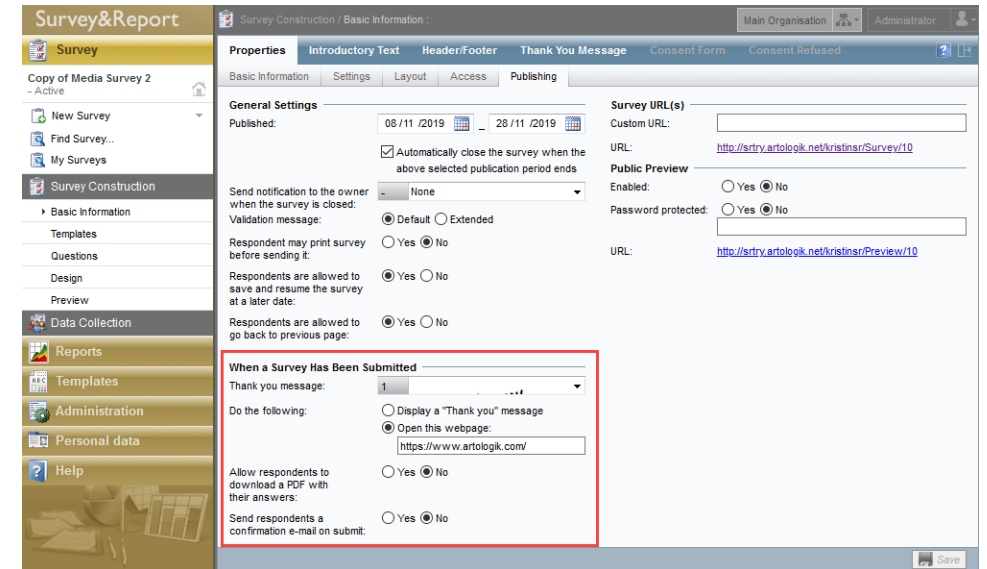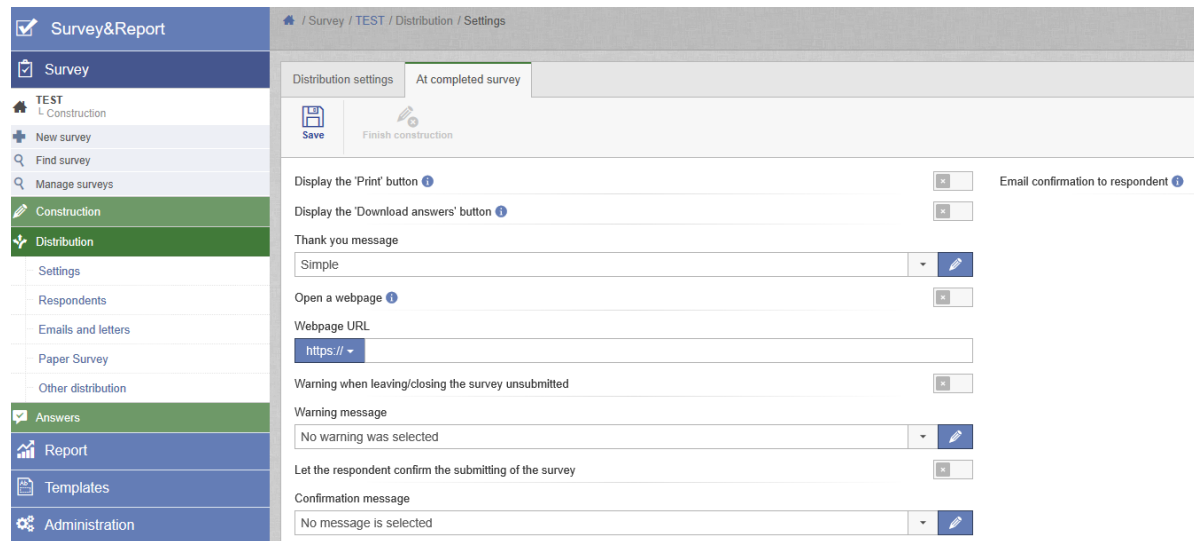
Except for *Survey type* (now under *Survey* > *Distribution* > *Settings*), all the information from the old *Basic Information* page exist on the new *Settings* page under Survey Construction.

Show answers

The tab *Show answers* is new, and can now be found under *Survey* > *Construction* > *Answers*.

Here you have, depending on your settings and the survey type, the possibility to see submitted, as well as unsubmitted surveys.

Click the [icon] button on the answer row to see the answers and [icon] to export the answers for this specific respondent.

Handle text answers

In the new version, the equivalent to *Text answers* is called *Handle text answers* and can be found in the *Answers* section under *Survey*.

The text questions are now listed directly on the page with an additional section for the answers that opens when you click the question.

→ A new tab opens where you can view the answers.

→ A pop-up window opens, showing the original text at the top and the edited text at the bottom.

→ Verify the text answer.

Publishing

All the information from the old *Publishing* tab can now be found on the *Distribution settings* tab under *Survey > Distribution > Settings.*
Exceptions are *Respondents may print survey before sending it* and the section *When a survey has been submitted,* now under the tab *At completed survey*.

Reports and subreports

Create new report

To create a new report, go to *Report* > *New report* and click *Create new standard report.* After that, you will be able to select the survey that the report should be based on.

Another option is to go to the dashboard of the survey that the report should be based on and click *Create report*.

Lastly, you will be able to enter basic information of the report.

Reports

The results can now be arranged under *Report* > *Construction* > *Content*. It is now also possible to edit the *header* and *footer* directly in the report.

Data set, Arrange questions, Add footer/header

Data set, Arrange questions (Report Content) and add footer/header (Basic Information) have all been moved into *Content* under *Report* > *Construction*.

Exporting reports

Survey&Report

☑ Survey&Report

☑ Survey

📊 Report

🏠 test

➕ New report

🔍 Find report

✏️ Construction

✧ Distribution

▸ Export

Main report

Subreports

🏠 / Report / test / Distribution / Export

Export with auto layout

Export the report to PDF, Word or PowerPoint and let the program decide the layout.

📄 PDF

📄 Word

📄 PowerPoint

Export dataset

📄 New DATA Set

Survey&Report

📋 Survey

📊 Reports

Report

📋 New Report

📋 Find Report...

Basic Information

Data Set

Report Content

Preview

Layout

▸ Export

Distribution and Subreports
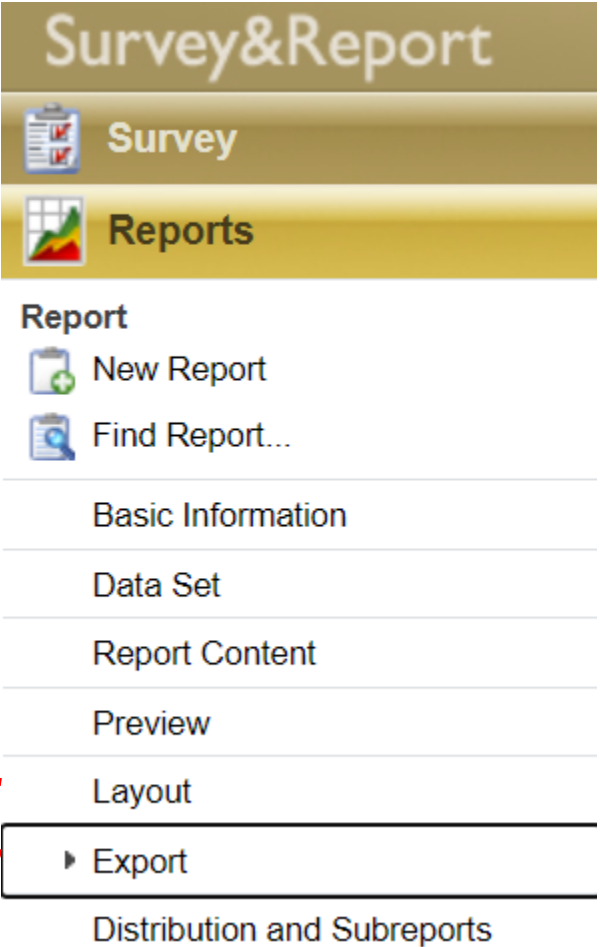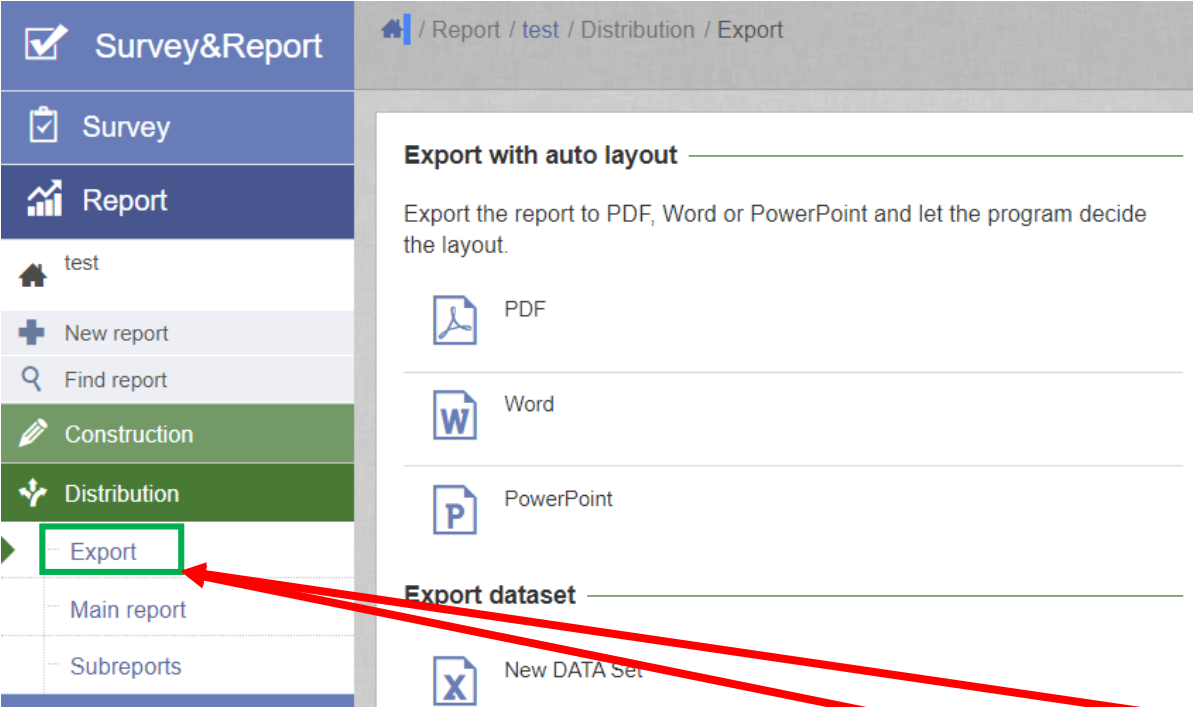
Functionality from *Layout* and *Export* is now found under *Report* > *Distribution* > *Export*. You can export the report to PDF, Word, PowerPoint or Excel.

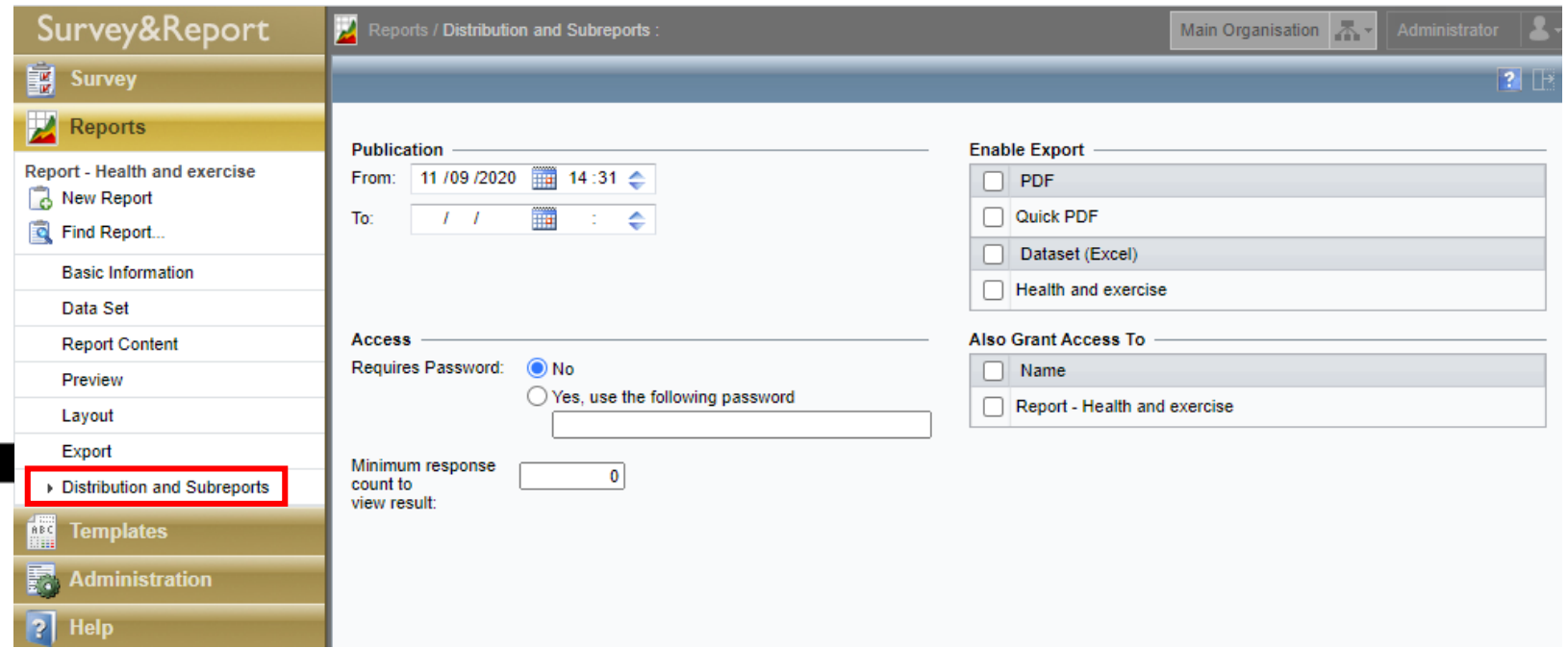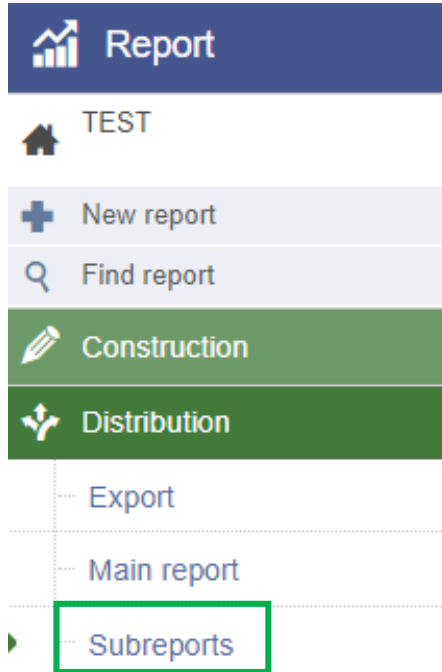# Main report

The *Distribution settings* 🖼️ from the tab *Distribution and Subreports* from version 4 are now located under *Report* > *Distribution* > *Main report*. *Subreports* are now found under *Report* > *Distribution* > *Subreports*.

Compared to the old version, *Enable exports* contains more export options :
- PDF
- Word
- Powerpoint
- Implemented template in Excel

Subreports

Subreports, previously under *Distribution and Subreports,* can now be found under *Reports* > *Distribution* > *Subreports*.

To create a subreport, click the Plus button.

Subreports - Settings

In the new version, we have simpified the subreports settings window and divided it into 3 tabs:
- *Settings*
- *Selections*
- *Report viewers*

In version 4, these settings were found altogether in the same space by pressing the *Distribution Settings* button under *Distribution and Subreports*.

Administration

Administration

You now have an overview of all the different sections and settings when you click *Administration*.

Administration menu