



# Survey&Report

**i** Version 5.0 – New features



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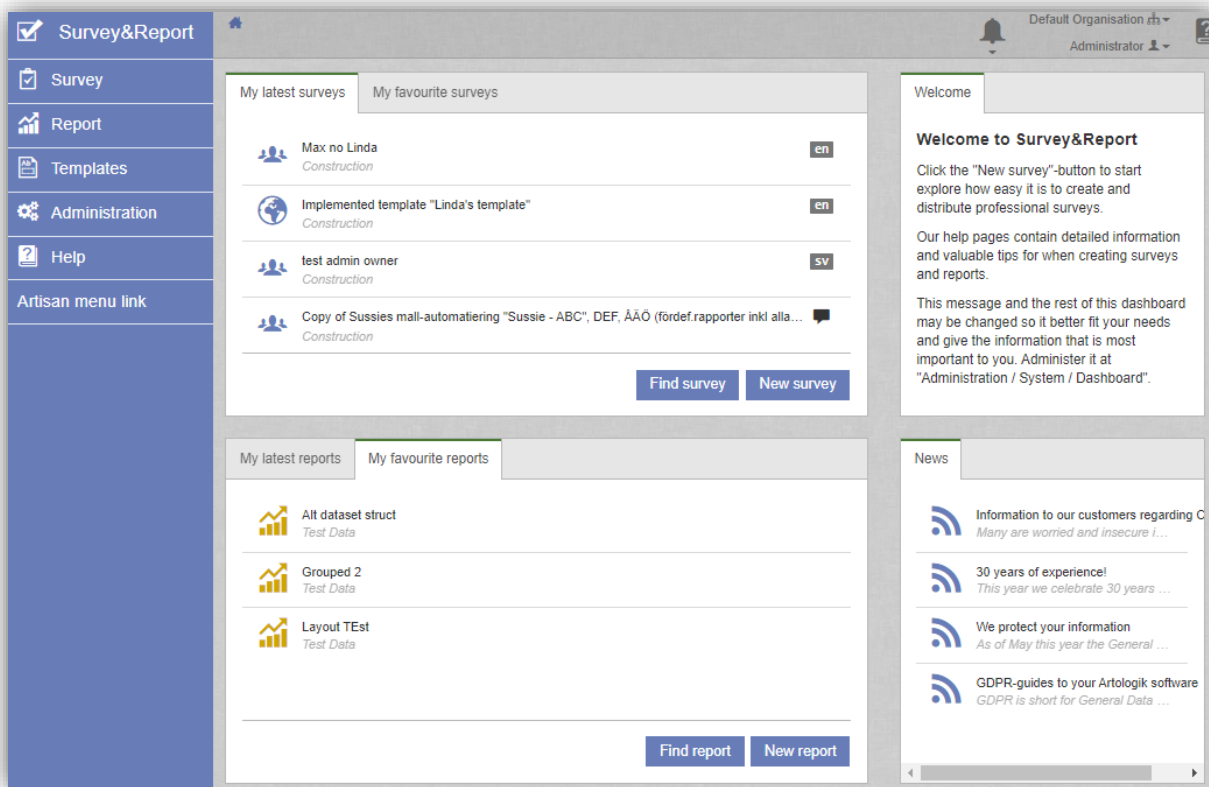
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## General

### New layout

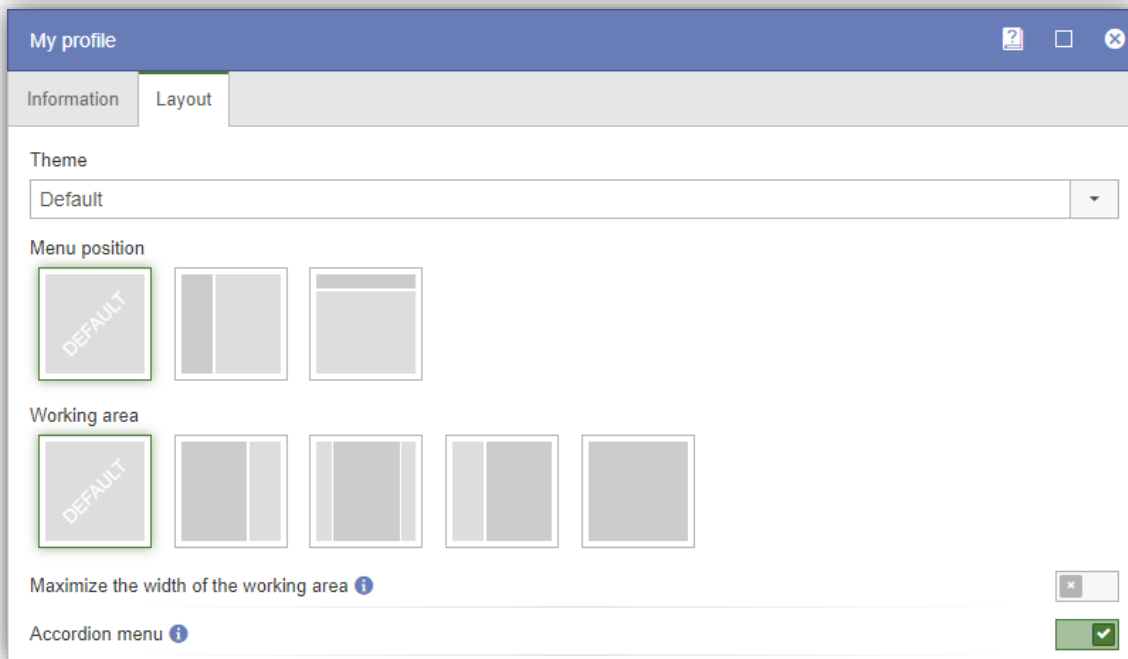
In this version, we have given the application a modern look with new colours, icons and buttons.



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 laptop, 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)

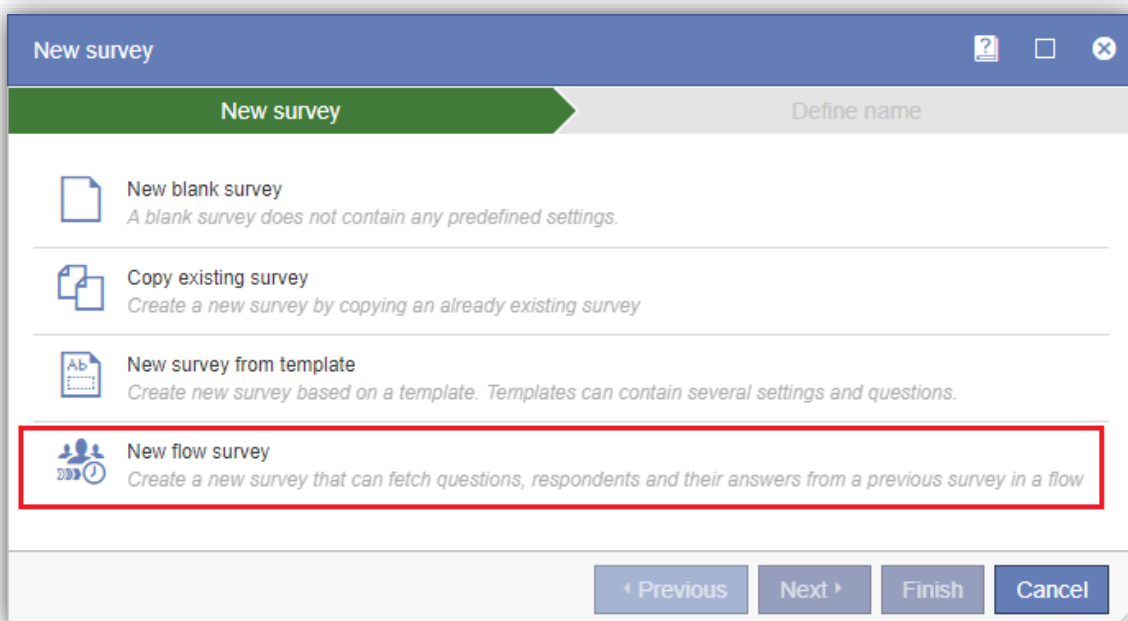


Under *Administration > System > Settings*, system administrators can specify a default setting for menu position and working area which will be applied for new users.

### New plugin - SR-Flow

In this version, we introduce the new plugin SR-Flow. You can use the plugin if you are doing a series of surveys with recurring respondents and questions and want respondents' answers from a previous survey in the flow to appear or be pre-filled on the current survey.

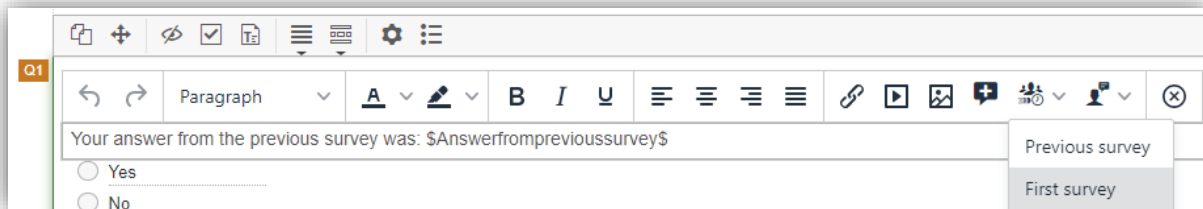
The survey flow starts with a standard non-anonymous respondent survey (all surveys in the flow must be of this type). You then select *New flow survey* under *New survey* to open a wizard where you create the next survey in the flow.



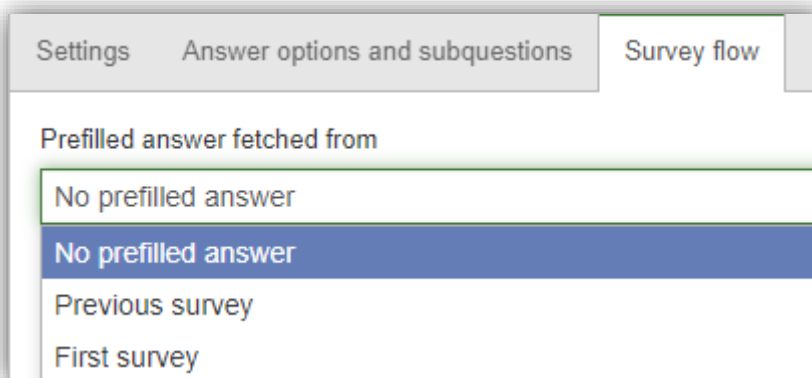
In the first step of the wizard, you select the *Previous survey in the flow*. In the second step, you choose which questions from this survey to import into the new survey.

When you finish creating the flow survey, all respondents from the previous survey are automatically added to the new one.

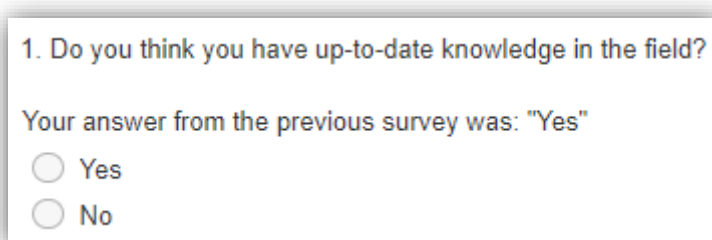
If necessary, you can add new questions to the survey. For questions taken from a previous survey in the flow, you can display the respondent's previous answer with the question, for example, in the question title or a design element. In the example below, we tag the answer from the "Previous survey" in a design element.



Under the *Survey flow* tab in the question editor, you can, if you wish, choose to have the answer from a previous survey pre-filled when the respondent answers the survey.



In our example, when a respondent answers the survey, the answer to the previous survey is displayed next to the question.



## New Plugin – SR-LTI

SR-Flow is not the only plugin that becomes available with this release. Our LTI plugin for LMS-System is also part of the release.

LMS roles that are allowed to create surveys	
Teacher	<input checked="" type="checkbox"/>
Teacher Assistant	<input type="checkbox"/>
Designer	<input type="checkbox"/>
Observer	<input type="checkbox"/>

SR-LTI allows you to connect the survey tool to your learning platforms, such as Canvas, Moodle or Blackboard. Teachers can create anonymous surveys such as course or subject evaluations for their classes with just a few clicks. Students respond directly inside your LMS tool and can also receive email invitations and reminders from the survey tool.

You can create reports automatically and display those to teachers and students on the learning platform. Set up rules to only allow the use of predefined templates, or let your teachers be creative and design their surveys - you choose.

## 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 (Time-based 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 App 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.

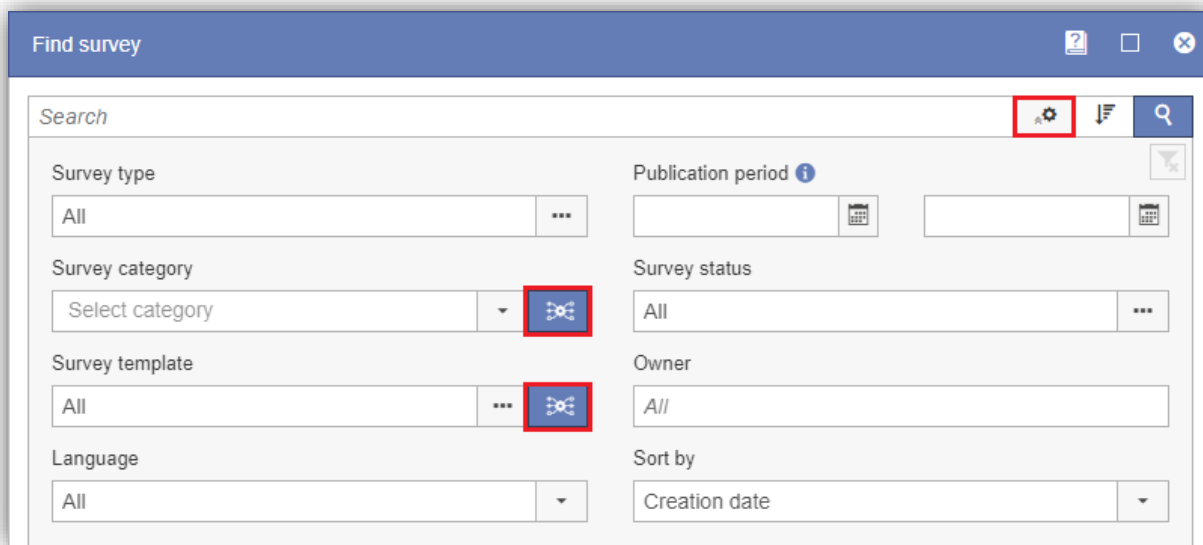
## New icon for anonymous survey

We have replaced the icon symbolising anonymous surveys. We now use the following icons:

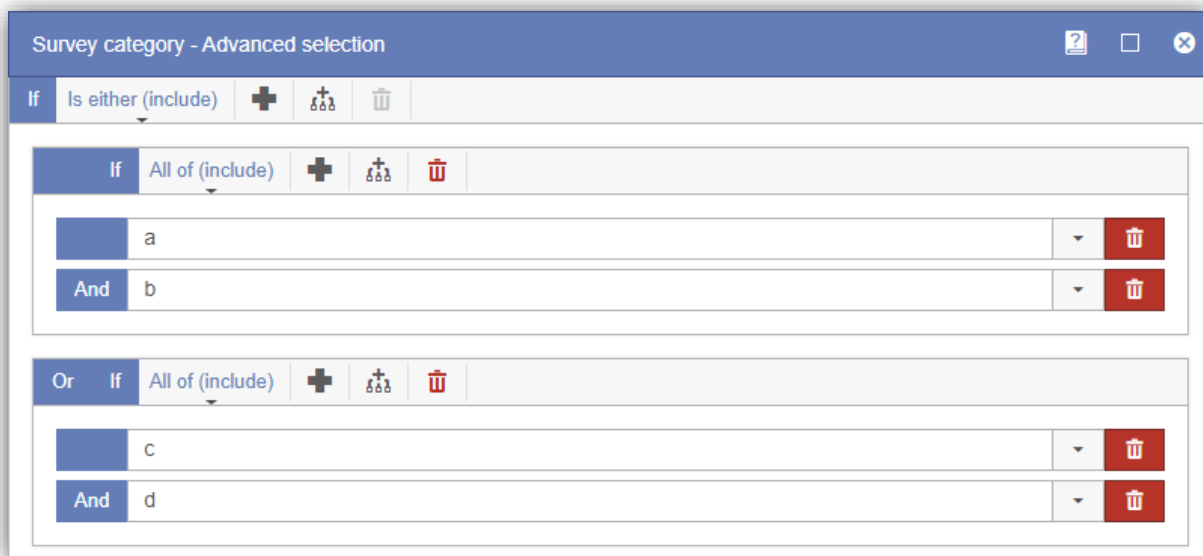


## Advanced selection for survey categories and templates

When searching for a survey using *Find Survey* (or under *Manage Surveys*), you can now make more advanced selections when filtering by *Survey Category* and *Survey Template*. Click on the  button next to each selection box to access the new interface.



In the window that opens, you can create an expression with conditions and groups of conditions to describe the filtering you want to do. In the example below, a search is done for surveys belonging to survey category *a* AND *b*, OR survey category *c* AND *d*.



### Improvements concerning PDF accessibility

We have made improvements concerning the accessibility of the PDF exports, for example the export of reports, which can be made from the program.

## Survey dashboard

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### 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.

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## Survey construction

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### 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 be 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.

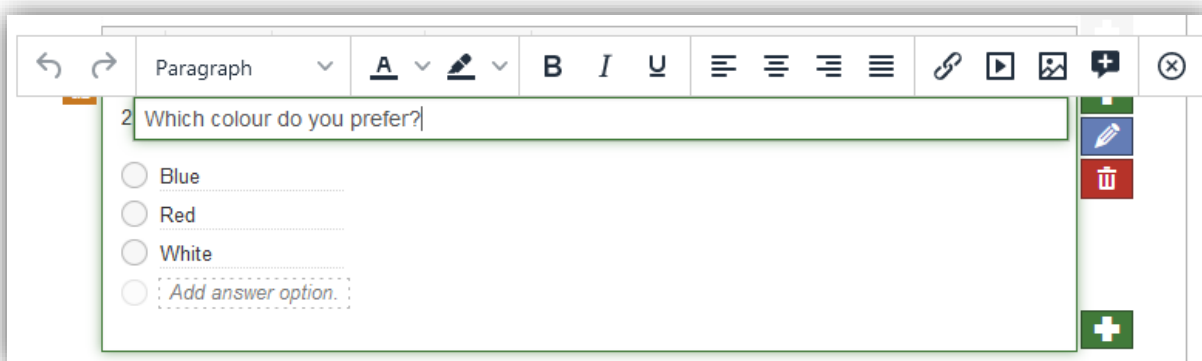
### New interface for editing all survey content

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

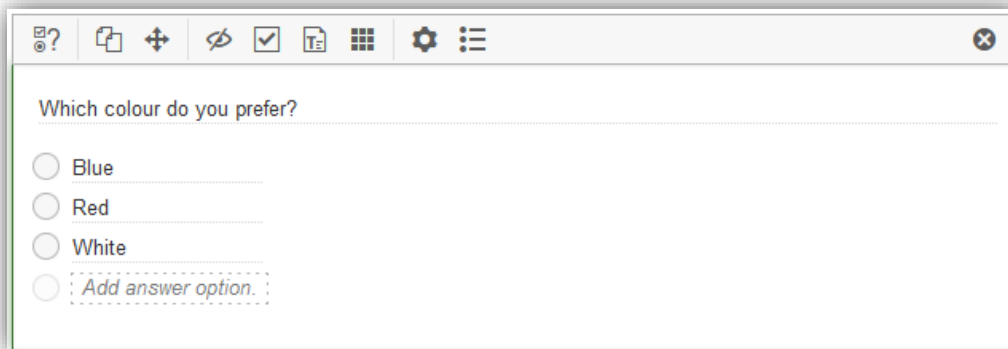
When you click somewhere else in the question's box (not on a text), a toolbar opens containing e.g. icons, with which you can activate some common question settings:

- 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*.

**Q1**

1. In which country do you live?

France

Germany

Spain

Sweden

Question 1 (administration)

2. Do you enjoy living in \$Q1\$

Question 2 (administration)

1. In which country do you live?

France

Germany

Spain

Sweden

Question 1 (survey)

2. Do you enjoy living in Germany

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.

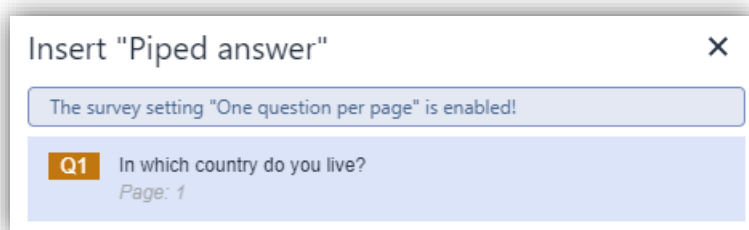
We recommend that the "source question" is made mandatory, to make sure that there is an answer to insert in the "target question".

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

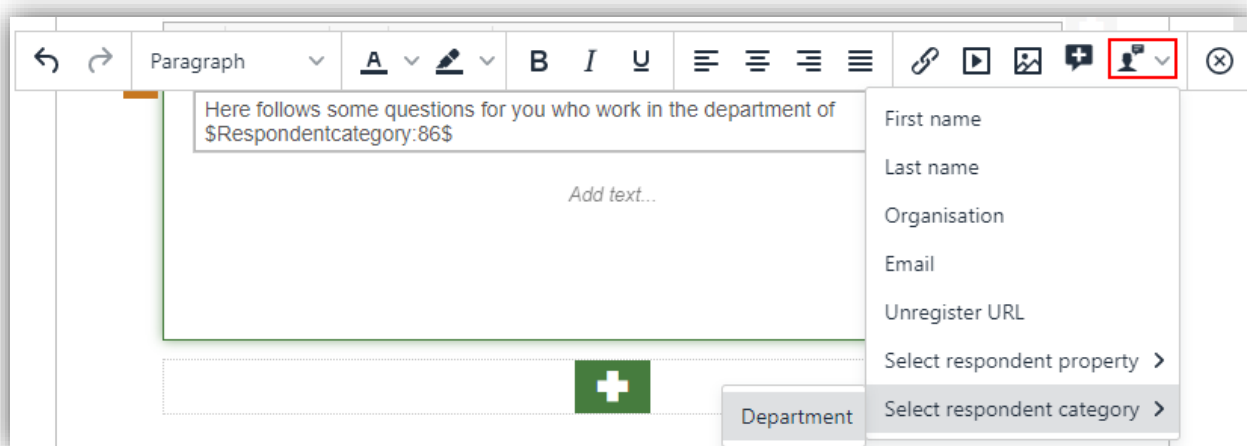
In the “target question”, you insert a “tag” with the ID of the “source question”, for example \$Q1\$.

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.



### Insert respondent info in questions

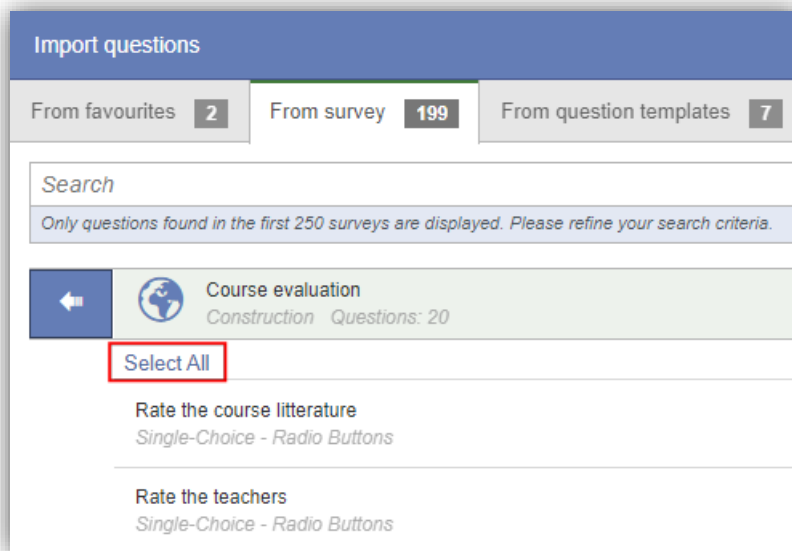
A function similar to the *Piping* function is the possibility to insert respondent info in questions. The information that can be inserted is *First name*, *Last name*, *Organisation*, *Email* and *Unregister URL*, as well as respondent properties and the respondent categories that are linked to the current survey.



The button for inserting respondent info (highlighted in the image above) can be found in the formatting toolbar for inline editing of question titles, sub questions in matrices, answer options and design elements.

## Import questions from survey - select all questions

In the survey construction, you can import questions from other surveys in the system. After selecting a survey, you can select questions to import one by one, but if you want to import all questions from the survey you can now click *Select all*.



## 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 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*:

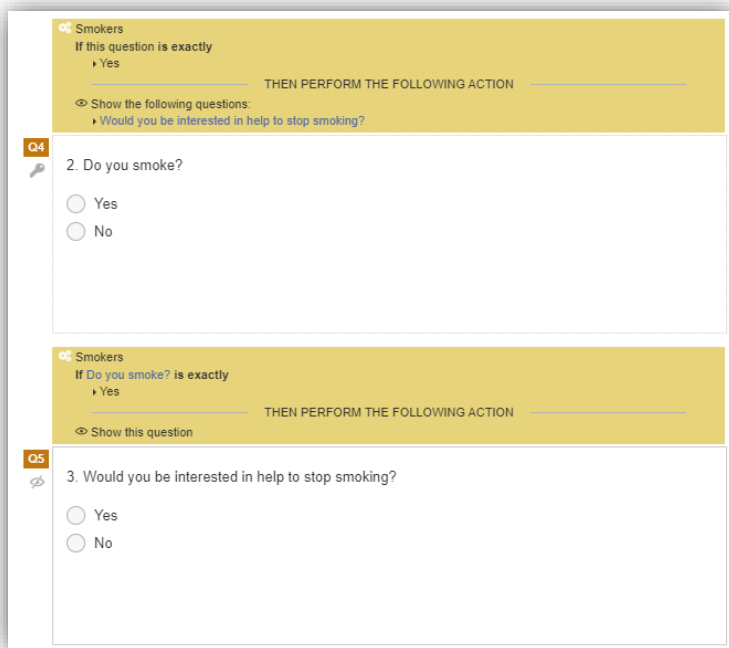
- *Authorised users may submit new answers*: If this setting is enabled, users that you have added as authorised users are allowed to submit new answers to your survey.
- *Authorised users may see answers*: By enabling this setting, you allow your authorised users to see the answers for this survey.

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.

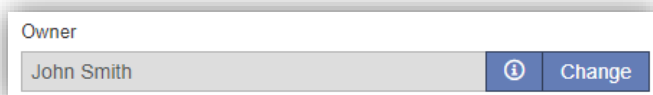
If the survey contains logics, the condition and action of each logic will be displayed above the questions involved.



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.

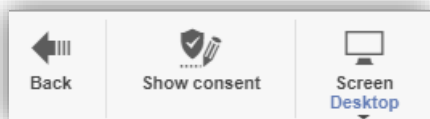
You find the *Reopen construction* button on the top of the page in the *Distribution > Settings* menu, and also among the shortcuts under *Actions* on the survey dashboard page.

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.

## Show/hide consent in the preview

Under *Administration > Personal data > Consent settings*, you can activate the possibility to ask for the consent of the respondents answering the survey. For surveys where consent is activated, it is now possible to select under *Survey > Construction > Preview* whether the consent form should be displayed when previewing the survey, or not. Use the *Show consent* button to show/hide the consent.

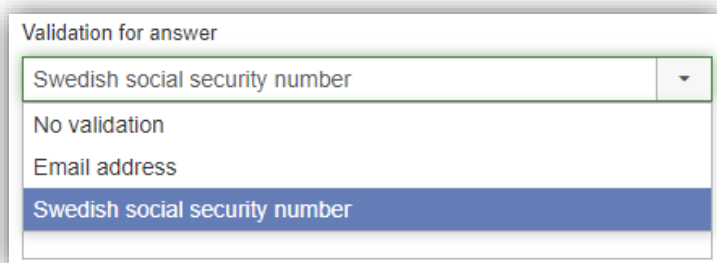


Under *Administration > Surveys > Settings*, you decide whether the consent should be displayed by default when previewing the survey for the first time during a browser session. During the current session, the program will remember what you chose the last time on the survey, to show the consent or not.

Consent is shown as default in preview

## Validation of Swedish social security number

You can now activate a validation on questions of the type *Text field* so that the respondent must enter a valid Swedish social security number.



In order to be able to activate the setting at question level, you must first activate it at system level under *Administration > Surveys > Settings > General settings*.

Validation of Swedish social security number

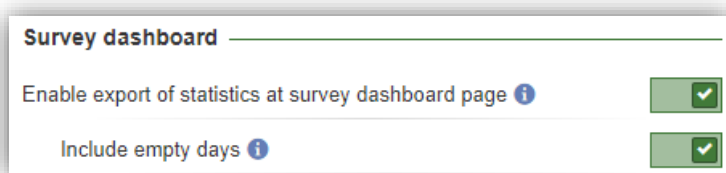
Note that if the setting has been activated on a survey question and you then inactivate the system setting, no validation will be made on the survey.

## Export answer statistics

On the survey's dashboard, you find the *Statistics* section, where you can see submitted answers, unsubmitted answers and response rate per day in a chart. You can now choose to export the corresponding information to Excel via the *Export Statistics* button.

In order to make this export possible, you must first activate this system setting:

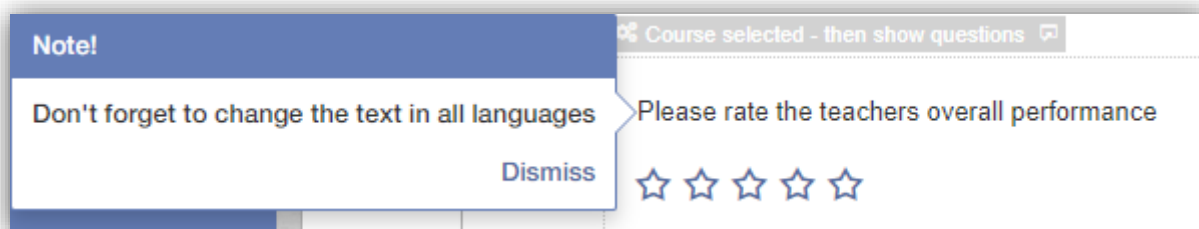




The setting *Include empty days* determines whether days without any submitted or unsubmitted answers should be displayed as rows in the Excel file.

### Notification when text changes in multilingual survey

In a multilingual survey, if you change the wording of a question or an answer option, you will now receive a notification to remember to change the text in the other languages of the survey.



## Survey distribution

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### Import answers

Have you conducted a survey in another system and want to import the respondents and their answers into Survey&Report? This import type is now possible via the *Import Responses* function found under the *Responses* menu.

In the same way as when importing respondents, you prepare a file with columns for the desired respondent data, but here you also make sure that there are columns corresponding to the survey questions. The import is done via a wizard where you match respondent information and questions to the columns in the file in two different steps. Once you have completed the import, you choose to submit or save the responses.

Please note that the import of responses is only possible on non-anonymous respondent surveys.

### Publication date not mandatory at survey publication

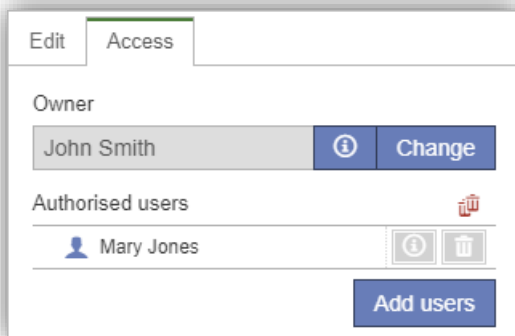
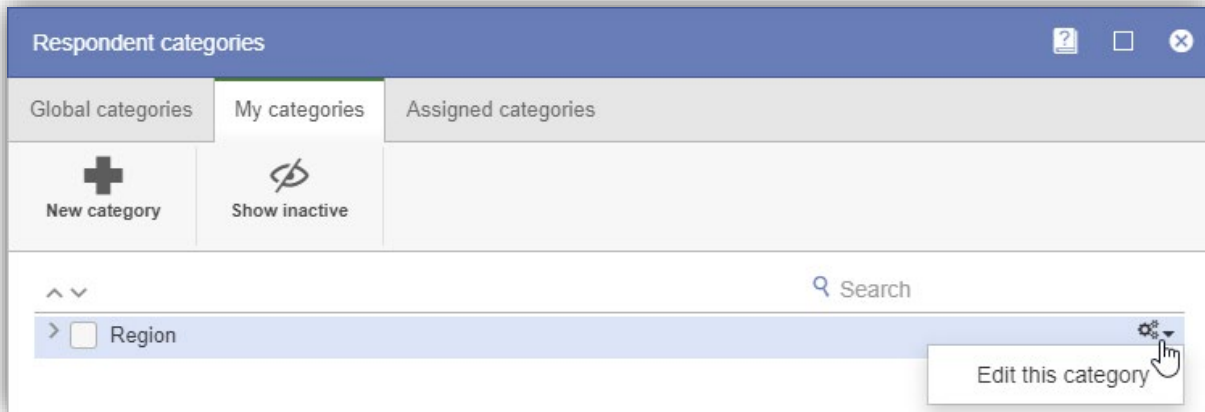
In version 4, it was mandatory to specify both start date and end date when finishing the survey construction. You can now finish the construction without entering neither start nor end date, and instead decide this later on. For respondents to be able to answer the survey, a start date must of course 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:

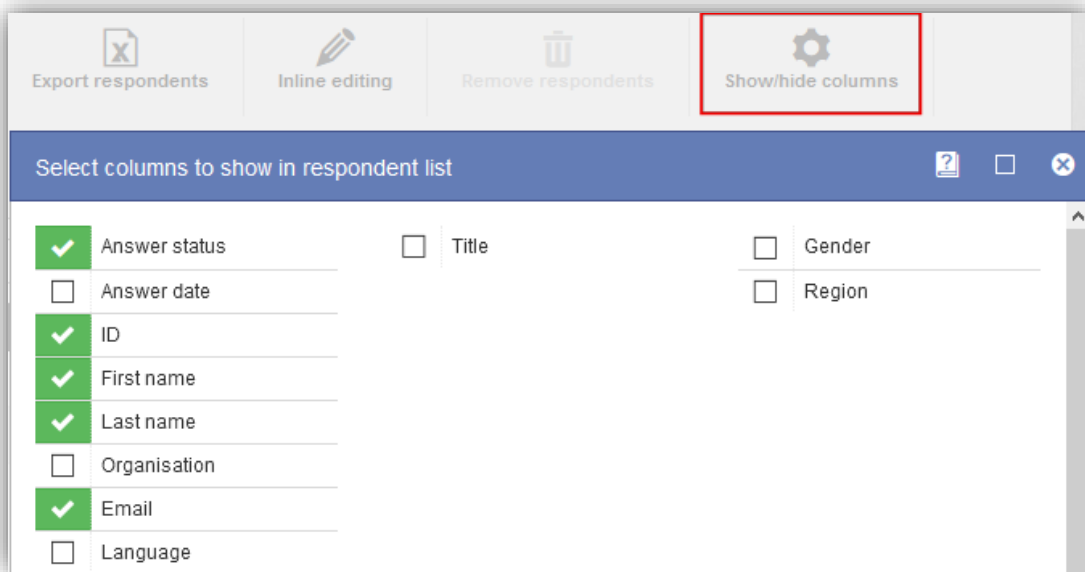
- *Global categories* - categories which all users can use on their surveys. These categories can be created and edited by users who have access to the page *Administration > Respondents > Global respondent categories*.
- *My categories* - categories the logged in user is the owner of. The user can edit 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 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, make sure a message is selected in the drop-down list below *Confirmation message before submit*. If no message is available in the drop-down list, you create a new one by clicking the  button to the right. Write your message and save. You can edit an existing message by clicking the  button.

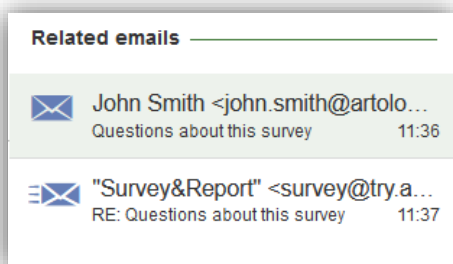
### Import of respondents – only in Excel format

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. You can also specify a period when the embedded survey is shown on the website.
- *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 (100 % by default), a period when the pop-up is shown on the website, and after how many seconds the pop-up is displayed.
- *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

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### 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  to view the answer, or  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

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### 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. 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.

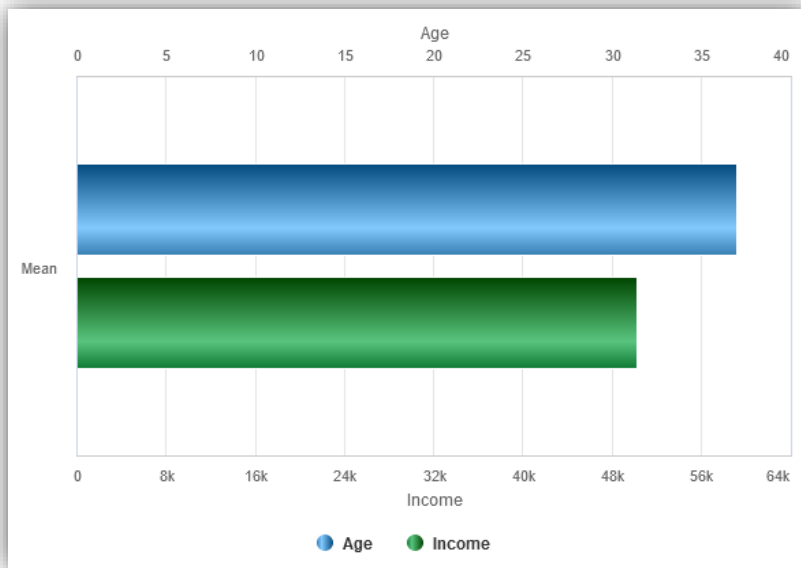
For aggregated report, enter a name and select theme to create the report, then continue configuration via the menu.

## New chart engine

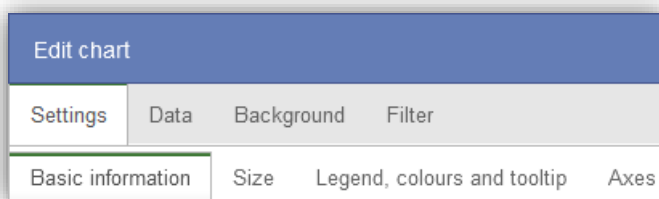
A new chart engine is used in the new version, which brings a more modern appearance to charts. Charts are now responsive; meaning that their size adapts to the size of the browser window. If a chart has automatic scale, the scale can be adjusted when you change of the size of your window.

## New charts and new interface for chart editing

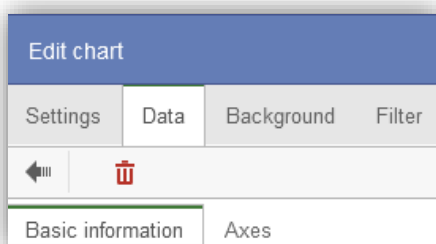
The charts have been exchanged. In the interface for editing charts, it is now possible to make individual settings for each series. You can, for example, choose to present two series with separate scales.



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. 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.

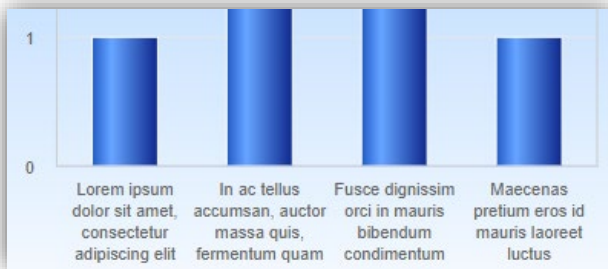


## New settings for editing charts

Several settings have been added when editing charts.

### Word wrap for labels

If you prefer to use chart types that have vertical bars, you may have noticed that long texts in the answer options are sometimes shortened. You can now avoid this by activating the *Word wrap for labels* setting under *Settings > Axes* in chart editing. The texts of the answer options will then be displayed in full, divided into several lines.



### Input fields instead of sliders

Under *Settings > Size* in the chart editor, the settings for the distance around the chart are now made via input fields, allowing you to set a higher value than before. If you use the *Word wrap for labels* option described above, you may need to increase the spacing at the bottom to accommodate them.

Spacing top		
-	40	+
Spacing right		
-	20	+
Spacing bottom		
-	20	+
Spacing left		
-	20	+

### HTML-formatting

Sometimes HTML formatting in the texts of questions and answer options can have undesirable effects in, for example, the description of diagrams. Therefore, we have added the *Apply HTML formatting* setting under *Settings > Basic information* in the chart editor. The setting is disabled by default but can be enabled if needed.

Several other new settings have also 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)

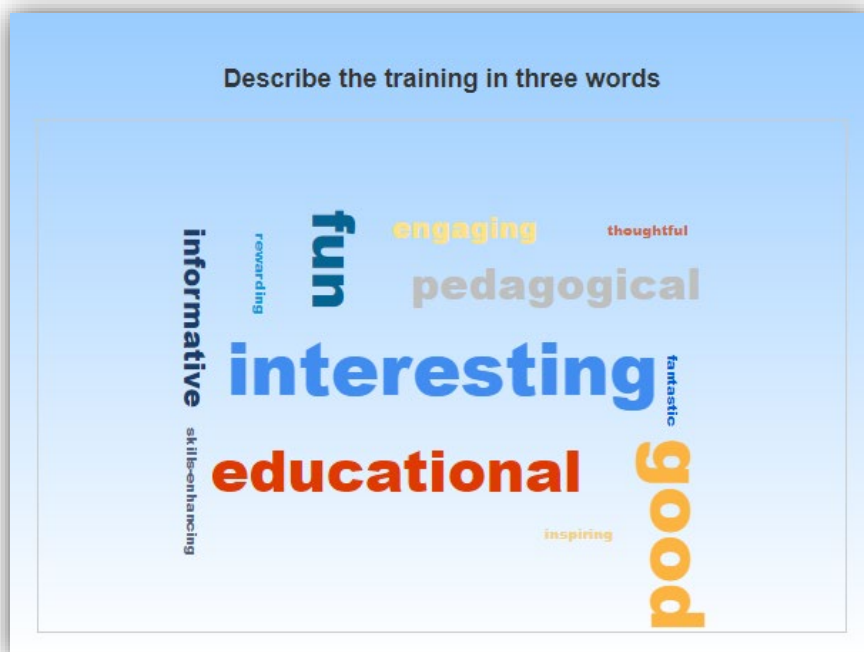
- Data type: *Statistical* (not only *Mean*, but also *Standard deviation*, *Coefficient of variation*, *Minimum*, *Lower quartile*, *Median*, *Upper quartile* and *Maximum* can be presented), *Word count*
- *Exclude "I don't know" options* (Applies to answer options defined as *I don't know* options 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* and *Frequency*.)
- *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* and *Frequency*.)
- 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)*, *Box Plot* and *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.

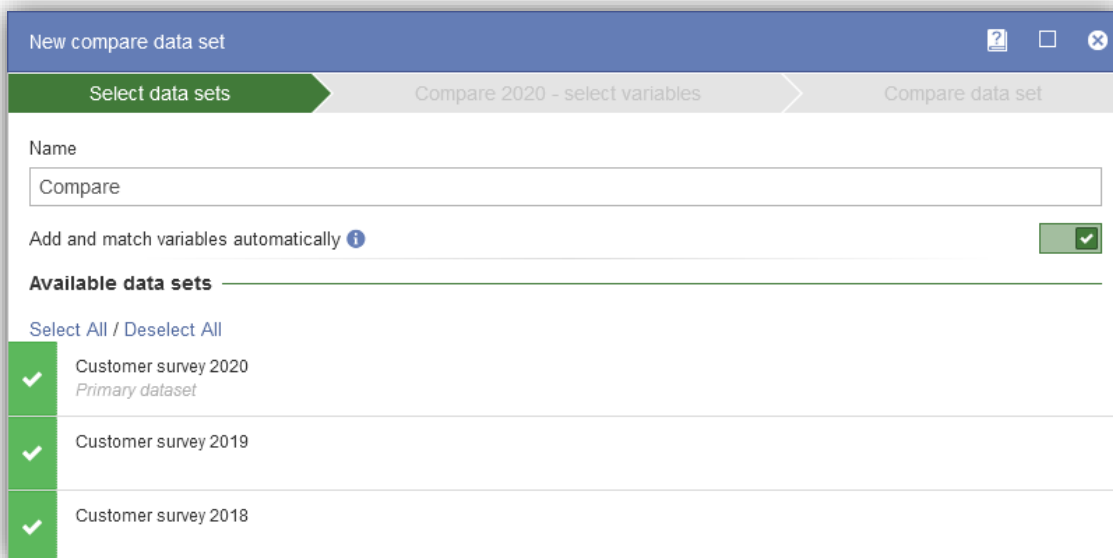




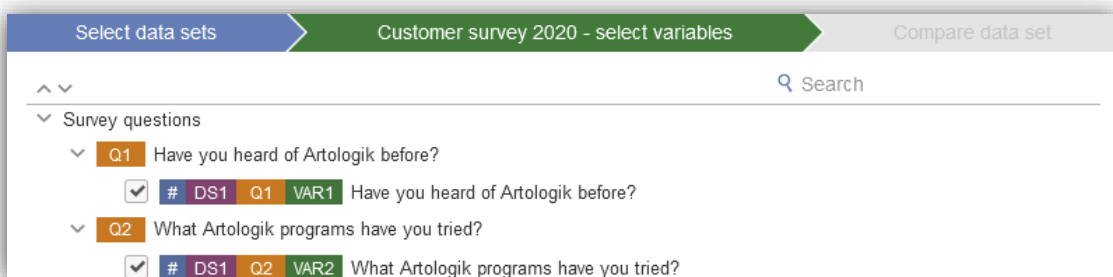
## Wizard for creating Compare reports

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.

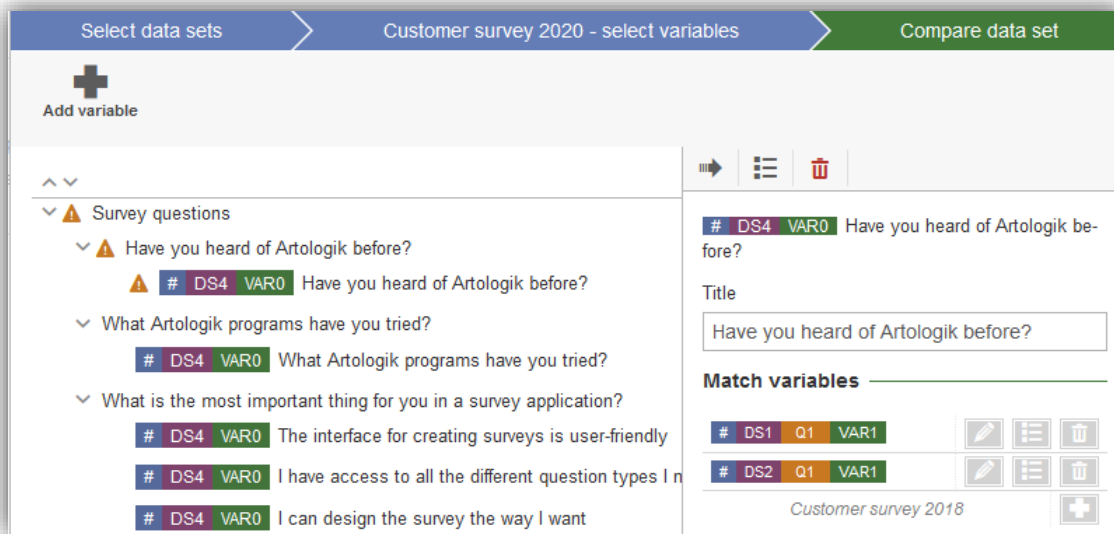


In the second step, you select the variables you want to include in the comparison, from the primary data set.



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:



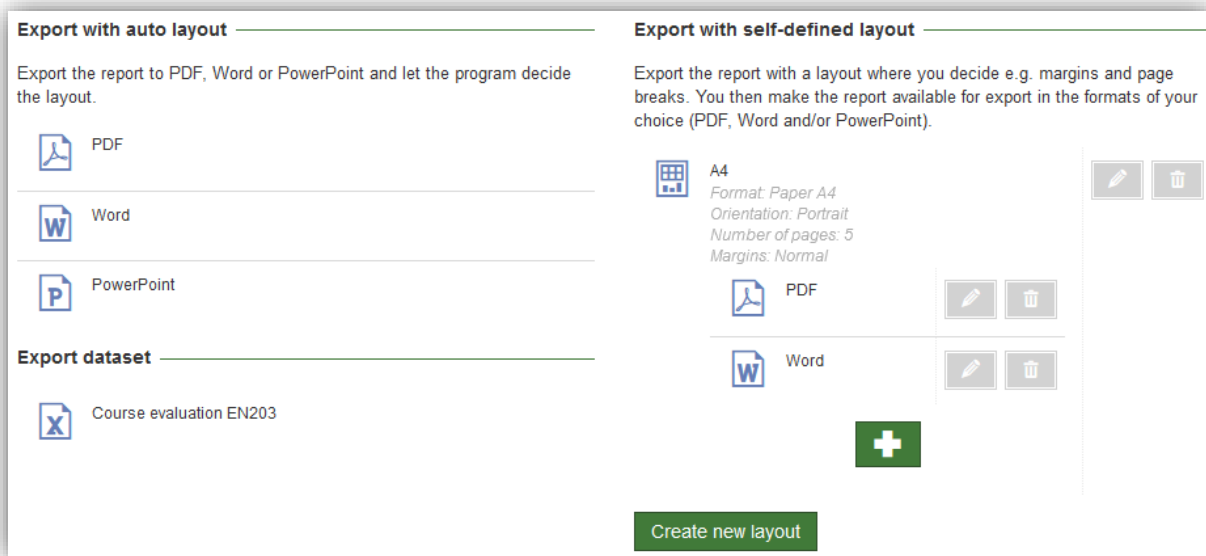
The report is now divided into different pages and can be viewed under *Report > Construction > Preview* or via a link that can be found in the report *dashboard*.

## 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*.

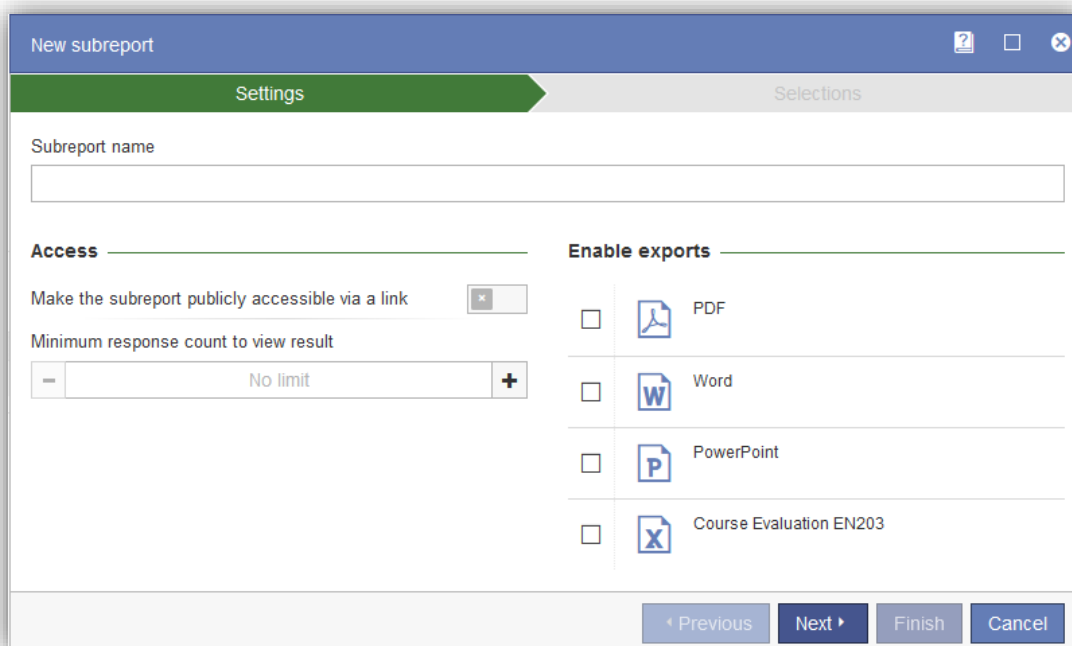
If you are not satisfied with the automatic layout decided by the program, you can instead create your own layout where you for example create your own page breaks. Under *Export with self-defined layout*, you click the *Create new layout* button to go to the page where you edit the new layout. When 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.




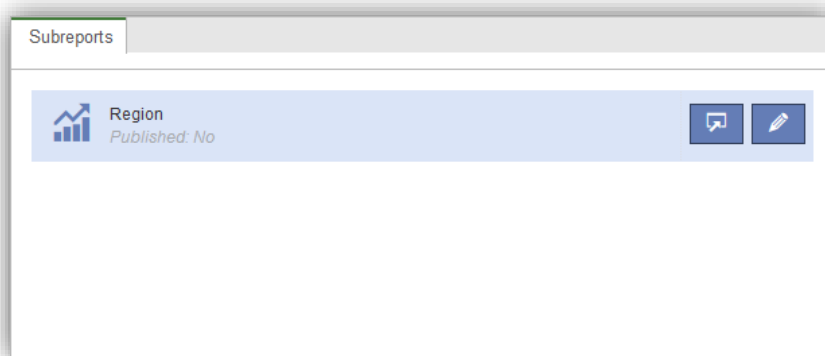
## Wizard for creating subreports

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*.



## Survey template data set

If you have the plug-in *SR-Advanced Report*, it is now possible to use a so-called survey template data set in reports on surveys created from a survey template. This data set can be used to compare a current survey to other surveys created from the same survey template. In that way, you can for example create a report where you compare the evaluation of a course with all courses the previous semester, or the result of this month's employee survey with the results from the whole year.

A survey template data set can be added in a predefined report, connected to the survey template, and it will then be automatically included in reports generated from the predefined report, but it can also be added to an individual report.

When the survey template data set is created, you decide which surveys (created from the survey template) to be included in the survey template data set. You can let all surveys be included, or specify criteria which the surveys must meet to be included. The following criteria can be specified:

- *Surveys* - select individual surveys to include or exclude
- *Survey categories* - select survey categories to include or exclude
- *Published* - select surveys which were published during a specified period
- *Answers* - include only answers given during a specified period (please note that on anonymous surveys, no answer date is saved for anonymity reasons, and therefore this criterion cannot be used on anonymous surveys)

In addition, you can on the survey template (under *Construction > Settings*) make a setting concerning which surveys from the survey template data set the user viewing the report shall see the result from:

- *All*
- *Surveys the report owner has access to*
- *Surveys the current user has access to*

In the group rights, under *Administration > Groups > [Select group to edit] > Rights > Reports*, you find the right *Survey template data set* which you can set to *Use* or to *Edit*. This applies to both predefined reports and individual reports.

- *Use*: The survey template data set is available in the report under *Report > Data set*, and it is also possible to insert variables from the survey template data set under *Report > Content*.
- *Edit*: In addition to the right to use the survey template data set (see above), users with this right will also be able to create new survey template data sets and edit existing ones. Thus, they can decide which surveys to be included in the survey template data set.

## Hybrid elements - new functionality

It is now possible to insert hybrid elements in predefined reports, and thus to include them in reports generated from predefined reports.

In columns of the types *Table* and *Chart*, we have added the possibility to present the following data:

- *Min*
- *Lower quartile*
- *Median*
- *Upper quartile*
- *Max*
- *Mean (CI 90)*
- *Mean (CI 95)*
- *Mean (CI 99)*

A new column type is now available in the hybrid element - *Column difference*. You can use this column type to present the difference between two columns, for example the mean value from the current survey compared to the mean value for the same question in other surveys based on the same survey template (see the description of the new feature *Survey template data set* above).

	This survey	All surveys previous semester	Difference
Total evaluation of the course	3.58	3.47	0.11

In the column settings, you specify which columns shall be used when calculating the difference.

Column 1 (for calculation of column difference)

This survey ▼

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Column 2 (for calculation of column difference)

All surveys previous semester ▼

Please note that the difference is calculated using unrounded input values.

## Lock reports for editing

If you do not want users to be able to make any changes to the report content of the reports generated from a predefined report, you can activate the setting *Reports generated from this predefined report are locked for editing* under *Settings* on the predefined report.



Then, no report elements (tables, charts etc.) will be possible to edit under *Report > Construction > Content*. Neither will it be possible to regenerate the report, to add or remove report items, or to edit the report's data set.

## Templates

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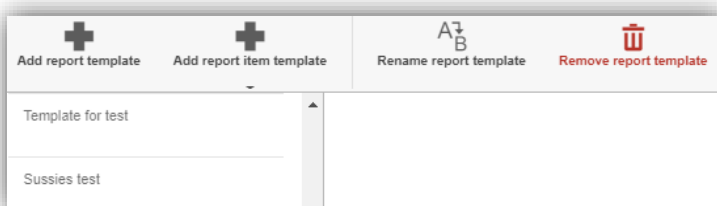
### Possible to add emails to survey templates

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).

<input type="checkbox"/>	Email type ▾	Subject ▾	Date ▾	
<input type="checkbox"/>	First email	Please answer our survey: "\$SurveyName\$"	+0 day(s) at 09:00	
<input type="checkbox"/>	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 > Report templates > 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.




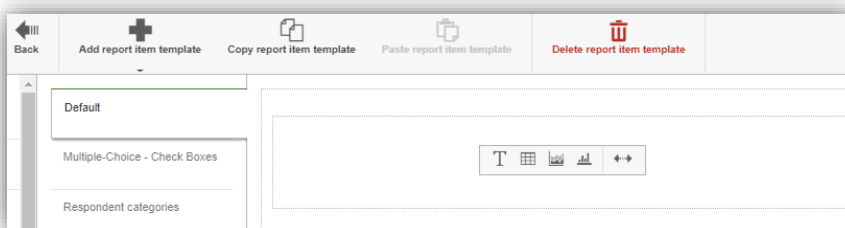
You now have an overview of already existing report templates in the list on the left side of the window. You can either edit one of these by simply clicking it, or you can create a completely new report template by clicking the *Add report template* button.

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*.

## Setting "Minimum number of responses to display results" on the survey template

**Note the difference from the previous version:**

The *Minimum response count to view result* setting is at the survey level and determines how many responses must be received before the survey results can be viewed (by creating a report or by exporting the response data).

This setting has been available on survey templates in the past. However, it has only been applied to surveys created from the survey template if the value entered on the survey template was higher than the general system setting for the survey type in question. We have now changed so that the survey template value is always applied to surveys created from the survey template, even if it is lower.

## Administration

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### 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	New “parent” right in ver. 5 for Templates, Custom texts, Header, Introduction text, Questions and Footer.
Templates	Survey construction > Templates
Custom texts	New separate right in ver. 5. Part of “Survey construction > Questions” in ver. 4
Header	New separate right in ver. 5. Part of “Survey construction > Questions” in ver. 4
Introduction text	New separate right in ver. 5. Part of “Survey construction > Questions” in ver. 4
Questions	New separate right in ver. 5. Part of “Survey construction > Questions” in ver. 4
Select survey theme at question level	
Footer	
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	
<b>Rights in ver. 5 - Surveys tab</b>	<b>Corresponding right in ver. 4</b> (blank field = no changes)
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
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
Respondent data	New separate right in ver. 5. Part of “Export data” in ver. 4
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	
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
<b>Rights in ver. 5 - Surveys tab</b>	<b>Corresponding right in ver. 4</b> (blank field = no changes)
Delete own surveys	New right in ver. 5
Delete assigned surveys	New right in ver. 5
Restore/Remove surveys from recycle bin	New right in ver. 5 for a new function
Access to surveys (heading)	New section heading
All surveys	
Assigned surveys	
Other survey settings (heading)	
View owner profile	New right in ver. 5
Activate the 'Save' button on anonymous surveys	
Unlimited numbers of respondents per survey	
Increase respondent limit up to the personal maximum, at survey level	
May allow exceeding the maximum file size	
Respondent answers (heading)	New heading
Submit new answers	New right in ver. 5
Submitted answers	New right in ver. 5
<b>Rights in ver. 5 - Reports tab</b>	<b>Corresponding right in ver. 4</b> (blank field = no changes)
Reports menu	
Construction (heading)	New heading
Settings	Basic information
Content	Report content
Regenerate report	New separate rights in ver. 5. Part of "Report content" in ver. 4
Data set	
Header	New separate rights in ver. 5. Part of "Report content" in ver. 4
Footer	New separate rights in ver. 5. Part of "Report content" in ver. 4
Distribution (heading)	New heading
Export	

Layout	
<b>Rights in ver. 5 - Reports tab</b>	<b>Corresponding right in ver. 4</b> (blank field = no changes)
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
Restore reports from recycle bin	New right in ver. 5 for a new function
Aggregate reports (heading)	New section heading
All aggregate reports	
Assigned aggregate reports	
Survey template data set	New right in ver. 5 for a new function
<b>Rights in ver. 5 - Templates tab</b>	<b>Corresponding right in ver. 4</b> (blank field = no changes)
Templates menu	
Surveys	Survey templates
Create new survey templates	New survey template
Delete survey templates	New right in ver. 5
Restore survey templates from recycle bin	New right in ver. 5 for a new function
Construction	New separate rights in ver. 5. Part of “Edit survey template” in ver. 4
Settings	
Automation settings	
Content	
Branching logic	
Design	
Question settings	

<b>Rights in ver. 5 - Templates tab</b>	<b>Corresponding right in ver. 4</b> (blank field = no changes)
Theme settings	New separate rights in ver. 5. Part of “Edit survey template” in ver. 4
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
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)

<b>Rights in ver. 5 - Administration tab</b>	<b>Corresponding right in ver. 4</b> (blank field = no changes)
Administration menu	
System (heading)	New heading
Users	
Groups	New separate right in ver. 5. Part of “Users” in ver. 4
Organisations	

Rights in ver. 5 - Administration tab	Corresponding right in ver. 4 (blank field = no changes)
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
Automation	New right in ver. 5 for a new function
License	New right in ver. 5 for a new page
LDAP	
Surveys (heading)	New heading
Question types	New separate right in ver. 5. Part of “Administration > Settings” in ver. 4
Global survey categories	New separate right in ver. 5. Part of “Administration > Settings” in ver. 4
User-specific survey categories	New right in ver. 5 for a new function
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
Translate help text	New separate right in ver. 5. Part of “Languages and translations” in ver. 4
Allowed file types	New right in ver. 5 for a new function
Settings	New separate right in ver. 5. Part of “Administration > Settings” in ver. 4
Paper survey	

Rights in ver. 5 - Administration tab	Corresponding right in ver. 4 (blank field = no changes)
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

## Automated removal of inactive users

If you want inactive users to be automatically deleted or inactivated, you can activate this new setting under *Administration > System > Automation*. You can define at what time of the day this shall be done, type of removal (*Inactivate*, *Inactivate and anonymise* or *Delete*) and the number of days of inactivity required to consider a user as inactive.

**Automated removal of inactive users**

Run every day at

Type of removal

Number of days of inactivity required to consider a user inactive

## 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 types of loggings and the date the last time an event has occurred. To get a more detailed view, simply click on one of the types 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.

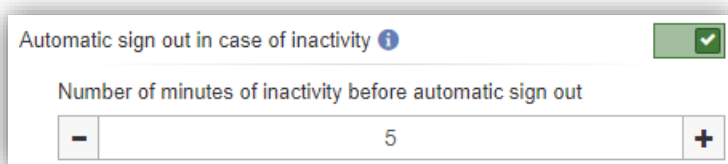
## Log in as another user - also in maintenance mode

Super administrators have the possibility to activate a maintenance mode in the application, for example, during upgrades or major changes in the configuration. While in maintenance mode, only super administrators can log in to the administrative part of the application.

For the super administrator to ensure that, for example, a change in user rights works as intended, we have now made it possible to use the *Login as* feature while in maintenance mode. The function is available in the form of a button in each user's details.

## Automatic sign out in case of inactivity

For security reasons, you can activate a setting that means that a user who has been inactive for a certain number of minutes is automatically logged out. You can find the setting under *Administration > System > Settings*.



## Import of survey categories and respondent categories

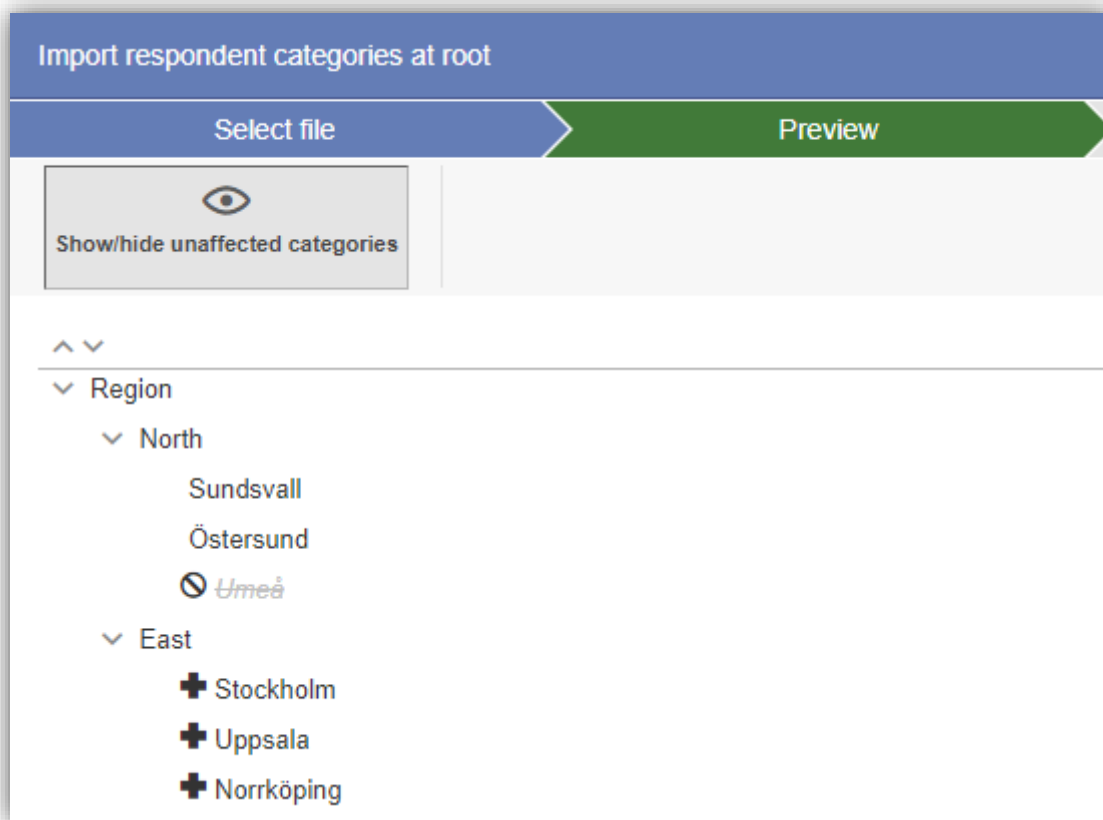
You can now import Respondent categories and global survey categories via file. This import is practical if you want to import a hierarchical respondent category with sub-categories at many levels. The import is also helpful for importing multiple sub-categories that you need to update regularly, leading to the creation of new sub-categories and removal of sub-categories no longer in use.

You find the import option under:

- *Administration > Surveys > Global survey categories*
- *Administration > Respondents > Global respondent categories*
- *Administration > Respondents > User-specific respondent categories*

You prepare a file that reflects the category structure. You import the file using a wizard where you can preview which categories are new and therefore will be added, which existing ones will be left unchanged, and which existing ones are missing from the file. In the last step of the wizard, you choose whether the latter will be deleted or left as is.



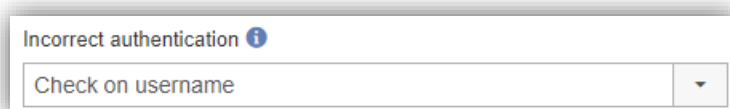


## Checking for incorrect authentications

To prevent repeated attempts to login to the system, you can enable a check for incorrect authentication. For each incorrect login attempt, the time before it is possible to try again is doubled.

Under *Administration > System > Settings*, you can select one of the following options for *Incorrect authentication*:

- *No check is made*
- *Check on username* - each unsuccessful attempt to log in with a specific username doubles the time before you can log in again with this username, regardless of from which IP number you try.
- *Check on IP address* - each unsuccessful attempt to log in from a certain IP number doubles the time before you can log in again from this IP number, regardless of which username you are trying to log in with.
- *Check on username and IP address* - each failed attempt to log in with a specific username from a specific IP number doubles the time before you can log in again with this username from this IP number.



You can also enable the *Log failed authentications* setting if you want failed login attempts to be logged under *Administration > System > Logs*.

## Password policy

Another improvement of the security is that you can now activate and use a password policy.

After activating the *Use Password Policy* setting, you can make the following settings:

- *Check policy when signing in* - The next time a user logs in, his/her password is checked, and the user is forced to change the password if it does not comply with the policy. If the setting is disabled, the check is only made when users change their password.
- *Minimum number of characters* required for the policy to be met.
- *Complexity requirements* - If the setting is activated, the password must contain characters from at least three of the following categories:
  - Uppercase letters
  - Lowercase letters
  - Numeric characters
  - Non-alphanumeric characters (*special characters*)
- *Check insecure passwords* - Activate the setting to let the application check that the password entered is not one that is considered as insecure, for example due to the fact that it is commonly used.
- *Number of days before the password may be changed*

### 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.

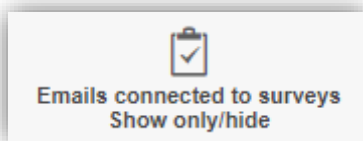
If you want emails to be automatically connected to new surveys, we recommend that you use the new possibility to create emails on survey templates, see the section above.

## System templates for emails

System email templates are now multilingual.

## Filtering of incoming e-mails in the administration

Users with access to *Administration > Email > Incoming Email* can see all emails received by the application, both those connected to surveys and those that are not. As it is usually the latter that you need to see and manage, we have ensured that emails already linked to a survey are initially hidden in the list when you enter the page. A button in the toolbar allows you to show only emails connected to the survey or hide them. In the mode where they are displayed, you can see which survey it is connected to for each message.



## 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:

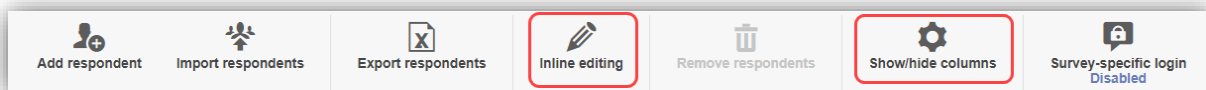
- *Warning*, the first action, displays a warning sign  on the right side of the repeated answers, together with the message “*The answer option is a duplicate*” when hovering over the field. Nevertheless, should you want the duplicates to remain the same, you will still be able to save your question.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

These settings no longer exist. Instead, inline editing is now always allowed, and which columns are displayed is automatically saved per user. Whenever a user changes which columns to be displayed, using the *Show/hide columns* button above the respondent list, the program remembers this choice and displays the chosen columns the next time the user views a respondent list, even after logging out and logging in again.



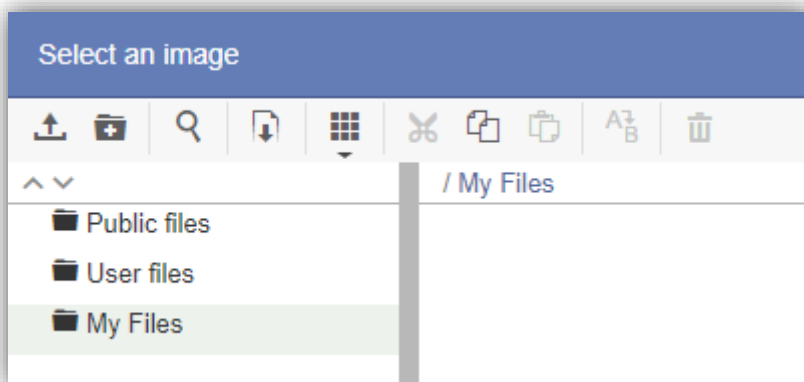
- While *Inline editing* is activated, you are able to directly edit respondent fields from the respondent list.
- Using *Show/hide columns*, you can define which respondent information will be visible in your respondent list by adding and removing columns of your choice.

### “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*.

### New document- and image archive

We have improved the built-in document and image archive of the application. The archive now loads faster, and it is simpler to upload new documents and images.



## Restrictions on files uploaded using the Attachment question type

You can now specify restrictions that apply to files that respondents upload via the *Attachment* question type. Restrictions can be specified for which file types are allowed and what maximum size in MB the files can have.

**Limits when answering survey**

Allowed file types

PDF files
...

Maximum file size (MB) i


-
3
+

















Under *Administration > Surveys > Settings > Limits when answering survey*, you can decide which file types should be pre-selected as allowed on surveys when they are created. The corresponding setting is also available at survey level under *Survey > Construction > Settings*, where you can make a specific setting for the survey.

On each individual question of the *Attachment* type, you can also make a question-specific setting for allowed file types, or choose to apply the survey's setting.

Allowed file types

Use survey setting
...

The file types that are selectable in the *Allowed file types* drop-down list (in the administration, at survey level and at question level) are decided under *Administration > Surveys > Allowed file types*. There you can select/deselect desired groups of file types via the check box/green check on the left, or delete an entire group by clicking . Within each group, you can also add a file type by typing its file extension, or delete a file type by clicking the x symbol.

<input checked="" type="checkbox"/>	↑↓	1	Document files	Extensions	<span>*.doc x</span> <span>*.docx x</span> <span>*.pdf x</span> <span>*.odt x</span> <span>*.txt x</span> <span>*.rtf x</span>		
<input checked="" type="checkbox"/>	↑↓	2	Image files	Extensions	<span>*.jpg x</span> <span>*.png x</span> <span>*.tiff x</span> <span>*.gif x</span> <span>*.bmp x</span> <span>*.raw x</span>		
<input checked="" type="checkbox"/>	↑↓	3	Spread sheets files	Extensions	<span>*.xls x</span> <span>*.xlsx x</span> <span>*.ods x</span> <span>*.csv x</span>		
<input type="checkbox"/>	↑↓	4	Archive files	Extensions	<span>*.zip x</span> <span>*.z7 x</span> <span>*.rar x</span> <span>*.tar x</span> <span>*.gz x</span> <span>*.bz2 x</span>		
<input checked="" type="checkbox"/>	↑↓	5	PDF files	Extensions	<span>*.pdf x</span>		
<input checked="" type="checkbox"/>	↑↓	6	Word files	Extensions	<span>*.doc x</span> <span>*.docx x</span>		
<input checked="" type="checkbox"/>	↑↓	7	Excel files	Extensions	<span>*.xls x</span> <span>*.xlsx x</span>		
<input type="checkbox"/>	↑↓	8	Zip files	Extensions	<span>*.zip x</span>		

If no file types are selected in the *Allowed file types* drop-down list, on a survey or question, all file types will be allowed. Note that this includes all file types, not just those that are selectable in the list.



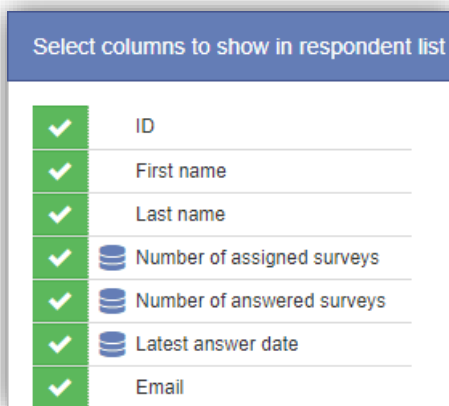
When it comes to limiting the maximum file size, you make a default setting for the system under *Administration > Surveys > Settings*. You can also specify this setting at survey level (or there select *Use system setting*) and at question level (or there select *Use survey setting*).

### New columns in the respondent database

In the program, you can choose to import respondents specifically to each survey, or to import them into the system's global respondent database. The latter may be relevant if you want to set up panels with respondents who regularly respond to surveys.

In this case, it may be interesting to see in the respondent list under *Administration > Respondents* how many surveys the respondents in the panel have been linked to and answered, and when they last answered a survey. For this purpose, we have now added three columns that are selectable via the *Show/hide columns* button:

- *Number of assigned surveys*
- *Number of answered surveys*
- *Latest answer date*



<i>Number of assigned surveys</i> ▾	<i>Number of answered surveys</i> ▾	<i>Latest answer date</i> ▾
1	1	09/12/2021
1	1	09/12/2021
2	1	11/03/2021
2	1	10/03/2021
1	0	-

Please note that for anonymous surveys no answer date is saved on the answers, for anonymity reasons, and therefore the date under *Latest answer date* is not updated when a respondent answers an anonymous survey.

On a survey that is strictly anonymous (the setting *Exceptions from anonymity restrictions* is deactivated), the information about whether the respondent has answered or not is not available. This means that an answer to a strictly anonymous survey does not update the number under *Number of answered surveys*.

### **License - new page in the Administration**

The information about your license, which was previously found under the *Help* menu, can now be found on a new separate page under *Administration > System > License*.

In the group rights, you can decide which groups have the right to see the page. To be able to edit the license information, you must be a super administrator.