



# Survey&Report

**i** V 5.0.8546.0 – New features



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[info@artologik.com](mailto:info@artologik.com)

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## General

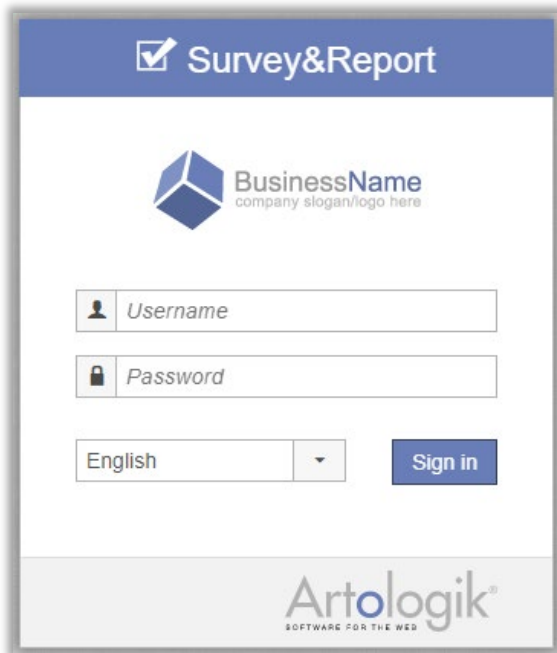
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### Login administration interface

Under *Administration > System > Login*, you will now find Survey&Report user login-related settings.

If your users log in via external authentication, you can choose to disable the "normal" login with username and password. You can also administer the endpoints through which login occurs and, e.g. decide whether new users should be able to create themselves by logging in via the endpoint and to which user groups/organisations users should be connected.

Finally, you can display a customised login page and adapt its design. For example, you can show your logo in the login window.



## Surveys

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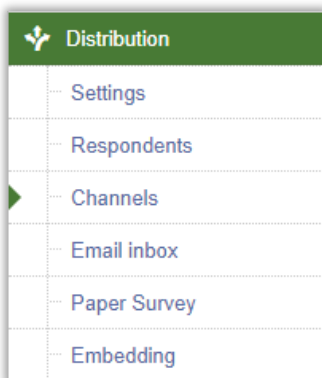
### Restructuring of submenus in the Distribution menu

Further down in this document, you can read that sending out surveys via SMS is now possible. Consequently, we have also restructured the *Distribution* menu.

We have renamed the *Mailing* menu to *Channels*. Under *Channels*, you will find the three tabs *Email and SMS* (previously Email), *QR code* (previously under the menu Other distribution) and *Letter*.

*Email inbox*, previously a tab under *Mailing*, now has its own menu.

At last, we have renamed the *Other distribution* menu to *Embedding*. *Embedded*, *IFrame* and *Pop-up* tabs remain there, while the *QR code* tab has been moved to *Channels*.



### Improved display of mailing errors

The list of emails is now more detailed to clarify what has happened and what will happen to the individual emails sent to respondents. We have added a new column to the list, and each column shows the following:

- *Pending*: Number of emails *Waiting to be processed* and *Queued*
  - *Waiting to be processed*: Number of emails waiting to be sent or queued.
  - *Queued*: Number of emails in a queue waiting to be sent.
- *To be resent*: Number of emails where a temporary error occurred while trying to send and where a retry will automatically be made.
- *Error*: Number of emails where a permanent error occurred while trying to send and where a retry will not be made. It also shows how many of these resulted in a bounce email.
- *Sent*: Number of emails sent without errors.

<input type="checkbox"/>	Status ▾	Message type ▾	Subject ▾	Date ▾		Pending ▾	To be resent ▾	Error ▾	Sent ▾	
<input type="checkbox"/>		First message	\$\$SurveyName\$ - \$FirstName\$	26/05/2023 10:47		0 / 60	6	11	133	

In the mailing list, you can also see if there is an error with the email account used for the mailing. In addition, an icon is shown by the email if the mailing resulted in an incoming reply email.

## Improved survey history

Sometimes it can be helpful to see what has happened to a survey, when it happened and which user was involved. In this version, we have expanded the visible events under the *Changelog* tab on the survey dashboard.

New events that are now logged:

- Survey name changed
- Survey type changed
- Respondent unregistered
- Respondent reregistered
- Construction reopened
- Message created
- Message removed
- Question edited
- Logic created
- Logic group created
- Logic edited
- Logic group edited
- Logic removed
- Logic group removed
- Settings saved (under Construction/Distribution)
- Respondent edited
- Message edited

Shortcuts

Changelog

**Message edited, id: 9769, subject: Subj...**  
30/05/2023 15:32 Mary Jones

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**Message created, id: 9769**  
30/05/2023 15:32 Mary Jones

---

**Survey published**  
30/05/2023 15:31 Mary Jones

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**Finished construction**  
30/05/2023 15:31 Mary Jones

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**Survey edited**  
30/05/2023 15:31 Mary Jones

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**Respondents removed, id's: [ 5 ]**  
30/05/2023 15:29 John Smith

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**Question removed, id: 5**  
30/05/2023 15:29 John Smith

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**Respondents created/imported, amount: 4**  
30/05/2023 15:26 Mary Jones

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**Logic created, id: 1, name: ABC**  
30/05/2023 15:22 Mary Jones

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**Question created/imported, amount: 7**  
30/05/2023 15:22 Mary Jones

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**Survey edited: (2 actions)**  
30/05/2023 15:22 Mary Jones

---

**Survey created**  
30/05/2023 15:22 Mary Jones

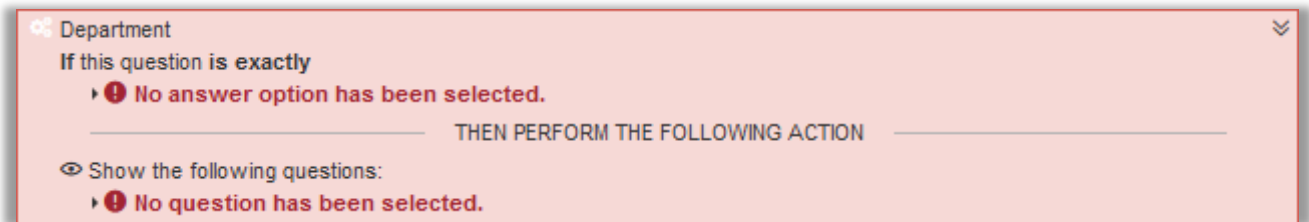
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Show full changelog

## Validation of logic

This new validation helps to avoid publishing surveys with logic that does not work. The validation controls, for example, the following:

- That conditions and actions do not miss values. For example, not selecting which answer option applies to the condition and/or not selecting which question is affected by the action.
- That the selected questions and answer options still exist.
- That the selected respondent categories are still linked to the survey.
- That actions using multilingual values have translations in all languages of the survey.

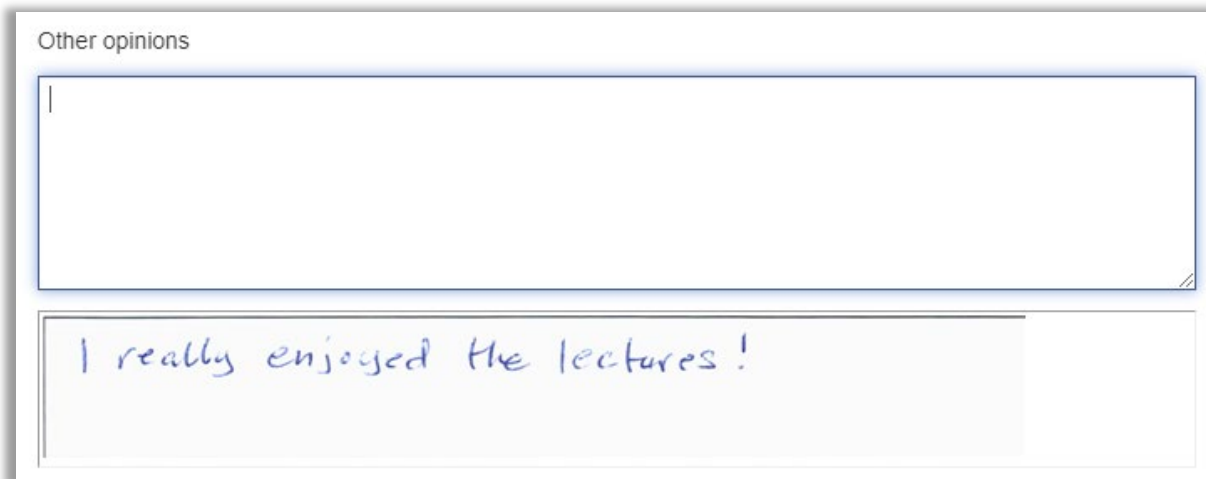


## When copying the first message, Reminder is selected

When you copy a message, the copy gets the same message type as the original. However, since you only want several messages of the type *First message*, in exceptional cases, we have changed so that the copy, in this case, gets the message type *Reminder*.

## Showing text answers in the paper survey

If you have chosen to include text questions in a paper survey, the scanned text response is now displayed next to the question when you click on the survey, allowing you to enter the text of the question easily.

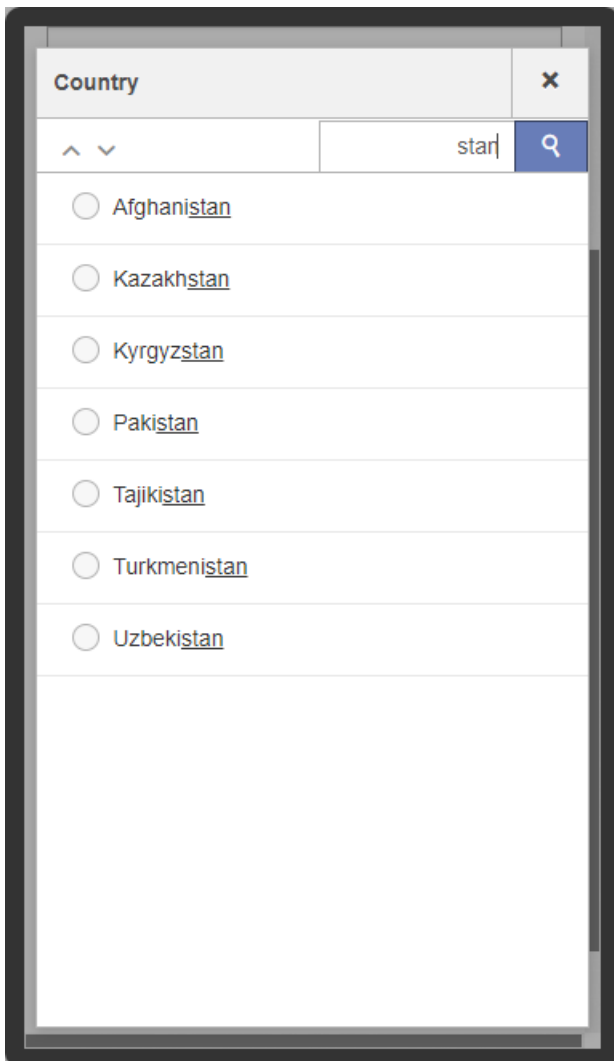


## Possible to choose data separator when exporting responses as a text file

Under *Survey > Answers > Export data*, the raw data can be exported to *Excel*, to *SPSS* or as *Text*. When exporting in text format, you can now choose which data separator to use in the export: *Tab*, *Comma*, *Semi-colon* or *Space*.

## Presentation of respondent categories in mobile phones

If you allow your respondents to update their respondent category values when answering a survey, it is now easier for them to search and select the desired category when answering on a mobile phone.



## Reports

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### Customisable page break after subreport selection

When you make a selection in a subreport or the main report (if filtering is allowed there), the selection is viewed at the top of the report. This information was previously always on a separate page when exporting the report. Now you can use a setting to choose that no page break should be made after the sub-report selection so that the report content starts directly afterwards on the same page. You select a default setting in the administration, but the setting can also be made specifically for an individual report or subreport.

### Aggregate report - tabular data and selections

The aggregate report benefits those who conduct surveys from survey templates. The survey results can then be presented comprehensively in an aggregate report. We have now made several improvements to the aggregate report.

Survey categories and owners can now be presented as tabular data in the report content. Survey owners can also be used as selections in the report.

Analyse functions, already present in the standard reports, are now possible to use in the aggregate reports - and to present tabular data. For example, you can create analyse functions that calculate an overall average, or index, for several questions.

### Aggregate report - present the number of respondents and response rate to public surveys

One thing that can be presented as tabular data in a aggregate report is the number of responses and response rate. We have now added the possibility to also show the total number of respondents. On a respondent survey, it is the number of respondents linked to the survey, while on a public survey, it is the number specified in *Expected number of answers*. The latter is now also used to present a response rate on public surveys, i.e. the actual number of responses divided by the expected number.

### Aggregate report - possible to copy

In the previous version, we added the possibility of copying standard reports. As of this release, copying aggregate reports is also possible.

## Templates

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### Deciding the sorting of questions generated from predefined reports

So-called predefined reports can be created for survey templates. These determine how the survey template's questions should be presented and can be generated with one click from surveys based on the survey template.

When a survey report is generated from a predefined report, it is decided whether all questions should be included. This includes questions you have created yourself and any questions from the survey template that you edited. Previously, such "own" questions ended up last in the report. Now it is possible to choose (via a setting) that the questions shall be presented in the same order in the report as in the survey. This can be set as default under *Administration > Reports > Settings* or on each individual predefined report.



## Administration

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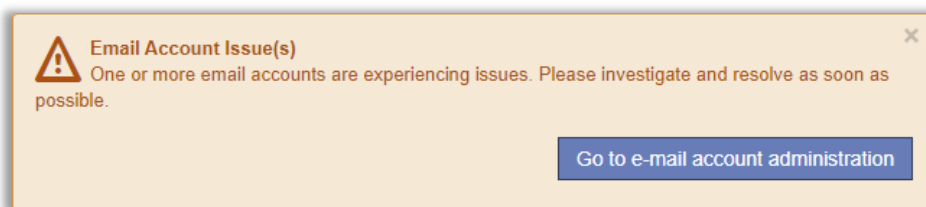
### Improvements Incoming email

Under Administration > Email > Email inbox, all received emails are listed. In this interface, you will now find some improvements.

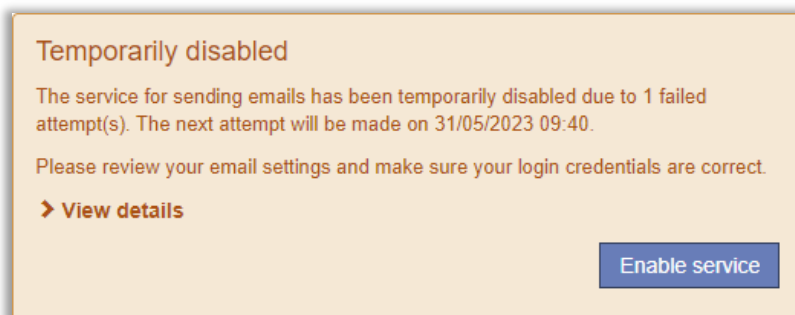
- An option to select all messages, which can be useful if you want to delete several messages at once.
- The ability to switch to the next/previous message after clicking on an email. This option is also available under *Email inbox* at the survey level.
- *Reply* and *Forward* buttons are now clearly visible icons at the top of the window after clicking on a message.

### Email account error notification

If a problem occurs with an email account used in the system, a notification is now displayed immediately after login for users who are authorised to administer email accounts.

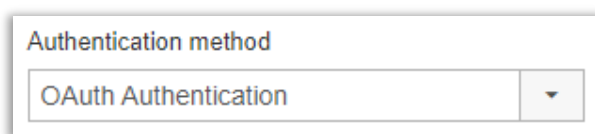


In the administration of the email account, you can see detailed information about what the problem is. In case of unsuccessful attempts to send or retrieve emails, the service for sending or retrieving emails is deactivated, first temporarily and after many unsuccessful attempts permanently. If the problem is fixed, the service can be manually reactivated.



### Possibility of choosing authentication method for SMTP

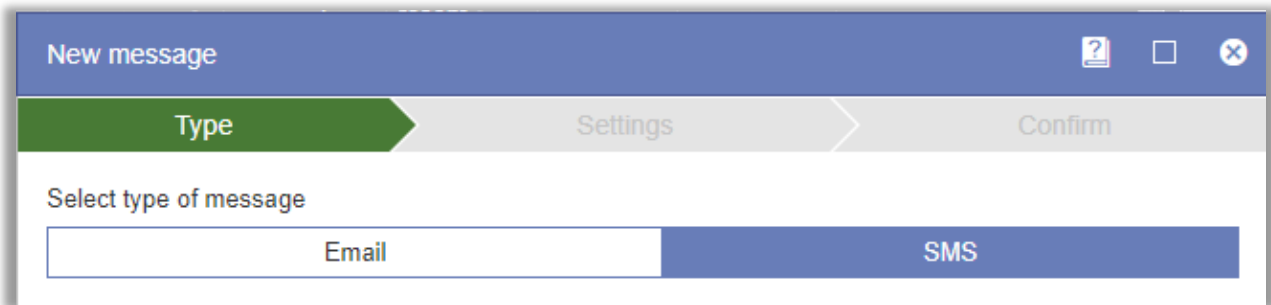
In the administration of email accounts, you can now choose between *Basic authentication* and the more secure option *OAuth authentication* as your *Authentication method*.



## New plugin - SMS

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There is now a new plugin that enables mailing via SMS from Survey&Report via an SMS Gateway. A mailing via SMS is done directly from the survey, the same way as mailing via email. You have access to the same message types and several tags. For more information, please contact us.



## LTI plugin

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### Possible to select more than one Authentication Endpoint

If you are using Survey&Report with your LMS tool and need users to be able to authenticate against different endpoints (e.g. one for teachers and another for students), it is now possible to select multiple options under *End points* in the LTI administration.

### Possible to reset users' LTI connection

Resetting the user's LTI link is now possible in the user editing dialogue box. This forces the user to re-authenticate to use Survey&Report via LTI, which is useful when user rights are changed.