Artologik Survey&Report

New features, Version 4.2
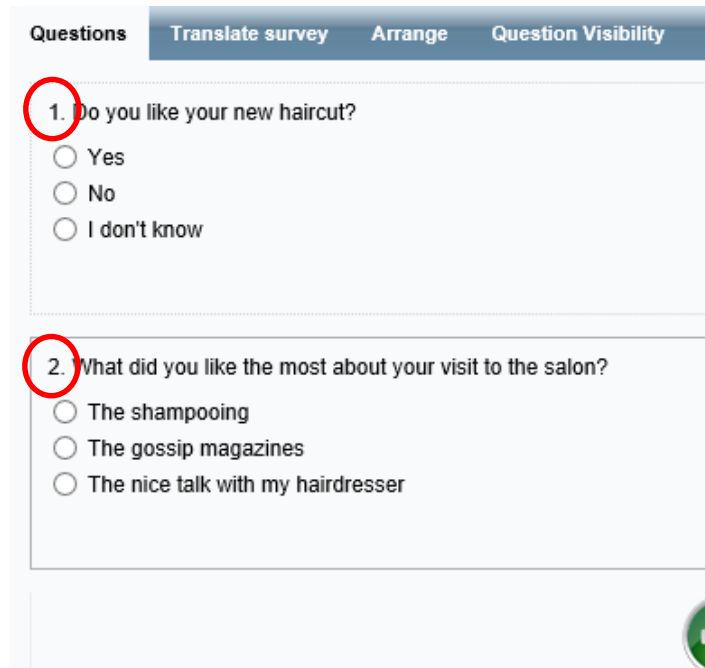
Content

New features, v.4.2

Surveys

Return to last visited page

When respondents save and leave the survey before it is submitted, they now return to the last visited page when re-opening the survey

Question numbers added

We have added question numbers in the interface when creating and editing questions, giving you a better overview when working with your surveys.

Pasting answer options

When you create a question with answer options you may now paste them instead of creating them in the usual way. This is especially useful when your questions have many options.

In the question editing view click the tab *Text* and paste the answer options separated with a line break

When you alternate back to the tab *List* the answer options have been created.

Questions with searchable answer options

On questions with the answer type *Select Box and Drop Down List* you can make it possible for the respondent to search for an answer option to choose. This is to make it easier for the respondent when you have many answer options.

When the function is activated, a search box will be available in the question where the respondent writes all of or parts of the answer he/she wants to choose. The options matching the search will be displayed in a list where he/she may click on the wanted option.

You may activate the function when you edit the question by checking the box by 'Enable search mode'.

If the question contains more than 75 answer options only the first 50 will be displayed before a search has to be made. If you do not wish to give favour to the first 50 answers (as they appear first) you can choose to let all answer options be hidden until a search is made. In that case check the box by 'Force the respondent to perform a search when the question contains more than 75 answer options'.

In the editing view for the question you may also decide how the texts for the search function should be worded. These are texts shown in connection to the question as it is answered.

Search mode texts		
Select answer option:	Select an answer option	
Select all:	Select all	
Too many results:	The list shows $Count$ of $Total$ answer options matching your search. Refine the search to find the desired answer option.	
Make a search:	Make a search to find the desired answer option	
No search results:	No results match	

Note that the search of answer options does not work in the mobile mode but will be shown as a normal drop down list/select box instead.
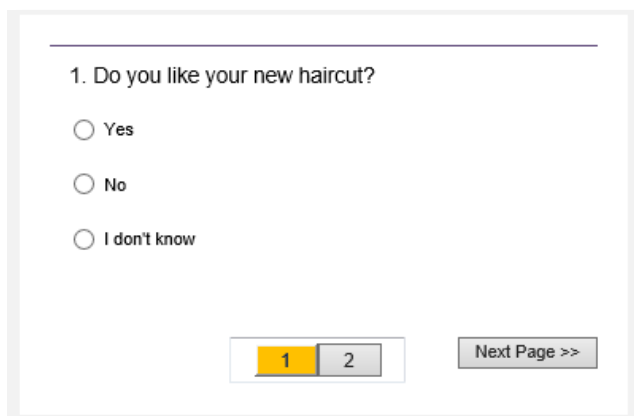
"Almost compulsory questions"

If you add the "I don't know" option to a mandatory question it is now possible to first hide that answer option, in order to try to make the respondents choose one of the "regular" answer options. The "I don't know" option will be displayed only when a respondent tries to leave the page or submit the survey without answering that question. The respondent cannot leave the page or submit the survey without selecting either a regular answer or "I don't know".

New alternatives for conditions

The new alternatives enable you to enter conditions for actions if the respondent answers with more or less than a decided number of answering options. For example, if you want to ask the follow-up question B when the number of answers on question A is more than three, you can create a condition under the tab *Conditions*, with the meaning *If Question A. has at least 4 answers, show question B.*

Progress indicator: Clickable page numbers in online surveys

We have made it possible to display page numbers and for respondents to jump between the pages of the survey.

We call these new progress indicators *Navigation* and the electable choices are: *buttons*, *dropdown list* or *links*. By clicking a liked page number, you are redirected to that specific page. There is also the possibility to add *text*, however this is not linked.

We have also made it possible for you to style the progress indicators, allowing you to have separate looks of, for example, pages visited and where unanswered questions remain. You decide the look of the progress indicator under *Survey construction > Design > Progress indicator*.

Please note: Enabling respondents to jump between pages is a function which is not recommended if you are using compulsory questions and/or filters.

Style sheet editor (CSS)

We have now made it possible for advanced users to edit the style sheet. However, since CSS knowledge is required, this is a user right where authorisation is given by the administrator.

The user right setting can be found under *Administration > Users > Groups > Templates*. Mark the radio button "*Modify*" by *Edit theme with style sheet edition (CSS)* if you wish for users in the group to be able to edit the style sheet using CSS. As default "*None*" is marked for all user groups, meaning no editing can be done.

You edit the style sheet under *Survey construction > Design > Advanced: Style sheet editor (CSS)* where you click the editing button. This can also be done under *Templates*.
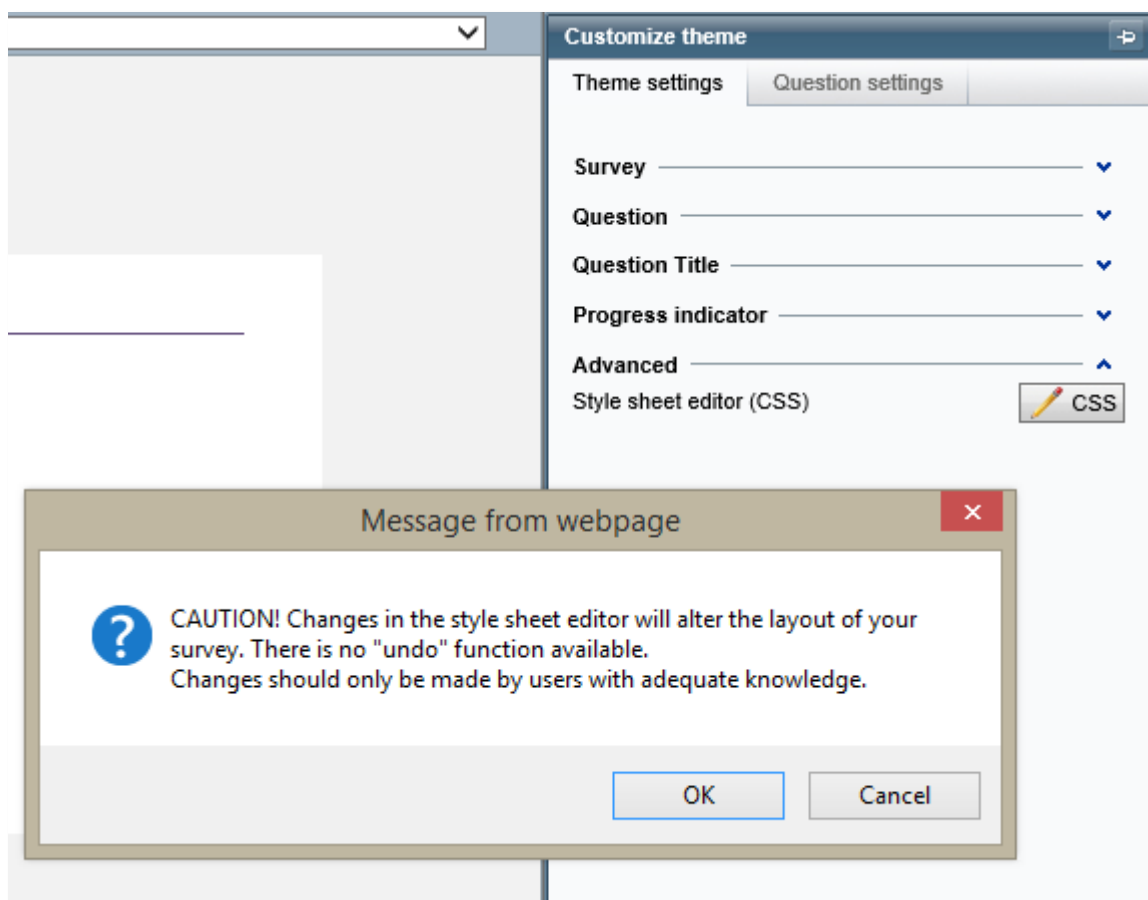
Please note: Since this is an advanced function, a notice of caution will appear before the editing tool is opened.

Random sorting of answers for anonymous surveys

When exporting raw data for *Anonymous surveys* the sorting of answers now appear in random order and the answer id has been changed to 0 for all answers. This goes for both the export under Data collection, as well as the one under Data set.

Anonymous respondent surveys

To further protect the respondents' anonymity we have added a number of restrictions to anonymous respondent surveys:
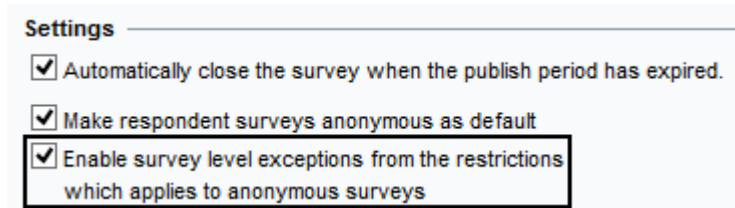
- Information on whether the respondent has replied or not, is not available
- Users will not be able to answer the survey for the respondent from the respondent list.
- Exporting raw data from *Data Collection > Export* can no longer be done before the survey is closed.
- You can no longer create a report based on the survey before it is closed.
- You cannot see which respondents have received mailings. Only respondents that was not reached by the mailing are listed under details.
- You cannot see/edit text answers (under *Data Collection > Text Answers* until the survey is closed.

The limitations above are relevant for surveys with the following settings:

Under *Administration > Settings* you can activate a setting that allows exceptions to the limitations to be made on survey level:

The check box *Allow exceptions from the restrictions which applies to anonymous surveys* will then be enabled on survey level. Check this box on an anonymous survey and the anonymity will work as it did before, the limitations noted above will no longer apply.
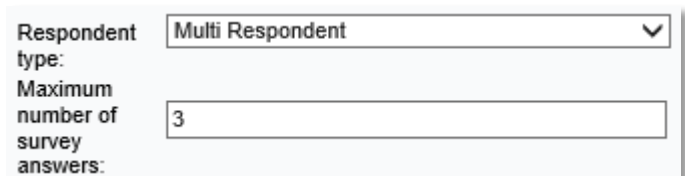
Multi Respondent – allow multiple answers from the same login

There might be occasions when you need to give respondents the possibility to answer a survey more than once. This could, for example, be if you are a marketing company performing surveys and wish to facilitate the administration by only sending one set of login credentials to each participating company/organisation. In that case this is the perfect solution!
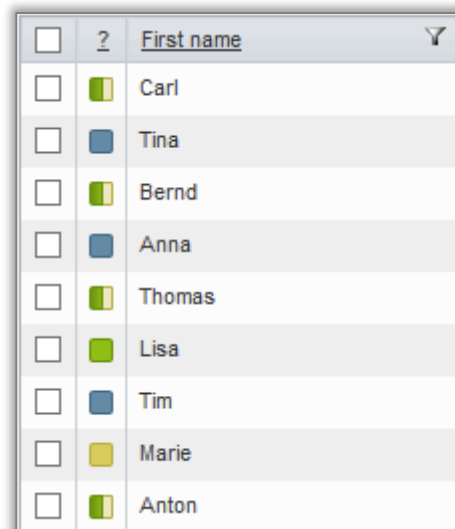
In order to enable multiple survey answers a setting is made per respondent under *Respondent details > Respondent type > Multi Respondent* – or upon user import from a file – where you by *Maximum number of survey answers* specify how many times the respondent should be able to answer the survey.

If someone tries to log in to the survey after the maximum number of survey answers has been reached for the respondent connected to that login, an error message will be shown informing the respondent of this fact.

In the respondent list you can see how many times the survey has been answered for this respondent. The respondents who have the possibility to give multiple answers have a yellow/green icon ▯ in front of their names if some but not all responses have been registered. This icon changes to green once the maximum number of answers has been reached. Hoover with the mouse over the icon in order to see how many of the maximum number of answers have been given.

The categories and properties of the respondent used for the login are saved with each answer for that login. This allows you to filter your reports by for instance organisation or country.

A respondent who is Multi Respondent cannot save the answers and later return to the survey in order to complete it, nor go backwards to change the given answers.

Limitation of respondent amount per survey

In order to prevent mass mailings, you can activate the function *Respondent limits*. Herewith you can limit the amount of respondents the users are allowed add to their surveys.

A user group setting defines how many respondents the connected users are allowed to add at the most to a survey. A system default setting is used for user groups have no limit specified.

If a user (for example a student) tries to exceed his/her limit, he/she will get an error message prepared by the system administrator.

If the user in exceptional cases needs to add more respondents that permitted, he/she can add another user (for example a teacher) with a higher limit as an *authorized user* to the his/her survey. The new survey user (the teacher) can then depending on his/her user rights either:

- add the extra respondents or
- raise the maximum limit of respondents for that survey, in order for the survey owner to be able to add more respondents.

The application includes two new user rights (in the user group, Administration > User : tab Group) for the purpose mentioned above;
A user can get the right to…

- increase the respondent limit on survey level up to his/her own limit (on surveys where another user is survey owner). With this right the new (authorized) survey user can leave the adding of extra respondents to the survey owner.
- add an unlimited about of respondents to a survey. With this right the user can add as many respondents as he/she wishes to a survey
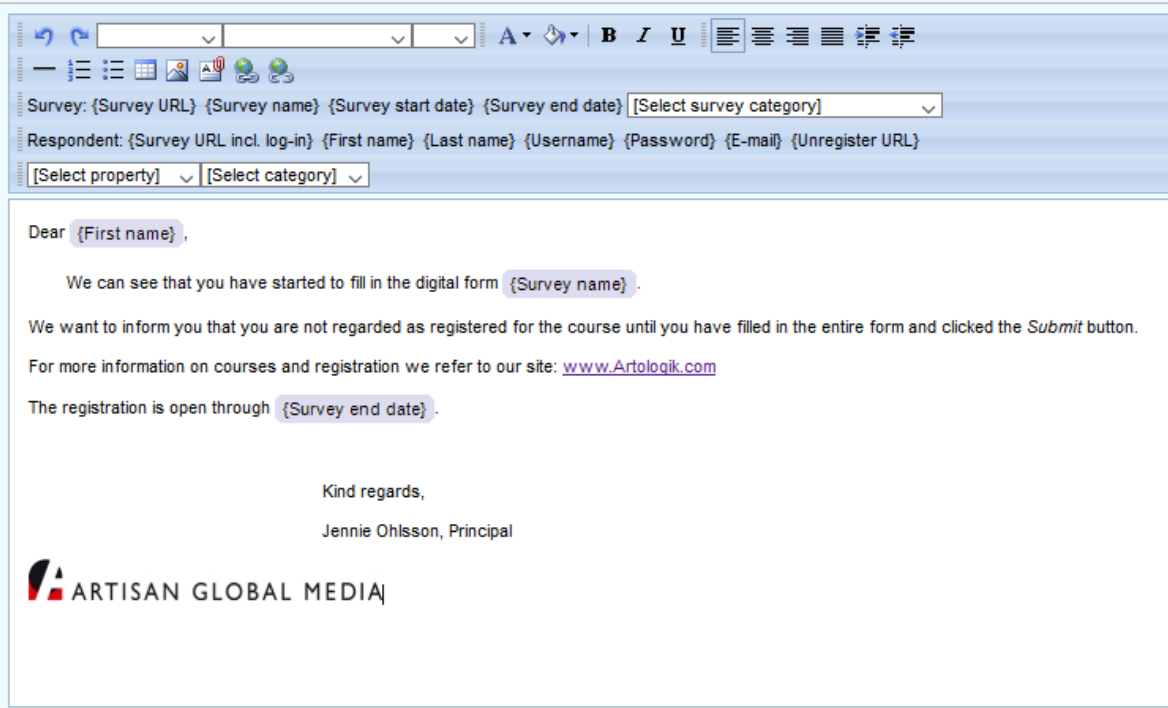
The *Super Administrator* also has the possibility to inactivate the respondent limitation on survey level.

You activate this function under *Administration > Settings : Limit amount of respondents per survey.*

New type of mailing: Respondents with a survey in progress

A mailing of the type *Respondents with a survey in progress* will be sent to the respondents that have started answering and saved the survey but not yet submitted it.

Reports

Do not show report when the answer count is too low

Under the basic information of the report, as well as in the settings for each chart and table, you can choose to hide answers if the number of responses is fewer than the stipulated value set by you (when using background variables or filter series).

The general setting for the entire report is made under *Reports > Basic information > Properties > Limits*, where you by *Minimum answer count to display a value* type the minimum number of responses in order to show the question.

New features, v.4.2

New button to copy variables under the data set of the report

We have added the possibility to copy variables when working with your original data set, as well as the newly calculated data or the one created through the *Add Analyse Function*. Click the copy button [icon] in order to create a copy.

New variable labels – Total and Empty

When you present questions in reports you now have access to two new labels, *Total* and *Empty*.

Below is an example of how the label *Total* might be used. In the chart, the variable G*ender* is used as a background series to present the mean for men and women separately. By using the label *Total* you can also show the total mean for men and women together.
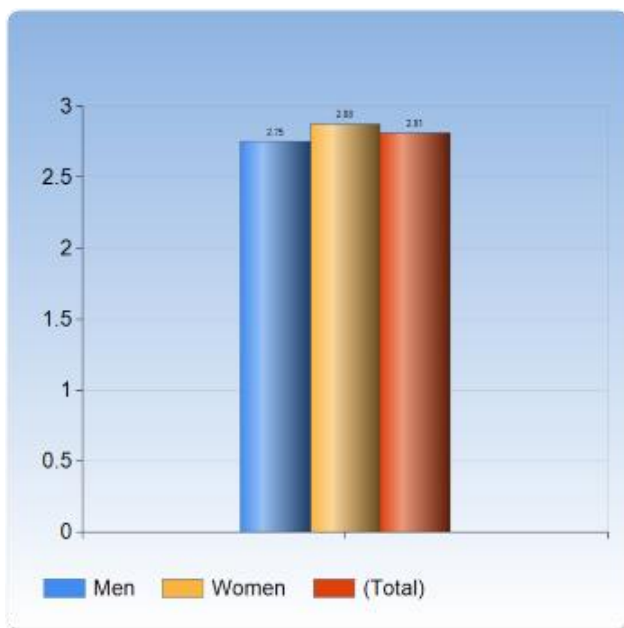
The label *Empty* is included if you wish to show how many left a question unanswered.
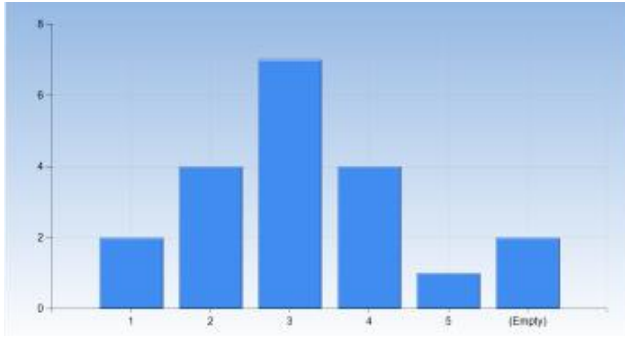
Please note that the labels *Total* and *Empty* are at the moment only available for questions, not for respondent categories.

Include empty labels

In the chart settings you can now choose to include or exclude empty labels. A reason to include them is if you want a specific label to be represented by the same colour in different p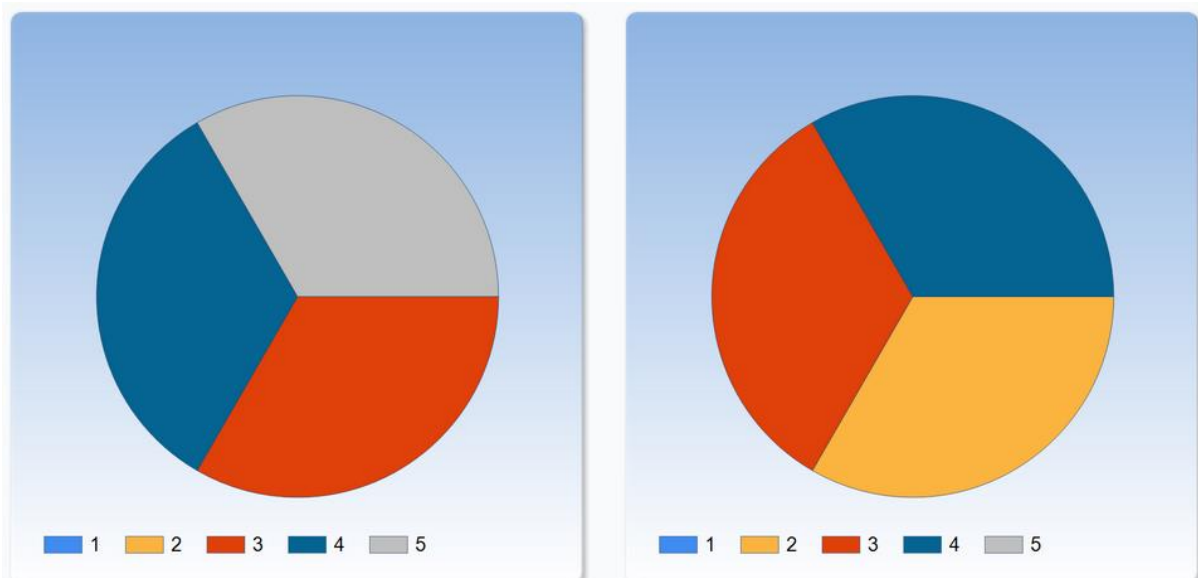ie charts. In the example below the result of two questions are presented side by side. Both questions have the answer options 1-5. In the left chart there are no answers of 1 and 2 and in the right one there are no answers of 1 and 5. If the empty labels are excluded alternative 3 in the left chart will be represented by blue while the same option will be represented by yellow in the right one.
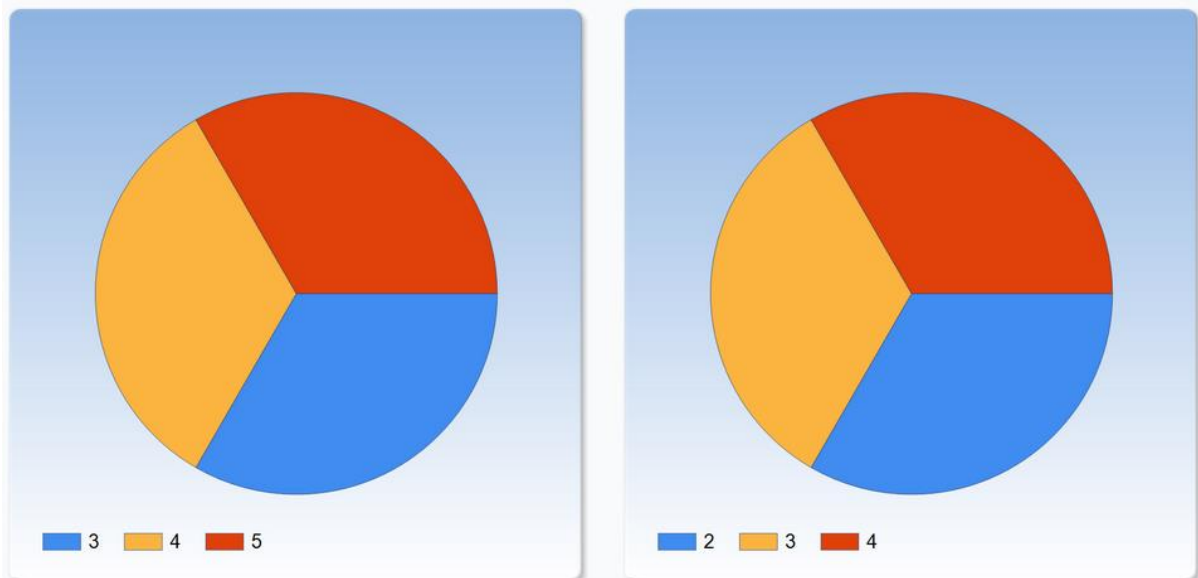
If you choose to include the empty labels, they will also be represented by a colour, which means that all options will have the same colour in both charts.

Reversed axes in charts
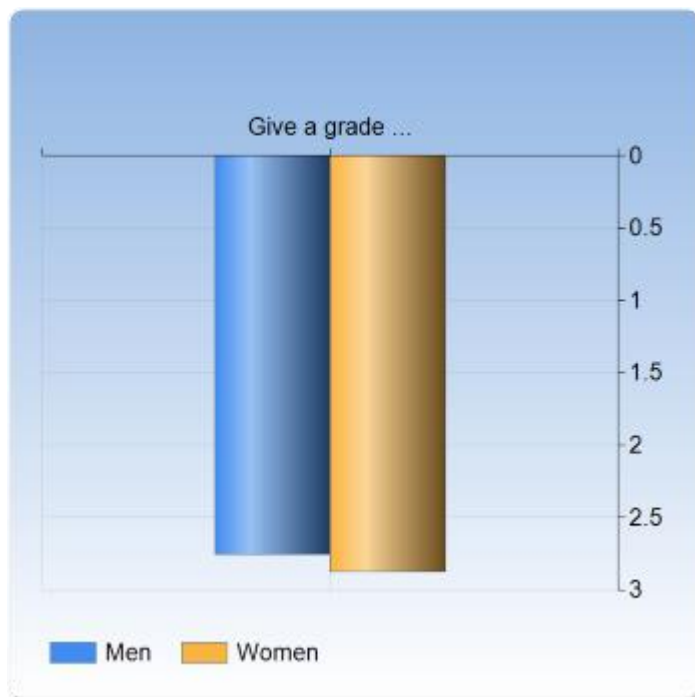
In the chart settings you can now choose to place the axes reversed.

In the example below the X-axis is showed at the top instead of at the bottom, and the Y-axis is placed on the right instead of on the left.

New features, v.4.2

Hierarchy reports

We have added a new report function which enables you to present your results filtered on different levels simultaneously. With this function you are for instance able to create a report where you compare:

- The answers from the entire organisation
- The answers from one department
- The answers from one group

You can choose to either predefine the report information or let the report readers choose how to filter the data in selected sections of the report. Using the selection lists in the report introduction, the report readers could for example display the results from their own group and compare their result with the results from the department and the whole organisation, displayed in other sections.

A **hierarchy variable** defines how the answers shall be filtered in the report. The variable can be based on one or several respondent categories. It can also be based on answers to questions in the survey.

We have also added a new presentation opportunity which lets you combine both charts and tables; the **hybrid element**. You use it to present data in various levels in a hierarchy report. You can also use this hybrid element in a standard report without any hierarchy variable, just to combine a chart with table columns.

In the example below the report viewer was able to select which results to display (Team 22) in the first column, and compare it to the predefined column for Total.
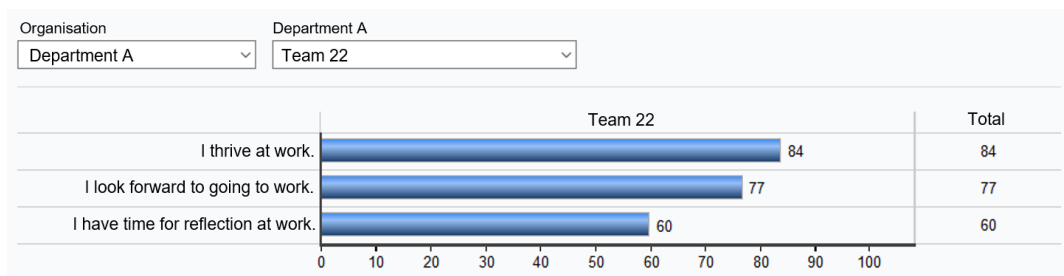
What is a hierarchy variable?

A hierarchy variable controls how the data can be filtered in different levels and enables the report viewer to make comparisons between different groups of respondents. The hierarchy variable can be built in different ways, for example:

- using the responding categories connected to the survey
- using one single respondent category which is built up by sub-categories in different levels
- combining one or several respondent categories (also sub-categories) with variables (answers) from the data set

If a respondent category with subcategories is used in the survey, the corresponding hierarchy variable is automatically generated in the data set of the report.
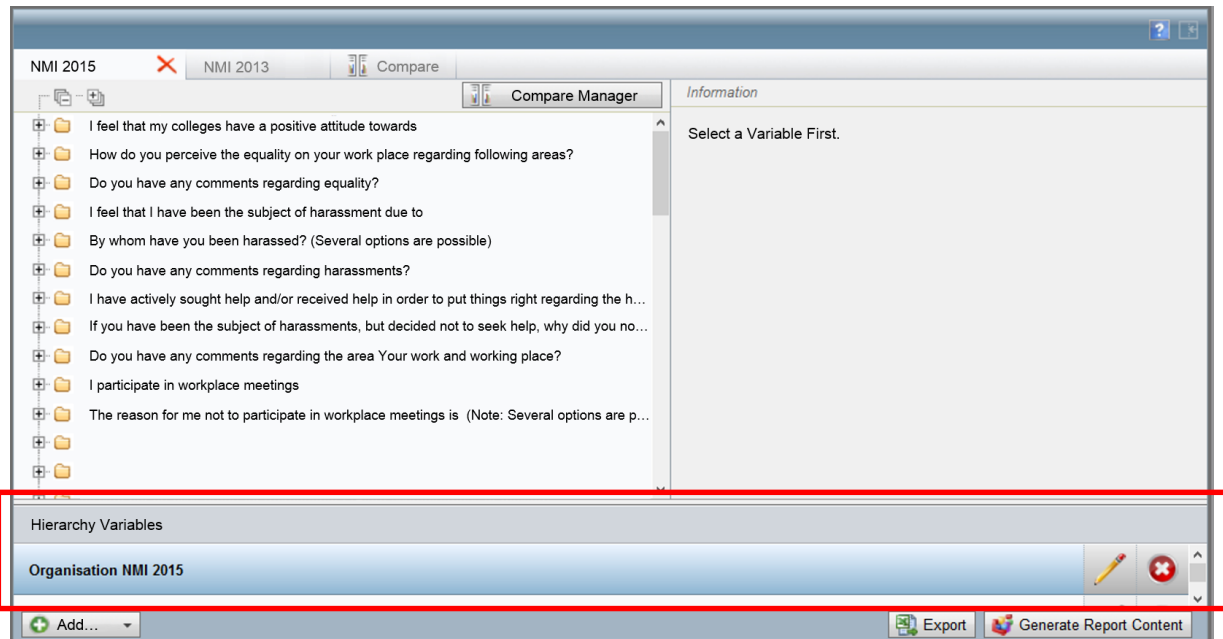
To build a new hierarchy variable, use the button *Add…* in the lower left corner and select the alternative *Add hierarchy varible.* If you use the plug-in *SR-Advanced Report*, notice that the funtions for adding data set, compute variable or analyse function is gathered under this menu.

There is no limit regarding how many hierarchy variables you can use in the same report. Each hierarchy variable could generate a new set of selection lists in the begining of the report, depending of how you use it.
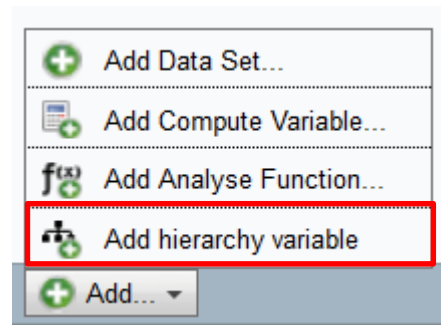

Possibilities with a hierarchy variable

If you want the options in the selection lists to conform to the subreport filter or the respondent filter of the report reader, you can mark this function when editing the hierarchy variable. If you unmark the check box, the content and the options will be the same for everyone.

If your report contains results from other surveys which used other, but corresponding respondent categories, you can still make comparisons between the results.

In your hierarchy variable, you can also enter limits per level for the minimum count of answers required to show data.
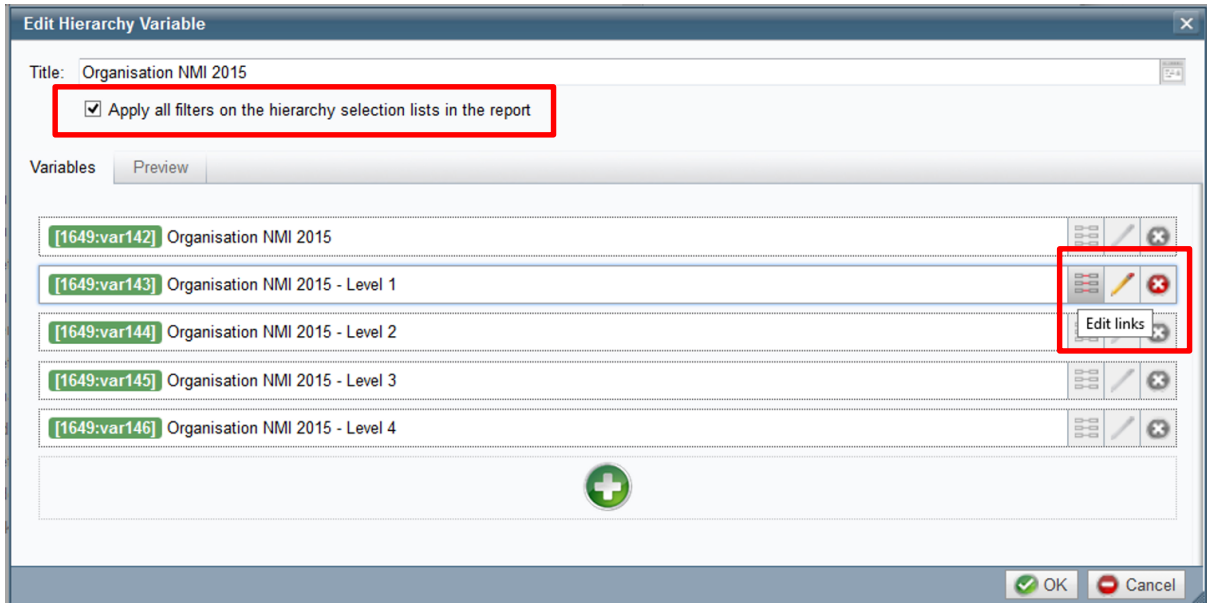
New report element: Hybrid element

When you prepare your report items you have a new alternative; the hybrid element. It can contain both charts and tables columns. For instance it lets you display your results in a bar chart to the left with the values aligned next to it. In the same time you can also present the result for the entire organisation in a table column to the right.
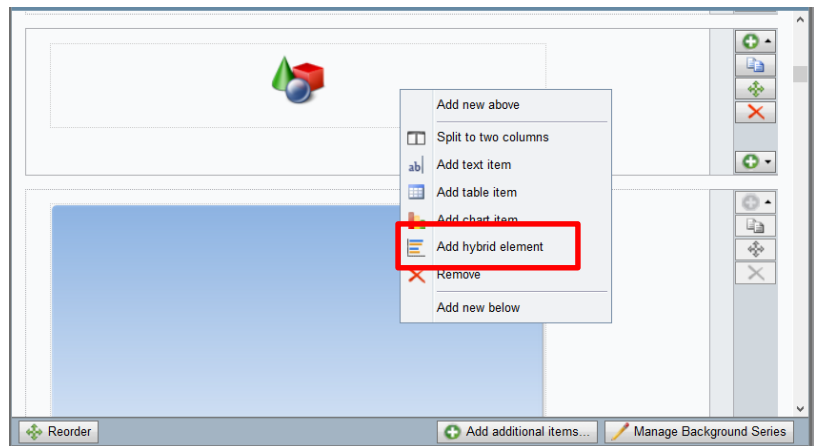
The page for editing the hybrid element is divided into four sections. (See the picture below.)

Section A: If you want to use a hierarchy variable for this hybrid element, then select which one. You can also decide whether the report reader can select hierarchy position (i. e. use selection lists to set filters) in the viewing mode of the report, or you as a report creator set the position regarding this hybrid element.

Section B: The report element initially contains two columns and one row. The left column is intended for explaining texts, for instance the title of the question you present the result for. In the right column you present the data, either in a table form or chart form. You can add as many rows and columns as you wish. Please note that the same element can contain both table columns and chart columns.

Section C: When you have marked respective column head you can enter the title of the column and also set the properties and type of content. You can select analyse functions, frequency or calculations from the different data sets of the report.

New features, v.4.2

Mark the check box *Apply all report filters* if you want the specific column to conform to the subreport filters and report readers' respondent filters. If you, for example, would like to show the result of the entire category or the main category as a comparison, the check box should be unmarked. Otherwise a report reader from the sub-department C would see the result from his/her own department also under *Total*, because the other sub-categories would be sieved out by his/her respondent filter.

If we return to the example where the respondent categories represent a company and its organisation. (Obviously it can apply to any respondent category with subcategories or any hierarchy described by a hierarchy variable.)
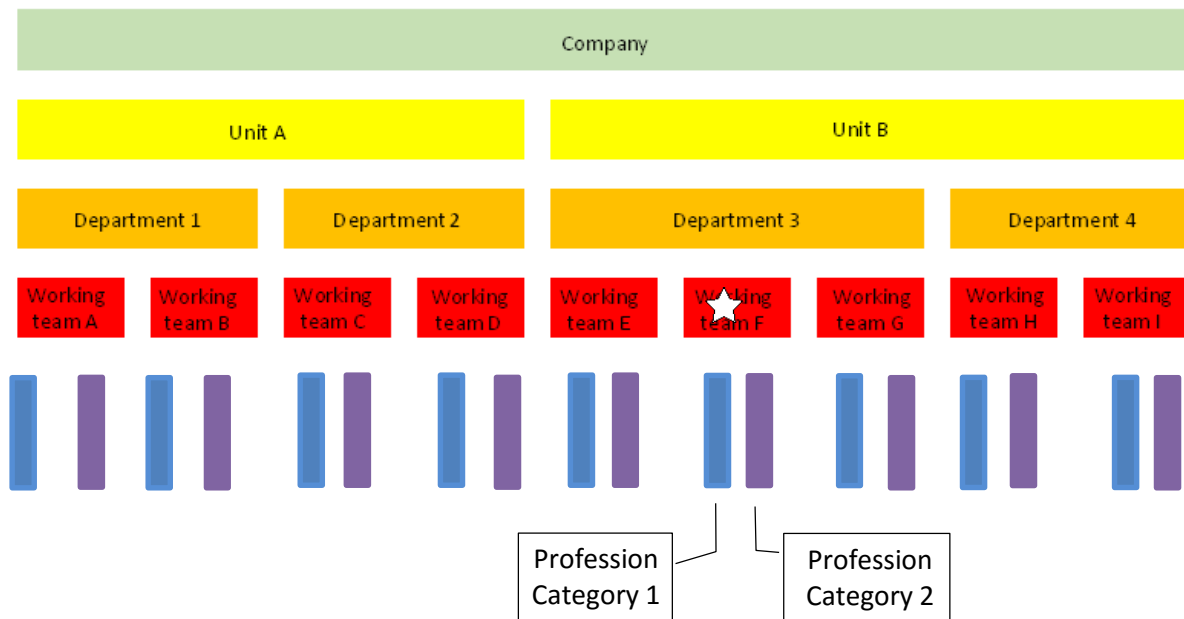
If you picture that the report reader has selected the Working team F (marked with a white star) using the selection lists in the report, the available choices will refer to the following result:

- *One level down*: Profession Category 1 under Working team F, Profession Category 2 under Working team F
- *Selected level*: Working team F
- *All levels above*: Department 3, Unit B
- *One level up*: Department 3
- *Highest level*: Unit B
- *Total*: the Company

Section D: Using the preview, you can test how the hybrid element looks for different positions in the hierarchy, selected in the selection lists.

Administration

New function: "Log in as…"

The list on page *Administration > User > List* includes all users in the system. If you as a *Super Administrator* open the page of a user, you will find the button *Log in as…* at the page bottom. Using this button you can test how the certain user role works. In order to return to your own user role, you have to log out and log in as yourself.


Expanded handling of email templates

Under *Administration > E-mails and templates > Mailing Templates > System templates* the function *Notify survey owner message* has been improved in such a way that you can add more than one template for the message automatically sent to the survey owner at closure. In the respective survey template or survey, you then specify which of the templates is to be used.

There are also new types of templates; *Report created* and *Report published*. These are used in the automation function described further on in this document. In this case too you can add several templates and specify which one to use in each survey template or survey later on.

All the templates are sorted under a template type (tab). Click the tab and then a template in order to edit it.
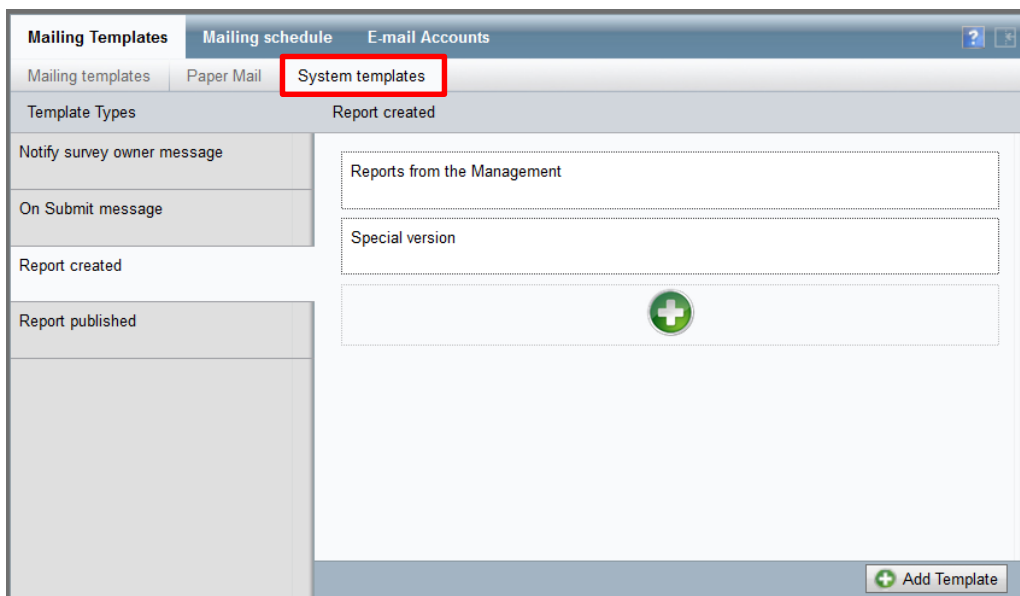
Automation – create reports automatically

You can set the application to create some reports automatically. This task will then be executed every day at the same point in time as well as using the same e-mail account. This setting on system level is made under *Administration > Settings > Surveys < Automation*.

The automation settings on survey template level

The new menu for controlling the automation exists under *Templates > Survey Templates > Survey Construction > Basic Information > Surveys*. The menu is only available if the system settings allows automation.

In the chosen survey template you regulate if you want the template to achieve reports automatically. You can make the settings compulsory and impossible to evade for a separate survey based on this template. Choose when to create the report and when to publish it in relation to the closing of a survey. Also decide which templates for mailings to use.

For the survey template to achieve reports automatically, there has to be predefined reports connected to the survey template. Without predefined reports, the automation will lead to emails being sent at the closure of the survey alone.

In the list of predefined surveys you can decide:

- which reports should be created
- if the questions of the survey user should be included in the report
- if the owner and/or users should have the report created notification
- if the report should be published
- if the respondents should have a report published notification

New features, v.4.2

The automation settings on survey level

If the settings on survey template level are not locked, the same automation menu exists regarding the separate survey, under *Survey > Construction > Basic Information > Properties*. This is where you make adjustments concerning the particular survey in question.

Links under the left side menu

Under the menu *Administration* as well as *Help*, you can enter your own links to optional pages where you can show important information needed by the users. You can also create tabs in the root menu which in turn contain links. You administrate these links under *Administration > Settings > Application > Menu links.*

New features, v.4.2