



Survey&Report

 V 5.0.9008.0 – New features



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Surveys

View/export not submitted answers

Users can now be given access to answers that have been saved but not submitted. The rights are assigned via the following options in the user group rights:

Answers	None	View	Deny
Show answers	None	View	Deny
Show unsubmitted answers	None	Yes	Deny
Export data	None	View	Deny
Respondent data	None	Yes	Deny
Export unsubmitted answers	None	Yes	Deny
Handle text answers	None	View	Modify
Handle unsubmitted text answers	None	Yes	Deny

Report menu	None	View	Deny
Construction	None	View	Deny
Settings	None	View	Modify
Content	None	View	Modify
Regenerate report	None	Yes	Deny
Data Set	None	Modify	Deny
Include unsubmitted answers	None	Yes	Deny

For these users to also have access to unsubmitted answers given to anonymous surveys, the *Allow access to unsubmitted anonymous answers* setting must be enabled. Please note that if this is allowed, there may be more answers to a survey than there are respondents. Since there is no connection between the unsubmitted answers and the respondent, each answer that the respondent starts will be saved as a new answer.

Anonymity settings

Enable survey level exceptions from the restrictions which apply to anonymous respondent surveys

Allow access to unsubmitted anonymous answers

Anonymisation warning

Under the menus *Show answers*, *Export data* and *Handle text answers*, you can find the button or drop-down list *Answer status*. The default option is *Submitted answers*, but if you click the button, you can choose to see *All answers* (both submitted and not submitted) or only *Unsubmitted answers*.

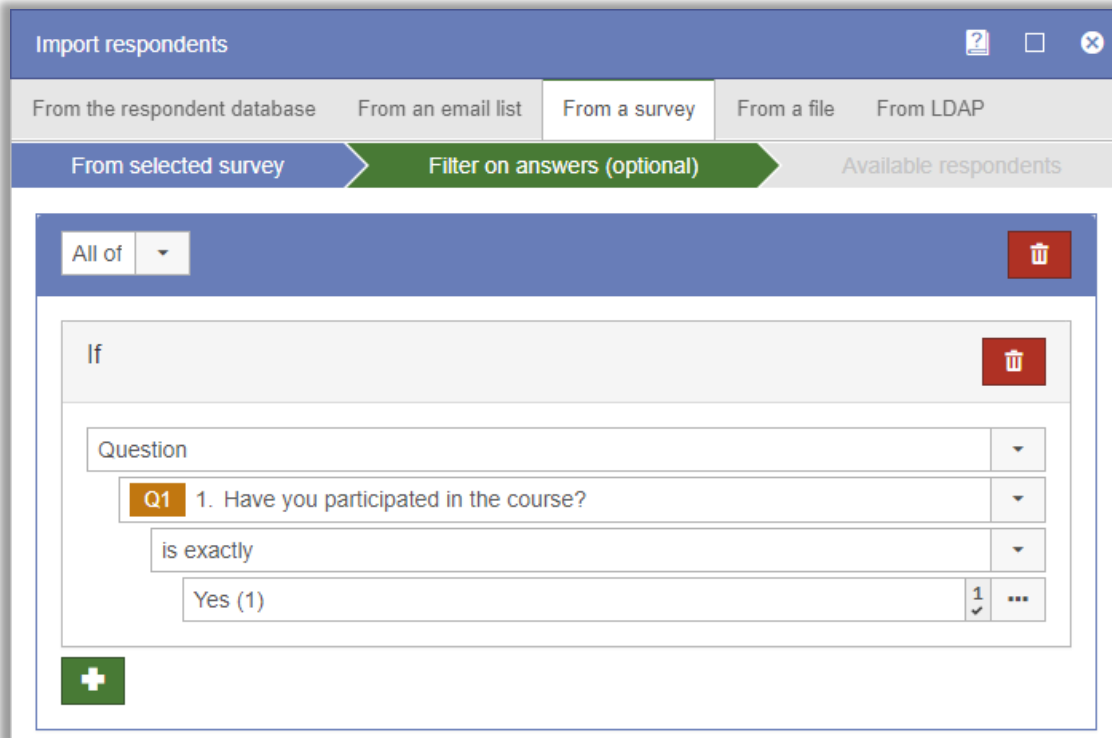
The corresponding button can also be found in the dataset of reports. Please note that the setting you make applies to everyone who has access to the report, i.e. even users who do not themselves have the right to see unsubmitted answers.

Answer status
Submitted answers

All answers
 Submitted answers
 Unsubmitted answers

Import respondents based on answers on previous surveys

When you are importing respondents to a survey, you can choose to import them from a previous survey. In the import wizard, after selecting survey, you now come to the step *Filter on answers (optional)*. If you only want to import respondents who answered the survey in a certain way, you can filter on answers here. You perform the filtering by creating a condition. The condition is created in the same way as a condition in a branching logic. If you click *Next* without defining any condition, all survey respondents will be listed.

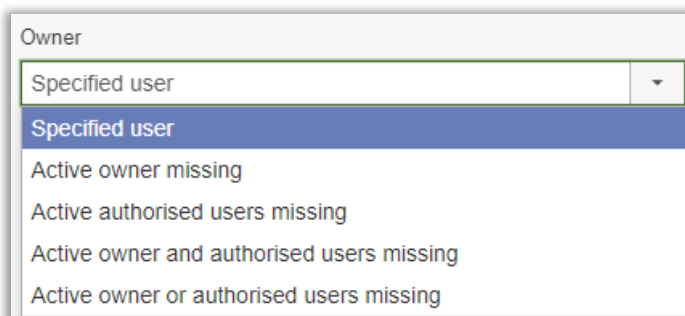


Manage surveys – filter on surveys lacking active owner/authorised users

Under the menu *Survey > Manage surveys*, in the advanced search, you can search for surveys that do not have an active owner and/or authorised users. Surveys may lack an active owner because the previous owner has been inactivated (the name is then still displayed), anonymised (the text *[Removed User]* is displayed) or deleted (the *Owner* field is empty).

In the *Owner* drop-down list, the *Specified user* option is selected by default. With this option selected, start typing the name of the user in the *User* field and select the desired user by clicking on it.

To instead search for surveys that do not have an active owner/authorised user, select one of the options below.



Administration

New interface for deleting/anonymising respondents

The interface for removing or anonymising respondents has been improved. It is now possible to delete respondents who are linked to surveys from the respondent database.

First, select desired respondents and then click the *Delete/Anonymise* button.

Select action in the first step of the wizard:

- *Anonymise*: The respondent remains as an anonymised entry in the respondent database.
- *Delete*: The respondent is completely deleted from the respondent database.

In the second and third steps of the guide, you choose what should happen to any respondents who are linked to active and not active surveys:

- *Leave intact*: This means that respondents connected to surveys will not be anonymised or deleted.
- *Remove from survey*: The respondent disappears from the survey's respondent list. The answers are affected as follows:
 - Active non-anonymous respondent surveys: The respondent's answers are also removed
 - Closed non-anonymous respondent surveys: The respondent's answers remain
 - Anonymous surveys (regardless of status): The respondent's answers remain
- *Convert to survey-specific*: The survey respondent is converted to a survey-specific copy of the respondent with identical data.
- *Convert to survey-specific and anonymise*: The survey respondent is converted to a survey-specific respondent that retains the respondent's respondent categories while all other fields are anonymised.

Click *Finish* to complete the action.

Custom automation for managing surveys

Under the new menu *Administration > System > Custom automation*, you can automate the handling of surveys, e.g. that surveys without owners and authorised users should be placed in the recycle bin or that surveys that have been in the recycle bin for a certain number of days should be permanently deleted. If you have the plug-in module SR-Panel, you can also create automations that manage panel members.

You specify the interval at which the automation should run, e.g. every day or every week, but you can also run an automation manually by clicking the *Run task* button.

In the automation, you add one or more steps to be performed. The automation step for *Manage surveys* is defined as a condition that decides which surveys should be affected and one or more actions to be performed on those surveys.

As a condition, you can use the following criteria:

- *Survey name*: *contains, ends with, equals, does not equal*
- *Survey type*: Select one or more of the survey types *Public surveys, Respondent surveys, Respondent surveys (only anonymous), Respondent surveys (only non-anonymous)*
- *Status*: Select one or more of the statuses *Construction, Pending publishing, Active, Closed, Archived, Deleted (in the recycle bin)*
- *Survey category*: Select one or more survey categories
- *Survey template*: Select one or more survey templates
- *Owner*: Select one of the following options:
 - *has active*: The owner of the survey is active in the system
 - *lacks active*: The owner of the survey has been deleted, inactivated or anonymised
- *Authorised users*: Select one of the following options:
 - *has active*: The survey has at least one authorised user who is active in the system
 - *lacks active*

- *Created*: The survey must have been created for at least the number of days that you specify
- *Closed*: The survey must have been closed for at least the number of days you specify
- *Archived*: The survey must have been archived for at least the number of days you specify
- *In recycle bin*: The survey must have been in the recycle bin for at least the number of days you specify

The following actions can be performed:

- *Archive surveys*: Surveys with the status *Closed* will get the status *Archived*
- *Restore surveys from archive*: Surveys with the status *Archived* will get the status *Closed*
- *Move surveys to recycle bin*
- *Restore surveys from recycle bin*
- *Delete surveys permanently*: The surveys will not be possible to restore

Please note that the *Move surveys to recycle bin* and *Delete surveys permanently* actions cannot be performed on surveys that have the status *Active*.

Validation of input in respondent fields and properties

If you want to validate what is entered in the respondent information, you can, under the new menu *Administration > System > Validation expressions*, create regular expressions that determine what is allowed to be entered. This can be particularly useful in cases where the respondent is given the right to register or update his data.

You can then choose to use the expressions created in respondent data policies under *Administration > Respondents > Respondent data policy*. The validation can be used for the basic respondent information, such as email and telephone number, as well as for respondent properties.


Name

Description of valid input value ⓘ


Error message for invalid input value

Expression is case-sensitive ⓘ

Expression



▼ Respondent properties ⓘ		Visible	Editable
Respondent properties		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Exceptions			
	Validation	Visible	Editable
Employee number	Employee number ▼	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 

Advanced selection – combined search

In interfaces where you can search for respondents, e.g. under *Administration > Respondents* and under *Survey > Distribution > Respondents*, you can, in the *Combined search* drop-down list in the advanced search , create advanced selections where you combine desired respondent fields and respondent properties.

For each selection, select the desired criterion (field or respondent property), enter a search string, and select the desired option from the following:

- *is exactly*
- *is not exactly*
- *is greater than*
- *is greater than or equal*
- *is less than*
- *is less than or equal*
- *contains*
- *does not contain*
- *starts with*
- *ends with*
- *is between*
- *is not between*

To add another condition, click the  icon. You can also click the  button to add a group of conditions within the condition. You can do this if you want an "AND relation" between some conditions and an "OR relation" between others.

Once the second condition has been added, select the desired option in the drop-down list above the conditions:

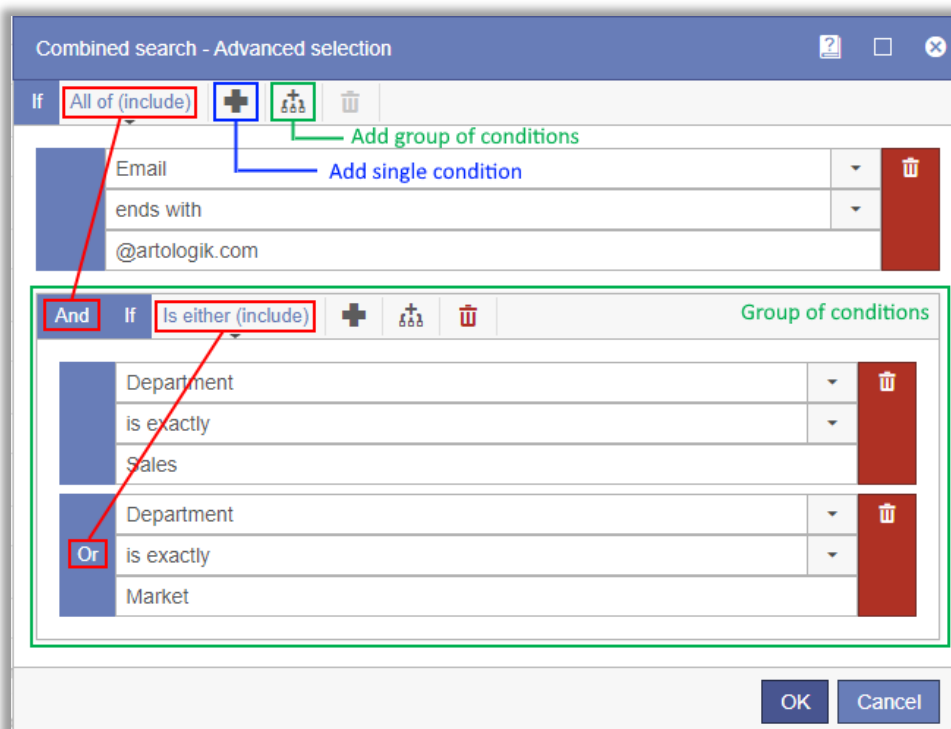
- *All of (include)* - Include respondents who match all conditions
- *Is either (include)* - Include respondents who match at least one of the conditions
- *All of (exclude)* - exclude respondents who match all conditions
- *Is either (exclude)* - exclude respondents who match at least one of the conditions

In the example below, *All of (include)* is selected at the top of the main condition. This means that there is an "AND relation" between the initial condition "Email ends with @artologik.com" and the subsequent group. In the group of conditions, *Any of (include)* is selected, which means that an "OR relation" is applied within the group. The entire condition can thus be read as:

"Email ends with @artologik.com"

AND

"Department is exactly Sales" OR "Department is exactly Market".



New plug-in – SR-Panel

If you wish to direct surveys to a fixed panel of respondents, the new plug-in SR-Panel may be of interest. Here is a selection of the possibilities available:

- Allow people to register themselves as panel members
- Ensure that only invited people can register by using invitation codes
- When members log in to the panel, they can, from the start page answer the current panel surveys
- Create a layout for the public part of the panel in accordance with your graphic profile
- Enter texts to be displayed on the different pages in the public part of the panel
- Ensure members enter the correct email address by using email verification with activation link
- Allow panel members to reset their password
- Allow panel members to pause their participation in the panel or leave the panel
- Let panel administrators manage panel members manually, or create automations for it

Feel free to contact us by email, phone or the [form on artologik.com](https://artologik.com) to learn more.