Dapresy Pro 9.1 – Technical release notes

Index

1 Introduction

This document describes new and improved features in Dapresy Pro version 9.1

- Chapter 2 describes news in Data administration
- Chapter 3 describes StoryTeller improvements
- Chapter 4 describes Event Server improvements
- Chapter 5 describes Form improvements
- Chapter 6 describes improvements in the Invite module

If you want to know more about these features, please contact Dapresy Global Support at: support@dapresy.com and they will be able to assist you.

Best Regards,

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2 Data Administration

The following improvements have been made to the data administration process in Dapresy Pro.

- Improved performance - bigger data files are now supported
- Support for using multiple import schedules
- New capability to validate case data during data load
- Support for scheduling data exports
- Support for updating parts of existing data through an additional data import
- Use of “current date” compute variables

2.1 Improved performance

The import logic has been improved so that bigger data files can now be imported into Dapresy Pro. Recent tests prove that users can now import data files that are approximately 4 times larger than the previously supported size.

Unfortunately, a fixed limit of the maximum file size cannot be defined as it depends on many parameters, such as the number of respondents, number of variables, number of variables each respondent has answered, type of variables, etc. So in cases where the data files are larger than approximately 150-200 mb, it is still suggested to separate those into multiple files before importing them into Dapresy Pro.

Note: This improvement only refers to the ability to upload bigger data files. The limitation within a project (sum of all uploaded data files), is still 100 million cells (number of variables x number of respondents).

2.2 Support for using multiple import schedules

In many projects, multiple types of data sources are used, such as survey data from different data collectors, media spending values, shipment data, etc.

In ongoing projects, the key to effectively streamlining a process is to use the “Import Scheduler” which automatically imports data files from FTP servers without any manual steps.

In the previous version, Dapresy Pro supported one setup of an “Import Scheduler” per project. So, in cases where data had to be imported from different sources or in different formats, that could not be done automatically.

To support the needs, the "Import Scheduler" has been updated to support multiple schedules. As each schedule is setup separately, different settings can be used per schedule, like different FTP servers, different update intervals, different Meta Data transformations, etc.

To get full support in the data activation process when using multiple import schedules a "Tag" logic has been implemented. This makes it possible to use different activation logic for different data sources. See two examples below.

Example 1:
A project contains survey data and sales data.

- Survey data should be imported to the project once a week. Each survey data file contains the new respondent only (e.g. the respondents from the last week).
- Sales data is imported once a month. Each sales data file contains new and historical data.

During the automatic data activation process, the following must happen:

- Survey data import: The new survey data file is appended to existing survey data (all existing survey data sets and the new data set should be activated). The sales data should be activated like before.
- Sales data import: The existing sales data set should be inactivated, and the new sales data set should be activated. The survey data files should be activated like before.

Example 2
A project should be loaded with data once a week.

- Each data file will contain both new and old respondents (data from 2014 and forward).
- In the initial setup of the project, historical data was loaded in one data file (data before 2014).

During the data activation process, the following must happen:

- The existing data sets with data from 2014 should be inactivated. Only the new data set should be activated.
- The historical data set should be activated just like before the import.

By using the "Tags" in both examples above, the defined activation behavior in the "Import Scheduler" only effects the data sets with the same Tag. Other data sets will not be effected (the ones

that were activated will still be activated, and vice versa). So in both examples above, two different tags are used to solve the needed process.

2.2.1 Tags

As explained above, the Tags are used for activating needed data files when multiple data sources with different behaviors have been used.

The chapters below describe how to create and assign Tags to data sets, and how to use the Tags during the data activation.

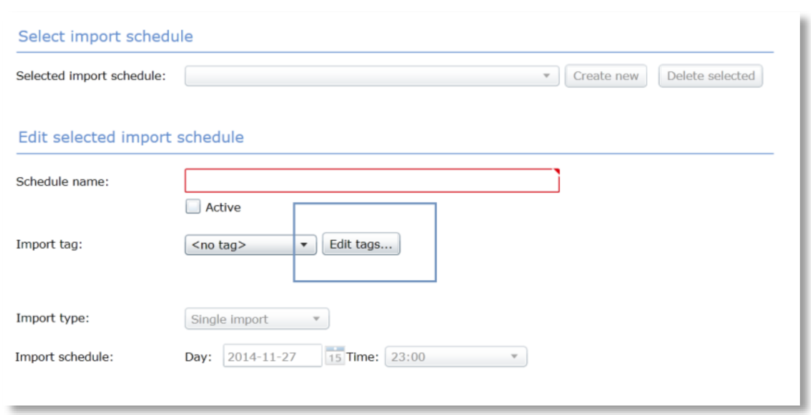
2.2.1.1 Create, Edit, and Delete Tags

Tags can be created in two pages within Dapresy Pro: the Import Scheduler page and the Data Import page (in the tab “Import” only, not in the “Quick Import” tab).

The logic is the same in both places. Click “Edit Tags” (see image 1 below) and a popup window will appear for creating, editing, and deleting Tags.

- To create a new Tag, enter the name, and then click “Add New.”
- To rename a Tag, select the Tag in the list, enter a new name, and then click “Rename.”
- To delete a Tag, click the “Delete” icon on the Tag.

Image 1 and 2: Shows where to find the “Edit Tags” button used for creating, editing, and deleting tags in the Import Schedule page and the Import Data page.



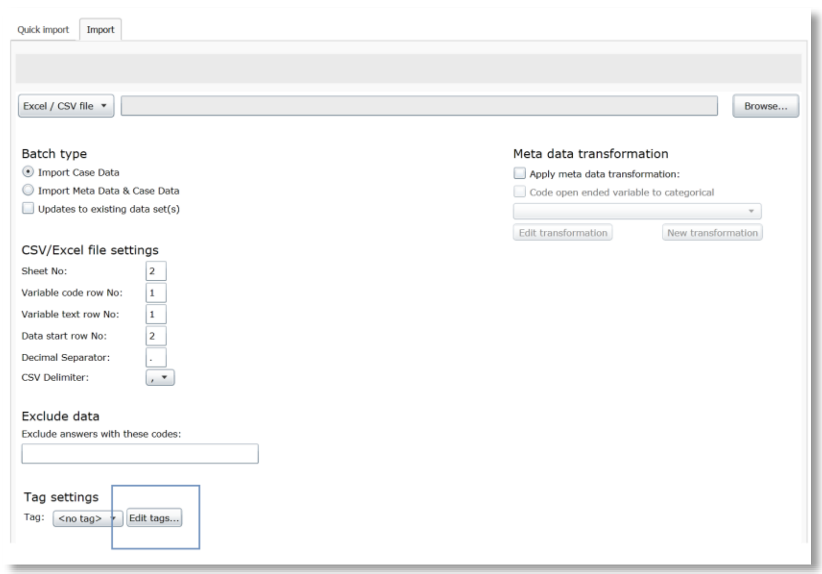
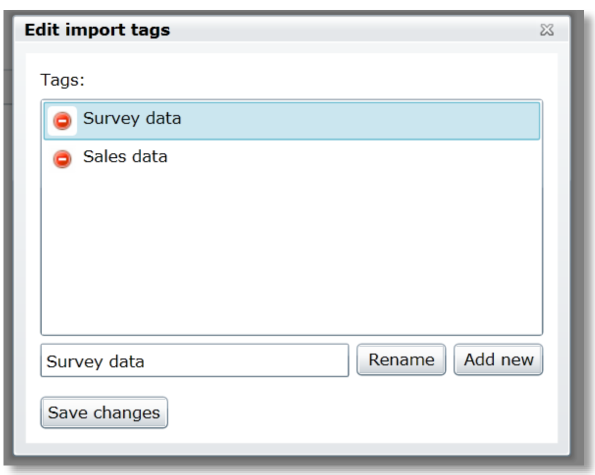


Image 3: Shows the Tag management window that appears when you click "Edit Tags" in the images above.



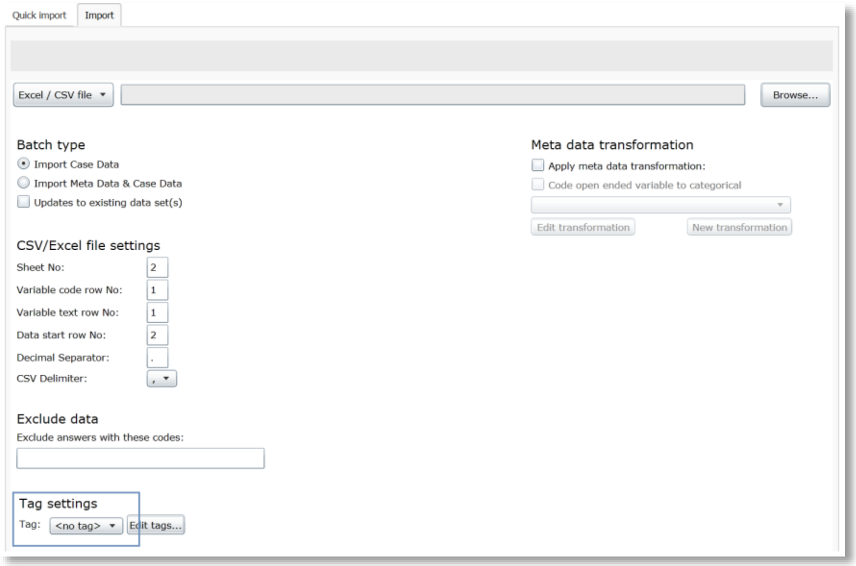
2.2.1.2 Assign Tags to data sets

Tags can be assigned to data sets in three places:

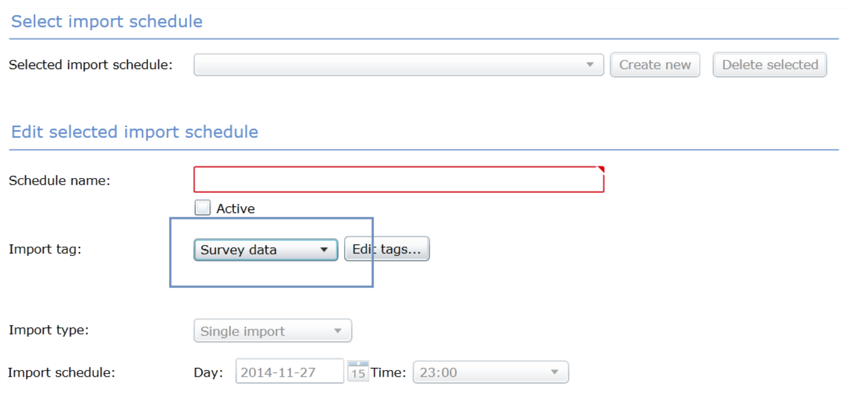
1. In the Data Import screen
2. In the Import Scheduler screen
3. In the Activate Data screen

To assign a Tag to a data set that is going to be imported, select the Tag from the selection lists shown in the image below. If no Tag should be assigned, select "No Tag."

The images below show the Tag selection lists in the Data Import screen.



The Image below shows the Tag selection list in the Import Scheduler screen. All files imported by the current Import Schedule will get the Tag "Survey Data" in this example.



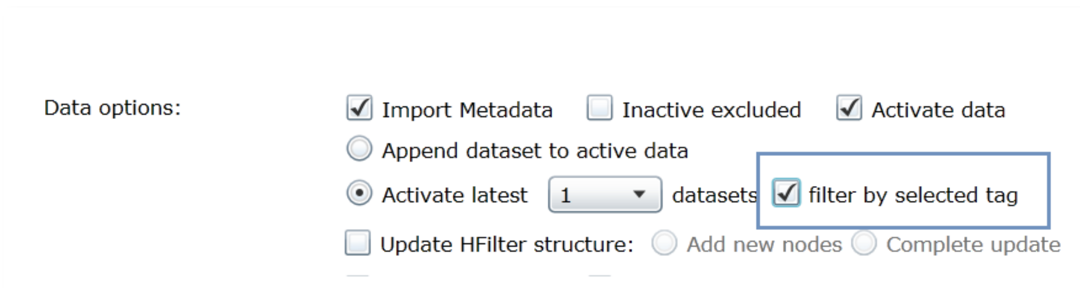
To change the Tag of an already imported data set, or to add a Tag afterwards, go to the Data Activation page and follow these steps:

1. Click “Edit” in the farthest right column
2. Select new Tag in “Import Tag” column
3. Click “Update” in farthest right column

Note: New Tags cannot be created in the Data activation page, only in the Import Scheduler page and the Data Import page (in the Import tab).

2.2.1.3 Use Tags in data activation

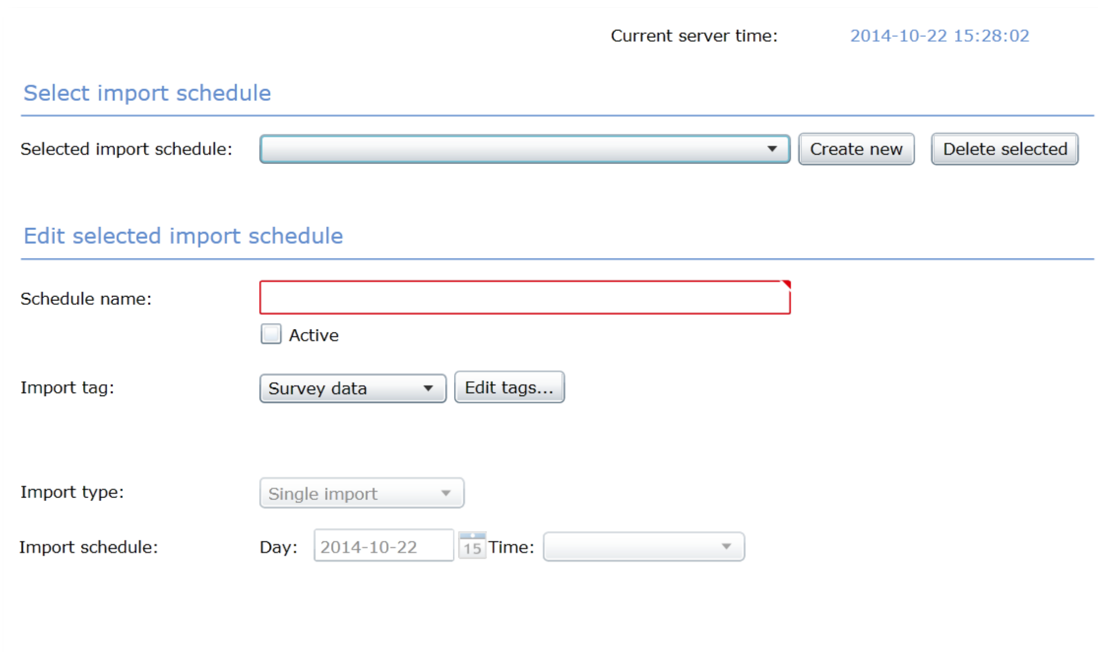
If the Tags should be used during data activation in the Import Scheduler, check the option highlighted in the image below. If this option is checked, only data sets with the same Tag as the current schedule will be effected during data activation.



2.2.2 Setup of Multiple Import schedules

The setup of multiple Import Schedules is made in the existing screen in the top area. As default, all projects will have one empty Import Schedule created from the beginning.

The image below shows the new controls in the top area for managing multiple Import Schedules.



- To select an Import Schedule, use the selection list “Selected import schedule.”
- To create a new Import Schedule, click “Create,” enter a name in “Schedule name,” and continue with setup as usual.
- To delete an Import Schedule, simply click Delete.

2.2.2.1 How to think when setting up multiple Import Schedules

Some restrictions have been added in this first version of multiple Import Scheduler support. These restrictions are relevant if you use multiple Import Schedules where data should be imported at the same time in two or more schedules.

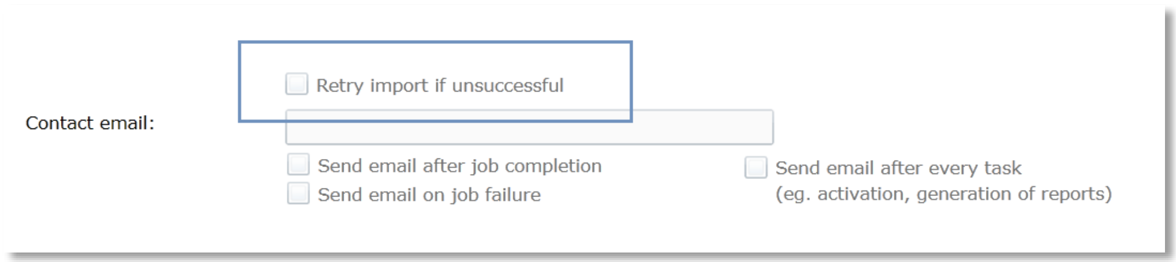
Two or more Import Schedules cannot be setup for the same start time. So, in cases where two data files should be imported at 00:00 every night, one needs to be scheduled at 00:00, and the other one scheduled at 00:15.

Note: If reports should be pre-generated in the example above, this should only be setup in the second Import Schedule. There is no need to pre-generate reports in the 00:00 schedule if more data is supposed to be imported.

Note 2: If the first data import/data activation runs for more than 15 minutes (in the above example), the second one will not be started, since only one can run at a time. This is solved by using the function

“Retry import if unsuccessful.” By using this setting, the second data import will try to start again every 5 minutes for the next two hours.

The image below shows the option “Retry import if unsuccessful.”



2.3 New case data validation in data upload

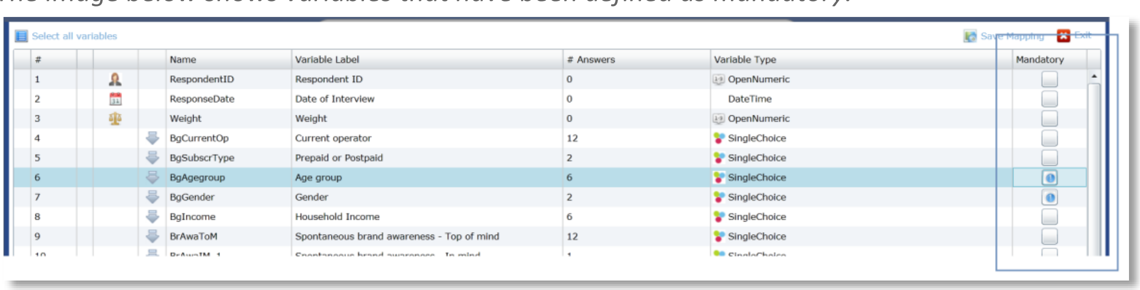
The Meta Data transformation service has been improved. It is now possible to validate the case data during the upload in order to ignore respondents that do not have data in “mandatory variables.”

The validation can be used in both the manual data import and the automated process (Import Scheduler).

2.3.1 Setup

The definition of mandatory variables are made in the Meta Data transformation. To define a variable as mandatory, right click on the desired variable and select “Mandatory variable.” A variable defined as mandatory is shown with an icon, just like in the image below.

The image below shows variables that have been defined as mandatory.



2.3.2 Logic

The following logic is used during the validation of mandatory variables:

- Categorical variables: The respondents must have data in one answer alternative (or more)
- String variables: The respondents must have some text

- Numeric variables: The respondents must have a numeric answer
- Date variables: The respondents must have a date

The respondent ID's of the ignored respondents are shown in the successful import messages. These are in the Import page and in the emails sent out when the Import Scheduler is used.

2.4 Scheduled data exports

The raw data export support has been improved. Exports can now be scheduled to run automatically and be exported to FTP sites. The scheduling function can export files in CSV and Excel formats.

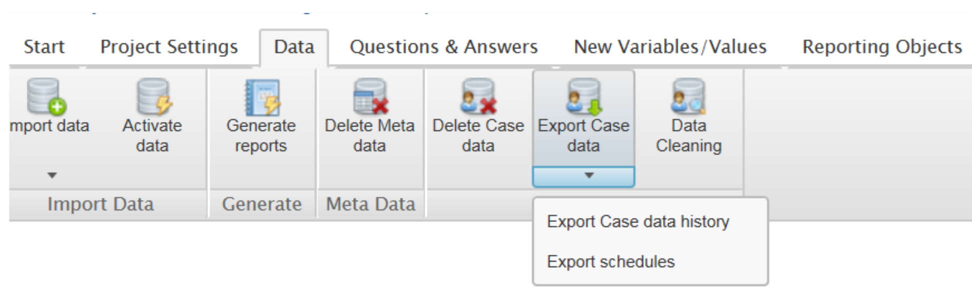
As advanced filters can be applied to the data export, it is possible to export parts of the data or for certain time periods only.

The raw data export function is similar to the Data Import scheduler function for importing data automatically. So, multiple exports can be setup in a project with different filters, different time intervals, different target FTP sites, etc.

2.4.1 Setup

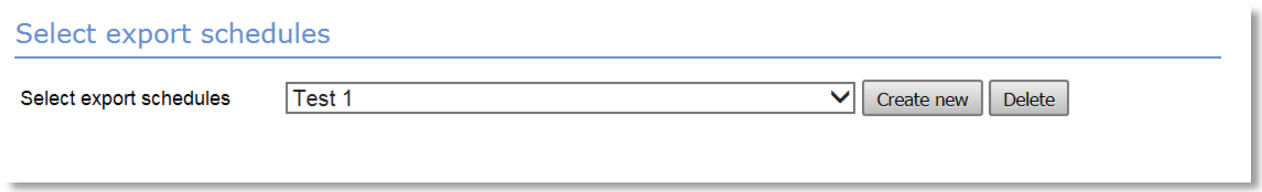
A new page named "Export schedules" has been added. It is placed as a subpage to the existing "Export case data" screen - see image below. (In the future, both these pages will be merged for increased flexibility and usability).

The image below shows where to find the new page.



The logic and the user interface of the setup should be similar to the Import scheduler screen. This means that the Administrator can create multiple Export schedules with different settings in each schedule. The select, create, and delete options are positioned at the top of the screen, as shown in the image below.

The image below shows the top areas used for creating, selecting, and deleting Export Schedules.

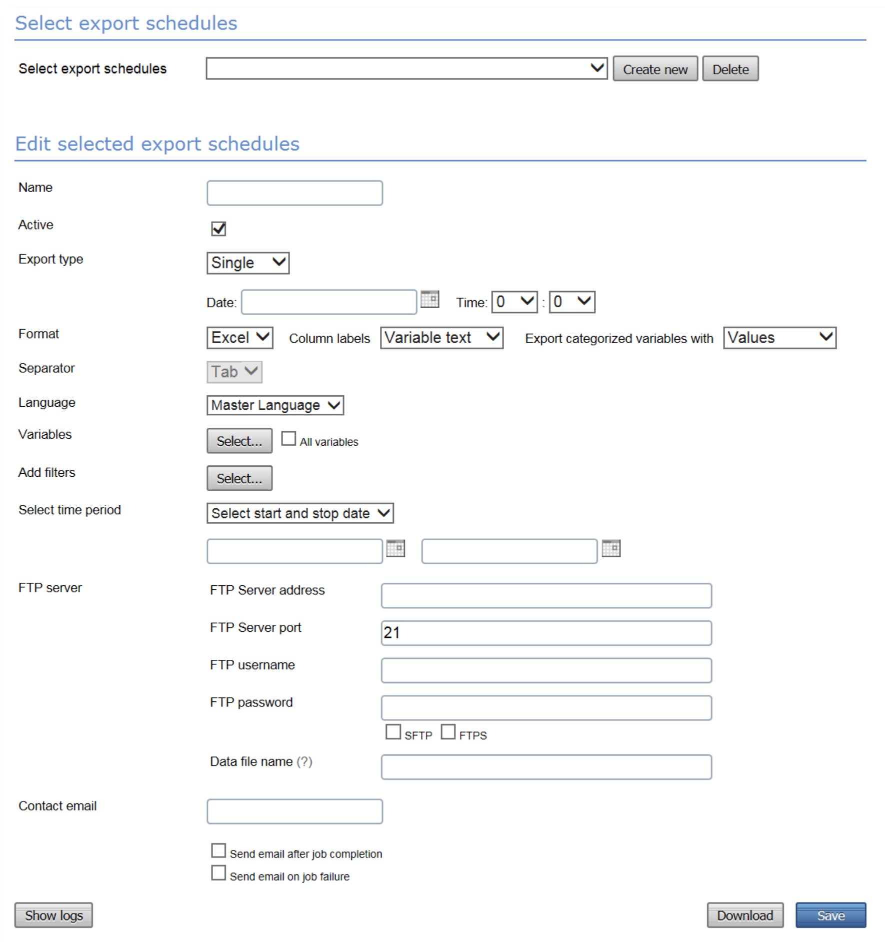


- To select an Export Schedule, use the selection list “Selected Export schedule”
- To create a new Export Schedule, click “Create new.” Enter a name in “Schedule name,” and continue with setup as usual.
- To delete an Export Schedule, simply click “Delete.”

When defining the content and behavior of the Export Schedule, the following settings needs to be made:

1. Name
2. If it is active or not
3. Time and interval
4. Data Format
5. Language (if the project contains multiple languages)
6. Variables to include
7. Filters
8. FTP details
9. Contact emails

The image below shows the new Export Schedule page.



Name

The name of the schedule is entered in the 'Name' field.

Active

Just like in the Import scheduler, a schedule can be Activated/Non-activated. If the schedule is not active, no files are sent out.

Time and interval

The time and interval need to be defined. The interval can either be single occasion, weekly, or monthly.

- If Single occasion; select a date and time.
- If Weekly; select weekday(s) and time.
- If Monthly; select a date and time.

Note: The time is based on the server time, not on the current time zone of the logged in user.

Data format selection

In this first version of the Import Scheduler, Excel and CSV files are supported. Select the needed data format in the selection list “Format.” If CSV is selected, choose between the following separators;

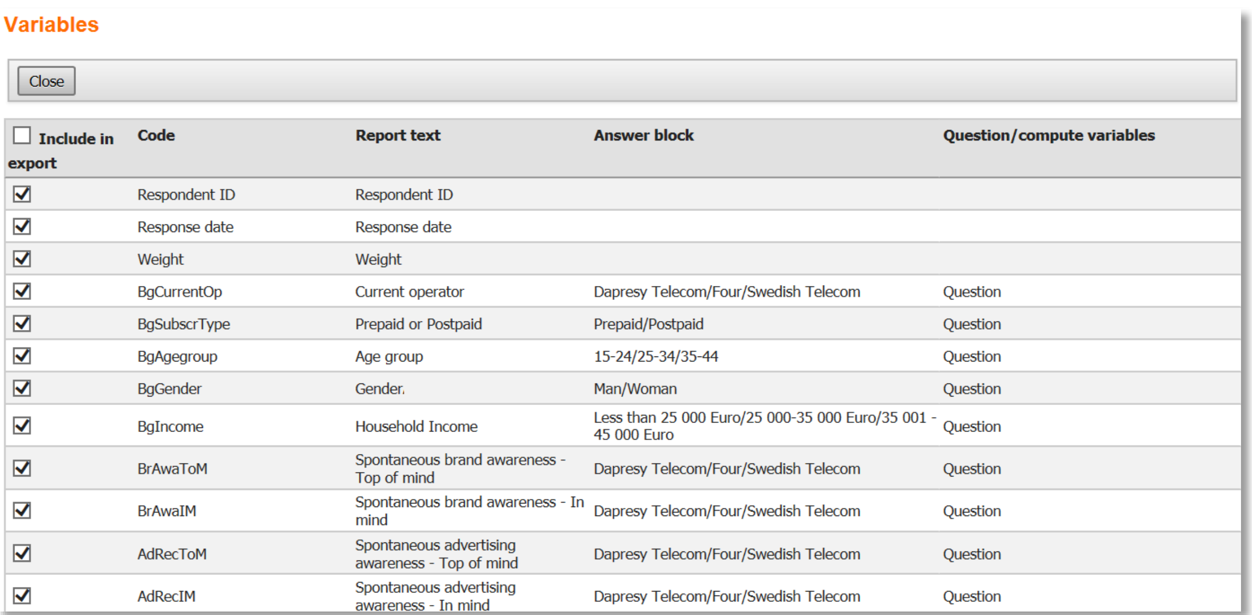
- Tab
- ,
- ;

Variables

Define which variables to include in the export. All types of variables in the project can be inlcuded, except for Index varibales. If a variable contains “Grouped answers,” it is not included either. These exceptions are made as these variables do not follow the ordinary data structure.

To include all variables, tick the check box “All variables.” To only include some variables, untick the checkbox “All variables,” click ”Select…”. In the popup window shown, tick the variables to include in the export.

The image below shows the pop-up window for selecting variables in the export. Click the column headers to sort the table ascending/descending.



Variables

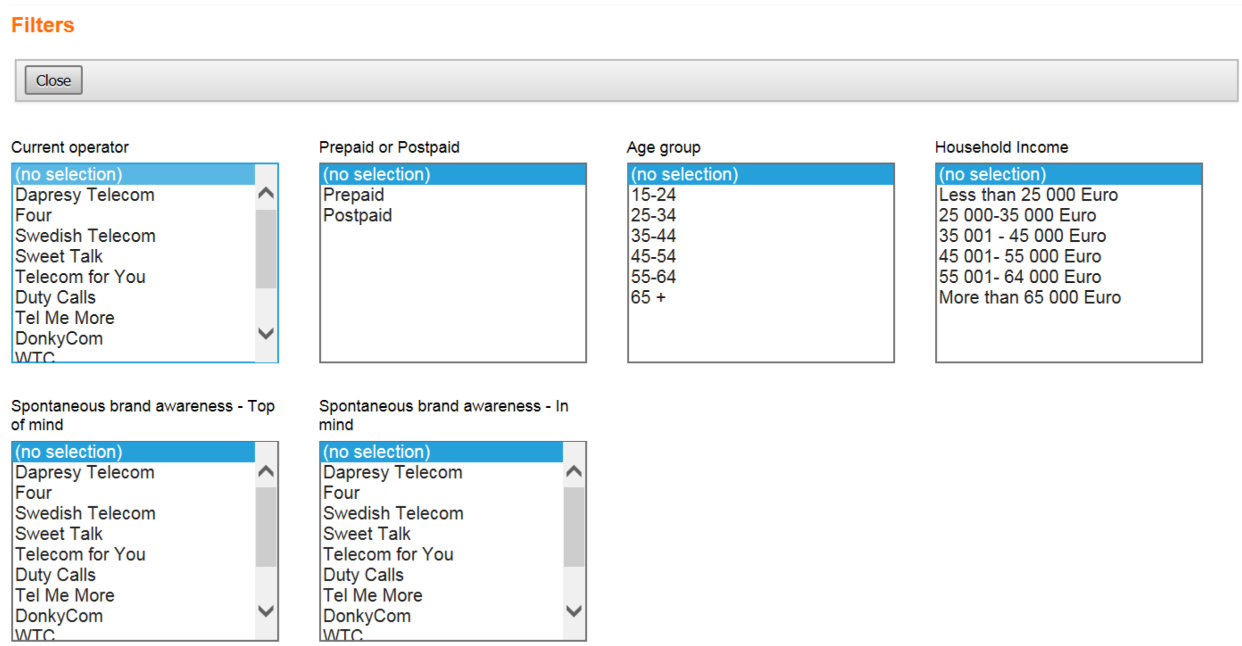
Close

Include in export	Code	Report text	Answer block	Question/compute variables
☑	Respondent ID	Respondent ID		
☑	Response date	Response date		
☑	Weight	Weight		
☑	BgCurrentOp	Current operator	Dapresy Telecom/Four/Swedish Telecom	Question
☑	BgSubscrType	Prepaid or Postpaid	Prepaid/Postpaid	Question
☑	BgAgegroup	Age group	15-24/25-34/35-44	Question
☑	BgGender	Gender.	Man/Woman	Question
☑	BgIncome	Household Income	Less than 25 000 Euro/25 000-35 000 Euro/35 001 - 45 000 Euro	Question
☑	BrAwaToM	Spontaneous brand awareness - Top of mind	Dapresy Telecom/Four/Swedish Telecom	Question
☑	BrAwaIM	Spontaneous brand awareness - In mind	Dapresy Telecom/Four/Swedish Telecom	Question
☑	AdRecToM	Spontaneous advertising awareness - Top of mind	Dapresy Telecom/Four/Swedish Telecom	Question
☑	AdRecIM	Spontaneous advertising awareness - In mind	Dapresy Telecom/Four/Swedish Telecom	Question

Filters

To filter the export, click the “Filters” button. Select the filter(s) to apply to the export. Only respondents fullfilling the defined filter selection will be included in the export.

The image below shows an example of the Filter selection. Just like in the chart and table setup in Dapresy Pro, multiple selection within a box is treated as OR, and if doing selection in multiple boxes, it is treated as AND.



Time period

In the Time period selection, it is possible to add a date filter to the export to only export last week's data, last 3 month's data, etc. The time period selection uses the same logic as when setting up charts and tables. Select from:

- Full period
- Last X days, weeks, months, quarters, and years
- Year to date
- Select a start and stop date for exporting a custom time period

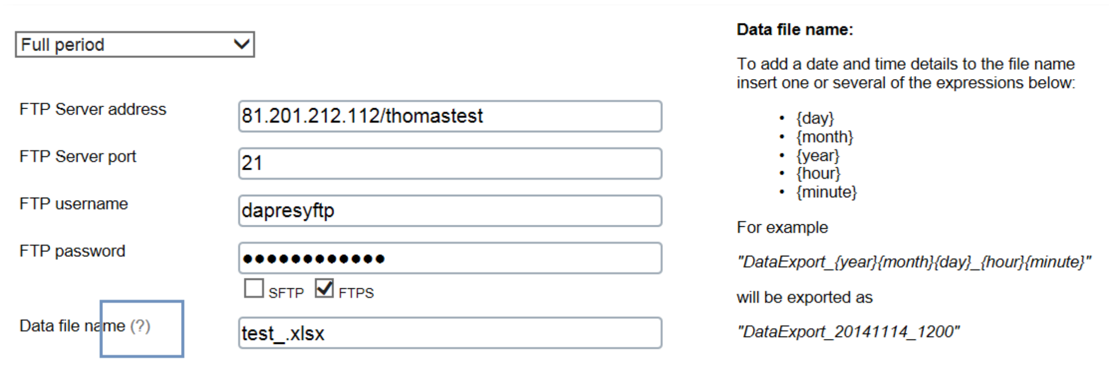
FTP details

In the FTP details section, the FTP credentials are defined. The following needs to be entered:

- FTP server address
- FTP server port
- FTP username
- FTP password
- Security: Secure FTP or FTPs (tick the check boxes if the FTP is any of those types)

The name of the exported file is defined in the text field “Data file name.” A time stamp can be added automatically to the file name during the export by using the tokens shown in the image below.

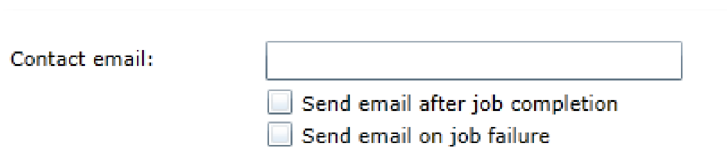
The image below shows the tokens that can be used to add date/time stamp to the file name. To view the information to the right in the image below click the highlighted question mark.



Contact email

To get an email notification every time the Export is completed or on failure, enter the email address in the “Contact email.” Multiple email addresses can be added. Simply insert a ; between each address.

The image below shows the Contact email field.



2.4.2 File formats

The list below shows some general points about the exported file format:

- The sort order in the file is based on the sort order of the variables in the project.
- The imported ID’s of the variables are shown as column headers.
- Multiple-choice variables are exported as multiple columns, one column per answer option. If the answer options are shown as value IDs, the ID “1” is used for each answer alternative. It is the same logic from the data import of Excel and SPSS files.
- The decimal separator is picked up from the General project settings.
- The date format defined in the Project settings page/Custom date tab, the selection box “Day” is used.

2.5 Support for updating parts of existing data

The data import logic has been improved to support a process where existing respondent data can be updated afterwards by making an additional data import, containing the updates only.

The new logic can be used in many scenarios. Below are three examples:

- To update incorrect data in a project with many data sets: Instead of importing all data files once again, which is time consuming; one data file that only includes the concerned respondents is imported.
- In cases where special indexes, etc. are calculated outside Dapresy Pro and imported as respondent level data, those values can be imported in separate files so that all data does not need to be imported again.
- In cases where more background data needs to be imported at a later time, for example, in a customer satisfaction survey, only the new variables need to be imported.

Example:
The originally imported data set looks like the first data table below. As shown, the Segment variable is missing data in a few rows. A new data set is imported which includes the missing data as shown in the second data table below.
During the data import, the second data set is defined as "Update to existing data set(s)," so the second data set will not act as a new data set, it will only update the existing data sets in the project. The third data table below shows the result of these two imported data sets after data activation.

The image below shows the 3 different data tables from the example above.

Original data set

RespondentID	Age	Segment	Company	Recommend
1	35		Nike	7
2	61		Puma	8
3	24		Converse	6
4	54		Puma	9

Original data set

RespondentID	Segment
1	A
2	C
4	A

Result

RespondentID	Age	Segment	Company	Recommend
1	35	A	Nike	7
2	61	C	Puma	8
3	24		Converse	6
4	54	A	Puma	9

In the example above, the Respondent ID variable has been used as the mapping key during the mapping process between data sets 1 and 2. The variable to use is flexible, it does not need to be the Respondent ID; it can be any variable in the project. It does not need to be a unique variable either. For example, if importing a file as "Updating existing data set(s)" with two columns (like in the example below) and using the "Team" variable for the mapping between the data sets, all respondents in "Team 1" will get the value 22 in the Index A variable.

The table below shows an example where one row can update multiple respondents in a project.

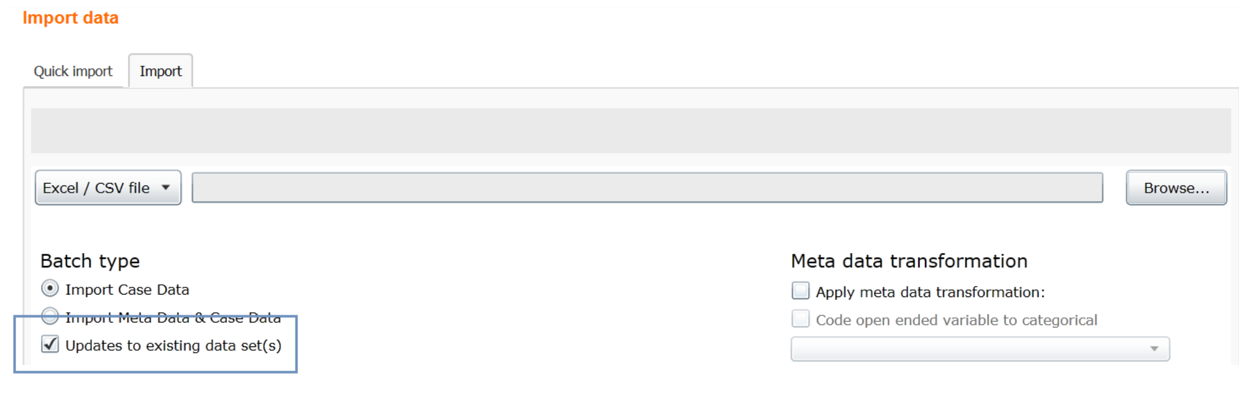
Team	Index
Team 1	22
Team 2	14
Team 3	19

2.5.1 Setup

2.5.1.1 Data Import

In both the Data Import screen and the Import Scheduler screen, the Administrator needs to define whether or not the current import is an "Updates to existing data set(s)." If the import contains updated data, the checkbox named “Updates to existing data set(s)” needs to be ticked. If the data set is a new, regular data set, the checkbox should not be ticked. The latter is also the default value.

The image below shows the new controls used to define whether or not the import contains updates to existing data. The same controls are also present in the Import Scheduler page.

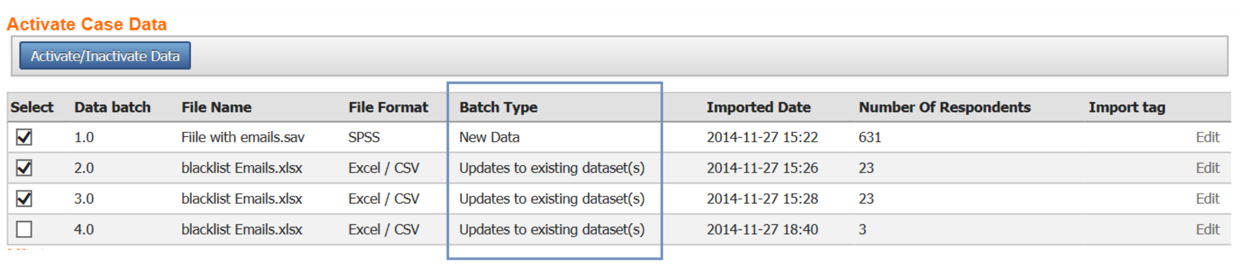


If the import is defined as “Updates to existing data set(s),” the Administrator needs to point out which variable to use as the mapping key. This will be used in the matching process between the original data set(s) and the newly defined data set(s). The Respondent ID variable is the default mapping key.

2.5.1.2 Data activation

In the data activation page, it is shown whether or not the data set is an “Updates to existing data set(s).” These data sets are active in the same way as other data sets.

The image below shows the data activation page.



Select	Data batch	File Name	File Format	Batch Type	Imported Date	Number Of Respondents	Import tag	
☑	1.0	Fiile with emails.sav	SPSS	New Data	2014-11-27 15:22	631		Edit
☑	2.0	blacklist Emails.xlsx	Excel / CSV	Updates to existing dataset(s)	2014-11-27 15:26	23		Edit
☑	3.0	blacklist Emails.xlsx	Excel / CSV	Updates to existing dataset(s)	2014-11-27 15:28	23		Edit
☐	4.0	blacklist Emails.xlsx	Excel / CSV	Updates to existing dataset(s)	2014-11-27 18:40	3		Edit

2.5.2 Logic used

The list below explains the logic for updating existing data with new data.

- The updates are made during Data Activation. Both the ordinary data set and the date set including the updates are necessary to be activated.

- A data set defined as “Updates to existing data set(s)” can only be updated if it was imported prior to the current data set with changes. All others imported later will not be affected.

- One data set defined as “Updates to existing data set(s)” can contain information that affects multiple data sets prior to being imported. It is not a 1-on-1 relationship between originally imported data sets and those with updates.

- One row in an “Updates to existing data set(s)” can update multiple respondents in the prior imported data sets as long as the mapping key matches the multiple respondents.

- Only the variables present in the “Updates to existing data set(s)” will be updated during data activation. E.g. If the original data set contains 20 variables, and the “Updates to existing data set(s)” only contains 2 variables, only these 2 variables are updated. The other 18 variables are not cleared/updated.

- An “Updates to existing data set(s)” can include meta data updates. This is the same logic that is used when importing a data set with new data.

- If a respondent exists in the “Updates to existing data set(s),” but not in any original imported data set, the data cannot be activated.

2.6 Use of current date in compute variables

In some project types, such as feedback management projects, it is necessary to list respondents from a certain time period based on the current date (today’s date), for example, when listing all delayed Alerts. A delayed Alert could, for instance, be an Alert older than one week, which is still in progress.

In the previous version, this could be achieved by computing a new variable by using dates in the expressions. If today´s date is 2014-10-22 and the purpose is to show respondents older than 7 days, the following expression could be used in a computed variable to get the correct respondents:

♮1100000000001-Response Date♮="2014-10-15"

However, in ongoing projects updated with data once a day, it is time consuming to update the expression manually every day. The new “current date” function has been added to streamline the process and remove manual updates.

2.6.1 Setup

The “current date” logic can be used when computing new categorical variables. The “current date” is used in expressions in the same way as “fixed dates,” but instead of entering a fixed date, the expression #CurrentDate# is inserted. It can be inserted together with formulas such as (–) and (+), as shown in the examples below.

Examples of expressions:

1. ♮1100000000001-Response Date♮="#CurrentDate#"
2. ♮1100000000001-Response Date♮<”#CurrentDate#”
3. ♮1100000000001-Response Date♮ <”#CurrentDate# – 7”

If the current date* is 2014-10-19, the examples above should contain the following data:

1. All respondents with response date = 2014-10-19
2. All respondents with response date < 2014-10-19
3. All respondents with response date < 2014-10-12

*Note: The Current Date is updated during data activation and when compute variables are being saved/updated. So the use of Current Date is preferably only used in projects that are being updated with data once a day to get meaningful data.

3 StoryTeller Updates

The following updates have been made in the StoryTeller:

- Custom formatting in Respondent data tables
- Use of multiple Date variables in Respondent Data table
- Improved Optional Filters for custom selected time periods
- Emailing report
- Print reports

3.1 Custom formatting in Respondent data table

The Respondent data table has been improved to support custom formatting of respondents/cells based on threshold values.

It can be used in any type of project. For example, it can be used in the feedback management process to highlight the respondents with highest priority, or in a mystery shopping project to highlight critical results.

This function supports text formatting, background formatting, and insertion of images. A critical result could, for example be highlighted in red or with a "warning icon". This function also allows you to format only the current cell, or the entire respondent based on one value only.

The image below shows the format of an entire respondent. In this example, the rows with the status "Delayed" are formatted in red, and the rows with the status "Completed" are formatted in green.

Probability to recommend	Country	Organisation
4 = Probably	Germany	Organisation name X22
5 = Definitely	**Germany**	**Organisation name X23**
5 = Definitely	**Norway**	**Organisation name X24**
5 = Definitely	**Brazil**	**Organisation name X27**
3 = Fairly likely	**Germany**	**Organisation name X28**
4 = Probably	Brazil	Organisation name X29
5 = Definitely	**Brazil**	**Organisation name X31**
4 = Probably	Colombia	Organisation name X32
4 = Probably	Norway	Organisation name X33
5 = Definitely	**Germany**	**Organisation name X34**

1 2 3 Next Last

The image below shows the format of individual cells. By formatting individual cells, different formatting rules can be applied to different variables.

Probability to recommend	Country	Organisation
4 = Probably	Germany	Organisation name X22
5 = Definitely	Germany	Organisation name X23
5 = Definitely	Norway	Organisation name X24
5 = Definitely	Brazil	Organisation name X27
3 = Fairly likely	Germany	Organisation name X28
4 = Probably	Brazil	Organisation name X29
5 = Definitely	Brazil	Organisation name X31
4 = Probably	Colombia	Organisation name X32
4 = Probably	Norway	Organisation name X33
5 = Definitely	Germany	Organisation name X34

1 2 3 Next Last

3.1.1 Setup

The setup of the custom formatting is made in the setup window of the Respondent data table. It is made in the same way as the Tables and Cross tables, where a similar function was present already.

To add custom formatting based on values, do the following:

1. Click “Formatting Rules” in the Formatting Rules panel (see image 1 below).
2. Choose to edit an existing rule or create a new one (see image 2 below).
3. If creating a new rule, the following needs to be defined (see image 3 below)
   a. Name: The name of the formatting rule.
   b. Apply To: Select what should be formatted: entire respondent or an individual cell.
   c. Variables/Answers: Define the criteria (if criteria is fulfilled, the formatting will be applied). The top dropdown list shows all variables in the current table. Select the one to use, the belonging answer values are shown in the second selection box.

      Note: If multiple answer values are selected, those are treated as OR, not as AND.

   d. Style/Image: Select the formatting style or upload an image. If an image is uploaded, it replaces the value in the table.

Image 1: Shows where to find the Formatting rules in the Respondent Data table setup.

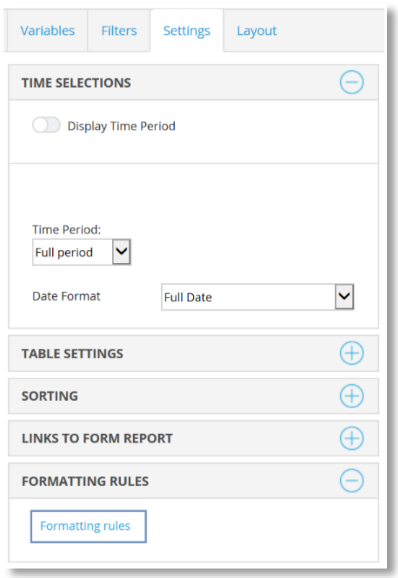


Image 2: Shows the first pop-up window. Select an existing rule or create a new one.

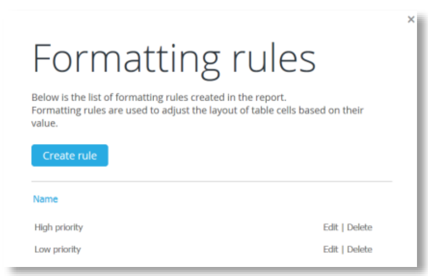
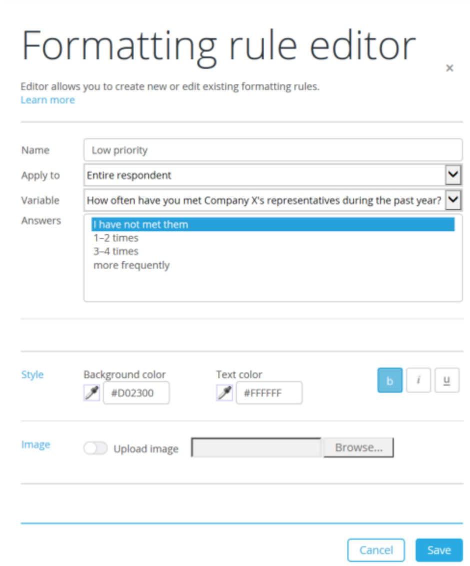


Image 3: Shows the setup window of a formatting rule.



3.2 Use of multiple date variables in Respondent Data table

In the previous version, the Respondent Data table did not support to show multiple date variables. It was only possible to show the main date variable named ResponseDate/InterviewDate.

The logic has been updated, so all date variables in the project can now be used in the Respondent Data table.

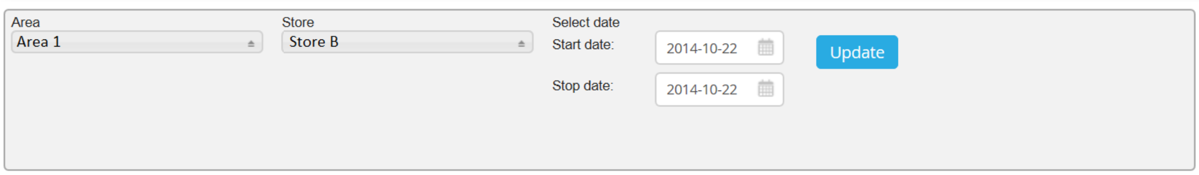
The update makes it possible to, for example, show an occasion date, an interview date, and a target date for when an alert should be closed in the same table in the feedback management process.

3.3 Custom Time periods in Optional Filters

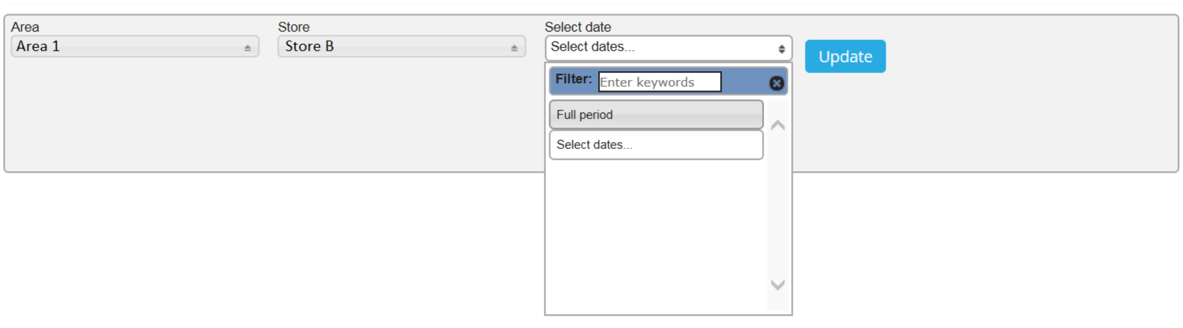
In the Optional Filter, it is possible to add "Time period" filters such as "Last 3 weeks," Last 2 Years," etc. A new option has been added which makes it possible for the report user to select a custom time period by selecting a start and stop date.

This function is great to use in all kinds of continuously running projects that show respondent information, such as mystery shopping or feedback management projects where the result needs to be analyzed for a certain date range which not has been pre-defined.

The image below shows how it looks from the report user view when the new option has been activated.

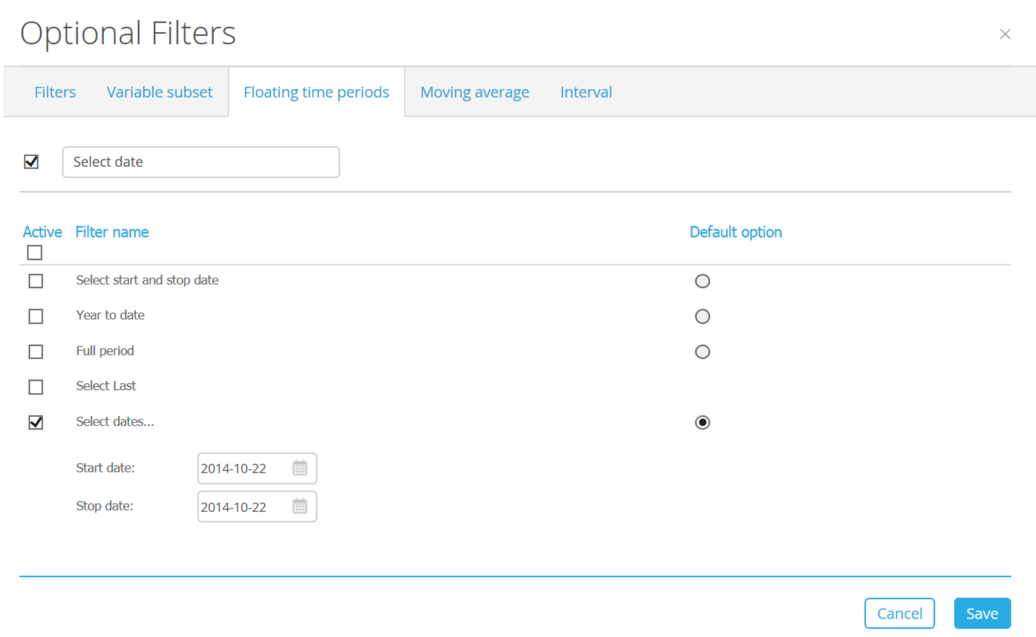


The image below shows how it looks like when the report user can select between both pre-defined time periods and custom start and stop dates. The Start/Stop date calendars are not shown until "Select dates…" is selected.



3.3.1 Setup

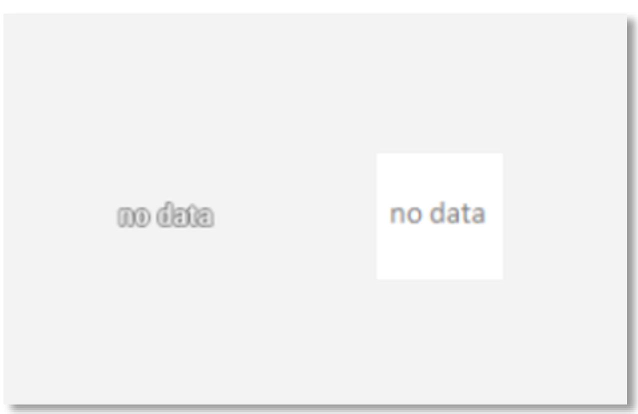
The setup is made in the ordinary Optional Filter setup page. The new option is a part of the existing "Time period" options as shown in the image below. To add the possibility to select a custom time period, select the option "Select Dates." A default start and stop date can be added if needed. If not, the default dates are blank.



3.4 New "No data" image

The image "No data," that is shown in StoryTeller when an object has no data, has been updated to fit in more layouts. Previously, the image had a white background, so it did not look good on other colored backgrounds. The new image has a transparent background as well as text available in grey and white, which makes it visible on all background colors.

The left "No data" message is the new one, and the right is the previous one.



3.5 Respondent data tables with Forms, new setting for updating charts and tables

In projects using the Form module, it is possible to connect one or several Forms to a Respondent Data table.

In the previous version, changes in Forms were reflected directly in the Respondent Data table. Therefore, if a variable that was used in the table was updated through the Form, the Respondent Data table was updated automatically when the Form was saved.

The logic has been improved to also support automatic updates of objects other than the Respondent Data table. This new logic will automatically update an object based on changes in the Form. This can be applied to tables, charts, word clouds, and dynamic images. So, in the example below, the tables showing "number of cases" can be automatically updated when the Form has been saved, if the new logic is activated.

New	In Progress	Completed
1	3	5

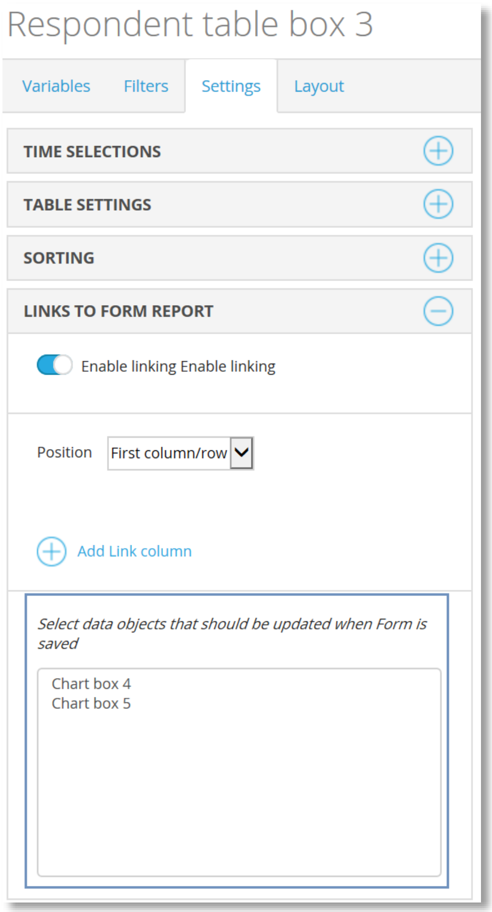
Status	Comment	Completed date	Created date	Action
New	Lorem ipsum		2014-11-28	Action
In progress	Comment text....		2014-11-28	Action
Completed	lorem ipsum	2014-11-28	2014-11-28	Action
Completed	lorem ipsum text ...	2014-11-28	2014-11-28	Action
Completed	lorem ipsum text ...	2014-11-28	2014-11-28	Action
In progress	lorem ipsum text ...		2014-11-28	Action
Completed	lorem ipsum text ...	2014-11-28	2014-11-28	Action
Completed	lorem ipsum text ...	2014-11-28	2014-11-28	Action
In progress	lorem ipsum text ...		2014-11-28	Action

3.5.1 Setup

When setting up a Respondent Data table with a connected Form, the user can define if any other objects should be updated when the Form is saved. The definition is made in the setup panel Link to Form report. In that panel, select the objects that should be updated when the Form is saved.

Note: To avoid extra waiting time and server loading, it is recommended to only update high-priority objects in the report.

The image below shows the area for selecting which objects to update automatically when a Form is being saved.


Respondent table box 3
Variables
Filters
Settings
Layout
TIME SELECTIONS
TABLE SETTINGS
SORTING
LINKS TO FORM REPORT
Enable linking Enable linking
Position
First column/row
Add Link column
Select data objects that should be updated when Form is saved
Chart box 4
Chart box 5

4 Event Server

The following updates have been made in the Event server:

- Support for adding respondent data to the email subject
- Support to filter Event email content by access rights
- Updates in Event Server page, new settings for activate/inactivate all Events

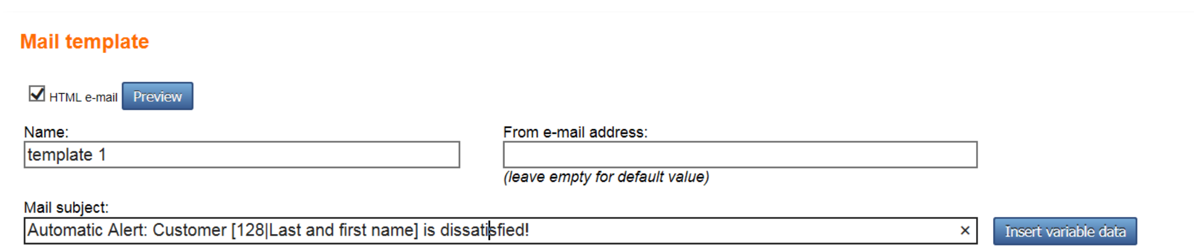
4.1 Email template update: support for adding respondent data details to email subject

In the previous version of the Event Server, respondent data could be inserted to the Event email in the email body section. The logic has now been improved so that respondent data can also be inserted into the email subject.

4.1.1 Setup

To insert respondent data into the email subject, click the “Insert Variable Data” button shown in the image below. Select the desired variable in the shown pop-up image, and click “Insert.”

The image below shows a variable that has been inserted into the email subject. The “[128 First and last name]” will be replaced with the real first and last name when the email is being sent out.



Note: When sending out event emails, it is possible to send one email per respondent, or one email including all respondents. If the option “one email with all respondents” is used, the respondent data details in the email subject will be ignored, since it could contain thousands of respondents, therefore, it would not be possible to show.

4.2 Filter Event email content by access rights

In the previous version of the Event server, access rights could not limit the content of the Event email. In cases where 100 managers in an organization should get Event emails for his/her organization unit, 100 different Events had to be setup in the previous version.

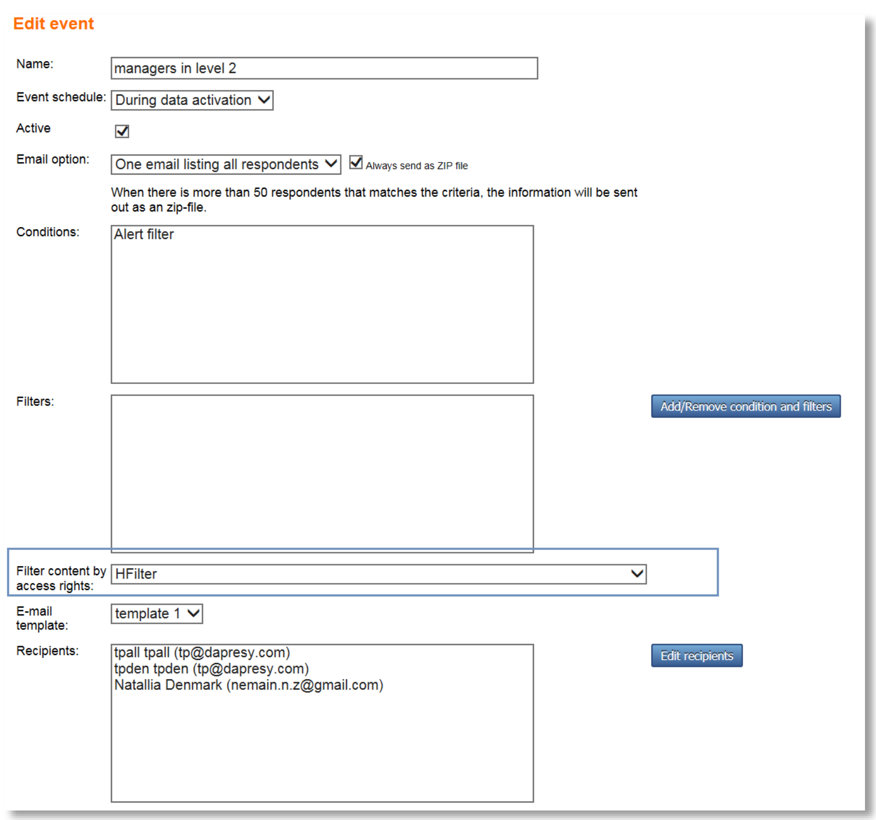
To streamline this process, new logic has been added to limit the content by access rights. So, in the above example, only one Event needs to be created instead of 100, since the Hierarchical Filter could be used as an access right filter in the created Event.

4.2.1 Setup

To add access right limitations to an Event email, the project needs to have a Hierarchical Filter or have access rights set to “normal” filters.

In projects with any of the above fulfilled, the different filters the users have access rights to are shown in a selection list, like in the image below. To limit the content per report user, select the Filter to use in that selection list.

The image below shows the new access right filter in the Event setup page.



4.3 Updates in Event Server page to activate/inactivate all Events

In the Event server page, an Activate All/Inactivate All logic has been implemented. By using these buttons, you will save time in projects with many Events.

The image below shows the new buttons in the Status column.

5 Form updates

The following improvements have been made in the Form:

- New possibility to print the Form
- Support for inserting dates automatically

5.1 Print option

A new print option has been added to the form which makes it possible to print the form, or you can save it as a document (if it's supported by the used computer).

The print option is shown in the top right corner of the form, as shown in the image below. No settings need to be activated in the project, as the option is always shown.

When the user clicks the "Print" button, a print-friendly window will appear. From there, the print is made.

5.2 Automatic insert of dates

In the Data Fields of the Form, it is possible to use Date variables for inserting dates. A new option has been added so that "Today's Date" can be inserted automatically when the Form is being saved or based on any changed data in the Form.

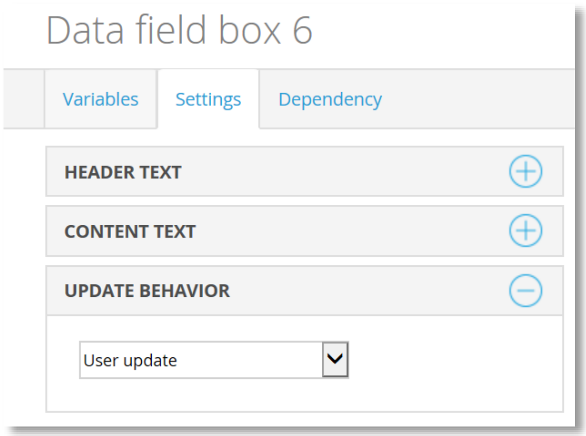
It can, for example, be used to insert a "Last Update Date" or a "Closed Date" automatically in the feedback management process.

5.2.1 Setup

A new panel has been added to the Settings tab in the Data Field setup window, as shown in the image below. The new panel appears only when the selected variable type is a Date variable. In the new panel, the update behavior is defined. The following options are present:

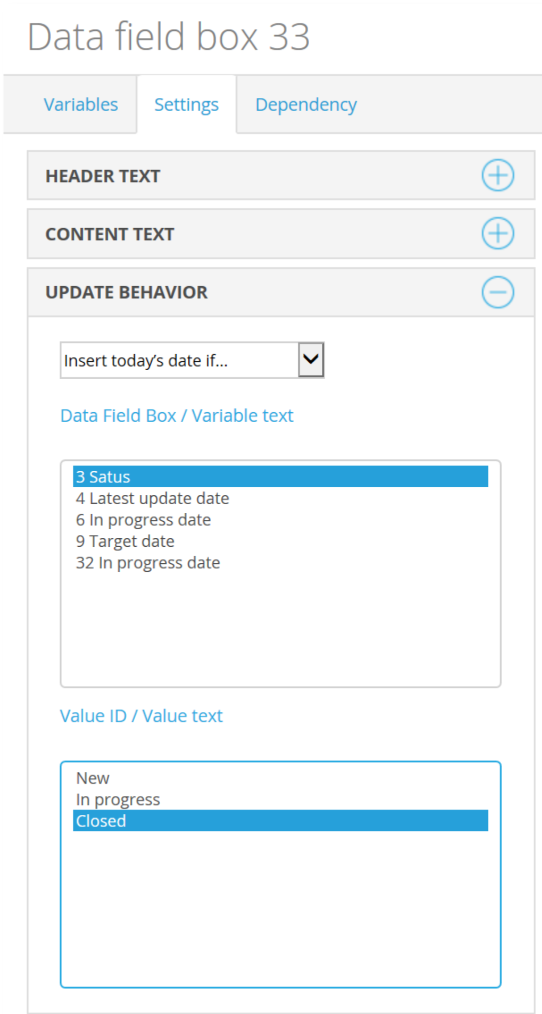
- "User update" – The user enters the date in the calendar control (this option is default)
- "Insert today's date on Save" – Today's date is inserted when the Form is being saved
- "Insert today's date if..." – Today's date is inserted when another variable in the form is being updated

The image below shows the new Update behavior selection list. "User Update" is the default selection.



If the option “Insert today’s date if...” is selected, two new selection boxes will appear, since they need definitions for what should trigger the automatic date insertions. In the top selection box, all variables shown on the same Form are listed (see image below). The corresponding answer options of the selected variable are shown in the second selection box. Select the answer option that should trigger the date update.

The image below shows an example where today’s date will be inserted automatically when the Status is changed to “closed.”


Data field box 33
Variables
Settings
Dependency
HEADER TEXT
CONTENT TEXT
UPDATE BEHAVIOR
Insert today's date if...
Data Field Box / Variable text
3 Satus
4 Latest update date
6 In progress date
9 Target date
32 In progress date
Value ID / Value text
New
In progress
Closed

6 Invite Updates

The following improvement have been made in the Invite function:

- New support for saving and scheduling invites

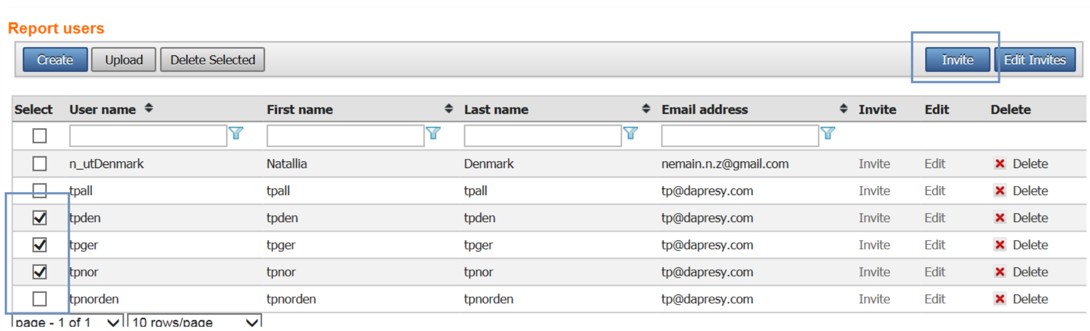
6.1 Saving and scheduling invites

New support has been added to Save and Schedule invites. By saving invites, they can be re-used in the future, which saves time. By scheduling invites, the report users in the project can, for example, be notified once a month about new loaded data in the portal.

6.1.1 Setup new invite

The invites are setup from the report user page, as in the previous version. The users that will be included in the invite are selected from the user grid. To start the setup of the invite, click “Invite” as seen in image 1 below.

Image 1: Shows the button to use for starting the setup of a new invite. To edit an already created invite, click the button “Edit Invites” in the top right corner.



The setup window that appears when clicking “Invite” has been updated since the previous version. Since more content has been added, the page has been divided into multiple tabs to make it more user-friendly. The following tabs are used:

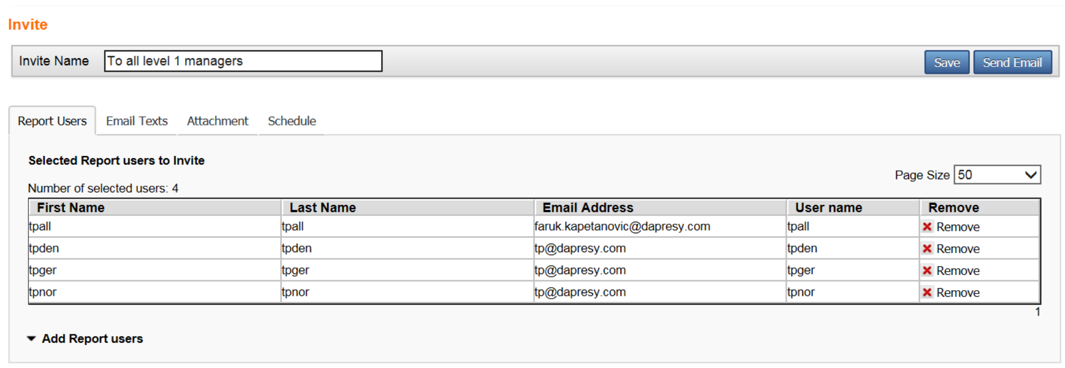
- Name of Invite (only needed if the Invite should be saved)
- Report users: View, add, delete report users in current invite
- Email Texts: Add email subject, email body text, etc.
- Attachment: New possibility to attach any StoryTeller report in the project as PPT/Excel report
- Schedule: New support for creating invite schedules

Name

If the Invite will be sent, a name must be added in the Name field. This is shown in the image below.

Report Users

This tab shows all the report users included in the current invite. Missing report users can be added, and report users can also be deleted.



Email texts

The email texts tab shows the functions for adding the text to the invite email. None of these functions have been changed since the last version.

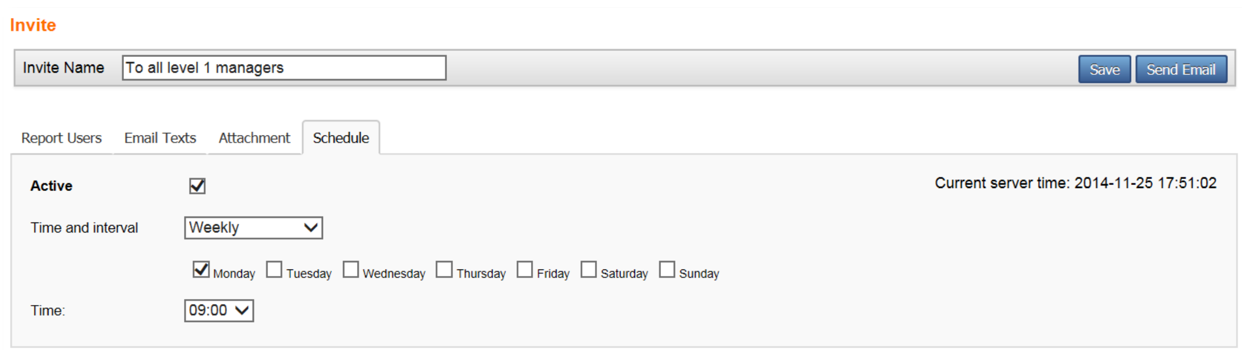
Scheduling

When defining the invite, it is possible to create schedules so that the same invite is sent out, for example, once a month automatically. It can also be used to remind the users that new data has been uploaded to the portal.

To define a schedule, do the following in the Schedule page:

1. Activate the Scheduling function
2. Select the interval among the following options
    a. Single occasion – select a date and time
    b. Weekly – select weekday(s) and a time
    c. Monthly – select a day in the month and a time

The image below shows an Invite scheduled to be send out every Monday at 09:00.



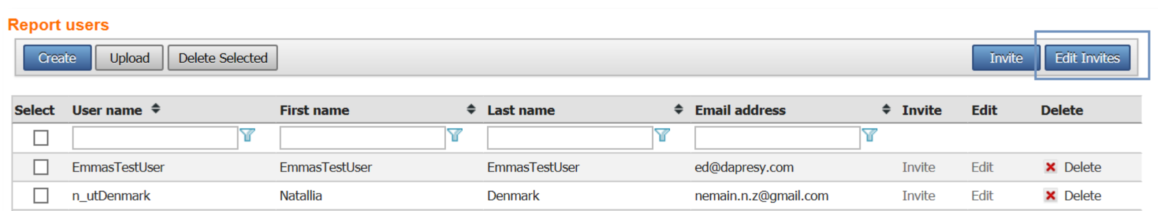
Send Invite

An Invite can be sent manually by clicking the “Send Email” button. This method can be used even if the Invite has a defined schedule.

6.1.2 Edit existing invite

To edit an existing invite or to send it again, click the “Edit Invite” option shown in the image below. When clicking that option, a pop-up window appears which lists all saved invites, from that list, the desired one can be selected.

The image below shows the “Edit Invite” button. Click that one to view all saved Invites.



The image below shows the pop-up window listing all existing Invites. To edit one, click “Edit”.

Invites

Name	Type	Next Invite	Edit	Delete
Standard region South			Edit	Delete
to be sent 17:00 the 18th	One Occasion		Edit	Delete
20 XI 2014 15:00 fk	One Occasion		Edit	Delete
To send out 14:00 - mail 1 of 2	One Occasion		Edit	Delete
To send out 14:00 - mail 2 of 2	One Occasion		Edit	Delete
Region North	One Occasion		Edit	Delete