# DAPRESY PRO 9

## TECHNICAL RELEASE NOTES

May 2014

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# 1. INTRODUCTION

We are proud to present our latest release, Dapresy Pro version 9 with many new and improved features. Our continuous customer focus and the many suggestions we receive are captured in this new release. We believe this a major improvement to Dapresy Pro and it will help you in creating even better projects.

This document describes the new and improved features in Dapresy Pro v9. This document will help you adopt these new features and improve your creations; bringing the latest features in data presentation that Dapresy prides itself for.

In addition to standard release notes format and content, we have added new visual guides that would help you in exploring the new features and provide a better understanding of upgrades we done. These include; how does the new feature work; how does it relate to the previous functionality and how does it affect your project. You will notice two information signs throughout the document:

Important information to remember about the new functionality

More details about the background of a feature or an upgrade

Our new release notes are divided into 10 chapters, each covering functional topics that are interconnected. These are grouped into:

- Chapter 3: Data import improvements
- Chapter 4: StoryTeller Usability upgrades
- Chapter 5: Charts - improvements and new functions
- Chapter 6: Tables - improvements and new functions
- Chapter 7: Optional Filters upgrades
- Chapter 8: Enterprise Feedback Management (EFM) Module
- Chapter 9: Significance tests improvements
- Chapter 10: Other improvements

In addition to improvements in data import, charts and tables, we have developed the new module: Enterprise Feedback Management (EFM) that enables users to manage input and deployment of new data into dashboards having real time analysis functionality that can be used throughout an organization for communication with action holders or participants. This feature along with Form function has been described in detail in chapter 8.

We look forward to continued common success through our product enhancement and the feedback we receive from you. If you have questions or suggestions regarding features or DapresyPro in general please contact us at:

Dapresy Global Support
Email: support@dapresy.com
Telephone: + 46 (0)76 019 89 42

Best Regards,

Dapresy Team 2014

## 2. SUMMARY OF NEW FEATURES

The following improvements and new features have been made in Dapresy Pro v9. Improvements and new functions are described in detail further in the document.

- **Data upload/import**
  - Import improvements – new enhanced data upload options
  - Added option for control if questions and answers are deactivated on data upload
  - Added checkbox for the same control for the Import Scheduler settings page
  - New logic for sharing Answer blocks
  - Added new option for admins to abort a started import
  - Added 'select all' function to 'Delete files' page
  - Added 'delete inactivated files' on scheduler import page

- **StoryTeller Usability**
  - StoryTeller setup as Start page
  - My Stories in StoryTeller
  - New option for hiding the Slide navigation
  - Switching to preview shows same slide
  - The keyboard arrows can now be used for moving StoryTeller objects and copying objects
  - Moving objects in StoryTeller one layer back/forward
  - New support for auto-aligning the position of multiple objects has been added
  - The “snap to grid” can now be turned on/off and the size of the grid can be updated
  - Transparent background of objects in StoryTeller
  - Show tabbed nodes moved to Change StoryTeller
  - Export simple table as screenshot
  - New alternatives to Floating time period

- **Charts**
  - New user interface on set up page
  - Support for hiding the legend
  - Improved thousand and decimal separator, options to select what character to use.
  - Improved logic in “Top X values” for showing top values per sub group
  - Support for adding a Mean values series based on the result in the chart
  - New calculation for showing percentiles values
  - New calculation for grouping transactional formatted data
  - Heat Map

- **Tables**
  - New user interface on set up page
  - Support for using custom images in the cell formatting
  - Support for changing the colors of the significance tests indication in the Cross tables
  - Support for adding a Mean values series based on result in the table
  - New settings for defining decimal- and thousand separators in tables
  - Merge series in tables

- **Optional Filters**
    - A layout update of the setup window has been made for better usability
    - The setup options “No selection” and “Use as multi select” was previously a report setting but can now be defined per filter
    - A search function has been added to the Filter selection boxes (Report User view)
    - New settings make it possible to show the selected Optional Filters as separate series (Compare series) in charts and tables
    - Support for updating the "No selection" label in the Filter boxes has been added
    - Access rights can now be set to ordinary Filters, in the previous version access rights could only be set to Hierarchical Filters
    - New support for defining which Hierarchical Filter unit to be default selected per Report User has been added
    - A new setting makes it possible to exclude a reporting object from the Optional Filtering and exclude series from optional filters

**Enterprise feedback management - EFM module**

- **Improvement in Event Server**
    - Option for an e-mail per respondent
    - Optional HTML e-mails in Event server
    - Direct links in Event e-mails
    - Schedule send outs
    - Option to use dates for creating conditions as reminders of a non-closed events

- **Improvements in StoryTeller report**
    - Respondent data table improvements
    - New support for defining the default sort order in the Respondent data table
    - Controls for scanning frequency of new respondents fulfilling the conditions.
    - Images in Respondent table

- **New report type FORM**
    - The new FORM report
    - Layout in form
    - Dependency between data fields
    - Option for customizing Data Fields in the Form report
    - Images per respondent in FORM

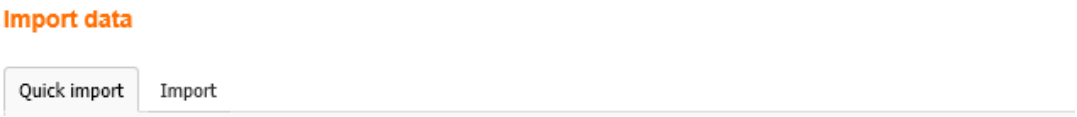
- **Input variable**
    - Input variable is new so please write
    - Creating Input Variable in Date format and based on existing Input variables

- **Significance tests**
    - Updated nomenclature for better usability
    - New support for selecting which base size to use in the significance testing, weighted or un-weighted
    - Improved comparison logic when running significance tests in nested tables/charts
    - Improved logic for running significance test against the first/last data point in a chart/table
    - Run sig test on mean of means function

- **Other improvements**
    - French translation added
    - Index questions in TableTool
    - Hfilter solutions – as new nodes added
    - Dynamic height of text boxes in action and planning
    - Use of multiple Date variables in reporting

# 3. IMPORT IMPROVMENTS

Import or data upload improvements consist of new and intuitive method for handling data uploads. For clients that are new to the system and not familiar with technical details, we have simplified the import procedure. Now there is an option to select your file and import it to the system without going through the settings and without the need to adjust metadata transformation. This new function is found uder “Quick import” button.




Two new elements have been added to visually guide the user through the data upload process. The Quick Quick import Import button works as a start point, regardless if you have SPSS, Triple S or Excel/CSV file.

We have kept the previous method, available with the selection of Import button, where the user defines all the settings and goes through the current familiar procedure with each new import.

TWO OPTIONS FOR DATA UPLOAD

QUICK IMPORT: THE UPLOAD PROCESS IS DONE WITH DEFAULT SETTINGS

IMPORT: IT’S REQUIRED TO DEFINE THE UPLOAD SETTINGS

## 3.1 IMPORT DATA

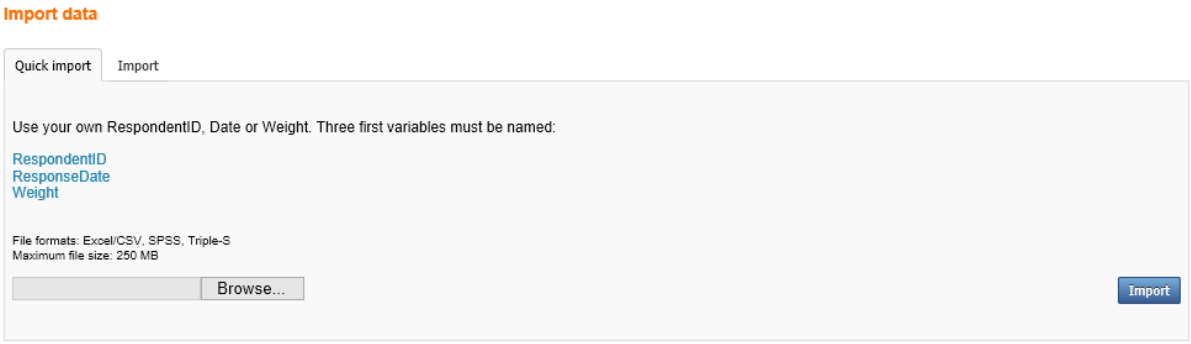
If users want to do a simple import and do not want to perform data adjustment or use advanced settings, this new option provides a quick and intuitive import. The Quick Import button has the following settings for data upload process, which are set as default:

- Variables sharing answer block: ‘Identical answer list’ is selected by default
- Inactivate excluded metadata: ‘not selected’ is option by default
- Import metadata & case data. System checks for new metadata and if not present, imports case data only.
- When importing with SPSS, only option that can be changed is ‘Multi Choice question separator’.
- When importing data with EXCEL/CSV available options that can be adjusted are:
  - ‘Sheet name’ and an drop down with existing sheets in the excel
  - Variable code row no
  - Variable text row no
  - Data start row no
  - Decimal separator
  - CSV Delimiter

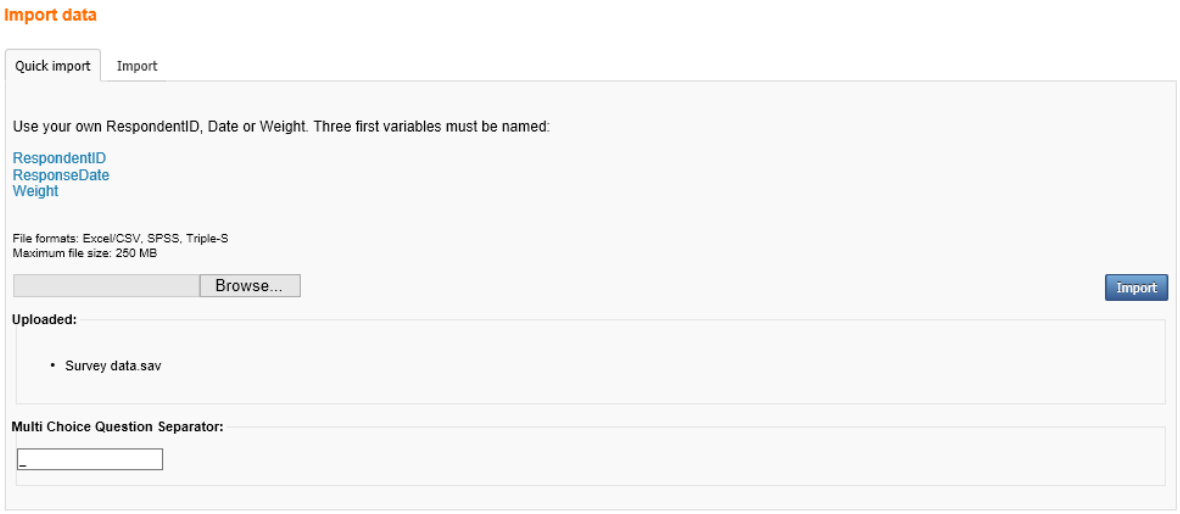
### 3.1.1 IMPORT SPSS FILE

If SPSS file is selected for data upload than the import is done in 4 steps and works as follows:

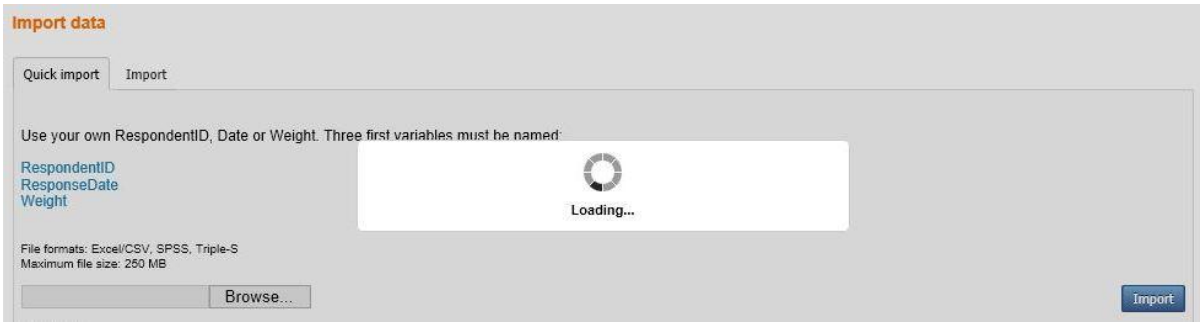
**Step 1: Browse for file**



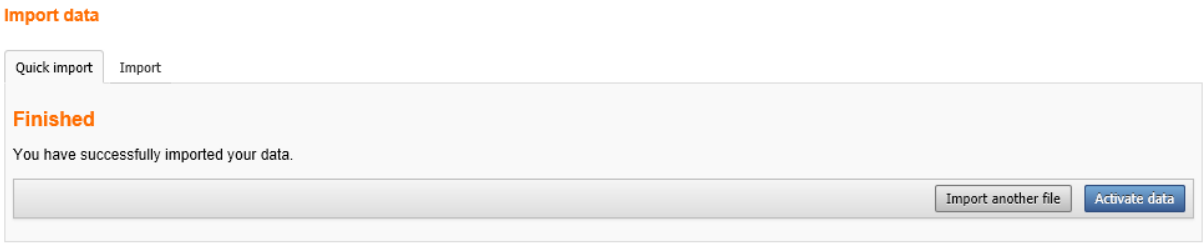

**Step 2: Correct file settings.** Once the file is selected, the system recognizes the file and shows correct settings. Here 'Multi choice question separator' can be changed. During this step the name of the selected file is shown.




**Step 3: Importing data.** The data and metadata are imported when user clicks on 'Import' button. The loading bar is showing the progress on 'Importing data'



**Step 4: Data import information message.** Once data is imported, the system shows information that data has been successfully imported**.** You will now see two new options that are available with selection to 'Import another file' and 'Activate data'. Once you select 'import another file' then the import page will be show again. When you select 'Activate data' you will be redirected to activate data page.




*The following improvements have been made to the SPSS data upload in order to enable direct import:*

***1**. If there are Missing RespondentID, ResponseDate or Weight variable(s). - These variables are added in a way the Metadata transformation is done, applying the following logic: If respondent ID is missing than: RespondentID: last respondentid+1; If response date is missing than: ResponseDate: current date (date when data is importing); If weight is missing than: set weight to 1 on all respondents*

***2.** There are answers in data that do not match any of the answers in the answer list- Code added in the end of the answer list which is used as answer text as well*

***3.** If there is a Multi separator on questions that are not multi questions. For example if we have 'country_sweden' than there shouldn't be '_' in the name, as this is multi choice question separator. If there is only 1 variable and not having number after separator then the separator is removed from name by default.*

***4.** Duplicated RespondentID - Create new RespondentID and replace the duplicated one with it.*

***5.** There is a RespondentID variable but some respondents are missing ID - The system creates new RespondentID and use on the empty rows*

***6.** There is a Weight variable in the file but some respondents are missing value - The system Sets 1 as weight for all missing rows*

***7.** There is a ResponseDate variable but some rows are empty - The system sets current date instead*

***8.** Negative values in categorical questions - Recode all negative values to code '9001' and add it to answer list for that question.*

***9.** Single choice question is having answer 0 in the data but there is no answer ID=0 in answer list – The system treats the Data as empty (null)*

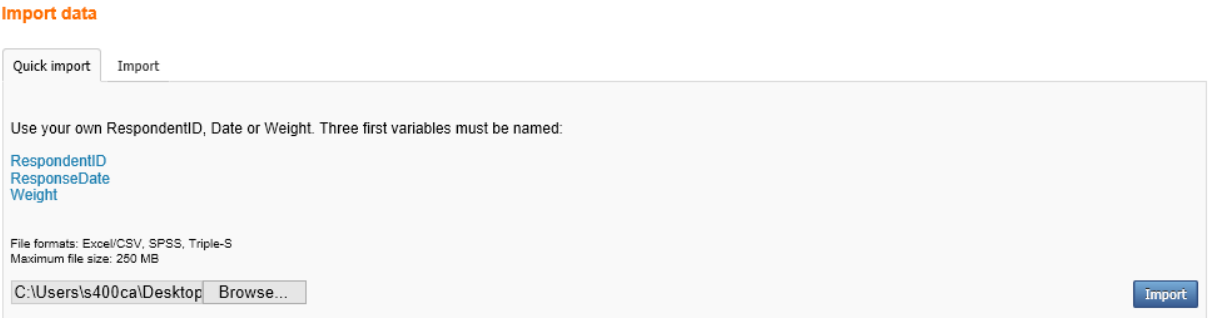
***10.** Variable names cannot be longer than 60 characters. - Error message is shown to the user*

***11.** Answer ID cannot consist of more than 16 numbers- Error message is shown to the user*

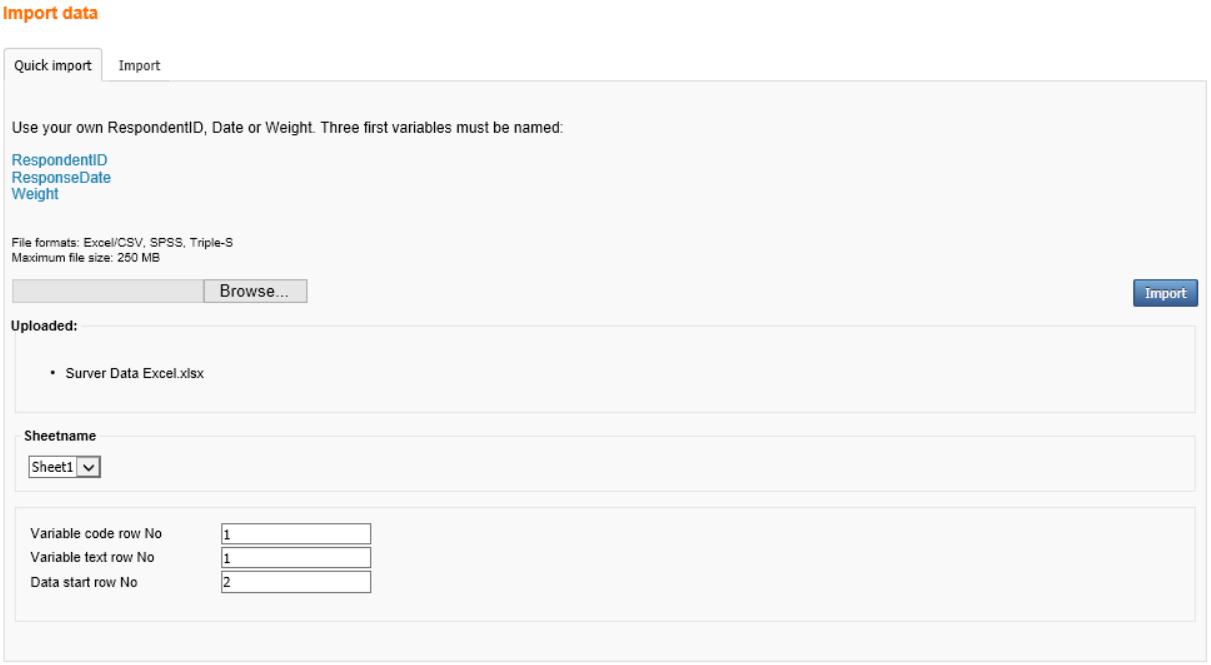
## 3.1.2 IMPORT EXCEL/CSV FILE

The Excel import assumes there will be Metadata transformation. The Excel import works as follows:

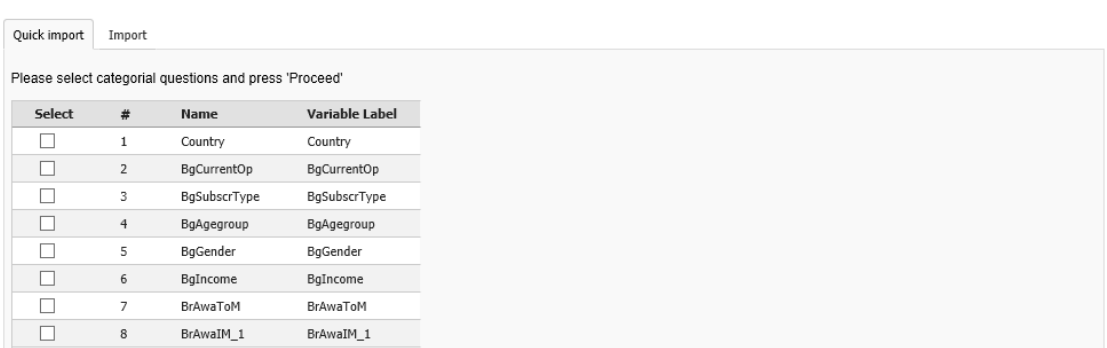
**Step 1: Browse for file**. New metadata and case data is selected by default.




**Step 2: Choose where variables and data can be found:**



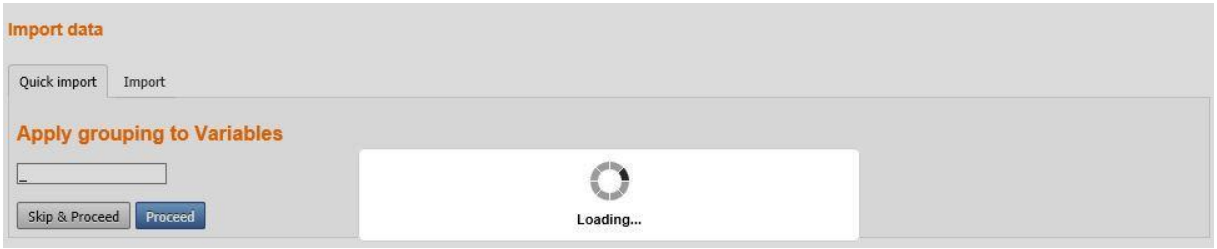

**Step 3: Metadata transformation opens**. Once import button is pressed, all variables are shown and you must choose which questions are categorical. If you have correct format for RespondentID, Response Date and weight, then these variables should be used as RespondentID; ResponseDate and Weight. In case there are no correct variables then RespondentID, ResponseDate and Weight are created automatically.



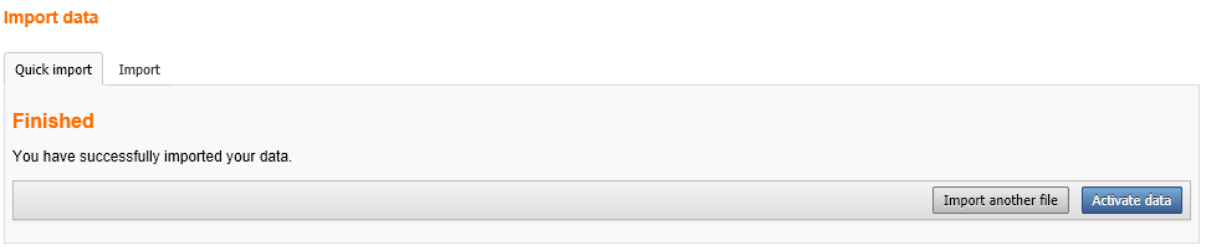
**Step 4: Select separator for multi questions**


Note: 'Use suffix as code' is always selected by default.

**Step 5: Data imported to the project. T**he loading bar shown while importing data. Metadata transformation is saved automatically and used next time you import data to this project. It's required to name the metadata transformation with project name and date. This metadata transformation will be visible when importing with advanced import.




**Step 6: Data import information message.** Once data is successfully imported, you will get a confirmation message as shown below. You will now see two new options that are available with selection to 'Import another file' and 'Activate data'. Once you select 'import another file' then the import page will be show again. When you select 'Activate data' you will be redirected to activate data page.




STEP 1: BROWSE FOR FILE
STEP 2: CHOOSE WHERE VARIABLES AND DATA CAN BE FOUND
STEP 3: METADATA TRANSFORMATION OPENS
STEP 4: SELECT SEPARATOR FOR MULTI QUESTIONS
STEP 5: DATA IMPORTED TO THE PROJECT
STEP 6: DATA IMPORT INFORMATION MESSAGE SHOWN

### 3.1.3 IMPORT TRIPLE-S FILE

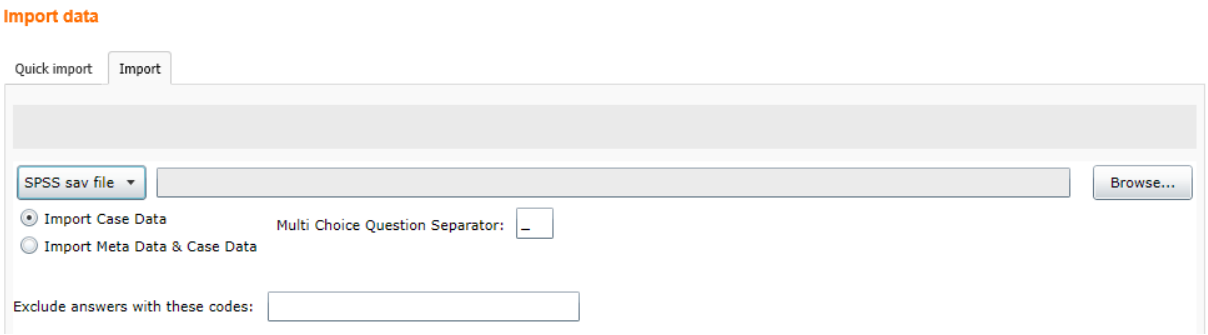
Improvements in importing of Triple-S file are the same as for SPSS file. Steps for importing are as follows:
**Step 1: Browse for file.** New metadata and case data is selected by default.

**Step 2: Choose file and import.** The data and metadata are imported when user clicks on 'Import' button. The loading bar is showing the progress on 'Importing data'

**Step 3: Data import information message:** Once data is imported the system shows information that data has been imported successfully**.** You will now see two new options that are available with selection to 'Import another file' and 'Activate data'. Once you select 'import another file' then the import page will be show again. When you select 'Activate data' you will be redirected to activate data page.

## 3.2 IMPORT (manual set up)

The import function has kept the same features as the previous data import process, where all the settings need to be done manually. As a reminder there are three mandatory columns that need to be in the beginning of the SPSS file; Respondent ID, Response Date and Weight.

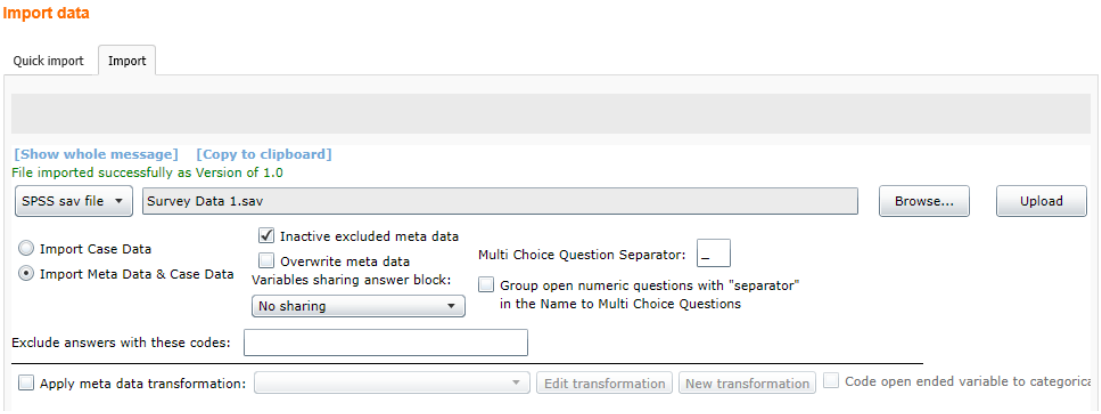



## 3.3 QUESTIONS AND ANSWERS ACTIVATION ON UPLOAD

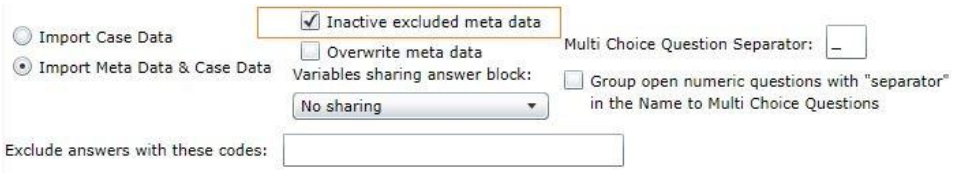
The upload of new data when using the option "Import Metadata and Case data" inactivates all questions and answers automatically which not are present in the imported file.

*Up until this improvement the user was required to have all of Metadata for old questions in the file as well, otherwise the system would recognize that the question, or answer alternatives, shouldn't be used in the system anymore. Then all of the questions and answers that don't exist in the imported file would be inactivated. The solution was to import all of Metadata all of the time, even if there aren't any new data for variables, otherwise they would get inactivated.*

This is not the desired behavior in most of the cases as the purpose usually is to add Metadata and not to inactivate Metadata when using the function "Import Meta and Case data". To solve the issue a new option is added as shown in the image.




This option is available only if “Import Metadata & Case Data” has been selected.



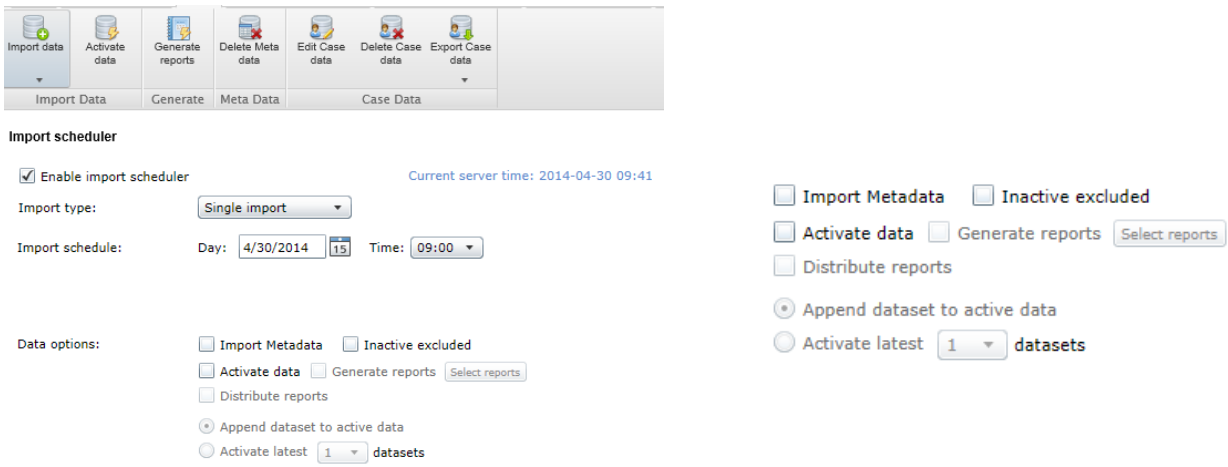

THE QUESTIONS AND ANSWERS OPTIONS NOT PRESENT IN THE IMPORTED DATA FILE WILL BE INACTIVATED DURING THE DATA IMPORT

This option is NOT selected by default in a new project, while in existing projects it’s activated by default. If the option is checked all non-present Metadata is being inactivated.

If the option is NOT checked no inactivating is made at all; the import just adds new Metadata.

### 3.3.1 QUESTIONS AND ANSWERS ACTIVATION ON UPLOAD IN SCHEDULER

The same settings for this feature are available in scheduled imports.



## 3.4 NEW LOGIC FOR SHARING ANSWER BLOCKS

The answer blocks are created during the Metadata import to Dapresy Pro. An answer block can then be updated and questions get new answer blocks during additional metadata imports or when the metadata is overwritten during the data imports.

*An answer block is a list of answer alternatives, which is used by all questions that use the same answer list. The purpose of having an answer block used by several question instead of having one answer block per question is to save time in the setup process. You probably want to have the same color for Brand X in all questions and by using shared answer blocks the brand color can be changed in one place. Another example is defining Top and Bottom-box values: you can set those up once and they can be used for all questions that share that Answer Block. Besides saving time the External data (Media expenditures, Sale figures etc) is connected to an answer block in the project. So if media spending should be used in a project it is very important to only have one answer block containing the relevant answer-alternatives.*

Two new settings are added in the import screen so the Administrator can select the desired behavior of the Answer block sharing. The new options are:

1. ONLY VARIABLES WITH 100% IDENTICAL ANSWERS SHOULD SHARE ANSWER BLOCK
2. NO VARIABLE SHOULD SHARE ANSWER BLOCK

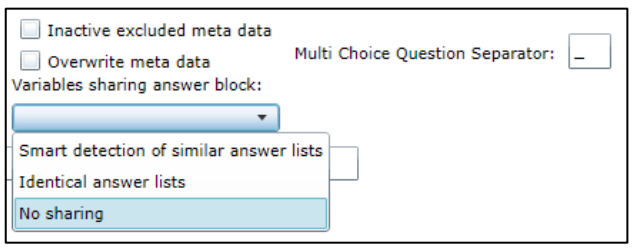
The behavior can be selected both in the first Metadata import and also in additional Metadata imports.

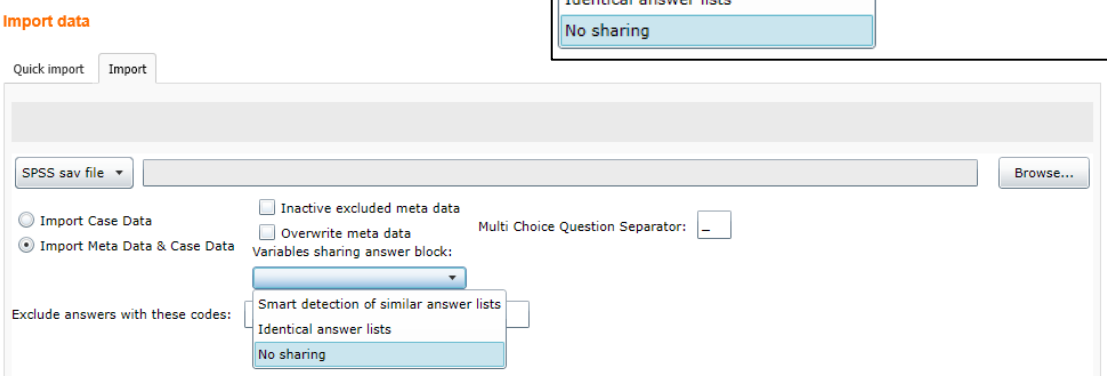
**Only variables with 100% identical answers should share answer block.** If this option is selected, only variables with 100% identical answer lists share answer block. The check will be made in both the answer Text and the Code. To share answer block the Text+Code+ the number of answers must be identical.

**No variable should share answer block.** If this option is selected, no questions will share answer blocks. All questions should get their own answer block.

As shown in the image below, a new settings option has been added to the Data import page. The setting is available only when “Metadata” is being imported. If only Case data is being imported the new setting is not available. The selection contains following options:

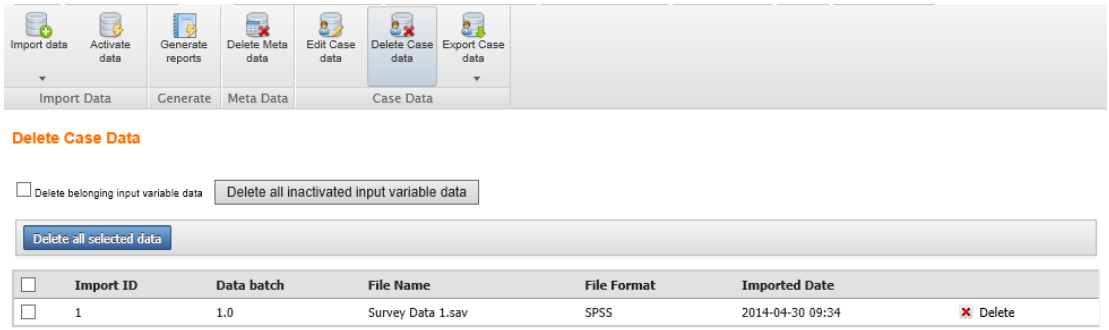
1. Smart detection of similar answer lists
2. Identical answer lists
3. No sharing



## 3.5 SELECT ALL FUNCTION FOR 'DELETE FILES' PAGE

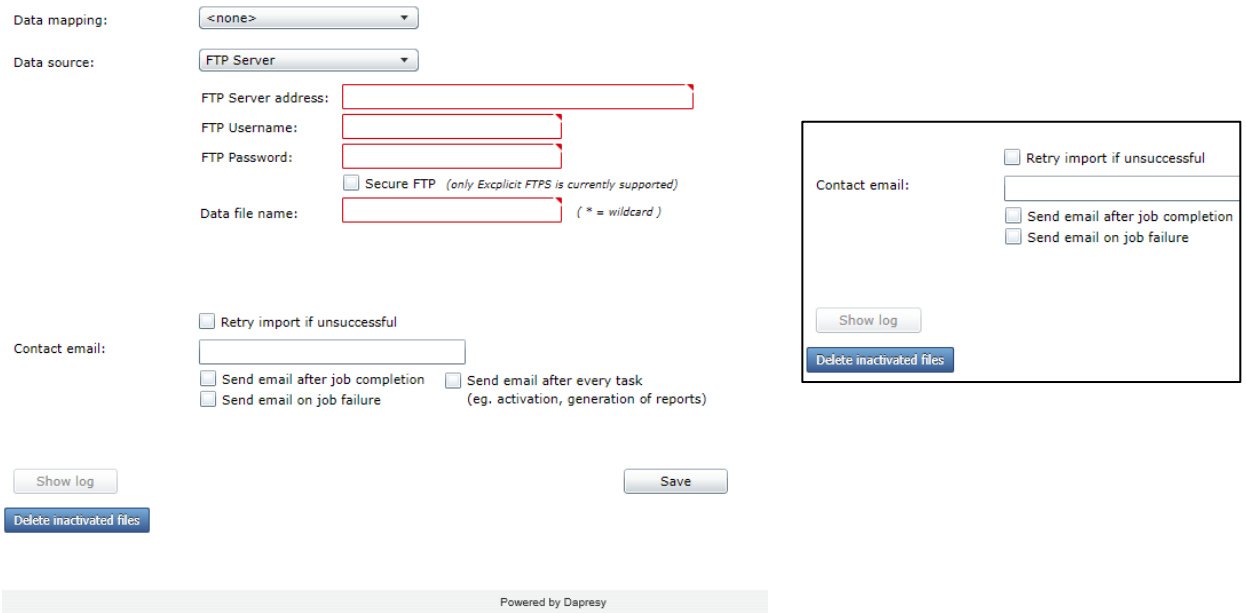
On the “Delete files” page, “Select all” function has been added to enable deleting multiple files at once.




*As projects are becoming very active and there are more files being imported into one project on a daily basis, there are number of data files accumulating over time. The “Activate / deactivate data” page is flooded with files and it can be impractical to select each of the file individually. The select all option add practical solution for selecting multiple files.*

## 3.6 DELETE INACTIVATED FILES ON SCHEDULER IMPORT PAGE

On the “scheduler import page” page, 'delete inactivated files' function has been added to enable deleting multiple files at once. This enables deleting all previously imported files – however this only deletes files if there are no importing errors.

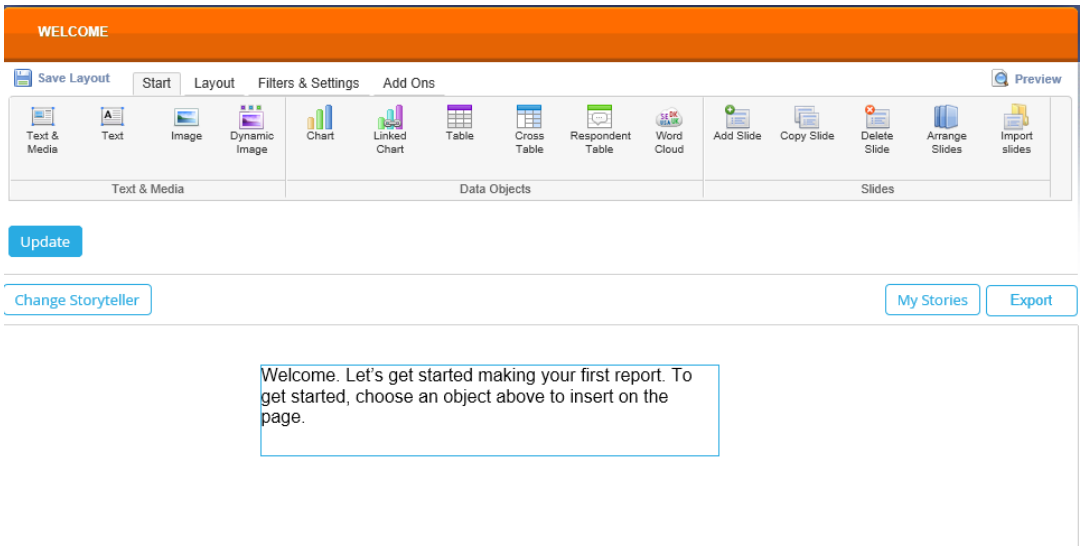


# 4. STORYTELLER UPGRADES

The StoryTeller upgrades consist of new features and lot of improvements. Some of these new features are Heat maps, which are more than visual representation of data using colors, and My Stories where your favorite slides in one report. Let's start with exploring how to setup a StoryTeller as a start page.

## 4.1 SETUP STORYTELLER AS A START PAGE

For all new projects, the start page is now removed and replaced with 'Welcome' and has following text: "Welcome. Let's get started making your first report" as in the picture shown below.




To get started, choose an object above to insert on the page" All existing projects still have Start page as before and only new created project will have 'Welcome' as start page.

*All projects today have a start page that is not so easy to style. In projects, before the upgrade StoryTeller is used as first page and Start page was hidden with custom css code.*

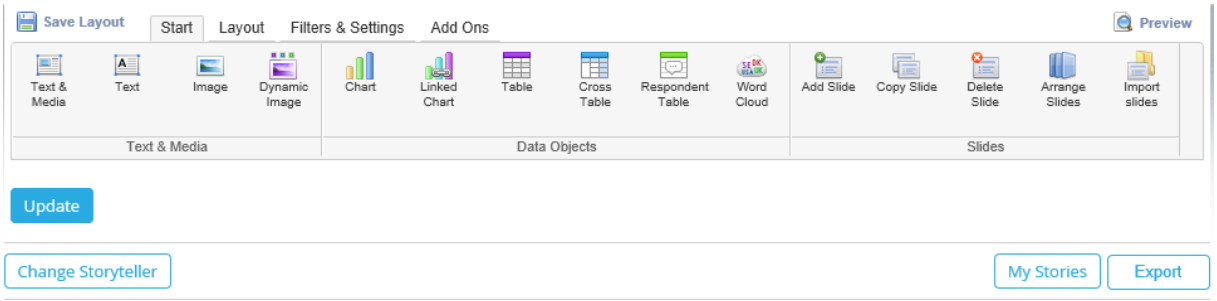
## 4.2 MY STORIES IN STORYTELLER

My stories in a new feature created to enable storing of selected slides into one set. My stories are part of StoryTeller and each report or admin user can now save favorite slides including optional filters to 'My Stories'. The purpose is to allow a User to filter and edit the content of a slide view, and save the specific view for future use. For example, a typical StoryTeller could have hundreds of permutations. A User could edit and filter a select set of slides and save as an "Executive Overview" to download and share with others, or use to present in a meeting

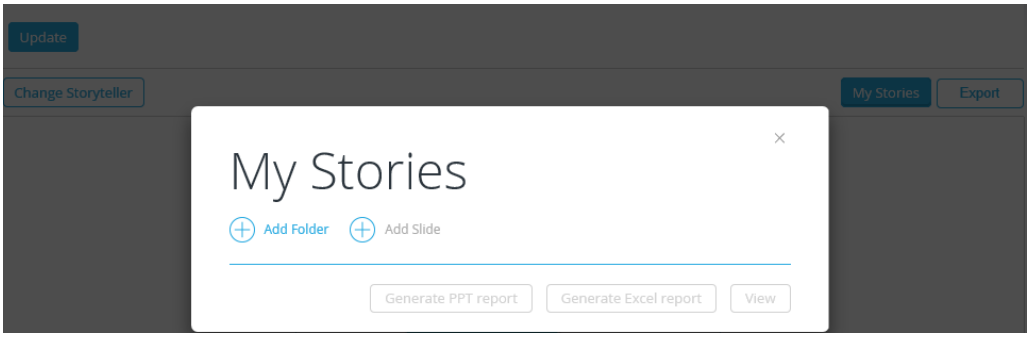
This feature content is linked to a User and as a report or admin user creates their slide set, other admins or users cannot view the content. 'My Stories' is visible in all StoryTeller reports and any combination of slides from all StoryTeller reports in the same project can be added to 'My Stories'.

## 4.3 HOW DOES ‘MY STORIES’ WORK

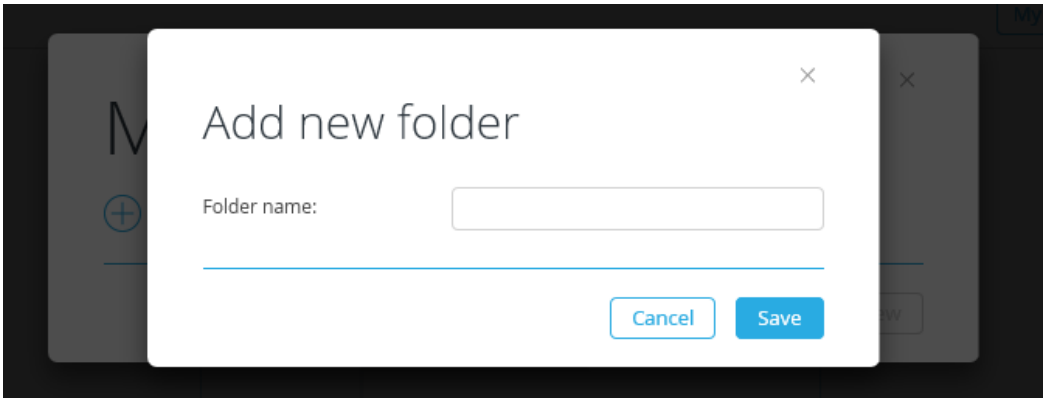
A new button named ‘My Stories’ is added to StoryTeller. This button is visible for both admins and report users having access to this feature. All content that is saved to ‘My Stories’ by a user will be connected to that particular account and can’t be visible for other users.



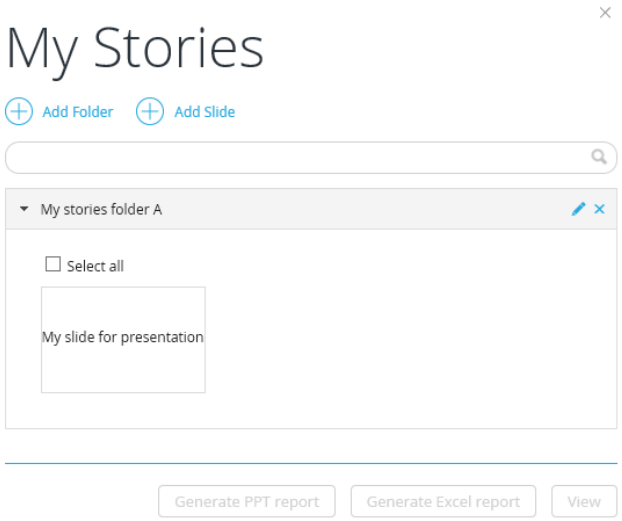

The User edits their screen view and clicks the ‘Update’ button. They then go to the slide that he wants to add to ‘My Stories ‘and click on ‘My Stories’ where a new panel will open. Here the User can click on ‘Add New’ and save the current slide to ‘My Stories’.




Once the user clicks ‘Add new’, a pop up will appear where they can type a name for selected slide and options. It’s possible to save slides into different folders. This way a User can save slides for ‘Monthly report’ or ‘Quarter report’ etc.




Once the folder and name fields are completed, the user clicks on ‘Save’ button and the new slide will be added to ‘My Stories’ in the selected folder.



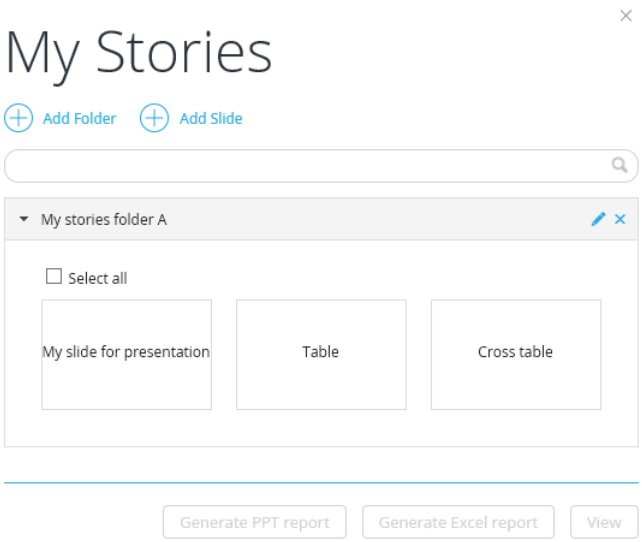

FOLLOWING IS SAVED IN MY STORIES SLIDES:

ALL OBJECTS ON THE SLIDE AND THEIR POSITIONS

OPTIONAL FILTERS THAT DATA IS SHOWN FOR IN OBJECTS WILL BE INCLUDED IN THE CHARTS/TABLES/CROSS TABLES/WORD CLOUDS/ RESPONDENT DATA TABLE/DYNAMIC IMAGES

SELECTED H-FILTERS WILL NOT BE SAVED.

In the same way as described above, a user can add as many slides as they want and from different reports in the same project. 'My Stories' list will look like image below:

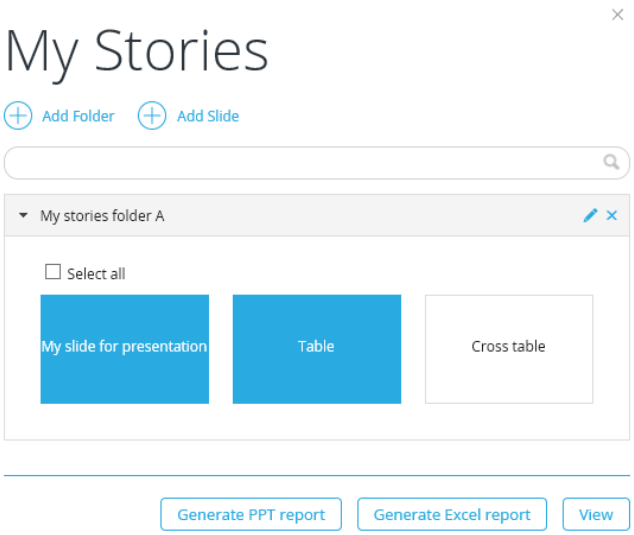


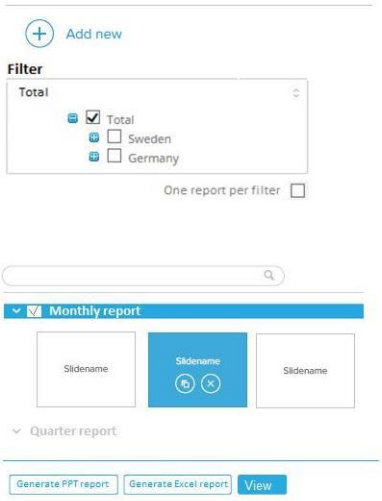
*IT'S POSSIBLE TO DO FOLLOWING WITH CREATED LIST FOR 'MY STORIES'*

DOWNLOAD REPORT TO PPT/EXCEL
VIEW REPORT ONLINE
DELETE/RENAME/COPY
SORT BY 'DRAG-AND-DROP' FUNCTIONALITY

### 4.3.1 DOWNLOAD MY STORIES TO PPT/EXCEL

To download 'My Stories' to PPT, the User selects either individual slides or can "Select All" from the My stories menu. Click either 'Generate PPT' or 'Generate Excel' to download.



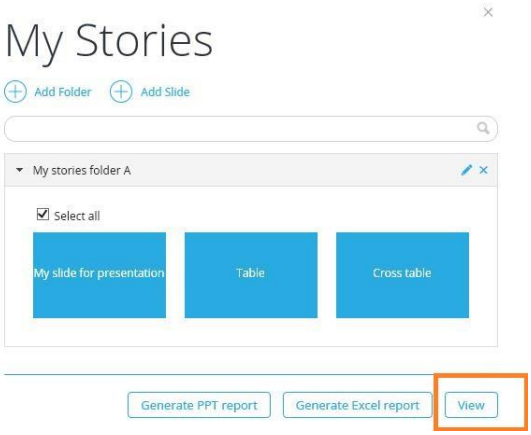




IF IT'S H-FILTER PROJECT THEN USER WILL NEED TO SELECT H-FILTERS TO DOWNLOAD.

IT IS POSSIBLE TO GET EVERYTHING DOWNLOADED INTO ONE FILE OR SPLIT UP PER FILTER (MULTI SELECT IN HFILTER), SAME FEATURE AS EXPORTING STORYTELLER REPORTS TO PPT.

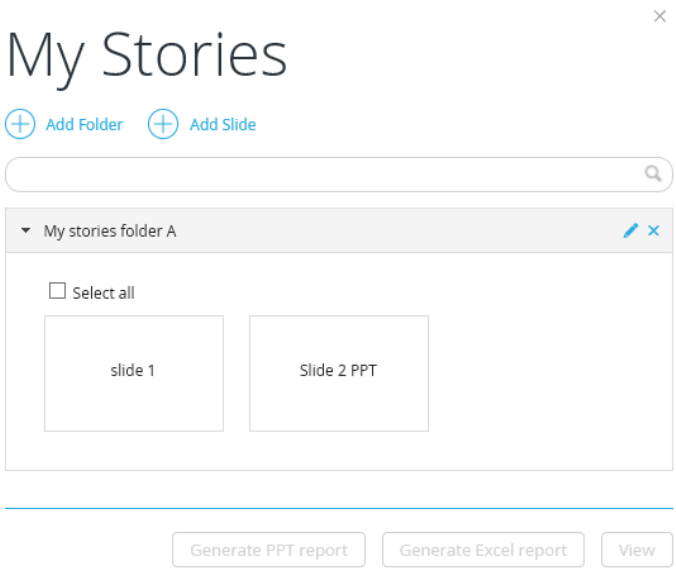
### 4.3.2 VIEW ‘MY STORIES’ ONLINE

The User selects slides to view and clicks on button ‘View’. If a folder is selected then all slides in that folder will be visible:

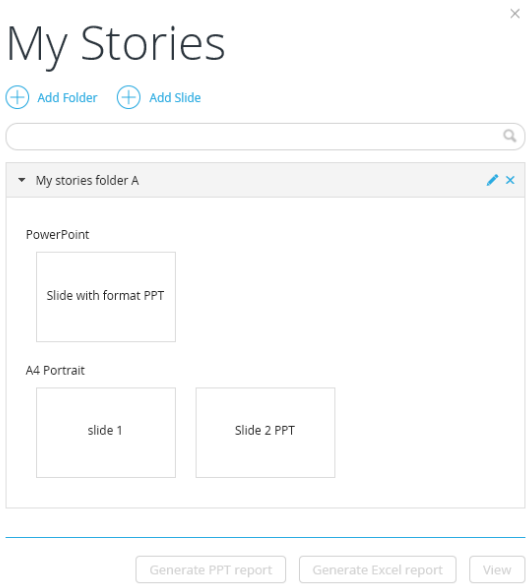



### 4.3.3 MY ‘STORIES’ WITH DIFFERENT FORMATS

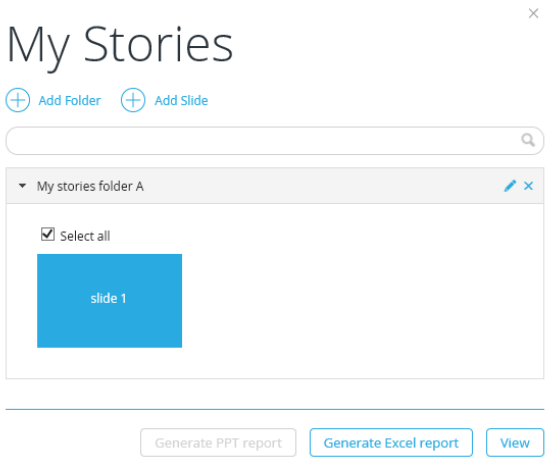
Today we have three different formats in StoryTeller: PPT Format; A4 Landscape; A4 Portrait. The User is able to add favorite slides from all StoryTellers, regardless of what format they are in, but it’s not possible to view different formats online at the same time or download if they are in different formats. As long as user has only one format saved to ‘My Stories’ list will look like the one below:



If user adds slides/pages from different formats then these slides/pages are split into different groups. Here is the example of the slides/pages saved from two different formats):



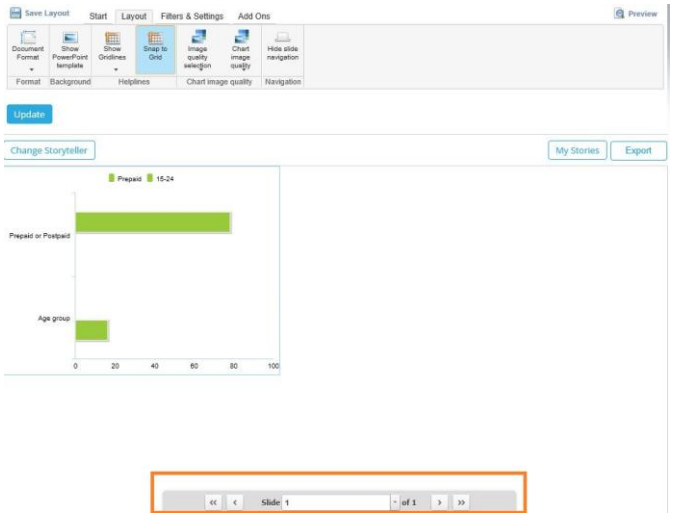

If user has only A4 Landscape or A4 Portrait then 'Generate PPT report' button is disabled.



## 4.4 HIDE THE SLIDE NAVIGATION

Hide slide navigation is a new option. This functionality can be turned off or on, depending on user preferences. In cases when the navigation is hidden, the Administrator can add links (by using the Text object) for navigating between the slides.

With this new functionality, the export to PPT/Excel is modified. If the slide navigation is hidden, the system will only export (PPT or Excel) the current slide - not all slides.



## 4.5 SETUP FOR HIDING THE SLIDE NAVIGATION

There is a new button added that enables/disables hiding the slide navigation. The hide slide navigation button is located in “Navigation” tab as shown in the image below.

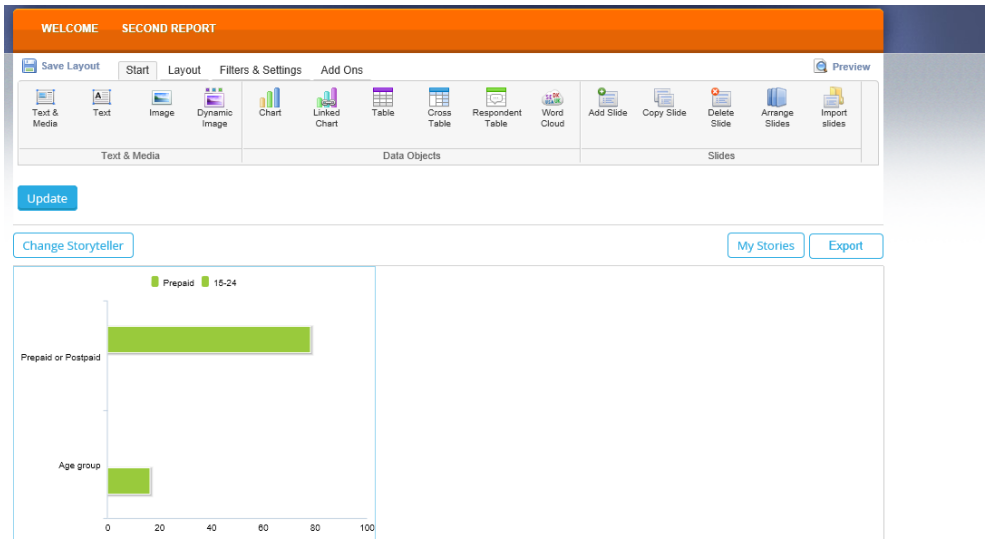

ONCE APPLIED, ONLY THE SLIDE NAVIGATION IS HIDDEN. THE LOADING BAR SHOWING THE LOADING (PROGRESS) OF THE CURRENT SLIDE IS STILL SHOWN.

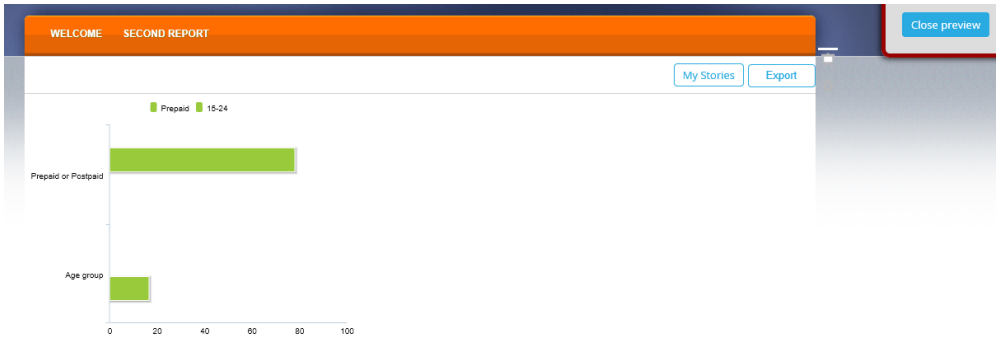
THE SETTING FOR HIDING THE SLIDE NAVIGATION IS NOT APPLIED ON A SUB REPORT LEVEL AND DOESN’T FUNCTION AS A SETTING FOR COMPLETE STORYTELLER. THE SETTING FOR HIDING OR SHOWING SLIDE NAVIGATION NEEDS TO BE ADJUSTED ON EACH INDIVIDUAL SUB REPORT LEVEL.

ONCE THE NAVIGATION IS HIDDEN IT IS ONLY HIDDEN IN REPORT USER VIEW, WHEN LOOKING AT THE REPORT FROM A SETUP VIEW THE NAVIGATION IS STILL BE SHOWN AS OTHERWISE IT WILL BE HARD TO MAKE THE SETUP OF THE REPORT.

## 4.6 PREVIEW SHOWING THE SAME SLIDE

Switching to preview is used often by admins who want to see how their report will look like for the user in the final view. We have changed the preview to default and display the current slide you are working on, not reset back to the first slide of the set.




## 4.7 USE KEYBOARD FOR MOVING AROUND, DELETING AND COPYING OBJECTS

Keyboard support has been added for a more user-friendly StoryTeller setup.

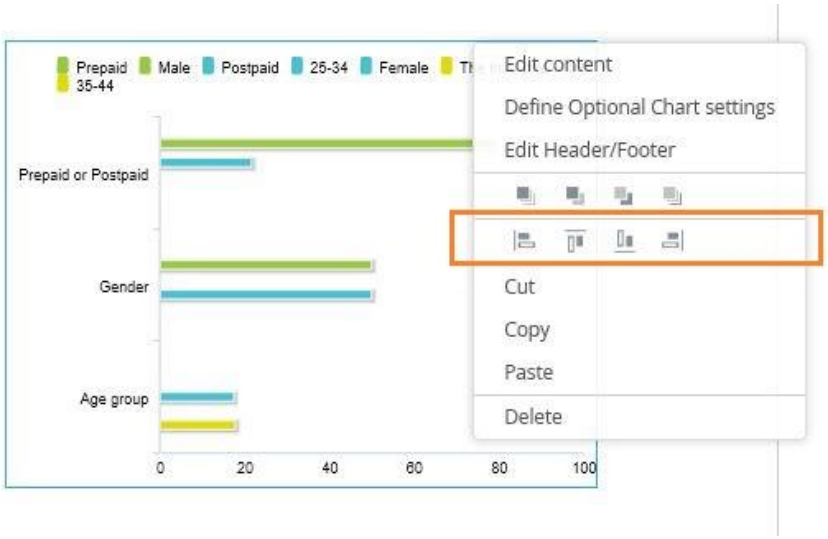
1. The keyboard arrows can be used for moving selected objects around in the setup screen
2. The “CTRL+C” and “CTRL+V” logic can be used for copying and pasting selected objects
3. The “Delete “button can be used for deleting selected objects.

## 4.8 AUTO-ALIGNING OBJECTS

A new option has been added for aligning objects to each other automatically. The option makes it more effective to create reports including many objects that need to be aligned. The following aligning options are present: Align left; Align right; Align top; Align bottom

### 4.8.1 SETUP

Select the objects to align, right click and select the option to be applied to the selected objects. The image below shows the Aligning controls in the StoryTeller setup page.

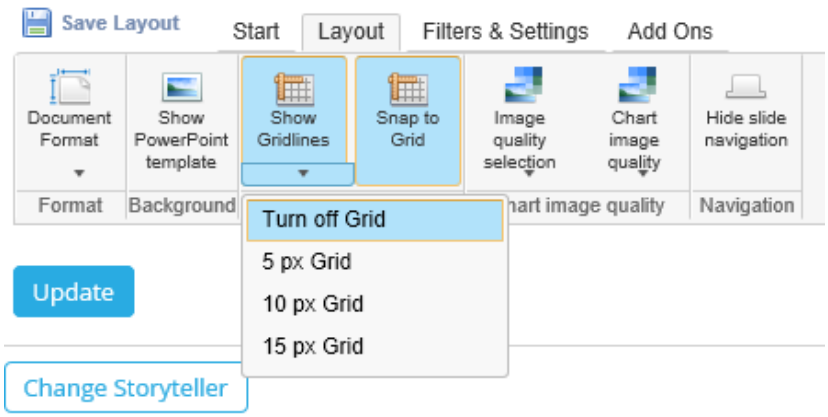



## 4.9 TURN "SNAP TO GRID" TURN ON/OFF

This new feature allows an even more exact position of StoryTeller objects making it easier to align images and objects to each other. This new feature makes it possible to control whether objects should be snapped to the grid lines or not. The size of the grid lines can also be changed.

### 4.9.1 SETUP

The new settings are placed in the Layout tab as shown in the image below. The size of the grid lines are selected in the Show Grid line menu and the option to snap objects to the grid lines or not is selected by clicking the Snap to Grid button. The image below shows the new settings.



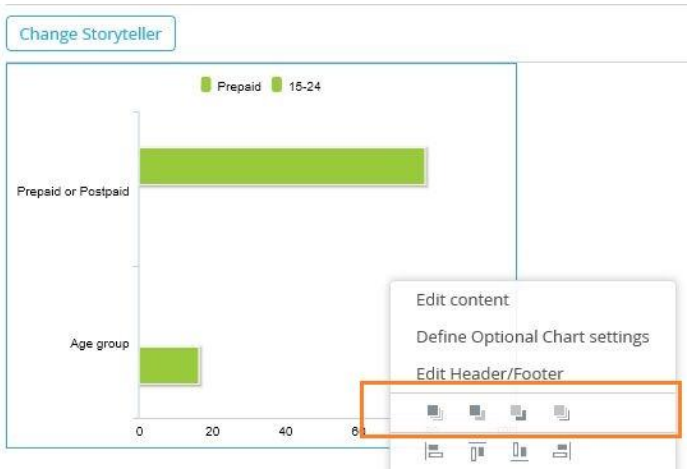
## 4.10 MOVING OBJECTS IN STORYTELLER ONE LAYER BACK/FORWARD

The new option for moving objects by layer is now available on the right click menu. This new option enables bringing the object one layer forward or one layer backward.

> *In StoryTeller there were only two options to move one object to the back or bring it to the front; Using 'Bring to the front' object is moved forward and placed on top layer. Using send to back: the object is moved to the back and placed as last layer in the back. New options are: Bring forward and Send backward*

**Bring forward**. When user selects an object and click on bring forward then selected object is moved one layer up. It's important to check all objects on the same slide and just move selected object one layer up compared to all other objects.

**Send backward.** When user selects an object and click on 'send backward' then selected object should be moved one layer down (back). It's important to check all objects on the same slide and just move selected object one layer back compared to all other objects.

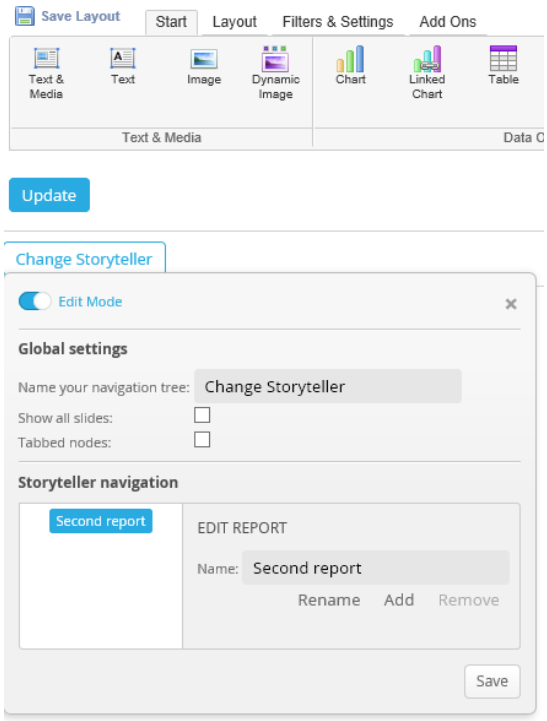



## 4.11 SHOW TABBED NODES MOVED TO CHANGE STORYTELLER

'Use Tabbed Nodes' applies to all nodes in the StoryTeller report. If you setup the main StoryTeller to "Use Tabbed Nodes', the subpages are inheriting the same settings to use nodes.

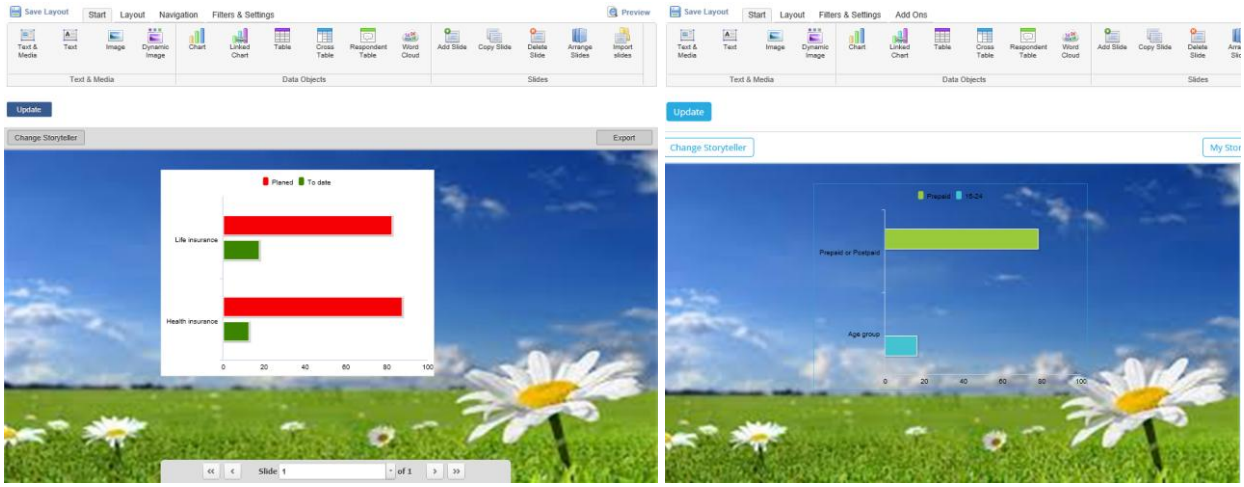
> *Previously the used needed to access "change StoryTeller" every time and set up use tabbed nodes for each new tab (node).*

Also the 'Use Tabbed Nodes' feature is moved to 'Change StoryTeller' panel and Navigation tab is removed.



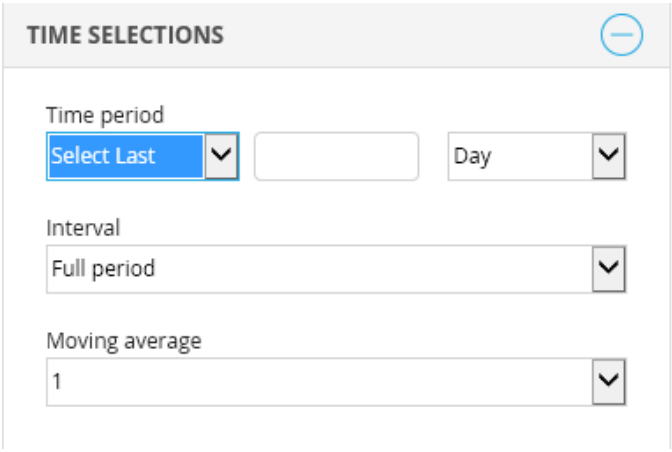

## 4.12 TRANSPARENT BACKGROUND OF OBJECTS

The objects in StoryTeller now have a transparent background when the User is in admin view. The images below illustrate this new feature; the left image is how it used to look, on the right is the new transparent version.



## 4.13 NEW ALTERNATIVES TO FLOATING TIME PERIOD

The time period settings are now more dynamic. The following changes have been made for time period settings. When Time period selection “Select last” is made, a user can make a free selection and type in number of days, weeks, months, quarters or years that he wants to show.

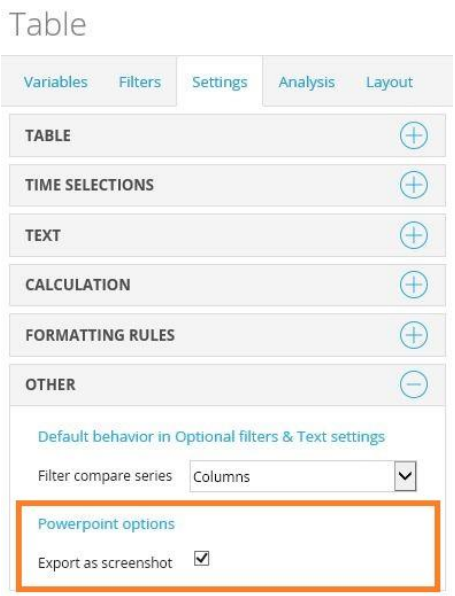



'Day' as an alternative has been added to the dropdown box including weeks, months, quarters and years. The text field (for number input) and drop down to the right are disabled when following options are selected:

- Select start and stop date
- Year to date
- Full period

## 4.14 EXPORT SIMPLE TABLE AS SCREENSHOT

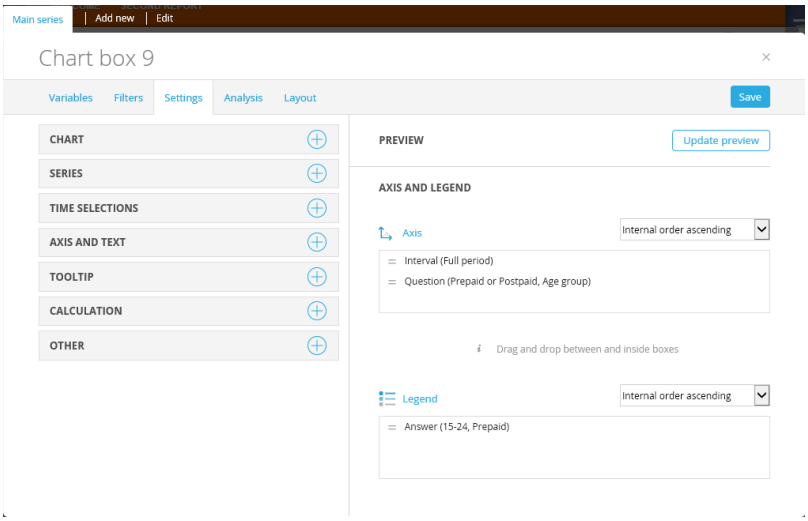
Now it’s possible to export a table as a screenshot, which makes it easier for users that require a single table in an export and not the complete set on a StoryTeller page. This option is available by accessing table settings in a section named ‘Other’ below ‘Formatting Rules’, as shown in the picture bellow:



# 5. CHARTS – IMPROVMENTS AND NEW FUNCTIONS

## 5.1 New user interface

The new user interface has been developed for charts. The new interface provides more user-friendly navigation and it's visually intuitive as new features and functions are added.

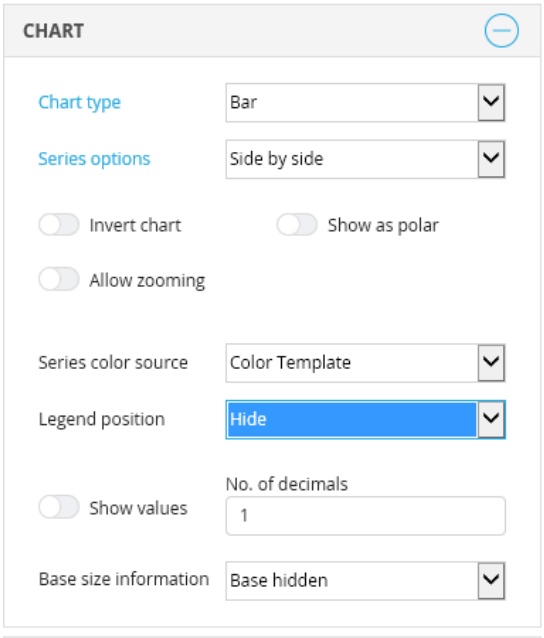



## 5.2 SETTING FOR HIDING THE LEGEND

A new option for hiding the legend in a chart has been added to make it easier to completely hide the legend. A single selection is needed instead of hiding different text objects.

### 5.2.1 Setup

The new option is placed in the dropdown list for selecting 'Legend Position' as shown in the image below. The option for hiding it is placed in the bottom of the list.



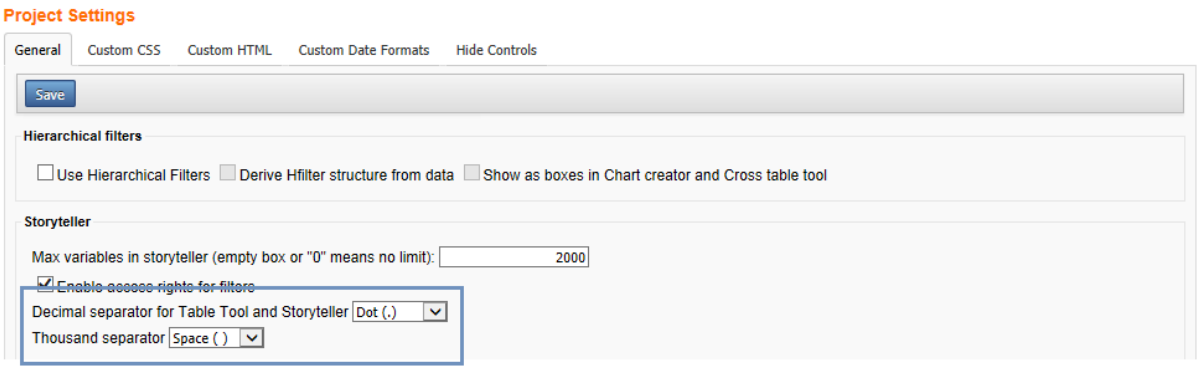
## 5.3 IMPROVED THOUSAND AND DECIMAL SEPARATOR LOGIC

You can now select thousand or decimal separator which makes it easier to adapt the project to different cultures.

### 5.3.1 SETUP

The definition of the thousand and decimal separators are made in the Project settings page as shown in the image below. Comma, period or space can be used as thousand separator and comma or period can be used as decimal separator.

*The image below shows the new controls in the Project settings page.*




## 5.4 IMPROVED "TOP X VALUE" LOGIC

The "Top X value" logic has been improved to support the subgroups within an axis group. The examples below visualize the improvement.

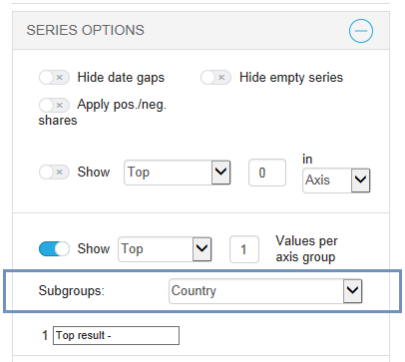
The top chart in the image below shows the original chart. The result is shown for different brands in different markets split up by Gender. The second chart shows the result when the "Top X Value" has been applied without considering the subgroups (the logic supported in the previous version).

The third chart shows the result when the "Top X Value" has been applied and been split up by country (sub group). In this example, using the new sub group logic makes it now possible to get the top result per country.


## 5.4.1 SETUP

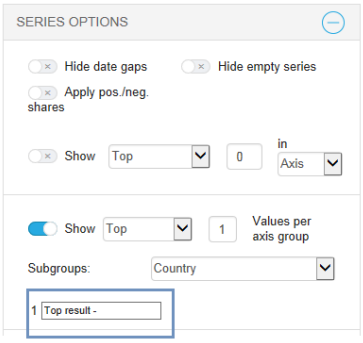
To select if the sub groups should be considered, a new selection list has been added in the Series Option panel shown in the Settings tab. The selection list contains the entire possible sub groups (the legend items). If the "Top X value" should be shown per sub group the desired sub group is selected in the list. As default the option "No selection" is selected which means that the sub groups are not being considered.

*The image below shows the new control in the setup.*

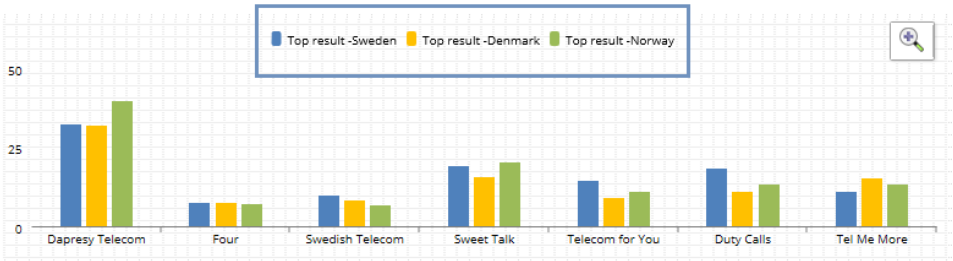



The logic of the labels shown in the legend has been updated to support the sub groups. The labels of the "top X" series are based on the defined label text and the label of the sub group option. The image below showcases the logic.

*The image below shows the defined label text, which is "Top result – ".*




*The chart below shows the result. The label is a mix of the defined label text and the name of the options in the Country variable.*

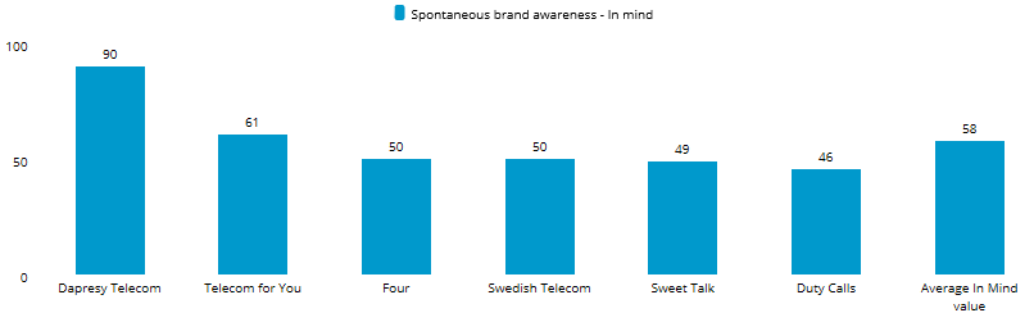



## 5.5 NEW SUPPORT FOR ADDING MEAN VALUE SERIES

A new option for adding mean value series to a chart based on the shown result has been added. The feature can be used in a lot of different areas and project types and below are two examples.

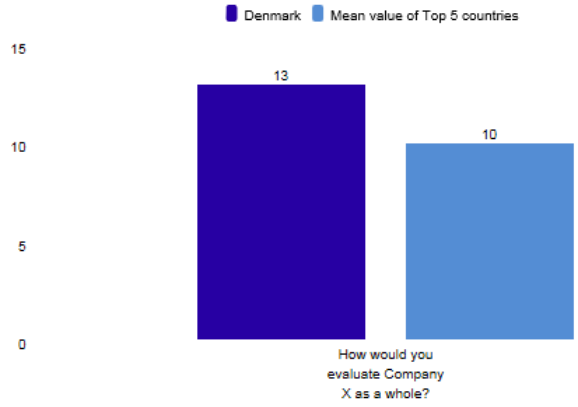
**Example 1: A brand tracker project.** The chart shows an "In Mind" question and a Mean value series has been added to show the mean value of all the brands.

*The column "Average in Mind value" in the chart below has been created by using the new Mean value series option.*




**Example 2: A customer satisfaction project.** The chart shows the result of a question, one column shows the result of the selected country and the other column shows a Mean value series based on the "Top 5 countries" in the company.

*The column "Mean value of Top 5 countries" has been created by using the new Mean value series option.*




The Mean value series can be shown together with the original series or on its own. The Mean value series can consider the base sizes in the original series or only be based on the calculated values.

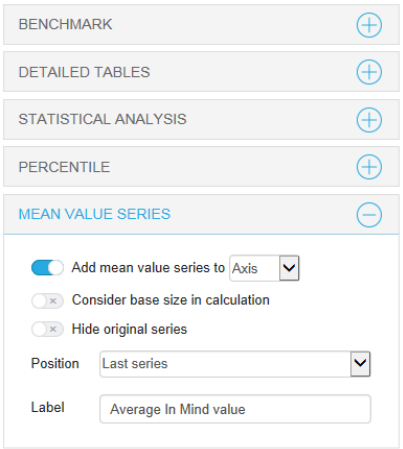
### 5.5.1 SETUP

The Mean value series can be added to all chart types in the StoryTeller except for the Scatter and Bubble.

The setup of the Mean value series is made in the Chart setup window in the Analysis tab. The following options are defined during the setup:

1) Should the Mean value series be added to the legend or the axis
2) Should the calculation of the Mean value series consider the base size of the ingoing series or not
3) Should the original series be shown or not
4) Should the Mean value series be added as first or last series in the chart
5) What should the label of the Mean value series be
6) What should the color of the series be (this option is only present when the Mean value series is shown in the legend)

*The image below shows the setup interface.*



## 5.5.2 CALCULATION

The value of the Mean value series is the mean value of the series shown in the chart. The base size of the original series is only considered if the option “Consider base size in calculation” has been enabled.

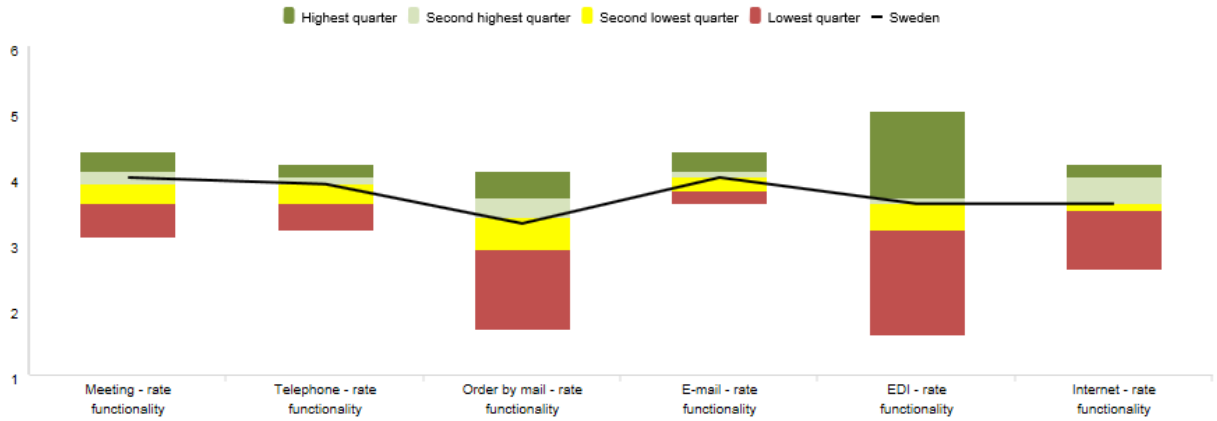
Series having been hidden due to low base sizes, etc, are not included in the calculation. It is only the series shown in the chart that are included in the calculation of the Mean Value series.

The Mean Value calculation uses unrounded values, rounding is only made in the last step.

## 5.6 NEW CALCULATION: PERCENTILE

A new feature for showing Percentiles based on aggregated results has been implemented in StoryTeller charts. It can be used in customer satisfaction survey for showing the ranges of the all the units in a survey for getting relevant benchmark figures as shown in the example chart below.

*The chart shows different questions in the X axis. The black line shows the result of the selected Unit in a company and the stacked columns show the 25, 50, 75 and 100 percentiles of all units in the company. By comparing the black line and the stacked columns the user can see how his/her performance relates to the other units in the company.*

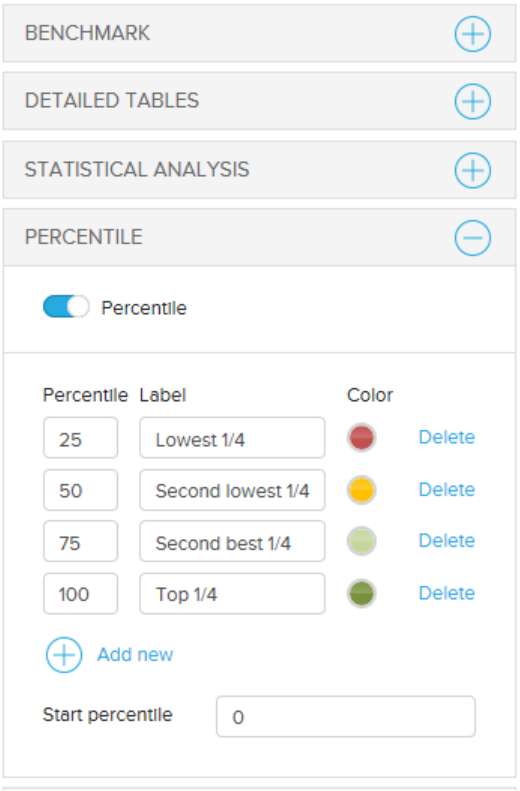



## 5.6.1 SETUP

The percentile calculation uses aggregated results shown in a chart and visualizes those as percentiles. The calculation is not using respondent level data (the used formula is shown in next chapter).

The setup is flexible. The number of percentiles shown in the chart, the colours and labels for each percentile are defined during the setup.

*The image below shows the setup panel of the Percentiles, it is located in the Analysis tab in the chart setup window.*




As shown in the setup image above, the Administrator defines a 'Start percentile. The 'Start percentile' is only defined if the selected chart type is an Area, Bar or Column as those types shows ranges of values (Line and Spline types do not visualize result in ranges so the definition of a start percentile is not enabled when those types are selected).

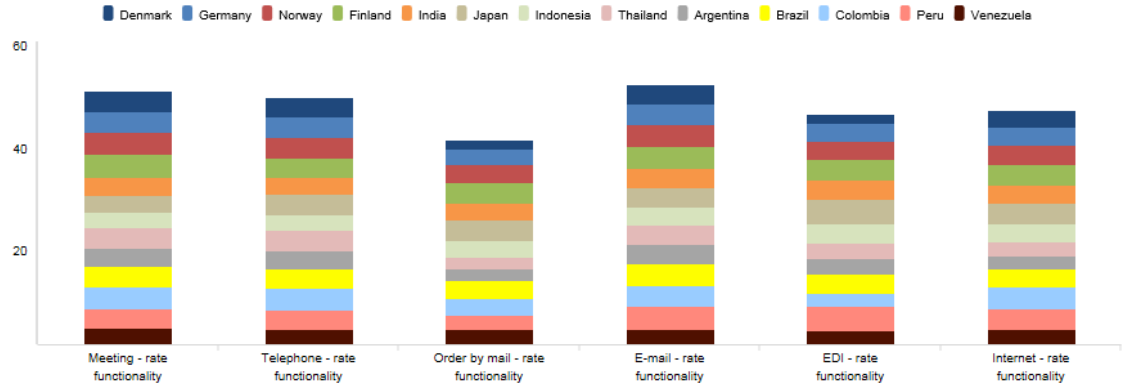
### 5.6.2 EXAMPLE OF SETUP

To create a chart like the one in the example above the two series have been used:

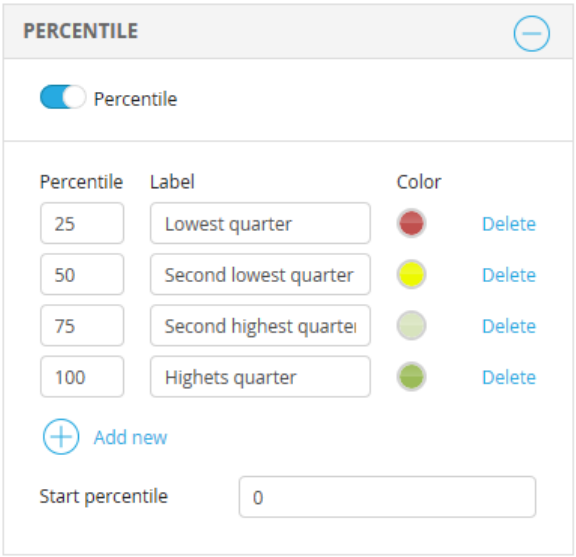
Series 1: used for showing the percentiles
Series 2: used for showing the result of the selected group (the black line).

The original layout of series 1 shows the result of all the units in the company and then the percentile calculation has been applied to visualize the result in percentiles instead of the result per unit.

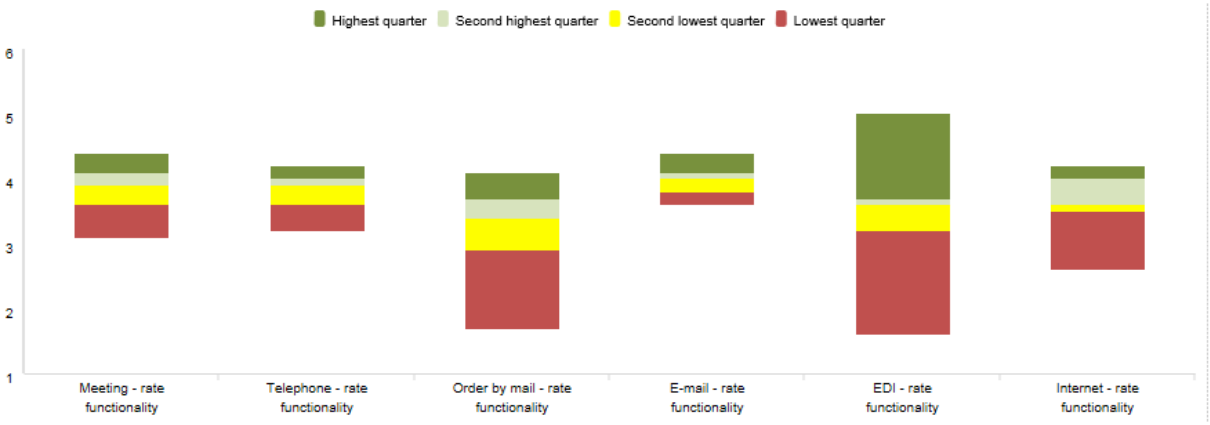
*The image below shows the original series 1, how it looked like before the percentile calculation was applied. The chart shows the result of each unit in the company in stacked columns.*




*The image below shows the percentile setup, as shown 4 percentile ranges are applied, the range from 0-25, the range from 25-50, the range from 50-75 and the range from 75-100.*




*The image below shows how series 1 looks like when the percentile calculation is applied, the result per unit has been replaced with the four percentiles.*



## 5.6.3 EXAMPLE OF DIFFERENT START PERCENTILES:

The “Start percentile” can be defined when using charts showing results in ranges (columns, bar, and area).

The first chart below shows one percentile defined as the 90th percentile and the start value has been set to 0. This means that the column shows the range from the lowest value to the 90th percentile. In the second image below, the start value has been set to 10 which means that the column shows the range from the 10th to the 90th percentile.

*Chart example 1.*

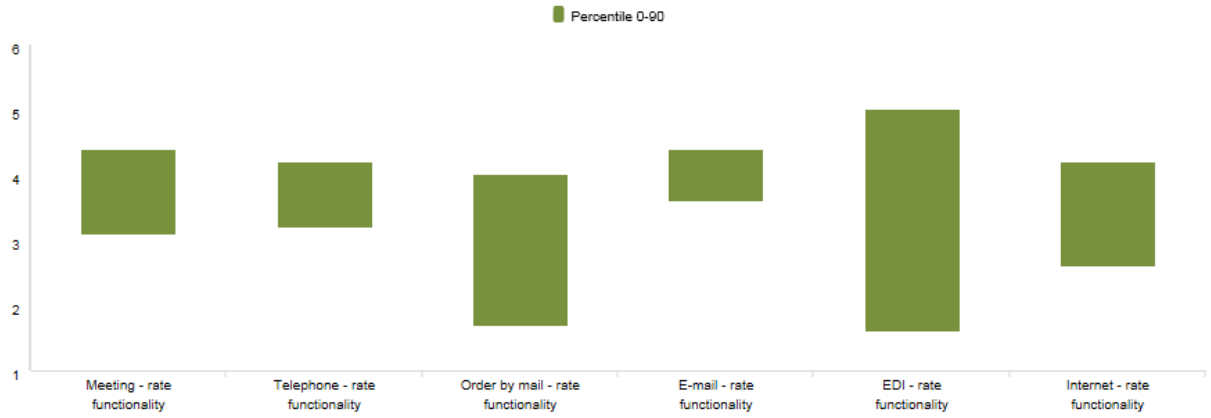
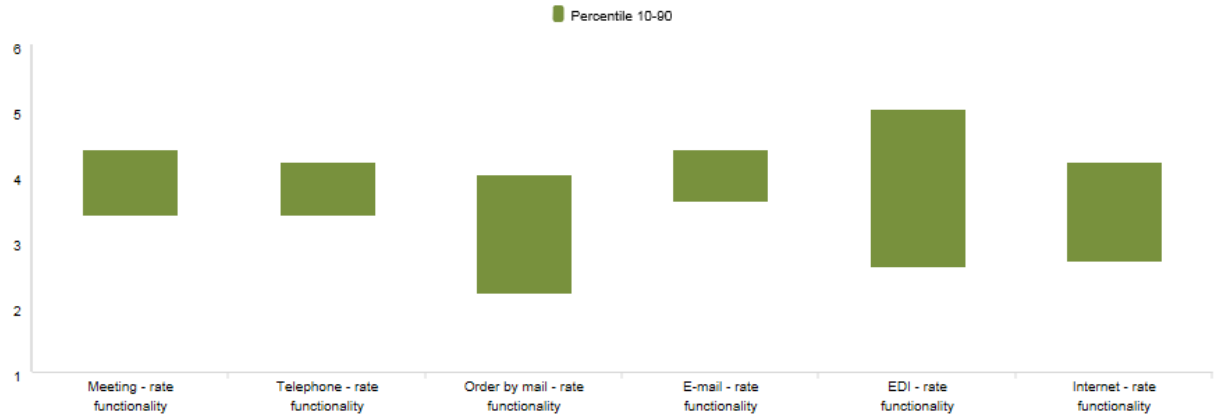



*Chart example 2.*




## 5.6.4 FORMULA

The formula shown below is used for calculating the percentile value. It is the same formula as being used in the Cross table tool and also in the Excel software

$$n = \frac{P}{100}(N-1)+1$$

## 5.7 NEW CALCULATION: GROUPING OF TRANSACTIONAL DATA

A new calculation setting has been added for handling data stored as transactions (see explanation further down). This makes it possible to calculate mean values of a respondent where data is stored in multiple rows in the imported data file.

The example data file below shows how a transactional formatted data file could look like. The file shows sales data from a store. When a client buys multiple items, the client is shown as one row per item in the data file. For example, if row 1-3 belongs to the same client, column C shows a "client ID" which makes it possible to find out which of the rows that belongs to the same client.

When reporting on this data file, one measurement could be the "Average sales per client". By using the original "Numeric mean value" calculation in our previous Dapresy Pro version, a mean value is calculated based on all rows in the data file and not based on all the clients which had given an incorrect result. Due to this, a new "Group Data by" function has been added with the purpose to calculate mean values of transactional data correctly.

*The table below shows a typical transactional formatted data file.*

| | A | B | C | D |
|---|---|---|---|---|
| 1 | Sales amount | Product | Client ID | Store |
| 2 | 10 | A | 1 | Store A |
| 3 | 20 | B | 1 | Store A |
| 4 | 30 | C | 1 | Store A |
| 5 | 40 | D | 2 | Store A |
| 6 | 10 | A | 3 | Store B |
| 7 | 10 | A | 4 | Store B |
| 8 | 20 | B | 5 | Store B |
| 9 | 40 | D | 6 | Store B |

### 5.7.1 CALCULATION LOGIC

When using the new feature "Group data by" the mean value is calculated by the grouped respondents and not per respondent. The example below explains the calculation.

**Example:**
The table above shows transactional formatted sales data. To get the "Average sales per client" the Sales Amount variable is used when creating a chart or table.

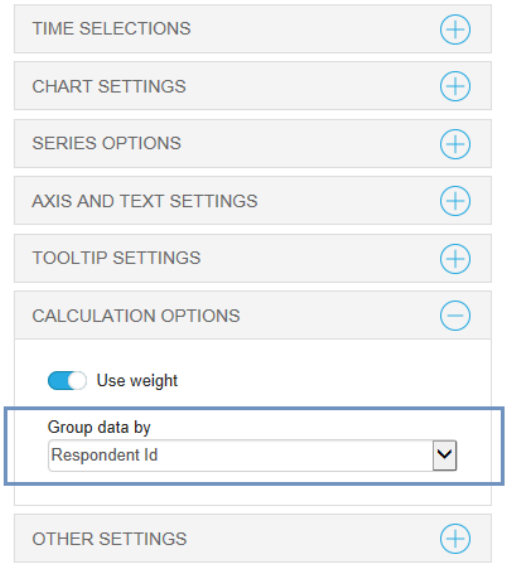
By using the original calculation logic the average sales per client for Store A is based by the number of rows which gives the result (10+20+30+40)/4= 25 which is wrong in this particular case as the wanted result is the average sales per client and not per row.

By using the "Group data by" option and selecting to group the data by the "Client ID" variable the mean value is based by the number of clients which gives the result (10+20+30+40)/2=50 which is correct in this particular case.

## 5.7.2 SETUP

A new control for selecting which variable to group the data by has been added to the Chart setup in the Settings tab as shown in the image below. The new control does only appear when Numeric variables are selected in the variable list. The variable selected in the "Group data by" list is used to group the data during the calculation. The default variable in the list is the "Respondent ID" which means that no grouping is made as each respondent has a unique id.

*The image below shows the new "Group data by:" selection list.*




## 5.8 HEAT MAP

Heat map is a new chart option in StoryTeller. A heat map is a graphical representation of data where the individual values contained in a matrix are represented as colours. The easiest way to understand a heat map is to think of a table or spread sheet, which contains colours instead of numbers.

The heat map function can be found under a new StoryTeller tab "Add Ons". The Heat map icon is visible all the time but enabled only for admin users having access to it.

After accessing the Add on, clicking the Heat Map will create a new heat map chart box in StoryTeller. Once created, the edit button, or right click on heat map box will allow access to detailed setup.

In Variables setup there are three different boxes:

- Legend
- X-Axis
- Y-axis

### 5.8.1 HOW TO SET UP A HEAT MAP CHART

SELECT A TYPE OF QUESTIONS YOU NEED TO SHOW BY USING FILTERING

SELECT QUESTIONS AND ANSWERS AND UPDATE PREVIEW

SELECT WHEAT YOU WANT TO HAVE ON THE X AXIS (INTERVAL OR QUESTIONS)/ANSWERS WILL BE ON Y AXIS

IN LEGEND YOU CAN SELECT TO HAVE ANSWERS, QUESTIONS OR NO LEGEND; FROM THE DROPDOWN

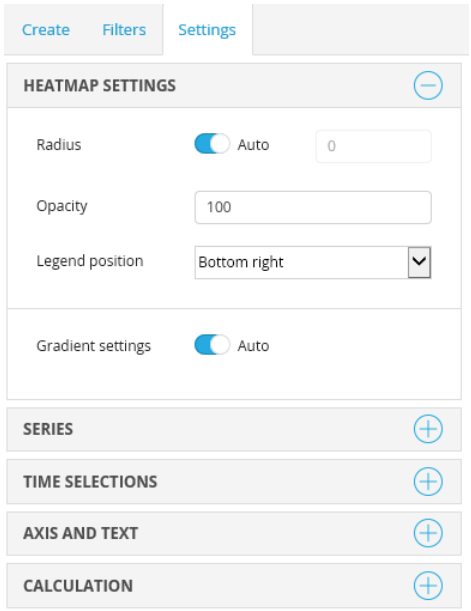
IF YOU WANT TO FILTER DATA THEN JUST CHOOSE FILTERS YOU WANT TO FILTER ON FROM THE FILTERS TAB

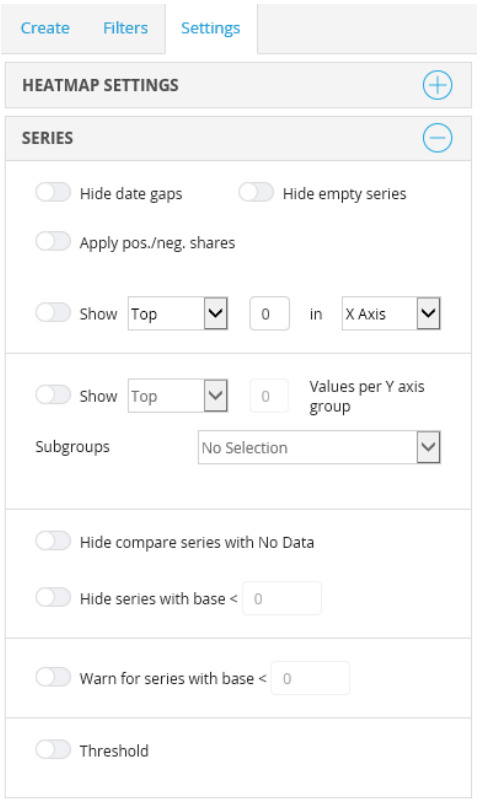
WHEN COMPARE IS ADDED THEN USER CAN CHOOSE IF SELECTED COMPARE FILTER WILL BE ON X-AXIS OR Y-AXIS COMPARE CAN ONLY BE PLACED ON X-AXIS OR Y-AXIS BUT NOT IN LEGEND.

### 5.8.2 SETTINGS FOR A HEAT MAP CHART

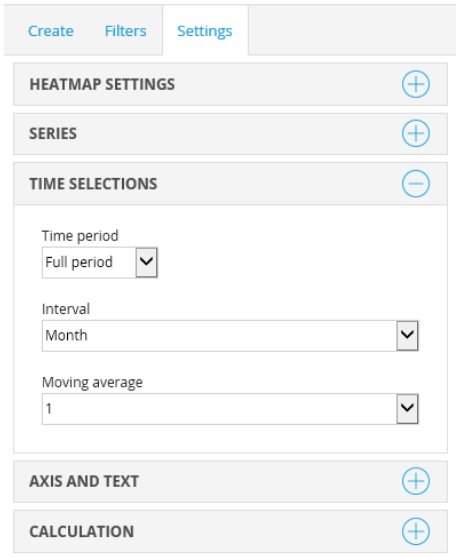
The following settings are available for Heat Map:

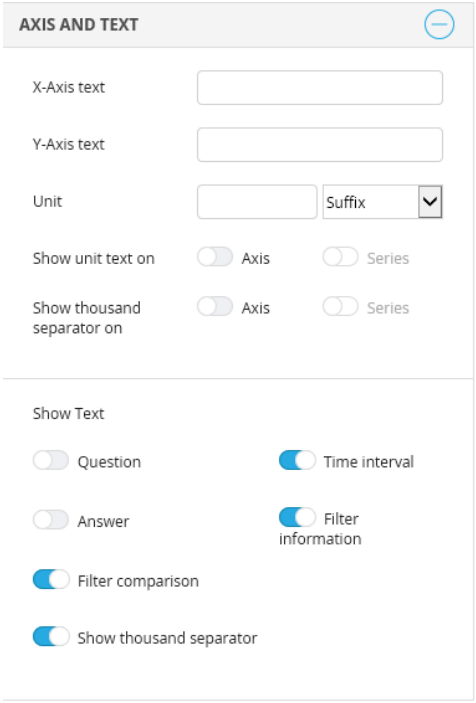
**Radius** for a heat circle, which can be automatically defined by using auto or user defined if auto is turned off and numeric value added to the box.
**Opacity,** the degree to which light is allowed to travel through the heat map, which can be set up from 0 to 100. The lower the value the opacity will be higher and the opacity of 100 means that the heat map objects will not be transparent at all.
**Legend** position will set the legend (if included) to Top or bottom, left or right.
**Gradient** settings can be automatic or user defined. User can define the stop value and colors which he wants to have in the heat map. The gradient stop value specifies an answer value color range used to fill a region within the heat map. These colors are defined by user under Color selection within the circle. Basically the user can say I want the red color to stop at value 20 and the blue at 10, adding new colors and defining stop values if preferred.

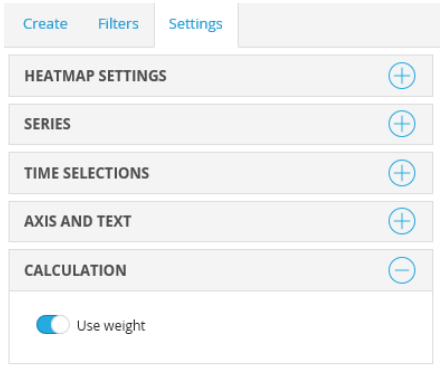



## Heat map box 11

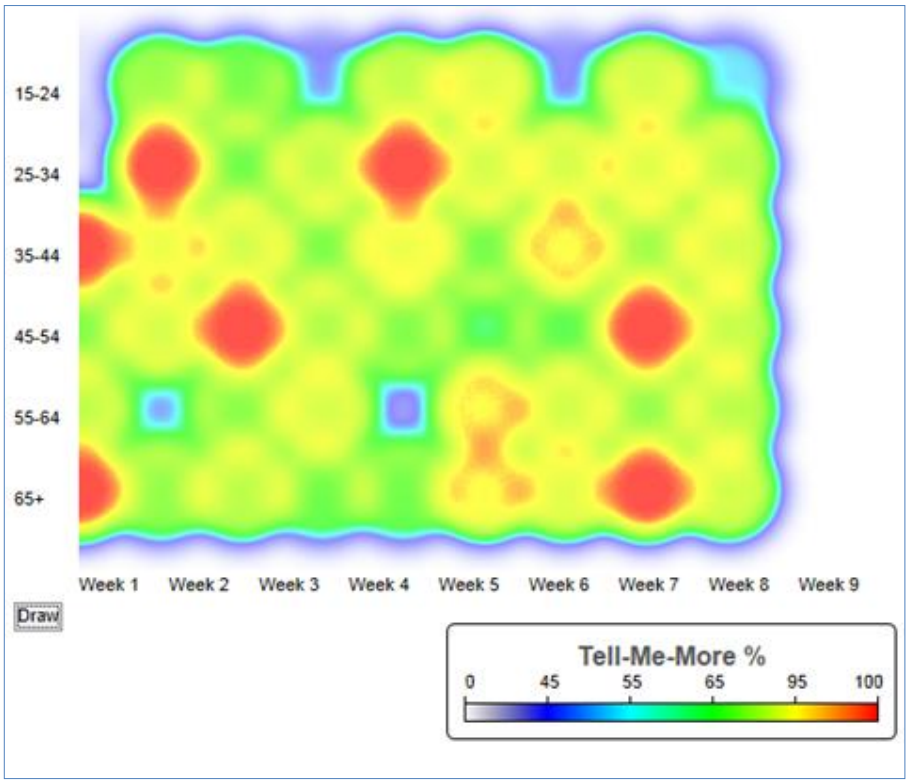


- Series section settings are identical to other chart settings
- Time selections: is identical to settings for other chart types
- Axis and text don’t have scale and thousands separator option, while other chart setting are available.
- Calculation settings are limited to having an option for weighted or non-weighted data
- The pre-generation of heat maps is also available

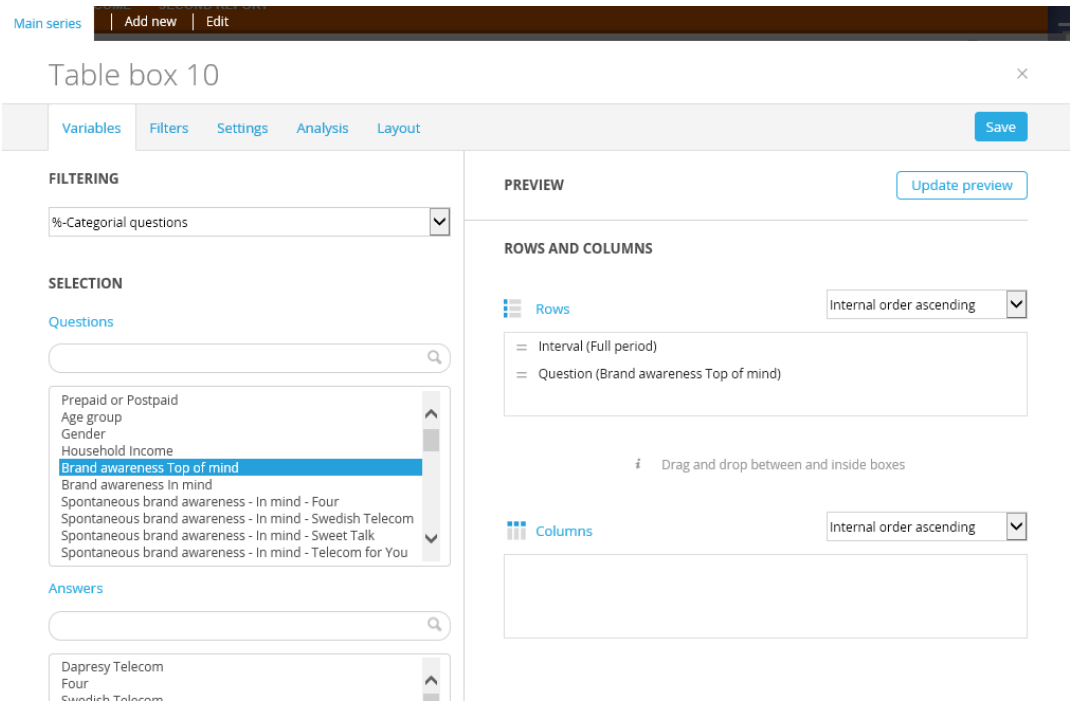
By updating preview user is able to see the result during setup:



# 6. TABLES – IMPROVMENTS AND NEW FEATURES

## 6.1 NEW USER INTERFACE

The new user interface has been developer for tables. The new interface provides more user-friendly navigation and it's visually intuitive as new features and functions are added.




## 6.2 USE OF CUSTOM IMAGES IN CELL FORMATTING

The cell formatting feature in the Cross table tool and StoryTeller tables have been improved to support images to complement formatting the figures/cells based on the values in the table. By using this new feature, InfoGraphic reports can widely be improved by showing different images like up/down arrows, happy/sad faces etc based on the underlying values in the table.

*The image below shows typical example where arrows are used to indicate changes since the previous time period.*

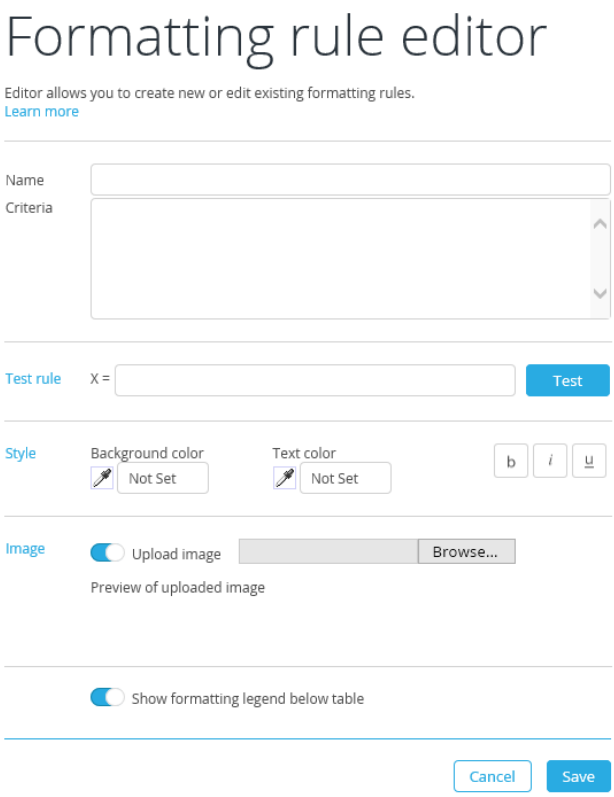
## 6.2.1 SETUP

The existing setup window for defining Cell formatting rules are used to add the images. As shown in the image below a new option has been added used for uploading the images.

To upload an image the following steps are made:

1. Define the criteria used to fulfill the limit for showing the image
2. Select the option “Upload Image”
3. Upload the desired image
4. Save

*The image below shows the setup interface.*




Note 1: the uploaded images will be shown in full size, which means that the image needs to be pre-configured and uploaded in the desired size to get nice looking reports.

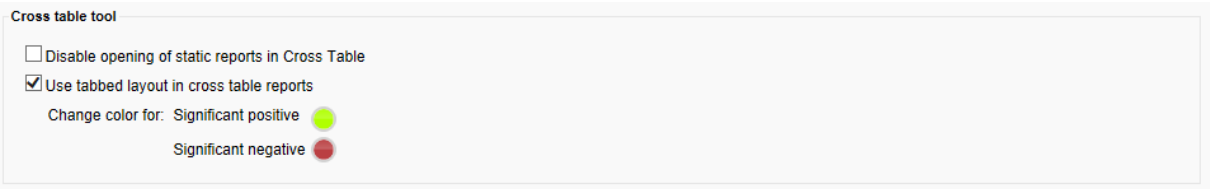
## 6.3 CHANGE COLORS OF THE SIGNIFICANCE TESTS INDICATION IN CROSS TABLES

When using the Cross table tool, the significance test result is indicated in green and red colors. Support for changing those to any color have been added, which makes it possible to further customize the table visualization.

### 6.3.1 SETUP

The color of the significance test is defined on a project level and not on a table level. The new controls for updating the colors are placed in the Project settings page as shown in the image below.

*The image below shows the new controls for defining the significance test colors in the Cross table tool.*




## 6.4 IMPROVED DECIMAL SEPARATOR AND THOUSAND SEPARATOR

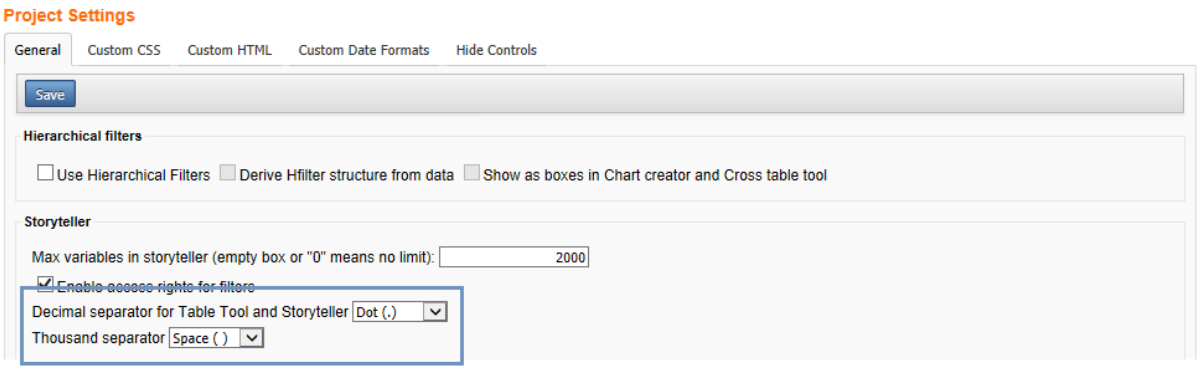
Now it is possible to define if the results in StoryTeller tables and Cross tables should be shown with thousand separators or not. This new setting makes it possible to define, on project level, the use of thousand or decimal separator. The new settings makes it easier to create tables which are easier to read and adapted to different cultures.

### 6.4.1 SETUP

The definition of what character to use as thousand and decimal separators are made in the Project settings page as shown in the image below.

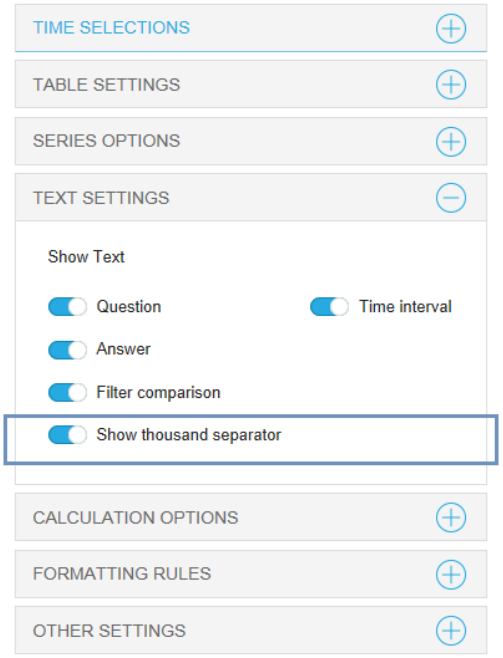
Comma, period or space can be used as thousand separator and comma or period can be used as decimal separator.

*The image below shows the new controls in the Project settings page.*

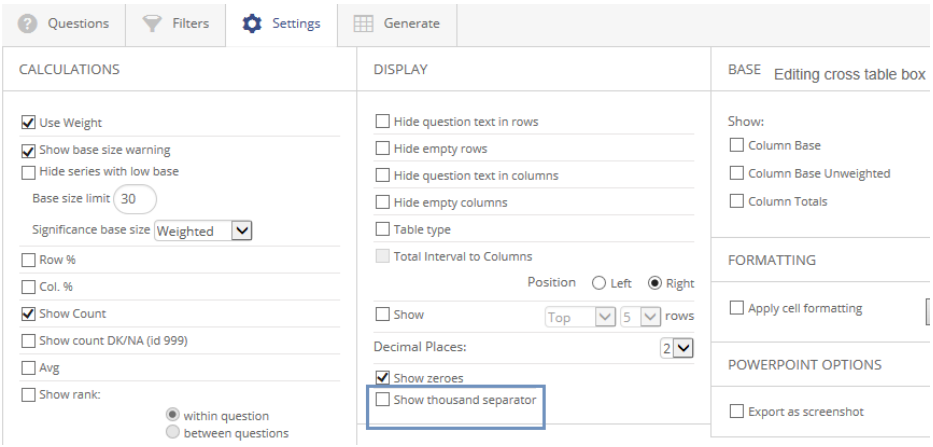



To apply the thousand separators to the Tables use the new controls shown in the images below.

*The image below shows the control used to apply the thousand separators to StoryTeller tables. The control is placed in the Settings tab.*




*The image below shows the control used to apply the thousand separators to Cross Tables. The control is placed in the Settings tab.*




## 6.5 NEW SUPPORT FOR ADDING MEAN VALUE SERIES

A new option for adding mean value series to a tables based on the shown result has been added. The feature can be used in a lot of different areas and project types and below are two examples.

**Example 1: A brand tracker project.** The table shows an "In Mind" question and a Mean value series has been added to show the mean value of all the brands.

*The "Average In mind value" column in the table below has been created by using the new Mean value series option.*

| Dapresy Telecom | Four | Swedish Telecom | Sweet Talk | Telecom for You | Duty Calls | Average In Mind value |
|---|---|---|---|---|---|---|
| 90.0% | 50.4% | 50.3% | 49.1% | 60.7% | 46.2% | 57.8% |

**Example 2: A customer satisfaction project.** The table shows the result of a question, one column shows the result of the selected country and the other column shows a Mean value series based on the "Top 5 countries" in the company.

*The "Mean value of top 5 countries" in the table below has been created by using the new Mean value series option. (Two separate table objects have been used, one for the column Denmark and one for the column Mean value top 5 countries).*

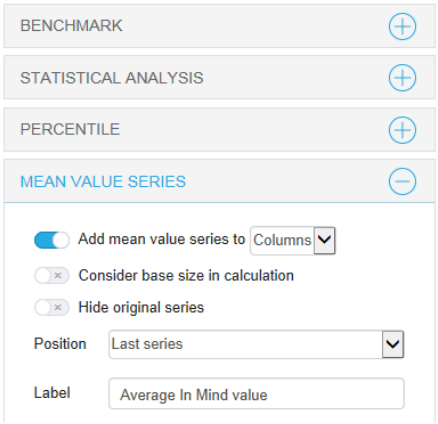
| | Denmark | Mean value of top 5 countries |
|---|---|---|
| How would you evaluate Company X as a whole? | 12.6% | 9.8% |

The mean value series can be shown together with the original series or on its own. The Mean value series can consider the base sizes in the original series or only be based on the calculated values.

The setup of the Mean Value series is made in the Table setup window in the Analysis stab. The following options are defined during the setup:

1) Should the Mean value series be added to the rows or columns
2) Should the calculation of the Mean value series consider the base size of the ingoing series or not
3) Should the original series be shown or not
4) Should the Mean value series be added as first or last series in the table
5) What should the label of the Mean value series be

*The image below shows the setup interface.*




### 6.5.1 CALCULATION

The value of the Mean value series is the mean value of the series shown in the table. The base size of the original series is only considered if the option "Consider base size in calculation" has been enabled.

Series that are hidden due to low base sizes, etc, are not included in the calculation. I t is only the series shown in the table that are included in the calculation of the Mean Value series.

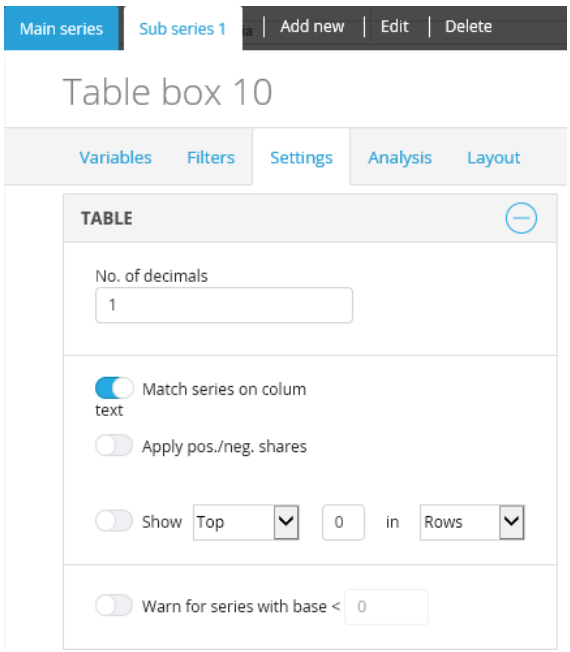
The Mean Value calculation uses unrounded values, rounding is only made in the last step.

## 6.6 MERGE SERIES IN TABLES

New setting is added in tables in StoryTeller. Now it's possible to merge series in same object into one table. Today each series in table is shown as one separate table.

*In case user creates a table in their dashboard wants to show a mix of categorical and numeric questions it's necessary to create each row as a series. This result in a table is showing correct numbers but when it comes to layout it was impossible to align numbers in columns. All columns are showing same column headers.*

The feature includes the option to merge all series having the same text in column headers. This makes as one table instead of one table per series. The new setting is added to Settings tab in tables for new subseries:




Default value is OFF for 'Match series on column text'. When 'Match series on column text' is ON then tables are shown as one and only column headers from first series are shown. Column headers in series match 100% to be able to merge tables.

### 6.6.1 EXAMPLE OF MERGING SERIES IN TABLES

If user creates two series showing one with % and another with average as below:

| | Dapresy Telecom | Four | Swedish Telecom | Sweet Talk |
|---|---|---|---|---|
| Spontaneous brand awareness - In mind | 90.0% | 50.4% | 50.3% | 49.1% |
| | Dapresy Telecom | Four | Swedish Telecom | Sweet Talk |
| Brand Consideration - Dapresy Telecom | 3.1 | 3.1 | 3.0 | 2.9 |

If Column texts are matching, it's required to 'merge series on column text' to be able to get one table and values in column to be aligned. When 'Merge on column text' is on for sub series 1 it looks like following:

| | Dapresy Telecom | Four | Swedish Telecom | Sweet Talk |
|---|---|---|---|---|
| Spontaneous brand awareness - In mind | 90.0% | 50.4% | 50.3% | 49.1% |
| Brand Consideration - Dapresy Telecom | 3.1 | 3.1 | 3.0 | 2.9 |

Like you can see on images above layout is applied after merge and rows are colored correct.

THE MERGED TABLE IS EXPORTED AS ONE AND NOT AS SEPARATE TABLES FOR BOTH EXCEL AND PPT EXPORT

# 7. OPTIONAL FILTER UPDATES

## 7.1 SEARCH FUNCTION IN SELECTION BOXES (REPORT USER VIEW)

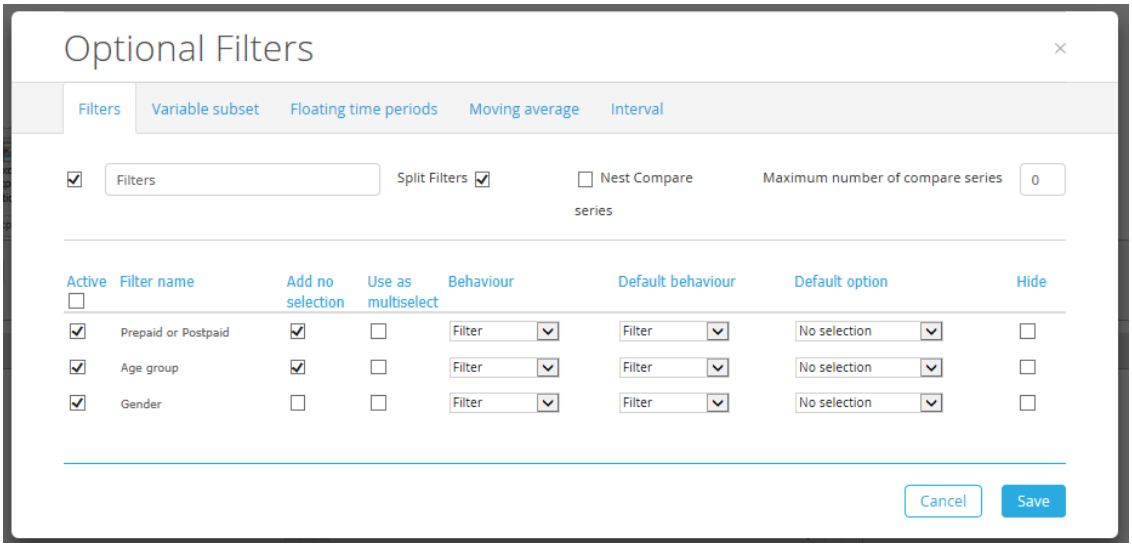
Search fields have been added to all Optional Filter selection lists to make it easier to find correct items in long filter lists. The search fields appear automatically in all projects and no setting needs to be activated.

*The image below shows the new search fields in the Optional Filter lists.*


## 7.2 LAYOUT UPDATE OF SETUP WINDOW

The setup window for Optional Filters has now been divided in tabs for a better usability.

The image below shows the new setup window, as shown one tab is used for each setup area. The new controls shown in the Filters tab are described in the following chapters.




## 7.3 IMPROVED SETUP OF "NO SLECTION" AND "USE AS MULTI SELECT"

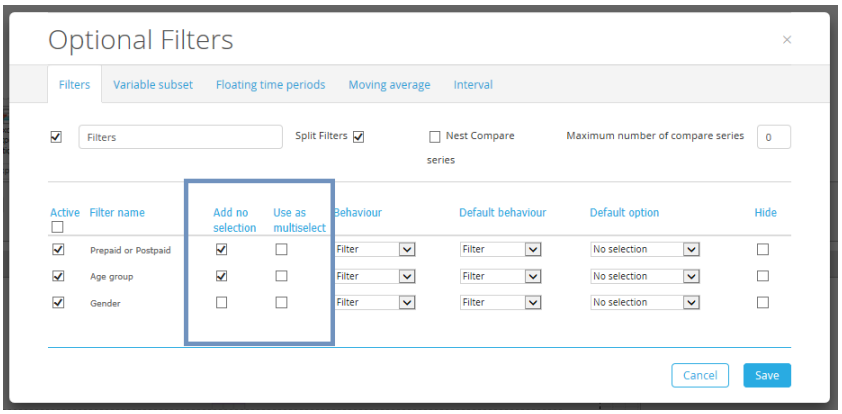
Improvements have been made which makes it easier to optimize the Optional Filters based on the current report needs. The following settings are now made per filter instead of per report.

- Use as multi select
- Add No selection

### 7.3.1 SETUP

The new controls for defining the "Add No selection" and "Use as multi select" per filter are highlighted in the image below.

*The image below highlights the new controls.*




Note: the new settings are only shown when the option "Split Filters" is active, if the filters are shown in one selection list (Split filter= not checked) the "No selection" and "Use as multi select" settings are defined once and not per filter.

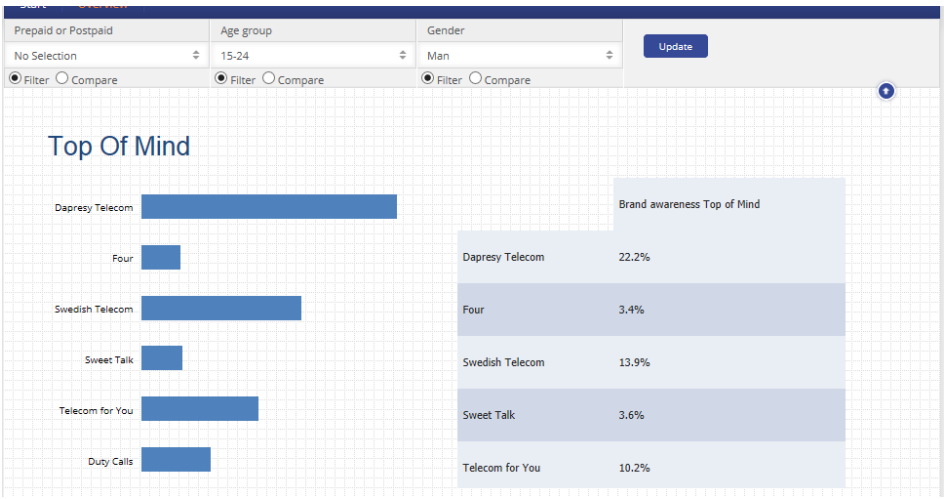
## 7.4 NEW OPTION FOR SHOWING SELECTED OPTIONAL FILTERS AS COMPARE SERIES

In the previous version of Dapresy Pro, the Optional Filters were used to filter the result. New logic makes it now possible to “compare” the selected Optional Filters to each other in charts and tables. The example below exemplifies the new possibilities.

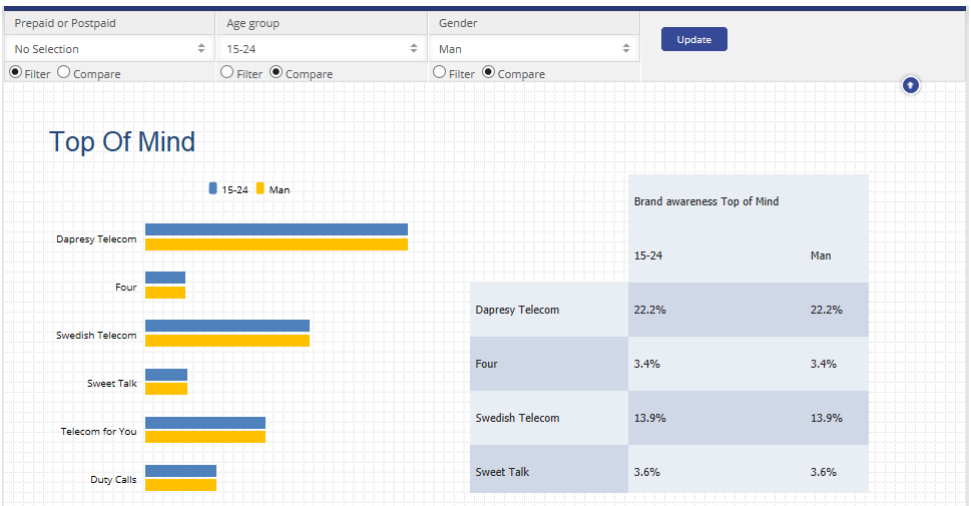
The Report shown in the images below shows a chart and a table. In the Optional Filter boxes, Male and Age 15-24 are used as **filters** in the first image and used as **compare series** in the second image. One series is created per selected Optional Filter when the option ‘Compare’ is selected. When the option ‘Filter’ is selected no extra series is created, the data is just filtered by the selected options.

In this particular example, the Report User can select between ‘Filter’ and ‘Compare’ but it is not mandatory since during the project setup it is defined which abilities the Report Users should have.

*In the image below the option “Filter” is selected which means that the result is filtered by Male and Age 15-24.*




*In the image below the option “Compare” is selected which means that one series is created for Male and one for Age 15-24.*



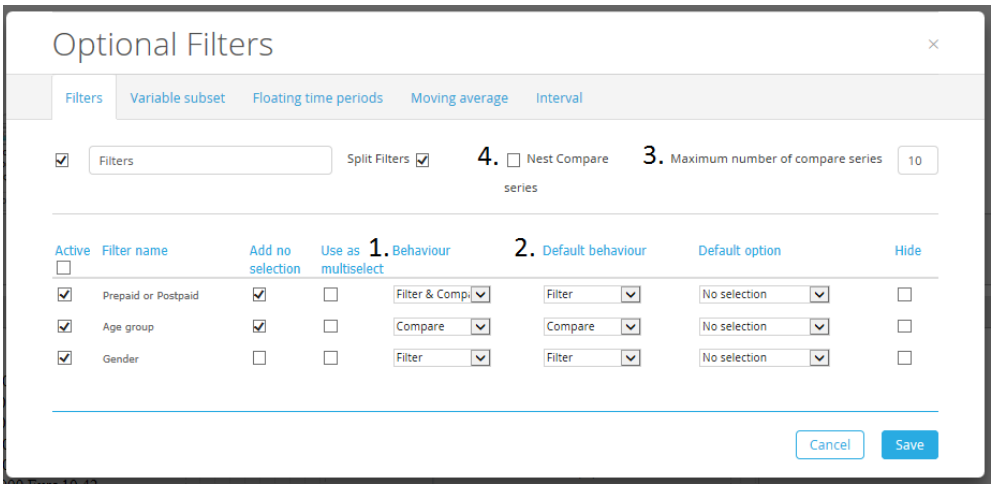
Note: The solution for using Optional Filters as Compare series is not supported in the Cross table object. It is only supported in the “Chart” and “Table” objects.

### 7.4.1 SETUP

In the Optional Filter setup window, the following settings relates to the new ability to use “Compare series” (the number in brackets refers to the image below the list):

- The behavior of the selected Optional Filters: Filter, Compare or should the Report User be able to select behavior (1)
- The default behavior if the user can select between Filter and Compare (2)
- The maximum number of allowed Compare series (too many series will break table layouts and make unreadable charts and tables) (3)
- Should selected Compare series from different filter boxes be nested or not (4)

*The numbers in the image below highlights the controls used for defining the behavior of the new Filter/Compare logic in Optional Filters.*




### 7.4.2 REPORT USER VIEW

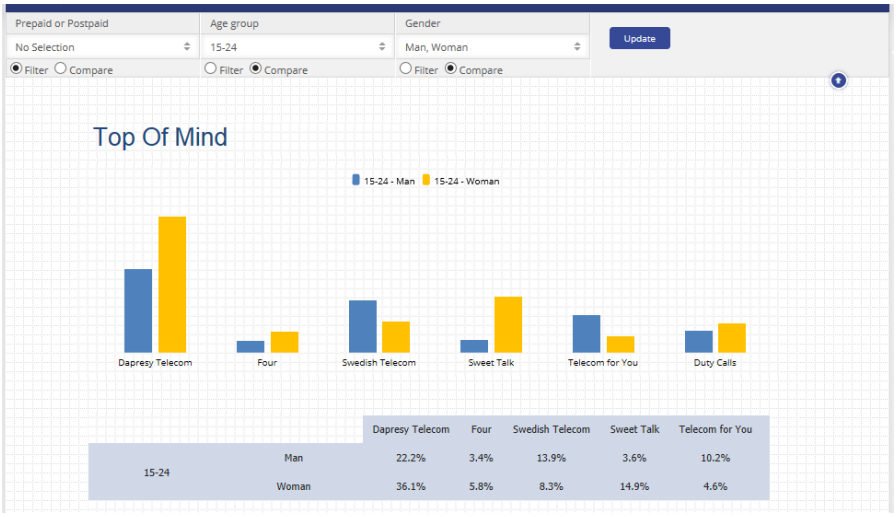
The controls for Filtering/Comparing are only shown in the Report User view if the Report Users have the ability to select between Compare and Filter. If an Optional Filter only supports one of the options (either Filter or Compare) no controls are shown.

### 7.4.3 NESTING LOGIC

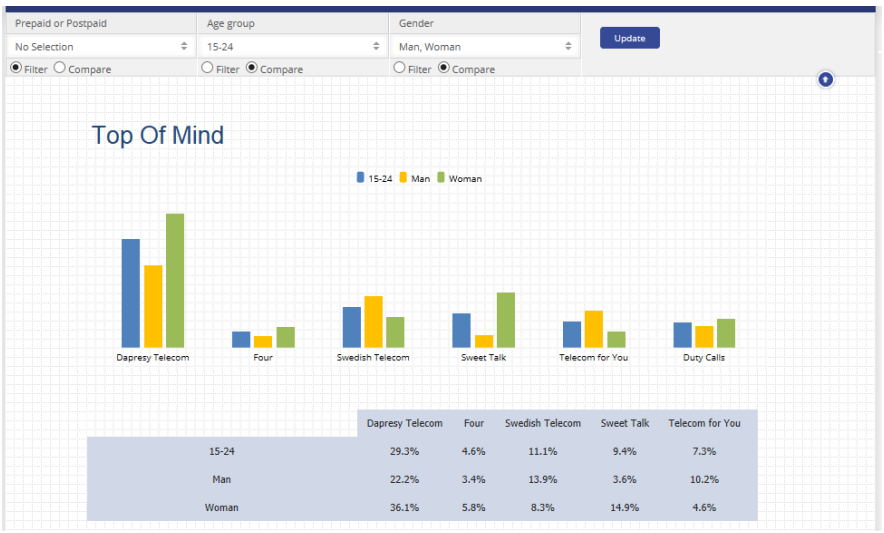
As explained previously, it is defined during the setup if the Compare series should be nested or not. The example below explains the difference between the options.

**Example**
Male, Female and Age 15-24 is selected in the Optional Filters. When the “Nest Compare series” is checked the selected options in the two boxes are being nested, the nesting results in two series as shown in the first image below. But when the option “Nest Compare series” is not checked, one series is created per selected option. This results in three series as shown in the second image below.

*The image below shows the result when the Compare series are being nested.*




*The image below shows the result when the Compare series are not being nested.*

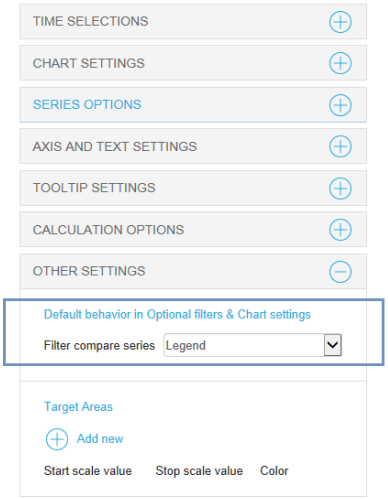



### 7.4.4 LOGIC FOR DEFINING POSITION OF COMPARE SERIS IN CHARTS AND TABLES

If the Optional Filters are used as 'Compare' series, the position of the compare series needs to be defined during setup of the chart and table objects. In charts it needs to be defined if the compare series should be added as Legend or Axis items and in tables it needs to be defined if new series should be added as rows or columns.

In both the chart and the table setup the behavior of the Compare series is defined in the "Settings" tab as shown in the image below.

*The image below shows the controls for defining the position of the Compare series in charts, as "Legend" is selected in this example all Compare series will be added to the Legend if Compare is used in the Optional Filters.*




## 7.5 EXCLUDE OBJECTS FROM OPTIONAL FILTERING

Objects such as charts and tables can now be excluded from one or multiple Optional Filters. This means that they are not affected by the filter selections made in those. The new setting can be used for many different purposes and below are two examples.

**Example 1, Using Optional Filters in projects with multiple data sources:**
A report shows results from a brand tracking survey, the result is reported together with the media spending figures (a second data source). Gender, Age and Media Type is used as Optional Filters. Gender and Age are survey variables and Media Type is a variable from a second data source.

The objects showing media spending results are being excluded from the Age and Gender Optional Filters and the objects showing the survey result are being excluded from the Media Type filter. By doing that the object showing the survey result will not be affected by the Media Type filter and vise versa.

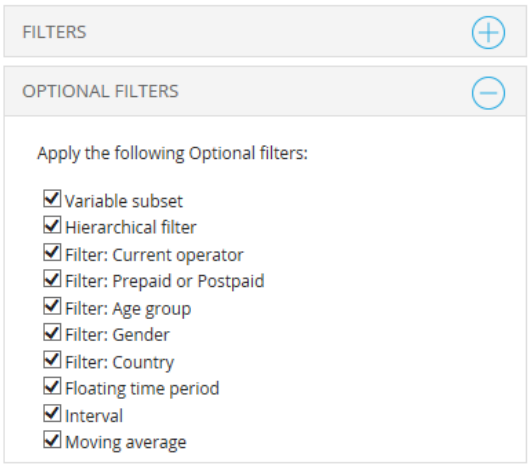
(In the previous version these variables could not have been used as Optional Filters as if Gender/Male had been selected the media spending result had been filtered out completely)

**Example 2, excluding objects for showing benchmark values:**
A report shows KPI's from a client satisfaction survey in multiple charts. Optional Filters are used to view the results for different segments but one chart has been excluded from the filtering which makes it possible to compare the results of the filtered segments against the company total.

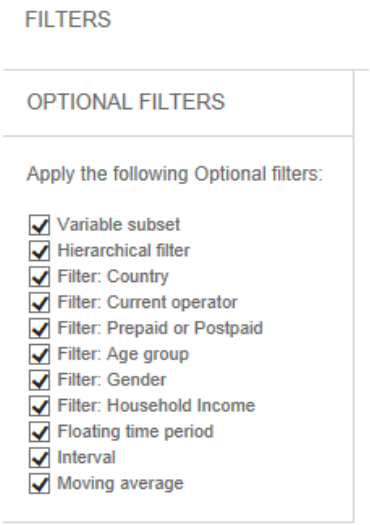
### 7.5.1 Setup

The new feature for excluding objects from the Optional Filters is supported in all the object types. The controls for excluding Optional Filters are placed in the setup window and placed in the Filter tab as shown in the images below. To exclude an object from the Optional Filters uncheck the desired Filters to be excluded.

*The image below shows the setup of the StoryTeller objects Table, Chart, Word cloud, Respondent data table and Dynamic images.*




*The image below shows the setup of the Cross table object.*

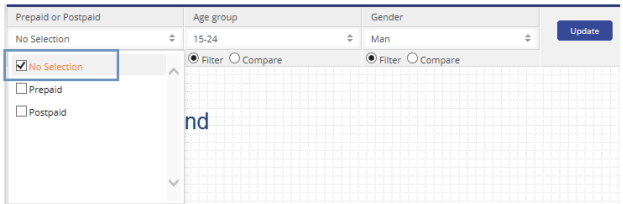



Note: In the StoryTeller charts and tables it is possible to use multiple series. The Optional Filter excluding setting is applied to the whole char/table, it is not a setting per series. Support for excluding Optional Filters per series is coming in a future version.

## 7.6 SUPPORT FOR UPDATING THE "NO SELECTION" LABEL

Support has been added for updating the label of the "No selection" option shown in the Optional Filter boxes. The new setting makes it possible to customize the label based on the project needs.

*The image below shows the "No selection" option in the Optional Filter boxes.*



## 7.6.1 SETUP

The text field for updating the text is placed in the Project setting page as shown in the image below. This means that the label is updated on a project level and not on an individual filter level.

*The image below shows the new control in the Project settings page for updating the "No selection" label.*


## 7.7 SET ACCESS RIGHTS TO FILTERS IN STORYTELLER

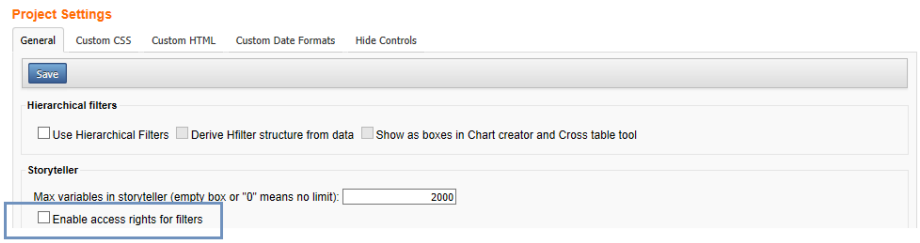
Support has been added for setting Report User access rights to ordinary Filters in the StoryTeller report. In the previous version, the access rights could only be set to different Hierarchical Filter units and not to ordinary Filters. The access rights to Filters are applied to both the Optional Filters and the "Optional Chart settings".

## 7.7.1 SETUP

To set access rights to ordinary Filters this feature needs to be activated in the project, it is not activated by default. If the feature is not activated the Report Users have access right to all.

Activation of the access to Filters is made in the Project settings page as shown in the image below. When the option is checked new controls appears in pages for managing the Report Users.

*The image below shows the new setting for activating access rights to Filters.*




The following pages have been updated with controls for setting access rights to ordinary Filters.

- Create Report User
- Edit Report user
- Excel upload of Report users

Two new screens have also been added:

- Report Users VS Filters
- Filters VS Report users

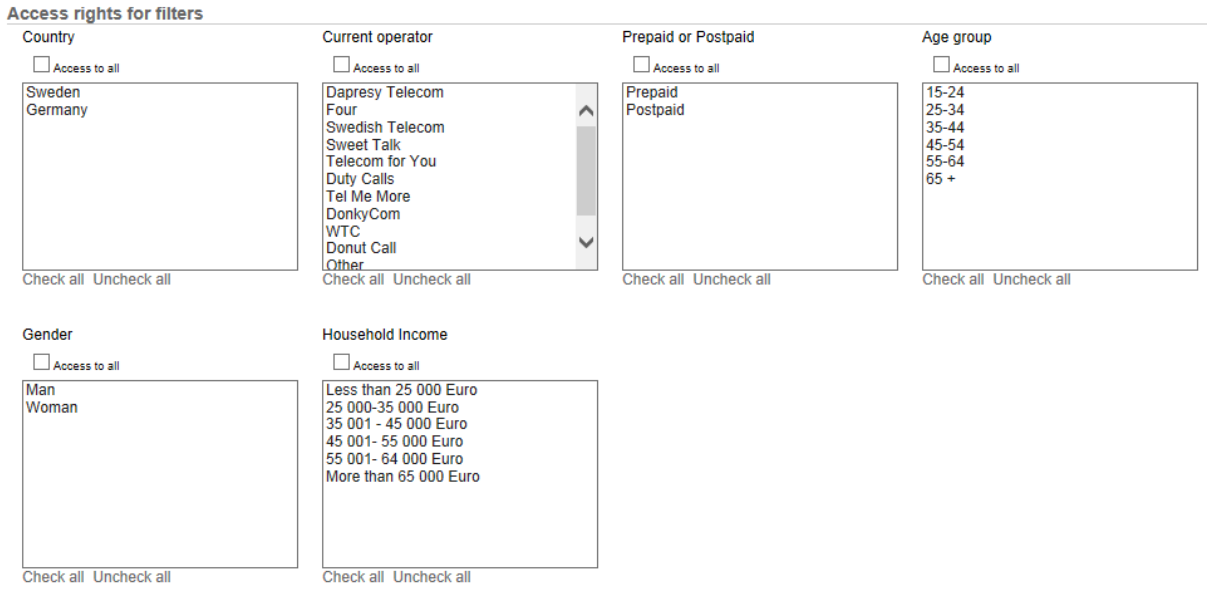
When setting the access rights to Filters a Report user can get access right to:

1. "All" answer option within a Filter variable including new options added in the future
2. One or multiple selected answers options within a Filter variable
3. The option "No selection" which is used in some of the Filter boxes depending of the setup

## 7.7.2 SETUP - CREATE/EDIT REPORT USER PAGE

When the feature for setting access rights to ordinary Filters is active, new controls appears in the Created/Edit page as shown in the image below. One selection box is shown per Filter. To give access right to a Filter Option select the desired options.

*The image below shows the new selection boxes for setting access right to ordinary Filters.*




## 7.7.3 SETUP - EXCEL UPLOAD OF REPORT USERS

When the feature for setting access rights to ordinary Filters is active, the Filter variables of the project are included in the Excel template that can be downloaded for creating users.

Each Filter variable is shown in a separate column in the Excel file as shown in the image below. The column headers are shown as “Code + Variable text”.

- By entering the text “Access to all” in a cell the user gets access rights to all existing and future Filter options in the current variable
- By leaving a cell blank the user gets no access right to any of the options
- By entering one or multiple answer ids (comma separated) the user gets access right to those answer options only
- If a Filter column is missing in the imported Excel file the users gets no access right to the missing Filter variable.

*The image below shows an example of an Excel file including columns for setting access rights to Filters.*

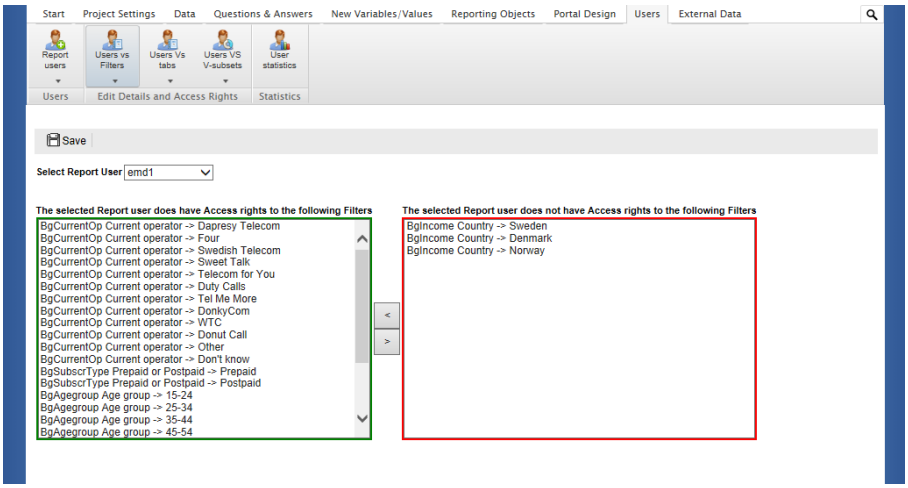
| I | J | K | L | M | N | O | P |
|---|---|---|---|---|---|---|---|
| gskassa | 5 - Lagerstatus | 6 - Kassationer | 7 - Rabatteringar | 8 - Butiksöversikt | Q1 - Gender | Q213 - Age groups | |
| | Access | Access | Access | Access | Access to all | 1,3 | |
| | Access | Access | Access | Access | All | | |
| | Access | Access | Access | Access | 1,2,3,4 | 4,5 | |
| | Access | Access | Access | Access | Access to all | 1,2,3 | |

## 7.8 SETUP - REPORT USERS VS FILTERS PAGE

The access rights to Filters can also be controlled in the two new pages “Report users Vs Filters” and “Filter Vs Report Users”.

The logic in the new pages is the same as in the similar pages for setting the access rights to reports and Hierarchical Filters.

*The image below shows the new page “Report Uses Vs Filters”. As shown the Filter options are shown as “Question code + Question text + Answer text”.*




## 7.8.1 REPORT USER VIEW – OPTIONAL FILTERS

In the Optional Filter boxes shown in the Report user view, only the Filter options the User has access rights are shown. The Filter options the user does not have access right are hidden completely.

If a Report User does not have access rights to any Filter option in a Filter box the whole Filter box is hidden. The Filter box is also hidden if the Report User only has access right to one option in a Filter box.

**Example:**

1. The Optional Filter content looks like the image below. If a Report User only has access rights to “Male” in the Gender Filter box, the whole box is hidden but the data is always filtered by Male.

2. If the user does not have access right to any option in the Age box the box is hidden and no filtering is done by any Age option (filtering is only made by the options the User has access right to and if the user don’t have access right to any option in a Filter variable that Optional Filter is being ignored*)

*The image below shows the Optional Filters used in the two examples above.*

| Country | Gender | Age |
|---|---|---|
| **Sweden** | No selection | 15-30 |
| Holland | **Male** | **31-45** |
| Germany | Female | 46-64 |

*Note: The access right does only apply to Optional Filters and Optional Chat settings. If a chart/table itself has been filtered by for example Age 15-30 in the example above that filter is still applied as it has nothing to do with the access rights to the Optional Filters/Optional Chart settings.

### 7.8.2 REPORT USER VIEW – OPTIONAL FILTERS – DEFAULT FILTER LOGIC

If a Report user does not have access rights to the Filter option defined as default, the selected on page will load the first Filter option the user has access rights as default.

**Example:**
The image below shows the Optional Filters in a report. The bold options are default selected on page load due to the setup. When a Report User with access rights to the countries Holland and Germany enters the report, the country Holland is default as Holland is the first Filter the user has access right to.

| Country | Gender | Age |
|---|---|---|
| **Sweden** | No selection | 15-30 |
| Holland | **Male** | **31-45** |
| Germany | Female | 46-64 |

### 7.8.3 REPORT USER VIEW – OPTIONAL CHART SETTINGS

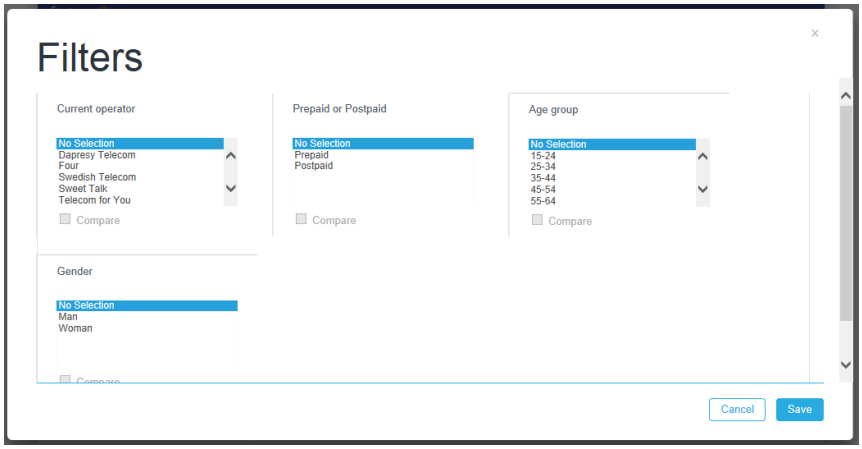
In the Optional Chart settings Filter page, only the Filter options the Report User has access rights to are shown. The filters the user does not have access rights to are hidden completely.

If a Report User does not have access right to any Filter option in a Filter variable the whole Filter box is hidden. The Filter box is also hidden if the Report User only has access right to one option in a Filter box.

**Example 1:** The Filters in the Optional Chart settings look like the image below. If a user has access right to "Male" in the Gender Box the whole box is hidden but the data is still filtered by Male.

**Example 2**: The Filters in the Optional Chart settings look like the image below. If a user does not have access right to any option in the Gender Box the whole box is hidden and no filtering is made by the Gender box unless the chart itself is filtered by for example Male.

*The image below shows the Optional Chat settings used in the examples above.*



## 7.9 SET DEFAULT HIERARCHICAL UNIT PER REPORT USER

Support has been added for selecting a default Hierarchical Filter if the user has access rights to multiple units. The new option creates a more user friendly flow where the users sees his/her own result in the first view without having to select the unit in a selection list.

Note: the “default unit” logic is only applied in the first report the Report Users enters as when navigating to the next report the current selection is maintained and applied automatically.

### 7.9.1 SETUP

A new control for setting the default Hierarchical Filter unit per Report User has been added to the following pages:

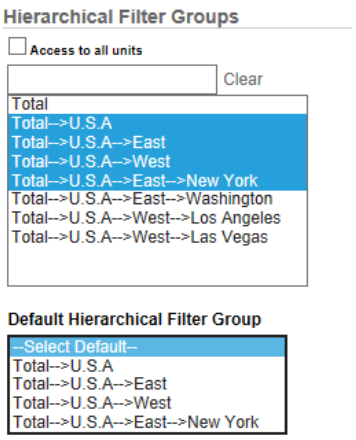
- Create/Edit Report User
- Report Users VS Hierarchical Filters
- Upload Reports Users via Excel file

As a default setting the “highest” unit the Report User has access right to is the default one so the new controls do not need to be considered if that is the desired behavior.

### 7.9.2 CREATE/EDIT REPORT USERS

A new list for selecting the default unit has been added as shown in the image below. The list contains the units the user has access right to. The list shows the whole path of the unit as multiple units can have the same names.

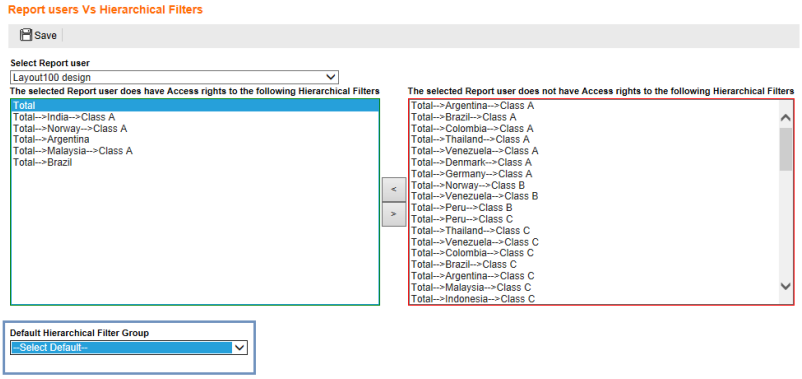
*The image below shows the new control for defining the default unit.*




### 7.9.3 REPORT USERS VS HIERARCHICAL FILTERS

A new dropdown list for selecting the default unit has been added as shown in the image below. The list contains the units the user has access right to. The list shows the whole path of the unit as multiple units can have the same names.

*The image below shows the new control for defining the default unit.*

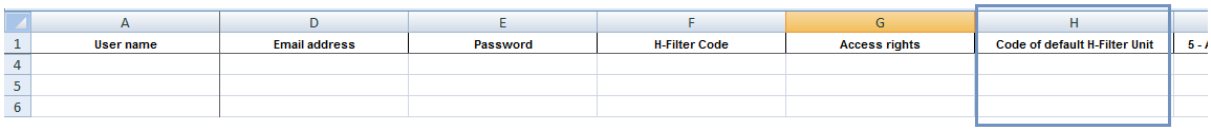



## 7.9.4 EXCEL UPLOAD OF REPORT USERS

The Excel template has been updated in Hierarchical Filter projects. A new column named “Code of default H-Filter unit” has been added. The code of the unit to be the default selected one is defined in this column.

The cells can be empty. If no default code is entered, the “highest” unit the user has access right to becomes the default one automatically.

*The image below shows the new column for defining the default unit.*



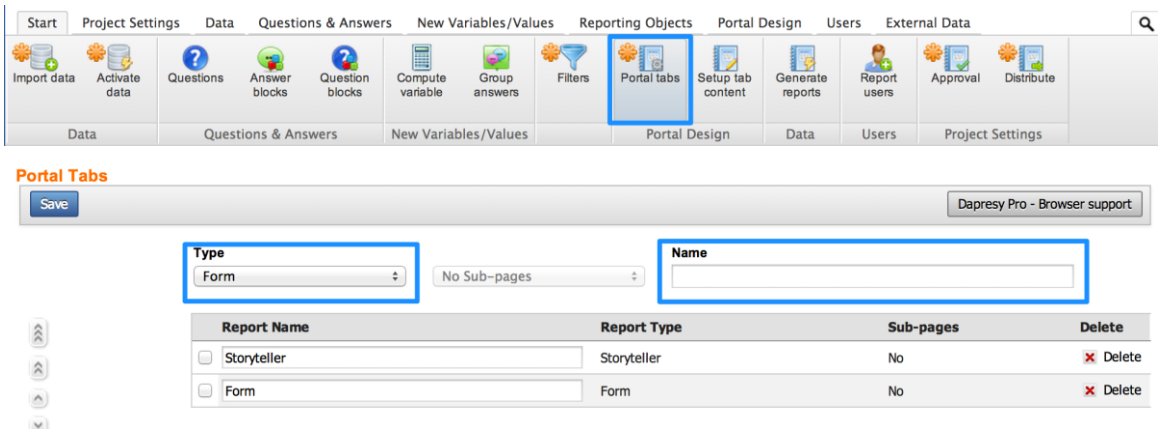
| | A | D | E | F | G | H |
|---|---|---|---|---|---|---|
| 1 | User name | Email address | Password | H-Filter Code | Access rights | Code of default H-Filter Unit |
| 4 | | | | | | |
| 5 | | | | | | |
| 6 | | | | | | |

# 8. ENTERPRISE FEEDBACK MANAGEMENT (EFM) MODULE

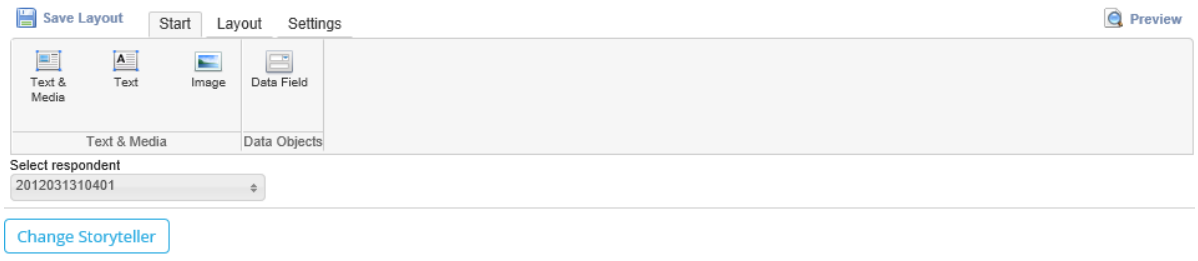
The Enterprise Feedback Management (EFM) module enables users to get real time event driven, satisfaction score monitoring to provide rapid attention to issues as they arise. The users can create EFM alerts based on survey results. The alerts are reported in the Dapresy dashboard and specified managers can be automatically notified. This new module consists of two new functions in Dapresy. They are 'Input Variable' and a new portal tab called 'Form'.

## 8.1 NEW REPORT TYPE - FORM

To create a 'Form', go to the Portal Tabs button and choose 'Form' in the dropdown list. Give the form a name & click save.



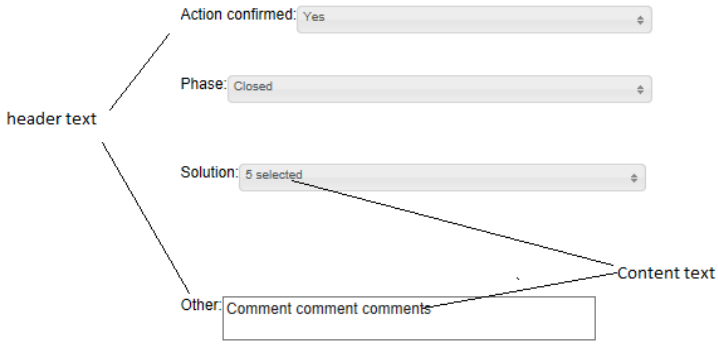

Launch the Design/Preview reports to configure your 'Form' portal tab. The 'Form' portal tab has the same layout and styling fucntions of a StoryTeller portal tab. This allows for a customized form and a familiar interface. Once you are in your new Form portal tab you can easily add your input variables buy clicking on Data Field.



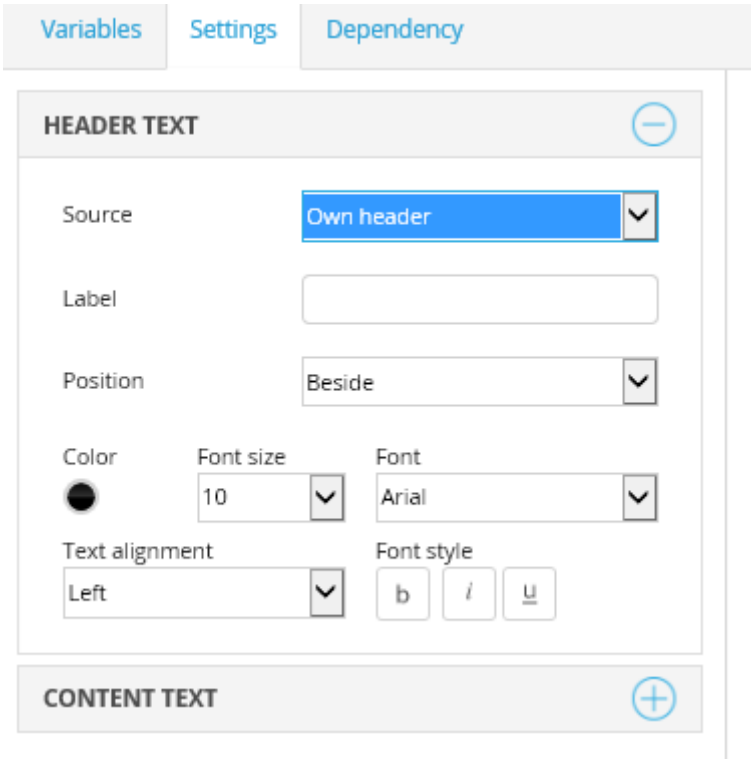

Once you add your new field, you can edit the element to define your input variable. Select one of the newly created input variables, and choose to show or not show the Variable text. If you have the need to style your variable text choose to NOT show it. Then you can use a separate text box to label your Data Field and style as needed

### 8.1.1 LAYOUT Setup

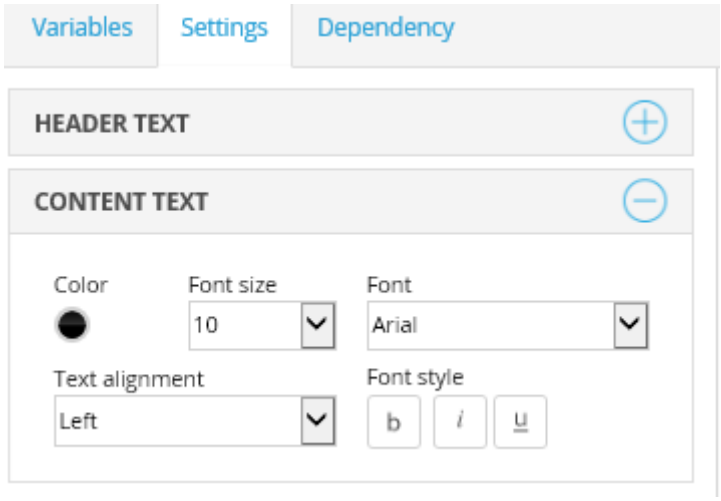
The text size, Font and Text colour are possible to define both for the header text and the content (see image below).




A new tab for defining the layout of the Data Field is added to the Data Field setup view. The new tab “Layout” contains 3 panels; one for defining the header text, one for defining the content text and one for defining the selection type. The image below shows the “Header text” panel, the selection for defining if a header should be shown or not has been moved from the “Variable” tab into this new tab/panel. In the Font selection box the same Fonts as in the “respondent data table setup” are shown.

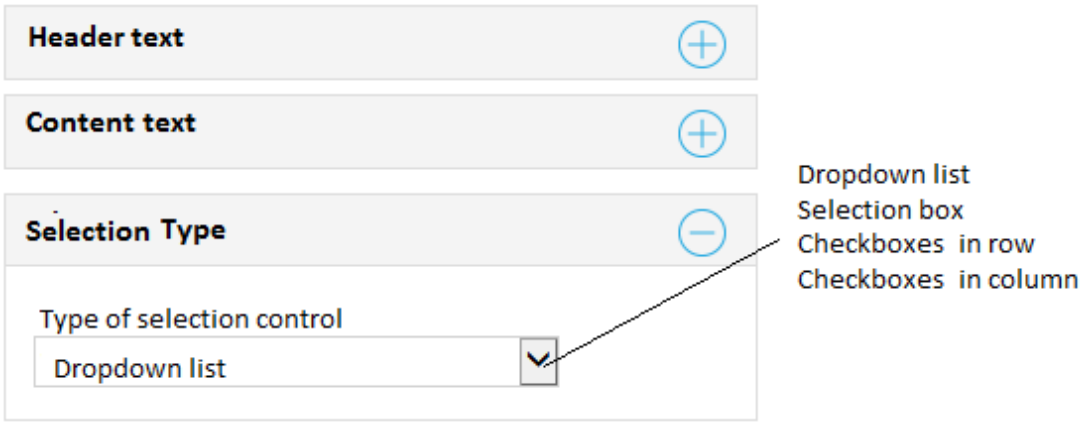



*The image below shows the “Content Text” panel.*

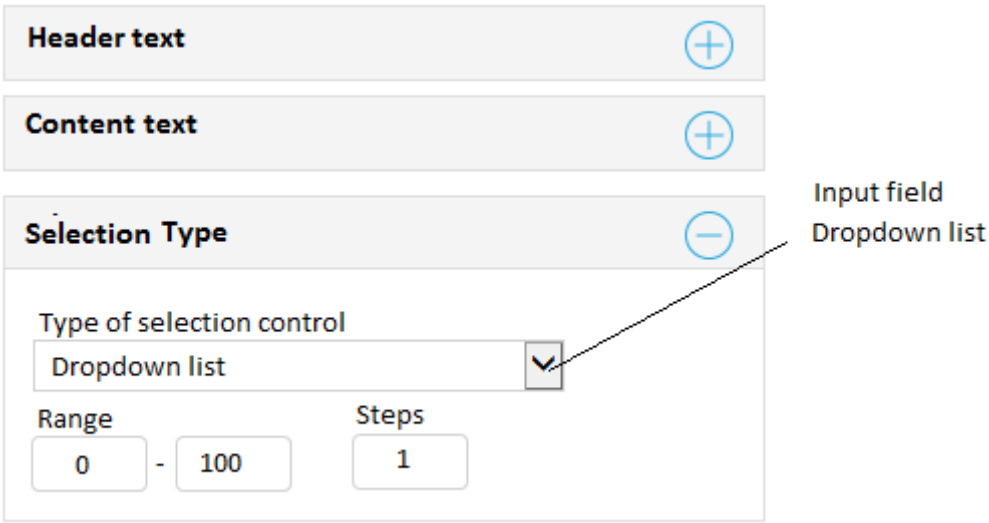



*The image below shows the "Selection Type" panel when a Categorical Single choice variable is selected in the Variable tab.*


*The image below shows the "Selection Type" panel when a Categorical Multiple choice variable is selected in the Variable tab.*




The image below shows the “Selection Type” panel when a Numeric variable is selected in the Variable tab. As shown, the user can select between an input field and dropdown list. If selecting dropdown list the range and steps must be defined. In the example below the dropdown list will show 0, 1,2,3,4...98, 99,100

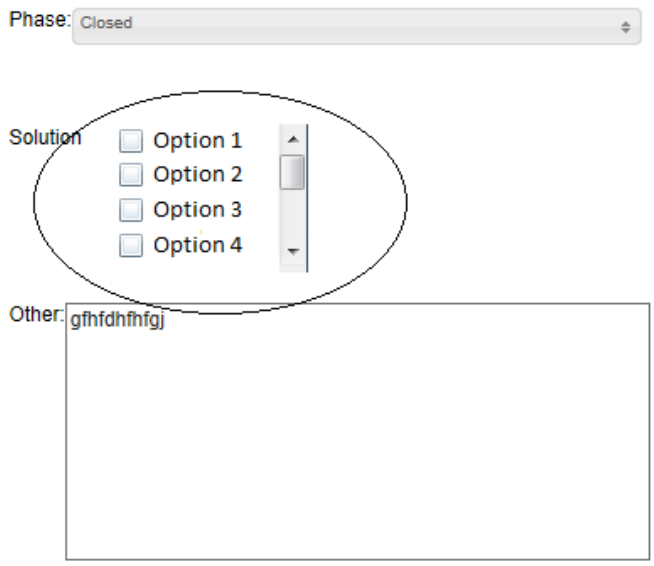



**Note 1:** If the selected variable is a STRING variable no settings are available in the “Selection type” panel, a STRING variable is always shown as a text box.

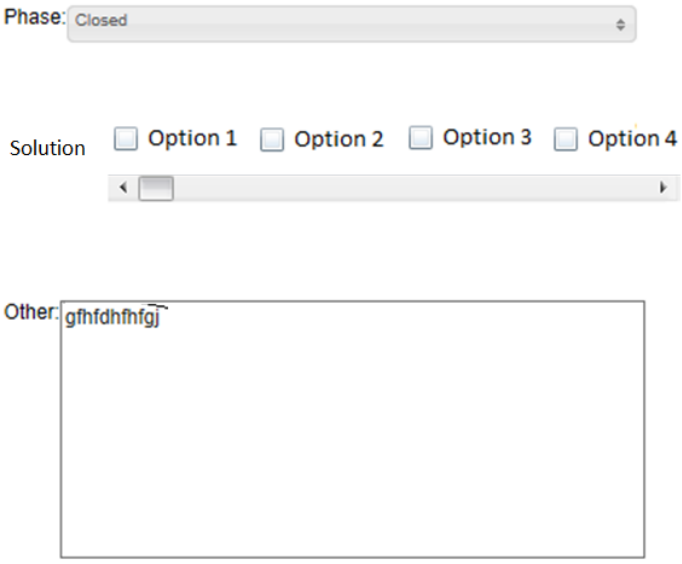
**Note 2:** If the selected variable is a DATE variable no settings are available in the “Selection type” panel, a Date variable is always shown as an Input Field/Calendar control.

**Note 3:** If the size of the Data Field is not big enough when the layout options Checkboxes/radio buttons are selected a scrollbar must be shown like in the examples below.

**Example 1**




**Example 2**




## 8.1.2 CUSTOMIZE DATA FIELDS IN THE FORM REPORT

The layout of the Data Fields in the Form report is now more flexible and contains the following options to select during the setup:

- Type of selection list (dropdown list, check boxes, selection box etc)
- Text size and Text color
- Font
- Header position (left or above)
- Support for adding own header instead of using the Variable text as header

## 8.2 CREATING INPUT VARIABLE IN DATE FORMAT BASED ON EXISTING INPUT VARIABLES

When creating an Input variable, it is possible to select variable type The following were supported in the previous version:

1. Categorical single choice scale
2. Categorical single choice non scale
3. Categorical multiple choice
4. Numeric
5. Open ended

Now with the current upgrade there is an option to use the DATE type as well.

### 8.2.1 SETUP

When creating a Date variable it is possible to create following expressions:

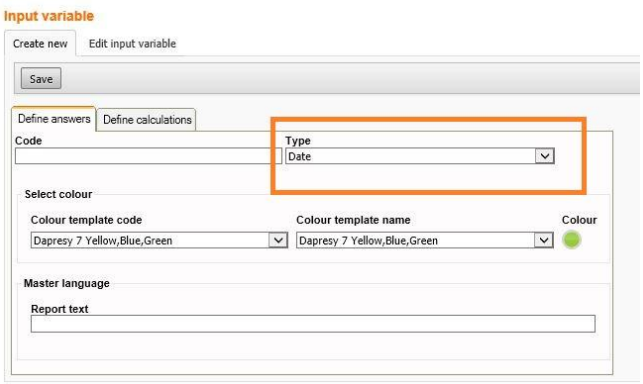
- Leave expression empty → No DATE is inserted (it will be inserted in the FORM report by the Report users)
- Inserting a fixed date
- Copying a DATE from another DATE variable
- Computing a new DATE based on another DATE variable

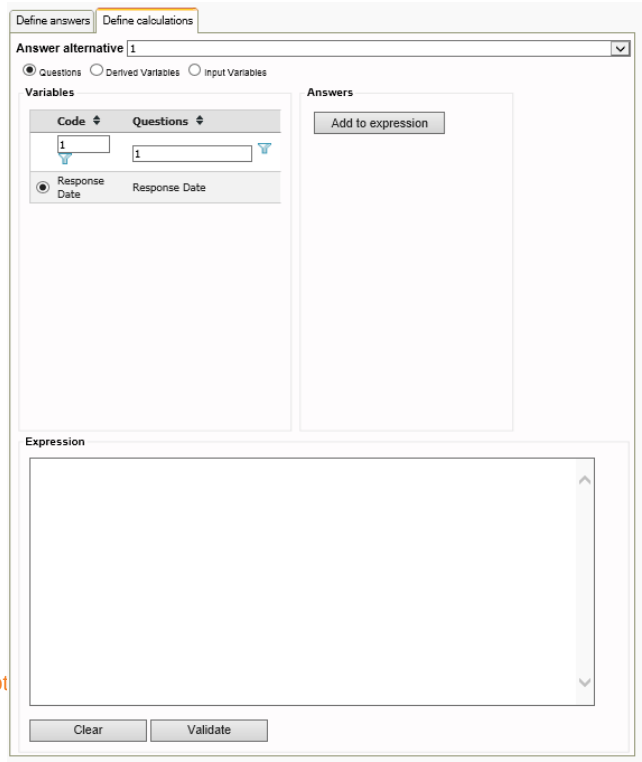
To add a **fixed date** the desired date is simply entered in the expression. Example: "2011-02-01"

To **copy a date** from another date variable the desired Date variable is selected in the variable list, when clicking “Add to expression” the selected variable is added to the expression box. Example: ⧼1100000000001-Response Date⧽

To **compute a new date based on an existing date variable** the desired Date variable is selected in the variable list and added to the expression box, the number of days to add is also entered in the expression box. Example: ⧼1100000000001-Response Date⧽ + 4

By using this logic the date in the new variable becomes 4 days bigger than the date in the Response date variable. The image shows the “Define answers” and “Define calculation” tabs



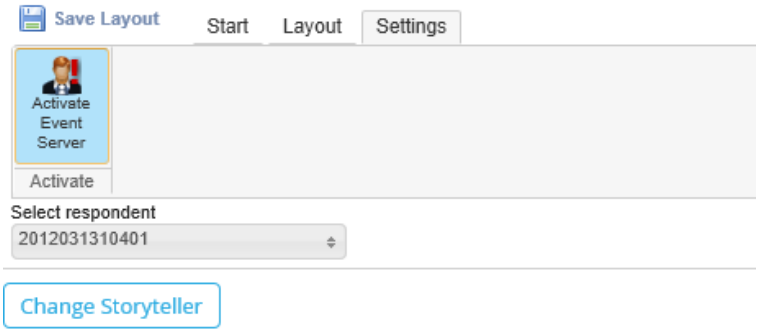



### 8.2.2 ACTIVATE EVENTS FROM FORM REPORT

As the Event conditions are triggered, the Report User updates the respondent data in a Form report. A new setting is available in the Form setup so an updated Form injects an Event search automatically.

The Event email send outs are made instantly when a Form is updated.

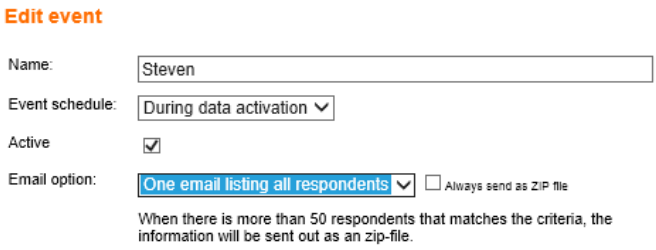
In the Form setup a new tab is added named “Settings”. A button named “Activate Event server” is added with an option “Activate Event server when Form is saved”.




## 8.3 Event Server Features

### 8.3.1 OPTION FOR AN E-MAIL PER RESPONDENT

A new email setting option is added to Event Server. On the creating/editing the Event page in the Email option box, there are two options to choose from. The default option is “One email listing all respondents” and the second option is “One email per respondent”.



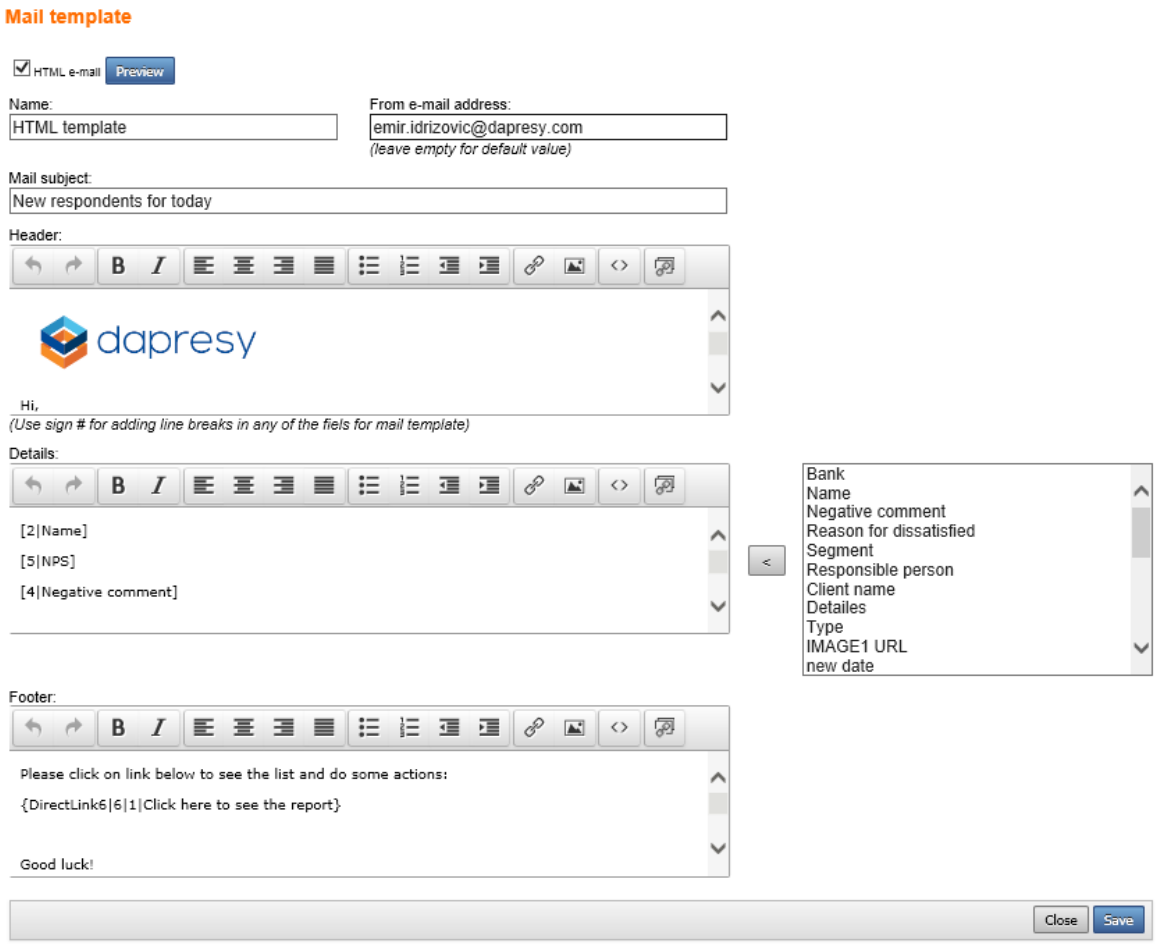

*In the earlier Event server setup options, all the respondents fulfilling a defined Event condition were included in one email. However option for one email per respondent makes it easier to schedule tasks in Outlook.*

## 8.3.2 OPTIONAL HTML E-MAILS IN EVENT SERVER

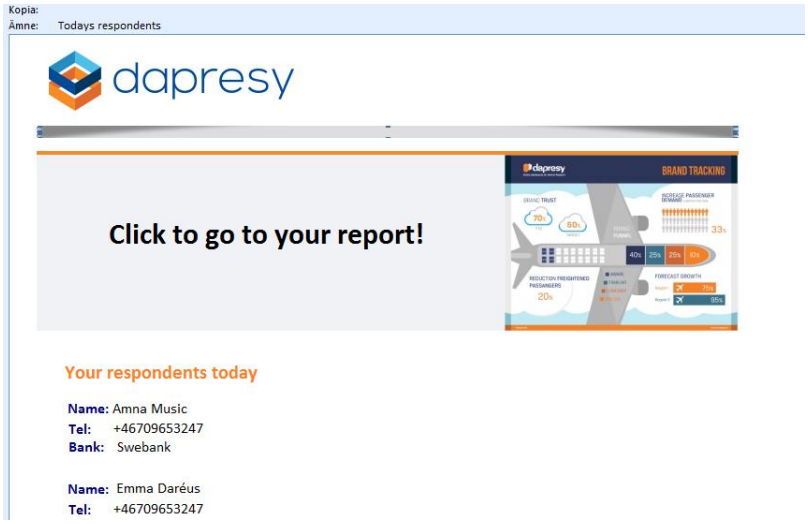
There is an option for HTML formatting of emails in Event server and HTML support for styling, such as adding images or logos, to have a customized look and feel of email messages. Email can connect to reports.

The following options are available on the email setup page:

- Options to choose plain text or HTML.
- Plain text doesn't have direct link button as you need to send email as HTML to have link included.
- Possibility to Preview email, prior to sending it.
- Linking images to StoryTeller reports. If user adds an image to HTML editor then it's possible to link this image to selected StoryTeller report and slide. To link the image to report and slide it's necessary to use 'Insert direct link' to link to the report.




After applying HTML styling the email template can look as shown here:

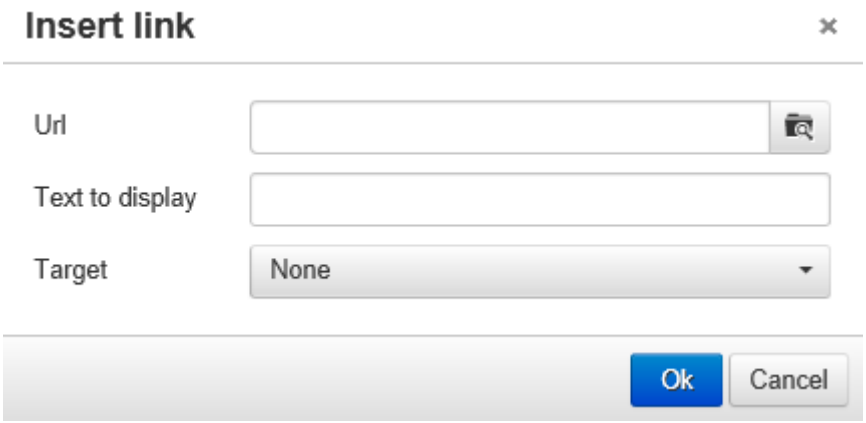



Still the option for sending the emails in plain text exists, as all organisations don't have support to show HTML emails correctly.

### 8.3.3 IMPROVEMENTS IN DIRECT LINK FEATURE

Following improvements are made in using 'insert direct link' feature:

1. The design for inserting link is changed and now looks like the box show here.

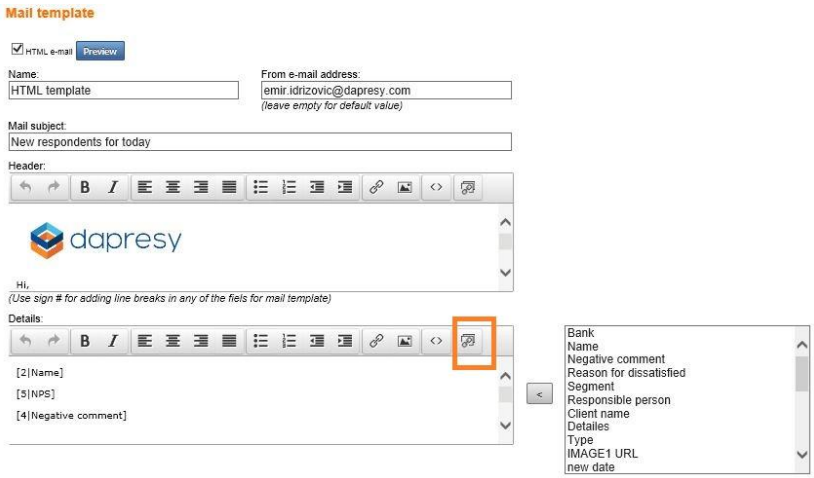



2. If 'Show URL' is selected then 'Text to display' and text field are disabled. Email will include URL, just as in earlier version.
3. When 'Show URL' is not selected then it's possible for user to write text that is shown instead of URL in the email. When mail is send out then text written in the text field will be shown and when user clicks on it will open up report.

## 8.3.4 DIRECT LINKS IN EVENT E-MAILS

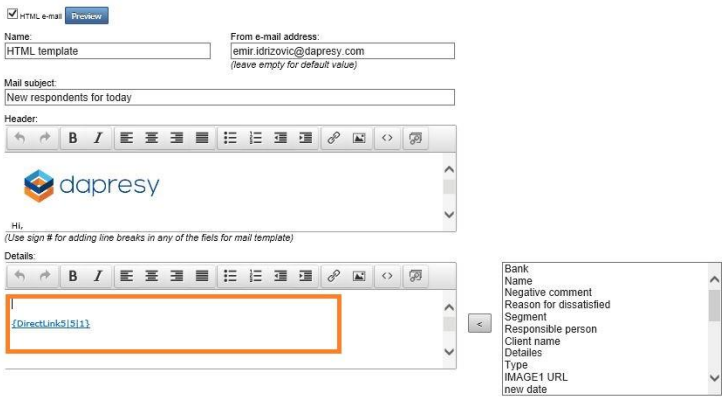
Hyper-links can be embedded in Event emails which allow users to click and automatically be logged into a specific Report. The direct link contains the user credentials of the Report User receiving the email. The Administrator can also add the direct links to the email template. It's possible to add a direct link to any Report type including Sub reports and the Start page. If the target report is a StoryTeller it is possible to link to a specific slide within the report. The images below show the setup:

*To insert a direct link the Administrator clicks the button shown below.*

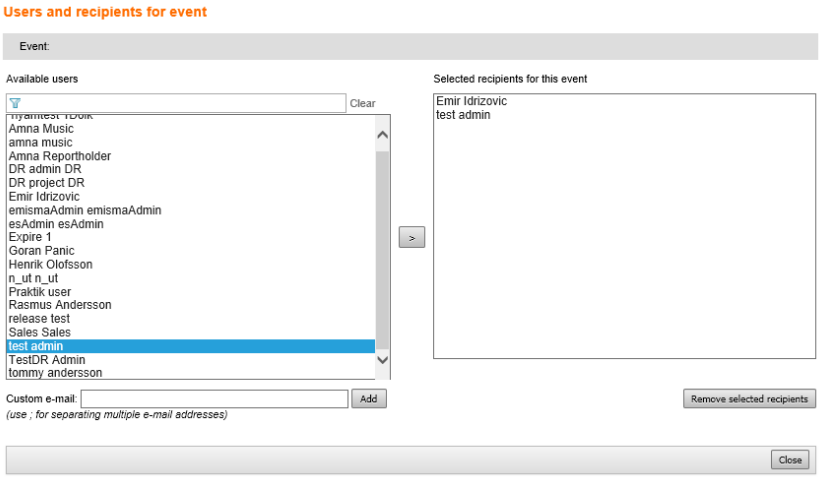



*A popup window appears where the target report (and slide) is selected.*


*When "Insert" is clicked in the image above the direct link is inserted in the position of the text cursor. It can be in the Header, Details or the Footer box.*

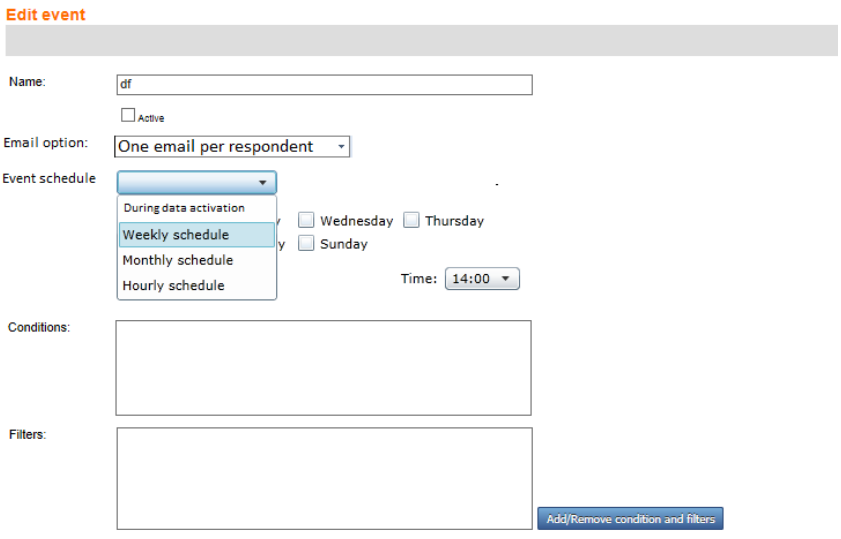


It is possible to add recipients to the Event that do not exist as Report Users in the project. An external email address can be added as shown in the image below. No direct link can or should be inserted in emails sent out to these people.

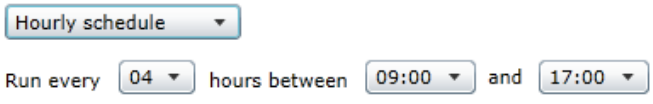



## 8.3.5 SCHEDULE EVENT SEND OUTS

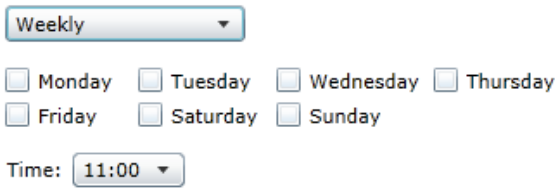
A new control has been added to the Event setup page for defining how often the system should search for respondents fulfilling the conditions. As shown in the image below an option “During data activation” is present by default.



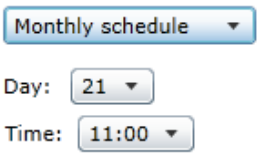

*The image below shows the hourly settings. The Administrator selects to for example only make send outs every one hour between 09:00 and 17:00.*



*The image below shows the weekly settings. The Administrator selects to for example only make send outs Monday to Friday.*



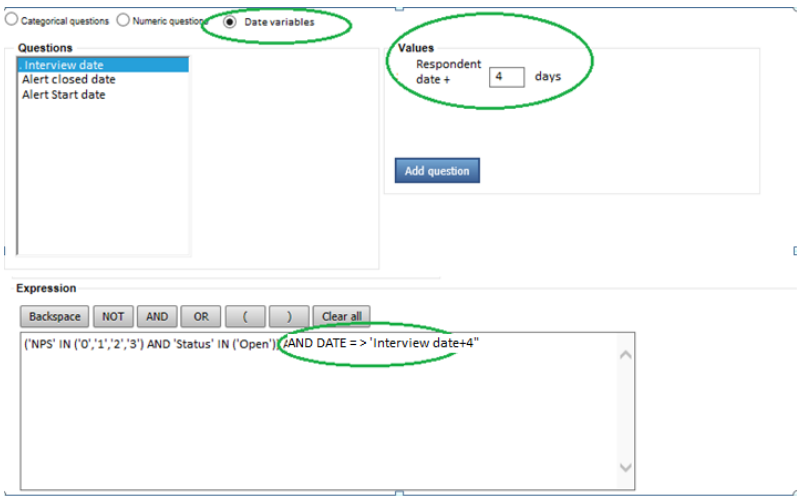

*The image below shows the Monthly settings. The Administrator selects to for example make the send the 21st every month.*




## 8.3.6 USE DATES TO CREATE CONDITIONS AS REMINDERS FOR NON-CLOSED EVENTS

There is a new option for creating reminders of non-closed Events based on number of days the Event has been open. For example, an Event email is sent to a responsible person if any respondent has a NPS score lower than 4. If the Event has not been closed or updated within 4 days from the interview date a reminder is sent out. The reminder Event is created with same conditions as the first Event plus an additional condition based on for example the Event status and the number of days passed since the interview date.

The date variable is added to the page used for creating the Event Conditions as shown in the image below. When the user selects the new option “Date variables”, the variable list shows all Date variables. The Administrator than selects the one to use in the condition and defines the number of passed days that should trigger the event.




*The image shows new controls for using the Date variables. In this example the Event is triggered if the “NPS” value is 0-3, the “Status” is Open and the date is Date is “interview date +4 days” or bigger.*

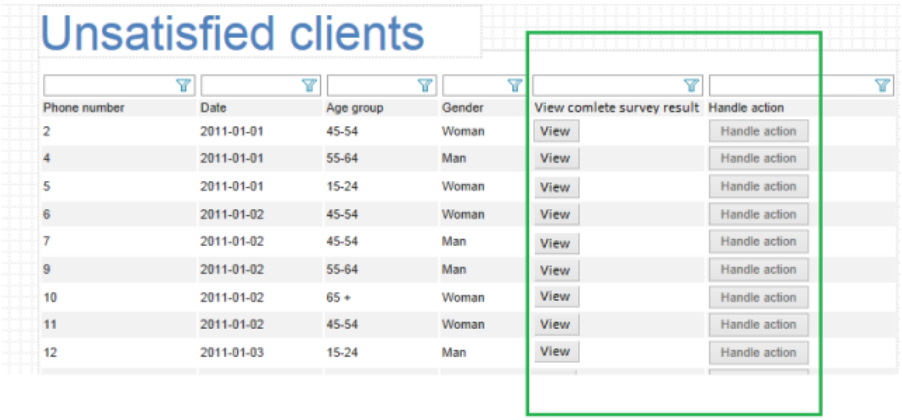
## 8.4 IMPROVMENTS IN STORYTELLER REPORT

### 8.4.1 RESPONDENT DATA TABLE IMPROVEMENTS

The new linking feature in the Respondent Data table is improved. It now supports multiple columns of links (links to different Form reports) as shown in the first image below.

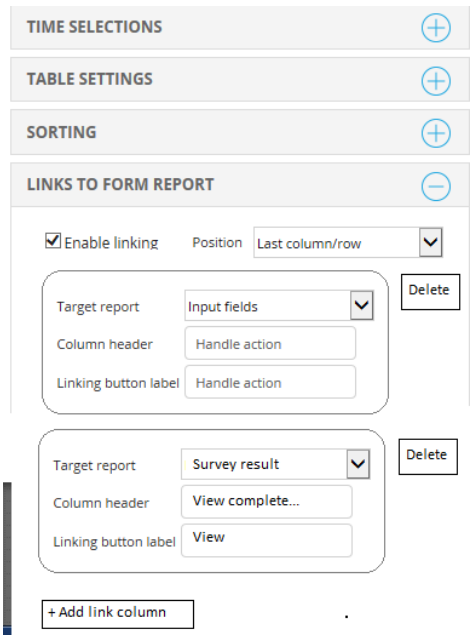
The second image shows a setup of options for links to form report. As shown the Administrator can add/delete multiple link columns by clicking Add/delete.

The “position” selection (first/last) can be a general selection for all defined columns as shown in the image.




### 8.4.2 SCANNING FREQUENCY OF NEW RESPONDENTS FULFILLING THE CONDITIONS

Report Users can now update the data in the project. In the Form report, the Event conditions can be fulfilled at any time and not only when new data is activated. This new feature increases the need of being able to schedule Events and also to create an Event search when respondent data has been updated in a Form report. In the existing version of the Event Server, the Events emails are sent out automatically when new data is activated in the project.



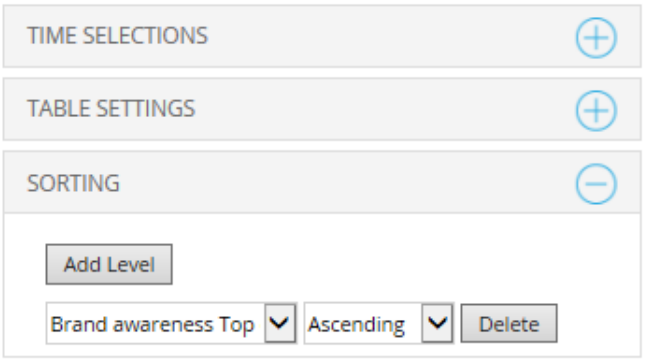
## 8.4.3 DEFINE DEFAULT SORT ORDER

A new setting makes it possible to define the default sort order of the respondents in the Respondent Data table. In the previous version the default view was sorted by the interview date (ascending) but now it can be set to any default value which makes it possible to create a default view more adapted to the customer needs.

## 8.4.4 SETUP

The new sort order controls are shown in the setup window in the Settings tab as shown in the image below. The sorting can be defined in multiple levels. To define the sorting select the variable to base the sorting by and the behavior (ascending or descending).

*The image below shows the new sort order controls placed in the Settings tab.*



# 9. SIGNIFICANCE TEST UPDATES

## 9.1 NOMENCLATURE UPDATES

When performing a significance test in a StoryTeller chart or a table, it is possible to select if the test should compare results “Within groups” or “Between groups”. For better usability these names have been updated.

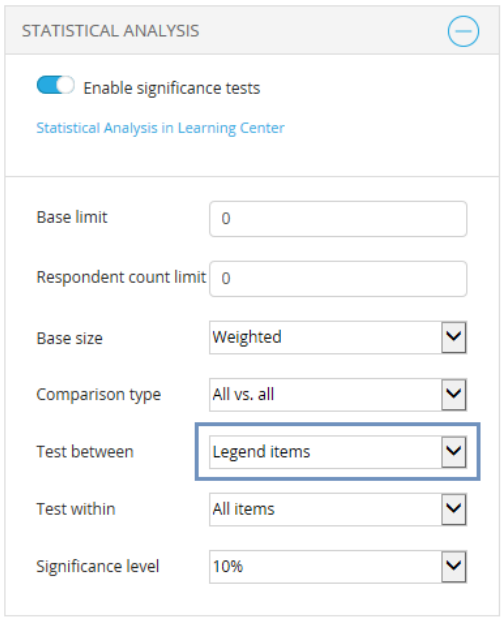
**Chart objects**

- “Within groups” has been changed to “Test between legend items”
- “Between groups” has been changed to “Test between axis groups”

**Table objects**

- “Within groups” has been changed to “Test between columns”
- “Between groups” has been changed to “Test between rows”

*The image below shows the update in the chart setup window.*



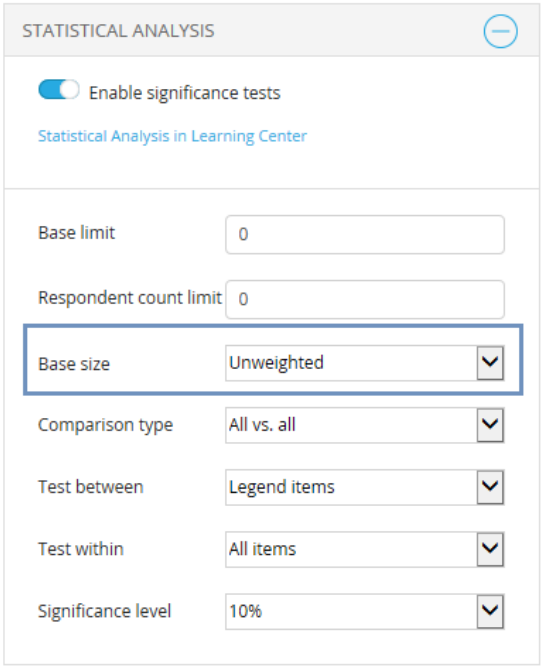

## 9.2 SELECT BASE SIZE TO USE IN CALCULATION (WEIGHTED/UNWEIGHTED)

New support has been added for selecting which base size to use in the significance test calculation made on a weighted result. In the previous version, the base size used in the significance test calculation was weighted if the result was weighted. It is now possible to use an un-weighted base size even when the result is weighted.

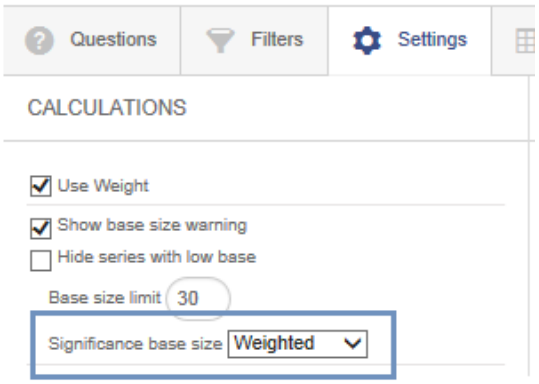
### 9.2.1 SETUP

The new logic is supported in StoryTeller charts, tables and in the Cross tables. The controls are only enabled when the chart/table shows a weighted result. If the chart/table shows an un-weighted result the base size used in the significant test calculation is always based on the un-weighted numbers.

*The image below shows the new control for selecting base size in StoryTeller charts and tables.*




*The image below shows the new control for selecting base size in Cross tables*




**Note:** When applying an un-weighted base size to significance test made on weighted result, it only effects the base size and not the mean value/ percentage values used in the in the calculation as shown in the example below.

Example:

-The weighted percentage value is 40%
-The un-weighted percentage value is 50%

-The weighted count is 1000
-The un-weighted count is 200

If a chart shows the weighted result and the Administrator defines to perform significance test using an un-weighted base size the following numbers are used the calculation.

%= 40
Count=200

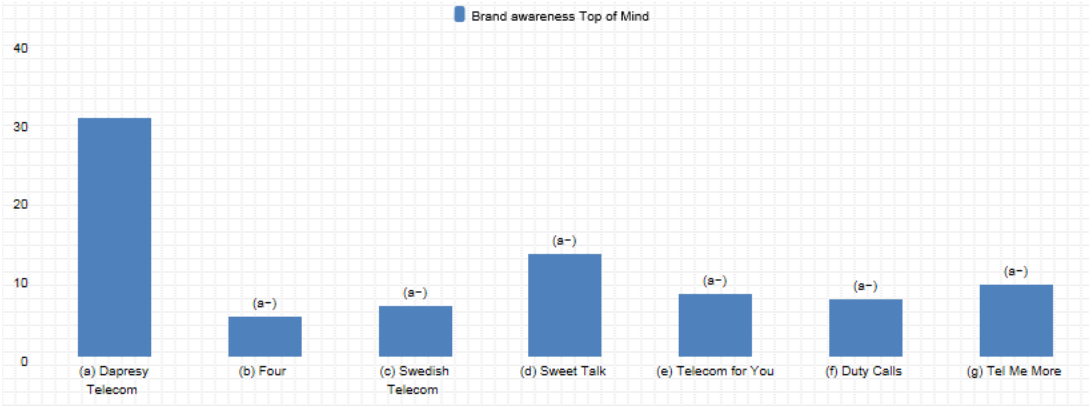
Except from the base size used in the calculation the selection does also effect the "Base limit" and "Respondent count limit". If un-weighted base size is selected those features will use the un-weighted base number.

## 9.3 NEW LOGIC FOR RUNNING SIGNIFICANT TEST AGAINST FIRST/LAST DATA POINT

When performing significance tests in StoryTeller charts and tables, it is possible to define which data point the test should be run against. New options for running the test against the Last/First data point have been added to make the logic more complete. The lists below show all present options:

1. All vs All
2. Previous data point
3. Next data point
4. First data point (new option)
5. Last data point (new option)

*The example chart below the brands are tested against the first brand Dapresy Telecom, this logic was not possible to perform in the previous version.*

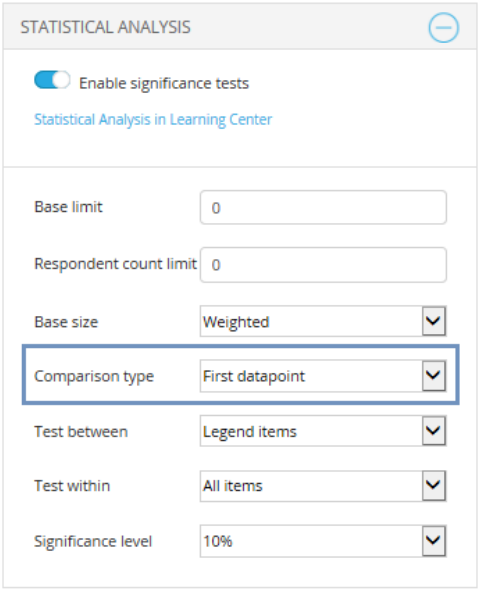



### 9.3.1 SETUP

The two new options have been added to the existing Comparison Type selection list.

*The image below shows one of the new options I the chart setup.*

## 9.4 RUN SIG TEST ON MEAN OF MEANS FUNCTION




## 9.5 IMPROVED COMPARISON LOGIC IN NESTED TABLES

The significance test comparison logic has been updated to support a more flexible behavior in nested tables and charts. It is now possible to select if the nesting should be considered or not. The example below explains the previous logic and the new possibilities.

The example table below has nested columns with Gender nested by Age groups. When performing a significance test over columns and, for example, using the option “All vs All”, all the columns are compared to each other. As this is not the desired behavior, the new nesting option makes it possible to select if the nesting should be considered in the comparison logic. In this example, the user can select to perform the test:

1) between all the columns (the previous logic)
2) between the Gender columns
3) between the Age groups columns in this example.

*The image below shows the previous logic, all columns are compared to each other.*

| | 15-24 | | 25-34 | | 35-44 | |
|---|---|---|---|---|---|---|
| | (a) Man | (b) Woman | (c) Man | (d) Woman | (e) Man | (f) Woman |
| Dapresy Telecom | 22.2% (c-,e-) | 36.1% (d+) | 44.0% (a+,d+,f+) | 19.1% (b-,c-,e-) | 46.6% (a+,d+,f+) | 25.7% (c-,e-) |
| Four | 3.4% | 5.8% | 2.7% | 7.8% | 4.6% | 7.1% |
| Swedish Telecom | 13.9% (c+,d+) | 8.3% (c+,d+) | 1.2% (a-,b-,f-) | 1.0% (a-,b-,f-) | 5.9% | 8.8% (c+,d+) |

*The image below shows the same table but the nesting has been considered. The Gender columns are compared to each other only.*

| | 15-24 | | 25-34 | | 35-44 | |
|---|---|---|---|---|---|---|
| | (a) Man | (b) Woman | (c) Man | (d) Woman | (e) Man | (f) Woman |
| Dapresy Telecom | 22.2% | 36.1% | 44.0% (d+) | 19.1% (c-) | 46.6% (f+) | 25.7% (e-) |
| Four | 3.4% | 5.8% | 2.7% | 7.8% | 4.6% | 7.1% |
| Swedish Telecom | 13.9% | 8.3% | 1.2% | 1.0% | 5.9% | 8.8% |

*The image below shows the same table but the nesting has been considered. The Age groups columns are compared to each other only.*

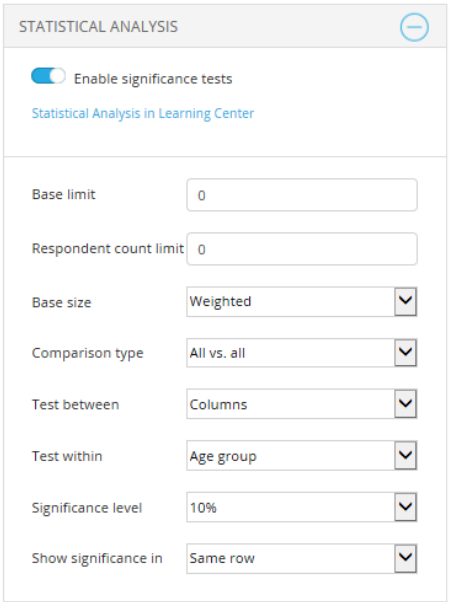
| | 15-24 | | 25-34 | | 35-44 | |
|---|---|---|---|---|---|---|
| | (a) Man | (d) Woman | (b) Man | (e) Woman | (c) Man | (f) Woman |
| Dapresy Telecom | 22.2% (b-,c-) | 36.1% (e+) | 44.0% (a+) | 19.1% (d-) | 46.6% (a+) | 25.7% |
| Four | 3.4% | 5.8% | 2.7% | 7.8% | 4.6% | 7.1% |
| Swedish Telecom | 13.9% (b+) | 8.3% (e+) | 1.2% (a-) | 1.0% (d-,f-) | 5.9% | 8.8% (e+) |

## 43.1 SETUP

A new selection list has been added to the significance test setup to define if the nesting should be considered or not. As default, no nesting considered.

The new selection list contains all the possible options based on the setup. If the significance test is made over columns, the selection list contains all items placed in columns. If the significance test is made over rows, the selection list contains all items placed in rows. The same logic is valid for charts.

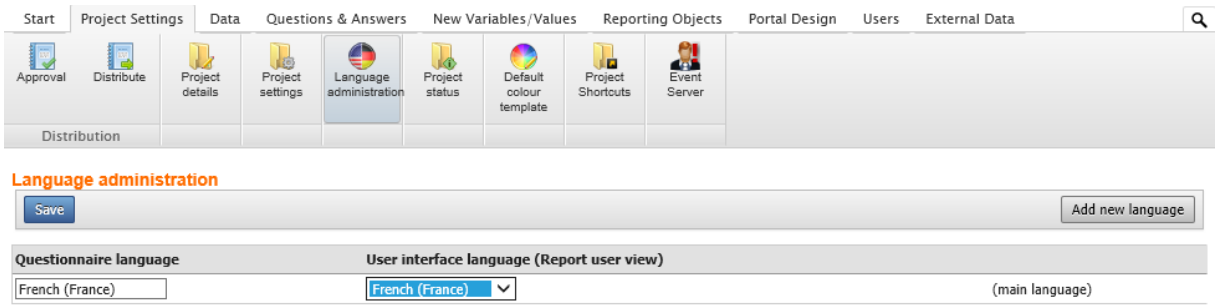
*The image below shows the new setting for defining if nesting should be considered or not.*



# 10. OTHER IMPROVMENTS

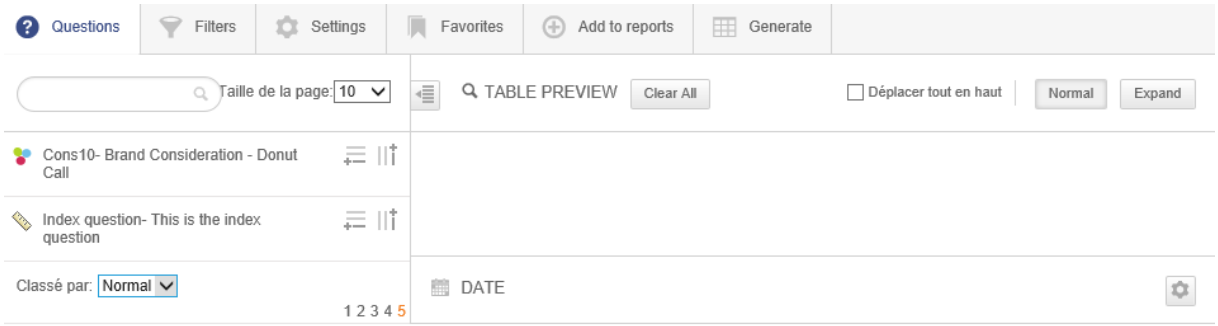
## 10.1 FRENCH TRANSLATION (CULTURE) ADDED

There is an option now to chose French as a User Interface Language. The applied language (translatlated user interface) is visible in Report User View only.




## 10.2 INDEX QUESTIONS IN TABLETOOL

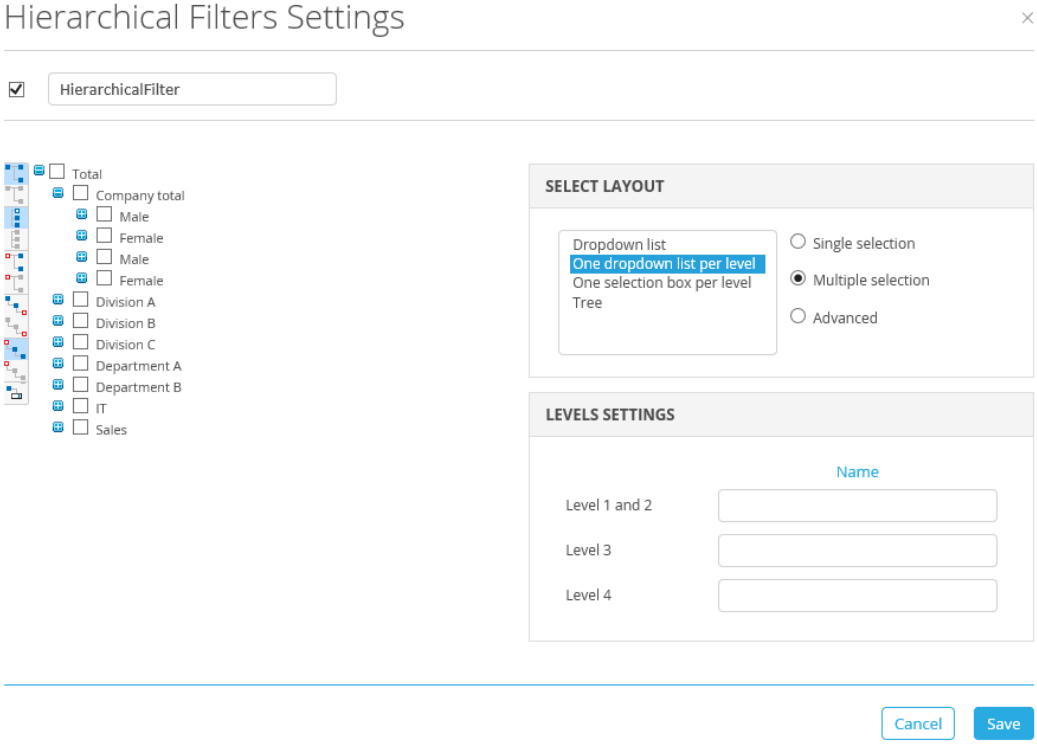
Index questions can now be shown in Table Tool. Previously, it was possible to show data for index questions in Tables and charts in StoryTeller, but it was not for Table Tool. It is also possible to add Index questions to rows and to columns and also to nest.




## 10.3 CHANGES IN H-FILTER SETTINGS IN STORYTELLER

On the H-Filters Settings page, there is selection button to the right of the tree. The new functionality for the selection buttons is that you can now create rules. The buttons are connected to the rules as shown in the image bellow.

As the button is selected on a node, the background for that selected button changes color. If admin user selects to always show all child nodes in one StoryTeller for selected group then all new child nodes added to the project will be selected by default in this StoryTeller.




A new setting is added to 'show all nodes' for Hfilter in optional filters in StoryTeller. When this option is selected, all nodes will be selected, even new nodes added after setup.

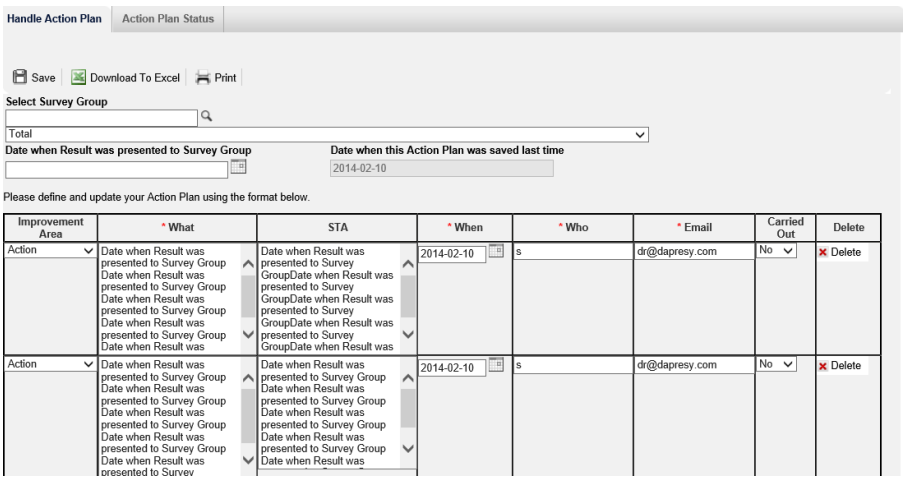
In the report user Excel template the option for 'Access to all units' is added to 'Access rights' column

### 10.3.1 CHANGES FOR REPORT USERS

When as admin creates a user, they can select to what that user should have access to 'Present group and its child groups'. But if the admin adds a new node, these won't be included. If this option is selected for the report user, then all new nodes belonging to selected option will be added to report user.

## 10.4 DYNAMIC HEIGHT OF TEXT BOXES IN ACTION AND PLANNING

In Action and planning, the text boxes are now dynamic. You can now enter text with available scroll bar, while earlier there was no scroll bar and text was difficult to input and read.



## 10.5 EXCLUDE SERIES FROM OPTIONAL FILTERS

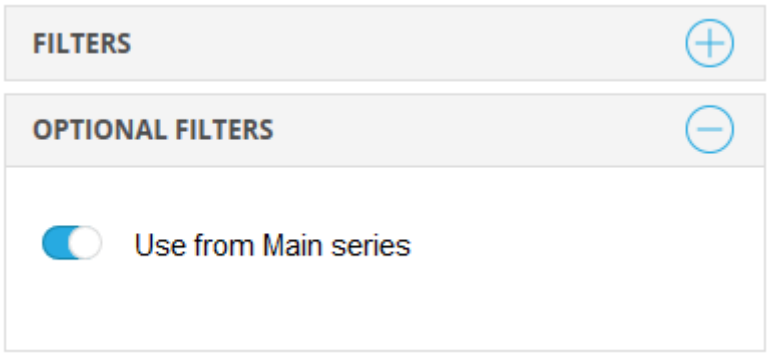
The current version of the StoryTeller allows excluding the Optional Filters from objects but not for a series in the object. It is now possible to exclude only one series from optional filters. The administrator has the ability to exclude a series in charts/tables from the Optional Filters during the setup of an object. As long as a sub series does not have settings to exclude Optional filters enabled, then the settings done in the main series will determinate if object should be included or excluded from Optional filters.

The options should be added to:

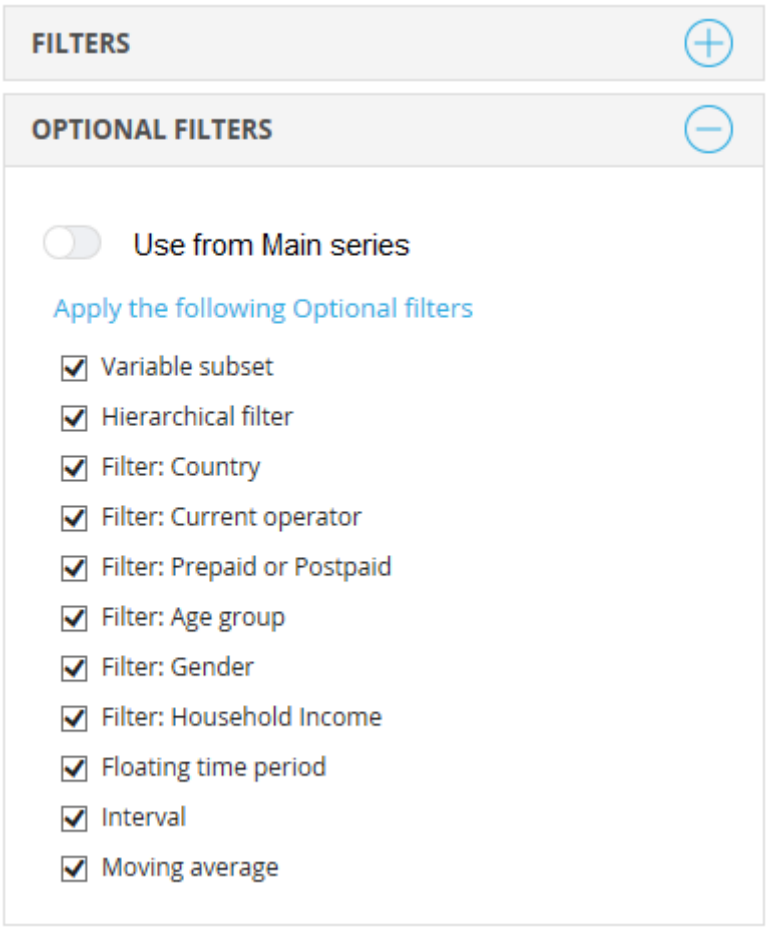
1) Chart Object
2) Tables

The defined settings should be included when copying an object/report, and when making “Import slides”.
The new controls should be placed in the Filter tab in a new Optional Filter settings page as shown in the image below.

As default, all subseries will use settings from the Main series. You can now change settings per series. In the Filter tab, the user will see that ‘Optional filters’ settings are used from Main series. See image below:




Un-check ‘Use from Main series’ to deselect Optional filters. This will not affect the subseries user is changing settings for.




***Note:*** *Please make sure that while generating charts/tables correct data is generated.*

## 10.6 USE OF MULTIPLE DATE VARIABLES IN REPORTING

We now support use of multiple Date variables in reporting. This option is similar to the process related to "Weight" variable, where the Administrator can select which Numeric variables is to be used as Weight variables. For multiple Date variables, the Administrator can define which Date variables should be included for use in the reporting.

> *In the existing version of Dapresy Pro each respondent has one Interview date variable only. This interview date variable is the base in all calculations for filtering out the correct respondents and to compute week numbers, months etc.*

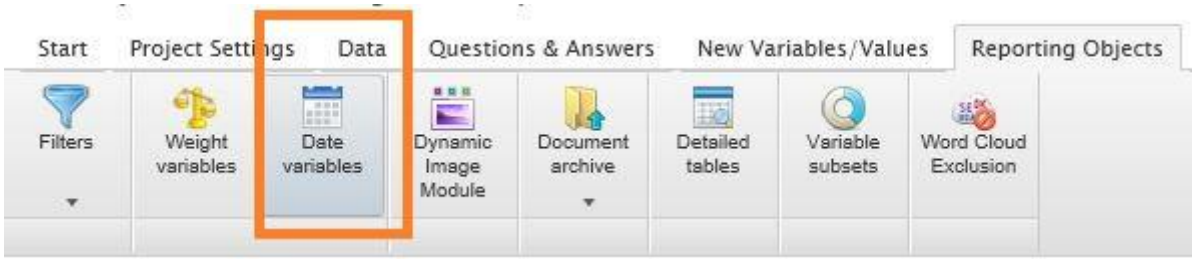
This means that a project can contain multiple Date variables and not only one. The new ability to support more than one Date variables is supported in the Cross-table tool and the StoryTeller objects.

## 10.7 SETUP OF NEW DATE VARIABLE

The setup consists of two steps:

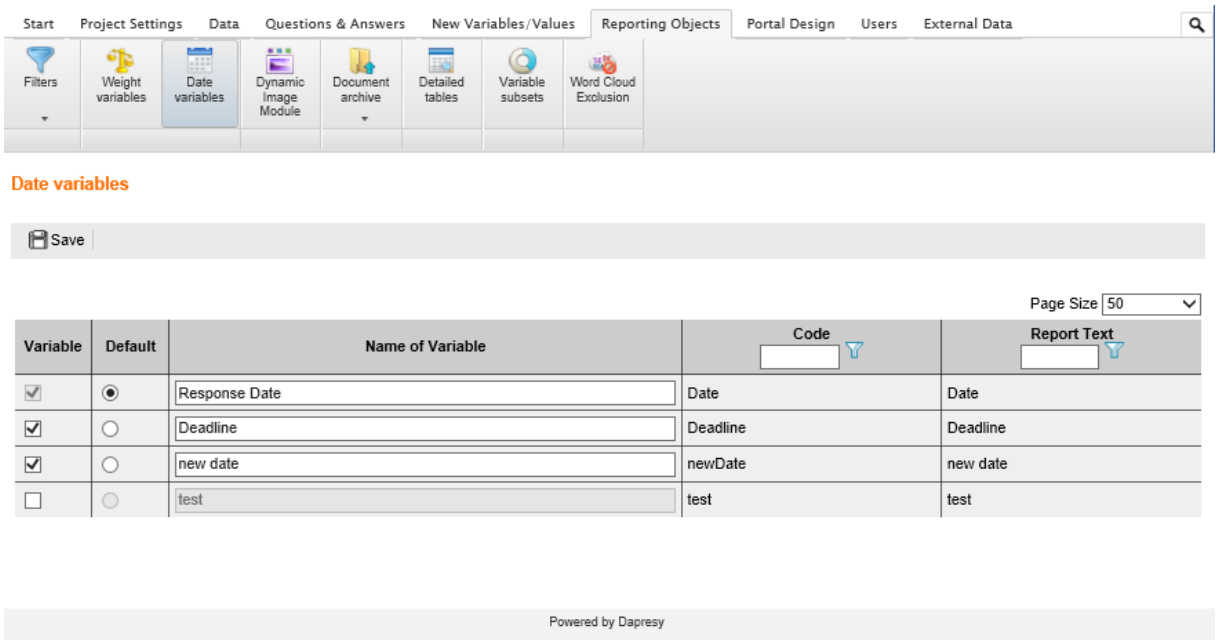
- Step 1: the Administrator defines which variables should be possible to use as Date variables in the reporting.
- Step 2: During the setup of each StoryTeller object and the Cross table tool the Administrator defines which Date variable to use

A new page for selecting the Date variables is created and new icon “Date variables” placed in the Reporting Object tab as shown below.



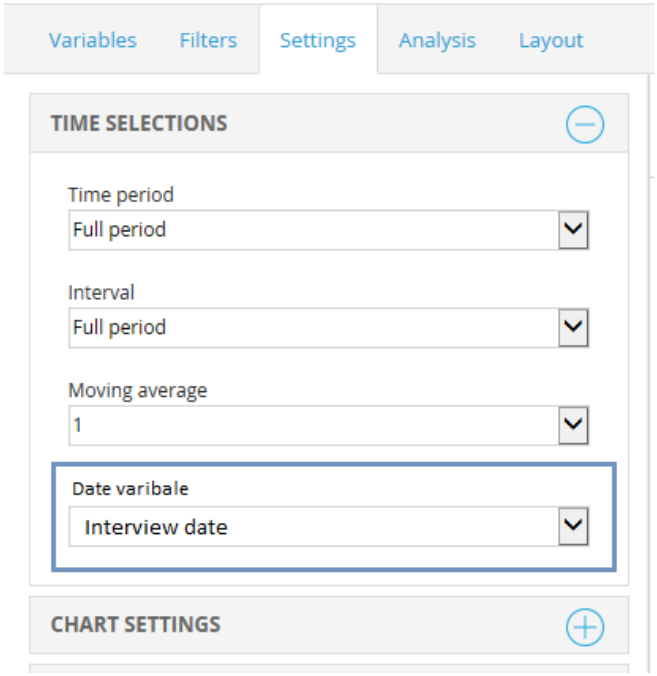

The image below shows selection of Date variables.

- The page lists all Date variables
- The user selects which one to use in the reporting as Date variables
- A default Date variable is selected
- Each Variable can get a new Name which is shown during the reporting setup



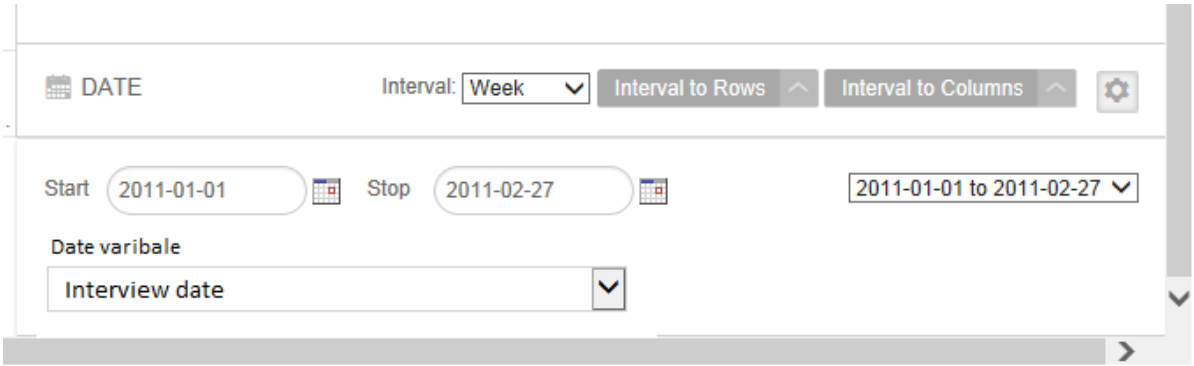
## 10.7.1 STORYTELLER objects

In all StoryTeller objects, the new Date variable selection is placed in the Settings tab in the Time selection panel as shown in the image below. The new control appears if more than one variable can be used as Date variable.

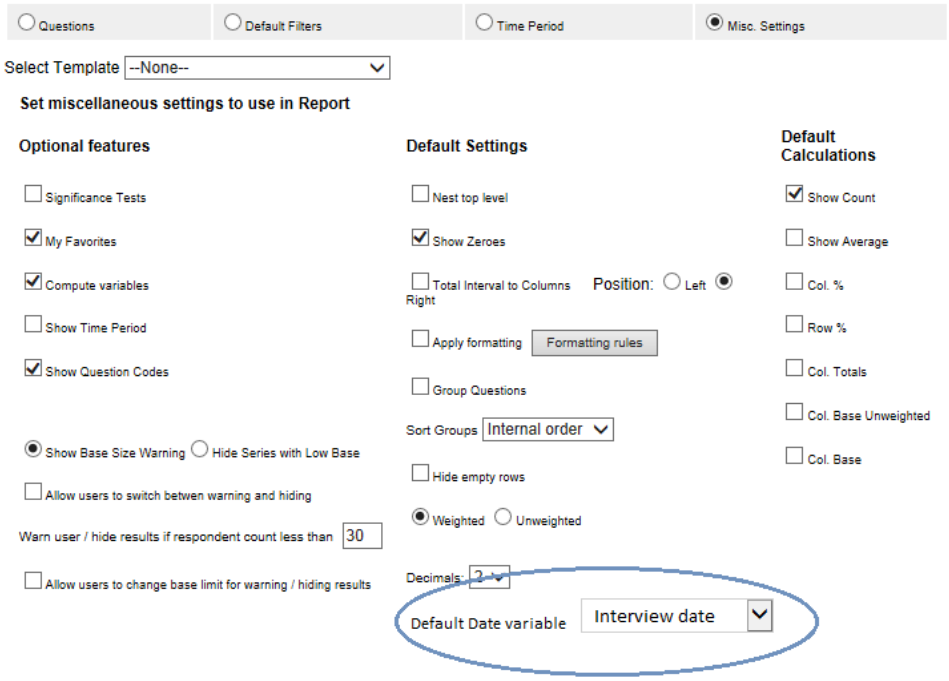



## 10.7.2 Cross table tool

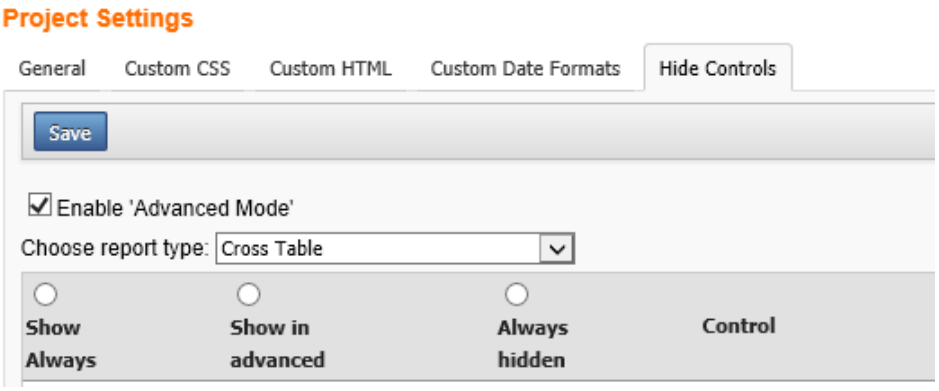
In the Cross table tool, the new Date variable selection is added to the Settings tab in the Date panel as shown in the image below. The new control appears if more than one variable can be used as Date variable.



The default Date variable can be changed in the Cross Table tool setup page and the Cross table tool can be distributed to Report Users. This selection overrides the default value defined in the new Administration page for selecting the Date variables in the project.




The feature for hiding controls in the Cross table is updated to support the option to hide this new control. The image below shows the page for the controls shown for the Report users.




If objects are using Input variable as Date variable, than it's not possible to use pre-generate functions for these objects.