DAPRESY PRO 8

TECHNICAL RELEASE NOTES VERSION 3

December 2012

Index

1 INTRODUCTION

This document describes new and improved features in Dapresy Pro version 8.

- Chapter 2 describes new/improved features in Storyteller reporting
- Chapter 3 describes new/improved features in Storyteller report setup
- Chapter 4 describes new/improved features in the general administration

A staging version of Dapresy Pro 8 was released in June 2012, since then more new functions have been added which now are available in the official version 8. Chapters marked with an * in the document are new functions that were not present in the staging version.

Chapters marked with an ** were included in the November 2012 patch and chapters marked with an * were included in the December 2012 patch.**

An important change that affects all users is the new password logic and authentication controls, it has been upgraded to improve security. Please read more about that in chapter 4.2.2.

Another important change is the "login time-out". If you are inactive for 20 minutes you will automatically be logged out from the system. The time has been shortened for security reasons.

If you do not have access to the screens/features mentioned in this document or if you want to know more about these features please contact Dapresy Global Support at: support@dapresy.com and they will be able to assist you.

Best Regards,

Dapresy Team 2012

Email: support@dapresy.com

Telephone: + 46 (0)76 019 89 42

2 NEW/IMPROVED REPORTING OPTIONS IN STORYTELLER

Chapter 2 describes new and improved reporting objects in Storyteller. The following features are included:

- Charts improvements
  - New chart type; Positive/negative shares
  - New chart type; Scatter/bubble chart
  - New chart type; Vertical area chart
  - New chart type; Polar charts
  - Improved chart settings for more flexible layout
  - Significance testing in Storyteller charts
  - Show base size in charts
  - Base size warnings/hide results with low bas
  - Prefix/suffix to Y-Axis in charts

- Table improvements
  - Support for significance testing in cross tables
  - Support for hiding results with low base
  - Support for warning when the base is too low

- New modules
  - New table module
  - Dynamic Image module
  - Respondent tables - open answer reporting
  - Word cloud module

- Optional Settings/filters
  - Optional chart settings (drilldown into charts)
  - Support for Multiple optional filter
  - New multi selection options for Hierarchical filters

- Calculation
  - Multiple weighting

IMPORTANT NAME UPDATE

As shown in the list above a new table module has been added to Storyteller. The new table module uses the exact same logic as the Chart setup in Storyteller. It's easier to learn for first time users and it also supports better nesting and layout possibilities which are required when adding tables to a dashboard/report. Due to this new module the previous table object named "Tables" has been renamed to "Cross Tables" as the regular Cross Table Tool is used. The new table module is named "Tables". Please read more about the new table module in chapter 2.14.

2.1 POSITIVE/NEGATIVE SHARES CHARTS

A new calculation option has been added which makes it possible to display positive and negative shares (%) in all chart types except Pie and Donut. This feature is very useful for all types of surveys but especially in stakeholder projects.

The images below show some examples of Positive/Negative charts.

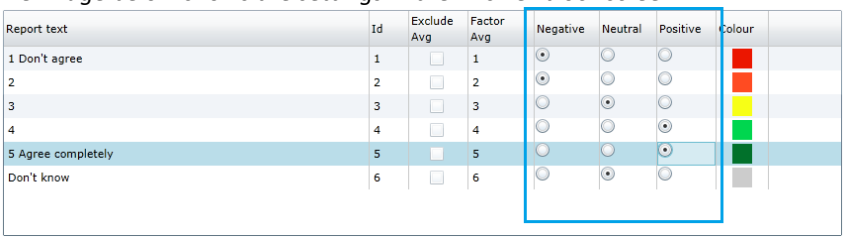
2.1.1 SETUP PROCESS

The setup is done in Storyteller but a preparation step is done in the Answer Block screen, the answers must be defined as negative or positive.

ANSWER BLOCK SCREEN

Before creating the chart - the answer alternatives of the used questions must be defined as Positive or Negative. This setting is done on an answer block level in the screen “Answer block”, see the image further down. All answers defined as negative will get a negative value in the chart and the positive answers a positive value. As shown in the image below some answer alternatives can be defined as Neutral, those answers will never be shown in the charts when the Positive/Negative calculation is active.

The image below shows the settings in the Answer block screen.

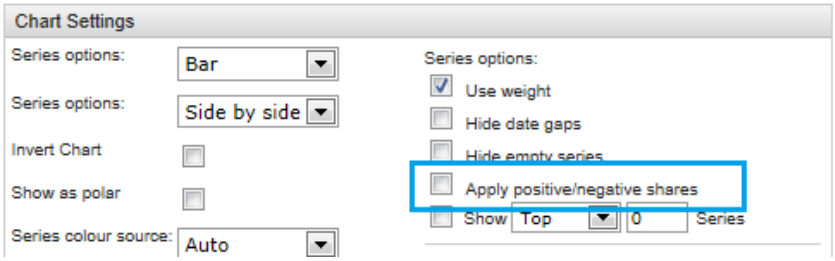


Note: When creating Grouped answers with the negative/positive settings present (creating for instance a Top box and a Bottom box) one must be defined as positive and one as negative.

CHART SETUP

To activate the Positive/Negative calculation in the chart setup, check the box “Apply positive/negative shares” in the Settings Tab.

The image shows the Positive/Negative setting in the Settings Tab.



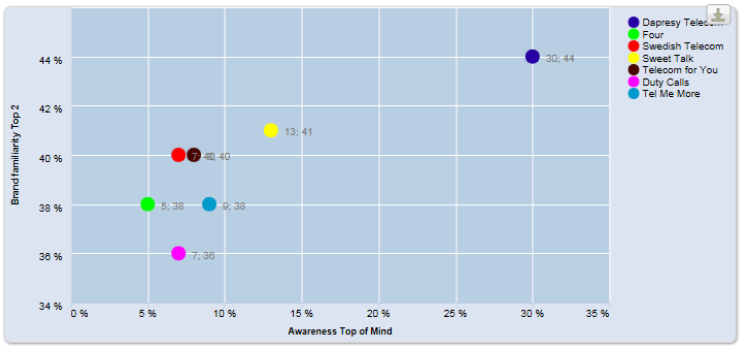
Note; when showing the results in bars or in columns the series option “Stacked” should usually be selected to get the desired chart layout.

2.2 SCATTER/BUBBLE CHARTS

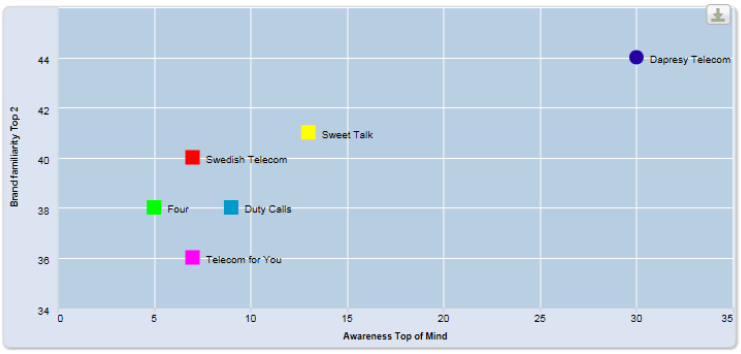
Scatter (2 dimensions) and Bubble charts (3 dimensions) are now available in Storyteller which makes it possible to show even more data in single charts. The dynamic setup procedure makes it possible to cross variables of any type (mean, numeric and categorical.)

Below some example charts are shown;

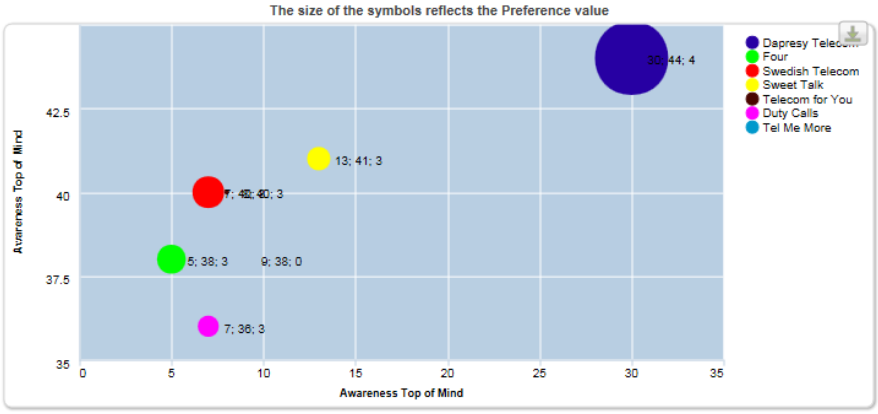
Example 1: A top 2 box (multiple questions) crossed with Awareness (single question and multiple answer alternatives) in a Scatter chart. The data point explanations are shown in the legend and circles used as symbols.



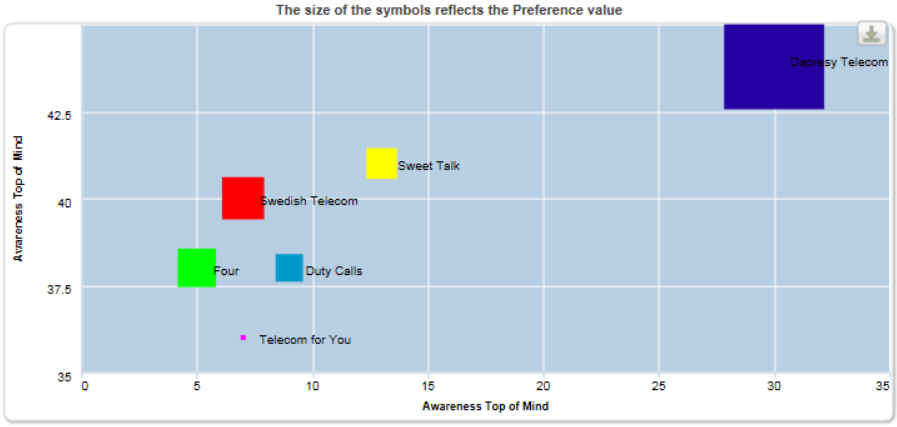
Example 2: A top 2 box (multiple questions) crossed with Awareness (single question and multiple answer alternatives) in a Scatter chart. The data point explanations are shown in the chart area. Square symbols are used for all brands except one.



Example 3: A top 2 box crossed with Awareness and a Preference value in a Bubble chart. The explanation text is shown in the legend and circles used as symbols.



Example 4: A top 2 box crossed with Awareness and a Preference value in a Bubble chart. The explanation text is shown in the chart area and squares are used as symbols.



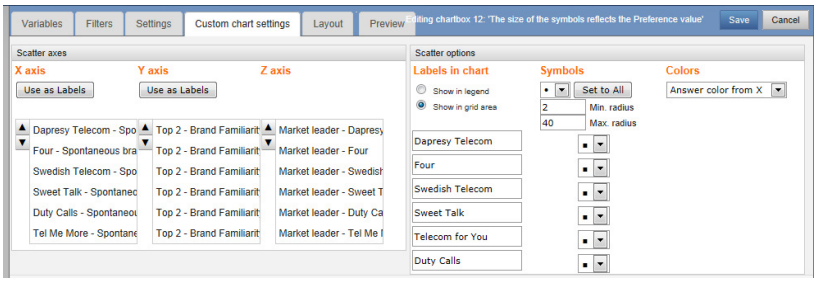
2.2.1 SETUP PROCESS

As shown in the example images above, variables of different types can be crossed with each other, for instance mean value variables can be crossed with categorical variables.

A scatter requires 2 data series in the chart, one for X and one for Y axis. The “Main series” in the chart acts as X axis and the “Sub series 1” acts as Y axis. A Bubble chart requires a third series as well for the Z value.

When selecting Scatter or Bubble in the chart setup a new Tab will be shown in the setup interface named “Custom chart settings”, see the image below. In this chart the mapping between variables is done as each variable in the X- axis must be mapped to a variable on the Y axis (and Z in the Bubble chart.). The Custom chart settings are described further down.

The image shows the Custom chart settings Tab.

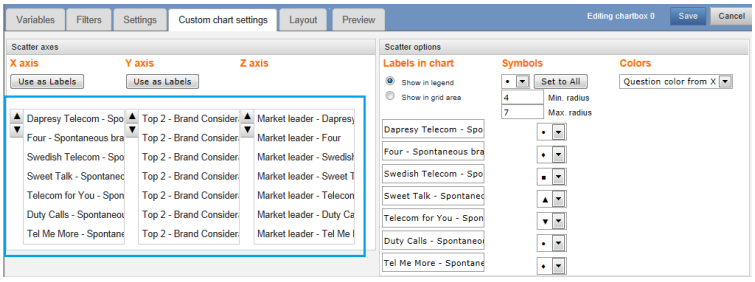


The following steps are performed in the Custom chart setting Tab;

1. Map variables
2. Define labels
3. Define Symbols
4. Define Colors

MAP VARIABLES

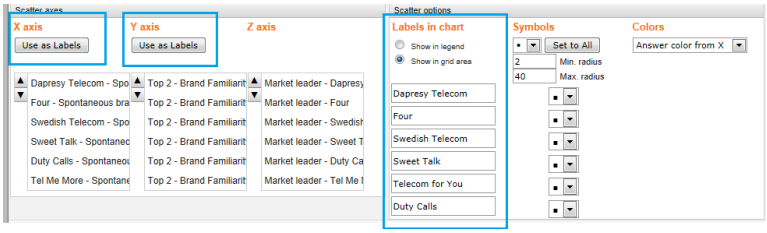
Image below highlights the mapping area.



Labels

The labels shown in the Scatter/Bubble are picked from the X axis variables as a default. The labels can be picked from Y and Z axis as well by clicking the “Use as labels” button (highlighted in image below). The labels can be freely defined as well, just enter the desired text in the “Labels in chart” column.

The image below highlights the label setup.

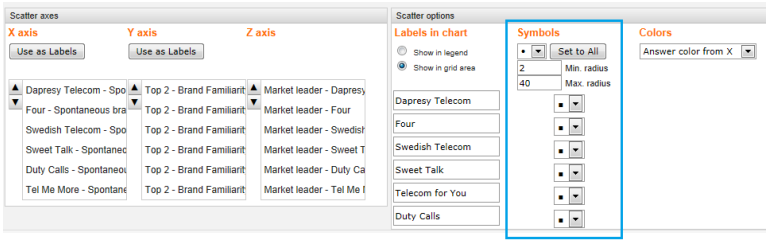


As shown in the example charts below, the explanation text of each data point can be shown in the legend or within the chart area. Though, no smart labeling exists so if the texts are placed within the chart area it might be hard to read the text if the data points are too close to each other.

Symbols

Symbols can be defined per data point, either select per data point or use the “Set to all” option to change all with one click.

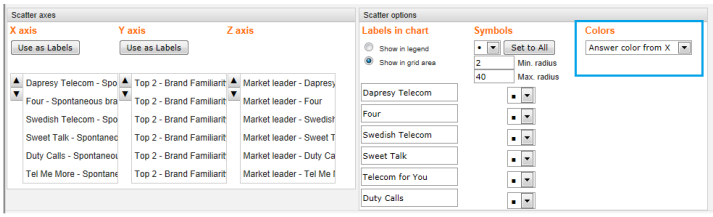
The image below highlights the symbol setup.



Color

Colors can either be defined manually (per data point) or automatically be picked from the variables used in the X or Y (or Z) axis. To set the colors use the selection list shown in the image below.

The image below highlights the color setup.



2.2.2 EXCEPTIONS IN SCATTER AND BUBBLES CHARTS

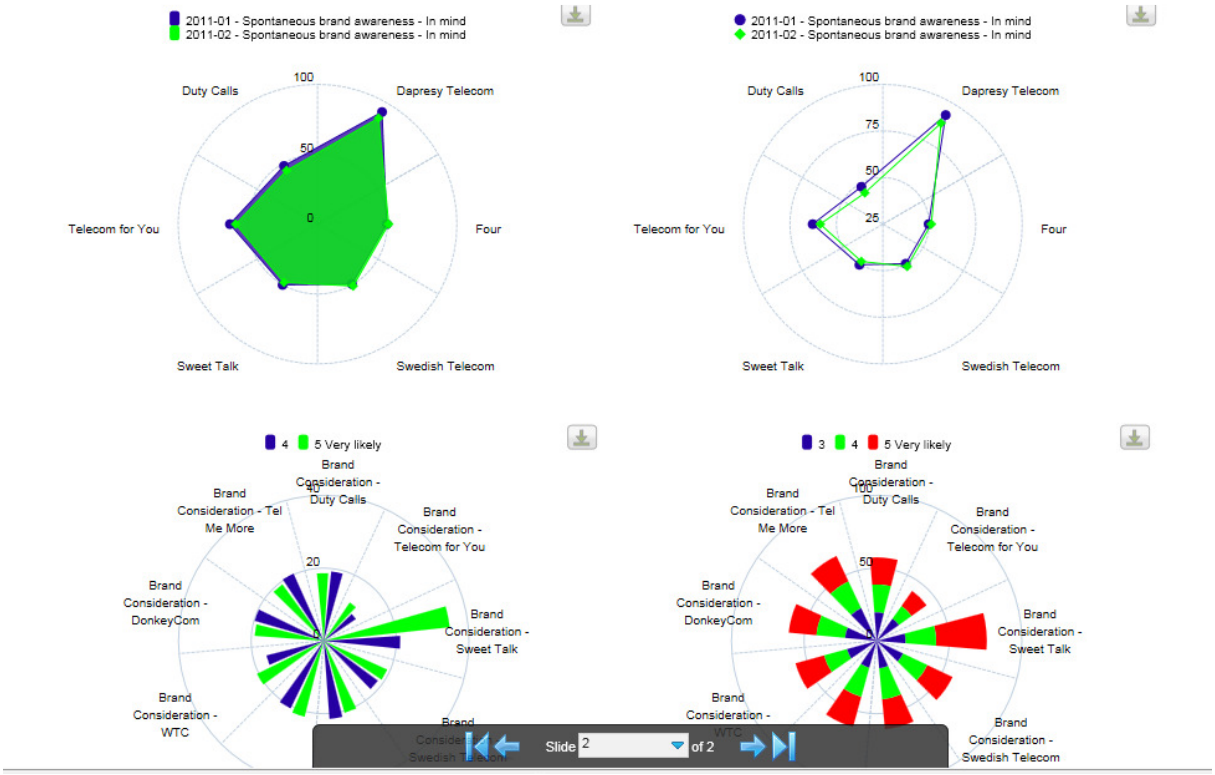
Scatter and Bubble Charts do not support the following features:

- Warn for low base
- Hide result with low base
- Show Top/Bottom X series (Top lists etc)
- Time intervals - only Full period can be used, Day, week, Month, Quarter and Year cannot be selected
- Significance testing
- In Hierarchical Filter projects unit comparison cannot be done. Only one unit at the time can be shown in the Bubble/Scatter.

2.3 POLAR CHARTS (NEW CHART SETTING)*

Polar charts are now added to Storyteller. Other software-suppliers might name the Polar chart as Radar or Spider but all are talking about the same chart type.

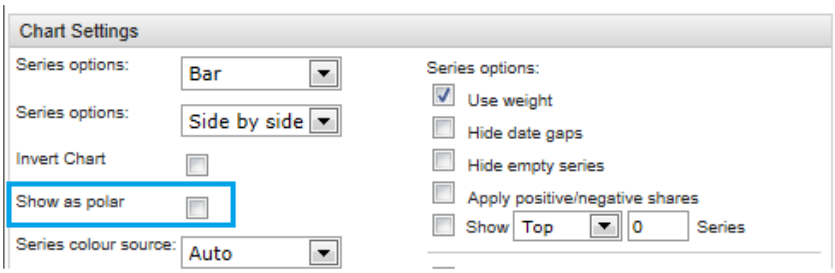
Below a few example images are shown.



Setup process

The Polar chart is not a new chart type; it is a new chart setting which can be applied to all chart types except Pie, Donut, Scatter and Bubble. So in one single switch all the regular X-Y charts can be turned into polar charts. The X axis is wrapped around the perimeter while the Y axis extends from the center to the top.

The image below shows the check box to tick to turn the X-Y chart into a Polar chart.

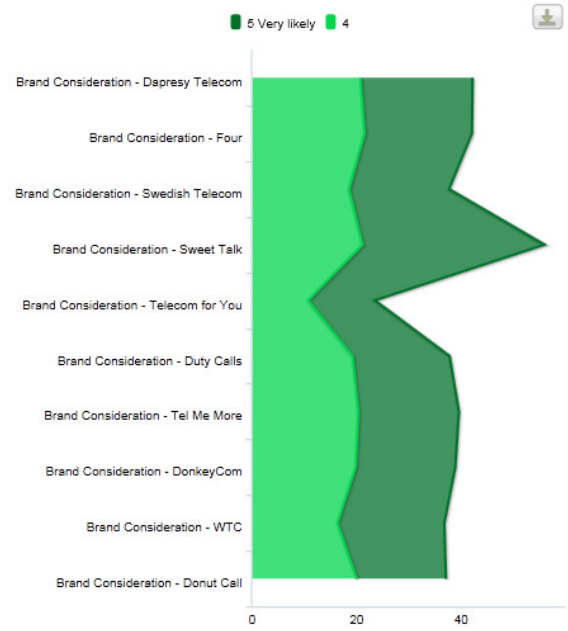


Note; the Polar setting is only an option shown in the main series, the option is not visible in additional series. This is because all series must be Polar if one series is Polar.

2.4 VERTICAL AREA CHART*

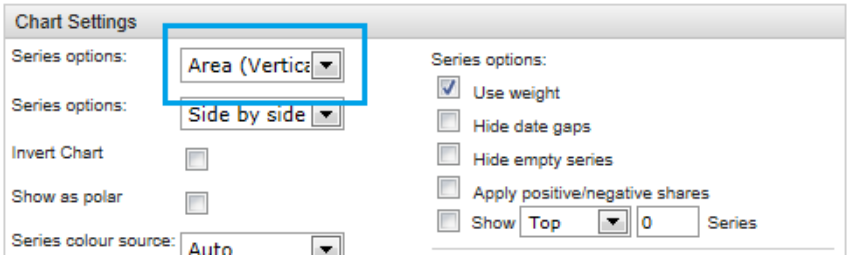
A Vertical Area chart has been added to the Storyteller chart library.

The image below shows an example of the new chart.



The new chart type is present in the chart selection list, as shown in the image below, and behaves in exactly the same way as the already existing Horizontal Area chart.

The image below shows the new chart type in the chart selection list.



2.5 NEW CHART LAYOUT SETTINGS IN STORYTELLER CHARTS*

New chart layout settings have been added for more flexibility. The list below shows the new settings and each of them are described further down.

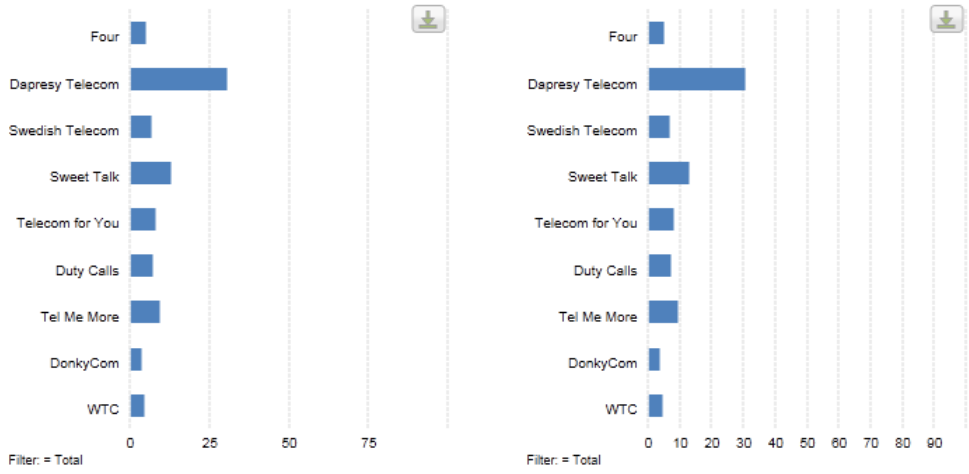
- support for manually defining the scale steps in the value axis
- support for showing last value label or not
- support for inverting charts (e.g. showing bars from right to left instead of left to right)
- support for defining the size of the data label
- support for line styling and adding markers in Line, Spline and Area charts

- support for setting a fixed size of the label area in horizontal charts

2.5.1 SCALE SETTINGS*

Support for defining the scale steps in the chart manually has been implemented, in previous versions of Storyteller the scale steps were always calculated automatically based on the scale used and the actual size of the chart. This automatic behavior is still the default option but can now be overwritten by using this new feature.

The example chart to the left below shows the automatic behavior and the chart to the right shows a manually defined scale.

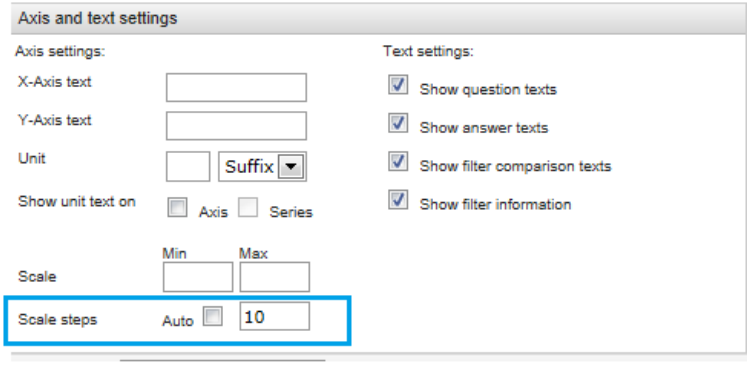


SETUP PROCESS

The new setting is located in the Settings Tab in the chart setup window.

To override the automatic scale un-select the checkbox “Auto” (highlighted in the image below) and enter the number of scale steps to be shown.

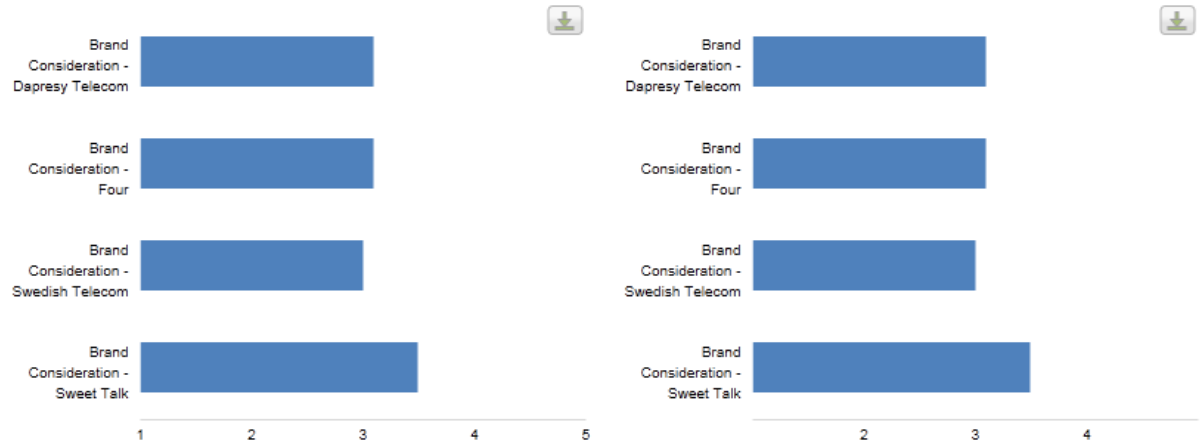
The image below shows the new controls for manually defining the scale steps in the chart.



2.5.2 SHOW LAST VALUE LABEL*

The last value label is currently hidden in all charts in Storyteller V7. But with this new feature the last value label can be turned on/off. The image below shows 2 examples, one with the setting turned on and one with the setting turned off.

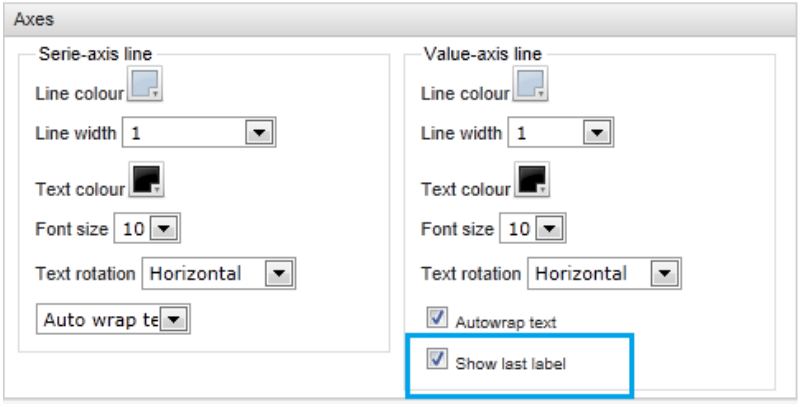
In the example images below the scale is 1-5. In the image to the right the end-tick is turned off and in the left image it is turned on.



SETUP PROCESS

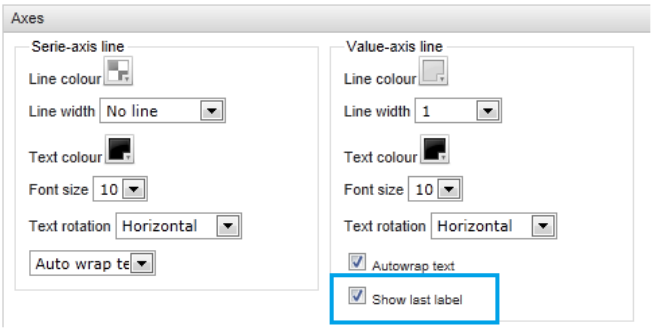
The Last value label is turned on/off in the Settings Tab in the chart setup window as shown in the image below.

The image below shows the controls for turning the end tick on/off, it is located In the Layout Tab.



Note: When the values are very high the last value label might break the chart area like in the image below. In those cases it has to be turned off to make a good looking chart.

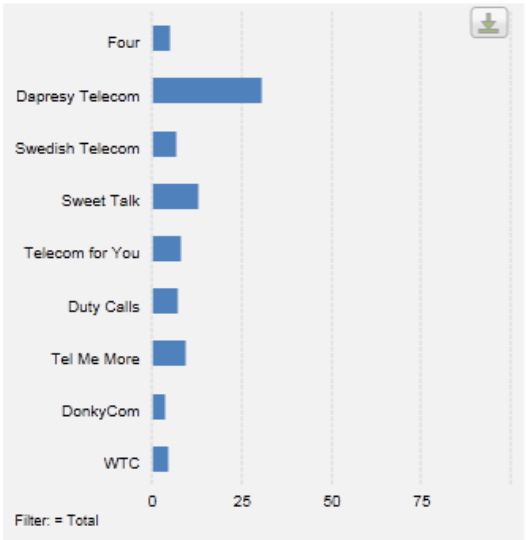
The image below shows a chart where the end last value label should be turned off.

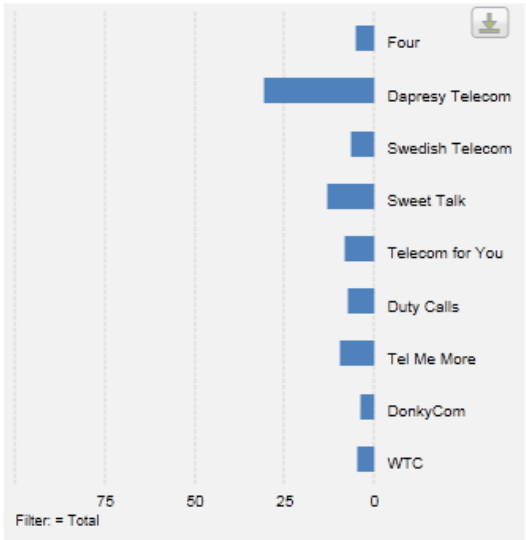


2.5.3 INVERT CHARTS*

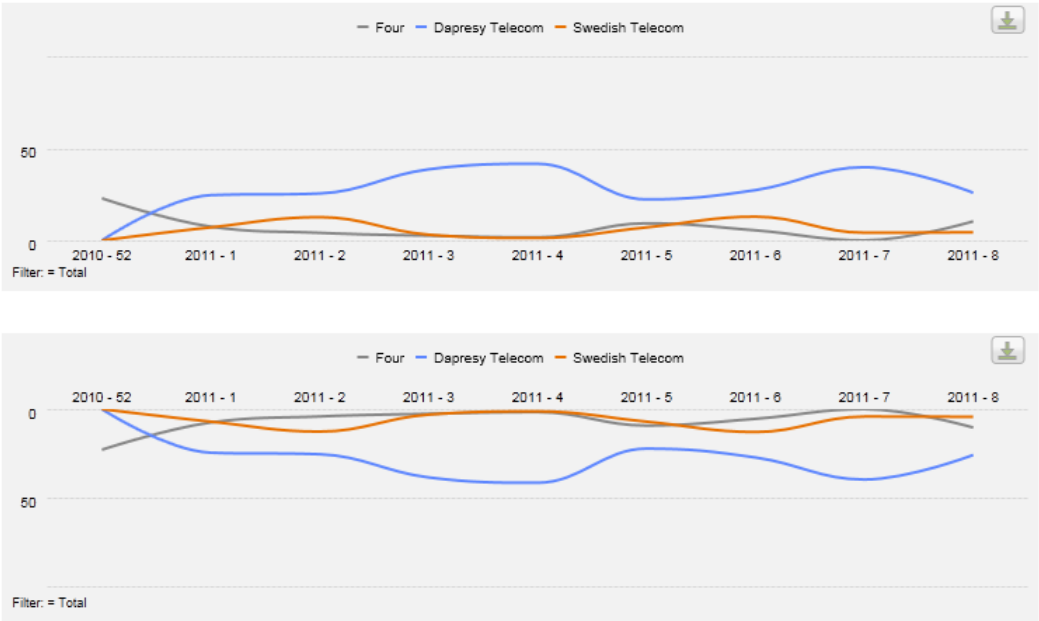
The charts can now been inverted which means that horizontal charts can be shown right to left instead of left to right and vertical charts can be shown up to down instead of down to up. Please see some example images below of inverted charts.

Example image 1: The left chart shows a regular bar chart and the right chart has been inverted.





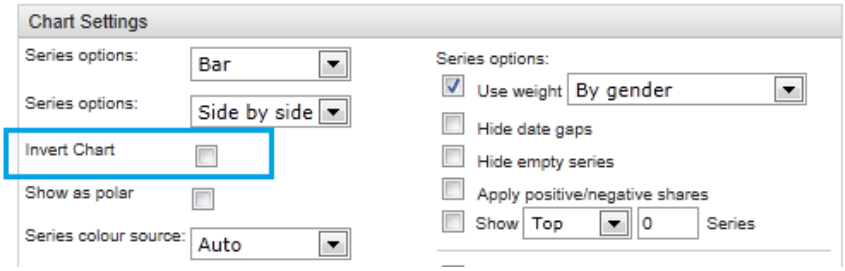
Example image 2: The top chart shows a regular line chart and the bottom chart has been inverted.



SETUP PROCESS

The control for inverting charts is placed below the chart selection in the Settings Tab in the chart setup window. To invert a chart simply check the option. All chart types except pie and donut support this new feature.

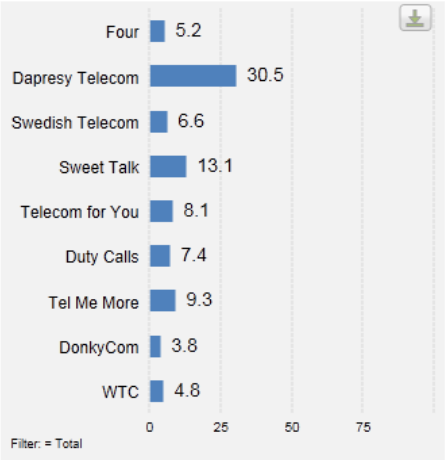
The image below shows the controls for inverting the chart, simply click the check box to invert the chart.



2. 5.4 DATA LABEL SIZE*

The size of the data label in the charts can now be changed. The default size is 10 and it can be changed from 5 up to 20.

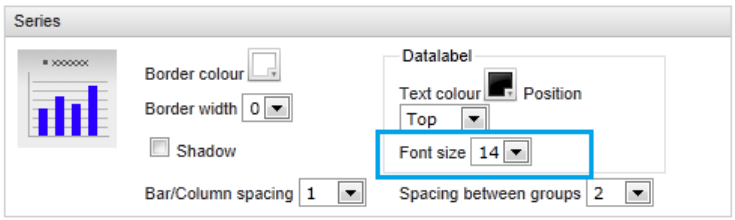
The image below shows a chart with a data label in size 14.



SETUP PROCESS

The control of the label size is placed in the Layout Tab in the chart setup window close to the other data label settings.

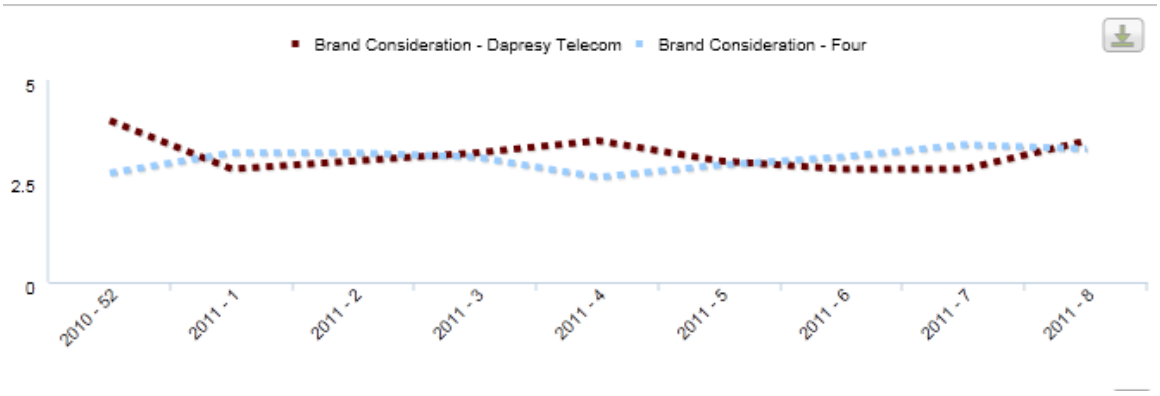
The image below shows the controls for changing the size of the data label.



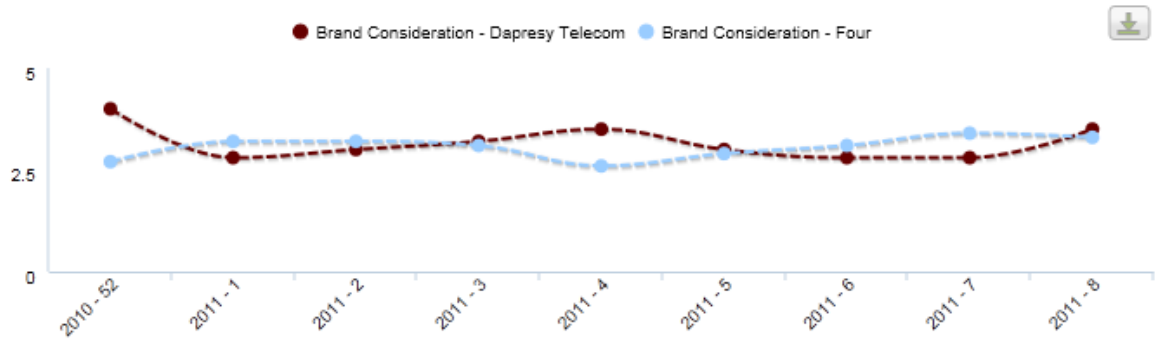
2. 5.5 LINE STYLING AND MAKERS*

The series line in the Line, Spline and Area charts can now be styled. Both the style and the thickness of the line can be defined. Styling markers can also be added to the chart. The below images show a few different examples.

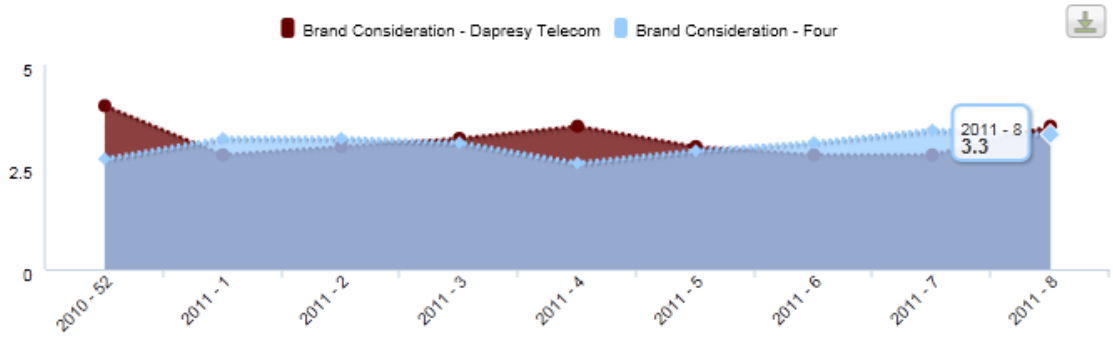
Example 1: The Line chart shows a dotted line in thickness 4 (the default setting is a solid line in thickness 1)



Example 2: The Spline chart shows a dashed line in thickness 2, circles are used as markers.



Example 3: The Area chart shows a dotted line in thickness 4, the Auto option is used for adding markers.

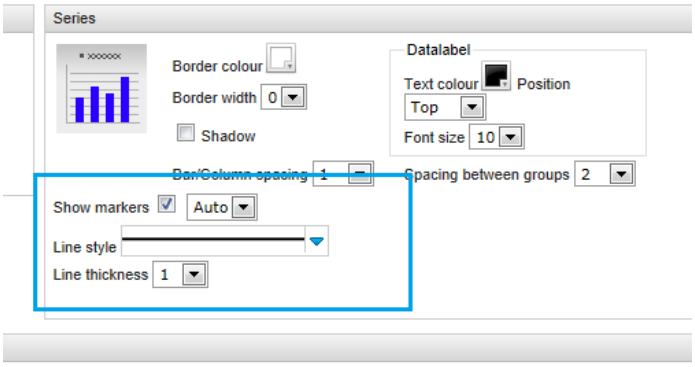


SETUP PROCESS

To change the style or the thickness use the controls highlighted in the image below. To add markers select the marker to use or the Auto option.

The settings will be applied to all series in the chart so in this version it is not possible to make only one series more thick or dotted - all series will get the applied settings.

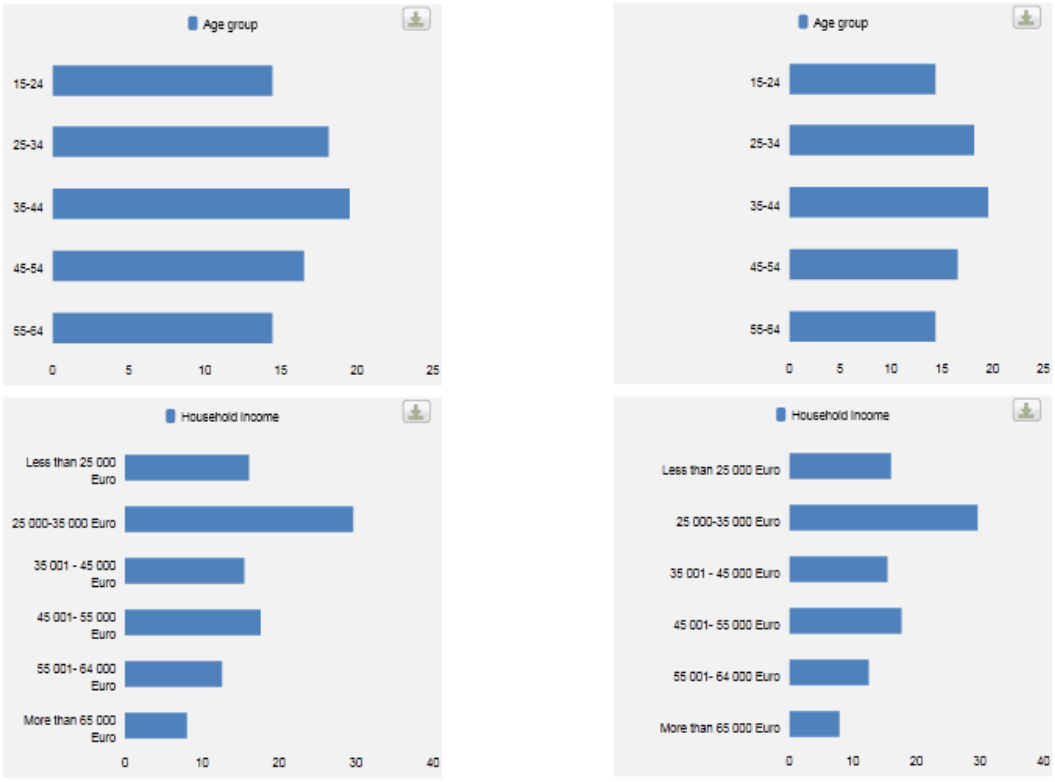
The Image below shows the controls to use for changing style and thickness of the lines.



2. 5.6 FIXED WIDTH OF LABEL AREA*

A new setting for manually defining the size of the label area makes is possible to align charts like in the right example in the image below.

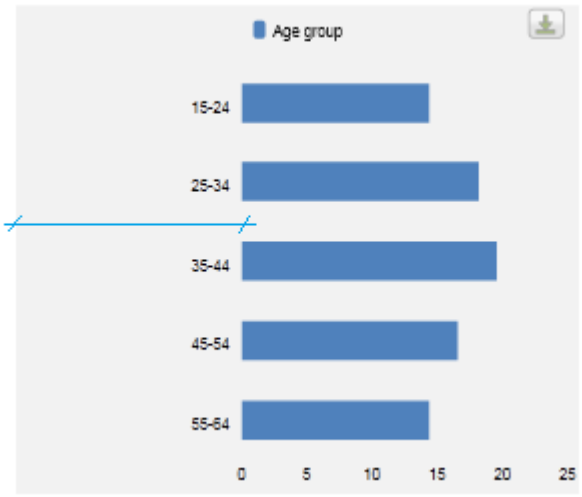
The left example image shows the automatic label area behavior and in the right example the new Label width settings have been used to align the charts. The label width has manually been defined to 150 pixels in both charts, which makes them align with each other.



SETUP PROCESS

The function is supported in all horizontal charts and the width is defined in pixels.

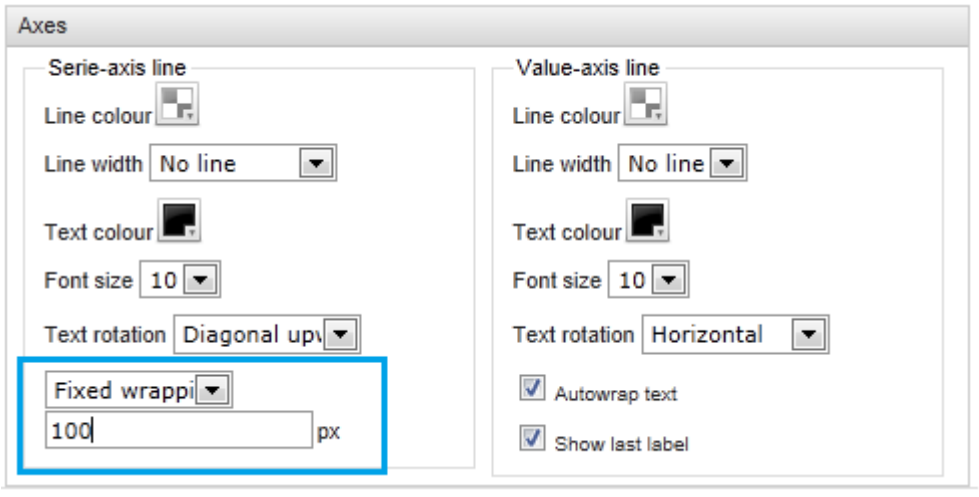
The image below shows the label area in a bar chart, the shown width is defined in pixels during the setup of the chart (if the new setting is used).



In previous versions two options for label wrapping did exist, either the labels were shown without row breaks (without wrapping) or an auto-wrapping function was used to create row breaks automatically. These new settings are still kept and auto-wrapping is still the default option.

To define the fixed label area width use the controls shown in the image below, which are located in the Layout Tab in the chart setup window.

The image shows the new controls for setting a fixed label area width, it is located in the Layout Tab.

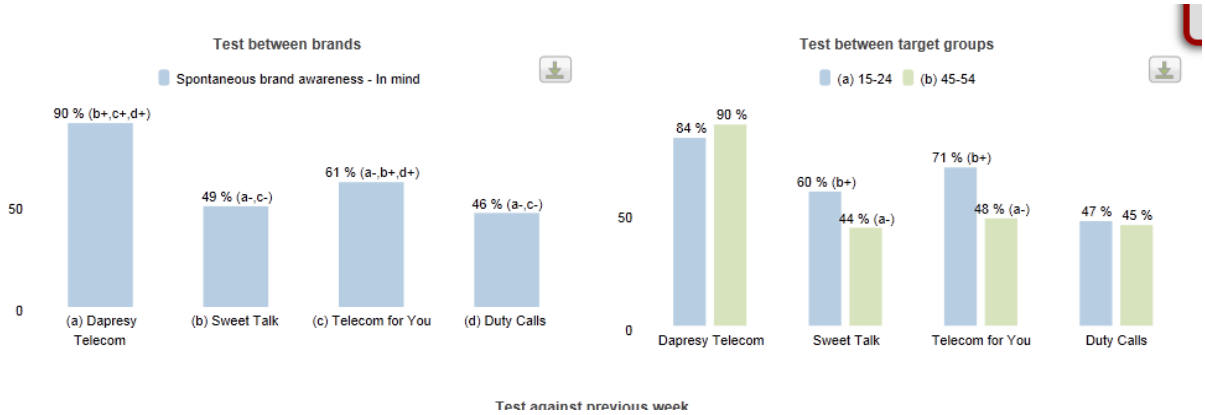


2.6 SIGNIFICANCE TESTING IN STORYTELLER CHARTS

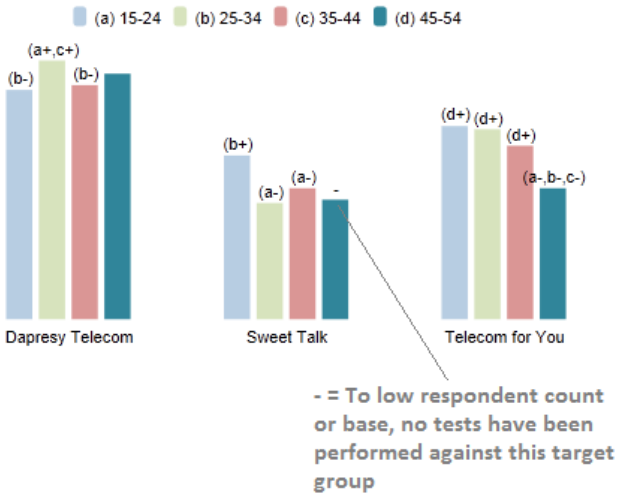
Significance (Z test) tests can now be used in Storyteller charts; a feature used throughout the industry. The test can be performed in both mean values and in proportions. It can also for instance be performed between brands, target groups and time periods.

Below some examples are shown. Significant differences are indicated with a suffix followed by a + or a -. The prefix shows to which data point the test has been performed, the prefix is added automatically be the system when significance tests are active. The prefix is only added when the test is performed between all data points, if the test is performed against the previous or next data point no prefix will be added.

The image below shows some examples of significance testing in charts.



As shown in the mage below some series have been marked with a "-". This means that the base or the respondent count for those particular answers is too low and no test has been performed.

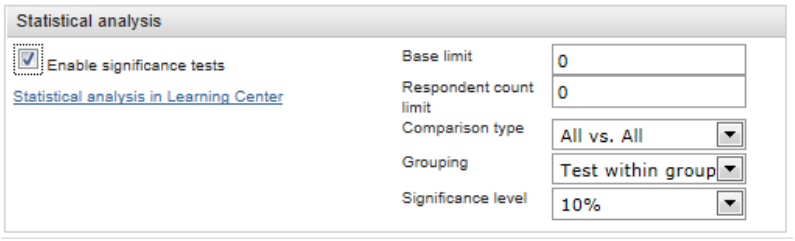


2.6.1 SETUP PROCESS

When using significance testing the following selections must be done:

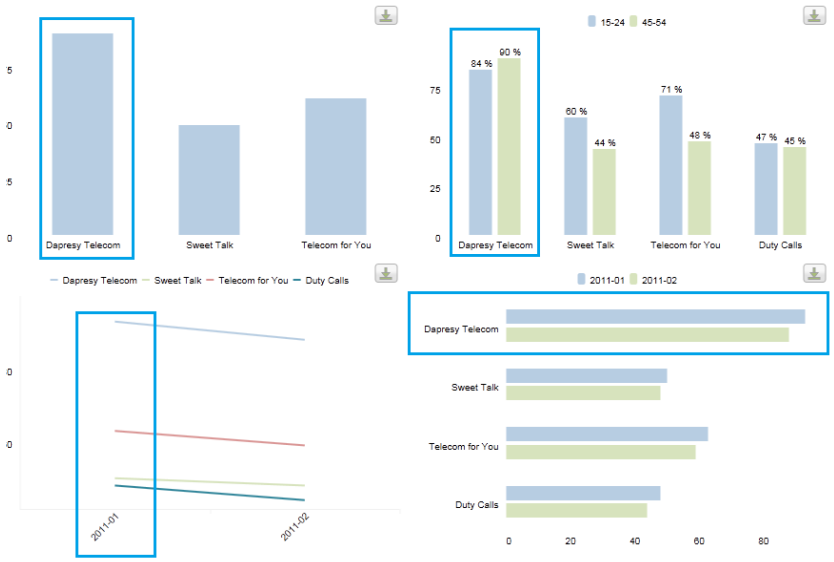
1. The base size limit - no test will be performed if the base size is too low
2. The respondent count limit - no test will be performed if the respondent count of the particular answers does not fulfill the limit
3. Define if the tests should be performed between all data points, or against next data point or against previous data point
4. Define if the test should be performed "within the group" or between "groups"

The image below shows the significance test options in the Settings Tab in the chart setup in Storyteller.



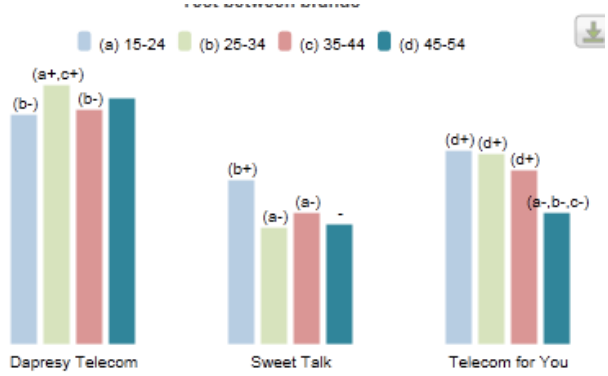
A group (see point 4 above) is a text on the series axis, see some example images below. The highlighted area in each chart example below is one group. If the test should be performed within those variables and not against other variables the selection should be "Test within groups".

The example charts below highlight a "group" within each chart.

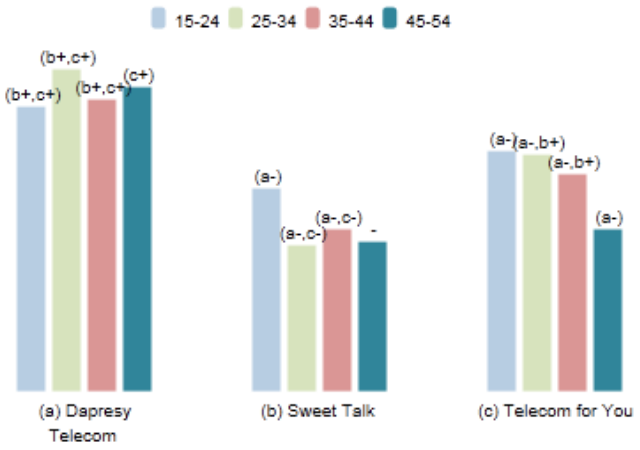


The example images below show some different combinations of significance testing.

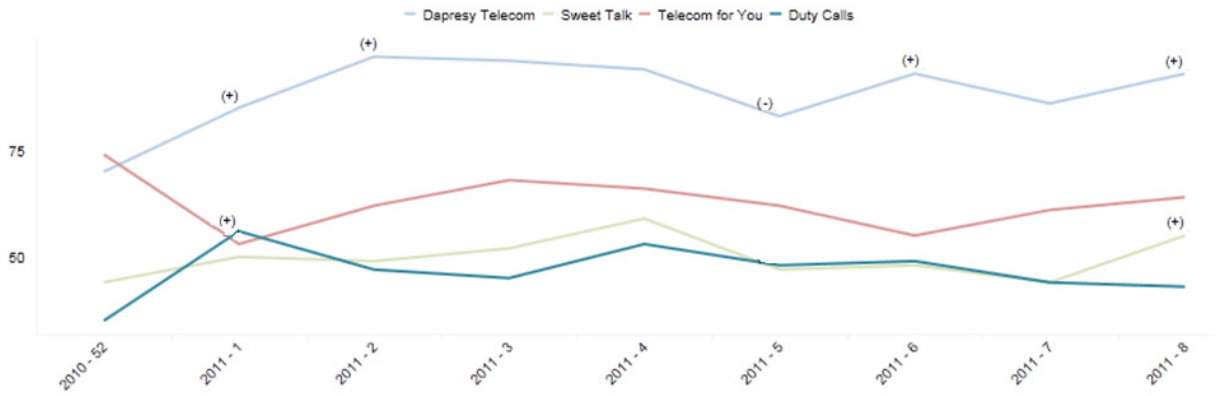
Example 1 shows a test within groups and All vs. All. This means that all age groups are tested against each other within a brand.



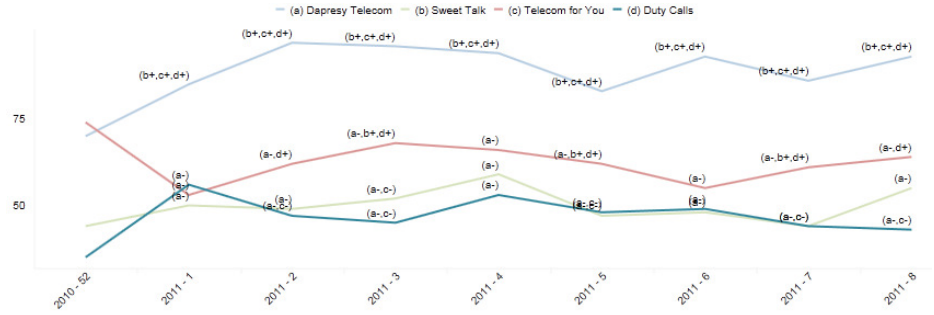
Example 2 shows a test between groups and All vs. All. This means that all brands are tested against each other within an age group.



Example 3 shows a test between groups and against a previous data point. This means that the result of each brand is compared to the result the month before.



Example 4 shows a test within groups and All vs. ALL. This means that the result of each brand is compared to the result of the other brands the same month.



2.6.2 USED CALCULATION

Dapresy Pro uses a Z-test for significance testing of 2 independent samples. The test can be used for comparing means or proportions. If the shown result is based on weighted numbers, the respondent count in the significance tests is weighted as well.

Null hypothesis used is:

$\mu_1 - \mu_2 = 0$ *(compare means)*

or

$\pi_1 - \pi_2 = 0$ *(compare proportions)*

Test function used is:

$$Z = \frac{(X_1 - X_2)}{\sqrt{\frac{S_1^2}{n_1} + \frac{S_2^2}{n_2}}}$$ *(compare means)*

or

$$Z = \frac{(P_1 - P_2)}{\sqrt{P(1-P)(\frac{1}{n_1} + \frac{1}{n_2})}}$$ *(compare proportions)*

2.6.3 EXCEPTIONS

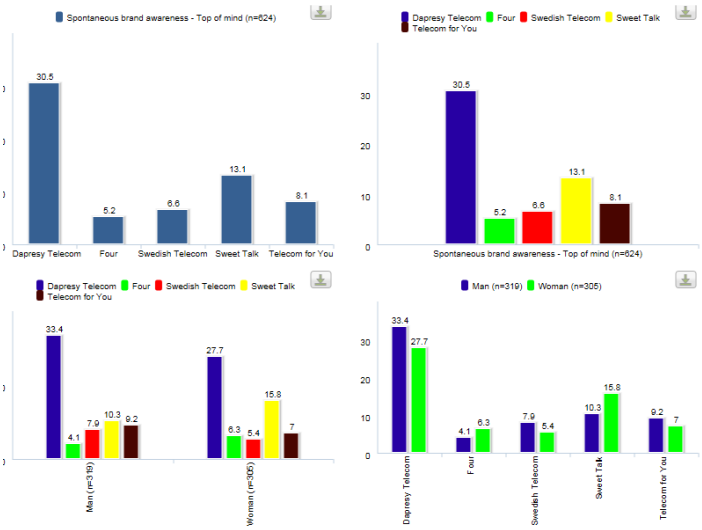
Significance testing can be done in all chart types except Scatter and Bubble Charts.

Note: The limit for hiding series can be a lower value than the base size limit used in significance testing. It will work, but the result will be confusing for the users so it is not recommended.

2.7 SHOW BASE SIZE IN CHARTS

Support for showing the base size in charts has been implemented. The option is supported in all chart types except Scatter/Bubble.

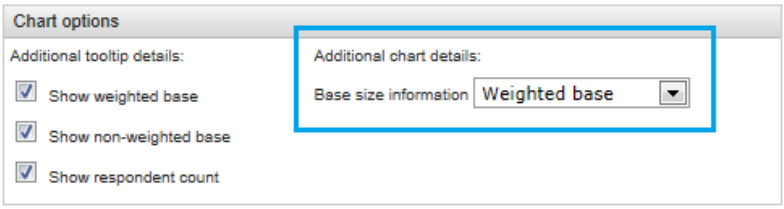
The images below show some example charts, the base size position is shown in different places depending on the content in the chart.



2.7.1 SETUP PROCESS

When you set up a chart, the administrator can define if the base number should be shown or not and also if the shown base should be weighted or unweighted. The selection is done in the Settings Tab in the dropdown list shown in the image below. As a default no base is shown.

The image below highlights the Base selection dropdown list in the Settings Tab.



Depending on the content in the chart the base size will be shown in different places in the charts. The position of the base is defined automatically by the system. The following rules and logic are used;

1. Base size shown as suffix to **Question text** (as shown in chart 1 and 2 below) if;
    a. no Filter compare or Time compare (day, week, month, quarter, year) is present
2. Base size shown as suffix to **Filter/Time period compare text** (as shown in chart 3 below) if;
    a. compare if Filters or Time period comparison is present
3. Shown in the **serie**s (as shown in chart 4 below) if;
    a. Multiple questions and multiple answers and either Filter compare or Time periods comparison is present
    b. If Filter Compare and Time period comparison is present
    c. If Filter Compare is selected in two or more filters

Some example images of base size position are shown below - the numbers refer to the list above.

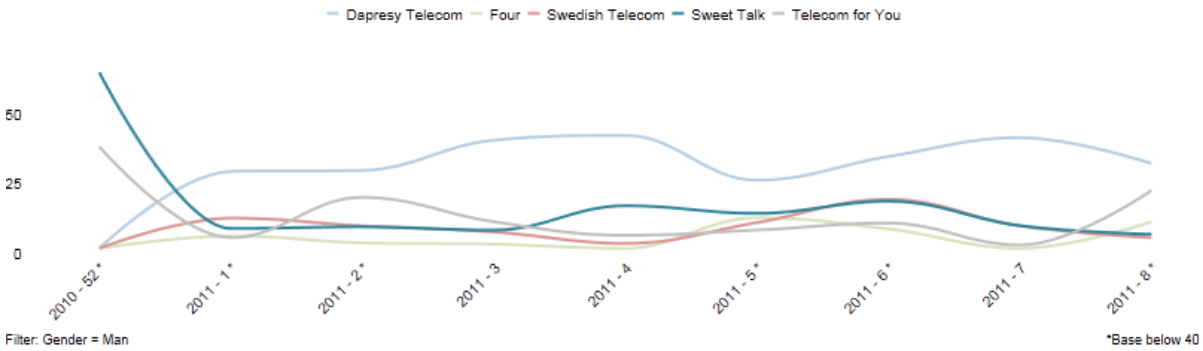
Note: if the text where the base size is shown has been hidden in the chart due to the setup the base size will not be shown even if it is activated.

2.8 BASE SIZE WARNINGS/HIDE RESULT WITH LOW BASE

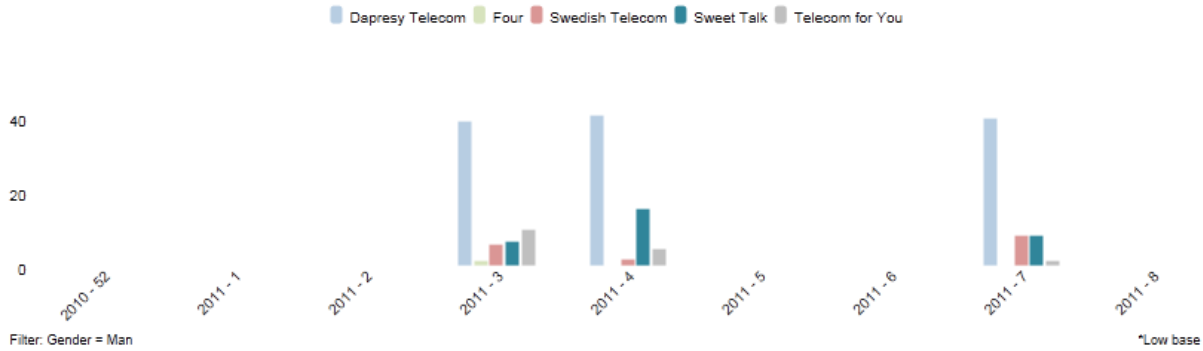
Support for hiding results with low bases or warn when the base is too low has been implemented in Storyteller charts. This makes it possible to report for instance Employee and Customer Satisfaction projects in the Storyteller as anonymity rules are crucial in those projects.

Below some example images are shown, as you see a text is shown in the bottom of the chart that either warns for a low base or explains that some results have been hidden due to a low base. Both Warn and Hide can be used at the same time, for instance results with a base less than 5 are hidden and result with a base between 5 and 10 are shown but with a warning for low base. The limits are freely defined during the setup and can be based on weighted or un-weighted respondent counts.

Example image 1; a base size warning is used in a time chart, as shown week 52, 1, 2, 5, 6 and 8 has a low base.



Example image 2; result with low base is hidden.



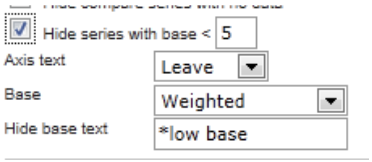
Note: Both 'Hide' and 'Warn' can be used at the same time the Hide has the highest priority. So a series with a base 4 will be hidden if the limit for hiding is 5 and the limit for warn is 7.

2.8.1 SETUP - HIDE SERIES

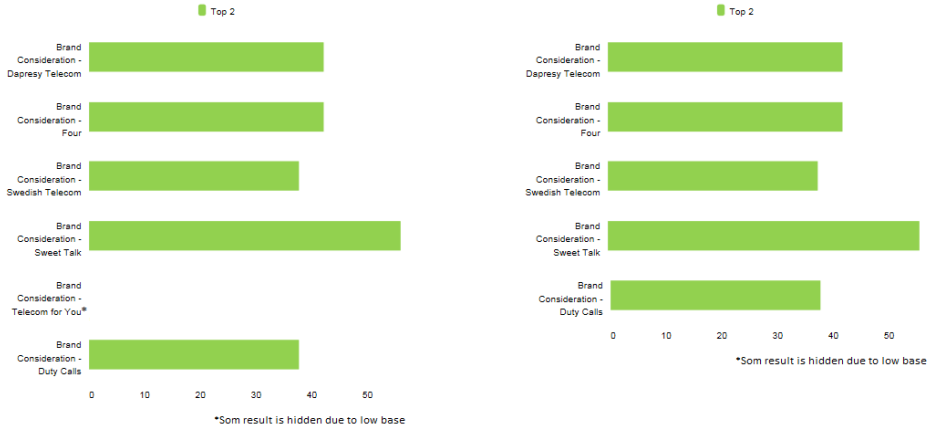
The settings for hiding results (series) with a low base are done on a chart level and not on a report level. In the setup the following selections must be done:

1. The respondent limit
2. Select if the limit should be based on Weighted or un-weighted respondent count
3. Define if the axis text of the hidden series should remain or be removed (see example images below)
4. Enter an information text to show in the bottom of the chart, the text is only shown when at least one series has been hidden.

The image below shows the setup controls in the Settings Tab.

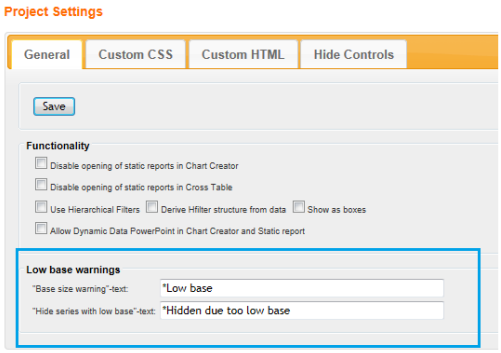


The two example images below refer to point 3 in the list above. One variable has a low base and thus those results are not shown. In the right chart the axis text is still shown and in the left chart the axis text has been removed.



Note; a default “Hide base text” can be defined in the Project settings page, the text entered in the Base size warning text field in the Project settings page will be default when setting up a new chart. The text can be changed per chart during the setup.

The image below highlights the default text in the Project settings page.

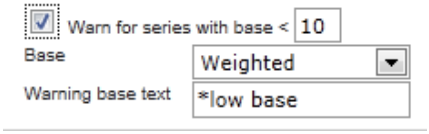


2.8.2 SETUP - WARN FOR LOW BASE

The settings for warning for low base sizes are done on a chart level and not on a report level. In the setup the following selections must be done:

1. The respondent limit.
2. Select if the limit should be based on weighted or un-weighted respondent count
3. Enter an information text to show in the bottom of the chart, the text is only shown when at least one series has a low base.

The image below shows the setup controls in the Settings Tab.

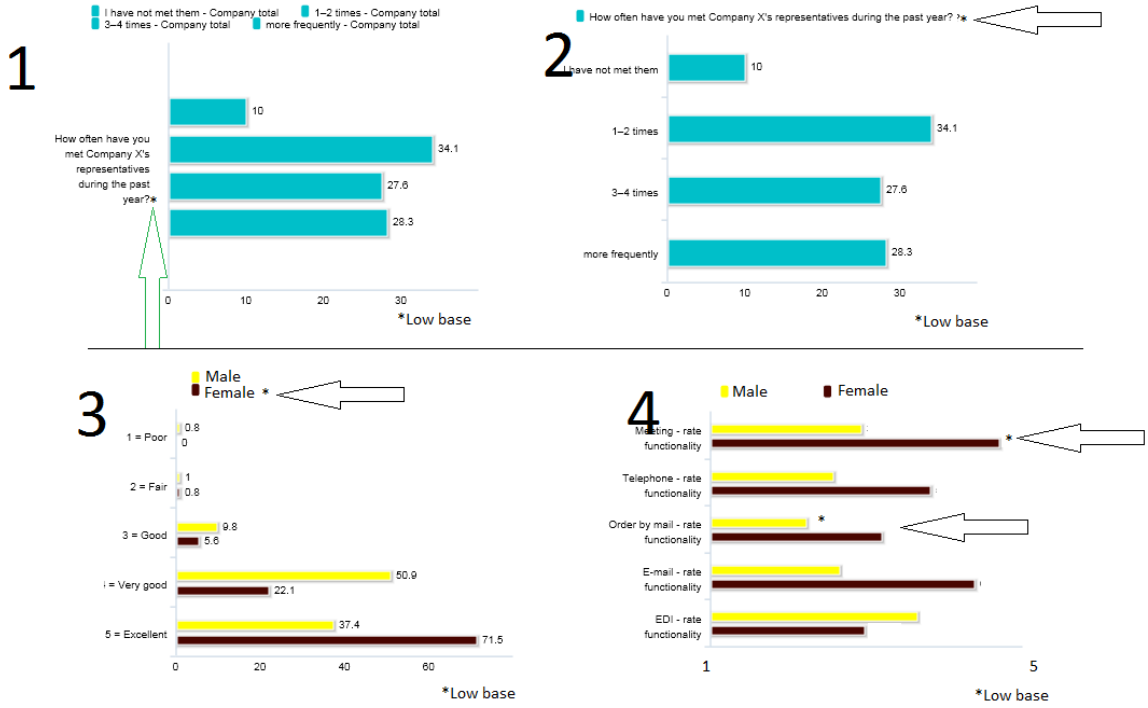


Note; a default "Warn base text" can be defined in the Project settings page. The default text will be used in all new charts, unless it is edited in the chart setup.

The series with low base are indicated with an * in the charts as shown in the example images above. The * is shown in different positions depending on the content in the chart, the following logic is used:

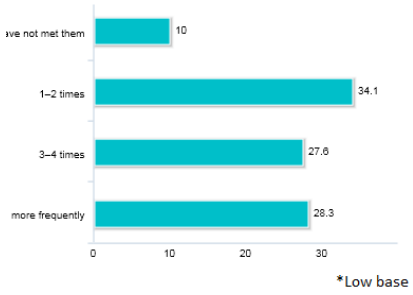
1. Indicated in the **Question text** (as shown in chart 1 and 2 below) if;
    a. no Filter compare or Time period compare (day, week, month, quarter, year) is present
2. Indicated in the **Filter/Time period compare text** (as shown in chart 3 below) if;
    a. compare in Filters or Time period comparison is present
3. Indicated in the **serie**s (as shown in chart 4 below) if;
    a. Multiple questions and multiple answers and either Filter compare or Time periods comparison is present
    b. If Filter Compare and Time period comparison is present
    c. IF Filter Compare is selected in two or more filters

*Some example images of * position are shown below, the numbers refer to the list above.*



Note; if the text where the * is shown is not displayed in the chart (texts can be hidden during chart setup) the * will not be shown at all, though the message will still be shown below the chart. In the example below the * is shown in Question text but the question text is hidden and thus not shown in the chart.

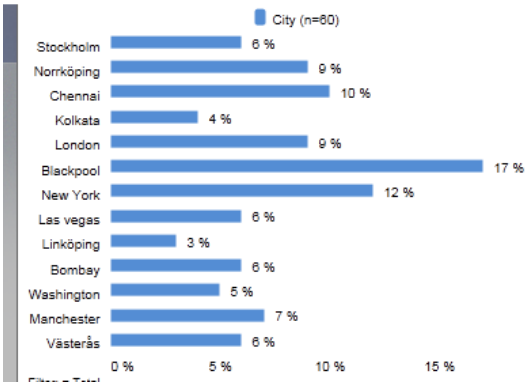
*The example below shows a chart with low base, the * is shown in the question text but the question text is hidden.*



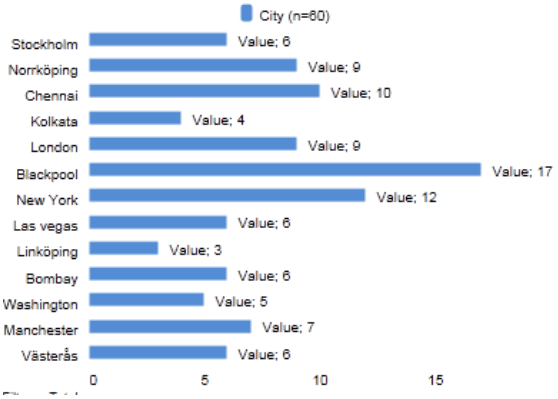
2.9 PREFIX/SUFFIX TO Y-AXIS IN CHART

A new option for adding any text as prefix or suffix to the data labels has been added, see some example images below.

Example image 1, "%" used as a suffix both in the series and in the axis;

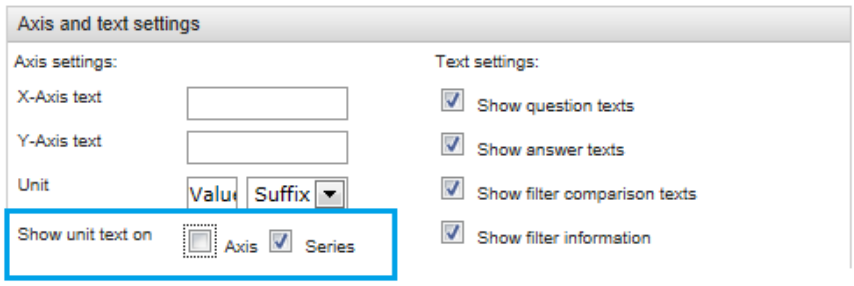


Example image 2, "Value;" used as a prefix but only in the series and not in the axis;



2.9.1 SETUP PROCESS

To add a suffix or a prefix, please enter the Settings Tab in the chart setup and use the controls shown in the image below.



1. Enter desired text in the text field
2. Select if it should be shown as suffix or prefix
3. Select where to show it (Axis and /or series)

2.10 OPTIONAL CHART SETTINGS

A new option makes it possible for Report users to drill-down into and further query data to make their own analyses. Users will have the possibility to change variables, filters, time periods etc. on each individual chart in Storyteller dashboards.

The "Optional chart settings" feature is turned on or off per Storyteller report. Also different options of what possibilities the users will have can be defined to limit their possibility to change the charts. The following options are present (multiple selections can be done);

- Access to changing variables
- Access to changing Filters
- Access to changing Time periods
- Access to changing chart type
- Access to All settings – (All settings = all controls shown during a regular chart setup in Storyteller is shown for the end-user).

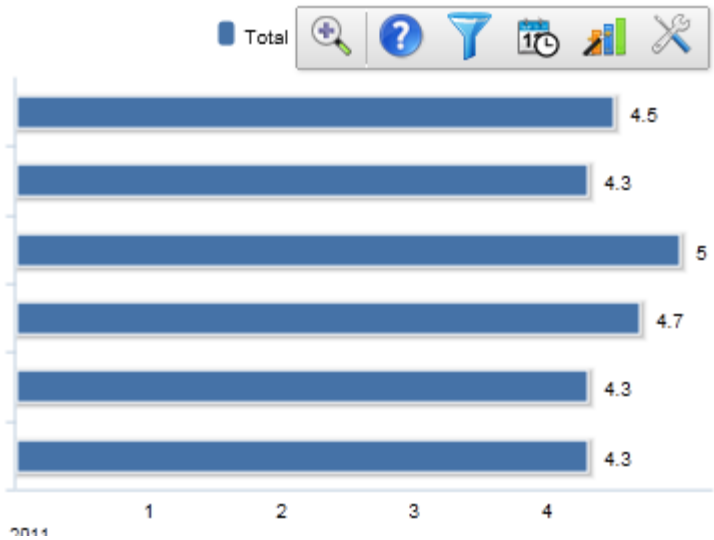
Note: The settings are done on a report level and not on an end-user level. If different users should have different access it can be solved with a work-around. Create multiple reports and assign those to different users.

2.10.1 END USER VIEW

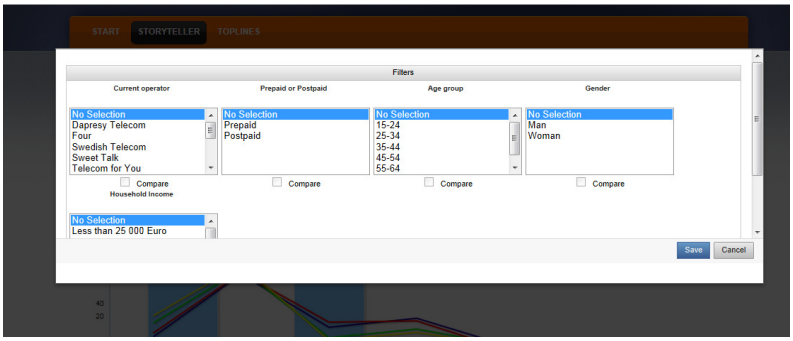
To use the new "Optional chart setting" feature as an end-user do as the following:

1. Hover the mouse over the chart and the present options appear in a panel as shown in the image further down. The available options in the list depend on the setup.
2. In the list the user selects an action, for instance: change Filters.
3. A popup window appears as shown in the second image below and the needed updates can be done. The Storyteller chart is eloaded based on the new settings when clicking "SAVE" in the bottom right corner in the popup window.
4. The chart will be shown with the changes until the Storyteller page is reloaded (changing slide is not reloading the page but other actions like selecting another report or selecting any Optional filters force a reload of the page).
5. If an export to PPT is done the changes will be included in the downloaded PPT report.

The image below shows the panel that appears when moving the mouse over the chart. Note; the content in the panel depends on the setup.



The image below shows what the Filter options look like for the end user.

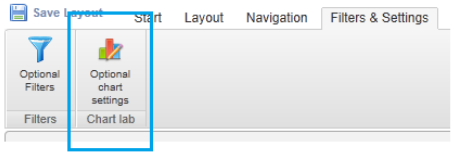


2.10.2 SETUP PROCESS

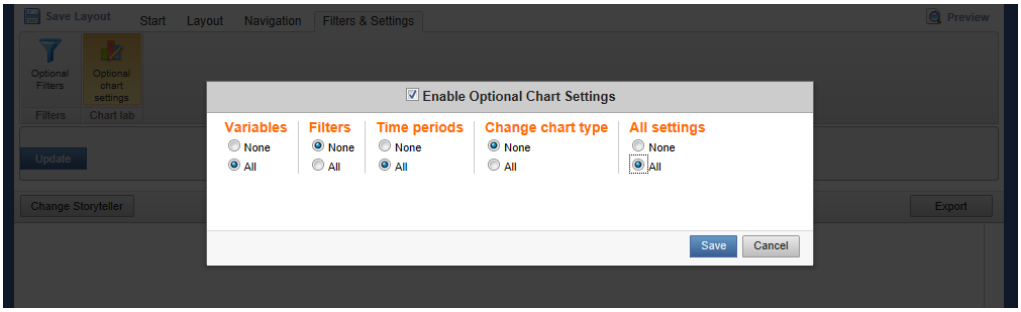
In the setup process you select which actions should be present in the list when right clicking on a chart in the end-user view (which features the user should get access to). The settings are done in a popup window (see second image below) that appears when clicking the icon shown below.

1. Click Enable “Optional chart settings” to activate it
2. Select All to include an option and None to not include an option

The image below shows the Filter and Settings Tab in the Storyteller setup, the new option Optional chart settings is highlighted.



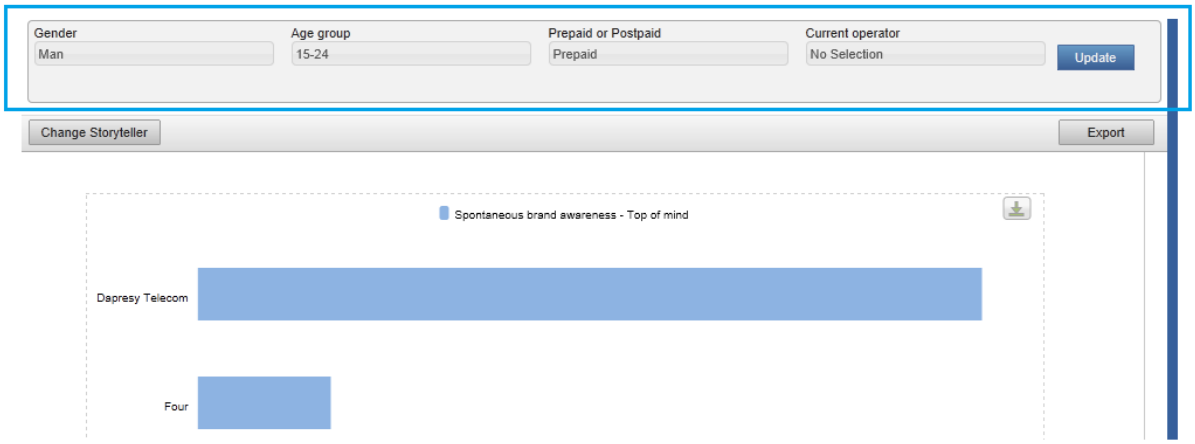
The image below shows the popup window. In this window the Optional chart settings are done.



2.11 SUPPORT FOR MULTIPLE OPTIONAL FILTER BOXES*

The Optional Filter support has been improved so the selected filters can be shown in separate filter boxes instead of a single filter box. This means that the end-user now has the possibility to combine filters in the Optional filter selections (if the setup allows that). Also other improvements such as: multiple selection and use of "No Selection" have been added. See further explanation in the following chapters.

The image below shows an example of multiple optional filters.

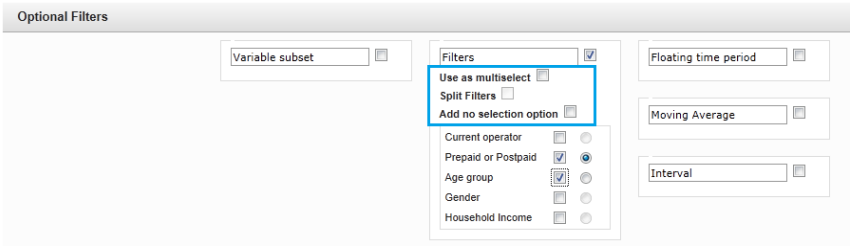


SETUP PROCESS

During the setup of Optional filters the administrator can define the following new settings:

1. If the filters should be shown in one list or one list per filter
2. If multiple selections should be possible to perform in the lists or only single selection
3. If a “No selection” option should be available or not in the filter lists

The image below shows the setup of the Optional Filters.



As a default the Optional Filters behave as before; all selected filters are shown in a single box. No “No-selection” is present and only a single selection can be performed in the box.

To show the Filters in one selection box per filter check the option “Split filters”.

To allow multiple selection in the Filter boxes check the option “Use as Multi select”

To add a “No selection” - click “Add no selection option”

NOTE: DATA FOR COMBINED FILTER SELECTIONS WILL NOT BE PRE-GENERATED

When data is pre-generated results are only calculated per single filter alternative. This means that no combined filter selections will be pre-generated. So if multiple filter boxes or multiple selection in a single list have been enabled the results will not be based on pre-generated data as soon as the user combines two or more filters - instead it will be calculated on the fly.

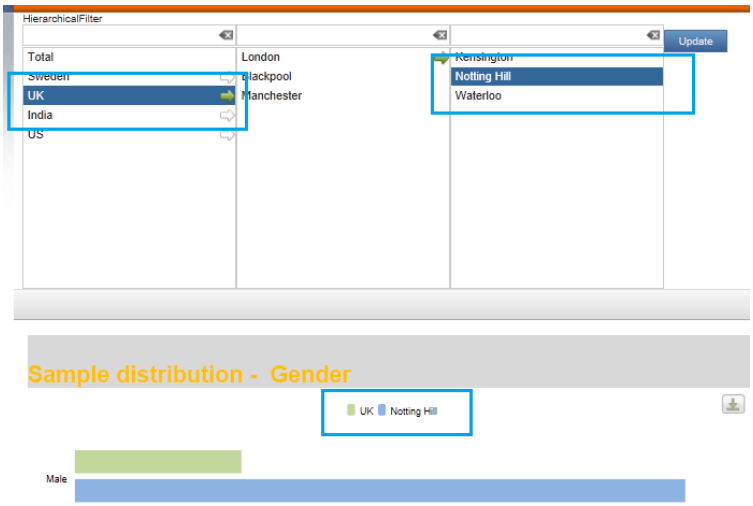
Tip: If any specific combined filter alternatives needs to be pre-generated for best performance those options can be created in a Computed variable which then can be used as a Filter variable.

2.12 NEW MULTI SELECTION OPTIONS FOR HIERARCHICAL FILTERS.

In Storyteller a Hierarchical unit structure can be used for filtering the data. In previous versions of Dapresy Pro the hierarchical structure was shown in a List box (a dropdown list). Only single selection was possible to perform, so just one unit could be selected at the time.

A new option for showing the units in a Multi selection box view has now been implemented. In this new way of displaying the hierarchical structure each level in the structure is shown in a separate selection box and multi selections can be done.

The image below shows the new way to display the hierarchical structure in Multi selection boxes. As shown Countries, Cities and Area is shown in different selection boxes in a hierarchical structure. Both UK and Notting Hill are selected and shown in the chart in this example.

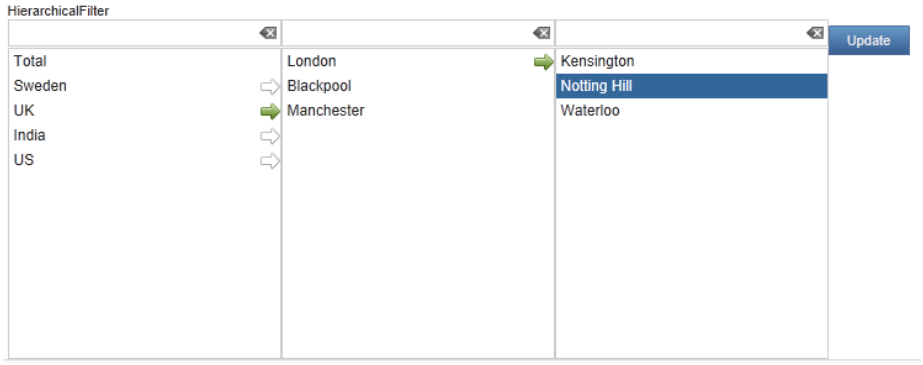


END-USER VIEW

In the end-user view the access rights logic is the same as in the previous way of showing the structure, a user can only select a unit he has access rights to.

When entering a Storyteller, which uses the new Multi selection boxes, only one box is shown as default. To view units in the lower level boxes the Arrow is used to go to the next level in the hierarchy. If clicking an Arrow it becomes green which means that the child units are shown in the next box. It is possible to show child units for multiple units at the same time.

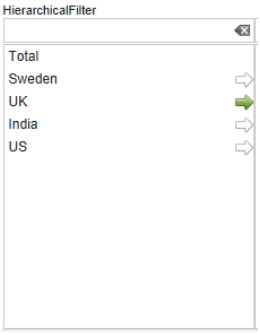
In the image below the green arrows indicate filtering to next box. Noting Hill is marked blue which means that Noting Hill is the only selected unit in this example.



To select a unit it must be clicked, it becomes blue. To select several units use Crtl and Shift like in for instance Word and Excel for selecting multiple items. It is possible to select units from boxes in different levels at the same time.

Note; each level in the hierarchical structure (except level 1 and 2) is shown in separate boxes. Levels 1 and 2 share a box as level 1 always consist of one unit only (the total).

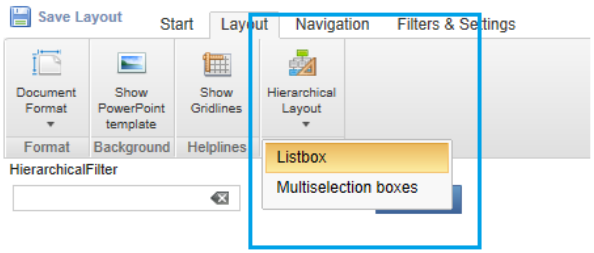
The image below shows that level 1 (Total) and level 2 (different countries) share the same selection box.



SETUP PROCESS

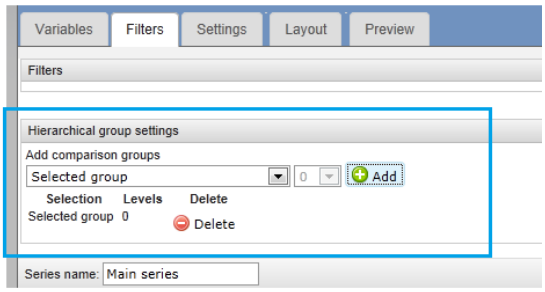
A new button named Hierarchical Layout is present in the Storyteller Layout Tab. When clicking the button two options appear: List box and Multi selection boxes. The List box is the default setting. If changing to the Multi selection boxes option - click Save Layout to view the new option.

The image below shows the new settings for selecting layout of the hierarchical structure.



Note; if multi-selection boxes are used - the charts in Storyteller must have been setup accordingly. For instance the option to show the “Selected units” (see the image further down) must have been used as otherwise only filtering and not comparison will be used. You also need to define if the selected units should appear on the axis or in the legend. If units are placed in the legend it is important to select to pick the colors from the Default color template so each unit always has a distinct color.

The image below shows the selection in the Filter Tab in the chart setup. “Selected group” must be selected if comparison should be used when the end-user selects more than one unit, otherwise an aggregated result will be shown.



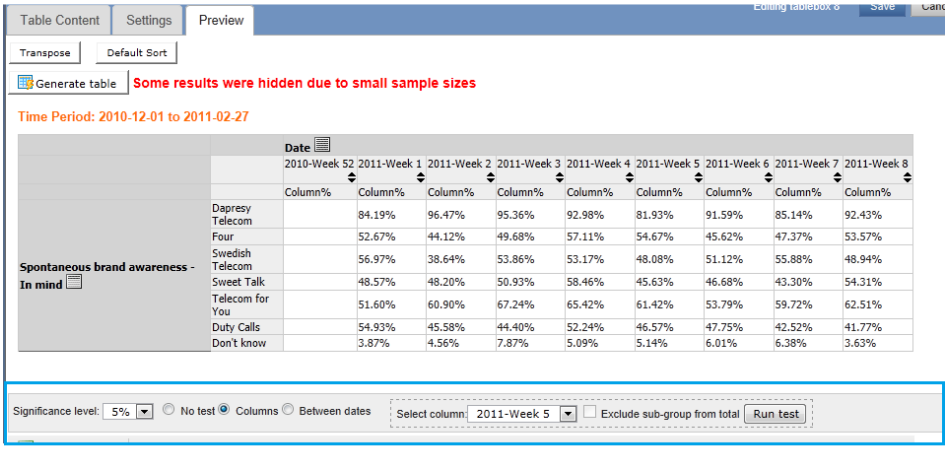
2.13 IMPROVEMENTS IN CROSS TABLES*

In the Cross Table Tool in Storyteller the following improvements have been done;

1. The significance testing function in the Cross Table Tool is now supported in Storyteller tables.
2. The 'warn for low base'-function in the Cross Table Tool is now supported in Storyteller tables.
3. Results with low bases can now be used in Storyteller tables.
4. The export to PowerPoint has been changed. The table can now be exported as an image to get the exact position and size in the PowerPoint slide as shown online.

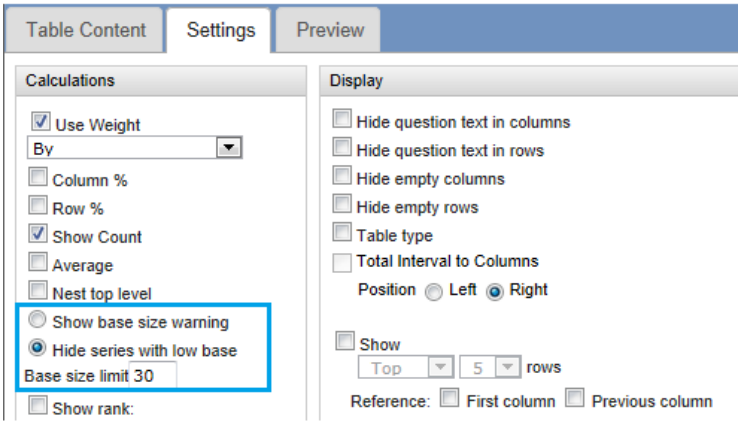
The significance testing function works in exactly the same way as it does in the ordinary Cross Table Tool, the controls are found in the Preview Tab as shown in the image below.

The image below shows the significance testing controls in the cross table setup.



The improved 'warn for low base'-function and the function for hiding results with low bases are explained in detail in chapter 4.7.

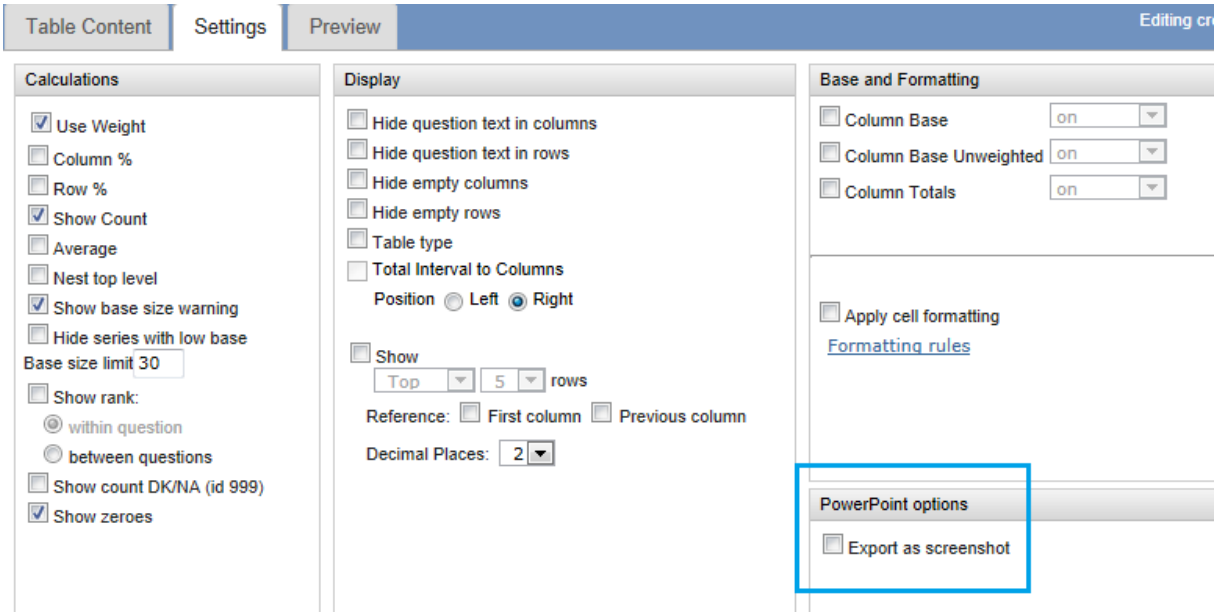
The image below shows the new Hide/Warn controls for low bases.



The export format option controls are found in the Settings tab as shown in the image below. If the check box is checked the table will be exported to PowerPoint as in image. When the table is exported as an image it will get the 100% same position and font sizes as online. If the check box is not checked it will be exported as a text

object to PowerPoint like in version 7, the backside of the text object is that the font sizes can differ compared to online and due to that be placed in wrong position.

The image below shows the new PowerPoint export option control.



2.14 NEW TABLE MODULE*

A new Table module has been implemented in Storyteller. The already existing Cross Table Tool, which was used for creating tables in version 7, is still present and both modules can now be used for creating tables in version 8. The new table module is based on the existing Charting module in Storyteller. The setup is identical to creating charts except for the layout functions.

As the new table module supports all functions that can be used in the chart setup the new module has the following advantages compared to the existing Cross Table Tool:

- Supports unlimited number of nesting levels in rows/columns
- Supports nesting in rows
- Supports grid-grouping
- Supports moving average
- Supports Index questions
- Supports automatic benchmark comparisons in Hierarchical filter projects
- Supports significance testing between rows
- Support significance testing All against all
- Supports sorting in both rows and columns

The list below shows some key functions in the Cross Table Tool which are missing in the new Table module:

- Mixed calculation like showing both Count, Mean and % in the same table
- Reference value functions
- Totals (The “Total interval to Column” function)

- Show ranking number
- Show base size
- Cell formatting
- The following numeric calculations are missing, min, max, Standard deviation and median

Below some example images are shown with a layout that has not been possible to create in the previous Cross Table Tool.

Example image 1: Nesting in rows.

		Spontaneous brand awareness - Top of mind	Spontaneous brand awareness - In mind
Dapresy Telecom	Man	33.4%	90.4%
	Woman	27.7%	89.7%
Four	Man	4.1%	51.1%
	Woman	6.3%	49.7%
Swedish Telecom	Man	7.9%	53.2%
	Woman	5.4%	47.5%

Example image 2: grid question layout

	1 Not at all likely	2	3	4	5 Very likely
Brand Consideration - Dapresy Telecom	20.5%	17.3%	19.1%	20.7%	21.5%
Brand Consideration - Four	16.8%	21.1%	18.8%	21.5%	20.6%
Brand Consideration - Swedish Telecom	20.7%	21.3%	20.1%	18.5%	19.2%
Brand Consideration - Sweet Talk	12.8%	11.4%	19.9%	21.1%	34.9%

Example image 3: significance testing in rows, all against all

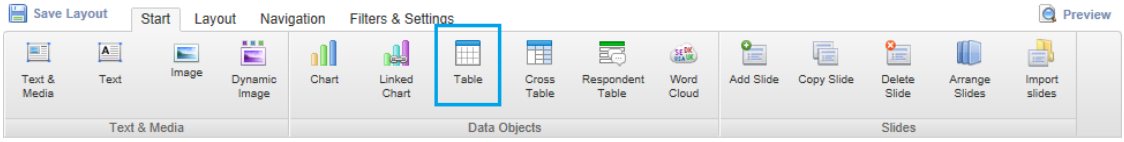
	1 Not at all likely	2	3	4	5 Very likely
(a) Brand Consideration - Dapresy Telecom	20.5% (b+,d+)	17.3% (b-,c-,d+)	19.1%	20.7%	21.5% (d-)
(b) Brand Consideration - Four	16.8% (a-,c-,d+)	21.1% (a+,d+)	18.8%	21.5%	20.6% (d-)
(c) Brand Consideration - Swedish Telecom	20.7% (b+,d+)	21.3% (a+,d+)	20.1%	18.5%	19.2% (d-)
(d) Brand Consideration - Sweet Talk	12.8% (a-,b-,c-)	11.4% (a-,b-,c-)	19.9%	21.1%	34.9% (a+,b+,c+)

In Power Point the new Table module is exported as an EMF (vector) image.

2.14.1 SETUP PROCESS

To setup the new Table module the same logic for setting up other objects is used. **The new Table module is named Table and the previous module named Table has been renamed to Cross Table.**

The image below shows where to find the new Table module.



To add content to the Table click Edit (on right click or in the object menu). The setup is done in four different tabs/steps:

1. Variables - select variables to include in the table
2. Filters - add filters to the table
3. Settings – define time period, format of the table etc
4. Layout - define color and size of text, background, grid lines etc.

VARIABLES

The Variables selection is identical as in the chart setup.

FILTERS

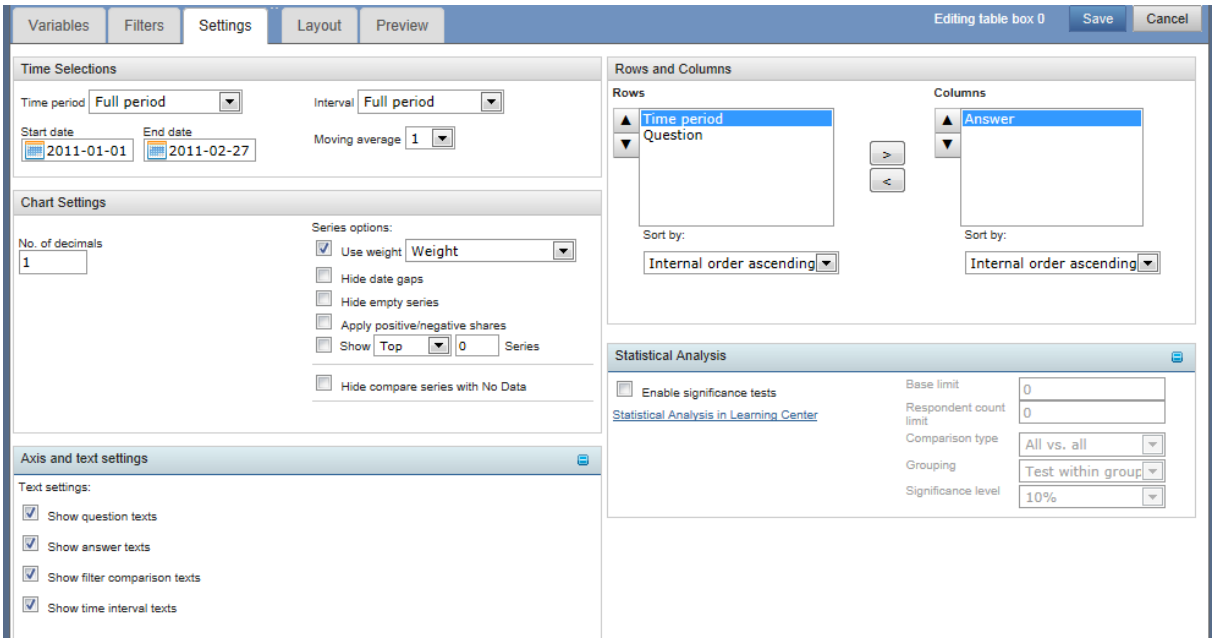
The Filters selection is identical as in the chart setup.

Settings

The Settings Tab it is slightly different as some functions that only can be used in charts have been removed like Color options of series, legend position and scale options.

The logic for selecting where to show the selected questions, answers, filters and time periods remains, but instead of the naming Legend and Axis the naming Rows and Columns are used.

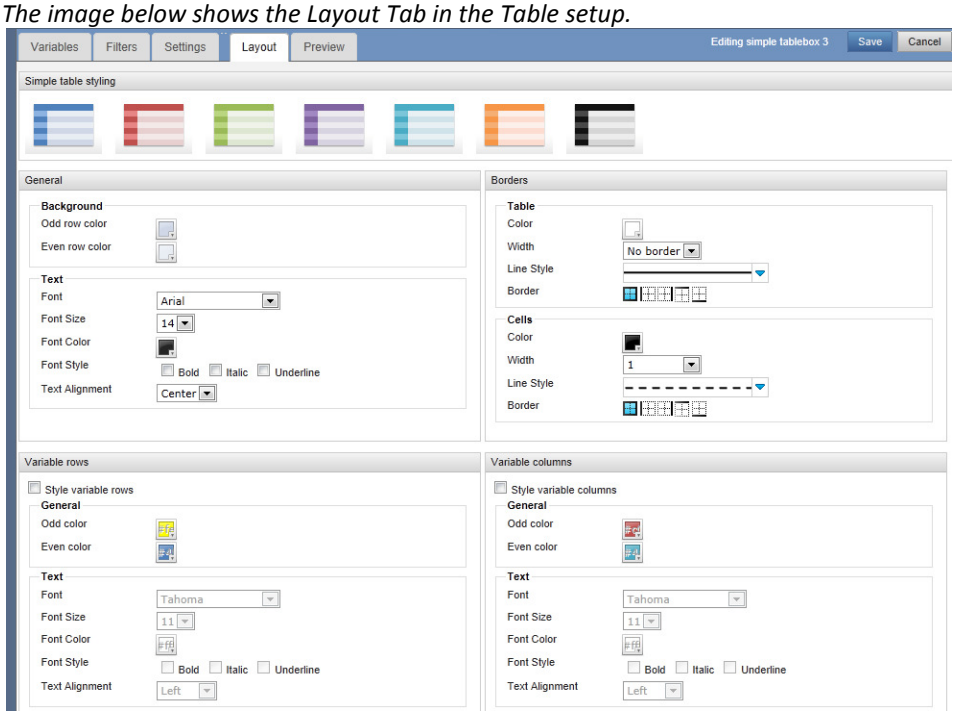
The image below shows the Settings Tab in the table setup.



LAYOUT

In the Layout Tab you can define the style of the table. In the top of the screen we have some templates. They can be used for creating nice looking tables quickly. To use a template click the template and the settings connected to the template will be applied to the controls on the Settings Tab and subsequently used in the table. You can also define settings manually.

The image below shows the Layout Tab in the Table setup.



2.15 DYNAMIC IMAGE MODULE

A new Dynamic Image module has been added which makes it possible to connect external images such as photos or concepts to variables in the questionnaire or to hierarchical units in for instance a Mystery Shopping survey. Depending on the selected filters in a Storyteller dashboard, not only the results will change but also the externally uploaded images.

The module is built for handling a process with thousands of images that automatically can be connected to different variables and time periods and to support an automated update process in ongoing projects. Due to that the process is complex. In version 9 a more simple and easy to use Dynamic image module will be implemented.

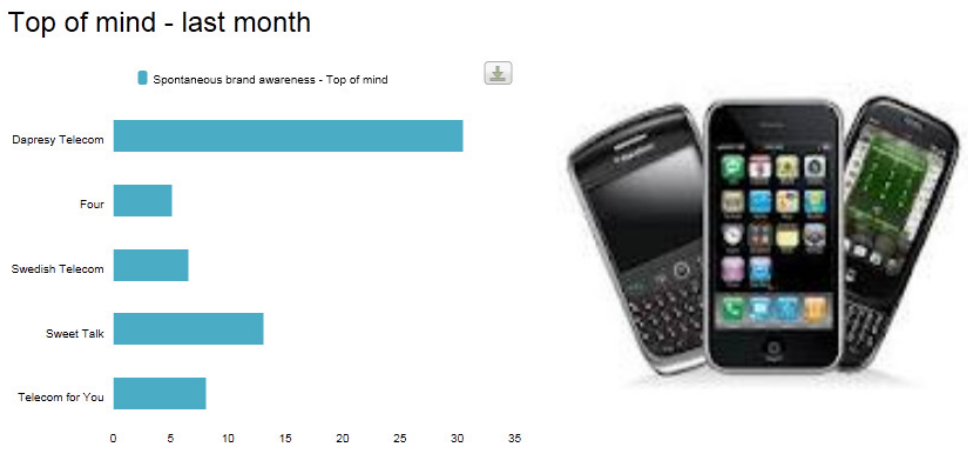
Note: due to the massive amount of files that can be uploaded to the project no back-ups are taken of the uploaded images.

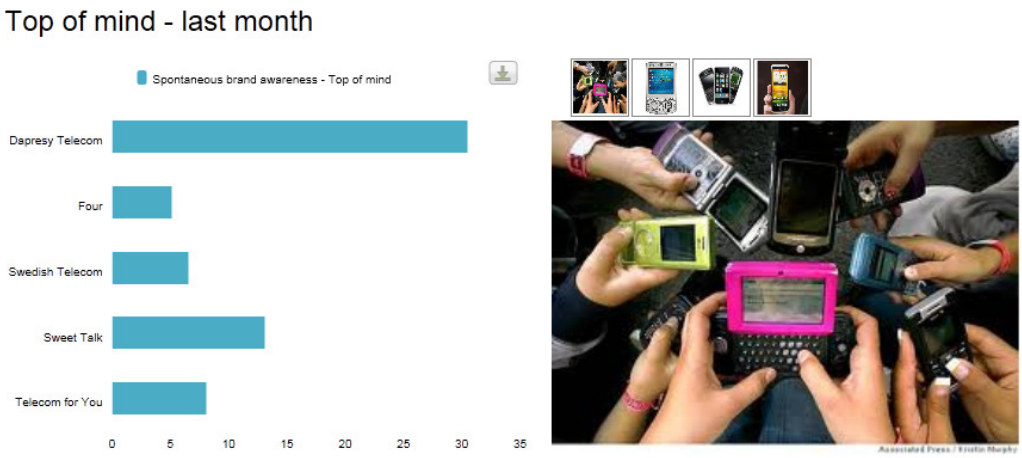
END USER VIEW

Online

In the end user view images appear depending on what date and optional filters are selected. If the selections generate more than one image a slide show module appears on the page.

In the first example image below the selections generate one image only and due to that no slide show view appears. In the bottom image a slide show appears as the selection generates more than one image.





PPT export

The behavior in the Power Point export depends on the setup of the Dynamic image object. The reason why the behavior is different is due to the slide show logic used online - slide show logic cannot be used in a PowerPoint slide.

So depending on the setup one, both or none of the options below are used in the export to Power Point;

1. a screen shot of the slide show view is inserted in the same position as shown online
2. X number of images are inserted in separate slides, one image per slide.

SETUP PROCESS

The setup consists of two main steps;

1. In an administration screen the images are uploaded and mapping rules created so images automatically can be connected to variables
2. In Storyteller the new Dynamic image object is inserted in the slide and the content is defined.

The below bullet points explain the main logic.

1. An uploaded image can be mapped against multiple variables but within each variable an image can only be mapped to one answer alternative. E.g. an image can be mapped against Sweden in the Country variable and Round 2 in the wave variable.

2. The mapping is based on the file name. The file name is matched against either the answer alternative name or the answer alternative ID in the selected variable. If a file should be mapped against multiple variables - delimiter logic is used to separate the different parts in the file name. An example of a file name can be: Sweden_Round 2_photo33.png - which makes it possible to connect the image against Sweden in the country variable and Round 2 in the wave variable.

3. Except mapping to variables each image gets a response date which is used to filter out relevant images in tracking/ongoing projects. The response date must correlate with the response date of all the respondents in the project.

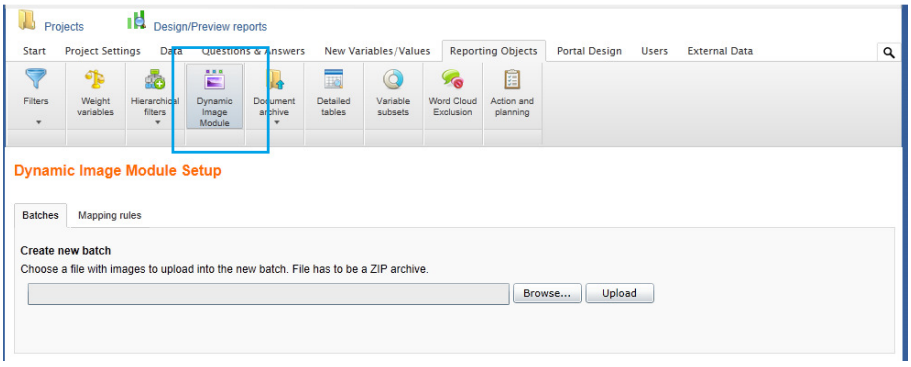
4. The response date is set on a batch level (a zipped uploaded file) which means that all images in one upload will get the same response date.

5. An uploaded image can be shown in more than one Dynamic image object in a report. E.g. if the same image should be shown in two different slides or in two different reports it only needs to be uploaded once.

2.15.1 SETUP - IMAGE UPLOAD AND CONNECTION TO FILTERS

The upload of images and the mapping to variables are done in a new screen named Dynamic image module which sits in the Reporting Objects Tab in the administration section.

The image below shows the new screen.



The new screen contains 2 sheets. One sheet for uploading batches of images (zipped format) and one sheet for creating mapping rules which connect the images to the variables.

UPLOAD SHEET

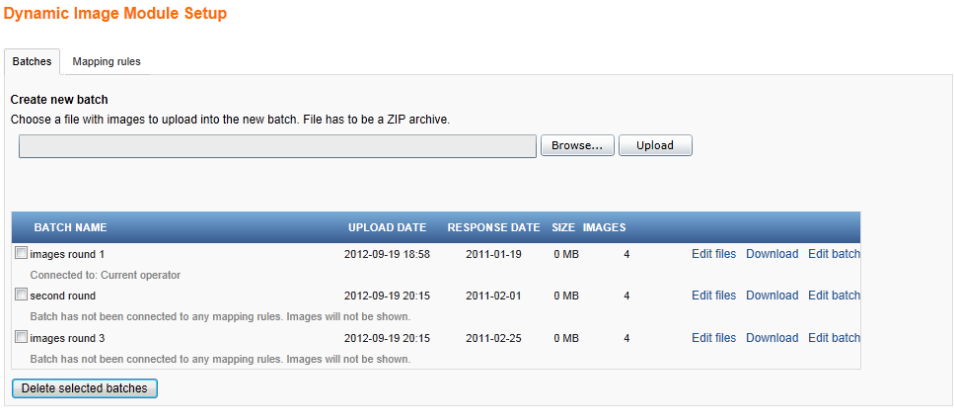
In the Upload sheet the images are uploaded. The images must be in one of the following formats and be placed in a zipped folder (the zipped folder can contain any number for sub folders);

- Png
- Jpeg
- Gif

Upload batch

To upload a file browse for the zipped folder and upload it. When the batch (the zipped folder) has been uploaded it is shown in a list of all uploaded batches. The list shows the number of files, the size and the upload date per batch.

The image below shows the list of uploaded batches.



Delete batch

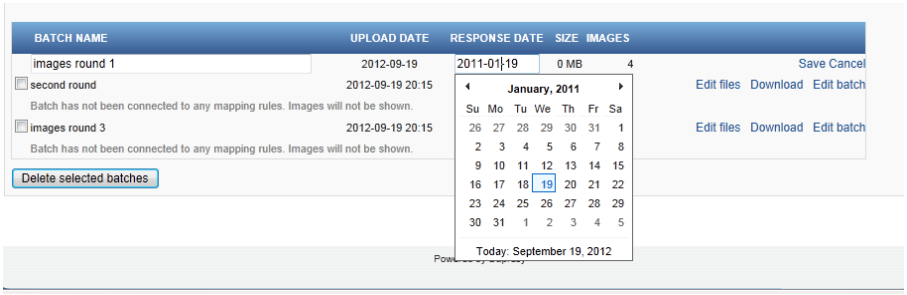
Batches that not are in use should be deleted to not take necessary server capacity. To delete a batch select it in the grid and click “Delete selected batch” below the grid.

Response date

Each image must have a response date, the response date is used for filtering out correct images in tracking projects. The response date is set on a batch level which means that all files in one batch must have the same response date.

The default response date is the upload date. The date can be changed by clicking Edit batch and then changing the response date as shown in the image below. Click Save to save the new date.

The image below shows the calendar function that can be used for changing response date.



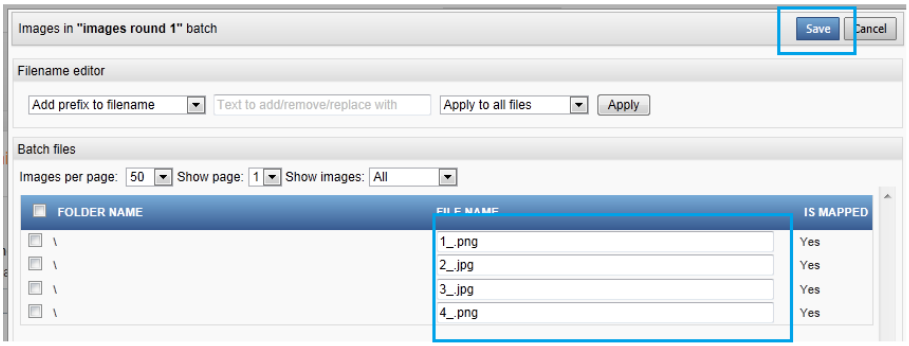
Edit file names

The names of all uploaded images can be updated in the Edit section. As the mapping against variables is done by the image name it must be correct. In the Edit mode the following can be done:

- Manual name update
- Automatic name update by using he “find and replace” function in all or selected files
- Automatically adding a prefix to all or selected files

Manual name update

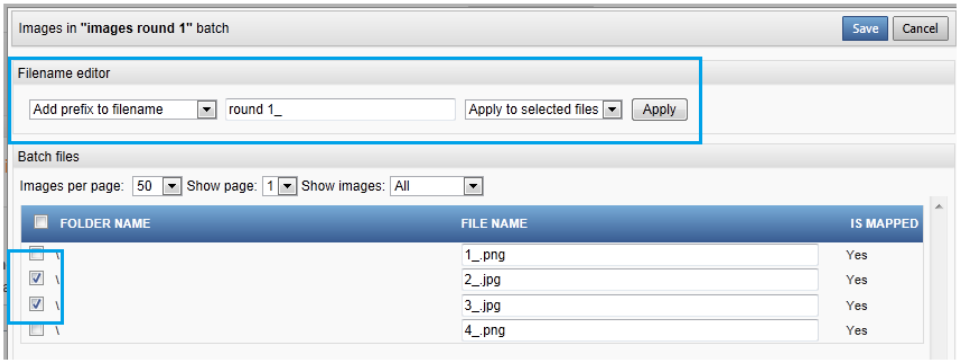
To edit the images click the Edit button shown in the image below. In the popup window all files are listed. To update a single image name simply update the file name in the text field.



Add prefix and Find and replace

In uploaded batches when for instance all the images should be connected to a specific answer alternative the name (or the ID) must be included in all the file names. Instead of doing that manually outside the system the most efficient way is to upload the batch and then insert a prefix to the image names with a few clicks.

To use the find and replace function or to add a prefix to multiple images use the options in the top of the screen. Either the changes are applied to all images or to the selected once. Select images by checking the check boxes in the most left column as shown in the image below.



MAPPING RULE SHEET

In the Mapping rules sheet the mapping between all the images and the variables are done.

The work process in the initial setup is as follows;

1. One or several mapping rules are created
2. The mapping rules are run in selected batches to connect the images to the variables
    a. If all images were not successfully mapped it is possible to review the images that were not mapped and update their file names if needed

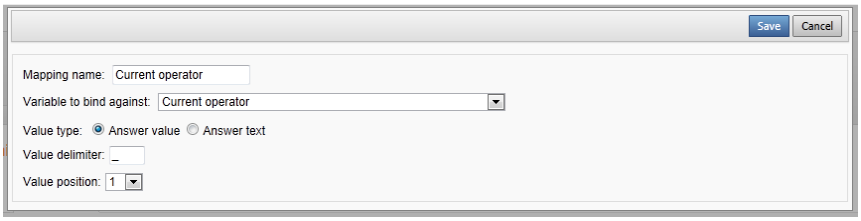
In tracking projects a mapping rule is re-used each new round so only step 2 in the process above needs to be done in an additional image upload.

Create mapping rules

To create a mapping rule click Create new rule, the button is highlighted in the image below, and a popup screen appears. In the popup screen the following steps are being performed;

1. Name the new mapping rule
2. Select which variable to connect the mapping rule to
3. Select if the mapping should be done against the Answer ID or the Answer text
4. Select the used delimiter
5. Select the position in the name where the ID/Text is found. In the example file name “Round 2_Sweden_photo10.png “ Round 2 is in position 1 and Sweden is in position 2.
6. Save the mapping rule

The image below shows the Create mapping rule window.



A mapping rule is mapping an image against one variable, if an image should be mapped to multiple variables multiple mapping rules needs to be created.

Delete mapping rule

Non used mapping rules should be deleted. To delete a mapping rule select the one (or several) to delete by checking the check boxes in each row and click.

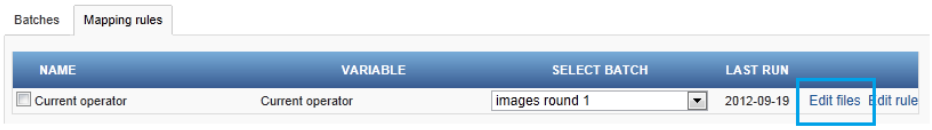
Map/connect images – Run mapping rules

To run a mapping rule do as follows:

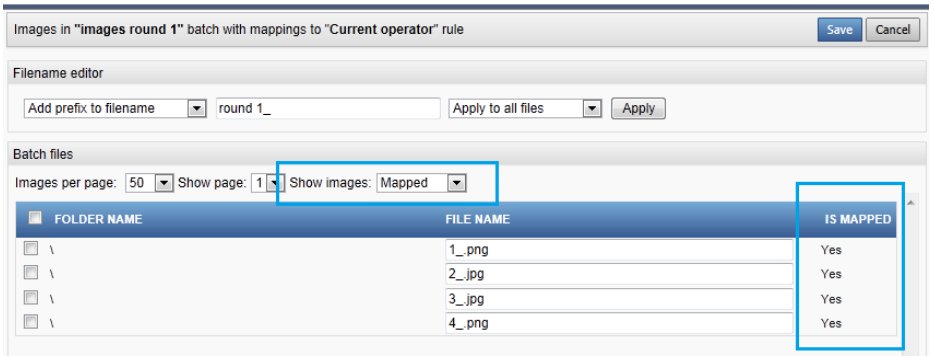
1. Select one or several mapping rules to run
2. For each rule select which batch it should be run in
3. Click Run selected rules
4. A successful message is shown on the screen. If all images in the batch were not successfully mapped it is mentioned in the error message.

It is possible to review which images were mapped and not mapped by clicking Edit files. In the popup window the most right column indicates if an image has been mapped or not. The filter selection box can be used to only show unmapped images.

The image below shows Edit files button.



The image below shows the mapped/unmapped information.



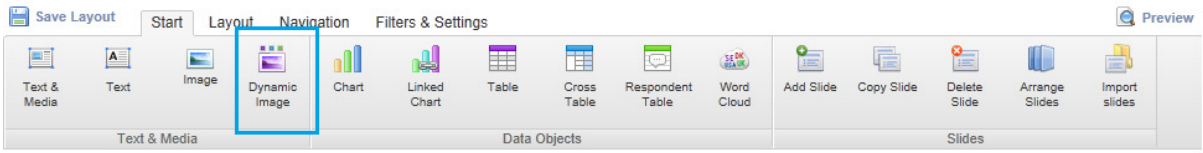
Disconnect selected mapping rules

If a mapping rule for instance were run in the wrong image batch the image mapping can be disconnected. To disconnect a mapping select the mapping rule and the batch to disconnect and click Disconnect selected rule.

2.15.2 SETUP – STORYTELLER SETUP

To setup a Dynamic Image module the same logic for setting up other object boxes is used when it comes inserting it in the slide, move it around etc. The new object is found in the Start menu as shown in the image below.

The image below shows where to find the new Dynamic Image object



To add content to the Dynamic Image object click Edit (on right click or in the object menu). The setup is done in four different tabs/steps;

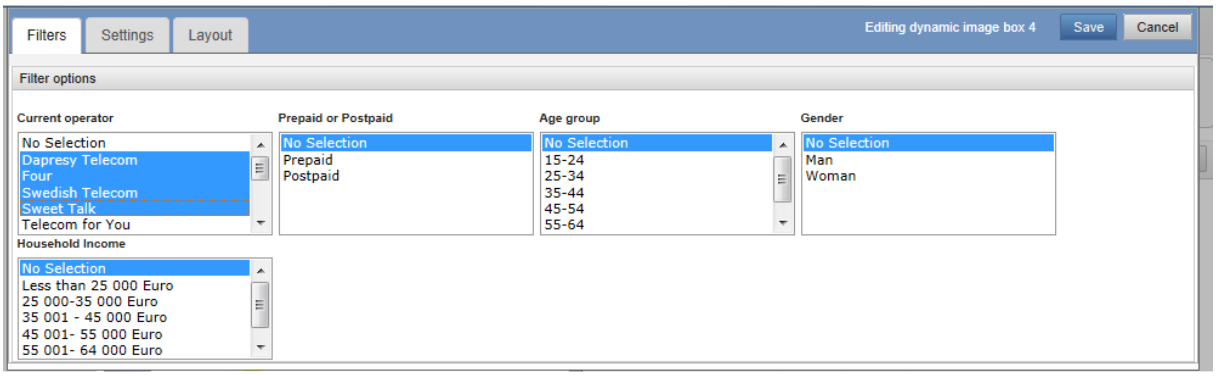
1. Filters - select filtering so correct images is shown for the Report users
2. Settings – define time period, behavior in H-Filter projects and in Power Point exports.

FILTER TAB

In this Tab the filters are defined to get the desired image shown. The filter logic for showing an image is based on the following two rules;

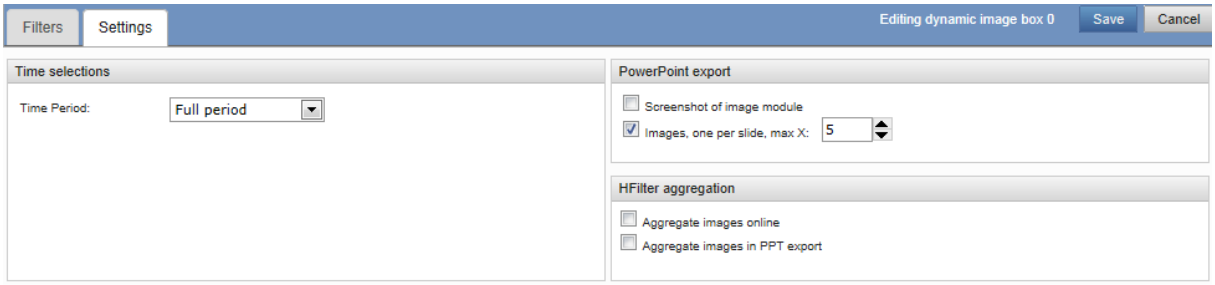
- An image will only be shown if the variable the image is mapped against is used as a filter. The filter can either be an Optional Filter or a defined Filter in the Dynamic image setup. (see image further down)
- An Optional filter variable is only applied to the image if the image has been mapped to the same variable, if not that filter will be ignored.
- All filter selections in the Dynamic image setup is always applied to the images.

The image below shows the filter selection in the Dynamic image setup. Only images that fulfill the selected filters will be shown. If Optional filters are used they will also be applied to the images if the image batch has been mapped against that variable.



Settings Tab
In the Settings Tab the time period selections, PowerPoint export behavior and the aggregation behavior in Hierarchical projects are defined. The hierarchical filter option only appears when a Hierarchical filter is present in the project.

The image below shows the Settings Tab.



Time-period selection.
Select either a static date or a floating date. Only images with a response date that match the time period selection will be shown in the report.

PowerPoint export
In the PowerPoint export section the export behavior is defined as the slide-show logic used online cannot be transferred to the PowerPoint document.

Both or none of the options below can be used in the export to Power Point;

1. a screen shoot of the slide show view is inserted in the same position as shown online
2. X numbers of images are inserted in separate slides, one image per slide. Maximum 10 images/slides can be exported.

In step 2 above - the export is limited to maximum 10 slides due to the performance, a Power Point document with hundreds of slides will be huge to download and hard to open if it contains a lot of images.

H-Filter aggregation
In this section the behavior in H-Filter projects is defined. One option is used for the online visualization and one for the PowerPoint exports.

The option “Aggregate images online” means that images connected to child units will be shown when selecting a parent unit. E.g. if the H-Filter structure looks like below all images connected to both Sweden, Stockholm and Gothenburg will be shown when Sweden is selected. If the option is not checked only images connected to Sweden will be shown when Sweden is selected.

- Europe

- Germany
- UK
- Sweden
  - Stockholm
  - Gothenburg

The option “Aggregate images in PPT export” is identical but it regards the PowerPoint export.

2.16 RESPONDENT TABLES MODULE - OPEN ANSWER REPORTING

A new reporting module has been added to Storyteller for reporting data at a respondent level. This feature can be used for showing open ended comments in any project type or for showing complete responses in for instance a Mystery Shopping survey.

The layout and content of the reporting is very flexible. Below a few example images are shown.

Image 1 – Shows a Column based example, variables in columns and respondent in rows.

Current operator	Prepaid or Postpaid	Age group	Gender	Household Income	Spontaneous brand awareness - Top of mind	Spontaneous brand awareness - In mind
WTC	Prepaid	45-54	Woman	25 000-35 000 Euro	Don't know	Dapresy Telecom, Telecom for You, DonkyCom, WTC
Dapresy Telecom	Prepaid	55-64	Man	25 000-35 000 Euro	Sweet Talk	Dapresy Telecom, Four, Tel Me More, WTC, Donut Call
Sweet Talk	Postpaid	15-24	Woman	35 001 - 45 000 Euro	Four	Dapresy Telecom, Four, Swedish Telecom, Sweet Talk, Telecom for You, Duty Calls, WTC
DonkyCom	Prepaid	45-54	Woman	45 001- 55 000 Euro	Four	Telecom for You, Duty Calls, Tel Me More, DonkyCom, Don't know
Other	Prepaid	45-54	Man	55 001- 64 000 Euro	Sweet Talk	Telecom for You, Duty Calls, Tel Me More, DonkyCom, WTC
Dapresy Telecom	Prepaid	55-64	Man	35 001 - 45 000 Euro	Telecom for You	Dapresy Telecom, Four, Sweet Talk, Telecom for You, Tel Me More, DonkyCom, WTC
Dapresy Telecom	Prepaid	65 +	Woman	35 001 - 45 000 Euro	Duty Calls	Dapresy Telecom, Four, Swedish Telecom, Sweet Talk, Telecom for You, Tel Me More, DonkyCom, WTC
Dapresy Telecom	Prepaid	45-54	Woman	35 001 - 45 000 Euro	Sweet Talk	Four, Tel Me More, DonkyCom, WTC, Other
Dapresy Telecom	Prepaid	15-24	Man	55 001- 64 000 Euro	Swedish Telecom	Dapresy Telecom, Four, Swedish Telecom, Sweet Talk, Telecom for You, Duty Calls, DonkyCom, WTC
Dapresy Telecom	Prepaid	35-44	Woman	55 001- 64 000 Euro	Four	Dapresy Telecom, Swedish Telecom, Telecom for You, Duty Calls, Tel Me More, DonkyCom, WTC, Donut Call

Image 2 – Shows a Row based example, Respondents in columns and variables in rows.

Date	2011-01	2011-01	2011-01	2011-01	2011-01	2011-01
Respondent ID	2	4	5	6	7	9
Current operator	WTC	Dapresy Telecom	Sweet Talk	DonkyCom	Other	Dapresy Telecom
Prepaid or Postpaid	Prepaid	Prepaid	Postpaid	Prepaid	Prepaid	Prepaid
Age group	45-54	55-64	15-24	45-54	45-54	55-64
Gender	Woman	Man	Woman	Woman	Man	Man
Household Income	25 000-35 000 Euro	25 000-35 000 Euro	35 001 - 45 000 Euro	45 001- 55 000 Euro	55 001- 64 000 Euro	35 001 - 45 000 Euro
Spontaneous brand awareness - Top of mind	Don't know	Sweet Talk	Four	Four	Sweet Talk	Telecom for You
Spontaneous brand awareness - In mind	Dapresy Telecom, Telecom for You, DonkyCom, WTC	Dapresy Telecom, Four, Tel Me More, WTC, Donut Call	Dapresy Telecom, Four, Swedish Telecom, Sweet Talk, Telecom for You, Duty Calls, WTC	Telecom for You, Duty Calls, Tel Me More, DonkyCom, Don't know	Telecom for You, Duty Calls, Tel Me More, DonkyCom, WTC	Dapresy Telecom, Four, Sweet Talk, Telecom for You, Tel Me More, DonkyCom, WTC

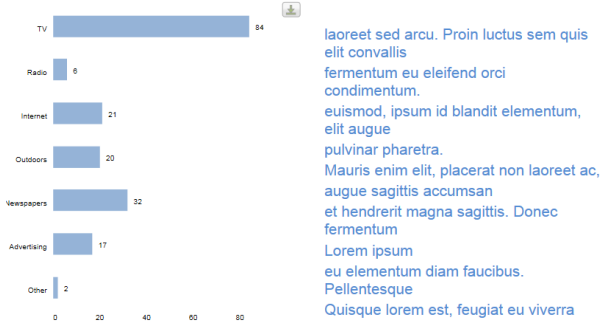
Image 3 - Shows a Row based example, Respondents in blocks and variables in rows.

Date	2011-01-01
Respondent ID	2
Current operator	WTC
Prepaid or Postpaid	Prepaid
Age group	45-54
Gender	Woman
Household Income	25 000-35 000 Euro
Spontaneous brand awareness - Top of mind	Don't know
Spontaneous brand awareness - In mind	Dapresy Telecom, Telecom for You, DonkyCom, WTC

Date	2011-01-01
Respondent ID	4
Current operator	Dapresy Telecom
Prepaid or Postpaid	Prepaid
Age group	55-64
Gender	Man
Household Income	25 000-35 000 Euro
Spontaneous brand awareness - Top of mind	Sweet Talk
Spontaneous brand awareness - In mind	Dapresy Telecom, Four, Tel Me More, WTC, Donut Call

Date	2011-01-01
Respondent ID	5
Current operator	Sweet Talk
Prepaid or Postpaid	Postpaid
Age group	15-24
Gender	Woman
Household Income	35 001 - 45 000 Euro
Spontaneous brand	

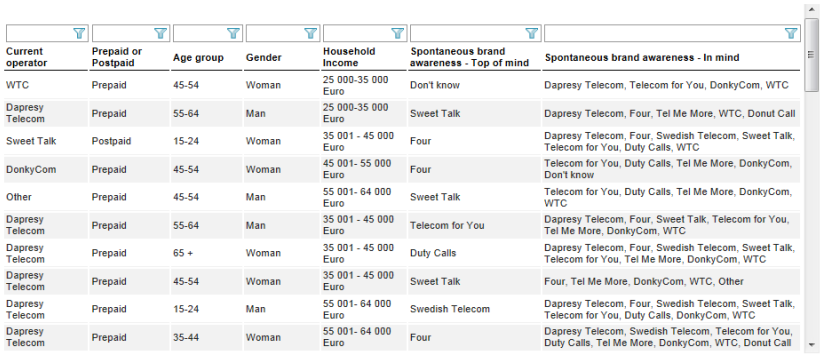
Image 4 - Shows a clean table without borders, search fields etc. Can for instance be used to show open ended.



2.16.1 END-USER VIEW

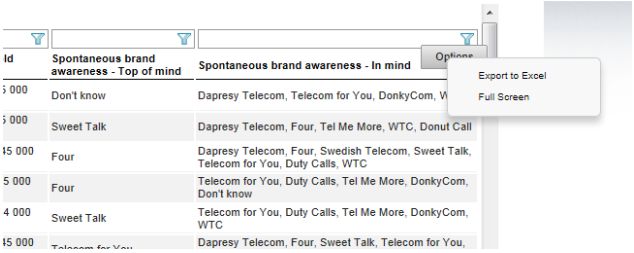
Navigation

In the end-user view the new respondent tables looks like in the example images above. If the table is bigger than the size of the used object box a scroll bar appears, also paging is used for better performance.



Current operator	Prepaid or Postpaid	Age group	Gender	Household Income	Spontaneous brand awareness - Top of mind	Spontaneous brand awareness - In mind
WTC	Prepaid	45-54	Woman	25 000-35 000 Euro	Don't know	Dapresy Telecom, Telecom for You, DonkyCom, WTC
Dapresy Telecom	Prepaid	55-64	Man	25 000-35 000 Euro	Sweet Talk	Dapresy Telecom, Four, Tel Me More, WTC, Donut Call
Sweet Talk	Postpaid	15-24	Woman	35 001 - 45 000 Euro	Four	Dapresy Telecom, Four, Swedish Telecom, Sweet Talk, Telecom for You, Duty Calls, WTC
DonkyCom	Prepaid	45-54	Woman	45 001- 55 000 Euro	Four	Telecom for You, Duty Calls, Tel Me More, DonkyCom, Don't know
Other	Prepaid	45-54	Man	55 001- 64 000 Euro	Sweet Talk	Telecom for You, Duty Calls, Tel Me More, DonkyCom, WTC
Dapresy Telecom	Prepaid	55-64	Man	35 001 - 45 000 Euro	Telecom for You	Dapresy Telecom, Four, Sweet Talk, Telecom for You, Tel Me More, DonkyCom, WTC
Dapresy Telecom	Prepaid	65 +	Woman	35 001 - 45 000 Euro	Duty Calls	Dapresy Telecom, Four, Swedish Telecom, Sweet Talk, Telecom for You, Tel Me More, DonkyCom, WTC
Dapresy Telecom	Prepaid	45-54	Woman	35 001 - 45 000 Euro	Sweet Talk	Four, Tel Me More, DonkyCom, WTC, Other
Dapresy Telecom	Prepaid	15-24	Man	55 001- 64 000 Euro	Swedish Telecom	Dapresy Telecom, Four, Swedish Telecom, Sweet Talk, Telecom for You, Duty Calls, DonkyCom, WTC
Dapresy Telecom	Prepaid	35-44	Woman	55 001- 64 000 Euro	Four	Dapresy Telecom, Swedish Telecom, Telecom for You, Duty Calls, Tel Me More, DonkyCom, WTC, Donut Call

It is possible to view the table in Full screen, to do that move the mouse over the table and click “View in Full screen”.



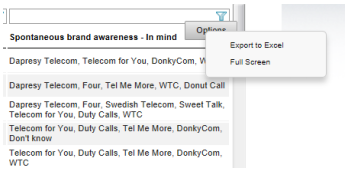
Search and Sort

If the Search feature has been enabled in the table it is possible to search/filter the data in each column. Simply enter a search criterion and click Enter or click the Funnel icon.

To sort he columns ascending/descending you can click the column headers. First click sort ascending, second descending and the third gives the default sort order.

Export

The tables are included in the PowerPoint export as images (not real tables) and can also be exported to Excel. To export a table to Excel hover the mouse over the table and click the Export button.



Note: In PowerPoint export the logic “what you see is what you get” (WYSIWYG) is applied. So if the table is much bigger than the object box which adds paging and scrollbars to the table, only the default view will be included as a screen-shot if the table is inserted in a PowerPoint export.

Optional Filters

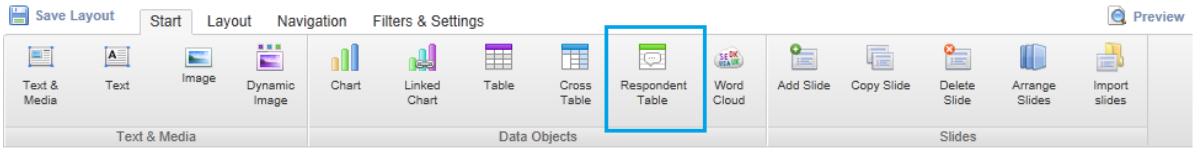
If Optional filters are active the following affects the Respondent Table;

- Hierarchical Filters
- Filters
- Time period
- Variable subset

2.16.2 SETUP PROCESS OF RESPONDENT TABLE

To setup a Respondent Table the same logic for setting up other object boxes is used. The new Respondent Table is found in the Start menu as shown in the image below.

The image below shows where to find the new Respondent Table.

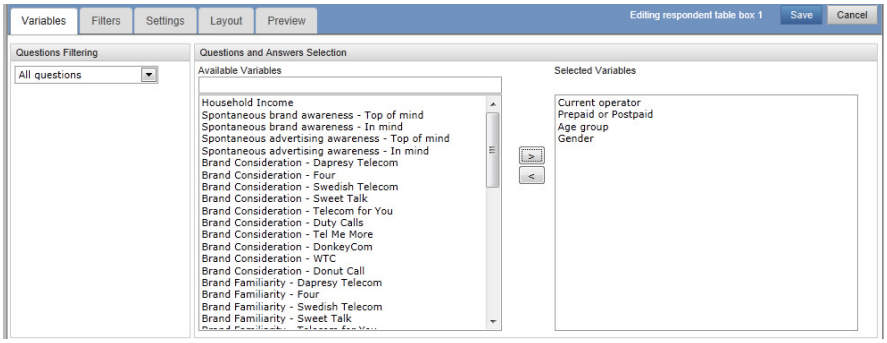


To add content to the Respondent Table click Edit (on right click or in the object menu). The setup is done in four different tabs/steps:

1. Variables - select variables to include in the table
2. Filters - add filters to the table
3. Settings – define time period, format of the table etc
4. Layout - define color and size of text, background, grid lines etc.

VARIABLES

In the first Tab the variables are selected. The desired variables are selected in the selection boxes as shown in the image below.

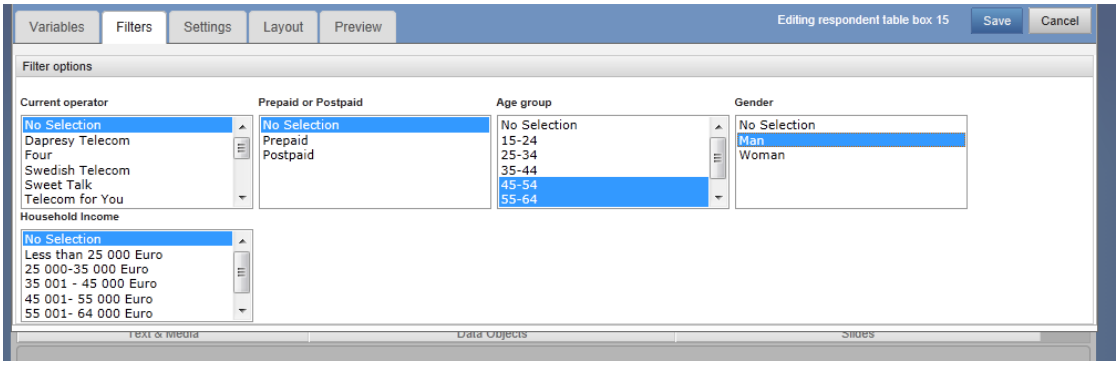


In the top left corner (see the image above) a variable type filter is present to make it easier to find the variables: in the default view all variables are shown. In the bottom of the default list the Respondent ID and Respondent Date variables are shown as well.

FILTERS

You can select filters to apply to the Respondent Table. Selections can be done in several filter boxes at the same time and like in the chart setup - 'AND' is used between the boxes. So in the example below only old male respondents will be shown in the result table.

The image below shows the Filter Tab in the setup of a Respondent Table.



SETTINGS

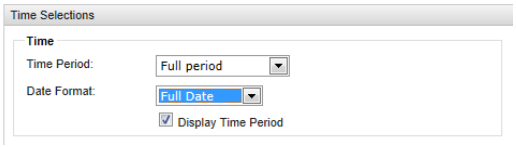
The Settings Tab consist of several options which are described below.

Time selections

Select the time period to show respondents from (Start and stop date) and the displayed format. The selected Time period will be shown above the Respondent Table as shown in the second image below if the "Display Time Period" option is checked.

The selected Date format will be used above the table and in the Respondent Table itself if it contains the "Respondent date" variable.

The image below shows the Time selection controls in the Settings Tab.



The image below shows a Respondent Table with a shown Time period above the table.

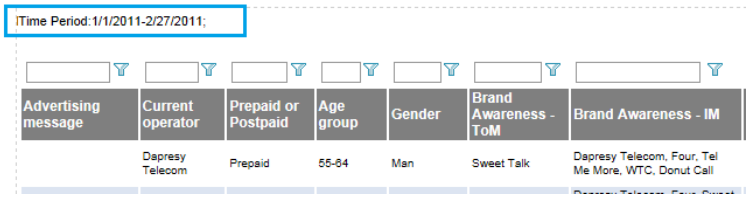


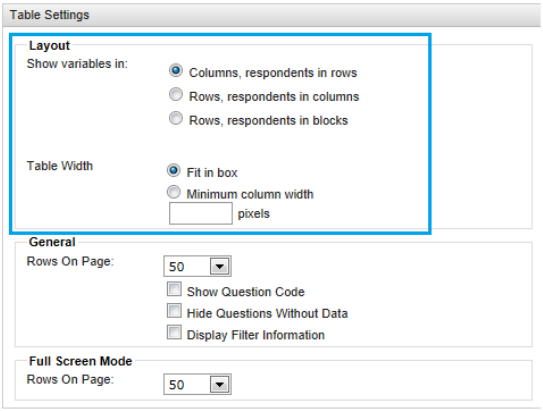
Table settings – Layout

In the Table settings Layout section the disposition of the table is selected.

In the section “Show variables in” - you define if variables should be shown in columns or in rows, please see the example images of the different tables further up in this document.

Note: The option “Rows, respondents in columns” is limited to 50 respondents. If you have more than 50 respondents they will not be shown. This is due to performance and this option should only be used in for instance Mystery shopping surveys where you show one column per wave.

The image below shows the layout settings in the Settings Tab.



In the Table Width section you define the width of the columns. The default setting is “Fit in box” which means that the table will fill the whole object box and use its full size.

If using the Minimum Column width option you define the minimum number of pixels of the columns. This means that the table can be much wider than the object box and in that case horizontal scrollbars will appear inside the table.

Note: Scroll bars are not shown in the setup-mode. They are only shown in end-user mode. This is because it must be possible to move around the object box on the slide, if scrollbars are present it usually scrolls instead of moving position.

Note 2: A column can never be less wide than the longest word in the column as row breaks never are done in the middle of a word. So a horizontal scroll bar can appear even when the option Fit in box is used.

Table settings – General

In the General section some minor settings are done.

Rows on page; define the number of rows that should be shown in each page in the result table. If all rows do not fit in one page paging appears.

Show Question Codes; Instead of showing the question text as headers the question code is shown.

Hide questions without data; if this option is selected questions without data will be hidden and not shown in the table even if they are included in the setup.

The image below shows the General settings in the Settings Tab.

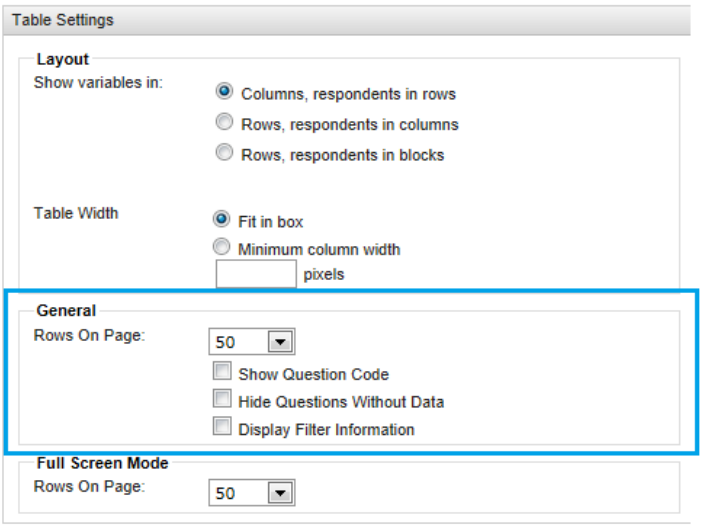
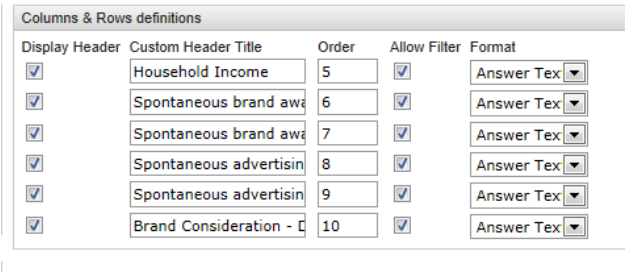


Table settings – Full Screen Mode
Define the number of rows to be shown per page when the table is shown in Full screen.

Column and Row definitions - Variables shown in Columns
The settings shown in the Column and Rows definition area depend on if variables are shown in Columns or in Rows. If the variables are shown in Columns the settings look like in the image below.

The image below present the settings when the option Variables in Columns, respondents in rows is selected.



Display Header; Uncheck this option if no header should be shown above the column in the table.

Custom Header Title; As a default the Question text or the Question Code is shown as header title, if Question texts is shown they can be edited in those fields.

Order; Define the sort order of the questions in the result table.Lowest sort order are shown to the most left (or in top of the table if questions are shown in rows).

Allow Filter: If this option is checked a filter/search field will be shown above the column. If the option is not checked not filter/search field will appear.

Format; for each numeric question the number of decimals to be shown can be selected in the Format column. For each categorical question you can define to show either the answer alternative text or the Answer Code.

Column and Row definitions - Variables shown in Rows

The settings in the Column and Rows definition depend on whether variables are shown in Columns or in Rows. If the variables are shown in Rows the settings look like the image below.

The image below shows the settings that are available when the option variables *'in Rows, respondents in Block/Columns' is selected.*

As shown in the image above only one option is present. Enable or Disable the search/filter box shown above the tables.

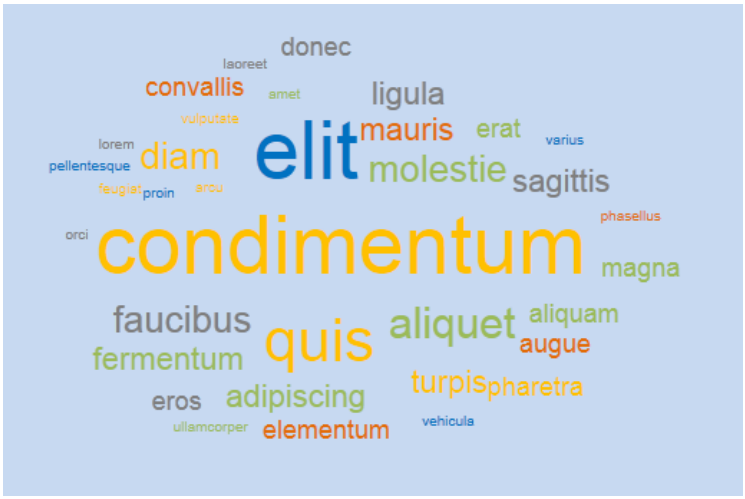
The image below shows the search/filter box which can be disabled and not shown.

BgCurrentOp	Sweet Talk
BgSubscrType	Postpaid
BgAgegroup	15-24
BgGender	Woman
BgCurrentOp	Dapresy Telecom
BgSubscrType	Prepaid
BgAgegroup	15-24
BgGender	Man

2.17 WORD CLOUD MODULE*

Support for Word clouds has been added to Storyteller. The Word clouds objects are based on a new module and have a more flexible layout compared to the existing Word cloud in the older Open ended report. The size and the colors of the cloud can easily be defined during the setup and the cloud also supports optional filters which makes it dynamic.

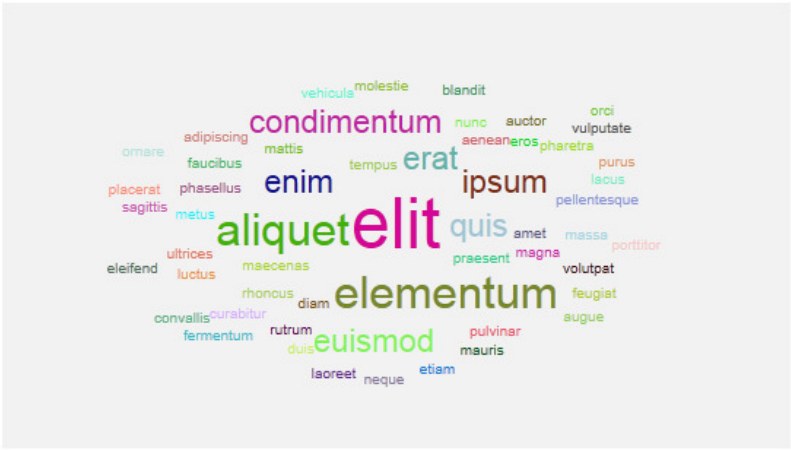
The image below shows an example of a Word Cloud created in Storyteller.



END-USER VIEW

The Word cloud supports all the optional filtering selections so changes in those give an updated Word cloud based on those selections.

The image below shows the optional selections that affect the shown Word cloud.

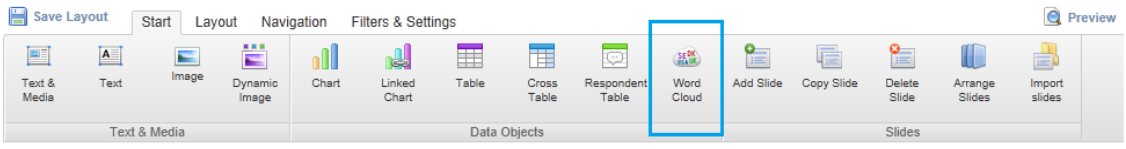


When exporting a report containing a Word cloud to Power Point the cloud will be exported as an image.

SETUP PROCESS

To setup a Word cloud the same logic for setting up other object boxes is used. The new Word cloud is found in the Start menu as shown in the image below.

The image below shows where to find the new Word cloud.



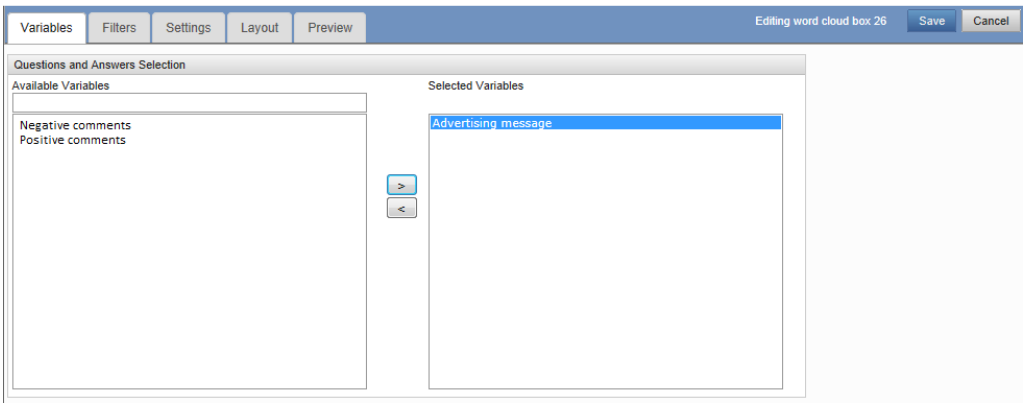
To add content to the Word cloud click Edit (on right click or in the object menu). The setup is done in four different tabs/steps;

1. Variables - select Open ended variables to base the Word cloud on
2. Filters - select filtering,
3. Settings – define time period, number of words in the cloud, minimum number of characters in the included words, show count or not

4. Layout – define background colour, text font, text colour, text sizes

VARIABLES

In the Variable Tab the Open ended comment(s) are used as a base for the Word Cloud. Select one or multiple variables, only Open ended variables (string variables) can be used.



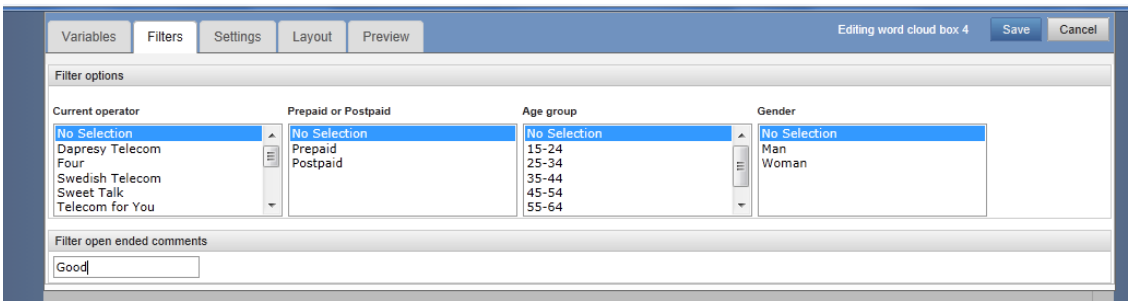
FILTERS

In this Tab the filters to apply to the Word Cloud are selected. The filters can be based on categorical variables or a text filter which will be applied to the selected open ended comments (see explanation further down).

Categorical filter variables are selected in the selection boxes in the same way as when for instance creating a chart.

To filter the open ended comments by a specific word or phrase use the Filter box shown in the image further down. If for instance “good” is entered in the filter field only open ended comments containing the word “good” will be used as a base for the Word Cloud. When entering multiple words like “very good” those words must be present in exactly the same order in the comments to be included as the base in the Word Cloud.

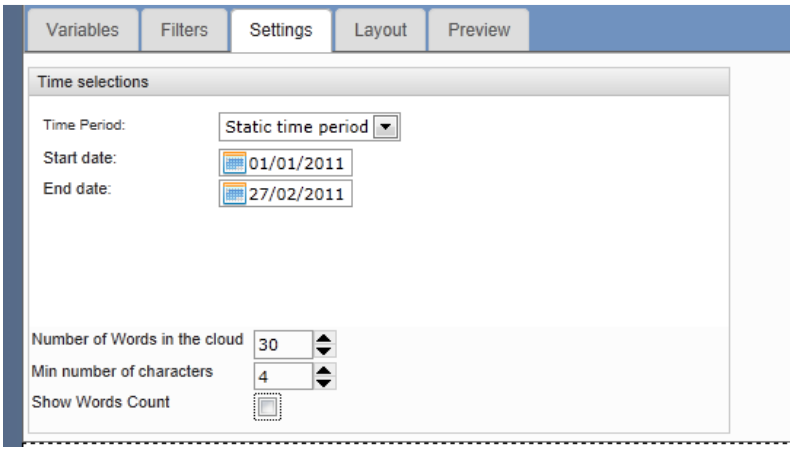
The image below shows the Filter Tab.



SETTINGS

In the Settings Tab - the date selections and result related settings are defined.

The image below shows the Settings Tab in the Word cloud setup.



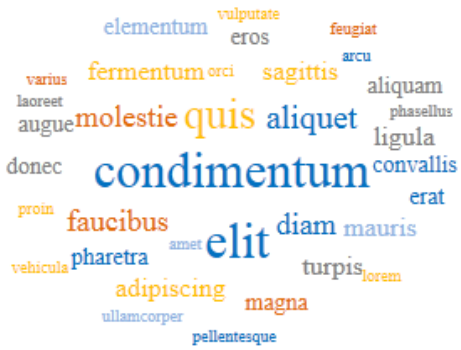
The date selection works as in all other report objects, select either a fixed date or a floating time period.

In the selection box with “Number of words in the cloud” - you select how many words should be shown in the Cloud - any value between 1 and 99 is valid.

In the selection box “Min number of characters” - you define the minimum number of characters that should be of the word to be counted as a *valid* word. If the value is set to 4 all words with 3 characters or less will be treated as non-valid words and will *not* be shown in the cloud.

If the setting “Show word count” is active the count will be shown in brackets after each word like in the example image below.

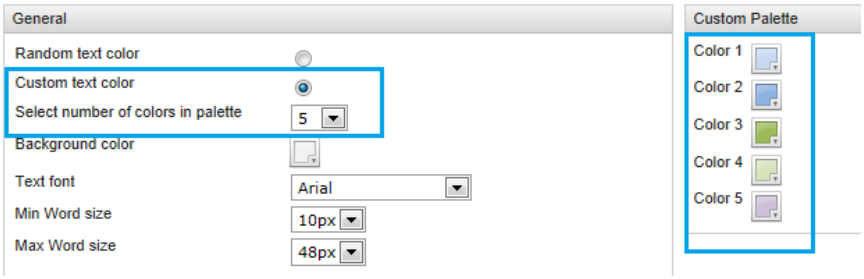
The left image below shows a cloud with the “Show word count” setting active and the right image shows the same cloud but without the setting activated.



LAYOUT

In the Layout Tab - the style of the Word cloud can be defined. In the top of the screen we have some templates. They can be used for creating nice looking clouds quickly. To use a template click the template and the settings connected to the template will be applied to the controls on the Setting Tab and subsequently used in the Word cloud. You can also define settings manually.

The color of the words can either come from a random color palette which is the default option or be based on a custom color palette. To use a custom color palette select the option ”Custom text color” and define the number of colors to include in the palette and then define each of the colors.



The background color can be defined as well, the default color is white.

The size of the smallest and the biggest words is 10 and 48 as default values but can be changed to any value between 10 and 80.

2.18 MULTIPLE WEIGHTING IN STORYTELLER

Multiple weighting is now supported in Storyteller. Any numeric variable in your project can be used as a weight variable. When creating a chart you simply select which variable to use as the weight variable so in a report different charts can use different weights. Multiple weighting is supported in the charts and tables in Storyteller.

2.18.1 SETUP PROCESS

The setup consists of two steps;

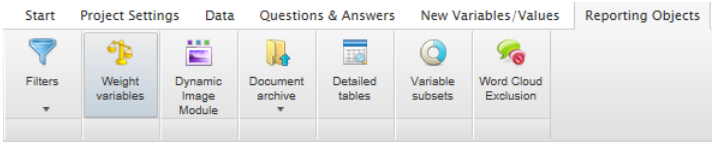
1. Define which variables to use as Weight variables. This is done in a new screen in the administration section named Weight.

2. Select which weight variable (or un-weighted) to use during the chart setup

2.18.2 SCREEN FOR DEFINING WEIGHT VARIABLE

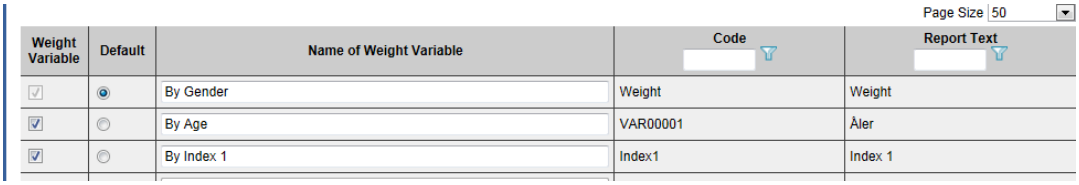
In this new screen named Weight, the variables to use as weight variables are defined. The new screen is placed beside Filters as shown in the image below.

The image below shows where to find the new screen in the administration navigation.



In the screen all **numeric** variables are listed in a grid. Simply check the once to use as possible Weight variables in Storyteller. In the Default column the default one is pointed out. The name of the Weight variable can be updated in the third column. This is the name that will be shown during the chart setup.

The image below shows the new Weight screen.



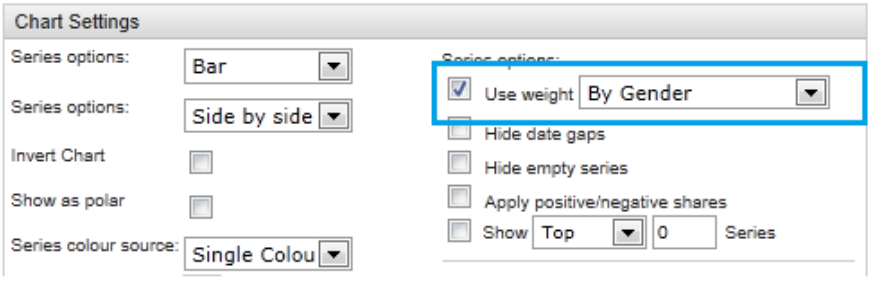
As default the imported Weight variable is checked and used. So in a project where only that variable should be used as weight variable the administrator does not need to do anything.

Note: If a respondent doesn't have a Weight number in a variable the weight 1.0 will be applied to that respondent during the calculations.

2.18.3 WEIGHT DEFINITION IN CHART SETUP

When creating a chart you simply select which weight variable to use, the selection is done in a list as shown below in the Settings Tab in the chart setup. If un-weighted values should be used that is done thru un-checking the "Use Weight" check box.

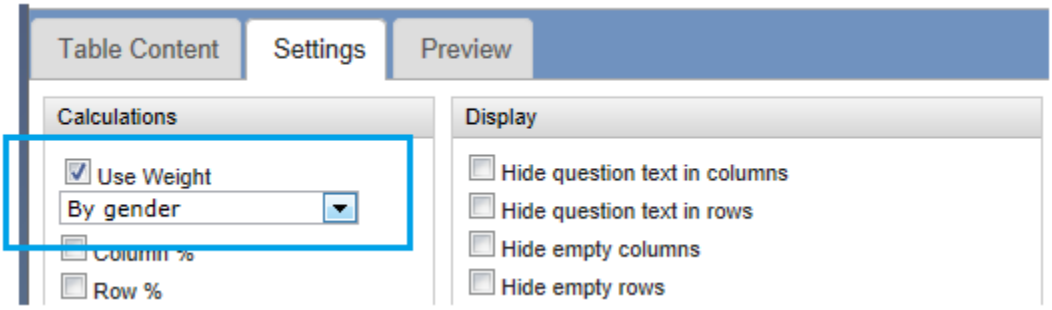
The image below shows where to find the new setting.



2.18.4 WEIGHT DEFINITION IN CROSS TABLE SETUP*

When creating a cross table you simply select which weight variable to use, the selection is done in a selection list in the Settings Tab as shown below. If unweighted values should be used - uncheck the "Use Weight" check box.

The image below shows the new settings.



2.19 LINKING BETWEEN SLIDES**

A new function makes it possible to place links in Storyteller slides which go to another slide in the same or another report in the current project. The main purposes of this new function are the following two:

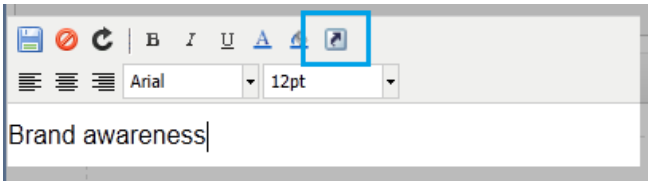
1. It gives a possibility to create user friendlier reports, for instance the end user can find the information he/she is looking for easier if a table of content has been added to the report by using the new link function
2. Links can be used for a “drill down” purpose, for instance a link that goes to a detailed result slide can be placed below a chart in an overview slide.

2.19.1 SETUP PROCESS

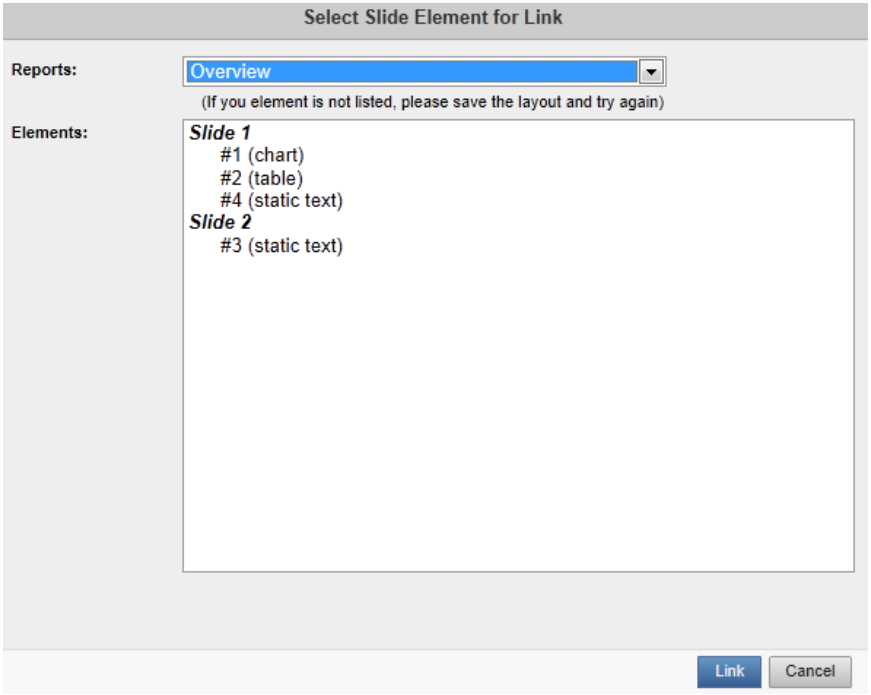
The existing Text object is used to create the links. The target of a link can be any object type in the Storyteller reports. This means that a link goes to a specific object and not to a specific slide number. This logic allows changes in the report like inserting new slides and re-arranging the report without breaking the existing links. A link will only be broken if the target object is deleted.

To create a link - enter the Edit mode of the Text object and use the new option named Create Slide Element Link. When clicking the button a popup window appears and in the popup window the target of the links is defined. In the window the target Report and the target object type needs to be defined as shown in the second image below.

The image below shows the new option Create Slide Element Link.



The image below shows the popup window for defining the target of the link. The Id number shown in front of each object is the ID number of each object box.



Note: If a Text object defined as a link is copied the Link definition will be copied as well. The same logic is valid if a slide is copied or imported to another report.

Tip: If you want to make a link of an image you can place a Text object above the image without any defined text in it. When the end user clicks the image they are clicking the “invisible” text object which is a link!

3 STORYTELLER SETUP AND USABILITY IMPROVEMENTS

Chapter 3 describes new features and improvements in Storyteller setup. The following features are included.

- Minor usability updates in Storyteller
- Gridlines support in setup view
- Import/Copy slides
- New image object
- Enhancements in the Text object
- Improved navigation

3.1 USABILITY UPDATES IN STORYTELLER

Several minor enhancements have been done for a better user experience and a faster setup of reports, below the three most important improvements are listed.

1. The chart does not disappear from the object box when moving or resizing the object. This means that you don’t need to click “Update” in the same pace as before during a report setup.

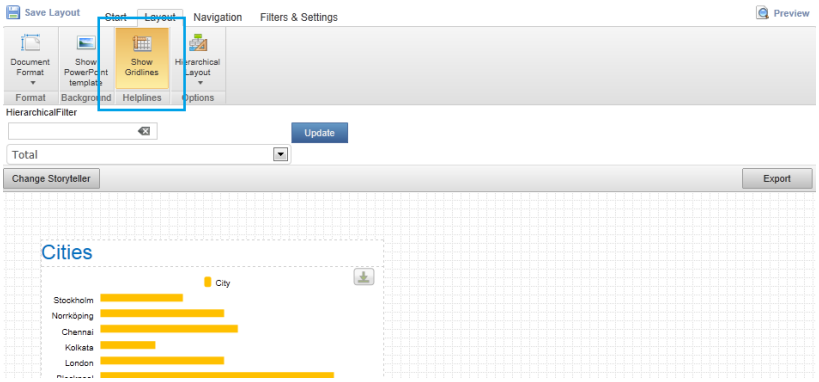
2. The chart is shown directly in the object box after saving it in setup mode, it is no need for clicking Update to show newly created charts.

3. When clicking Save layout the content stays in all the boxes, they will not be cleared

4. To prevent losing work in Storyteller setup - a warning message appears if you leave the page without having saved your latest changes. The warning message appears as soon as you do any action that makes you lose your changes, for instance when you click Preview, navigating to another Tab, refreshing the page (clicking F5) etc. Note that the warning message is shown in the same language as used in your browser.

3.2 GRIDLINES SUPPORT IN SETUP VIEW

Grid lines can be shown in the slide background during the setup-process. This makes it easier to align objects. The gridlines are turned On/Off in the Layout Tab as shown in the image below.



3.3 IMPORT/COPY SLIDES

Support for copying one or multiple Storyteller slides between different reports within a project (not between projects) has been implemented. This saves a huge amount of time and makes it possible to use templates projects for even faster setups.

To import one or several slides from another report:

Click the button named “Import slides” in the top toolbar in the Start Tab. See image 1 below.

1. Select reports to import slides from, if the report contains sub nodes a second dropdown list will appear to select both report and sub node.

2. Select slides to import, multiple slides can be selected.

3. Select if the new slides should be placed before or after the current slide

4. Click Import

5. The slides will now be imported (copied) to the current report. Remember to click Save Layout to save the new slides.

Image 1; shows the button to click in the top toolbar to get the Import window.

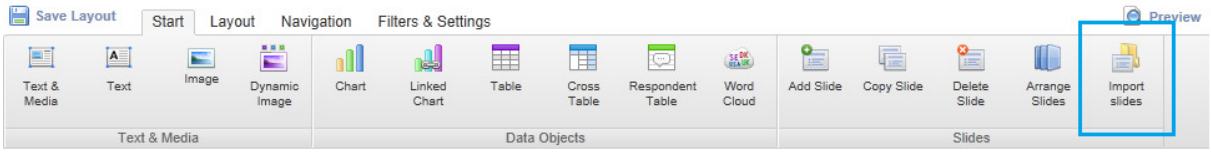
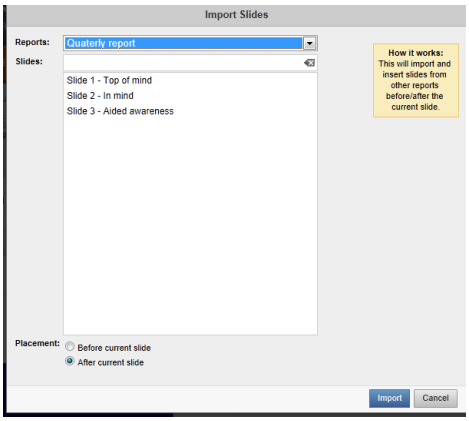


Image 2: Shows the import window



*Template projects; create a project with all your corporate standard reports. You then copy this project every time you create a new one. When you start the report setup you import (copy) slides from your template reports in the project. The template reports are never distributed and not shown to any Report Users.

3.4 NEW IMAGE OBJECT

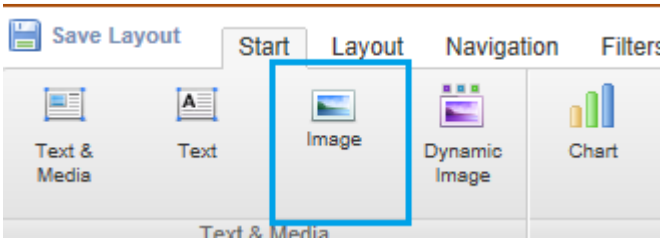
A new image object has been implemented which makes it even easier to add external images to your Storyteller reports.

To upload an image to your Storyteller slide you had to use the "Text and Media" object box in previous versions of Dapresy Pro. But now a new object type named Image has been implemented.

3.4.1 SETUP PROCESS

To insert an image simply click "Add image" in the Start Tab (see the image below), browse for the file, click "Insert" and you are done. The image can be resized online and placed anywhere in the online dashboards created in Storyteller.

The image below shows the button to click to insert an image.

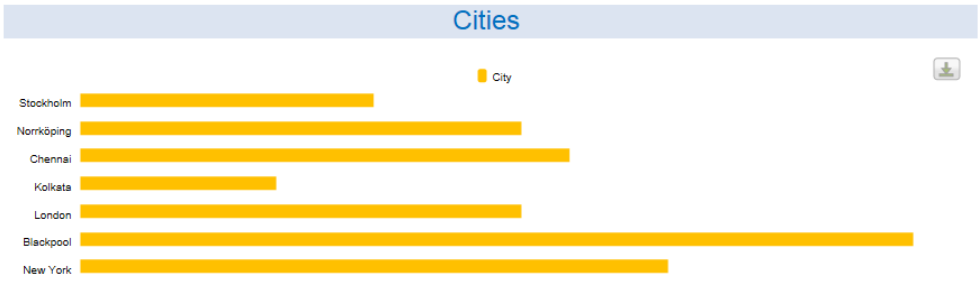


When the image has been inserted it can be resized like all the other object boxes. To restore the size to the original size right click in the image and select “Restore default size”.

Note; If the background of the image is transparent the image will be transparent both online and in the downloaded PPT file, this was not the case in the old image object as they got a white background in the exports and did cover a potential object behind the image. So by using this new image object you can now place images on top of charts etc.

3.5 ENHANCEMENTS IN THE TEXT OBJECT

The Text component in Storyteller has been totally reworked to make sure the text size is the same Online as in Power Point exports (which sometimes caused issues in version 7). Also new features for supporting text alignment and background colors have been added. In earlier versions the text was aligned left and background was transparent. The example below shows a centered text and a blue background.



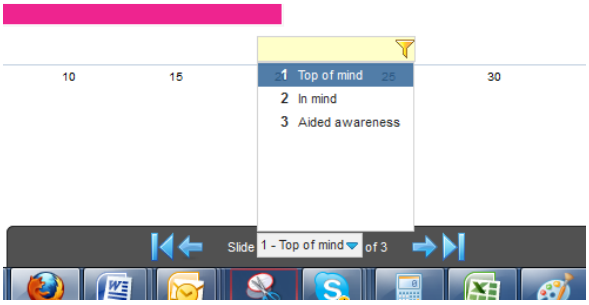
3.5.1 SETUP PROCESS

The controls for background colors are shown as an icon (the color bucket), the controls for text alignment can be found in the Text icon panel.

3.6 IMPROVED NAVIGATION

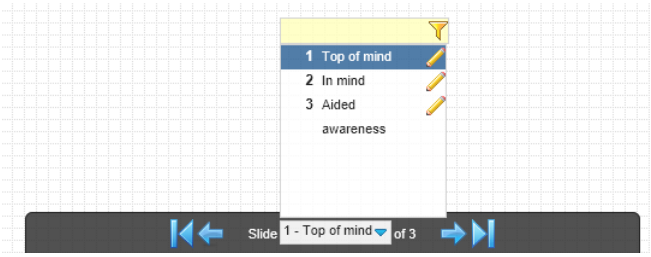
Support for naming each slide together with new quick navigation makes it easier to get an overview of all slides in your report. The new navigation is placed in the bottom navigation bar and the users can quickly navigate between slides and see the slide-names, see the example image below.

The image below shows an example of the new improved navigation.



3.6.1 SETUP PROCESS

To give each slide a name simply click the edit (pen) icon, when doing that a text field appears. To leave the edit mode just click outside the text box. The settings are saved when clicking “Save Layout” in the top left corner of the screen.



Note: The name is connected to each slide so when arranging the slides the names will be arranged as well.

4 IMPROVEMENTS IN THE GENERAL ADMINISTRATION PARTS

Chapter 4 describes new features and improvements in the general administration parts of the system. The following features/improvements are included.

- Improved Hierarchical filter creation
- Improved Report User (Report Holder) administration
- Portal Tabs" and "Edit Portal Tabs" merged to one screen
- Improvements in Invite module
- Cross Table Tool improvements
- Topline Improvements
- Possibility to define what date format to use in the project (allows for instance a US date format in the project)
- Additional floating time period options
- Improvements in data import

4.1 IMPROVED HIERARCHICAL FILTER CREATION

A completely new way of creating the hierarchical structure has been implemented. In earlier versions an Excel file showing the structure between units was imported to the project but now the structure can be derived from the imported data. This makes the process much smoother and more flexible. The setup time will be shortened and it is now much easier to correct mistakes in the setup later in the process without having to import all the data again.

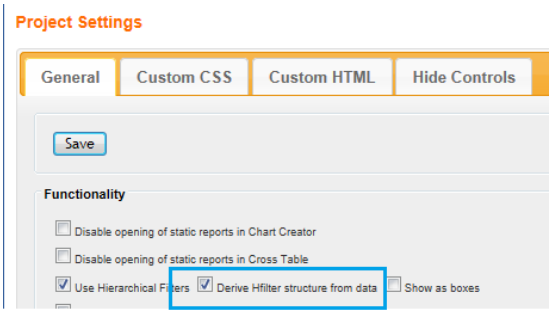
In short, the structure is derived from the imported data file and no other input files are needed. In a user interface the administrator defines which variables build the tree and the hierarchy between the variables.

SETUP PROCESS

PROJECT SETTINGS PAGE

To activate the new option to derive the Hierarchical structure from the data the option "Derive HFilter structure from data" and "Use Hierarchical Filters" must be checked in the Project settings screen as shown in the image below.

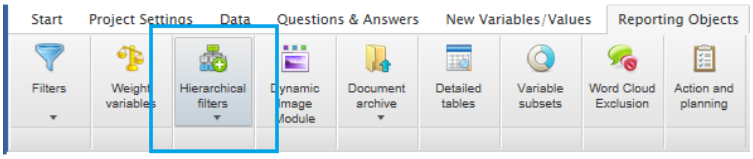
The image below shows the option "Derive HFilter structure from data" in the Project settings page.



HIERARCHICAL FILTER SETUP

Hierarchical structure is created in the screen named “Hierarchical filters” which sits inside the Reporting Objects Tab.

The image below shows where to find the new screen.



In the new screen 2 Tabs exist;

1. Define variable structure
2. Hierarchical structure

In the Tab “Define variable structure” you define which variables to use and the parent child relation between them. In the “Hierarchical structure” Tab you see all the hierarchical units and you also have the possibility to rename and delete nodes from the tree.

When deriving the structure from the data the following main steps are done, each of these is described in detail further down:

1. Tab; Define variable structure
    1. Selects variables and the hierarchy between them. All categorical variables can be used (single choice, multiple choice and also Computed variables*)
2. Tab; Hierarchical structure
    1. The hierarchical structure is derived (the system goes thru all the data and derives the hierarchical tree based on all the respondents answers, see some examples further down)
    2. The structure is shown on the screen
    3. The administrator can delete units that not should be included in the structure and change name of units.

**Only Computed variables can be used. Grouped, Basic derived, Gap questions and Index questions are not supported.*

To update the structure the user can:

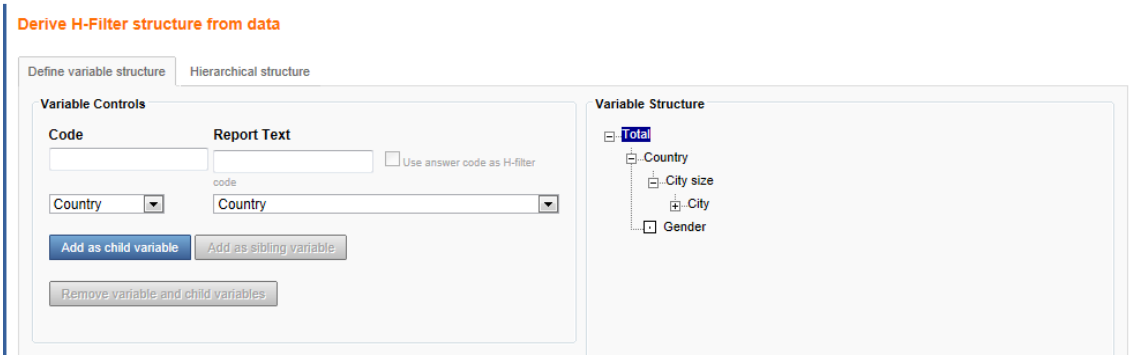
- Add new variables or remove variables that builds the structure at any time
- To update the tree the admin can use the following features
    - Add new nodes - the system search thru the data and add new nodes
    - Update names - if names have been changed in the answer blocks they are updated in the hierarchical structure
    - Remove nodes without respondents - the system searches thru the data and finds nodes without respondents which then can be deleted
    - Complete update (all the 3 steps above are performed)

DEFINE VARIABLE STRUCTURE TAB

Create structure
Define the structure as follows:

1. Select a variable in the variable list to be the second level in the tree structure (child to the Total unit)
2. In the tree structure to the right on the screen, select the parent node. Total is selected as default.
3. Click “Ad as child variable”
4. Now the selected variable will be placed as a child node to the selected node in the tree.
5. Repeat this procedure for all variables that should build the tree structure.

The image below shows the first Tab named Define variable structure.



Delete structure
To delete a variable in the tree - mark it and click “Remove variable and child variable”.

Note: You cannot delete a variable if the tree has been derived in the second Tab, the button “Remove variable and child variable” will be disabled in that case. So before deleting the variable - all its units need to be deleted in the second Tab. In that Tab use the button “Delete all nodes” to delete the complete tree. The downside is that the end-users will lose access rights to their Units as they are deleted so it is highly recommended that the hierarchical structure is created and approved before end-users are given access rights to different units.

HIERARCHICAL STRUCTURE TAB

Build tree
Structure from derived variables:

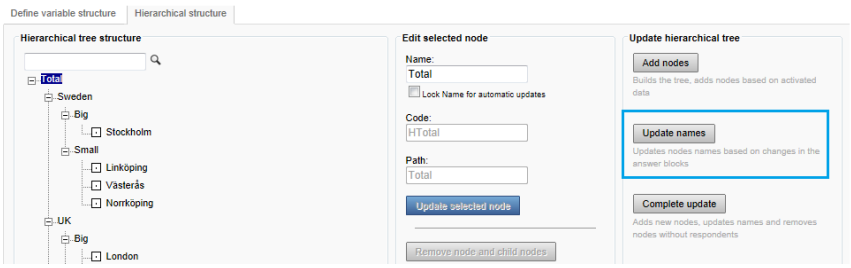
1. Click Add nodes → the system is going thru all the data and builds up the structure based on the defined variable structure
2. In a confirmation window all units are shown in a grid. Click Confirm (or Cancel) below the grid.
3. The tree structure appears to the left based on the defined variables.

Change node names

The names of the nodes can be updated by changing the text in the present answer block or by editing it directly in the tree.

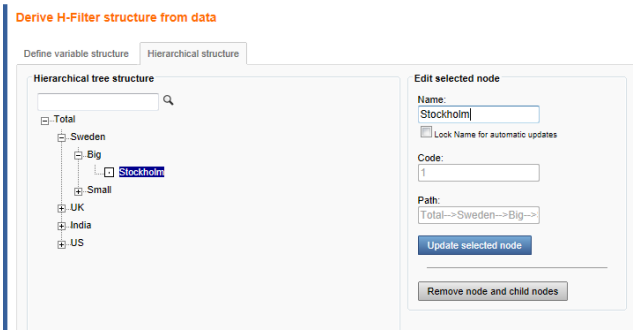
If it is changed in the answer block you need to click “Update names” as shown in the image below to apply the changes to the Hierarchical tree.

The Update names button is highlighted in the image below.



If you change the name in the tree you mark the node you want to change and then enter a new name and click “Updated selected node“ as shown in the images below.

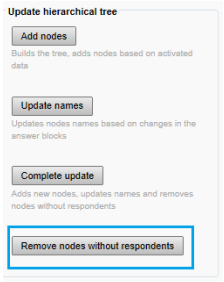
The Update selected nodes is he blue button in the image below.



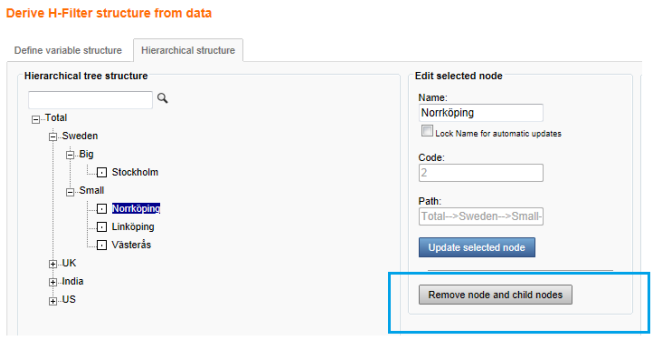
Note: If you change a node name in the tree and then run the action “Update names” the changed node names will be updated with the text in the present Answer block. You can lock the name for preventing updates by checking the option named “Lock Name for automatic updates” - the name will not be updated when running the action Update names.

Delete nodes

Nodes can be deleted in different ways. If a node does not contain any respondent at all they can be deleted by using the option “Delete nodes without respondents” (see the image below). Click that button and all nodes without any respondents will be shown in a list and can then be deleted.



If a node that should be deleted has respondents - it can be deleted by selecting them in the hierarchical tree and clicking “Remove nodes and child nodes” (see the image below).

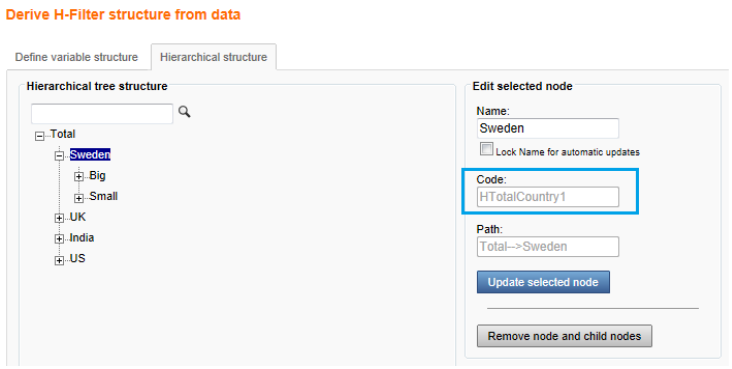


All nodes can also be deleted by using the feature “Delete all nodes”.

Note: If nodes with respondents have been deleted and you later run the action “Add new nodes” they will come back and you have to delete again.

CODE LOGIC

Each unit in the Hierarchical tree gets a code, the code of each unit can be viewed in the second Tab, see the image below. The code is important when for instance using the new Dynamic Image module as uploaded images need to contain the code in the image name for a correct mapping between an image and a unit.

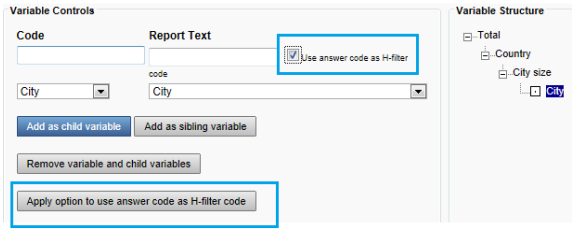


The code is created automatically based on the hierarchical path to the unit, this code cannot be changed. Although the imported answer IDs can be used in the variable that builds the hierarchical structure. So if for

instance having a structure like the example below the imported answer ID can be used in the Store variable as this makes it easy to connect for instance photos to this level.

- Continent
    - Country
        - City
            - Store

To use the imported answer IDs as codes check the box shown in the image below. This can only be done in one variable in the tree.



EXAMPLES

Below a few examples are shown based on the following: in the data file the variable “Region” and “City” are present. The user defined the hierarchy between the variables like below:

- TOTAL
    a. Region
        i. City

Example 1: if the data looks like below the structure will look like the right image. No data is aggregated from bottom to the top, the respondents only belong to the units they belong to in the data files.

DATA

	Region	City
resp1	South	City1
resp2	North	City2
resp3	South	Ciry3
resp4	North	City4
resp5	North	missing value in data
resp6	missing value	missing value in data
resp7	North	missing value in data

Tree structure

Total (6 resp)
- North (4 resp)
    - City2 (1 resp)
    - City4 (1 resp)
- South (2 resp)
    - City1 (1 resp)
    - City3 (1 resp)

Example 2: if the data looks like below the tree will look like the right image, as shown City3 is placed as child in both South and North.

DATA		
	Region	City
resp1	South	City1
resp2	North	City2
resp3	South	Ciry3
resp4	North	City3
resp5	North	missing value in data
resp6	missing value	missing value in data
resp7	North	missing value in data

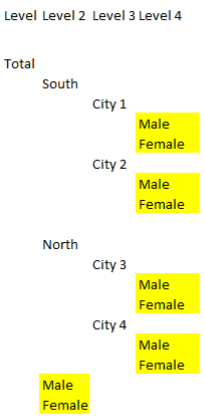
Tree structure	
Total (6 resp)	
North (4 resp)	
	City2 (1 resp)
	City3 (1 resp)
South (2 resp)	
	City1 (1 resp)
	City3 (1 resp)

Example 3: multiple variables can be placed in the same level. It is not restricted to one variable per level. In the example structure from above the variable “Gender” could for instance be placed in the same level as Region. In that case the tree looks like the right image.

DATA			
	Region	City	Gender
resp1	South	City1	Female
resp2	North	City2	Female
resp3	South	Ciry3	Male
resp4	North	City4	Female
resp5	North	missing value in data	Female
resp6	missing value	missing value in data	Female
resp7	North	missing value in data	Male

Tree structure		
Total (7 resp)		
	North (4 resp)	
		City2(1 resp)
		City4 (1 resp)
	South (2 resp)	
		City1 (1 resp)
		City3 (1 resp)
	Male (2 resp)	
	Female (5 resp)	

Example 4; A variable can be added to multiple levels in the hierarchy like in the example below - where Gender has been added to both level 2 and level 3.



RELATED UPDATES IN COMPUTE VARIABLE SCREEN

As Computed variables can be used for building the H-Filter structure the following limitations have been implemented in the Compute Variable screen.

- It is not possible to delete a Computed variable if it is used for deriving the H-Filter structure
- It is not possible to delete an answer alternative in a Computed variable if it is used for deriving the H-Filter structure
- When Updating a Computed Variable used in the H-Filter the unit belonging of each respondent in the H-Filter is updated automatically*

*Note: if new answer alternatives have been added to a Computed Variable which is used in H-Filter structure only the respondent belonging to its units is updated, no new Units are added automatically as that must be done in the new H-Filter screen itself by using the function “Add nodes”.

4.2 REPORT USER ADMINISTRATION*

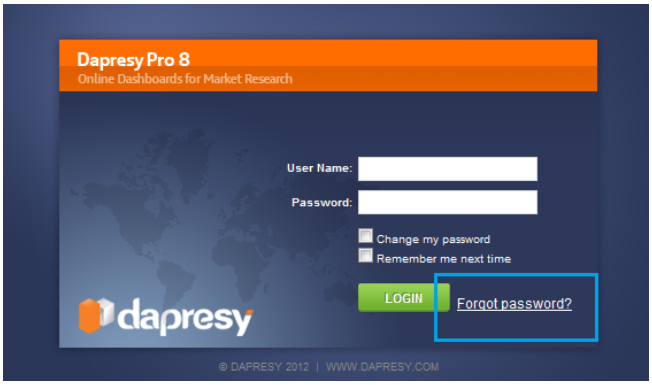
For better usability and higher security several improvements have been done in the Report User administration page as shown in the list below. Each of them is described in detail further down.

- Forgot my password function
- Improved password logic and authentication controls
- “Report Holder” has been renamed to “Report User”
- The following pages have been merged to one: Create, Edit, View delete and Invite Report Holders
- Support for uploading Report User access rights thru an Excel file (access to H-Filters and to Reports)
- Support for updating the Username has been added
- When deleting a Report user that only exist in one project it is now deleted from the main Report User database as well
- The unused setting “ Internal/External” has been removed

4.2.1 “FORGOT MY PASSWORD” FUNCTON*

If the user has forgotten the password a “Forgot my password” function is now located on the login screen.

The image below shows the Forgot my password link on the login screen.



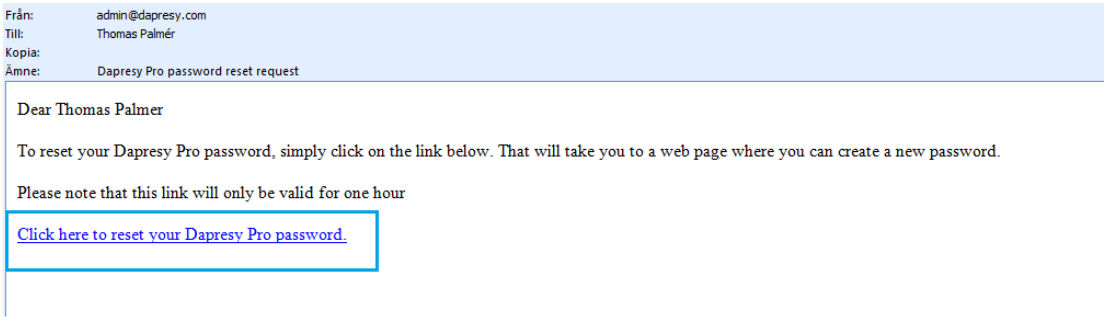
To reset the password the following steps are done:

1. Click the Forgot my password link on the login page* (shown in the image above)
2. Enter the username (see first image below)
3. An email is sent out with a link to the password reset page (see second image below)
4. Enter a new password in the Password reset page (See the third image below).

*Note; if you are using a custom login page instead of the Dapresy standard page the link might be missing. If you want to add the link please contact Dapresy Global Support.

The image below shows the second step in the process where the username is entered.

The image below shows the third step in the process, the link to the password reset-page is sent out in an email.



The image below shows the fourth step in the process, the new password is defined.

4.2.2 IMPROVED PASSWORD LOGIC AND AUTHENTICATION CONTROL*

To improve security three changes have been done on password logic and authentication control.

1. Password must be more complex
2. Password is never included in Invitation emails
3. After 3 consecutive unsuccessful login attempts account is locked out for user's IP for 10 minutes

PASSWORD RULES

For higher security the passwords rules are as follows from now on:

- min 8 characters
- at least 1 upper case letter
- at least 1 lower case letter
- at least 2 digits
- password cannot contain username

Existing passwords remain as they are but the next time the password is changed the new rules must be followed.

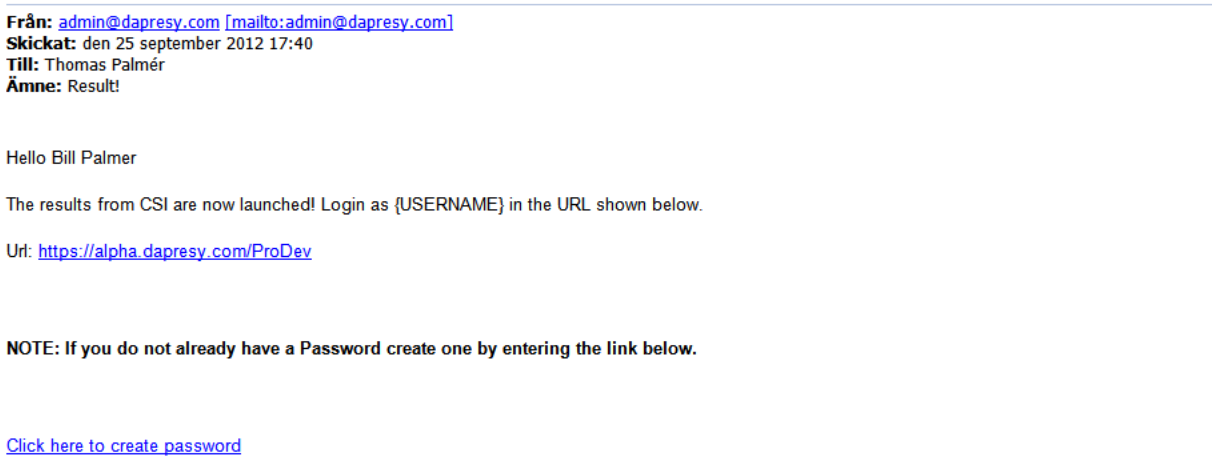
INVITES

For security reasons the password is not included in the Invitations email anymore. For new users a link can be included in the invitation email so they can create their own password.

To create a password the Report User clicks the link in the email – the password can then be set up in a new window.

NOTE; the link is open for 72 hours. After 72 hours the link cannot be used anymore and a new invite email must be sent out to the users that have not created their password.

The image below shows the link in an example invitation. The Report User has to click the link to create the password.



Från: admin@dapresy.com [mailto:admin@dapresy.com]
Skickat: den 25 september 2012 17:40
Till: Thomas Palmér
Ämne: Result!

Hello Bill Palmer

The results from CSI are now launched! Login as {USERNAME} in the URL shown below.

Url: https://alpha.dapresy.com/ProDev

NOTE: If you do not already have a Password create one by entering the link below.

Click here to create password

The mage below shows the screen for creating the password.

This means that it from now on – it is optional to define a password when creating a Report User.

- If the purpose is to use the Invite Module for inviting the Report User there is no need to add a password as the user has to create his own password anyway.
- If the login credentials will be shared in any other way a password must be defined during Report User creation.

AUTHENTICATION CONTROLS

The authentication control (the login process) has been improved for better security.

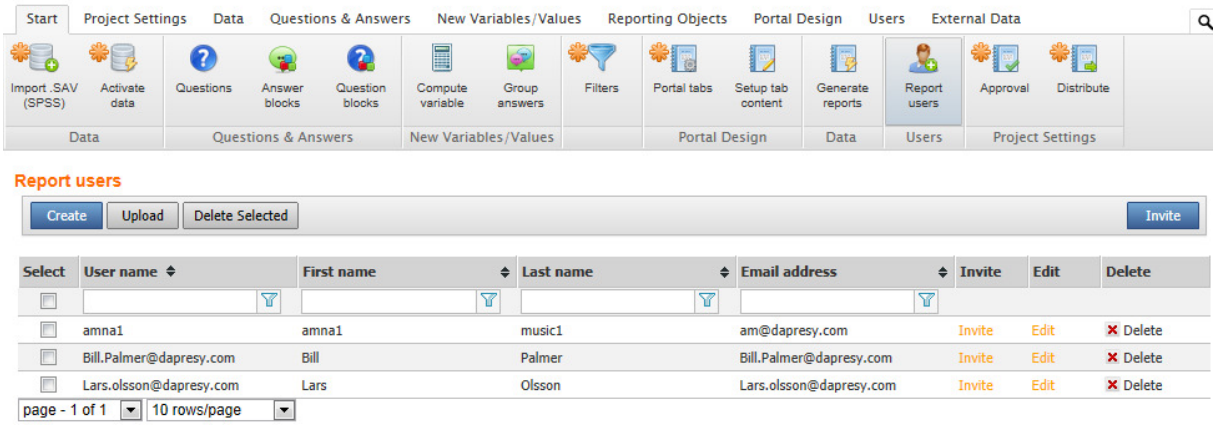
1. After every unsuccessful login attempt, response is delayed by 5 seconds
2. After 3 consecutive unsuccessful login attempts the account is locked out for the users IP for 10 minutes

4.2.3 IMPROVED USABILITY – 4 PAGES MERGED INTO 1*

For better usability the following Report User administration pages have been merged to one page;

- Create Report User
- Edit Report User
- View/delete Report Users
- Invite Report Users

The new page looks like the image below.



To create a user click the Create button and a popup window appears where all user details are entered.

To upload users (Excel upload) click the Upload button and a popup window appears where the file can be uploaded.

To invite users click either the Invite link which is shown in each row or select multiple users and click the Invite button below the user grid.

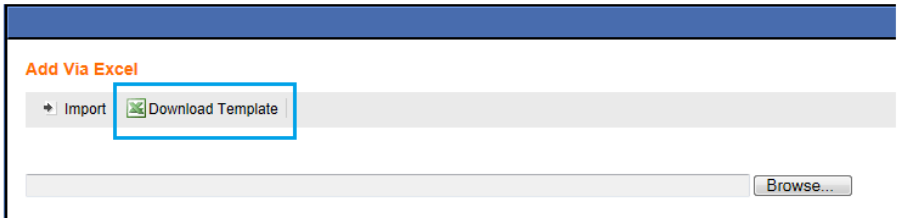
To delete users click either the Delete link which is shown in each row or select multiple users and click the Delete button below the user grid.

4.2.4 EXCEL UPLOAD OF ACCESS RIGHTS*

The feature for Excel uploads of Report Users to the project has been improved so it also covers the access rights of the Report Tabs and Hierarchical Filter Groups. In previous versions only the user details could be uploaded.

To upload the access rights a template needs to be downloaded. Download it by clicking the “Download Template” button in the popup window as shown in the image below. In the template new columns for Report Tabs and Hierarchical Filter Groups have been added.

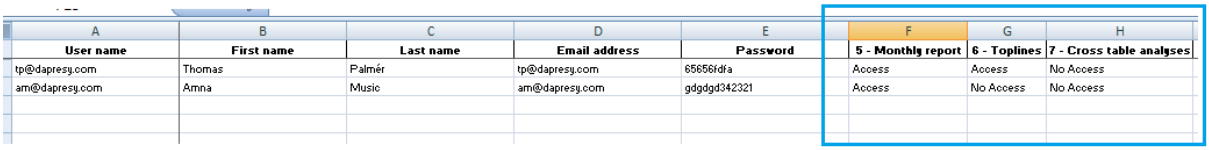
The image below shows the button to click for downloading the Excel template.



ACCESS TO REPORT TABS

In the downloaded Excel template each report in the project is shown in its own column. To give Access Rights to a report select “Access” in the selection list as shown in the image below. If you leave a cell blank it will be treated as “No access”.

The image below shows the template and how to give Access Rights to a report.



A	B	C	D	E	F	G	H
User name	**First name**	**Last name**	**Email address**	**Password**	**5 - Monthly report**	**6 - Toplines**	**7 - Cross table analyses**
tp@dapresy.com	Thomas	Palmér	tp@dapresy.com	65656fdfa	Access	Access	No Access
am@dapresy.com	Amna	Music	am@dapresy.com	gdgdgd342321	Access	No Access	No Access

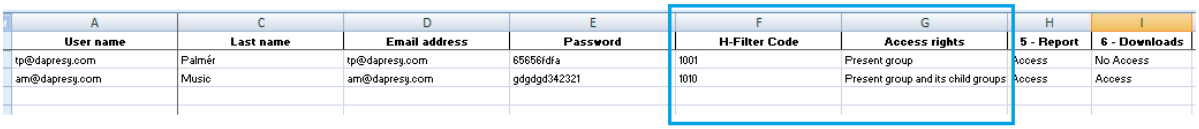
The uploaded file does not need to contain a column for each report in the project. If a column is missing the uploaded Report users just don’t get any access rights to that column.

Note: The ID number shown in the column header is an internal ID used to identify the report during the upload process, due to that those cells are write protected so the IDs cannot be changed. The name in the header is not used for the identification of the report so the report name can be changed even after the template has been downloaded.

ACCESS TO HIERARCHICAL FILTER GROUPS

Are we dealing with an H-Filter project? Then two additional columns are included in the downloadable template. The columns are shown below and named “H-Filter Code” and “Access Rights”.

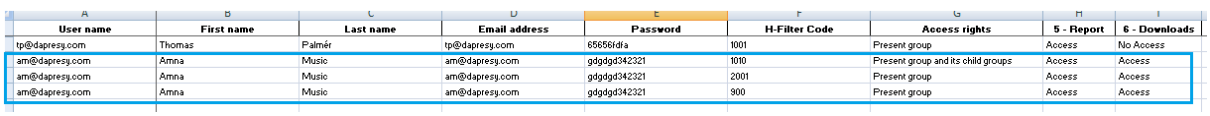
The image below shows the columns used for entering access rights to hierarchical filter groups.



A	C	D	E	F	G	H	I
User name	**Last name**	**Email address**	**Password**	**H-Filter Code**	**Access rights**	**5 - Report**	**6 - Downloads**
tp@dapresy.com	Palmér	tp@dapresy.com	65656fdfa	1001	Present group	Access	No Access
am@dapresy.com	Music	am@dapresy.com	gdgdgd342321	1010	Present group and its child groups	Access	Access

In the H-Filter-column the code of the group the Report user should have access rights to is entered. In the next column you define if the user should have access rights to this unit only or to the parent or child groups as well.

If the user should have access rights to groups in different parts of the hierarchical structure the user can be entered in multiple rows in the uploaded Excel file, see example below. The identification between the rows are done on User name, if a Report user is present in multiple rows the User details from the last row will be used.



A	B	C	D	E	F	G	H	I
User name	**First name**	**Last name**	**Email address**	**Password**	**H-Filter Code**	**Access rights**	**5 - Report**	**6 - Downloads**
tp@dapresy.com	Thomas	Palmér	tp@dapresy.com	65656fdfa	1001	Present group	Access	No Access
am@dapresy.com	Amna	Music	am@dapresy.com	gdgdgd342321	1010	Present group and its child groups	Access	Access
am@dapresy.com	Amna	Music	am@dapresy.com	gdgdgd342321	2001	Present group	Access	Access
am@dapresy.com	Amna	Music	am@dapresy.com	gdgdgd342321	900	Present group	Access	Access

4.2.5 UPDATING USER NAMES*

The user name can now be updated. In previous versions it was not allowed due to an “old” Universe module which is not in use any more.

To update the username enter the Edit the Report window. In the window the User name can now be changed like all other user details.

4.2.6 DELETING REPORT USERS*

A Report User can have access rights to one or multiple projects. When a Report User with access rights to multiple projects is deleted from a project the user is kept in the main user list. If a Report user with access to one project only is deleted from that particular project it will be deleted from both the project and the main user list. In previous versions a Report User was never deleted from the main user list which caused issues as a Report User without access to any project still had the possibility to login (but not select any projects)

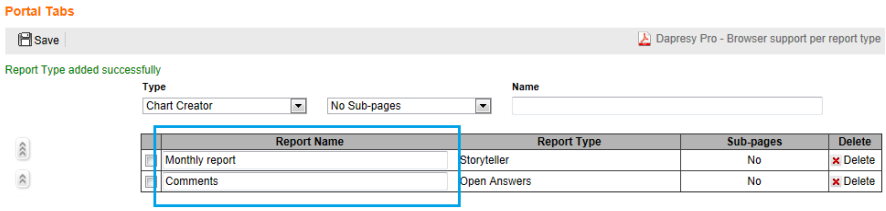
(All old Report Users without access rights to any projects have been deleted from the main user list as well.)

4.3 “ADD PORTAL TABS” AND “EDIT PORTAL TABS” MERGED INTO ONE SCREEN*

The Portal Tabs page has been improved - the names of existing Portal Tabs can be updated in a single screen.

The page is still named “Portal Tabs” and is located in the same position as before in the navigation. To edit the name simply edit the text in the grid shown in the image below and save the changes.

The image below shows the updated page. To change the name change the text in the highlighted part of the grid and click Save.



4.4 INVITATION MODULE IMPROVEMENTS*

The Invitation module for sending e-mail invites to Report Users has been improved. As mentioned in chapter 4.2 the Invite screen has been removed and the invites are done in the “Report User screen”. The Password logic has also been changed as described in chapter 4.2.2. Besides that the following improvements have been added:

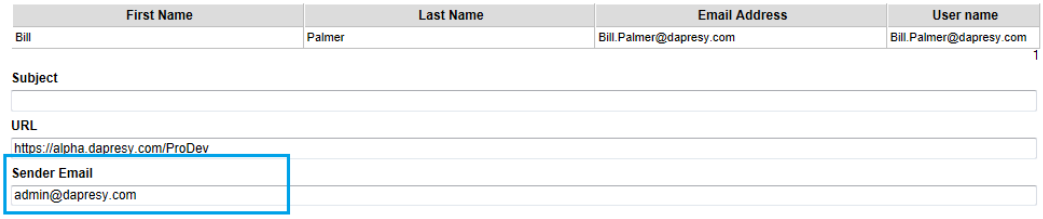
1. support for entering the Sender email address
2. support for styling the email body text (font, size and color)
3. token support for adding for instance first name and user name anywhere in the e-mail (in previous versions the URL, username and password had a fixed position in the bottom of the invite e-mail).

4.4.1 DEFINING SENDER EMAIL ADDRESS*

To add your own Sender email address enter it in the text field shown in the image below. The email address shown in that field will be the sender address shown for the receiver of the email. The benefits of entering an own email address are;

1. If the invites bounce due to for instance wrong email addresses you will be aware of it.
2. If the sender of the email replies to the invite email it will go to this defined address.

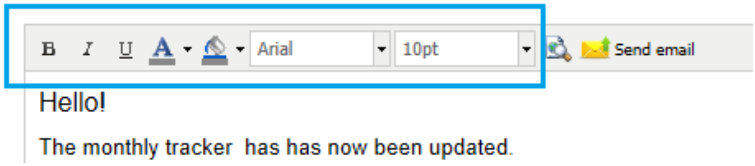
The image below shows where to enter the Sender email address.



4.4.2 TEXT STYLING*

Basic text styling is now supported and images can be inserted in the invitation email. To style the text use the toolbar shown in the image below.

The image below shows the new text styling controls in the invite module.



4.4.3 TOKEN SUPPORT FOR INCLUDING USERNAME, FIRST NAME, LAST NAME ETC*

The token support makes it possible to send dynamic invite emails like the example below where user specific information automatically has been included in the text. The example shows how an invitation email based on the new token support might look.

Hello Thomas Palmer

*Please visit **www.manager.dapresy.com** and log in as **tp@dapresy.com** to access your reports.*

Best regards

Tom

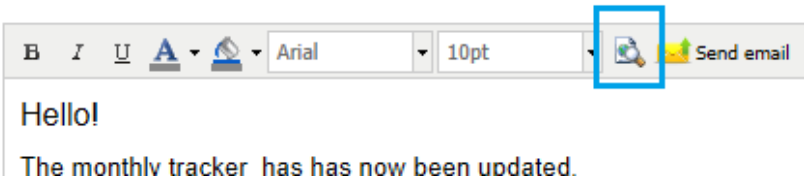
To enter user specific information the following tokens can be used in the email text:

- {USERNAME} – for username
- {PASSWORD} – for password
- {FIRSTNAME} – for first name
- {LASTNAME} – for last name
- LOGINURL} - for content of "Url" textbox (should contain a link to your login page)
- {CREATEPASSWORD} - link to "Create password" page (for report holders who don't have a password or need a new one)

If no tokens are present in the email no user specific information will be included, not even the url, username and password.

Note: to make sure the tokens have been entered correctly use the Preview feature, when clicking the buttons shown in the image below the Invite email for the first Report user appears in a new window.

The image below shows the Preview button.



The example below shows how the example email above was defined.

Hello {FIRSTNAME} {LASTNAME},

*Please visit **{LOGINURL}** and log in with **{USERNAME}***
to access your reports.

Best regards

Tom

4.4.4 HTML OR PLAIN TEXT***

If the receiver of the email does not have HTML support the link for creating password is hard to use as shown in the images below. Due to that an option has been added so the emails can be sent out either in HTML or in Plain text.

*The example image below is a **HTML based invite and the receiver supports HTML**. The "Create Password link" will be a link, the user just clicks the link to enter the page.*

Create password url: Click here to create password

*The example image below is a **HTML based invite and the receiver does not support HTML**. The "Create Password link" is shown together with HTML code, the user needs to copy the yellow highlighted part of the URL and paste it into the browser to enter the page.*

```
Create password url: Click here to create password
<https://alpha.dapresy.com/ManagerPatch/reset.aspx?md=UElqb4jpFg974FMjMijxUqFq
qH1Jeem%2bgQYsQlUayiQ%3d&fpu=gAvu0aRDsvxVUNg9%2bEgxq44P3%2fRBJ4Tq9XziB35XUNU%3
d&rpt=LJQHtSOkgJDXX0bP%2bHzQKxDatjQu95OnA2VgdWA7%2f6eHBTijMfmOmUb4kXqxZiHiT8xB
8jZ3N4wLU6r5Ct098Q%3d%3d&np=EogsoOEuzPxh55vBiJqp7wCNkKExNGrwowqE6OFrOgEduVOYFW
A2jMUFL1Eiw247ZuPtVa0l1ct2by%2bMKdKc5Q%3d%3d>
```

*The example image below is a **plain text invite and the receiver does not support HTML**. The "Create Password link", the yellow highlight text, needs to be copied and pasted in the browser to enter the page.*

```
Create password url:
https://alpha.dapresy.com/ManagerPatch/reset.aspx?md=UElqb4jpFg974FMjMijxUqFqq
H1Jeem%2bgQYsQlUayiQ%3d&fpu=gAvu0aRDsvxVUNg9%2bEgxq44P3%2fRBJ4Tq9XziB35XUNU%3d
&rpt=B0%2fS6nBsgKWuWllZnAIqwrB4jUc%2bFmMguUzytrTZ9HR0OFSRI519NTsmWokYqKWzqsjZx
4uD2Zr5Yv%2fi%2b4jN9w%3d%3d&np=EogsoOEuzPxh55vBiJqp7wCNkKExNGrwowqE6OFrOgEduVO
YFWA2jMUFL1Eiw247ZuPtVa0l1ct2by%2bMKdKc5Q%3d%3d
```

*The example image below is a **plain text invite and the receiver does support HTML**. The "Create Password link" will be a link and the user just clicks the link to enter the page.*

Create password url: https://alpha.dapresy.com/ManagerPatch/reset.aspx?md=UElqb4jpFg974FMjMijxUqFqqH1Jeem%2bgQYsQlUayiQ%3d&fpu=gAvu0aRDsvxVUNg9%2bEgxq44P3%2fRBJ4Tq9XziB35XUNU%3d&rpt=vbdL4z8x48vYMQvx4GkuoC3L%2bdNjLVcoa7mwHllIVCftSKzAi4d%2bT8hj8ziC6%2fIQ%2bTBvlHRh5%2fURaO9BoLv5zg%3d%3d&np=EogsoOEuzPxh55vBiJqp7wCNkKExNGrwowqE6OFrOgEduVOYFWA2jMUFL1Eiw247ZuPtVa0l1ct2by%2bMKdKc5Q%3d%3d

4.4.4.1 SETUP PROCESS

The HTML option is default, to change to plain text use the radio buttons highlighted in the image below. If Plain text is selected no text formatting can be done as that require HTML support.

The image shows the settings for selecting between HML and Plain text.

Text

Following tokens are available:

- {USERNAME} – for username
- {FIRSTNAME} – for first name
- {LASTNAME} – for last name
- {LOGINURL} - for content of "Url" textbox (should contain link to login page)
- {CREATEPASSWORD} - link to "Create password" page (for report holders which don't have a password or need a new one)

HTML Plain text

B I U A Font Family Font Size Send email

Login url: {LOGINURL}

Username: {USERNAME}

Create password url: {CREATEPASSWORD}

Advice: If you are unsure about the HTML support in the target organization use the plain text option.

4.5 MULTIPLE LANGUAGE SUPPORT IN REPORT USER VIEWS*

Multiple Language support has been implemented and is supported in both the questionnaire and in the end user interfaces which makes it possible for the Report User to select which language to view the reports in.

The image below shows the language selection in the Report User view.

In the Questionnaire no limitations exist and any language can be added but at the current state the user interface supports: Swedish and English. German, French and Dutch are coming soon.

4.5.1 REPORT-USER VIEW

The report user can select what language to view the report in a selection list as shown in the image above. The list shows all the languages in the project that have been setup by the Administrator.

The language selection remains when navigating between different reports/Tabs within the project. The selected language is also applied to the exports (Power Point and Excel) of the reports.

The language selection control only appears if the project contains two or more languages.

4.5.2 SETUP PROCESS

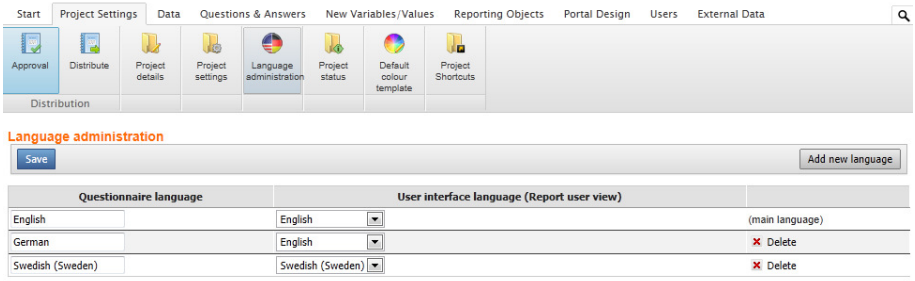
The setup consists of two steps in two different screens.

1. The languages to use in the project are defined
2. The translation of the questionnaire is done in an Excel download/upload process.
    a. an Excel file is downloaded
    b. the translations are done in the Excel file
    c. the Excel file with translations is uploaded into the project.

DEFINE LANGUAGES SCREEN

The number of languages and the names of the languages are defined in a new screen named: “Language Administration” - which is located in the Project Settings Tab as shown in the image below.

The image below shows the new screen for defining the languages in the project.



To add a new language click “Add new language” - a new row appears for each added language. Each Questionnaire language“ is connected to a “User interface language” so when adding a new Questionnaire language the User interface language to be shown must also be selected.

As shown in the image further up one level is the “master language”. The master language is the default language shown for the Report Users when they enter the first report. The questionnaire text in the master language is taken from the imported data files (.sav or Triple-S).

TRANSLATIONS

The translation process of the questionnaire and Computed Variables are explained in chapter 4.6. It is done in a separate screen as the function can be used in projects with one language only for editing the meta-data in Excel for a faster set-up and editing process.

4.6 EXCEL PROCESS FOR UPDATING META DATA*

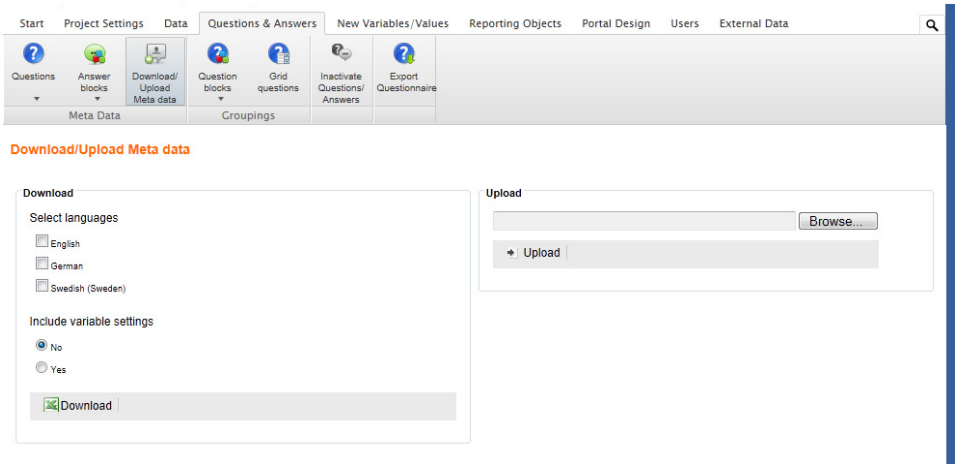
A new efficient process allows updating the meta-data (the questionnaire texts and the variable settings) in a downloaded Excel file which then can be uploaded back into the project.

The function is also used in projects with multiple languages to translate the questionnaire into the additional languages. Due to the Excel process the new function allows a translation process where all the question and answer-option texts can be translated by an external party and then easily updated in the system.

4.6.1 SETUP PROCESS

This new function sits in a new screen named “Download/Upload Meta data” and is placed in the Question and Answer Tab as shown in the image below.

The image below shows the new screen.



The following settings can be updated in the Excel file:

- Questions
  - Question texts in all present languages
  - Question color
  - Question type
- Answer alternatives (per Answer block)
  - Answer text in all present languages
  - Answer color
  - Exclude from average setting
  - Average factor setting
  - Positive/Neutral/Negative setting

DOWNLOAD/EDIT THE EXCEL FILE

As shown in the image above the user selects which languages to download and if the variable settings should be included in the downloaded Excel file or not. If the purpose is just to change the texts then the settings do not need to be downloaded.

The downloaded Excel file contains 2 sheets, one for all the Answer blocks and one for all Questions. The lists below shows the columns that are present in each sheet. The **bold** columns in the list are columns that cannot be updated in the Excel file as they are internal database IDs , those columns are write protected in the downlaoded file. The columns in *italic* are the Settings columns which can be included in the downloaded Excel file.

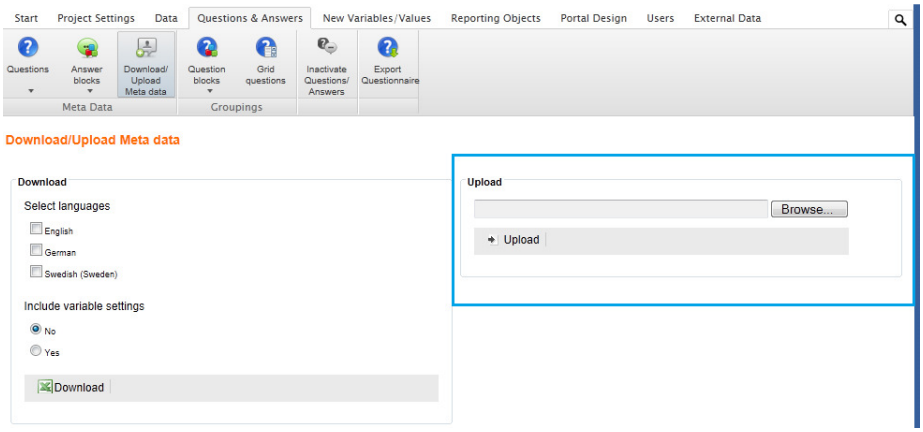
- Columns in Answer block sheet
  - **Answer ID**
  - **Answer block name**
  - *Exclude from average (settings column)*
  - *Average factor (settings column)*
  - *Negative/Neutral/Positive (settings column)*
  - *Color (settings column)*
  - Answer text (one column per language)

- Columns in Question sheet
  - **Question ID**
  - **Question Code**
  - *Question type (settings column)*
  - *Color*
  - Question text (one column per language)

UPLOAD THE EXCEL FILE

To upload the file use the controls shown in the image below.

The image below shows the upload controls.



During the upload the file gets validated – if an error occurs - the upload stops and the errors in the file are shown in an error message on the screen. The following validations are performed:

1. Language names in column headers
   a. unknown language names → import stops

2. Answer ID and Question ID
   a. unknown Answer ID or Question ID → import stops
3. Colour codes,
   a. un-valid colour codes → import stops
   b. blank colour codes → the existing colour codes are used
4. Average factor
   a. non numeric factor→ import stops
5. Positive/negative/neutral settings
   a. Unknown setting → import stops
6. Inlcude in Average setting
   a. Unknown setting → import stops
7. Validate changed question type (only valid updates are Single choice <-> Single choice scale)

Note; Empty text cells are allowed. If the text cells are empty no update is done.

4.7 CROSS TABLE TOOL IMPROVEMENTS*

In the Cross Table Tool we have made the following improvements:

1. Support for multiple weighting
2. Improved support for low-base warnings and new support for hiding results with low bases
3. New Variable search function in the setup mode

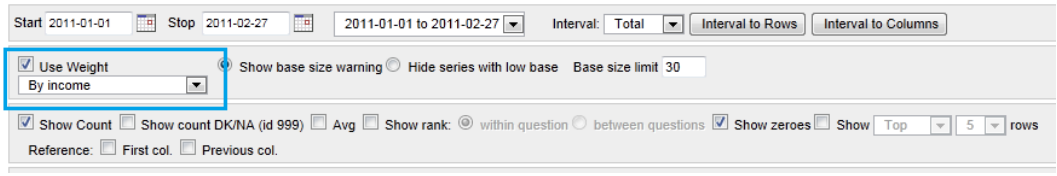
4.7.1 MULTIPLE WEIGHTING*

The Cross Table Tool now supports multiple weighting. How to define the multiple weight variables is explained in chapter 2.17.1.

Report User View

When creating a cross table you simply select which weight variable to use, the selection is done in a selection list as shown below. If unweighted values should be used that is done thru unchecking the “Use Weight” check box.

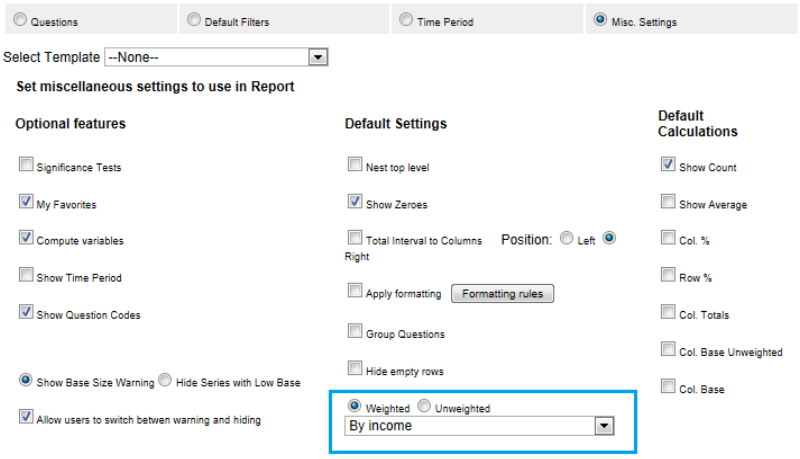
The image below shows where to find the new setting in the Cross Table Tool.



Setup process

In the setup screen Define Tab Content it is possible to set the default Weight variable, it is done in the Misc. Tab as shown in the image below.

The image below shows the Misc. Tab in the setup of the Cross Table Tool.



4.7.2 IMPROVED BASE SIZE WARNING AND HIDE FOR LOW BASE FEATURE*

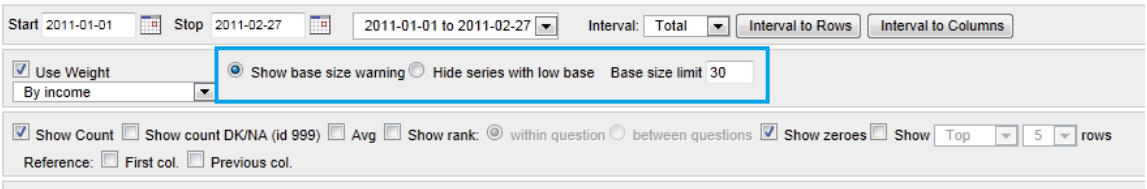
The existing Cross Table function for warning for low bases has been improved so the results now either can be shown with a warning or be completely hidden due to the low base. The base size limit itself can also be changed in the Report user view, in the previous version it could only be changed in the setup view of the Cross Table Tool.

The new settings are optional and can be turned off during the setup of the Cross Table Tool.

End user view

In the end user view the controls for selecting between Hide and Warn and changing the limit appears as shown in the image below. The new controls only appear if the Administrator has allowed the Report User to change those settings during the setup.

The image below shows where to find the controls in the Cross Table Tool.



As before: results with a low base get a grey background if the Warning function is used, if the Hide function is used the result is hidden completely as in the example images below.

The image below shows two tables, in the left table the Warn function has been used and in the Right Table the Hide function has been used. The base size limit in this example is 100.

		Prepaid or Postpaid	
		Prepaid	Postpaid
		Column%	Column%
Spontaneous brand awareness - Top of mind	Dapresy Telecom	28.03%	17.81%
	Four	7.24%	2.45%
	Swedish Telecom	5.76%	11.55%
	Sweet Talk	11.49%	14.19%
	Telecom for You	8.79%	3.94%
	Duty Calls	6.98%	8.68%
	Base	258.73	78.09

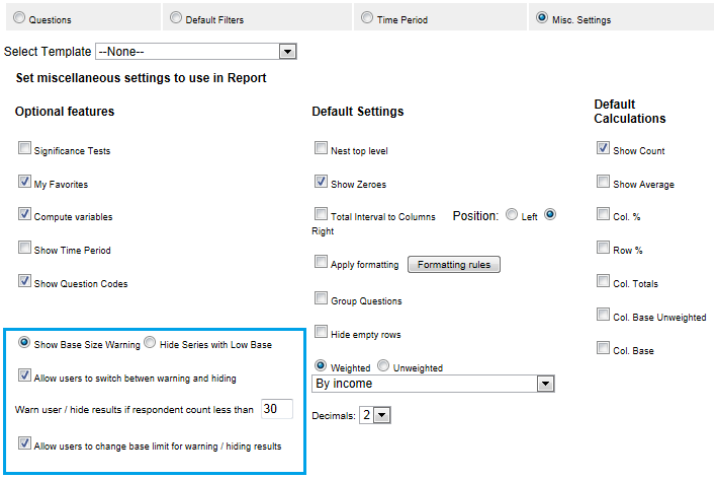
		Prepaid or Postpaid	
		Prepaid	Postpaid
		Column%	Column%
Spontaneous brand awareness - Top of mind	Dapresy Telecom	28.03%	
	Four	7.24%	
	Swedish Telecom	5.76%	
	Sweet Talk	11.49%	
	Telecom for You	8.79%	
	Duty Calls	6.98%	
	Base	258.73	

Setup

The new settings are optional. No changes have been done to existing projects. In new projects the default settings allow the Report User to change between Warn and Hide and also change the base size limit.

The settings are placed in the Misc. sheet in the setup page of the Cross Table Tool as shown in the image below.

The image below shows the setup.



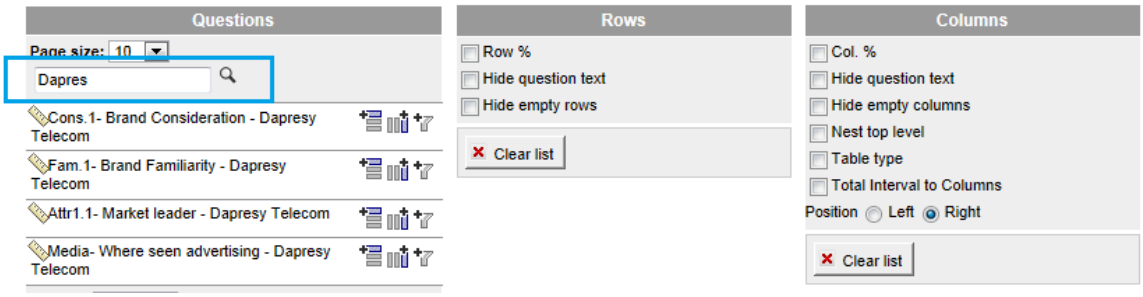
By checking the option “Allow users to switch between warning and hiding” the Report User will be able to select if the results should be hidden or shown with a warning. If the option is not checked - the present selection in the two radio buttons “Show base size warning” or “Hide series with low base” will be used.

By checking the option “Allow users to change base limit” the Report user will be able to change the base limit.

4.7.3 VARIABLE SEARCH*

A new search function has been added to the Cross Table Tool which makes it easier to find variables in big projects.

The image below shows the new variable search.



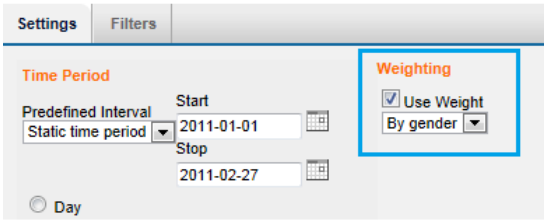
To search enter the text and click the search icon.

4.8 TOPLINE IMPROVEMENTS*

The Topline report now supports multiple weights just like the Cross Table Tool and the Storyteller Charts. How to define the multiple weight variables is explained in chapter 2.17.1.

When creating a Topline you simply select which weight variable to use, the selection is done in a list as shown below in the Settings Tab. If unweighted values should be used that is done thru unchecking the “Use Weight” check box.

The image below shows where to find the new setting.

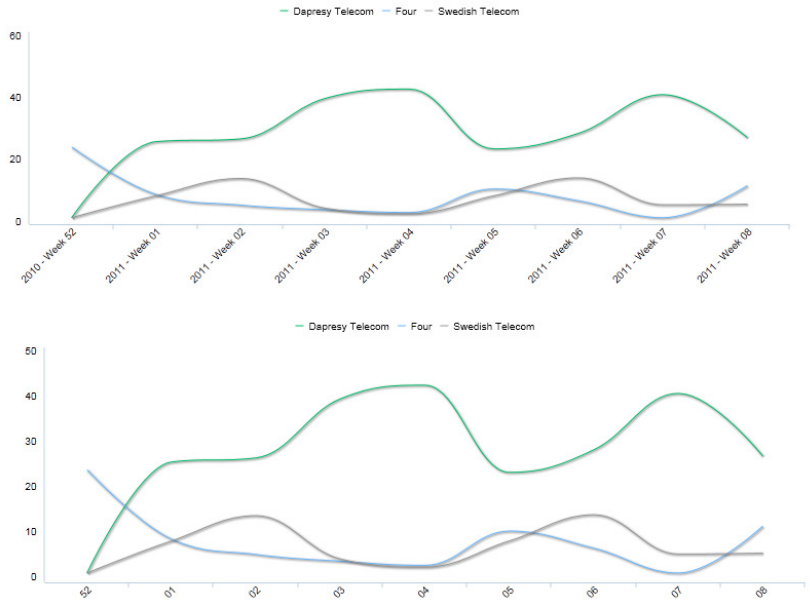


4.9 CUSTOM DATE FORMATS**

Improvements have been done in the date format used in Dapresy Pro to support as many as possible of the date formats used around the world. On a project level the administrator selects what format to use in the project, for instance use a US date format instead of the default format.

The improvement has been done both in the calendar functions and also in the reports as shown in the images below. The new date format is present in all report types in the system.

The example image below shows a Storyteller chart with 2 different Week formats:



The example image below shows a Storyteller table with 2 different Month formats:

	2011 - January	2011 - February
Dapresy Telecom	31.9%	29.1%
Four	4.4%	6%
Swedish Telecom	6.4%	6.9%
Sweet Talk	14.5%	11.7%

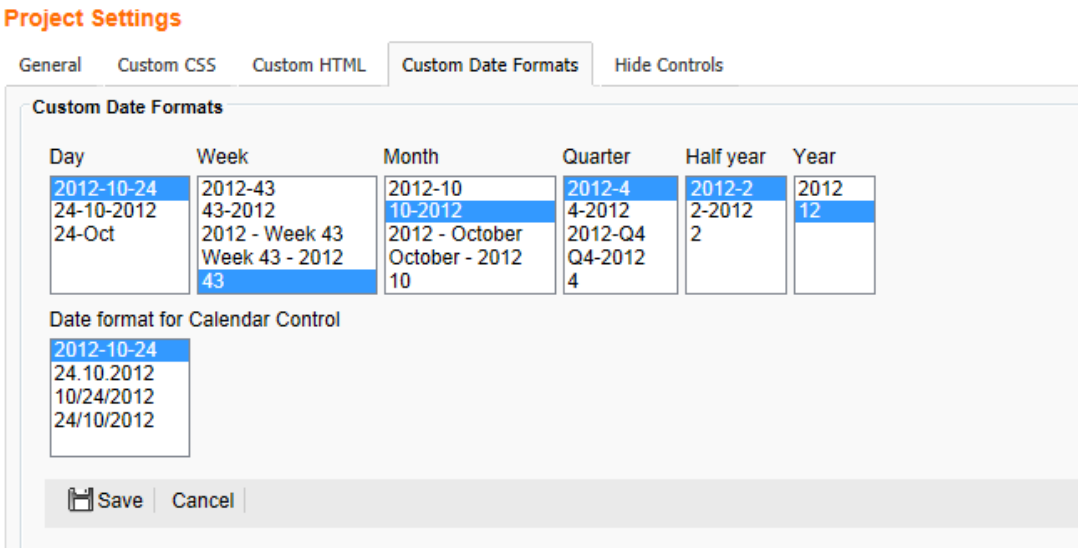
	01-2011	02-2011
Dapresy Telecom	31.9%	29.1%
Four	4.4%	6%
Swedish Telecom	6.4%	6.9%
Sweet Talk	14.5%	11.7%

SETUP PROCESS

The new settings are done on a project level and not on a report/chart/table level. The settings are done in the screen Project Settings in a new Tab named Custom date format.

In the new screen the setup is done in two steps. Step 1 for defining the date format to use in charts and tables and step 2 for defining the overall date format used in calendars. In both steps the administrator selects what format to use in pre-defined date format lists as shown in the image below.

The image below shows the new administration screen for defining the date format to use in the project. One option is selected in each selection box.



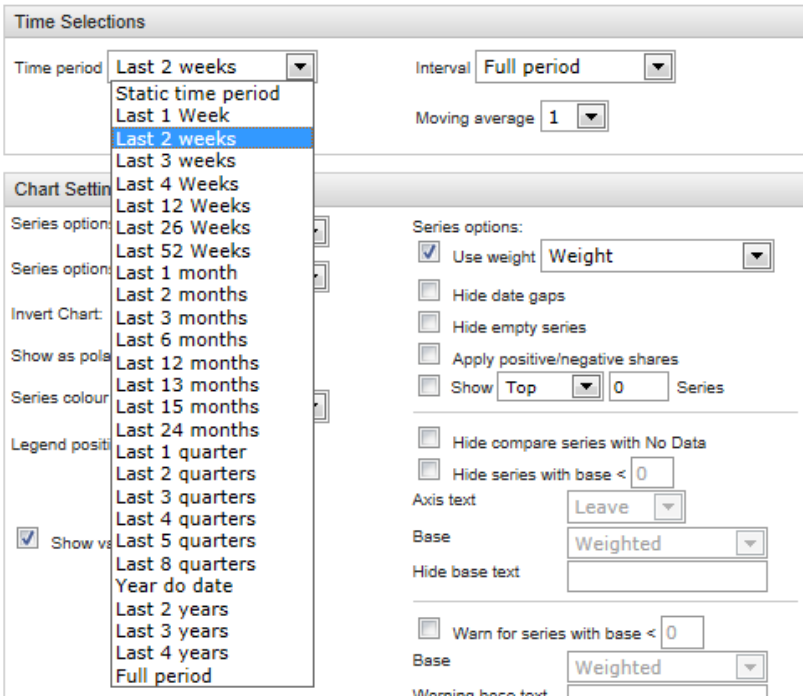
4.10 ADDITIONAL FLOATING TIME PERIOD OPTIONS*

During the setup of tables and charts in Dapresy Pro a floating time period option can be used, the floating time period option can for instance be Last 52 weeks or Last 2 Quarters. Six new floating time periods have been added to the list which can be used for all modules.

- Last 2 weeks
- Last 3 weeks
- Last 2 months
- Last 2 years
- Last 3 years
- Last 4 years

In the future a dynamic solution will be implemented which allows full flexibility but if you are missing any floating time period options until then please contact Dapresy Global Support.

The image below shows the list of floating time periods during the chart setup.



4.11 SPSS DATA IMPORT IMPROVEMENT***

In some cases the data files contains non clean case data which needs to be cleaned outside Dapresy Pro, for instance some data collection tools adds values like 99999 or 99998 if the question was not responded by the respondent.

To save time a new option makes it possible to define data values to be deleted during the data import to Dapresy Pro, the values will be deleted both from the Meta data and the Case data. The deletion is done on a general level and not defined per variable.

Note: The logic is applied to all variables and not only to categorical variables. The function will be improved in a future version so for instance Numeric variables can be excluded from the logic.

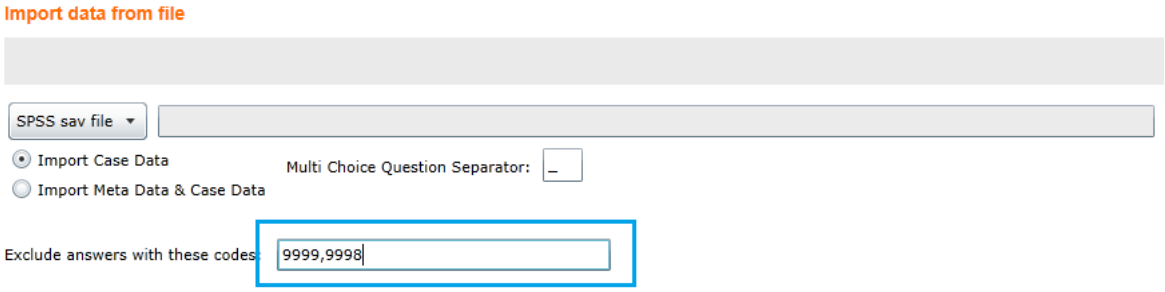
.

4.11.1 SETUP PROCESS

In the import screen a new input field has been added, in this field you define the data values to be deleted. It is possible to add multiple cases like in the example image below, use comma as separator.

The defined data values are being saved so next time you enter the import screen you don't need to enter those again. As they are stored they are being used by the Import scheduler function as well.

The image below shows the input field for defining the data values to be deleted.



4.12 IMPORT SCHEDULER IMPROVEMENT***

Two improvements have been done in the Import scheduler, each of them described in the following chapters:

- New option for selecting which report(s) that should be pre-generated
- Support for automatic update of Hierarchical Filters

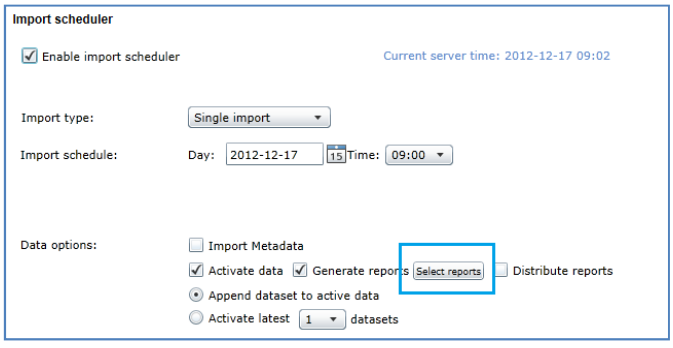
4.12.1 SELECT REPORTS TO PRE-GENERATE***

In the previous version of the Import scheduler all distributed reports were being pre-generated if the option "Generate reports" was chosen. A new option has now been added which makes it possible to select which reports that should be pre-generated during the automatic data import process.

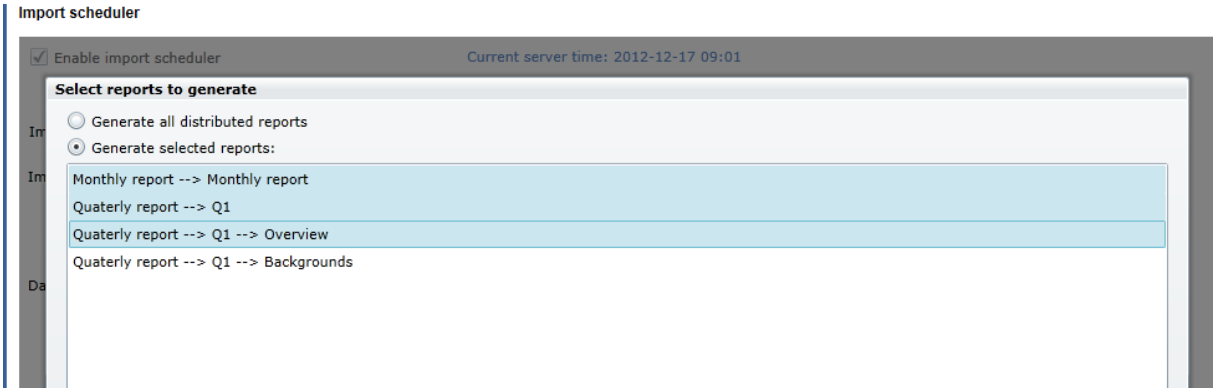
4.12.1.1 SETUP PROCESS

In the Import scheduler screen the reports to pre-generate are selected in a popup window that appears when clicking Select Reports. As default all reports are selected which means that no changes have been done in any existing project that uses the Import Scheduler.

The image below shows the button to click to select reports to generate.



The image below shows the popup window for selecting reports to pre-generate.



4.12.2 AUTOMATIC UPDATE OF HIERARCHICAL FILTER STRUCTURE ***

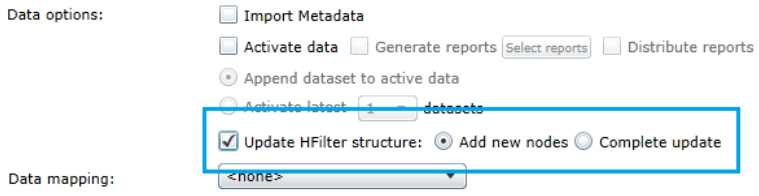
A new option makes it now also possible to update the Hierarchical structure if new groups/nodes are present in the newly imported data file.

4.12.2.1 SETUP PROCESS

In the Import Scheduler screen the new option appears in Hierarchical Filters projects only. As shown in the image below two options are present which are described further down.

1. Add nodes - only new groups/nodes are being added to the strcuture
2. Complete update – new nodes are being added, nodes without data are being deleted etc.

The image below shows the option for updating the Hierarchical structure. Add nodes are default selected.



Add nodes

When the Add nodes option is selected new nodes are being added automatically to the hierarchical filter structure based on the imported data set.

Note: When new hierarchical groups are being added to the structure they are not being added to the Storyteller reports automatically. That needs to be done manually in the screen for defining Optional Filters in the Storyteller view.

Option Complete update

If Complete update is selected the following updates are done in the hierarchical structure during the import:

1. The names of the units are being updated if the meta data has been updated.
2. All existing groups without respondents are being deleted

3. New groups are added

Note: When new hierarchical groups are being added to the structure they are not being added to the Storyteller reports automatically. That needs to be done manually in the screen for defining Optional Filters in the Storyteller view.