

Forsta Visualizations February 2024 Release



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1 Introduction

This document describes new and improved features in the Forsta Visualizations 2024 February Release.

If you would like to know more about these features, please contact the support team at VisualizationsSupport@forsta.com and they will be able to assist you.

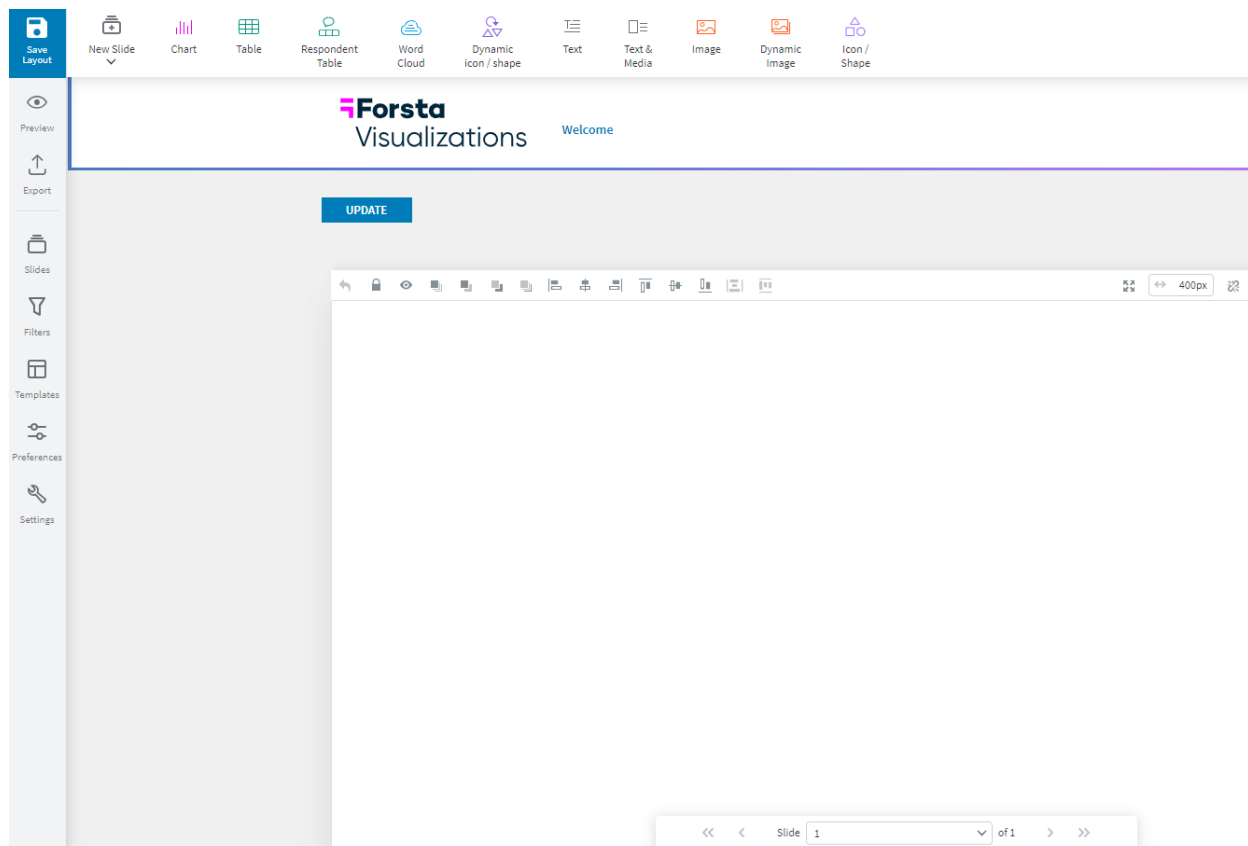
Best Regards,
Forsta Team

2 Overview

StoryTeller

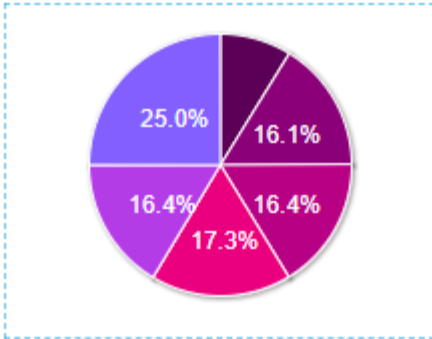
- StoryTeller UI – Refreshed ribbon menu, slide panel and design toolbar – Feature toggle

A newly updated user interface (UI) has been rolled out, accessible via a feature toggle. This UI draws inspiration from the design principles employed in Forsta Visualizations project pages, where the toolbar resides on the left side. To create objects, simply click on the object located at the top. Additionally, the object icons have received a fresh update.



- Pie Chart Label Enhancement

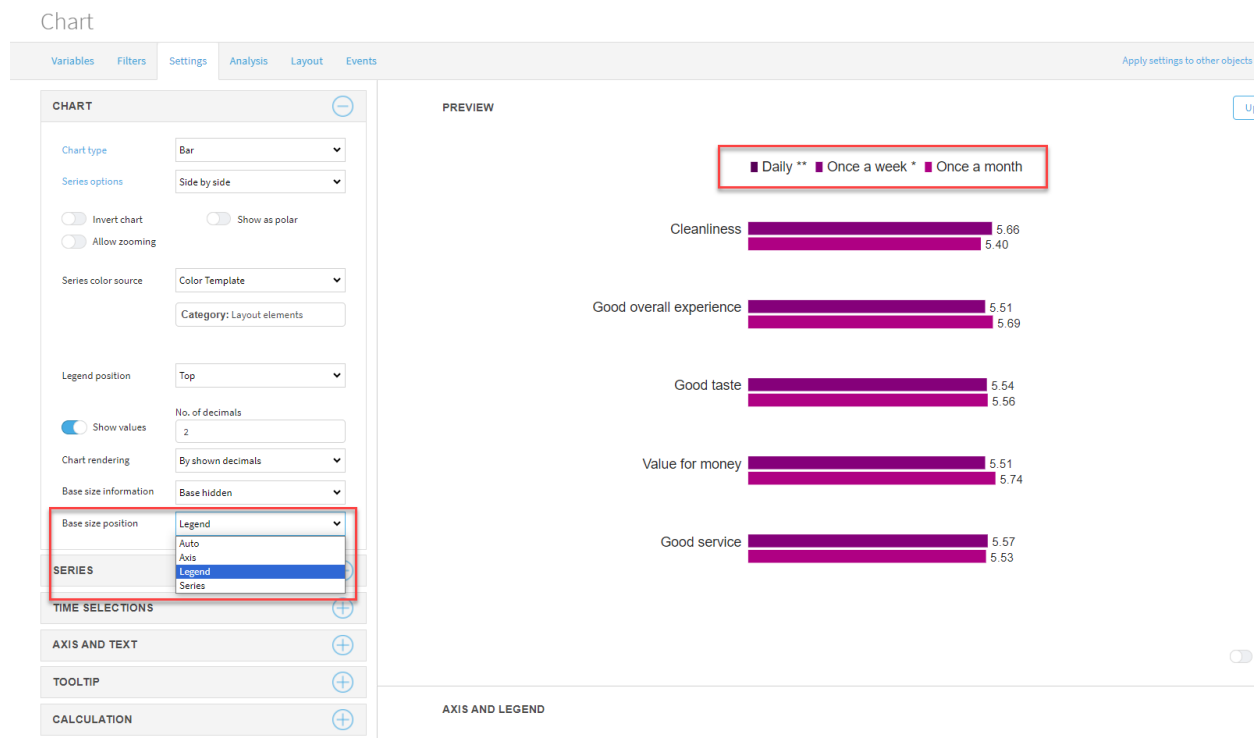
Labels in pie charts will now be hidden when the slice area is too narrow to display the value. This aligns with the behavior in regular bar/column charts.



- To easier select multiple slides within your slide panel, "Shift" logic has now been added, among the already existing keyboard shortcuts.

- Base size position in Charts

The option to select where the base will be shown have now been enabled to be selected even if base isn't shown in the object. This improvement will help to select where the chart should show the asterisk for the feature "hiding or warning due to low base".



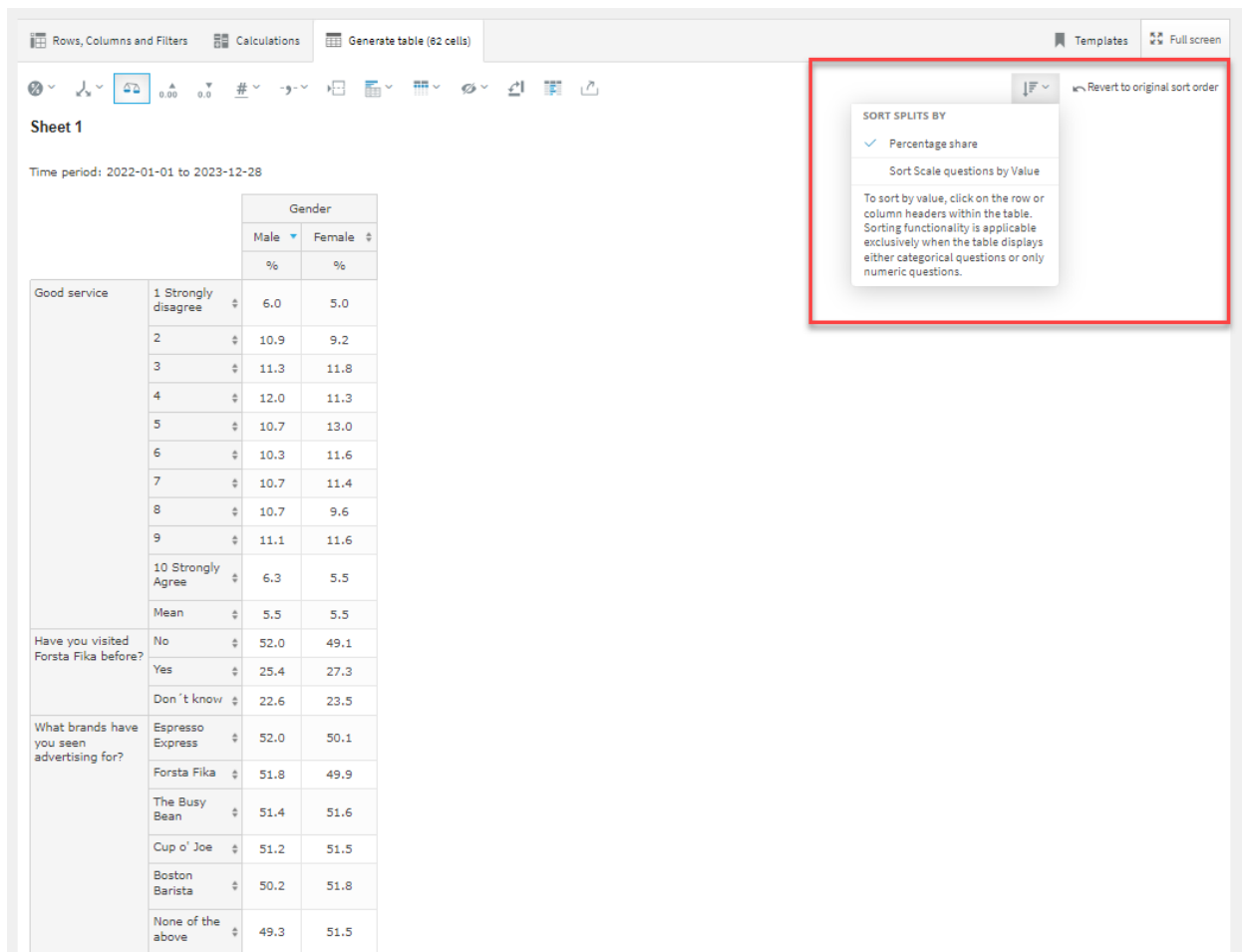
CrossTable tool

- Optimizations on loading Workbooks

To enhance workbook loading speed, we've introduced several optimizations. When navigating between "Row, Columns, and Filters," "Calculation," and "Generate table," the system now refrains from recalculating the table unless specific changes have been applied. Similarly, we've extended this improvement to the loading process of Questions and Answers while switching between sheets within your workbook.

- Option to exclude Scale questions for value sorting

We've introduced a new feature that allows you to selectively include or exclude scale questions when sorting by percentage or count. This functionality is now the default setting for all new workbooks. You can access it through the new sorting icon located in the upper right corner of the CrossTable tool.



The screenshot shows the CrossTable tool interface. At the top, there are tabs for 'Rows, Columns and Filters', 'Calculations', and 'Generate table (62 cells)'. Below these are icons for various functions. The main area displays 'Sheet 1' with a time period of '2022-01-01 to 2023-12-28'. A table is shown with columns for 'Gender' (Male, Female) and percentages. The table data is as follows:

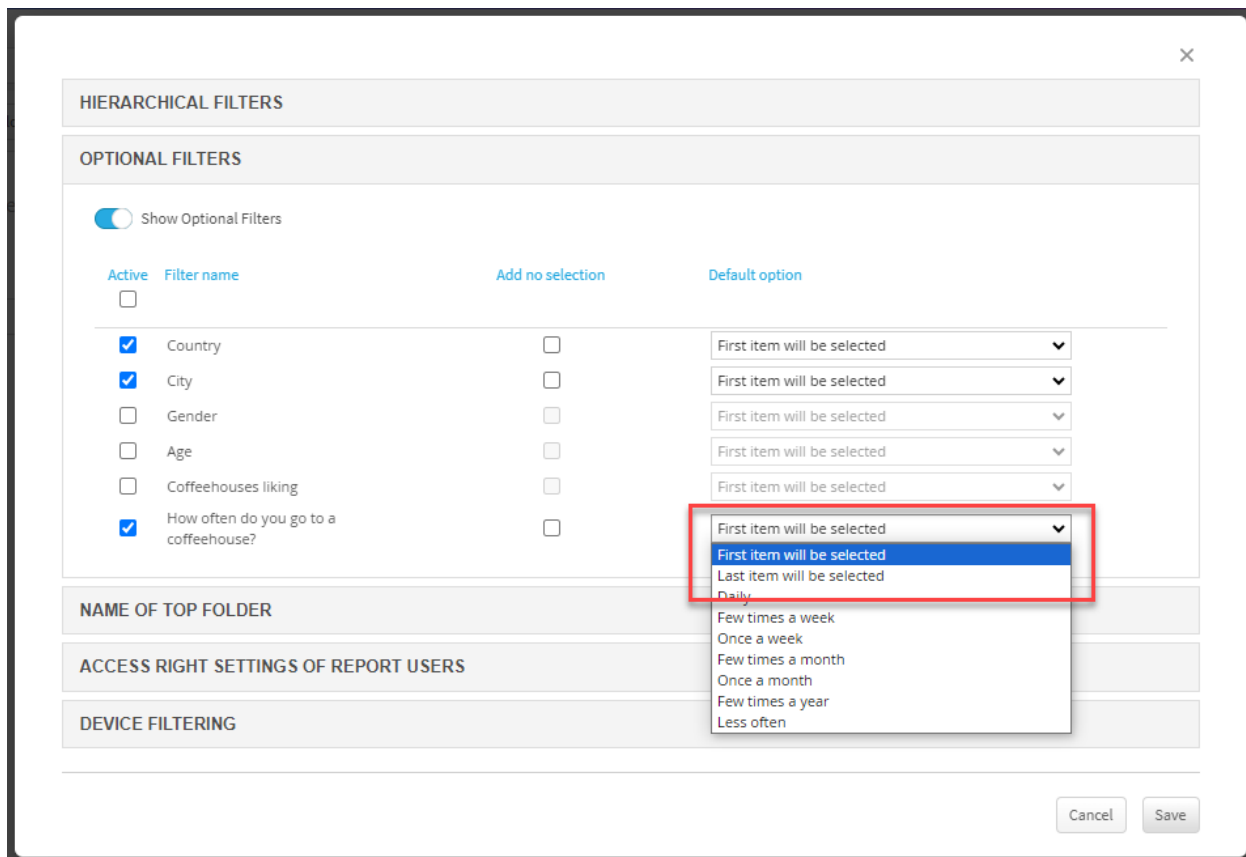
		Gender	
		Male	Female
		%	%
Good service	1 Strongly disagree	6.0	5.0
	2	10.9	9.2
	3	11.3	11.8
	4	12.0	11.3
	5	10.7	13.0
	6	10.3	11.6
	7	10.7	11.4
	8	10.7	9.6
	9	11.1	11.6
	10 Strongly Agree	6.3	5.5
	Mean	5.5	5.5
Have you visited Forsta Fika before?	No	52.0	49.1
	Yes	25.4	27.3
	Don't know	22.6	23.5
What brands have you seen advertising for?	Espresso Express	52.0	50.1
	Forsta Fika	51.8	49.9
	The Busy Bean	51.4	51.6
	Cup o' Joe	51.2	51.5
	Boston Barista	50.2	51.8
	None of the above	49.3	51.5

A sorting menu is open on the right, titled 'SORT SPLITS BY'. It has two options: 'Percentage share' (selected) and 'Sort Scale questions by Value'. Below the menu, there is a note: 'To sort by value, click on the row or column headers within the table. Sorting functionality is applicable exclusively when the table displays either categorical questions or only numeric questions.' A 'Revert to original sort order' link is also present.

Document Archive

- Additional filter options added to Document Archive

To consolidate filter options across various report types, the “First/Last item will be selected” choice can now serve as the default filter option within the Document Archive as well.



The screenshot shows a configuration window for the Document Archive. It includes sections for Hierarchical Filters, Optional Filters, Name of Top Folder, Access Right Settings of Report Users, and Device Filtering. The Optional Filters section is active, showing a list of filters with checkboxes for 'Active', 'Add no selection', and 'Default option'. A dropdown menu is open for the 'Default option' of the 'How often do you go to a coffeehouse?' filter, showing options like 'First item will be selected', 'Last item will be selected', 'Daily', 'Few times a week', 'Once a week', 'Few times a month', 'Once a month', 'Few times a year', and 'Less often'. The 'First item will be selected' option is highlighted in blue.

Active	Filter name	Add no selection	Default option
<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Country	<input type="checkbox"/>	First item will be selected
<input checked="" type="checkbox"/>	City	<input type="checkbox"/>	First item will be selected
<input type="checkbox"/>	Gender	<input type="checkbox"/>	First item will be selected
<input type="checkbox"/>	Age	<input type="checkbox"/>	First item will be selected
<input type="checkbox"/>	Coffeehouses liking	<input type="checkbox"/>	First item will be selected
<input checked="" type="checkbox"/>	How often do you go to a coffeehouse?	<input type="checkbox"/>	First item will be selected

NAME OF TOP FOLDER

ACCESS RIGHT SETTINGS OF REPORT USERS

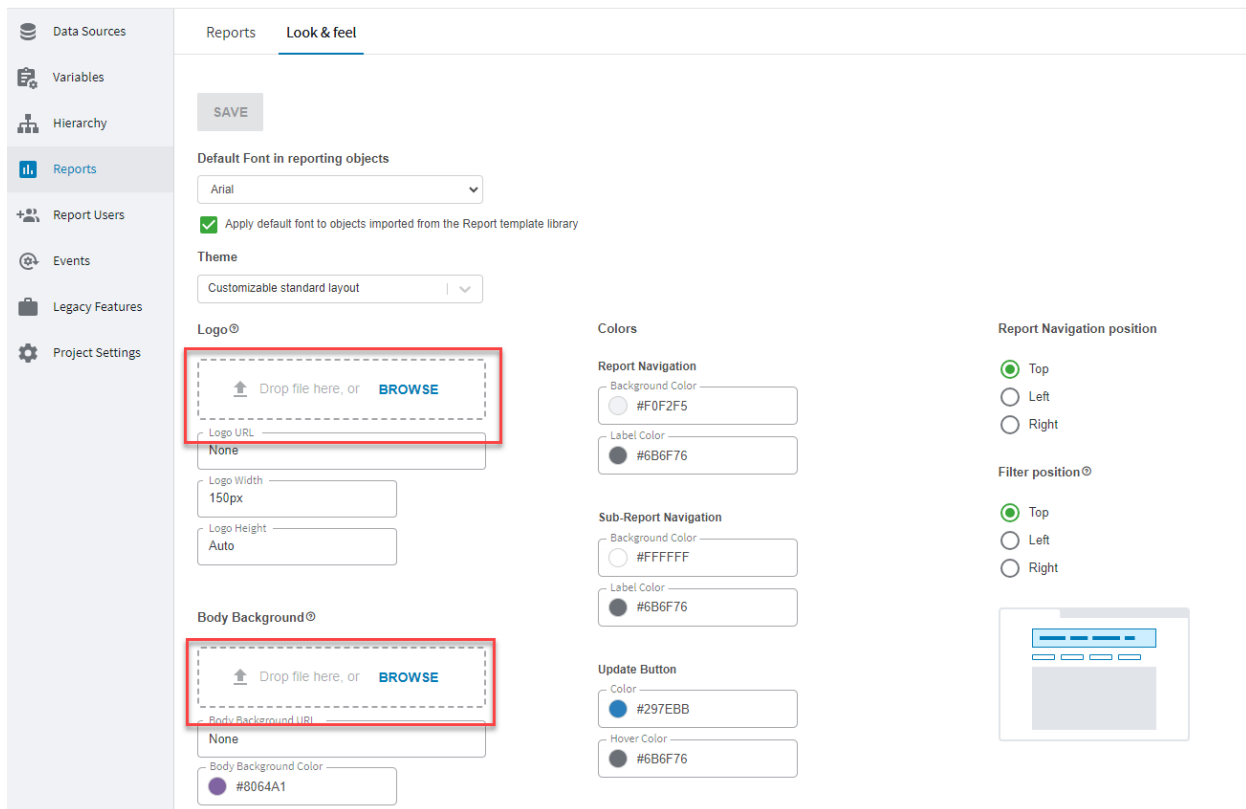
DEVICE FILTERING

Cancel Save

Project administration

- Customizable Project theme

In our theming tool, we've introduced an option to directly upload logos and background images from your own storage, rather than restricting them to external URLs only.



Look & feel

SAVE

Default Font in reporting objects

Arial

☒ Apply default font to objects imported from the Report template library

Theme

Customizable standard layout

Logo®

Drop file here, or [BROWSE](#)

Logo URL

None

Logo Width

150px

Logo Height

Auto

Body Background®

Drop file here, or [BROWSE](#)

Body Background URL

None

Body Background Color

#8064A1

Colors

Report Navigation

Background Color

#F0F2F5

Label Color

#6B6F76

Sub-Report Navigation

Background Color

#FFFFFF

Label Color

#6B6F76

Update Button

Color

#297EBB

Hover Color

#6B6F76

Report Navigation position

☒ Top

☐ Left

☐ Right

Filter position®

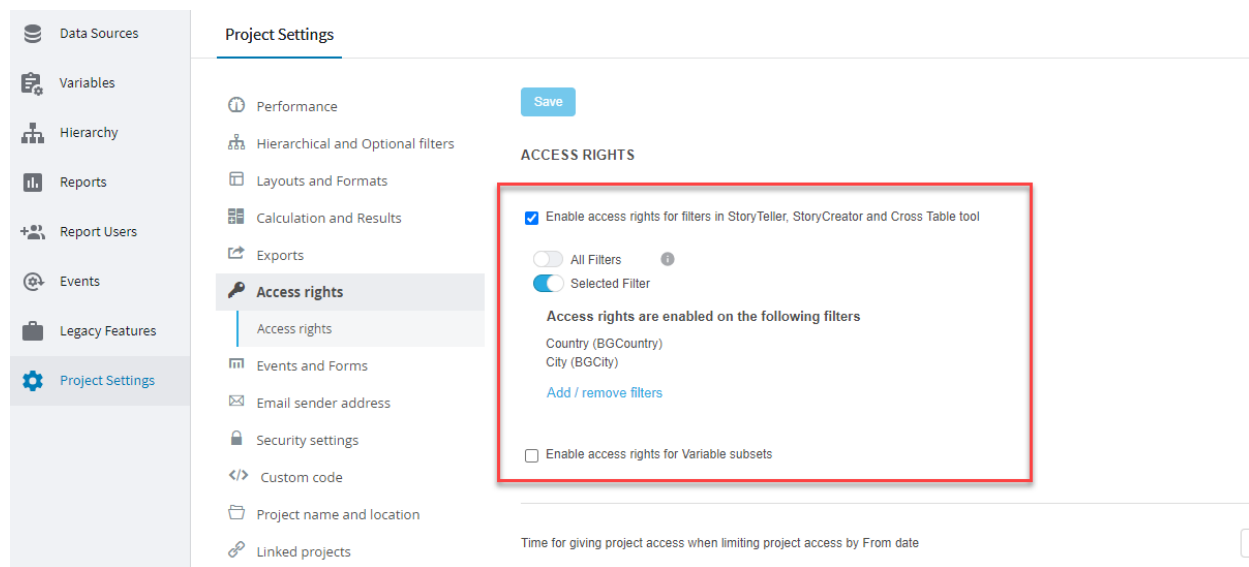
☒ Top

☐ Left

☐ Right

- Improved and streamlined Access rights setup for Filters and Variable subsets

As an administrator in Forsta Visualizations, you've had the ability to determine whether filters should be access-driven or not. However, until now, it has been an all-or-none situation. We've enhanced this functionality, allowing you to selectively assign access rights to specific filters. Additionally, we've introduced the capability to disable access rights for Variable Subsets.

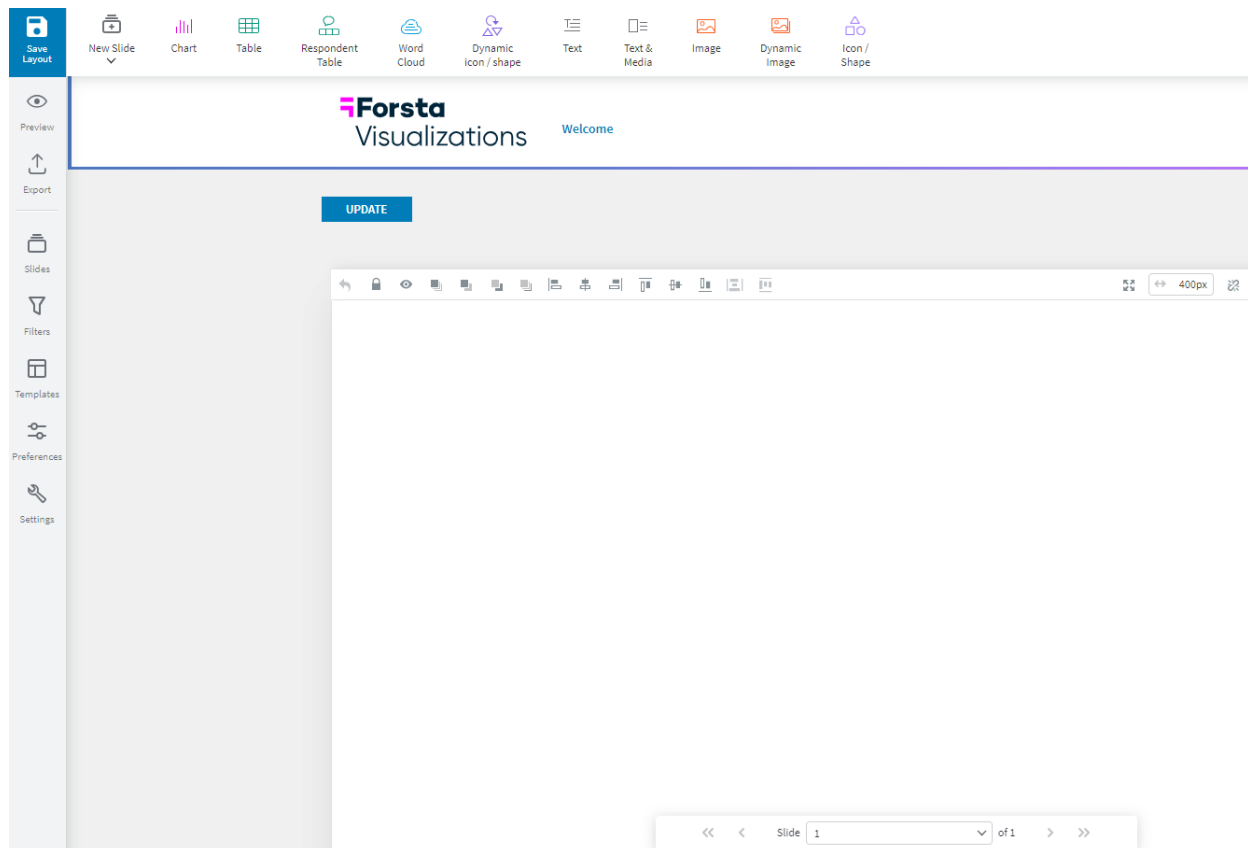


The screenshot displays the 'Project Settings' interface. On the left is a sidebar with navigation options: Data Sources, Variables, Hierarchy, Reports, Report Users, Events, Legacy Features, and Project Settings (highlighted). The main content area is titled 'Project Settings' and contains a list of settings: Performance, Hierarchical and Optional filters, Layouts and Formats, Calculation and Results, Exports, Access rights (highlighted), Events and Forms, Email sender address, Security settings, Custom code, Project name and location, and Linked projects. The 'Access rights' section is expanded, showing a 'Save' button and the 'ACCESS RIGHTS' panel. This panel has a checkbox 'Enable access rights for filters in StoryTeller, StoryCreator and Cross Table tool' which is checked. Below it are two radio buttons: 'All Filters' (unselected) and 'Selected Filter' (selected). A section titled 'Access rights are enabled on the following filters' lists 'Country (BGCountry)' and 'City (BGCity)', with a link 'Add / remove filters'. At the bottom of the panel is a checkbox 'Enable access rights for Variable subsets' which is unchecked.

3 StoryTeller

3.1 StoryTeller UI – Refreshed ribbon menu, slide panel and design toolbar – Feature toggle

A newly updated user interface (UI) has been rolled out, accessible via a feature toggle. This UI draws inspiration from the design principles employed in Forsta Visualizations project pages, where the toolbar resides on the left side. To create objects, simply click on the object located at the top. Additionally, the object icons have received a fresh update.





This new UI can be enabled per project under Project settings and Beta Settings.

Forsta HX Platform

Visualizations

New UI (815958)

Data Sources

Variables

Hierarchy

Reports

Report Users

Events

Legacy Features

Project Settings

Project Settings

Performance

Hierarchical and Optional filters

Layouts and Formats

Calculation and Results

Exports

Access rights

Events and Forms

Email sender address

Security settings

Custom code

Project name and location

Linked projects

Beta settings

Beta Settings

Save

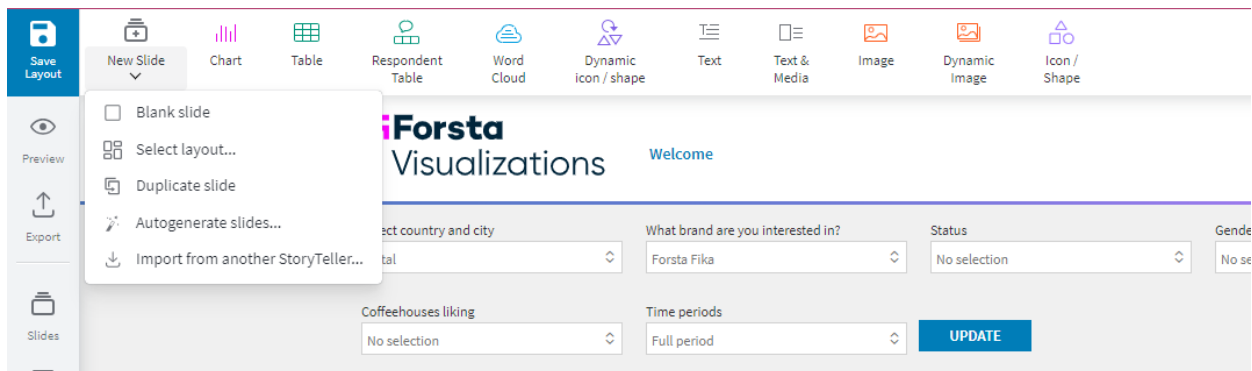
BETA SETTINGS

☒ Use new StoryTeller setup layout

The new StoryTeller setup user interface, currently under (Templates) to a left-hand side menu. The configuration of impact existing Report views.

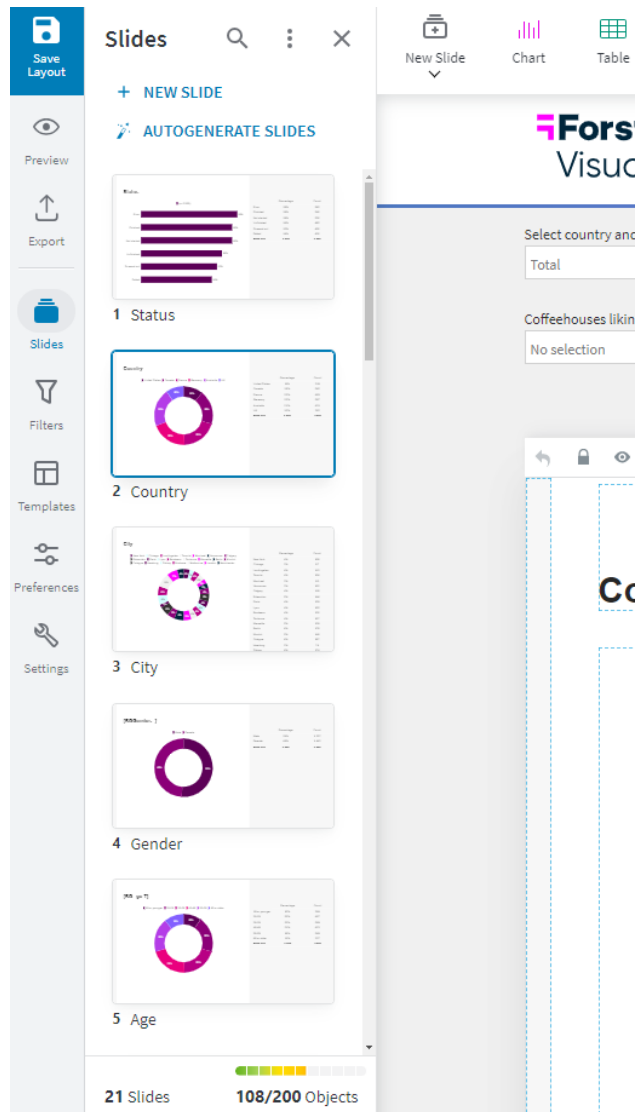
Top menu

The different object to insert onto a slide is placed at the top.



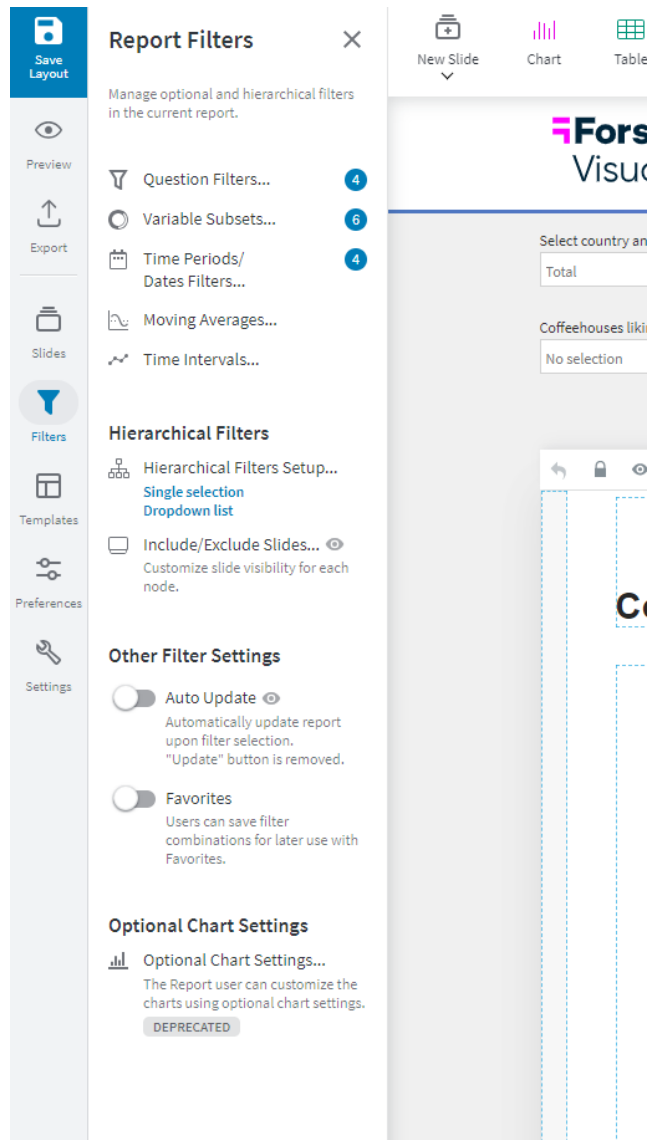
Slides

The slide menu is shown under Slides. At the bottom you also have number of slides and objects. At the top you can search for slide names, or use the three dots to work with slides, for example adding, deleting or rearranging them.



Filters

All options regarding overall filter settings for the report can be found here. We have also made it clear if any filters are in use without the need to enter the filter setup page.



Report Filters X

Manage optional and hierarchical filters in the current report.

Question Filters... 4

Variable Subsets... 6

Time Periods/Dates Filters... 4

Moving Averages...

Time Intervals...

Hierarchical Filters

Hierarchical Filters Setup...

Single selection
Dropdown list

Include/Exclude Slides...

Customize slide visibility for each node.

Other Filter Settings

Auto Update

Automatically update report upon filter selection. "Update" button is removed.

Favorites

Users can save filter combinations for later use with Favorites.

Optional Chart Settings

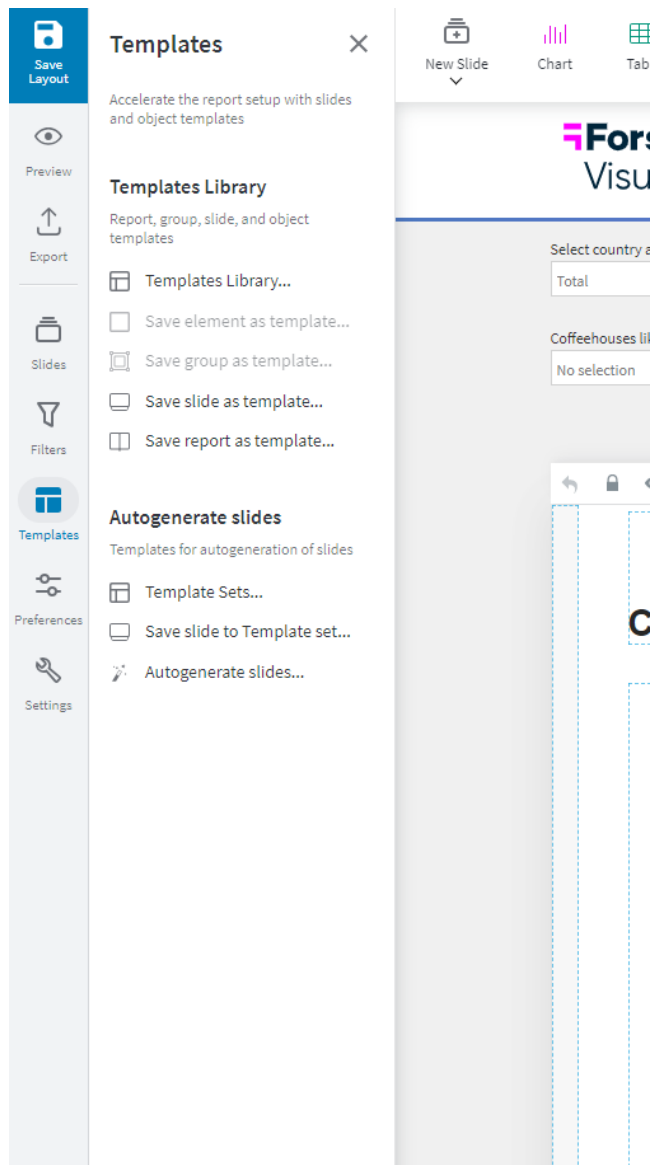
Optional Chart Settings...

The Report user can customize the charts using optional chart settings.

DEPRECATED

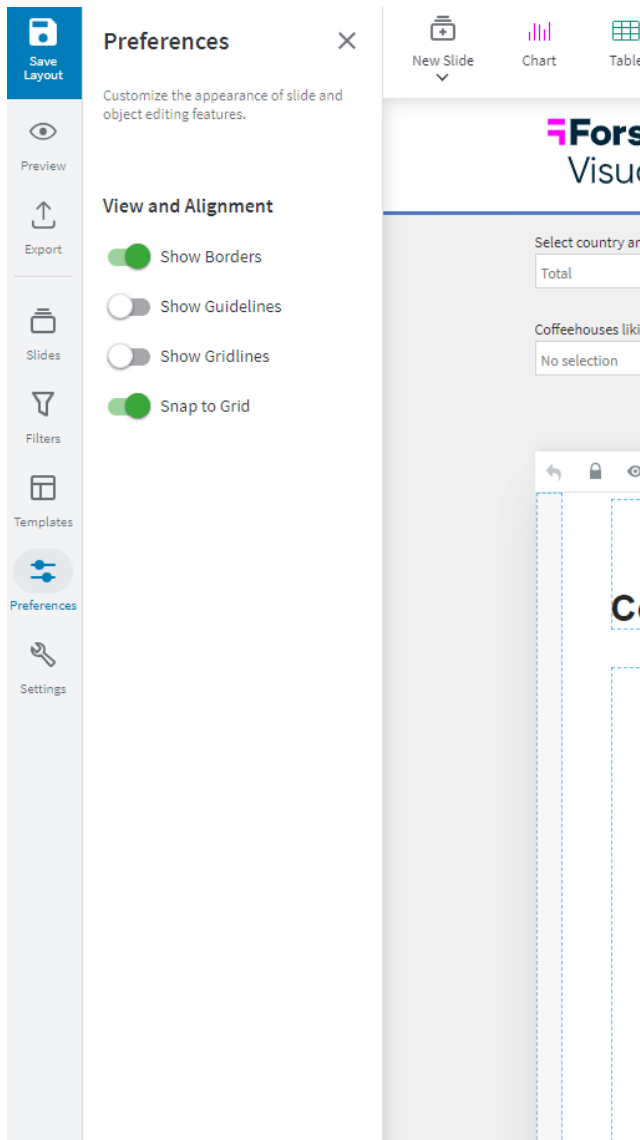
Templates

All templates, both layout templates and template sets used in “Autogenerate slides”, are placed here.



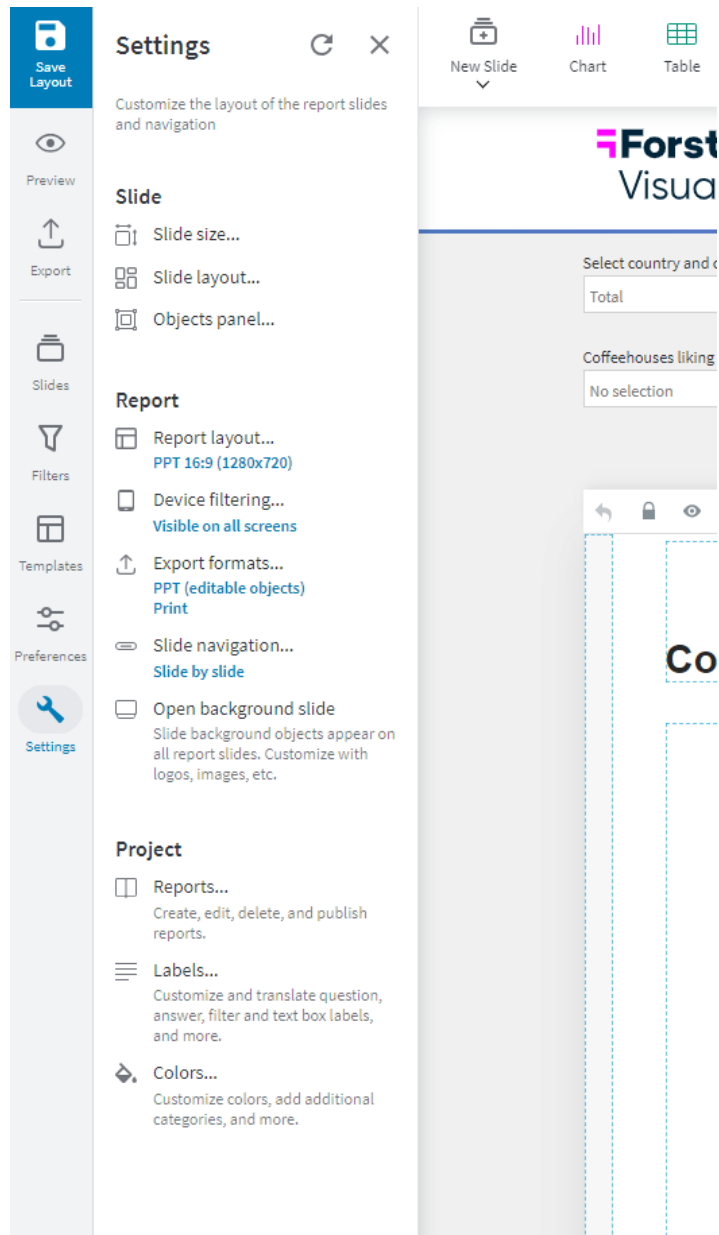
Preferences

Options for slide and object appearance can be found here.



Settings

All report settings, such as slide size, what export options should be enabled, and labels and colors can be found here.



The screenshot shows the 'Settings' window in the Forsta Visual application. The window has a sidebar on the left with icons for 'Save Layout', 'Preview', 'Export', 'Slides', 'Filters', 'Templates', 'Preferences', and 'Settings' (which is highlighted). The main area is titled 'Settings' and contains three sections: 'Slide', 'Report', and 'Project'.

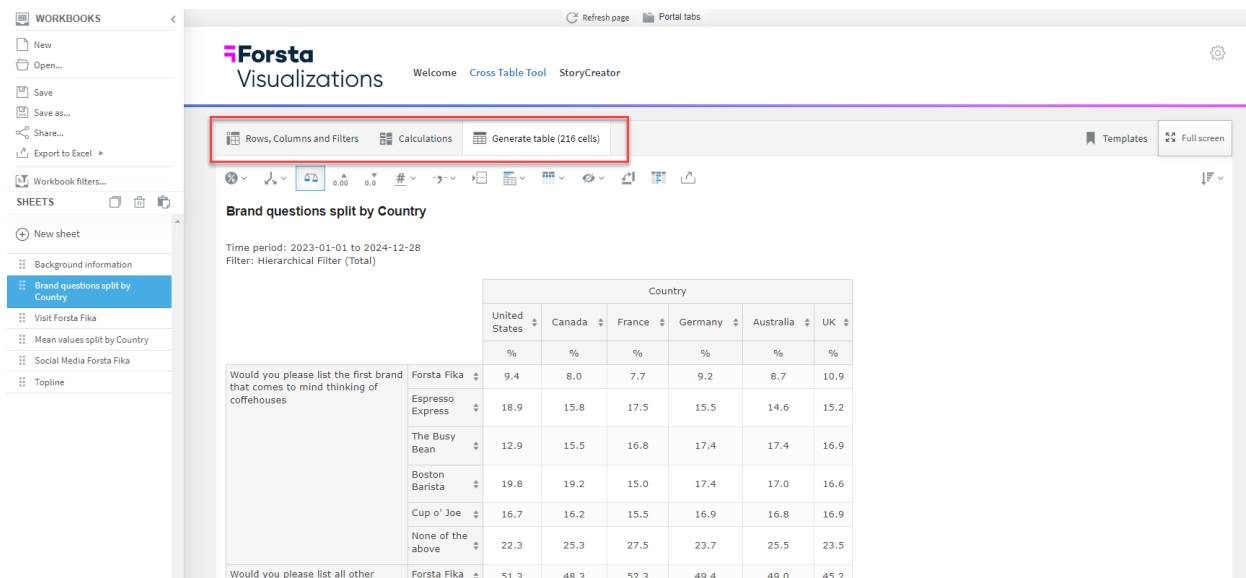
- Slide Section:**
 - Slide size...
 - Slide layout...
 - Objects panel...
- Report Section:**
 - Report layout... (PPT 16:9 (1280x720))
 - Device filtering... (Visible on all screens)
 - Export formats... (PPT (editable objects), Print)
 - Slide navigation... (Slide by slide)
 - Open background slide (Slide background objects appear on all report slides. Customize with logos, images, etc.)
- Project Section:**
 - Reports... (Create, edit, delete, and publish reports.)
 - Labels... (Customize and translate question, answer, filter and text box labels, and more.)
 - Colors... (Customize colors, add additional categories, and more.)

The background of the application shows a report slide with the Forsta Visual logo, a 'Select country and c' dropdown, a 'Total' label, a 'Coffeehouses liking' label, and a 'No selection' message. A dashed blue box highlights a 'Co' label on the slide.

4 CrossTable tool

4.1 Optimizations on loading Workbooks

To enhance workbook loading speed, we've introduced several optimizations. When navigating between "Row, Columns, and Filters," "Calculation," and "Generate table," the system now refrains from recalculating the table unless specific changes have been applied.



Forsta Visualizations | Welcome | Cross Table Tool | StoryCreator

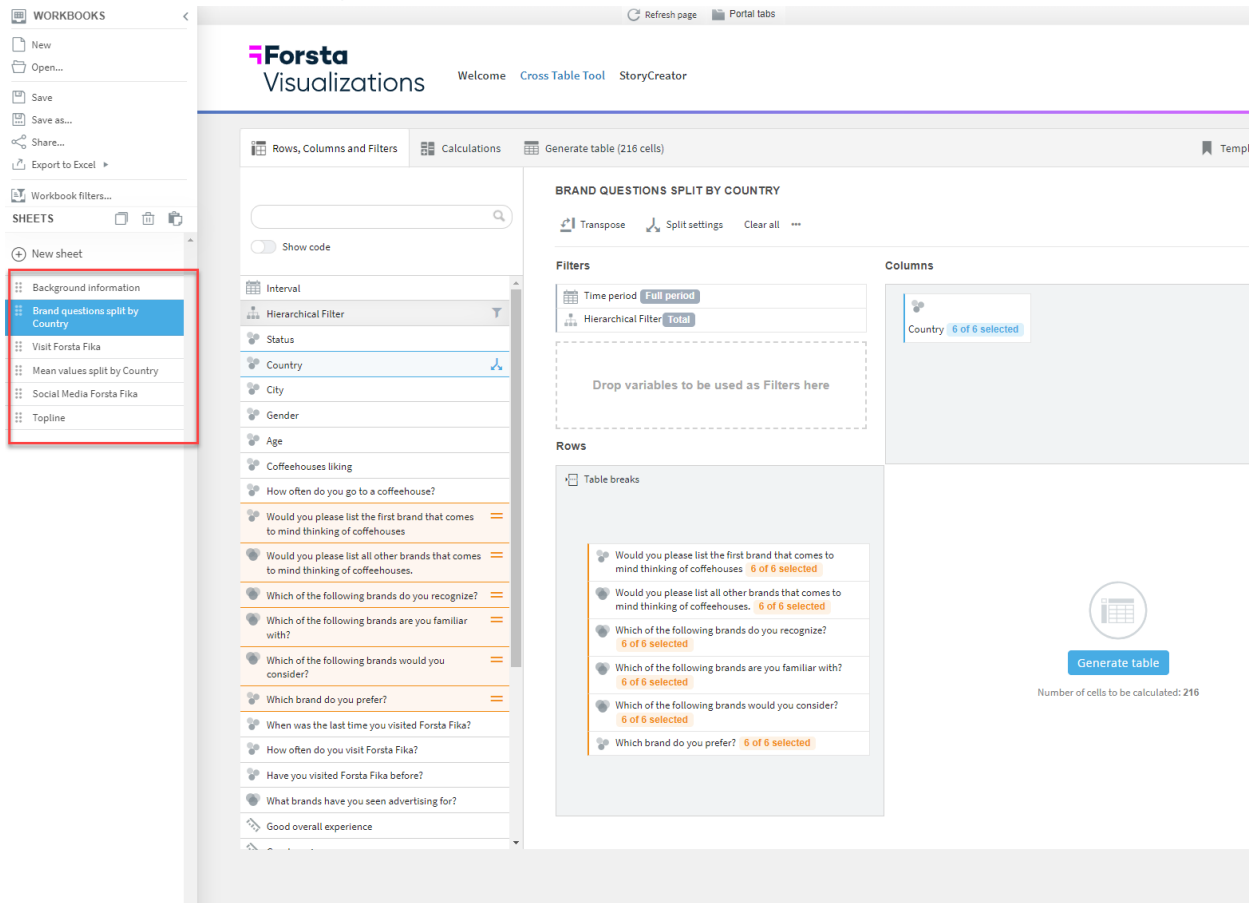
Rows, Columns and Filters | Calculations | **Generate table (216 cells)** | Templates | Full screen

Brand questions split by Country

Time period: 2023-01-01 to 2024-12-28
Filter: Hierarchical Filter (Total)

		Country					
		United States	Canada	France	Germany	Australia	UK
Would you please list the first brand that comes to mind thinking of coffeehouses		%	%	%	%	%	%
Forsta Fika		9.4	8.0	7.7	9.2	8.7	10.9
Espresso Express		18.9	15.8	17.5	15.5	14.6	15.2
The Busy Bean		12.9	15.5	16.8	17.4	17.4	16.9
Boston Barista		19.8	19.2	15.0	17.4	17.0	16.6
Cup o' Joe		16.7	16.2	15.5	16.9	16.8	16.9
None of the above		22.3	25.3	27.5	23.7	25.5	23.5
Would you please list all other	Forsta Fika	51.3	48.3	52.3	49.4	49.0	45.2

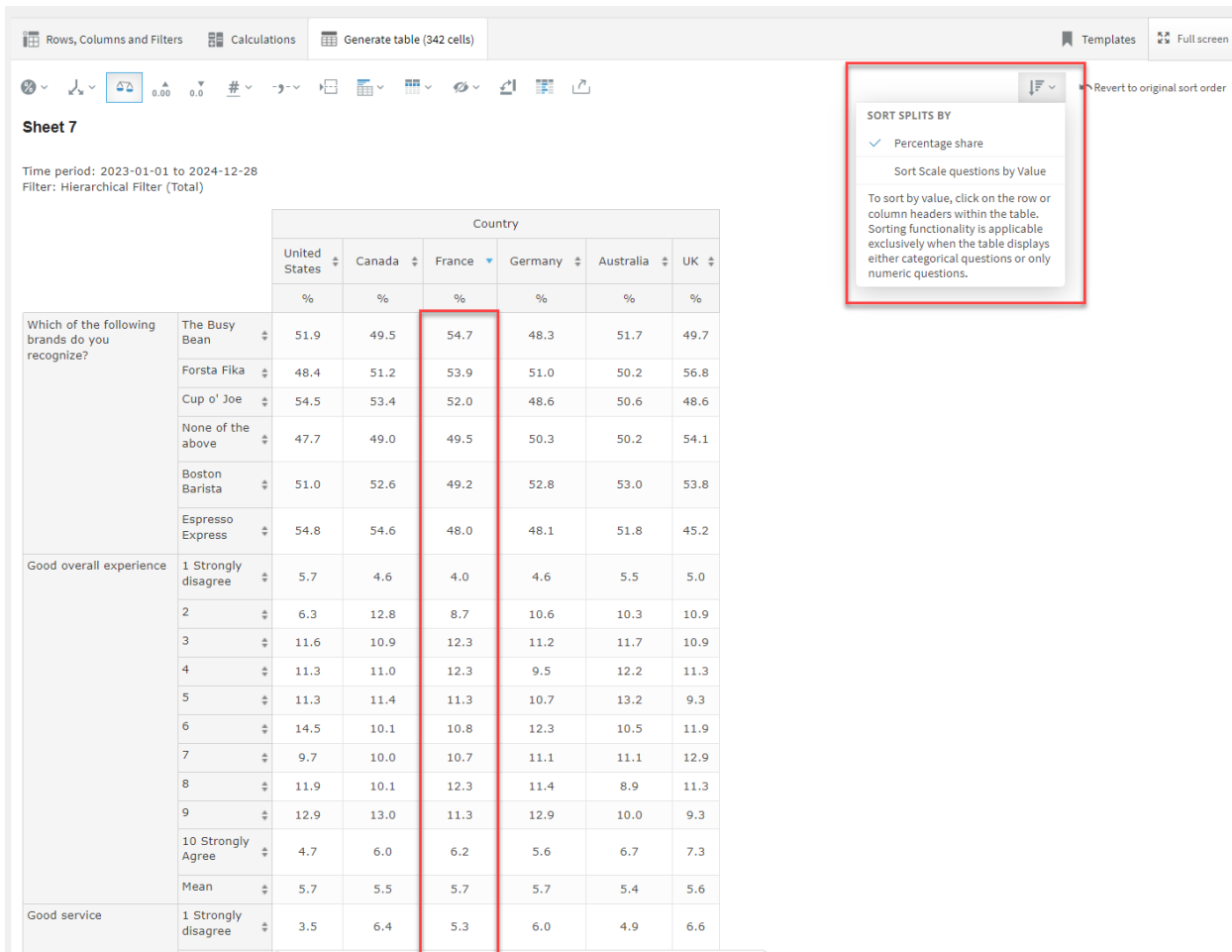
Similarly, we've extended this improvement to the loading process of Questions and Answers while switching between sheets within your workbook.



The screenshot displays the Forsta Visualizations interface. On the left, the 'SHEETS' sidebar is visible, with a red box highlighting the 'Brand questions split by Country' sheet. The main workspace shows the 'BRAND QUESTIONS SPLIT BY COUNTRY' visualization. The 'Filters' section includes 'Time period' (Full period) and 'Hierarchical Filter' (Total). The 'Columns' section shows 'Country' (6 of 6 selected). The 'Rows' section displays a list of questions with their respective selection counts (e.g., 'Would you please list the first brand that comes to mind thinking of coffeehouses' - 6 of 6 selected). A 'Generate table' button is located at the bottom right, with a note indicating 'Number of cells to be calculated: 216'.

4.2 Option to exclude Scale questions for value sorting

We've introduced a new feature that allows you to selectively include or exclude scale questions when sorting by percentage or count. This functionality is now the default setting for all new workbooks. You can access it through the new sorting icon located in the upper right corner of the CrossTable tool.



The screenshot shows the Forsta CrossTable tool interface. The top bar includes tabs for "Rows, Columns and Filters", "Calculations", and "Generate table (342 cells)". The right side has "Templates" and "Full screen" buttons. Below the top bar is a toolbar with various icons. The main area displays "Sheet 7" with a time period of "2023-01-01 to 2024-12-28" and a filter of "Hierarchical Filter (Total)".

The table has a column for "Country" with sub-columns for "United States", "Canada", "France", "Germany", "Australia", and "UK". Each sub-column has a percentage icon. The table rows include questions like "Which of the following brands do you recognize?" and "Good overall experience".

A sorting menu is open in the upper right corner, titled "SORT SPLITS BY". It has two options: "Percentage share" (selected) and "Sort Scale questions by Value". Below these options is a note: "To sort by value, click on the row or column headers within the table. Sorting functionality is applicable exclusively when the table displays either categorical questions or only numeric questions."

		Country					
		United States	Canada	France	Germany	Australia	UK
		%	%	%	%	%	%
Which of the following brands do you recognize?	The Busy Bean	51.9	49.5	54.7	48.3	51.7	49.7
	Forsta Fika	48.4	51.2	53.9	51.0	50.2	56.8
	Cup o' Joe	54.5	53.4	52.0	48.6	50.6	48.6
	None of the above	47.7	49.0	49.5	50.3	50.2	54.1
	Boston Barista	51.0	52.6	49.2	52.8	53.0	53.8
	Espresso Express	54.8	54.6	48.0	48.1	51.8	45.2
Good overall experience	1 Strongly disagree	5.7	4.6	4.0	4.6	5.5	5.0
	2	6.3	12.8	8.7	10.6	10.3	10.9
	3	11.6	10.9	12.3	11.2	11.7	10.9
	4	11.3	11.0	12.3	9.5	12.2	11.3
	5	11.3	11.4	11.3	10.7	13.2	9.3
	6	14.5	10.1	10.8	12.3	10.5	11.9
	7	9.7	10.0	10.7	11.1	11.1	12.9
	8	11.9	10.1	12.3	11.4	8.9	11.3
	9	12.9	13.0	11.3	12.9	10.0	9.3
	10 Strongly Agree	4.7	6.0	6.2	5.6	6.7	7.3
	Mean	5.7	5.5	5.7	5.7	5.4	5.6
Good service	1 Strongly disagree	3.5	6.4	5.3	6.0	4.9	6.6

NOTE!

All existing saved workbooks will still use the same logic as before, eg, will sort scale questions.

This additional feature will be accessible exclusively when you've chosen categorical questions. However, it will be deactivated if sorting is based on mean or standard deviation calculations.

Rows, Columns and Filters Calculations Generate table (804 cells) Templates Full screen

0.00 0.0 # -9-~

Sheet 7

Time period: 2023-01-01 to 2024-12-28
Filter: Hierarchical Filter (Total)

		Country					
		United States	Canada	France	Germany	Australia	UK
		Count	Count	Count	Count	Count	Count
Good overall experience	1 Strongly disagree	18.0	26.0	24.0	27.0	35.0	15.0
	2	20.0	72.0	52.0	62.0	65.0	33.0
	3	37.0	61.0	74.0	66.0	74.0	33.0
	4	36.0	62.0	74.0	56.0	77.0	34.0
	5	36.0	64.0	68.0	63.0	83.0	28.0
	6	46.0	57.0	65.0	72.0	66.0	36.0
	7	31.0	56.0	64.0	65.0	70.0	39.0
	8	38.0	57.0	74.0	67.0	56.0	34.0
	9	41.0	73.0	68.0	76.0	63.0	28.0
	10 Strongly Agree	15.0	34.0	37.0	33.0	42.0	22.0
	Mean	5.7	5.5	5.7	5.7	5.4	5.6
	Standard deviation	2.5	2.7	2.6	2.6	2.6	2.6
Good service	1 Strongly disagree	11.0	36.0	32.0	35.0	31.0	20.0
	2	28.0	52.0	67.0	57.0	66.0	32.0
	3	37.0	64.0	72.0	66.0	69.0	39.0

SORT SPLITS BY

- ✓ Mean
- Standard Deviation
- Count
- Sort Scale questions by Value

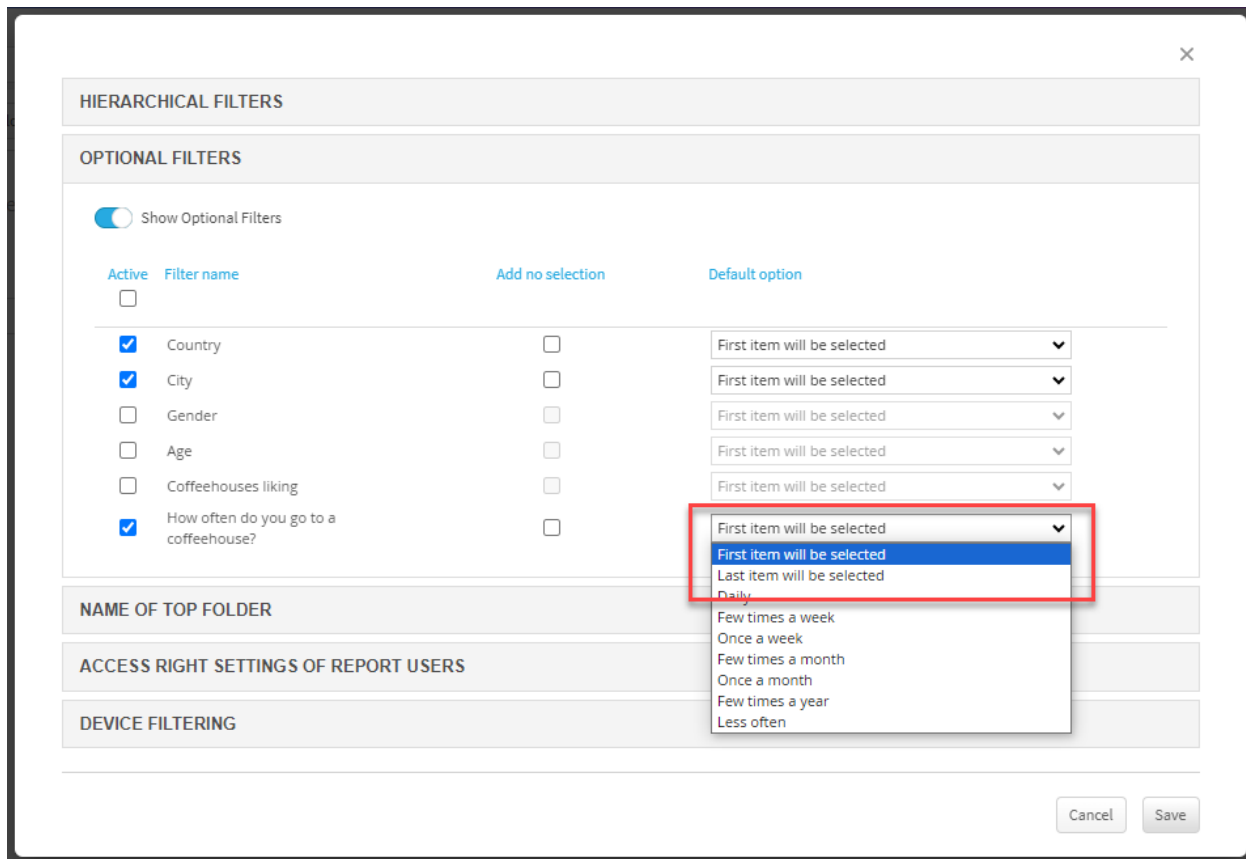
To sort by value, click on the row or column headers within the table. Sorting functionality is applicable exclusively when the table displays either categorical questions or only numeric questions.

Revert to original sort order

5 Document Archive

5.1 Additional filter options added to Document Archive

To streamline all filter options among the report types, the option “First/Last item will be selected” can now be the default filter options within Document Archive.



The screenshot shows a dialog box titled "HIERARCHICAL FILTERS" with a close button (X) in the top right corner. Below the title bar is a section labeled "OPTIONAL FILTERS" which contains a toggle switch labeled "Show Optional Filters" that is currently turned on. Below this is a table with four columns: "Active", "Filter name", "Add no selection", and "Default option".

Active	Filter name	Add no selection	Default option
<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Country	<input type="checkbox"/>	First item will be selected
<input checked="" type="checkbox"/>	City	<input type="checkbox"/>	First item will be selected
<input type="checkbox"/>	Gender	<input type="checkbox"/>	First item will be selected
<input type="checkbox"/>	Age	<input type="checkbox"/>	First item will be selected
<input type="checkbox"/>	Coffeehouses liking	<input type="checkbox"/>	First item will be selected
<input checked="" type="checkbox"/>	How often do you go to a coffeehouse?	<input type="checkbox"/>	First item will be selected

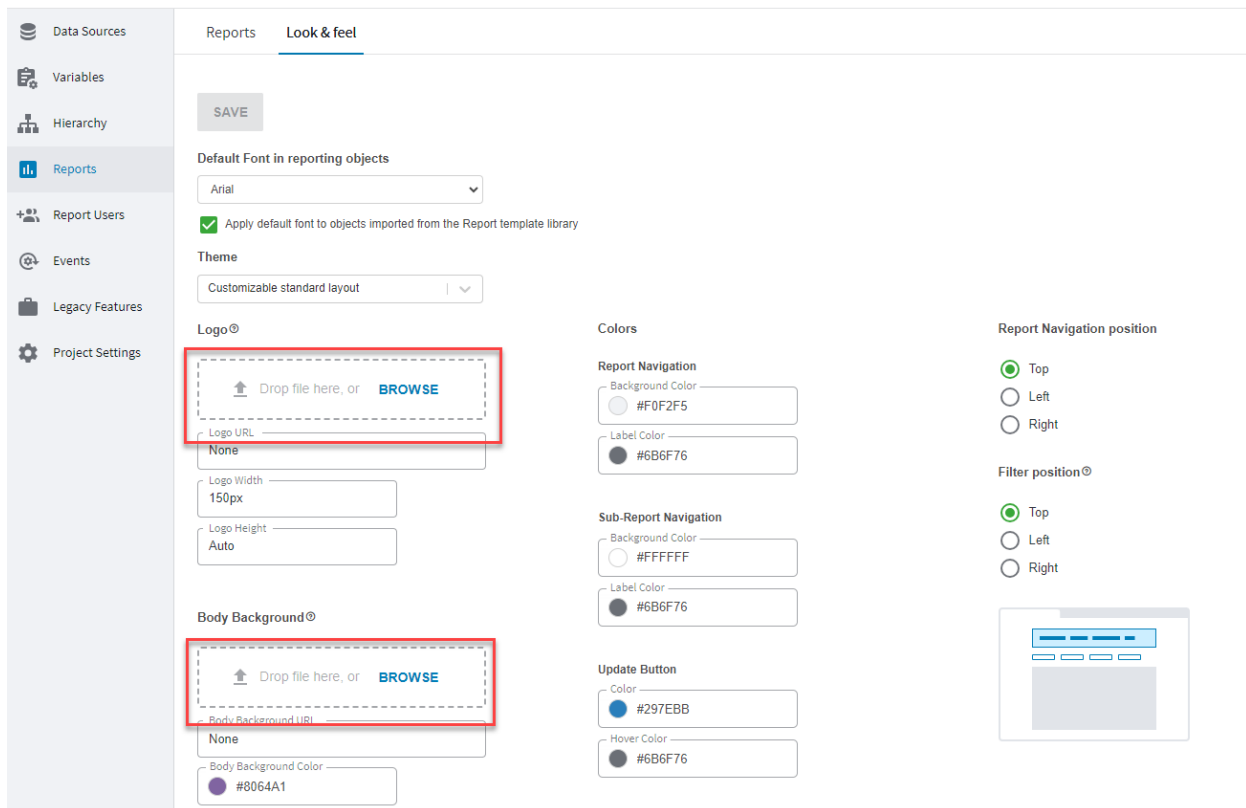
The "Default option" column for the last row is highlighted with a red box, and a dropdown menu is open showing the following options: "First item will be selected" (highlighted in blue), "Last item will be selected", "Daily", "Few times a week", "Once a week", "Few times a month", "Once a month", "Few times a year", and "Less often".

Below the table are four sections: "NAME OF TOP FOLDER", "ACCESS RIGHT SETTINGS OF REPORT USERS", "DEVICE FILTERING", and "Cancel" and "Save" buttons at the bottom right.

6 Project administration

6.1 Theming tool - Upload logo and background image

In our theming tool, we've introduced an option to directly upload logos and background images from your own storage, rather than restricting them to external URLs only.



SAVE

Look & feel

Default Font in reporting objects

Arial

☒ Apply default font to objects imported from the Report template library

Theme

Customizable standard layout

Logo®

Drop file here, or **BROWSE**

Logo URL

None

Logo Width

150px

Logo Height

Auto

Body Background®

Drop file here, or **BROWSE**

Body Background URI

None

Body Background Color

#8064A1

Colors

Report Navigation

Background Color

#F0F2F5

Label Color

#6B6F76

Sub-Report Navigation

Background Color

#FFFFFF

Label Color

#6B6F76

Update Button

Color

#297EBB

Hover Color

#6B6F76

Report Navigation position

☒ Top

☐ Left


☐ Right

Filter position®

☒ Top

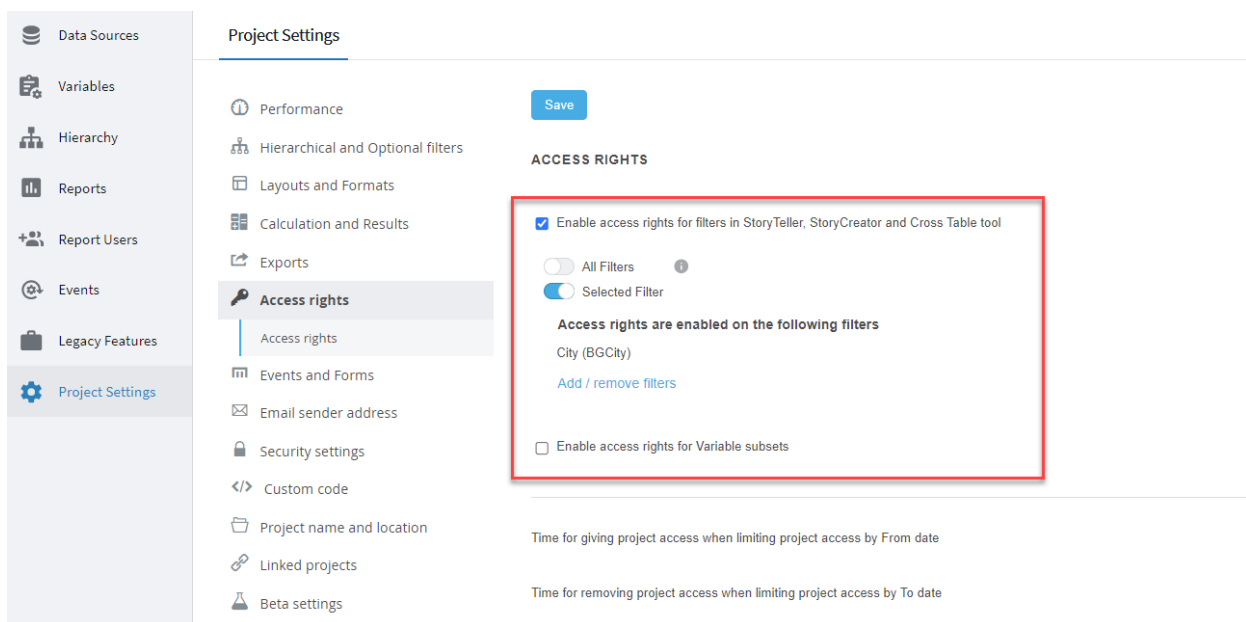
☐ Left

☐ Right



6.2 Streamlining Access Rights Setup and Maintenance for Report Users

As an administrator in Forsta Visualizations, you've had the ability to determine whether filters should be access-driven or not. However, until now, it has been an all-or-none situation. We've enhanced this functionality, allowing you to selectively assign access rights to specific filters. Additionally, we've introduced the capability to disable access rights for Variable Subsets.



Logic for Variable Subsets

Under Access Rights, we've added the option to enable or disable access rights for Variable Subsets. If access rights for Variable Subsets is enabled, the project will behave just as before, and for all existing projects, this functionality will be enabled. For newly created projects, this functionality will be disabled by default.

Logic for filter

Access Rights on filters will be displayed as two options: "All Filters" or "Selected Filters." If "All Filters" is selected, the logic remains as before, and this option applies to all existing projects with access rights on filters. If only a specific filter should be access-driven, choose "Selected Filters" and specify the filter under "Add/Remove Filters."

All Filters:

All filters are access-right driven and displayed in pages for managing access rights of Report users, including Excel templates for bulk create/edit of Report users.

When new filters are added, existing Report users have no access to the Filter answers by default.

Selected Filters:

Choose specific filters to be access-right driven. Only the selected filters are displayed in pages for managing access rights of Report users, including Excel templates for bulk create/edit of Report users.

If a filter is used for setting access rights, and you deselect the filter, all existing access rights on that filter will be cleared. If you later re-enable access to the same filter, you have to redefine individual access rights.

NOTE!

Switching from "All Filters" to "Selected Filters" retains access rights for filters that are still access-right driven.

Switching from "Selected Filters" to "All Filters" retains access rights on filters used for setting access rights. For all other filters, users get access to all filter options by default.

If the option "Enable access rights for filters in StoryTeller, StoryCreator, and Cross Table tool" is deselected, existing access rights are retained but not in use. If you later re-enable this option, there is no need to redefine individual access rights.