

Forsta Visualizations January 2023 Release



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1 Introduction

This document describes new and improved features in the Forsta Visualizations 2023 January 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

Cross Table tool

- In the Cross table tool you can now show the question-and-answer codes in the result tables to provide more context and make it easier to locate items. The codes are shown both online and in tables exported to Excel.

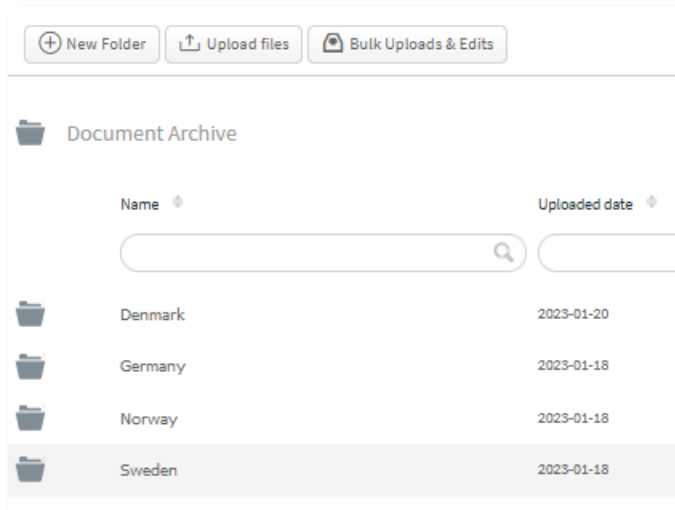
Example of table with Question codes enabled: Q12, Q13 and Q3, Q5 are shown as prefixes to the question labels.

		Q3 - Gender		Q5 - Age group					
		Man †	Woman †	15-24 †	25-34 †	35-44 †	45-54 †	55-64 †	65 + †
		%	%	%	%	%	%	%	%
Q12 - Spontaneous brand awareness - Top of mind	Four †	4.1	6.4	4.6	5.0	6.0	5.8	3.5	6.5
	Swedish Telecom †	7.9	5.4	11.1	1.1	7.5	9.2	5.6	6.0
	Sweet Talk †	10.3	15.8	9.4	18.3	12.4	12.8	15.5	9.7
	Telecom for You †	9.2	7.0	7.3	8.4	7.3	9.9	9.0	6.9
	Duty Calls †	5.4	9.3	6.9	13.1	4.7	3.6	5.1	10.5
	Tel Me More †	12.0	6.7	13.0	9.0	7.7	8.8	8.2	9.8
Q13 - Spontaneous brand awareness - In mind	Four †	51.1	49.6	56.2	53.8	51.0	47.1	47.2	46.8
	Swedish Telecom †	53.2	47.4	39.2	53.4	51.2	47.8	52.0	56.6
	Sweet Talk †	50.4	47.8	59.8	43.0	48.2	43.5	47.2	54.6

Document archive

- In the Document archive the Report users can now be given access to manage both folders and documents, previously the Report users could get access to manage documents only. Allowing Report users to manage the folders is optional, and not applied by default to existing projects.

Here we see example of a folder structure in a Document archive report which now can be managed by the Report users.



Project Administration

- Deactivating answers, which for example is used to hide non-valid answers such as "Unknown" or "No answer" from the Crosstab tool, was previously a question-level setting, but now it can be done on an answer block level. This allows you to deactivate an answer for all questions connected to that answer block, saving time in many cases.
- When downloading the meta data to Excel, for making label updates outside the system which then can be imported back, a new column shows the imported answer id in the Answer block sheet which makes it easier to locate the desired answer options.

Report user management

- In closed loop/case management process in CX programs, it is common to use a categorical input variable with an answer alternative for each report user in the



project. This input variable can be used for assigning cases to users, in alert filtering, and as an optional filter in StoryTeller reports. Often, the access rights to the different answer options (the different report users) need to be limited so each user gets access to their own user only. The flow and process for giving users access to their own user has been improved to be more efficient.

Data exports

- Looped/stacked data can now be included in raw data exports to SPSS .SAV files. Each loop is exported in a separate file.



3 Cross table tool

3.1 Show Question and Answer codes in table

In the Cross table tool, you can now show the question-and-answer codes in the result tables to provide more context and make it easier to locate items. The codes are shown both online and in tables exported to Excel.

Example of table with Question codes enabled: Q12, Q13 and Q3, Q5 are shown as prefixes to the question labels.

		Q3 - Gender		Q5 - Age group					
		Man	Woman	15-24	25-34	35-44	45-54	55-64	65 +
		%	%	%	%	%	%	%	%
Q12 - Spontaneous brand awareness - Top of mind	Four	4.1	6.4	4.6	5.0	6.0	5.8	3.5	6.5
	Swedish Telecom	7.9	5.4	11.1	1.1	7.5	9.2	5.6	6.0
	Sweet Talk	10.3	15.8	9.4	18.3	12.4	12.8	15.5	9.7
	Telecom for You	9.2	7.0	7.3	8.4	7.3	9.9	9.0	6.9
	Duty Calls	5.4	9.3	6.9	13.1	4.7	3.6	5.1	10.5
	Tel Me More	12.0	6.7	13.0	9.0	7.7	8.8	8.2	9.8
Q13 - Spontaneous brand awareness - In mind	Four	51.1	49.6	56.2	53.8	51.0	47.1	47.2	46.8
	Swedish Telecom	53.2	47.4	39.2	53.4	51.2	47.8	52.0	56.6
	Sweet Talk	50.4	47.8	59.8	43.0	48.2	43.5	47.2	54.6
	Telecom								

To show the question and/or answer codes in the tables use the new toggles in the Displayed labels panel shown below.



Rows, Columns and Filters | Calculations | General | **Displayed labels**

DISPLAYED LABELS

- Question text
- Split Question text
- Question code
- Answer code

Sheet 1

Time period: 2020-01-01 to 2020-02-27

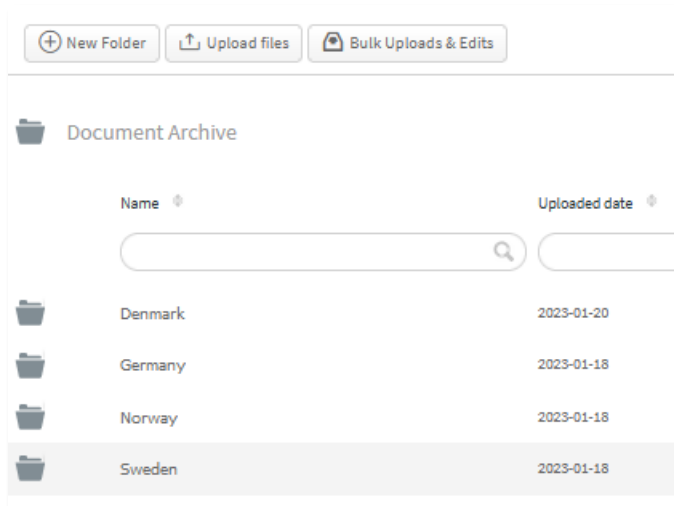
		Q3 - Gender							
		Man	Woman	15-24	25-34	35-44	45-54	55-64	65 +
		%	%	%	%	%	%	%	%
Q12 - Spontaneous brand awareness - Top of mind	Four	4.1	6.4	4.6	5.0	6.0	5.8	3.5	6.5
	Swedish								

4 Document Archive

4.1 Folder management by Report users

In the Document archive the Report users can now be given access to manage both folders and documents, previously the Report users could get access to manage documents only.

Here we see example of a folder structure in a Document archive report which now can be managed by the Report users.



Report users with access to manage the folders can:

- Create a new folder
- edit name of folder
- move a folder
- delete a folder

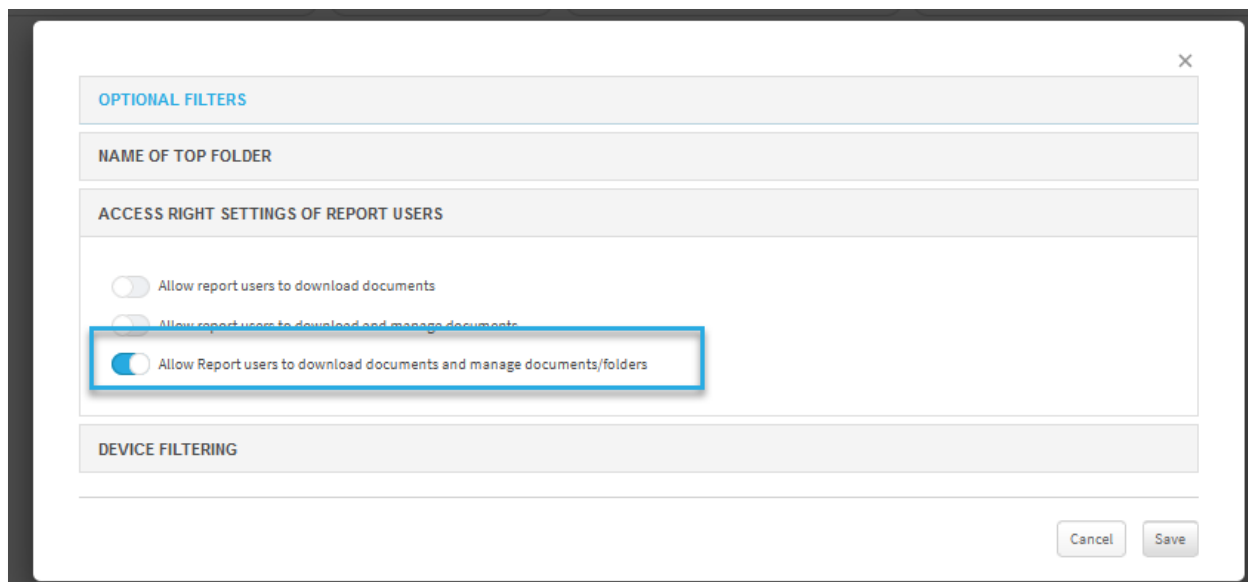
Note: when an Administrator user manages folders a folder can be set to distributed/undistributed. Report users sees Distributed folders only. When a Report user creates a new folder, it is set to distributed by default. The



distribute/undistribute options are not shown for Report users and they can only managed distributed folders.

To give the Report users the ability to manage both folders and documents enable the new setting shown below.

New setting in Document archive setup.

A screenshot of a 'Document archive setup' dialog box. The dialog has a title bar with a close button (X) in the top right corner. It is divided into several sections: 'OPTIONAL FILTERS', 'NAME OF TOP FOLDER', 'ACCESS RIGHT SETTINGS OF REPORT USERS', and 'DEVICE FILTERING'. The 'ACCESS RIGHT SETTINGS OF REPORT USERS' section contains three toggle switches. The first two are disabled (greyed out). The third toggle switch, labeled 'Allow Report users to download documents and manage documents/folders', is enabled (blue) and is highlighted with a blue rectangular box. At the bottom right of the dialog, there are 'Cancel' and 'Save' buttons.

5 Project Administration

5.1 Deactivate answers on Answer block level

Deactivating answers, which for example is used to hide non-valid answers such as “Unknown”/”No answer” from the Crosstab tool, was previously a question level setting but now you can choose to deactivate an answer on an Answer block level instead. When deactivating an answer, on answer block level, it becomes inactive for all questions connected to the answer block which is a huge time saver in many use cases.

Here we see the new option for deactivating answers on Answer block level. “Don’t know” is inactive for all questions connected to the shown answer block.

Answer Block 1 Not at all likely/2/3

Cons.4 - Brand Consideration - Sweet Talk

Save Create grouped answer Apply Color Template View questions connected to this Answer block

Activate/deactivate answers:

- Question level
- Answer block level

The activated/inactivated settings are applied to all questions sharing this answer block.

ORDER	ANSWER TEXT	ID	COLOR	EXCLUDE AVERAGE	FACTOR AVERAGE	EXCLUDE FROM PERCENTAGE	VALUE SORTING	ACTIVE+
1	1 Not at all likely	1	Orange	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Sortable group 1	<input checked="" type="checkbox"/>
2	2	2	Orange	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Sortable group 1	<input checked="" type="checkbox"/>
3	3	3	Yellow	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Sortable group 1	<input checked="" type="checkbox"/>
4	4	4	Green	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Sortable group 1	<input checked="" type="checkbox"/>
5	5 Very likely	5	Dark Green	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Sortable group 1	<input checked="" type="checkbox"/>
6	Don't know	6	Grey	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	Sortable group 1	<input checked="" type="checkbox"/>

5.2 Download upload meta data updates

When downloading the meta data to Excel, for making label updates outside the system which then can be imported back, a new column shows the imported answer id in the Answer block sheet which makes it easier to locate the desired answer options.

Here we see the imported answer id in column B.



	A	B	C
1	AnswerID	AnswerID_imported	AnswerBlockNam
2			
3	91	1	Dapresy Telecom/Four/Swedish Telecom
4	92	2	Dapresy Telecom/Four/Swedish Telecom
5	93	3	Dapresy Telecom/Four/Swedish Telecom
6	94	4	Dapresy Telecom/Four/Swedish Telecom
7	95	5	Dapresy Telecom/Four/Swedish Telecom
8	96	6	Dapresy Telecom/Four/Swedish Telecom
9	97	7	Dapresy Telecom/Four/Swedish Telecom
10	98	8	Dapresy Telecom/Four/Swedish Telecom
11	99	9	Dapresy Telecom/Four/Swedish Telecom
12	100	10	Dapresy Telecom/Four/Swedish Telecom
13	101	11	Dapresy Telecom/Four/Swedish Telecom
14	102	12	Dapresy Telecom/Four/Swedish Telecom
15	111	1	Prepaid/Postpaid
16	112	2	Prepaid/Postpaid

Question AnswerBlock

Klar Tillgänglighet: Klar Antal: 2



6 Report user management

6.1 Enfesys, improved flow for setting access to “own” user in user filter

In the closed loop/case management process, in CX programs, it is common to use a categorical Input variable with an answer alternative for each of the Report users in the project. This Input variable can be used for assigning cases to users, in the alert filtering and as an optional filter in the StoryTeller reports. Often the access rights to the different answer options (the different Report users) needs to be limited so each user gets access to their “own” user only.

When new users are added via Excel upload you could previously not give the new users access to their “own” user in the initial upload as the filter options (the users) were not present until after the users were created (after the upload) so the process contained multiple steps.

The flow for giving users, uploaded in Excel files, access to their “own” answer option is now improved and more efficient. By using the tag “own_user” (see images further down) the user will get access to their “own” answer option automatically even if the user is new. The new “own_user” tag can be used on both new and existing users in the Excel upload of users.

Below we see an example: First image shows the how the new tag “own_user” is added in the “user” filter column in the uploaded Excel file. Second image shows an example of the result after upload, the user Rudy Bown got access to his own user in the User filter.

	A	T	U	V	W
1					Filters
2	User name	rchive	14 - Cross Table tool	Q5 - User	Q6 - Country
3	Anna Carlsson@forsta.com	Access	0 --First Report--	own_user	No Acc
4	Kristin Svensson@forsta.com	Access	0 --First Report--	own_user	1 No Acc
5	Nils Sten@forsta.com	No Access	0 --First Report--	own_user	1 No Acc
6	Rudy Brown@forsta.com	Access	0 --First Report--	own_user	2 No Acc
7	Steven Smith@forsta.com	No Access	0 --First Report--	own_user	2 No Acc
8	Thomas Andersson@forsta.com	No Access	0 --First Report--	own_user	1 No Acc
9	Tim Jones@forsta.com	Access	0 --First Report--	own_user	3 No Acc



USER DETAILS

User name (ID for Single sign-on) Rudy.Brown@forsta.com	Email Rudy.Brown@forsta.com
First Name Rudy	Last Name Brown
Password	Confirm Password

* if left empty user will have to create password before accessing the system

Tags (Optional)

Dates for project access

Set dates for project access

Allowed login methods

Login page
 Single Sign-On

† Enabling Single sign on requires there to be a SSO solution in place. If your system is configured with a single sign on solution and you do not want users to have the option to log in with a password then disable 'Login Page'. This will prevent users logging in without using the SSO, for instance if they leave the organization. Disabling 'Login Page' when there is no SSO will mean the user can not log in at all

REPORTS

VARIABLE SUBSETS

FILTERS

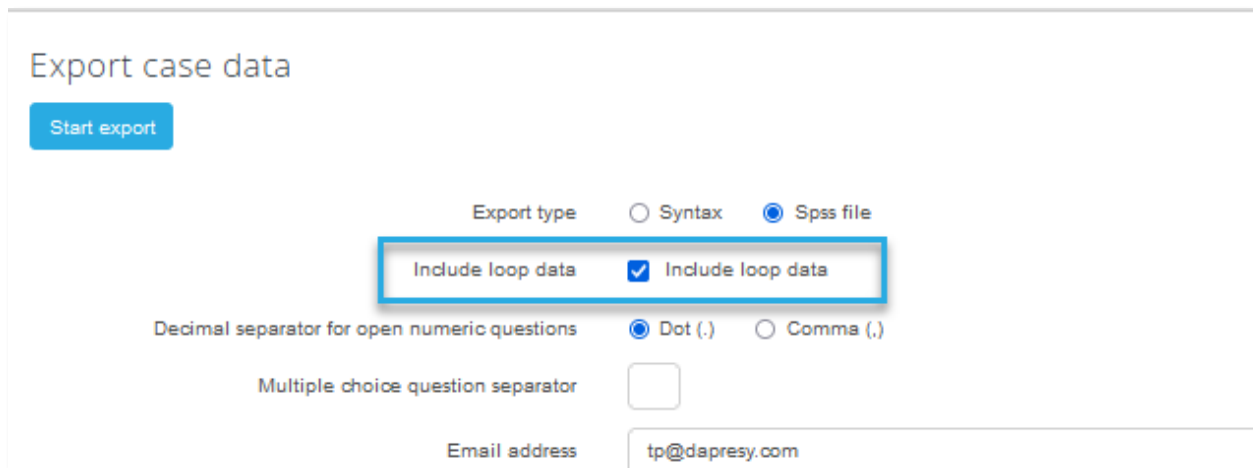
Country	<input type="checkbox"/> Access to all	Sweden UK	Check all Uncheck all
User	<input type="checkbox"/> Access to all	folder: folder: Anna Carlsson Kristin Svensson Nils Sten Rudy Brown Steven Smith Thomas Andersson Tim Jones	

7 Raw data exports

7.1 SPSS export, looped data support

Looped/stacked data can now be included in raw data exports to SPSS .SAV files. Each loop is exported in a separate file.

Data export page, the new option to include the looped data is available when export type is set to “SPSS file”, it is not available when export type is “Syntax”.



Export case data

Start export

Export type Syntax Spss file



Include loop data **Include loop data**

Decimal separator for open numeric questions Dot (.) Comma (,)

Multiple choice question separator

Email address

Example of an export from a project with two loops, the compressed folder contains a main file with non-looped variables and one file per loop.

Namn	Storlek	Storlek komprimerad
 Looped_2.sav	4 374	1 383
 Looped_3.sav	978	513
 Main.sav	23 749	5 190