

Forsta Visualizations June 2024 Release



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1.Introduction

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

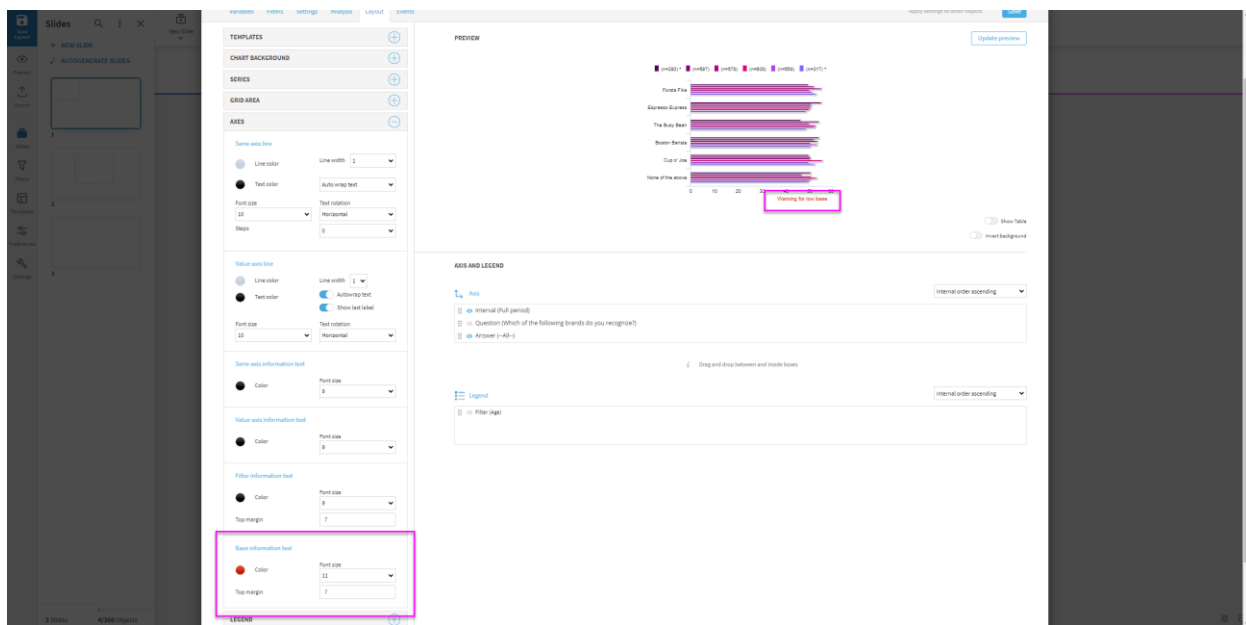
Best Regards,
Forsta Team

2. Overview

StoryTeller

- Format low base text

In both StoryTeller and StoryCreator, we've introduced a new feature that allows you to customize the size and color of the base size warning text when it appears underneath the object due to low base.



- Heatmap coloring rules for tables

In order to create a more comprehensive heatmap, we've incorporated the same cell coloring functionalities used in our Heat Map chart into table cells. This new feature can be found under Settings in the Heatmap section. When enabled, it will override the background color of value cells from background color, formatting rules for cell backgrounds, and significance tests if colored backgrounds have been applied.

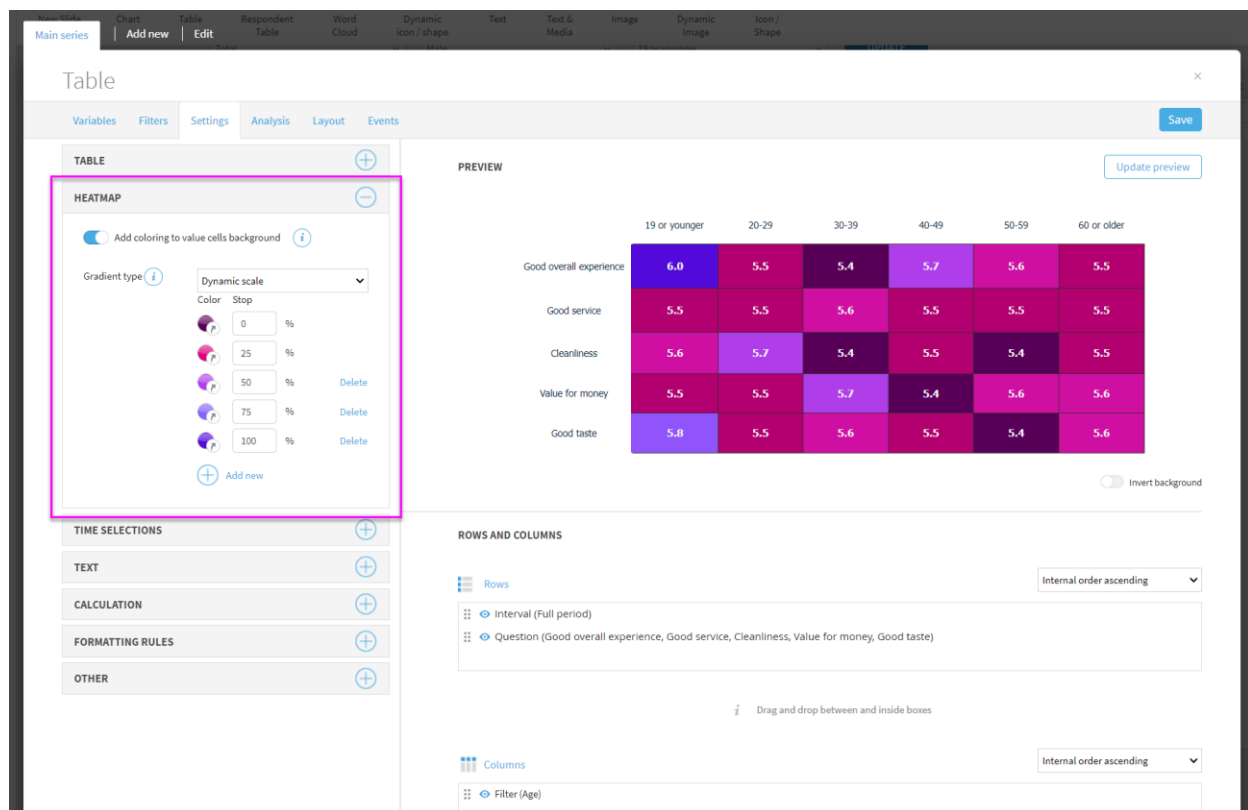


Table Settings - HEATMAP

☒ Add coloring to value cells background

Gradient type: **Dynamic scale**

Color Stop

Color	Stop	%	Action
	0	%	
	25	%	
	50	%	Delete
	75	%	Delete
	100	%	Delete

[Add new](#)

PREVIEW

	19 or younger	20-29	30-39	40-49	50-59	60 or older
Good overall experience	6.0	5.5	5.4	5.7	5.6	5.5
Good service	5.5	5.5	5.6	5.5	5.5	5.5
Cleanliness	5.6	5.7	5.4	5.5	5.4	5.5
Value for money	5.5	5.5	5.7	5.4	5.6	5.6
Good taste	5.8	5.5	5.6	5.5	5.4	5.6

☐ Invert background

ROWS AND COLUMNS

Rows

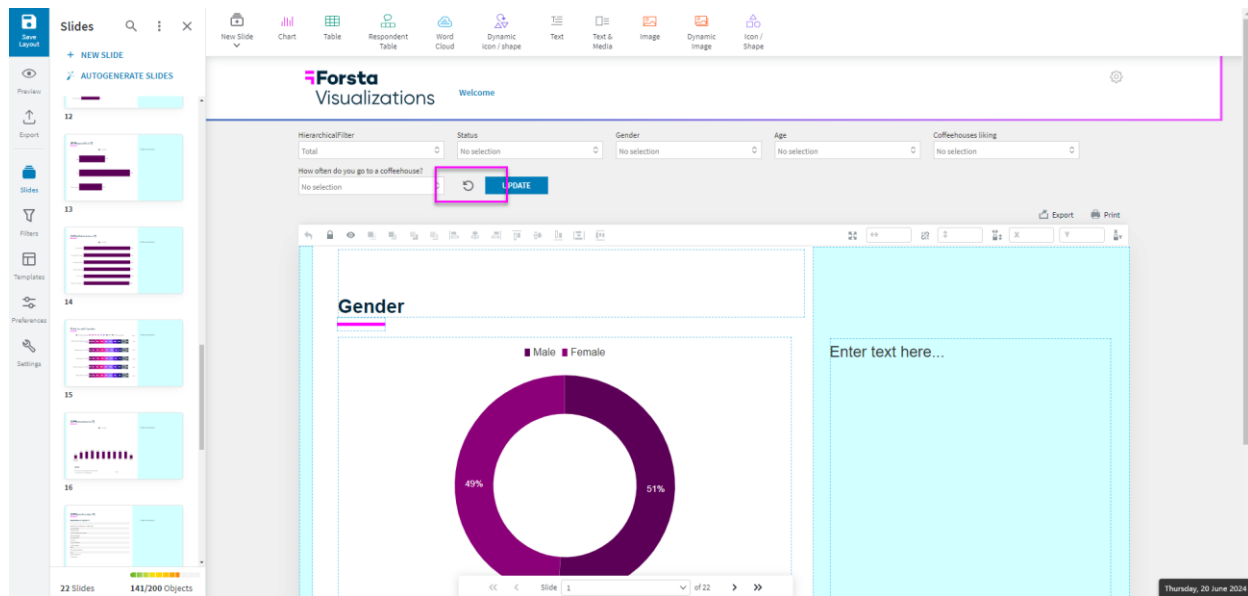
- Interval (Full period)
- Question (Good overall experience, Good service, Cleanliness, Value for money, Good taste)

Columns

- Filter (Age)

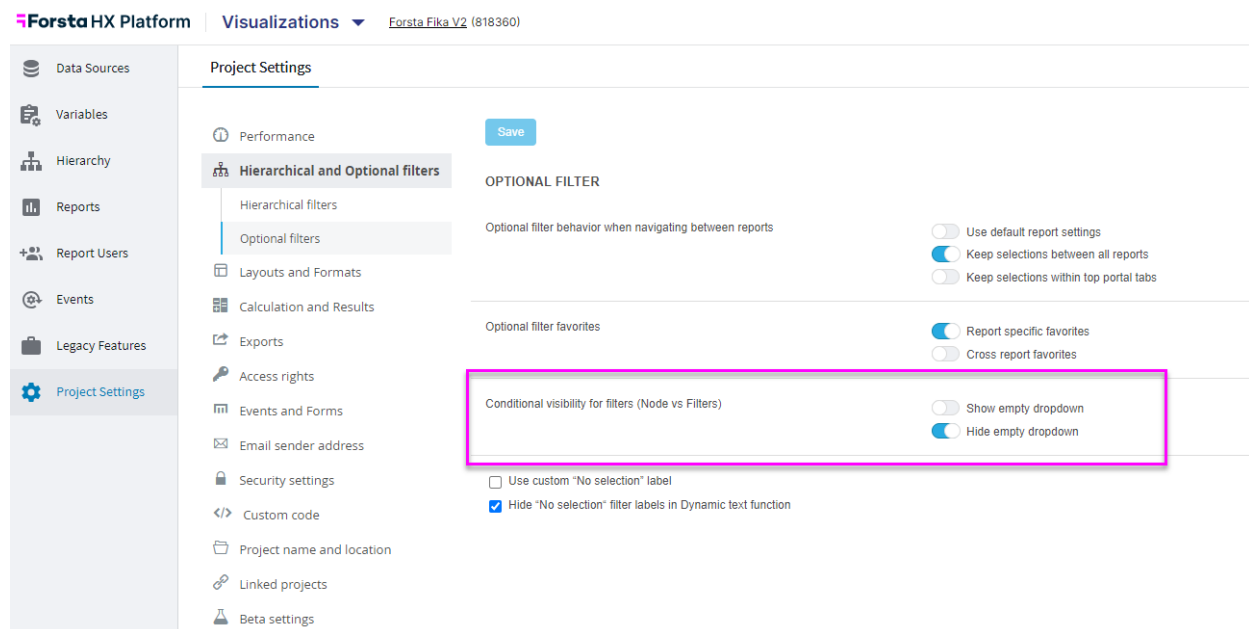
- Reset filter options to Default

We've introduced a new feature that allows users to reset all filters and revert to the default selections for a specific user or report. By default, this functionality is available in all new projects. For existing projects, you can enable it by reaching out to our Support team.



- Hide filters that aren't connected to Hierarchy node -

When different combinations of hierarchy nodes and filters are connected through our feature 'Node vs Variable subsets/Filters,' it can result in filter dropdowns being empty. To address this, we've introduced a new option that allows users to choose whether these dropdowns should be displayed (the default behavior) or hidden. You can find this option under Project Settings -> Hierarchical and Optional filters -> Optional filters.



Forsta HX Platform | Visualizations ▾ | Forsta Fika V2 (818360)

Project Settings

Performance Save

Hierarchical and Optional filters

Hierarchical filters

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

OPTIONAL FILTER

Optional filter behavior when navigating between reports

☐ Use default report settings

☒ Keep selections between all reports

☐ Keep selections within top portal tabs

Optional filter favorites

☒ Report specific favorites

☐ Cross report favorites

Conditional visibility for filters (Node vs Filters)

☐ Show empty dropdown

☒ Hide empty dropdown

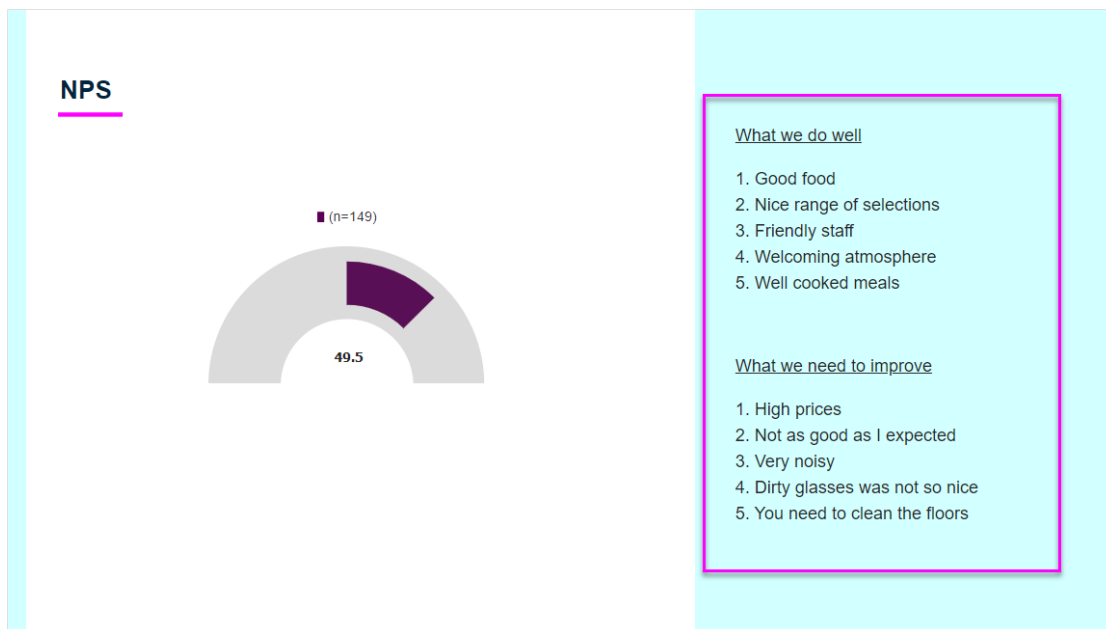
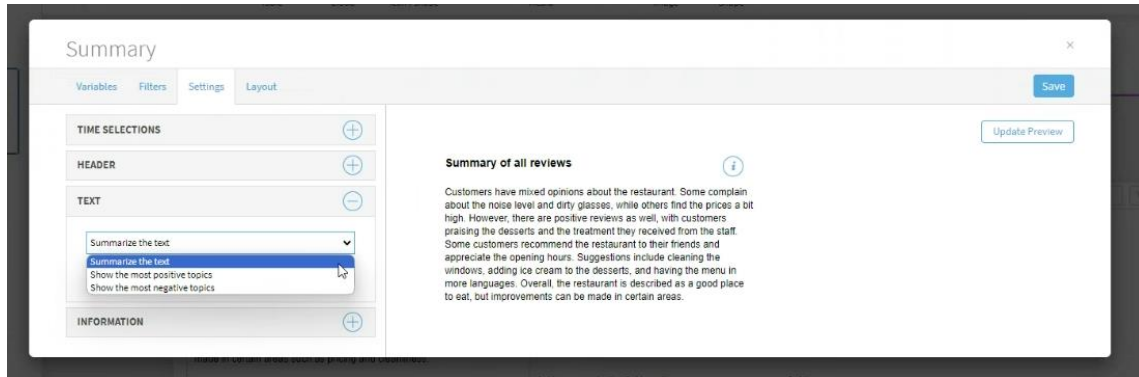
☐ Use custom "No selection" label

☒ Hide "No selection" filter labels in Dynamic text function

- Summary AI object

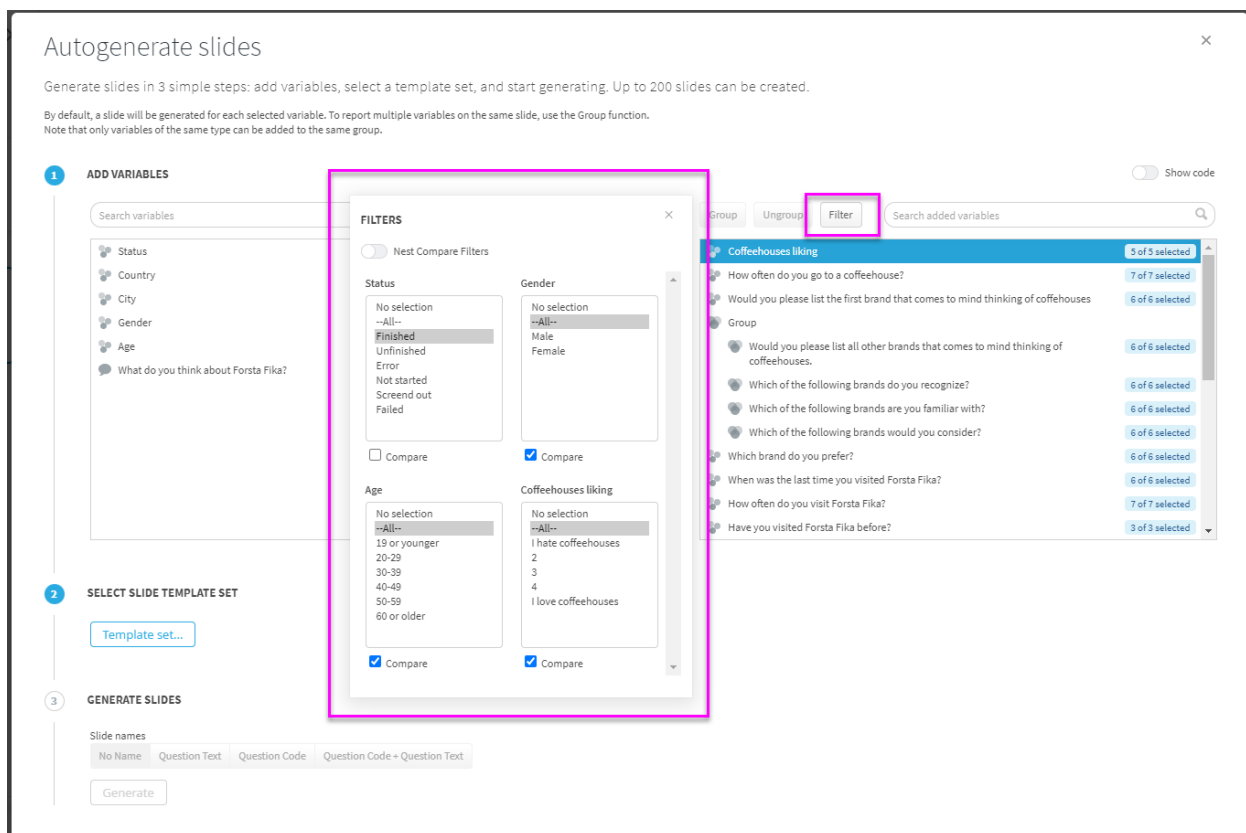
We've recently introduced a new feature in our StoryTeller called the Summary object. This object leverages AI to either summarize the comments or summarize the most positive and negative topics from your open-ended questions in real time, while also considering your filter selections.

The text displayed in the object is generated by AI. To ensure consistency between online display and exports, as well as across different users, the system caches the object. It only generates a new request when different data needs summarization, such as when a filter is applied.



- Improved filter support in AutoGenerate charts

To enhance the AutoGenerate slides functionality in StoryTeller, we've made it compatible with looped data and other questions that require in-object filtering. We've added an additional optional step in our panel for creating slides. After selecting your questions and grouping them, you now have the option to add in-object filters to each specific slide. These filters will be applied to all objects within your slide.



The screenshot displays the 'Autogenerate slides' interface. At the top, it says 'Generate slides in 3 simple steps: add variables, select a template set, and start generating. Up to 200 slides can be created.' Below this, it notes: 'By default, a slide will be generated for each selected variable. To report multiple variables on the same slide, use the Group function. Note that only variables of the same type can be added to the same group.'

The interface is divided into three main sections:

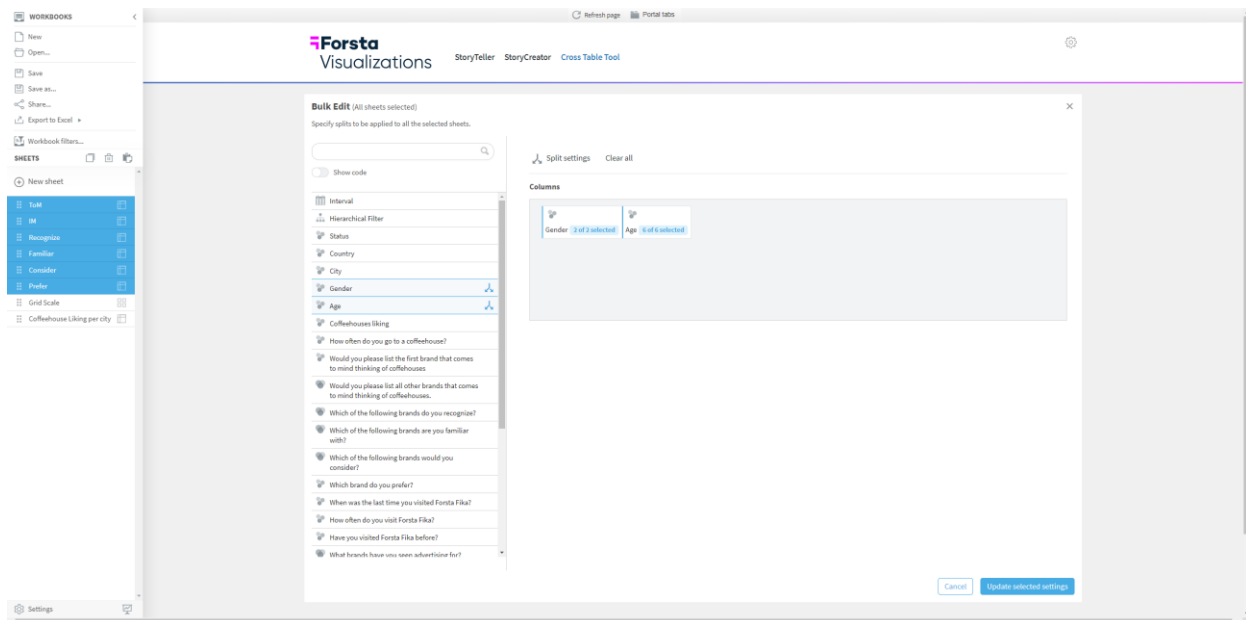
- 1 ADD VARIABLES**: Includes a search bar and a list of variables: Status, Country, City, Gender, Age, and 'What do you think about Forsta Fika?'. A 'FILTERS' panel is overlaid on this section, showing filters for Status, Gender, Age, and 'Coffeehouses liking'. The 'Filter' button is highlighted in the top right of this panel.
- 2 SELECT SLIDE TEMPLATE SET**: Includes a 'Template set...' button.
- 3 GENERATE SLIDES**: Includes a 'Slide names' section with options: 'No Name', 'Question Text', 'Question Code', and 'Question Code + Question Text'. A 'Generate' button is at the bottom.

The right side of the interface shows a list of questions with their respective counts: 'Coffeehouses liking' (3 of 3 selected), 'How often do you go to a coffeehouse?' (7 of 7 selected), 'Would you please list the first brand that comes to mind thinking of coffeehouses' (6 of 6 selected), 'Group', 'Would you please list all other brands that comes to mind thinking of coffeehouses.' (6 of 6 selected), 'Which of the following brands do you recognize?' (6 of 6 selected), 'Which of the following brands are you familiar with?' (6 of 6 selected), 'Which of the following brands would you consider?' (6 of 6 selected), 'Which brand do you prefer?' (6 of 6 selected), 'When was the last time you visited Forsta Fika?' (6 of 6 selected), 'How often do you visit Forsta Fika?' (7 of 7 selected), and 'Have you visited Forsta Fika before?' (3 of 3 selected).

Cross Table tool

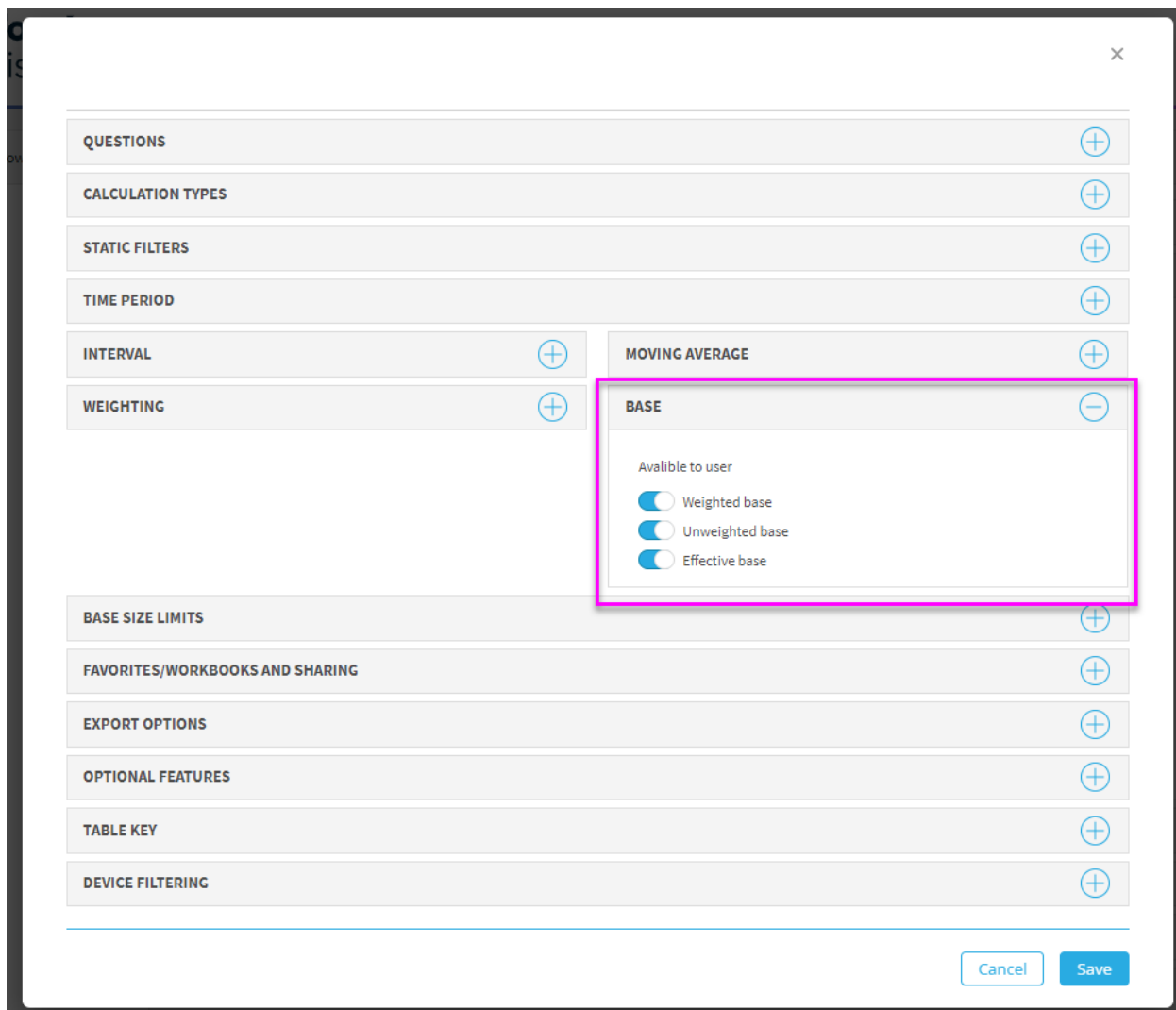
- Crosstab - apply Splits to multiple Sheets

In earlier updates, we've introduced the ability to perform bulk edits on multiple sheets simultaneously. These edits have been settings for your sheets. In the newly released version, you can also modify the splits used by the selected sheets. To do this, simply choose multiple sheets in the workbook panel, click on 'Bulk edit splits,' and select the questions you want to use as splits. Please note that these bulk edits for splits are only available for the standard layout, where questions are in rows and splits are in columns. All other layouts will be deselected and not get the splits applied.



- Hide base size options in CT

In our Cross Table tool, we've enhanced the user experience by adding an option to hide the base size for report users. This setting is accessible on the Settings screen for the Cross Table tool. As an administrator, you can choose which options are available for use in the table.



The screenshot shows the 'Settings' screen for the Cross Table tool. The settings are organized into a list of expandable sections. The 'BASE' section is currently expanded, showing three toggle options under the heading 'Available to user': 'Weighted base', 'Unweighted base', and 'Effective base'. All three toggles are currently turned on. The 'BASE' section is highlighted with a red border. At the bottom right of the settings panel, there are 'Cancel' and 'Save' buttons.

Setting	Icon
QUESTIONS	+
CALCULATION TYPES	+
STATIC FILTERS	+
TIME PERIOD	+
INTERVAL	+
WEIGHTING	+
MOVING AVERAGE	+
BASE	-
BASE SIZE LIMITS	+
FAVORITES/WORKBOOKS AND SHARING	+
EXPORT OPTIONS	+
OPTIONAL FEATURES	+
TABLE KEY	+
DEVICE FILTERING	+

Available to user

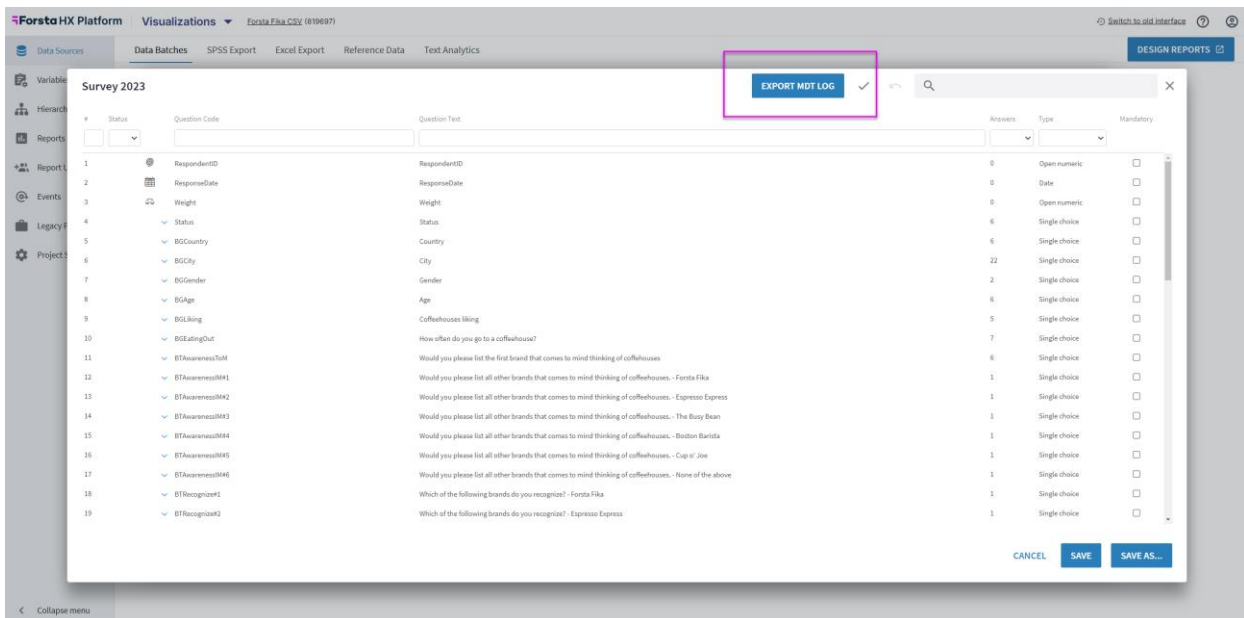
- ☒ Weighted base
- ☒ Unweighted base
- ☒ Effective base

Cancel Save

Data management

- Meta Data Transformation log

While creating a Meta Data Transformation (MDT), numerous rules and modifications can be applied to the data. However, it can be challenging to track these changes once an MDT is saved. To address this, we've introduced an MDT log. This log allows you to view all the changes made within the transformation, which is particularly helpful when identifying original variables from the source that have been altered during import. Whether you're working with an existing project or need to understand import processes, accessing the log is simple: just download the document from your MDT. All questions are shown in alphabetic order in the excel file.



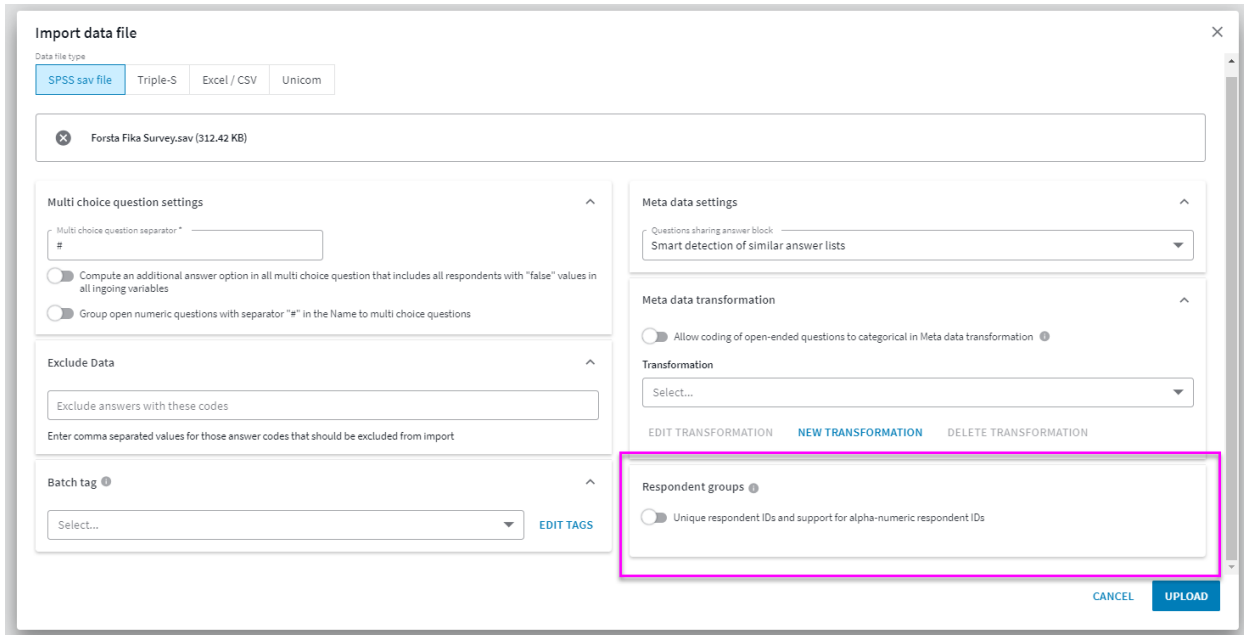
The screenshot displays the Forsta HX Platform interface. The top navigation bar includes 'Visualizations' and 'Forsta F&A CSV (819697)'. The main menu on the left lists 'Data Sources', 'Data Batches', 'SPSS Export', 'Excel Export', 'Reference Data', and 'Text Analytics'. The 'Data Batches' tab is active, showing a list of variables for 'Survey 2023'. A modal window titled 'Survey 2023' is open, displaying a table of variables. The 'EXPORT MDT LOG' button is highlighted with a red box. The table lists variables such as RespondentID, ResponseDate, Weight, Status, BGCity, BGGender, BGAge, BGLiking, BGEatingOut, and various awareness and recognition questions. The table has columns for 'Status', 'Question Code', 'Question Text', 'Answers', 'Type', and 'Mandatory'.

#	Status	Question Code	Question Text	Answers	Type	Mandatory
1		RespondentID	RespondentID	0	Open numeric	☐
2		ResponseDate	ResponseDate	0	Date	☐
3		Weight	Weight	0	Open numeric	☐
4		Status	Status	6	Single choice	☐
5		BGCCountry	Country	6	Single choice	☐
6		BGCity	City	22	Single choice	☐
7		BGGender	Gender	3	Single choice	☐
8		BGAge	Age	6	Single choice	☐
9		BGLiking	Coffeehouses liking	5	Single choice	☐
10		BGEatingOut	How often do you go to a coffeehouse?	7	Single choice	☐
11		BTAwareness04	Would you please list the first brand that comes to mind thinking of coffeehouses	6	Single choice	☐
12		BTAwareness041	Would you please list all other brands that comes to mind thinking of coffeehouses. - Forsta F&A	1	Single choice	☐
13		BTAwareness042	Would you please list all other brands that comes to mind thinking of coffeehouses. - Espresso Express	1	Single choice	☐
14		BTAwareness043	Would you please list all other brands that comes to mind thinking of coffeehouses. - The Busy Bean	1	Single choice	☐
15		BTAwareness044	Would you please list all other brands that comes to mind thinking of coffeehouses. - Boston Barista	1	Single choice	☐
16		BTAwareness045	Would you please list all other brands that comes to mind thinking of coffeehouses. - Cup o' Joe	1	Single choice	☐
17		BTAwareness046	Would you please list all other brands that comes to mind thinking of coffeehouses. - None of the above	1	Single choice	☐
18		BTRecognize#1	Which of the following brands do you recognize? - Forsta F&A	1	Single choice	☐
19		BTRecognize#2	Which of the following brands do you recognize? - Espresso Express	1	Single choice	☐

Data connectivity

- Support unique Respondent id based on source

In Forsta Visualizations, each project requires unique respondent IDs. This ensures precise tracking of specific respondents from data import to reporting. To enhance usability for imports from multiple surveys and data sets that use alphanumeric respondent IDs, we've introduced a new concept called "respondent groups." With this functionality, you can import the same respondent ID multiple times within a single project, but unique within the group, while also accommodating alphanumeric respondent IDs.



Import data file

Data file type

[SPSS sav file](#) [Triple-S](#) [Excel / CSV](#) [Unicom](#)

 Forsta Fika Survey.sav (312.42 KB)

Multi choice question settings

Multi choice question separator *

#

☐ Compute an additional answer option in all multi choice question that includes all respondents with "false" values in all ingoing variables

☐ Group open numeric questions with separator "*" in the Name to multi choice questions

Exclude Data

Exclude answers with these codes

Enter comma separated values for those answer codes that should be excluded from import

Batch tag

Select...

[EDIT TAGS](#)

Meta data settings

Questions sharing answer block

Smart detection of similar answer lists

Meta data transformation

☐ Allow coding of open-ended questions to categorical in Meta data transformation

Transformation

Select...

[EDIT TRANSFORMATION](#) [NEW TRANSFORMATION](#) [DELETE TRANSFORMATION](#)

Respondent groups

☐ Unique respondent IDs and support for alpha-numeric respondent IDs

[CANCEL](#) [UPLOAD](#)



Project administration

- Customer overview page

In our latest version, we’ve introduced a new page that provides an overview of your customer account. As shown in the image below, aggregated metrics such as the renewal date, number of admins, number of report users, number of projects, number of respondents, and number of data points are displayed.

ForstaHX Platform

Visualizations

Switch to old interface

Projects

Users

Global Templates

Overview

Customer Overview

Forsta Fika

Customer renewal

2024-06-11

Admin users

3

Report users

0 out of 0

Projects

1

Published

1

Draft

0

Respondents

9.00 K

Published

6.00 K

Draft

0

Active

3.00 K

Not active

0

Data points

Published

459.02 K

Draft

0

Imported

231.01 K

Activated

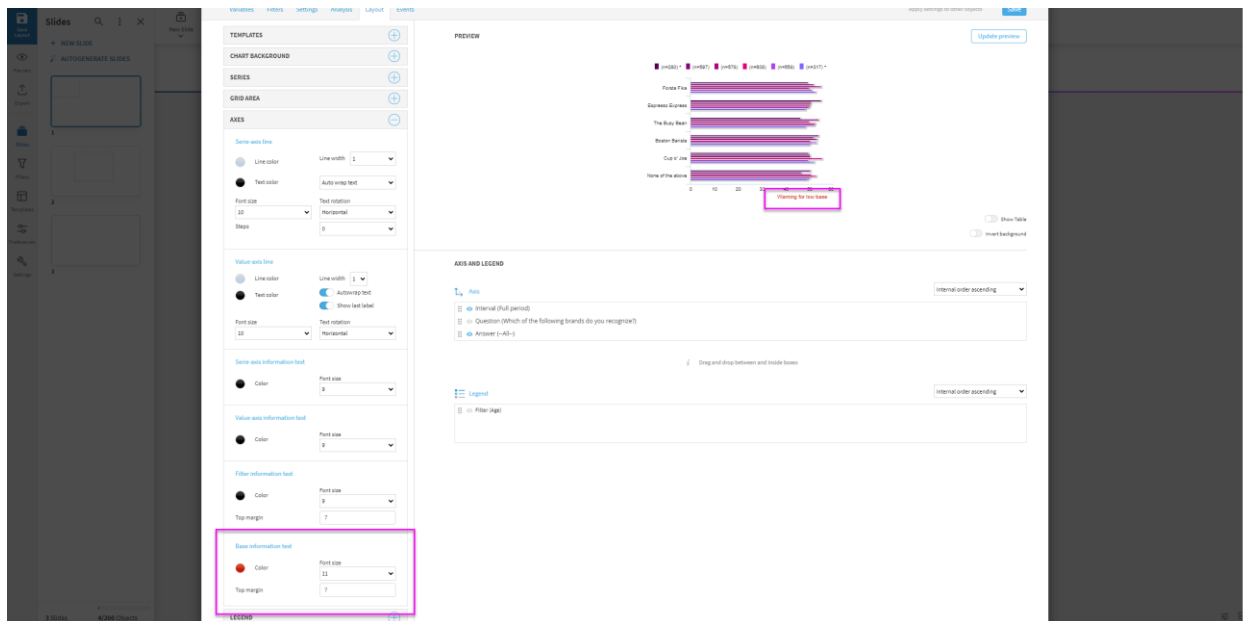
0

Admin Users (3)						
Username	First name	Last name	Email	Expiry date	# Login last 30 days	
Emma.Andersson	Emma	Andersson	Emma.Andersson@ForstaFika...	2031-01-05	0	
Charles.Smith	Charles	Smith	Charles.Smith@ForstaFika.co...	2031-01-05	0	
Sandra.Adams	Sandra	Adams	Sandra.Adams@ForstaFika.c...	2031-01-05	0	

3. StoryTeller

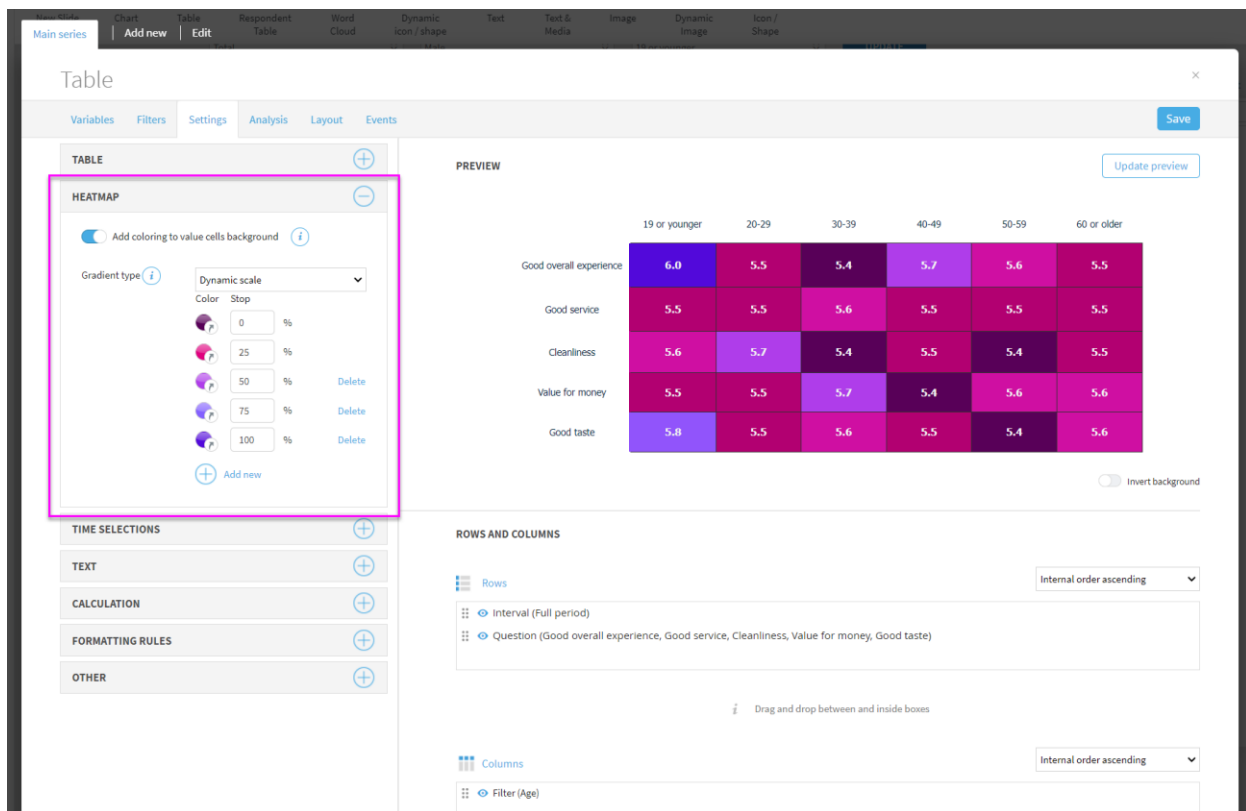
3.1 Format low base text

In both StoryTeller and StoryCreator, we've introduced a new feature that allows you to customize the size and color of the base size warning text when it appears underneath the object due to low base.



3.2 Heatmap coloring rules for tables

In order to create a more comprehensive heatmap, we've incorporated the same cell coloring functionalities used in our Heat Map chart into table cells. This new feature can be found under Settings in the Heatmap section. When enabled, it will override the background color of value cells from background color, formatting rules for cell backgrounds, and significance tests if colored backgrounds have been applied.



Table

Variables Filters **Settings** Analysis Layout Events Save

TABLE +

HEATMAP -

☒ Add coloring to value cells background i

Gradient type i Dynamic scale ▼

Color Stop

- 0 % Delete
- 25 % Delete
- 50 % Delete
- 75 % Delete
- 100 % Delete

+ Add new

PREVIEW Update preview

	19 or younger	20-29	30-39	40-49	50-59	60 or older
Good overall experience	6.0	5.5	5.4	5.7	5.6	5.5
Good service	5.5	5.5	5.6	5.5	5.5	5.5
Cleanliness	5.6	5.7	5.4	5.5	5.4	5.5
Value for money	5.5	5.5	5.7	5.4	5.6	5.6
Good taste	5.8	5.5	5.6	5.5	5.4	5.6

☐ Invert background

ROWS AND COLUMNS

Rows Internal order ascending ▼

- Interval (Full period)
- Question (Good overall experience, Good service, Cleanliness, Value for money, Good taste)

⌵ Drag and drop between and inside boxes

Columns Internal order ascending ▼

- Filter (Age)

There are two different gradient type. Dynamic scale and Fixed scale. We use the same logic as for our Heatmap chart.

With the dynamic scale, the colors are based on the min and max value in the table, and with fixed scale, you will instead set colors to static values.

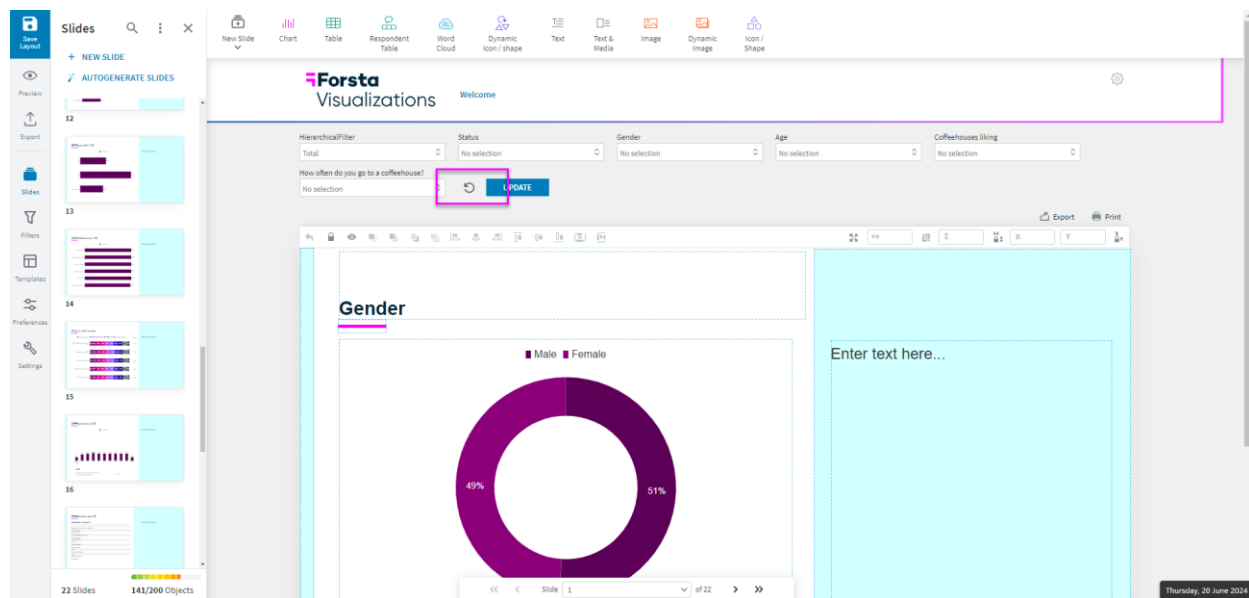
Tip! If you plan to compare multiple heat map tables, static coloring is suggested, since the colors will be the same in all tables.

NOTE!

In current version, there are no legend created in the table. If legend is needed, the suggestion is to create this with icons.

3.3 Reset filter options to Default

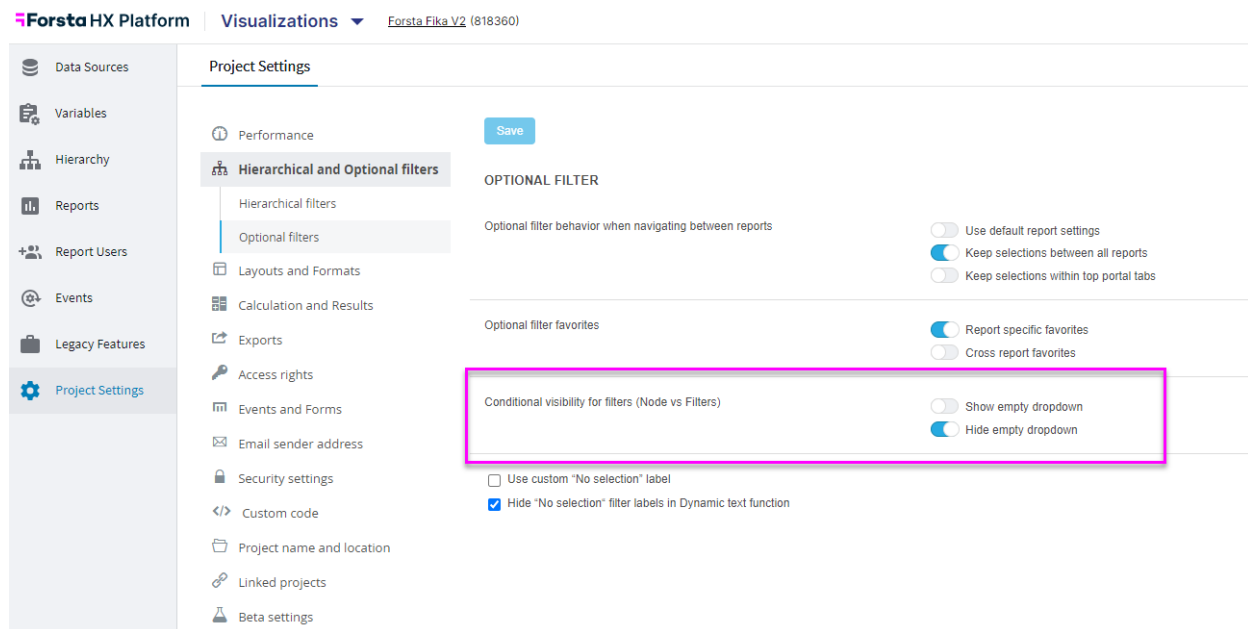
We've introduced a new feature that allows users to reset all filters and revert to the default selections for a specific user or report. By default, this functionality is available in all new projects. For existing projects, you can enable it by reaching out to our Support team.



The icon will appear on the right side of the update button. When clicked, it will reset all filter selections to their default values for that report and user. The filters affected by this button include optional filters (such as filter, variable subsets, time period, moving average, and interval) and the hierarchy filter.

3.4 Hide filters that aren't connected to Hierarchy node

When different combinations of hierarchy nodes and filters are connected through our feature 'Node vs Variable subsets/Filters,' it can result in filter dropdowns being empty. To address this, we've introduced a new option that allows users to choose whether these dropdowns should be displayed (the default behavior) or hidden. You can find this option under Project Settings -> Hierarchical and Optional filters -> Optional filters.



Forsta HX Platform | Visualizations ▾ | [Forsta Fika V2](#) (818360)

Project Settings

- Performance
- Hierarchical and Optional filters**
 - Hierarchical filters
 - 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

OPTIONAL FILTER

Optional filter behavior when navigating between reports

- ☐ Use default report settings
- ☒ Keep selections between all reports
- ☐ Keep selections within top portal tabs

Optional filter favorites

- ☒ Report specific favorites
- ☐ Cross report favorites

Conditional visibility for filters (Node vs Filters)

- ☐ Show empty dropdown
- ☒ Hide empty dropdown

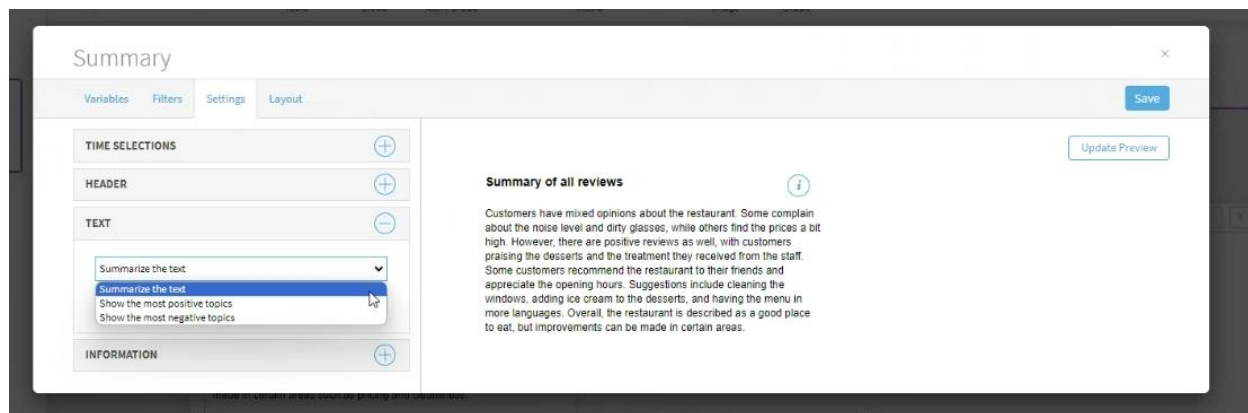
☐ Use custom "No selection" label

☒ Hide "No selection" filter labels in Dynamic text function

3.5 Summary AI object

We've recently introduced a new feature in our StoryTeller called the Summary object. This object leverages AI to either summarize the comments or summarize the most positive and negative topics from your open-ended questions in real time, while also considering your filter selections.

The text displayed in the object is generated by AI. To ensure consistency between online display and exports, as well as across different users, the system stores the output. It only generates a new request when different data needs summarization, such as when a filter is applied or when there is new active data in the project.



3.5.1 How to create a Summary object

The setup flow for a Summary object is consistent with that of all our data objects.

Variables

Choose the open-ended question you want to summarize. Note that only one question can be selected at a time. Variable subsets are not implemented for this object type.

Filters

Select the in-object filters that should be applied. Include or exclude optional filters for the object.

Settings

Time selections:

Choose the default time period to be used.

Header:

Add a personalized header for the object. You can style it under the Layout section.

Text:

Select the prompt to be used for the object. Available prompts include: “Summarize the text”, “Show the most positive topics” and “Show the most negative topics”

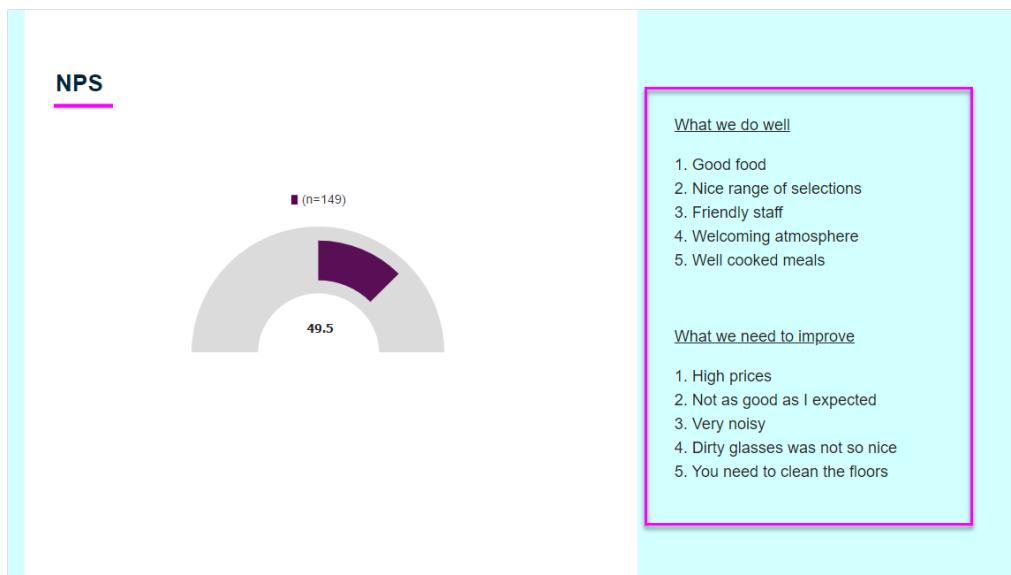
The prompt will also indicate the number of words in the generated text and, for topics, the number of topics shown. You can style it under the Layout section.

Information:

Add your own disclaimer text, which will be displayed in the information icon in the upper right corner.

Layout

All style options for the header and text are available in this section.



Here we see examples of most positive/negative topics within the question in two objects



3.5.2 How does it work?

The Summary Generation feature leverages Microsoft Azure OpenAI's natural language processing capabilities to automatically create concise summaries and discover topics in open text survey responses. Here is a summary of the process:

Input Processing: When you submit open text responses from your projects, the AI processes each response individually.

Text Analysis: The AI scans the text to understand the main points, key phrases, and overall context.

Summary Creation: Using advanced algorithms, the AI condenses the information into a summary of determined length that captures the essence of the responses without losing critical details.

Topic Categorization: The AI evaluates the sentiment of the text, determining whether the tone is positive or negative. Based on the sentiment analysis, the AI assigns the topic to either a positive or negative topic category. The topics are then ranked based on the weight of sentiment and the top topics are returned of the relevant type.

3.5.3 Data Security

As always, your data privacy and security are our top priorities. Here's how your data is handled with Azure OpenAI:

Your survey responses (inputs) and AI-generated summaries and topics (outputs):

- Are NOT available to other customers.
- Are NOT available to OpenAI.
- Are NOT used to improve OpenAI models.
- Are NOT used to improve any Microsoft or third-party products or services.
- Are NOT used for automatically improving Azure OpenAI models. The models are stateless and do not retain data from your interactions.

The Azure OpenAI Service is fully controlled by Microsoft. Microsoft hosts the OpenAI models in their Azure environment, and the service does NOT interact with any services operated by OpenAI (e.g., ChatGPT or the OpenAI API).



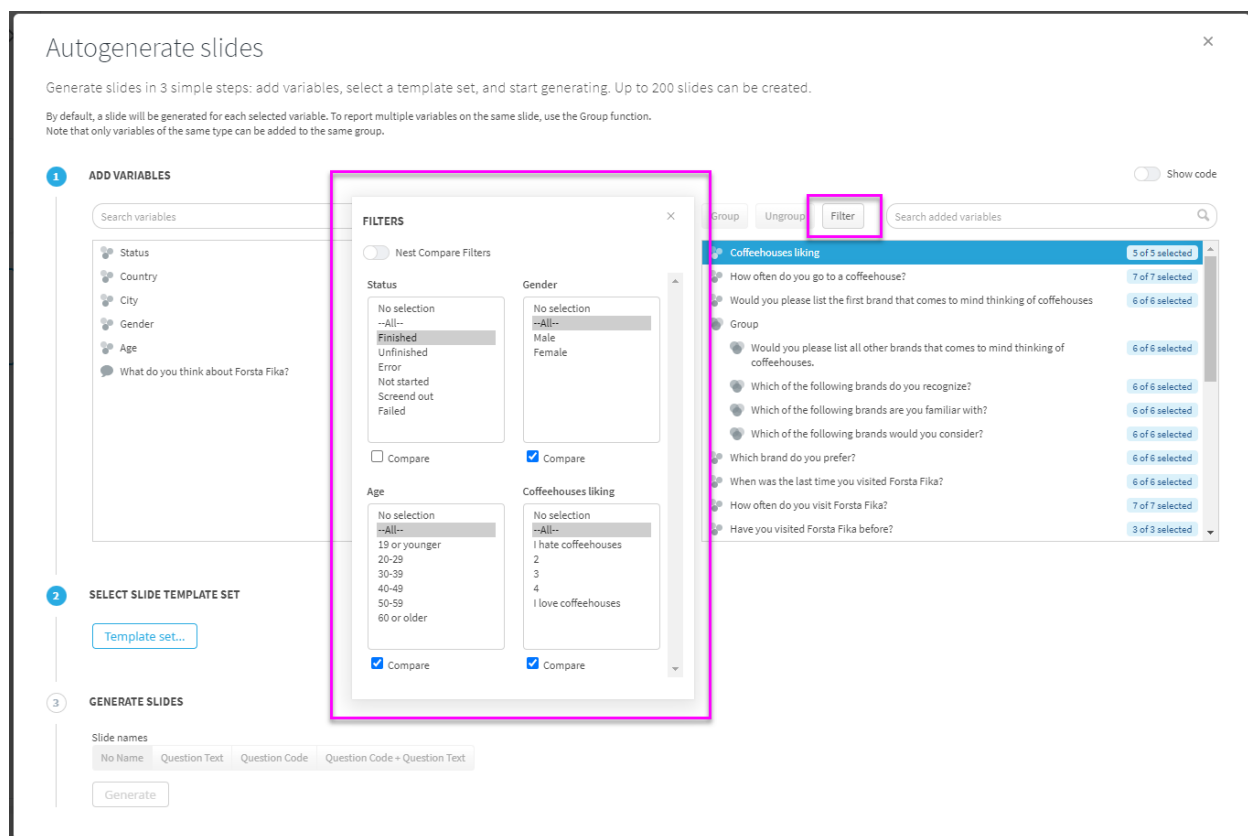
3.5.4 Notes on Reliability of Large Language Models

Large language models like Azure OpenAI are powerful but not perfect. Here are some key points:

- Context Understanding: The AI does well with context but can sometimes misinterpret unclear or complex inputs.
- Data Quality: High-quality survey responses give better results. Poorly written responses can affect accuracy.
- No Learning from Use: The AI doesn't learn from your input, ensuring your data stays private.
- Human Review: Always review AI-generated summaries and topics to ensure they meet your needs and expectations.

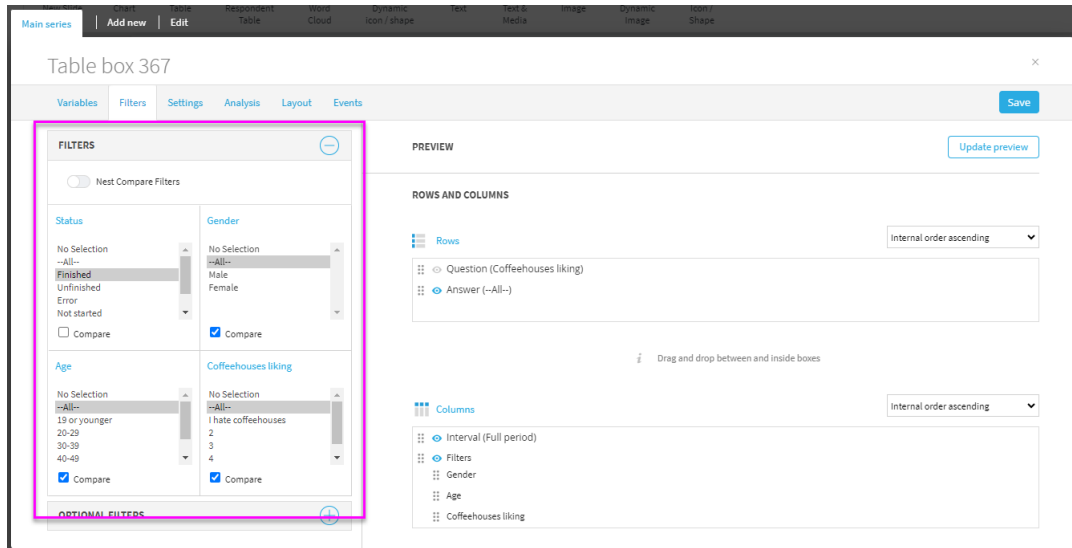
3.6 Improved filter support in AutoGenerate charts

To enhance the AutoGenerate slides functionality in StoryTeller, we've made it compatible with looped data and other questions that require in-object filtering. We've added an additional optional step in our panel for creating slides. After selecting your questions and grouping them, you now have the option to add in-object filters to each specific slide. These filters will be applied to all objects within your slide.

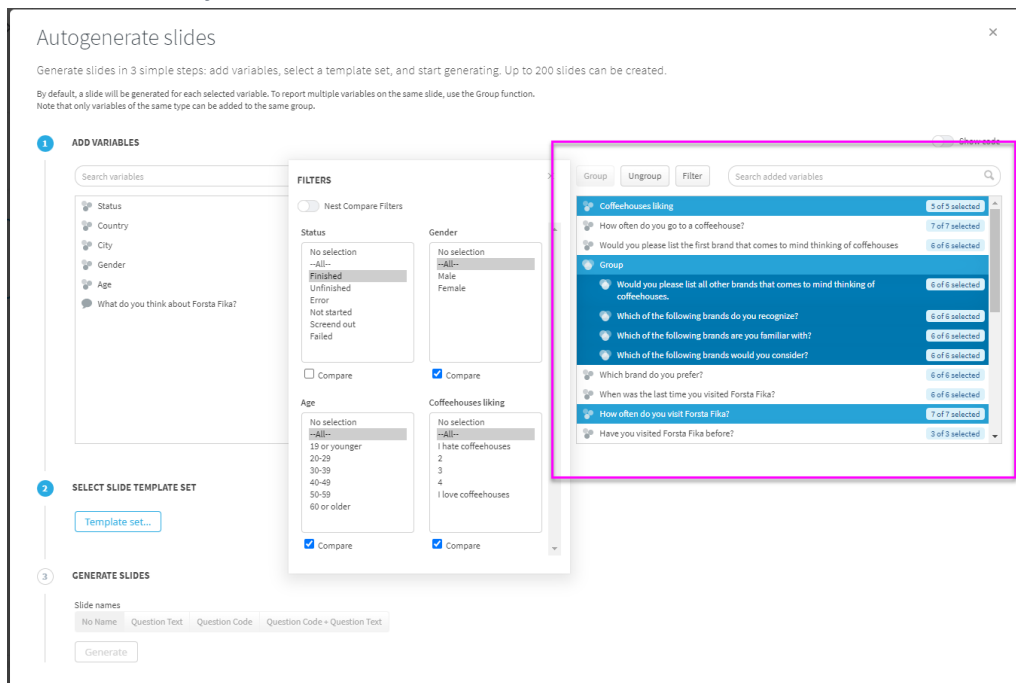


When adding a filter to the Autogenerate Slides wizard, all available data objects on the slide will have filter options enabled within the object once generated. To save your filters, click the 'X' in the upper corner.

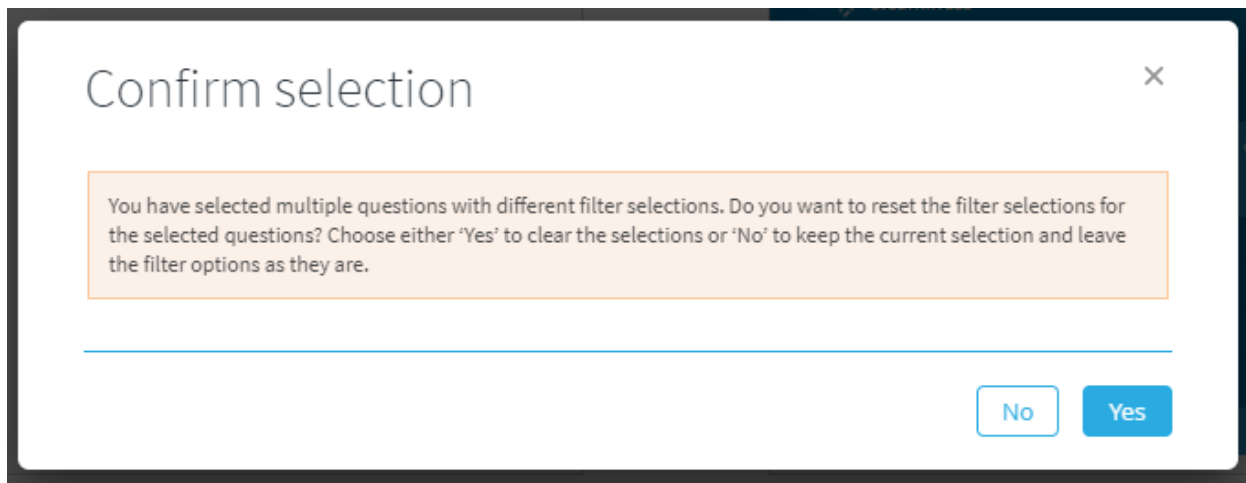
This is how it will appear in the objects once generated.



You can select multiple questions or groups to apply the same filter options to all of them simultaneously.



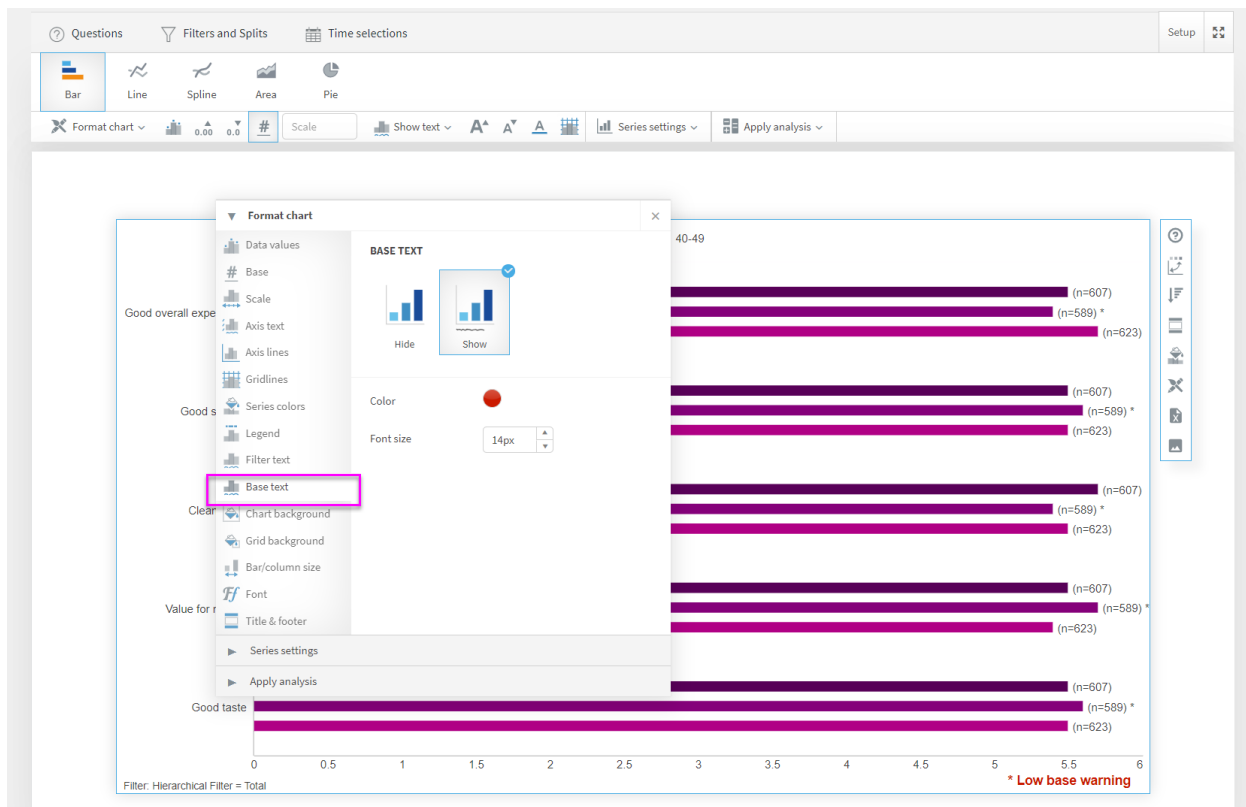
Please note that if multiple questions or groups are selected and they do not have the same filter options, a message will be displayed indicating that proceeding with this option will reset all previously selected filter options



4. StoryCreator

4.1 Format low base text

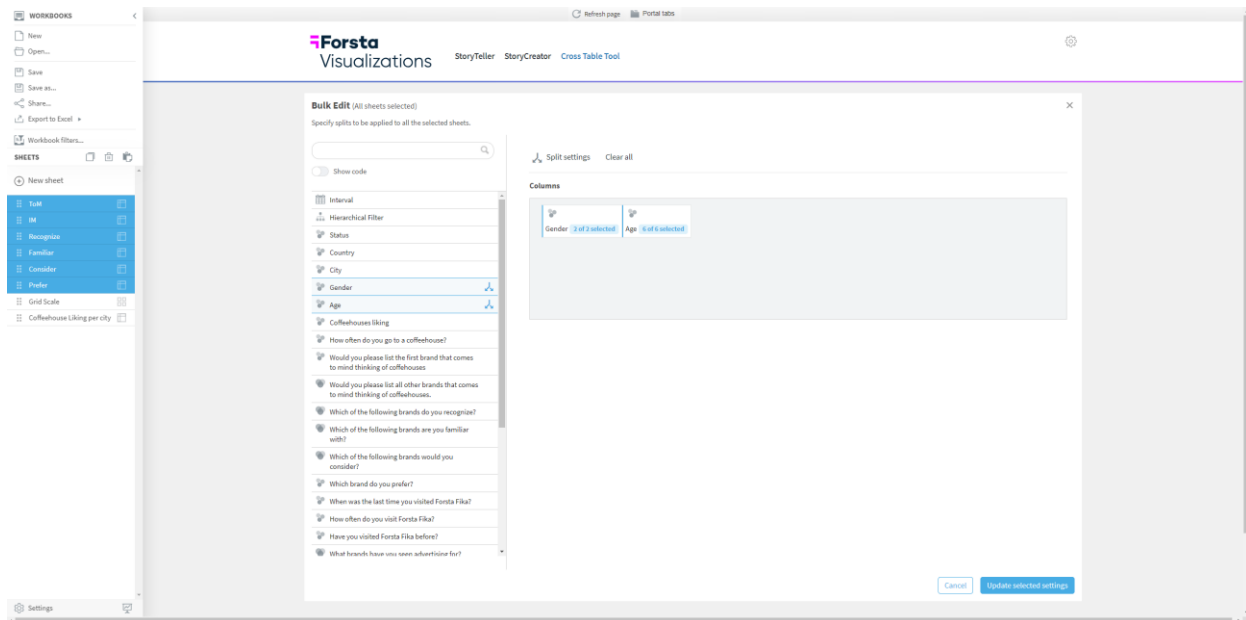
In both StoryTeller and StoryCreator, we've introduced a new feature that allows you to customize the size and color of the base size warning text when it appears underneath the object due to low base.



5. CrossTable tool

5.1 Crosstab - apply Splits to multiple Sheets

In earlier updates, we've introduced the ability to perform bulk edits on multiple sheets simultaneously. These edits have been settings for your sheets. In the newly released version, you can also modify the splits used by the selected sheets. To do this, simply choose multiple sheets in the workbook panel, click on 'Bulk edit splits,' and select the questions you want to use as splits.

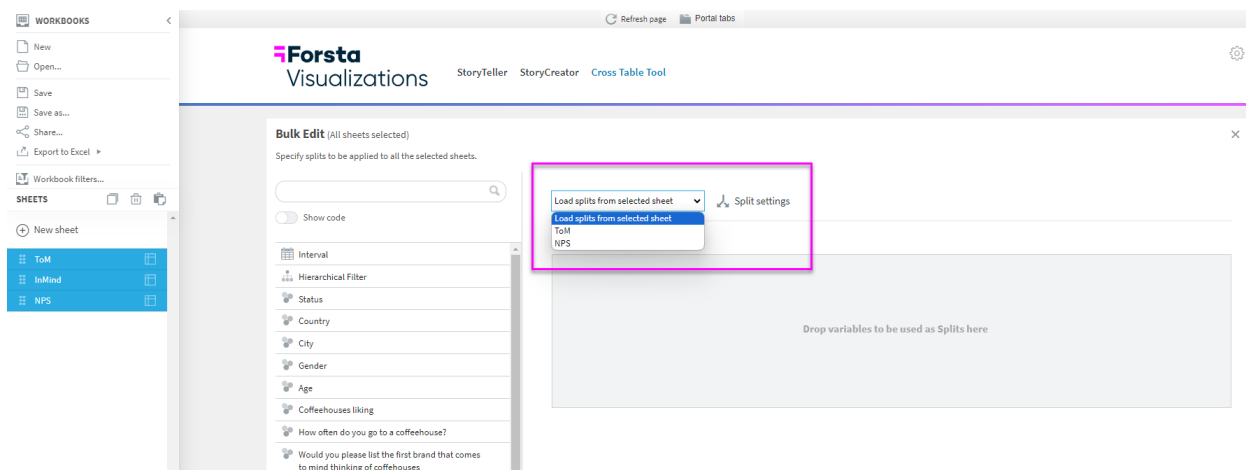


NOTE! The bulk edits for splits are only available for the standard layout, where questions are in rows and splits are in columns. All other layouts will be deselected and not get the splits applied.

5.1.1 How to use Bulk edit Splits

When you've selected multiple slides in the sheets panel on the left, you'll find options to modify all sheets. One new option is "Bulk Edit Splits". When you choose this option, all questions that can be used as splits are displayed on the left. The regular drop zone appears at the top of the page.

If splits have been added to any of the selected sheets, you can load their split settings. At the top of the page, a dropdown menu shows all sheets with splits. You can select from these options.



NOTE!

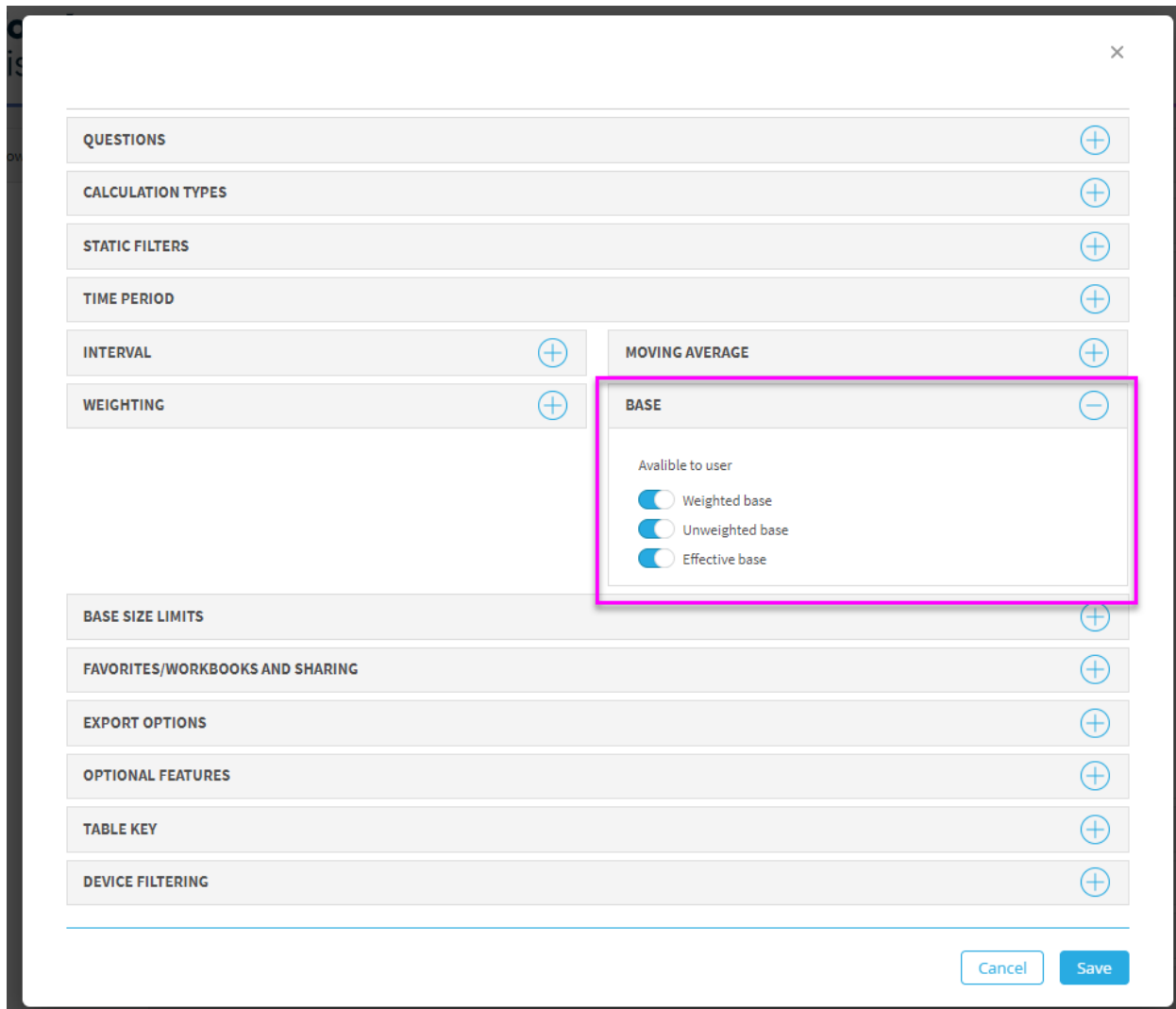
Items used as filters in any of the sheets are hidden, together with Numerical and Index questions.

Hierarchy can only be used as filter or split. If hierarchy is set as filter in some sheets, and as splits in others, all sheets will get the same selection as in the current edit mode.

If filter access is enabled, these will behave in the same way as hierarchy filters – they are always applied, either as filter or split.

5.2 Hide base size options in CT

In our Cross Table tool, we've enhanced the user experience by adding an option to hide the base size for report users. This setting is accessible on the Setup screen for the Cross Table tool. As an administrator, you can choose which options are available for use in the table.



The screenshot shows the 'Cross Table Setup' dialog box. The 'BASE' section is expanded, revealing three toggle switches under the heading 'Available to user':

- ☒ Weighted base
- ☒ Unweighted base
- ☒ Effective base

The dialog box includes a list of setup categories on the left, each with a '+' icon: QUESTIONS, CALCULATION TYPES, STATIC FILTERS, TIME PERIOD, INTERVAL, WEIGHTING, MOVING AVERAGE, BASE (expanded), BASE SIZE LIMITS, FAVORITES/WORKBOOKS AND SHARING, EXPORT OPTIONS, OPTIONAL FEATURES, TABLE KEY, and DEVICE FILTERING. At the bottom right are 'Cancel' and 'Save' buttons.

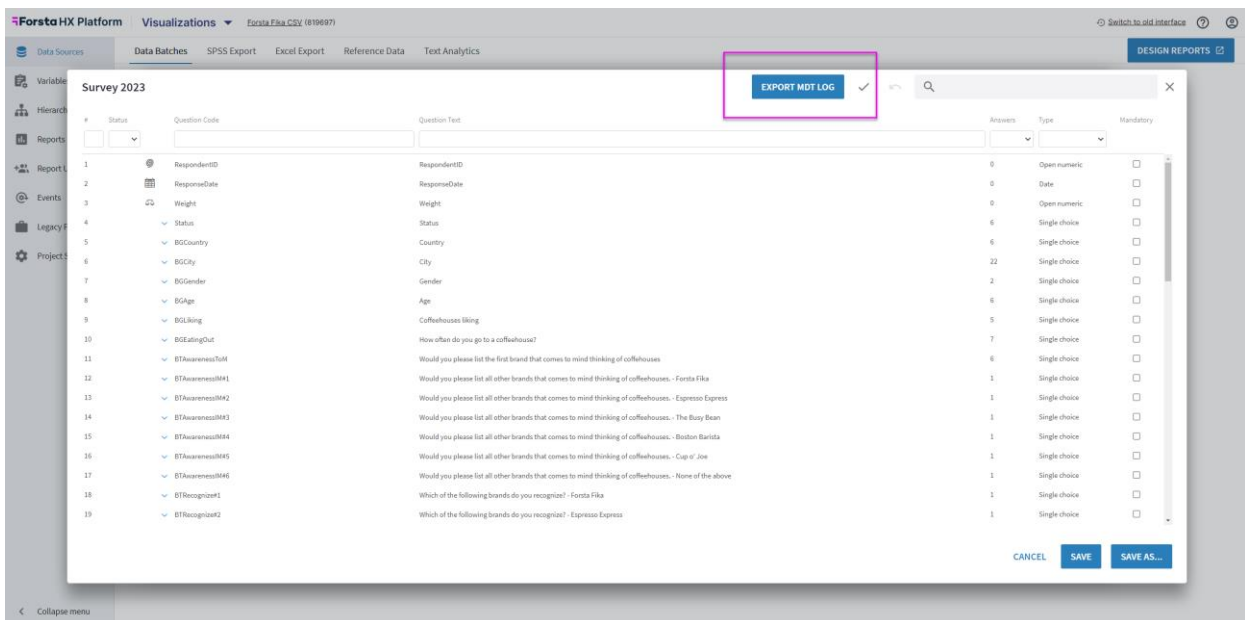


Disabling these options will remove them completely from the CrossTable tool report. Additionally, the option will be removed from all saved workbook settings. If it was previously enabled in any of them, it will be removed. Even if it's added back in the settings panel, it won't automatically apply to any of the saved workbooks

6.Data management

6.1 Meta Data Transformation log

While creating a Meta Data Transformation (MDT), numerous rules and modifications can be applied to the Meta data. However, it can be challenging to track these changes once an MDT is saved. To address this, we've introduced an MDT log. This log allows you to view all the changes made within the transformation, which is particularly helpful when identifying original variables from the source that have been altered during import. Whether you're working with an existing project or need to understand import processes, accessing the log is simple: just download the document from your MDT. All questions are shown in alphabetic order in the excel file.



The screenshot displays the Forsta HX Platform interface. The top navigation bar includes 'Data Sources', 'Data Batches', 'SPSS Export', 'Excel Export', 'Reference Data', and 'Text Analytics'. The 'Data Batches' tab is active, showing a list of data batches. A modal window titled 'Survey 2023' is open, displaying a table of variables and their corresponding questions. The 'EXPORT MDT LOG' button is highlighted with a red box. The table lists variables such as RespondentID, ResponseDate, Weight, Status, BGCcountry, BGCcity, BGCgender, BGCage, BGCbing, BGCeatingout, BTAwareness04, BTAwareness041, BTAwareness042, BTAwareness043, BTAwareness044, BTAwareness045, BTAwareness046, BTRecognize01, and BTRecognize02. The questions are listed in the 'Question Text' column, and the 'Answers' column shows the number of responses for each question. The 'Type' column indicates the data type (e.g., Open numeric, Date, Single choice). The 'Mandatory' column shows a checkbox for each question.

#	Status	Question Code	Question Text	Answers	Type	Mandatory
1		RespondentID	RespondentID	0	Open numeric	☐
2		ResponseDate	ResponseDate	0	Date	☐
3		Weight	Weight	0	Open numeric	☐
4		Status	Status	6	Single choice	☐
5		BGCcountry	Country	6	Single choice	☐
6		BGCcity	City	22	Single choice	☐
7		BGCgender	Gender	2	Single choice	☐
8		BGCage	Age	6	Single choice	☐
9		BGCbing	Coffeshouses BING	5	Single choice	☐
10		BGCeatingout	How often do you go to a coffeshouse?	7	Single choice	☐
11		BTAwareness04	Would you please list the first brand that comes to mind thinking of coffeshouses	6	Single choice	☐
12		BTAwareness041	Would you please list all other brands that comes to mind thinking of coffeshouses. - Fortia Fika	1	Single choice	☐
13		BTAwareness042	Would you please list all other brands that comes to mind thinking of coffeshouses. - Espresso Express	1	Single choice	☐
14		BTAwareness043	Would you please list all other brands that comes to mind thinking of coffeshouses. - The Busy Bean	1	Single choice	☐
15		BTAwareness044	Would you please list all other brands that comes to mind thinking of coffeshouses. - Boston Barista	1	Single choice	☐
16		BTAwareness045	Would you please list all other brands that comes to mind thinking of coffeshouses. - Cup o' Joe	1	Single choice	☐
17		BTAwareness046	Would you please list all other brands that comes to mind thinking of coffeshouses. - None of the above	1	Single choice	☐
18		BTRecognize01	Which of the following brands do you recognize? - Fortia Fika	1	Single choice	☐
19		BTRecognize02	Which of the following brands do you recognize? - Espresso Express	1	Single choice	☐

6.1.1 What is included in the log

All changes saved in the MDT is shown here. Code name, Text labels (both questions and answers), type of variable, if any are mandatory are included. Each piece of information is saved as a row in the Excel file, allowing historical changes to be tracked.

Columns in the exported file:

MDT ID

Internal ID for that specific Meta Data Transformation. This ID is unique.

MDT Name

The name of the MDT. Note that the name is not unique because MDTs can be deleted and recreated. Always verify that the MDT ID matches when comparing multiple MDT files.

Question Code

Displays the original name of the question from the source.

Changes

Indicates the type of changes made. If the question code is modified, this column will show "QuestionCode."

Values

Describes what the transformation is doing. For code changes, it displays the new code. If there are true/false settings (e.g., mandatory questions or inactivated items), the state is shown here.

Date Changed

Shows when each row was saved to the MDT. If there are multiple changes to the same question, multiple rows will be displayed. To view the latest changes, sort by this column.

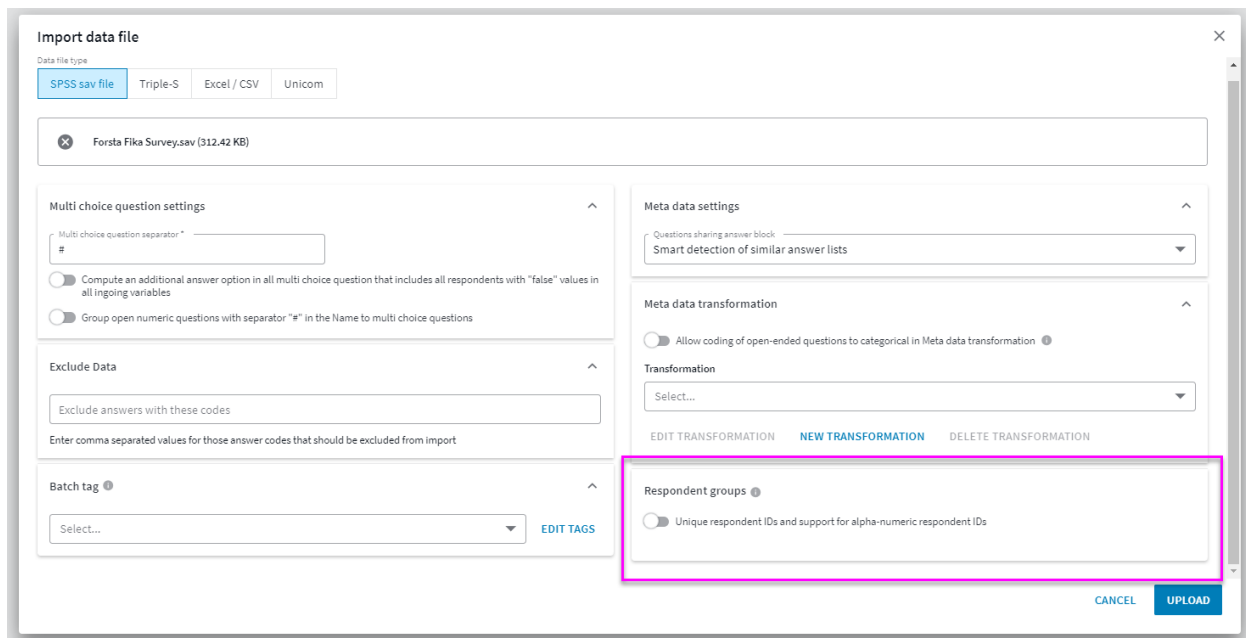
Tip!

Sort your exported file by Question code and Date to clearly see the latest changes for each variable

7.Data connectivity

7.1 Support unique Respondent id based on source

In Forsta Visualizations, each project requires unique respondent IDs. This ensures precise tracking of specific respondents from data import to reporting. To enhance usability for imports from multiple surveys and also support data sets that use alphanumeric respondent IDs, we've introduced a new concept called "respondent groups." With this functionality, you can import the same respondent ID multiple times within a single project, but unique within the group, without clashes, while also adding support for alphanumeric respondent IDs.



Import data file

Data file type

SPSS sav file Triple-S Excel / CSV Unicom

Forsta Fika Survey.sav (312.42 KB)

Multi choice question settings

Multi choice question separator *

#

☐ Compute an additional answer option in all multi choice question that includes all respondents with "false" values in all ingoing variables

☐ Group open numeric questions with separator "#" in the Name to multi choice questions

Exclude Data

Exclude answers with these codes

Enter comma separated values for those answer codes that should be excluded from import

Batch tag

Select...

[EDIT TAGS](#)

Meta data settings

Questions sharing answer block

Smart detection of similar answer lists

Meta data transformation

☐ Allow coding of open-ended questions to categorical in Meta data transformation

Transformation

Select...

[EDIT TRANSFORMATION](#) [NEW TRANSFORMATION](#) [DELETE TRANSFORMATION](#)

Respondent groups

☐ Unique respondent IDs and support for alpha-numeric respondent IDs

[CANCEL](#) [UPLOAD](#)

7.1.1 How it works

When using Respondent Groups, you only need to ensure that respondent IDs within the group remains to be unique.

Forsta Visualizations will generate a new unique Respondent ID for the project, based on the Respondent ID imported alongside your chosen Respondent group. This unique ID will be used consistently throughout the reporting process.

Once used, the system will automatically create two new questions, Respondent Group and Original Respondent ID. These will store the information imported to the project, and the regular question Respondent ID will be the unique ID created by the system.

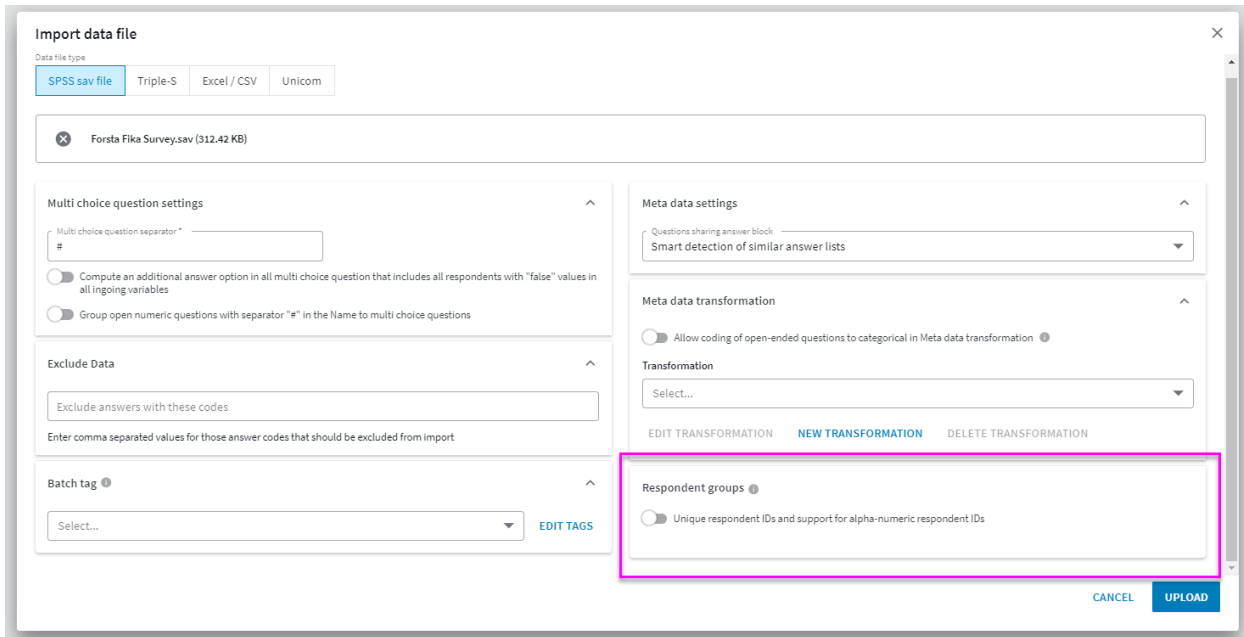
Here you see all three in a respondent table together with Date and Weight. For demonstration purposes the same file has been imported 3 times, but within different groups.

Respondent Groups	Respondent ID	Original Respondent ID	Response Date	Weight
Forsta Fika Before 2022	1	10001	2023-08-21	1
Forsta Fika 2022-2023	3001	10001	2023-08-21	1
Forsta Fika 2024	6001	10001	2023-08-21	1
Forsta Fika Before 2022	2	10002	2023-08-02	1
Forsta Fika 2022-2023	3002	10002	2023-08-02	1
Forsta Fika 2024	6002	10002	2023-08-02	1
Forsta Fika Before 2022	3	10003	2023-03-17	1
Forsta Fika 2022-2023	3003	10003	2023-03-17	1
Forsta Fika 2024	6003	10003	2023-03-17	1
Forsta Fika Before 2022	4	10004	2022-11-03	1
Forsta Fika 2022-2023	3004	10004	2022-11-03	1
Forsta Fika 2024	6004	10004	2022-11-03	1
Forsta Fika Before 2022	5	10005	2022-02-18	1
Forsta Fika 2022-2023	3005	10005	2022-02-18	1
Forsta Fika 2024	6005	10005	2022-02-18	1
Forsta Fika Before 2022	6	10006	2023-09-02	1
Forsta Fika 2022-2023	3006	10006	2023-09-02	1
Forsta Fika 2024	6006	10006	2023-09-02	1
Forsta Fika Before 2022	7	10007	2022-06-09	1
Forsta Fika 2022-2023	3007	10007	2022-06-09	1
Forsta Fika 2024	6007	10007	2022-06-09	1
Forsta Fika Before 2022	8	10008	2022-03-19	1
Forsta Fika 2022-2023	3008	10008	2022-03-19	1
Forsta Fika 2024	6008	10008	2022-03-19	1
Forsta Fika Before 2022	9	10009	2022-11-09	1
Forsta Fika 2022-2023	3009	10009	2022-11-09	1

As seen, the third column, Original Respondent ID shows the ID's that was used in the import. The first column shows the group this respondent was imported with. And the second column shows the ID that this respondent will be using within the project.

7.1.2 How to set it up

To utilize the Respondent Group functionality, enable it during the import.



Import data file

Data file type: **SPSS sav file** | Triple-S | Excel / CSV | Unicom

Forsta Fika Survey.sav (312.42 KB)

Multi choice question settings

Multi choice question separator: #

☐ Compute an additional answer option in all multi choice question that includes all respondents with "false" values in all ingoing variables

☐ Group open numeric questions with separator "*" in the Name to multi choice questions

Exclude Data

Exclude answers with these codes

Enter comma separated values for those answer codes that should be excluded from import

Batch tag

Select...

Meta data settings

Questions sharing answer block: Smart detection of similar answer lists

Meta data transformation

☐ Allow coding of open-ended questions to categorical in Meta data transformation

Transformation

Select...

EDIT TRANSFORMATION | **NEW TRANSFORMATION** | DELETE TRANSFORMATION

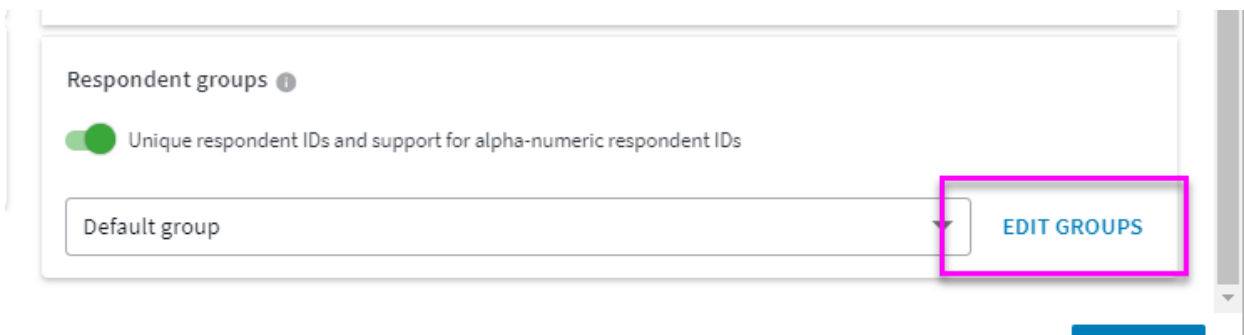
Respondent groups

☐ Unique respondent IDs and support for alpha-numeric respondent IDs

CANCEL | **UPLOAD**

Once enabled, and used in at least one import, groups always must be used. All prior imported data will by default be in the group "Default group".

To create additional groups, click on Edit Groups.



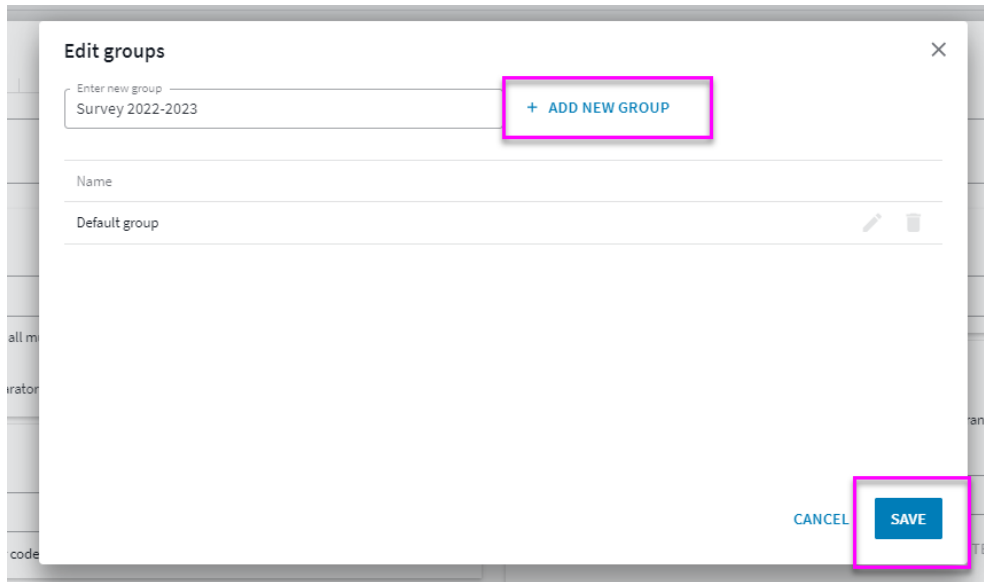
Respondent groups

☒ Unique respondent IDs and support for alpha-numeric respondent IDs

Default group ▼

EDIT GROUPS

Add the name of the group in the top left corner, click an “Add new group”, and Save.



Edit groups

Enter new group
Survey 2022-2023

+ ADD NEW GROUP

Name

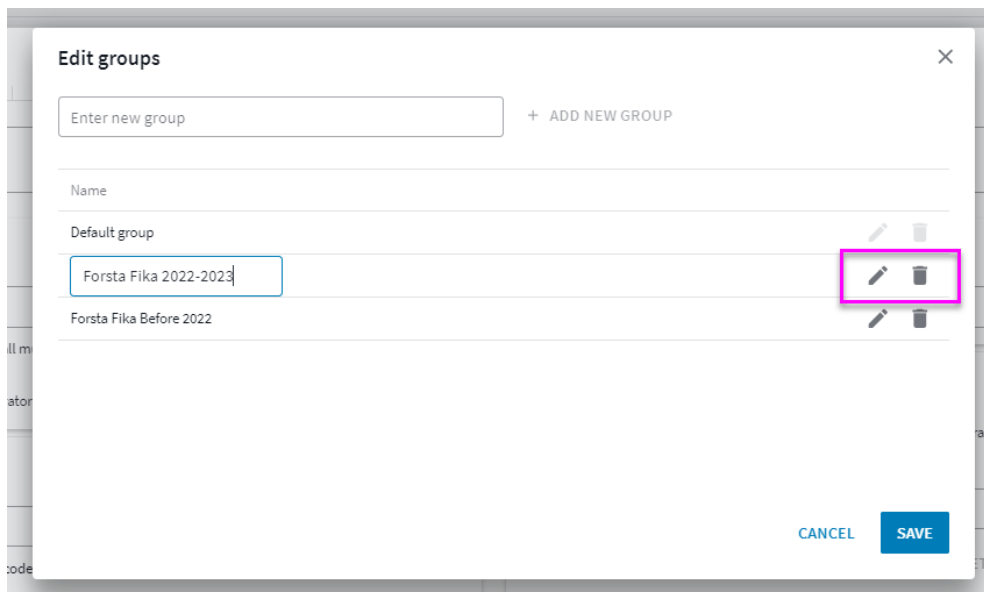
Default group

CANCEL SAVE

Under Edit groups, the name of the groups can be modified or deleted.

NOTE!

Groups used in the project can not be edited/deleted. Only unused groups can be modified.



Edit groups

Enter new group

+ ADD NEW GROUP

Name

Default group

Forsta Fika 2022-2023

Forsta Fika Before 2022

CANCEL SAVE

All saved groups will be shown in the dropdown menu.

Respondent groups ⓘ

default group ▼

Default group

Forsta Fika 2022-2023

Forsta Fika Before 2022

Forsta Fika 2024

EDIT GROUPS

When they are used in the import, each batch will show what group it belongs to.

Imported data batches

Active	ID	File name	Batch type	Respondent groups	Date	Respondents (re
Active	3	Forsta Fika Survey.sav	New Data	Forsta Fika 2024	2024-06-17 1:30 PM	3,000
Active	2	Forsta Fika Survey.sav	New Data	Forsta Fika 2022-2023	2024-06-17 1:30 PM	3,000
Active	1	Forsta Fika Survey.sav	New Data	Forsta Fika Before 2022	2024-06-17 1:29 PM	3,000

The new questions are shown on the question page and can be shown in the respondent table as well.



Forsta HX Platform

Visualizations

Forsta Fika Multiple Surveys (619786)

Data Sources

Variables

Hierarchy

Reports

Report Users

Events

Legacy Features

Project Settings

Questions

Clean & Recode

Variable Subsets

Filters vs Weights

Download/Upload Metadata

Save

Create new variable

Q Search and Replace texts

Color

Deactivate

Question blocks

Download list of unused questions

Select All

0 selected

ORD...

CODE

TEXT

TYPE

COLOR

ANSWER BLOCK

FILTER

FILTER TEXT

13

DIVisit

When was the last time you visited Forsta Fika?

Single

This week/Last week/2 weeks ago

14

BTFrequency

How often do you visit Forsta Fika?

Single

Every day/Every 6 months/Once a week

15

BTRRepeatVisit

Have you visited Forsta Fika before?

Single

Yes/No/Don't know

16

ADAdAwareness

What brands have you seen advertising for?

Multi

Forsta Fika/Espresso Express/The Busy Bean

17

CEEExperience

Good overall experience

Single

1 Strongly disagree/2/3

18

CEService

Good service

Single

1 Strongly disagree/2/3

19

CECleanliness

Cleanliness

Single

1 Strongly disagree/2/3

20

CEValue

Value for money

Single

1 Strongly disagree/2/3

21

CEtaste

Good taste

Single

1 Strongly disagree/2/3

22

CERecommend

Would you recommend Forsta Fika to a friend or a colleague?

Single

Not very likely/1/2

23

CEOpenAnswer

What do you think about Forsta Fika?

Open ended

24

SMFacebook

Do you follow Forsta Fika on Facebook?

Single

Yes/No/Don't know

25

SMTwitter

Do you follow Forsta Fika on Twitter?

Single

Yes/No/Don't know

26

SMInstagram

Do you follow Forsta Fika on Instagram?

Single

Yes/No/Don't know

27

SMUseApp

Do you use Forsta Fika's mobile app?

Single

Yes/No/Don't know

NP3

NP3

Numeric

RespondentGroups

Respondent Groups

Open ended

OriginalRespondentID

Original Respondent ID

Open ended

RespondentID

Respondent ID

Numeric

ResponseDate

Response Date

Date

Weight

Weight

Numeric

Respondent Groups	Respondent ID	Original Respondent ID	Response Date	Weight
Forsta Fika Before 2022	1	10001	2023-08-21	1
Forsta Fika 2022-2023	3001	10001	2023-08-21	1
Forsta Fika 2024	6001	10001	2023-08-21	1
Forsta Fika Before 2022	2	10002	2023-06-02	1
Forsta Fika 2022-2023	3002	10002	2023-06-02	1
Forsta Fika 2024	6002	10002	2023-06-02	1
Forsta Fika Before 2022	3	10003	2023-03-17	1
Forsta Fika 2022-2023	3003	10003	2023-03-17	1
Forsta Fika 2024	6003	10003	2023-03-17	1
Forsta Fika Before 2022	4	10004	2022-11-03	1
Forsta Fika 2022-2023	3004	10004	2022-11-03	1
Forsta Fika 2024	6004	10004	2022-11-03	1
Forsta Fika Before 2022	5	10005	2022-02-18	1
Forsta Fika 2022-2023	3005	10005	2022-02-18	1
Forsta Fika 2024	6005	10005	2022-02-18	1
Forsta Fika Before 2022	6	10006	2023-06-02	1
Forsta Fika 2022-2023	3006	10006	2023-06-02	1
Forsta Fika 2024	6006	10006	2023-06-02	1
Forsta Fika Before 2022	7	10007	2022-06-06	1
Forsta Fika 2022-2023	3007	10007	2022-06-06	1
Forsta Fika 2024	6007	10007	2022-06-06	1
Forsta Fika Before 2022	8	10008	2022-03-19	1
Forsta Fika 2022-2023	3008	10008	2022-03-19	1
Forsta Fika 2024	6008	10008	2022-03-19	1
Forsta Fika Before 2022	9	10009	2022-11-09	1
Forsta Fika 2022-2023	3009	10009	2022-11-09	1



8.Project administration

8.1 Customer overview page

In our latest version, we've introduced a new page that provides an overview of your customer account. As shown in the image below, aggregated metrics such as the renewal date, number of admins, number of report users, number of projects, number of respondents, and number of data points are displayed. The new page can be found in the main left menu before any projects have been entered.

ForstaHX Platform

Visualizations

Switch to old interface

Projects

Users

Global Templates

Overview

Customer Overview

Forsta Fika

Customer renewal

2024-06-11

Admin users

3

Report users

0 out of 0

Projects

1

Published

1

Draft

0

Respondents

9.00 K

Published

6.00 K

Draft

0

Active

3.00 K

Not active

0

Data points

Published

459.02 K

Draft

0

Imported

231.01 K

Activated

0

Admin Users (3)						
Username	First name	Last name	Email	Expiry date	# Login last 30 days	
Emma.Andersson	Emma	Andersson	Emma.Andersson@ForstaFik...	2031-01-05	0	
Charles.Smith	Charles	Smith	Charles.Smith@ForstaFika.co...	2031-01-05	0	
Sandra.Adams	Sandra	Adams	Sandra.Adams@ForstaFika.c...	2031-01-05	0	

The different metrics shown on the page are:

[Customer name](#)

What customer name your admin is connected to is shown at the top of the page.

[Customer renewal](#)

The date our system has as the customers renewal date.

[Admin users](#)

The total number of Admin users this customer has.

[Report users](#)

The total number of Report users this customer is utilizing and the total number of Report users this customer can invite to the system.

[Projects](#)

The total number of projects that are connected to this customer. This metric is also divided into Published vs Draft for transparency.

[Respondents](#)

The total number of Respondents imported to projects connected to this customer. This metric is also divided into Published vs Drafts, and Inactive vs Activated respondents.

[Data points](#)

The total number of Data points imported to projects connected to this customer. This metric is also divided into Published vs Drafts, and Imported vs Activated datapoints.

Activated datapoints includes data that is created in the system, such as Computes and Grouped answers.