

Forsta Visualizations February 2023 Release



Table of Contents

Forsta Visualizations February 2023 Release	1
1 Introduction	3
2 Overview	4
3 Cross Table tool	5
3.1 Saving Applied Value Sorting in Workbooks	5
4 Textboxes in StoryTeller and StoryCreator	6
4.1 New Text Alignment Option.....	6
5 Connecting import schedulers	7
5.1 Connecting Import Schedulers to execute in a Specific Order	7
5.2 Step-by-Step Guide.....	7
6 Importing Forsta Surveys from SmartHub	9
6.1 Improved Survey Import Functionality	9
7 Report user administration.....	10
7.1 Enhanced User Invitation History Page.....	10
8 Data Import Batches and Logic	11
8.1 Summary of Changes to Activation Logic.....	11



1 Introduction

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

The February 2023 update of Forsta Visualizations includes several significant improvements. Please see the summary below.

Cross Table tool

- Saving a workbook now saves any applied value sorting, increasing efficiency by eliminating the need to reapply sorting each time the workbook is reopened.

Textboxes in StoryTeller and StoryCreator

- A new text alignment option called "Justify" has been added to text boxes, in addition to the existing left-, right-, and center-aligned options. Using Justify alignment creates a clear and professional appearance and enhances the readability of long texts.

Connecting import schedulers

- This new feature enables the execution of multiple scheduled import jobs in a sequence, making it useful for projects that require importing multiple files in a specific order.

Importing Forsta Surveys from SmartHub

- Users can now import Forsta Surveys stored in SmartHub (Forsta Plus) into Vizualizations, resulting in a more connected and comprehensive experience between the two.

Report user administration

- The user invitation history page has been updated with a clearer overview of sent invites and easier user search. All invite information is now visible in the same view, eliminating the need to expand each row to see details such as user name, first name, and last name.

Data Import Batches and Logic

- The activation logic for "Updates to existing" has been updated and the names of the existing options have been reclarified to make it clearer what they do. We have also improved and added messages around activation.



3 Cross Table tool

3.1 Saving Applied Value Sorting in Workbooks

Saving a workbook now saves any applied value sorting, increasing efficiency by eliminating the need to reapply sorting each time the workbook is reopened.

Below is an example of a table sorted by the value of the Total column.

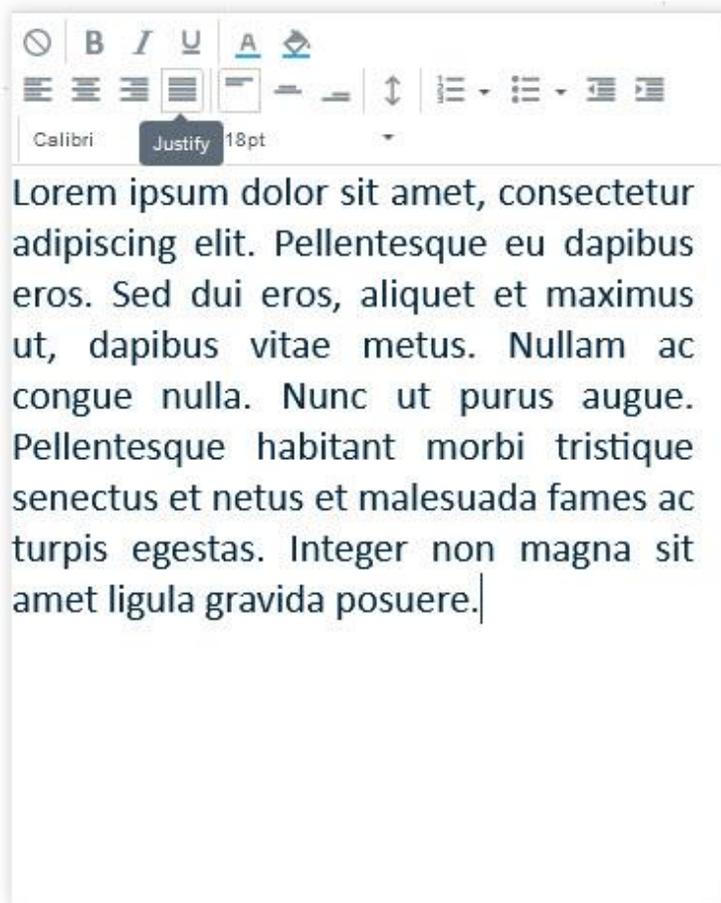
		Gender		Total
		Man	Woman	Total
		%	%	%
Spontaneous brand awareness - Top of mind	Sweet Talk	10.3	15.8	13.1
	Tel Me More	12.0	6.7	9.3
	Telecom for You	9.2	7.0	8.1
	Duty Calls	5.4	9.3	7.4
	Swedish Telecom	7.9	5.4	6.6
	Four	4.1	6.4	5.3
	WTC	4.0	5.5	4.8
	DonkyCom	2.9	4.6	3.7
	Donut Call	2.2	4.4	3.3

4 Textboxes in StoryTeller and StoryCreator

4.1 New Text Alignment Option

A new text alignment option called "Justify" has been added to text boxes, in addition to the existing left-, right-, and center-aligned options. Using Justify alignment creates a clear and professional appearance and enhances the readability of long texts.

Here is an example showcasing the new "Justify" option



5 Connecting import schedulers

5.1 Connecting Import Schedulers to execute in a Specific Order

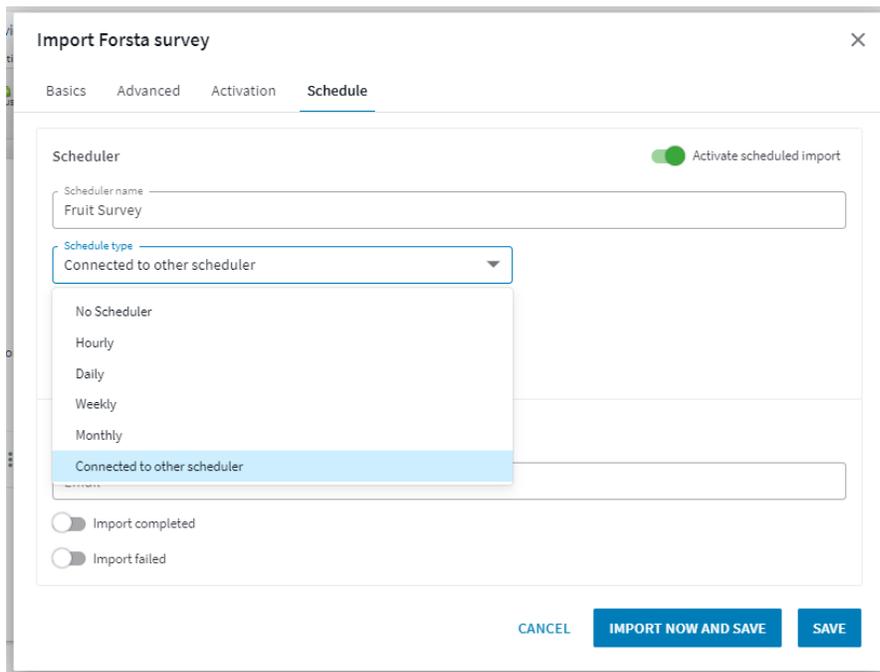
This new feature enables the execution of multiple scheduled import jobs in a specific order, making it useful for projects that require importing multiple files in a sequence. Instead of setting a specific time for each import, users can specify that import 2 should occur once import 1 is finished, import 3 should occur once import 2 is finished, and so on.

This feature ensures that errors in imports due to previous tasks not finishing on time are eliminated. Additionally, users can specify that the system should not import the second file if the previous one failed, which is important when the order of files is critical.

5.2 Step-by-Step Guide

Once a scheduler is saved, all additional schedulers have the option to be connected to other schedulers via the "Scheduled Type" dropdown menu. Once selected, two new dropdowns appear: "Existing Schedulers" and "Behavior."

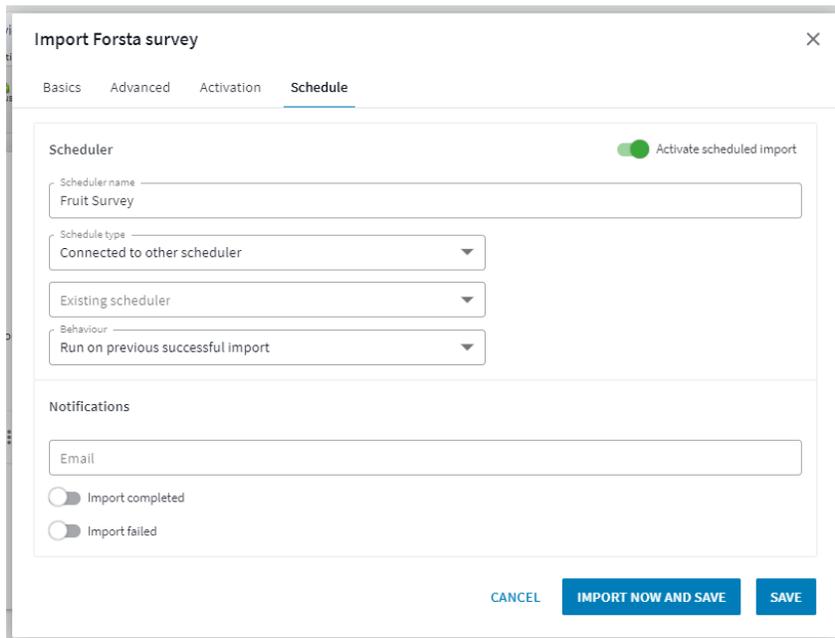
Here is an example of setup



The "Existing Schedulers" dropdown shows all unconnected schedulers or schedulers that are at the end of the chain in the project, allowing users to select the scheduler that should be executed before the current one.

The "Behavior" dropdown determines the logic for the connection, offering two options: "Run on previous successful import" or "Run always."

Below is an example showing the new dropdowns



Note: Schedulers that are in the middle or beginning of the chain cannot be deleted, only end-of-chain schedulers and stand-alone schedulers can be deleted.



6 Importing Forsta Surveys from SmartHub

6.1 Improved Survey Import Functionality

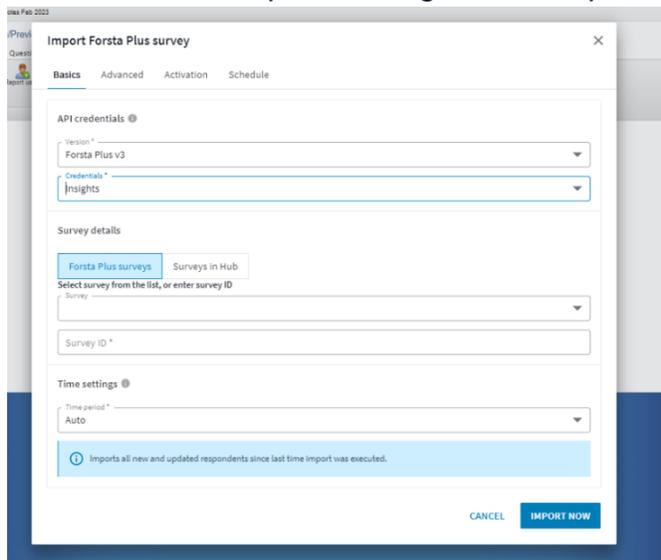
Users can now import Forsta Surveys stored in SmartHub (Forsta Plus) into Vizualizations, resulting in a more connected and comprehensive experience between the two.

Note: Forsta Plus surveys still need to be imported through the "Forsta Plus Surveys" functionality. Only Forsta Surveys can be imported from the option "Surveys in Hub".

The ability to import surveys from SmartHub allows users to connect to all of our survey collecting tools, regardless of where they are stored. Note that the same survey can still be imported from Forsta Surveys directly.

In the basic Forsta Plus import, there is now an option to select from surveys stored in SmartHub. The "Surveys in Hub" feature allows users to see all Hubs to which they have access and to search within each Hub to display all available surveys. Currently, only Forsta Surveys are displayed.

Below is an example showing this new option



Note: Due to API limits, additional settings such as filter options, hierarchy import, and weight models are turned off when using "Surveys in Hub." All respondents will be included in every import.



7 Report user administration

7.1 Enhanced User Invitation History Page

The user invitation history page has been updated with a clearer overview of sent invites and easier user search.

All invite information is now visible in the same view, eliminating the need to expand each row to see details such as user name, first name, and last name.

Here is an example of the new layout of the user invitation history page

Invite History

Search: Show 10 entries

DATE	FIRST NAME	LAST NAME	EMAIL ADDRESS	USERNAME	INVITED BY
2023-02-13	Paul	Kane	Paul.Kane@example.com	Paul.Kane@example.com	Testuser Testuser
2023-02-13	Lisa	Karlsson	Lisa.Karlsson@example.com	Lisa.Karlsson@example.com	Testuser Testuser
2023-02-13	Olle	Nilsson	Olle.Nilsson@example.com	Olle.Nilsson@example.com	Testuser Testuser
2023-02-13	Sam	Smith	Sam.Smith@example.com	Sam.Smith@example.com	Testuser Testuser
2023-02-13	Robert	Sten	Robert.Sten@example.com	Robert.Sten@example.com	Testuser Testuser



8 Data Import Batches and Logic

The activation logic for “Updates to existing” has been updated and the names of the existing options have been reclarified to make it clearer what they do. We have also improved and added messages around activation, making it easier to understand what the different batch types are doing and how they work and finding/correcting mistakes.

8.1 Summary of Changes to Activation Logic

8.1.1 Option Names

The names of options have been updated, from old to new:

- New data set > New data set
- Updates to existing date set > Updates to existing data sets
- New data set and updates to existing data sets > New data and replace data

Info text has also been added to the import page, so you what they should be used for.

8.1.2 Activation Logic

Previously, updates to existing files could in certain circumstances affect data batches that were imported and activated after the update batch. This could create confusion and issues when batches needed to be replaced and inactivated. For example, if the files were imported in the wrong order, you couldn’t activate the update file, since the system compared the RespID’s in already activated data with the RespID’s in the update file. In this release we have improved the activation logic for these update files, and the activation will continue even if the RespID is missing from the regular data files. If there are one or more respondent IDs that have not been imported and are activated in a batch before the update batch, they will be ignored in the database for the activated data; they will never be displayed in the report.

The disregarded respondents will be displayed in a popup message during activation, displaying what batches and RespID’s are missing. If you are using scheduled import, the information will be added in the log when activation is selected. The upcoming message will display;

“Please note that there are Respondents in the “Update to existing” file that does not exist in any earlier imported and activated data file. This means that the data on these respondents won’t be used. If this file should update any activated respondents, make sure to import this “Update to existing” file after the original data file. Batch ID: [X] – Respondent ID’s: [X]”



Example 1:

RespID used as key

Here we see 3 data batches. Batch 1 is New data, batch 2 is an Update to existing, and batch 3 is a new data batch. We see that the resp 12-14 in our update batch, the red marked, will never be used because they are imported as an update file before the main resp are imported:

Batch 1 (New data)

RespID	Q1	Q2
1	Yes	Sweden
2	No	Germany
3	Yes	Sweden
4	Yes	Sweden
5	Yes	UK
6	Yes	UK
7	No	US
8	No	Canada
9	Yes	Sweden
10	Yes	Sweden

Batch 2 (Updates to existing)

RespID	Q1
1	No
3	No
12	No
13	No
14	No

Batch 3 (New data)

RespID	Q1	Q2
11	No	Canada
12	Yes	US
13	Yes	UK
14	Yes	US
15	Yes	Canada
16	Yes	Canada

Active data set

RespID	Q1	Q2
1	Yes	Sweden
2	No	Germany
3	Yes	Sweden
4	Yes	Sweden
5	Yes	UK
6	Yes	UK
7	No	US
8	No	Canada
9	Yes	Sweden
10	Yes	Sweden

Active data set

RespID	Q1	Q2
1	No	Sweden
2	No	Germany
3	No	Sweden
4	Yes	Sweden
5	Yes	UK
6	Yes	UK
7	No	US
8	No	Canada
9	Yes	Sweden
10	Yes	Sweden

Active data set

RespID	Q1	Q2
1	No	Sweden
2	No	Germany
3	No	Sweden
4	Yes	Sweden
5	Yes	UK
6	Yes	UK
7	No	US
8	No	Canada
9	Yes	Sweden
10	Yes	Sweden
11	No	Canada
12	Yes	US
13	Yes	UK
14	Yes	US
15	Yes	Canada
16	Yes	Canada



Example 2:

RespID used as key

Here we see the same example, but batch ID 2 is a “New data and replace” and the Update to existing is batch 3. RespID 12, 13 and 14 will now also be updated, as they have already been imported and activated in a previous file:

Batch 1 (New data)

RespID	Q1	Q2
1	Yes	Sweden
2	No	Germany
3	Yes	Sweden
4	Yes	Sweden
5	Yes	UK
6	Yes	UK
7	No	US
8	No	Canada
9	Yes	Sweden
10	Yes	Sweden

Batch 2 (New and replace data)

RespID	Q1	Q2
1	Yes	Canada
2	Yes	Norway
3	Yes	Germany
11	No	Canada
12	Yes	US
13	Yes	UK
14	Yes	US
15	Yes	Canada
16	Yes	Canada

Batch 3 (Updates to existing)

RespID	Q1
1	No
3	No
12	No
13	No
14	No

Active data set

RespID	Q1	Q2
1	Yes	Sweden
2	No	Germany
3	Yes	Sweden
4	Yes	Sweden
5	Yes	UK
6	Yes	UK
7	No	US
8	No	Canada
9	Yes	Sweden
10	Yes	Sweden

Active data set

RespID	Q1	Q2
1	Yes	Canada
2	Yes	Norway
3	Yes	Germany
4	Yes	Sweden
5	Yes	UK
6	Yes	UK
7	No	US
8	No	Canada
9	Yes	Sweden
10	Yes	Sweden
11	No	Canada
12	Yes	US
13	Yes	UK
14	Yes	US
15	Yes	Canada
16	Yes	Canada

Active data set

RespID	Q1	Q2
1	No	Canada
2	Yes	Norway
3	No	Germany
4	Yes	Sweden
5	Yes	UK
6	Yes	UK
7	No	US
8	No	Canada
9	Yes	Sweden
10	Yes	Sweden
11	No	Canada
12	No	US
13	No	UK
14	No	US
15	Yes	Canada
16	Yes	Canada



Example 3:

Q2 used as key

Here we see that Resp 11-16 will not get the data from batch two, even if it's connected to Q2. This is because it is imported after our updates to existing.

However, if batch 3 was imported before, these respondents would also be updated:

Batch 1 (New data)			Batch 2 (Updates to existing)		Batch 3 (New data)		
RespID	Q1	Q2	Q2	Q1	RespID	Q1	Q2
1	Yes	Sweden	Sweden	No	11	No	Canada
2	No	Germany	Germany	Yes	12	Yes	US
3	Yes	Sweden	UK	No	13	Yes	UK
4	Yes	Sweden	US	Yes	14	Yes	US
5	Yes	UK			15	Yes	Canada
6	Yes	UK			16	Yes	Canada
7	No	US					
8	No	Canada					
9	Yes	Sweden					
10	Yes	Sweden					

Active data set			Active data set			Active data set		
RespID	Q1	Q2	RespID	Q1	Q2	RespID	Q1	Q2
1	Yes	Sweden	1	No	Sweden	1	No	Sweden
2	No	Germany	2	Yes	Germany	2	Yes	Germany
3	Yes	Sweden	3	No	Sweden	3	No	Sweden
4	Yes	Sweden	4	No	Sweden	4	No	Sweden
5	Yes	UK	5	No	UK	5	No	UK
6	Yes	UK	6	No	UK	6	No	UK
7	No	US	7	Yes	US	7	Yes	US
8	No	Canada	8	No	Canada	8	No	Canada
9	Yes	Sweden	9	No	Sweden	9	No	Sweden
10	Yes	Sweden	10	No	Sweden	10	No	Sweden
						11	No	Canada
						12	Yes	US
						13	Yes	UK
						14	Yes	US
						15	Yes	Canada
						16	Yes	Canada