

Forsta Visualizations March 2024 Release



- Forsta Visualizations March 2024 Release..... 1
 - 1.Introduction 3
 - 2.Overview..... 4
 - 3.StoryTeller 10
 - 3.1 Optional filter setup - inherit settings from other reports 10
 - 3.2 New chart – Funnel..... 12
 - 3.3 Hide Significance test symbols in objects (StoryTeller and StoryCreator) 13
 - 4.CrossTable tool 14
 - 4.1 Crosstab, new table type: Grid view 14
 - 5.Data management 17
 - 5.1 Delete meta data transformations..... 17
 - 6.Data connectivity..... 19
 - 6.1 Language support - HX Platform import 19
 - 7.Project administration..... 21
 - 7.1 Global header - Add "Recent projects" in header..... 21



1.Introduction

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

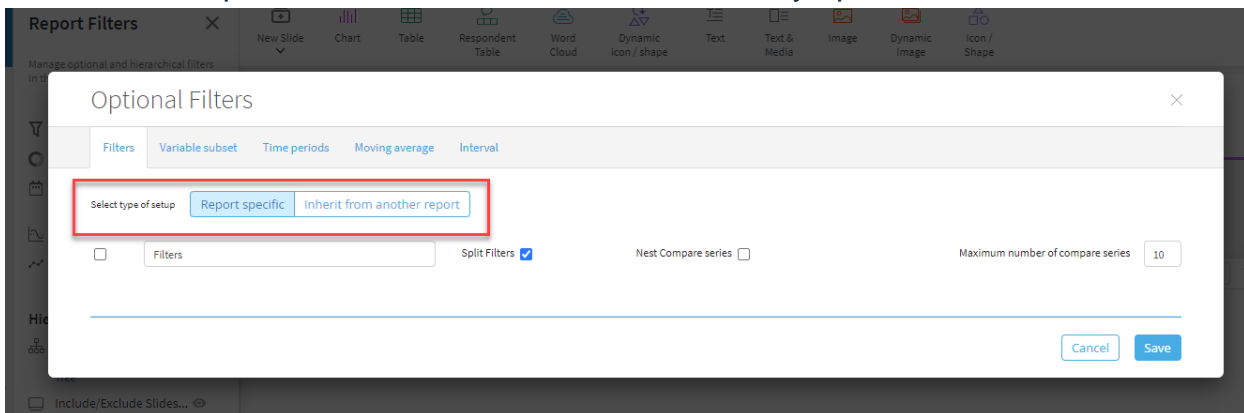


2. Overview

StoryTeller

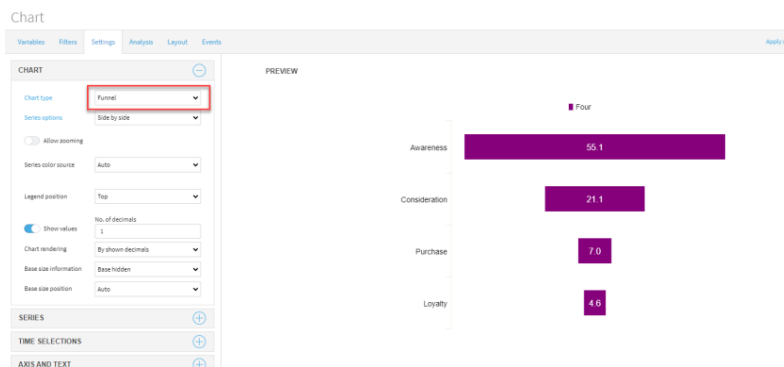
- Optional filter setup - inherit settings from other reports

In order to streamline the setup and maintenance process for Optional Filter settings across all StoryTeller reports, we've introduced an option to inherit settings from a specific report. Rather than modifying what filters to be shown or the default answer option in multiple reports individually, you can now make changes in the "parent" report, and all other reports connected to it will be automatically updated.



- New chart – Funnel

In order to streamline project setup in Forsta Visualizations, we pinpointed certain visualizations that required multiple objects to achieve the desired appearance. Among these, funnel charts stood out. To address this challenge, we've introduced a new chart type known as the "funnel chart," which enables the creation of a funnel visualization within a single object.

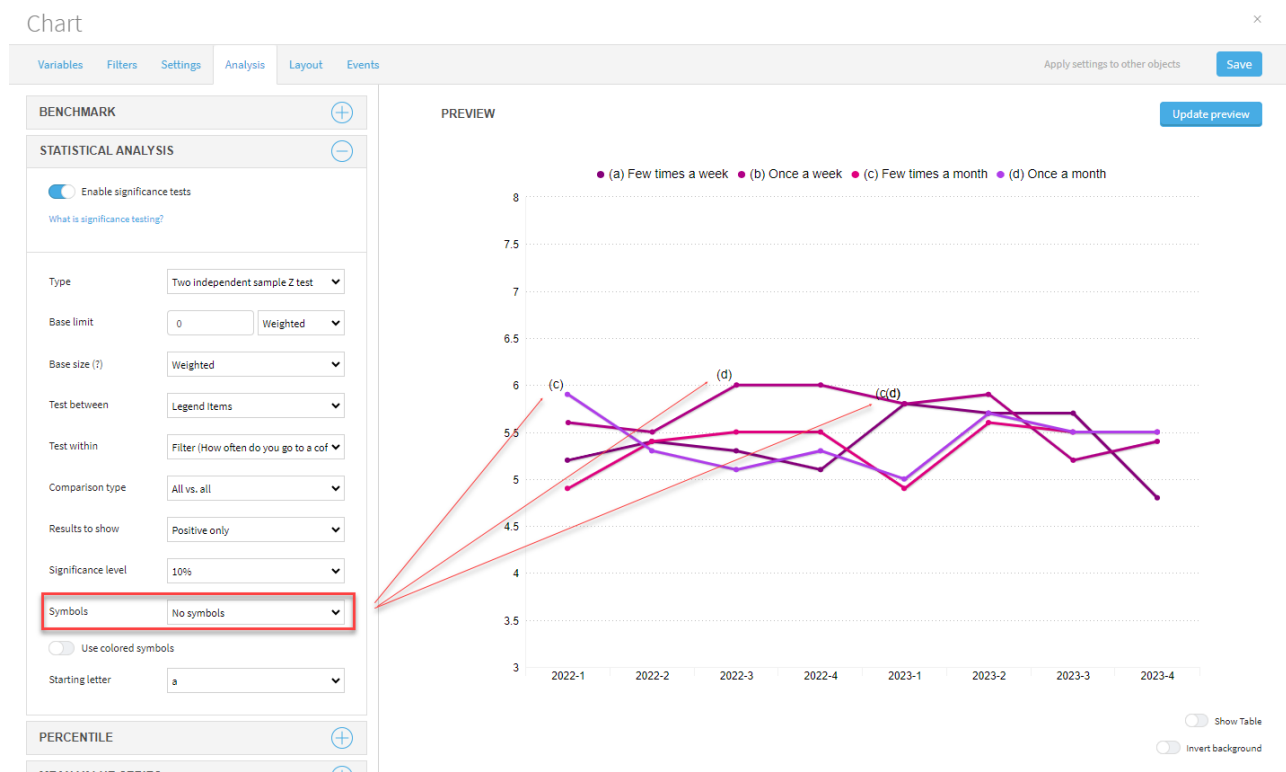




- Hide Significance test symbols in objects (StoryTeller and StoryCreator)

When displaying significance in specific layouts, it is unnecessary to include symbols denoting positive or negative outcomes. Since the test will reveal only one outcome at a time, a simple letter indicating the significant column or row is sufficient.

To address this, a new feature has been implemented that allows for the omission of symbols, resulting in a tidier and more streamlined presentation. This enhancement will be accessible in both StoryTeller and StoryCreator.





Cross Table tool

- Crosstab, new table type: Grid view

When using Grid questions within the CrossTable Tool, the questions and answers have traditionally been displayed in the same position (either rows or columns). However, this approach doesn't always provide a comprehensive overview of the question, and it doesn't match the display format used in the questionnaire. To address this, we've introduced a "grid view mode" for our CrossTable tool. This mode can be selected at the sheet level, effectively transforming the sheet into a grid format. The flexibility remains, allowing you to mix different modes within your workbooks.

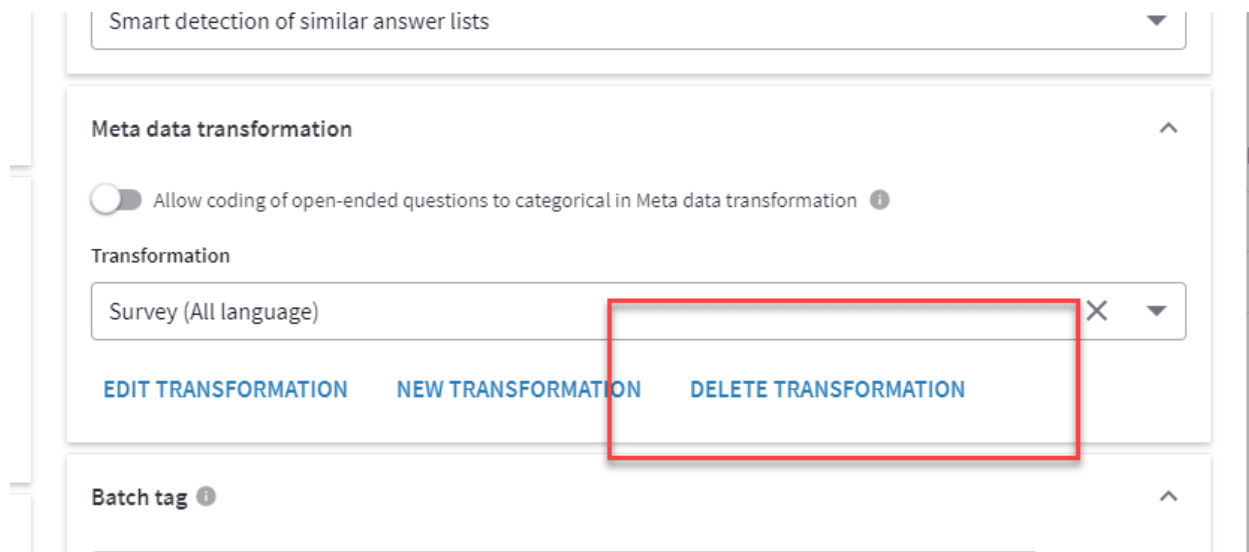
The screenshot shows the CrossTable tool interface. At the top, there are tabs for 'Rows, Columns and Filters', 'Calculations', and 'Generate table (55 cells)'. Below the tabs is a toolbar with various icons for editing and viewing. The main area is titled 'Sheet 1' and shows a time period of '2023-01-01 to 2024-12-28'. The data is presented in a grid format with the following columns and rows:

	1 Strongly disagree	2	3	4	5	6	7	8	9	10 Strongly Agree	Unweighted base
Good overall experience	4.8	10.1	11.5	11.3	11.4	11.4	10.8	10.9	11.6	6.1	3 000
Good service	5.5	10.1	11.6	11.6	11.8	10.9	11.1	10.2	11.3	5.9	3 000
Cleanliness	5.6	10.9	11.7	11.3	11.0	10.7	11.3	11.0	10.8	5.8	3 000
Value for money	5.0	11.3	10.6	10.5	12.2	11.7	11.3	11.4	11.2	5.0	3 000
Good taste	5.6	10.1	11.2	12.1	10.3	10.8	11.8	11.6	11.2	5.3	3 000

Data management

- Delete meta data transformations

In long-running projects, numerous Meta Data Transformations (MDT) may have been created and utilized, even though they are currently inactive. Unfortunately, these unused MDT cannot be deleted, which can lead to problems if an incorrect one is chosen during data import. To address this issue and maintain only necessary MDT, we've introduced an option to delete unused MDT from the system.





Data connectivity

- Language support - HX Platform import

When collecting surveys within Forsta HX Platform, respondents have the option to answer in their preferred language due to survey translations. However, these translations, originally created in our HX Platform, were not previously importable into Forsta Visualizations - only the default language was supported.

To address this limitation and leverage existing survey work, we've introduced a new feature. Now, during the import process from HX Platform to Forsta Visualizations, additional languages can be included, ensuring no redundance tasks to be done.

The screenshot shows a dialog box titled "Import data from Forsta HX Platform" with tabs for Basics, Advanced, Activation, and Schedule. The Basics tab is active. It contains sections for API credentials, Survey details, and Languages. The Languages section is highlighted with a red border and includes a dropdown for "Main language" (set to English) and a dropdown for "Additional languages" (set to "Select..."). Below these are checkboxes for Spanish, French, French (Standard), and Swedish. At the bottom, there is a "CANCEL" button and an "IMPORT NOW" button. A note at the bottom states: "Imports all new and updated respondents since last time import was executed."



Project administration

- Global header - Add "Recent projects" in header

In our global header, we've added a convenient "shortcut" for recently visited projects. This feature allows you to quickly switch between projects you've accessed recently. The shortcut displays the last 10 projects, along with icons indicating their availability status. Even deleted or archived projects will appear in the list.

The screenshot shows the Forsta HX Platform interface. A dropdown menu is open, displaying a list of recent projects. The menu is titled "Forsta Fika (812670)" and includes a "New project" button and a "Recent projects" section. The recent projects listed are:

- Forsta Fika (812670) - Locked icon
- Loops (816501) - Locked icon
- Funnel Release (816812) - Locked icon

Below the dropdown, there is a table of imported data batches:

Active	ID	File name
<input checked="" type="checkbox"/>	1	Forsta Fika Survey.sav

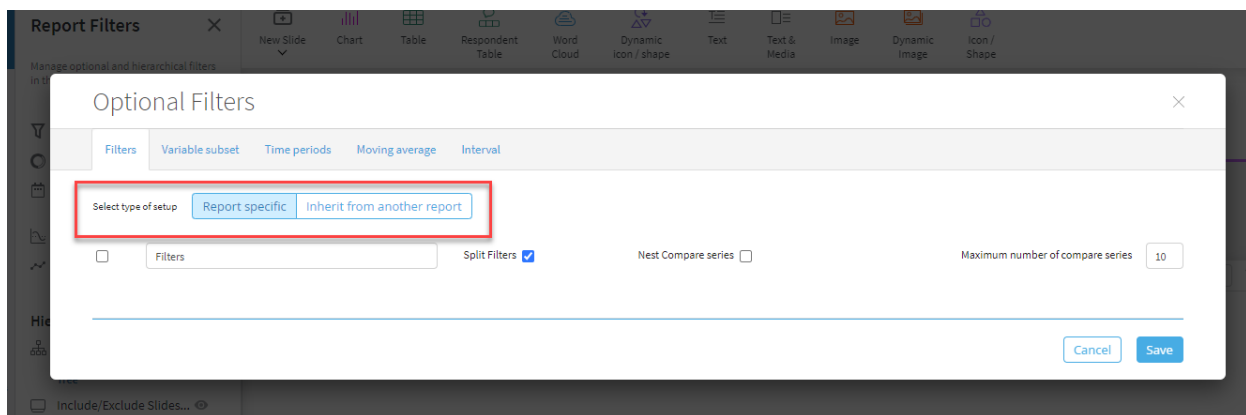


3. StoryTeller

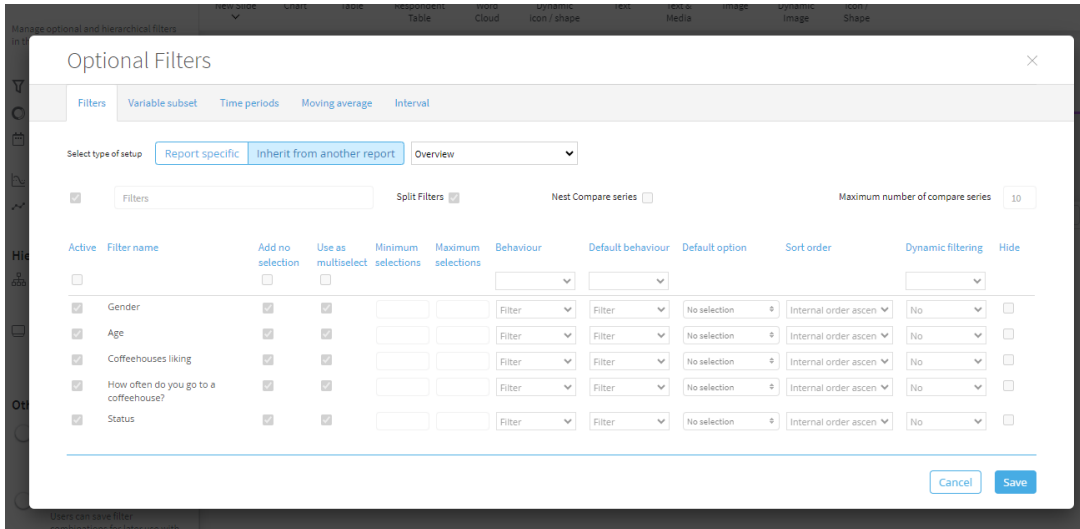
3.1 Optional filter setup - inherit settings from other reports

In order to streamline the setup and maintenance process for Optional Filter settings across all StoryTeller reports, we've introduced an option to inherit settings from a specific report. Rather than modifying what filters to be shown or the default answer option in multiple reports individually, you can now make changes in the "parent" report, and all other reports connected to it will be automatically updated.

Reports can inherit settings for Filters, Variable subsets, Time periods, Moving average, Interval and Hierarchical filters.



In the setup of the different optional filters, the option to "Inherit from another report" is shown to the right of "Report specific" setup. The report specific setup is default for all reports, and with this option, each report has its own setup. By selecting "Inherit from another report" a dropdown list will be shown and listing all reports with this specific feature enabled, and by selecting a report in the list, the current report will get linked to the parent report and get the same setup.

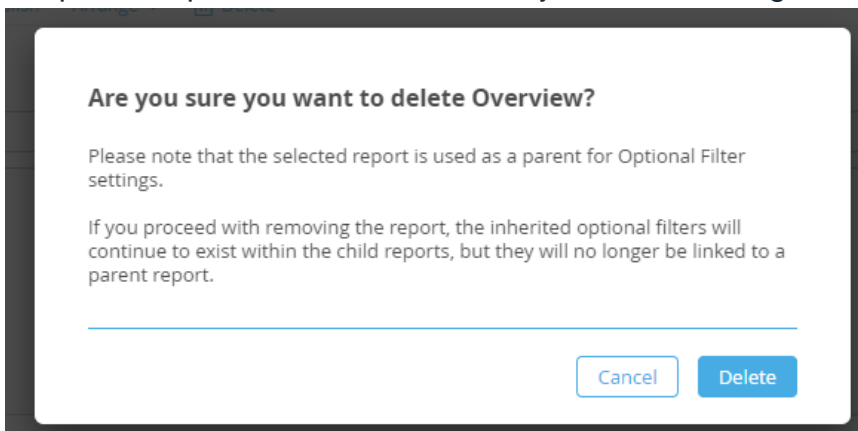


Tip!

Create your filter setup in 1 report first, and link all additional report to it, to minimize the time to maintain filter setup.

If a report is “unlinked”, the setup will be copied to current report, but any changes to the parent report won’t update the unlinked report.

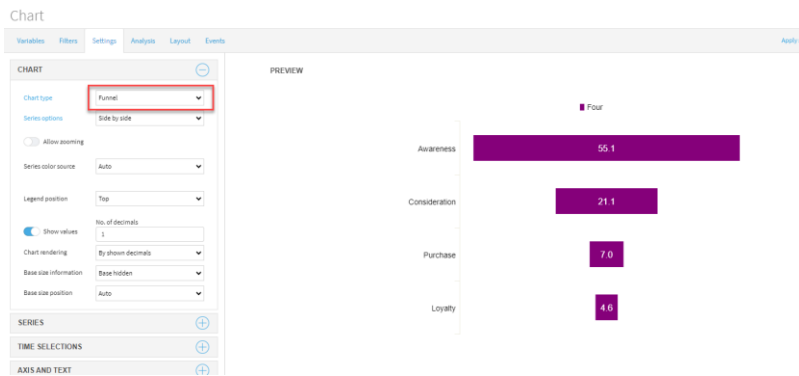
If a parent report is deleted from the system, a warning message will be shown.





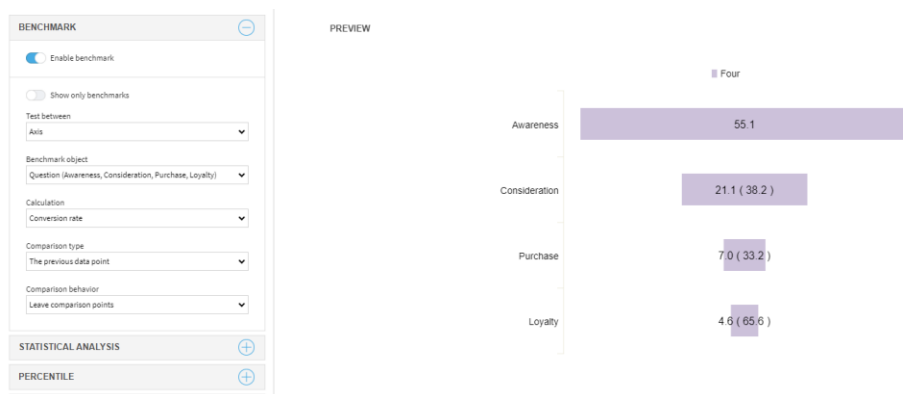
3.2 New chart – Funnel

In order to streamline project setup in Forsta Visualizations, we pinpointed certain visualizations that required multiple objects to achieve the desired appearance. Among these, funnel charts stood out. To address this challenge, we've introduced a new chart type known as the “funnel chart,” which enables the creation of a funnel visualization within a single object.



To activate the funnel view, simply choose “Funnel” from the “Chart type” dropdown in your chart object settings. As a result, the bars will automatically align at the center, and the value labels will be positioned in the middle of each bar.

Additionally, you can include benchmarks for the bars, following the same approach as with a regular bar chart. The benchmark values will appear within brackets next to the corresponding data points.

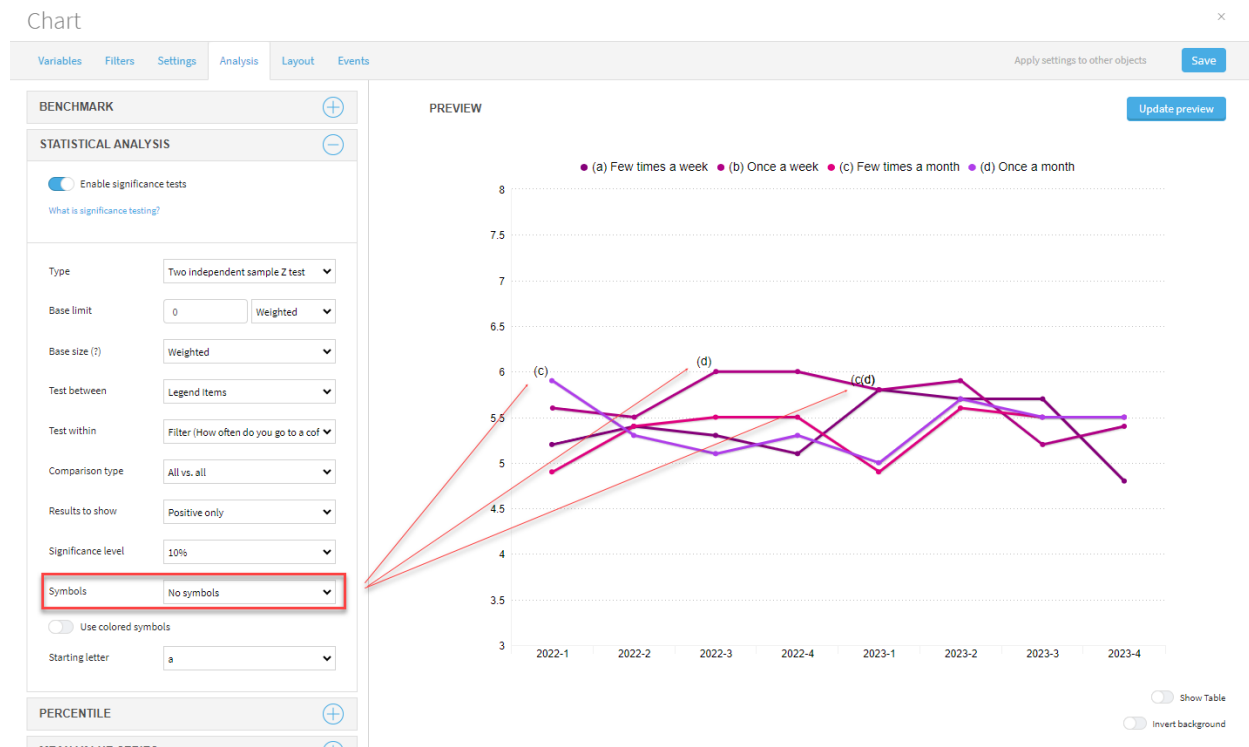




3.3 Hide Significance test symbols in objects (StoryTeller and StoryCreator)

When displaying significance in specific layouts, it is unnecessary to include symbols denoting positive or negative outcomes. Since the test will reveal only one outcome at a time, a simple letter indicating the significant column or row is sufficient.

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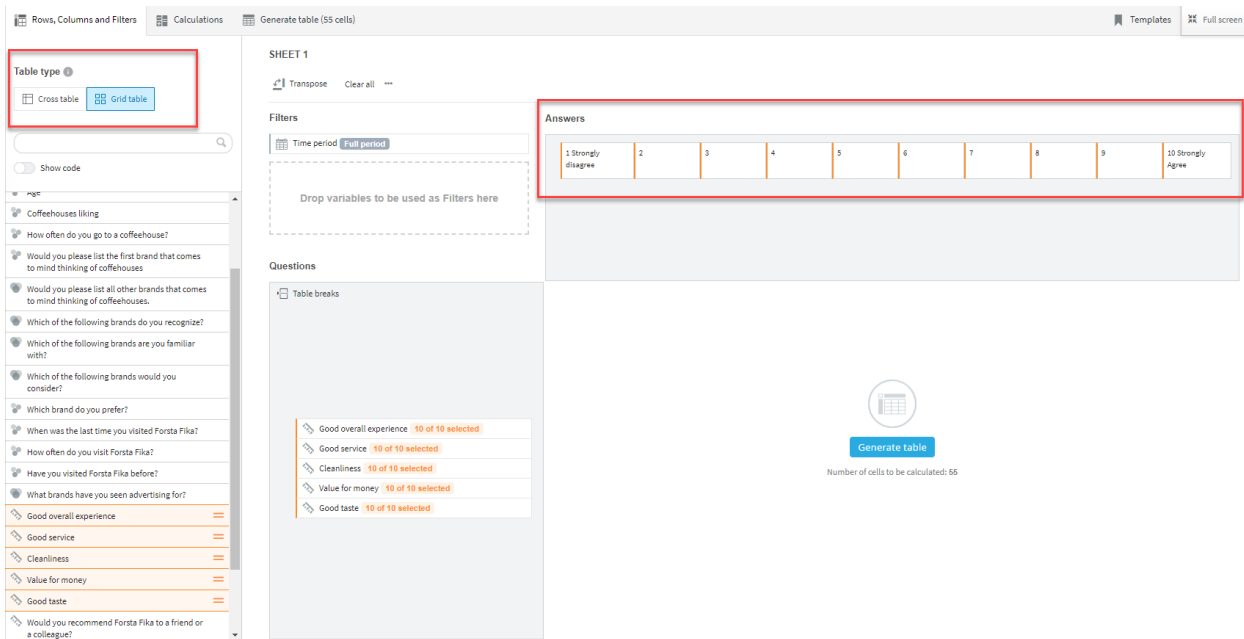




4. CrossTable tool

4.1 Crosstab, new table type: Grid view

When using Grid questions within the CrossTable Tool, the questions and answers have traditionally been displayed in the same position (either rows or columns). However, this approach doesn't always provide a comprehensive overview of the question, and it doesn't match the display format used in the questionnaire. To address this, we've introduced a "grid view mode" for our CrossTable tool. This mode can be selected at the sheet level, effectively transforming the sheet into a grid format. The flexibility remains, allowing you to mix different modes within your workbooks.





The definition of “Cross table” versus “Grid table” is:

Cross table:

Create tables by adding questions and splits to define rows and columns. Both categorical and numeric variables can be used as questions in the table.

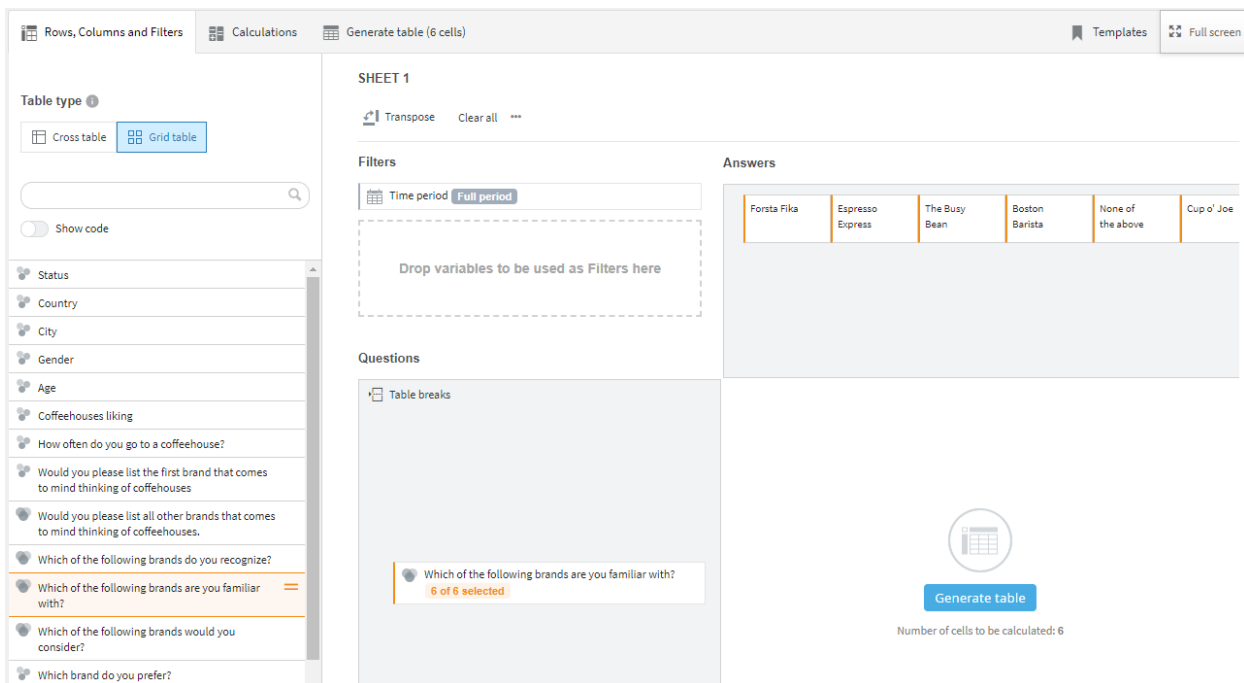
Grid table:

Build tables by adding categorical questions to rows; the corresponding answers are automatically displayed in columns. Note that splits are not supported in Grid tables, and numeric questions cannot be used in this mode.

Only one calculation type can be used at the time, and available calculations are percentage and count.

3.1.1 How to set it up

In the upper-left corner of the “Rows, Columns, and Filters” section, you’ll find the “Table Type” option. You can choose between two options: “Cross table” and “Grid table.” When you select “Grid table,” your sheet will create tables where questions and answers are organized into rows and columns, while selecting “Cross table” maintains the traditional format, placing questions and answers in the same position.





The process to create tables are the same for Cross tables and Grid tables.

Select the desired question.

Drag it or use the context menu to drop it into the designated zone. Automatically, all answers related to the selected question will appear in the header.

To remove answers from the generated table, click the “X” directly in the header or unselect them in the context menu of the question.

Note that the order of answers follows the answer order within the question and the question order, and you cannot sort answers between different answer blocks.

Tip: For the best appearance of a grid table, consider adding questions that share the same answer block

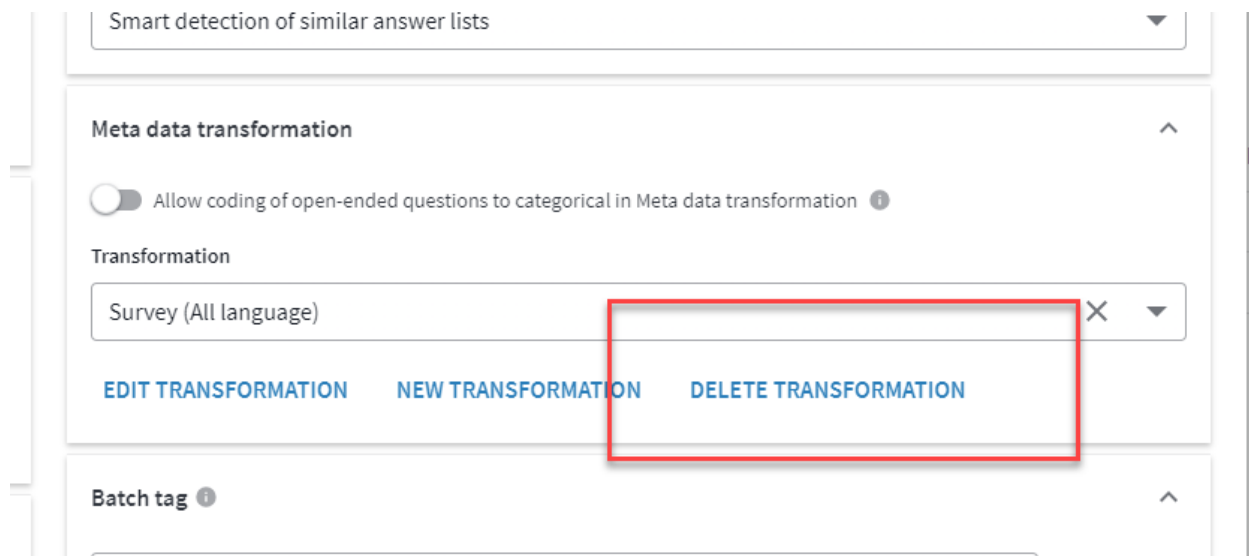
Time period: 2023-01-01 to 2024-12-28

	Forsta Fika	Espresso Express
Would you please list the first brand that comes to mind thinking of coffeehouses	8.8	16.1
Would you please list all other brands that comes to mind thinking of coffeehouses.	49.4	50.9
Which of the following brands do you recognize?	51.8	50.5
Which of the following brands are you familiar with?	51.3	49.2
Which of the following brands would you consider?	48.5	52.0

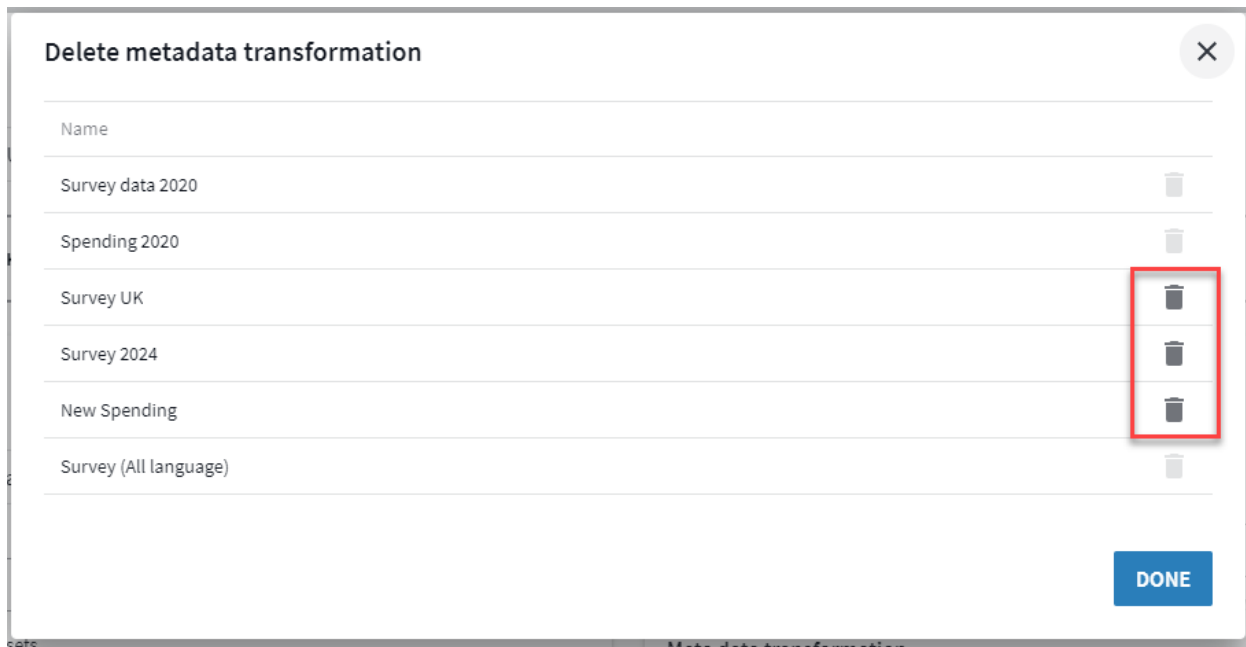
5.Data management

5.1 Delete meta data transformations

In long-running projects, numerous Meta Data Transformations (MDT) may have been created and utilized, even though they are currently inactive. Unfortunately, these unused MDT cannot be deleted, which can lead to problems if an incorrect one is chosen during data import. To address this issue and maintain only necessary MDT, we've introduced an option to delete unused MDT from the system.



The delete option will reveal a compact popup displaying all the existing MDT. Any MDT that is currently unused, meaning it is not selected for any imports, manual or scheduled tasks, can be removed directly from the user interface by clicking on the trashcan icon to the right. However, for MDT that cannot be deleted, their trashcan icons will appear greyed out.





6.Data connectivity

6.1 Language support - HX Platform import

When collecting surveys within Forsta HX Platform, respondents have the option to answer in their preferred language due to survey translations. However, these translations, originally created in our HX Platform, were not previously importable into Forsta Visualizations - only the default language was supported.

To address this limitation and leverage existing survey work, we've introduced a new feature. Now, during the import process from HX Platform to Forsta Visualizations, additional languages can be included, ensuring no redundance tasks to be done.

The screenshot shows a dialog box titled "Import data from Forsta HX Platform" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Basics** (selected), **Advanced**, **Activation**, and **Schedule**.
- API credentials**: Includes a dropdown for "Version" (Forsta HX Platform) and a dropdown for "Credentials" (Nordic).
- Survey details**: Includes tabs for "Forsta HX Platform surveys" (selected), "Surveys in Hub", and "Custom Data Tables in Hub". Below the tabs, it says "Select survey from the list, or enter survey ID". There is a dropdown for "Survey" (p326113719672 Forsta Fika Survey - Survey Designer), a text input for "Survey ID" (p326113719672), and a dropdown for "Table" (Response (Survey)).
- Languages** (highlighted with a red box): Includes a dropdown for "Main language" (English) and a dropdown for "Additional languages" (Select...). Below these are four options: Spanish, French, French (Standard), and Swedish.
- At the bottom, there is an information icon (i) and a message: "Imports all new and updated respondents since last time import was executed."
- At the bottom right, there are two buttons: "CANCEL" and "IMPORT NOW".



When you connect to your preferred survey, the default language in the HX Platform will be designated as the Main language during the import process. This means that Forsta Visualizations will use the language selected in the Main option as the primary language for reporting. Any additional languages chosen under “Additional languages” will be imported as supplementary languages, creating new language options in Forsta Visualizations based on the language name and ID from the HX Platform.

Keep in mind that your selected main language must exist in all surveys and be set as the main language for all imports within the same Forsta Visualizations project.

Here are some rules to follow:

Main Language Consistency:

Ensure that your selected main language exists in all surveys imported into your project. Set your main language as the primary language in all surveys imported into your project.

Importing Additional Languages:

When importing an additional language into an existing project, a new language will be created. The translation from that survey will be used.

If any questions or answers are missing in the project, the main language translation will be used.

Text and Label Updates:

Text and label updates for all languages will occur only when the option “Overwrite questions and answer labels in the project” is selected during import.



7. Project administration

7.1 Global header - Add "Recent projects" in header

In our global header, we've added a convenient "shortcut" for recently visited projects. This feature allows you to quickly switch between projects you've accessed recently. The shortcut displays the last 10 projects, along with icons indicating their availability status. Even deleted or archived projects will appear in the list.

