

# Forsta Visualizations

## September 2023 Release



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# 1 Introduction

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

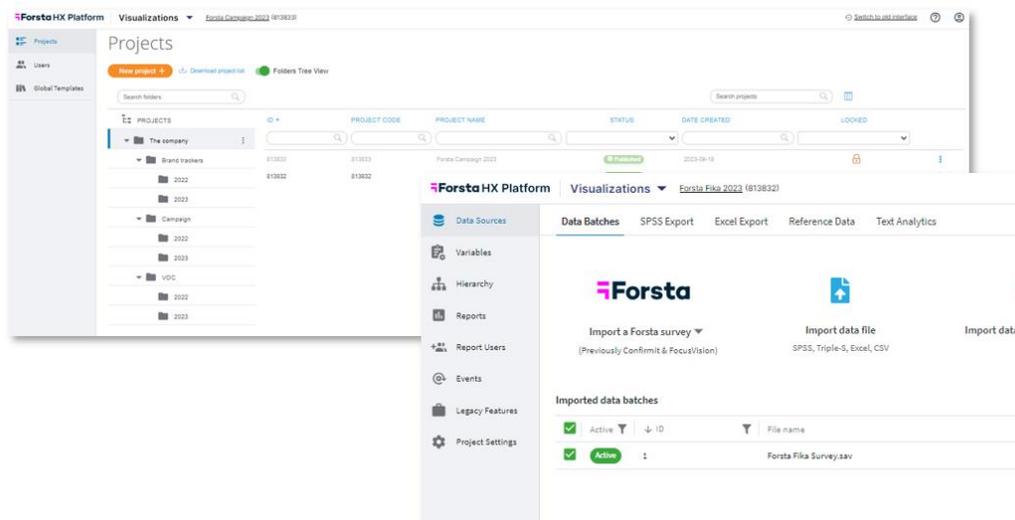
If you would like to know more about these features, please contact the support team at [visualizationsSupport@forsta.com](mailto:visualizationsSupport@forsta.com) and they will be able to assist you.

Best Regards,  
Forsta Team

## 2 Overview

### New project administration design and navigation

- The navigation in the "Administration" area has undergone a complete redesign, resulting in the reorganization of pages to streamline the process of product learning and project setup. Below, you'll find the new navigation, featuring a left-hand side menu that replaces the previous ribbon menu located at the top of the page.



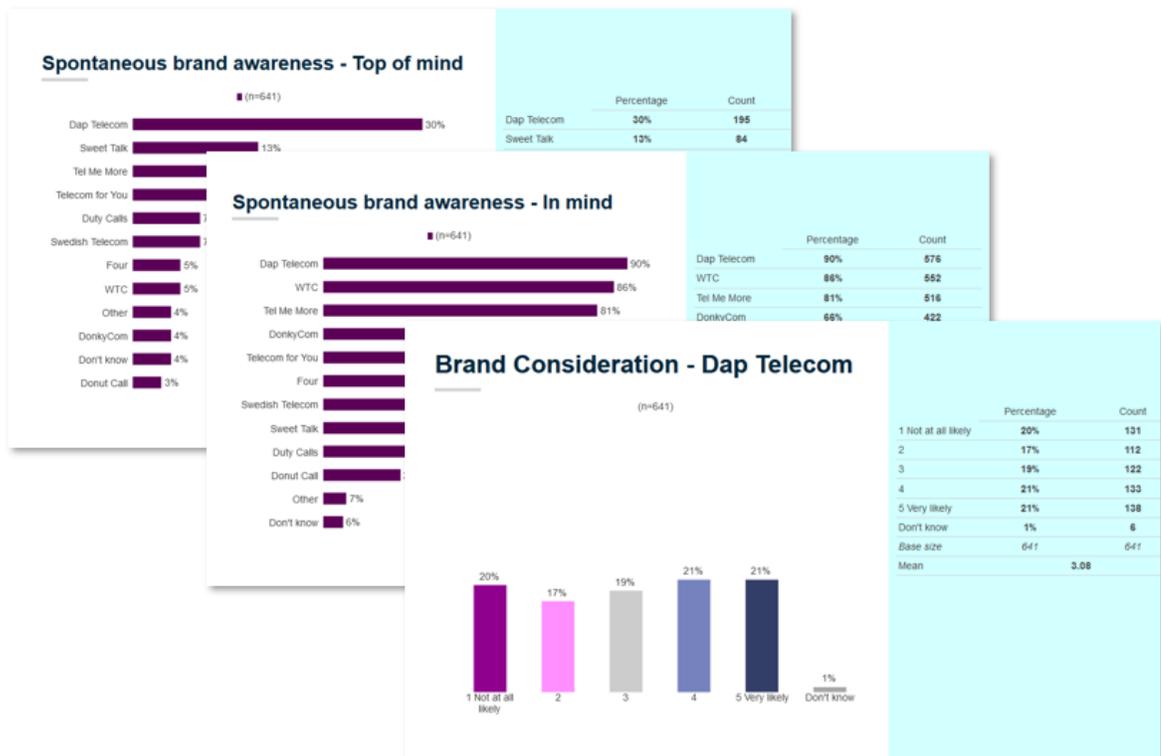
### Storyteller - Auto-generation of slides

- With just a few clicks you can now auto-generate comprehensive and professional looking topline-like reports in "PPT format" in the StoryTeller reporting module. These reports serve as a quick overview of results or as a foundation for more advanced reporting.



- The auto-generation process creates a slide for each of the variables you want to include. Intelligent logic is used to assign a slide template to each of the variables based on their question types (single, multi, scale, numeric, open ended), ensuring precise reporting.
- During the auto-generation process, you can utilize your own customized templates or start instantly with any of the available Forsta provided standard templates.

Here's an example of auto-generated slides.



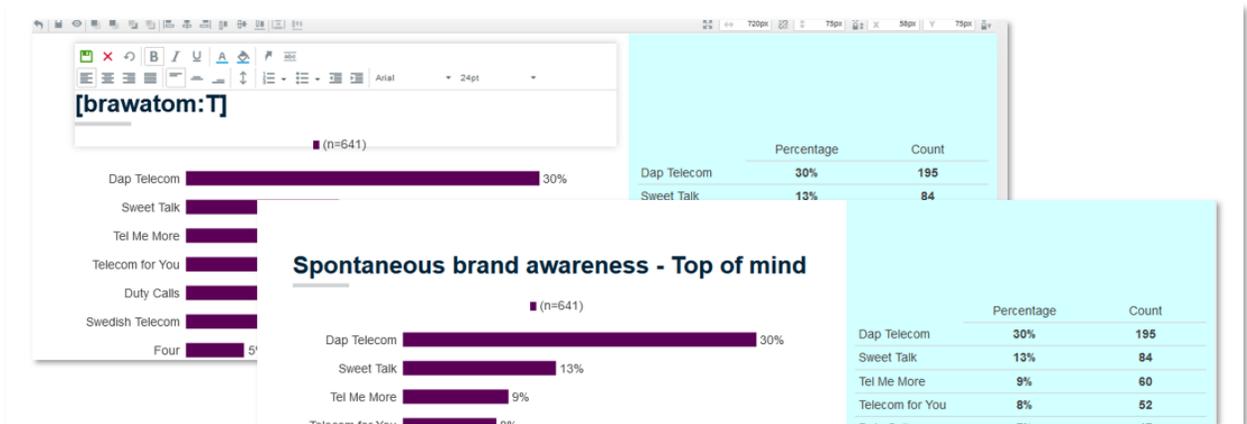
**Storyteller - General enhancements**

- StoryTeller reports can now be efficiently copied for streamlined setup, testing, or creating identical versions. The copied report becomes an exact clone of the original, carrying over all settings such as report content, sub-reports, Optional

report filters, report layout settings such as export formats and PPT templates and user access rights.

- Text boxes, you can now insert a question text token within the text box to automatically populate the question text. Since the token always references the question text, there is no need to update the text box when the question text is modified which significantly reduces setup time in, for example multilingual projects and template-based workflows.

Example of token, based on question code, and result.



- The Storyteller chart can now be animated in Report user view, allowing for more visually appealing dashboards. The charts come to life with animations during the initial load and when applying filters. By default, chart animation is not enabled, but you can easily enable it for your projects.
- Optional filters, you can now set a maximum number of items that the users are allowed to select in an Optional filter, even when the 'No selection' option is available. Previously, the maximum selection limits were only applicable to multi-select filters that did not include a "No selection" item.



- When exporting Respondent tables to Excel date variables are now formatted as native Excel dates, and answer IDs of categorical variables are exported as numbers. These updates make it easier to work with the data in Excel, allowing for convenient date and number filtering without the need to adjust the formats.
- The “Template” option previously located on the first (Start) tab in the ribbon menu, used to insert template slides/objects from the library, has now been relocated to a dedicated “Template” tab. Within this tab, you will also discover options for saving slides, objects, etc. as templates, which were previously only accessible through the right-click context menu.

### **StoryCreator**

- In StoryCreator reports featuring deck filters, you now have the capability to exclude charts and tables from deck filtering. This means that the excluded objects remain unaffected by any applied deck filters. This enhancement simplifies the creation of designs where user-filtered data (via deck filters) can be compared to predefined static data, such as totals.

### **Crosstabulation tool**

- Previously, when opening a saved Workbook, the default display was the result tab. Now, instead of automatically loading the result table, the default tab that opens is Rows & Columns. This change is designed to reduce loading times, especially for Workbooks with numerous sheets.



- You can now display the standard deviation for both scale and numeric questions, offering valuable insights into the level of variability or agreement among respondents.
- Value sorting can be applied to tables in the Crosstab tool by clicking on column/row headers. Previously, there was no option to revert to the default sort order. Now, you can easily return to the default sort order.

### **Data connectivity**

- When configuring a scheduled, ongoing data import, you now have the option to specify an expiration date for the job. This enhanced feature gives greater control over your imports and the data utilized in reports, allowing you to proactively halt imports at a specific date.
- Forsta HX Platform Surveys integration;
  - New support for importing the whole sample has been added which allows you to follow-up on fieldwork status such as number of emails sent, percentage share of completes, number of respondents that did not start the survey etc.
  - In Forsta HX Platform Surveys variables can have properties such as SystemVariable, Background, Hidden, among others. These properties are now automatically assigned as question tags during the data import into Visualizations. You can utilize these tags on the Questions page to help search for specific types of which simplify tasks like deactivating all System variables from reporting.



- External data, unrelated to response data, such as media investments, sales data, web traffic, etc., stored in Hub, can now be imported into Visualization projects.
- The export functionality for SPSS files (.sav) has been enhanced to include input variables which were not supported previously. Furthermore, for faster exports and lighter file sizes, a new option is available to exclude all open-ended variables from the export. Including open-ended variables significantly increases file size and export time.

### **Folder management**

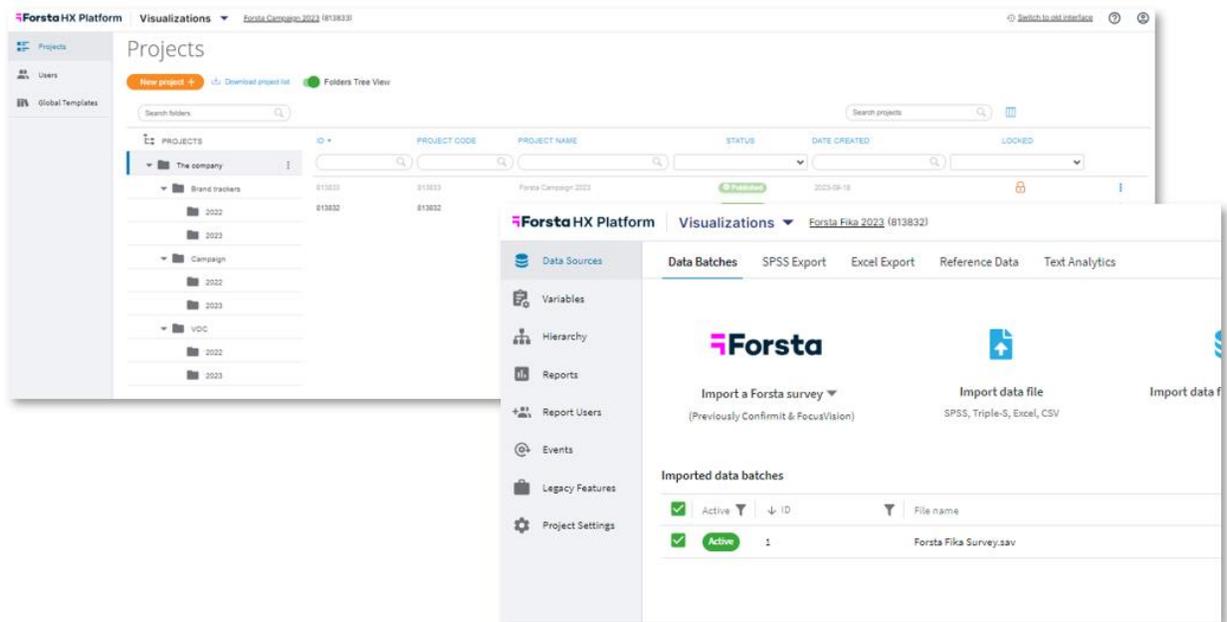
- The three-level folder structure utilized to organize projects can now be visualized in a tree structure, offering a more convenient way to have an overview of all your folders and projects. Additionally, you now have the option to add new folders and rename folders directly from this interface. This improvement simplifies the organization of your projects compared to the previous method, which required contacting the support team for such tasks.

## 3 New administration navigation

### 3.1 Overview

The navigation in the "Administration" area has undergone a complete redesign, resulting in the reorganization of pages to streamline the process of product learning and project setup.

*Below, you'll find the new navigation, featuring a left-hand side menu that replaces the previous ribbon menu located at the top of the page.*



**Please Note:** If you can't locate a specific function in the new interface, you have the option to revert to the previous interface. Once you've found the desired function on the old interface, you can return to the new interface to identify its location there.

*To access the old interface, click the 'Switch to Old Interface' button located in the top right corner. It will remain available for a few months.*



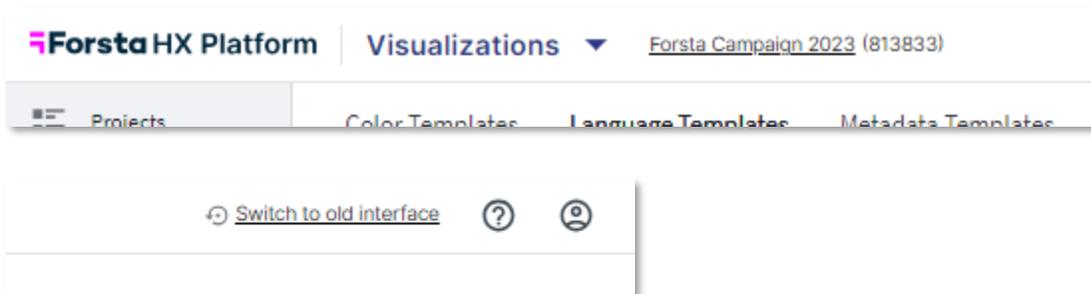
The next chapters provide guidance on how to utilize and locate items within the new navigation system.

### 3.2 Global navigation header

In the global header at the top of the page, you can easily navigate as follows:

- The "Forsta HX Platform" logo serves as a button to return to the "Report User Project Selection" page.
- "Visualizations" will take you back to the "Administration Project Selection" page.
- The project name provides a direct link back to your current project.
- The question mark icon leads to the Knowledge Base and Release Notes.
- The logout option is located under the profile icon.

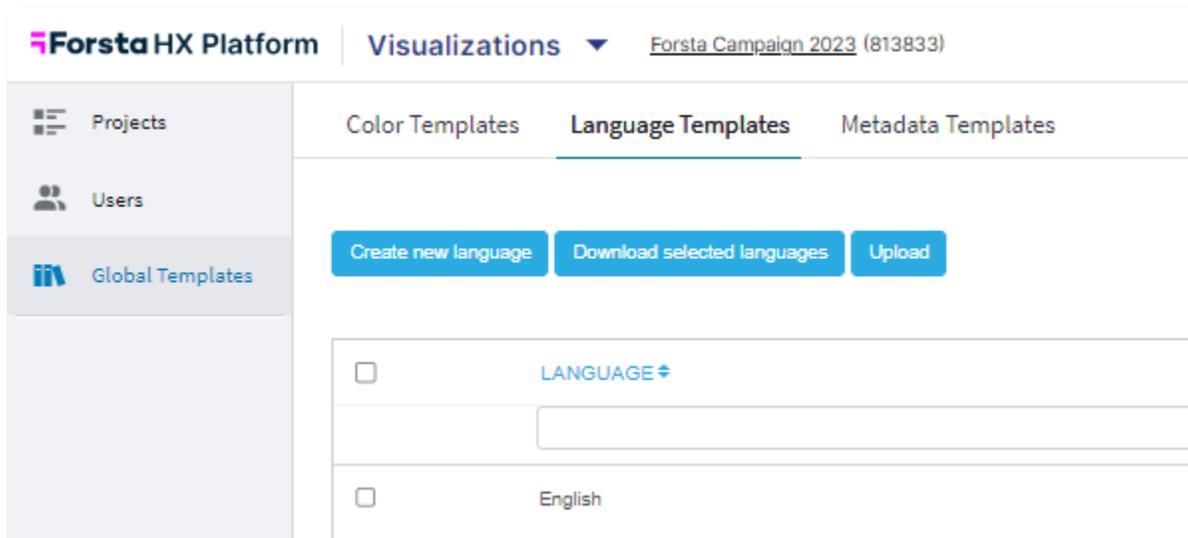
*The global header.*



### 3.3 Project administration landing page

In the project administration landing page, you'll find three tabs:

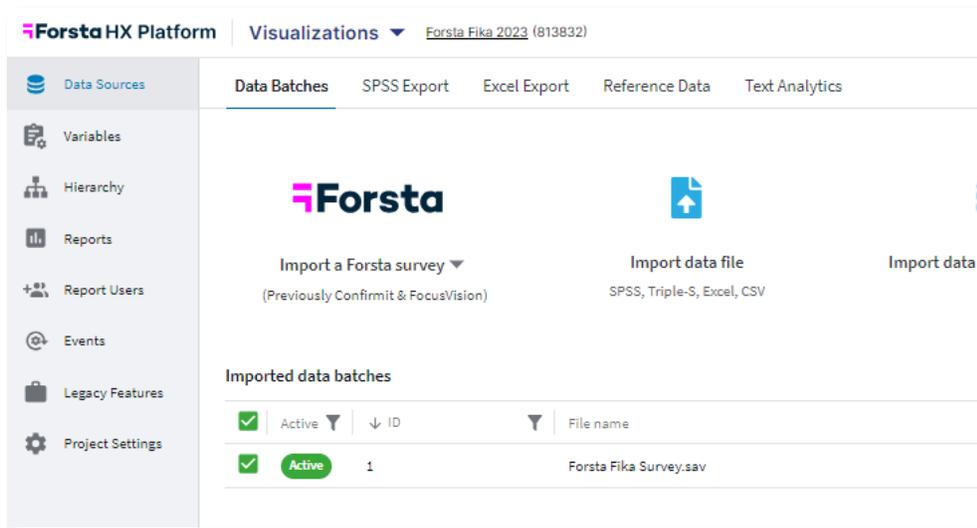
- **Projects:** This tab displays your list of projects.
- **Users:** Here, you can access the "Report User Administration" page.
- **Global Templates:** This tab contains various assets that can be shared across projects, including Color Templates, Language Templates, and Metadata Templates.



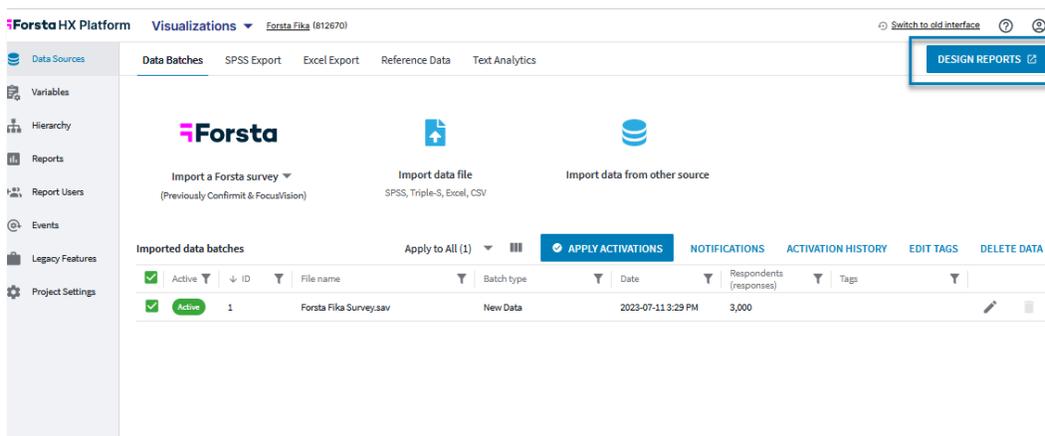
### 3.4 Navigating within the project

After entering a project, you will find various tabs positioned on the left side. Each tab contains subpages displayed beneath the global header.

*Example of the Data sources tab and the subpages.*



To access the report design functionality, you will now find the button labeled "Design Reports" in the upper-right corner under the global navigation.





***Please Note: When working on report design, a new browser tab will open, replacing the previous behavior of opening a new window.***

## Data Sources

In this section, you will find all data-related pages and functionalities, which include:

- **Data Batches:** This section is for managing imports and activating data batches.
- **Export of Data:** Here, you can utilize tools to export raw data to formats like SPSS, CSV, and Excel.
- **Reference Data:** This section is dedicated to managing reference data used for external benchmarking purposes.
- **Text Analytics:** From here, you can set up flows to send data to any of the integrated text analytics tools.

## Variables

Within the "Variables" section, you can explore functionalities related to imported data, including:

- **Question-Related Features:** Access features associated with questions in your data, such as editing labels, colors, question types, and more.
- **Cleaning and Recoding:** Perform data cleaning and recoding tasks.
- **Variable Subsets:** Manage subsets of variables within your dataset.
- **Filter vs. Weights:** Utilize filtering and weighting options for data analysis.
- **Download Metadata:** Access the option to download metadata for your data.

## Hierarchy

In this section you set up and derive hierarchical filters.

***Note 1: Enabling and disabling the Hierarchy function has been streamlined. Instead of going through Project settings, you now directly manage it on the Hierarchy page, simplifying the process of enabling the hierarchy filter. The***



*page's design has been updated for a refreshed look, but the functionality remains unchanged.*

***Note 2 If you're utilizing the option to import hierarchy data from Forsta Plus, there's no need to manually enable any settings in the hierarchy page. The specific setting for Forsta Plus-created hierarchy is automatically activated when you initiate the hierarchy import within your data import process.***

## **Reports**

In this section, you can effectively manage the report tabs within the portal. You can add reports such as StoryTeller, Crosstab tools, and Document archives. Additionally, you have the option to decide whether these reports should be published or not.

## **Report Users**

In the "Report User" section, you can effectively manage your report users by adding or removing them, adjusting their access levels, sending out invitation emails, and accessing basic user statistics.

## **Events**

If your project incorporates events, whether they are Respondent-based or Result-based events, you can access and manage them from this section.

## **Legacy Features**

The functionalities located in this section are in Legacy mode within Forsta Visualizations. This indicates that there are no ongoing developments or updates for these features, and we are actively working on replacing them with newer functionalities. Currently, you can find "Dynamic Image Module" and "Setup Tab Content (Legacy)" here, which are used for Legacy report Open Answers.

## **Project Settings**

Within the Project setting, you can make various adjustments, including changing the project name, defining default settings like the decimal separator and default font type, adding languages, and more.

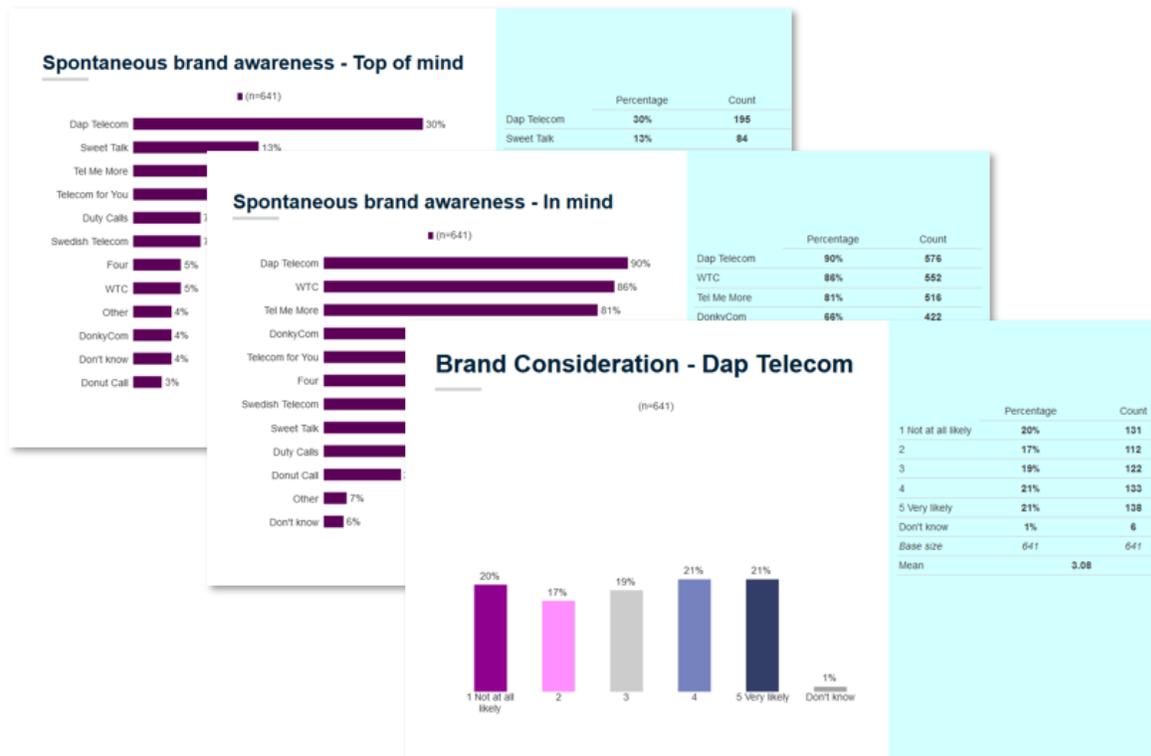
# 4 StoryTeller: Auto-generated Topline reports

## 4.1 Overview

With just a few clicks you can now auto-generate comprehensive and professional looking topline-like reports in “PPT format” in the StoryTeller reporting module. These reports serve as a quick overview of results or as a foundation for more advanced reporting.

The auto-generation process creates a slide for each of the variables you want to include. Intelligent logic is used to assign a slide template to each of the variables based on their question types (single, multi, scale, numeric, open ended), ensuring precise reporting.

*Here is an example of auto-generated slides. In this example, you can see that the scale variable is visualized in columns, while the single and multi-choice variables are displayed in bars, sorted by values.*





These auto-generated slides become “regular” StoryTeller slides so they can be further customized using standard StoryTeller features. Additionally, you can apply optional filters (including filter comparison choices) to analyze results further for various segments etc.

During the auto-generation process, you can utilize your own customized templates or start instantly with any of the available Forsta provided standard templates.



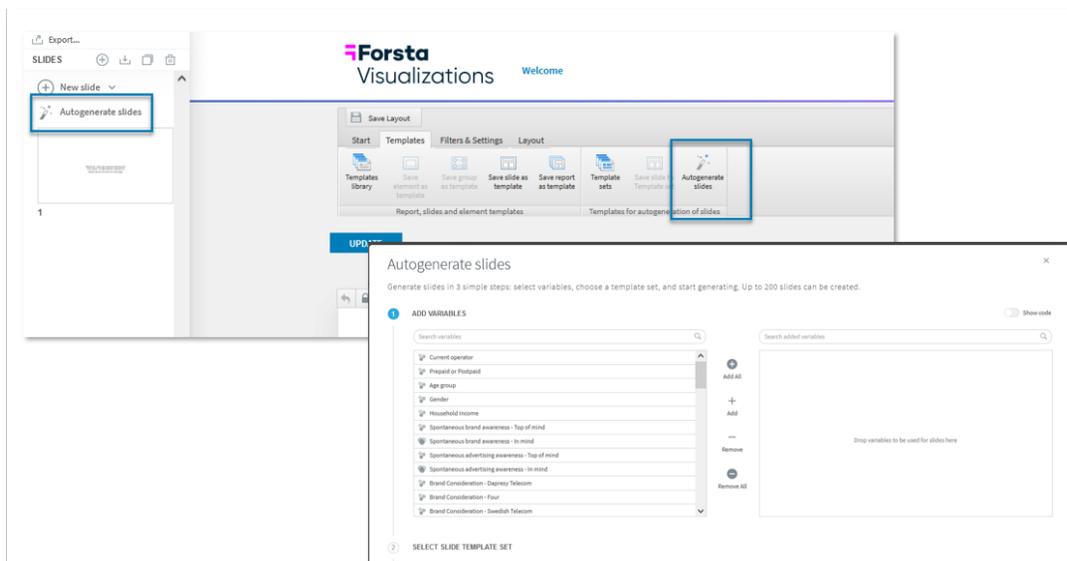
## 4.2 Create an autogenerated report

**Note: This chapter describes the process of auto-generating slides and chapter 4.3 describes the procedure for creating your own customized slide template sets. Creating your own template sets is optional, as Forsta offers standardized template sets that can be used during the creation process.**

To auto-generate slides, access the Autogenerate panel from either the slide panel or the Template tab as demonstrated in the image further down. In this panel you generate the slides with three simple steps (you can find more detailed information for each step further down):

- Step 1: Select the variables you want to include in the report. A slide will be generated for each variable chosen.
- Step 2: Pick a template set. These template sets determine the design of the slides.
- Step 3: Start generating slides

*From here you start the auto-generate slides process.*

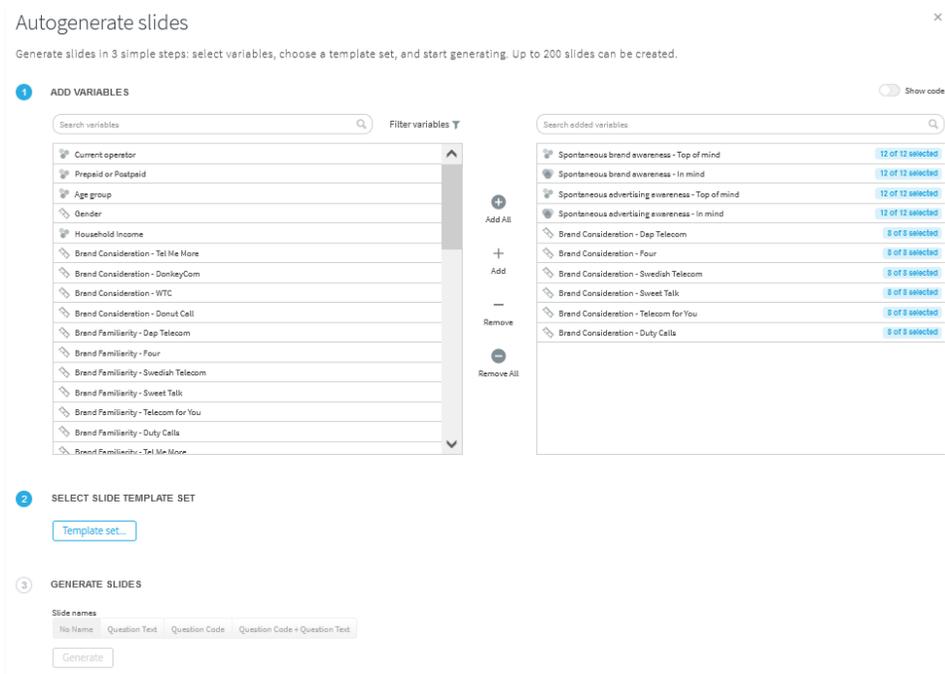




### Step 1: Select variables

Add the variables to be included in the report by adding them into the right variable list. In the example below ten variables have been selected which will result in ten slides in the end.

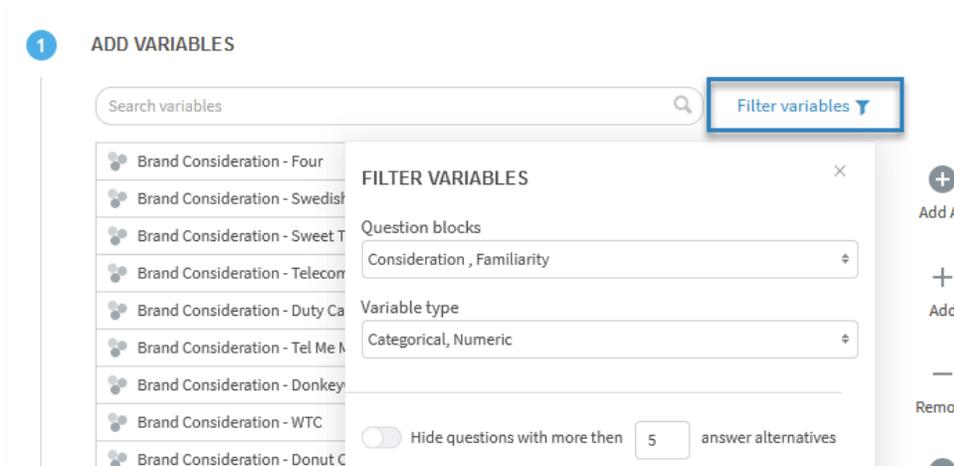
*Drop the variables to be included in the report into the variable list to the right.*



**Note, the sequence of auto-generated slides corresponds to the order of variables in the right list. Use drag-and-drop to rearrange the order to preferred sorting sequence. Additionally, you have the option to select which answers should be incorporated into the report by selecting the blue badge displaying the number of answers.**

If Question blocks are present within the project, the left variable list can be filtered accordingly. You can also apply variable type filtering, for example, to hide all the open-ended variables from the list. This streamlines the process of selecting variables in projects involving numerous variables.

Click "Filter Variables" to open the panel for Question block filtering, variable type filtering, and more



## Step 2: Select template set to specify design

Choose a preferred template set. A template set determines the design of the report and contains five slide templates, one for each specific variable type (single, multi, scale, numeric and open ended). You have the option to either apply one of your customized slide template sets (see chapter 4.3 for how to create those) or use any of the Forsta standard template sets.

Here we see the view for selecting a Template set, you can click on the thumbnail to enlarge the slide images to get a clearer understanding of the content.



### Step 3: Generate slides

As the last step, proceed to generate all slides. By default, the slides will be created without specific names. You can utilize the “slide name” toggles to automatically assign names to the slides based on code or question text of the variables displayed in the current slide. Having code or question text in slide names makes it more convenient to locate a specific question's slide within the slide panel, streamlining your navigation.

The duration of the generation process will differ based on factors such as the quantity of slides being generated, the volume of data etc.

Once the slides have been generated, it is essential to save the StoryTeller report setup as always, if not the created slides will be lost when navigating to another report or logging out.

*Click Generate to start the creation of all the slides.*



### Autogenerate slides

Generate slides in 3 simple steps: select variables, choose a template set, and start generating. Up to 200 slides can be created.

**1 ADD VARIABLES** Show code

Search variables  Filter variables

- Gender
- Household Income
- Brand Consideration - Tel Me More
- Brand Consideration - DonkeyCom
- Brand Consideration - WTC
- Brand Consideration - Donut Call
- Brand Familiarity - Dep Telecom
- Brand Familiarity - Four
- Brand Familiarity - Swedish Telecom
- Brand Familiarity - Sweet Talk
- Brand Familiarity - Telecom for You
- Brand Familiarity - Duty Calls
- Brand Familiarity - Tel Me More
- Brand Familiarity - DonkeyCom
- Brand Familiarity - WTC
- Brand Familiarity - Donut Call

Search added variables

- Spontaneous brand awareness - Top of mind (12 of 12 selected)
- Spontaneous brand awareness - In mind (12 of 12 selected)
- Spontaneous advertising awareness - Top of mind (12 of 12 selected)
- Spontaneous advertising awareness - In mind (12 of 12 selected)
- Brand Consideration - Dep Telecom (8 of 8 selected)
- Brand Consideration - Four (8 of 8 selected)
- Brand Consideration - Swedish Telecom (8 of 8 selected)
- Brand Consideration - Sweet Talk (8 of 8 selected)
- Brand Consideration - Telecom for You (8 of 8 selected)
- Brand Consideration - Duty Calls (8 of 8 selected)

**2 SELECT SLIDE TEMPLATE SET**

Change Template set...

Bar chart + Table (Design 1)

- Single choice (2 variables/slides)
- Multi choice (2 variables/slides)
- Scale (6 variables/slides)
- Numeric (0 variables/slides)
- Open ended (0 variables/slides)

**3 GENERATE SLIDES** 10 slides

Slide names

- No Name
- Question Text
- Question Code
- Question Code + Question Text

Generate

### 4.3 Save and manage template set

If you want to use your own distinctive design for the auto-generated slides you can make your own sets of slide templates. These sets of templates work in all your projects, like regular report templates do.

A template set has up to 5 slide templates, one for each type of variable (single choice, multiple choice, scale, numeric, and open-ended).

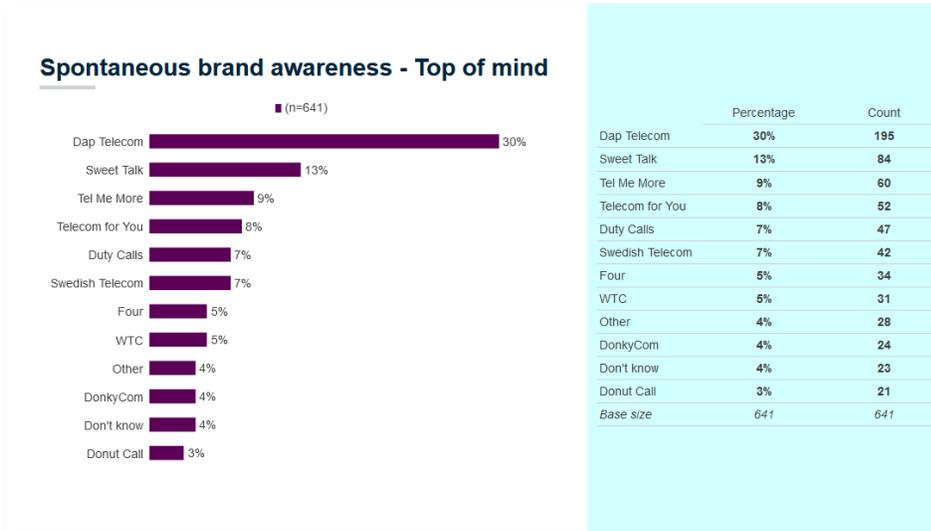
*Here we see an example of a template set, when this template set is used all variables will be assigned one of these slide templates based on their type.*



#### 4.3.1 Design slides in StoryTeller to be saved as template

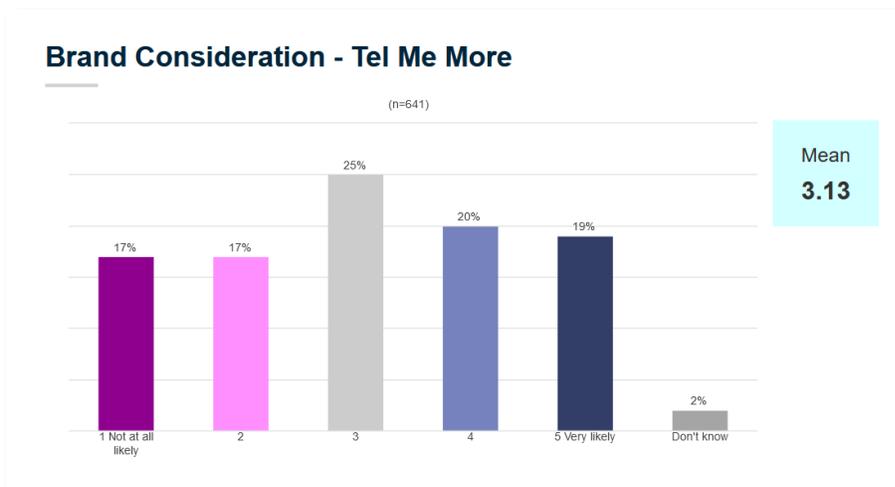
Before creating a template set, you need to set up the slides you want to include. The slides should be designed with one variable only, but multiple data objects can be used as long as one question is used.

*Example of slide with one variable and multiple data objects that can be used as template slide.*



The slides need to be designed for a specific type of variable (single choice, multiple choice, scale, numeric, or open-ended). A slide that shows different types of calculations like a percentage and a numeric sum cannot be saved as a template.

*Example: this slide displays % and categorical mean → the slide can be saved as a scale template slide but not as a single, multi, numeric or open-ended template.*

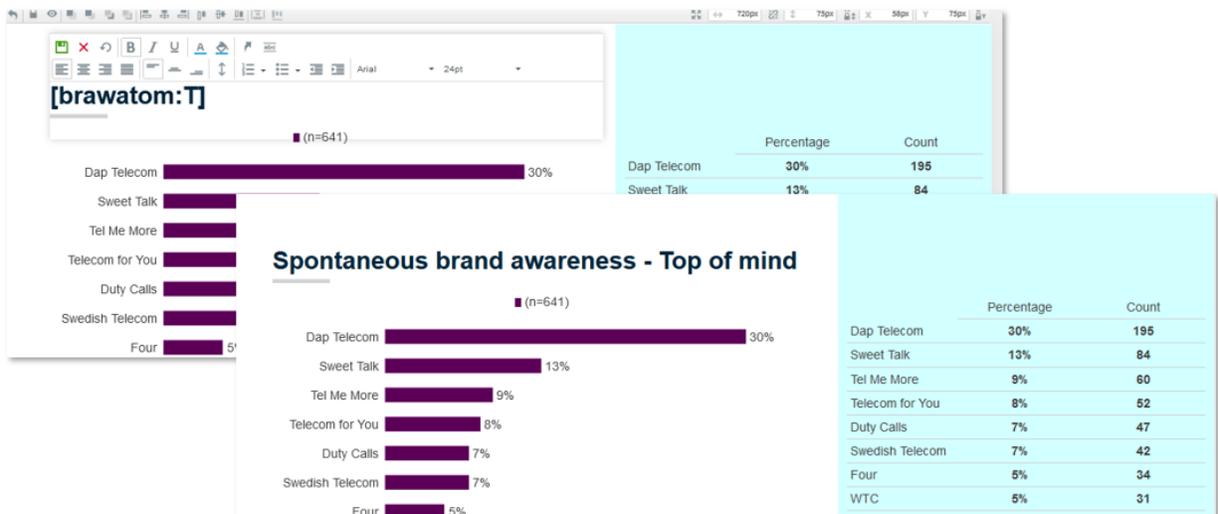




Additionally, since the template slides should be universal and not tied to a specific project, the data objects in the slides should not include filters or referencing other data objects in features such as "Sort by other chart," or links to other reports.

Based on the information above, slides that include charts like scatter and bubble cannot be saved as templates as these use more than one variable. Additionally, slides with dynamic images also cannot be saved as templates because they must have multiple variables selected or comparison filters or involve specific answer comparisons.

**Tip: Utilize the new question text tokens, explained in chapter 5.3, to automatically incorporate the question text into a text box, which serves as the slide header. If a text box contains the new question text token, as demonstrated in the example below, the code within the token will be replaced with the variable code corresponding to the variable inserted in the slide during the auto-generation process.**





### 4.3.2 Create Template sets

Once you have made the slides you wish to save as templates, use the following steps to create the Template set. You can find more detailed information for each step further down:

- Step 1: Go to the ribbon menu, and under the Template tab, click on "Save slide to template set".
- Step 2: Create a new template set or choose an existing one
- Step 3: Select the variable type for which the slide should be saved as a template
- Step 4: Save and repeat this process for all slides you want to include in the template set.

#### Step 1:

Go to the slide you want to save, and in the Template tab, click "Save slide to template set".

The screenshot shows the software interface with the 'Save slide to template set' button highlighted in the ribbon menu. Below the ribbon, there is a slide titled 'Header' with a bar chart and a data table.

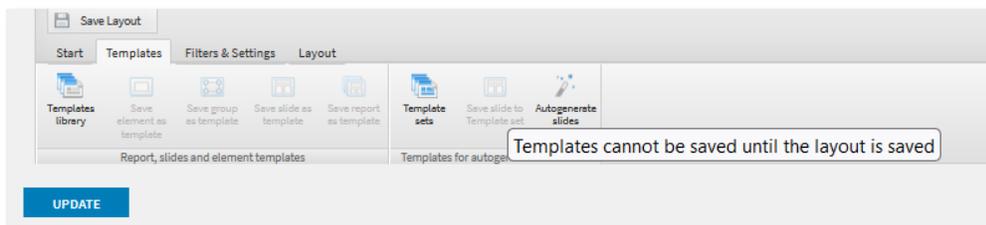
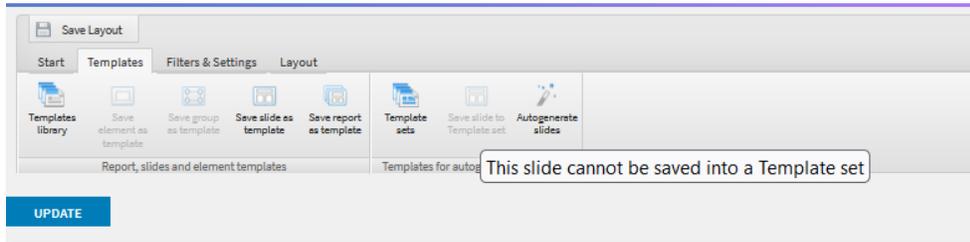
**Header**

■ Spontaneous brand awareness - Top of mind (n=641)

	Percentage	Count
Dap Telecom	30%	195
Sweet Talk	13%	84
Tel Me More	9%	60
Telecom for You	8%	52
Duty Calls	7%	47
Swedish Telecom	7%	42
Four	5%	34

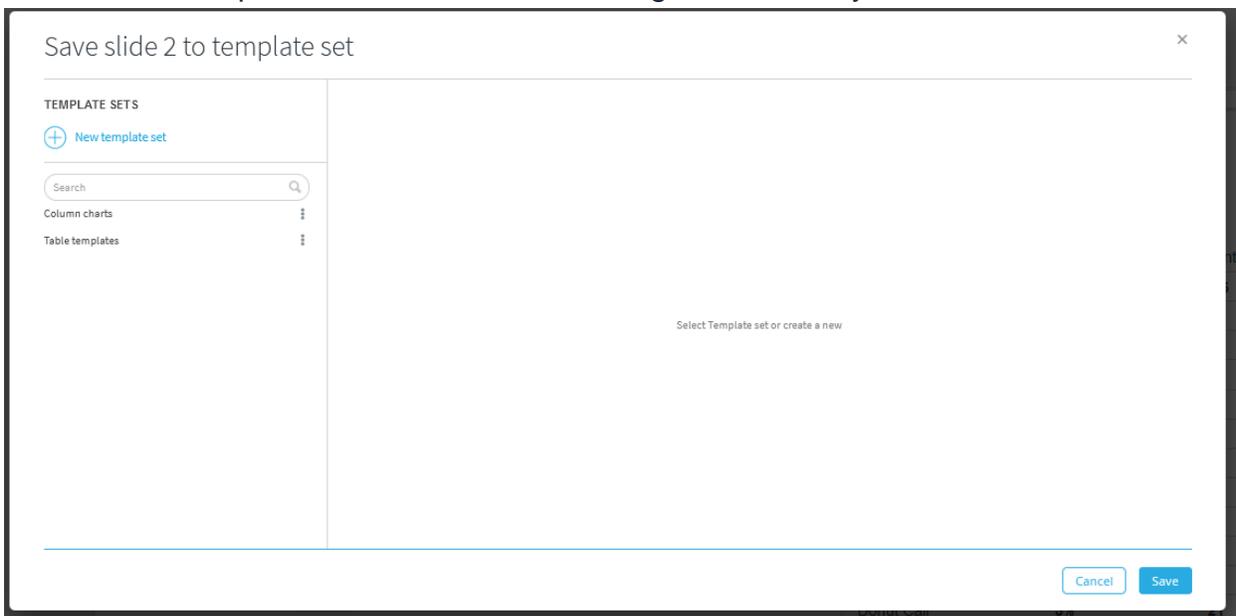


**Note, if you cannot click on "Save slide to template set," it is because of either unsaved changes (like needing to save the StoryTeller layout) or because the slide does not meet the criteria explained in section 4.3.1.**



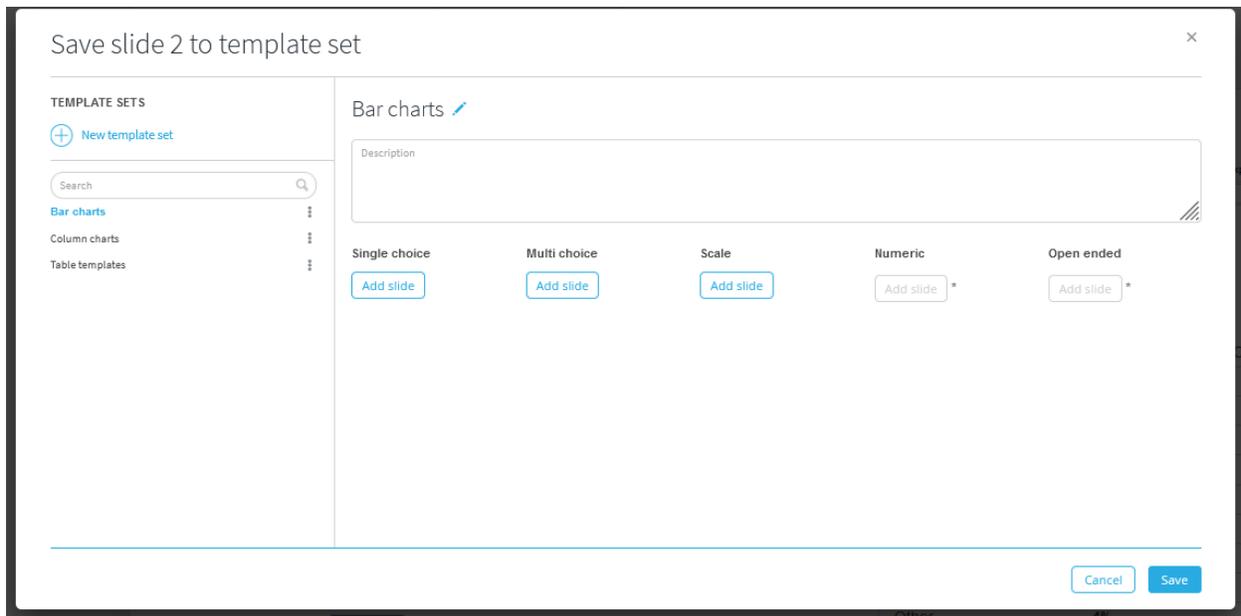
**Step 2:**

Make a new template set or choose an existing one to modify.



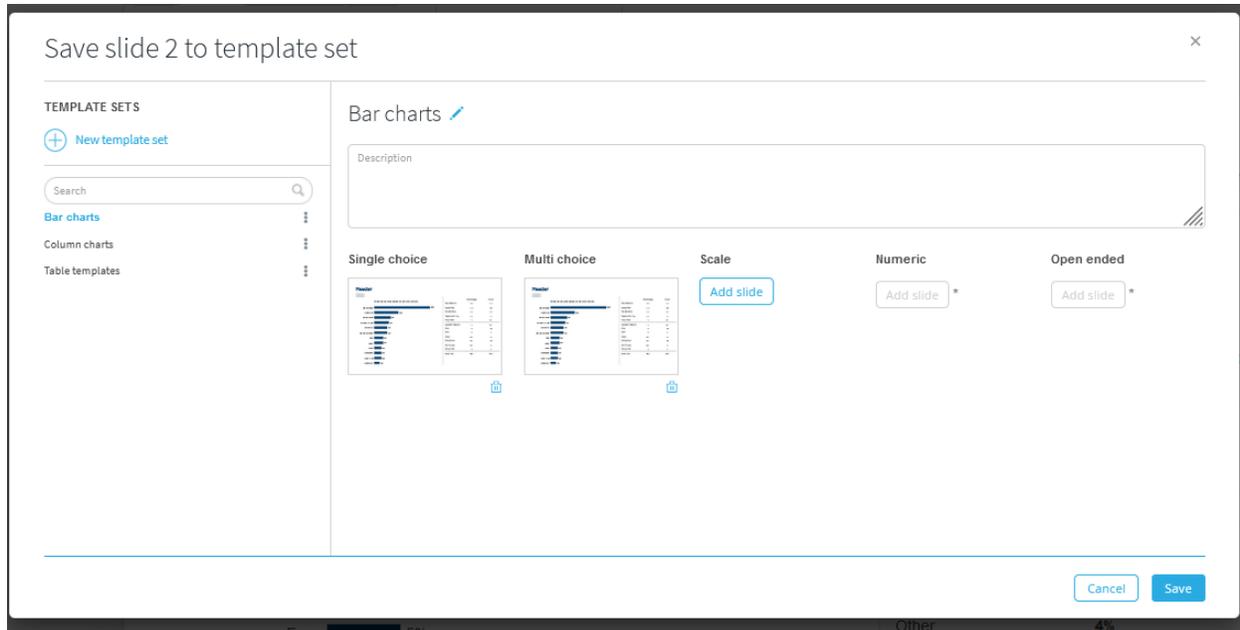
**Step 3:**

Choose the variable type for the slides you want to save. Only the relevant options will be enabled. As shown below, the slide in this example can be saved for single choice, multi choice, and scale but not for Numeric and Open end.



**Step 4:**

Once you have chosen the variable types click the Save button. The slide in the example below is now saved as both a single choice and a multi choice template.



Now, follow the same process for all the slides you want to include in the template set.

**Note 1, you do not have to create slide templates for every variable type in a Template set. For instance, you can choose to include slide templates only for single choice, multi choice and scale, if you do not intend to auto-generate slides for numeric and open-ended variables.**

**Note 2, when slides are saved into Template Sets that are based on a StoryTeller report using the PowerPoint Master Template, the name of the applied master template slide will be saved as part of the slide template for automatic generation. During the auto-generation process, the slides will utilize the corresponding master template slides, based on the slide name, if it exists in the current project. If it does not exist, the default slide will be used.**

**Here we see the second step in the auto-generation process. The text beneath the thumbnails indicates the name of the master template slide.**



### Topline templates 2

Single choice	Multi choice	Scale	Nur
<p>5_Title, image and table</p>	<p>5_Title, image and table</p>	<p>3_Title, image and table</p>	

#### 4.3.3 Browse your Template sets

If you want to view all the template sets you have created, rename them, or delete them you can go to the Template set collection by clicking on "Template sets" in the ribbon menu, as demonstrated below.

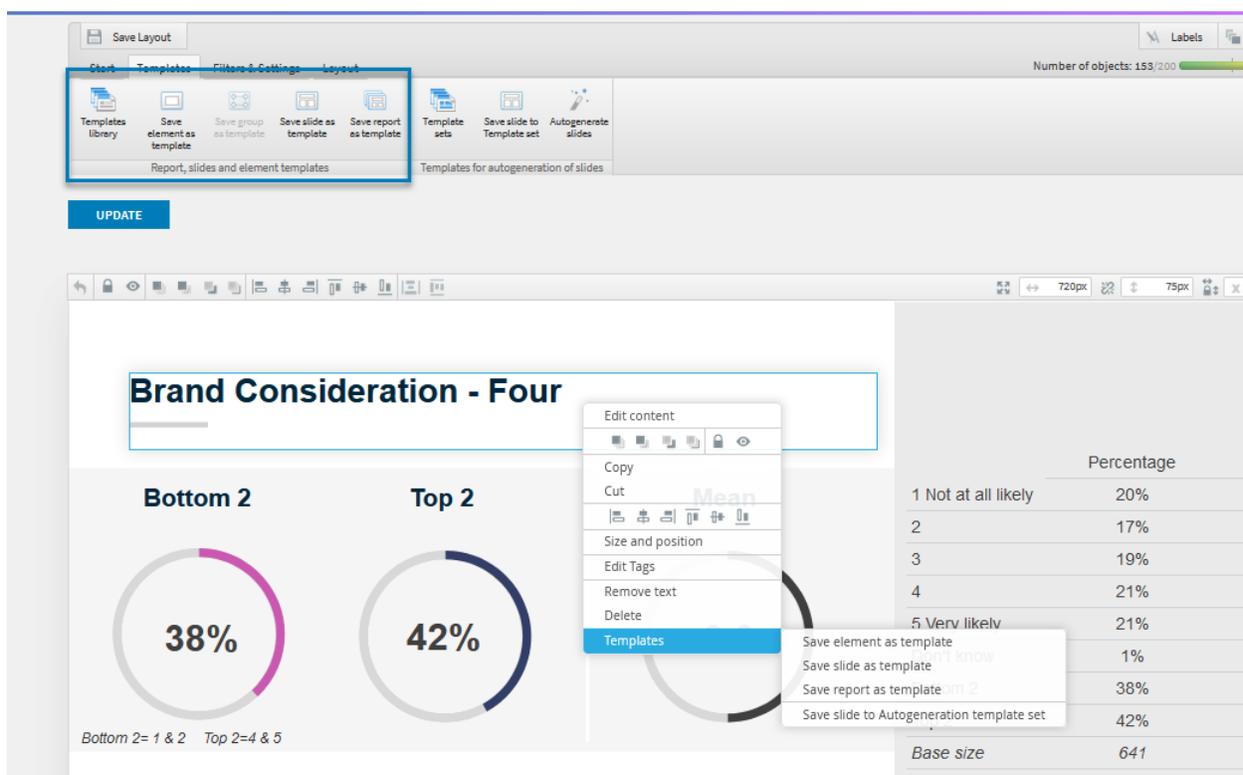
## 5 StoryTeller: general enhancements

### 5.1 Ribbon menu updates, Templates

The “Template” option previously located on the first (Start) tab, used to insert template slides/objects from the library, has now been relocated to a dedicated “Template” tab. Within this tab, you will also discover options for saving slides, objects, etc. as templates, which were previously only accessible through the right-click context menu.

Furthermore, in the new “Template” tab, you can manage templates for the slide auto-generation process, as described in Chapter 4.1.

*Here we see the new Template tab.*



## 5.2 Copy StoryTeller report

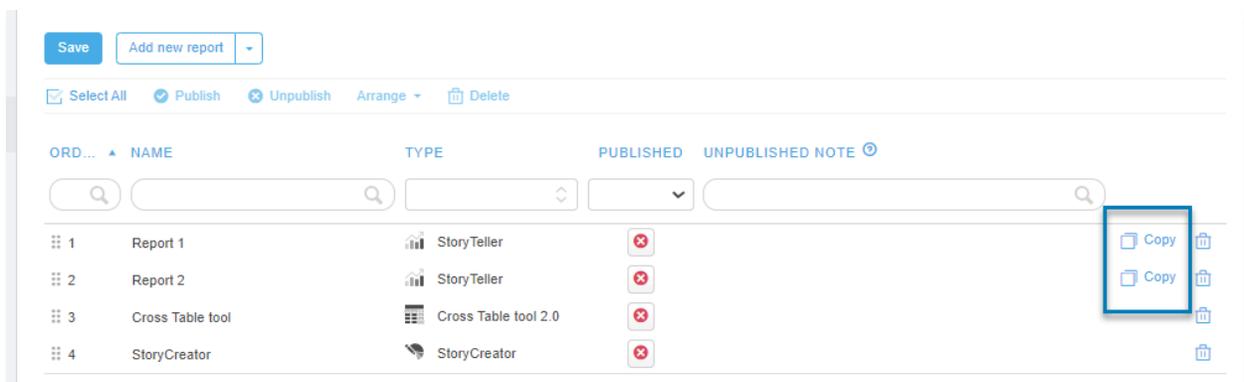
StoryTeller reports can now be efficiently copied for streamlined setup, testing, or creating identical versions. The copied report becomes an exact clone of the original, carrying over all settings and items. Below, we outline what is included in the copied report:

- Sub-reports
- Report Layout settings, such as export formats, default slide sizes, PPT templates, device filtering, etc.
- Optional filters, including hierarchy filter configurations
- All slides and their content\*
- User access rights (the copied report is unpublished by default)

\* If the copied slides contain links, such as those within text boxes, leading to other slides within the same StoryTeller report (including sub-reports), these links will be updated to target the newly copied report. Links pointing to other StoryTeller reports, Drilldown reports, or Forms will remain unchanged.

If there are any My Stories saved connected to the original report, these will not be copied.

*To copy a StoryTeller report, use the new Copy option on the Report setup page.*



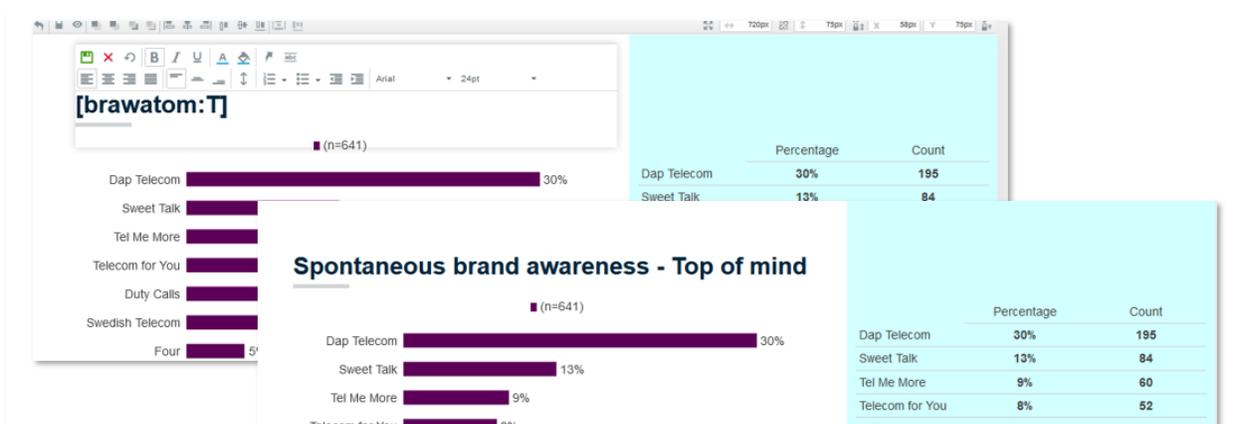
### 5.3 Question text tokens in Text boxes

In many use cases, question texts are incorporated into text boxes, such as slide headers, as demonstrated in the example below. To improve the setup process, you can now insert a question text token within the text box to automatically populate the text. Since the token always references the question text, there is no need to update slide headers or similar elements when the question text is modified.

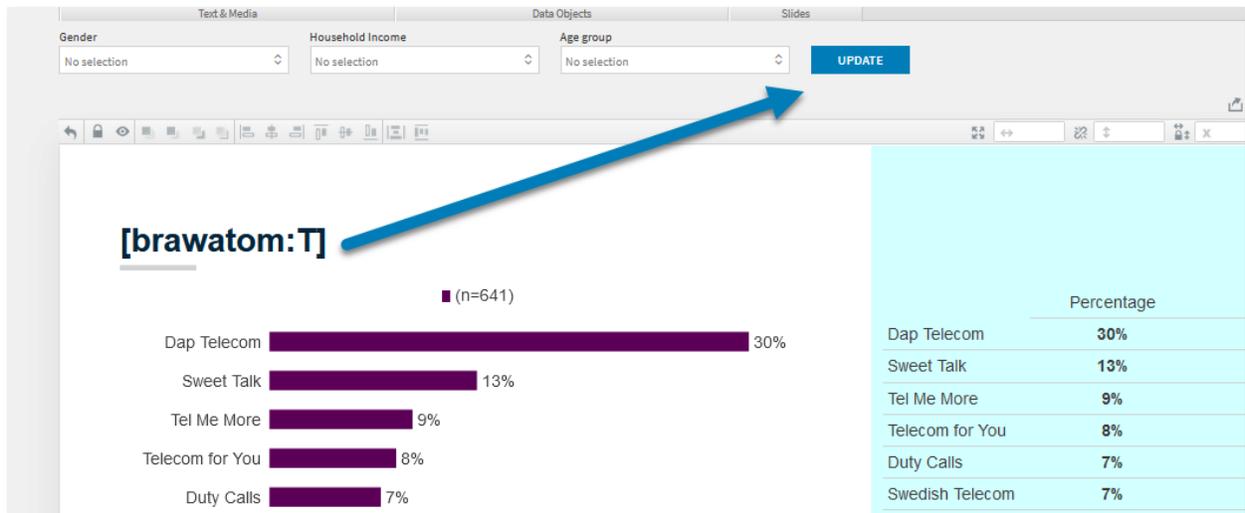
Utilizing these new tokens can significantly reduce setup time in multilingual projects, as text boxes no longer require translation into multiple languages. Moreover, in template-based workflows, the question text token can provide distinct advantages.

The question text token is entered as ["question code":T], so if the question code is "BrAwToM," the token should be [BrAwToM:T]. Please note that the "T" suffix is case sensitive."

*Example of token and result.*



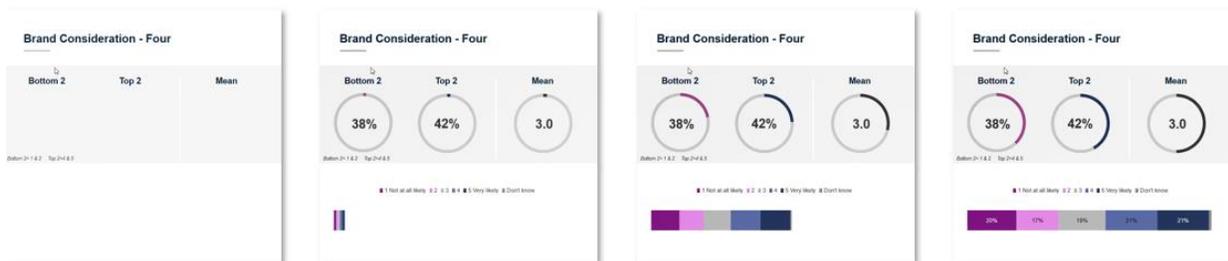
**Please note that the token is replaced with the question text upon slide update. So, if the text box displays the token during the setup process, simply click the 'Update' button, and the question text will be populated.**



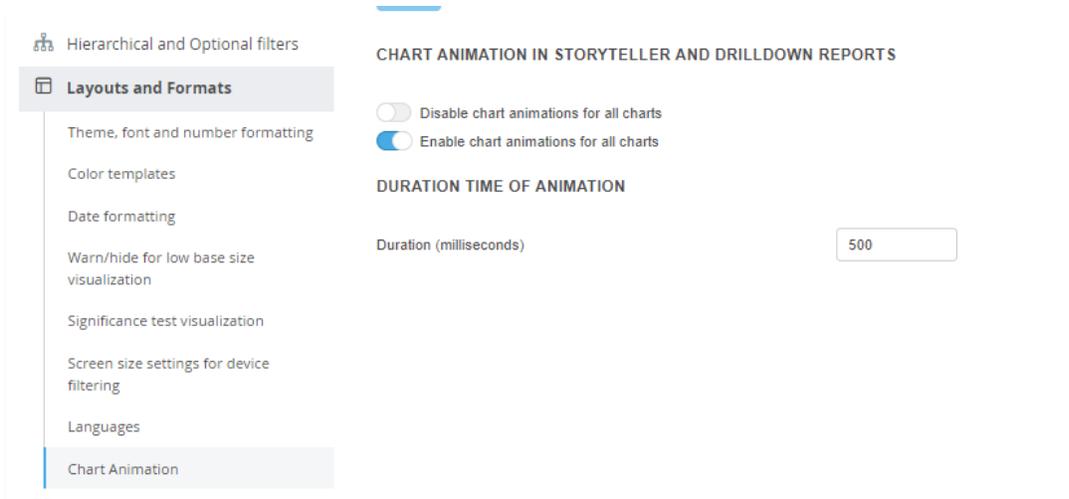
## 5.4 Animated charts

The Storyteller chart can now be animated in Report user view, allowing for more visually appealing dashboards. The charts come to life with animations during the initial load and when applying filters. By default, chart animation is not enabled, but you can easily enable it for your projects. The setting is available at the project level.

*An “example” of chart animation, the duration from the start to finish is set to 0.5 seconds by default.*



To enable chart animation, navigate to the Project settings page and access the new sub-page labeled “Chart animation”, located under “Layouts and Formats”, see image below





## 5.5 Enhanced Optional Filter control: Max selections

You can now set a maximum number of items that users are allowed to select in an Optional filter, even when the 'No selection' option is available. Previously, the maximum selection limits were only applicable to multi-select filters that did not include a “No selection” item.

*Here's an example setup where users can select a maximum of four countries, while also having the option to choose “No selection” if they prefer.*

Optional Filters

Filters Variable subset Time periods Moving average Interval

Filters  Split Filters  Nest Compare series

Active	Filter name	Add no selection	Use as multiselect	Minimum selections	Maximum selections	Behaviour	Default behaviour	Default option
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>					
<input checked="" type="checkbox"/>	Country	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		4	Filter	Filter	Select options
<input checked="" type="checkbox"/>	Gender	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Filter & Comp	Filter	Select options
<input checked="" type="checkbox"/>	Household Income	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Filter & Comp	Filter	Select options
<input checked="" type="checkbox"/>	Age group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Filter & Comp	Filter	Select options



## 5.6 Respondent tables, enhanced Excel export

When exporting Respondent tables to Excel date variables are now formatted as native Excel dates, and answer IDs of categorical variables are exported as numbers. These updates make it easier to work with the data in Excel, allowing for convenient date and number filtering without the need to adjust the formats.

Additionally, columns used to display Form links, which can only be used online, are now excluded from the exported version of the Respondent table.

*Below is an example export from the Respondent table. The dates are exported in their proper date format, and the answer IDs are exported as numerical values.*

	A	B	C	D	E
1	Respondent ID	Response Date	Gender	Index 1	Index 2
2	100002	2020-01-01	Woman	52	82
3	100004	2020-01-01	Man	87	47
4	100005	2020-01-01	Woman	54	45
5	100006	2020-01-02	Woman	47	23
6	100007	2020-01-02	Man	67	29
7	100009	2020-01-02	Man	29	35
8	100010	2020-01-02	Woman	93	32
9	100011	2020-01-02	Woman	85	45
10	100012	2020-01-03	Man	91	47
11	100014	2020-01-03	Woman	93	43
12	100015	2020-01-03	Woman	82	46
13	100016	2020-01-04	Man	54	45
14	100018	2020-01-05	Man	52	82

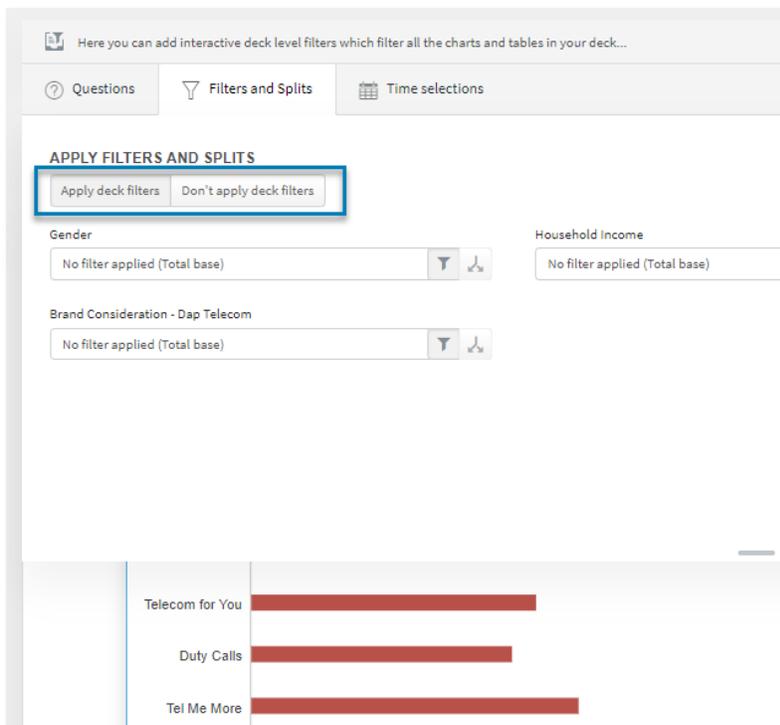


## 6 StoryCreator

### 6.1 Exclude deck filters

In StoryCreator reports featuring deck filters, you now have the capability to exclude charts and tables from deck filtering. This means that the excluded objects remain unaffected by any applied deck filters. This enhancement simplifies the creation of designs where user-filtered data (via deck filters) can be compared to predefined static data, such as totals.

*Below you see the new toggles in the “Filter and Splits” tab. These toggles are visible in charts/tables within StoryCreators, where Deck filters can be applied to the deck.*



# 7 Crosstabulation tool

## 7.1 Standard deviation

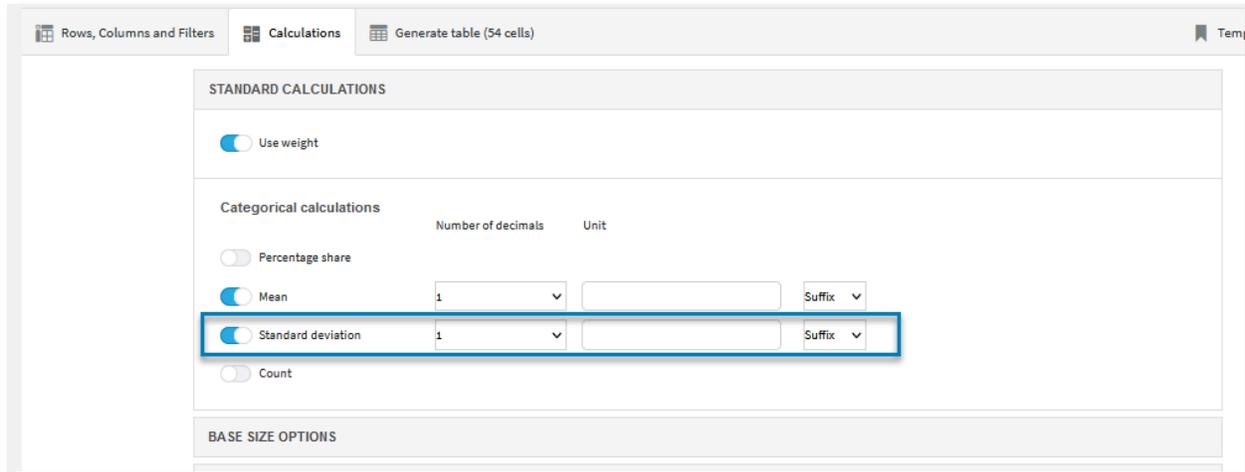
In the Crosstabulation tool, you can now display the standard deviation for both scale and numeric questions, offering valuable insights into the level of variability or agreement among respondents.

*Example.*

The screenshot shows the 'Calculations' tab in the Crosstabulation tool. The table displays data for 'Brand Consideration - Dap Telecom' across various household income brackets. The 'Standard deviation' row is highlighted with a blue border.

		Household Income					
		Less than 25 000 Euro	25 000-35 000 Euro	35 001 - 45 000 Euro	45 001- 55 000 Euro	55 001- 64 000 Euro	More than 65 000 Euro
		%	%	%	%	%	%
Brand Consideration - Dap Telecom	1 Not at all likely	22.5	23.8	12.6	19.1	16.7	27.9
	2	18.0	20.3	14.3	20.3	13.0	12.5
	3	16.7	15.3	26.8	19.0	28.2	8.4
	4	16.9	21.1	24.3	18.4	23.8	20.5
	5 Very likely	25.1	18.3	22.1	21.5	18.3	29.7
	Don't know	0.8	1.2	0.0	1.8	0.0	1.0
	Bottom 2	40.5	44.1	26.9	39.4	29.7	40.4
	Top 2	42.0	39.3	46.3	39.9	42.1	50.3
	Mean	3.1	2.9	3.3	3.1	3.1	3.1
	Standard deviation	1.53	1.49	1.31	1.48	1.33	1.66

The new "Standard Deviation" option is located among the calculation settings in the Calculation tab, as illustrated below:



Formulas for standard deviation:

*Unweighted calculation.*

$$s = \frac{\sqrt{\sum (x - \bar{x})^2}}{n - 1}$$

*x = the value of the respondent*

*$\bar{x}$  = mean value of sample*

*n = base size*

*Weighted calculation.*

$$s = \frac{\sqrt{\sum w(x - \bar{x})^2}}{n - 1}$$

*w = the weight of the respondent*

*x = the unweighted data of the respondent*

*$\bar{x}$  = the weighted mean value of the sample*

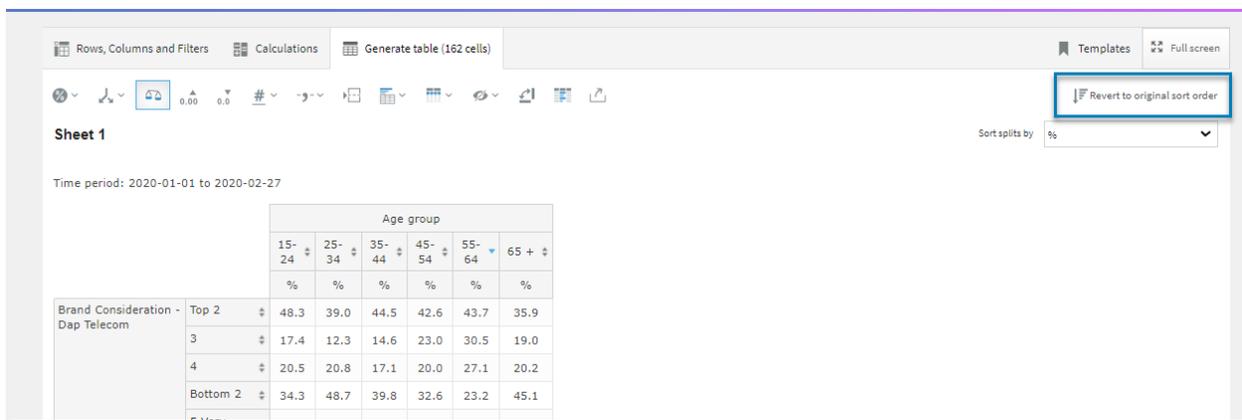
*n = the weighted base size*



## 7.2 Value based sorting, revert back to original order

Value sorting can be applied to tables in the Crosstab tool by clicking on column/row headers. Previously, there was no option to revert to the default sort order. Now, you can easily return to the default sort order by accessing the new option located in the top-right corner of the table.

*Below, you can see the new option to reset to the default sort order.*



## 7.3 Improved Workbook opening experience

Previously, when opening a saved Workbook, the default display was the result tab. Now, instead of automatically loading the result table, the default tab that opens is Rows & Columns. This change is designed to reduce loading times, especially for Workbooks with numerous sheets.



## 8 Data imports and integrations

### 8.1 Scheduled Data Import: enhanced control with end dates

When configuring a scheduled, ongoing data import, you now have the option to specify an expiration date for the job. This enhanced feature grants you greater control over your imports and the data utilized in reports, allowing you to proactively halt imports at a specific date.

*Here, you'll find the new control for setting an expiration date. If you leave it blank, the scheduled job will continue indefinitely until you manually choose to stop it.*

The screenshot shows the 'Scheduler' configuration interface. At the top, there are tabs for 'Basics', 'Advanced', 'Activation', and 'Schedule'. The 'Schedule' tab is active. A toggle switch labeled 'Activate scheduled import' is turned on. Below this, the 'Scheduler name' field contains 'Scheduled import task 9/15/2023'. The 'Schedule type' dropdown is set to 'Weekly'. Under 'Repeats on', the days 'Mon', 'Tue', 'Thu', and 'Fri' are selected. The 'Time' field is set to '17:00'. The 'Expiration date' field is empty, and a calendar is open below it, showing 'September 2023' with the 15th selected. At the bottom right, there are three buttons: 'CANCEL', 'IMPORT NOW AND SAVE', and 'SAVE'.



## 8.2 Forsta HX Platform connectivity enhancements

### 8.2.1 Import of sample data from the Forsta HX Platform, Formerly Forsta Plus, Surveys

The June 2023 release introduced the capability to enhance survey respondent data by incorporating information from the sample (the Respondent table) for those respondents who participated or initiated the survey. In this release new support for importing the whole sample (all respondents from the Respondent table) has been added which allows you to follow-up on fieldwork status such as number of emails sent, percentage share of completes, number of respondents that did not start the survey etc.

*Below, you'll find the new option for selecting whether to import survey data (Response table) or sample data (the Respondent table) when configuring the connection between the Visualization and a Forsta HX Platform Survey.*

The screenshot shows a configuration window for connecting a visualization to a Forsta HX Platform survey. At the top, there is a field for 'Forsta Plus Client Secret' with a masked password. Below this is the 'Survey details' section, which includes three tabs: 'Forsta Plus surveys' (selected), 'Surveys in Hub', and 'Custom Data Tables in Hub'. Under the 'Forsta Plus surveys' tab, there is a dropdown menu for 'Survey' with the selected item 'p840328349518 Survey Demo 123'. Below the survey selection is a text input field for 'Survey ID' containing 'p840328349518'. A 'Table' dropdown menu is open, showing three options: 'Response (Survey)' (highlighted in blue), 'Response (Survey)', and 'Respondent (Sample)'. At the bottom of the form, there is a 'Time period' dropdown set to 'Auto' and two buttons: 'CANCEL' and 'IMPORT NOW'.

**Note, it is recommended to report the Fieldwork status (the Respondent data) in a separate Visualization project to maintain a clear distinction between respondents (the sample) and their responses (the survey data). This separation**



***simplifies both report setup and update processes. Additionally, since samples can often be substantial in size, consolidating everything into a single project may have a negative impact on the performance of survey data reporting.***

To import both the full sample and the survey data into a single project, you need to create two separate import jobs. The first job should import the sample data, and the second job should import the survey data as "updates to existing" using the RespondentID as the mapping key. This configuration ensures that the survey data variables are appended to the sample respondents. The second job can be connected to the first so that it always runs as soon as the first one is completed. The second job can be connected to the first, so it always is run as soon as first is completed,



### 8.2.2 Import of "external" data from Custom tables

External data, unrelated to response data, such as media investments, sales data, web traffic, etc., stored in Hub, can now be imported into Visualization projects. This enables the integration of diverse data types, such as survey data and media investments, into a single dashboard. This import can be executed on-demand or configured as a scheduled job, allowing data to be imported daily, weekly, or as needed.

To import custom tables, navigate to the Forsta HX Platform import menu and select the new "Custom Data Tables in Hub" tab. Here, you can choose the Hub and the custom data table you wish to import. Since custom data must adhere to the data formatting rules within Visualizations, it should include a "Respondent id" variable. You can either include this variable within the custom table itself or add it using the "Meta Data Transformation" function, which allows you to incorporate Response id variables, among other options.

#### Example of Custom data import setup.



*8.2.3 Automatic question tagging for System variables, Hidden variables, and more*

In Forsta HX Platform Surveys variables can have properties such as SystemVariable, Background, Hidden, among others. These properties are now automatically assigned as question tags during the data import into Visualizations. You can utilize these tags on the Questions page to streamline your search for specific types of questions. This functionality simplifies tasks like deactivating all System variables, which is often necessary to hide them from tools like Crosstabulation and other reports.

The following question properties are added as question tags during the data import:

- Hidden
- Background
- SystemVariable
- RespondentVariable
- Exclude from reporting

**Note: Tags are only added during the initial import of a question. If a question already exists in the project, no additional tags are added. This means that the tags can be edited and removed after the initial import without losing changes if a second or subsequent import is made.**

Here we see an example of SystemVariable tags, in most right column, added automatically during the data import.

TEXT	TYPE	COLOR	ANSWER BLOCK	TAGS
respid	Numeric	●		SystemVariable
Interview Status	Single	●	Complete/Incomplete/Quota Full	SystemVariable
Interview Start	Date			SystemVariable
Interview End	Date			SystemVariable
Last channel used	Single	●	CAWI/CAPI/CATI	SystemVariable
Last device used	Single	●	Desktop/Touch/Generic	SystemVariable



### 8.3 SPSS export enhancements

The export functionality for SPSS files (.sav) has been enhanced to optionally include input variables which were not supported previously.

Furthermore, for faster exports and lighter file sizes, a new option is available to exclude all open-ended variables from the export. Including open-ended variables significantly increases file size and export time.

*The new options for including/excluding open ended variables and input variables in SPSS export.*

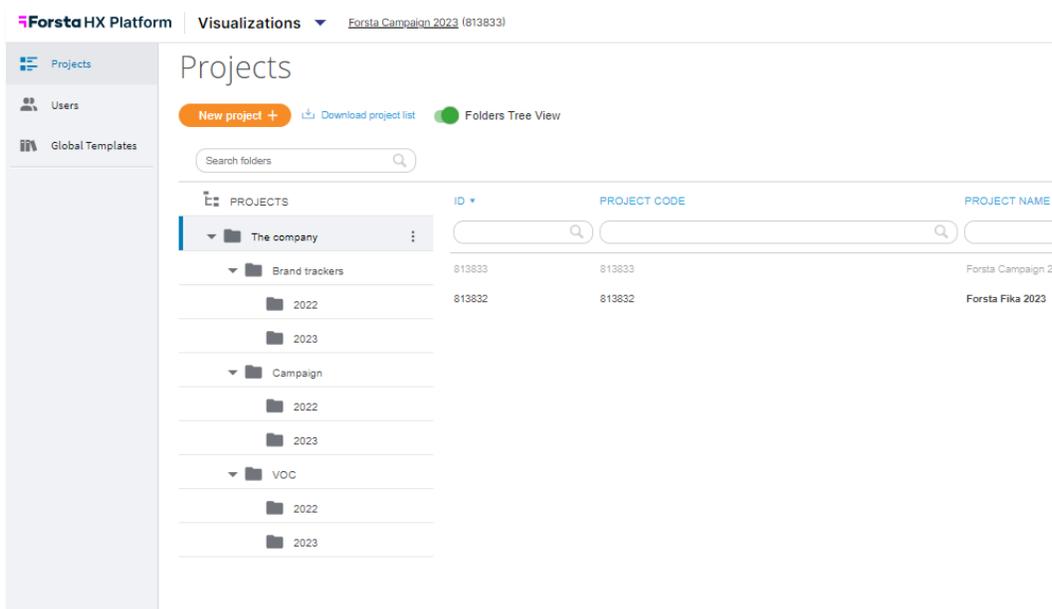
The screenshot shows a web-based configuration interface for exporting SPSS files. At the top left is a blue button labeled "Start export". Below it, the "Export type" section has two radio buttons: "Syntax" and "Spss file", with "Spss file" selected. A blue box highlights the "Include" section, which contains three checkboxes: "Looped data" (unchecked), "Open ended variables" (unchecked), and "Input variables" (unchecked). Below this, the "Decimal separator for open numeric questions" section has two radio buttons: "Dot (.)" (selected) and "Comma (,)" (unchecked). The "Multiple choice question separator" is an empty text input field. The "Email address" is an empty text input field. The "Subject" is a text input field containing "[domain] data export". The "Text" section contains a template message: "Your data export from project [project] is now ready for download. Please use following link to download your file: [link] Zip password: [password] File will be available on our servers for next 24 hours. You need to be logged in to system to be able to download the file." A small icon is visible in the bottom right corner of the form area.

## 9 Project selection page, improved overview and folder management

The three-level folder structure utilized to organize projects can now be visualized in a tree structure, offering a more convenient way to have an overview of all your folders and projects. Additionally, you now have the option to add new folders and rename folders directly from this interface. This improvement greatly simplifies the organization of your projects compared to the previous method, which required contacting the support team for such tasks.

The folder structure is enabled via the "Folder Tree View" switch as shown below.

*Here we see the new option to visualize the folder structure in Project selection page.*

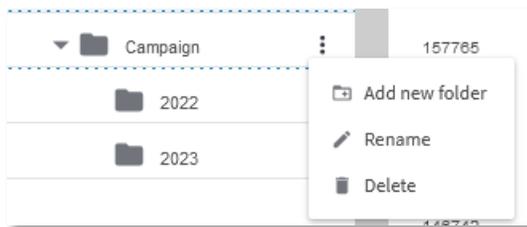


Please note that the search field above the project list will filter your project list only. The search field positioned above your folder tree will filter the tree structure, and once you select one of the nodes, the filtered list will display projects contained within that folder.

When you hover over each folder in the tree, you can initiate the following actions using the three-dot menu:

- **Add New Folder / Create New Project:** Depending on the context and the level within the tree, you will have the option to either add a new folder or create a new project. New
- **Rename:** This option allows you to rename the selected folder
- **Delete:** You can use this option to delete the selected folder

*The menu for managing folders.*



The availability of the options above will vary depending on your access rights and the specific level within the tree structure you are interacting with.

Here are the rules and limits for folders management:

- Each folder below the same parent must have a unique name.
- Folders that contain projects cannot be deleted.
- Folders that have subfolders cannot be deleted.
- New folders cannot be created at level 1 (the main level).