

Forsta Visualizations June 2023 Release



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1 Introduction

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

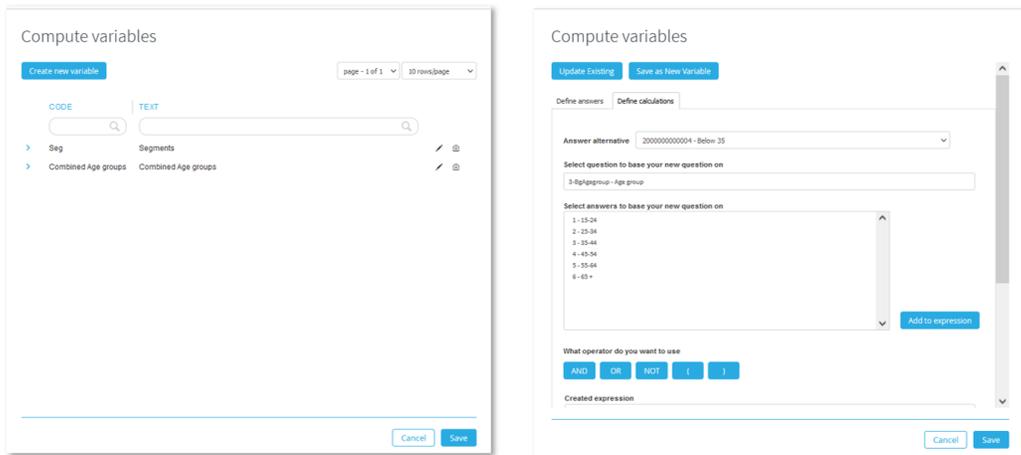
- In the Respondent table object, you can now apply the same formatting rule to multiple variables, saving time during setup and maintenance of reports. Previously, a formatting rule could only be applied to one variable at the time. Here is an example where column 3-6 shares same rules.

Response Date	Gender	Q1	Q2	Q3	Q4
2021-01-01	Woman	2	2	1 Not at all likely	2
2021-01-01	Man	5 Very likely	2	Don't know	4
2021-01-01	Woman	5 Very likely	1 Not at all likely	3	4
2021-01-02	Woman	2	3	5 Very likely	3
2021-01-02	Man	5 Very likely	3	1 Not at all likely	3
2021-01-02	Man	3	5 Very likely	5 Very likely	1 Not at all likely
2021-01-02	Woman	5 Very likely	4	3	1 Not at all likely
2021-01-02	Woman	4	2	1 Not at all likely	2
2021-01-03	Man	1 Not at all likely	3	4	3
2021-01-03	Woman	4	1 Not at all likely	4	4
2021-01-03	Woman	Don't know	5 Very likely	2	
2021-01-04	Man	4	1 Not at all likely	3	4
2021-01-05	Man	1 Not at all likely	1 Not at all likely	5 Very likely	1 Not at all likely
2021-01-05	Man	3	3	2	3
2021-01-05	Man	1 Not at all likely	1 Not at all likely	3	2

- Relative time period filtering in StoryTeller charts and tables is updated to support more use cases such as showing data from the last 365 days, allowing for an aggregated result over the exact past year. Previously, there was a maximum limit of 100 in function “Show last X days/weeks/months/quarters/years”, but this limit is now removed.

Crosstable tool

- The user interface for creating computed variables in the CrossTable tool has been redesigned to improve the overall end-user experience. These images show examples of the new design in use.



Data imports

- When importing survey data (Response data) from Forsta Plus, you now have the option to extend the survey dataset by incorporating variables from the corresponding Respondent data (sample) or any Custom data table in Hub. This is particularly useful in CX programs where the sample often includes additional report-related information that may not always be present in the survey data.



- Single choice questions in Forsta Plus that have specified scores are imported into Forsta Visualization as scale questions (score= average factors). Previously, scores were only imported to Visualization during the initial data import so if scores were later changed in Forsta Plus, they were not updated in the Visualizations. A new setting has been introduced for continuous updating of the scores in Visualizations. This setting is turned off by default so existing and newly created data imports will continue to use the old logic for score calculation unless the setting is manually enabled.
- The Import scheduler, which is used to import data files from FTP sites and other sources, has now a completely redesigned interface. The new interface provides improved grouping of settings, making it more user-friendly and intuitive for users.
- Data page efficiency updates.
 - Long file names were previously truncated and only shown in tooltips, making it difficult to get a clear overview of activated/deactivated files. The file name editing process has been changed which results in a wider file name column, allowing you to see the full file name in most use cases. The same logic has been applied to file tags as well.
 - You can now choose the number of data batches to be displayed in the same view on the Data page. This feature simplifies the selection of multiple batches and provides a better overview of the imported batches. Previously, the data page only showed 20 batches per view.

Project administration

- A new column has been added to the Questions page which displays the Filter IDs, this enhancement enables users to easily identify the distinct filter variables. The filter IDs are particularly useful when configuring user access rights through Excel uploads, especially in cases where multiple filters share the same labels.



3 StoryTeller

3.1 Formatting rules in Respondent tables

In the Respondent table object, you can now apply the same formatting rule to multiple variables, saving time during setup and maintenance of reports. Previously, a formatting rule could only be applied to one variable.

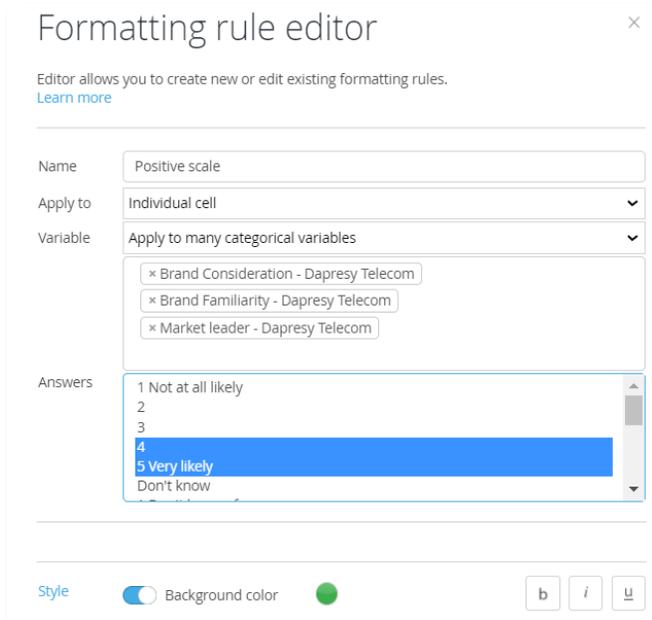
Below is an example of the Respondent table where the same rule has been applied to four columns (Q1,-Q4), as they all are based on same formatting conditions.

Response Date	Gender	Q1	Q2	Q3	Q4
2021-01-01	Woman	2	2	1 Not at all likely	2
2021-01-01	Man	5 Very likely	2	Don't know	4
2021-01-01	Woman	5 Very likely	1 Not at all likely	3	4
2021-01-02	Woman	2	3	5 Very likely	3
2021-01-02	Man	5 Very likely	3	1 Not at all likely	3
2021-01-02	Man	3	5 Very likely	5 Very likely	1 Not at all likely
2021-01-02	Woman	5 Very likely	4	3	1 Not at all likely
2021-01-02	Woman	4	2	1 Not at all likely	2
2021-01-03	Man	1 Not at all likely	3	4	3
2021-01-03	Woman	4	1 Not at all likely	4	4
2021-01-03	Woman	Don't know	5 Very likely	2	
2021-01-04	Man	4	1 Not at all likely	3	4
2021-01-05	Man	1 Not at all likely	1 Not at all likely	5 Very likely	1 Not at all likely
2021-01-05	Man	3	3	2	3
2021-01-05	Man	1 Not at all likely	1 Not at all likely	3	2

As each variable type (e.g., Categorical and Numeric) has different logic for creating conditions the same formatting rule can only be applied to questions of same type. To create a rule to be applied to multiple variables complete the following steps:

- Select the option to apply the rule to multiple variables and specify the variable type (only applicable when rule is applied to each individual cell and not the entire respondent).
- Add the variables to which you want to apply the formatting rule.
- Define the rule using the same logic as before.

Example of a rule applied to multiple categorical variables.

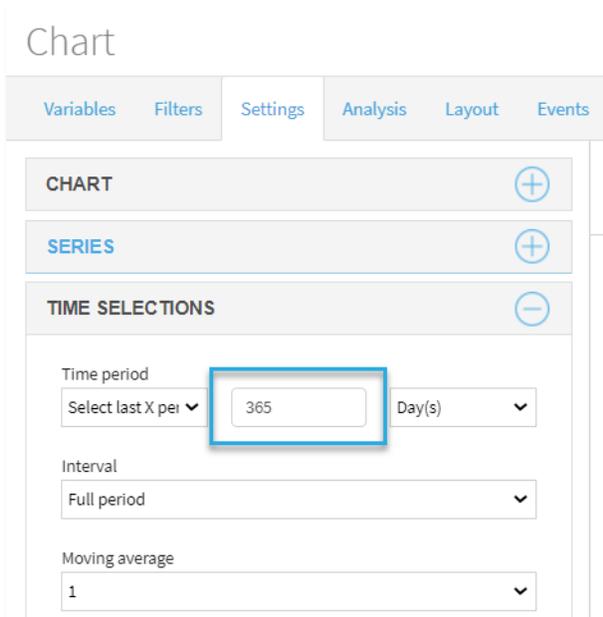




3.3 Relative time filtering

The relative time period filtering in StoryTeller data objects, such as charts and tables, has been updated. Previously, when applying time filters like "Last X days," there was a maximum limit of 100 days/weeks/months/quarters/years which now has been removed. Consequently, a chart can now present data from the last 365 days, allowing for an aggregated result over the exact past year, for instance.

Relative time period filtering setup in a StoryTeller chart. The limit of max 100 is now removed.

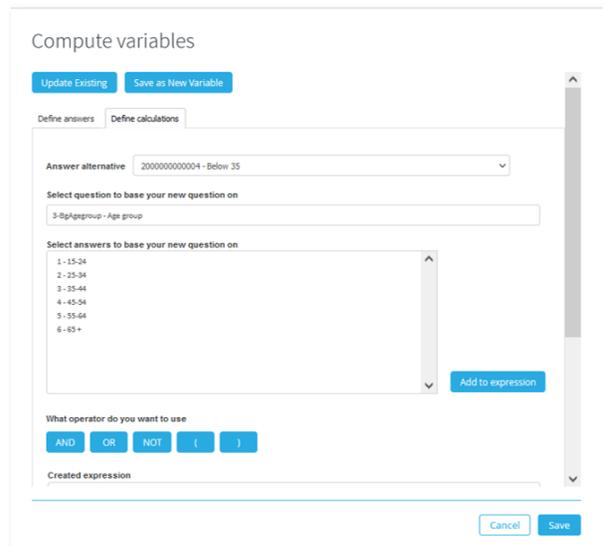
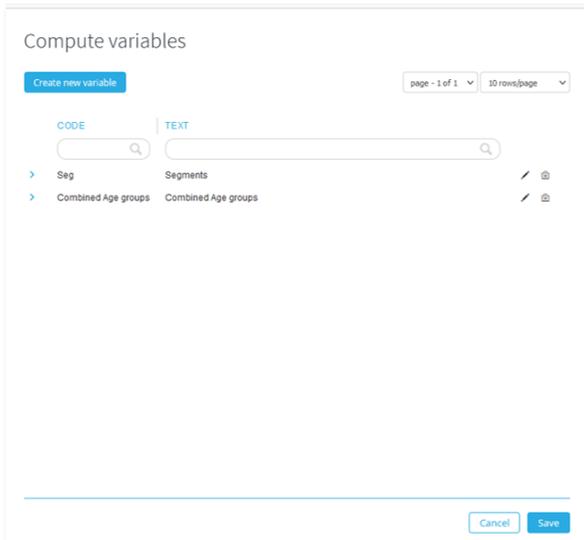


4 Crosstable tool

4.1 Compute variables - design updates

The user interface for creating computed variables in the Crosstable tool has been redesigned to improve the overall end-user experience. Below images shows example view of the new design.

Below we see examples of the new design. The flow and logic for computing variables remain the same as before the update.





5 Data

5.1 Forsta Plus data import, include variables from Respondent table and Custom tables

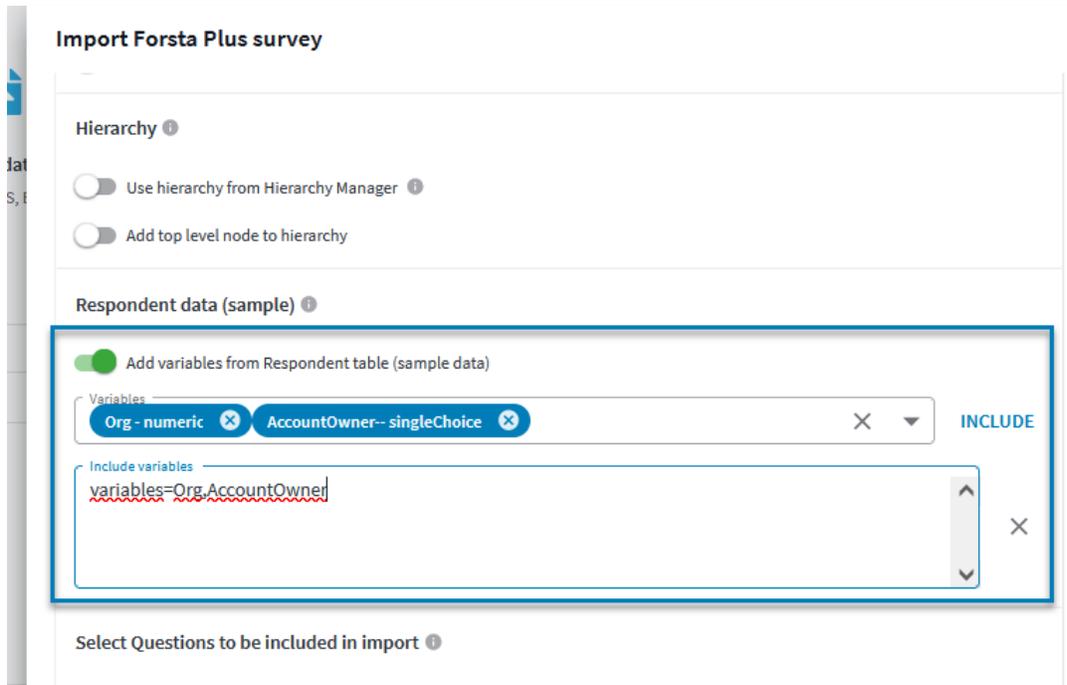
When importing survey data (response data) from Forsta Plus, you now have the option to extend the survey dataset by incorporating variables from the corresponding Respondent data (sample) or any Custom data table in Hub. This is particularly useful in CX programs where the sample often includes additional report-related information that may not always be present in the survey data.

5.1.1 Add variables from Respondent table

You can include variables from the Respondent table when importing a Forsta Plus survey or an Auto-combined survey. Follow these steps to add variables from the Respondent table to the survey data set:

- Create an import task for the survey as usual.
- In the Advanced tab, enable the option "Add variables from Respondent table".
- From the dropdown list, select the variables you want to include and click "Include" (Not all variables are selected by default to prevent unnecessary import of Personally Identifiable Information).
- The selected variables will be displayed in the "Include variable" field.

The image highlights the new options for include variables from Respondent data.



The variables from the Respondent table are imported as an "Update to existing" dataset. This dataset includes the selected variables for the responses (records) that exist in the corresponding survey data file. Respondent data will only be imported for the responses (records) that are present in the response data. For example, if the response data (survey data) includes Resplds 1, 2, 43, 51, and 122, the Respondent data set will include data for the same Resplds (1, 2, 43, 51, and 122).

The variables from the Respondent data table receive a suffix, "_RespondentData" added to the Variable code during the import to avoid conflicts with variables from the Response data. For example, if the variable code in the Respondent data table is "Org" it will be imported with the code "Org_RespondentData"



Below is a simplified example of the Respondent and Response tables in Forsta Plus. The third table illustrates the data structure in Visualizations after import and activation, assuming the user has chosen to include the Org and AccountOwner variables.

Respondent table in Forsta Plus

RespID	Status	CreateDate	Org	AccountOwner
1	Complete	2023-01-20	Unit A	John
2	Not started	2023-01-20	Unit A	Paul
3	Not started	2023-01-20	Unit B	Sarah
4	Complete	2023-01-20	Unit B	Sarah
5	Complete	2023-01-20	Unit C	John

Response table (survey data) in Forsta Plus

RespID	Responseid	Status	Interview_start	Q1	Q2
1	1	Complete	2023-01-20	4	5
4	4	Complete	2023-01-21	5	4
5	5	Complete	2023-01-25	3	4

After importing and activating the data in Forsta Visualization, assuming that the variables "Org" and "AccountOwner" have been imported, the data structure would be as follows.

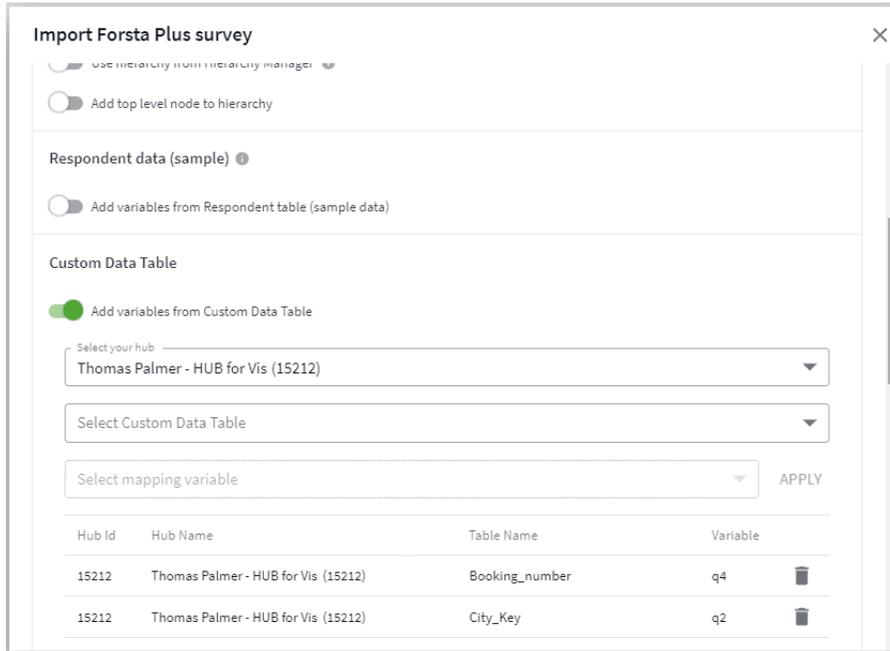
RespID	Responseid	Status	Interview_start	Q1	Q2	Org_RespondentData	AccountOwner_RespondentData
1	1	Complete	2023-01-20	4	5	Unit A	John
4	4	Complete	2023-01-21	5	4	Unit B	Sarah
5	5	Complete	2023-01-25	3	4	Unit C	John

5.1.2 Add variables from Custom table

To add variables from Custom data tables to the survey data set, follow these steps:

- Create an import task for the survey as usual.
- In the Advanced tab, enable the option "Add variables from Custom data table".
- Select the Hub and Custom table.
- Choose the mapping variable (more information provided below).
- Click on the Apply button
- If you need to import data from more than one Custom table, repeat the last three steps.

The image shows the new options for include variables from Custom data. In this example we see that two custom tables have been selected.



The mapping variable is crucial for linking the records in the custom table to the survey responses. The mapping variable must have the same variable code in both the survey data and the custom table.

It is possible to have either a one-to-one mapping or a one-to-many mapping (where a single data record in the custom table updates multiple data records in the survey data).

When using a categorical variable as the mapping variable, the mapping is based on the answer label rather than the answer code. Please note that looped variables cannot be utilized as mapping variables.



The variables from the selected custom tables are imported as an "Update to existing" dataset. One dataset is created for each selected custom table. Each of these datasets contains records (data rows) that correspond to records in the survey data, based on the selected mapping variable. For example, if a variable like " CustomerType " is used to map records and the custom table contains options for Type A, Type B, Type C and Type D but the imported survey data only includes records corresponding to A and B the imported custom data will only include the records for Type A and B, not for Type C and D.

The variables from the Custom data table receive a suffix, "_CustomData" added to the Variable code during the import to avoid conflicts with variables from the Response data. For example, if the variable code in the Custom data table is "CustomerType" it will be imported with the code " CustomerType _CustomData".

Below is a simplified example. The first table displays survey data in Forsta Plus, while the second table represents a custom data table. The third table showcases the data structure in Visualizations after importing and activating the data. It assumes that the user has opted to include data from this custom table and has been utilizing "Company" as the mapping variable.

Response table (survey data) in Forsta Plus

RespID	Responseid	Status	Interview_start	Q1	Q2	Company
1	1	Complete	2023-01-20	4	5	Tech Solutions
4	4	Complete	2023-01-21	5	4	Innovations XYZ
5	5	Complete	2023-01-25	3	4	Innovations XYZ

Custom data table in Forsta Plus

Company	CustomerType
Tech Solutions	Type B
Innovations XYZ	Type A
IndSwed	Type C
NoventC	Type C

After importing and activating the data in Forsta Visualization ("Company" is used as mapping variable).

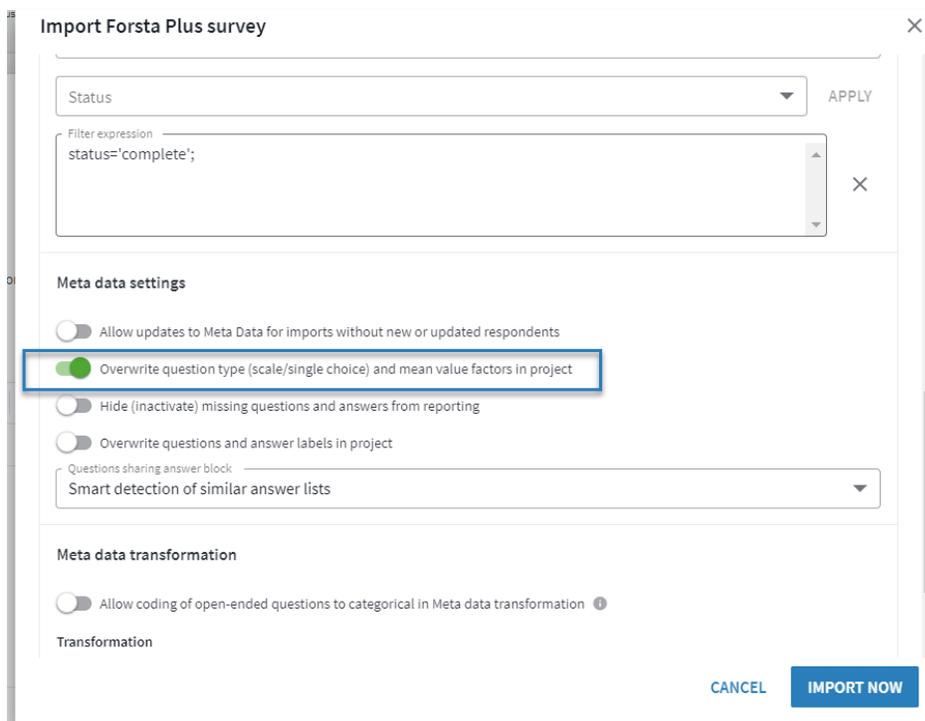
RespID	Responseid	Status	Interview_start	Q1	Q2	Company	CustomerType_CustomData
1	1	Complete	2023-01-20	4	5	Tech Solutions	Type B
4	4	Complete	2023-01-21	5	4	Innovations XYZ	Type A
5	5	Complete	2023-01-25	3	4	Innovations XYZ	Type A



5.2 Forsta Plus data import, update Factor averages (scores)

Single choice questions in Forsta Plus that have specified scores are imported into Forsta Visualization as scale questions. The score is equivalent to the factor average value and is used in mean value calculations. Previously, scores were only imported to Visualizations during the initial data import. If scores were later changed in Forsta Plus, they were not updated in the Visualizations. To address this and support a workflow where scores can be edited in Forsta Plus at any time and automatically update the Visualizations project, a new setting has been introduced. This setting enables continuous updating of the scores, which corresponds to the factor's average value.

Here we see the new setting, when this setting is enabled the score of the questions are updated in Visualizations in every data import from Forsta Plus.



Note: When the new setting is enabled all the single choice and scale questions included in the import will be updated to the specified type, and all factors within a scale question will be updated and replaced. If any manual changes have been made within the project, these will be overwritten, and the new factors will be used in all reporting.

5.3 Import scheduler, updated user interface

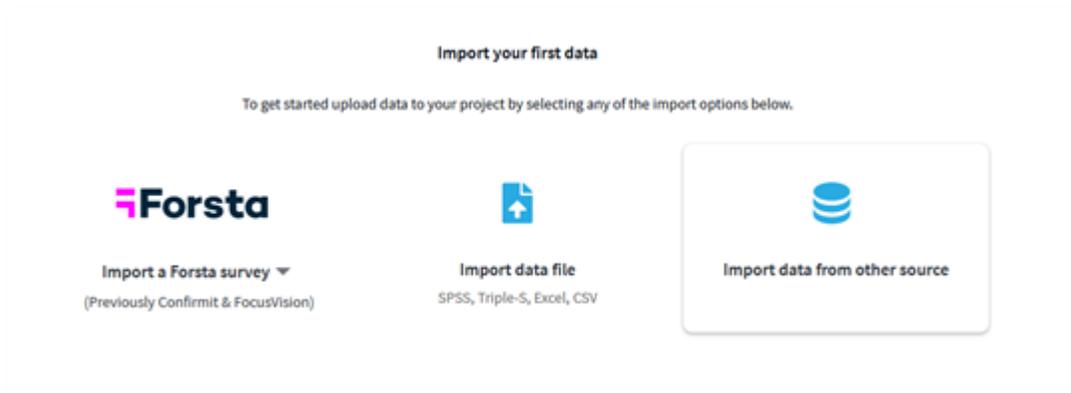
The Import scheduler, which is used to import data from FTP sites and other sources, has now a completely redesigned interface. The new interface provides improved grouping of settings, making it more user-friendly and intuitive to use for users.

In 5.3.1 you see the new interface for creating/editing a scheduled import job and in 5.3.2 where all created jobs are listed and how to enter those for editing.

5.3.1 Create import job

To create a new scheduled import, use the same option as before on the Data page: "Import data from other sources." The popup that appears now has a new design, but the functionalities remain the same as in the old interface.

Click Import data from other sources to create new scheduled import job.

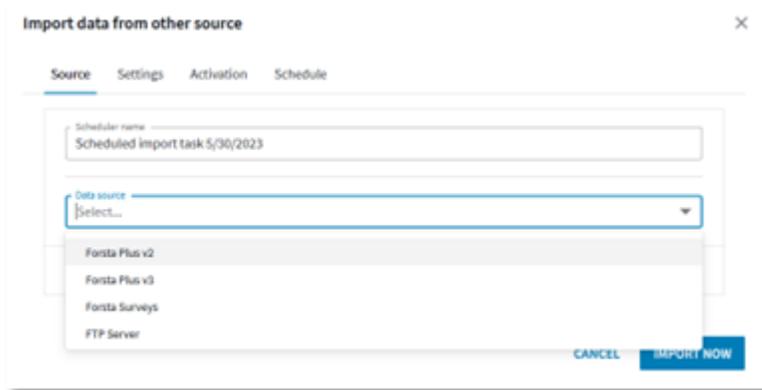


The popup window for creating and editing scheduled jobs is divided into four tabs:

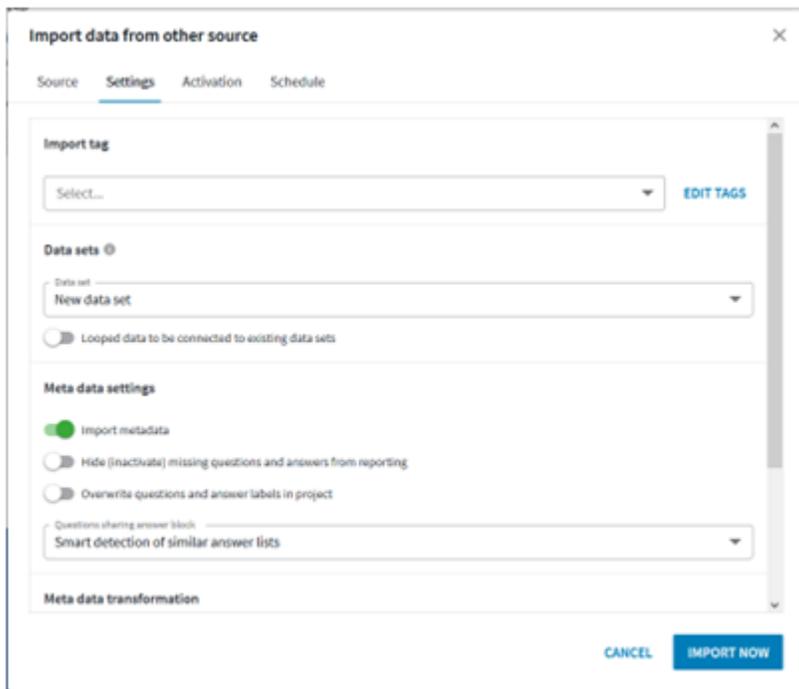
- Source
- Settings
- Activation
- Schedule



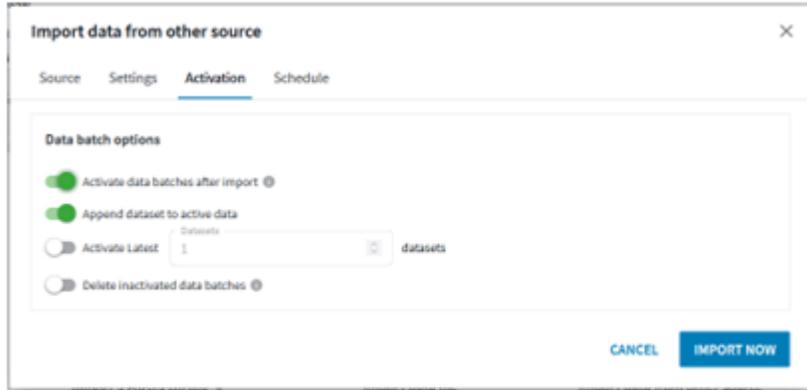
Under the **"Source"** tab, you will find all the settings specific to the data source, along with the name of the job. This section contains configuration options such as URLs, credentials, and system settings that are specific to this connection.



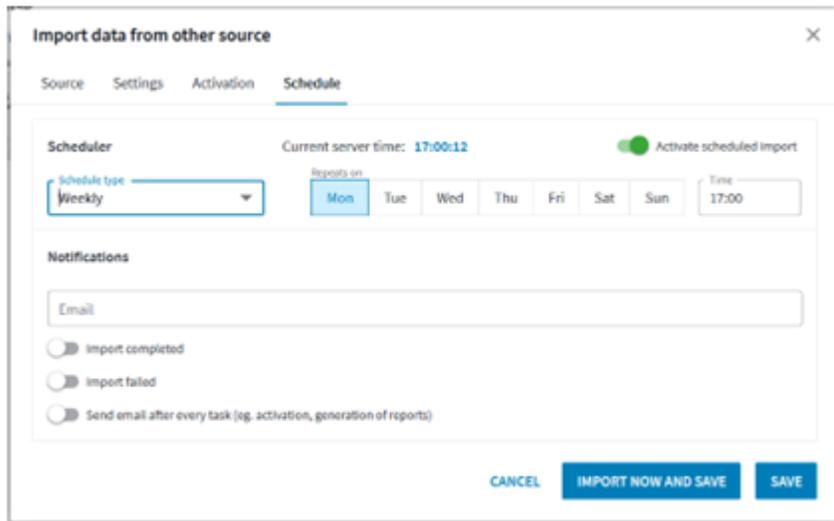
Under the **"Settings"** tab, you will find all the Forsta Visualizations settings related to import. This includes features such as Meta Data transformation and settings for how answer blocks are created.



Under the **"Activation"** tab, you will find optional options related to the activation process.



Under the **"Schedule"** tab, you will find options for scheduling your import. You can specify the frequency of imports and choose whether to receive notifications. These options are not mandatory.

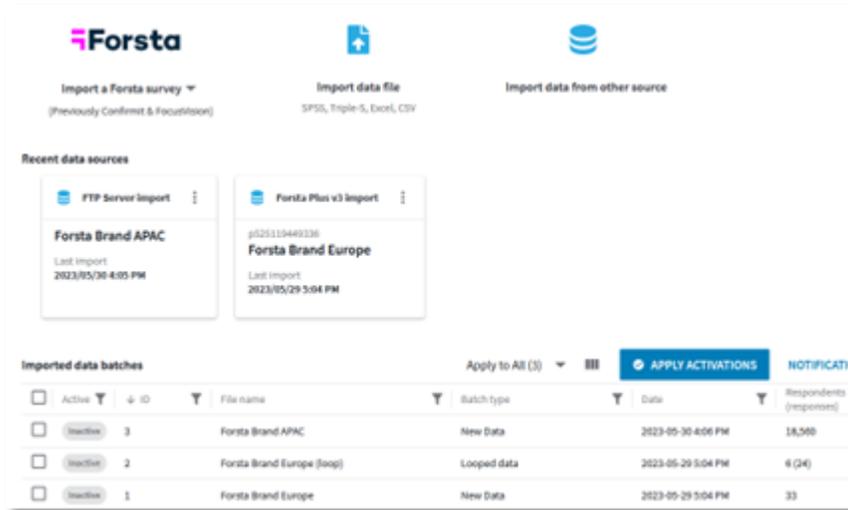




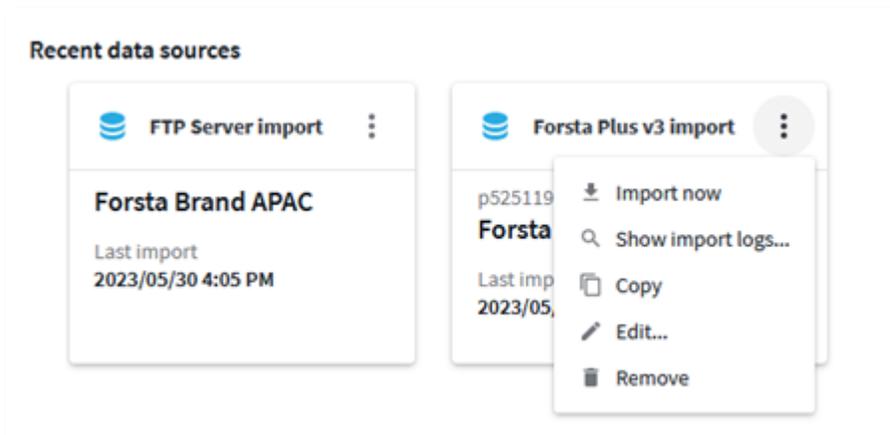
5.3.2 List of created Import jobs

All created scheduled import jobs are displayed as cards at the top of the data page. Each card provides information such as the data source, job name, last import status, and any errors encountered during the last import.

Example from a project with two scheduled import tasks.



To make adjustments or changes to an existing task, simply use the corresponding card to edit it.





There are five options available in the three dots menu:

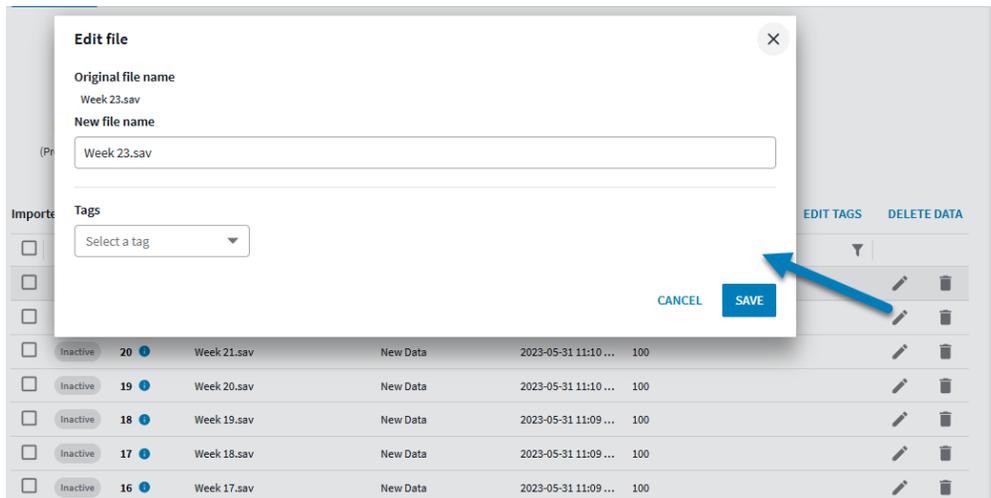
- Import now: This option allows you to rerun the import without needing to enter the card again.
- Show import logs: Use this option to display the logs for the job.
- Copy: Choose this option to make a copy of the job.
- Edit: Selecting this option will allow you to enter the job and edit all available options.
- Remove: This option enables you to delete the scheduled job.

5.4 Data page efficiency updates

5.4.1 New interface for editing file names and Tags

Long file names were previously truncated and only shown in tooltips, making it difficult to get a clear overview of activated/deactivated files. To address this issue, the file name editing process has been changed. Instead of inline editing in the grid listing all the data files, edits are now made in a popup Edit view. As a result of this change, the file name column is wider, allowing you to see the full file name in most use cases. The same logic has been applied to file tags as well.

To edit the file name or tags, use the new "Edit" icon highlighted below. Click on the icon to open the edit window.

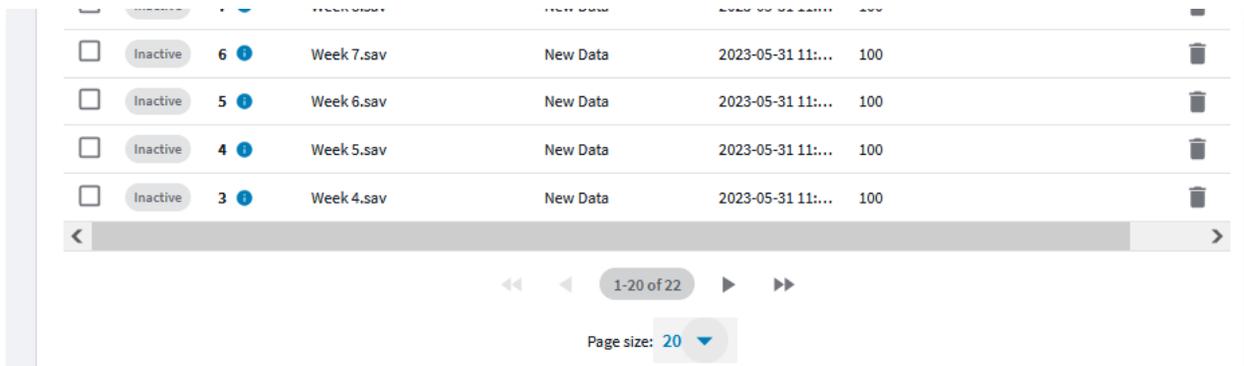




5.4.2 Data batches grid – control number of batches shown in same view

You can now choose the number of data batches to be displayed in the same view on the Data page. This feature simplifies the selection of multiple batches and provides a better overview of the imported batches. Previously, the data page only showed 20 batches per view.

Below we see new paging control where page size can be changed. Same paging control I also added to Delete Data batches page.





6 Project administration

6.1 Questions page, show Filter IDs

A new column has been added to the Questions page which displays the Filter IDs, this enhancement enables users to easily identify the distinct filter variables. The filter IDs are particularly useful when configuring user access rights through Excel uploads, especially in cases where multiple filters share the same labels.

The Filter ID column is hidden by default, use the column selector panel to turn on the new Filter ID column.

The screenshot shows a table with the following columns: ID, CODE, TEXT, TYPE, COLOR, ANSWER BLOCK, FILTER, FILTER TEXT, and FILTER ID. The table contains 10 rows of filter data. A column selector panel is open on the right, showing a list of columns with checkboxes. The 'FILTER ID' checkbox is checked and highlighted with a blue box. A blue arrow points from this box to the 'FILTER ID' column header in the table.

ID	CODE	TEXT	TYPE	COLOR	ANSWER BLOCK	FILTER	FILTER TEXT	FILTER ID
1	BgCurrentOp	Current operator	Single		Dapresy Telecom/Four/Swedish ...			
2	BgSubscrType	Prepaid or Postpaid	Single		Prepaid/Postpaid			
3	BgAgegroup	Age group	Single		15-24/25-34/35-44		Age group	1
4	BgGender	Gender	Single		Man/Woman		Gender	2
5	Seg1	Segments	Scale		Seg1		Segments	4
6	Seg2	Segments	Scale		Seg2		Segments	5
7	Bgincome	Household Income	Single		Less than 25 000 Euro/25 000-3...		Household Income	3
8	BrAwaToM	Spontaneous brand awarene...	Single		Dapresy Telecom/Four/Swedish ...			
9	BrAwaIM	Spontaneous brand awarene...	Multi		Dapresy Telecom/Four/Swedish ...			
10	AdPacToM	Spontaneous advertising cam...	Single		Dapresy Telecom/Four/Swedish ...			