

# **Forsta Visualizations**

## **September 2022 Release**



# Table of Contents

- 1 Introduction ..... 3
- 2 Overview..... 4
- 3 StoryTeller updates..... 7
  - 3.1 Report templates - Wordclouds and Respondent tables ..... 7
  - 4 Crosstable tool updates ..... 8
- 4.1 Workbook level filters ..... 8
- 5 Report user administration..... 11
  - 5.1 User tags in Event setup ..... 11
  - 6 Data imports and activation ..... 12
    - 6.1 Notification email on data activation ..... 12



# 1 Introduction

This document describes new and improved features in the Forsta Visualizations 2022 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

### StoryTeller

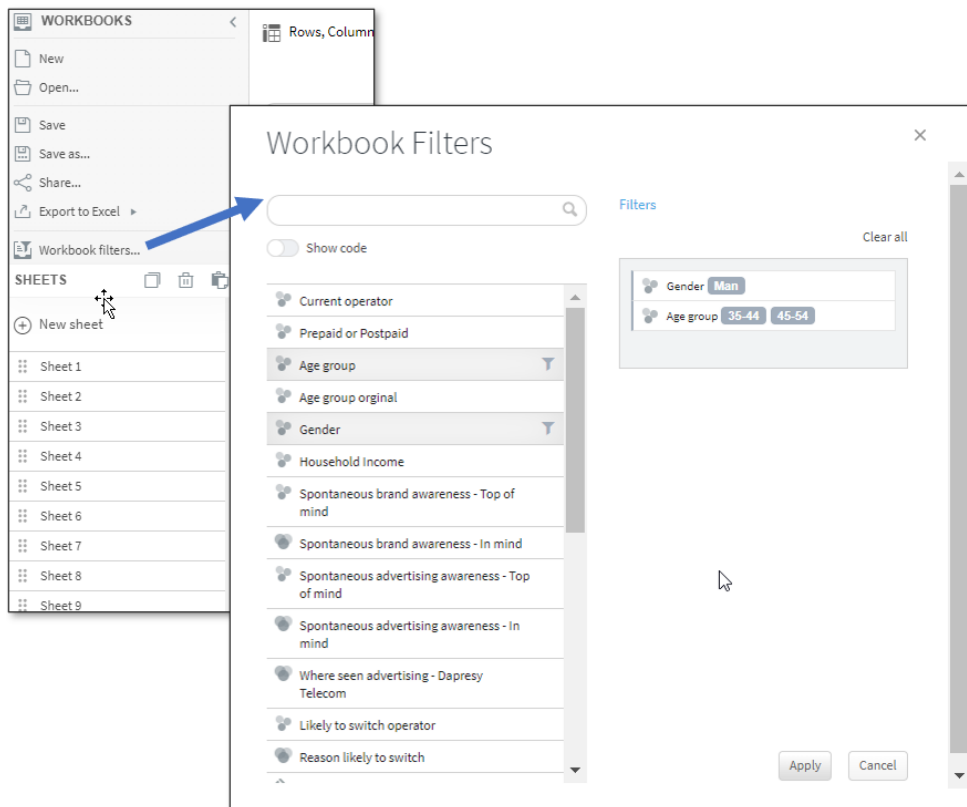
- When saving Word clouds and Respondent tables as templates, the codes of the included questions and filters are now stored as a part of the template. When template is loaded, it will be populated with the right variables automatically based on matching codes. The same logic was introduced in charts, tables and dynamic icons in previous release. By using the new template logic, the report setup, of surveys with similar questionnaires, is more efficient as a big portion of the setup can be automated.

*Example of a respondent table with formatting rules which also are saved as a part of the template.*

RESPONSES					
Response date	Overall satisfaction (1-5)	Likelihood to recommend (0-10)	Feedback	First name	Family name
2019-03-27	2	0	Everything was very nice, but considering the price of the car I which there wouldnt have been so much fuss about getting extra tires	Audra	ALVARADO
2019-03-26	2	5		Audre	GREER
2019-03-25	5	3	Very knowledgable and nice, it was a pleasure to buy the car. I will definity buy my next Porsche here too	Rani	WILLIAMS
2019-03-24	3	8	Most of it was good, but the car wasnt cleaned properly when delivered, didnt feel very premium	Shelbi	FARMER
2019-03-23	3	8		Shelby	DELGADO
2019-03-22	3	8	The delivery was a bit late, but everything else was very good	Shella	AGUILAR
2019-03-21	5	9	Great team, they were so helpful the whole way through!	Rania	JONES
2019-03-20	5	9		Ranice	BROWN
2019-03-19	4	9		Selena	BARRETT
2019-03-18	5	10	Great service!	Ranique	DAVIS
2019-03-17	4	10	Very knowledgable and nice, it was a pleasure to buy the car. I will definity buy my next Porsche here too	Selene	OBREN
2019-03-16	4	10	Great team, they were so helpful the whole way through!	Selestina	CASTRO

## Crosstable tool

- A new Workbook level filter concept has been added for a better table production process and for easier data exploration. With the workbook filters all the sheets are filtered from a single location which is a huge time saver in Workbooks with many sheets. Below we see an example, gender and age are applied as workbook filters.





### **Report user administration**

- The Report user tags are now shown in the Event setup page which makes it faster to assign multiple users to an Event. By for example having a country tag on each user all the users belonging to a specific country can easily be assigned to an Event by searching for the tags instead of the individual email addresses.

### **Data imports and activation**

- A notification email can now be sent out on completion of manually started data activations which is useful in huge projects with long running activations.

## 3 StoryTeller updates

### 3.1 Report templates - Wordclouds and Respondent tables

When saving Word clouds and Respondent tables as templates the code of the included questions and filters are now stored as a part of the template. When template is used, it becomes populated with the right variables automatically based on the stored codes. The same logic was introduced in charts, tables and dynamic icons in previous release. By using the new template logic the report setup, of surveys with similar questionnaires, becomes more efficient as a big portion of the setup can be automated.

Data related items saved into template library in a Respondent table template:

- Questions, including sort order and custome titles
- Filters, including time period
- Optional filter exclusions
- Formatting rules

Data related items saved into template library in a Word cloud template:

- Questions, including sort order and custome titles
- Filters, including time period

The codes of the used questions/filters and the other data related settings listed above are saved automatically when adding the Respondent tables and Word clouds to the template library, there is no new setting that needs to be applied.

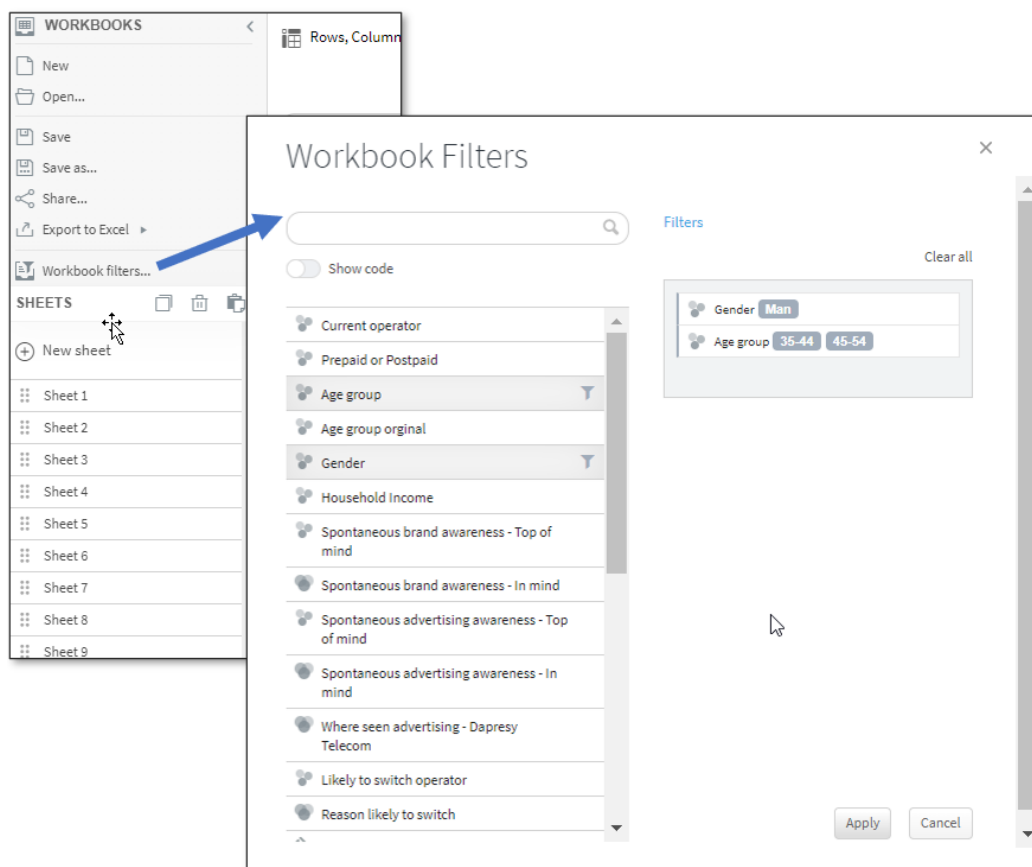
When the templates are inserted, the data objects are populated with the right questions etc. automatically if they exist. If not, the template wizard is used to select the data to be shown in the newly added objects.

## 4 Crosstable tool updates

### 4.1 Workbook level filters

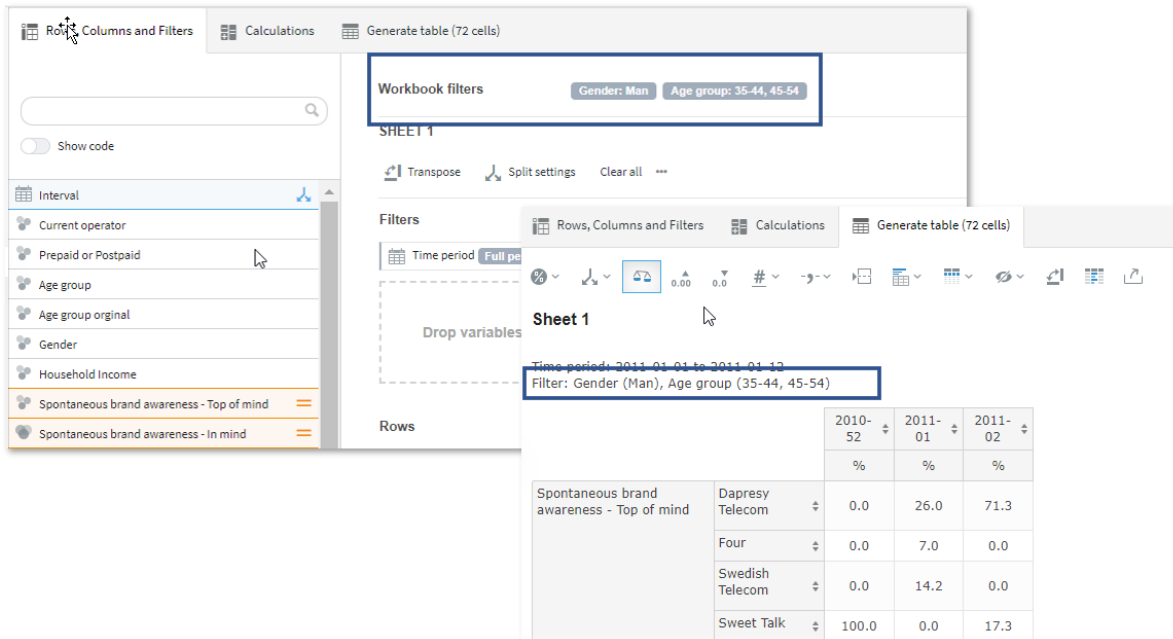
A new Workbook level filter concept has been added for a more efficient table production process and for easier data exploration. With the workbook filters all the sheets are filtered from a single location which is a huge time saver in Workbooks with many sheets.

*The Workbook level filters panel is in the Workbooks and Sheet panel as shown in the image below.*





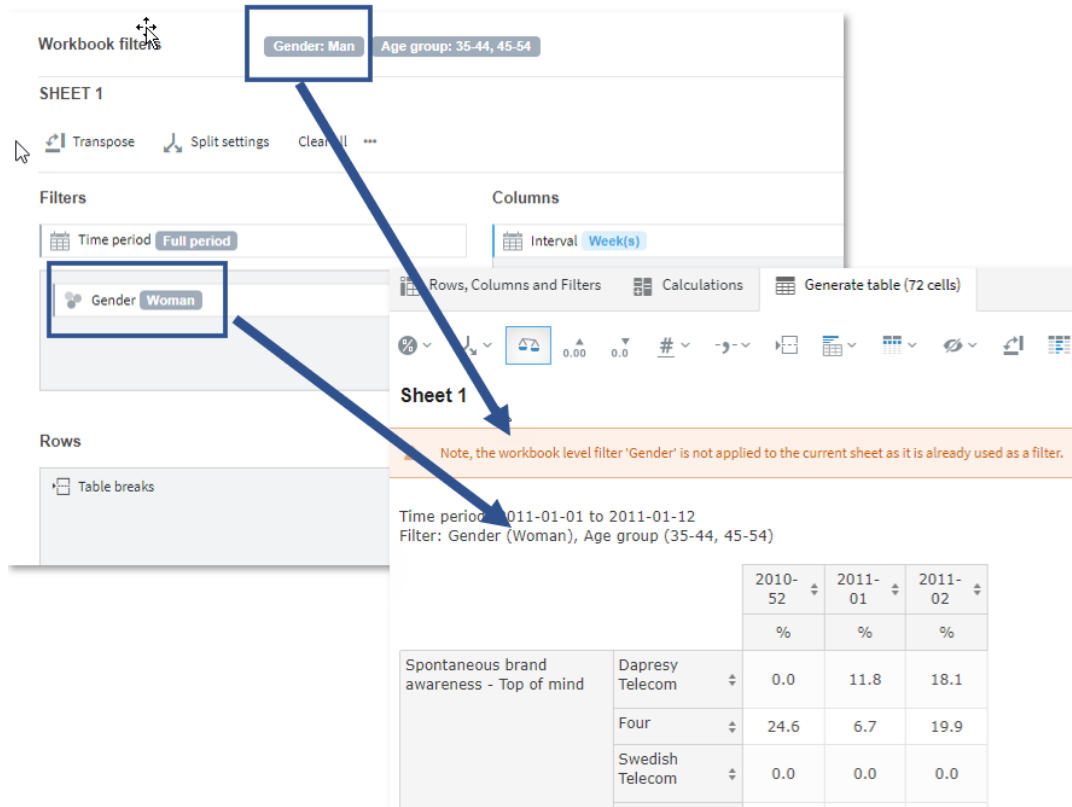
Applied Workbook filters are displayed at the top of each sheet and also in table key like the ordinary sheet level filters.



The screenshot displays the Forsta software interface. On the left, a sidebar lists variables for filtering, including 'Interval', 'Current operator', 'Prepaid or Postpaid', 'Age group', 'Age group original', 'Gender', 'Household Income', 'Spontaneous brand awareness - Top of mind', and 'Spontaneous brand awareness - In mind'. The main area shows 'SHEET 1' with a 'Workbook filters' section at the top, which includes 'Gender: Man' and 'Age group: 35-44, 45-54'. Below this, a 'Filters' section shows 'Time period: 2011-01-01 to 2011-01-12' and 'Filter: Gender (Man), Age group (35-44, 45-54)'. A data table is displayed below the filters, showing 'Spontaneous brand awareness - Top of mind' for various telecom providers across three time periods.

		2010-52	2011-01	2011-02
		%	%	%
Spontaneous brand awareness - Top of mind	Dapresy Telecom	0.0	26.0	71.3
	Four	0.0	7.0	0.0
	Swedish Telecom	0.0	14.2	0.0
	Sweet Talk	100.0	0.0	17.3

The same variable cannot be applied as both Question/Split/Filter and a Workbook filter. If a variable is applied in the sheet setup and as Workbook filter the Workbook filter is ignored. In the image below we see an example of this scenario, Gender=Male is applied as Workbook filter and Gender=Woman as sheet filter → the Workbook filter Gender=Male is ignored and a warning message is shown for the user.



The screenshot illustrates a conflict in the Forsta software interface. On the left, the 'Workbook filters' panel shows 'Gender: Man' selected. Below it, the 'Filters' panel shows 'Gender: Woman' selected. A blue arrow points from the 'Gender: Man' filter to a message in the 'Sheet 1' panel. The message states: 'Note, the workbook level filter 'Gender' is not applied to the current sheet as it is already used as a filter.' The 'Sheet 1' panel also shows 'Time period: 2011-01-01 to 2011-01-12' and 'Filter: Gender (Woman), Age group (35-44, 45-54)'. Below this, a table displays data for 'Spontaneous brand awareness - Top of mind' across three time periods (2010-52, 2011-01, 2011-02) for three categories: Dapresy Telecom, Four, and Swedish Telecom.

		2010-52	2011-01	2011-02
		%	%	%
Spontaneous brand awareness - Top of mind	Dapresy Telecom	0.0	11.8	18.1
	Four	24.6	6.7	19.9
	Swedish Telecom	0.0	0.0	0.0

As the same variable cannot be used in the sheet definition and as a Workbook filter simultaneously the hierarchy structure can never be used as Workbook level filter as the hierarchy is always applied on a sheet level.

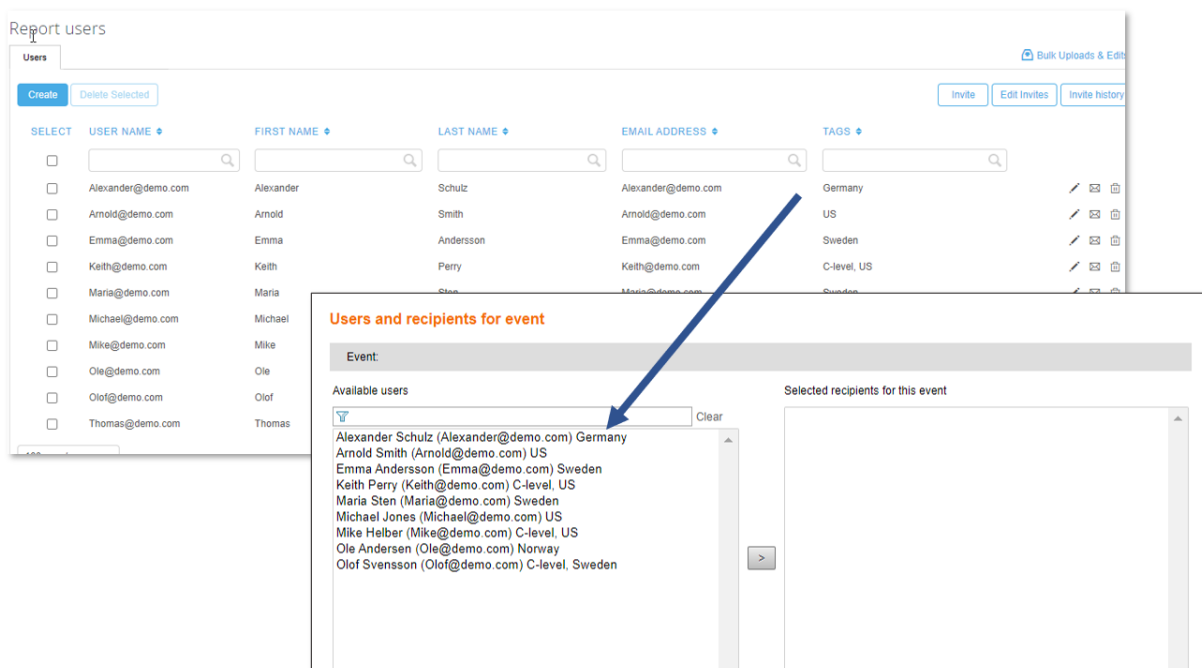
Workbook level filters are not available in Cross table reports using Variable subsets as all the different sheets could have different sets of available variables when Variable subsets are used.

## 5 Report user administration

### 5.1 User tags in Event setup

Report user tags are now shown in the Event setup page which makes it faster to assign multiple users to an event. By for example having a country tag on each user all the users belonging to a specific country can easily be assigned to an event by searching for the tags instead of the individual email addresses.

*Below we see that the tags from Report user page now also are shown in Event setup page.*



**Report users**

SELECT	USER NAME	FIRST NAME	LAST NAME	EMAIL ADDRESS	TAGS
<input type="checkbox"/>	Alexander@demo.com	Alexander	Schultz	Alexander@demo.com	Germany
<input type="checkbox"/>	Arnold@demo.com	Arnold	Smith	Arnold@demo.com	US
<input type="checkbox"/>	Emma@demo.com	Emma	Andersson	Emma@demo.com	Sweden
<input type="checkbox"/>	Keith@demo.com	Keith	Perry	Keith@demo.com	C-level, US
<input type="checkbox"/>	Maria@demo.com	Maria	Sten	Maria@demo.com	Sweden
<input type="checkbox"/>	Michael@demo.com	Michael	Jones	Michael@demo.com	US
<input type="checkbox"/>	Mike@demo.com	Mike	Helber	Mike@demo.com	C-level, US
<input type="checkbox"/>	Ole@demo.com	Ole	Andersen	Ole@demo.com	Norway
<input type="checkbox"/>	Olof@demo.com	Olof	Svensson	Olof@demo.com	C-level, Sweden
<input type="checkbox"/>	Thomas@demo.com	Thomas			

**Users and recipients for event**

Event:

Available users

- Alexander Schultz (Alexander@demo.com) Germany
- Arnold Smith (Arnold@demo.com) US
- Emma Andersson (Emma@demo.com) Sweden
- Keith Perry (Keith@demo.com) C-level, US
- Maria Sten (Maria@demo.com) Sweden
- Michael Jones (Michael@demo.com) US
- Mike Helber (Mike@demo.com) C-level, US
- Ole Andersen (Ole@demo.com) Norway
- Olof Svensson (Olof@demo.com) C-level, Sweden

Selected recipients for this event

## 6 Data imports and activation

### 6.1 Notification email on data activation

A notification email can now be sent out on completion of manually started data activations which is useful in huge projects with long running activations.

*To get the notification email enter the Notification menu and type in the email address.*

