

Forsta Visualizations January 2022 Release



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1 Introduction

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

If you would like to know more about these features, please contact the support team at dapresysupport@forsta.com and they will be able to assist you.

Best Regards,
Forsta Team

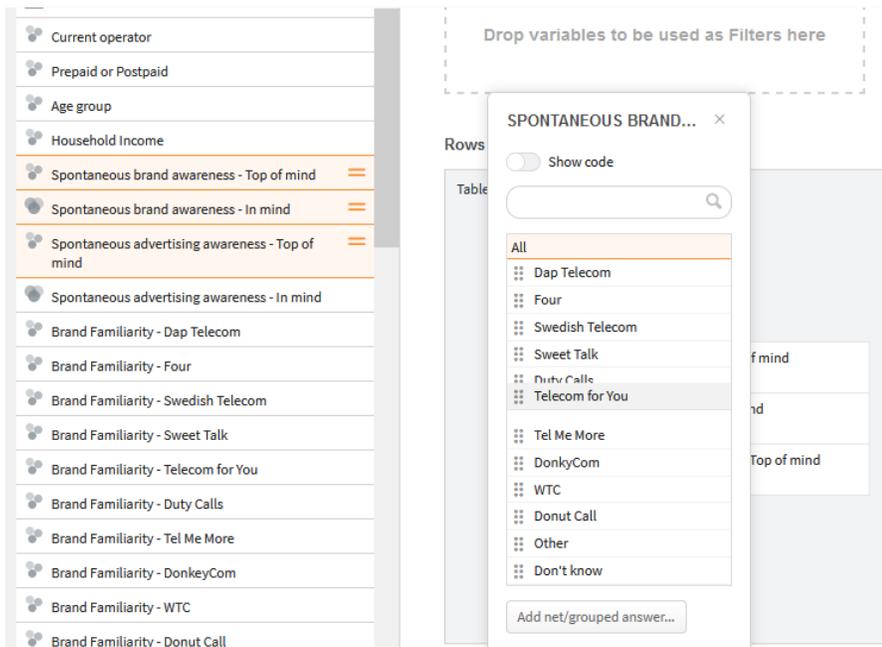
2 Overview

The Forsta Visualizations 2022 January update contains some large improvements, see summary below.

Cross Table tool

- You can now customize the sort order of the answer alternatives shown in the table for a better table production process. Previously the order of the questions could be customized in the Cross Table tool but not the answers, answers had to be reordered at the project level in the answer block page by the Administrator.

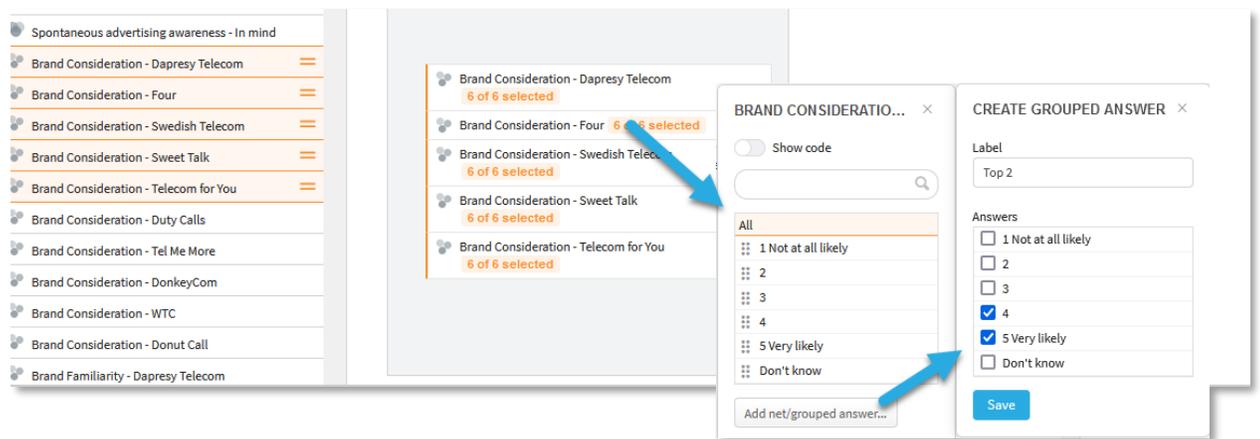
Here drag and drop is used to change the sort order of the answer item “Telecom for you”.



- Grouped answers, such as a “Top 2 box” in a scale question or a combined age group in an Age question, can now be created directly in the Cross Table tool by any user. Previously the grouped answers had to be prepared in the

administration pages by the Administrator, the new ability to create grouped answers directly in the Cross Table tool streamlines the process as less data preparation is needed. A grouped answer created in the Cross Table tool is connected to the sheet the user works in only for highest reporting flexibility, other reports or tables in other Workbooks/sheets are not affected.

Creation of a Top 2 box in a scale answer block.



StoryTeller

- The editable PowerPoint export logic is updated, you can now specify on a chart/table level if the object should be exported as an image even if the user selects an editable (i.e. native) PowerPoint export. By using this new logic custom JavaScript code can now be applied to specific objects, if they are exported as images, even in reports where users can choose editable PPT exports (custom code cannot be applied to objects exported as editable PowerPoint objects).



Project and data administration

- The date filtering logic in the data recoding functionality is updated, any date variable in the project can now be applied as filter to a recoding rule. Previously only the project default date variable could be used as a filter. The new date filtering support is, for example, useful in customer experience surveys where data often contains multiple date variables such as interview date, purchase date, service date etc.
- In the Questions page multiple questions can now be deleted simultaneously for a more efficient process, previously it was supported to delete one question at the time only.

Forsta Plus data integration (formerly Confirmit Horizon)

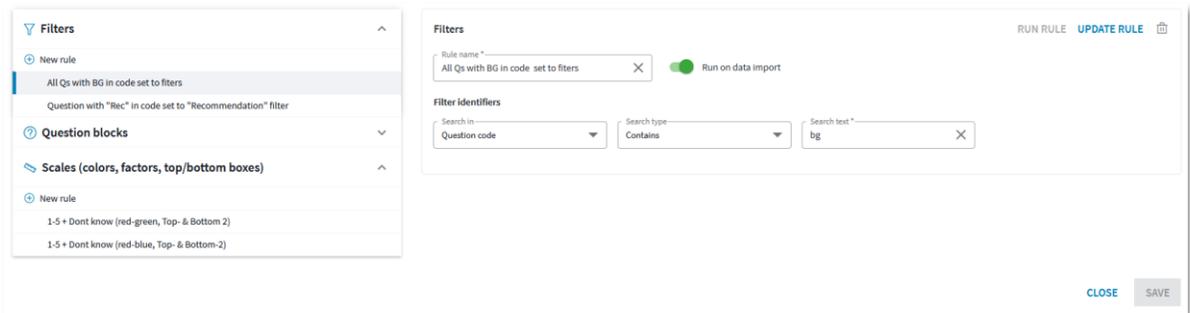
- Text analytics data from the Forsta Genius text analytics tool can now easily be imported to your Forsta Visualizations project when stored in Smart Hub which helps to report on unstructured content such as open ended comments. When setting up the connection to your Forsta survey you simply select if any survey connected text analytics data flow should be imported together with the survey data. Previously the text analytics data could be imported to a Forsta Visualizations project but only when stored in survey data but not when stored in Smart Hub.
- You can now select if the question text or the question title from Survey Designer should be imported to your Forsta Visualizations project. The question title is default in newly created connections as it is usually is a better option for reporting, it's shorter and more distinct, compared to the question text.

Meta data processing template - beta



- A “Meta data processing template” concept has been introduced to improve automation in standardized and repeated projects with similar questionnaires, like for example campaign and product testing. In this first version you can create rules for automating Filter definition, Question block creation and updates to scale answer blocks such as answer colors, factor averages and creation of top and bottom boxes. The new Meta data template is released as a beta version and will be further developed during 2022 to cover automation of more items. To get access now, please contact dapresysupport@forsta.com

An example of a Filter rule, the rule below sets all Questions with “bg” in question code to filters during the data import.



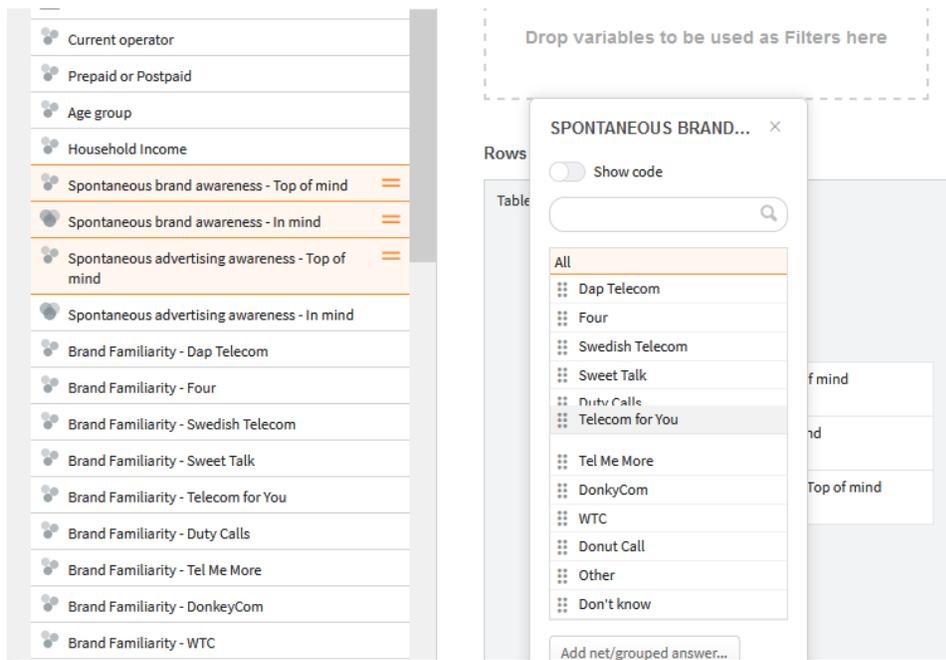
3 Cross Table tool updates

3.1 Customize sort order of answer options

You can now customize the sort order of the answer alternatives shown in the table for a more efficient table production process. Previously the order of the questions could be customized in the Cross Table tool by any user type but not the answers, answers had to be reordered on a project level in the answer block page by the Administrator.

To customize the sort order, go to the Answer selection panel and use drag and drop to set the desired order as shown in the image below. The changes are connected to the current sheet only and do not affect tables in other sheets or other reports.

Here we see how drag and drop is used to change the sort order of “Telecom for you”.



Note, if two, or more, questions share the same answer block an updated sort order is applied to all the questions sharing the answer block.

3.2 Create nets/grouped answers

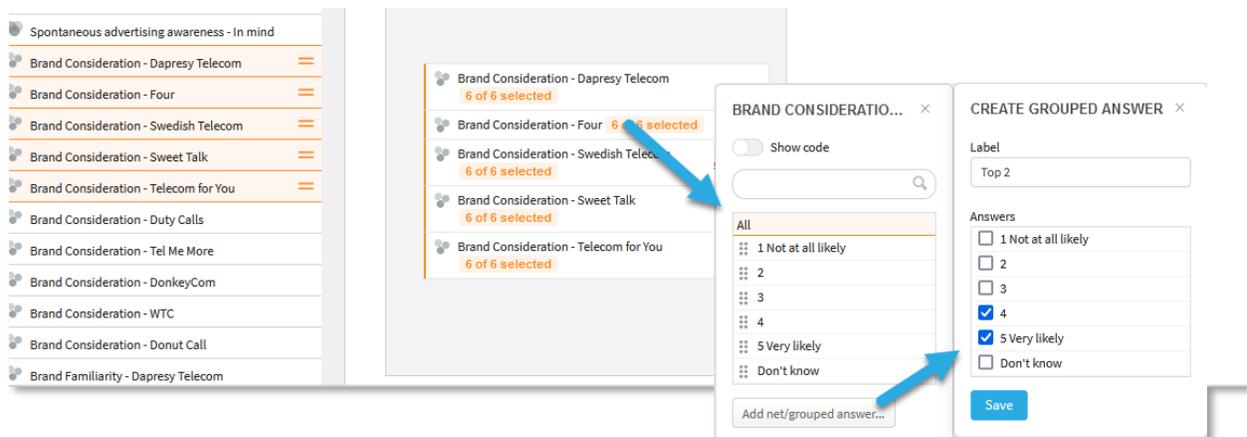
Grouped answers, such as a “Top 2 box” in a scale question or a combined age group in an Age question, can now be created directly in the Cross Table tool by any type of user. Previously, the grouped answers had to be prepared in the administration pages by the Administrator so the new ability to create grouped answers directly in the Cross Table tool streamlines the process as less data preparation is needed.

A grouped answer created in the Cross Table tool is in the sheet the user works in only for highest reporting flexibility, reports or tables in other workbooks/sheets are not affected.

To create a net/grouped answer in the Cross Table tool follow the steps below, see example image further down:

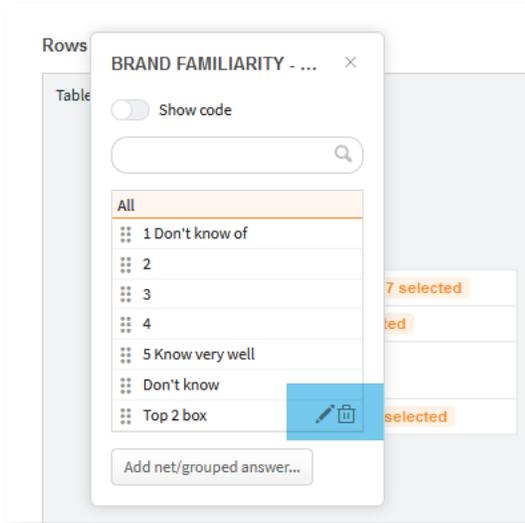
- enter the answer alternative selection panel
- click “Add net/grouped answer...”
- enter the label of the net/grouped answer to be created. The label must be unique, it cannot clash with any other label in the same answer list
- select the answer options to be included
- save

Here we see the creation of a Top 2 box in a scale answer block.



To edit or delete a created grouped answer use the options in highlighted in the image below.

Edit and delete option appears on all created grouped answers.



Note 1, if two, or more, questions share the same answer block the created grouped answer appears in all the questions sharing the answer block.

Note 2, the created grouped answer is connected to the current sheet. If a new sheet is created the grouped answer needs to be recreated unless you copy the sheet where it is located.

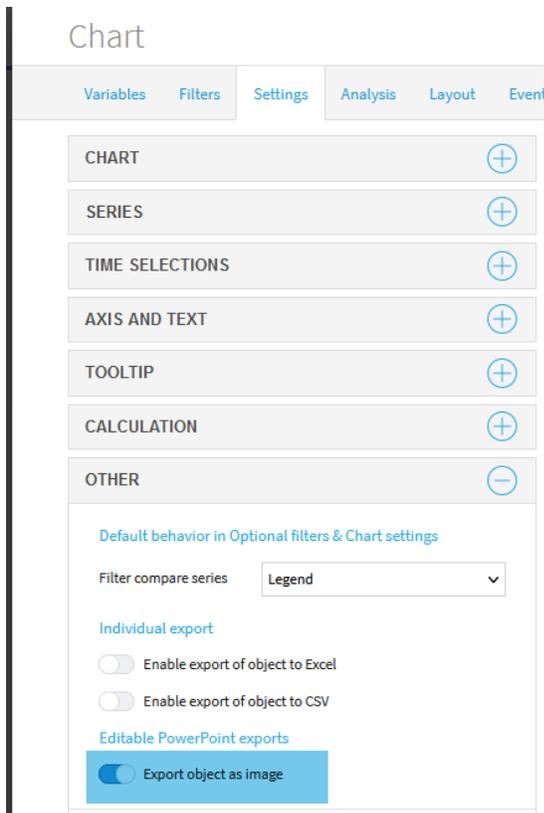
Note 3, grouped answers can be created on all categorical questions, including index questions, except for computed variables created in the Cross Table tool.

4 StoryTeller updates

4.1 Editable PPT export, export specific objects as images

The editable PowerPoint export logic is updated, you can now specify on a chart/table level if the object should be exported as an image even if the user makes an editable PowerPoint export. By using this new logic custom code can now be applied to specific objects, if they are exported as images, even in reports allowing editable PPT exports (custom JavaScript code cannot be applied to objects exported as editable PowerPoint objects).

The new setting, when the toggle is active the object is exported as an image even if the user exports the report in an editable PowerPoint format.





5 Project and data administration updates

5.1 Data recoding, improved date filtering

The date filtering logic in the data recoding functionality is updated, any date variable in the project can now be applied as filter to a recoding rule. Previously the project default date variable could be used as filter only. The new date filtering support is for example useful in customer experience surveys where data often contains multiple date variables such as interview date, purchase date, service date etc.

The highlighted control below is used to apply Filters to a recoding rule. All imported date variable is now shown in this control.

Create Recoding rule

OLD VALUE (ORIGINAL VALUE)
"1"

Null (Missing value)
 All values excluding Null values

NEW VALUE (VALUE AFTER RECODING)

Null (Missing value)

FILTER
Service date

Range

From
2022-01-03

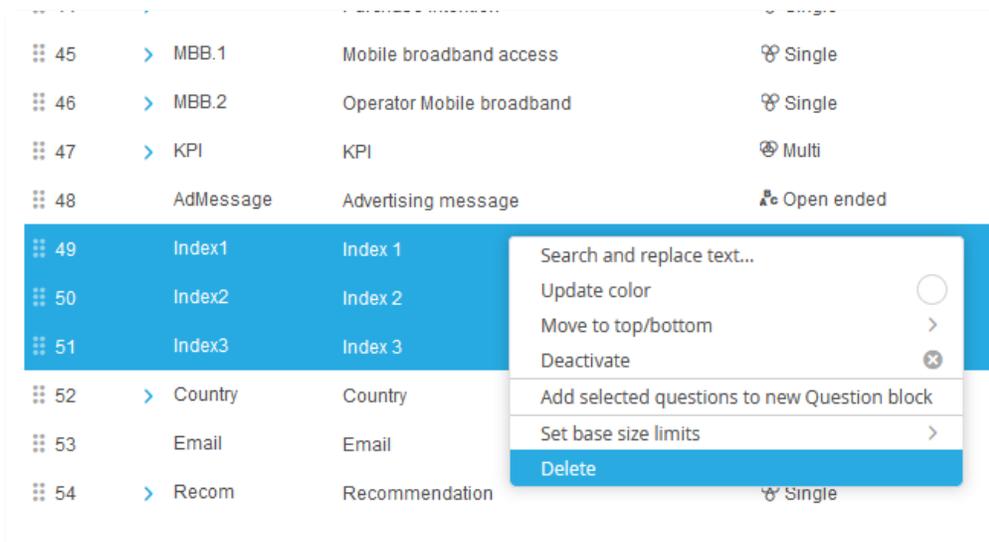
Through
2022-01-31

5.2 Bulk delete questions

In the Questions page multiple questions can now be deleted simultaneously for a more efficient process, previously it was supported to delete one question at the time only.

To delete multiple questions, select the question to be deleted and use the “Delete” option in the context menu appearing on right click as shown below.

Example of bulk deletion, all selected questions get deleted when the Delete option in context menu is used.





6 Meta data processing template - beta

A “Meta data processing template” concept has been introduced to improve automation in standardized and repeated projects with similar questionnaires, like for example campaign and product testing. In this first version you can create rules for automating Filter definition, Question block creation and updates to scale answer blocks such as answer colors, factor averages and creation of grouped answers (top and bottom boxes).

The new Meta data template function is released as a beta version and will be further developed during 2022 to cover automation of more items. To get access now, please contact dapresysupport@forsta.com.

6.1 Functionality overview

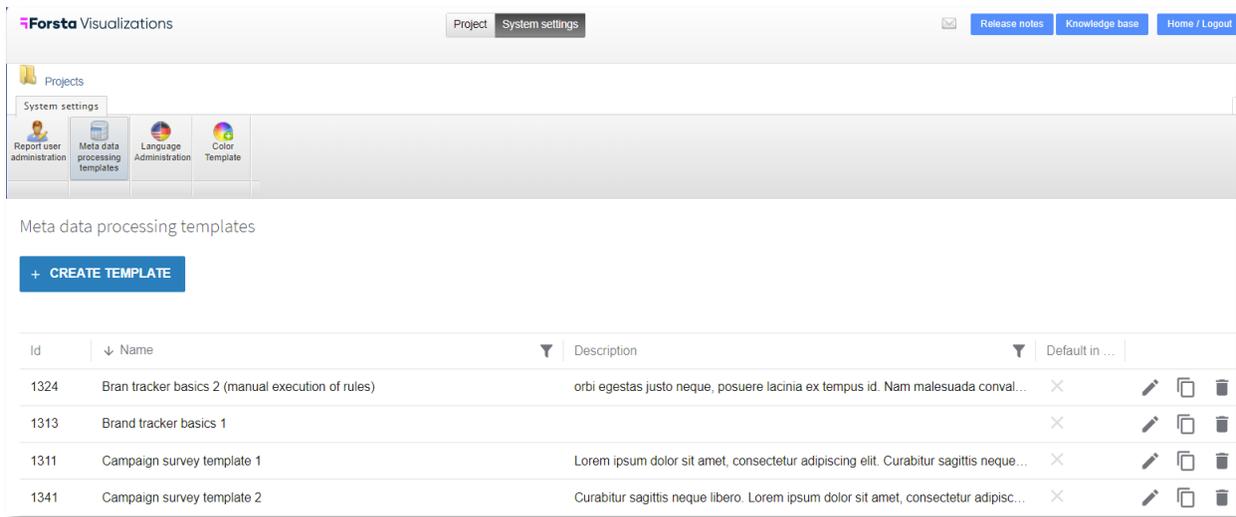
Below is summary of the Meta data processing template functionality.

- The Meta data processing templates are created on a system level, not on project level, as a template can be used in multiple projects.
- A template consists of one or many rules for automating Filter definition, Question block creation and/or Scale settings update.
- A template is either assigned to a project during project creation or later in the setup process by importing a template to the project.
- The rules in a template can be executed automatically during data import or manually executed from the Questions page.
- The template can be edited inside the project, rules can be edited and new rules added. Edits inside the project will not affect the library or other projects using the same template.

6.2 Create Meta data processing template

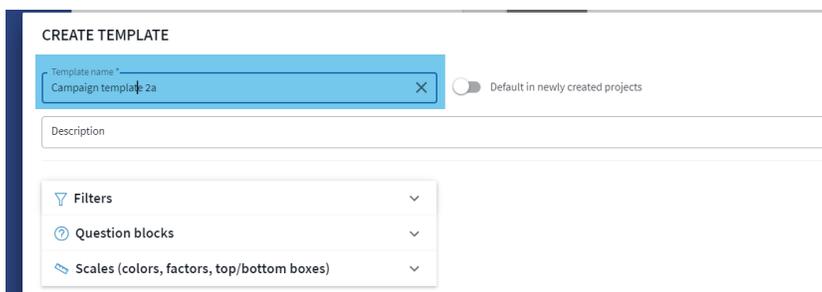
The new Meta data template library is located inside the System settings section, next to the Color templates page, as shown below. The page lists all your created templates and from this view new templates are created and the existing can be edited, copied and deleted.

Here we see the template main screen, the grid lists all your templates.

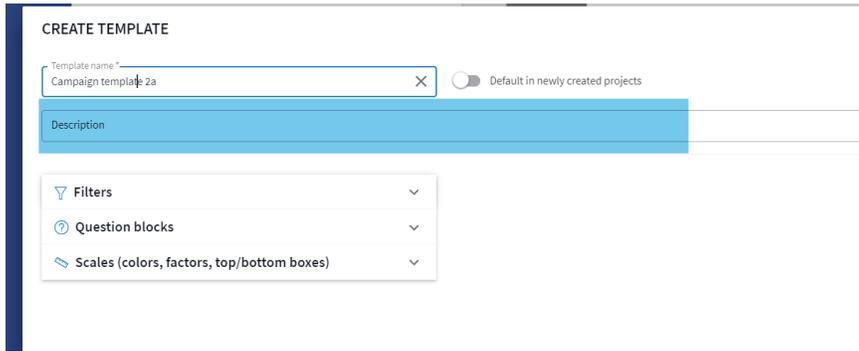


To create a new template, click the “Create template” button in top left corner, then:

- Enter the template name.

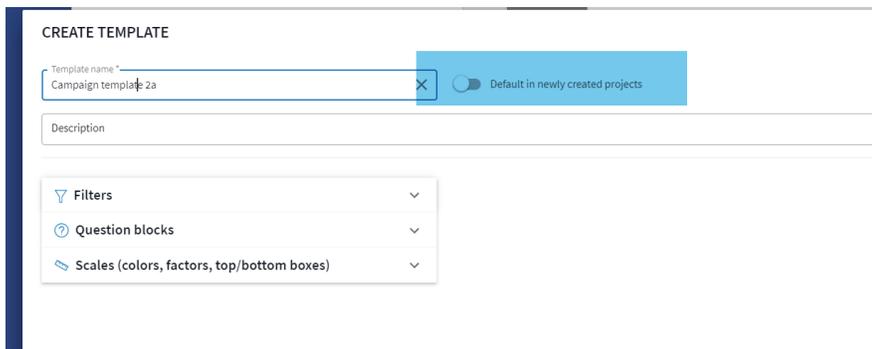


- Enter a template description (optional).



The screenshot shows the 'CREATE TEMPLATE' interface. At the top, there is a 'Template name' field containing 'Campaign template 2a' and a toggle switch for 'Default in newly created projects'. Below this is a 'Description' field, which is highlighted with a blue background. Underneath the description field are three expandable sections: 'Filters', 'Question blocks', and 'Scales (colors, factors, top/bottom boxes)', each with a downward arrow.

- Specify if the template should be assigned to newly created projects by default or not. Only one template can be marked as “default in newly created projects”, see more information about assigning a template to a project in chapter 6.4.



This screenshot is similar to the previous one, showing the 'CREATE TEMPLATE' form. In this view, the 'Default in newly created projects' toggle switch is highlighted with a blue background. The 'Description' field is now empty. The 'Filters', 'Question blocks', and 'Scales' sections remain visible below.

- As a next step, define the rules, see details for creating Filter, Question block and Scale rules below.

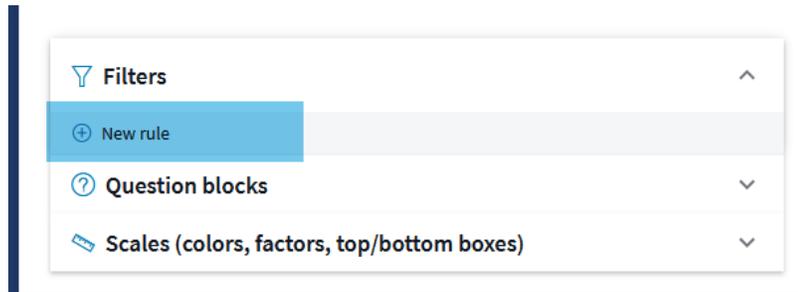
Filter rules

Filter rules are used to mark questions as filters. The question text or question code is used to identify the questions to be set as filters.

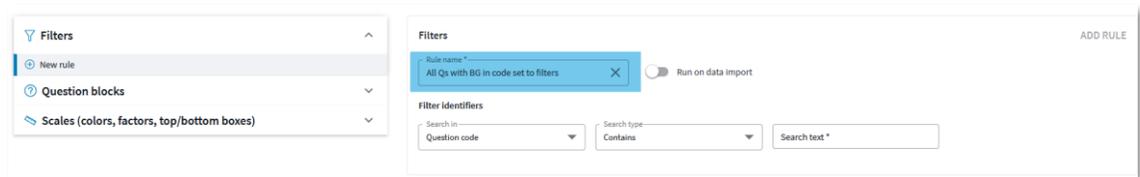
To create a Filter rule follow these steps:



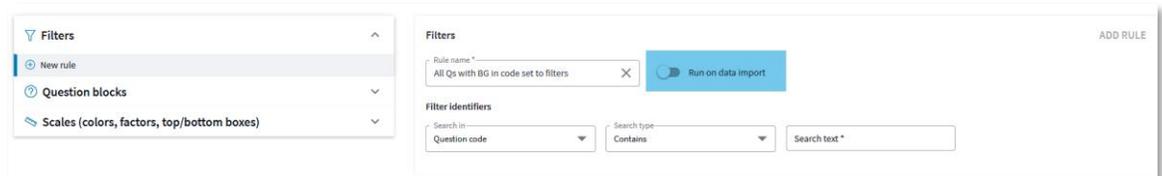
- Click "New rule" in Filter section.



- Enter the name of the rule.



- Specify if the rule should be executed during data import, a rule can always be run manually from the Questions page inside the project (see more info in chapter 6.4). When the rule is run during data import it is applied to newly imported questions in every data import.



- Specify how to identify the questions to be set as filters by entering the search criteria. The questions matching the search criteria are set as Filters when rule is executed.



- Click Add rule

- The created rule is now added to the list of Filter rules.

Example 1, this rule sets all questions with “bg” in the question code to Filters when it is executed.



Example 2, this rule sets the question with code "Rec" to Filter when it is executed. As only one question can fulfil an "Exact match" criteria the Filter text can also be defined, see the text input filed to the most right.

Question block rules

Question block rules are used to create Question blocks. The question text or question code is used to identify the questions to be grouped to a Question block.

To create a Question block rule follow the steps below:

- Click "New rule" in Question block section.

- Enter the name of the rule.



- Specify if the rule should be executed during data import or not, see more info about rule execution in chapter 6.4.

Filters

- Question blocks
- New rule
- Scales (colors, factors, top/bottom boxes)

Question blocks

Rule name *
Consideration

Run on data import

Question identifiers

Search in: Question code | Search type: Contains | Search text: con | Question block name

Question types

Apply to categorical questions | Apply to numeric questions | Apply to open ended questions | Apply to date questions

- Specify how to identify the questions to be included in the Question block.

Filters

- Question blocks
- New rule
- Scales (colors, factors, top/bottom boxes)

Question blocks

Rule name *
Consideration

Run on data import

Question identifiers

Search in: Question code | Search type: Contains | Search text: con | Question block name

Question types

Apply to categorical questions | Apply to numeric questions | Apply to open ended questions | Apply to date questions

- Enter the name of the Question block to be created.

Filters

- Question blocks
- New rule
- Scales (colors, factors, top/bottom boxes)

Question blocks

Rule name *
Consideration

Run on data import

Question identifiers

Search in: Question code | Search type: Contains | Search text: con | Question block name: Consideration

Question types

Apply to categorical questions | Apply to numeric questions | Apply to open ended questions | Apply to date questions

- Select which of the question types the rule should be applied to.



- Click Add rule

- The created rule is now added to list of Question block rules as shown below.

Example, the rule below creates a Consideration question block, all categorical question with “con” in the question code will be included

Scale rules

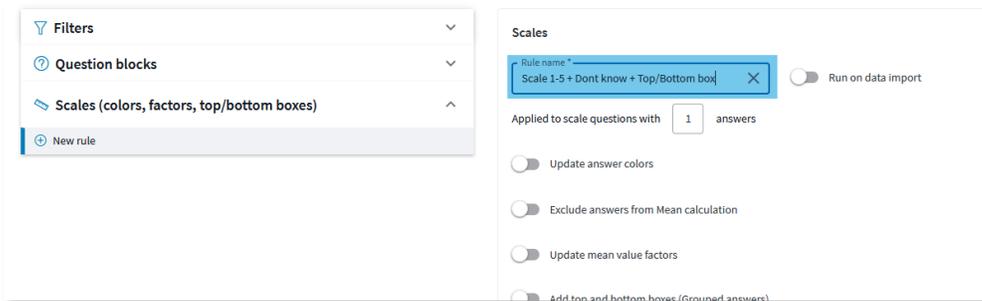
The purpose of Scale rules is to update Answer block settings of scale questions, the following updates can be made by applying a scale rule to an Answer block.

- update the answer colors
- define answers to be excluded from mean value calculation
- update the mean value factors
- creation of grouped answer such as for example a Top 2 box and Bottom 2 boxes.

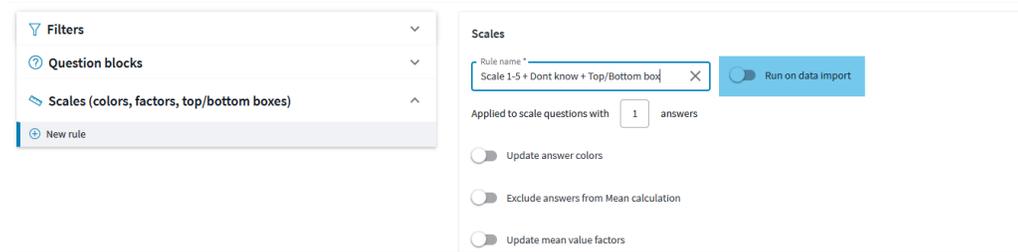
To create a Scale rule follow the steps below:

- Click “New rule” in Scale section.

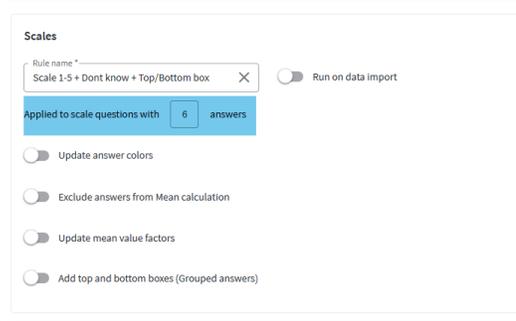
- Enter the name of the rule.



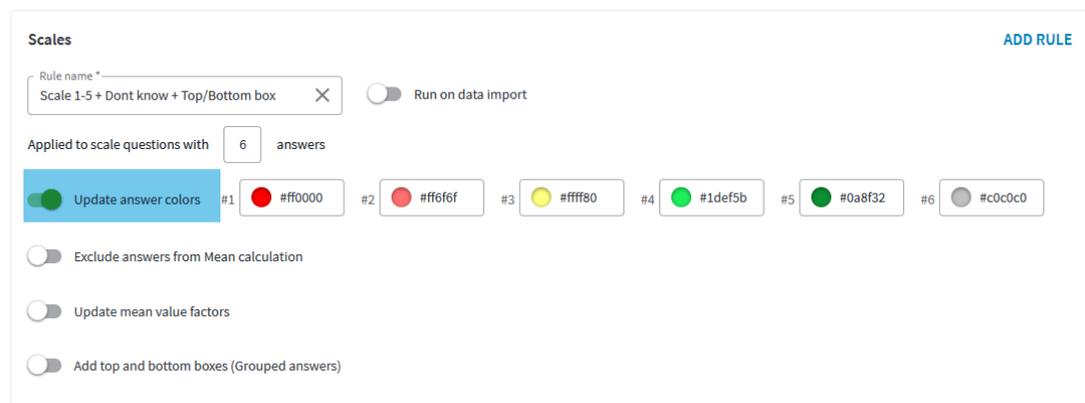
- Specify if the rule should be executed during data import or not (only applicable to surveys imported from Survey Designer in Forsta Plus, (formerly Confirmit Horizon), and surveys imported via the import API, see more info in chapter 6.4.1)



- Enter the number of "scale" answer options the rule is valid for. Example, if six is entered the rule can be applied to scale answer blocks with six answer options which could be a 1-6 or 1-5+ Don't know or any other combination with six answers.



- If answer colors should be updated activate the “Update answer colors” option and specify the colors of each option The # in front of the colors refers to the sort order in the answer block and not the answer ids.



- If any answer should be excluded from the mean value calculation activate the option highlighted below. Select the answer(s) to be excluded in the dropdown list. The # in the answer list refers to the sort order in the answer block and not the answer ids.



Scales ADD RULE

Rule name *
Scale 1-5 + Dont know + Top/Bottom box ✕ Run on data import

Applied to scale questions with answers

Update answer colors #1 #2 #3 #4 #5 #6

Exclude answers from Mean calculation Answer #6 ✕

Update mean value factors

Add top and bottom boxes (Grouped answers)

- If mean value factors should be updated, activate the “Update mean value factors” option and define the range, like for example 1-10, 0 -100 or -100 -100. When rule is executed, the system assigns the relevant factor to each answer based on the defined range and the number of answers included in the mean value calculation. In the example below the system will assign 0, 25, 50, 75 and 100 as there are five answer options included in the mean value calculation and range is 0-100.

Scales ADD RULE

Rule name *
Scale 1-5 + Dont know + Top/Bottom box ✕ Run on data import

Applied to scale questions with answers

Update answer colors #1 #2 #3 #4 #5 #6

Exclude answers from Mean calculation Answer #6 ✕

Update mean value factors to

Add top and bottom boxes (Grouped answers)



- If any grouped answers, such as Top 2 box or a Bottom 2 box, should be added to the answer block activate the option "Add top and bottom boxes". For each of the created grouped answers define the answers to be grouped (the # in the dropdown list refers to the sort order in the answer block and not the ids), the label, the color and the position in the answer block.

Scales ADD RULE

Rule name *
Scale 1-5 + Dont know + Top/Bottom box Run on data import

Applied to scale questions with answers

Update answer colors #1 ● #ff0000 #2 ● #ff66ff #3 ● #ffff80 #4 ● #1def5b #5 ● #0a8f32 #6 ● #c0c0c0

Exclude answers from Mean calculation Answer #6

Update mean value factors to

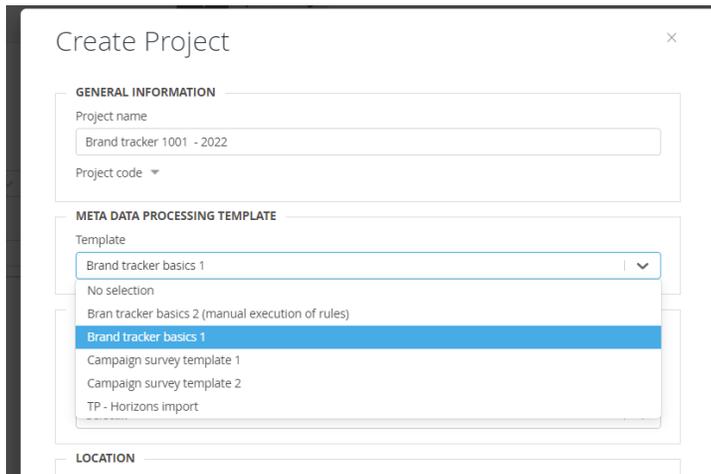
Add top and bottom boxes (Grouped answers)

Answer	Label	Color	Position
Answer #1 Answer #2	Bottom 2	● #ff0000	<input type="text" value="6"/>
Answer #5 Answer #4	Top 2	● #008000	<input type="text" value="7"/>

6.3 Add templates to project

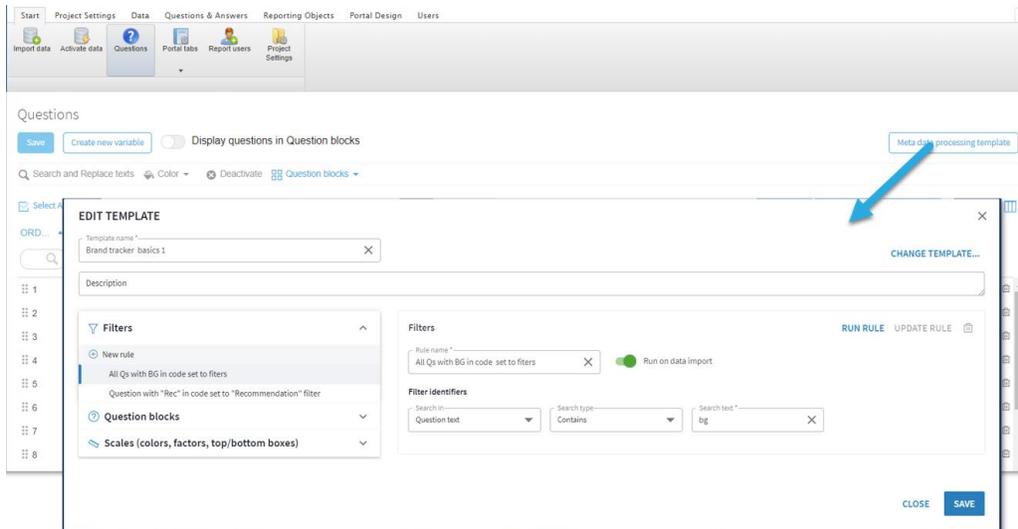
A Meta data processing template can be added to a project during project creation or later in the process from the Questions page. If wrong template has been added to a project you can at any point in time import a new template which replaces the current one. Each project can contain one template only.

Here we see how to assign a Meta data processing template to a project during project creation. The new control for selecting template is shown if any template exists. If a template has been set to “Default selected in newly created projects” it will be default selected in this control (see chapter 6.2 for how to set a template to be default selected in newly created projects).

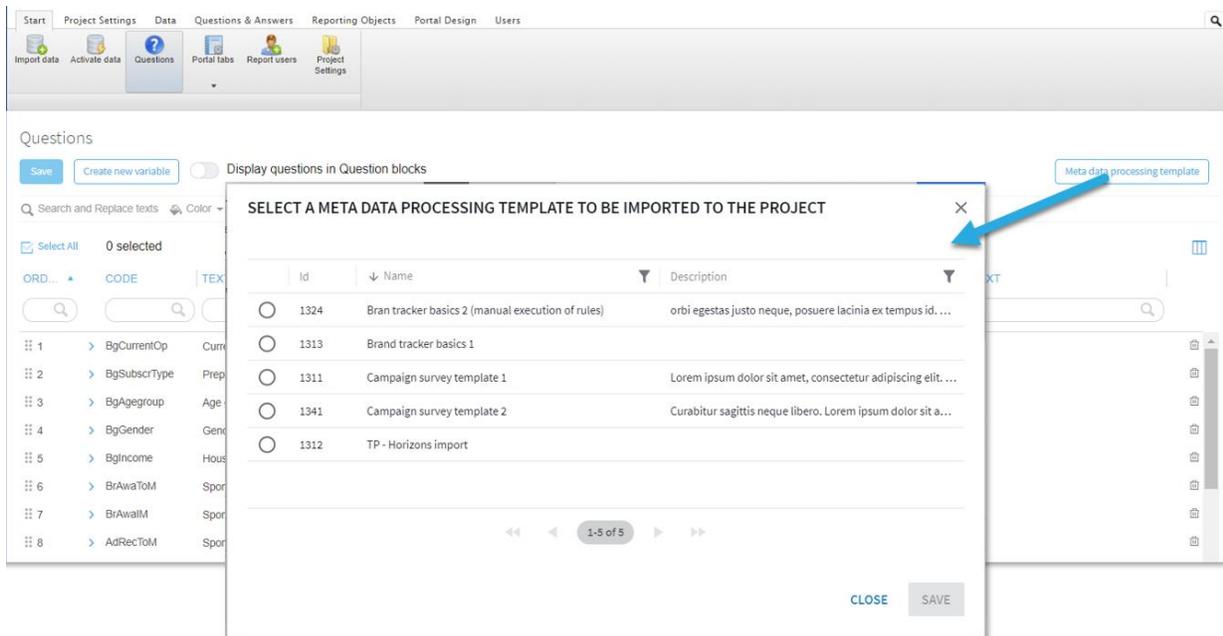


After a template has been assigned to project you can view and edit the template from the Questions page as shown below.

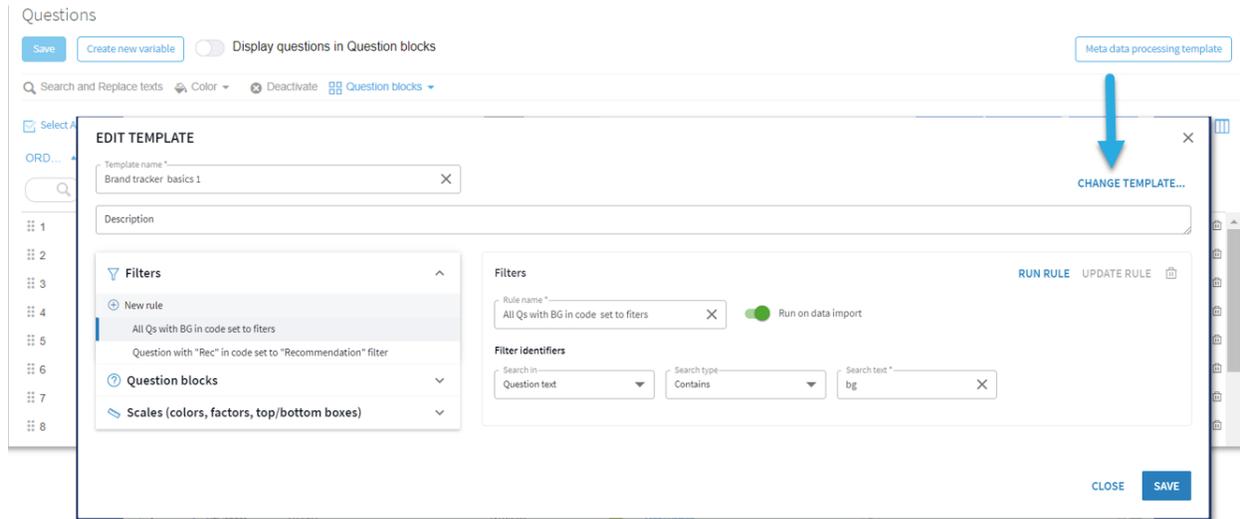
Growing Smarter Together



If no template was added to the project during project creation you can import a template from the questions page as shown below.



To change template in the project use the “Change template” option shown below.



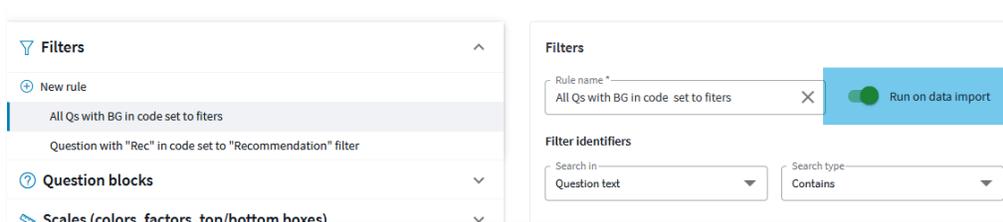
6.4 Execute rules

The template rules can be executed during data import or manually from the data page.

6.4.1 Execute rules automatically during data import

All the rules defined to be run on data import are executed during both manual data imports and scheduled data imports. The rules are applied to newly imported questions meaning it is applied to all the questions in the first data import but only to new questions in subsequent data imports.

Rules with this toggle active are run on data import.



Note 1, in this first version of the Meta data processing template functionality there is no information message after the data import showing which questions were set to Filters, which Question blocks were created etc. Go to Questions page to see the created Filters, Question blocks and updated scale settings.

Note 2: scale rules can only be executed the data import API is used (EG when importing from Forsta Plus using the V3 integration) as this sets scale questions during the import. In other use cases, such as uploading data via an SPSS file, the questions are identified as scales by the user in the Questions page so scale rules cannot be executed during the data import.

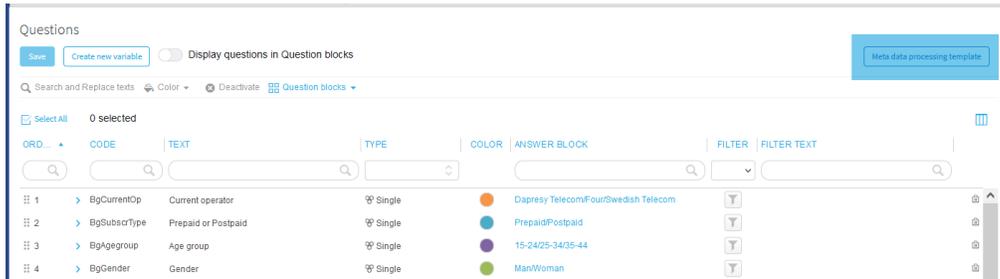
6.4.2 Execute rules manually

Filter and Question block rules are, in the first version, executed from the Template view while Scale rules are executed from the Answer block view.

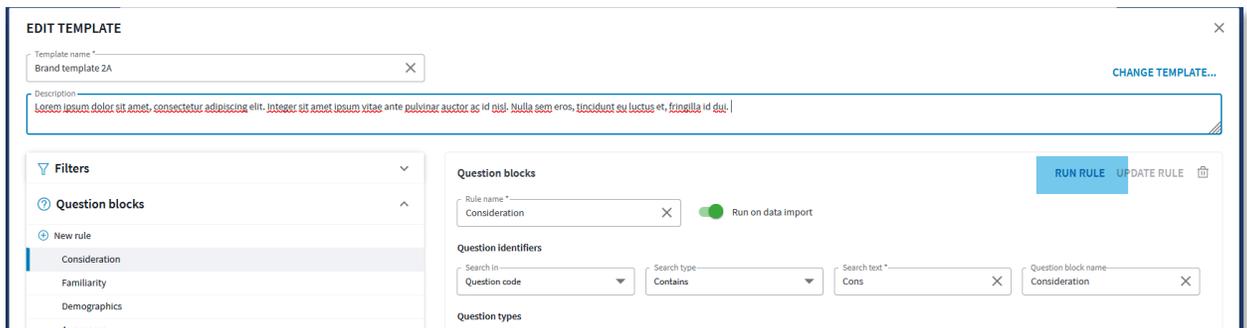
To execute Filter and Question block rules manually follow the steps below:



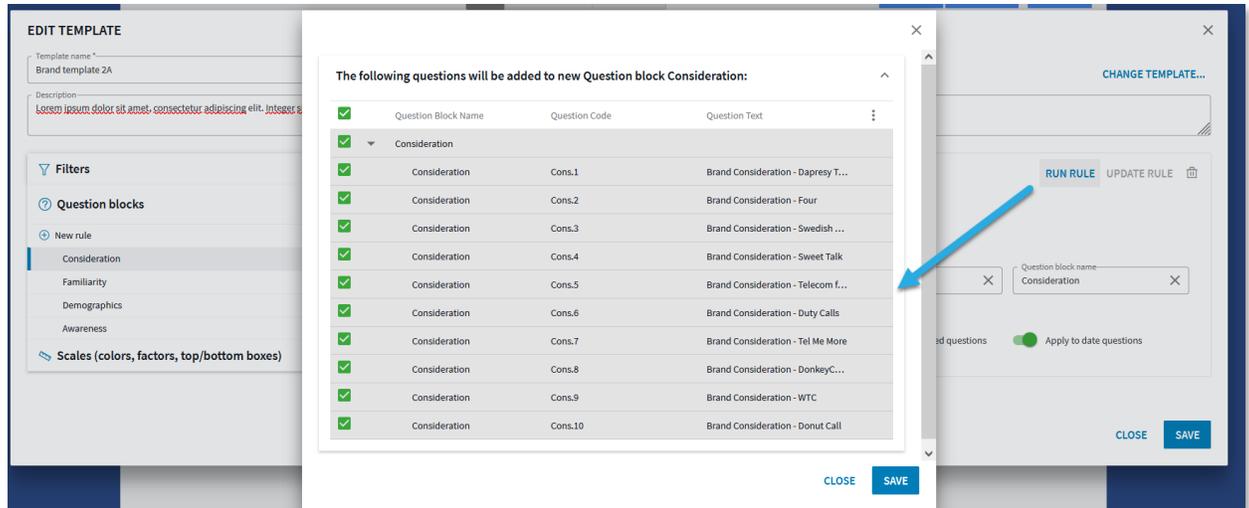
- In Questions page open the Meta data Template



- Select the rule to be executed (only a single rule can be run at the time, running multiple rules simultaneously will be added in next version)
- Click Run Rule in top right corner



- An confirmation dialogue shows the result of the executed rule, below is an example of an executed Filter rule. If any of these questions should not be set to a Filter untick the question. To finalize the execution of the rule click Save.



To execute Scale rules follow the steps below:

- Go to Questions page and open an Answer block connected to scale questions
- In the answer block view all the matching Scale rules are shown in the top toolbar (the rule must be based on same amount of answers as the current Answer block to be shown in the list of available rules). In the example below two Scale rules matches the current Answer block as both are based on six answers.



Answer Block 1 Not at all likely/2/3

Cons.1 - Brand Consideration - Dapresy Telecom

Save Create grouped answer Apply scale rules Apply Color Template View questions connected to this Answer block

Select All Search and Replace 1-5 + Dont know (red-green, Top- & Bottom 2) Value sorting Neg/Neu/Pos Answer color Sort Answers

ORDER	ANSWER TEXT	ID	COLOR	EXCLUDE AVERAGE	FACTOR AVERAGE	EXCLUDE FROM PERCENTAGE	VALUE SORTING
1	1 Not at all likely	1	Orange	<input type="checkbox"/>	1	<input type="checkbox"/>	Sortable group 1
2	2	2	Teal	<input type="checkbox"/>	2	<input type="checkbox"/>	Sortable group 1
3	3	3	Purple	<input type="checkbox"/>	3	<input type="checkbox"/>	Sortable group 1
4	4	4	Green	<input type="checkbox"/>	4	<input type="checkbox"/>	Sortable group 1
5	5 Very likely	5	Red	<input type="checkbox"/>	5	<input type="checkbox"/>	Sortable group 1
6	Don't know	6	Blue	<input type="checkbox"/>	6	<input type="checkbox"/>	Sortable group 1

- Select the rule to be run. A preview of the result is shown, Save or Discard the result in order to continue.

Answer Block 1 Not at all likely/2/3

Cons.1 - Brand Consideration - Dapresy Telecom

Save Create grouped answer Discard Applied Scale Rule Apply Color Template View questions connected to this Answer block

Select Search and Replace text Exclude Average Value sorting Neg/Neu/Pos Answer color Sort Answers

ORDER	ANSWER TEXT	ID	COLOR	EXCLUDE AVERAGE	FACTOR AVERAGE	EXCLUDE FROM PERCENTAGE	VALUE SORTING
1	1 Not at all likely	1	Red	<input type="checkbox"/>	0	<input type="checkbox"/>	Sortable group 1
2	2	2	Light Red	<input type="checkbox"/>	25	<input type="checkbox"/>	Sortable group 1
3	3	3	Yellow	<input type="checkbox"/>	50	<input type="checkbox"/>	Sortable group 1
4	4	4	Light Green	<input type="checkbox"/>	75	<input type="checkbox"/>	Sortable group 1
5	5 Very likely	5	Green	<input type="checkbox"/>	100	<input type="checkbox"/>	Sortable group 1
6	> Bottom 2	6	Red	<input checked="" type="checkbox"/>		<input type="checkbox"/>	Sortable group 1
7	> Top 2	7	Green	<input checked="" type="checkbox"/>		<input type="checkbox"/>	Sortable group 1
8	Don't know	6	Grey	<input checked="" type="checkbox"/>		<input type="checkbox"/>	Sortable group 1