Growing Smarter Together



Forsta Visualizations July 2022 Release

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page 1



Table of Contents

Forsta Visualizations July 2022 Release	1
1 Introduction	3
2 Overview	4
3 Overall Calculations	6
3.1 Rebasing for percentages calculations	6
3.2 Analytics – Dependent Paired Z and T test	11
4 StoryTeller	14
4.2 Improved StoryTeller Template Library	14
4.3 Improved filter information in Excel export	17
5 StoryCreator	18
5.1 Export, Swap and "turn off" tooltips button updates	18
6 Data management	19
6.1 Tag support on answers	19
6.2 Improvements Tag on Questions	20

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1 Introduction

This document describes the new and improved features in the Forsta Visualizations 2022 July 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 July update contains some great improvements, see the summary below.

Overall Calculations

- In many reporting situations it can be required to change the base size of a calculation for questions to show the desired values. As an example, this could be in a brand funnel where the base should include all respondents, instead of only the respondents that have answered the question. Until now this has needed a compute. With this release we have implemented "Rebasing" within the object/table itself. Options to choose from is "Selected question", "Total in filter combination" and "From other question".
- In this release Paired Z and T tests have been added to our CrossTable Tool. In upcoming releases this will also be added to our StoryTeller and StoryCreator. This test is most used when comparing the same set of respondents over time or different products. The test will only include the respondents that exist in both samples. If a respondent only exists in one sample, it will be excludedfrom the test.

<u>StoryTeller</u>

• In the latest update of Forsta Visualizations the StoryTeller Templates have been improved to also store original question codes and answer ID's. This means that if the saved question and answer code(s) already exist in the project it is being added to, the object/s will be populated with data settings directly.



• When a StoryTeller report is exported to Excel, there is a "Filters" sheet showing which optional filters were selected when the export was executed. This page has now been updated to also include Hierarchical filter, Variable Subset and Time Period.

StoryCreator

• To improve the workflow within StoryCreator, some buttons and features have been positioned to more logical locations. The direct export per object (png and excel) have been moved into the toolbar on the right side, the swap button has had a facelift and the option to turn off tooltips has been placed in the right click context menu.

Data management

- Just as questions can be tagged to improve question administration, answers can now also be tagged. The tags are, in the initial version, used to search for answers more efficiently in the Answer block page but later the tags will be supported in more administration pages and in report setup for better support for automated processes. The answer tags are editable by the administrator within the application or can be amended by the "Download/Upload meta data" function.
- Some smaller adjustments have been implemented for the Question Tags. Tags can now be added on multiple questions at the same time and acceptable separators for Tags in "Download/Upload meta data" are "," and ";".



3 Overall Calculations

3.1 Rebasing for percentages calculations

As described earlier, in many reporting situations it's a requirement to change the base size of a calculation for questions to show the values required. As an example, it could be in brand funnels where the base should include all respondents, instead of only the respondents that have answered each question. Previously this has required the creation of a Compute. With this release we have implemented "Rebasing" within the object/table itself. Options to choose from are "From shown question", "Total in project and filter combination" and "From other question". By default, all objects have "Selected question" selected, and this option is the same calculation as the previous calculation. The option to rebase is available in StoryTeller, StoryCreator and CrossTable tool.

NOTE!

Index questions cannot be used with rebasing, neither as "shown question" or as "Other question". If an index is selected, all rebase options are greyed out.

3.1.1 Calculation logic

3.1.1.1 From shown question

This option is the current logic and will use the number of respondents that have answered on the selected question as denominator in the % calculation.

3.1.1.2 Total in project and filter combination / Total in filter combination within loop

This option will look at the total number of respondents activated in the project and together with additional filters create the number of respondents that will be used as denominator in the % calculation. If a looped question is used, all responses within the loop will be used as "total".

3.1.1.3 From other question

This option will look at an another questions number of respondents and together with additional filters create the number of respondents that will be used as denominator in the % calculation.



3.1.1.4 Restrictions for Looped data

When looped data is used, there are some restrictions regarding the new feature. If a looped question is selected as the main question, and;

- 1. Base in looped calculation is using "Looped responses", only "From shown question" and "Total in filter combination within the loop" is available.
- 2. Base in looped calculation is using "Respondents", all rebasing options are available, but only questions from the main data files can be used as base option.

3.1.2 How to enable it?

3.1.2.1 StoryTeller

The option to rebase an % calculation can be used within charts and tables. In both object types the new setting can be found on the Variable tab, underneath the answer selection under the header "Base Calculation".

H	ere	2 V	ve	se	е	the	new	optic	ons	in	а	Sto	ryī	Tell	er	obj	ect	•
	Variables	Filten	Settings	Analysis	Layout	Events												

FILTERING	PREVIEW		
Percentage share-Categorical questions v	AXIS AND LEGEND		
SELECTION	1.00		
Questions	i e Interval (Full period)		Y
	II Question (Likely to recommend)		
Spontaneous advertising awareness - In mind Where seen advertising - Daprezy Telecom			
Likely to switch operator Resson likely to switch	Event and drop between e		
Likely to recommend Purchase intention			
Mobile broadband access Operator Mobile broadband	Legend	BASE CALCULATION	
khi brand	🗄 👴 Answer (5 Very likely)		
Aranes		Base in percentage calculation (i)	
G Stowcode		\sim	
-Ad- 1 Net at all Herly		From shown question	
8			
4 s Very Skely		Total in project and filter combination	
Deritknow		Totat in project and inter combination	
~		Com ather such as	
		From other question	
Base calculation			
Total in project and filter combination			
From other question			

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3.1.2.2 StoryCreator

To be able to use rebasing the setting needs to be enabled in the report. To allow rebasing in the report, enable it under Setup and Calculation Types, on the row for "% - Categorical questions". This option is by default enabled in new reports.

HIERARCHICAL FILTERS					\oplus
QUESTIONS					\oplus
CALCULATION TYPES					Θ
	Default No of decimals		Default unit text		
✓ % - Categorical questions	1	~		Allow Rebase	1
Mean - Categorical questions	1	~			
Count - Categorical questions	1	~			

Here we see how to enable it under Setup.

The option to rebase an % calculation can be used within charts and tables. In both object types the new setting can be found on the Question tab, underneath the option to select what type of calculation to do, under the header "Base in percentage calculation".



Here we see the new options within StoryCreator.

Questions	Time selections			-14	Setup	53
SHOW RESULT AS	QUE STION S	Show code	ANSWERS		Show cod	de
Categorical Numerical		Q)			Q,	
Percentage share	Clear all ×		Clear all ×			
Mean	% - Gender	^	All			
Count	% - Household Income		1 Not at all likely			
Correlation Analysis	99 - Spontaneous brand awareness - Top of mind		2			
Base in percentage calculation (i)	③ - Spontaneous brand awareness - In mind So - Spontaneous advertising awareness - Top of mind		3			
From shown question	Spontaneous advertising awareness - In mind		5 Very likely			
Total in project and filter combination	Where seen advertising - Dapresy Telecom		Don't know			
From other question	S - Likely to switch operator					
	@ - Reason likely to switch					
	S - Likely to recommend					
	🖘 - Purchase intention					
	9 - Mobile broadband access	~				

3.1.2.3 CrossTable tool

To be able to use rebasing the setting needs to be enabled in the report. To allow rebasing in the report, enable it under Settings and Calculation Types, on the row for "% - Categorical questions". This option is by default enabled in new reports.

Here we see how to enable it under Setting.

HIERARCHICAL FILTERS					\oplus
QUESTIONS					\oplus
CALCULATION TYPES					Θ
	Default No of	decimals	Default unit text		
✓ % - Categorical questions	1	~		Suffix 🗸	Allow Rebase
Mean - Categorical questions	1	~		Suffix 🗸	
Count - Categorical questions	1	~	ſ	Suffix 🗸	

The option to rebase an % calculation can be found on the Calculation tab, underneath the answer selection under the header "Base in percentage calculation".



Here we see the new options within CrossTable tool.

-		M	
STANDARD CALCULATIONS			
C Use weight	Neget	~	
Categorical calculations Number of decimals Unit Proceedings share Number of decimals Unit Proceedings share Number of decimals Unit Number of decimals Unit	Softer v	ofy pea/weg, chares	Base in percentage calculation (i)
C Court			From shown question
Construction of personalized canonication Construction Total in project and filter containation From other question			Total in project and filter combination
RASE SIZE OPTIONS			
SIGNIFICANCE TESTING			Erom other question
BENCHMARK			
RANK			
CORRELATION AMALY 515			
COMPUTE VARIABLES			



3.2 Analytics – Dependent Paired Z and T test

In this release Paired Z and T tests have been added to our CrossTable Tool. In upcoming releases this will also be added to our StoryTeller and StoryCreator. This test is most used when comparing the same set of respondents over time or assorted products. The test will only include the respondents that exists in both samples. If a respondent only exists in one sample, it will be removed from the test completely, but still be shown in the main object.

All other options and functionalities that can be used for the "Two independent samples" test can be applied.

3.2.1 Calculation logic Dependent T-test

Both the mean and percentages T-test will be compared against the same critical value from the t-table as the "Two independent samples T-Test" that.

3.2.1.1 Categorical mean calculation

$$t = \frac{d}{\frac{S_d}{\sqrt{n}}}$$
$$s_d = \sqrt{\frac{\sum_{i=1}^n (d_1 - \bar{d})^2}{n - 1}}$$
$$\bar{x}_1 - \bar{x}_2 = \bar{d} = \frac{\sum_{i=1}^n d_i}{n}$$

Where d is the difference between the same respondent in the two samples and \overline{d} is the mean of all differences, and the degrees of freedom is n-1

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3.2.1.2 Percentage calculation

$$t = \frac{(p_1 - p_2) - 0}{\sqrt{\hat{p}(1 - \hat{p})(\frac{1}{n_1} + \frac{1}{n_2})}}$$

Where \hat{p} is calculates like this:

$$\hat{p} = \frac{(p_1 * n_1 + p_2 * n_2)}{n_1 + n_2}$$

And the degrees of freedom is n-1

3.2.2 Calculation logic Dependent Z-test

Both the mean and percentages Z-test will be compared against the same critical value as the "Two independent samples Z-Test" already does.

Significant level 10% = 1,644853627

Significant level 5%= 1,959963985

Significant level 1%= 2,575829304

3.2.2.1 Categorical mean calculation

$$z = \frac{d}{\frac{S_d}{\sqrt{n}}}$$
$$s_d = \sqrt{\frac{\sum_{i=1}^n (d_1 - \bar{d})^2}{n - 1}}$$
$$\bar{x}_1 - \bar{x}_2 = \bar{d} = \frac{\sum_{i=1}^n d_i}{n}$$

Where *d* is the difference between the same respondent in the two samples and \overline{d} is the mean of all differences.

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page 12

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3.2.2.2 Percentage calculation

$$z = \frac{(p_1 - p_2) - 0}{\sqrt{\hat{p}(1 - \hat{p})(\frac{1}{n_1} + \frac{1}{n_2})}}$$

Where \hat{p} is calculated like this:

$$\hat{p} = \frac{(p_1 * n_1 + p_2 * n_2)}{n_1 + n_2}$$



4 StoryTeller

4.2 Improved StoryTeller Template Library

In the latest update of Forsta Visualizations the StoryTeller Templates have been improved to also store original question codes and answer ID's. This means that if the saved question and answer codes exist in the project it is being added to, the objects will be populated with data directly.

When you save a new template within any StoryTeller report, the codes and ID's will be saved automatically.

Within the Template Library the different templates, under the "Layout" tab, which are the previously created ones, and "Data & Layout" tab, which are the new templates that include the metadata information, will be separated, to clearly show if the template includes saved data or not. This means that all previously saved templates will be shown on the tab "Layout" and "All", while the templates saved after this update will be shown on the tab "Data & Layout" and "All".



Here we see the new layout of Template Library.



Within the saved template, information on what has been saved will be displayed. Depending on if the template is one single object with one series, or a full report with multiple objects, the information will be shown differently.

In a single series object, the calculation type, Question code and Answer ID('s) and Filters saved will be displayed both in the template library and within the wizard, if edited.

Template Name *		Tags		
Area Chart		Area B2 S1		
Description		Good for		
Used to display B2 over time with filter S1		Funnel page		
SAVED DATA				
Calculation Type	Questions & Answers		Filters	
Categorical - %	B2 • 1		S1 • 3; 4; 5	

When a single series/object template has been saved.



Wizard All Settings			Sav
SAVED DATA			
Calculation Type	Questions & Answers	Filters	
Categorical - %	B2 • 1	S1 • 3; 4; 5	
2 FILTERS			
3 TIME PERIODS AND INTERVALS			

The same object once it is imported to a StoryTeller and the new section in the Wizard.

In multi series/object templates this information will be shown within the wizard, if edited. In the template library, it will state "Multiple" on all three items.

Here we see the information when there are multiple series or objects saved in a Template.

Template Name *		Tags		
Brand Funnel slide		Funnel		
Description		Good for		
4 metrics, Awareness, Total conside Product	eration, Active Consideration, Preferred	Full funnel slide		
SAVED DATA				
Calculation Type	Questions & Answers		Filters	
Multiple	Multiple		Multiple	





4.3 Improved filter information in Excel export

When a StoryTeller report is exported to Excel, there is a "Filters" sheet showing what optional filters was selected when the export was done. This page has now been updated to also include Hierarchical filter, Variable Subset and Time Period.

In addition to the regular excel exports of a StoryTeller the same information has been added to our Respondent Table excel export.



5 StoryCreator

5.1 Export, Swap and "turn off" tooltips button updates

To improve the workflow within StoryCreator, some buttons and features have been moved. The direct export per object (png and excel) has been moved into the toolbar on the right side (marked with a), Swap button has had a facelift (marked with b) and the option to turn off tooltips has been placed in the right click menu (marked with c). *The new and updated buttons.*





6 Data management

6.1 Tag support on answers

Just as questions can be tagged with the purpose of improving question administration, answers can now also be tagged. The tags are, in the initial version, used to search for answers more efficiently in the Answer block page but later the tags will be supported in more administration pages and in report setup for better support for automated processes. The answer tags are manually added in the system or through the "Download/Upload meta data" function.

The new Tag column in the Answer block page to the right of the ID column (the column is hidden by default).

Answer Block abc Insurance/Brand 1/Brand 2 🖍									
🕭 B2 - A	wareness								
Save	reate grouped answer 🛛 🐥 Apply Colo	r Template 🛛 🚳 View questions connect	ed to this Answer block 👻						
🔄 Select All	Q Search and Replace texts	sorting 👻 🔡 Neg/Neu/Pos 👻 🖨 Ansv	ver color 👻 💲 Sort Answers 👻						
ORDER *	ANSWER TEXT	D	TAGS	EXCLUD FROM COLOR PERCENT/	E Order Order Answer Text				
Q,		Q (2	Q,	Tags				
1	abc Insurance	1	Main brand	•	Exclude from				
2	Brand 1	15	Anonymous competitor	•	Value sorting				
3	Brand 2	18	Anonymous competitor	• 8	Exclude from rank				
4	Brand 3	19	Anonymous competitor		Neg/Neu/Pos Active				
5	Brand 4	20	Anonymous competitor		II Source				
6	Brand 5	31	Anonymous competitor		Usage report				
7	Brand 6	39	Anonymous competitor		Reset to default				
8	Brand 7	43	Anonymous competitor		Sortable group 1				
9	Brand 8	53	Anonymous competitor		Sortable group 1				
10	Brand 9	56	Anonymous competitor		Sortable group 1 🗎				
II 11	TAG Inc.	58	Main Competitor		Sortable group 1 🗎				

To add a tag, enter the input field in the Tag column and type the tag name, suggested tags appear based on already added tags in the same project, click enter when the tag name is complete. Now you can add more tags to the same answers or delete the tag by clicking the existing tag label.

How to add additional tags or delete tags.

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	DER •	ANSWER TEXT		Q,	TAGS	COLOR	EXCLUDE FROM PERCENTAGE	VALUE SO
8	1	abc insurance	1		Main brand X		8	Sortable g
::::::::::::::::::::::::::::::::::::::	2	Brand 1	15		New tag	•		Sortable gr
	3	Brand 2	18		A Anonymous competitor	•		Sortable gr
∷.	4	Brand 3	19		A Main brand	•	\odot	Sortable gr
	-	- 14	20		A			e

You can bulk update tags via the Meta data download/upload process. A "Tag" column is included in the downloaded Excel file when variable settings are included.

Bulk edits of tags via Excel download/upload process.

		Download/Upload Meta data							
		Download		Upl	load	ث			
		Select languages	Select content	Bro	wse No file selected.				
		Z English	Questions and Answers						
			Include variable settings O No Yes						
			Date variables						
			Filters						
			Reports						
			Optional Filters						
			lext boxes						
			Storyteller objects						
			Storyteller slide names						7
1 AnswerID]	AnswerBlockName	Pos / Neg / Neu	Exclude from	avg Factor avg	Colour Code	Color Placeholder	AnswerTags	
.05 709	abc Insurance/Brand 1/Brand	2	Neutral	No	1.000000000	#5C0057		Main brand	abc Insurance
.06 710	abc Insurance/Brand 1/Brand	2	Neutral	No	15.000000000	#880078		Anonymous competitor	Erand 1
.07 711	abc Insurance/Brand 1/Brand	2	Neutral	No	18.000000000	#B60082		Anonymous competitor	Erand 2
.08 712	abc Insurance/Brand 1/Brand	2	Neutral	No	19.000000000	#EA007E		Anonymous competitor	Erand 3
.09 713	abc Insurance/Brand 1/Brand	2	Neutral	No	20.000000000	#B43CE7		Anonymous competitor	Erand 4
.10 714	abc Insurance/Brand 1/Brand	2	Neutral	No	31.000000000	#835FFF		Anonymous competitor	Erand 5
11 715	abc Insurance/Brand 1/Brand	2	Neutral	No	39.000000000	#5200D6		Anonymous competitor	Brand 6
12 /10	abc insurance/Brand 1/Brand	2	Neutral	NO	43.000000000	#010865		Anonymous competitor	brand /
14 719	abc insurance/Brand 1/Brand	2	Neutral	NO	53.000000000	#323546		Anonymous competitor	Brand 9
15 719	abc Insurance/Brand 1/Brand	2	Neutral	No	58,00000000	#222222		Main Competitor	14G Inc
16 720	abc Insurance/Brand 1/Brand	2	Neutral	No	65.000000000	#F2F2F2		Anonymous competitor	Brand 10
17 721	abc Insurance/Brand 1/Brand	2	Neutral	No	70.000000000	#5C0057		Anonymous competitor	Frand 11
.18 722	abc Insurance/Brand 1/Brand	2	Neutral	No	73.000000000	#880078		Anonymous competitor	Frand 12

6.2 Improvements Tag on Questions

Some smaller adjustments have been implemented on Question Tags. Tags can now be added on multiple questions at the same time, allowed separators for Tags in "Download/Upload meta data" are "," (comma) and ";" (semi-colon).