Forsta Visualizations December 2023 Release

1 Introduction

This document provides the new and improved features in the Forsta Visualizations 2023 December Release.

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

Best Regards,
Forsta Team

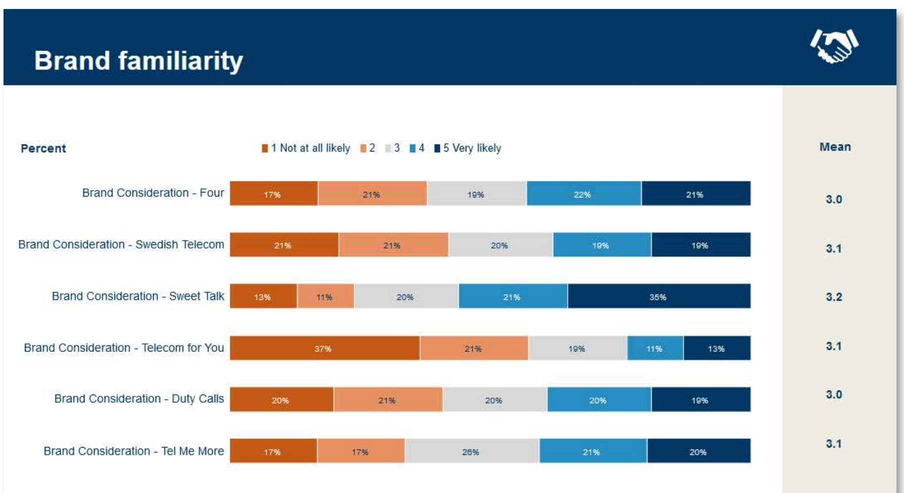
2 Overview

StoryTeller – Enhancements to the Auto-generate slides feature

The capability to auto-generate slides/reports has been significantly enhanced, leading to more condensed and dynamic auto-generated reports.

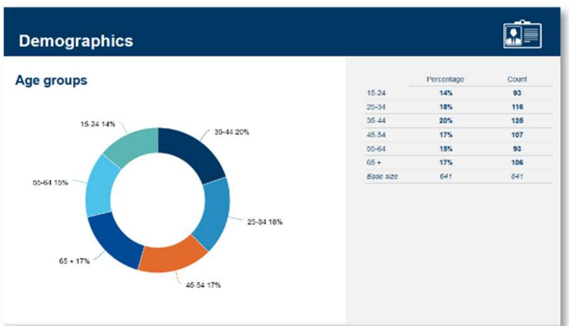
- Multiple questions can now be reported in a single slide, providing a more comprehensive overview and facilitating easier comparison of results, particularly in grid questions.

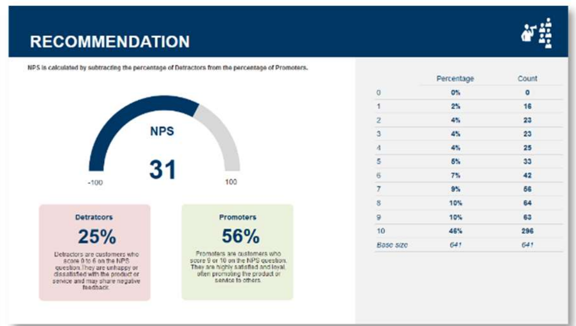
This is an example of a slide featuring multiple questions that can now be easily auto-generated.



- A new set of slide template rules has been introduced, enabling the creation of more precise template slides. These rules can be based on factors such as Question Tags, Question Codes and Question Texts, allowing the use of dedicated slide templates for specific use cases.

This is an example of auto-generated slides based on these new rules. In this template set, the slide on the right is applied to all questions with "NPS" in the question code, while the slide on the left is applied to questions that contains "DG" (DG in this case is demographics) in question code. Automated reports can now be customized for different use cases, if standards such as question codes or question tags are utilized in your projects.



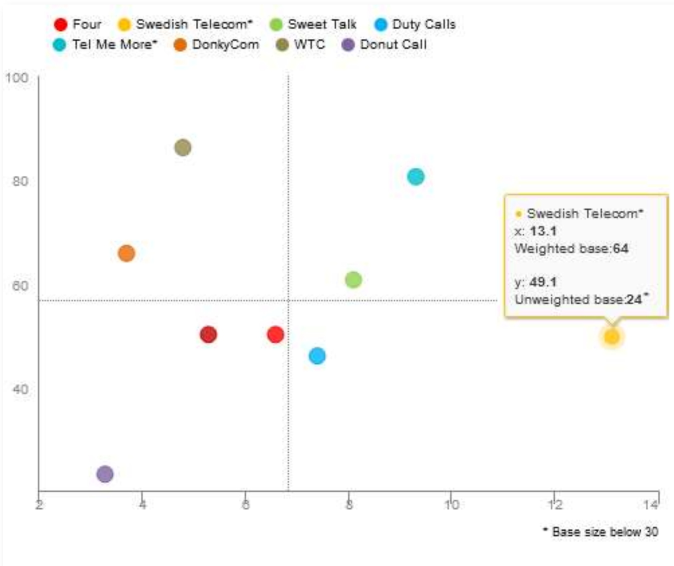


StoryTeller - General updates

- Charts and tables now support simultaneous use of "benchmark only" and significance testing. This update eliminates the need for multiple objects in scenarios like the one shown below, as both the benchmark and significance test results are presented in a single data object.

- Scatter and Bubble charts now support base size suppression and base size warning. Limits can be defined globally for all series (X, Y, and Z for Bubble; X and Z for Scatter) or individually per series to accommodate various use cases.

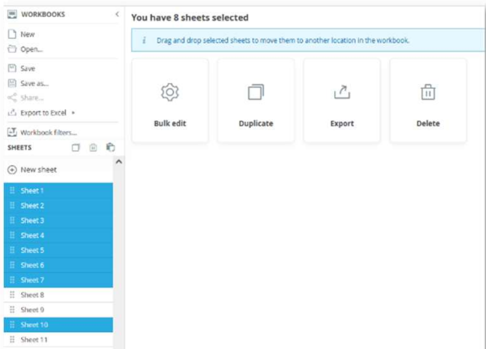
Here is an example of base size warnings in a scatter chart, where series with low base sizes are highlighted with an asterisk (*) in legend and in tooltip.

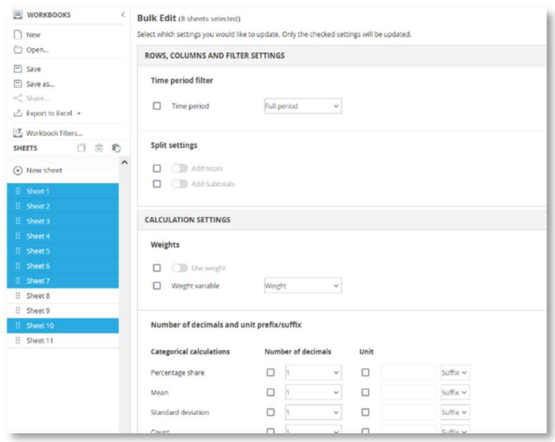


CrossTable tool updates

- A new bulk sheet editing feature streamlines the change management process in Workbooks with multiple sheets. The initial release focuses on adjusting general settings. Easily modify settings such as time periods, enable or disable weights, adjust applied weight variables, and change the number of decimals, among others. The bulk edit option saves time by allowing changes to be made once instead of individually for each sheet.

Below, we showcase the new bulk edit option (appearing when multiple sheets are selected) on the left, and the bulk edit panel itself on the right.



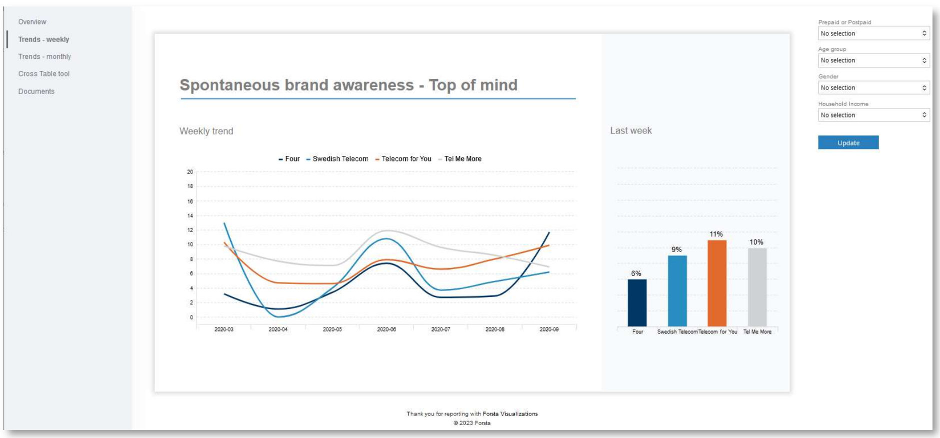


- Loading performance is improved in workbooks with many sheets, leading to a significantly reduced loading time when opening saved workbooks. This enhancement contributes to a better overall user experience.

Customizable Project theme

- A new “customizable” project theme enables easy adjustments of the overall portal design to match end-customers design preferences. Through an interface, you can change report navigation colors, adjust report navigation positions, add customer logos, and more. This customization operates at the project level and complements the existing Theme logic, which is still available for more advanced theming preferences applied to multiple projects.

This image illustrates a theme layout with report navigation on the left and filters positioned to the right.

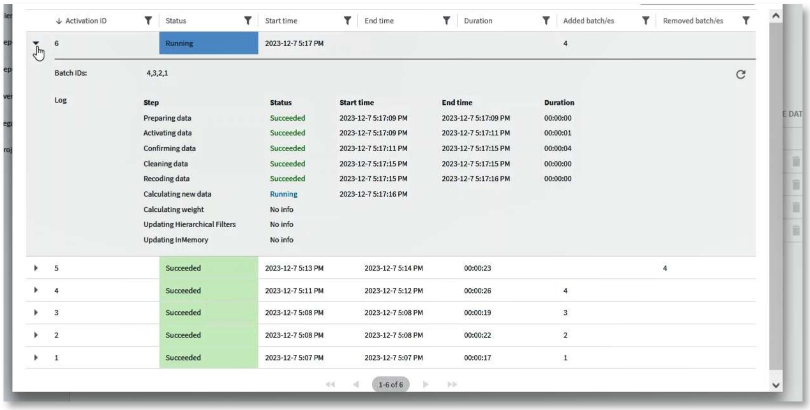


- This feature is currently in limited availability. To enable access for your customer and explore it before its general release, please contact your account manager.

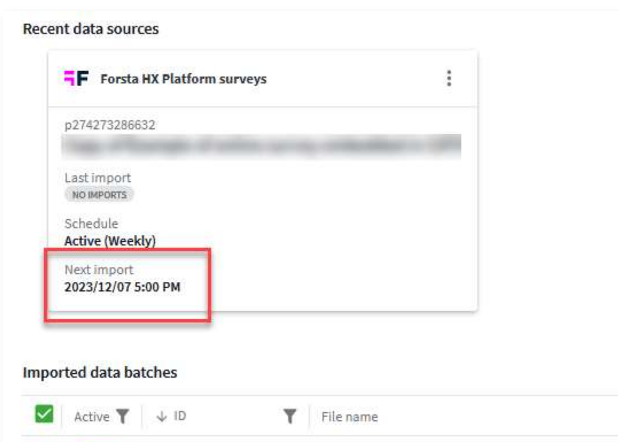
Data Management updates

- Monitor the data activation process with the newly introduced Activation log view. This feature provides enhanced visibility into activation times and the status of individual steps, including data import, computing of new variables, data cleaning, and hierarchy updates etc. The log also clearly lists the newly added data batches and those that were removed.

This is an example of a data activation in progress.



- The import process for surveys from the Forsta HX platform now supports Text Analytics data from multiple "Text Analytics flows" instead of just one. This enhancement allows for the analysis of open-ended questions using different models.
- Ask and Act data integration is now available in new Data Import Scheduler page, it was previously only accessible in old import scheduler page.
- The Export and Import scheduler now display the "next" export/import time, providing improved visibility into upcoming scheduled exports. Below is example from a saved Import job.

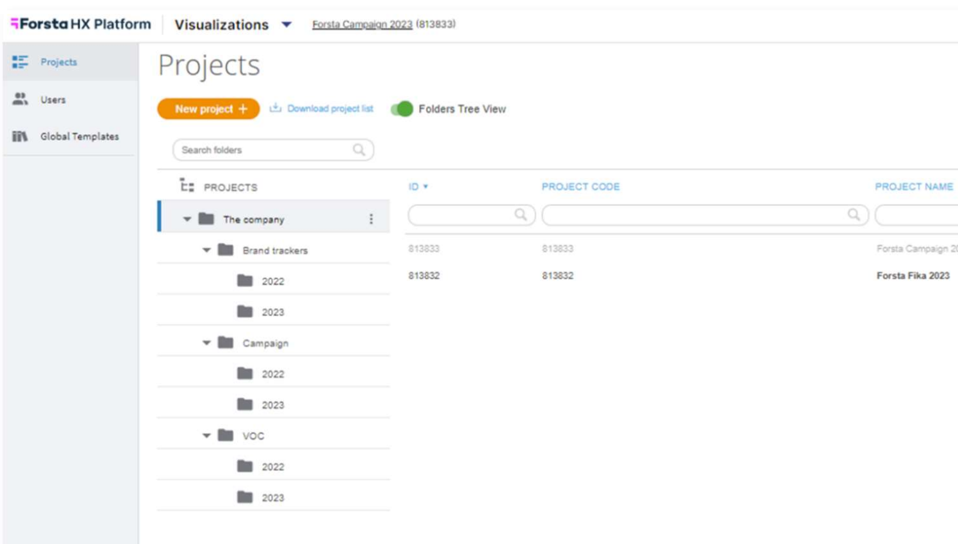


- The SPSS Export feature has been improved. In multi-language projects, you can now choose the language for exports. Additionally, new options allow you to exclude computed and merged variables from exports, ensuring that the exported data can be exported in the same format as it was originally uploaded to the project.

Project administration updates

- In the Project Selection page you can choose between tree view and drop-down filters for folder structure filtering. The tree view is now the default and your last used preference is now saved, making it the default view upon logging in. The selected folder also remains during your session, eliminating the need to reselect it if you navigate away and return.

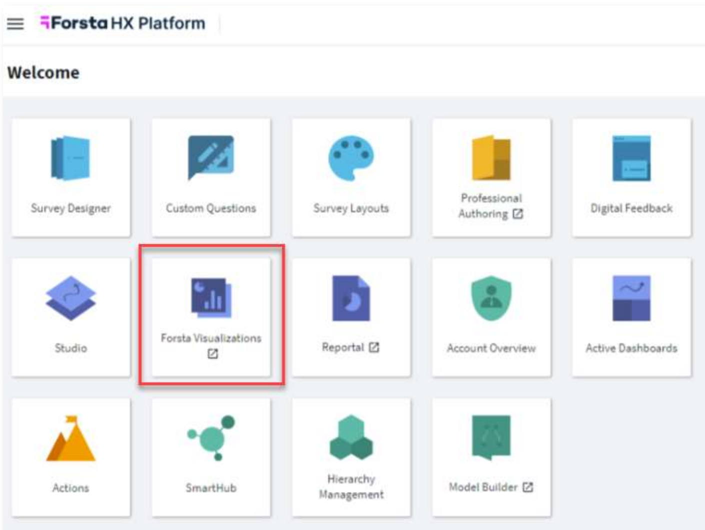
Below, we observe the tree view, which is now the default setting upon login.



Seamless Login from Forsta HX Platform to Visualization

- Enhancing the user experience for customers using both Forsta HX platform and Forsta Visualization, you can now seamlessly log in to Visualization directly from the Forsta HX platform (a one-way integration).

In the Forsta HX platform, click the Visualization link and it will open in a new browser tab.

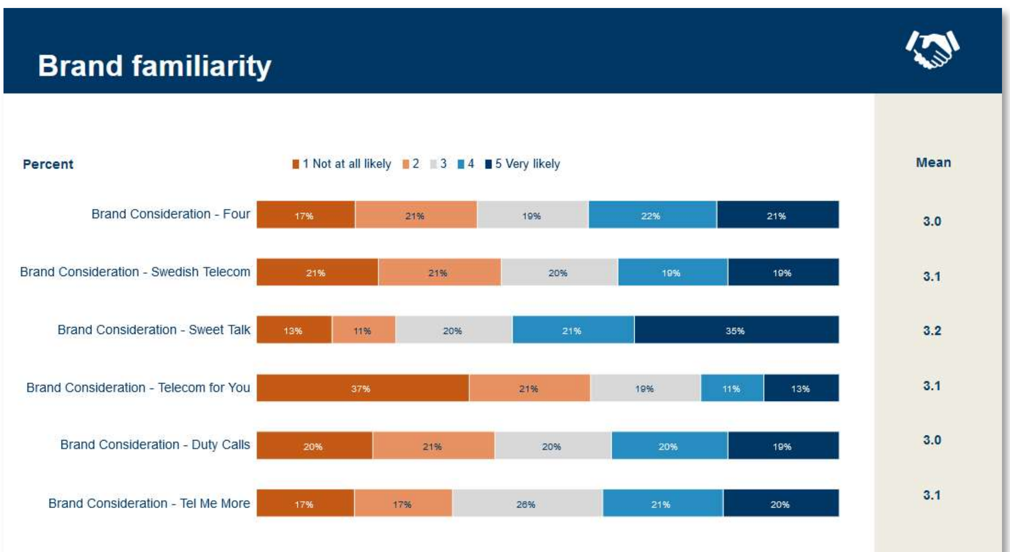


- To enable this feature, a "SSO" connection needs to be defined for your customer, including user mapping, the Forsta HX Platform support team will assist you with the setup.

3 StoryTeller: Automatic Slide Generation Updates

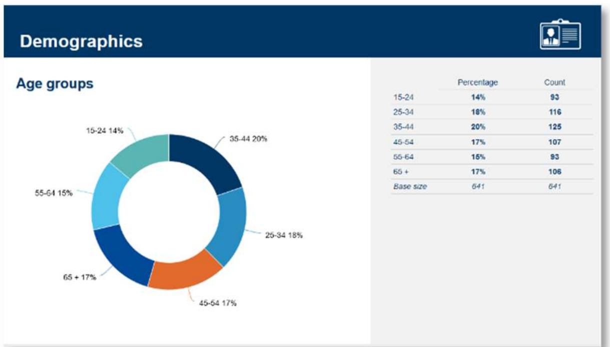
The capability to auto-generate slides/reports has been significantly enhanced, leading to more condensed and dynamic auto-generated reports.

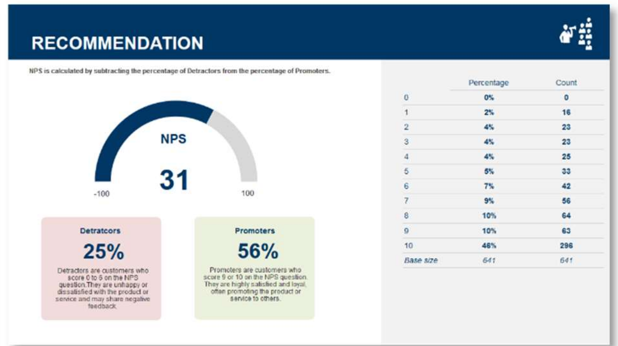
Multiple questions can now be reported in a single slide, providing a more comprehensive overview and facilitating easier comparison of results, particularly in grid questions.



A new set of template rules has been introduced, enabling the creation of more precise template slides for different use cases. These rules can be based on factors such as Question Tags, Question Codes and Question Texts, allowing the use of dedicated slide templates for demographic questions, awareness questions, NPS questions, and so forth.

Below, we showcase auto-generated slides based on these new rules. In this example, the slide on the right is applied to all questions with "NPS" in the question code, while the slide on the left is applied to questions with the question that contains "DG" (DG= demographics).



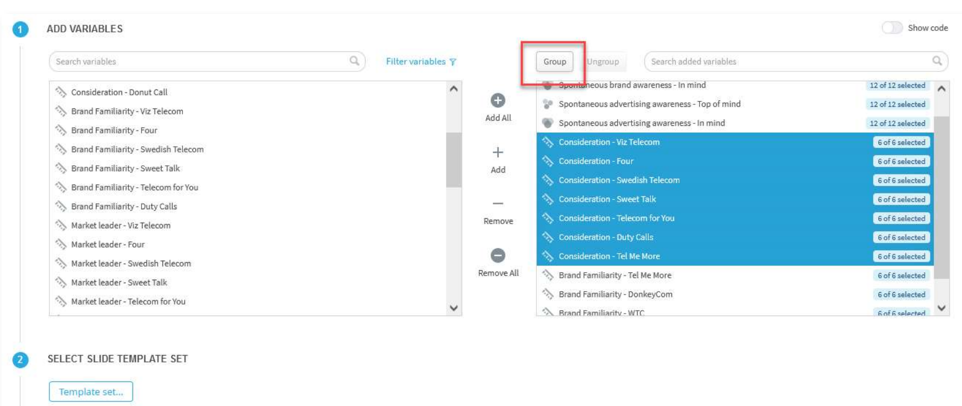


3.1 Report Multiple questions in a single slide

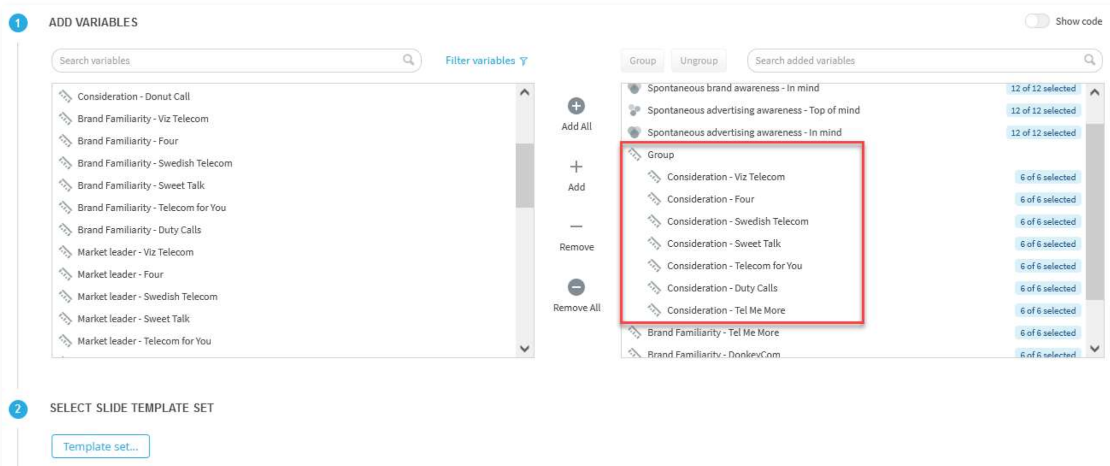
Follow these steps to report multiple questions on the same slide:

1. In the Autogenerate slides panel, add the variables you want to report to the right-hand side list.
2. To group variables on the same slide, select the desired variables and click "Group" (refer to the image below).

Note: You can only group variables of the same type; for instance, multiple scale variables or multiple numeric variables can be grouped together, but you cannot group a scale and a numeric variable in the same group.



3. The grouped variables will now appear as a single group in the selection list. This indicates that these variables will be added into the same slide.



To ungroup, use the “Ungroup” option. To add /remove question to/from an existing group use drag and drop.

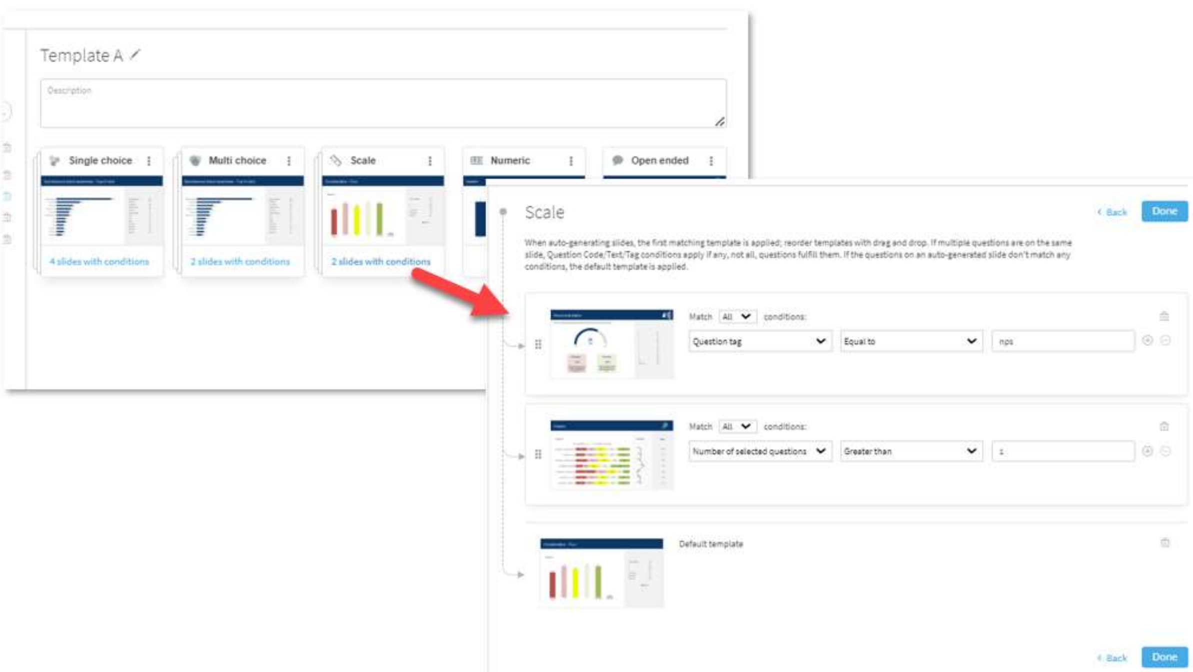
In the Auto-generation process, variables reported on the same slide will be included in all data objects on that slide. For instance, if the slide template includes both a chart and a table, the variables will be added into both the chart and the table.

Note: In the previous version, it was not possible to save a slide into a template set if the slides contained data objects, such as a chart or a table, with multiple variables. This limitation has now been removed, allowing the creation of slide templates that are useful for multiple variables.

3.2 Template slides with conditions

In the previous version, logic was employed to assign a slide template to each variable based on variable type. For instance, all scales were reported in the same slide template, and all single-choice variables were assigned to another. For more precise reporting, you now have the option to have multiple slide templates for each variable type. Each template set can include a "default" slide template for each variable type and additional slide templates with conditions.

Below, we provide an example of slide templates for scale variables in a Template set. As illustrated, there are two slide templates with specific rules and a default slide template (located at the bottom of the list). During the slide generation process, the templates are evaluated from top to bottom. When the condition specified in one of the slides with rules is met, the corresponding slide template is utilized. If none of the template slides with rules is met, the default slide template is applied to the question.



3.2.2 Available conditions

The following types of conditions can be applied to a slide template:

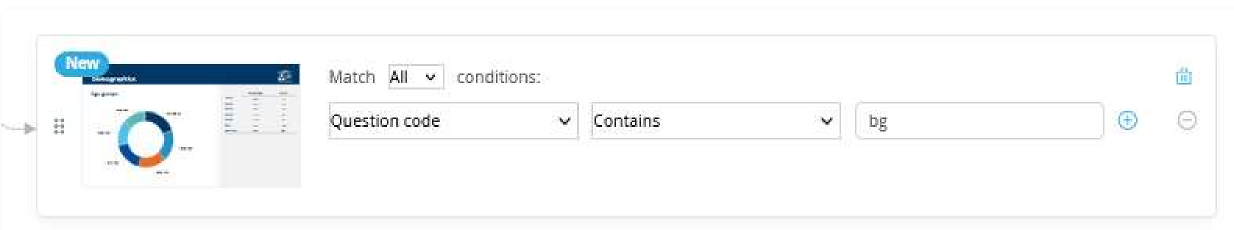
- Number of questions

- Number of answers
- Question tag
- Question code
- Question text

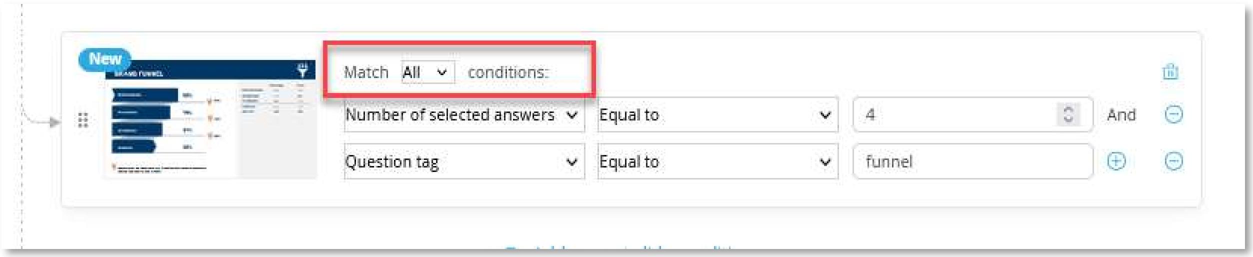
For each of these types, you specify an operator to be used. For instance, when using the "Question code" as a condition, you can choose from the following operators:

- Equal to
- Not equal to
- Contains
- Does not contain
- Starts with
- Ends with
- In the list

For example, the slide template demonstrated below is applied to all questions containing “bg” in the question code. This means it will be applied to questions with codes such as bgGender, bgAgegroups, bgIncome etc.



A slide template can include one or multiple conditions. When multiple conditions are applied, you can specify whether “All” or “Any” of them should be met. Below is an example of a brand funnel slide that will be applied if the question has four answers, and the question tag is equal to “funnel”. Since “Match All conditions” is selected, the slide template will only be applied to questions that fulfill both conditions.

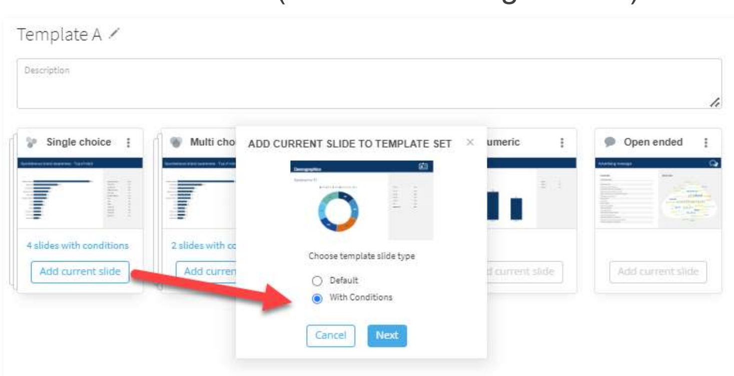


Note: *For conditions based on Question Code/Text/Tags, if multiple questions are added to the same slide during the auto-generation process, conditions apply if any, not all, questions fulfill them. For instance, if the condition is "Question text contains "ABC"' the condition will be fulfilled if any question added to the slide contains the question text "ABC".*

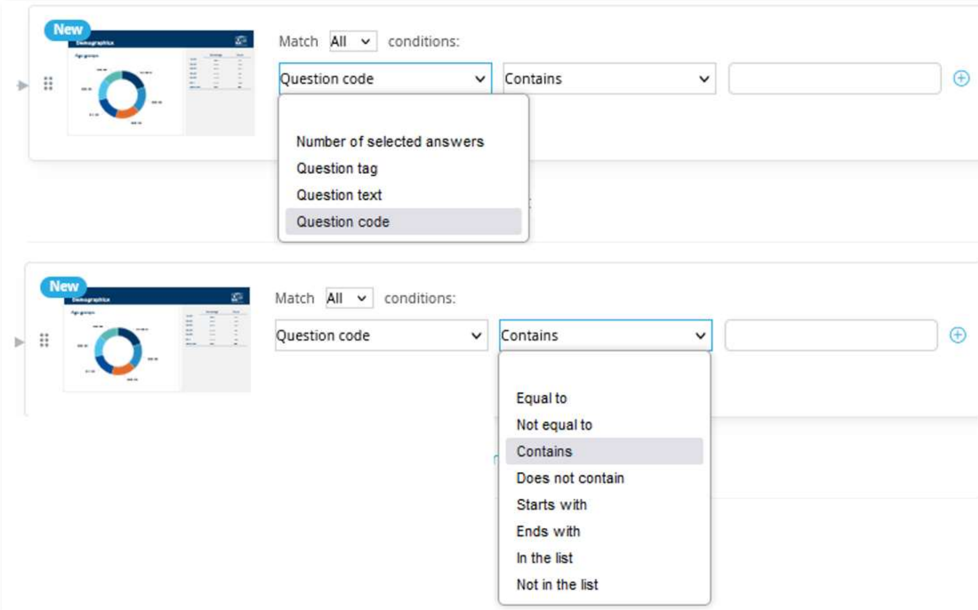
3.2.1 Create Slide template with conditions

The process for creating slide templates, in a Template set, remains the same as before if no additional conditions, aside from variable type, are to be applied. To create a slide template with conditions, follow these steps:

1. Create the slide to be saved into the template set and choose to save it into a Template set.
2. After selecting the Template set, choose to save the slide "with conditions" instead of "Default" (refer to the image below).

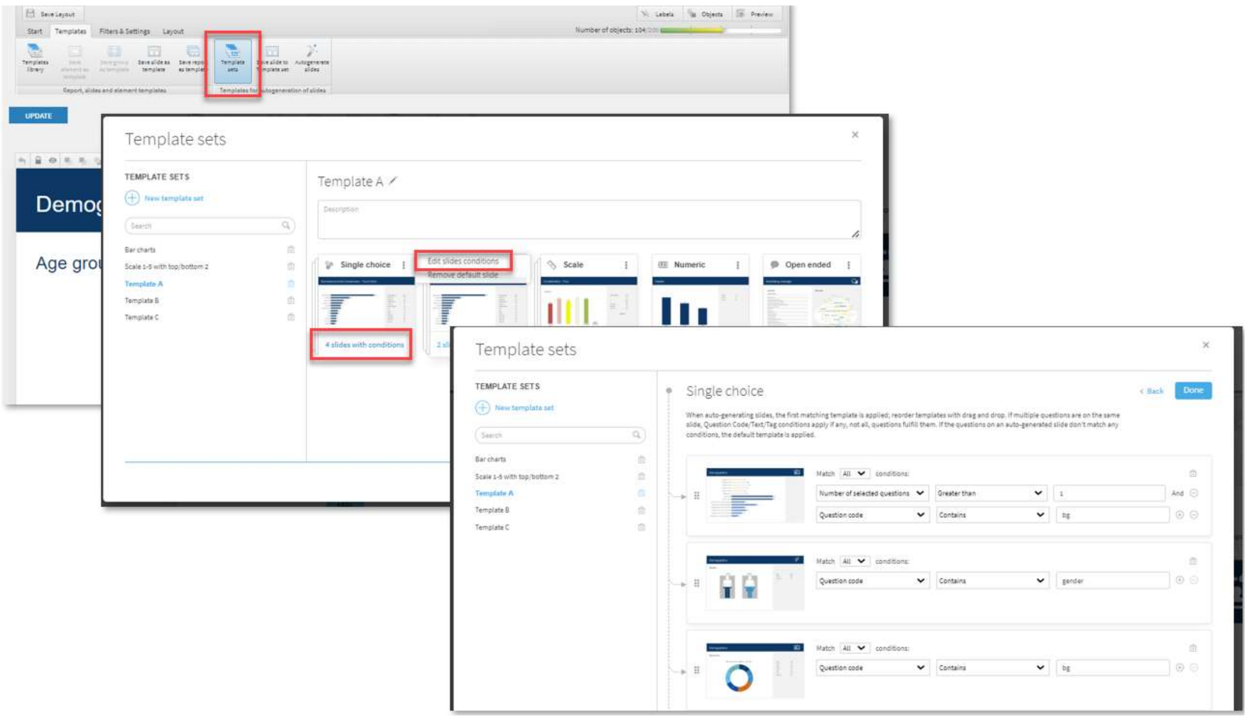


3. In the appearing view define the condition by selecting the type (Question code, Question tag, etc.) and the operator (Equal to, starts with, etc.).



4. If multiple slide templates with conditions are present, the sort order can be changed with drag and drop. The sort order is crucial. If a question meets the conditions in multiple slides, the template from the first matching slide will be applied to the question. If a question does not match any of the predefined conditions, the default slide template will be applied.
5. “Click 'Done' to finalize the condition setup. If you don't want to save the slide to any other Template set, simply click 'Save' to complete the action.

To modify the conditions of previously saved slide templates, enter the Template Set and click any of options highlighted in image below to view all slides with their respective conditions. From this point, you can proceed to edit or delete any of the slides as needed.


Template sets
TEMPLATE SETS
New template set
Bar charts
Template A
Template B
Template C
Single choice
Edit slides conditions
Remove default slide
Scale
Numeric
Open ended
4 slides with conditions
Demog
Age grou
UPDATE
Done
Match
conditions:
Question code
Contains
Number of selected questions
Greater than
gender

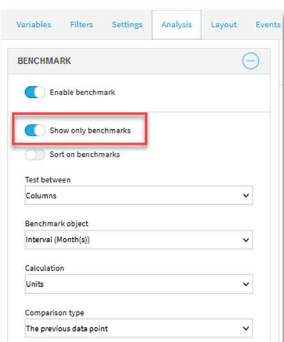
4 Storyteller - general updates

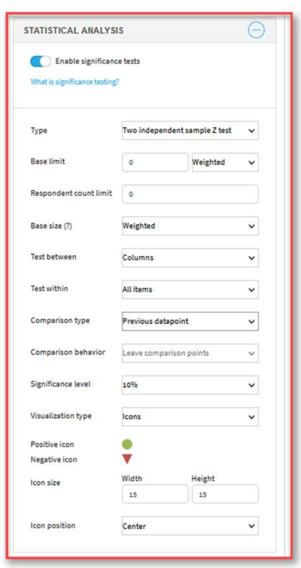
4.1 Support for display of “Benchmark only” with significance test

Charts and tables now support simultaneous use of "benchmark only" and significance testing. This update eliminates the need for multiple objects in scenarios like the one shown below, as both the benchmark and significance test results are presented in a single data object.

Example of an object displaying "benchmark only" with an applied significance test.

The image below highlights the settings that now collaborate; the significance test is applied to the original values, even if the object only displays the benchmark value.

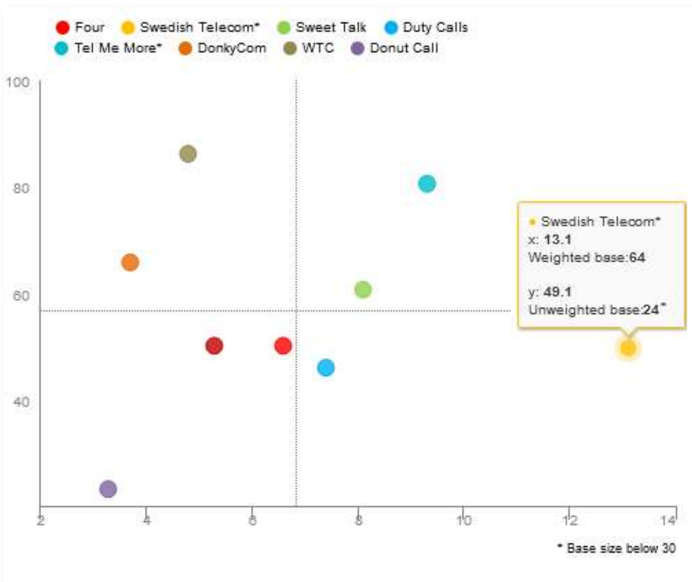




4.2 Base suppression support in Scatter/Bubble charts

Scatter and Bubble charts now support base size suppression and base size warning. Limits can be defined globally for all series (X, Y, and Z for Bubble; X and Z for Scatter) or individually per series to accommodate various use cases.

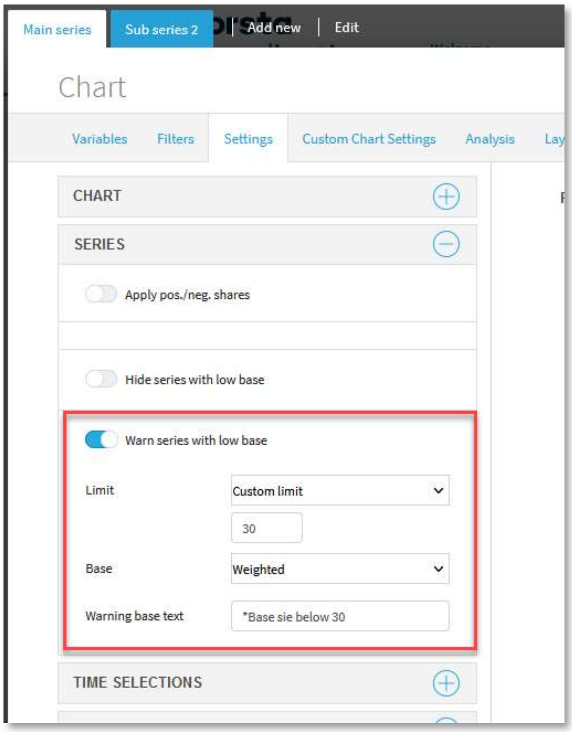
Here is an example of base size warnings in a scatter chart, where series with low base sizes are highlighted with an asterisk (*).



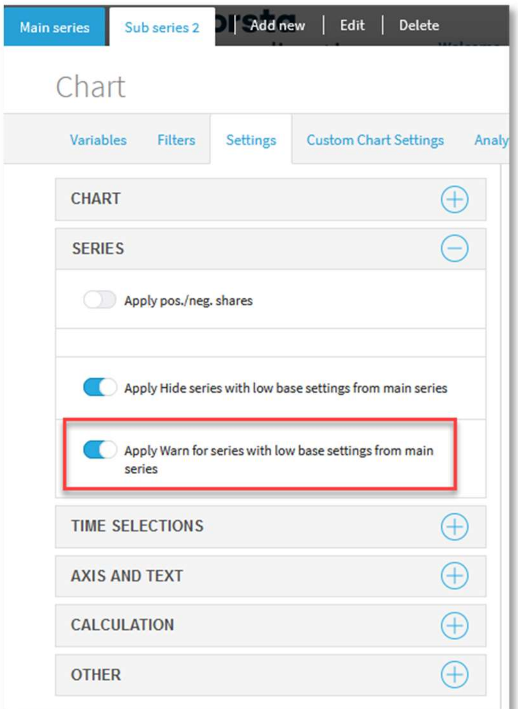
4.2.1 Setup warning and suppression limits

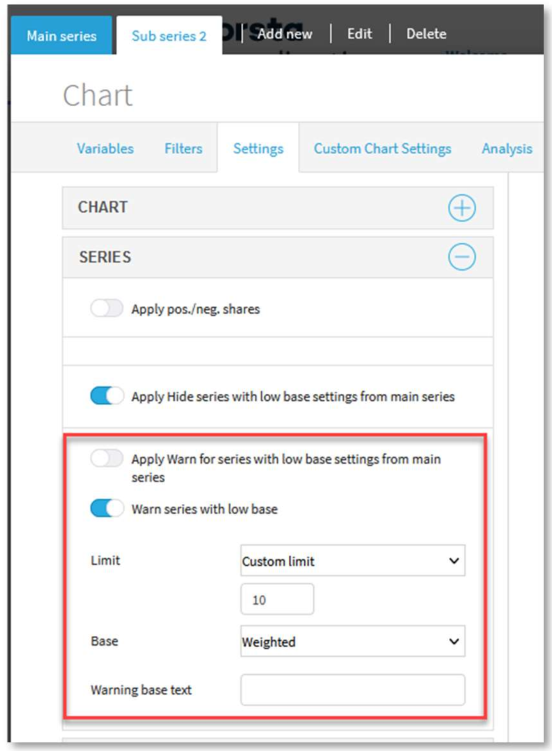
The setup of warning and suppression limits functions similarly to other chart types, such as bar or column charts. Since a scatter chart contains two series (x and y) and a bubble chart contains three series (x, y, and z), the base size warning and suppression rules can be defined in the main series and automatically applied to the other series, or set individually for each series. In a scatter and bubble chart, the main series represents the X-axis.

In the example below, the base size warning is set to 30 respondents for the main series (X-axis).



Below example shows the controls for the sub-series (Y-axis). On the left, the option to inherit settings from the main series is used, requiring no additional setup if the same rules should apply to both X and Y. On the right, an example is shown where a separate limit is set on the Y-axis.


Main series
Sub series 2
Add new
Edit
Delete
Chart
Variables
Filters
Settings
Custom Chart Settings
CHART
SERIES
Apply pos./neg. shares
Apply Hide series with low base settings from main series
Apply Warn for series with low base settings from main series
TIME SELECTIONS
AXIS AND TEXT
CALCULATION
OTHER

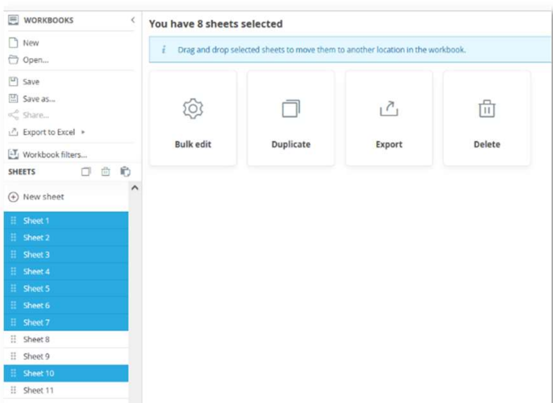

Main series
Sub series 2
Add new
Edit
Delete
Chart
Variables
Filters
Settings
Custom Chart Settings
Analysis
CHART
SERIES
Apply pos./neg. shares
Apply Hide series with low base settings from main series
Apply Warn for series with low base settings from main series
Warn series with low base
Limit
Custom limit
10
Base
Weighted
Warning base text

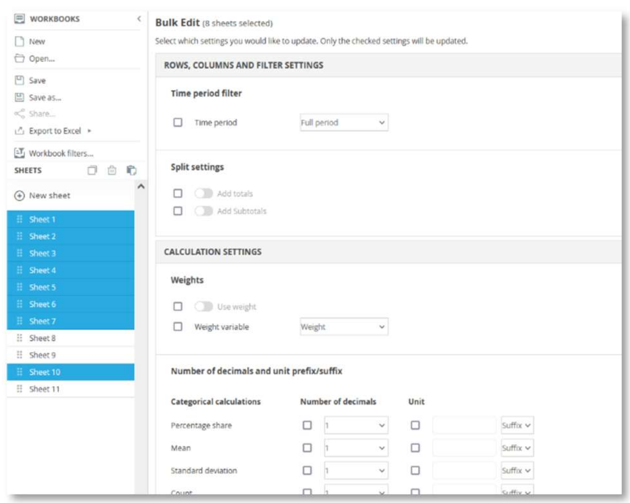
5 CrossTable tool update

5.1 Bulk sheet edit feature

A new bulk sheet edit feature streamlines the change management process in Workbooks with multiple sheets. The initial release focuses on adjusting general settings.

Below, we showcase the new bulk edits option (appearing when multiple sheets are selected) on the left, and the bulk edit panel itself on the right.





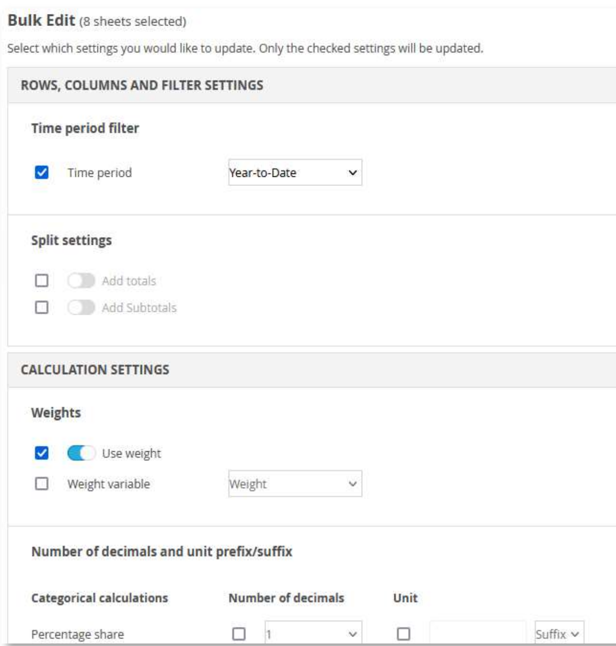
With the new bulk edit feature, you can modify the following settings across multiple sheets:

- Time period, with the ability to change the date variable if multiple are available
- Split Totals and Subtotals
- Weighting (on/off), with the ability to change the weight variable if multiple are available
- Number of decimals per calculation type
- Unit prefix/suffix, such as “%” per calculation type

To apply bulk edits, follow these steps:

1. Select the sheets to be updated, use CTRL or Shift (or the appropriate keys for your operating system) for selecting multiple sheets
2. In appearing bulk action menu, select "Bulk edit".
3. In the appearing menu, tick the checkbox of the setting to be updated—only ticked settings will be updated.
4. Set the new value for each setting to be updated.
5. Click "Update Settings"
6. The selected settings will now be updated in all selected sheets. As always, save the Workbook to retain the changes.

In this example the user chooses to update the time period, setting the new value to "Year-to-date", and applying Weight across all selected sheets.



6 Customizable Project Theme

A new "Customizable" project theme enables easy adjustments the overall portal design to match end-customers design preferences. Through an interface, you can change report navigation colors, adjust report navigation positions, add customer logos and more. This customization operates at the project level and complements the existing Theme logic, which is still available for more advanced theming preferences applied to multiple projects.

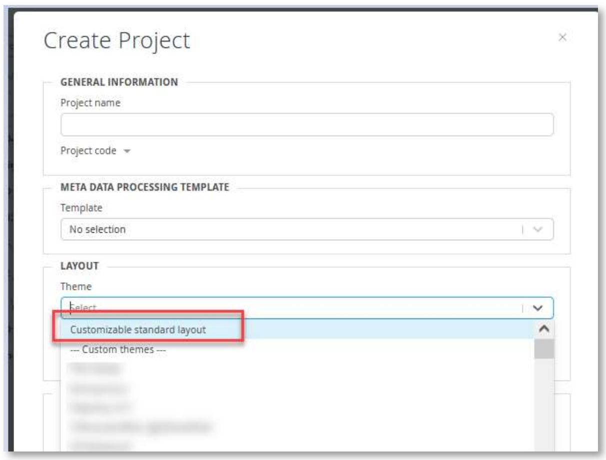
The image below illustrates a theme layout with report navigation on the left and filters positioned to the right.

Note: *This feature is currently in limited availability. To enable access for your customer and explore it before its general release, please contact your account manager.*

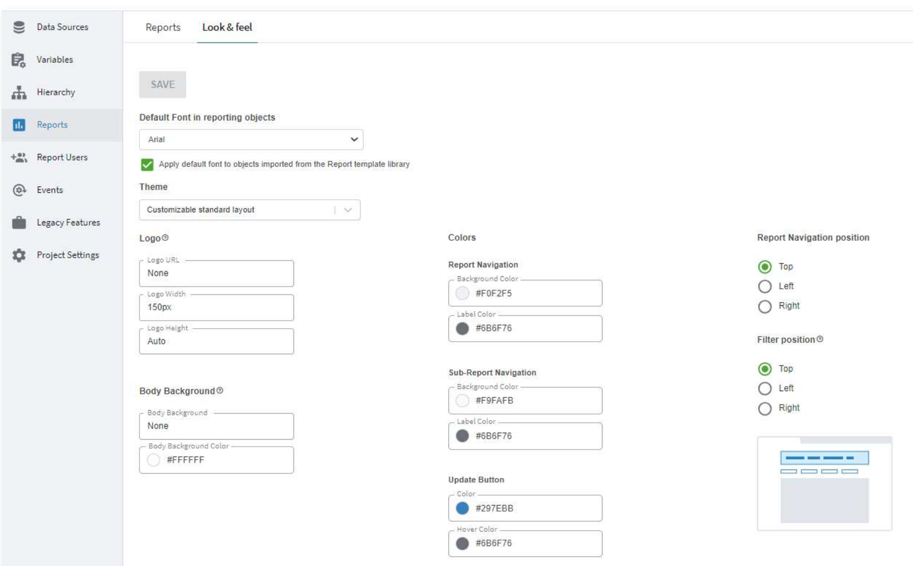
6.1 How to apply and Customize the theme

To make use of the new customizable theme, begin by applying the theme named "Customizable Standard Layout" to your project. You can do this during Project Creation, in Project settings, and now also in the new "Look and Feel" page located in the Report section. Refer to the image below for guidance.

Below, you can observe the option to apply the Customizable Standard Layout to your project during project creation.



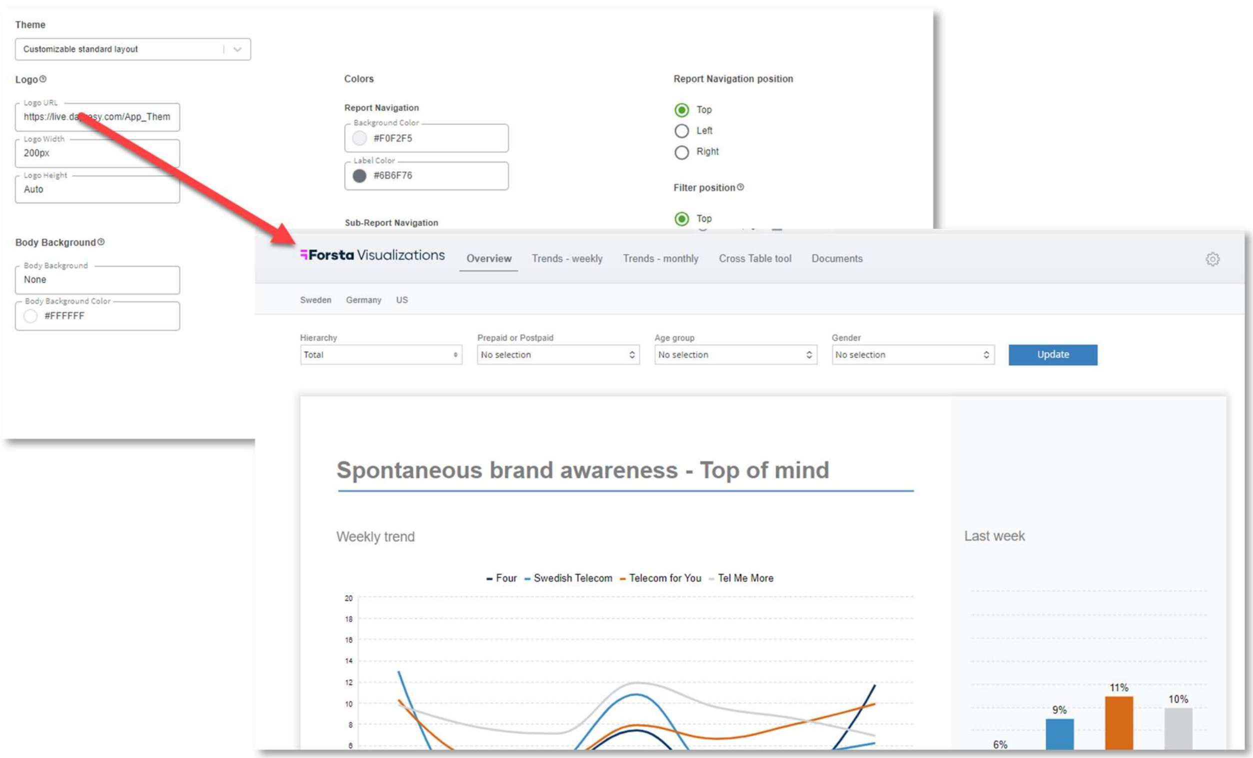
Once this theme is applied to your project, you will discover all customization options in the new "Look and Feel" page, as illustrated in the image below.



The following layout items are customizable:

Logo

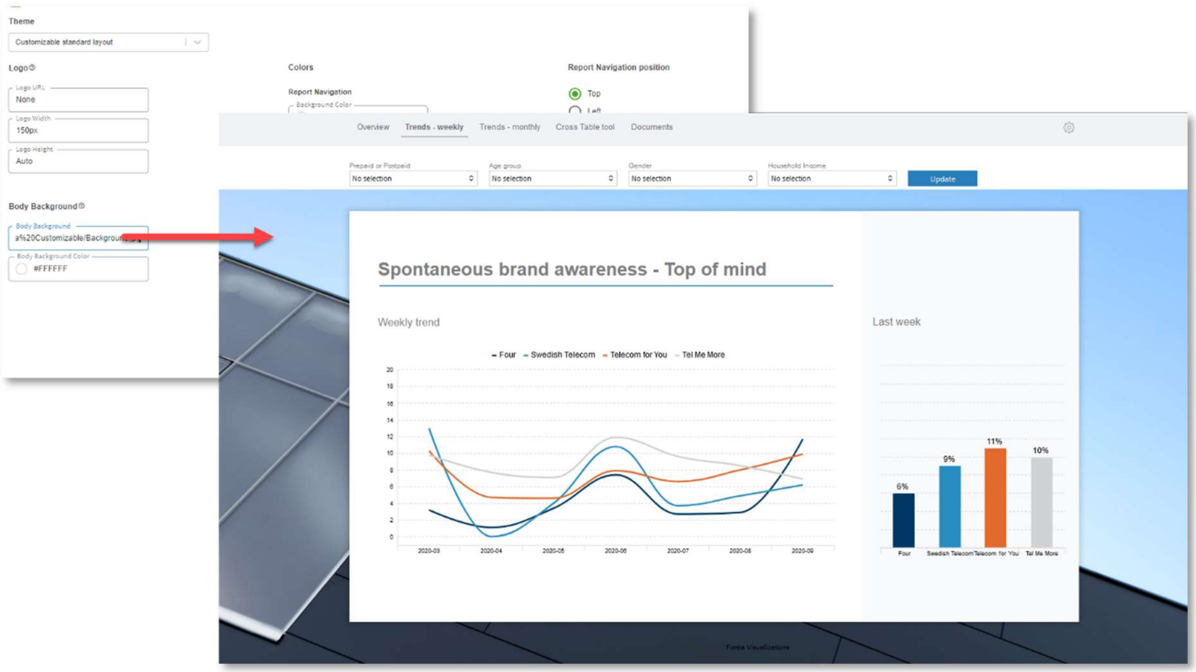
You can add your own logo by adding an external URL for the logo. The maximum display size of the logo is 200 pixels wide. If the uploaded/referenced logo exceeds this width, it will be automatically resized.



When adjusting the logo size, such as the height, ensure "Auto" is selected for width to maintain proportional scaling.

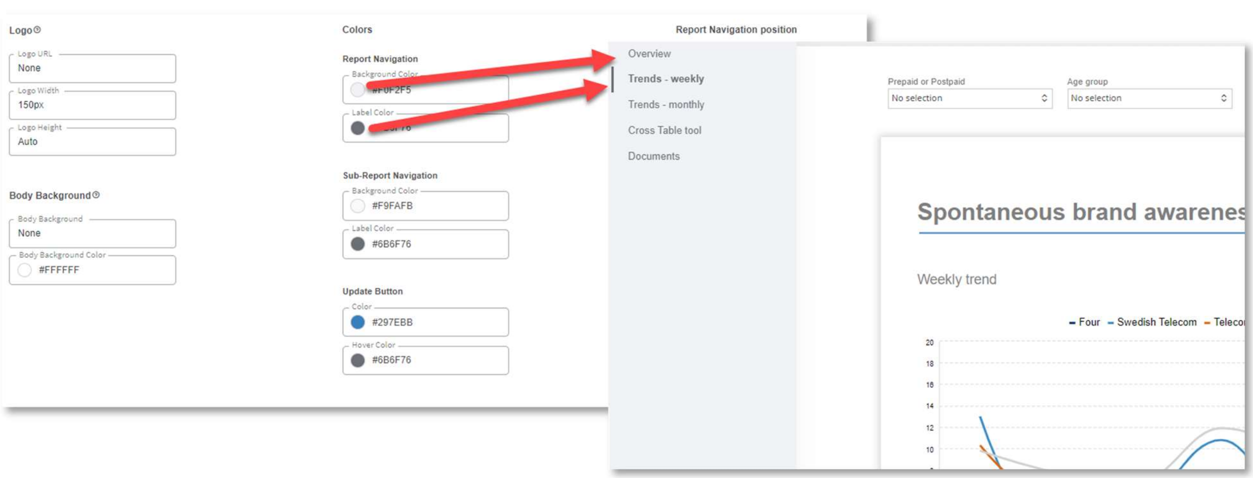
Body background

Specify a color for the body background and/or add an external URL for the body background image. Below, you can see an example of an uploaded image as the body background.



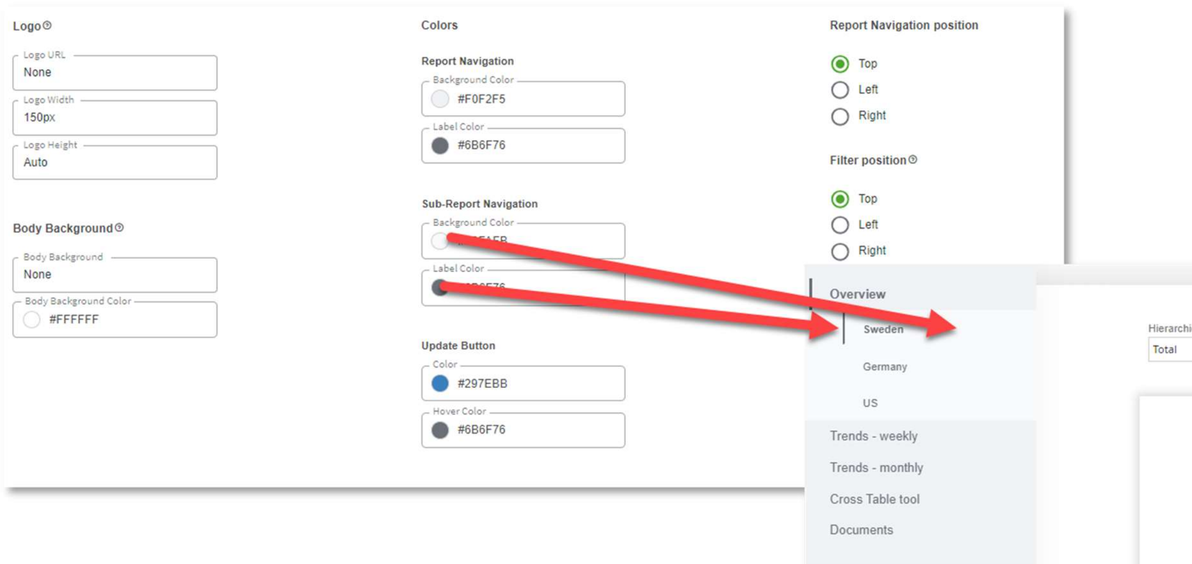
Colors: Report navigation

Within the Report Navigation section, you can select a background color and choose the color of the report name labels. Refer to the example below.



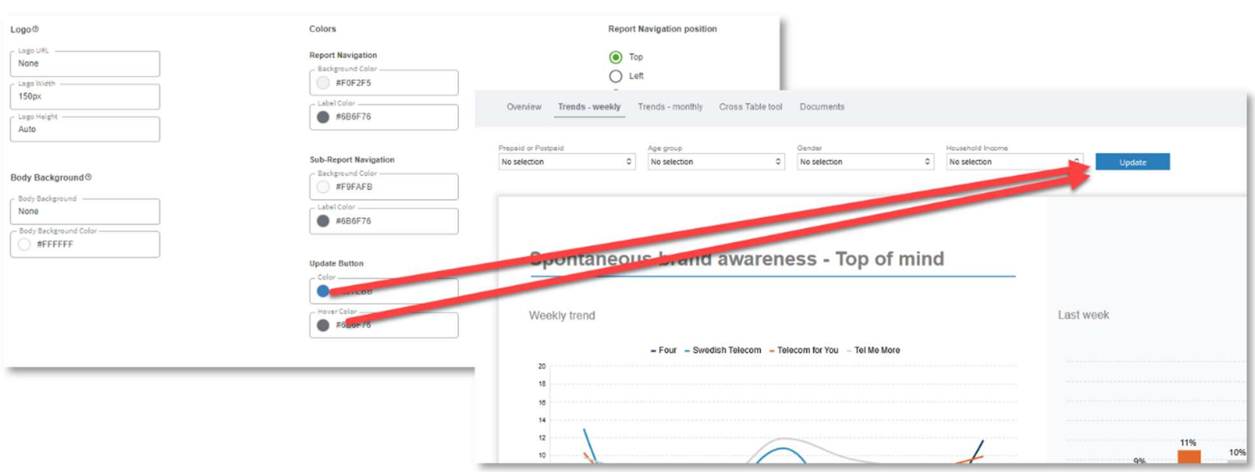
Colors: Sub-Report navigation colors

In the Sub-Report Navigation section, you can customize the appearance of sub-report navigation in Storyteller, when displayed as tabs. Pick a background color and specify the color of the report name labels. See the example below.



Colors: Update button

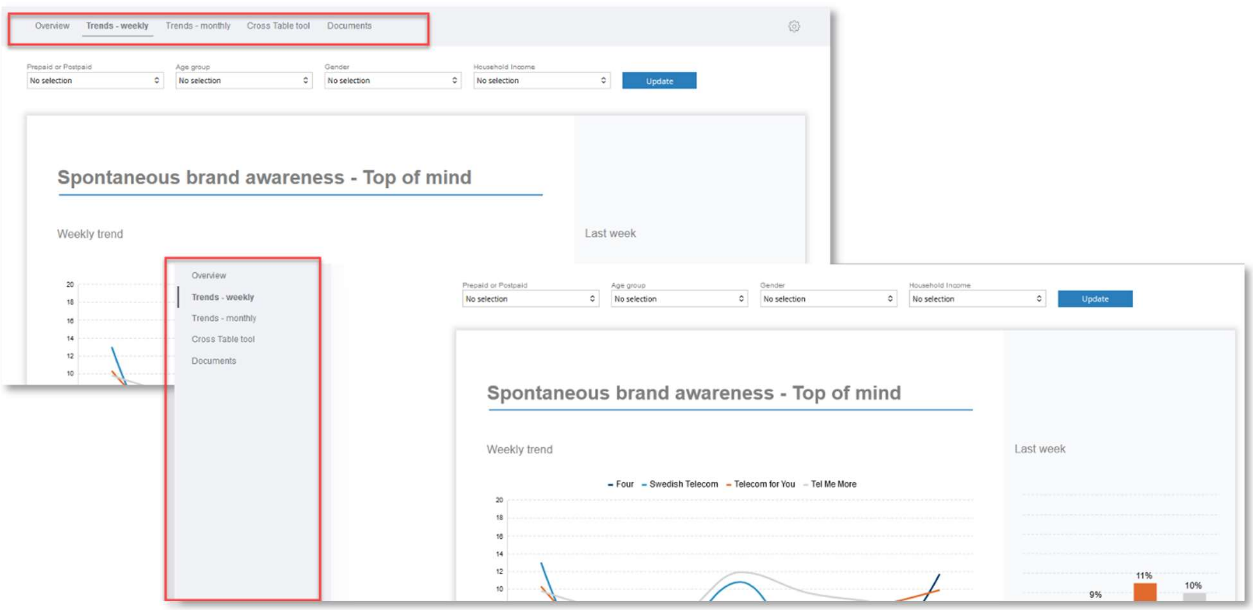
Within the Update Button Colors section, you can style the Update button in StoryTeller reports. This button is used to apply selected optional and hierarchy filters. Choose both the color and hover color as needed.



Report navigation position

The report navigation is shown at the top of the page by default but can also be positioned left or right.

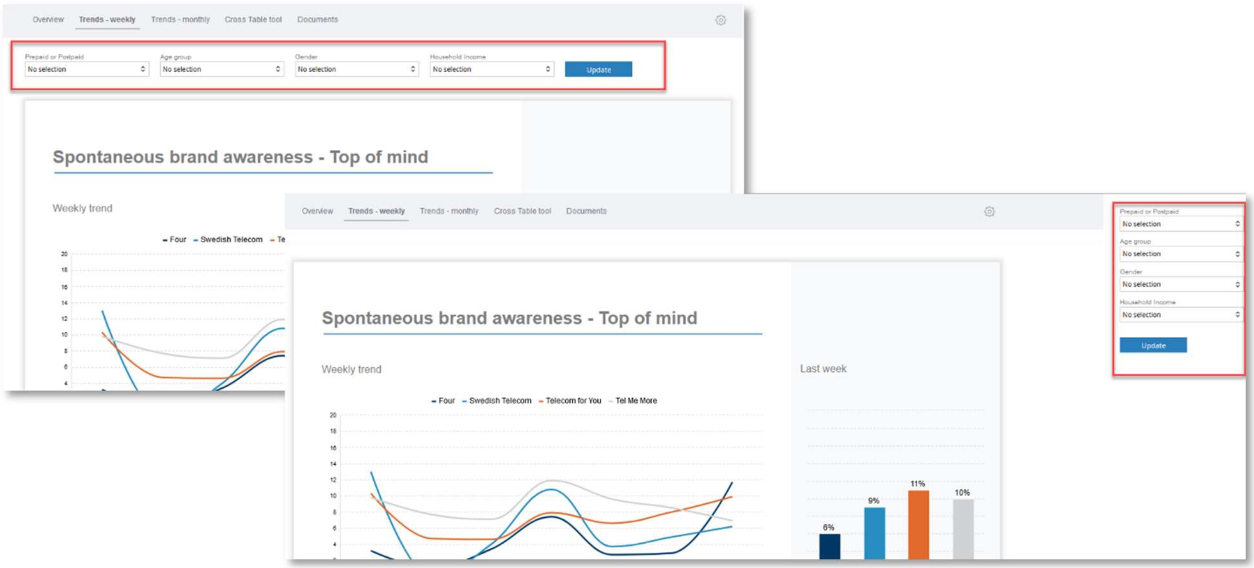
Examples showcase the flexibility of placing report navigation at various positions.



Filter position

The Hierarchy and Optional filters in StoryTeller and Document Archive reports are displayed at the top of the page by default, but they can also be repositioned to the left or right.

Examples showcase the flexibility of placing Hierarchy and Optional filters in StoryTeller and Document Archive reports at various positions.



Overview
Trends - weekly
Trends - monthly
Cross Table tool
Documents
Prepaid or Postpaid
Age group
Gender
Household Income
No selection
Update
Spontaneous brand awareness - Top of mind
Weekly trend
Last week
Four
Swedish Telecom
Telecom for You
Tel Me More
6%
9%
11%
10%

7. Data connectivity updates

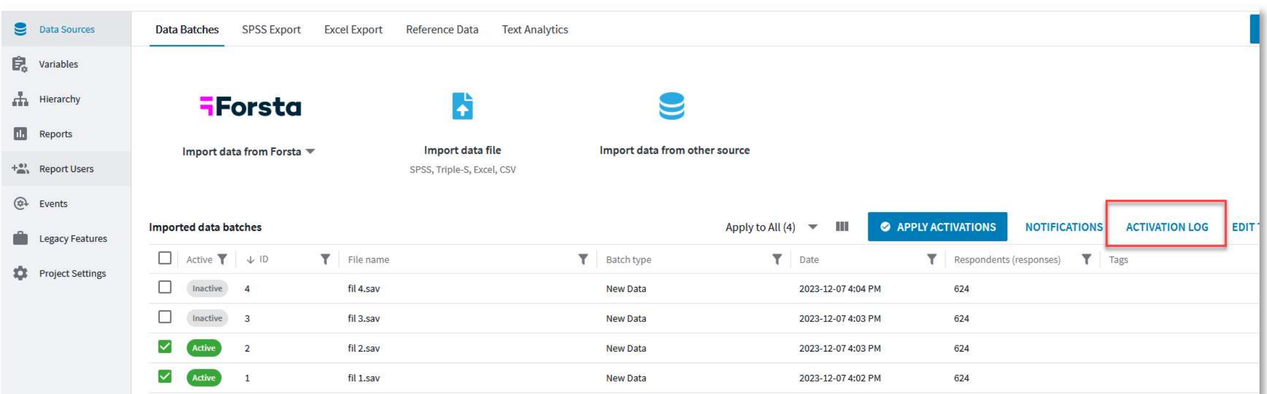
7.1 Data activation log

Monitor the data activation process with the newly introduced Activation log view. This feature provides enhanced visibility into activation times and the status of individual steps, including data import, computing of new variables, data cleaning, and hierarchy updates etc. The log also clearly lists the newly added data batches and those that were removed.

7.1.1 View the log

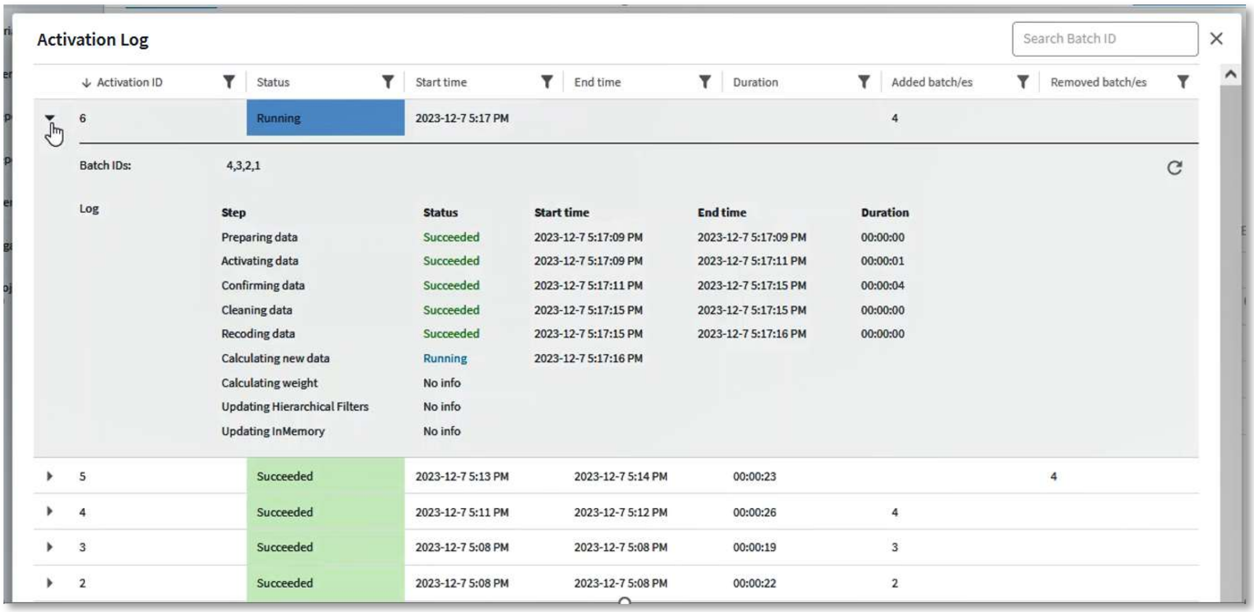
The updated log is visible in the Activation Log menu, replacing the former Activation History view.

Access the log view from here.



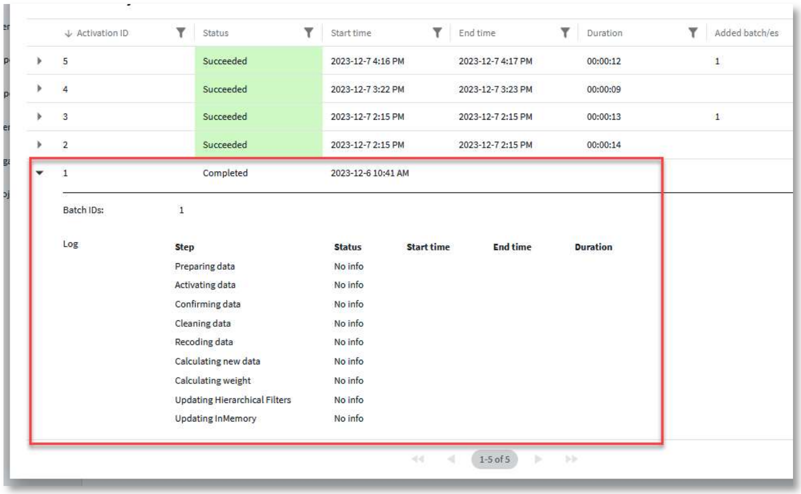
As demonstrated below, the new log defaults to displaying the start time, end time, and total duration of the activation, along with information on batches added and removed. By expanding an activation job, you can view detailed information for each step of the activation process. This includes insights into the status and time spent on tasks such as adding data to computed variables, cleaning data, etc., proving useful for analysis in cases where activation runs for an extended duration.

Example of an expanded log view during an activation.



Tip: In long-running, incomplete activations, check the log to identify the current activation steps in progress. By comparing timings to previous activation instances, you can gain insights into remaining times. Keep in mind that activation time is influenced by factors such as data volumes, the number of computed variables, and server load in shared environments.

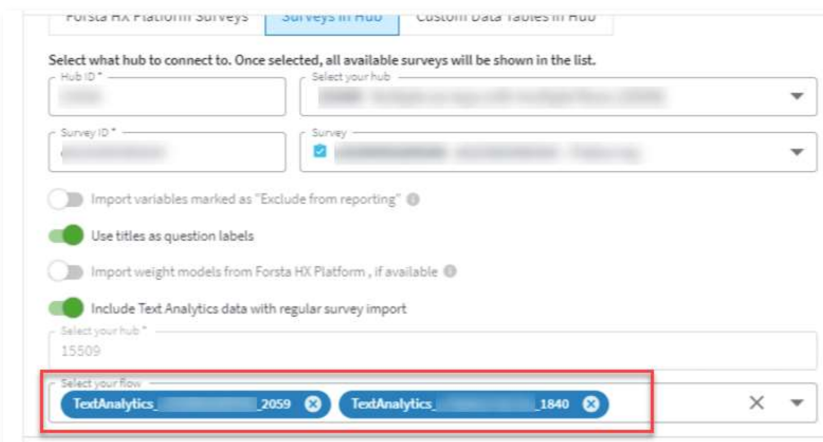
Note: *All historical activations display the old status logic without detailed information, as shown below. The new detailed log is applied to new activation tasks only.*


Activation ID
Status
Start time
End time
Duration
Added batch/es
5
Succeeded
2023-12-7 4:16 PM
2023-12-7 4:17 PM
00:00:12
1
4
Succeeded
2023-12-7 3:22 PM
2023-12-7 3:23 PM
00:00:09
3
Succeeded
2023-12-7 2:15 PM
2023-12-7 2:15 PM
00:00:13
1
2
Succeeded
2023-12-7 2:15 PM
2023-12-7 2:15 PM
00:00:14
1
Completed
2023-12-6 10:41 AM
Batch IDs:
1
Log
Step
Status
Start time
End time
Duration
Preparing data
No info
Activating data
No info
Confirming data
No info
Cleaning data
No info
Recoding data
No info
Calculating new data
No info
Calculating weight
No info
Updating Hierarchical Filters
No info
Updating InMemory
No info
1-5 of 5

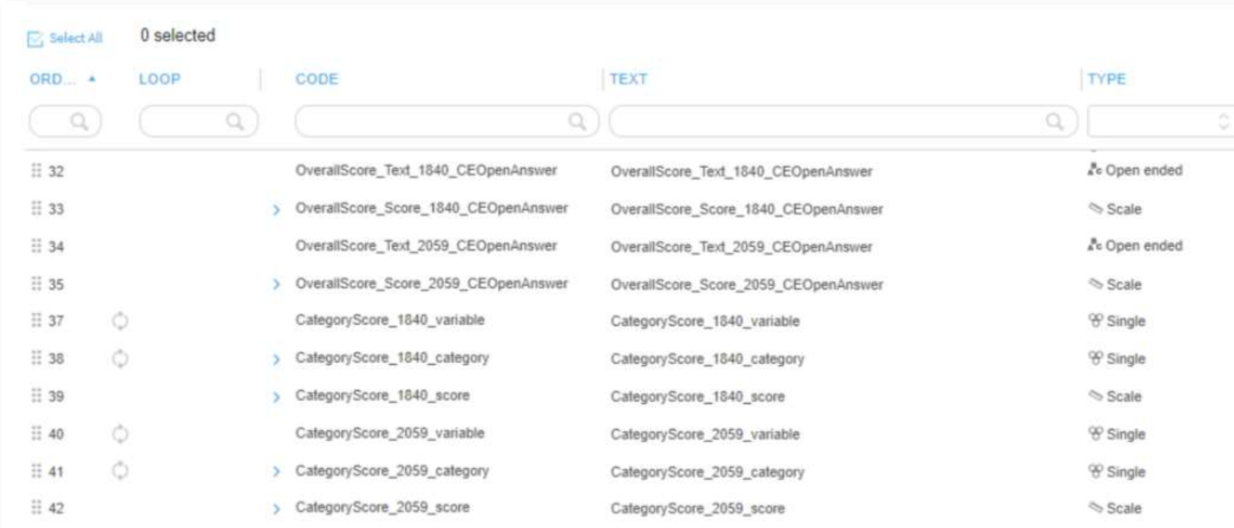
7.2. Importing multiple Text analytics flows from Forsta HX platform

The import process for surveys from the Forsta HX platform now supports Text Analytics data from multiple "Text Analytics flows” instead of just one. This enhancement allows for the analysis of open-ended questions using different models.

The process for importing text analytics remains unchanged, with the added capability to select multiple flows in the flow selection control.



As multiple flows can now be imported, the Text Analytics Flow ID will be included in question codes to distinguish text analytics variables from different flows. See the example below of a project with text analytics variables imported from multiple flows (2059 and 1840).



Select All 0 selected

ORD...	LOOP	CODE	TEXT	TYPE
32		OverallScore_Text_1840_CEOpenAnswer	OverallScore_Text_1840_CEOpenAnswer	Open ended
33		OverallScore_Score_1840_CEOpenAnswer	OverallScore_Score_1840_CEOpenAnswer	Scale
34		OverallScore_Text_2059_CEOpenAnswer	OverallScore_Text_2059_CEOpenAnswer	Open ended
35		OverallScore_Score_2059_CEOpenAnswer	OverallScore_Score_2059_CEOpenAnswer	Scale
37		CategoryScore_1840_variable	CategoryScore_1840_variable	Single
38		CategoryScore_1840_category	CategoryScore_1840_category	Single
39		CategoryScore_1840_score	CategoryScore_1840_score	Scale
40		CategoryScore_2059_variable	CategoryScore_2059_variable	Single
41		CategoryScore_2059_category	CategoryScore_2059_category	Single
42		CategoryScore_2059_score	CategoryScore_2059_score	Scale

***Note:** In existing projects where Text Analytics data is continuously imported, this is a breaking change as flow id are now added into question code. Forsta Visualizations will see these questions as new questions and they will not be merged with the earlier imported data. Consequently, objects displaying the old question will show 'No Data,' requiring updates to reflect the new questions. Utilize our Usage Report on the Question page to identify where these questions are used within the project and facilitate necessary updates.*

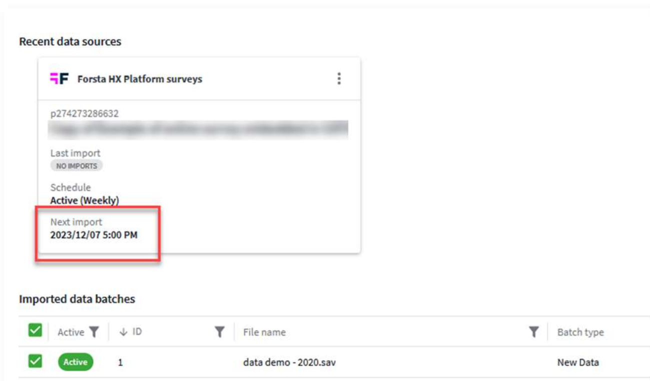
7.3 Ask and Act data integration available in new Import scheduler interface

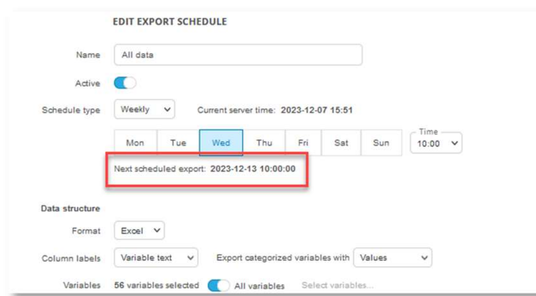
Ask and Act data integration is now available in new Data Import Scheduler page, it was previously only accessible in old import scheduler page.

7.4 Next Import/Export Schedule display

The Export and Import scheduler now display the "next" export/import time, providing improved visibility into upcoming scheduled exports.

Below is an example of an Import scheduled job on the left and an export job on the right. The displayed next time is shown after the scheduled job is saved.

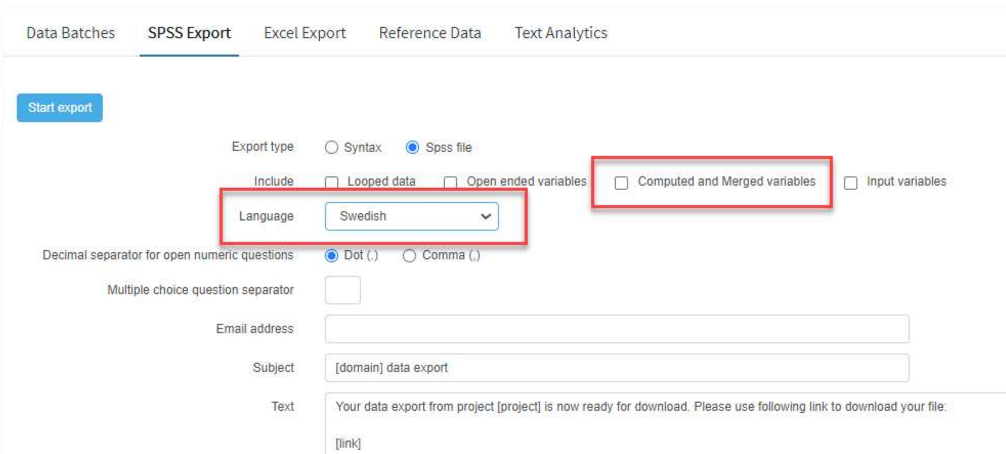




7.5 SPSS export enhancements

The SPSS Export feature has been improved. In multi-language projects, you can now choose the language for exports. Additionally, new options allow you to exclude computed and merged variables from exports, ensuring that the exported data retains the same format as it was originally uploaded to the project.

The new controls on the SPSS export page. The language control is only visible if multiple languages are present.



***Note:** Excluding computed and merged variables from the export also results in the exclusion of weight variables, as they are treated with the same logic as computed variables.*