Dapresy 2020

April Release

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1 – Introduction

This document describes new and improved features in the Dapresy 2020 April Release.

If you would like to know more about these features, please contact Dapresy Global Support at: support@dapresy.com and they will be able to assist you.

Best Regards,

Dapresy Team

Email: support@dapresy.com

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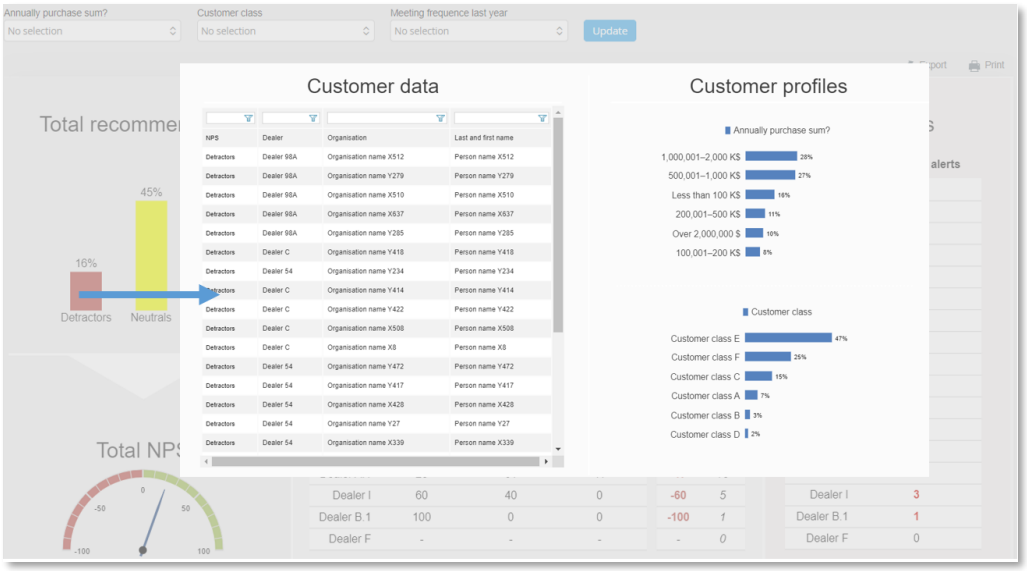
2 - Overview

The Dapresy 2020 April update contains a wide range of improvements in different areas to help you with new functionality and produce with improved efficiency, here is a summary:

New report type; Drilldown report

- The new Drilldown report allows a user to click a datapoint in a StoryTeller chart/table to drill into the details of the respondents behind that data point. The drilldown capability improves portal building with greater flexibility in the flow/navigation and how to interact with the data. The Drilldown report is especially useful in projects where respondent level data is an important part of the reporting, like for example CX projects, where the user can easily drilldown to respondent level details

  Below we see an example dashboard, the user clicks the Detractor column in the chart and the respondents behind that data point are reported in a Drilldown popup. Check this **Video** to see a basic example;



StoryCreator

- "Image" has been added as new object type which allows you to add images to the StoryCreator slides.
- A new "Insert object" option has been added which means you can freely add new charts, tables, text boxes and images to the slide. Previously you could only add new objects by selecting a new layout template or by copy/pasting an existing object.
- Improved object positioning with drag and drop, you can now move an object by clicking on any spot in the object and not only from the "move" icon in top left corner.
- Object alignment controls and object size controls are now available.

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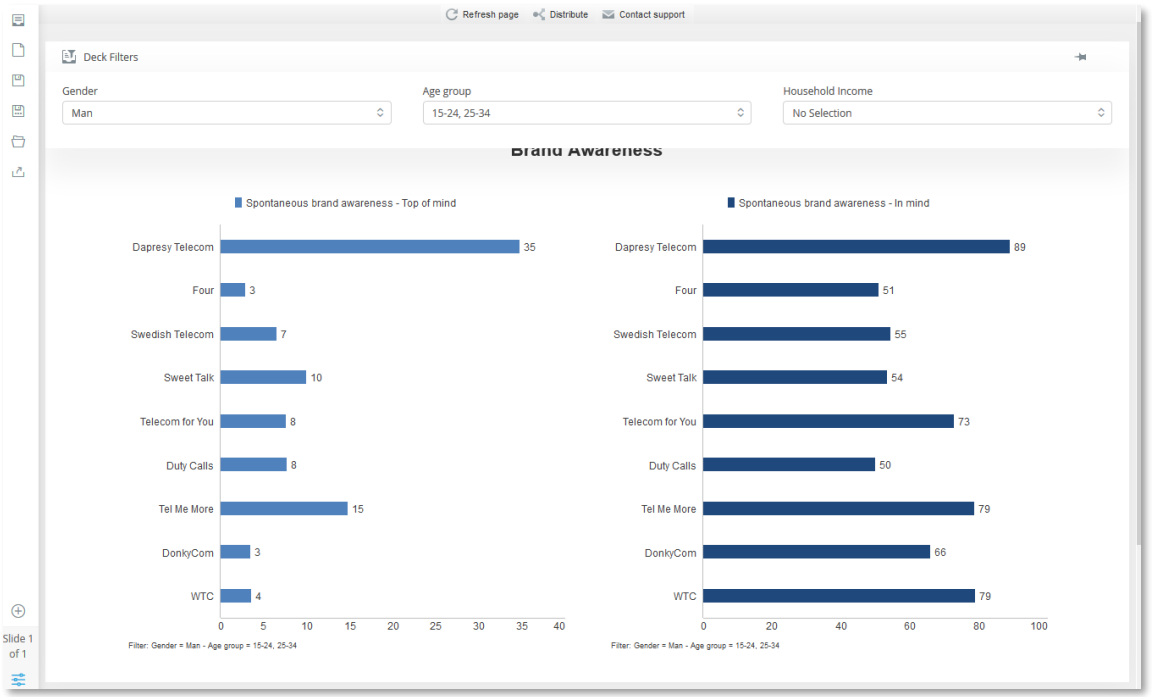
- Deck filtering which allows the users to add interactive filters which filters all the slides in the deck. The interactive deck filters make data exploration easier, also the deck filters are applied in exports so producing reports, with different filters applied, is now more efficient. Below you see an example of deck level filters added to a deck, the presentation view in the StoryCreator is shown in this image.

  The new Deck filtering is currently at a beta stage but you can activate it in your StoryCreators for testing. If you would like to provide feedback and improvement suggestions email wishlist@dapresy.com



StoryTeller

- When applying formatting rules to a table the value can now be replaced with a text or be piped into a text with placeholders.
  As an example you can show a sentence like “Your result is 45%, which is above target” if the value is above the defined target and the following text if the value is below the defined target, “Your result is 45 %, which is below target”. In both these texts the value was piped into the defined text.
- The column header in Respondent tables can now be frozen meaning that the header row always shows when scrolling
- The hierarchical filter comparison rules in charts and tables can now be access right dependent. If a comparison rule is set to be access right dependent, the user sees only the comparison nodes he/she has access to.
  Example, a chart shows the “Selected node” and the “Top group”, if the new setting is applied the user sees only the “Top group” result if he/she has access to the “Top group”, if the new setting is not applied the users see the “Top group” even without access to it.

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- In StoryTeller reports showing a hierarchical filter in a tree view the irrelevant nodes can now be hidden for the users. Previously the complete path was always shown in the tree even if the user had access to a couple of nodes in lowest level only. By applying the new setting, the users see only the nodes and levels in the tree that are relevant based on the access rights.
- When specifying which hierarchical filter nodes are to be shown in a StoryTeller report you can now use an Excel file containing definitions. This is effective in cases where you have to manually pick which nodes to be shown in case of the "quick" options such as "all nodes", "all nodes in a certain level" are not applicable based on special requirements.
- In charts and tables with multiple series the settings "Hide date gaps", "Hide empty series" and "Hide compare series with No data" is now setup per series. Previously these settings were setup in the main series only and the subseries inherited the same setting from the main series.

Variable administration

- A new Usage report has been added where you can view all places a question/answer is used in a project. The Usage report is available from the Questions page.
- A new page for setting up Hierarchical filter connections to Variable subsets has been implemented with the purpose of replacing the existing page with the same functionality but with an improved UI. The new page is more efficient to work in and an Excel download/upload process is now supported allowing a huge number of nodes or Variable subsets to be mapped quickly.

  The new page is in beta stage, all administrator users will get access to the new page in any of the next two upcoming releases. If you would like to use the new page already now for testing and provide feedback, send an email to support@dapresy.com

- A new Variable subset page has been implemented with the purpose of replacing the existing page with the same functionality but with an improved UI. The new page is easier to work in and contains a set of new features such as bulk creation of subsets and auto-selection of brands via smart search logic. A new preparation step allows selection of the questions and answer blocks to be used in any variable subset to streamline the process and to gain maximum efficiency as you don't need to work with the entire set of questions and answer blocks when creating the subsets.
  Also, you can edit which Variable subsets a question/answer is included in from the Questions page which improves efficiency when, for example, a new question has been added to the project.

  The new Variable subset functionality is in beta stage, all the administrator users will get access to the new page in any of the next two upcoming releases. If you would like to use the new page already now and provide feedback, send an email to support@dapresy.com and they will give you access to the new feature.

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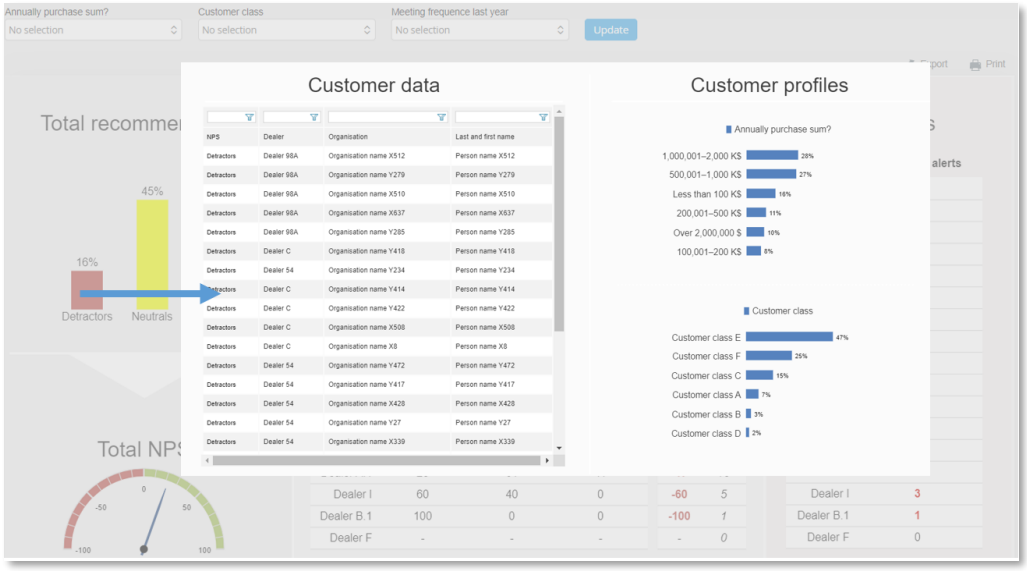
3 Drilldown report

The new Drilldown report allows a user to click a datapoint in a StoryTeller chart/table to drill into the details of the respondents behind that data point. The drilldown capability improves the way of building portals as there is more flexibility in the flow/navigation and how to interact with the data. The Drilldown reports are especially useful in projects where respondent level data is an important part of the reporting, like for example CX projects, where the user easily can drilldown to respondent level details.

The image below shows the concept and flow, the popup is a Drilldown report which has been linked to a chart in a StoryTeller report: when the user clicks the Detractors series in the chart the Drilldown view appears in a popup. All data in the drilldown view is filtered by the respondents behind the clicked data point.

Here we see an example of a Drilldown report appearing in a popup when clicking a chart in a StoryTeller report.



The Drilldown report is nearly identical with the StoryTeller report meaning that the Drilldown report supports the following examples:

- Charts, tables respondent tables, dynamic icons, word clouds
- PPT, PDF and Excel exports
- The Drilldown view can consist of one or many slides
- You can setup links between slides in a Drilldown report to create custom navigation. A Drilldown report can link to another Drilldown report (which becomes opened in a new popup view).

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Below you see what is **not** supported in Drilldown report compared to StoryTeller report:

- Optional filters, Hierarchical filters and Variable subsets cannot be added to a Drilldown report. This is because the data in the Drilldown report is always filtered by the respondents in the data point the user clicked. A chart/table in a Drilldown report can, though, have object level filtering applied.
- Optional chart settings are not available in a Drilldown report
- A slide in a Drilldown report cannot be saved into My Stories
- An object in a Drilldown report cannot link to a regular StoryTeller report or any other reports, though you can link to another Drilldown report, to drill deeper into the data.

Note the following logic applied to data points showing Benchmark calculation result;

- If clicking a data point showing the original result + a benchmark result only the respondents behind the original result are set as the filter in the Drilldown report
- If clicking a data point showing the benchmark result the respondents behind both the originally compared data points are applied as filters in the Drilldown report

Note the following logic applied to data points showing Mean value series or Aggregated series result;

- If clicking a data point showing a Mean value series or an Aggregated series the respondents behind all the ingoing series are used as filter in the Drilldown report

3.1 Setup of Drilldown report and connect to StoryTeller objects

The following steps are followed to add a drilldown view to a data object in the StoryTeller:

1. Add a new Drilldown report to your portal. This is done in the Portal tabs page, see image 1 below
2. Define the content in the Drilldown report. As shown in image 2 below, the setup of the Drilldown report is nearly the identical to the StoryTeller setup.
3. In the StoryTeller report that should link to the Drilldown report, enter the setup view of each object to be linked to the Drilldown report and create the link between the object and the Drilldown report in the Events tab, see image 3 below.

Image 1, here we see how a Drilldown report has been added to a project. A project can have multiple Drilldown reports, a Drilldown report can also have sub-reports like a StoryTeller report.

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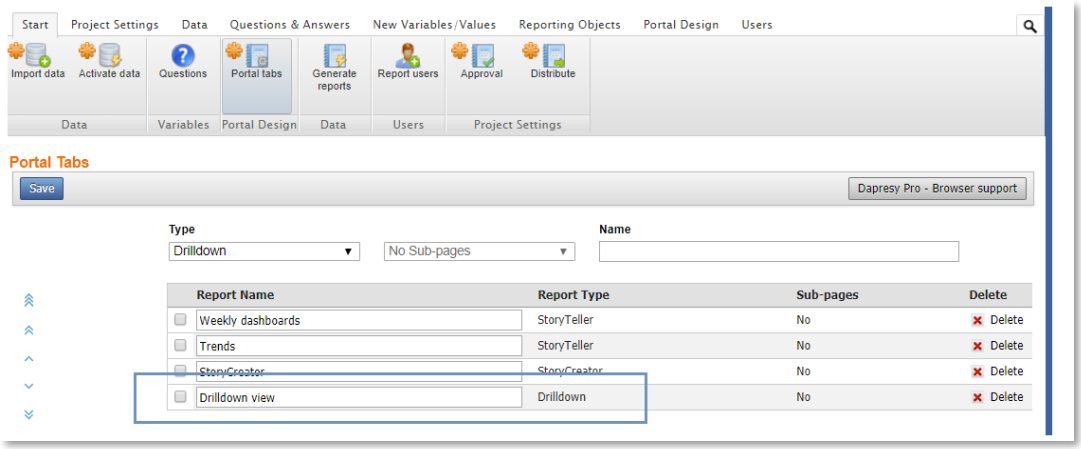

Image 2, here we see the setup of the Drilldown report. It is the same concept as setting up a StoryTeller report.

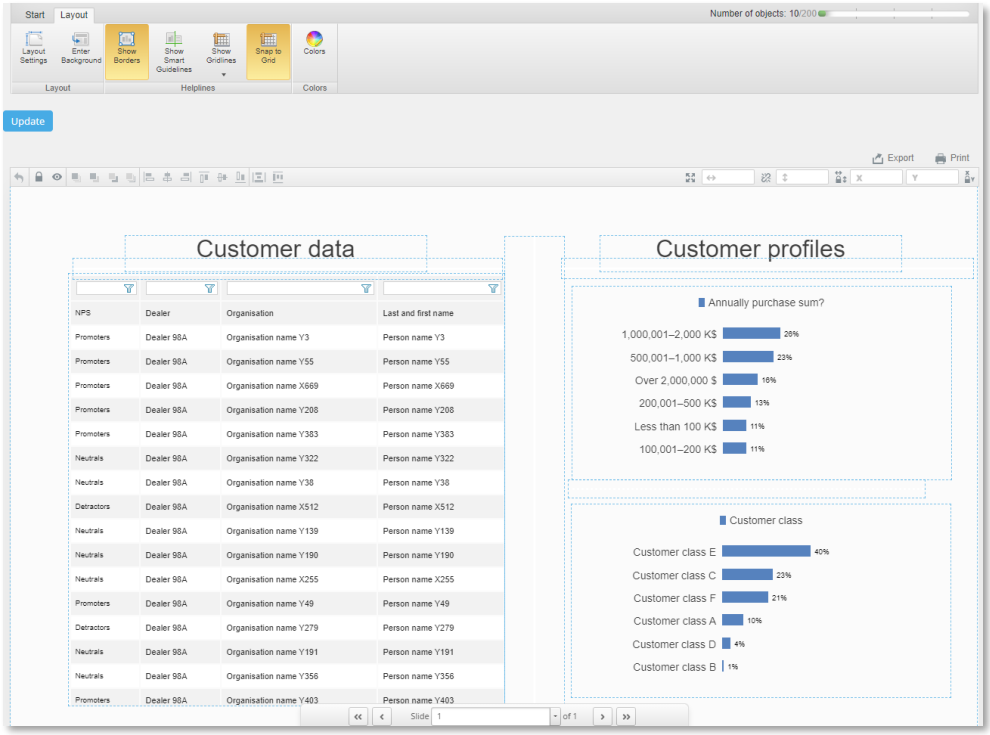

Image 3, here you see how you connect an object in a StoryTeller to a Drilldown report. Select the Drilldown report option in the Link target dropdown list and then the Drilldown report and slide to link to.

Note, the "Drilldown" option is only shown if the project has a Drilldown report with saved content.

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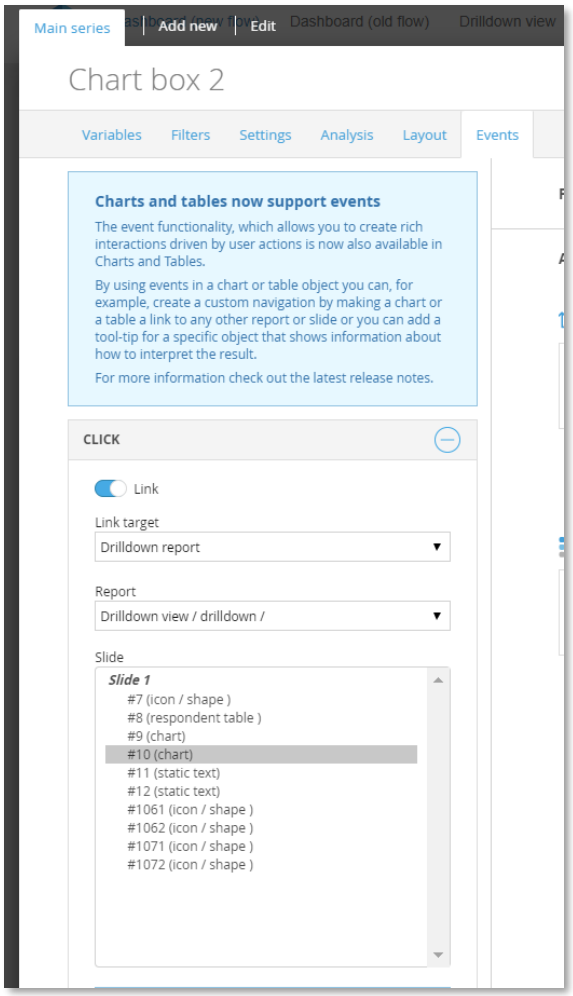

3.2 Access rights

The Drilldown report uses the same access right logic as the Forms report which means that you do not set access right to the Drilldown report itself. The Report users get automatically access to the Drilldown reports if they have access to the relevant StoryTeller linking to the Drilldown report.

Note, the Drilldown report will always display the respondents behind the clicked data point. Hence to support that, do not apply Drilldown links to StoryTeller objects showing data which might potentially be outside the users' applicable access rights.

Example: in a StoryTeller report the Hierarchical filter is used to set access rights and to filter the dashboards. The example chart below shows "Selected node" and "one level up". If a user now has access to Team blue only, the user will anyway be able to see the respondent details behind Unit A1 (the node one level up) if the chart is linked to a Drilldown report. In these use cases you either need to not apply the drilldown capability in the chart or setup two charts instead of one (one for "selected node" and one for "one level up") and apply the drilldown capability to the chart showing the "selected node" only.

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Example chart showing selected node (Team blue) and one level up (Unit A1)

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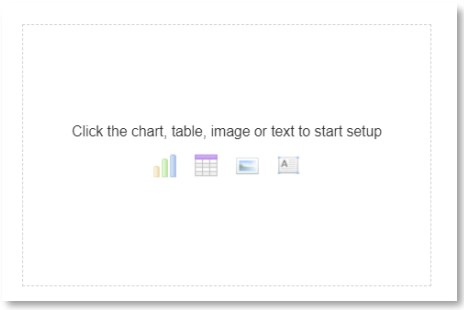
4 StoryCreator

4.1 Image object

A new object type for inserting images has been added to the StoryCreator as shown in the image below. To insert an image to the slide select the object to be an image and browse for the desired image file. .png, .jpg, .jpeg and SVG formats are supported.

Here we see the new image option in an empty StoryCreator object.

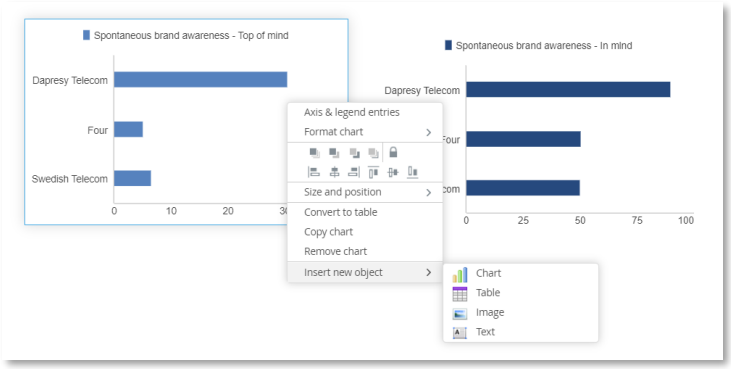


4.2 Insert objects

A new “Insert object” option has been added which allows you to freely add new chats, tables, text boxes and images to the slide. Previously you could only add new objects by selecting a new layout template or by copying/pasting an existing object.

The new Insert option is available in the context menu on right click (see image 1 below) and in the bottom of the slide panel (see image 2 below).

Here we see the new Insert object option in the context menu.



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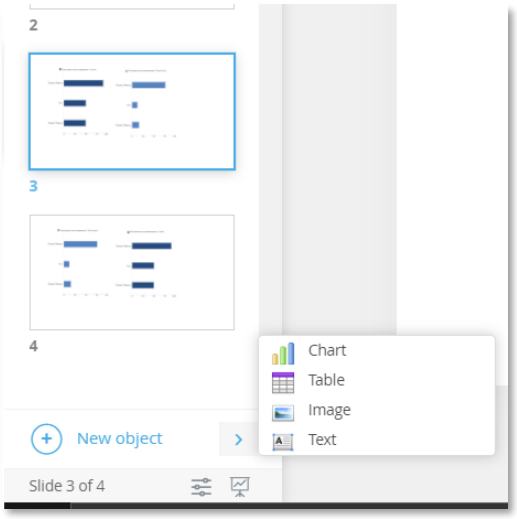
Here we see the new Insert object option in the bottom of the slide menu.

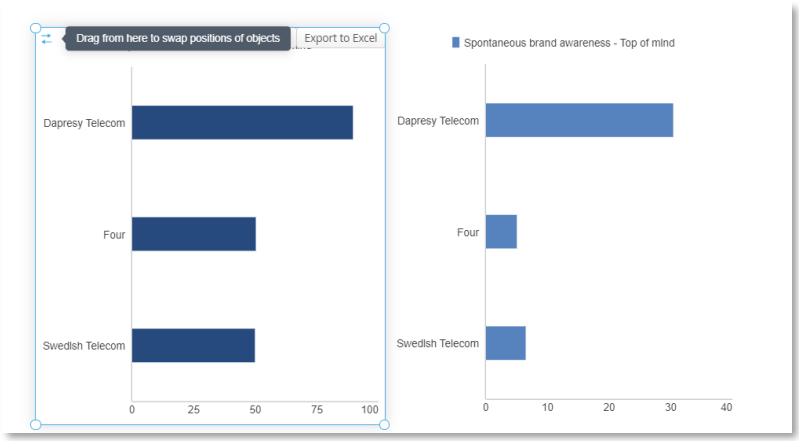


4.3 Improved positioning with drag and drop

You can now move an object with drag and drop from any point in the object and not only from the position icon in top left corner.

The icon in top left corner is still used if you want to switch position of two objects. To switch position of two objects, drag the object from the "switch icon" and drop it above the object to be switched.

Here we see the icon in top left corner, drag from here if you want to switch position of two objects. If you want to move the object you can drag from any position in the object.



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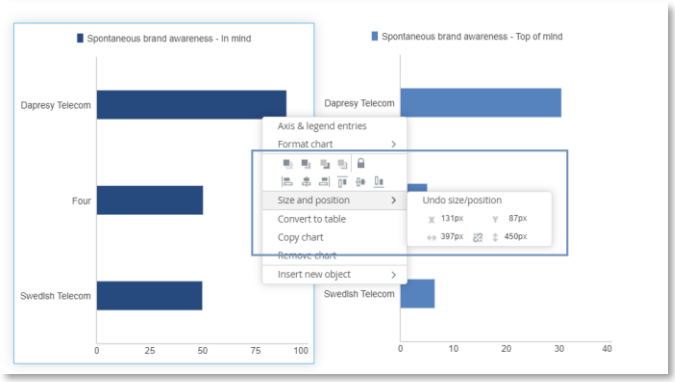
4.4 Object alignment and size controls

Object alignment controls and object size controls are now available in StoryCreator to help with object alignment.

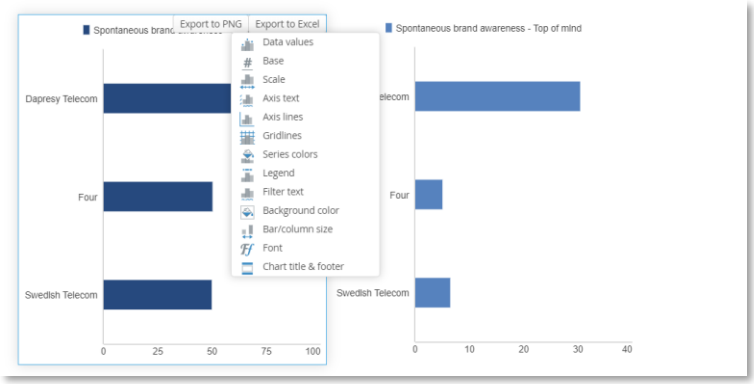
The new controls are available in the context menu as shown in the image below.

Here we see the new alignment controls on the context menu.



Note: the object alignment controls are not shown if the context menu is opened by double clicking on a chart item, in those cases only relevant chart items appears in the context menu.

Here we see the limited context menu appearing on double click on chart, the alignment controls appear on right click only.



4.5 Deck filters - Beta

Deck filtering is now supported which allows the users to add interactive filters which filters all the slides in the deck. The interactive deck filters make data exploration easier, also the deck filters are applied in exports so producing multiple reports, with different filters applied, is now more efficient.

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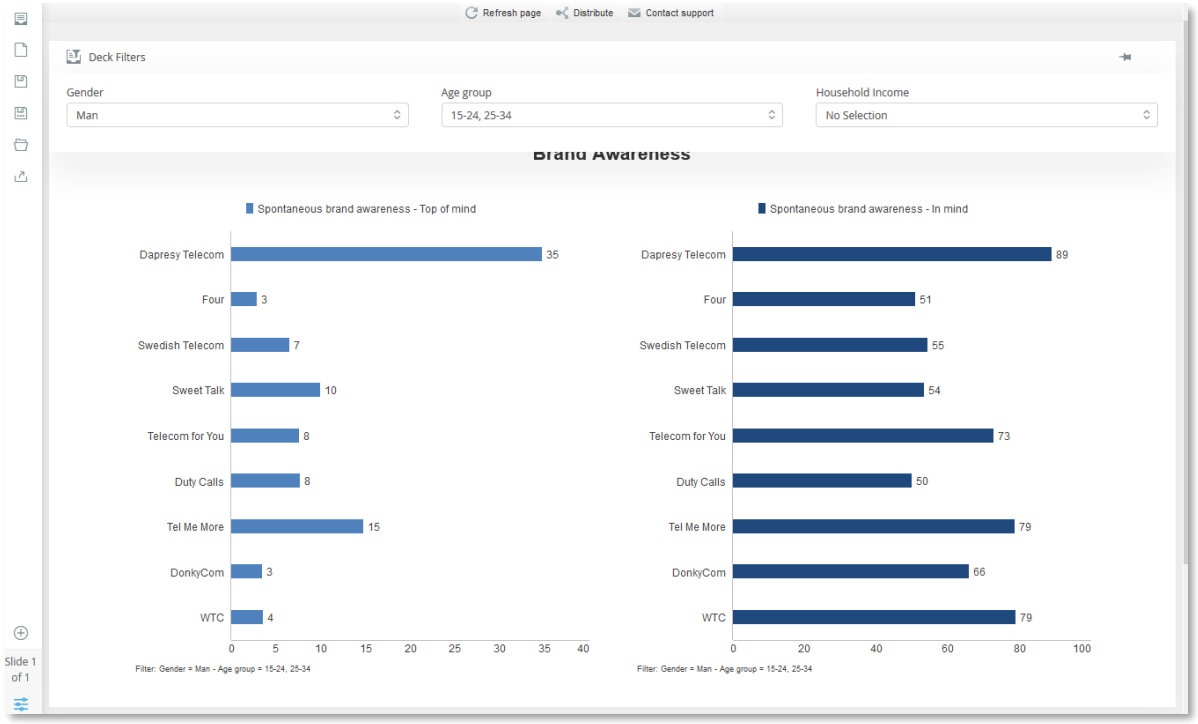
The new Deck filtering is currently at a beta stage but you can activate it in your StoryCreators for testing. If you would like to provide feedback and improvement suggestions email wishlist@dapresy.com

Here we see an example of deck level filters added to a deck at the top of the page, the presentation view of the StoryCreator is shown in this image.



The deck level filters are created by the user per Deck, if saving a Deck the deck level filters are saved as a part of the Deck and loaded automatically next time the same Deck is opened.

4.5.1 Enable the Deck level filters - the Administrator

The Deck filter functionality is turned off by default in both existing and in newly created StoryCreator reports. To enable the Deck filter functionality, enter the StoryCreator Setup page, in the Decks panel tick the setting highlighted in the image below.

Here we see how to enable the Deck filter functionality in a StoryCreator report.

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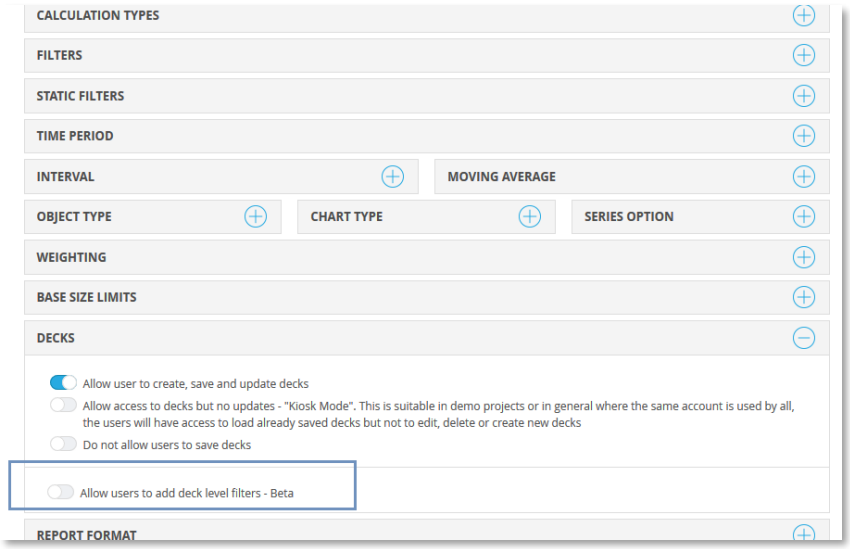

Note, when Deck filters are enabled, all users, both Administrators and Report users, can use the Deck filter functionality.

4.5.2 Using Deck level filters - Report users and Administrators

When Deck filters are enabled in the StoryCreator all users can add and apply deck level filters to a StoryCreator Deck by completing the following;

1. Click the Deck filer area highlighted in image 1 below
2. Select the filters to be used as deck level filters
3. Save

Image 1, here we see where to click to add Deck level filters to a Deck.

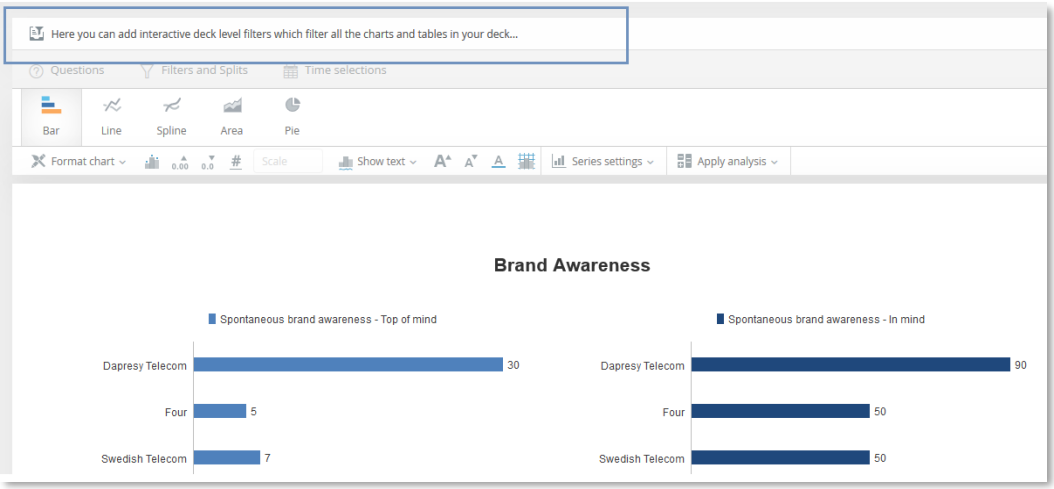

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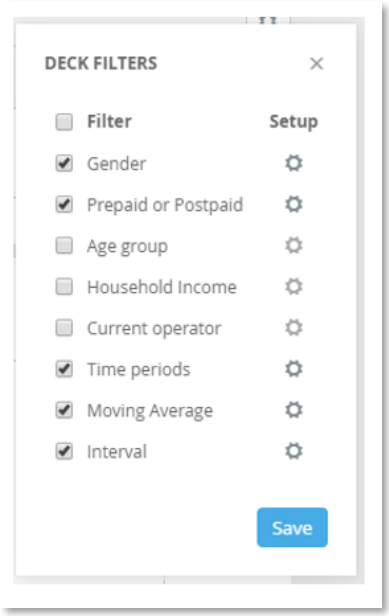
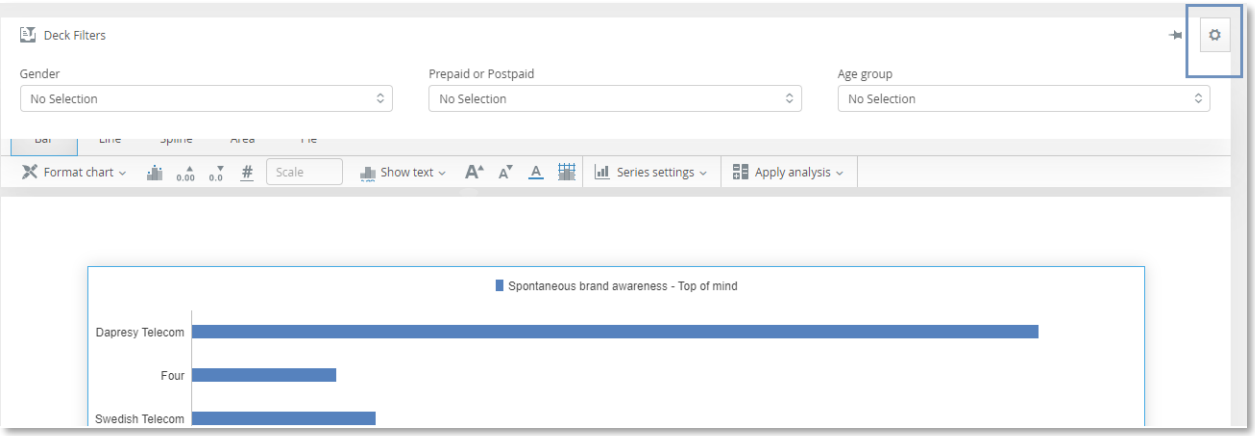
Image 2, here we see the panel appearing for selecting which filters to be used as interactive deck filters.



The deck level filter panel above contains the filters that are available for the user in the current StoryCreator, it also contains the options for interval, moving average and time period as long as these options are defined as available in the current StoryCreator by the administrator.

To change available deck filters after the initial setup click the cogwheel icon in top right corner of the deck filter panel.

Here we see the option to change available filters after the initial setup.



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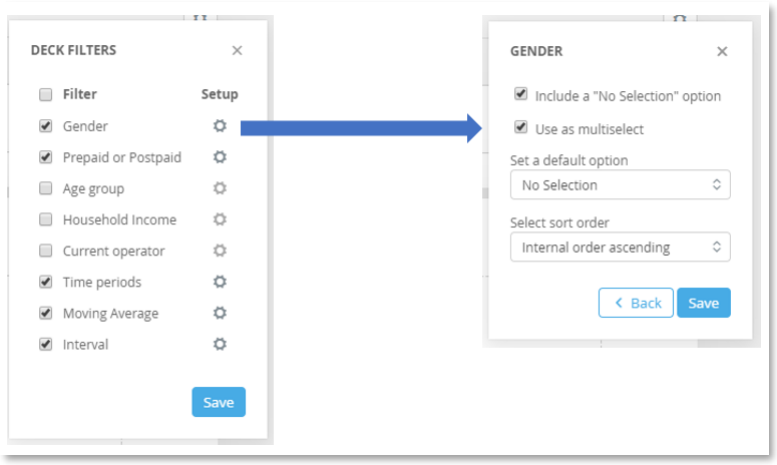
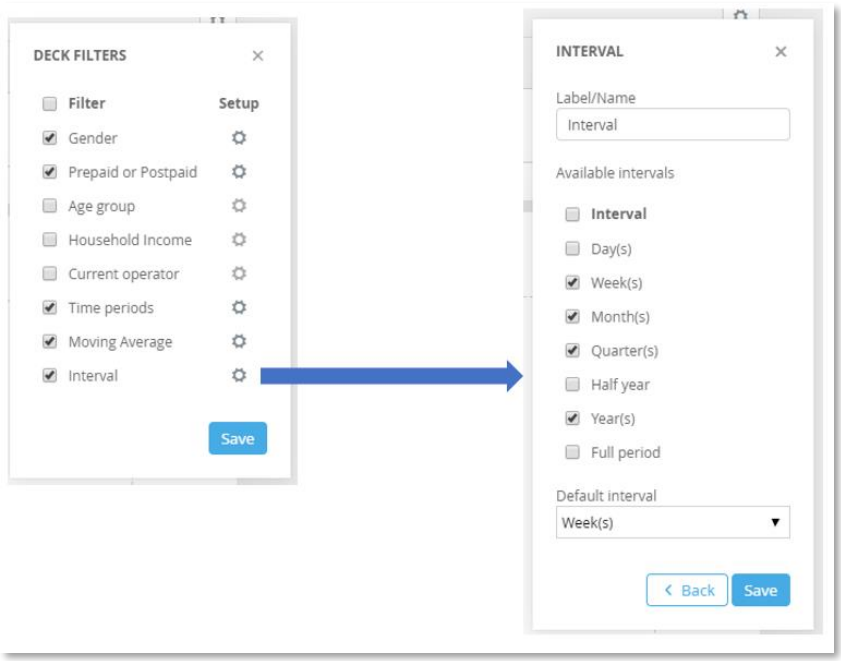
All the added filters are multi selection with a “No selection” option by default. To change from multi select to single select, change sorting in filters or removing the “No selection” option enter the setup menu shown in the image below which has the relevant options.

Here we see the edit panel of a filter.



If Interval is applied as deck filter you can enter the setting to change available intervals as shown in the image below.

Here we see the edit panel of Intervals.



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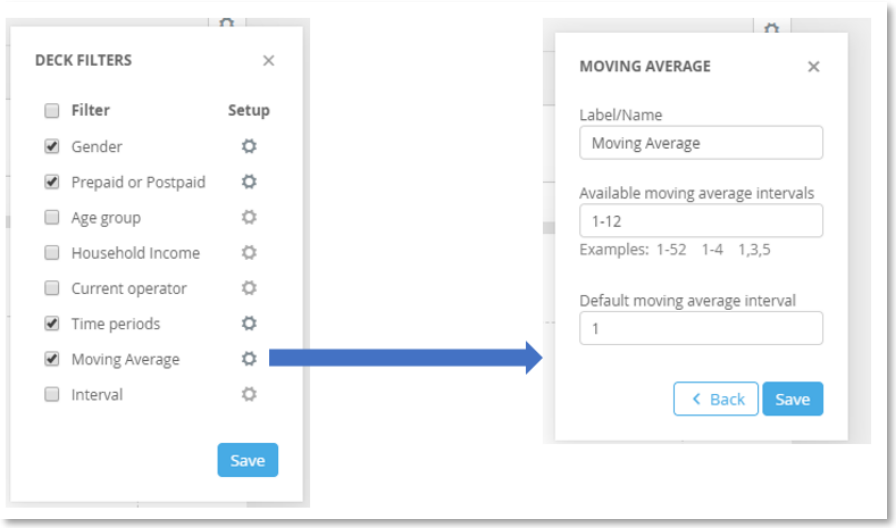
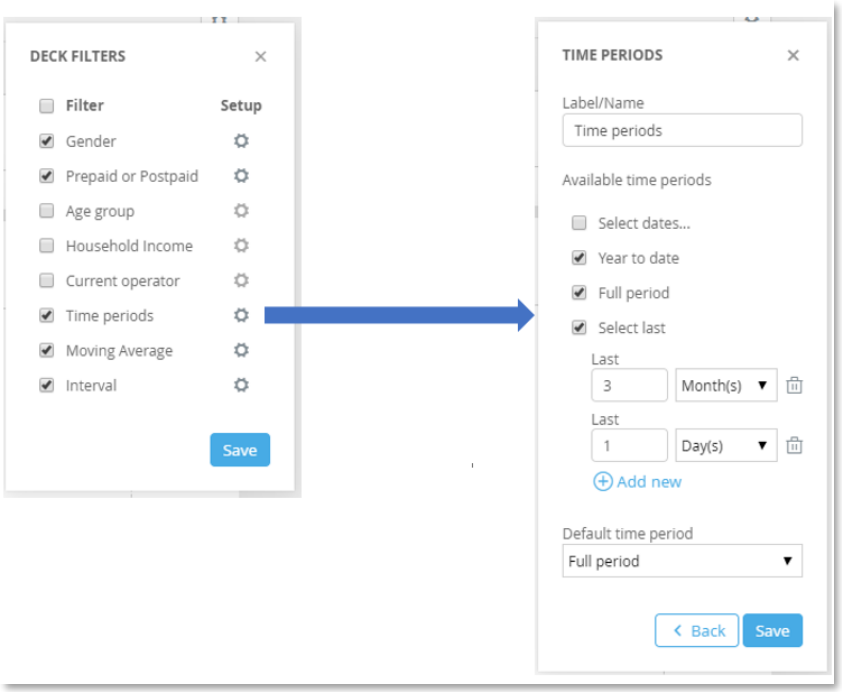
If Moving average is applied as deck filter you can enter the setting to change options as shown in the image below.

Here we see the edit panel of Moving average



If Time periods are applied as deck filter you can enter the setting to change the available options and also add custom time period options such as Last 3 months, Last 1 month etc. as shown in the image below.

Here we see the edit panel of Time periods, to add a custom time period tick the "Select Last" option and define the custom time periods to be added.



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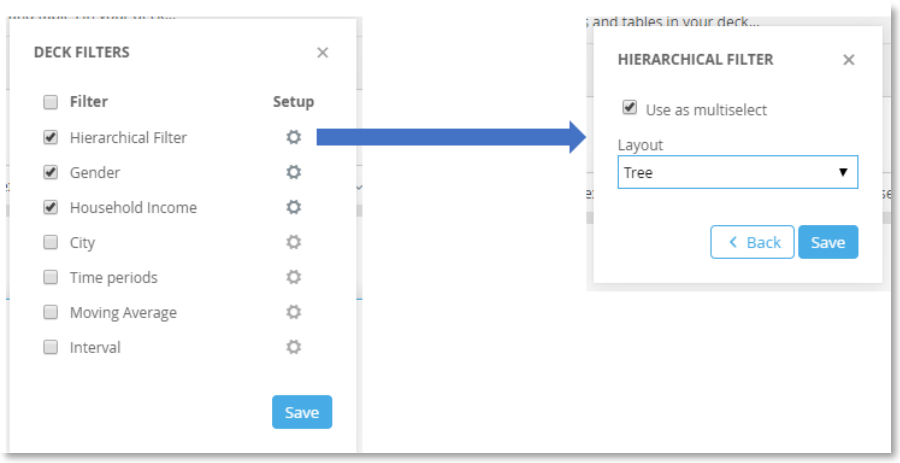
If Hierarchical filter is applied as deck filter you can enter the setting to change the between single and multi selection and also visualization type (tree or dropdown list) as shown in the image below.

Here we see the edit panel of the Hierarchical filters.



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5 StoryTeller improvements

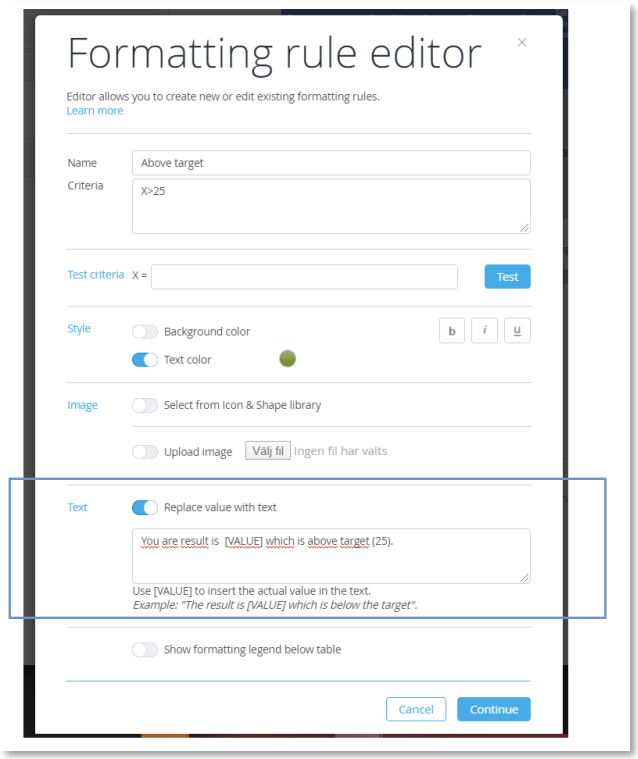
5.1 Tables, text support in Formatting rules

When applying formatting rules to tables in the StoryTeller you can now select to replace the value with a text, or pipe in the value in a text.

The new Text option in Formatting rule setup is shown in the image below. To replace the value with a text enter the text in the input box, to insert the value in the text insert “[VALUE]” where the value should be shown, example: Your result is [VALUE], which is above target result

The format of the text follows the format of the value. You can apply both the Text and the Style option at the same time in a Formatting rule as shown in the example setup below.

Here we see the setup of Formatting rules, the new Text option is highlighted.



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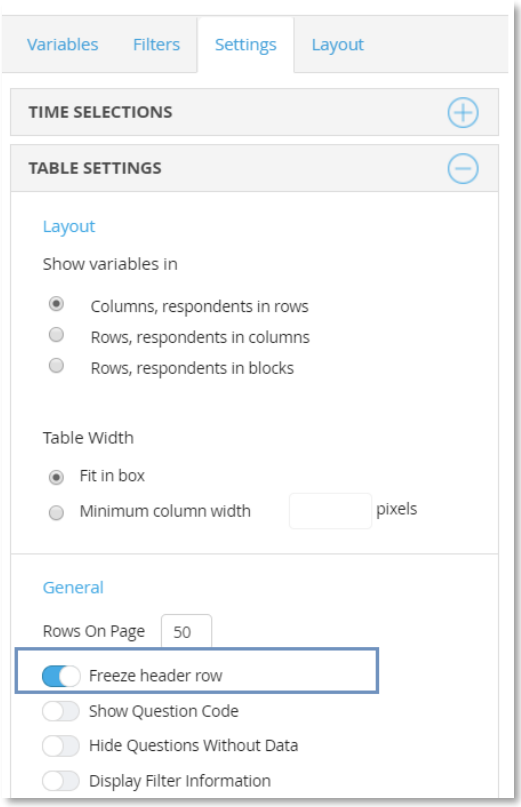
5.2 Freeze column header row in Respondent tables

The column header row in a Respondent table can now be frozen meaning that the header row always is shown when scrolling. To freeze the column header row, enable the new “Freeze header row” option shown in the image below.

Here we see the new setting in the setup of the Respondent table.



5.3 Apply access rights to Hierarchical filter comparison rules

The hierarchical filer comparison rules in charts and tables can now be access right dependent meaning that the user only sees comparison result for the hierarchical filter nodes that the user has access to.

Example, a chart shows the “selected node” and the “top group”, if the new setting is applied the user sees only the “Top group” if he/she has access to the top group, if the new setting is not applied the users sees the “Top group” even without access to it.

Here we see the new option in the setup of the hierarchical filter comparison rules, the new option is not applied by default. With the setup below all users will see the Top group but only the siblings the user has access to.

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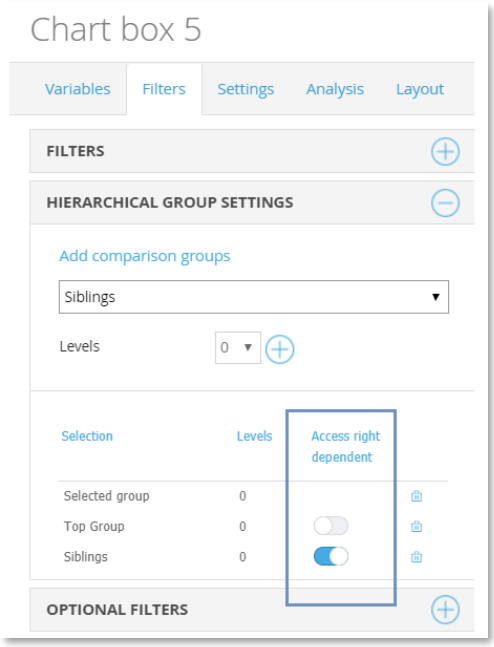
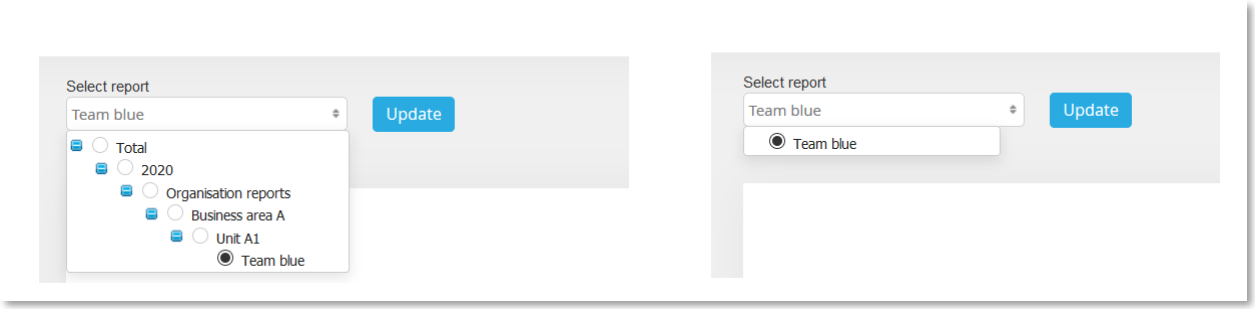


5.4 Hierarchical filter tree, display relevant nodes only

In StoryTeller reports with Hierarchical filters displayed in a tree structure all the levels in the tree are displayed for the user, even if the user does not have access to nodes at all of the levels. An example is shown in the left part in the image below: the user has access to node “Team blue” but the complete path is shown through all levels down to “Team blue”.
A new setting is now hiding higher levels which are not relevant for the users. This makes it easier for the user to find the nodes they have access to. In the right part of the image below you see an example of this setting applied.

Here wee see an example of current logic (left) and the new option (right).



The new option is turned on in the Hierarchical Filter setup as shown in the image below.

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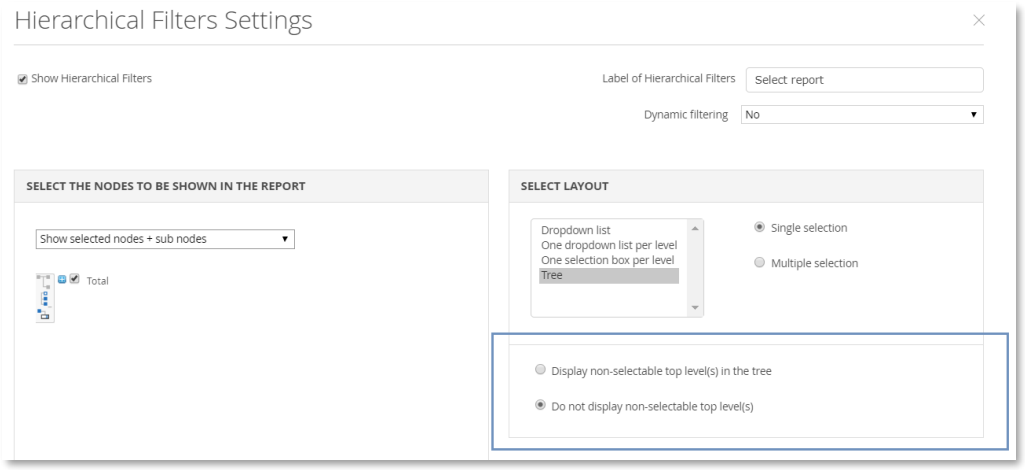
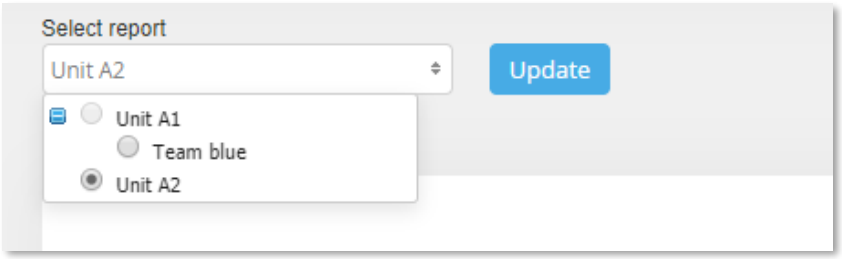
Here we see the new option in the Hierarchical filter setup view.



Note, in some use cases higher level nodes which the user does not have access to must still be shown to prevent a break in the tree node structure. Below we see one of those examples, the user has access to Team blue below Unit A1 and the user has also access to Unit A2, in this scenario Unit A1 shown in the tree but in a style which is not selectable.

Here we see an example were a node must be shown that the user does not have access to.



5.5 Bulk edit of Hierarchical filter settings via Excel upload

When specifying which hierarchical filter nodes to be shown in a StoryTeller report there are quick options such as “all nodes”, “all nodes in specified levels” etc. which is effective to use when applicable. In cases where the quick options cannot be used you must manually select which nodes to be shown which can be time consuming and error prone in bigger projects. For better efficiency, you can now make those definition in an Excel file which is then uploaded to the system.

The new option for downloading an Excel template and loading it back is present in the StoryTeller Hierarchical filter setup page when the option “Show selected nodes” is used, see the image below.

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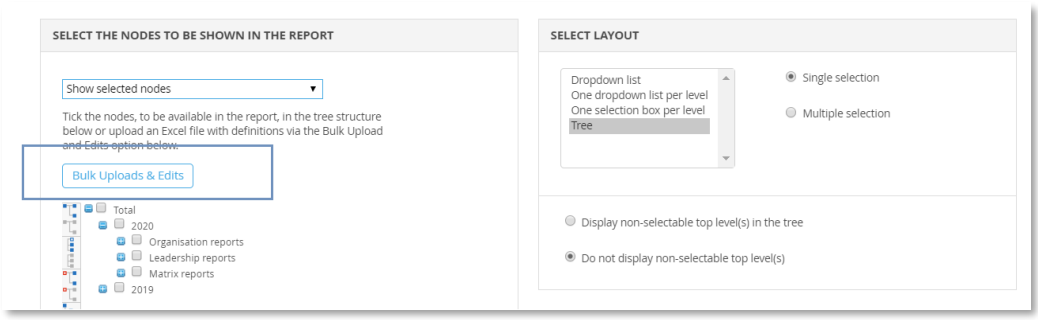
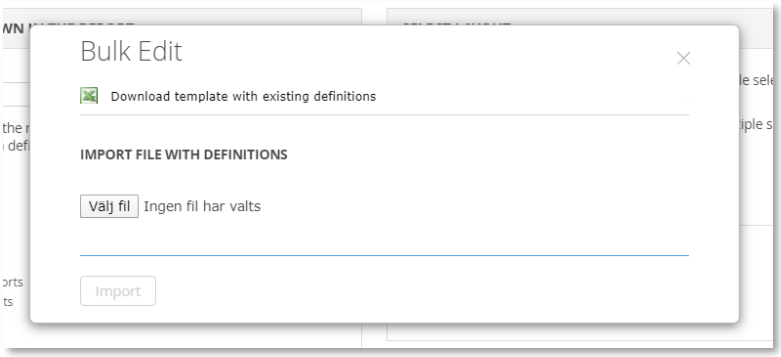
Here we see the option for bulk edits via Excel file.



Here we see the bulk upload view from where you download the Excel template and load it back again.



Here we see the Excel template, in column E you specify if the node should be shown or not in the current report.

	A	B	C	D	E
1	HFilterID	Path	Name	Code	Shown/not shown
2	1	Total	Total	HTotal	Shown
3	313	Total -> 2020	2020	year2	Shown
4	315	Total -> 2020 -> Organisation reports	Organisation reports	year2Organisation1	Shown
5	352	Total -> 2020 -> Organisation reports -> Business area A	Business area A	year2Organisation1level 11	Shown
6	357	Total -> 2020 -> Organisation reports -> Business area A -> Unit A1	Unit A1	year2Organisation1level 11level 21	Shown
7	366	Total -> 2020 -> Organisation reports -> Business area A -> Unit A1 -> Team blue	Team blue	year2Organisation1level 11level 21level 33	Shown
8	367	Total -> 2020 -> Organisation reports -> Business area A -> Unit A1 -> Team dark green	Team dark green	year2Organisation1level 11level 21level 38	Shown
9	368	Total -> 2020 -> Organisation reports -> Business area A -> Unit A1 -> Team light green	Team light green	year2Organisation1level 11level 21level 311	Shown
10	369	Total -> 2020 -> Organisation reports -> Business area A -> Unit A1 -> Team red	Team red	year2Organisation1level 11level 21level 315	Shown
11	358	Total -> 2020 -> Organisation reports -> Business area A -> Unit A2	Unit A2	year2Organisation1level 11level 22	Shown
12	370	Total -> 2020 -> Organisation reports -> Business area A -> Unit A2 -> Team cloud	Team cloud	year2Organisation1level 11level 22level 34	Not shown
13	371	Total -> 2020 -> Organisation reports -> Business area A -> Unit A2 -> Team sun	Team sun	year2Organisation1level 11level 22level 317	Not shown
14	353	Total -> 2020 -> Organisation reports -> Business area B	Business area B	year2Organisation1level 12	Shown
15	359	Total -> 2020 -> Organisation reports -> Business area B -> Unit B1	Unit B1	year2Organisation1level 12level 23	Shown

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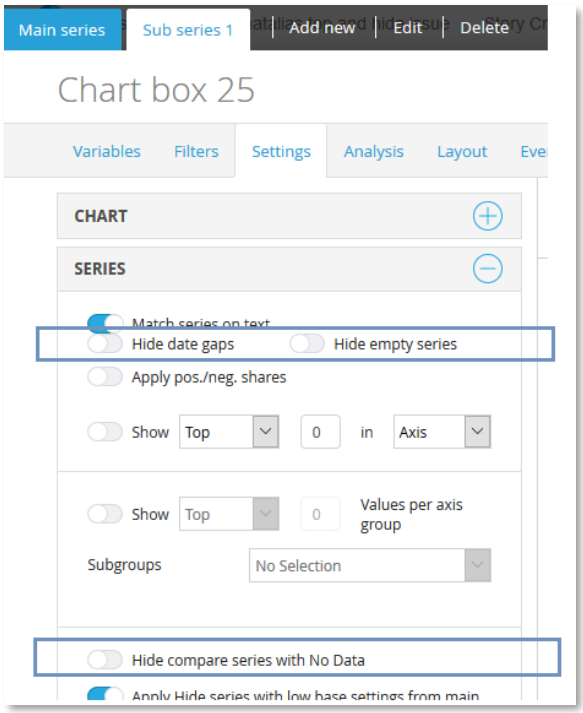
5.6 Charts and tables -“Hide date gaps”, Hide empty series” and “Hide compare series with No data” – now a setting per series

In charts and tables with multiple series the settings “Hide date gaps”, “Hide empty series” and “Hide compare series with No data” is now setup per series. Previously these settings were setup in the main series only, the subseries did inherit the setting from the main series.

Here we see how the new settings in the subseries of a chart.



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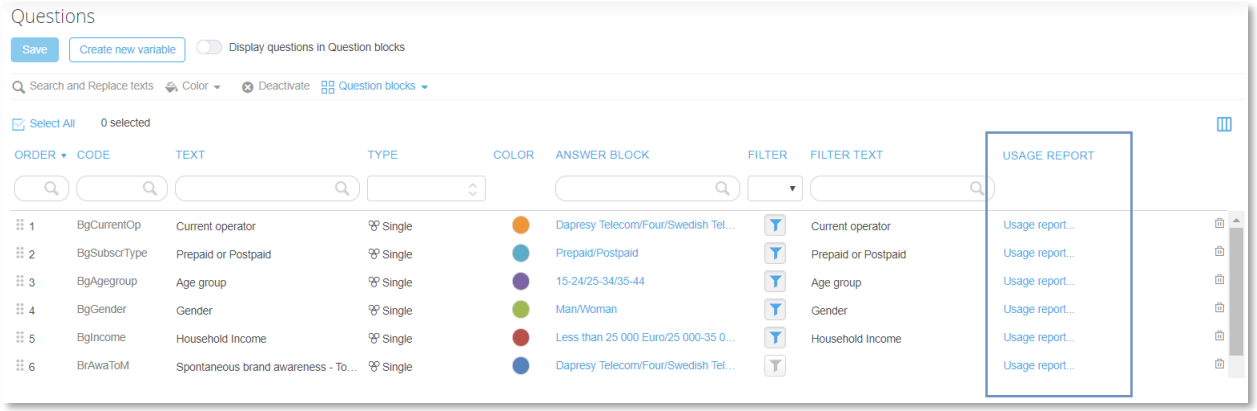
6 Variable administration

6.1 Usage report

A new “usage report” is available where you can see all places a question/answer is used in a project. The usage report is available in the Questions page via a new column named Usage report, the column is hidden by default, so you need to enable the column to enter the usage report of a question/answer.

Here we see the new Usage report column, it is available in both the Question list and in the Answer block list.



Here we see a typical example of a usage report, as shown the question Gender is used as Filter, in a few StoryTeller objects and in the expression of a computed variable.

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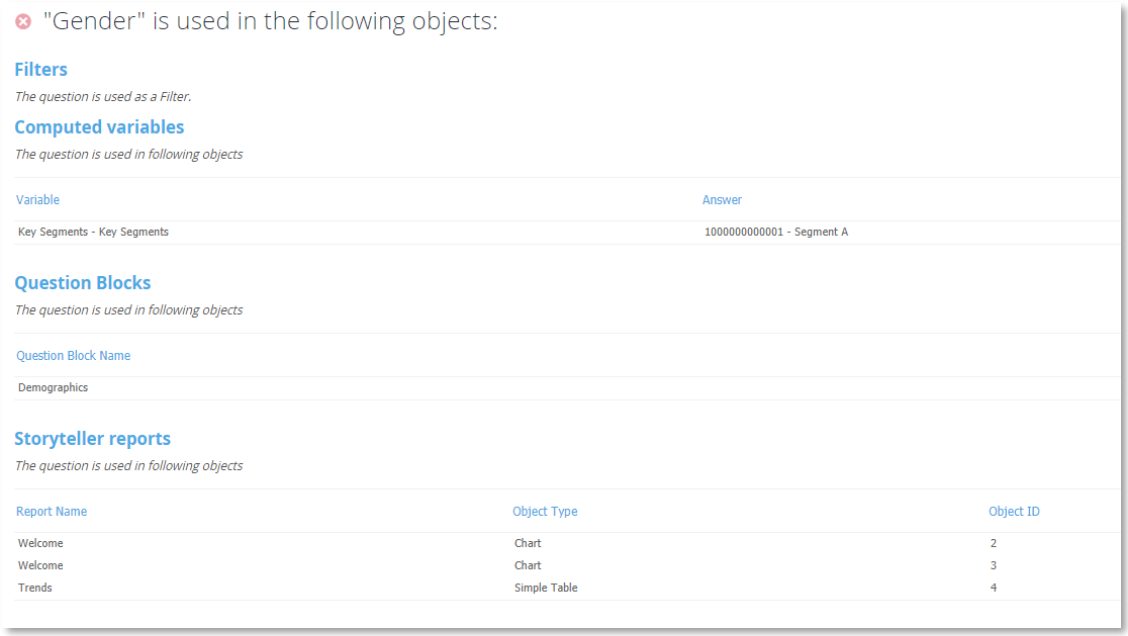

"Gender" is used in the following objects:

Filters

The question is used as a Filter.

Computed variables

The question is used in following objects

Variable	Answer
Key Segments - Key Segments	1000000000001 - Segment A

Question Blocks

The question is used in following objects

Question Block Name
Demographics

Storyteller reports

The question is used in following objects

Report Name	Object Type	Object ID
Welcome	Chart	2
Welcome	Chart	3
Trends	Simple Table	4

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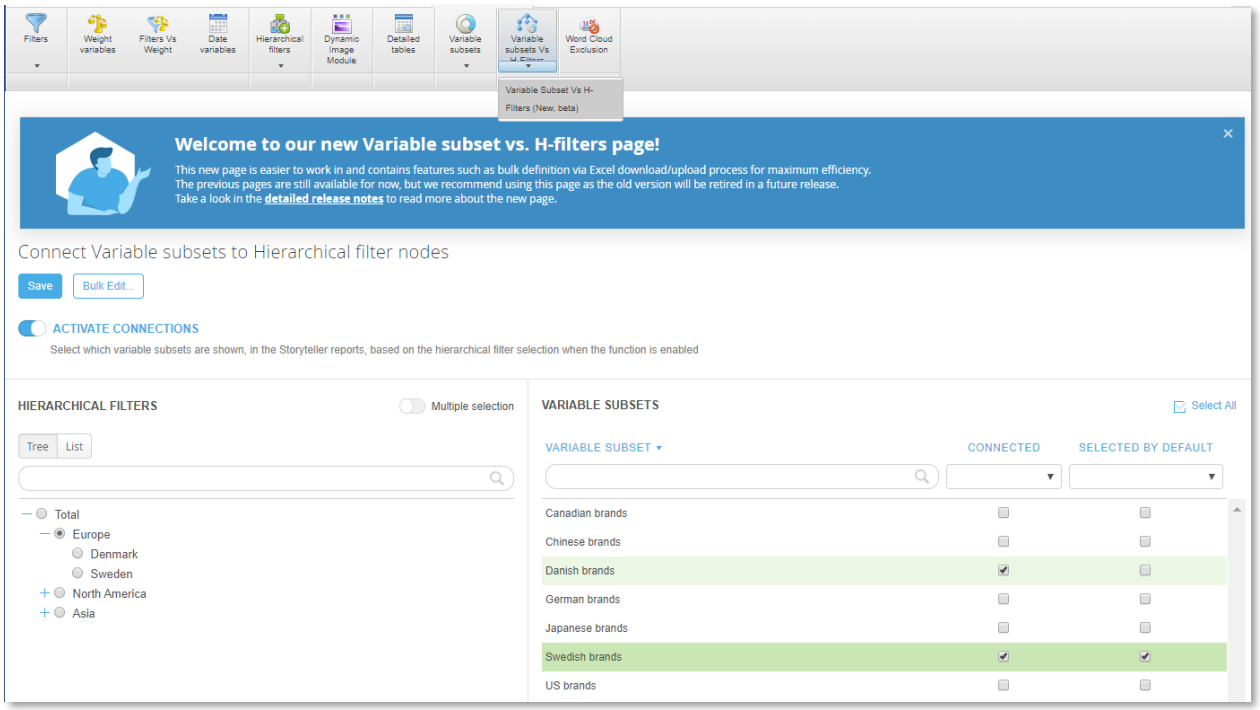
6.2 New Hierarchical filter vs Variable subset page - beta

A new page for setting up Hierarchical filter connections to Variable subsets has been implemented with the purpose to replace the existing page with a great new user experience. The new page is much more efficient to work in and an Excel download/upload process is also supported when there is an exceptionally large number of nodes or Variable subsets to be mapped.

The new page is in beta stage, all administrator users will get access to the new page in any of the next two upcoming releases. If you would like to use the new page already now for testing and provide feedback, send an email to support@dapresy.com

The new page is currently a sub-page to the old page in the navigation menu as shown in the image below. The concept of the page is the same as before meaning you connect one or several Variable subsets to each hierarchical filter node, you can also set a Variable subset to be default selected.

Here we see the new page.



6.2.1 Setup via user interface

To setup the connections between Hierarchical filter nodes and Variable subsets, via the user interface, do the following:

1. Select the node in the hierarchical filter tree
2. Select the subsets to be connected by ticking “Connect” or “Selected by default” in the grid to the right

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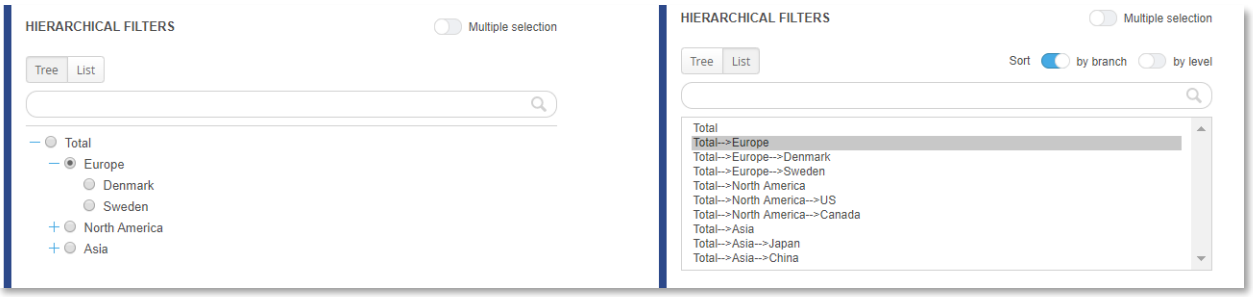
3. Repeat step 1 and 2 for all the nodes to be connected to Variable subsets
4. Save

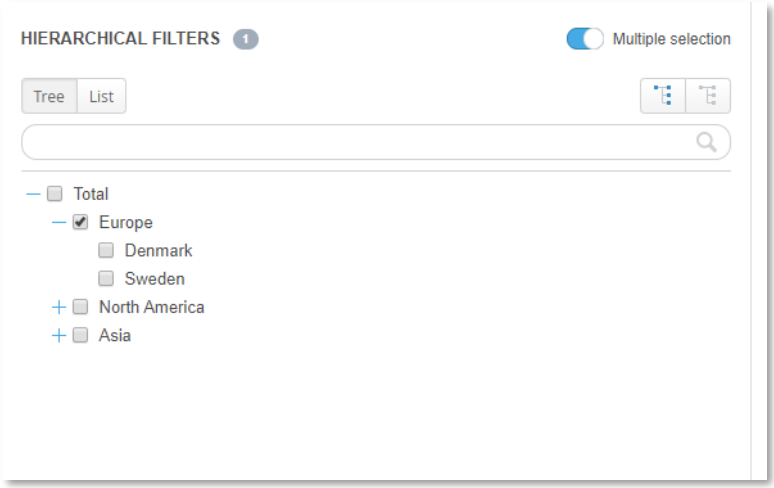
Tip 1, the Hierarchical filters can be shown in either a tree view or as a list view as shown in the images below. When using the list view you can also select if the nodes should be sorted by level or by branch.

Here we see an example of the tree view to the left and an example the list view to the right.



Tip 2, if multiple hierarchical filter nodes should be connected to the same Variable subsets you can enable the multi selection support in the hierarchical filter selection. Though, use this option with care as it is easy to overwrite wrong nodes if you forget to untick all the nodes when you are going to select a new set of nodes.

Here we see how multiple selection has been enabled, the option to enable multiple selections is present in top right corner in the image below.



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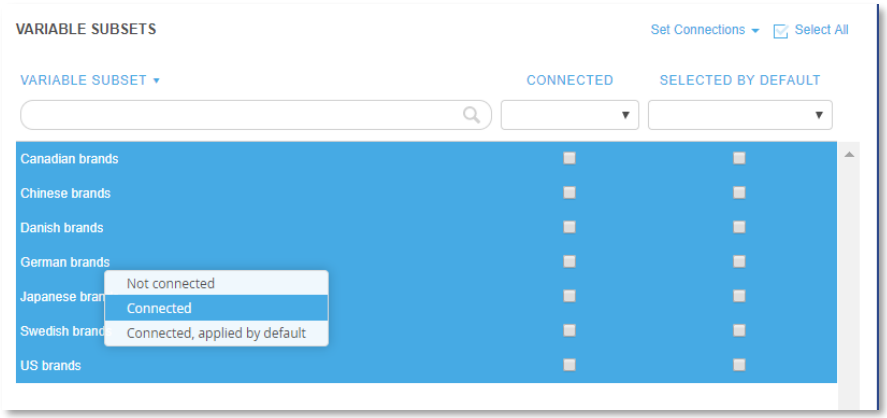
Tip 3, you can right click in the Variable subset grid to get a context menu from where you can apply bulk updates, the selected option is applied to all selected Variable subsets.

Here we see the context menu used to apply same setting to all selected Variable subsets.



6.2.2 Setup via Excel download/upload

To make new connections, or edit existing connections, in an Excel file:

1. Enter the “Bulk edit” view
2. Download the Excel template
3. Edit the connections in the Excel file
4. Upload the file

Here we see how to enter the Bulk Edit view.

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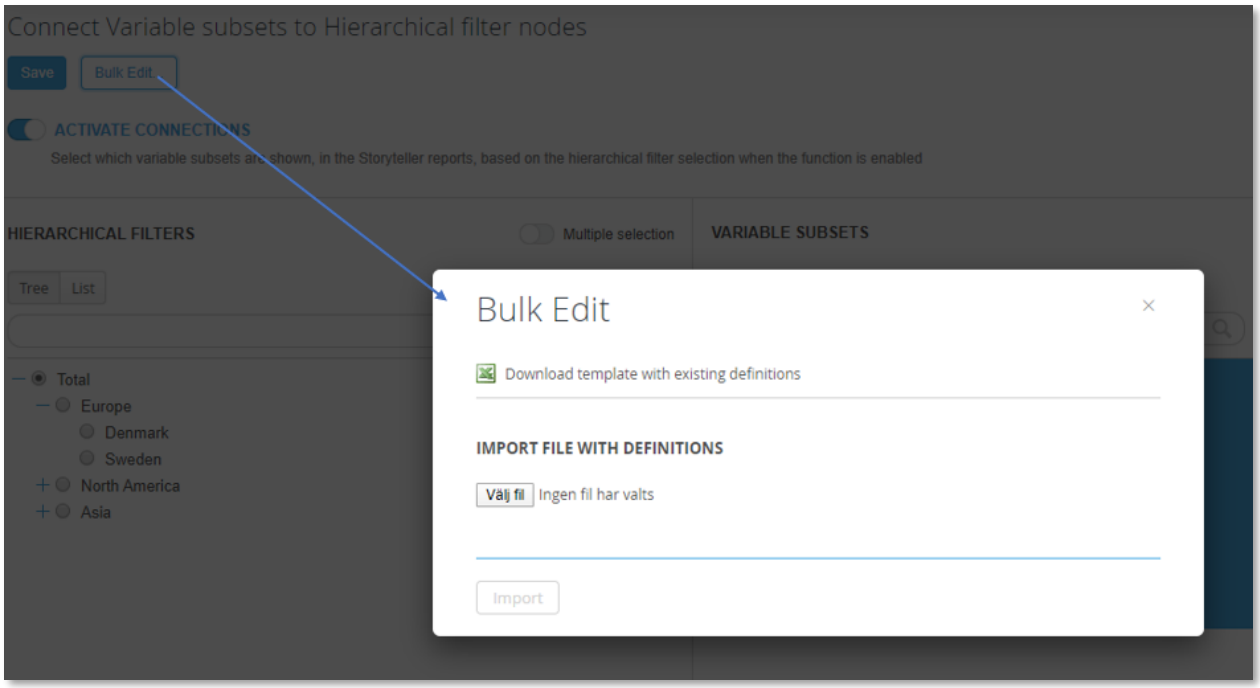

Here we see the downloaded Excel file. For each hierarchical filter node you specify which Variable subsets to be connected and if any Variable subset should be selected by default.

	A	B	C	D	E	F	G	H	I
1	Hierarchical Filters				Variable Subsets				
2	HFilterID	Path	Code	Name	VS10 - Chinese brands	VS11 - German brands	VS12 - Japanese brands	VS13 - Swedish brands	VS14 - US
3	1	Total	HTotal	Total	Not connected	Not connected	Not connected	Not connected	Not connecte
4	19	Total-->Europe	Continent1	Europe	Not connected	Not connected	Not connected	Connected	Not connecte
5	22	Total-->Europe-->Denmark	Continent1Country1	Denmark	Not connected	Not connected	Not connected	Not connected	Not connecte
6	23	Total-->Europe-->Sweden	Continent1Country2	Sweden	Not connected	Not connected	Not connected	Connected	Not connecte
7	20	Total-->North America	Continent2	North America	Not connected	Not connected	Not connected	Not connected	Connected
8	24	Total-->North America-->US	Continent2Country3	US	Not connected	Not connected	Not connected	Not connected	Connected
9	25	Total-->North America-->Canada	Continent2Country4	Canada	Not connected	Not connected	Not connected	Not connected	Not connecte
10	21	Total-->Asia	Continent3	Asia	Connected	Not connected	Connected	Not connected	Not connecte
11	26	Total-->Asia-->Japan	Continent3Country5	Japan	Not connected	Not connected	Connected	Not connected	Not connecte
12	27	Total-->Asia-->China	Continent3Country6	China	Connected	Not connected	Not connected	Not connected	Not connecte

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6.3 New Variable subset page - beta

A new Variable subset page has been implemented with the purpose of replacing the existing page with the same functionality but with an improved UI. The new page is easier to work in and contains a set of new features such as bulk creation of subsets and auto-selection of brands via smart search logic. A new preparation step allows selection of the questions and answer blocks to be used in any variable subset to streamline the process and to gain maximum efficiency as you don't need to work with the entire set of questions and answer blocks when creating the subsets.
Also, you can now edit which Variable subsets a question/answer is included in from the Questions page which improves efficiency when, for example, a new question has been added to the project.

The new Variable subset functionality is in beta stage, all the administrator users will get access to the new page in any of the next two upcoming releases. If you would like to use the new page already now and provide feedback, send an email to support@dapresy.com and they will give you access to the new feature.

6.3.1 New flow

When creating a Variable subset in the **old** page you work with the entire set of question and answer blocks even if only parts of the questions/answer blocks should be affected by the Variable subset filtering in the reports.
In, for example, a brand tracker survey where you create a Variable subset for each brand you need to include all the questions/answers of the current brand but also all the non-brand related questions such as Age, Gender etc. in each subset. If these non-brand related questions are not included, they will not be shown in the reports.

In the **new** page, a new "Variable subset definition" step has been introduced where you first specify which questions and answer blocks to be affected by the Variable subset filtering. If we use the example from above where one Variable Subset is created for each brand, you will now, in the Variable subset definition step, select the brand related questions and answer blocks only, so, in the next step when creating a Variable subset you work with this smaller set of questions and answers only, which makes it easier to create subsets.

The image below demonstrates the difference in the old and new flow. At the top we see the old flow, you work with the entire set of questions and answer blocks when setting up a Variable subset. In the bottom you see the new flow, in the preparation step you specify which questions and answer blocks to be affected by the variable subset filtering and then you work with this smaller set when creating each subset.

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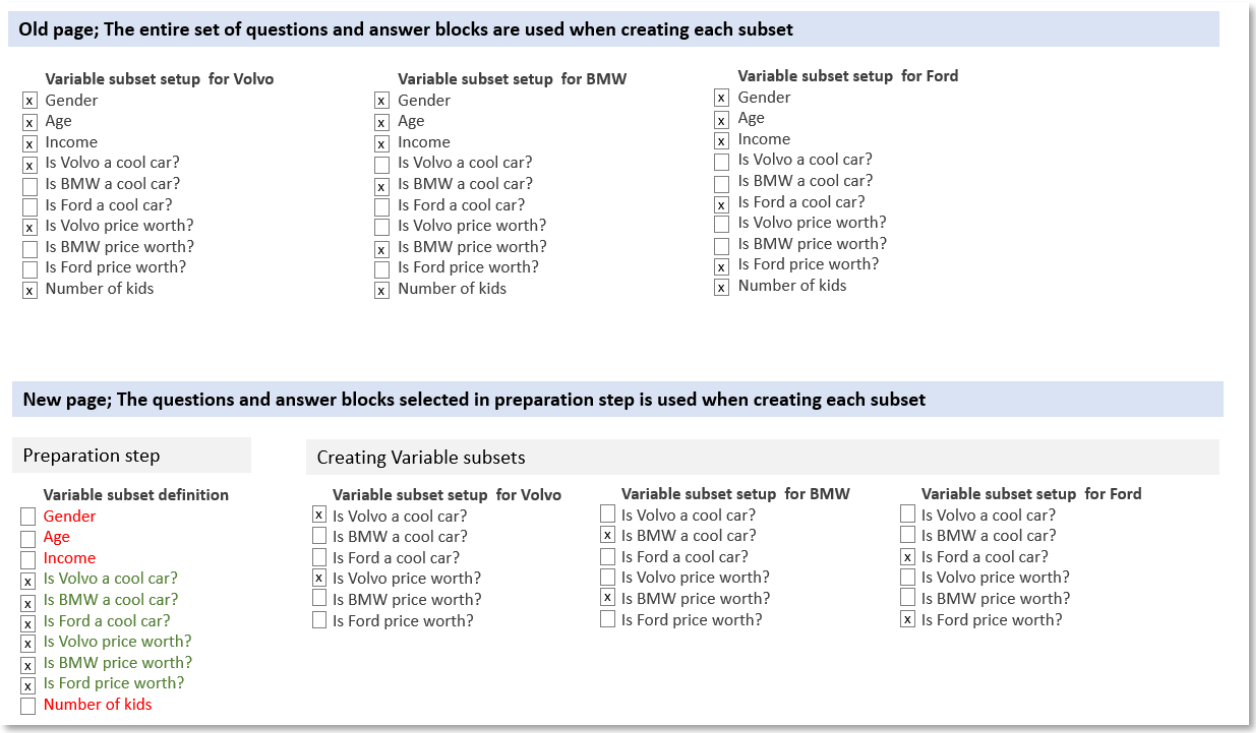
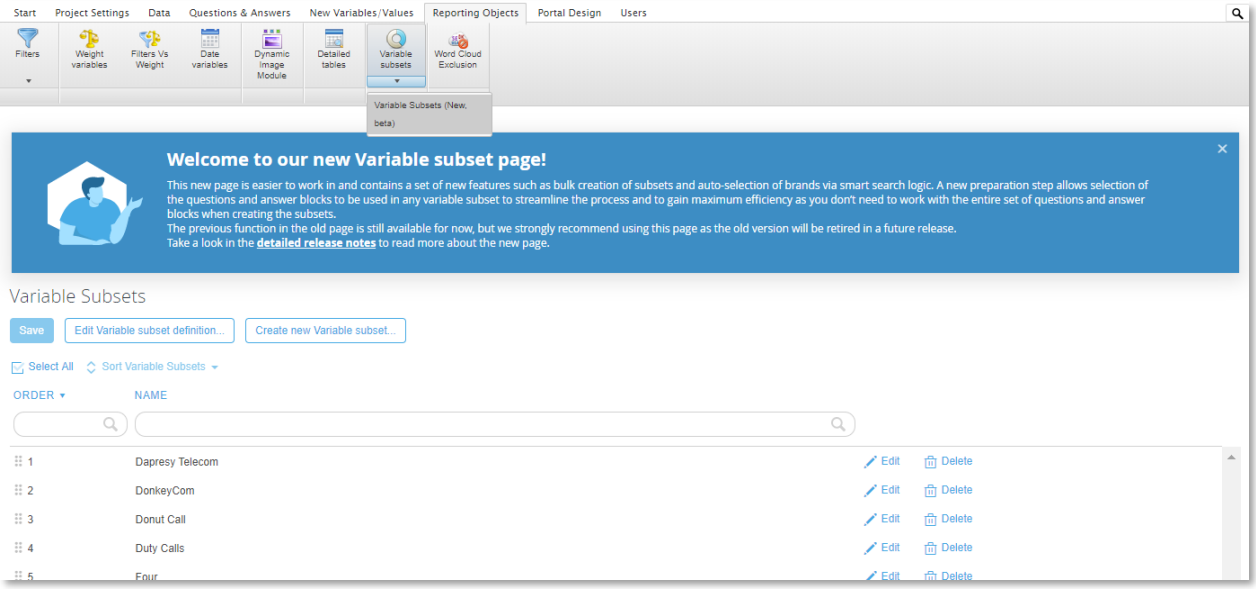


6.3.2 Setup

The new Variable subset page is currently located as a sub-page in the navigation menu as shown in the image below.

Here we see the new Variable subset page in the menu.



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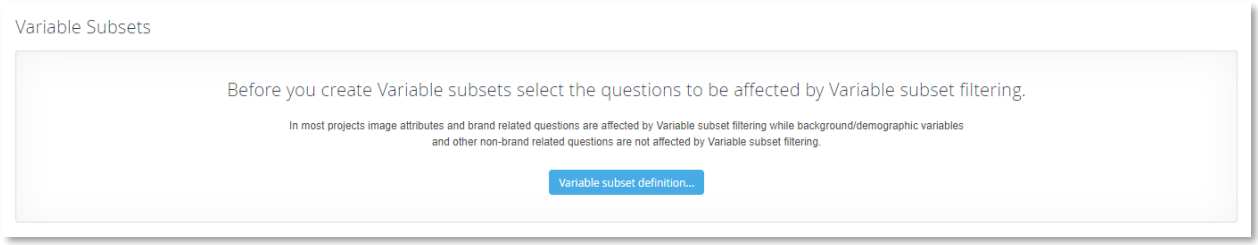
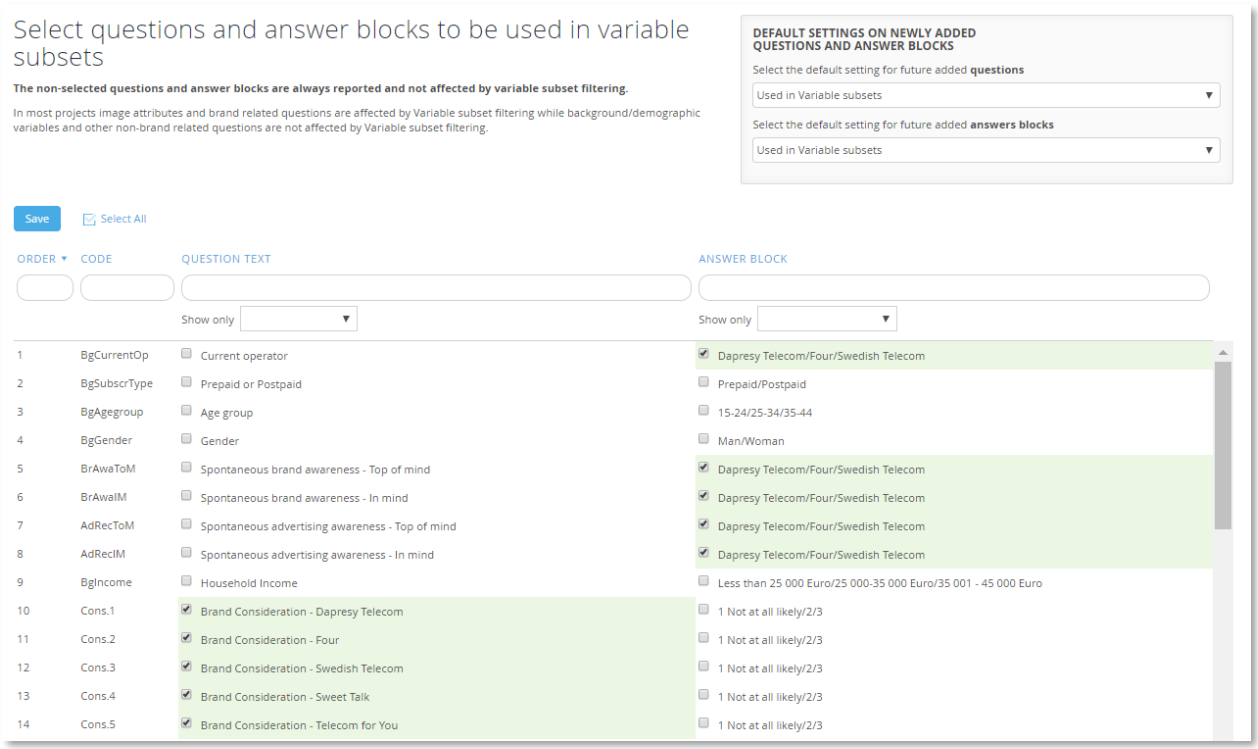
6.3.1.1 Variable subset definition setup

Before you can create a Variable subset in the new page you first need to setup the Variable subset definition, i.e. selecting which questions and answer block that should be affected by the Variable subset filtering. In most projects image attributes and brand related questions are affected by Variable subset filtering while background/demographic variables and other non-brand related questions are not influenced by Variable subset filtering. The non-selected questions and answer blocks are always reported and not filtered by variable subsets.

Here we see the Variable subset page in a newly created project. As a first step you are prompted to make the Variable subset definition before you can create the Variable subsets.



Below you see the Variable subset definition page, instructions are shown further down.



In this Variable subset definition page tick all questions and answer blocks to be affected by the

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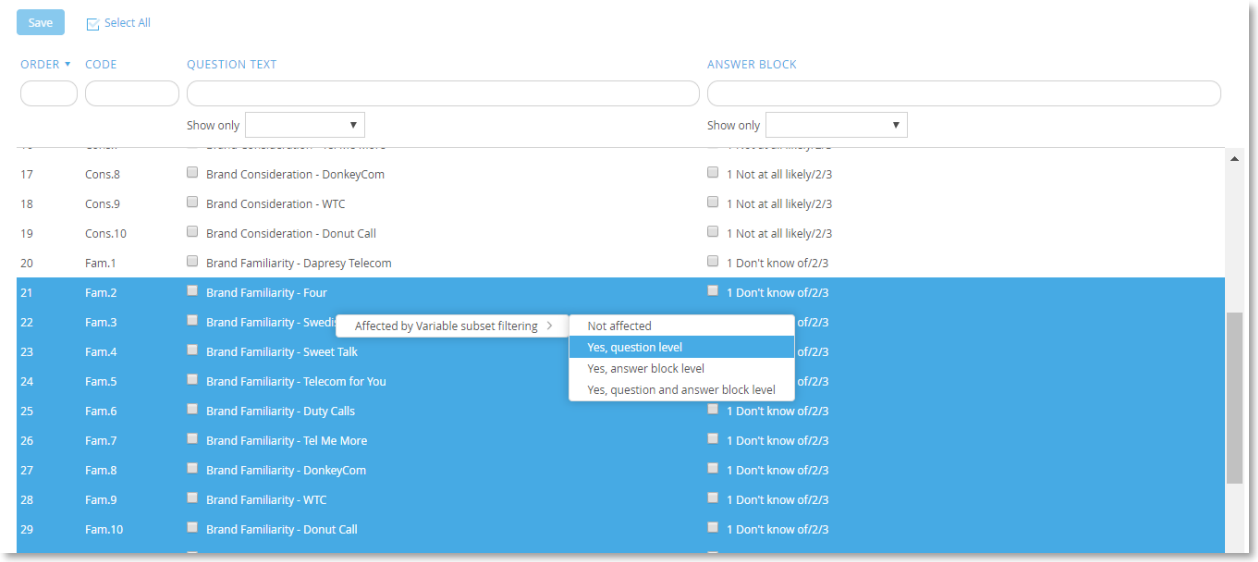
Variable subset filtering, the selected items will appear in next step when creating each variable subset. The image above comes from a brand tracker survey, a Variable subset should be created for each brand so brand related questions and answer blocks are selected only. The non-selected questions and answer blocks, such as gender and age, will not be effected by the Variable subset filtering and always be reported no matter what Variable subset that is selected in a report.

Tip, to bulk update items in the grid, select all rows to be updated and open the content menu by right clicking and select the option to be applied to all rows.

Here we see the bulk edit setting in the context menu.



Note, if a Variable subset has been created in the old page before the Variable subset definition step was applied in the new page, all the questions and answer blocks are automatically ticked in the Variable subset definition setup. So, in all existing projects where subsets were created before the new page existed all questions and answer blocks are ticked as shown below. We recommend that you enter the setup and tick the questions and answer blocks to be affected only, so you can use the full potential of the new pages for creating and editing Variable subsets.

Here we see the Variable subset definition page in a project where Variable subsets has been created in the old page before the Variable subset definition step has been setup, as shown all questions and answer blocks are ticked by default.

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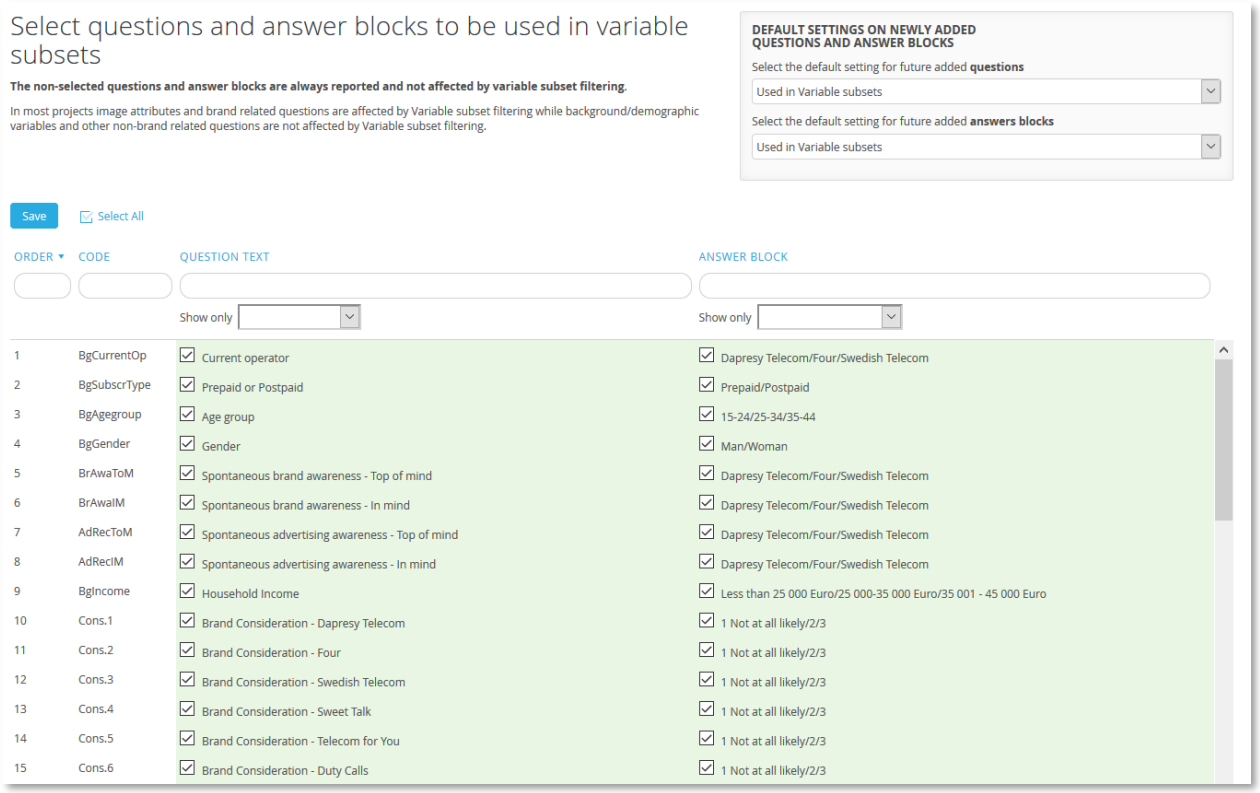

In the top right corner of the page (see image further down) you select what the default setting should be for future added questions and answer blocks. You select between “Used in Variable subsets” and “Not used in Variable subsets”.

- **Not used in Variable subset** = newly added questions and answer blocks are always reported as they will not be affected by Variable subsets
- **Used in Variable subsets** = newly added questions and answer blocks will only appear in the reporting if these have been added to the Variable subsets selected in the report. Further down in this document you see that each Variable subset has a default setting for what should happen with newly added items that should be affected by Variable subsets.

Here we see the default setting for future added questions and answer blocks in top right corner.

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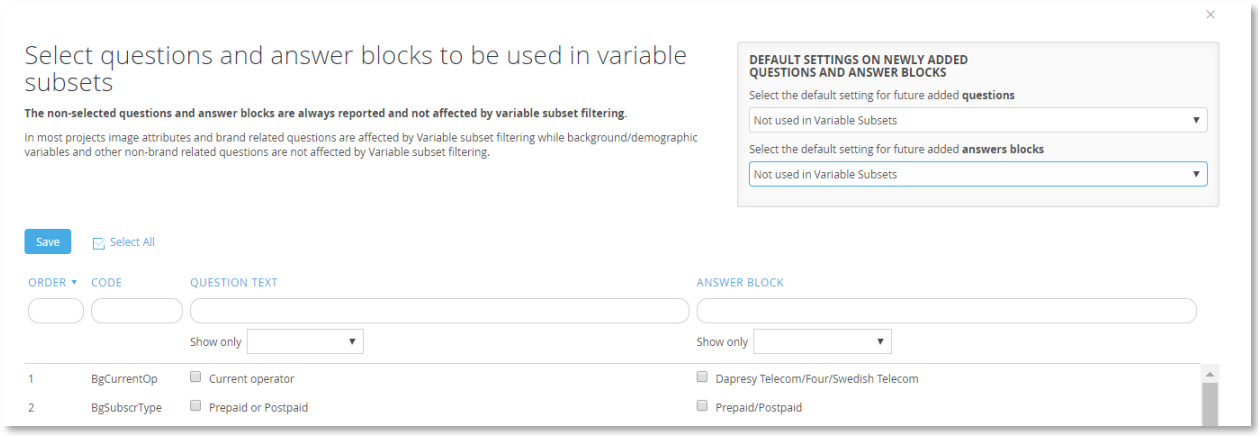
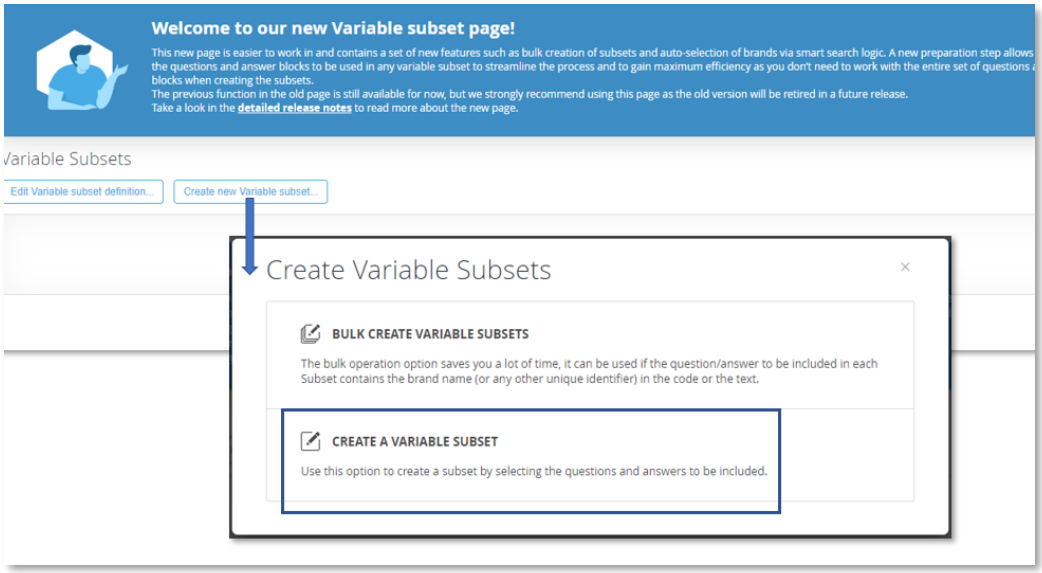


6.3.1.2 Create a Variable subset

In this chapter you see how to create a single Variable subset, in the next chapter you see how to bulk create variable subsets.

Pre-request, Variable subsets can only be created after the Variable subset definition has been setup (see previous chapter for how to make setup the Variable subset definitions).

Click here to start creation of a new Variable subset.



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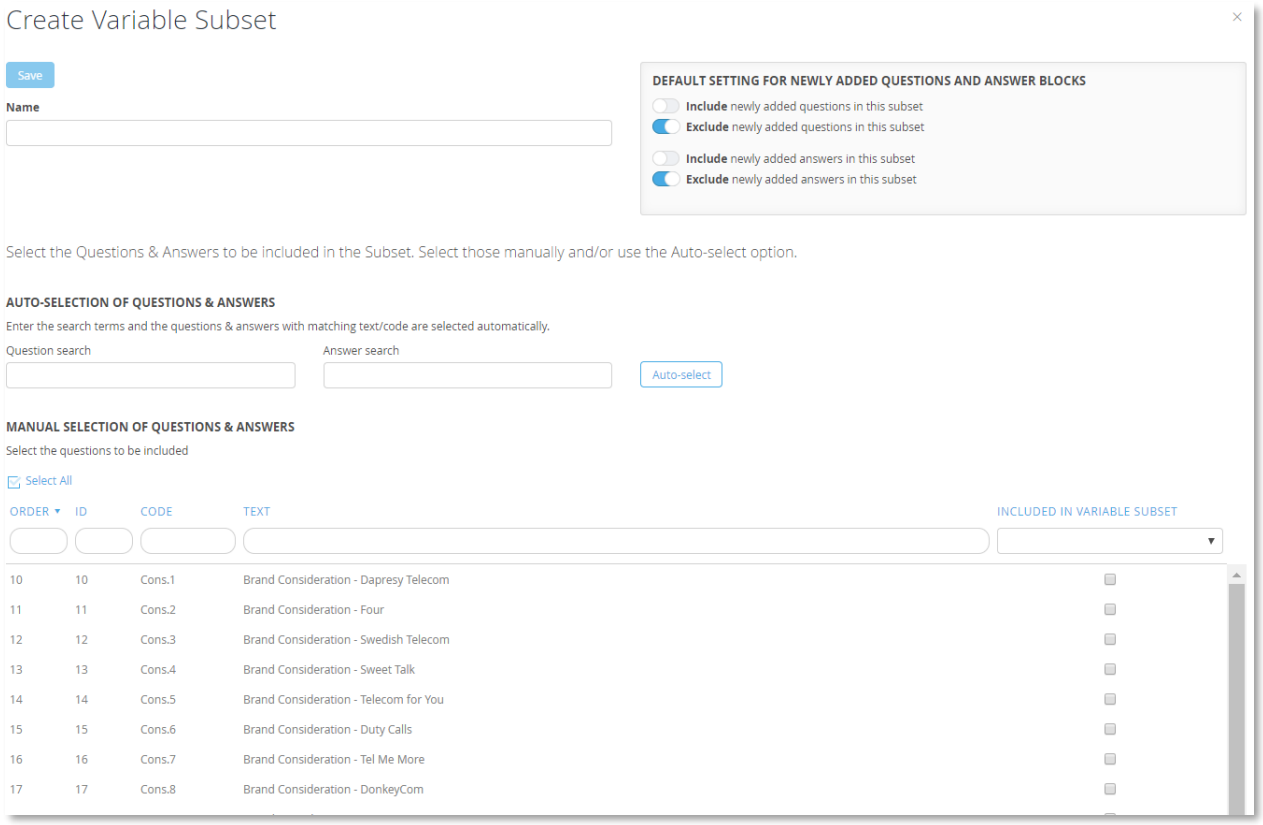
Here we see the page for creating Variable subset.



To create the subset (see image further down);

- Enter the name of the Variable subset
- Tick the questions to be shown when this Variable subset is used as a filter in the reporting
- Tick the answers to be shown when this Variable subset is used as a filter in the reporting (the answer grid is shown in below the question list)
- Select the what should happen with future added questions and answer blocks that are affected by Variable subset filtering, should these be included or excluded by default in this subset
- Click Save

Tip 1: in projects where you for example create a Variable subset for each brand you can use the "Auto-select option" if the questions and answers have the brand names in the labels or the codes. Below you see an example of this.

Here we see how the 3 questions and 1 answer were selected automatically when "Auto-select" was ticked. Note, Auto-select is not automatically applied to future added questions and answers, it is basically a search only applied in the moment you click the button.

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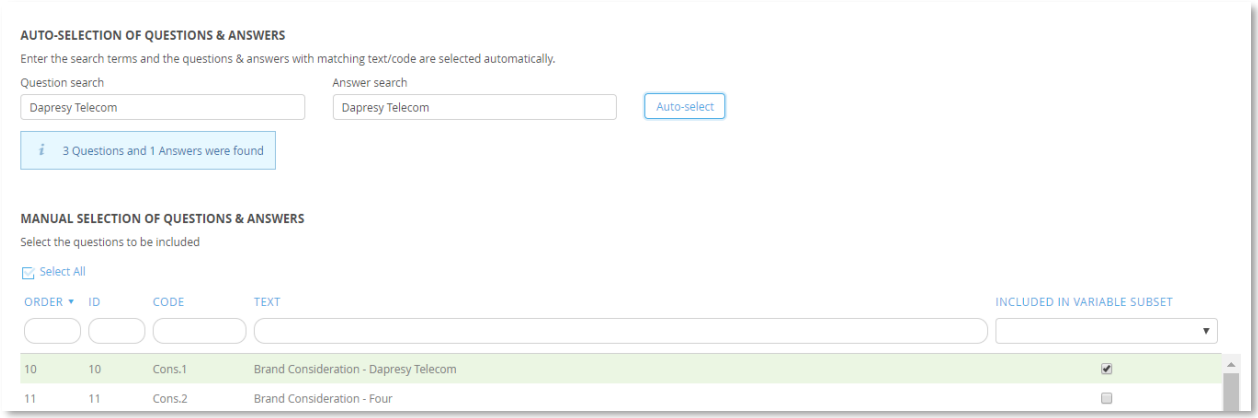
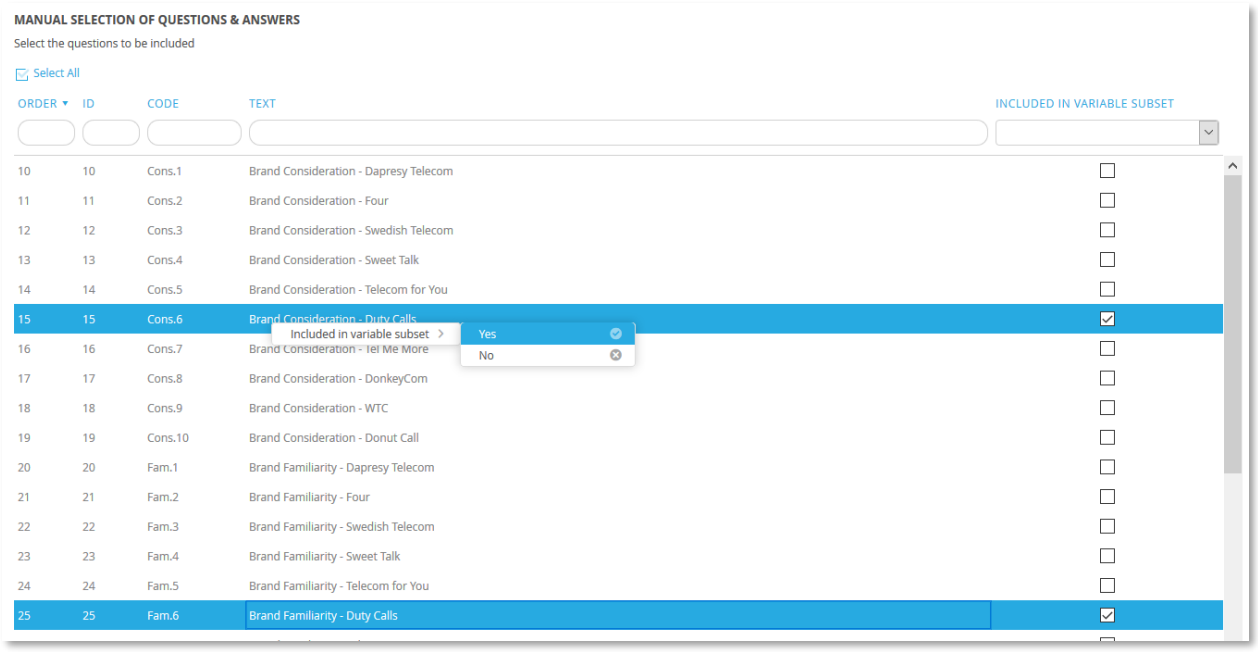


Tip 2: to bulk update items in the grid, select all rows to be updated and open the content menu via right click and select the option to be applied to all rows.

Here we see the context menu when creating a Variable subset.



6.3.1.3 Bulk create Variable subsets

In this chapter you see how to bulk create Variable subsets which saves you a lot of time. The bulk creation option can be used if the questions/answers to be included in each Variable subset contains the brand name (or any other unique identifier) in the code or the text.

Pre-request, Variable subsets can only be created after the Variable subset definition has been setup (see previous chapter for how to make setup the Variable subset definitions).

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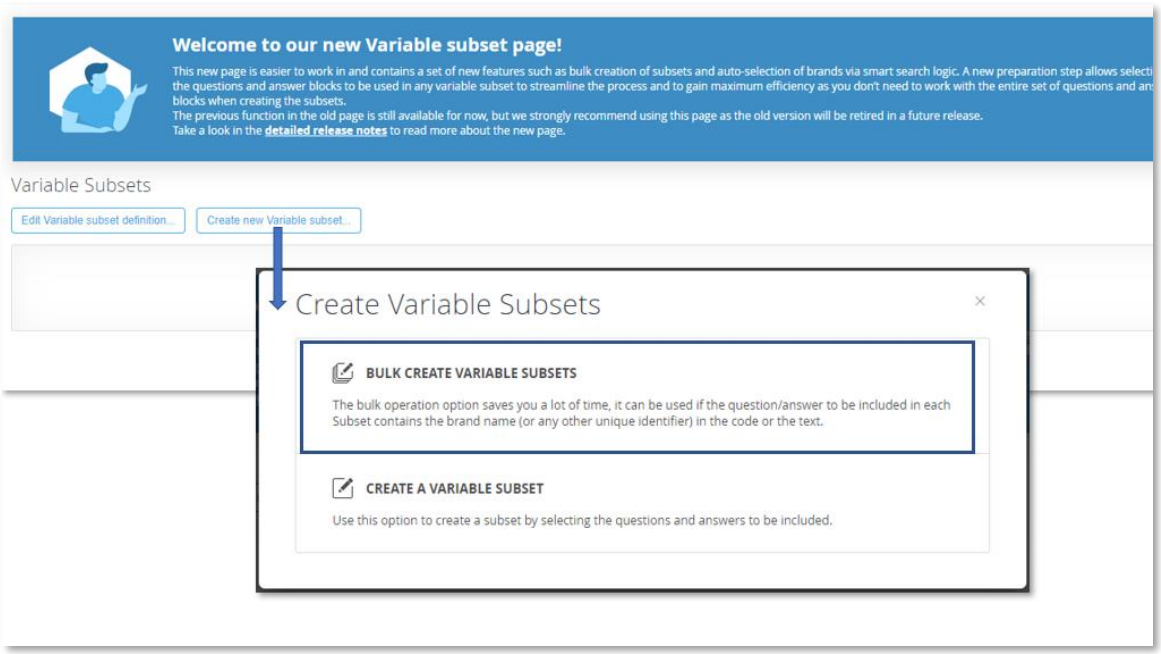
Click here to start bulk creation of new Variable subsets.



To bulk create the subset (see image further down);

- Enter the name of the first Variable subset to be created. As soon as the name is inserted you see number of questions and answers that matches the search criteria, these will be included in the subset automatically. You can also click “View” to see which questions and answers that will be included
- Repeat the steps above for each Variable subset to be created
- Select the option for what should happen with future added questions and answer blocks that are affected by Variable subset filtering, should these be included or excluded by default in these new subsets
- Click Save

Here you see the bulk creation page.

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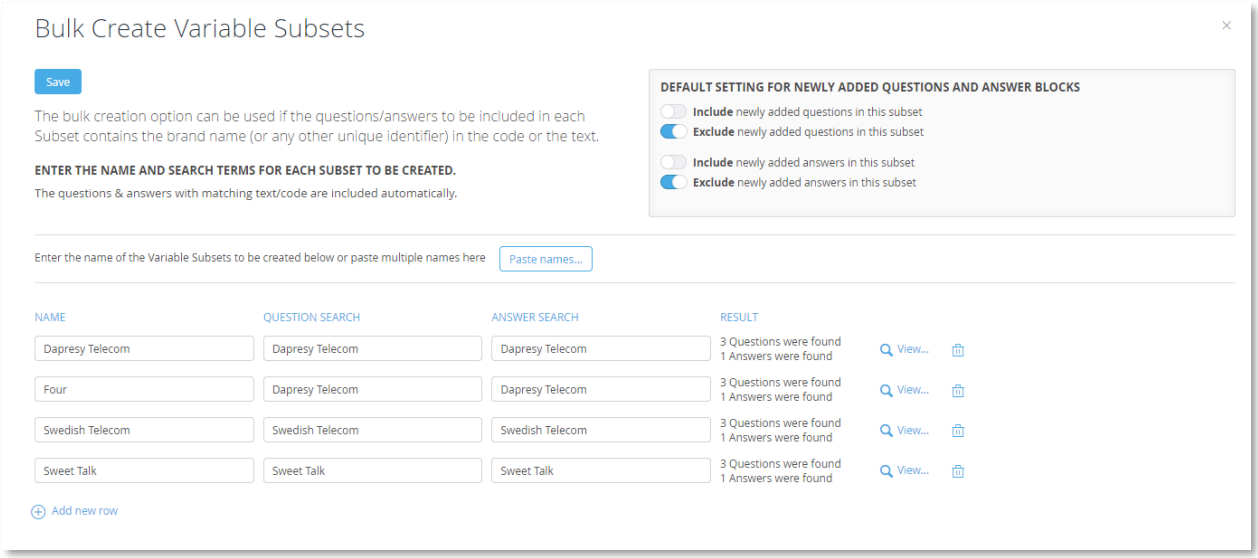
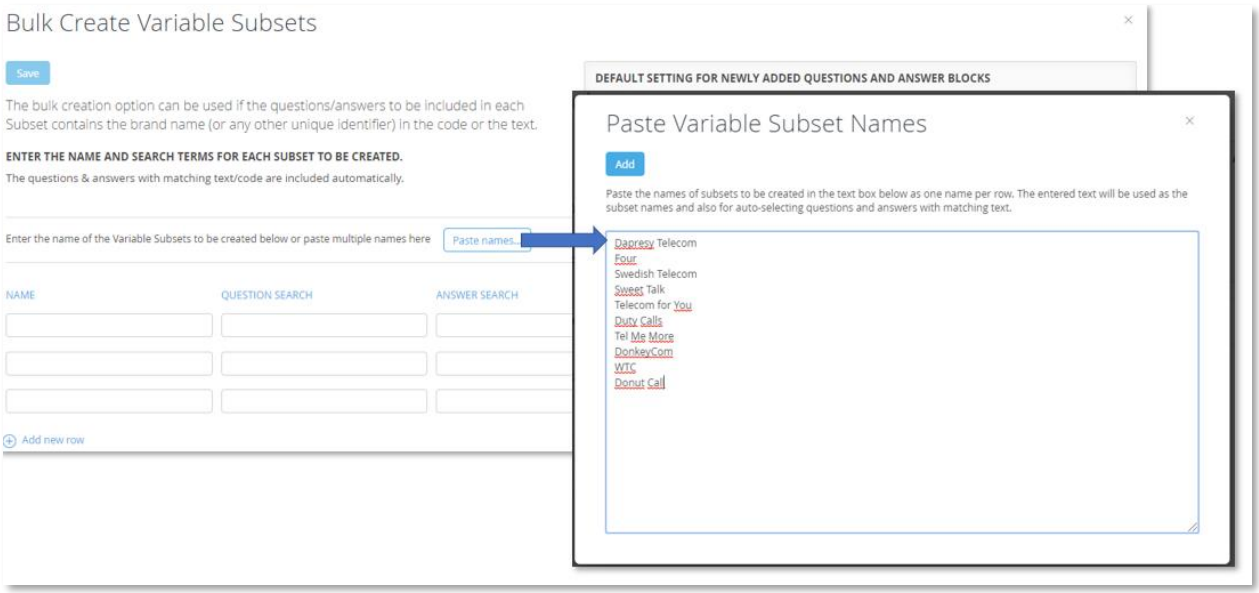


Tip: if you have a lot of Variable subsets to create, use the bulk pasting option shown below. Paste the names of subsets to be created in the text box as one name per row. The entered text will be used as the subset names and for auto-selecting questions and answers with matching text.

Here we see the bulk creation option.



6.3.1.4 Edit Variable subsets and change sort order

All created Variable subsets are shown in the Variable subset page as shown below. From here you can:

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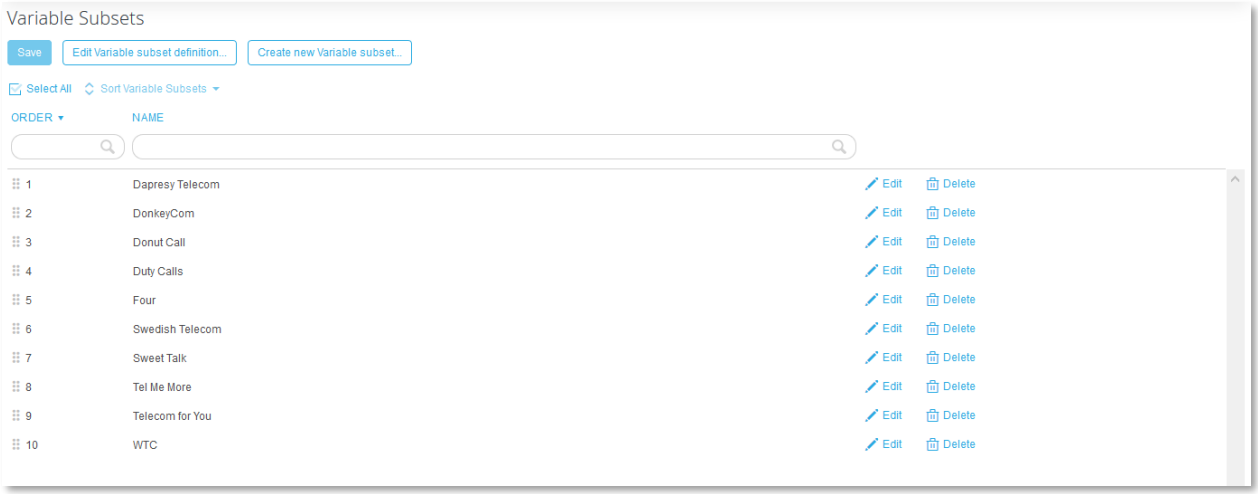
- Edit a Variable subset by clicking the Edit icon in most right column
- Update the name of the Variable subset by entering the name field
- Delete a Variable subset by clicking Delete icon in most right column
- Delete multiple Variable subsets by selecting all of them and open the context menu, via right click, and use the Delete option
- Update the sort order of the subsets via any of the following tree options
    - drag and drop
    - enter the desired sort order number in the Order column
    - Select the subsets to sort alphabetically and use the option “Sort Variable subsets” in the toolbar above the grid.

Here we see the list of all created Variable subsets.



6.3.1.5 Edits from Questions page

You can now also edit which Variable subsets a question/answer is included in from the Questions page. To do that enable the Variable subset column vi the column menu in top right corner above the Questions grid. In this new column each question has any of the following statuses:

- **Yes, answer block level** = the answer block of the question is used in Variable subset filtering (ticked in the Variable subset definition page). As an example, see “Current operator” in the image below.
- **Yes, question level** = the question is used in Variable subset filtering (ticked in the Variable subset definition page). As an example check “Brand consideration Dapresy Telecom” in the image below.
- **Yes, question and answer block level** = both the question and the answer block are used in Variable subset filtering (ticked in the Variable subset definition page).
- **Not affected** = either the question or the answer block is used in the Variable subset filtering. As an example see Gender and Age group in the image below.

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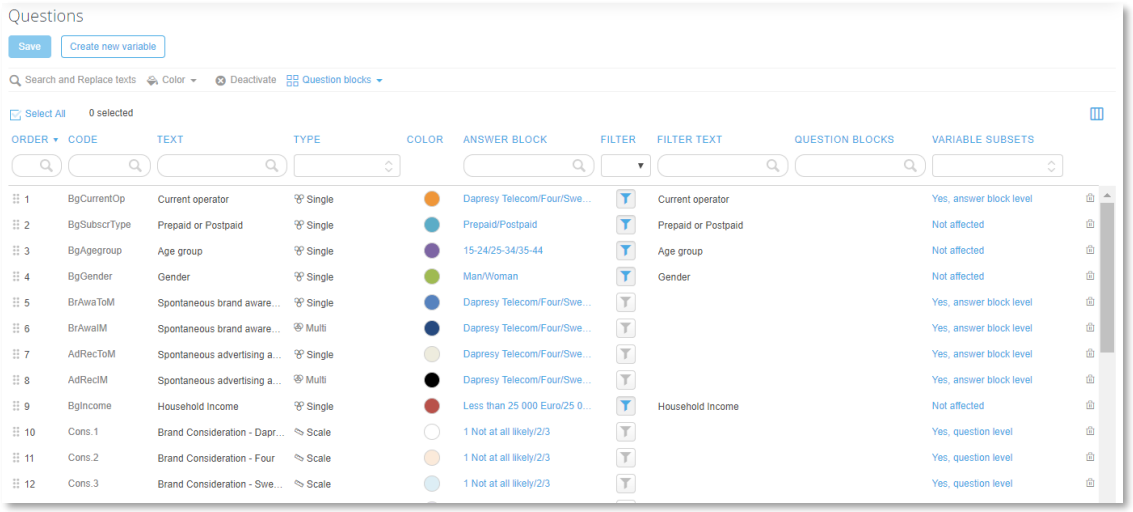
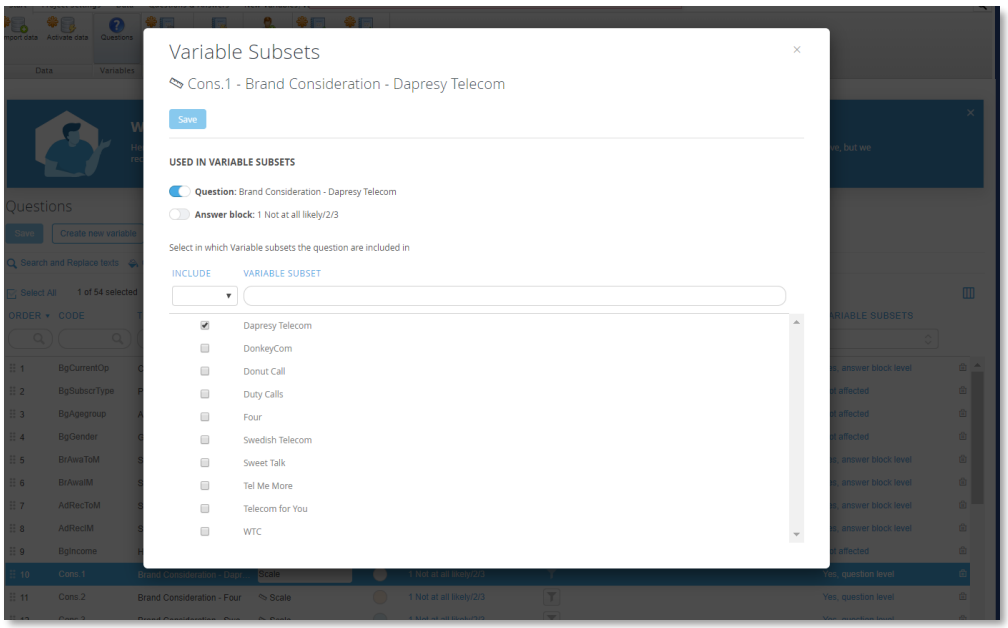
Here we see the new Variable subset column in the new Questions page. Note you have access to this column only if you have access to the new Variable subset page.



To change which Variable subsets a question or an answer is included in enter the link, in the Variable subset column, and in the popup page you see which Variable subsets the question/answer is included in.

Here we see an example, as shown the Question Dapresy Telecom is included in one Variable subset only.



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