

Dapresy 2020

October Release



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1 – Introduction

This document describes new and improved features in the Dapresy 2020 October 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

2 - Overview

The Dapresy 2020 October 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:

Cross Table tool, Workbook concept and access to filters

- A new “Workbooks and sheets” concept has been introduced in the Cross Table tool which is much like the existing decks and slides in the StoryCreator. This allows you to create a set of tables (sheets) and save these as a workbook. The workbook can be exported to Excel or shared with other users. The new workbook functionality improves efficiency when bulk creating tables, as sheets can be duplicated, re-ordered, etc. All sheets in a workbook can be exported to an Excel file.

The new Workbooks and sheets and sheet functionality seen here on the left

The screenshot shows the Dapresy Cross Table tool interface. On the left, there is a sidebar with a 'WORKBOOK: Toplines' header and a list of sheets: 'New', 'Save', 'Save as...', 'Open...', 'Shared with all users', and 'Export'. Below this is a 'SHEETS' section with a 'New sheet' button and a list of sheets: 'Awareness trend', 'Awareness - last 1 month', 'Top of mind by gender' (highlighted), 'In mind by gender', 'Image attributes', and 'Demographics'. The main area displays a table titled 'Top of mind by gender' for the time period '2011-01-01 to 2011-02-27'. The table has columns for 'Spontaneous brand awareness - Top of mind', 'Brand', and 'Gender' (Man and Woman). The data is as follows:

Spontaneous brand awareness - Top of mind	Brand	Gender	
		Man	Woman
		%	%
	Dapresy Telecom	33.4	27.7
	Four	4.1	6.3
	Swedish Telecom	7.9	5.4
	Sweet Talk	10.3	15.8
	Telecom for You	9.2	7.0
	Duty Calls	5.4	9.3
	Tel Me More	12.0	6.7
	DonkyCom	2.9	4.6
	WTC	4.0	5.5
	Donut Call	2.2	4.5
	Other	5.1	3.6
	Don't know	3.5	3.5

- Access to regular filters is now supported in the Cross Table tool which allows you to limit what data the users can use when creating tables. Access to Hierarchical filter units and Variable subsets are already supported and now with the ability to limit access by filters it allows access rights control in a near endless variety of combinations.

Improved significance testing in Cross Table tool and StoryCreator

- Significance testing logic is improved in StoryCreator and the Cross Table tool when there are multiple splits, like for example Age groups and Gender, as you can now select if the test should be applied across the splits or within each split only. The same functionality was already supported in the StoryTeller.

StoryCreator, turn tooltips on/off

- You can now turn on and off the result tooltips in charts and the export tooltips in charts/tables which makes it easier to work with smaller objects. The tooltips, when they are shown, can cover smaller objects which makes it hard to change position with drag and drop etc.

StoryTeller - hierarchical filters vs filters

- A new function for hiding filter options based on selected Hierarchical filter nodes has been implemented. By using this function different filter options can be shown for different hierarchical units which allows you to, for example, have more filter options available when selecting a unit higher up in the organization compared to a unit further down. This new logic is, for instance, useful in EX projects where additional filtering should be supported on higher levels only to ensure anonymity rules are followed as additional filtering on lower levels can lead to anonymity issues from “backwards” calculations by the users.

Data import - import of Confirmit Horizon data

- If you are using Confirmit Horizons as a data collection platform you can now import data, seamlessly, directly from any of your Confirmit Horizons surveys via the Data import page. Previously Confirmit Horizons data was always imported via the Import scheduler functionality but now using the new option to import directly from the Data import page the process is simpler in projects where you do not have a need for scheduled/continuously running data imports.

Report user management

- Users accessing the system via Single Sign On have always also been able to access the system via the login page, i.e. with a password, but now you can specify, on a user level, what login method the user should have access to (SSO or both SSO and Login page). By not allowing the user to enter the system via the login page, when the client has a SSO solution implemented, you prevent the possibility that the user circumvents SSO

authentication by using a password after leaving the organization and before being removed from the Dapresy system. The login method selections can be applied to both Report users and Administrator users.

- The User invite email now supports tokens for project name and project code (tokens are automatically filled with the text by the system when the email is sent).
- The layout of the Report user access rights pages is updated, there are no changes in terms of functionality.

Project administration, legacy pages removed from navigation

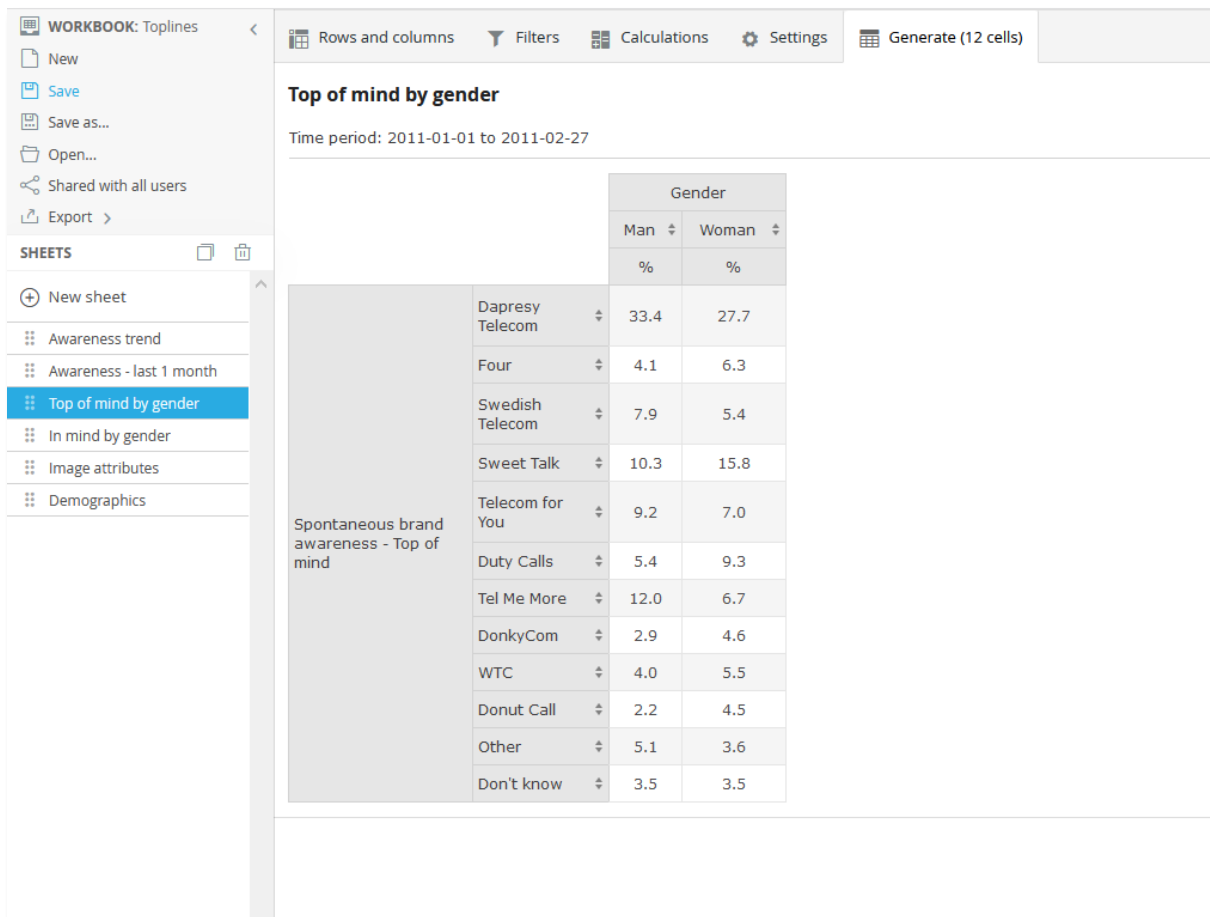
- The legacy pages listed below are now removed from the main menu as all these features are covered by the new Questions page released earlier this year.
 - Questions page legacy
 - Sort order Questions – New variables
 - Question blocks
 - Sort order Questions blocks
 - Answer blocks
 - Sort order Answers - Grouped answers
 - Filters
 - Sort order Filters

3 Cross Table tool

3.1 Workbooks and sheets

A new “Workbooks and sheets” concept has been introduced in the Cross Table tool which is much like the existing decks and slides in the StoryCreator. This allows you to create a set of tables (sheets) and save these as a workbook. The workbook can be exported to Excel or shared with other users. The new workbook functionality improves efficiency when bulk creating tables, as sheets can be duplicated, reordered, etc. All sheets in a workbook can be exported to an Excel file.

The new Workbooks and sheets and sheet functionality seen here on the left



The screenshot shows the Cross Table tool interface. On the left, there is a sidebar with a 'WORKBOOK: Toplines' section containing options like 'New', 'Save', 'Save as...', 'Open...', 'Shared with all users', and 'Export'. Below this is a 'SHEETS' section with a list of sheets: 'New sheet', 'Awareness trend', 'Awareness - last 1 month', 'Top of mind by gender' (highlighted), 'In mind by gender', 'Image attributes', and 'Demographics'. The main area displays a table titled 'Top of mind by gender' for the time period '2011-01-01 to 2011-02-27'. The table has columns for 'Spontaneous brand awareness - Top of mind', 'Brand', and 'Gender' (Man and Woman). The data is as follows:

Spontaneous brand awareness - Top of mind	Brand	Gender	
		Man	Woman
		%	%
	Dapresy Telecom	33.4	27.7
	Four	4.1	6.3
	Swedish Telecom	7.9	5.4
	Sweet Talk	10.3	15.8
	Telecom for You	9.2	7.0
	Duty Calls	5.4	9.3
	Tel Me More	12.0	6.7
	DonkyCom	2.9	4.6
	WTC	4.0	5.5
	Donut Call	2.2	4.5
	Other	5.1	3.6
	Don't know	3.5	3.5

Note 1: The new Workbook logic cannot be used in combination with the Favorites feature, so you must select whether you will use Workbooks or Favorites in your Cross

Table tool report. In the longer perspective Favorites will be removed and not available in new projects as the new Workbook concept is much more powerful.

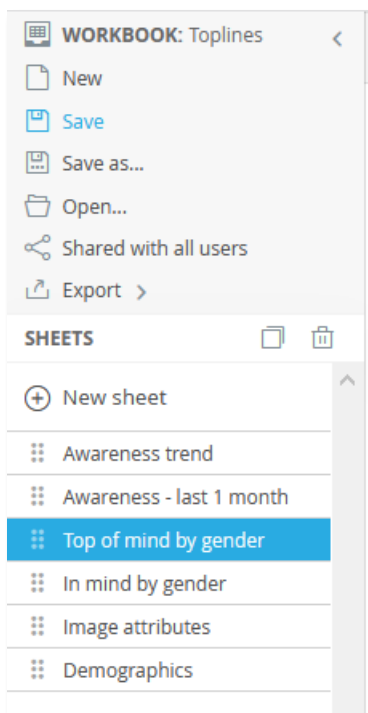
Note 2: if the Cross Table tool contains a hierarchical filter, the selected nodes are saved on each sheet which is a different behavior compared to Favorites. When saving a Favorite the selected hierarchical filter nodes are not saved, so if you have a need for saving the Hierarchical filter nodes as a part of the Favorite it is recommended to start using the Workbook concept instead.

Chapter 3.1.1 explains how to work with the Workbooks from an end-user perspective and chapter 3.1.2 how to enable Workbooks in your Cross Table tool.

3.1.1 Workbooks from the end-user perspective

In a Cross Table tool with Workbook logic applied, the new Workbook and sheet panel is shown on the left-hand side of the screen. At the top of the panel you manage the workbooks and in the bottom the sheets. Chapter 3.1.1.1 describes how to manage the sheets and chapter 3.1.1.2 how to manage the workbooks.

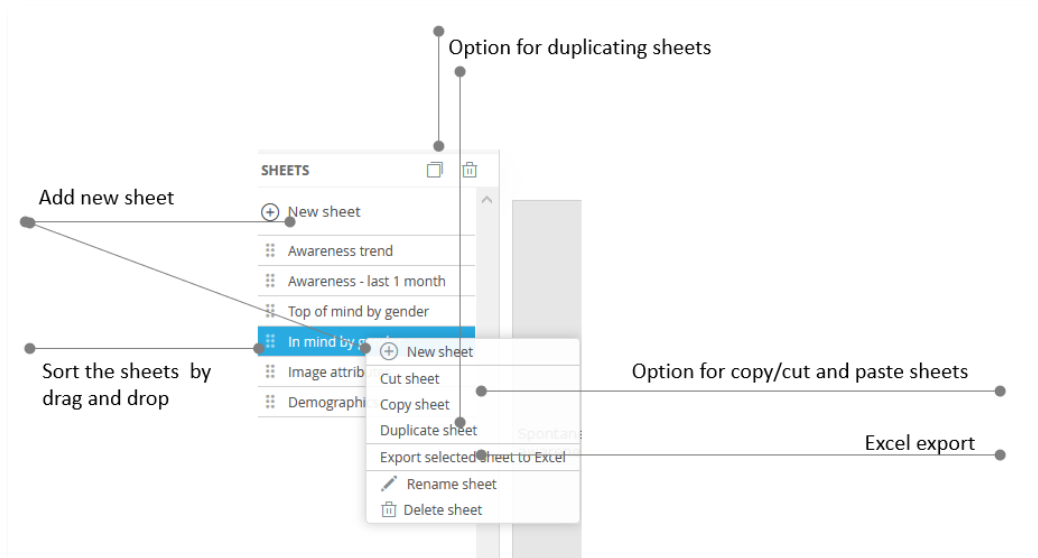
The new Workbooks and sheet panel



3.1.1.2 Sheet panel

The Sheet panel displays all the sheets in the current workbook and here you can add new sheets, rearrange the sheets by drag and drop, duplicate sheets, delete sheets, etc. As shown in the image below a context menu appears on right click, which includes in the same options as shown in the top of the Sheet panel.

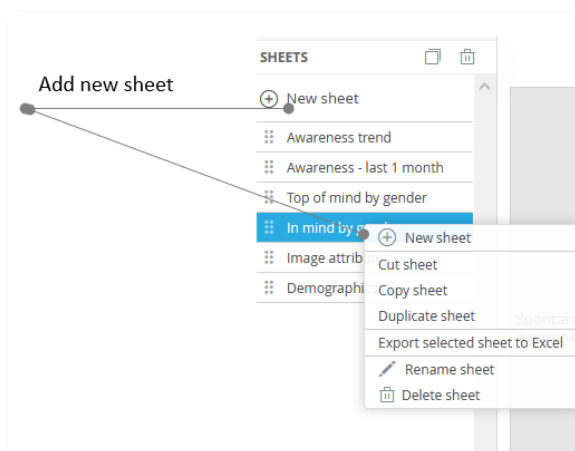
Here we see the Sheet panel and the context menu appearing on right click.



Add new sheet

A new sheet is inserted by clicking any of the options highlighted in the image below. The new sheet is inserted after the current selected sheet.

Here we see the New sheet buttons.



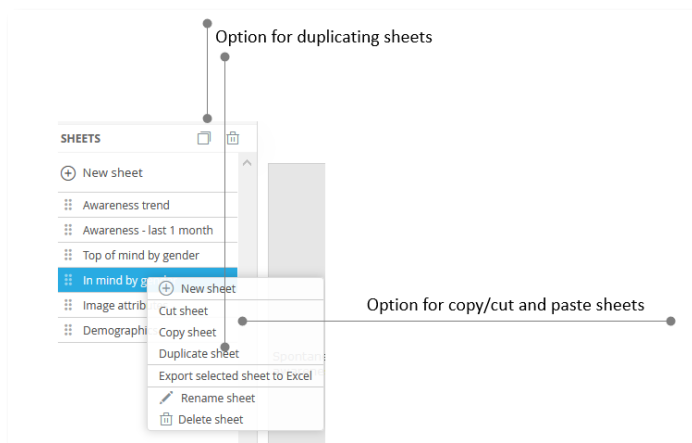
Duplicate and copy sheets

An existing sheet can be duplicated or copied which makes it easy to produce many similar sheets.

To duplicate a sheet, click any of the duplicate options highlighted in the image below. The new sheet is inserted after the duplicated sheet.

To copy and paste a sheet, click the copy option and paste the sheet in the desired position.

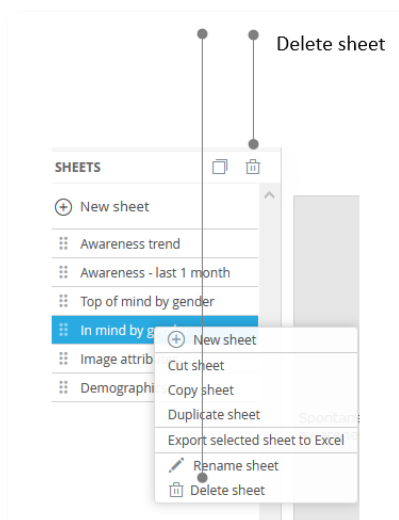
Here we see the Duplicate and Copy sheet options. The paste option appears in the context menu after a sheet has been copied or cut.



Delete a sheet

To delete a sheet click any of the delete options highlighted in the image below.

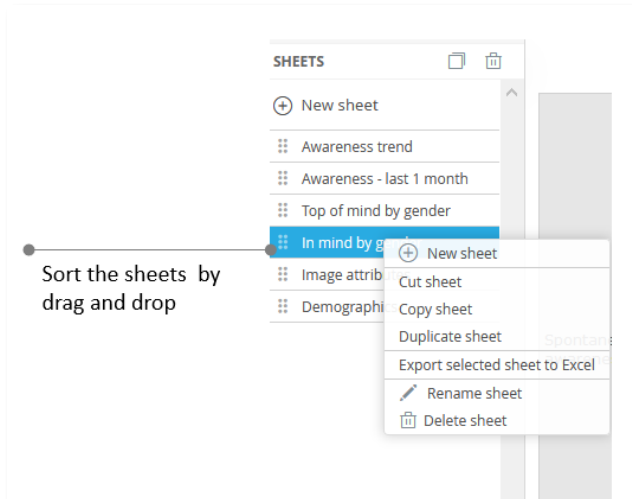
Here we see where to click to delete a sheet.



Rearrange sheets

The sort order of the sheets can be edited via drag and drop or by using cut and paste.

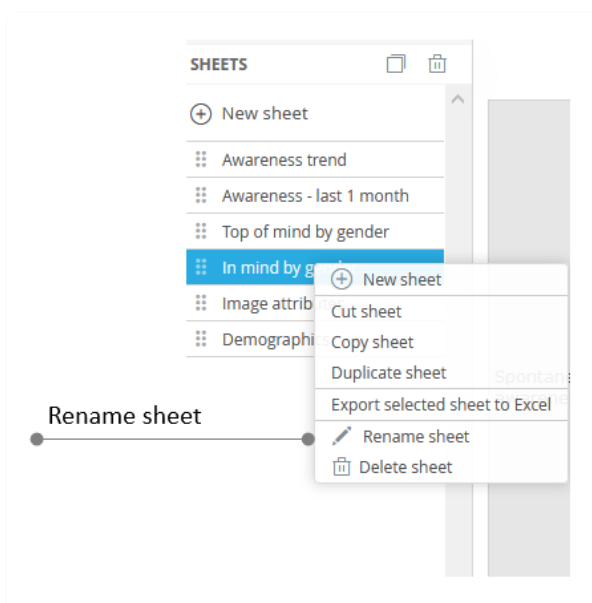
Here we see how to rearrange sheets with drag and drop.



Name sheets

The sheets can be named to give a better overview in the sheet panel when there are many sheets. The name of the sheet is also shown as a header above the table. To name a sheet: double click the sheet name or use the Rename sheet option in the context menu appearing on right click.

Here we see examples of named sheets and the Rename sheet option in the context menu.



Here we see how the sheet name appears above the table as a header. Both the sheet name and the header are included when exporting to Excel.

WORKBOOK: test report

Rows and columns Filters Calculations Settings Generate (96 cells)

Top of mind by age and gender
Time period: 2011-02-01 to 2011-02-27

		Gender		Age group					
		Man	Woman	15-24	25-34	35-44	45-54	55-64	65+
		%	%	%	%	%	%	%	%
Spontaneous brand awareness - Top of mind	Dapresy Telecom	32.4	26.2	32.1	25.3	28.9	34.7	26.3	29.4
	Four	6.7	5.5	1.7	6.2	5.7	12.1	4.7	6.7
	Swedish Telecom	8.8	5.2	11.3	0.9	9.7	8.5	8.3	3.0
	Sweet Talk	10.8	12.5	0.0	24.1	9.2	12.1	13.3	9.3
	Telecom for You	9.2	6.8	11.5	4.1	9.8	10.5	5.1	7.5
	Other	5.0	2.0	6.0	10.0	6.0	8.0	1.0	10.0

Presentation mode

A Presentation mode is available, in this mode the tables area is shown only, the table settings area is hidden and the Workbook and sheet panel is minimized.

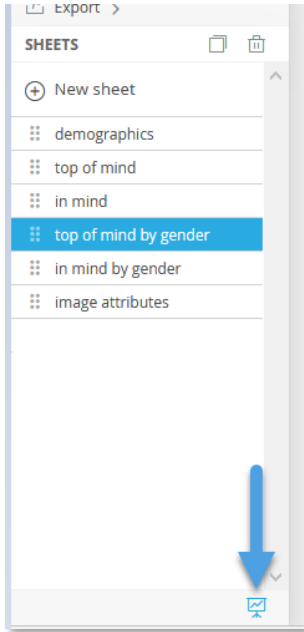
Here we see examples of the Presentation mode, to navigate between the sheets in presentation mode use the keyboard arrows or the sheet navigation panel in the bottom.

top of mind by gender
Time period: 2011-01-01 to 2011-02-27

		Gender	
		Man	Woman
		%	%
Spontaneous brand awareness - Top of mind	Dapresy Telecom	33.4	27.7
	Four	4.1	6.3
	Swedish Telecom	7.9	5.4
	Sweet Talk	10.3	15.8
	Telecom for You	9.2	7.0
	Duty Calls	5.4	9.3
	Tel Me More	12.0	6.7
	DonkyCom	2.9	4.6
	WTC	4.0	5.5
	Donut Call	2.2	4.5
	Other	5.1	3.6
	Don't know	3.5	3.5

Sheet: 4 - top of mind by gender - of 7

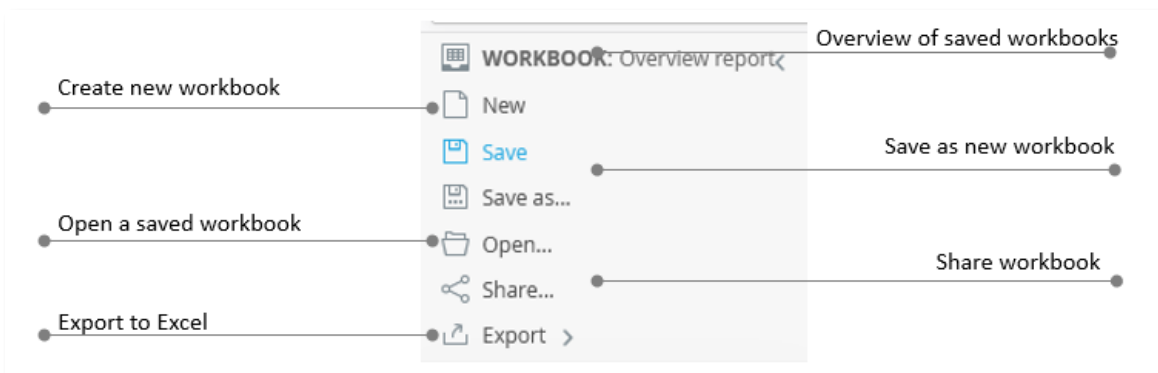
Here we see the option to click to open and close the workbook in Presentation mode. Escape can also be used to close presentation mode.



3.1.1.2 Workbooks

In the Workbooks panel you can save, load, share and export the workbooks you build.

Here we see an overview of the Workbook panel.

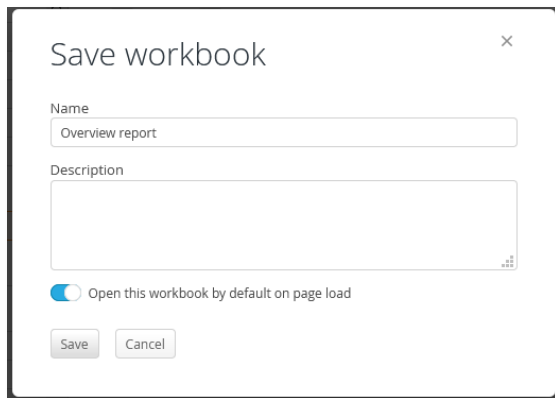


Save Workbook

To save your workbook a use the “Save as” button in the Workbook panel. In the popup panel you enter the name and a description of the workbook, the description is

optional. You can also select if the workbook should be loaded by default when you next time enter the same Cross Table tool report.

Here we see the Save Workbook panel.



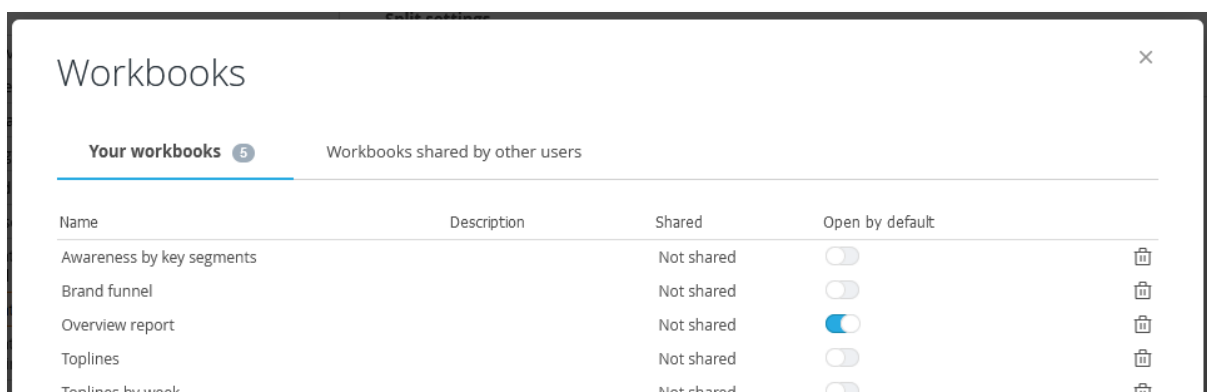
Tip: If you are working in an already saved workbook, or have opened an existing one, and want to save the latest changes use the “Save” button instead of “Save as”, it saves the workbook in the same name automatically.

Note, if the Cross Table tool contains a hierarchical filter the selected nodes are saved on each sheet which is a difference compared to Favorites. When saving a Favorite the selected nodes are not saved.

Open a saved Workbooks

To open an existing workbook click the Open option in the Workbook panel. In the popup panel you will see your own workbooks, to load any of these reports click the name of the one to be opened.

Here we see the Open panel, just click the deck to be loaded.

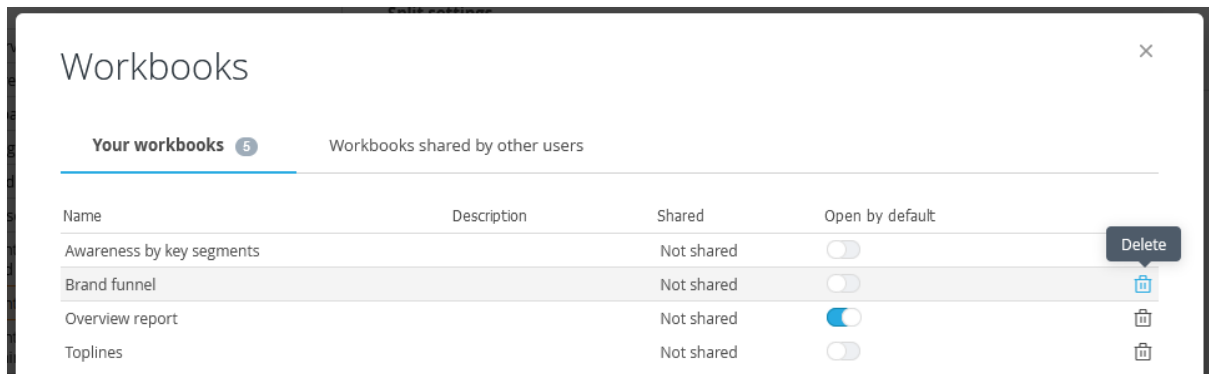


Name	Description	Shared	Open by default	
Awareness by key segments		Not shared	<input type="checkbox"/>	
Brand funnel		Not shared	<input type="checkbox"/>	
Overview report		Not shared	<input checked="" type="checkbox"/>	
Toplines		Not shared	<input type="checkbox"/>	
Toplines by week		Not shared	<input type="checkbox"/>	

Delete a Workbook

A workbook can be deleted from the workbook overview panel. You reach this panel by clicking the first option named Workbooks in the Workbooks panel. In the appearing popup panel the delete option is shown to the most right.

Here we see how to delete a workbook.

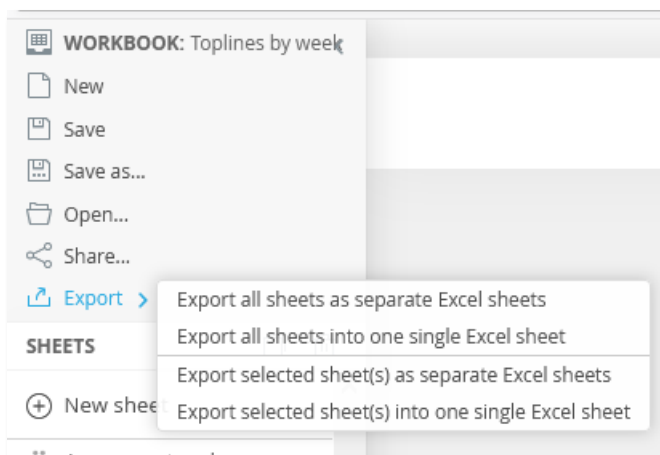


Export

The current open workbook can be exported to Excel from the Workbook panel.

To make an export click the Export option in the Workbook panel and select export option. Either you export all the sheets or just the selected sheets. You can also select if all the sheets online should be exported as separate sheets or if all sheets online should be merged into single sheet in the exported Excel file.

Here we see the export button, click this button to open the export panel.



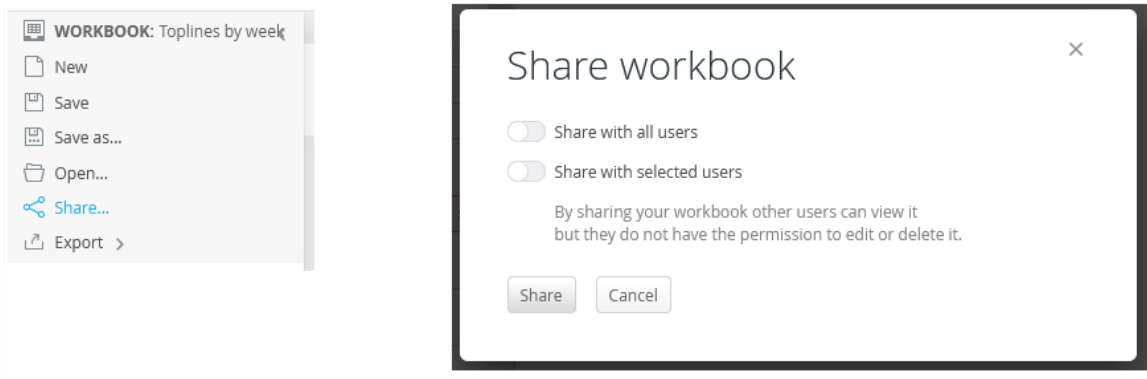
Share a workbook

If sharing is allowed the sharing of workbooks are made via the Sharing option in the Workbook panel. Sharing of Workbooks works in the same way as sharing Favorites which means that you can share to all users or selected users.

When sharing a workbook to all users only the users with access to all the items (Hierarchical filters, Filters and Variable subsets) in the Workbook can see and load the shared Favorite.

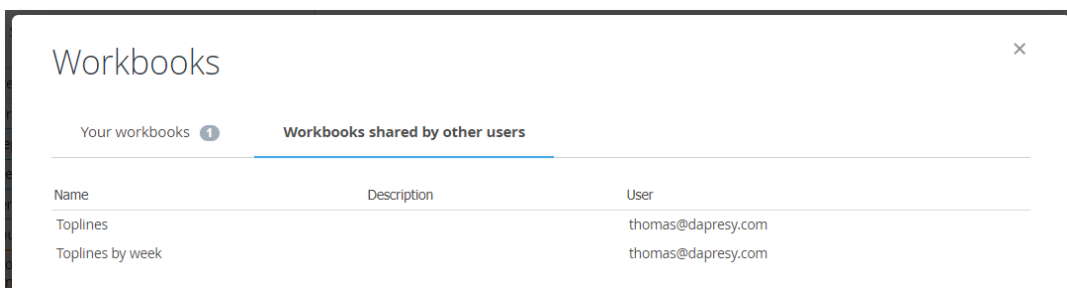
When sharing a Favorite to selected users you can only share to users with access to all the items in the shared Workbook.

Here we see the sharing option to the left and sharing panel to the right.



To open a Workbook shared by another user enter the Workbook panel and the second sheet which lists all the workbooks shared by other users. An Administrator user will see all the saved Workbooks in this list, even the non-shared workbooks.

Here we see how load a shared workbook.



3.1.2 Enabling Workbooks in Cross Table tool

The workbook logic is not enabled by default in the Cross Table tool, you enable the Workbook logic in same panel as you previously enabled the Favorite function as shown below.

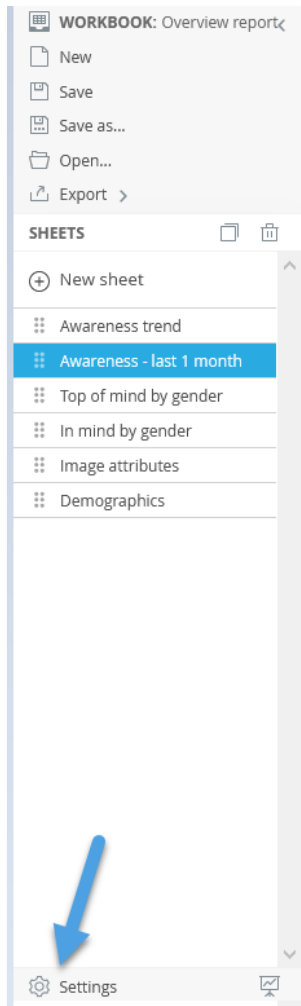
Here we see where to enable the Workbook functionality in a Cross Table tool report.

The screenshot shows a configuration panel for the Cross Table tool. It consists of several expandable sections, each with a plus sign icon on the right. The sections are: QUESTIONS, CALCULATION TYPES, STATIC FILTERS, TIME PERIOD, INTERVAL (with a plus sign icon), MOVING AVERAGE (with a plus sign icon), WEIGHTING, BASE SIZE LIMITS, FAVORITES/WORKBOOKS AND SHARING (with a minus sign icon), OPTIONAL FEATURES, DEVICE FILTERING, and AUTOMATIC TABLE CREATION. The 'FAVORITES/WORKBOOKS AND SHARING' section is expanded, showing three toggle switches: 'Allow saving Favorites' (disabled), 'Allow saving Workbooks' (enabled), and 'Allow sharing' (disabled). At the bottom right of the panel are 'Cancel' and 'Save' buttons.

Note 1, if the Cross Table tool contains saved Favorites and Workbook logic is applied instead each saved Favorite will be converted into a Workbook with a single sheet. It is not possible to go from using Workbooks to using Favorites as Workbooks cannot be converted to Favorites. If you have a need to use Favorites instead of Workbooks you must first manually delete all saved Workbooks.

Note 2: When the new Workbook logic is applied the "Setup" option is moved from the top right corner of the Cross Table tool to the bottom of the Workbook and sheet panel, see below.

Here we see where the Cross Table tool setup option is positioned when using workbooks.



3.2 Access to Filters

Access to regular filters are now supported in the Cross Table tool which allows you to limit what data the users can use when creating tables. Access to Hierarchical filter units and Variable subsets were already supported and by now also having the ability to limit by filters it allows you to limit the access rights in a huge variety of combinations.

3.2.1 End-user view when having limited filter access rights

When an end-user enters the Cross Table tool any variable which the user has limited access to is applied as Filter by default.

Example: A Segment variable with options X, Y and Z is used as filter variable and the logged in user has access to options X and Y only. When the user opens the Cross Table

tool the Segment filters X and Y are applied as filters by default, see image 1 below. If the user now removes the Segment filter the Segment variable appears as a split automatically to ensure the data always is filtered by the applied limited access rights, see image 2 below. The same logic is already used for Hierarchical filters, the hierarchical filter is always applied either as a split or as a filter.

Image 1, here we see how data is filtered by segment X and Y by default when the user enters the Cross Table tool.

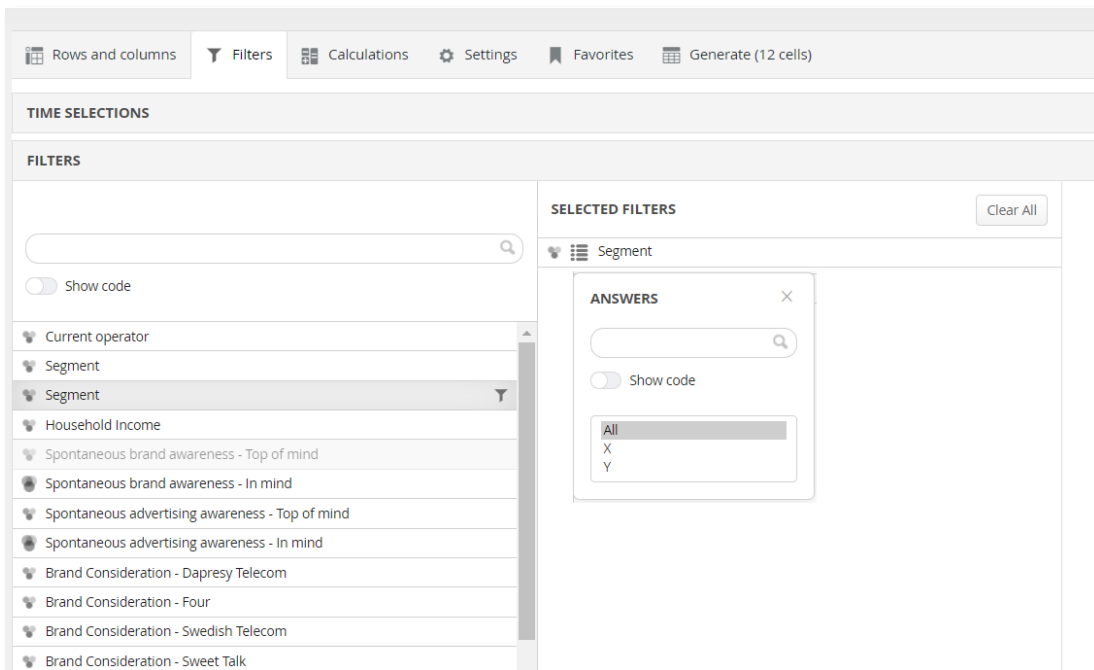
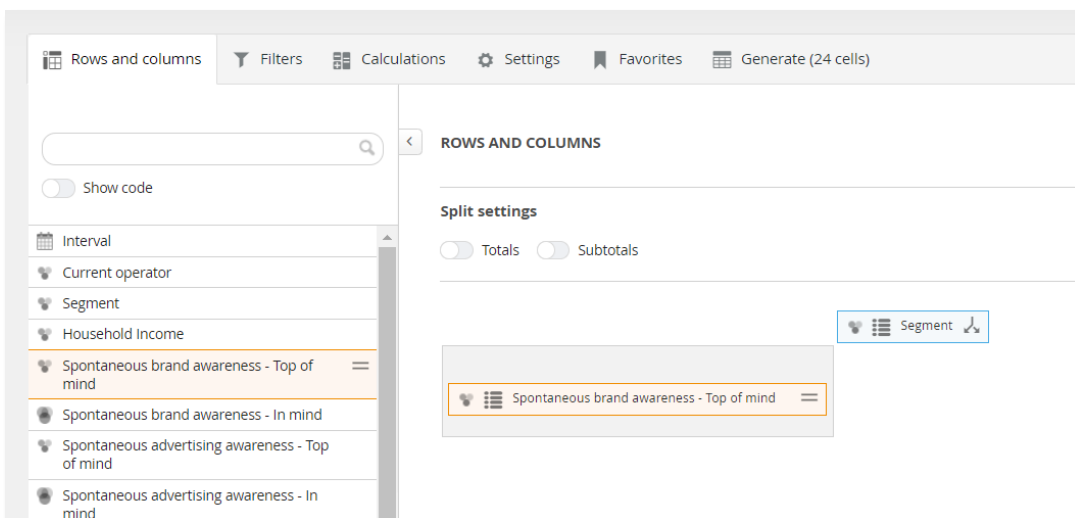


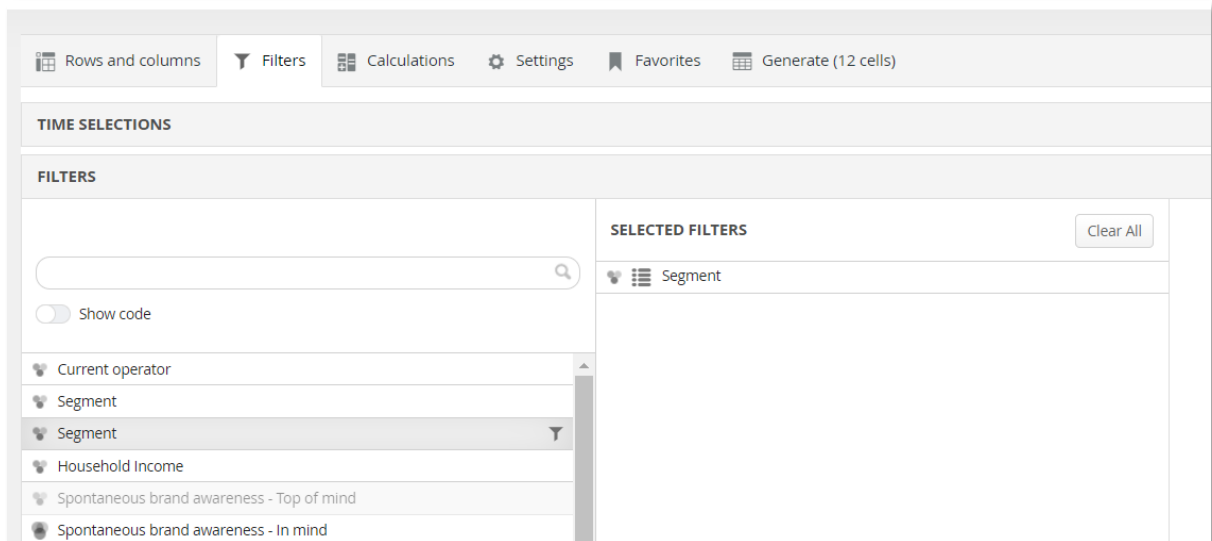
Image 2, here we now see how the Segment variable is used as split, this happens automatically if the user removes the Segment filter to ensure access rights are followed.



Note 1: if a user has access to one filter option only in a filter variable that Filter is not displayed in the filter tab, though the data is always filtered by this option. This is the same logic as used in the StoryTeller.

Example. A user has limited access rights in the Segment and in the Country filter. In the segment filter the user has access to X and Y and in the Country filter the user has access to Sweden only. When the user enters the Cross Table tool the Segment filter is shown as applied filter in the Filter tab, the Country filter is hidden as the user has access to one option only. Though it is still shown in the result table that data is filtered by Sweden. In first image below we see how it looks in the Filter tab, Segment Filter is shown only, and in second image we see the filter information in the result table.

Here we see that only Segment filter is shown in Filter tab.



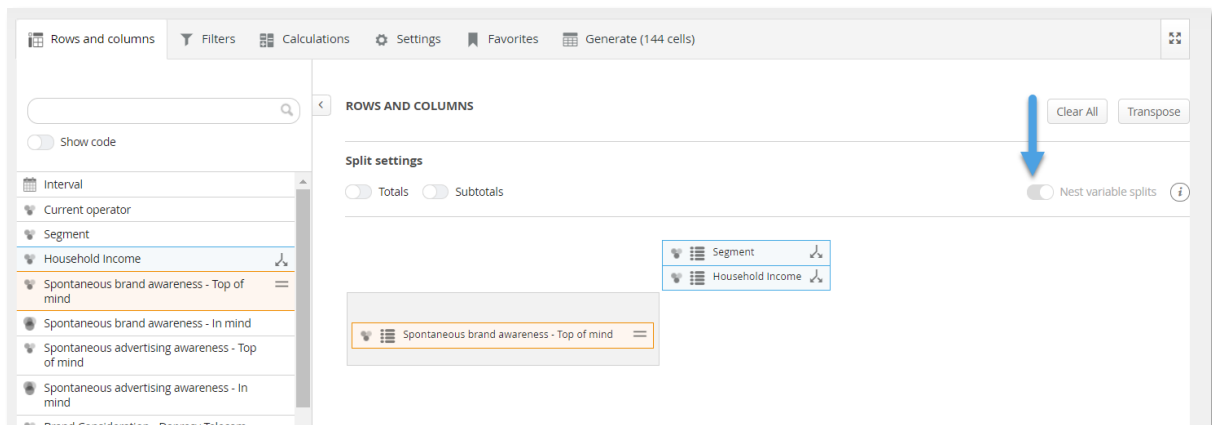
Here we see that data is filtered by both Segment and Country in the filter information.

The screenshot shows the result table in a data tool. The table has columns for the brand name, a percentage value, and a percentage symbol. The data is filtered by Segment (X, Y) and Country (Sweden). The table shows the following data:

		%
Spontaneous brand awareness - Top of mind	Dapresy Telecom	34.8
	Four	3.0
	Swedish Telecom	6.6
	Sweet Talk	10.1
	Telecom for You	7.6
	Duty Calls	7.8

Note 2: if the Segment variable in the example above is used as a split and the user adds additional splits the splits must be nested as otherwise data access rights are not followed. In this scenario the nesting option is being disabled and the splits are automatically nested.

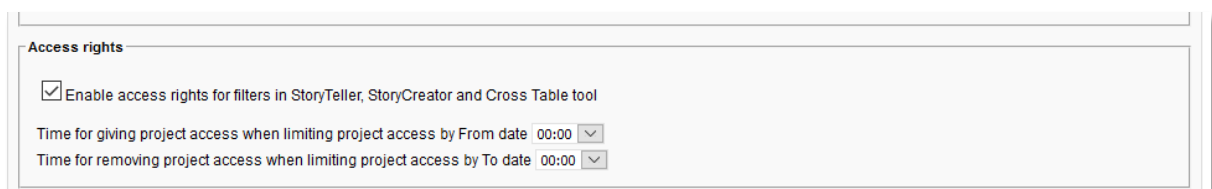
Here we see how the user added both Segment and Household income as split variables, now these are nested automatically and the user cannot disable the nesting option.



3.2.2 Setup

In newly created projects the access to filters in the Cross Table tool is applied automatically when enabling the “Access to filters” option in Project settings page. In projects created before access to filters in Cross Table tool was released you will see two options in the Project settings page, one option for StoryTeller/StoryCreator and another option for the Cross Table tool.

How to enable access rights to filters in the Cross Table tool in newly created projects. As shown the same setting is applied to StoryTellers, StoryCreator and Cross Table tools.



Here we see how to enable access rights to filters in the Cross Table tool in projects created before access to filter support in the Cross Table tool was released.

Access rights

- Enable access rights for filters in StoryTeller and StoryCreator
- Enable access rights for filters in Cross Table tool

Time for giving project access when limiting project access by From date 00:00

Time for removing project access when limiting project access by To date 00:00

4 Improved significance testing in Cross Table tool and StoryCreator

Significance testing logic is now improved in StoryCreator and Cross Table tool when having multiple splits, like for example Age groups and Gender, as you can now select if the test should be applied across the splits or within each split only.

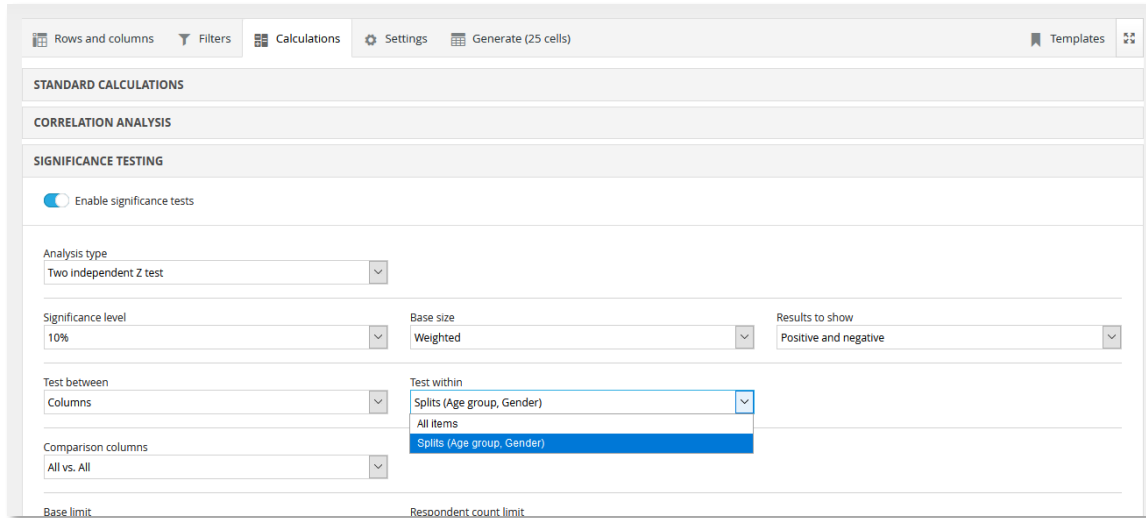
To the left we see the old logic when the test is made across the splits, in this example an “all vs all” test is applied so all columns are tested against each other. To the right we see the new option to perform the test within each split only which means that all columns within Age group are tested to each other and all columns within Gender are tested to each other.

		Age group			Gender	
		25-34	35-44	45-54	Man	Woman
		(a) %	(b) %	(c) %	(d) %	(e) %
Spontaneous brand awareness - Top of mind	Dapresy Telecom	32.5	35.4	27.1	33.4	27.7
	Four	5.0	6.0	5.3	4.1	6.3
	Swedish Telecom	1.1 (b-,c-,d-,e-)	7.5 (a+)	9.3 (a+)	7.9 (a+)	5.4 (a+)
	Sweet Talk	18.3 (d+)	12.4	12.7	10.3 (a-,e-)	15.8 (d+)
	Telecom for You	8.4	7.3	10.0	9.2	7.0

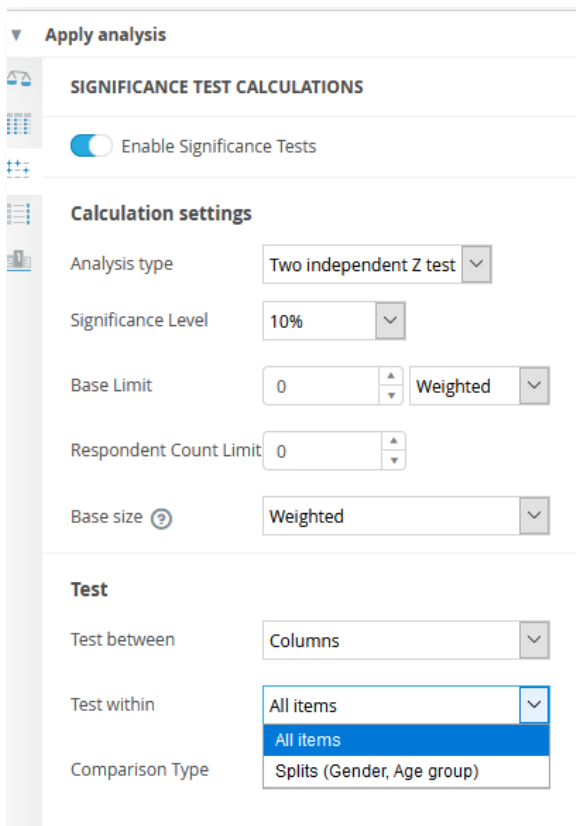
		Age group			Gender	
		25-34	35-44	45-54	Man	Woman
		(a) %	(b) %	(c) %	(d) %	(e) %
Spontaneous brand awareness - Top of mind	Dapresy Telecom	32.5	35.4	27.1	33.4	27.7
	Four	5.0	6.0	5.3	4.1	6.3
	Swedish Telecom	1.1 (b-,c-)	7.5 (a+)	9.3 (a+)	7.9	5.4
	Sweet Talk	18.3	12.4	12.7	10.3 (e-)	15.8 (d+)
	Telecom for You	8.4	7.3	10.0	9.2	7.0

In the Significance test panel a new setting has been implemented where you select how the testing should be made if you have multiple splits. The function was already supported in StoryTeller so same logic is now implemented in both the Cross Table tool and StoryCreator.

The new "Test within" setting added to Cross Table tool.



Here we see the new "Test within" setting added to StoryCreator.

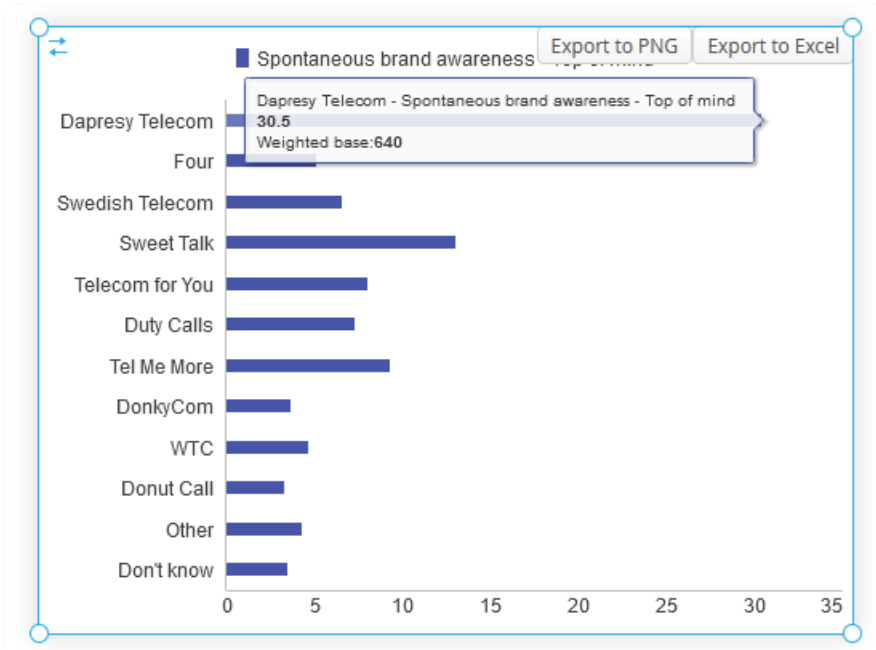


5 StoryCreator – turn tooltips on/off

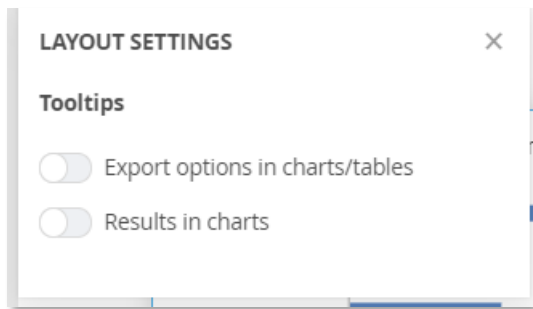
You can now turn the result tooltips in charts and the export tooltips in charts/tables on and off which makes it easier to work with smaller objects, as the tooltips, when they are displayed, can cover smaller objects which makes it hard to change position with drag and drop etc.

There are two settings, one for turning the “result” tooltips in charts on/off and another setting for turning export tooltips in charts and tables on/off. The new settings are positioned in a new Layout settings panel which can be opened via the context menu in right click or via the Slide layout panel (see images below). It is a deck level setting and not a setting per object. The setting is not saved as a part of the deck, the tooltips are always displayed by default when entering the StoryCreator.

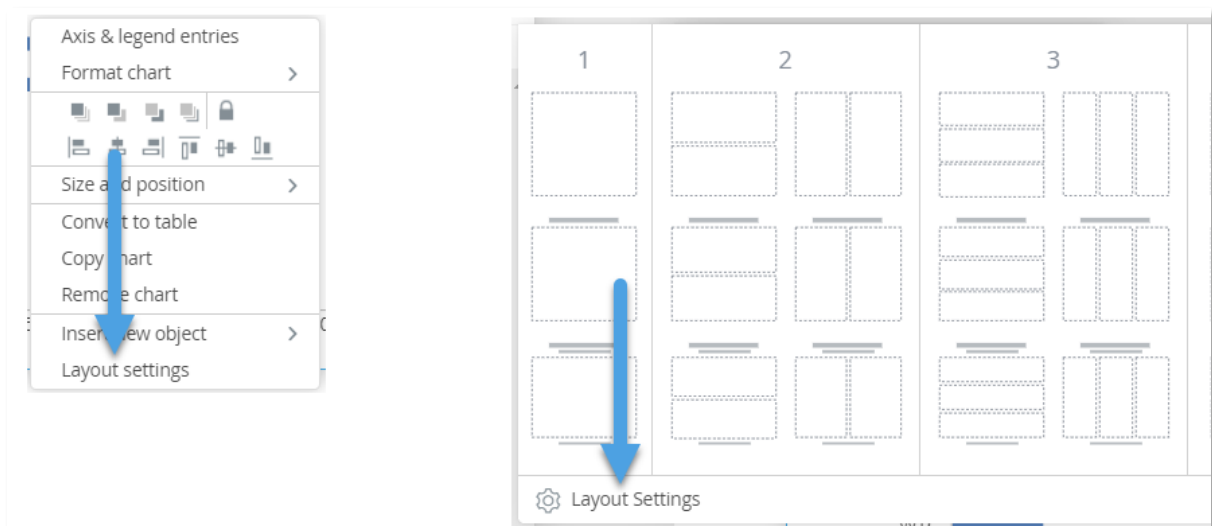
Here we see both the result tooltip and the export tooltips that now can be turned on/off.



Here we see the new Layout settings panel where you can turn tooltips on/off.



Here we show how to open the new Layout settings panel.



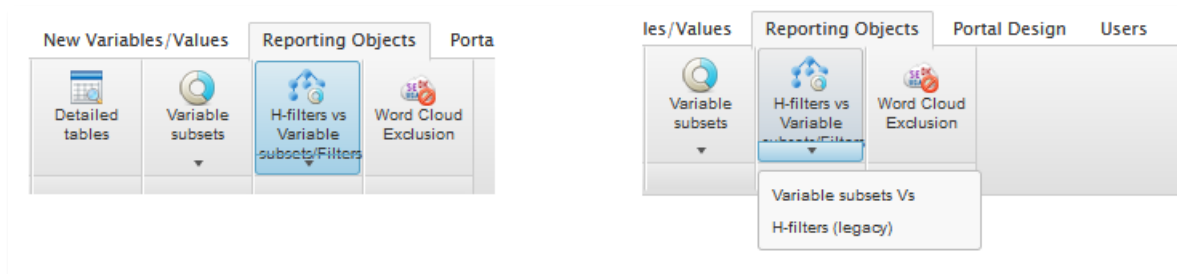
6 StoryTeller, Hierarchical filter vs Filters

A new page for setting up connections between Hierarchical filter nodes and Variable subsets were released earlier this year and the page has now been further improved to also support setting up connections between Hierarchical filter nodes and regular Filters.

By using this new function different filter options can be shown for different hierarchical nodes in the StoryTeller reports which allows you to, for example, have more filter options available when selecting a unit higher up in the organization compared to a unit further down. This new logic is, for instance, useful in EX projects where additional filtering should be supported on higher levels only to ensure anonymity rules are followed as additional filtering on lower levels can lead to anonymity issues from “backwards” calculations by the users.

You will now find the new page “H-filter vs Variable subsets/Filters” in the main menu. The old page, “Variable subset vs H-filters”, is now positioned in the sub-menu and in the longer perspective it will be removed and not available.

Here we see the new page in the main menu and the old one in the sub-menu.



Below you will see how to setup connections between Hierarchical filter nodes and filters. If you would like to know more about setting up connections between Hierarchical filter nodes and Variable subset check the April release notes available in the Release section in the Knowledge base within the Dapresy system.

6.1 Setup of connections between H-filter and Filters

In chapter 6.1.1 we describe how to create the connections between the Hierarchical filter and the Filters, in chapter 6.1.2 how to specify which filters to be shown/hidden for

respective hierarchical filter node via the online interface, in chapter 6.1.3 how to bulk create/edit the connections via Excel file uploads.

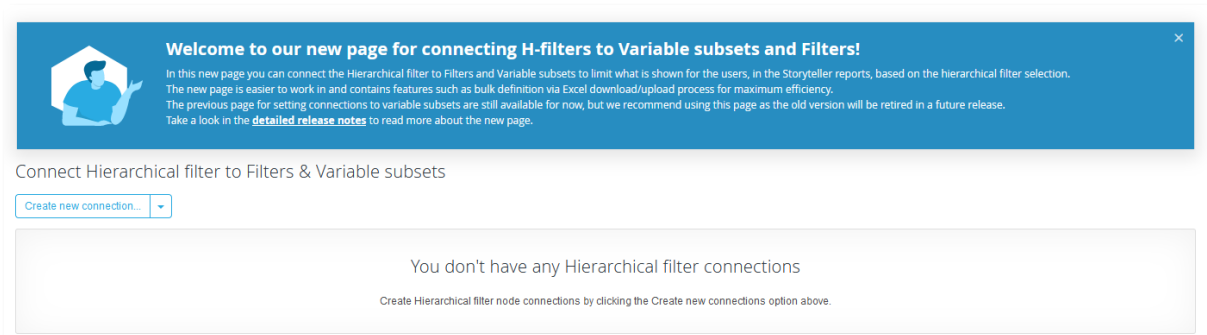
6.1.1 Create connections

By default, there are no connections between the Hierarchical filter and Variable subsets/Filters in your project so first you need to create the required connections. The following steps will create a connection:

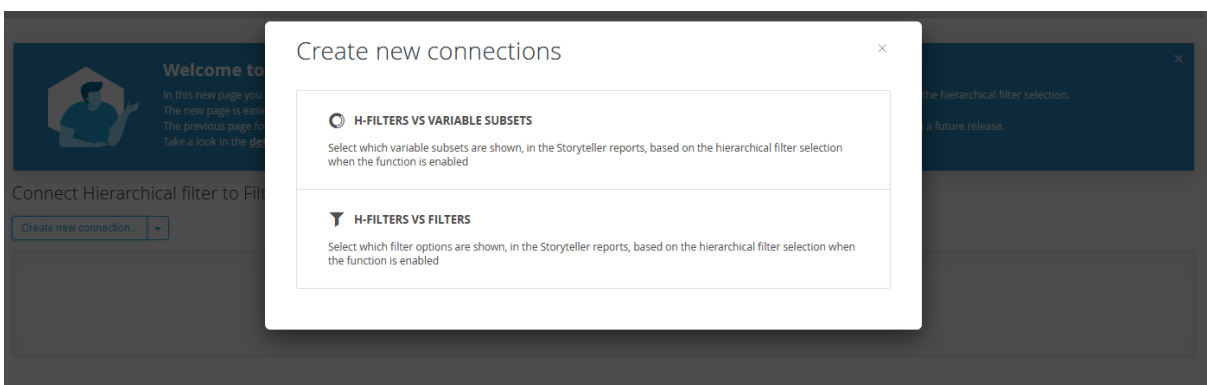
1. In the page Hierarchical filters vs Variable subsets/Filters click “Create new connections”
2. Select to connect the Hierarchical filter to the Variable subset or any Filter.

After you have created the connection you enter setup mode directly, see details in next chapter.

Here is the Hierarchical filters vs Variable subsets/Filters page before any connection is created, to create a connection via the Create new connection option.

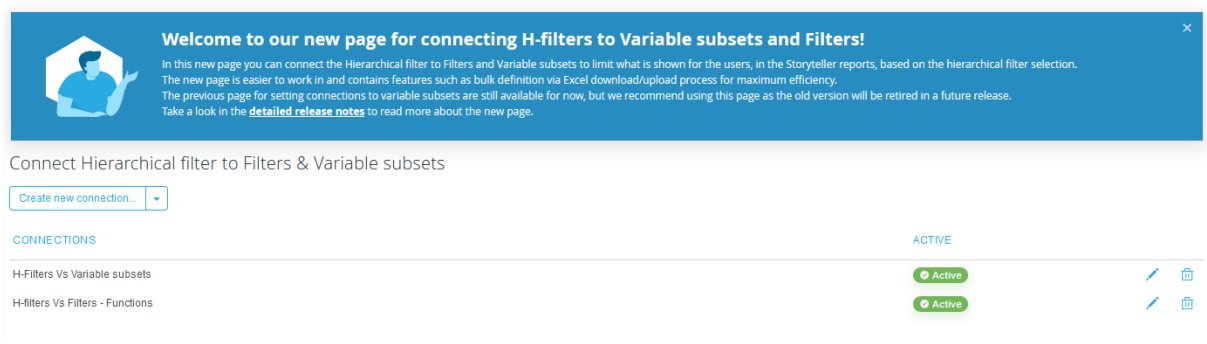


Select to connect the Hierarchical filter to Variable subsets or Filters when creating a new connection.



Next time you enter the page “H-filter vs Variable subsets/Filters” all your connections are listed in a grid and from here you can delete those or enter edit mode to change the connections.

Here we see the list of all created connections in a project.



Welcome to our new page for connecting H-filters to Variable subsets and Filters!

In this new page you can connect the Hierarchical filter to Filters and Variable subsets to limit what is shown for the users, in the Storyteller reports, based on the hierarchical filter selection. The new page is easier to work in and contains features such as bulk definition via Excel download/upload process for maximum efficiency. The previous page for setting connections to variable subsets are still available for now, but we recommend using this page as the old version will be retired in a future release. Take a look in the [detailed release notes](#) to read more about the new page.

Connect Hierarchical filter to Filters & Variable subsets

Create new connection... ▾

CONNECTIONS	ACTIVE		
H-Filters Vs Variable subsets	Active	/	🗑️
H-filters Vs Filters - Functions	Active	/	🗑️

6.1.2 Specify connections via user interface

To setup the connections between Hierarchical filter nodes and selected Filter variable, via the user interface, do the following:

1. Select the node in the hierarchical filter tree
2. Select the filter options to be connected by ticking “Connect” or “Selected by default” in the grid to the right
3. Repeat step 1 and 2 for all the nodes to be connected to Filters
4. Save

Here we see an example where the Function filter is connected to the Hierarchical filter, in this example we see that only the options No selection, Sales and Marketing will be available when Business unit B is selected by the users in the StoryTeller report. The No selection option is set to default option.

CONNECTED **SELECTED BY DEFAULT**

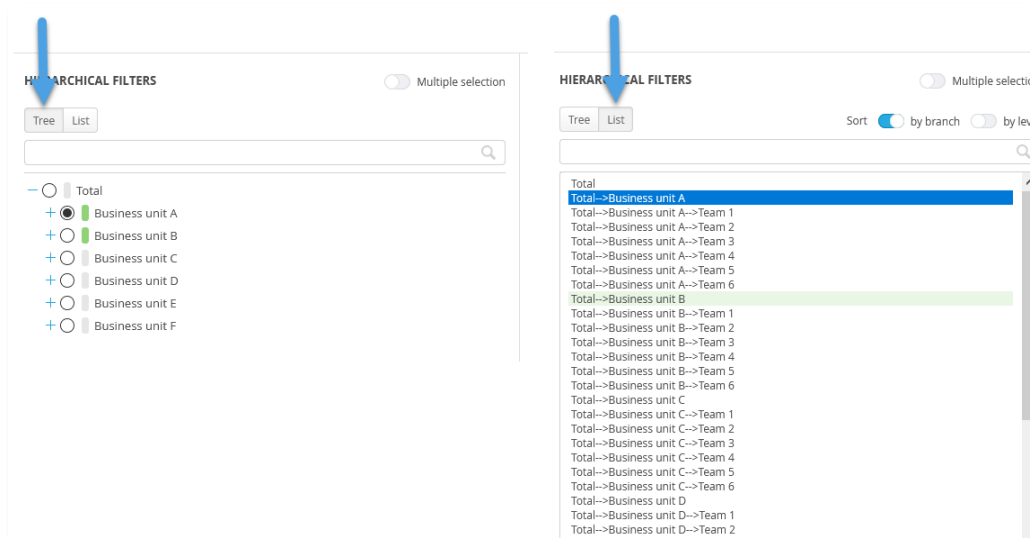
FUNCTIONS	CONNECTED	SELECTED BY DEFAULT
No selection	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
IT	<input type="checkbox"/>	<input type="checkbox"/>
Marketing	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Finance	<input type="checkbox"/>	<input type="checkbox"/>
HR	<input type="checkbox"/>	<input type="checkbox"/>
Operations	<input type="checkbox"/>	<input type="checkbox"/>
Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Note 1: if a filter option is set to default, it is selected by default when the end-user selects the hierarchical filter node in the StoryTeller. If no filter option is set to default, the already selected filter option is still selected if it is available, if it is not available the first available filter option becomes default selected.

Note 2: Hierarchical filter nodes without specified connections inherit the connections from the closest direct antecedent node (i.e. parent node, parent of parent node, etc. walking back up through the tree) that has defined connections.

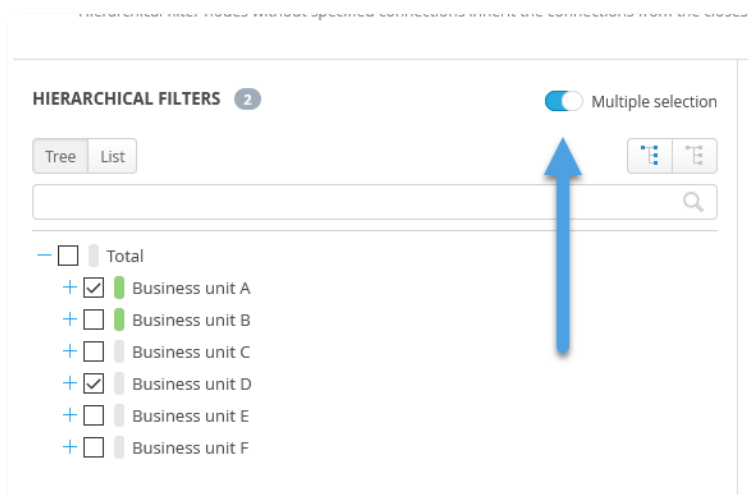
Tip 1 - the Hierarchical filters can be shown in either a tree view or as a list view as shown in the images below. When using the list view, you can also select if the nodes should be sorted by level or by branch.

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



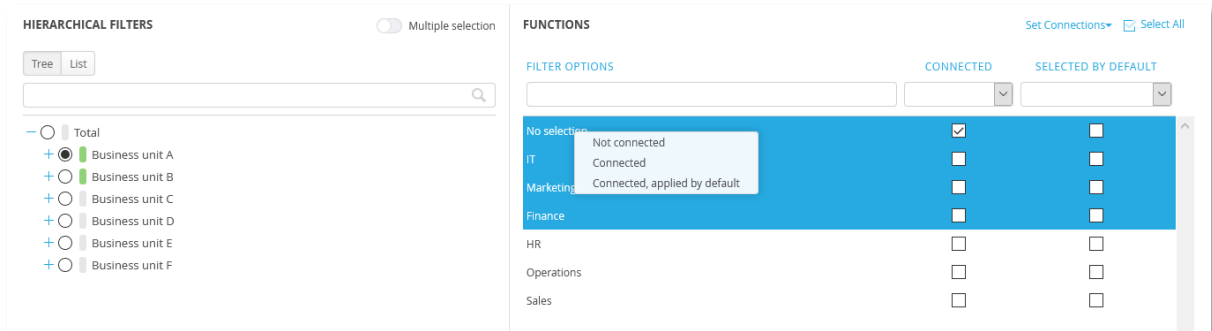
Tip 2 - if multiple hierarchical filter nodes need to be connected to the same filter options you can enable the multi selection support in the hierarchical filter selection. Though, use this option with care as it is easy to overwrite incorrect nodes if you do not untick all the nodes when selecting a new set of nodes.

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



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

Here the context menu used to apply same setting to all selected filter options.



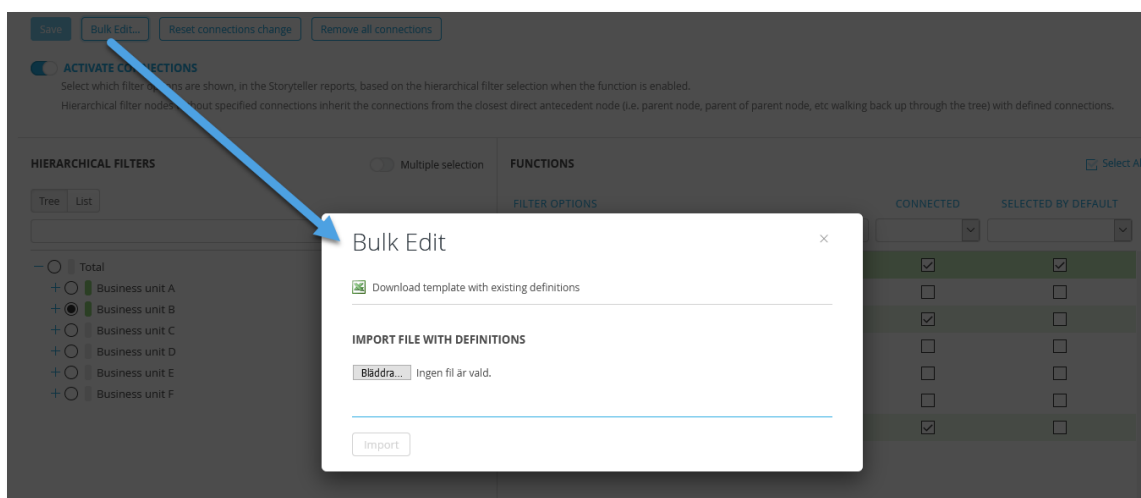
Tip 4 - you can clear all the specified connections by clicking “Remove all connections” options at the top, all created connections will be cleared then and you cannot undo the action, so use it with care.

6.1.3 Specify connections 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.



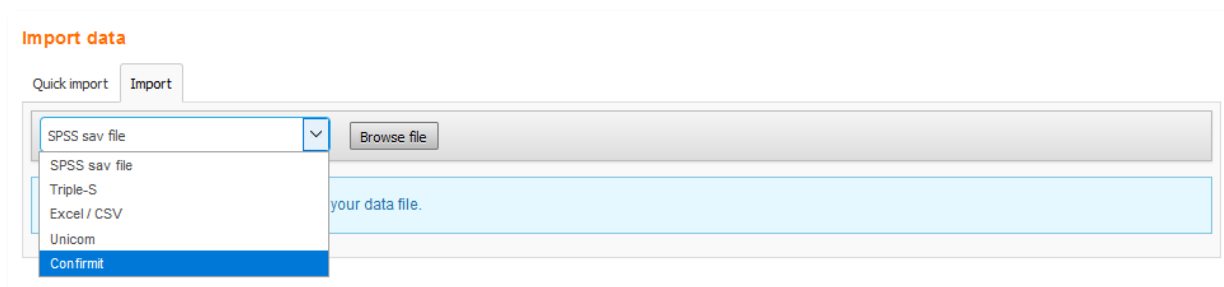
Here we see the downloaded Excel file. For each hierarchical filter node specify which filter options are to be connected and if any filter option should be selected by default.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Hierarchical Filters				Functions							
2	HFilterID	Path	Code	Name	F3_0 - No Selection	F3_151 - IT	F3_152 - Marketing	F3_153 - Finance	F3_154 - HR	F3_155 - Operations	F3_156 - Sales	
3	1	Total	HTotal	Total	Connected, selected by default	Connected	Connected	Connected	Connected	Connected	Connected	
4	2	Total->Business unit A	BgIncome1	Business unit A	Connected, selected by default	Connected	Connected	Not connected	Not connected	Not connected	Connected	
5	8	Total->Business unit A->Team 1	BgIncome1BgAgegroup1	Team 1	Connected, selected by default	Not connected	Not connected	Not connected	Not connected	Not connected	Not connected	
6	9	Total->Business unit A->Team 2	BgIncome1BgAgegroup2	Team 2	Connected, selected by default	Not connected	Not connected	Not connected	Not connected	Not connected	Not connected	
7	10	Total->Business unit A->Team 3	BgIncome1BgAgegroup3	Team 3	Connected, selected by default	Not connected	Not connected	Not connected	Not connected	Not connected	Not connected	
8	11	Total->Business unit A->Team 4	BgIncome1BgAgegroup4	Team 4	Connected, selected by default	Not connected	Not connected	Not connected	Not connected	Not connected	Not connected	
9	12	Total->Business unit A->Team 5	BgIncome1BgAgegroup5	Team 5	Connected, selected by default	Not connected	Not connected	Not connected	Not connected	Not connected	Not connected	
10	13	Total->Business unit A->Team 6	BgIncome1BgAgegroup6	Team 6	Connected, selected by default	Not connected	Not connected	Not connected	Not connected	Not connected	Not connected	
11	3	Total->Business unit B	BgIncome2	Business unit B	Connected, selected by default	Not connected	Connected	Not connected	Not connected	Not connected	Connected	

7 Import of Confirmit Horizon data

If you are using Confirmit Horizons as a data collection platform you can now import data, seamlessly, directly from any of your Confirmit Horizons surveys via the Data import page. Previously Confirmit Horizons data was always imported via the Import scheduler functionality but now using the new option to import directly from the Data import page the process is simpler in projects where you do not have a need for scheduled/continuously running data imports.

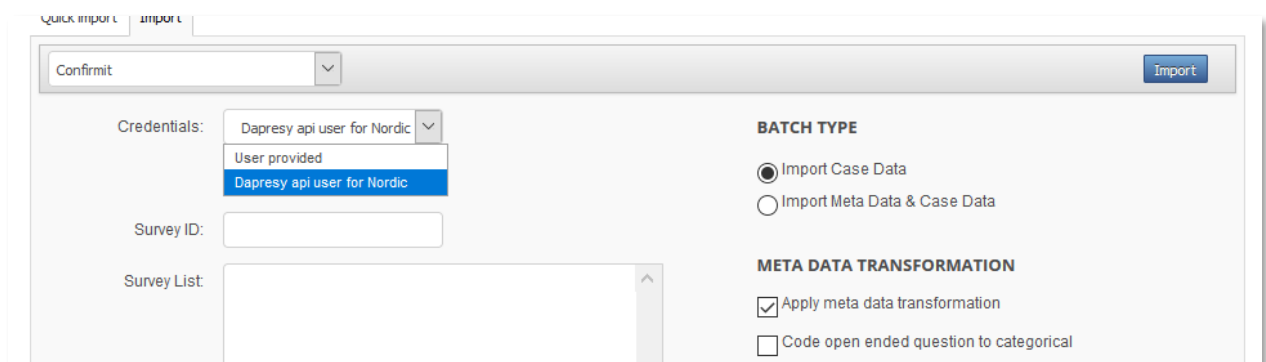
The new option to import data from any of your Confirmit surveys via the Data import page. You see this option only if your administrator account has access to Confirmit data integration, if you are using Confirmit Horizon but don't see this option contact support and they will assign the needed access rights to your account.



The screenshot shows the 'Import data' interface. At the top, there are two tabs: 'Quick import' and 'Import'. Below the tabs is a dropdown menu for file types, currently showing 'SPSS sav file'. A 'Browse file' button is to the right of the dropdown. Below the dropdown is a light blue box containing the text 'your data file.' The dropdown menu is open, showing a list of file types: 'SPSS sav file', 'Triple-S', 'Excel / CSV', 'Unicom', and 'Confirmit'. The 'Confirmit' option is highlighted in blue.

Like in the Scheduled data import page you can either enter your own credentials or use the credentials stored on your customer account meaning you don't have to enter your Base URL, Username and Password every time you import data from Confirmit Horizons platform. Dapresy support will maintain these credentials for you.

How to select what credentials to use, the list contains the User provided option and the options with pre-defined credentials stored on your customer account in Dapresy.



The screenshot shows the 'Import data' interface with the 'Confirmit' dropdown selected. Below the dropdown is a 'Credentials' section with a dropdown menu showing 'Dapresy api user for Nordic', 'User provided', and 'Dapresy api user for Nordic'. The 'Dapresy api user for Nordic' option is highlighted. Below the credentials section is a 'Survey ID' input field and a 'Survey List' input field. To the right of the 'Survey ID' and 'Survey List' fields is a 'BATCH TYPE' section with two radio buttons: 'Import Case Data' (selected) and 'Import Meta Data & Case Data'. Below the 'BATCH TYPE' section is a 'META DATA TRANSFORMATION' section with two checkboxes: 'Apply meta data transformation' (checked) and 'Code open ended question to categorical' (unchecked). An 'Import' button is located at the top right of the form.

8 Report user management

8.1 Limit login methods

Users accessing the system via Single Sign on have always also been able to access the system via the login page (i.e. with a password) but now you can specify, on a user level, what login method the user should have access to (SSO or both SSO and Login page). By not allowing the user to use a password when there is an SSO solution implemented, it prevents the possibility that the user circumvents SSO authentication by using a password after leaving the organization. The login method selections can be applied to both Report users and Administrator users.

Note 1: all existing users created before support for limiting login methods was released have both methods enabled (Login page and SSO)

Note 2: a newly created user has by default both methods (login page and SSO) enabled.

Note 3: A Report user with access to create new Report Users, via the Report user management report, does not have access to set login method. The login method of the logged in Report user is applied automatically to the newly created user.

8.1.1 Setup

The option for limiting login methods is located in the User Details section when creating and editing users. The methods can also be set via the Excel uploads of users.

Here we see the new setting for limiting login methods.

USER DETAILS

User name (ID for Single sign on) Email

First Name Last Name

Password Confirm Password

* if left empty user will have to create password before accessing the system

Dates for project access

Set dates for project access

Allowed login methods

Login page

Single Sign-On

ⓘ Enabling Single sign on requires there to be a SSO solution in place. If your system is configured with a single sign on solution and you do not want users to have the option to log in with a password then disable 'Login Page'. This will prevent users logging in without using the SSO, for instance if they leave the organization. Disabling 'Login Page' when there is no SSO will mean the user can not log in at all

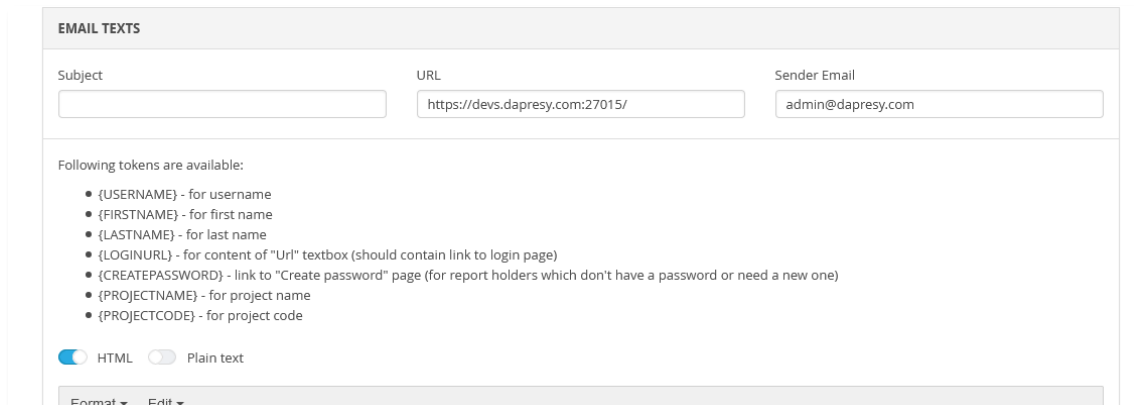
Here we see the two the new columns, F and G, in the Excel file used to bulk upload users.

	A	B	C	D	E	F	G	H
1	User details							
2	User name	First name	Last name	Email address	Password	Login page	Single Sign-On	Default language
3								
4						Access		
5						No Access		

8.2 Project name/code token in invite emails

The User invite email now supports tokens for project name and project code (tokens are automatically filled with the text by the system when the email is sent).

Here we see the new Project name/code token in the list of available tokens. Use these to insert the project name or code automatically in the invitation emails.



The screenshot shows a web interface for configuring email texts. At the top, there's a header "EMAIL TEXTS". Below it, there are three input fields: "Subject" (empty), "URL" (containing "https://devs.dapresy.com:27015/"), and "Sender Email" (containing "admin@dapresy.com"). Below these fields, there's a section titled "Following tokens are available:" with a bulleted list of tokens: {USERNAME} - for username, {FIRSTNAME} - for first name, {LASTNAME} - for last name, {LOGINURL} - for content of "Url" textbox (should contain link to login page), {CREATEPASSWORD} - link to "Create password" page (for report holders which don't have a password or need a new one), {PROJECTNAME} - for project name, and {PROJECTCODE} - for project code. At the bottom of this section, there are two toggle switches: "HTML" (checked) and "Plain text" (unchecked). Below the toggles, there are two dropdown menus: "Format" and "Edit".

9 Project administration navigation updates

The legacy pages listed below are now removed from the main menu as all these features are covered by the new Questions page released earlier this year.

- Questions page legacy
- Sort order Questions – New variables
- Question blocks
- Sort order Questions blocks
- Answer blocks
- Sort order Answers - Grouped answers
- Filters
- Sort order Filters

The pages can though still be used and now you find these pages in the sub menu to the Questions page, see image below. The pages will be removed completely in a future release.

Here you can find all the legacy pages.

