Forsta Visualizations December 2022 Release

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1 Introduction

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

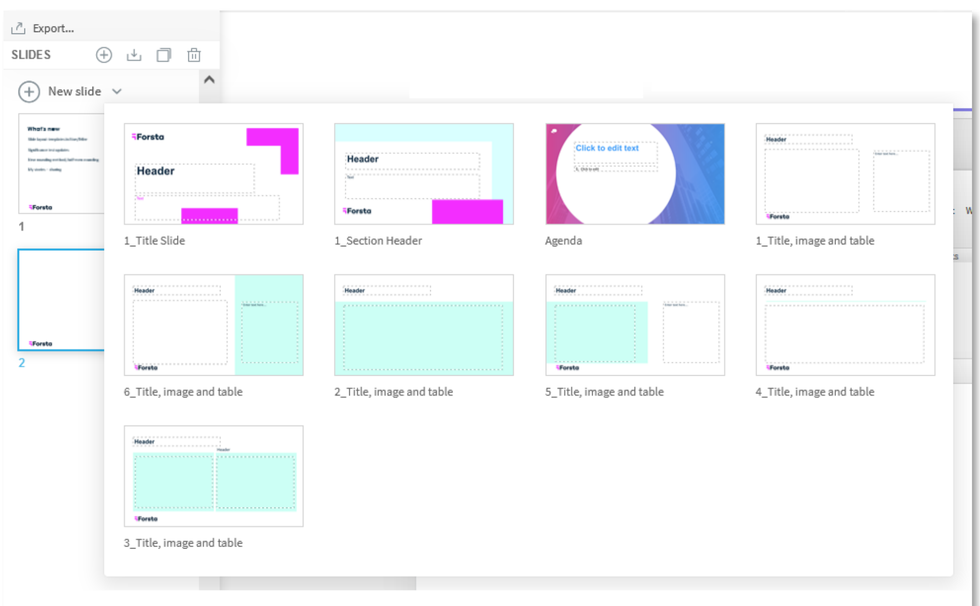
If you would like to know more about these features, please contact the support team at visualizationsSupport@forsta.com and they will be able to assist you.

Best Regards,
Forsta Team

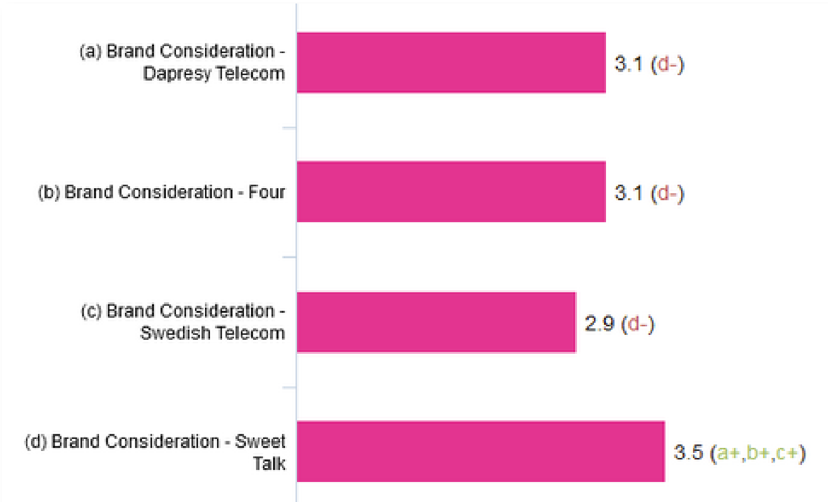
2 Overview

StoryTeller

- You can now use a new function in StoryTeller to create slide layout templates by uploading a PowerPoint layout master template. This makes it easier to match corporate branding and create sophisticated layouts. Just like in PowerPoint, you can choose from any available slide layout template to start with when creating a new slide. The placeholders, such as charts, tables, and text boxes, added to the master templates will be added as objects to the slide and have the same positions as in the master template. This streamlines the process of report creation.
  Here is an example of slide layout templates in StoryTeller



- The significance test result symbols in charts can now be set to specific colours for a clearer visualization, below we see an example.



- Significance testing between series in StoryTeller charts and tables is further improved to support more complex comparisons when text matching between series is used, you can now specify which parts of the labels to use for the text match.

- A new auto-height option is available in text boxes for entering longer texts easier. The text box resizes automatically based on content when the auto-height option is enabled.

StoryCreator

- The new auto-height option described above is also available in StoryCreator.

My Stories

- Sharing is now available in the My Stories which allows an Administrator user or a Report user to share a created story to one or many other users. Access rights to filters, hierarchy units etc. are always considered in the sharing process so a user can only access shared stories with data they are allowed to see.
  The ability to share stories can be turned on/off on My Stories report level (same logic as workbook sharing in Crosstable tool).

Calculation

- Half-even rounding, often called bankers' rounding, is implemented as an additional rounding method. The rounding method applied is a project level setting and applied to all calculations in all the report types.

Report user management

- You can now schedule when changes in Report user access rights should take effect. The new logic is an addition to the Excel upload of user access rights, after file upload you select to "activate" the changes now or later by setting a future date and time.

- A Report user Invitation can now be created, and edited, without attached users. Without users a saved Invitation can be used as template when new invitations should be sent out which results in a more efficient process in projects where users are added continuously.

- The Report users tags used for a more efficient user administration is now also available in the following four user administration pages used for bulk edits : Tab vs Users, Filter vs Users, Variable subset vs Users and H-filter vs Users.

Data exports

- SPSS exports are now faster, this is especially noticeable in bigger projects.

Project Administration

- Variable subsets can now be copied for a more efficient process.

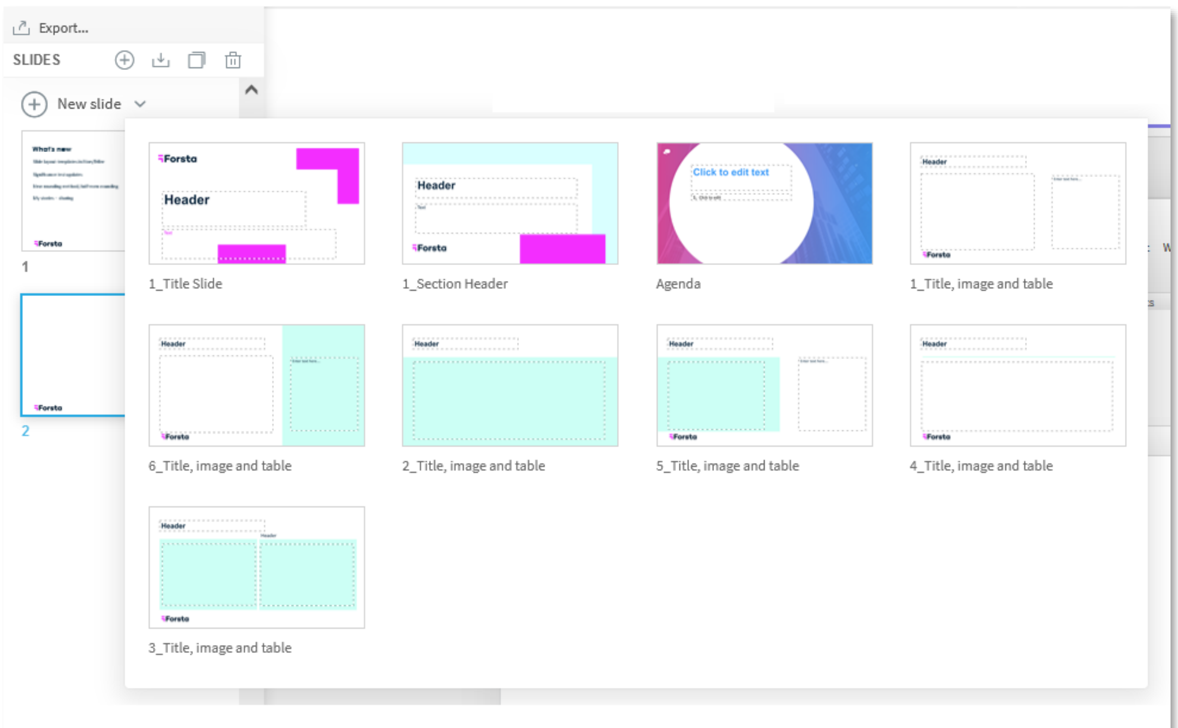
3 StoryTeller

3.1 PowerPoint layout master template support

You can now create slide layout templates in StoryTeller by uploading a PPT layout master template which improves the process of report creation, it becomes easier to match corporate branding and creation of sophisticated layouts.

Just as in PowerPoint you can select any available slide layout template to start off with when creating a new slide. The different placeholders such as charts, tables, text boxes added to the Master templates will be added as objects to the slide and have same positions as in the Master template which makes the report creation easier.

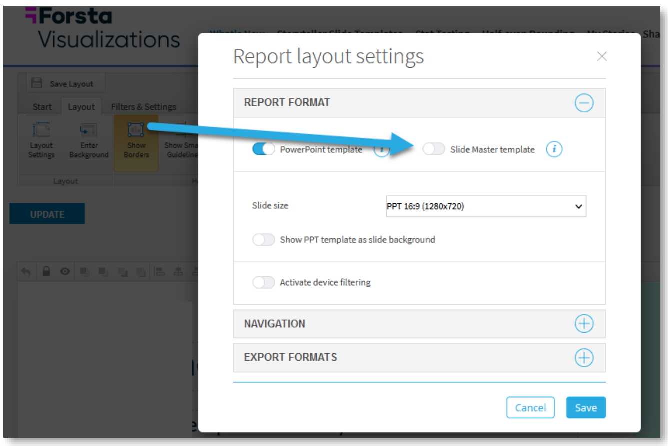
Here is an example slide layout templates in StoryTeller



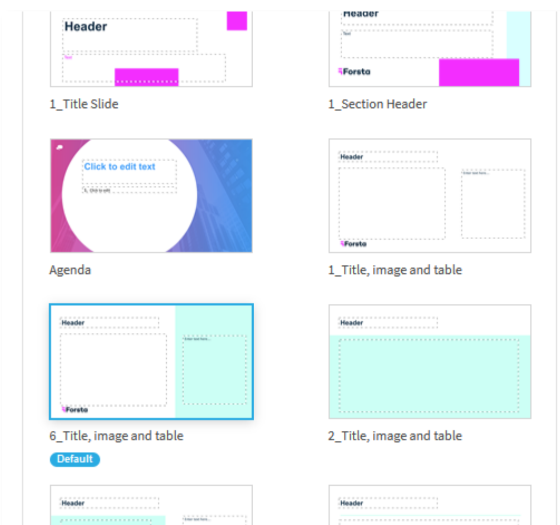
3.1.1 Upload layout master template

To use your own layout master template in a StoryTeller report do as the following:

- Enable the Layout master template functionality located in the Layout settings/Report Format panel.



- Upload the Power point file containing the layout master template.
- After upload all available layout templates are listed, select the layout template to be default selected when adding new slides to the deck. Below we see that the layout named "6_Title, image and table" is set to default.



- Save

The uploaded layout templates are now shown in the “Layout” and “New slide” panel and ready to be used.

Note: All StoryTeller reports with “Slide master template” function enabled shares the same master template, you cannot upload different PowerPoint files to different StoryTeller reports.

3.1.1.1 File format

The following file types are accepted:

- .ppt
- .pptx
- .pot
- .potx

The following placeholders in the layout templates are supported:

- Multi object
- Text box
- Chart
- Table
- Image

If other placeholders such as Video and Smart art placeholders are included in the uploaded file these will be transformed to “multi objects” as these are not supported in StoryTeller.

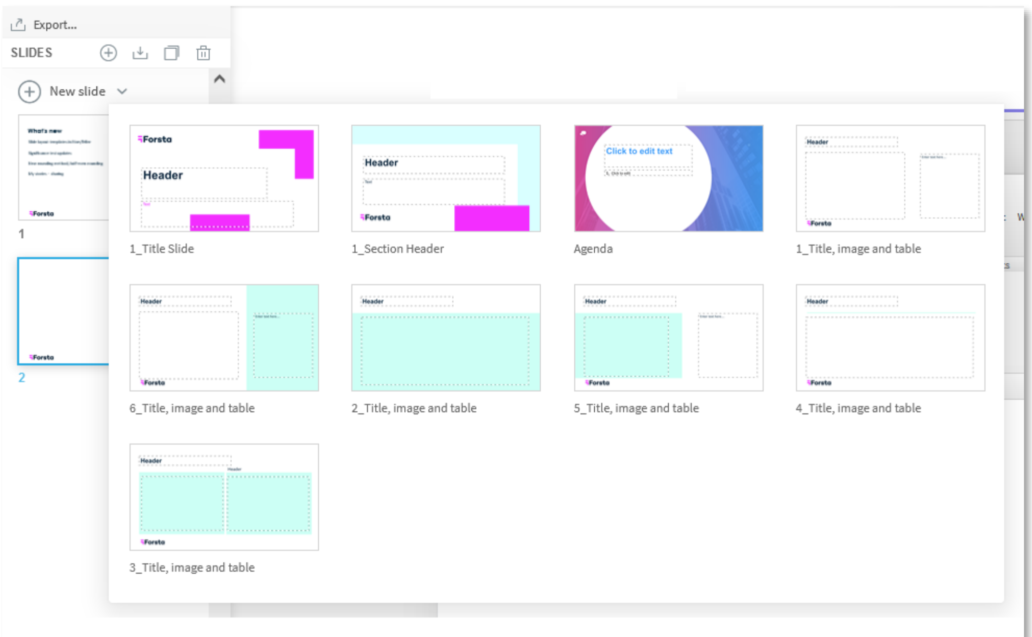
If the uploaded file contains regular slides these will not be shown online but are included in PowerPoint exports and position first in the exported PowerPoint document. This logic can, for example, be used to incorporate a front page, or a whole introduction section, shown in exports but not online.

Only one layout master template file can be used at a time. If a new file is uploaded, already saved slides will be using the new slide master layout instead of the previous one. In PowerPoint each layout template has a name which is used for mapping old to new. If any saved slide is connected to a layout template not existing in the newly uploaded layout master, these slides will be using the default layout.

3.1.2 Use layout templates

The uploaded layout templates are shown in the Layout panel as shown below. A Layout template can be selected when adding a new slide or when editing an existing slide. Just like in PowerPoint the different placeholders such as charts, tables, text boxes in the selected layout template will be added as objects to the slide and have same positions as in the uploaded Master template which makes the deck creation easier.

Here we see how to select a layout template to be applied when adding a new slide.

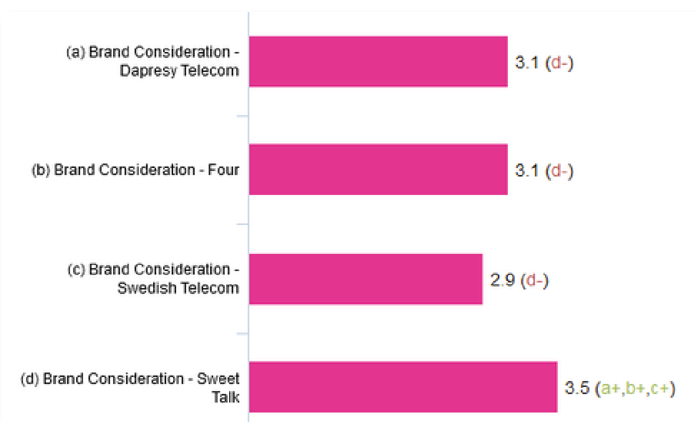


Note: If you change layout template of an existing slide the background of the newly selected layout is applied and objects are repositioned based on placeholder position in the selected layout. If the new layout contains more objects new objects are added, if the new layout contains less objects all the objects are kept as no object is deleted automatically.

Below we see an example where the slide contains a header and a chart, a new layout template is selected so the existing chart are repositioned and a new empty object added

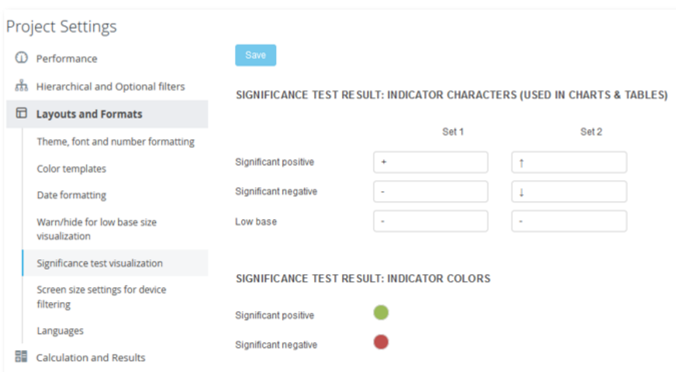
3.2 Coloring of significance test symbols in charts

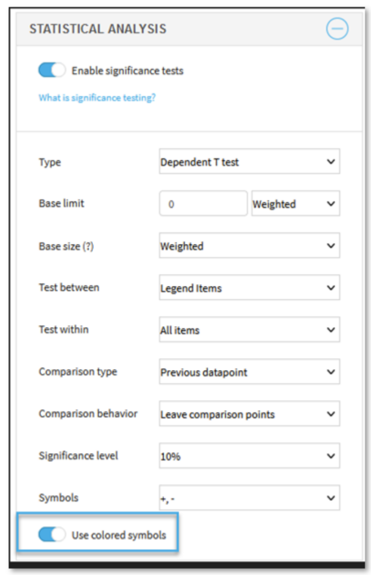
The significance test result symbols in charts can now be set to specific colours for a clearer visualization, below we see an example.



To color the symbols activate the new “Used colored symbols” toggle located in bottom of Statistical analysis panel. The positive and negative colors are defined in Project settings page, the selected colors are used for symbols in charts but also for coloring of significance test result in tables which already was supported. A change of color is applied to all colored significance test visualizations in both charts and tables.

Below is the color definition shown to the left and the toggle for applying it to charts to the right.





Note; in first version the colored symbols are supported in editable PowerPoint exports and when whole slide is exported as single image.
When exporting as separate images (one per object on slide) the symbols use the color of the data value. Support for applying the colored symbols to object by object image export will come later.

3.3 Significance testing between series - new text match options

Significance testing between series in StoryTeller charts and tables is further improved to support more complex comparisons when text matching between series is used, you can now specify which parts of the labels to use for the text match.

When applying a test between series and using "text match" to map the values between the series you can now specify any of the options below:

- Last label - the previous and default option
- Visible label - new option
- Full label - new option

Explanation to "Full label": A "full label" is a label that consists of multiple levels of labels, some of which may not be visible to the user. For example, in a hierarchical data structure, a full label might include both visible and hidden levels of labels that represent different levels of grouping within the data.

For example, consider a dataset that includes awareness data for different regions, countries, and brands. The full label for a particular brand might include the labels for the region and country that the brand data is split on, as well as the label for the brand itself. Some of these labels, such as the region and country labels, might not be visible to the user, but they are still part of the "full label" and can be used to provide context and additional detail about the data to correctly match groups as required.

See examples and use cases for each of these options below.

Last label

Below is an example table with two series. As the columns have different sort order a text match in columns must be applied to get correct comparison.

The text match option "Last label" is applied so "Sweden" is mapped to "Sweden" and "UK" to "UK".

	Spontaneous brand awareness - Top of mind	
	(a) UK	(b) Sweden
Dapresy Telecom	19.5 (d+)	30.7 (c+)
Four	13.5	4.7
Swedish Telecom	4.7	10.0
	Spontaneous advertising awareness - Top of mind	
	(c) Sweden	(d) UK
Dapresy Telecom	4.6 (b-)	1.1 (a-)
Four	12.8	8.1
Swedish Telecom	4.0	3.9

The option "Full label" and "Visible label" cannot be used in the example above as the series shows result for different questions.

Visible label

Below is an example table with two series. The italic column labels "Pre-test" and "Post-test" are part of setup but shown for reference only, these are hidden in table.

As the columns have different sort order a text match in columns must be applied to get correct comparison. The text match logic "Visible label" is used so "Sweden/Segment A" is mapped to "Sweden/Segment A" and so on.

Pre-test					
Sweden			UK		
(a) Segment B	(b) Segment A	(c) Segment C	(d) Segment A	(e) Segment C	(f) Segment B
3.6	3.4	3.3 (i+)	3.3	3.0	2.6
Post-test					
Sweden			UK		
(g) Segment B	(h) Segment A	(i) Segment C	(j) Segment C	(k) Segment B	(l) Segment A
3.6	3.6	2.6 (c-)	3.2	3.1	2.7

The option "Last label" cannot be used in the example above as multiple columns have same last label. The option "Full label" cannot be used as the hidden labels (Pre-test and Post-test) are not the same.

Full label

Below is an example table with two series. The italic column labels "Sweden" and "UK" are part of setup but shown for reference only, these are hidden in table.

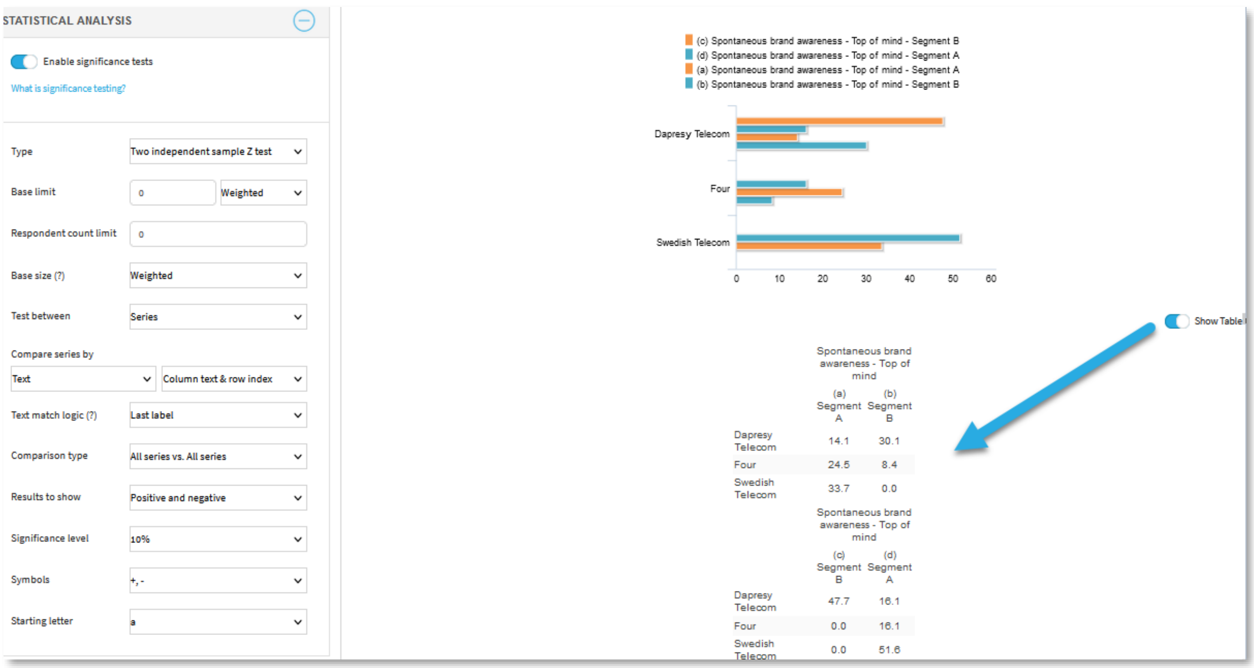
As the columns have different sort order a text match in columns must be applied to get correct comparison. The text match logic "Full label" is used so "Sweden/Swedish Telecom" is mapped to "Sweden/Swedish Telecom" and so on.

	Sweden			*UK*		
	(a) Swedish Telecom	(b) Four	(c) Dapresy Telecom	(d) Swedish Telecom	(e) Four	(f) Dapresy Telecom
Spontaneous advertising awareness - Top of mind	3.9	8.1	1.1 (e-)	4.0	12.8 (c+)	4.6
	Dapresy Telecom	Swedish Telecom	Four	Dapresy Telecom	Four	Swedish Telecom
Spontaneous brand awareness - Top of mind	30.7	10.0	4.7	19.5	13.5	4.7

The option "Last label" and "Visible" cannot be used in the example above as multiple columns have same last/visible label.

All the text matching logic described above is also applicable to charts with multiple series. Tip: enable “Show table” in the chart setup as the label structure is easier to see in tables than charts.

Chart setup mode, enable “Show table” to more easily see the label structure.



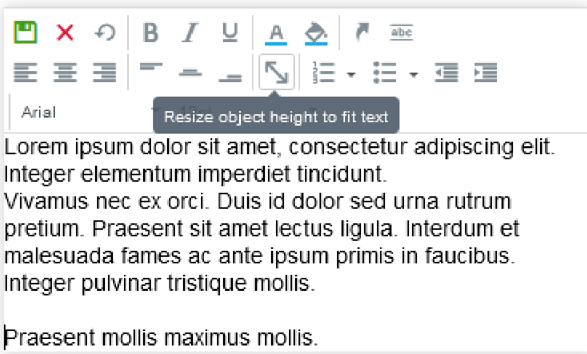
	Spontaneous brand awareness - Top of mind	
	(a) Segment A	(b) Segment B
Dapresy Telecom	14.1	30.1
Four	24.5	8.4
Swedish Telecom	33.7	0.0

	Spontaneous brand awareness - Top of mind	
	(c) Segment B	(d) Segment A
Dapresy Telecom	47.7	16.1
Four	0.0	16.1
Swedish Telecom	0.0	51.6

3.4 Auto-height setting in Text box

A new auto-height option is available in text boxes for entering longer texts easier. The text box resizes automatically during editing based on content when the auto-height option is applied.

Below you see new setting for enabling/ disabling the new Auto-height setting.

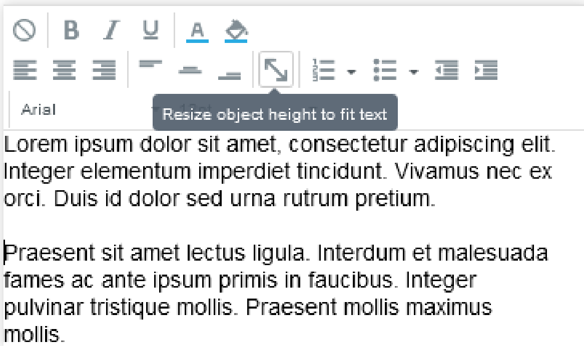


4 StoryCreator

4.1 Auto-height setting in Text box

A new auto-height option is available in text boxes for entering longer texts easier. The text box resizes automatically during editing based on content when the auto-height option is applied.

Below you see new setting for enabling/disabling the new Auto-height logic.



5 My Stories

5.1 Sharing

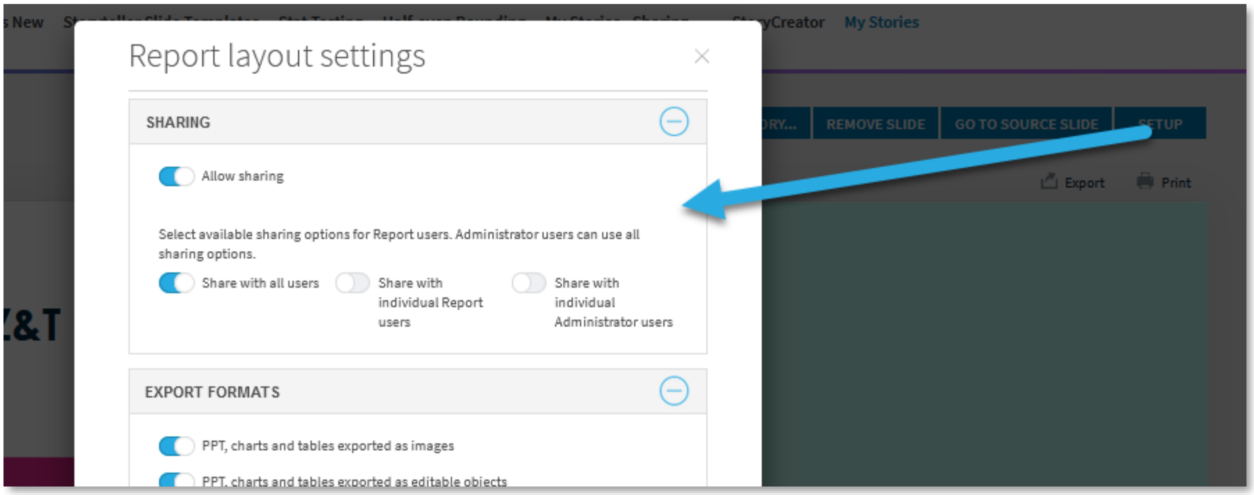
Sharing is now available in My Stories which allows an Administrator user or a Report user to share a created story to one or more other users. The new sharing function uses the same logic as workbook sharing in the Cross Table tool, meaning that:

- The Administrator user can enable or disable the ability to share stories. All existing My Stories reports have sharing disabled by default, but newly created My Stories reports have sharing enabled by default. For more information about the setup, see the relevant chapter.
- When sharing is enabled, users can share a story with all other users or with selected Report or Administrator users. When sharing a story to all users only the users with access to all the items (Reports, Hierarchical filters, Filters and Variable subsets) in the story can see and load the shared story.
- When sharing a story with selected users, you can only share with those who have access to all the items in the story.

5.1.1 Enable/Disable sharing - a My Story report level setting

On the My Story Setup page the Administrator user can enable and disable sharing on a My Story Report level. All the existing My Story reports have sharing disabled by default but newly created reports have sharing enabled by default.

The new sharing settings in My Stories Setup panel.



Note 1. When sharing is enabled, Administrator users can use all sharing options. For example, an Administrator user can share with another Administrator user even if Report users do not have the rights to do so

Note 2: If Report users can share with any Administrator users, they will see all Administrator users with access to the project; the list cannot be limited to a subset of Administrator users.

Note 3. When sharing with specific users, only those with access to all the items in the story will be shown in the list. A story can only be shared with users who have access to all its content. Access rights to the following are considered:

Reports: access to the reports of the slides in the story

Hierarchical filters: Access to the hierarchy nodes applied to all the slides in the story.

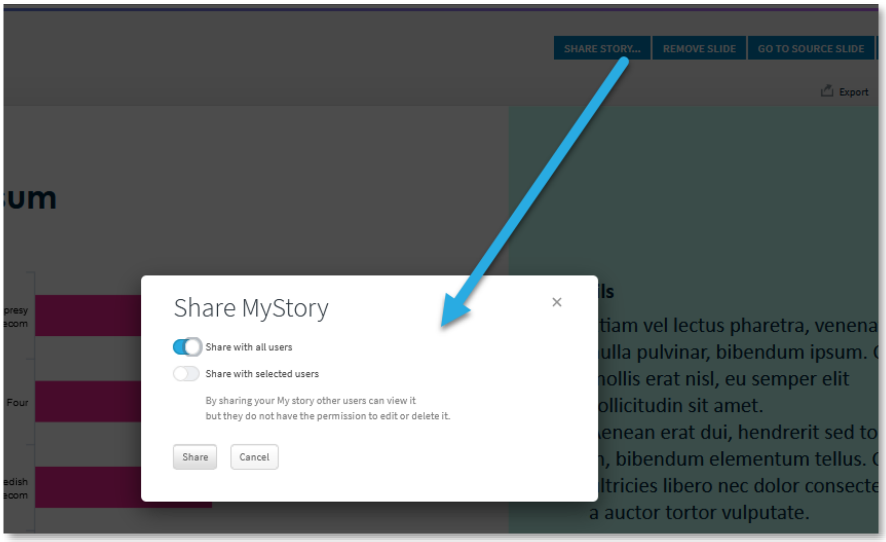
Optional filters: access to all the Optional Filters applied to the slides in the story.

Variable subsets: access to all the Variable subsets applied to the slides in the story.

5.1.2 Share a story to other users

A saved story is shared to other users in the new Sharing panel shown below. After enable sharing, select to which users to share the story.

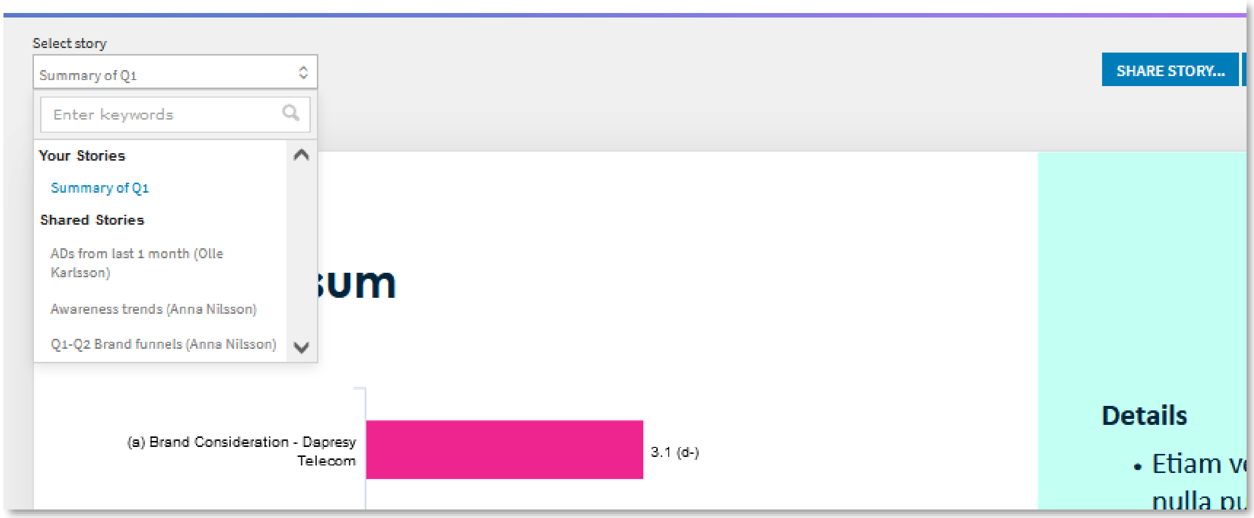
This is the sharing panel



5.1.3 Open a shared story

To open a story shared by another user open the list of available Stories, in the top section you see your own saved stories and in the bottom section, all the stories shared with you.

This is the list of available stories. Your own stories are shown at the top, and shared stories are shown at the bottom. The name of the user sharing a story is shown in *brackets.*


Select story
Summary of Q1
SHARE STORY...
Enter keywords
Your Stories
Summary of Q1
Shared Stories
ADs from last 1 month (Olle Karlsson)
Awareness trends (Anna Nilsson)
Q1-Q2 Brand funnels (Anna Nilsson)
(a) Brand Consideration - Dapresy Telecom
3.1 (d-)
Details

6 Calculation updates

6.1 Half-even rounding

Half-even rounding, also known as bankers rounding, has been implemented as an additional rounding method. This method rounds halfway values to the nearest even number.

Examples of half-even rounding when rounding to integer:

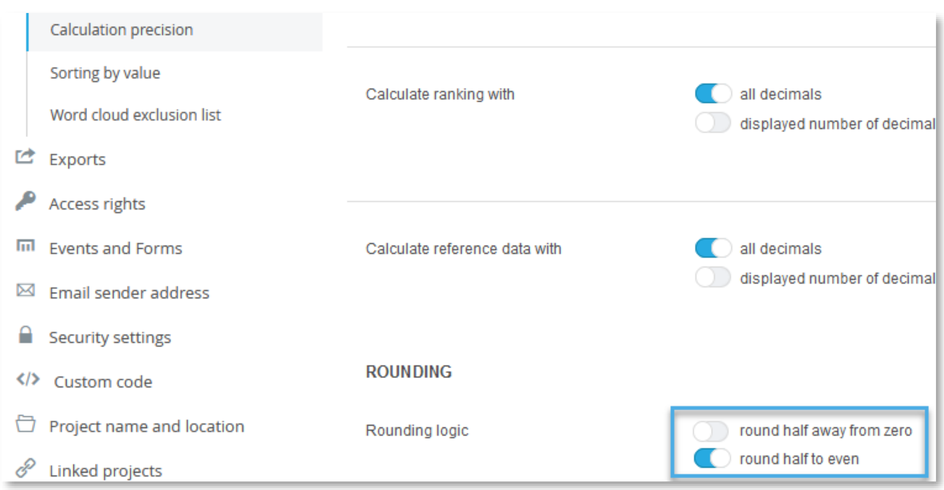
- 2.500000000000000 → 2
- 2.501210000000000 → 3
- 3.500000000000000 → 4

Examples of half-even rounding when rounding to one decimal place:

- 2.550000000000000 → 2.6
- 2.556210000000000 → 2.6
- 2.650000000000000 → 2.6

The applied rounding method is a project level setting and applied to all calculations in StoryTeller (including Respondent table), Crosstable Tool and StoryCreator.

To apply half-even rounding go to Project settings page/Calculations and Result menu a activate "round half to even" in the new rounding section.



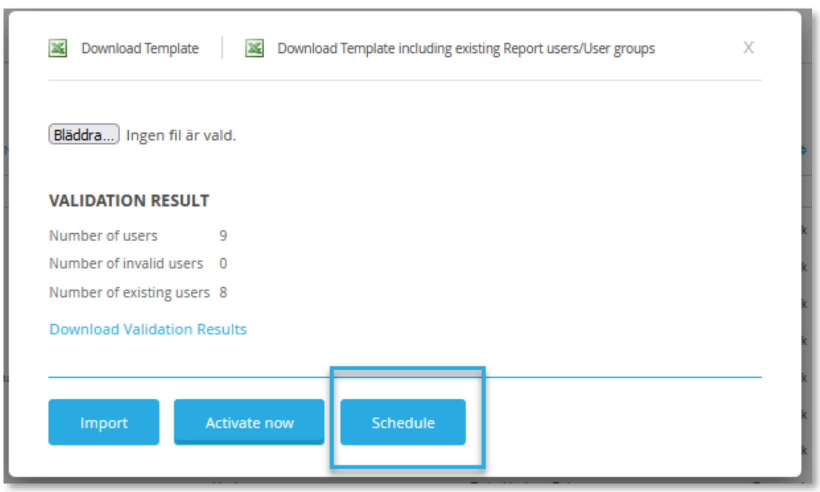
7 Report user management

7.1 Schedule activation of changed access rights

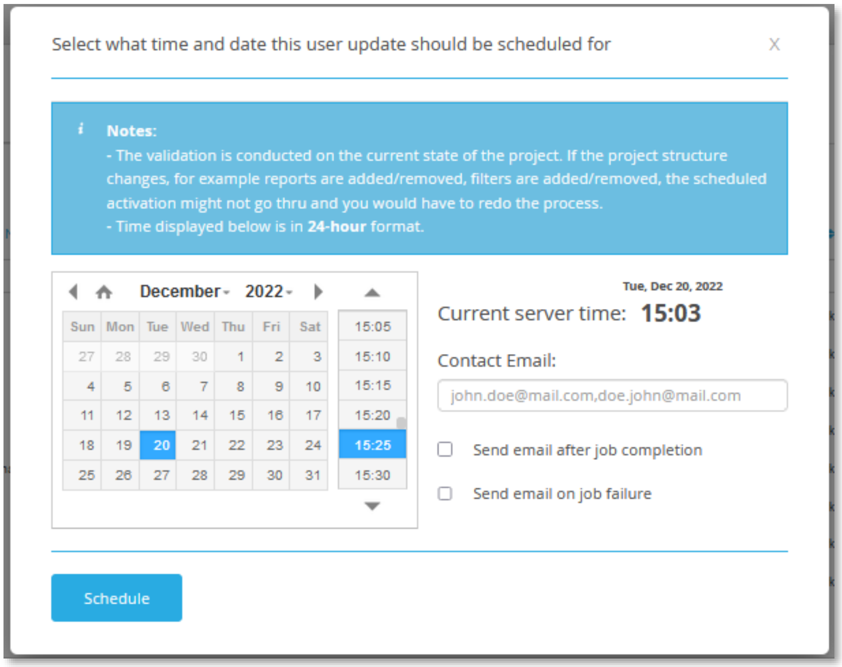
You can now schedule when changes in Report user access rights should take effect. The new logic is an addition to the Excel upload of user access rights, after file upload you select to “activate” the changes now or later by setting a future date and time.

To schedule the activation of changes in user access rights do as the following:

- Upload the Excel file with new and changed Report users as usual
- After successful file validation, choose “Schedule” instead of “Activate now”

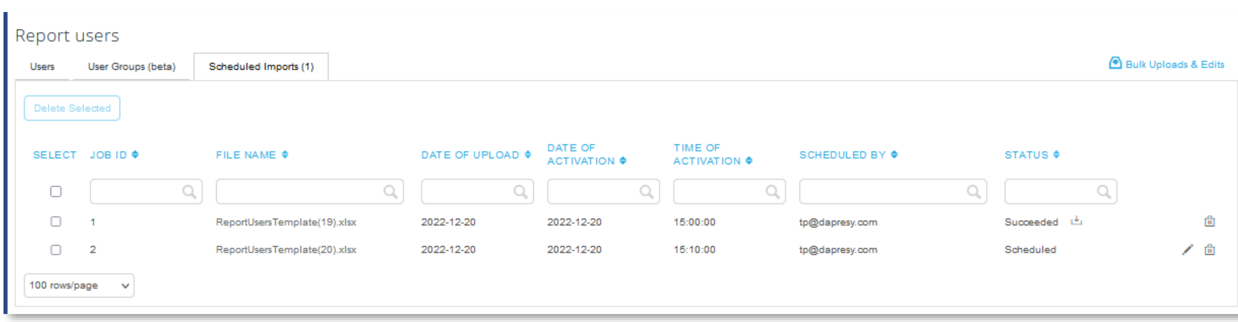


- Define the date and time for the scheduled activation occasion. Note, 24 hour clock and server time is used for time definition. The current server time is shown beside the time selection controls for your reference.
- Enter email address for job completion/failure notifications



- Click Schedule to save.

The created schedules can be accessed in the new tab "Scheduled imports" as shown below.



The Status column shows if the job is in "scheduled" stage or if already run ("Succeeded" / "Failed"). The already run jobs are shown in the list for reference, those can be deleted without effecting the access rights of the users in the project.

A scheduled, but not yet run, job can be edited and deleted/canceled from this view, use the edit/delete icons to the most right in the grid.

To download the uploaded file click the file name in File name column. The validation file can be downloaded after a job is run by clicking the download icon in the status column.

Note 1: An additional validation of the Excel file runs in the moment of the activation. If file is no longer valid due to changes in the portal since first validation the activation will fail. It is recommended to not delete reports, variable subsets, hierarchy nodes etc. after a schedule has been created as that potentially can result in validation errors.

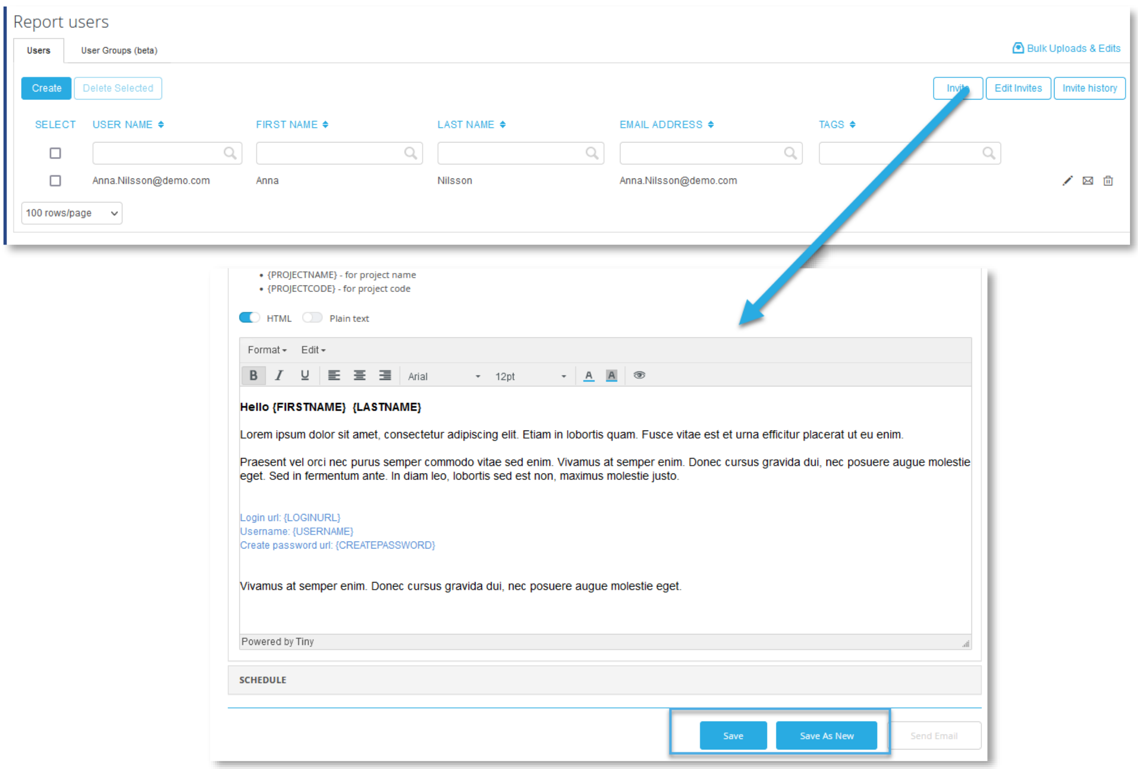
Note 2: it is not supported to schedule two or more activations, in same project, at same start time. It needs to be 10 minutes between two jobs.

Note 3: It's not supported to import a new user to two or more projects at the exact same time. If a new user needs to be added to for example two projects always set different activation times.

7.2 User invite updates

It is now possible to create and edit a Report user invitation without attaching any users. This saved invitation can then be used as a template when sending out new invitations, which streamlines the process in projects where users are continually being added.

Here we see how to both the Invite and Save options are enabled without users selected, previously these options could only be used when users were attached.

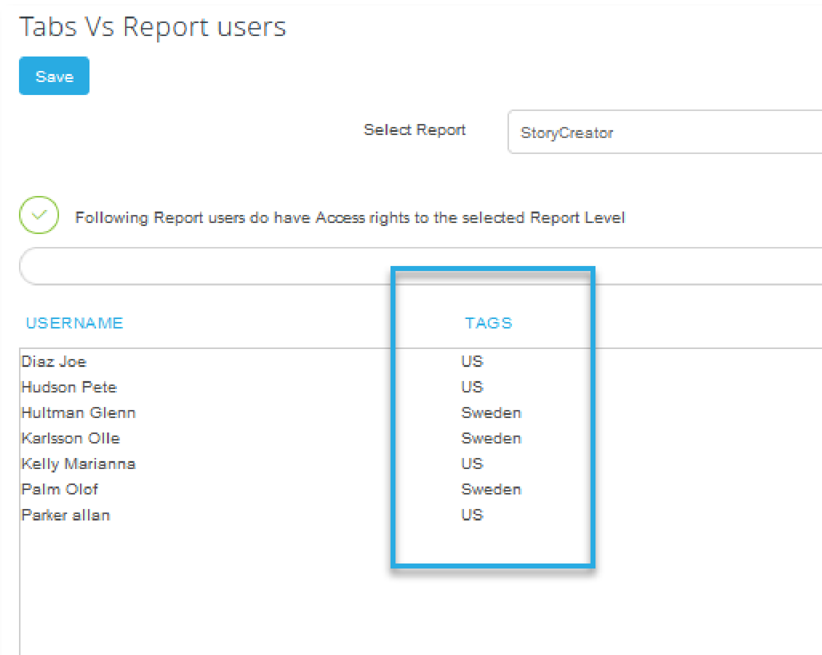


7.3 Use of tags in pages for bulk updates

The Report users tags used for a more efficient user administration is now also available in the following four user administration pages used for bulk edits:

- Tabs vs users
- Filters vs users
- Variable subset vs users
- H-filter vs users

Below we see an example where the users are tagged with their country belonging which makes it quicker to find and edit a group of users belonging to a specific country.


Tabs Vs Report users
Save
Select Report
StoryCreator
Following Report users do have Access rights to the selected Report Level
USERNAME
TAGS
Diaz Joe
US
Hudson Pete
US
Hultman Glenn
Sweden
Karlsson Olle
Sweden
Kelly Marianna
US
Palm Olof
Sweden
Parker allan
US

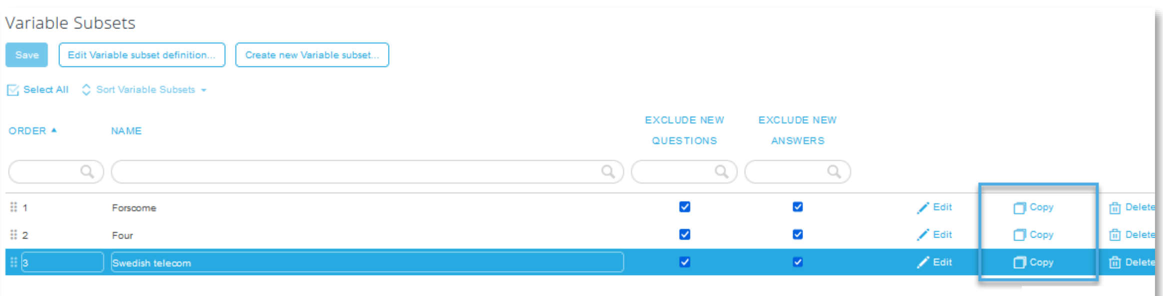
8 Project administration

8.1 Copy Variable subset

Variable subsets can now be copied for a more efficient process.

You copy a Variable subset from the grid displaying all the existing variable subsets as shown in first image below or by entering an existing subset and use the “Save as” option as shown in second image below

New copy option



New Save as option