Dapresy Pro 2017 Winter Release

Index

1 - Introduction

This document describes new and improved features in Dapresy Pro 2017 Winter 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

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2 - Overview

Dapresy Pro version 10.2 has improved many features including a brand new document archive module, improved report user management, multi-language support, and more.

Below is a list of all the new features that will improve your Dapresy Pro experience. Each of these features are described in further detail throughout this document.

Report User Management Improvements

- New interfaces for creating and editing users
- New ability to set default language for each user
- New ability to set default report for each user
- New access right setting for hierarchical filters, “Access to child nodes”
- New ability to add/edit access to Events in the report user pages
- Improved Excel process for bulk edits. All existing users can now be downloaded into an Excel file for editing outside Dapresy Pro, and then loaded back in
- New ability to set access rights to Variable subsets in the Excel process
- New ability to set access rights to Events in the Excel process
- A new report user management module has been added that gives selected report users the ability to create and maintain other report users

Document Archive 2.0 - A New Module

A new Document archive module has been added to Dapresy Pro. It has the following benefits:

- A more modern look and feel
- A more user-friendly setup and document upload process
- Supports bulk upload of files connected to different Hierarchical filters nodes
- A folder structure is supported within the archive
- Supports search among documents (by name and description, not by content)
- Supports upload of documents by both the administrators and the report users

Storyteller Improvements

Setup improvements:

- A new toolbar for managing size and position of objects
- New double click logic for entering the edit mode of an object

- New support for turning on/off the object boarders during setup

Chart improvements

- New automated logic to show light/dark data label based on background color for better label visibility (a new setting in stacked bars/columns and in pie and donut charts)
- The defined units in a chart are now shown in the tooltip
- New option for inverting background color in chart and table setup window – this is useful when using white text

Icon and shape improvements

- A Polygon shape has been added to the Icon and shape library

Text box improvements

- The "No selection" text can now be removed from the Dynamic text to reduce unnecessary information
- New support allows you to keep filter selections when navigating between reports

New Cross Table Tool Improvements

- Number-of-cells-to-calculate indicator has been added for better usability

Administration Improvements

- New support for basic data recoding
- Improved performance in data activation and in derive hierarchical filter from data screen
- An improved and more efficient process for updating the hierarchical filter structure, it is now possible to keep access rights, report settings etc. when a node is moved

3 - Report User Management Improvements

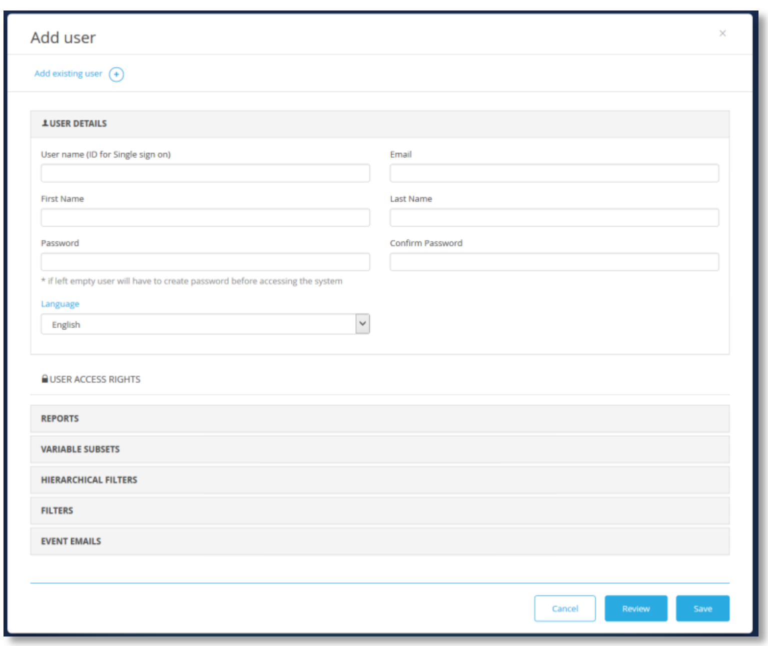
The following improvements have been made in the report user management area, each of these are described in detail further down.

- New interfaces for creating and editing users
- New ability to set default language for each user
- New ability to set default report for each user
- New access right setting for hierarchical filters, “Access to child nodes”
- New ability to add/edit access to events in the report user pages
- Improved Excel process for bulk edits. Now all existing users can now be downloaded into an Excel file for editing outside Dapresy Pro, and then loaded back in
- New ability to set access rights to variable subsets in the Excel process
- New ability to set access rights to events in the Excel process
- A new report user management module has been added which gives select Report users the ability to create and maintain other report users

3.1 Updated Design of Create/Edit Report User Page

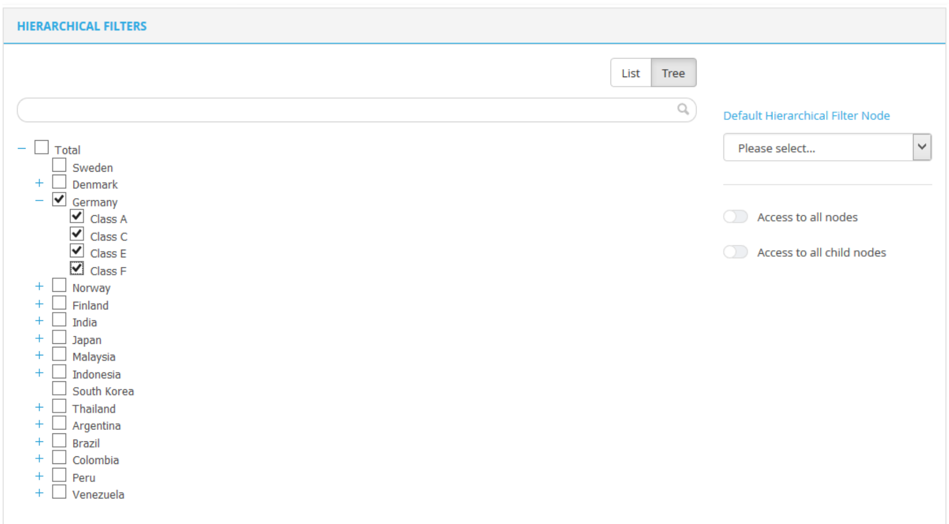
The layout of the Create and Edit Report user page has been redesigned. The page has been divided into different subpanels for better usability.

The image below shows the new design of the create and edit report user pages.



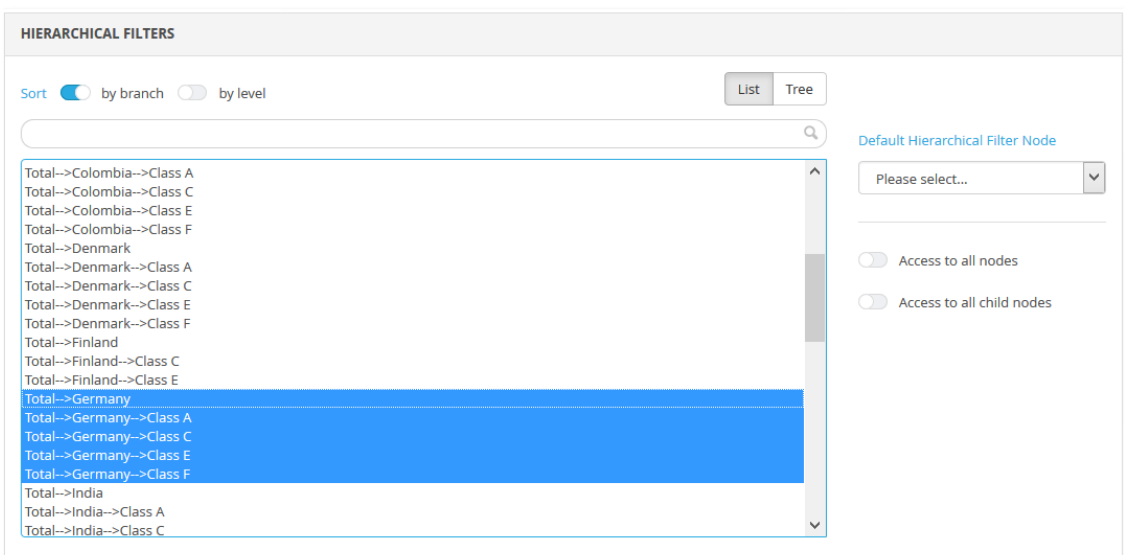
In the Hierarchical Filter panel, a tree view is used by default (see image below). It is the most effective way of finding and selecting the desired nodes.

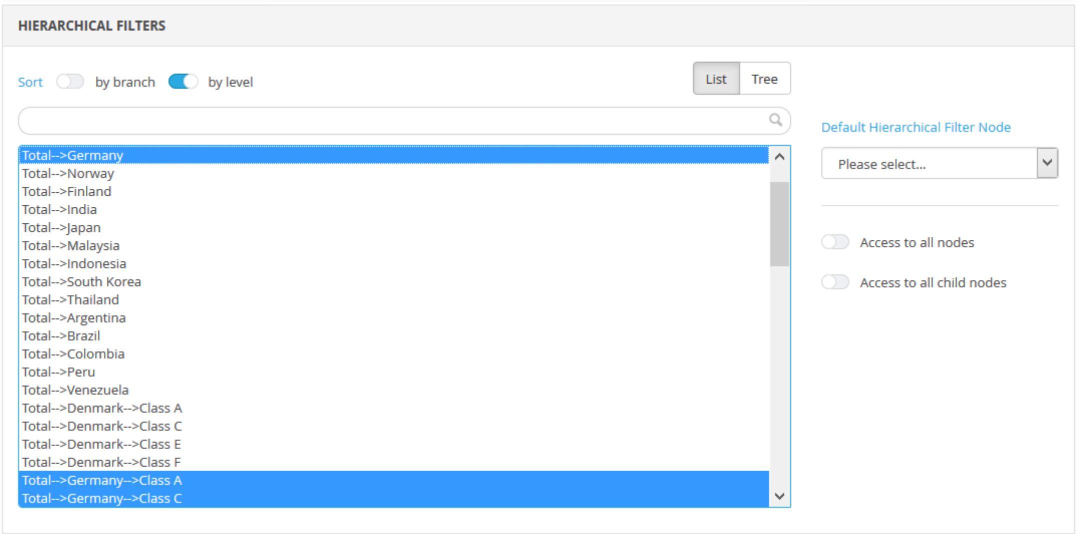
The image below shows the tree view used to set access to hierarchical filter nodes.



The hierarchical filters can also be shown in a list view, as shown in the image below. If you use the list view, the sorting can be based on either branch or levels, see example images below.

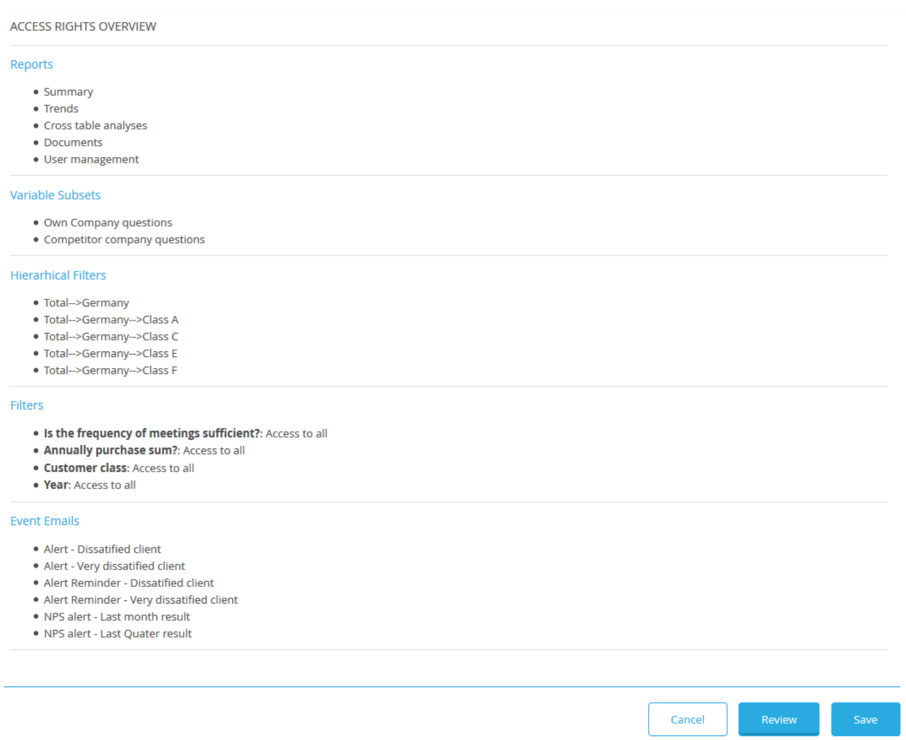
The images below show the list view for setting access to hierarchical filter nodes. The sorting in the first image is based on "by branch" and the sorting in the second image by "level".





In the bottom of the create/edit report user page, you'll find a 'Review' function. Use this option to get an overview of the access rights of each user, all within one view.

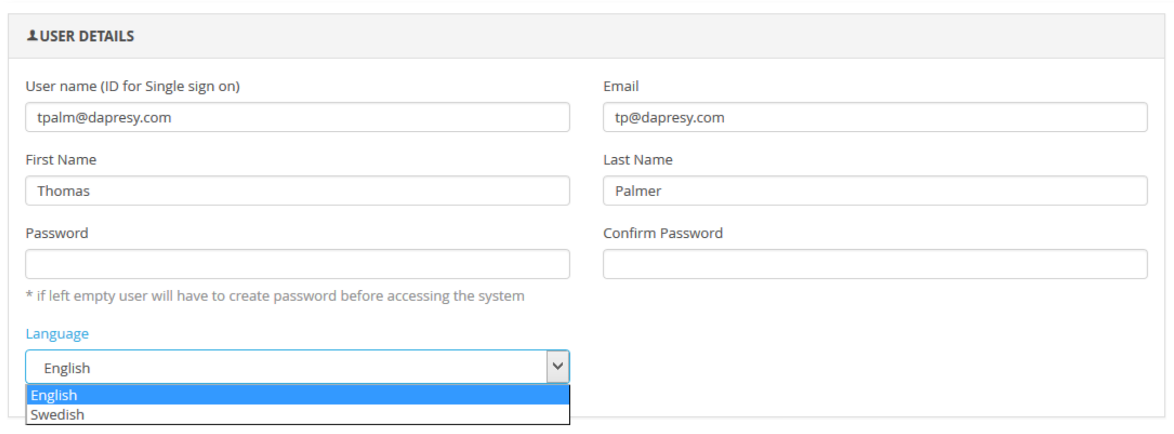
The image below shows the 'Review' function. The Review button is located in the bottom right corner, as shown in the image below.



3.2 Default Language per User

In projects that have multiple languages, you can now set the default language for each user. The option is available in the create/edit report user page (as shown in the image below), but also in the Excel bulk edit process (see chapter 3.6).

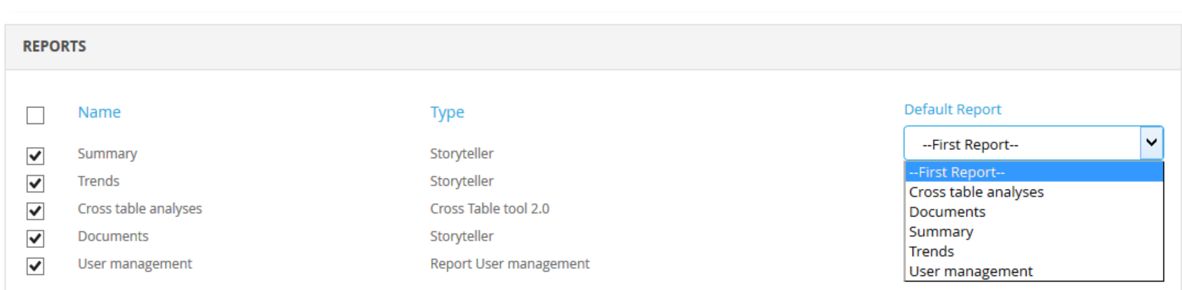
The image below shows how you can set the default language per user. The option will only appear if the project consists of more than one language.



3.3 Default Report per User

Previously, a user would always enter the "first" report once they logged in. Now, you can set the default report depending on which user logs in. You can select from all reports (and sub-reports) that the user has access to. The default option is the "first report." This option is available in the create/edit report user page (as shown below), and is also available in the Excel bulk edit process (see chapter 3.6).

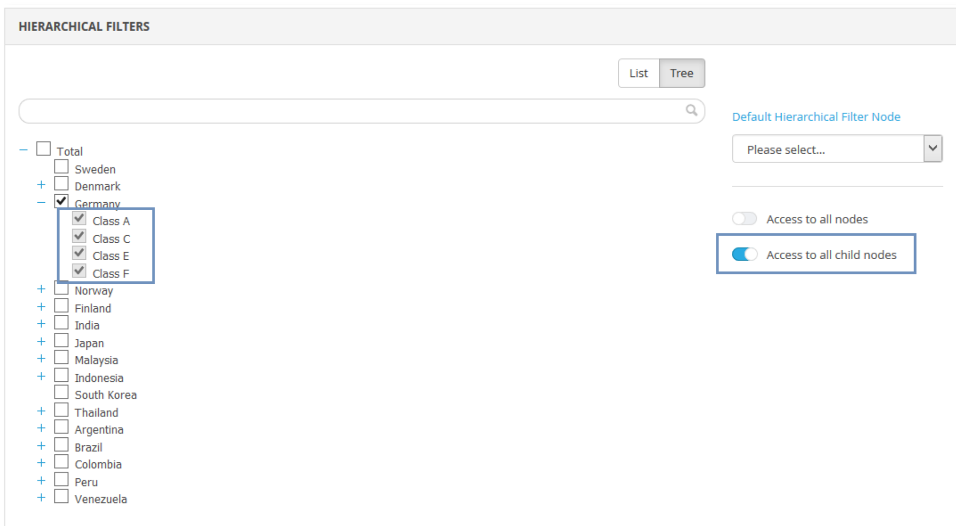
The image below shows how to set the default report per user.



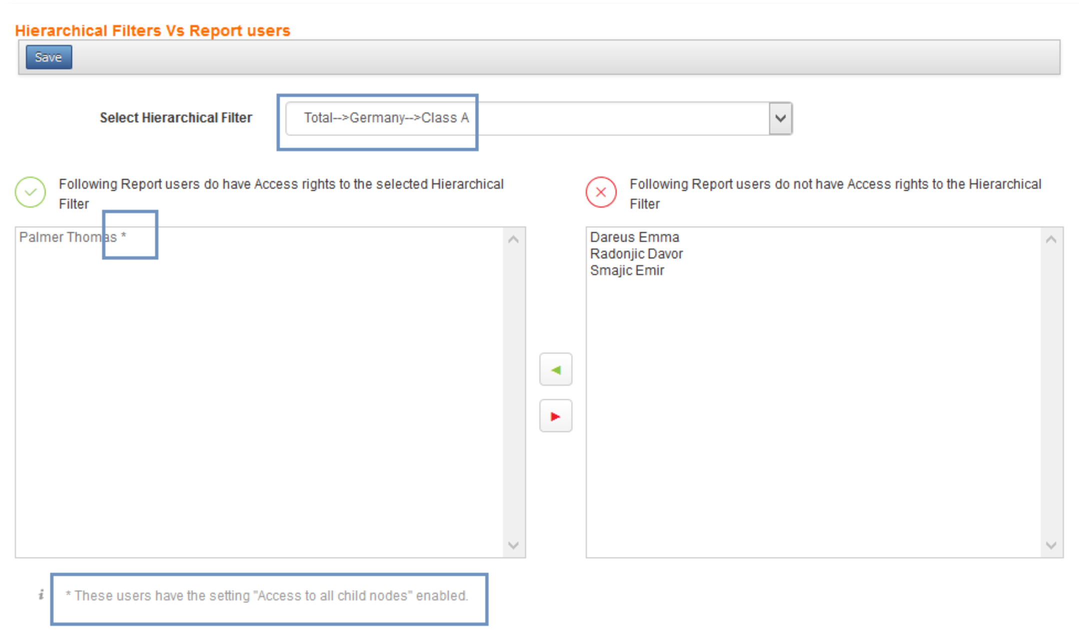
3.4 New H-Filter Access Setting: Access to All Child Nodes

A new access right setting has been added to hierarchical filters to make user management more efficient, specifically when new nodes are added later in ongoing projects. This new setting is called "Access to all child nodes." It gives the user access to all child nodes of the selected node; this also includes child nodes added in the future.

In the image below, you'll see the new setting. Germany and "Access to child nodes" were selected, this means that the user automatically gets access to all nodes that are below Germany (including future added nodes).



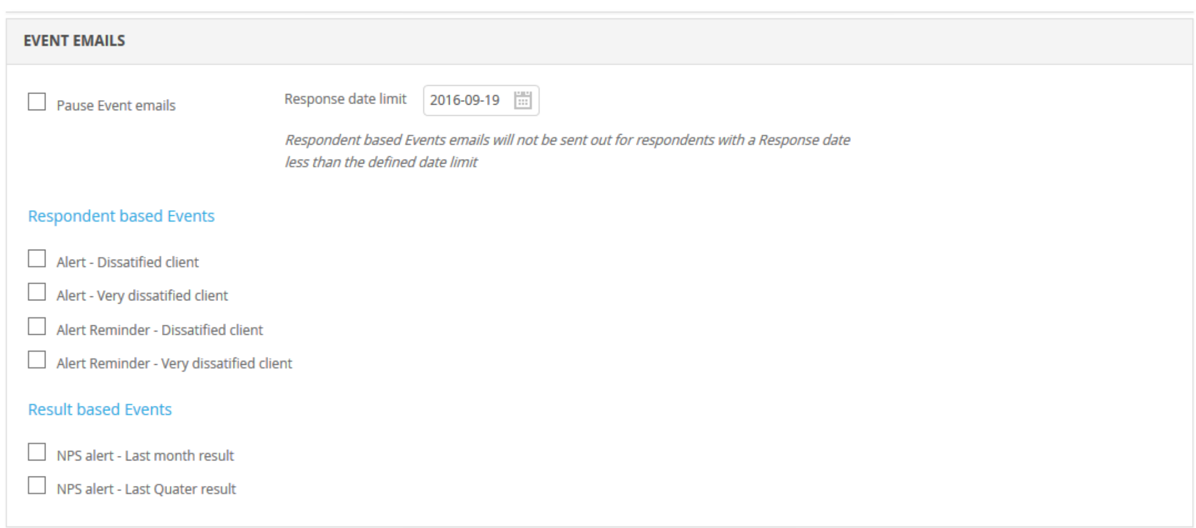
Note: If a user has the setting "Access to child nodes" activated, then the user is denoted with an asterisk (*) in the page "Hierarchical Filters Vs Report users" since the access rights of the child nodes cannot be edited. In the example in the image below, the user "Thomas Palmer" has access to Germany and he has "Access to child nodes." When any of the child nodes to Germany are selected, for example "Class A," then the user will be deactivated in the list since the access rights cannot be updated when any of the child nodes to Germany are selected.



3.5 Event Updates in Create/Edit Report User Page

Previously, a report user could only be added to an Event by entering the Event itself. Now, you can also give access to Events in the create/edit report user page. This simplifies the user management experience since all user settings can be made in the same place.

In the image below, you see the new Event settings that will appear if the project contains Events.

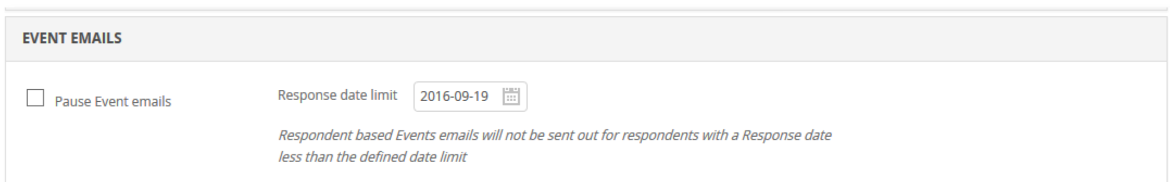


3.5.1 Pause Events & Filter by Date

To avoid sending out Event emails when a person is away a new "Pause Event emails" option has been added. When this option is selected, the user will not get any Event emails. Once the Pause option has been turned off, the user will get all the "missed" Event emails when the Events are triggered the next time. See image of the new setting further down.

Also, you can now limit the Event by date to avoid sending out old event emails when a user is added in an ongoing project or when updating a portal with historical data, etc. If the "response date limit" is set to 2016-09-19, like in the image below, no event emails will be sent out to this user for respondents with a lower response date even if they fulfill the trigger criteria. "Today's" date is the default date when a new user is created.

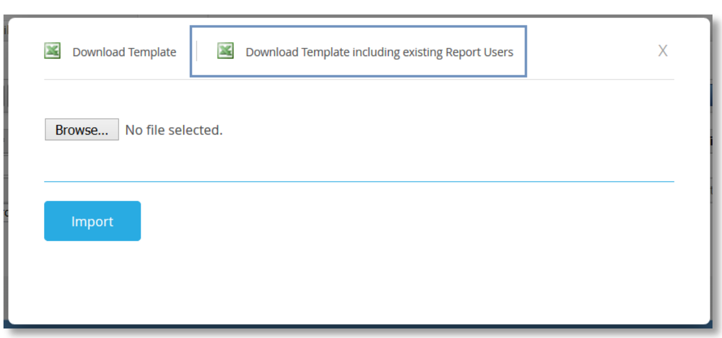
The image below shows the new Pause and Response date limit options.



3.6 Updated Excel Bulk Creation/Edit Processes

The Excel process now supports a bulk edit process that is much more efficient. Existing users can be downloaded into an Excel template where they can be edited and then loaded back into the system.

To download the Excel template that includes the existing users, simply use the option highlighted in the image below, 'Download Template including existing Report Users.'



The Excel template process has been improved to support all items that the user can get access rights to. The following options are new in the Excel process for creating/editing users:

- Default language
- Default report
- Access to Variable subsets
- Access to Events

The template layout has also been updated to make it more user-friendly. As shown in the image below, all the columns have been grouped into different areas, making it is easier to enter the user data.

The image below shows the new layout of the Excel template.

C	D	E	F	G	H	I	J	K	L	M	N
User details				Hierarchical Filters			Reports				
Last name	Email address	Password	Default language	H-Filter Code	Access rights	Code of default H-Filter Unit	5 - Summary	6 - Trends	7 - Cross table analyses	8 - Documents	9 - User management
Palmer	tp@dapresy.com		1 - English	HFilter3	Access to all child nodes		Access	Access	Access	Access	Access
Dareus	ed@dapresy.com		1 - English	HFilter2	Present node		Access	Access	Access	Access	Access
Smajo	es@dapresy.com		1 - English	HFilter1	Present node		Access	Access	No Access	No Access	No Access
Smajo	es@dapresy.com		1 - English	HFilter2	Present node		Access	Access	No Access	No Access	No Access

In hierarchical filter projects, you can now find the H-Filter codes in the second sheet. This makes it easier to find the codes that are needed when giving access to H-Filters in the first sheet.

The image below shows the second sheet with the H-Filter codes.

	A	B	C
1	Path	Name	Code
2	Total	Total	HTotal
3	Total-->Argentina	Argentina	HFilter13
4	Total-->Argentina-->Class A	Class A	HFilter13Customerclass1
5	Total-->Argentina-->Class C	Class C	HFilter13Customerclass3
6	Total-->Argentina-->Class D	Class D	HFilter13Customerclass4
7	Total-->Argentina-->Class E	Class E	HFilter13Customerclass5
8	Total-->Argentina-->Class F	Class F	HFilter13Customerclass6
9	Total-->Brazil	Brazil	HFilter14
10	Total-->Brazil-->Class A	Class A	HFilter14Customerclass1
11	Total-->Brazil-->Class C	Class C	HFilter14Customerclass3
12	Total-->Brazil-->Class D	Class D	HFilter14Customerclass4
13	Total-->Brazil-->Class E	Class E	HFilter14Customerclass5
14	Total-->Brazil-->Class F	Class F	HFilter14Customerclass6
15	Total-->Colombia	Colombia	HFilter15
16	Total-->Colombia-->Class A	Class A	HFilter15Customerclass1
17	Total-->Colombia-->Class C	Class C	HFilter15Customerclass3
18	Total-->Colombia-->Class E	Class E	HFilter15Customerclass5
19	Total-->Colombia-->Class F	Class F	HFilter15Customerclass6
20	Total-->Denmark	Denmark	HFilter2
21	Total-->Denmark-->Class A	Class A	HFilter2Customerclass1
22	Total-->Denmark-->Class C	Class C	HFilter2Customerclass3

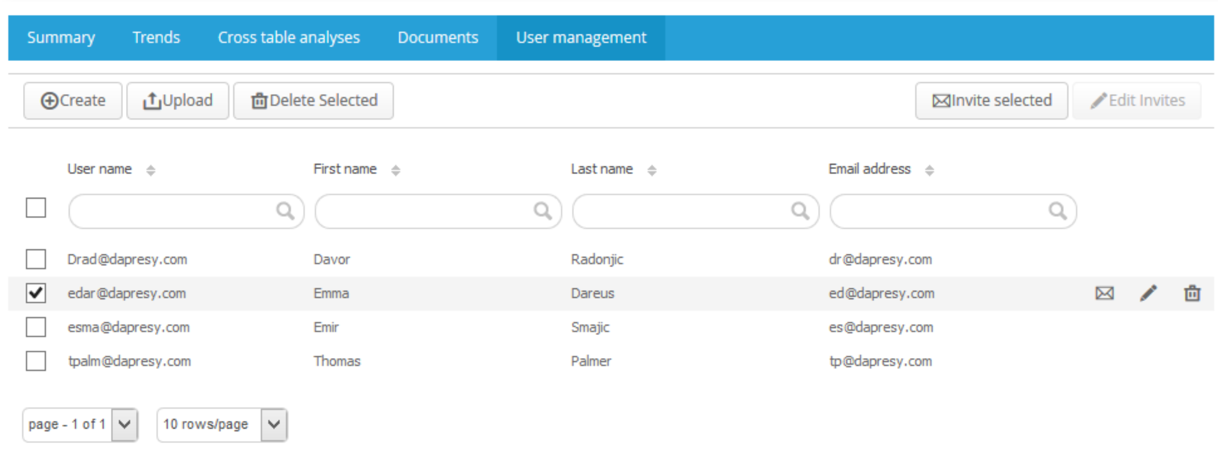
template | H-Filter codes

Note: The old Excel template format can still be used if you have your users in it already but preferably you download the new template, including the users, so the more user-friendly format is used instead.

3.7 Report User Management Module

A new module (a new Portal tab type) has been added that allows report users to manage access rights of other report users in the project. This module is incorporated in the portal like all other modules.

The image below shows an example of the new report user management module.



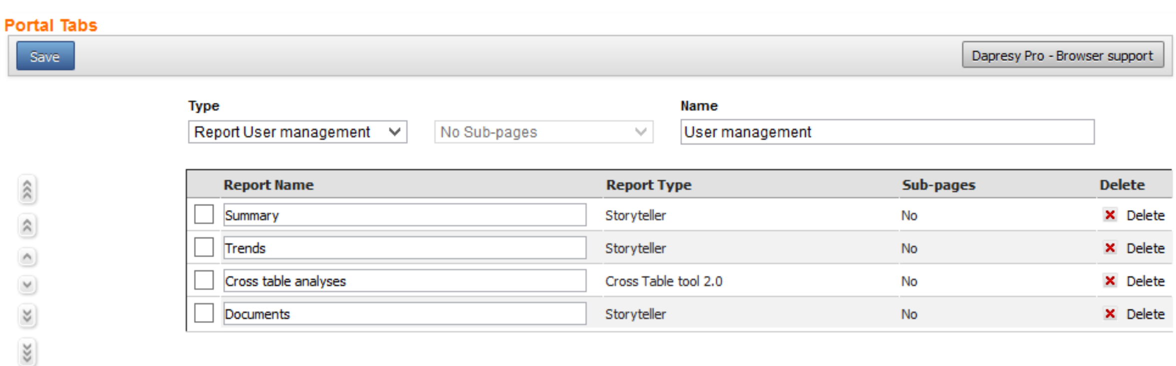
Note: A report user that is allowed to manage the access rights of other users can only give access rights to the same (or less) items that he/she has access rights to, such as filters, hierarchical filters, portal tabs, events and variable subsets. They will also never be able to view users with higher access rights.

To give a report user the ability to manage the access rights of other users, the new module named "Report user management" needs to be added to the portal. The report user who will be managing the access rights must get access to it.

3.7.1 Adding the Report User Management Module

To add the report user management module, simply add it to the portal in the 'Portal Tabs' page. From there, you can decide the name and position, just like adding any other type of tab to the portal.

The image below shows the new report user management module in the Portal Tab page.

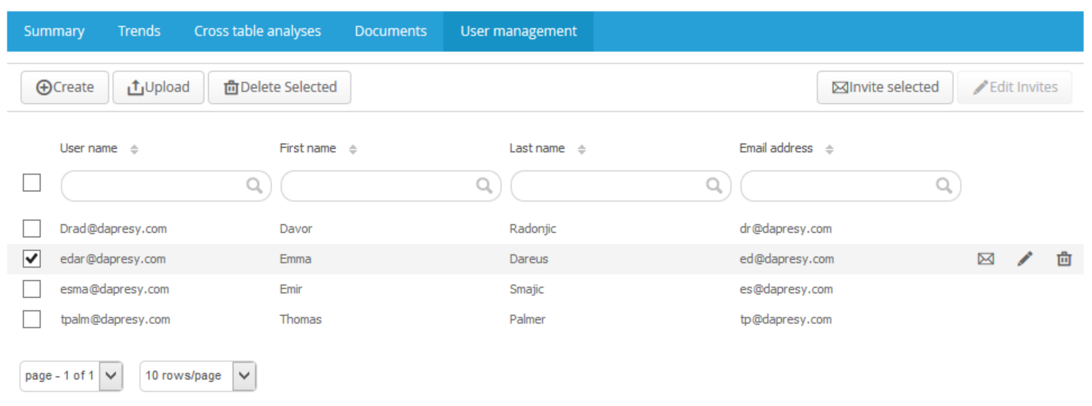


As always, the access right to this module is set in the create/edit report user page.

3.7.2 Using the Report User Management Module

The report user management module works just like the existing administration pages used to create/edit report users. The image below shows what the report user management module looks like from a user perspective.

The image below shows the report user management module in a portal.



Note 1: When an administrator is working in the new module, they see all users. When a report user is working in the new module, they will only see the users with the same (or less) access to filters, portal tabs, events etc.

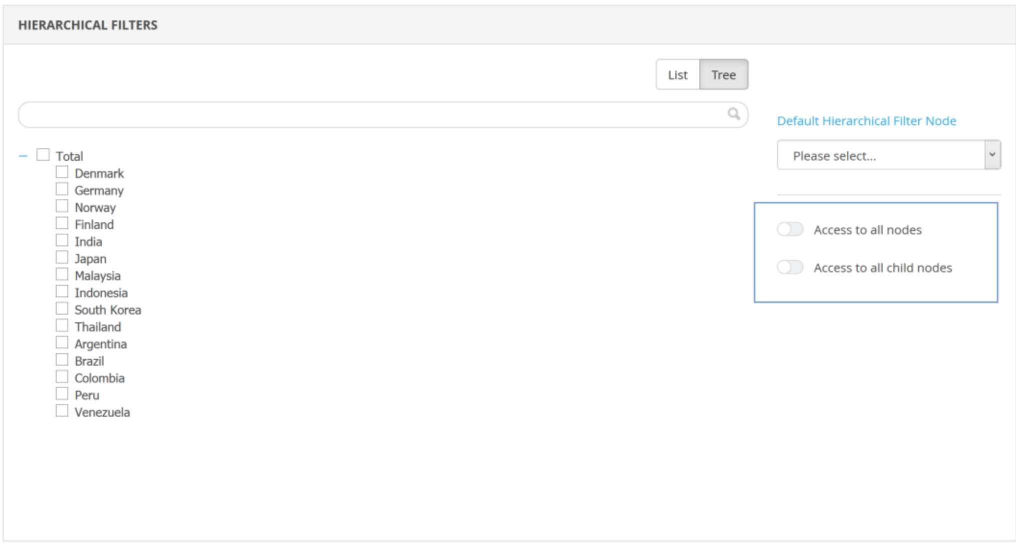
Note 2: When an administrator is working in the new module, they can add new users that exist in other projects (the same logic as existing administration pages). However, when a Report user is working in the new module, they cannot add users that exist in other projects. It is only possible to add new users or edit the existing users.

Note 3: When an administrator is working in the new module, they can save and schedule invites exactly as they currently do in the administration pages. When a report user is creating an invite, they cannot schedule to send it out at a later time or save it for future usage. An invite can only be sent out at that time.

Note 4: When a report user manages the access rights of other report users, then the following logic is applied to the hierarchical filter options:

- **Access to all nodes:** A Report user can only give other report users access to “Access to all nodes” if he/she has “Access to all nodes” enabled. If not, then the option is hidden so it cannot be used.
- **Access to all child nodes:** A report user can only give other report users access to “Access to all child nodes” if he/she has “Access to all nodes” or “Access to all child nodes” enabled. If not, then the option is hidden so it cannot be used.

The image below highlights the options "Access to all nodes" and "Access to all child nodes." These are not shown for all report users that can manage the access rights, as they are access right dependent.



3.8 Removed User Administration Pages

Previously, report user access rights could be managed in the create/edit report user page as well as the following pages:

- Tabs Vs Users
- Users Vs Tabs
- H-Filters Vs Users
- Users Vs H-Filters
- Filters Vs Users
- User Vs Filters
- Variable subsets Vs Users
- Users Vs Variable subsets

To streamline the process and avoid duplicate functionality in multiple places, the below pages no longer allow report user access right management:

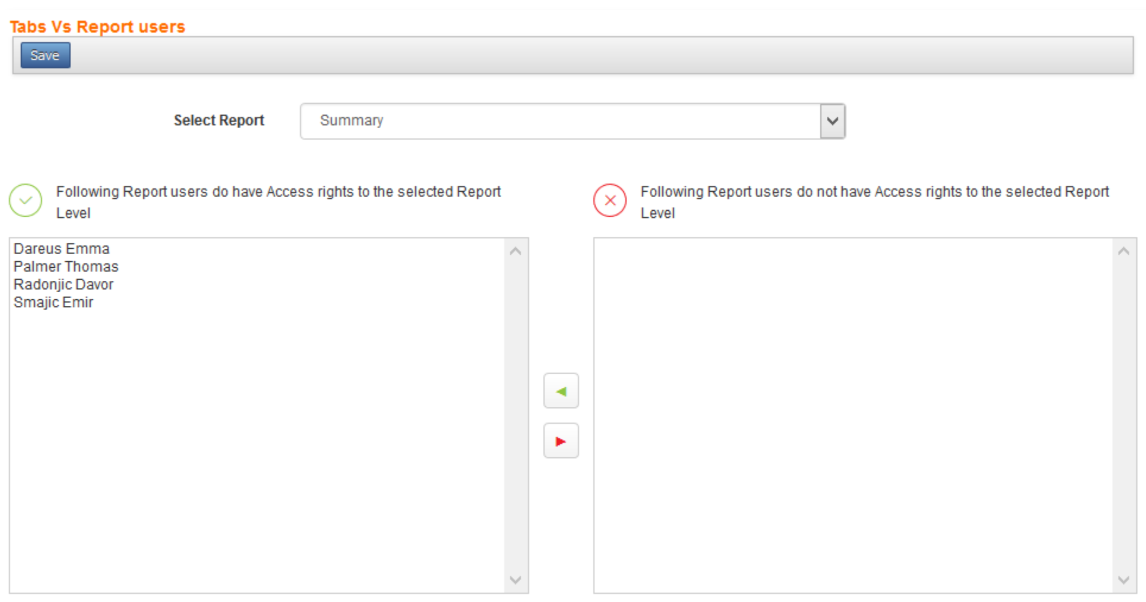
- Users Vs Tabs
- Users Vs H-Filters

- User Vs Filters
- Users Vs Variable subsets

The following pages, which are used for bulk edits, are still present:

- Tabs Vs Users
- H-Filters Vs Users
- Filters Vs Users
- Variable subsets Vs Users

The image below shows the Tabs Vs Users. The design has been updated, but the functionality remains the same.

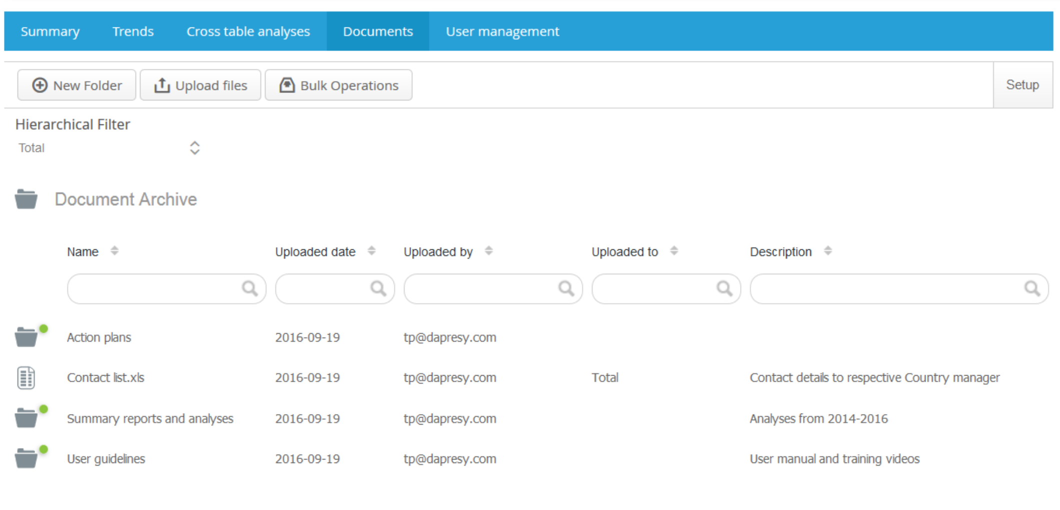


4 - Document Archive 2.0 - A New Module

A new document archive module has been added to Dapresy Pro. This new module has the following benefits compared to the older one:

- A more modern look and feel
- A more user-friendly setup and document upload process
- Supports bulk uploads of documents connected to different H-Filter nodes
- Supports a folder structure within the Document archive
- Supports search among documents (by name and description, not by content)
- Supports upload of documents by both the administrators and the report users

The image below shows an example of the new document archive module. The green icon indicates that the folder is distributed, which means that report users can view it.



4.1 Setting up a Document Archive 2.0

The new document archive module is simply added to the portal in the 'Portal Tab' page, similar to how other portal tabs are added.

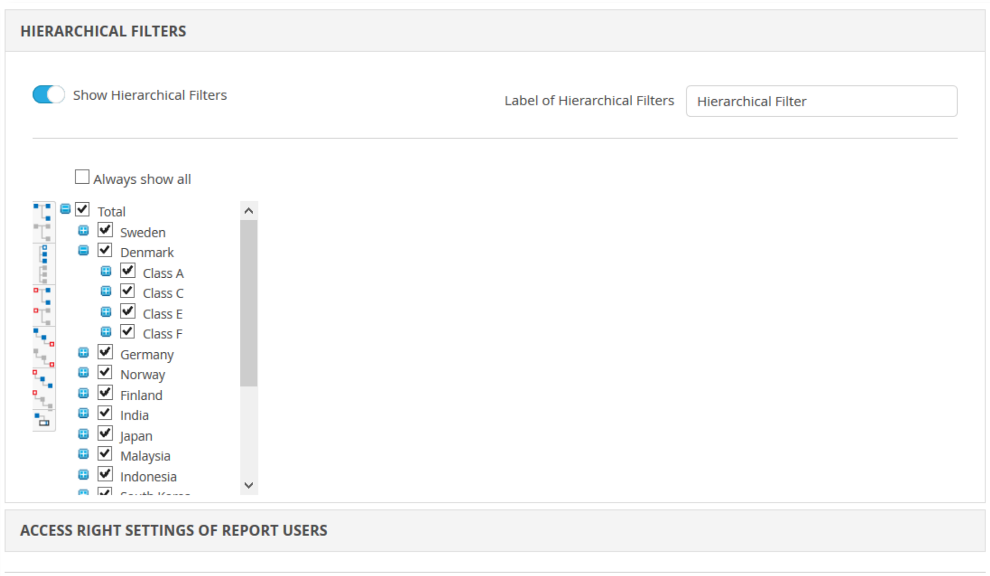
Once you have added the Document Archive to the portal, you can edit the following settings:

- Choose which H-Filter nodes you would like to show in the Document Archive
- Choose if report users will be able to download, upload, edit and delete files, or only have the ability to download files

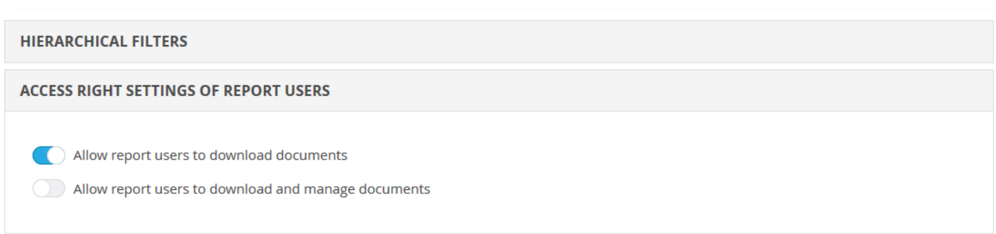
You can edit these two settings in the 'Setup' window within the Document archive (see image below).

Click the highlighted option below to enter the Setup window.

The image below shows the setup of H-Filters. The setup works similar to the Storyteller and the Cross Table Tool 2.0. You simply select which nodes that shall be available. The Hierarchical Filter label can also be updated, if needed.



The image below shows the setup of access right settings of report users.



4.2 Folder Administration

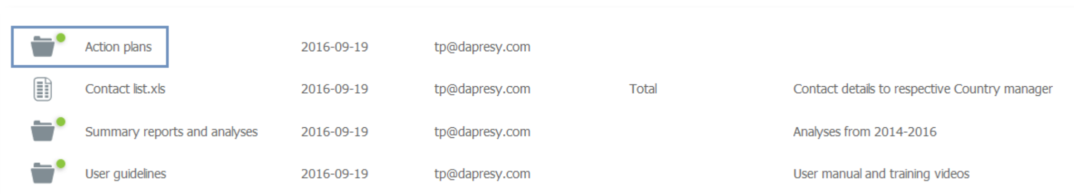
Folder administration can only be made by the administrator, not by report users.

Note: If the project contains hierarchical filters, it's important to understand that each Document Archive has one folder structure, and not one per hierarchical filter. Hierarchical filters are only used to filter documents, not to filter folders.

4.2.1 Navigate between Folders

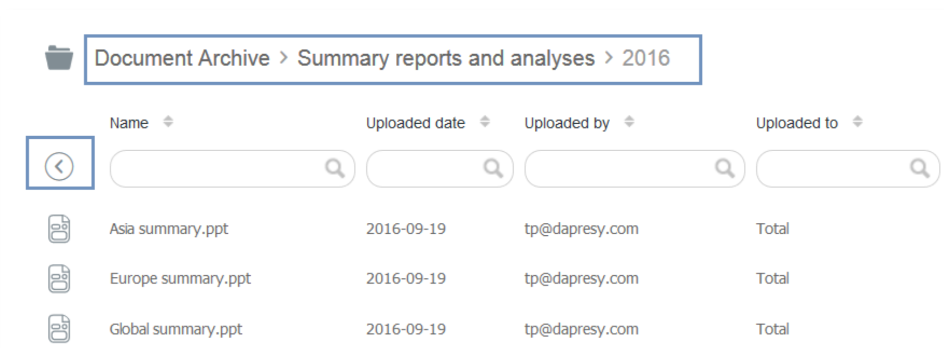
To enter a folder, simply click on the folder icon or the folder name.

The image below shows where you can click to enter a folder.



To navigate up in the folder structure, either use the "back" arrow or the folder path link to go to a specific folder.

The image below highlights the options to navigate back in the folder structure.

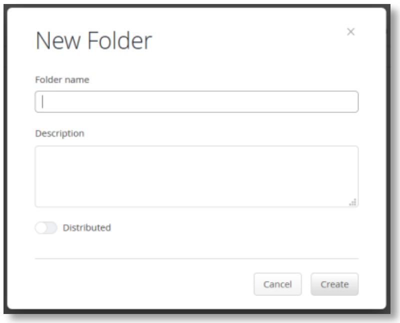


4.2.2 Create a Folder

To create a new folder, simply click the "New Folder" button in top left corner and a new window will appear (as shown below). You will be required to name the folder, but the description is optional.

Report users can only see distributed folders. By default, all folders are set to undistributed.

The image below shows the New Folder window.



Note: The folder names have to be unique, so two folders within same parent folder cannot have the same name.

4.2.3 Edit a Folder

To edit a folder, click the edit button shown in the image below. In the edit window, you can update the name, description and distributed status.

The image below shows the 'Edit' folder option.

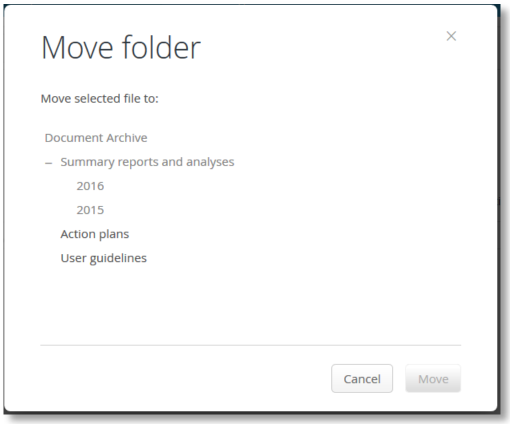
Note: The distribute status can also be changed in the menu, as shown in the image below.

The image below shows the Distribute option.

4.2.4 Move a Folder

To move a folder into another folder, click "Move," as shown in the image below. Once in the 'Move' window, you'll see the current folder structure is shown in a tree. To move the folder, choose the folder you want, and click the 'Move' button.

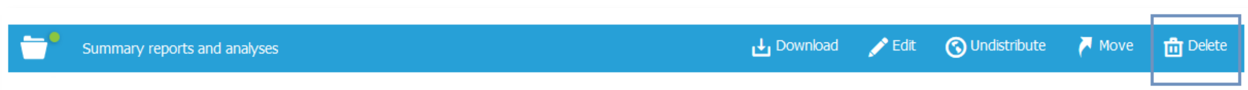
The images below show how to move a folder.



4.2.5 Delete a Folder

To delete a folder, simply click the ‘Delete’ button shown in the image below.

The image below shows how to delete a folder..



Note: When a folder is deleted, all the documents and sub-folders will be deleted as well. A deleted folder/file cannot be brought back.

4.2.6 Download a Folder

Only administrators have the ability to download a folder (including sub folders and documents). To download a folder, click the ‘Download’ option, as shown in the image below.

The image below shows how to download a folder.

Note: Only administrators can download folders. Report users cannot.

4.3 File Administration via User Interface

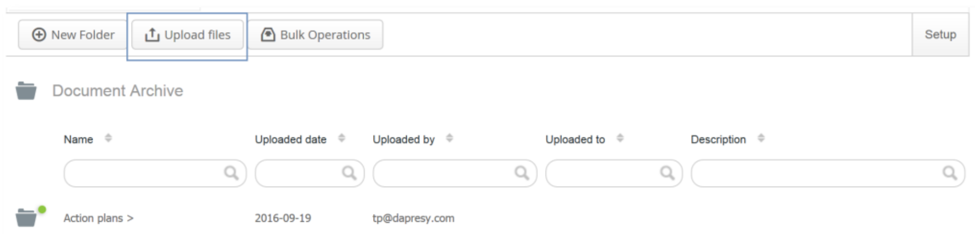
Files can either be uploaded via the regular upload interface or via a bulk upload interface. This chapter describes the regular upload interface. The bulk processes are described in chapter 4.4.

Note: The total storage space of the document archives within a project is limited to 200 MB. If more storage is needed, please contact your account manager for further information.

4.3.1 Upload a File

To upload a file, click the ‘Upload Files’ option in top left corner of the page to open the upload window.

The image below highlights the button to click to open the Upload window.



Non-Hierarchical Filter Projects

Follow these 5 easy steps to upload a **non-**hierarchical filter project:

- Step 1: Go to the folder that the file will be uploaded to
- Step 2: Enter the ‘Upload’ window
- Step 3: Click ‘Add files’ to choose the fil you would like to upload (you can select one or more files at the same time)
- Step 4: Write a description for the file (this is optional)
- Step 5: Click ‘Start upload’ to upload the files. An icon will appear for each file after it has been successfully uploaded.

If more files need to be uploaded, you don’t need to close and re-open the upload window; just repeat the steps above to upload more files.

Note: The file name (including the file extension) must be unique within a folder. If you try to upload a file with the same name (including the file extension) as an existing file in the same folder, then you will have to either cancel the upload or replace the existing file.

The image below shows the ‘Upload files’ window in a non-hierarchical filter project.

Hierarchical Filter Projects

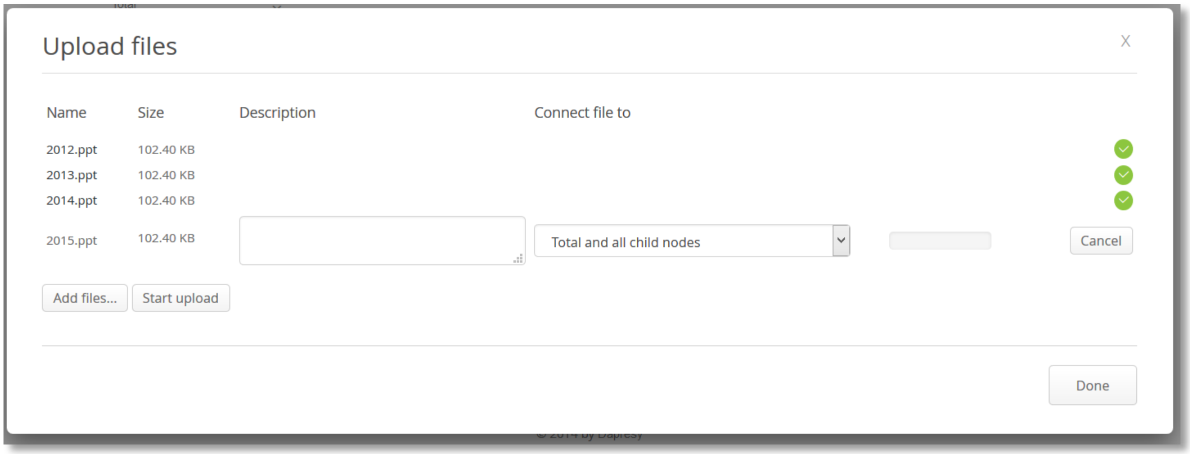
Follow these 7 easy steps to upload a hierarchical filter project:

- Step 1: Go to the folder that the file will be uploaded to
- Step 2: Select the hierarchical filer node that the file will be connected to
- Step 3: Enter the 'Upload' window
- Step 4: Click 'Add files' to choose the fil you would like to upload (you can select one or more files at the same time)
- Step 5: Write a description for the file (this is optional)
- Step 6: Choose if the file will only be shown when the selected node is shown, or if it will also be shown when the child nodes are selected
- Step 7: Click 'Start upload' to upload the files. An icon will appear for each file after it has been successfully uploaded.

If more files need to be uploaded, you don't need to close and re-open the upload window; just repeat the steps above to upload more files.

Note: The file name (including the file extension) must be unique within a folder and hierarchical filter node. If you try to upload a file with the same name (including the file extension) as an existing file connected to the same hierarchical filter node and in the same folder, then you will have to either cancel the upload or replace the existing file.

The image below shows the 'Upload files' window in a hierarchical filter project.



4.3.2 Edit a File

You can edit the file name, description and hierarchical filer connection by clicking the 'Edit' option, as shown in the image below.

The image below shows how you can edit a file.

4.3.3 Move a File

You can move a file into another folder by using the 'Move' option, as shown in the image below.

The image below shows how you can move a file.

<u>Note:</u> When a file is moved into a folder that contains a file with same name, extension and H-Filter connection, then you need to either need to replace the file or cancel the move.

4.3.4 Delete a File

To delete a file, simply click the 'Delete' option, as shown in the image below.

The image below shows how to delete a file.

Note: You can delete multiple files at the same time by using the bulk process. See further details in chapter 4.4:

4.3.5 Download and Preview a File

You can download a file by either clicking the file name or by clicking the 'Download' option, as seen in the image below.

The image below shows how you can download a file. Click on either the file name or the 'Download' option.

Note: You can preview an **image** file before downloading it. To preview a file, click the file icon or the 'Preview' button.

The image below shows how you can preview a file. Either click on the file name or the 'Preview' option.

4.3.6 Search for Files

If you are looking for a specific file, then use the search function at the top of the document list. This will search the selected folder and all the subfolders.

Note: When a report user searches for files, the system will only search distributed folders. When an administrator searches for files, the system will search through all folders.

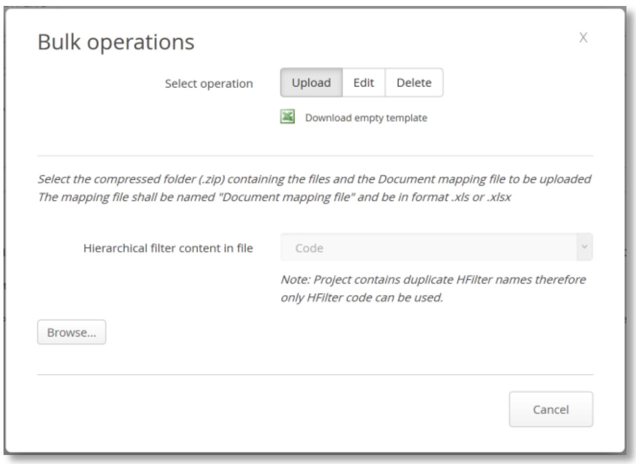
4.4 Bulk Upload, Edit and Delete Processes

Administrator users (not report users) have the ability to bulk upload, bulk delete and bulk edit files in a Document Archive.

To enter the Bulk Operations window, click the button 'Bulk Operations' in the top left corner of the Document Archive.

The image below shows how to enter the 'Bulk Operations' window.

The image below shows the 'Bulk Operations' window.



4.4.1 Bulk Uploading Files

When bulk uploading files, all the files that will be uploaded are placed in a zipped folder with an Excel file. The Excel file contains the following information:

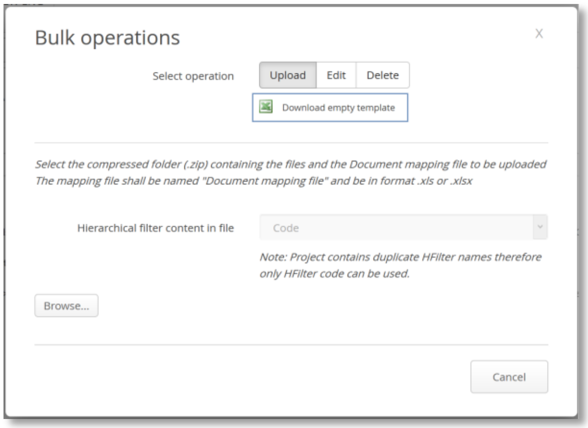
- Which folder each file shall be stored in
- The description text of each file
- Which hierarchical filter node each file will be connected to

The following chapters will further describe how to bulk upload files.

4.4.1.1 How to Prepare the Document Mapping File

The Excel file that is used to map the documents to the folders and hierarchical filters must be named "Document mapping file" and have a certain structure. You can download an empty template file by clicking the highlighted option 'Download empty template,' as seen in the image below.

Click the option 'Download empty template' to download the template file.



The template file consists of the following columns:

- Original file name
- New file name
- File description
- Hierarchical filter (only available if hierarchical filters are used)
- Connect to (only available if hierarchical filters are used)
- Folder path

The following columns are described in further detail below:

Original File Name: Enter the file name including the file extension

New File Name: If you would like to display a different file name than the original name, then you can enter the new name in this column. If you do not need a new file name, then leave this column blank.

File Description: Enter the file description - this is optional.

Hierarchical filter: Enter the code or name of the of the hierarchical filter node to connect the file to.

Note 1: During the upload process, you can select if the names or the codes have been used in the Excel file. However, if there are duplicate hierarchical filter names in the Document Library, then you can only select the codes and not the names.

Note 2: To find out what the hierarchical filter codes and names are, just check the second sheet of the downloaded template file.

Connect To: Select if the file should only be connected to the selected node or to the child nodes as well.

Folder Path: Select which folder the file will be stored in (the cells in the Folder Path column have a dropdown list that shows the folder structure).

4.4.1.2 Uploading the Zipped Folder

To upload the zipped folder, simply follow these 5 steps:

- **Step 1:** Open the Bulk Operations window
- **Step 2:** Make sure you have selected the 'Upload' option
- **Step 3:** If the project contains hierarchical filters, then select if the code or the names have been used in the document mapping file
- **Step 4:** Browse for the zipped folder. Make sure that the document mapping file is in the folder
- **Step 5:** Start the upload

4.4.2 Bulk Editing Files

In the bulk edit process, all the files in the Document Archive can be edited via an Excel download/upload process. You can update the following settings using the bulk edit process:

- The name of the file
- The description text
- The hierarchical filter connections
- The folder path

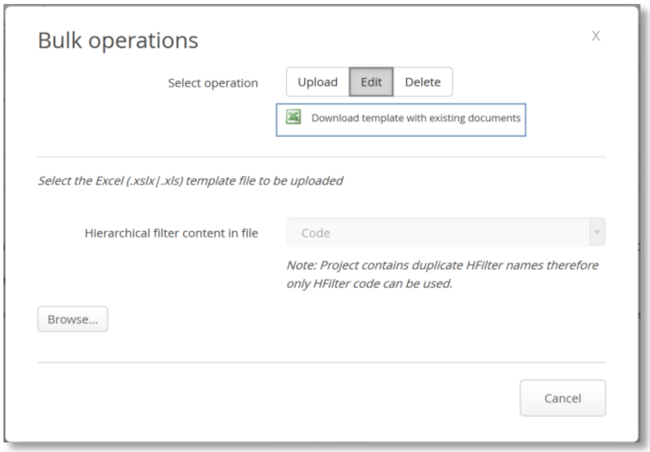
Follow these 4 steps to bulk edit files:

- **Step 1:** Download the Excel file that contains data on all existing files
- **Step 2:** Make your changes to the Excel file
- **Step 3:** Upload the Excel file
- **Step 4:** All files within this Excel file will be updated with the new info

4.4.2.1 Prepare the Excel File

You can download the Excel file with information about all the existing files by clicking the option highlighted in the image below.

The image below shows the button you can click to download the Excel file.



Any changes that need to be made can be made in the Excel file. During the upload process, only the present files in the Excel file are processed. So if you don't want to update a file, then don't change any information in the Excel file or delete the row.

4.4.2.2 Upload the Excel File

To upload the Excel file, follow these 5 steps:

- **Step 1:** Open the Bulk operations window.
- **Step 2:** Select the 'Edit' option from the dropdown list
- **Step 3:** If the project contains hierarchical filters, then select if the code or the names have been used in the Excel file
- **Step 4:** Browse for the Excel file (the name of the file does not matter)
- **Step 5:** Start the upload

4.4.3 Bulk Delete Files

In the bulk delete process, all the files within in the Document archive can be deleted via an Excel download/upload process.

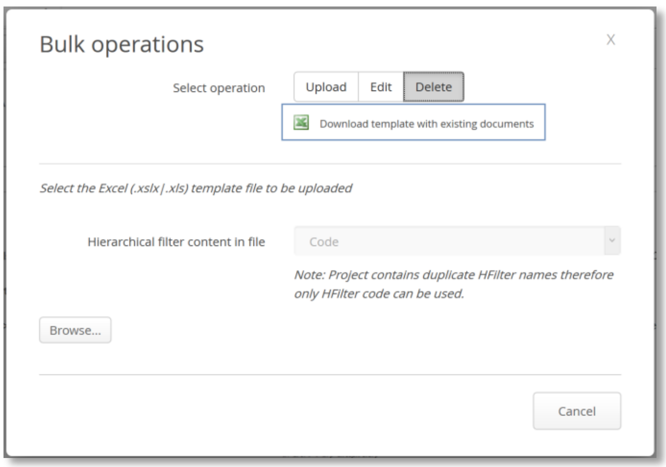
Follow these 4 steps to bulk delete files:

- **Step 1:** Download the Excel file that contains data on all existing files
- **Step 2:** All the files that will be deleted must be kept in the Excel file. Any files that you do not want to delete must be removed from the Excel file
- **Step 3:** Upload the Excel file
- **Step 4:** All files in the Excel file will be deleted

4.4.3.1 Prepare the Excel File

You can download the Excel file with information about all the existing files by clicking the option highlighted in the image below.

The image below shows the button you can click to download the Excel file.



<u>Note:</u>

- All the files to be deleted need to be kept in the Excel file
- All files to be kept in the Document Archive must be deleted from the Excel file

4.4.3.2 Upload the Excel File

To upload the Excel file, follow these 5 steps:

- **Step 1:** Open the Bulk Operations window
- **Step 2:** Select the ‘Upload’ option from the dropdown list
- **Step 3:** If the project contains hierarchical filters, then select if the codes or the names have been used in the Excel file
- **Step 4:** Browse for the Excel file (the name of the file does not matter)
- **Step 5:** Start the upload

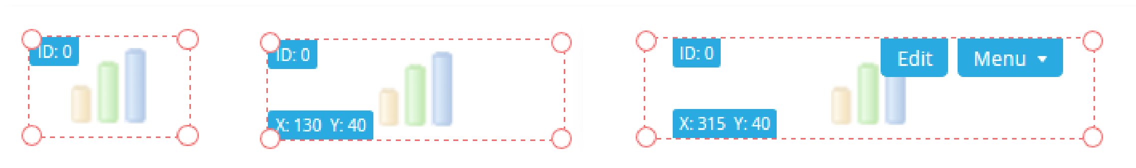
5 - Storyteller Improvements

5.1 Working with Objects

5.1.1 Object Behavior Updates

There is now an easier way to work with objects in Storyteller, thanks to a few new updates. Each update is described in further detail below.

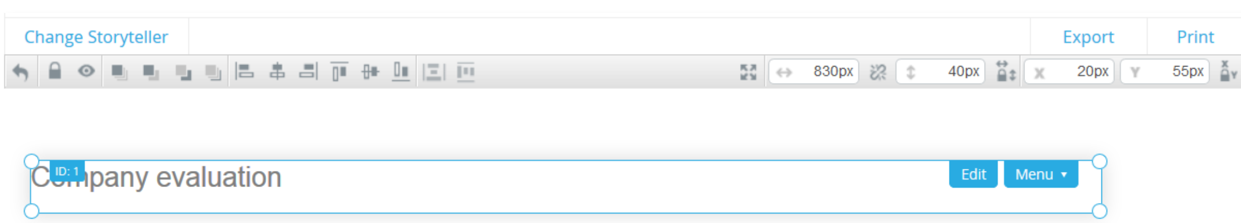
- You can now double click on an object to enter edit mode.
- The object ID, Edit button, Menu button, and the size & position information that are shown when you mouse-over an object are now dynamic based on the size of the object. The image below shows a few different examples of the new layouts.
    - *The image below shows 3 examples of objects with different sizes and different visible information. If the Menu or Edit button is not shown, you can always double click or right click to enter edit mode.*



- To make it easier to select multiple objects the “Menu” and “Edit” buttons are hidden from all objects when pushing the Ctrl button on your keyboard. This minimizes the risk of entering an object rather than selecting an object.

5.1.2 Size and Position Toolbar

A new toolbar has been added in Storyteller to make it more efficient to work with the objects. See an example of the new toolbar below.



You can now find all of these settings within this toolbar:

General Control Settings

- Undo (size/position)
- Lock (size/position)
- Hide

Alignment Settings

- Align left
- Align horizontal center
- Align right
- Align top
- Align vertical center
- Align bottom
- Distribute vertical
- Distribute horizontal
- Bring to front
- Send forward
- Send backward
- Send to back

Position Settings

- Full size
- Width in pixels
- Height in pixels
- Maintain aspect ratio
- Lock sizes of all objects
- X coordinate position
- Y coordinate position
- Lock position of all objects

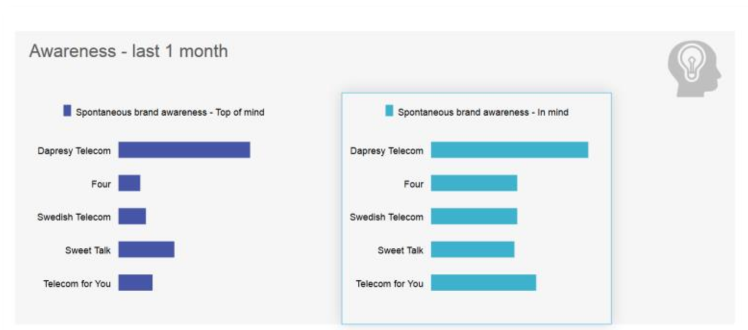
Tip: We noticed that the ‘Lock’ options are not used very often, but these are great to use when working in slides with many objects. For example, if the slide contains many objects that need to be moved around, just use the ‘Lock Size’ setting, then you will never be able to change the size by mistake. And, use the Lock position if you want to change the size of an object so you don’t move it by accident.

<u>Note:</u> The Hide and Lock functions are applied to the objects as long as you are working in the page. If you close the page or enter preview mode, then the Lock and Hide functions will go back to default mode.

5.1.3 Turning Objects Boarder On and Off

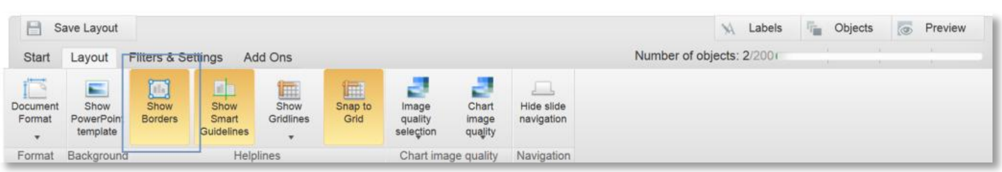
You are now able to turn off object boarders. This makes it much easier to see the results from an end user perspective during the setup of the Storyteller. When this setting is activated, the boarders will still be shown on selected object, so even if the boarders are turned off you can still move and resize the objects.

The image below shows a Storyteller with object boarders turned off. As you can see, the boarders are only shown for the selected object.



To turn on/off the boarders, simply enter the Layout tab and click the ‘Show boarders’ button.

The image below highlights the new option for turning boarders on and off.

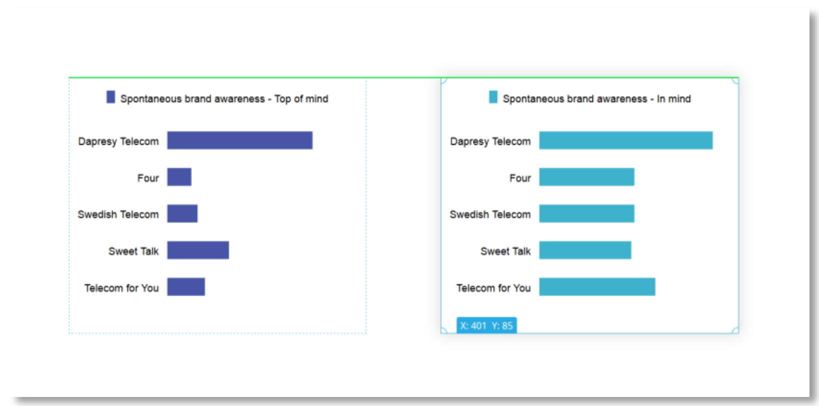


Tip: Turn off the boarders if you want to preview your report faster since you don’t need to enter preview mode and reload the whole report!

5.1.4 Smart Guidelines

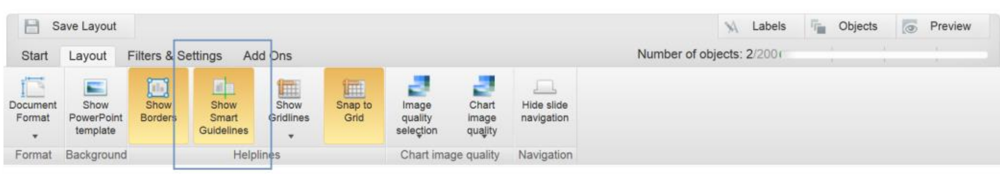
A new "smart guidelines" function has been added so that you can easily align objects with each other when moving an object. This function is similar to PowerPoint, how guidelines appear when you move two objects and want to exactly align them with each other.

The image below shows a Storyteller with guidelines turned on. As you can see, a green line indicates that the two charts are aligned with each other. The green line will appear as soon as the selected object has the same Y position as any other object in the same slide.



To turn on/off the smart guidelines, enter the Layout tab and click the 'Show Smart Guidelines' button.

The image below highlights the new option for turning smart guidelines on and off.



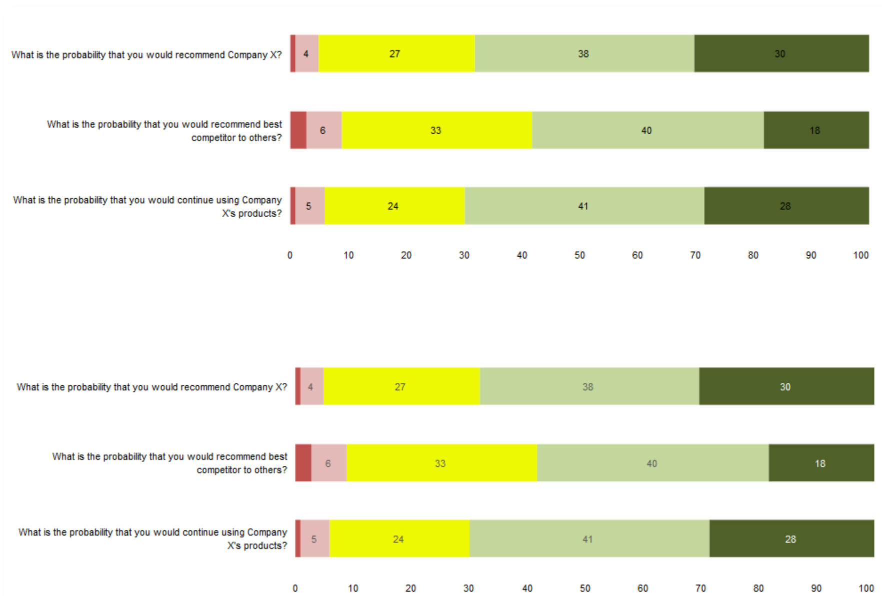
5.2 Storyteller Charts

5.2.1 Data Labels - A New Two-Color-Logic

In certain charts, the data labels can sometimes be hard to read. For instance, if a dark label is placed on a dark background, or vice versa. The first chart in the image further down is a typical example of this: a black data label that is hard to read because it is on a dark green background.

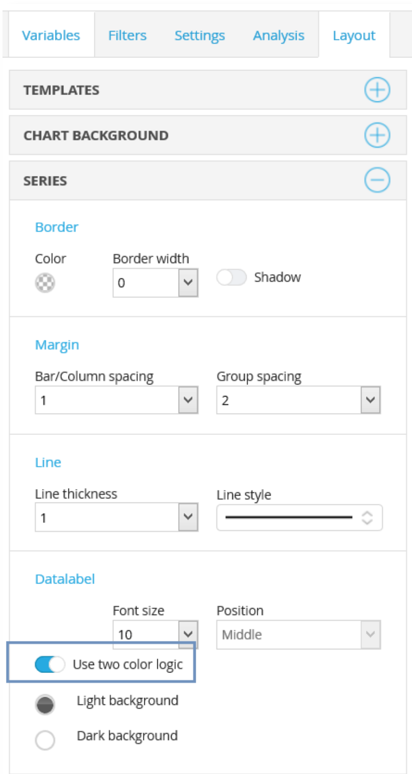
To solve this issue, Dapresy has added a new 'two-color-logic' data label setting for stacked column and bar charts, and for pie & donut charts. This is an automated logic, while setting up the chart you can define a light and a dark data label, the system will evaluate your options and determine which one to show based on the background color. In the second chart in the image below, you'll see an example where both white and black data labels are shown in the same chart.

The first chart below shows a typical example where some of the data labels are hard to read. The second chart below shows an example of the new two-color-logic which solves the issue.



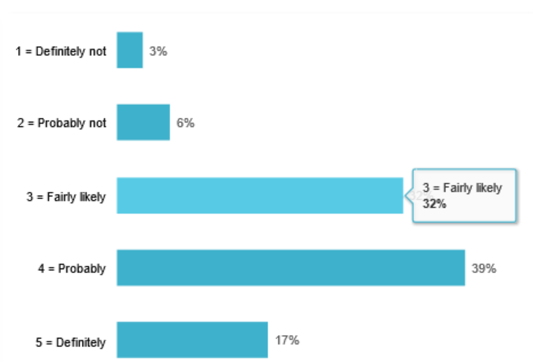
To use the new two-color-logic, simply activate the option highlighted in the image below. Then define the color of the data label that will be shown on a light background, and the label color that will be shown on a dark background.

The image below shows the new two-color-logic setting which can be used in stacked column and bar charts, and in pie & donut charts.



5.2.2 Units Now Shown in the Tooltip

If a unit is shown in a series, like in the examples below (the % sign), then it will now also appear in the tooltip.



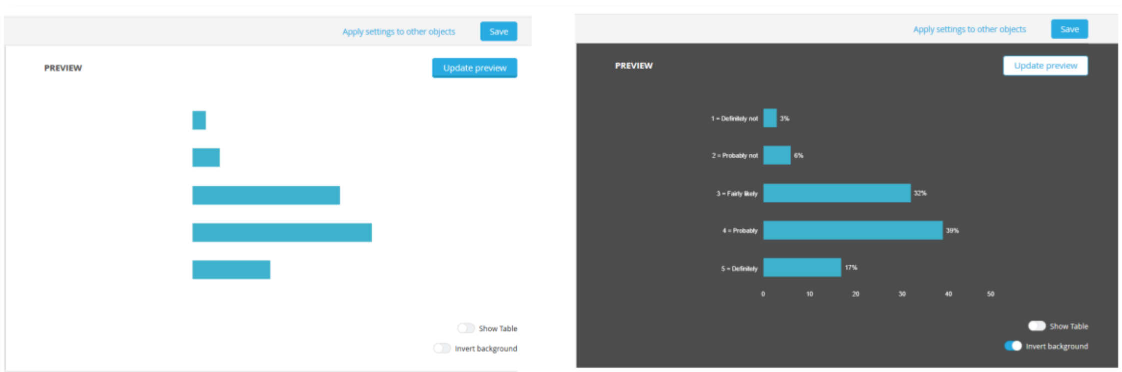
<ins>Note:</ins> No new settings have been added. The unit will automatically appear in the tooltip if it is shown in the series.

5.2.3 Invert Background Color in Edit Mode

A chart's edit mode uses a white background, so when a chart has white labels, you cannot see them. The left chart in the image below showcases an example of this.

Now, there is an option to invert the background color so that you can see the white labels. Simply tick the option 'Invert background' in the bottom right corner, and the background color will change, as seen in the image below.

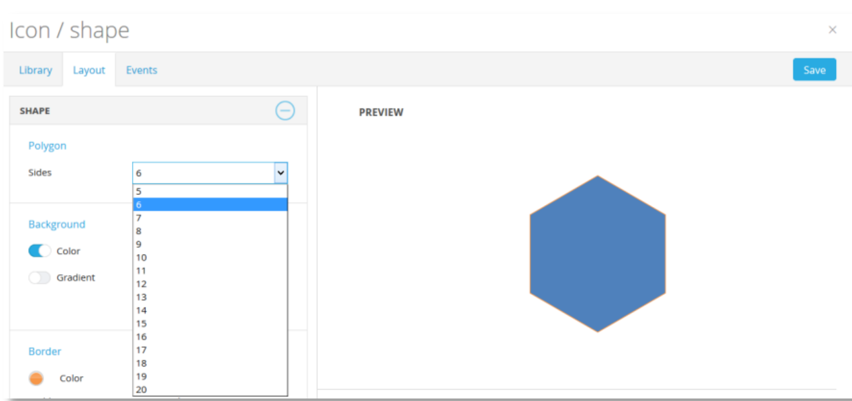
The right chart in the image below shows a chart with inverted background. The option is located in bottom right corner of the chart.



5.3 New objects in Icon & Shape Library

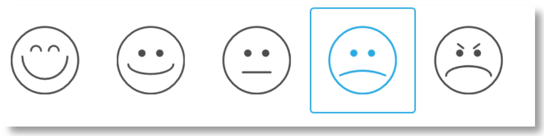
A polygon shape is now available in the Icon & Shape Library. The polygon shape has the same settings as other shapes, but with the polygon, you can select the number of sides (5-20). Six sides is the default.

The image below shows the new Polygon shape.



Previously the library contained four smiley icons. A fifth one has now been added so that the below set of icons can be used to visualize a five grade scales.

The image below shows all the smiley icons. The highlighted one is new.



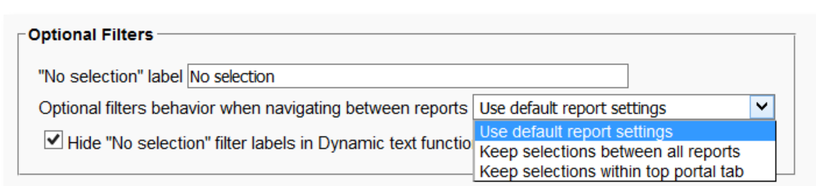
5.4 Portal Navigation - Keep Filters when Changing Reports

Previously, the hierarchical filter selections were kept the same when navigating between different Storyteller reports, but other optional filters like filters, moving average, variable subsets, etc. were not saved.

A new project level setting has been added to allow filters, variable subsets, etc. to be kept when changing reports. This new setting defines the behavior when navigating between reports. This new setting is located in the Project setting page. The following three options are available:

- Use default report settings (the old logic)
- Keep selections between all reports
- Keep selections within top portal tab

The image below shows the new project level setting that is located in the Project settings page.



The following logic will be used when the optional filter selection will remain when navigating between reports:

- If the selected optional filter items are present in the current report, then the selections remain in the target report

- If the target report does not contain some of the optional filter items that are selected in the current report, then these are ignored in the target report
- If the target report has optional filter items that do not exist in the current report, then these items get the ordinary default values in the target report
- If the current report has multi-selection in, for example, a Filter list or the Variable subset list, and these are not allowed in the target report, then only the first of the selected Filters/Variable subsets are selected in the target report
- If the current report has an option (like week or month) selected within an item (like the Interval selection list) that does not exist in the target report, then the ordinary default setting is applied to that specific item in the target report

5.5 “No data” labels

The “No Data” label that is shown when an object in the Storyteller does not show any data has been updated. The layout has been streamlined so that the same layout is shown in all types of object. You can also now translate the label via your own user interface languages (see chapter 9.1).

Below is the new layout of the No selection label. This layout is used for all objects.

<u>Note:</u> The new layout is only applied to newly created projects. Existing projects are still using the old layout. If you want to use the new layout in an old project, you can enable that in the Project settings page, as shown below.

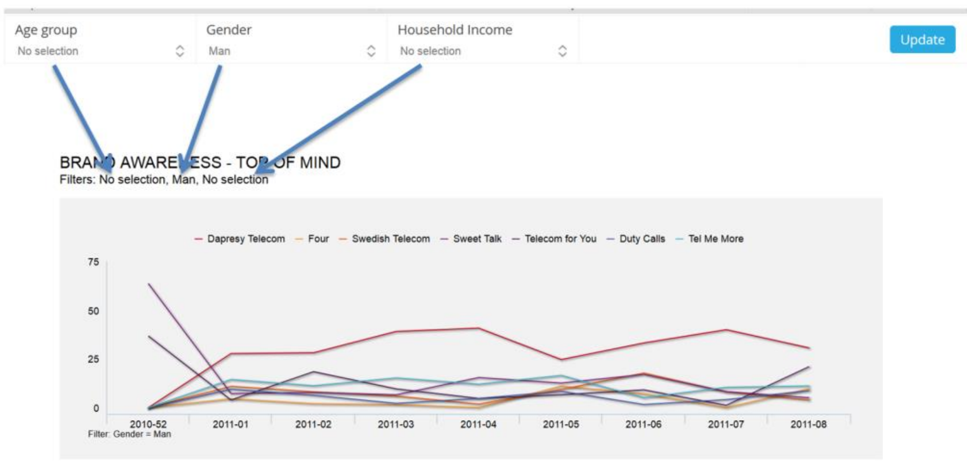
The image below shows the Project settings page and the option to use the new layout in an old project.

5.6 Improvements in Dynamic Text when no filters have been selected

In the Text object within the Storyteller, you can include the labels of the selected optional filters by using the Dynamic text logic. This logic has been improved to better handle filters with "No selection."

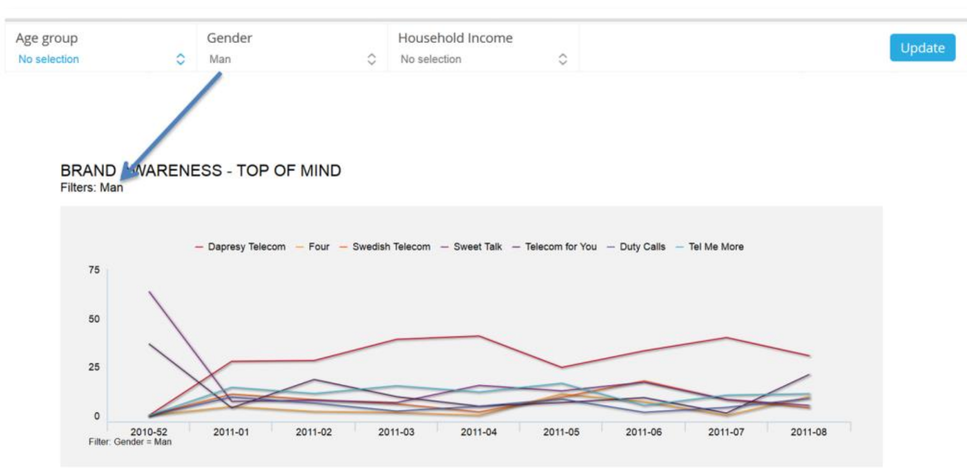
Previously, a "No selection" label was shown in the text box if "No selection" was selected in the optional filter. In the below example, you can see that "No selection" has been selected in two optional filters, therefore the "No selection" label appears twice in the text object, causing confusion for users.

The image below shows the old logic. As shown, the "No selection" text appears twice in the text box.



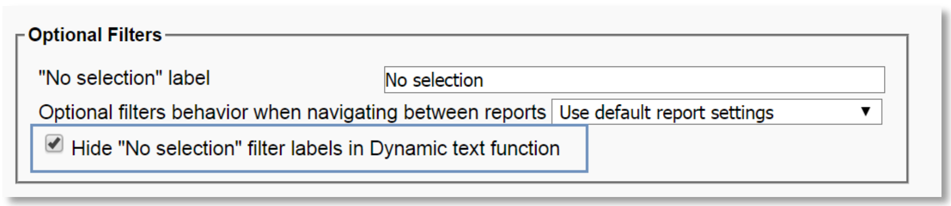
The new, improved logic hides the "No selection" labels so that the result will look like the image below. It hides unnecessary information, creating a more user-friendly experience.

The image below shows the new logic where the "No selection" labels are hidden in the text box.



The old logic is still used in all existing projects, but you can turn on the new logic in the Project settings page (see image below). The new logic will be used by default in newly created projects.

The image below shows how to define if the "No selection" label will be hidden or not. The setting is located in the Project settings page.



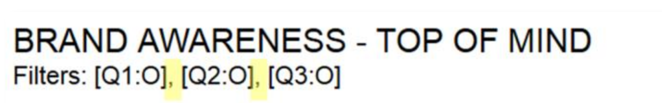
The following special rules are applied to the new logic to create a more attractive layout that does not contain extra commas or blank rows.

- Removing Commas

If "No selection" is selected in a filter that is used in the dynamic text, then the system automatically removes any commas and blank spaces if they appear just before the dynamic text.

The purpose of this logic is to remove any unnecessary commas that are not a part of the Dynamic text itself. Below is an example of a "normal" setup - the highlighted comma and blank space are removed if "No selection" is chosen in the corresponding filters.

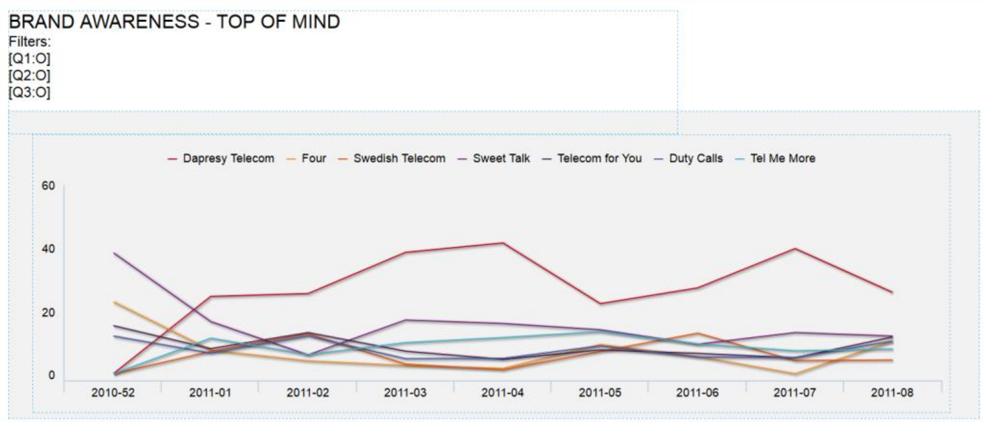
The highlighted commas and blank spaces in the images below will be removed if the corresponding filters have "No selection" selected.



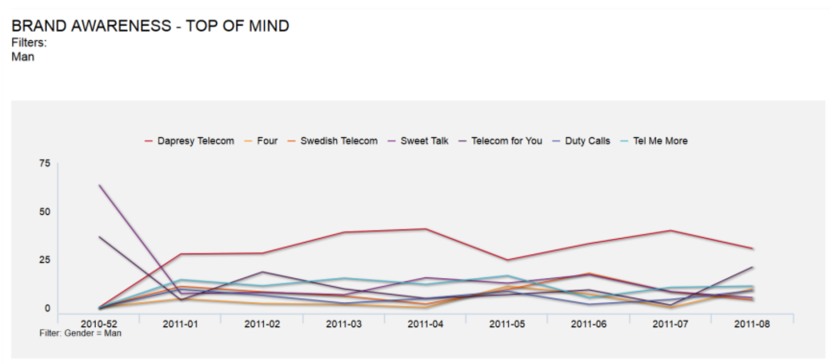
-Removing Rows

If a row only contains dynamic text (with no additional text), the whole row will be removed if "No selection" is selected in the filter. The purpose of this logic is to remove any unnecessary rows when the filters are shown as a "column," as seen in the example below.

The image below shows the setup. Each optional filter is shown in one row in the text box.



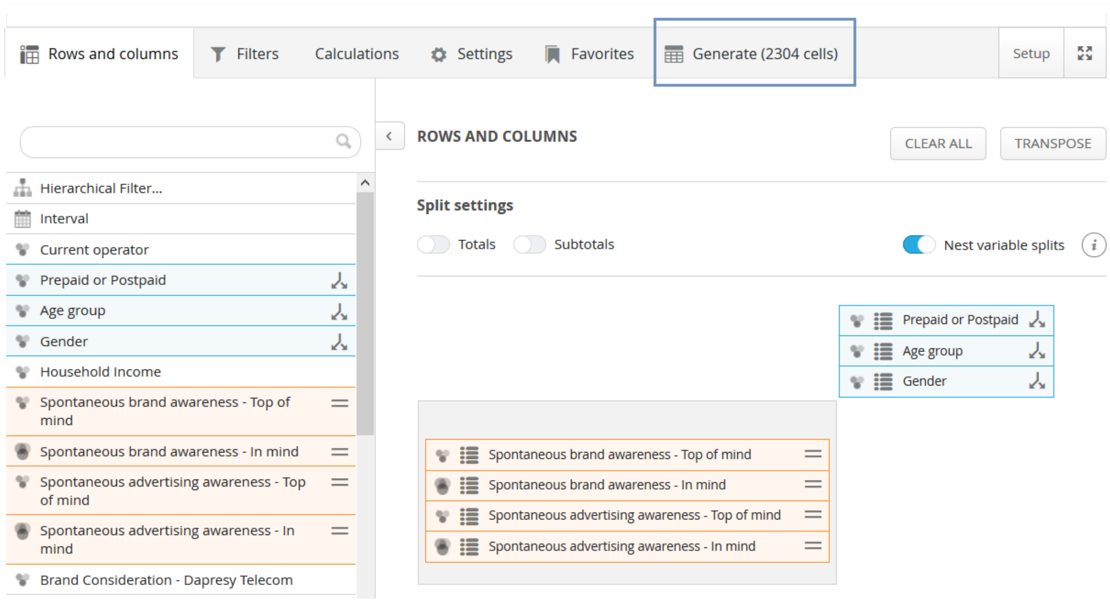
The image below shows the results when a filter option is selected in Q2 only. As shown, the Q1 row has been removed so that there are no gaps in the layout.



6 - Cross Table Tool 2.0

A new indicator has been added to the new cross table tool to indicate the number of cells to be calculated. The purpose of the indicator is to give report users an idea of how big the table will become, as a bigger table means longer calculation time. Also, report users sometime use nesting without fully understanding the impact. By indicating the number of cells to be calculated, the table setup can be changed before the table is generated.

The image below shows the indicator which is shown in the 'Generate' tab.



7 - Data Recoding

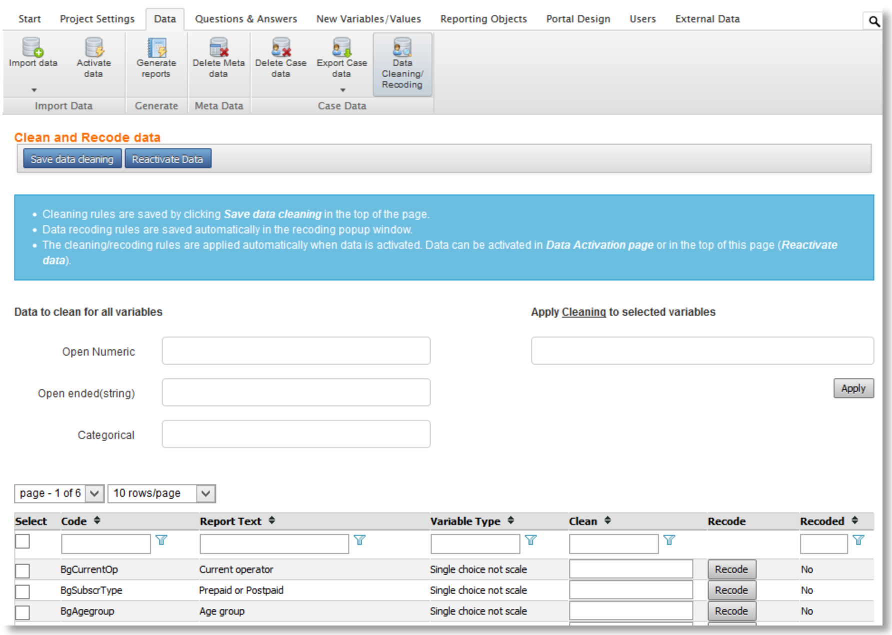
Previously, data cleaning was supported in Dapresy Pro. Now, new support has been added for Data Recoding in order to streamline the processes by manipulating less data outside the system.

The new data recoding function supports recoding into the same variable, not into another variable or into a non-existing answer alternative. If data needs to be recoded into a new variable, then the existing compute variable function can be used instead. Data also cannot be recoded into a grouped answer. If needed, simply update the grouped answer definition instead.

The recoding functionality logic is similar to the existing data cleaning function since data recoding rules are created per variable and run every time data is activated. Also, if a mistake is made, then the recoding rule can just be deleted. Once the data is activated again, then the original data comes back.

The new data recoding function has been added to the existing data cleaning page. The name of the page is now Data cleaning/Recoding.

The image below shows the page for data cleaning and recoding.



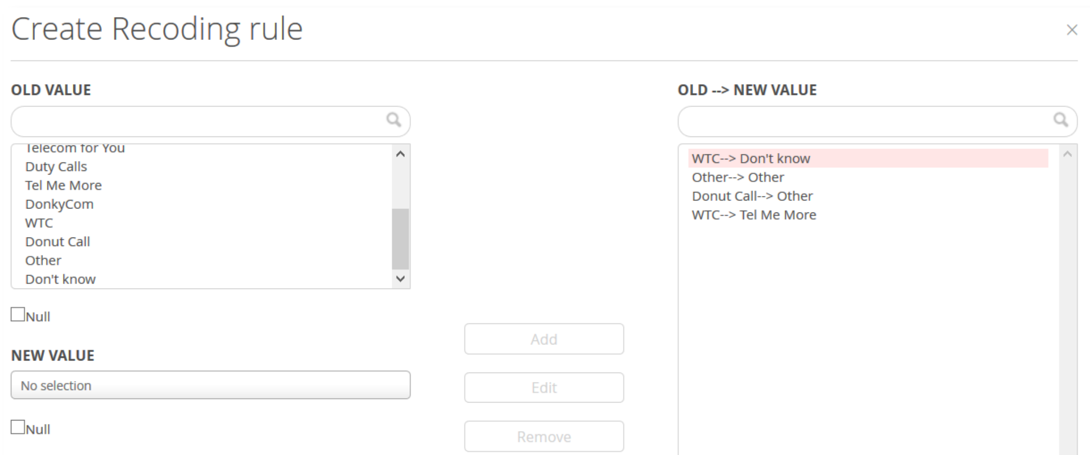
7.1 Create Recoding Rules

To create a recoding rule, click the new Recode option for the desired variable. This will open the recoding window.

The recoding window looks slightly different depending on what type of variable is being recoded (see details in the following chapters). In general, one or more values (**Old** values) are selected, and then the value is recoded (**New** value). You can also add a filter based on one variable to the recoding rule.

A variable can have unlimited recoding rules. If a variable has multiple rules that are overlapping each other, then only the latest one will be valid and applied to the data. The non-valid rules are marked in red, as shown in the example below.

The image below shows a variable with four recoding rules. As the first and last rules are overlapping each other, the first one becomes invalid and will not be applied to the data.



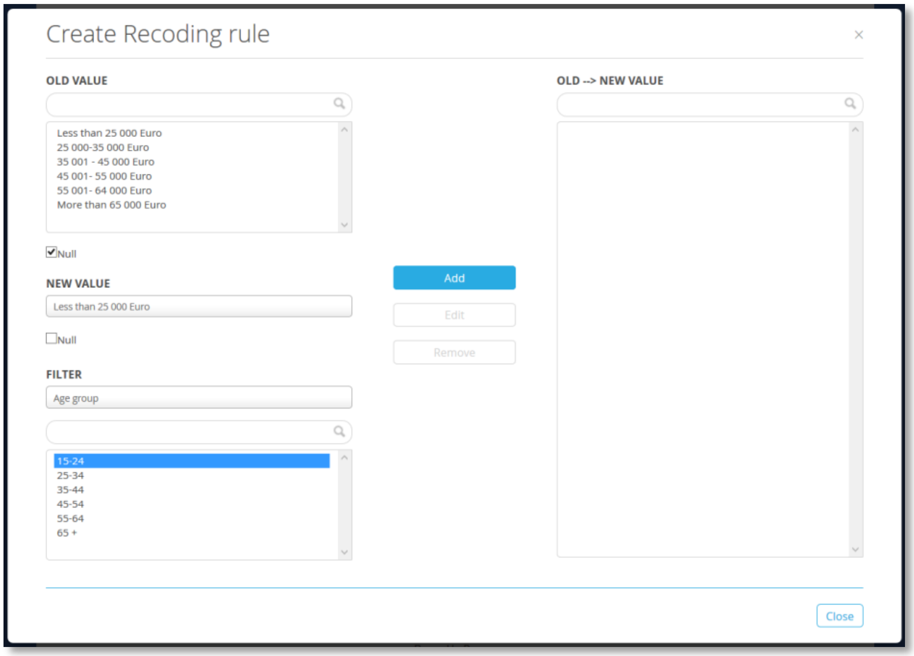
7.1.1 Categorical Variables

To create a rule for categorical variables, follow these 4 steps:

- **Step 1:** Select the OLD values (the values to be recoded). Multiple values can be selected and also NULL (missing answer)
- **Step 2:** Select the NEW value
- **Step 3:** Select if a filter will be applied or not (only one variable can be used as a filter in a recoding rule)
- **Step 4:** Click ADD

The recoding rule will now be saved and applied to the data next time the data is activated.

The image below shows the recoding rule window for categorical variables.



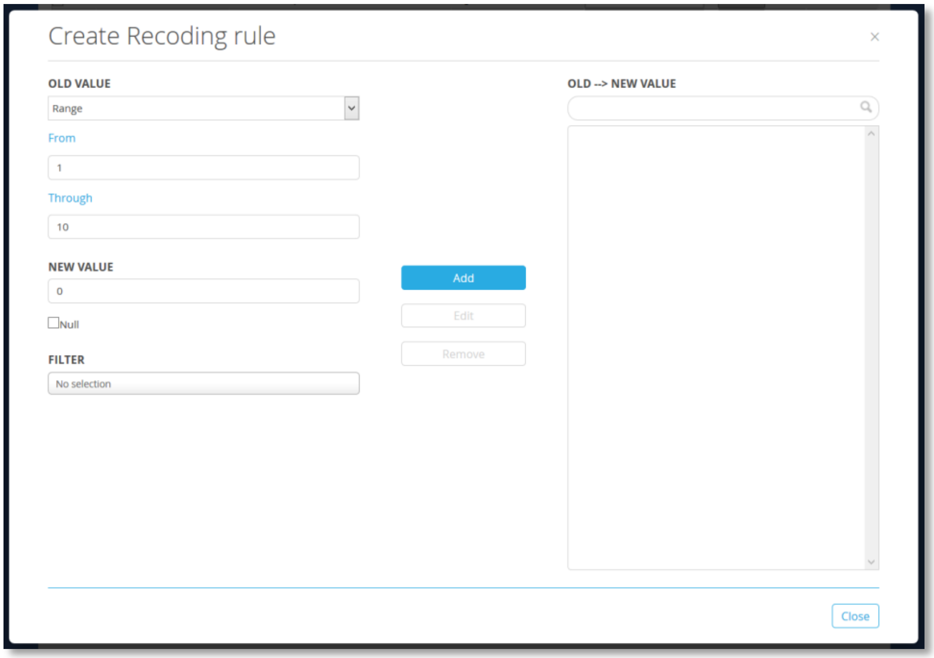
7.1.2 Numeric Variables

To create a rule for numeric variables, follow these 4 steps:

- **Step 1:** Enter the OLD values (the values to be recoded). Multiple values can be selected and also NULL (missing answer)
- **Step 2:** Enter the NEW value
- **Step 3:** Select if a filter will be applied or not (only one variable can be used as a filter in a recoding rule)
- **Step 4:** Click ADD

The recoding rule will now be saved and applied to the data next time the data is activated.

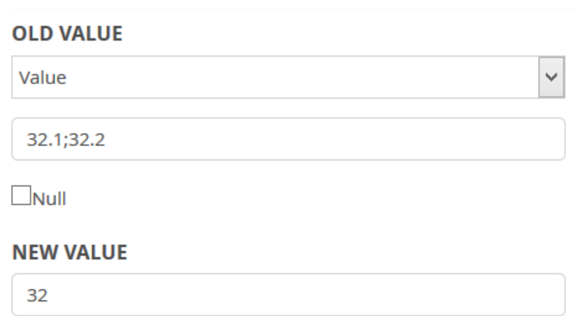
The image below shows the recoding rule window for numeric variables.



Note 1: Use a period (.) as a decimal separator if decimals are needed in the created rules.

Note 2: If multiple old values will be recoded, then use a semicolon (;) as the value separator.

The image below shows an example where the values 32.1 and 32.2 are recoded into 32



7.1.3 Open Ended (string) Variables

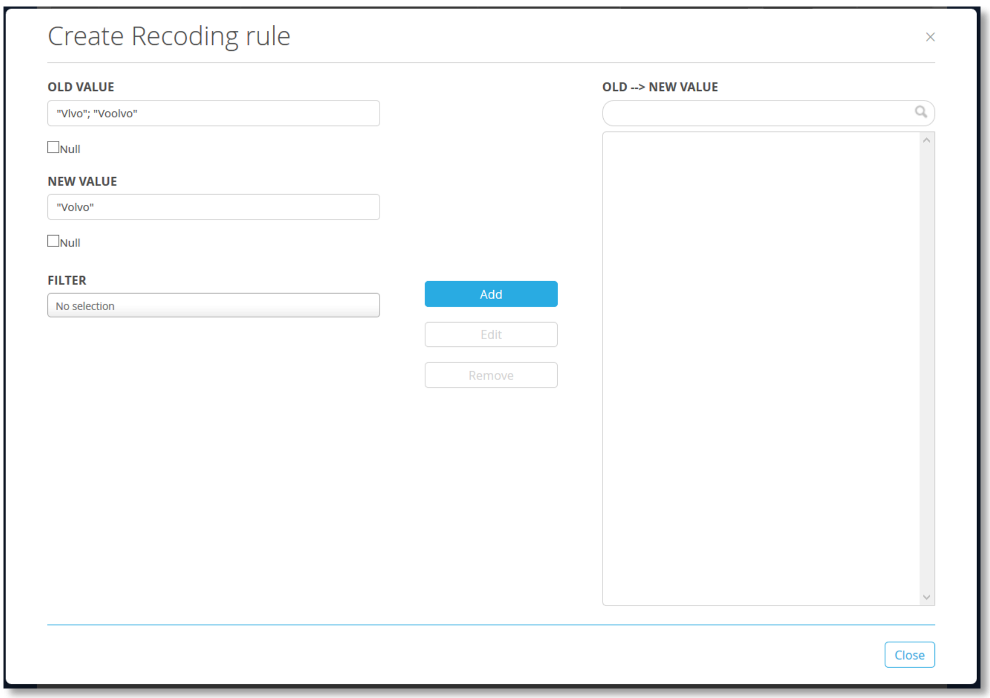
To create a rule for open ended (string) variables, follow these 4 steps:

- **Step 1:** Enter the OLD values (the values to be recoded). The string needs to be written within the quotation marks, as shown in the image further down

- **Step 2:** Enter the NEW value. The string again needs to be written within the quotation marks.
- **Step 3:** Select if a filter will be applied or not (only one variable can be used as a filter in a recoding rule)
- **Step 4:** Click ADD

The recoding rule will now be saved and applied to the data next time the data is activated.

The image below shows the recoding rule window for open ended variables.



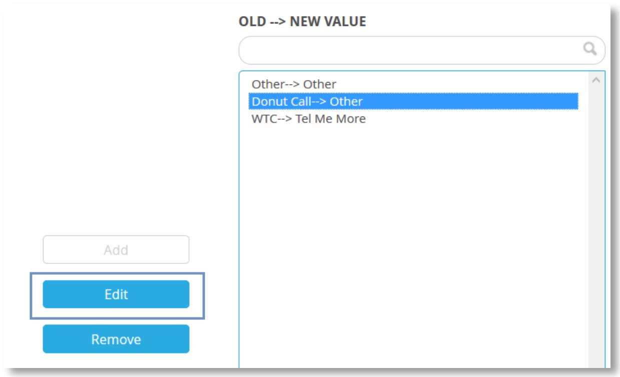
Note: When recoding data in an open ended variable, the defined part of the string is recoded and not the whole string. Below are examples:

- The open answer comment: “I like Vlvo”
- The old value in the recoding rule “Vlvo”
- The new value in the recoding rule: “Volvo”
- The result of the recoding: “I like Volvo”

7.2 Edit Recoding Rules

To edit an existing recoding rule, simply select the rule and click the Edit button in the middle of the screen. Make the changes and then click the Update button in the middle of the screen.

The image below highlights the Edit option.



Note: The rule is saved as soon as you click Update, but the data needs to be reactivated to make the changes in the data.

7.3 Copy Recoding Rules

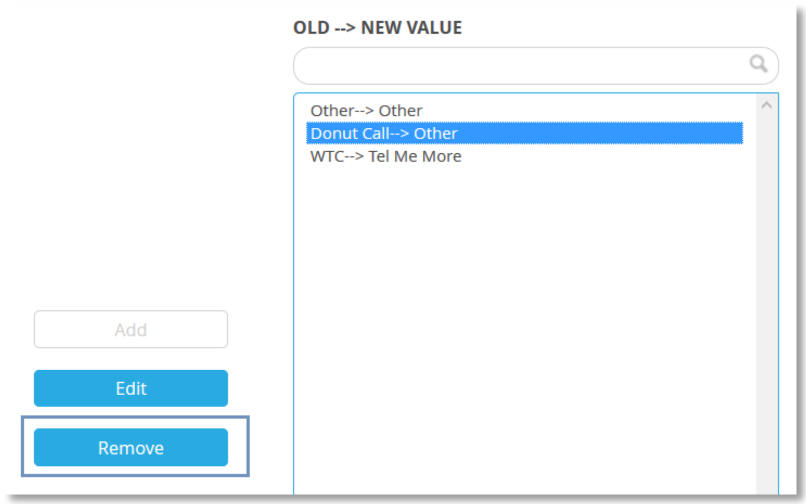
To copy an existing recoding rule, simply select the rule and click the Edit button in the middle of the screen. Make the changes and then click Add - it will be saved as a new rule.

Note: The rule is saved as soon as you click Update, but the data needs to be reactivated to make the changes in the data.

7.4 Remove Recoding Rules

To remove an existing rule, simply select the rule and click the Remove button in the middle of the screen.

The image below highlights the Remove option.



<u>Note:</u> The rule is deleted as soon as you click Remove, but the data needs to be reactivated to make the changes in the data.

8 - Hierarchical Filter Management Updates

8.1 Improved Performance

The performance has been greatly improved when deriving the hierarchical filter structure from the raw data. This significantly reduces loading times in both the Derive H-Filter form data screen and in the Data activating screen. Below are two examples of the improvements:

Derive H-Filter from data screen: In a project with 65,000 respondents it is now **5 times faster** to derive a hierarchical structure of 3,500 nodes in 7 levels.

Activate data screen: In a project with 65,000 respondents, 3,500 hierarchical filter nodes in 7 levels it is now 4 times faster to activate a second data file which also includes 65,000 respondents.

Note: The figures above can vary a lot between different projects since these actions are dependent on many settings in a project.

8.2 Improved Support for Moving Hierarchical Filter Nodes in the Tree Structure

In Dapresy Pro, the hierarchical filter structure is derived from the raw data. When a node needs to be "moved" into another "parent" node, this needs to be done by updating the raw data and then updating the hierarchical tree structure. The raw data can either be updated in the new Data recoding function or by manipulating the data outside Dapresy Pro. When the Hierarchical structure is updated, the system had previously interpreted the change as a node to be deleted and a new node to be added. Due to this logic, the access right of report users and other H-Filter related settings got lost in the "move" process.

A new smart logic allows you to keep all the H-Filter related settings when a node is moved. This new logic can be used when a "Complete update" is made in the Derive H-Filter from data screen. When this operation is made, the system searches for nodes to be deleted and nodes to be added. If a node to be deleted has the same name as a node to be added, then the system will suggest that the change be treated as a "moved node" so all H-Filter related settings are kept. The Administrator user can then decide if the change will be treated as a moved node or treated as one node to be deleted and one to be added.

The following hierarchical filter related settings will be kept if an update is treated as a "moved node":

- Report user access rights to the moved Hierarchical filter node
- The document connection to the moved Hierarchical filter node in Document archive 2.0

- The images uploaded to the moved Hierarchical filter node in the Dynamic image module
- The report setting of the moved hierarchical filter node which defines which hierarchical filter node to be shown in the Storyteller, Cross table tool 2.0 and Document archive 2.0
- The Hierarchical filter node settings in the page Variable subsets Vs hierarchical filters

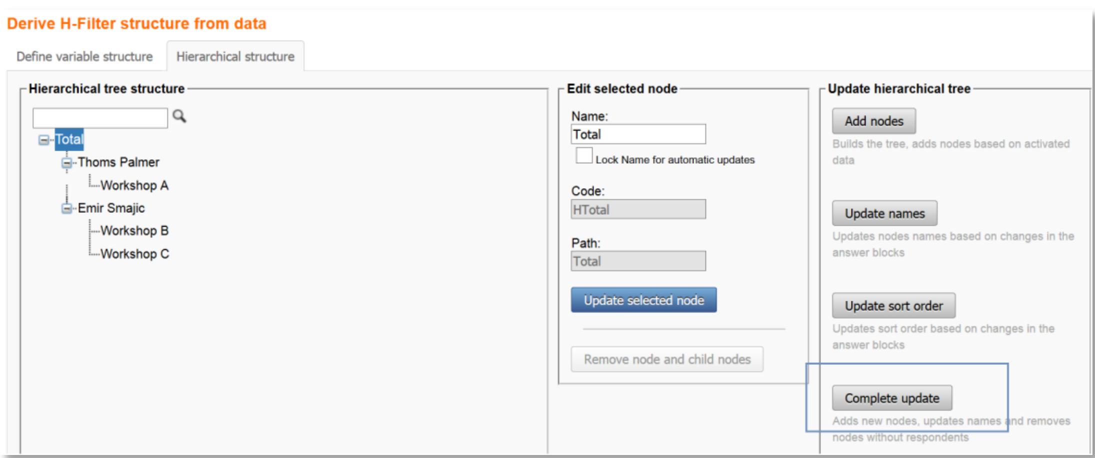
8.2.1 Setup

The new "move" logic can be applied to an update in both the 'Derive H-filter from Data' screen and in the 'Import scheduler' screen. See details in the following chapters.

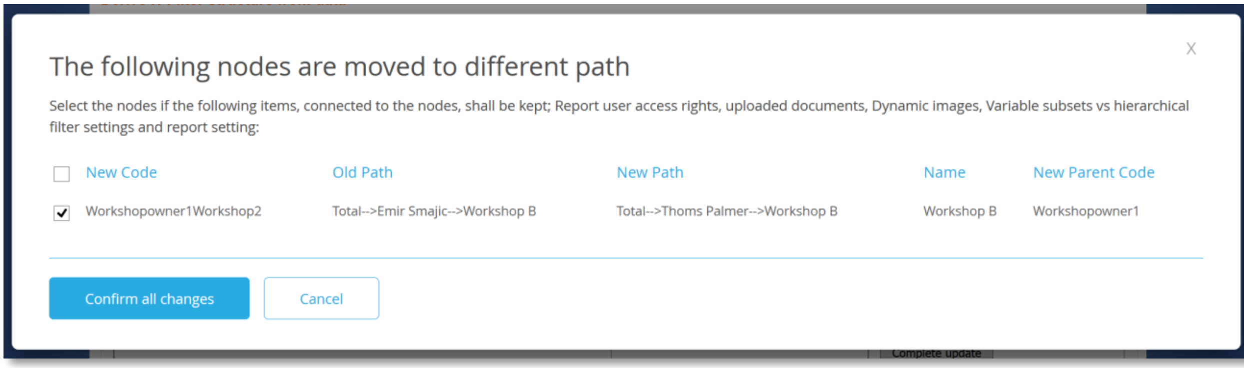
8.2.1.1 Derive H-filter from Data Screen

You will have the ability to move a node once you select 'Complete update' from the 'Derive H-Filter structure from data' screen. As mentioned above, the process is based on a matching names. The system will suggest to treat a change as a "move" if one of the nodes that is to be deleted has the same name as one of the nodes to be added.

The image below shows the 'Complete update' button.



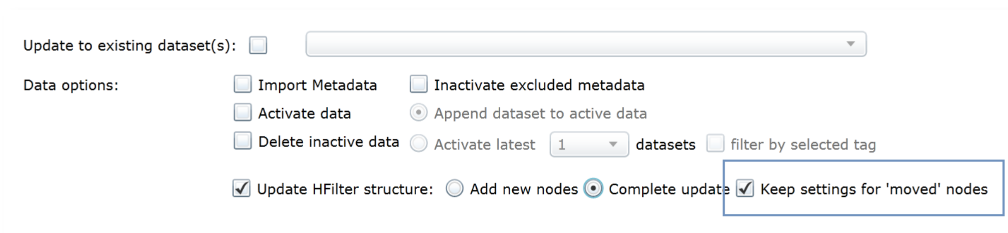
The image below shows the 'Complete update' window and the new "Move node" area. Tick the check box for the nodes to be moved if you want to keep the hierarchical filter related settings. Un-tick the check box if the update will be treated as one node to be deleted and one to be added if you don't want to keep the settings.



8.2.1.1 Import Scheduler Screen

When setting up an Import schedule, you can define if any hierarchical filter updates that are detected as "moved nodes" will be treated as a moved node or not. The new option is named "XXX" and appears only in the interface if the "Complete update" option is activated.

The image below shows the new option in the Import scheduler page.



9 - Improved Multi-Language Support

The multi-language support has been greatly improved. You can now translate much more of the project specific labels such as Filters, Variable subset names, Portal tab names, Text boxes and more into multiple languages. You can also create your own user interface language if the language you would like to use is not supported in Dapresy Pro.

There are two different types of labels in the system:

- **User interface labels**: These are buttons (Apply, Print, Export, etc.), loading bar labels, tooltips, etc.
- **Project specific labels**: These are question texts, answer texts, filters, portal tabs, variable subsets, text boxes, etc.

Each of these label type has a different updating process. The next few chapters will describe how to work with these two kind of labels.

9.1 User Interface Languages

In the report user views, Dapresy supports English, German, French and Swedish. If you would like to use another language, you can now simply create a new user interface language by yourself. It can be a brand new language or different version of another language.

The languages you create are stored in a language library, therefore each language can be used in multiple projects. If a language is updated in the library, then all projects using that language will automatically use the updated version.

The languages you create are client specific, like your projects. This means that only you and the other administrators within your company can see and use the user interface languages you create.

In the following chapters, you will learn how to create and maintain your own languages and how to use them in your projects.

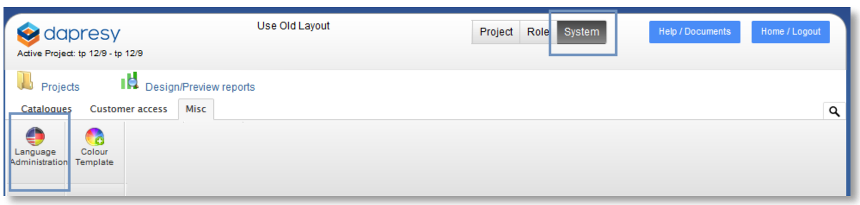
Note: The following parts of the system supports newly created user-interface languages:

- **Document archive 2.0 report:** All labels shown for the report users
- **Form:** All labels shown for the Report users
- **Storyteller:** All labels shown for the Report users except for the following: Optional chart setting functionality, My Stories functionality, Calendar controls (months and weekdays)

9.1.1 Language Administration Page

The new ‘Language Administration’ page is located in the ‘System’ administration tab, as shown below. If you don’t have access to this page, then please contact the support team or your account manager.

The image below shows where to find the new Language Administration page where you can create and maintain your own user interface languages



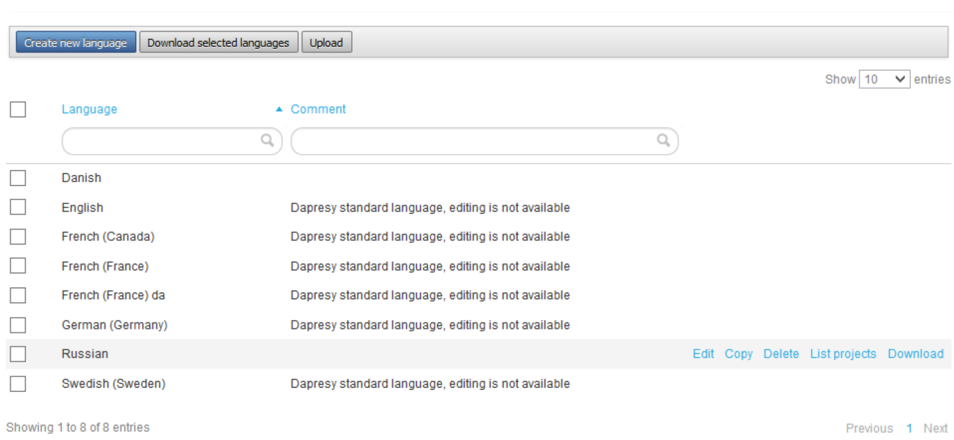
Follow these 4 easy steps to create a new language:

- **Step 1:** Name the new language
- **Step 2:** Download the Excel file that contains all buttons, labels, etc. that need to be translated
- **Step 3:** Make the translations in the Excel file
- **Step 4:** Upload the revised Excel file

The image below shows the new Language Administration page. At the top of the page you will find buttons to create a new language as well as the download/upload options. In the middle of the page you will find a grid that lists the five standard languages as well as your created languages.

Note: You do not have the access rights to edit the standard languages, but you can copy one of those languages and then make edits in your own version.

The image below shows the Language Administration page. In this case, the user has created Danish and Russian. The grid also lists the five standard languages.

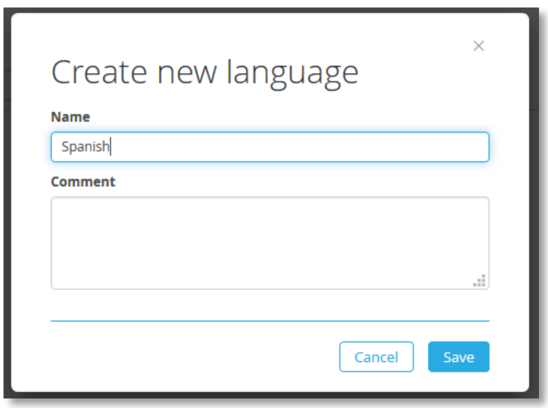


9.1.2 Creating a New Language

To create a new language, first click 'Create new Language' from the top left corner of the page. This will open a window where you have to enter a name for the new language (the names of your languages must be unique).

If needed, you can also enter a comment about your language. The comment is only shown in the Language Administration page and nowhere else in the system.

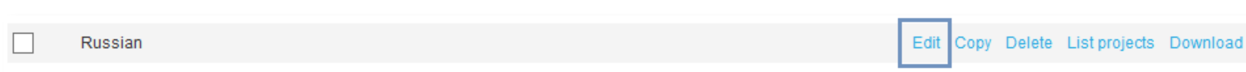
The image below shows the 'Create new language' window.



Tip: When creating a new language, all labels are in English by default. If you want to create a new language based on a different language, then use the copy language function instead of creating a new language.

To edit the name or comment of an existing language, just click the 'Edit' option shown in the image below.

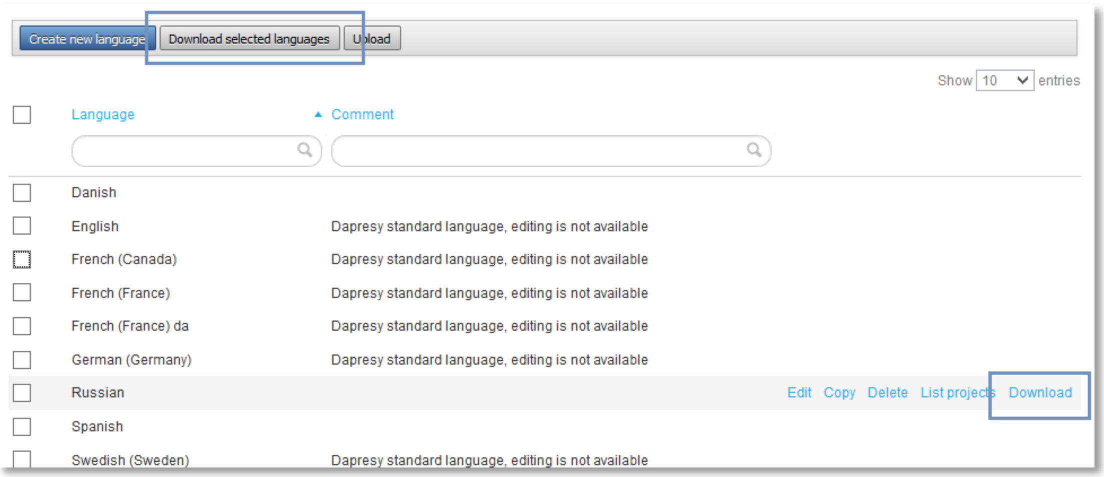
The image below shows the 'Edit' option.



9.1.3 Make Translations via the Download/Upload Process

As mentioned above, the translations are made in an Excel file which is downloaded and then loaded back into the system. To download the Excel file, you can click the 'Download' option that appears when you hover over a language. If you want to download multiple languages, simply tick the relevant check boxes and use the 'Download selected languages' button at the top of the page.

The image below highlights the download options.

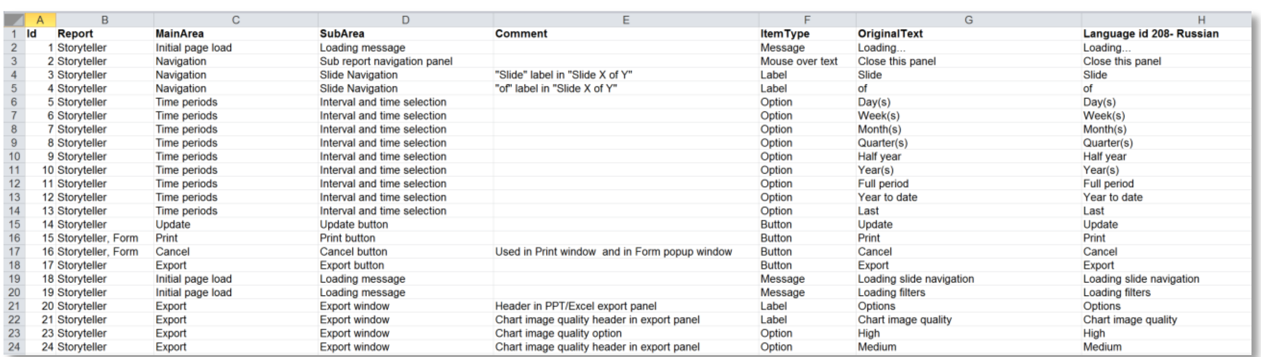


The downloaded Excel file consists of two sheets:

- Storyteller and Form
- Document archive 2.0

The translations are made in column H, as shown in the image below. Columns B-E provide information on where the text is shown in the system. Column F tells you what type of text it is. It can be a label, a button, an option (for example, in a dropdown list), a message, or a mouse over text, see examples of each type further down.

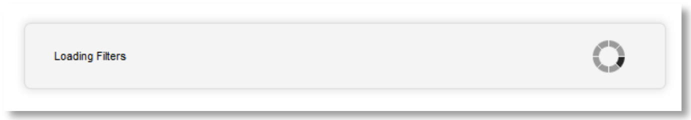
The image below shows the Excel file. In this example, the file only contains the Russian language.



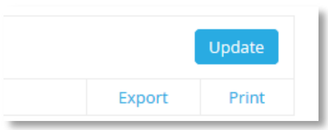
	A	B	C	D	E	F	G	H
1	**Id**	**Report**	**MainArea**	**SubArea**	**Comment**	**ItemType**	**OriginalText**	**Language id 208- Russian**
2	1	Storyteller	Initial page load	Loading message		Message	Loading...	Loading...
3	2	Storyteller	Navigation	Sub report navigation panel		Mouse over text	Close this panel	Close this panel
4	3	Storyteller	Navigation	Slide Navigation	"Slide" label in "Slide X of Y"	Label	Slide	Slide
5	4	Storyteller	Navigation	Slide Navigation	"of" label in "Slide X of Y"	Label	of	of
6	5	Storyteller	Time periods	Interval and time selection		Option	Day(s)	Day(s)
7	6	Storyteller	Time periods	Interval and time selection		Option	Week(s)	Week(s)
8	7	Storyteller	Time periods	Interval and time selection		Option	Month(s)	Month(s)
9	8	Storyteller	Time periods	Interval and time selection		Option	Quarter(s)	Quarter(s)
10	9	Storyteller	Time periods	Interval and time selection		Option	Half year	Half year
11	10	Storyteller	Time periods	Interval and time selection		Option	Year(s)	Year(s)
12	11	Storyteller	Time periods	Interval and time selection		Option	Full period	Full period
13	12	Storyteller	Time periods	Interval and time selection		Option	Year to date	Year to date
14	13	Storyteller	Time periods	Interval and time selection		Option	Last	Last
15	14	Storyteller	Update	Update button		Button	Update	Update
16	15	Storyteller, Form	Print	Print button		Button	Print	Print
17	16	Storyteller, Form	Cancel	Cancel button	Used in Print window and in Form popup window	Button	Cancel	Cancel
18	17	Storyteller	Export	Export button		Button	Export	Export
19	18	Storyteller	Initial page load	Loading message		Message	Loading slide navigation	Loading slide navigation
20	19	Storyteller	Initial page load	Loading message		Message	Loading filters	Loading filters
21	20	Storyteller	Export	Export window	Header in PPT/Excel export panel	Label	Options	Options
22	21	Storyteller	Export	Export window	Chart image quality header in export panel	Label	Chart image quality	Chart image quality
23	23	Storyteller	Export	Export window	Chart image quality option	Option	High	High
24	24	Storyteller	Export	Export window	Chart image quality header in export panel	Option	Medium	Medium

Below you will see examples of the different text types. The type is specified in column G in the Excel file.

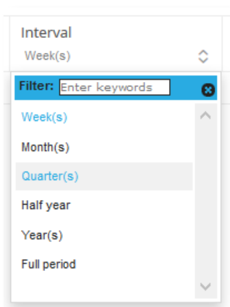
The image below shows the text type “Message”



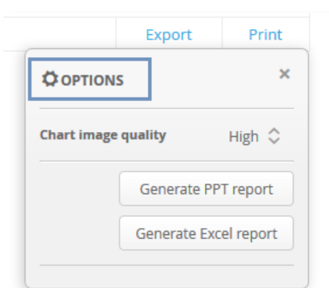
The image below shows multiple examples of the text type “Button”



The image below shows multiple examples of the text type “Option” (the options are Week(s), Month(s), Quarters etc.)



The image below highlights the text type “Label”



To load the file back into the system after the translations are complete, use the upload option at the top of the page.

The image below shows the upload option.

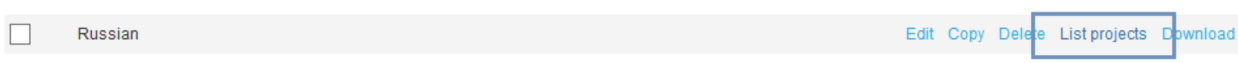
Note: When the file is loaded back into the system, it has to contain the Language column(s) and also the ID, Item Type and Original text columns. These must not be changed during the editing process. The other columns (Report, MainArea, SubArea and Comment) do not need to be included in the uploaded Excel file.

Note: If you create your own language, any new features added by Dapresy will be shown in English until you update your own languages.

9.1.4 Check Which Projects Use Language

To check which projects use one your languages, click the 'List project' option that appears on hover over (see the image below).

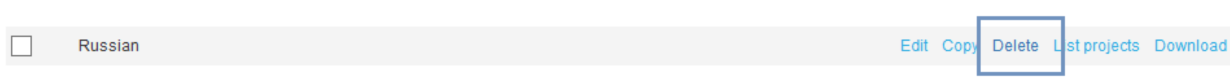
The image below highlights the 'List projects' option. Use this to see which projects use the language.



9.1.5 Delete Language

To delete a Language, click the "Delete" option that appears on hover over. We recommend first checking which projects use the language to ensure it is not being used in any live project.

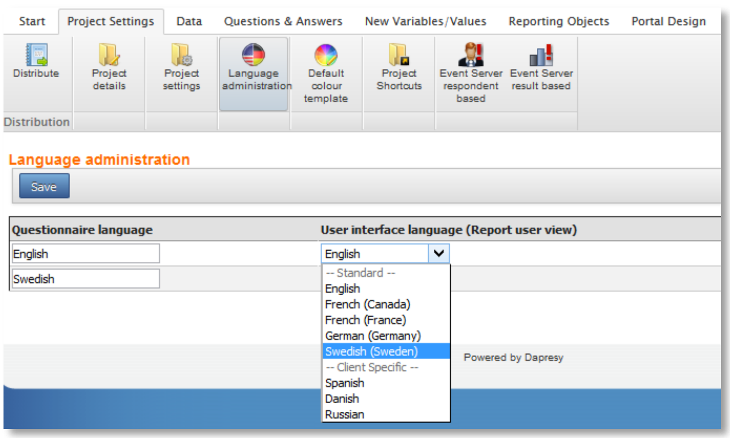
The image below highlights the 'Delete' option.



9.1.6 Use Your Languages in a Project

Your own languages can be used in projects the same way that the standard languages are used. In the image below, you will see the Language Administration page - the list is split up between standard and client specific languages.

The list below shows the Language Administration page in a project.



9.2 Project Specific Labels

Previously, multiple languages of project specific labels were only supported in the question and answer texts. Now, most of the project specific labels shown to report users support multiple languages. Below are the areas that now support multiple languages:

General items:

- Portal tab names
- Variable subset names
- Question block names
- Filter names

Storyteller:

- The Hierarchical filter header
- Optional filter headers such as Moving average, Floating time periods, etc.

- Text boxes (including tooltips)
- Labels defined in charts such as Mean value series, Percentile and axis information label
- Labels defined in tables such as Mean value series, base size label, etc.
- Labels defined in Respondent table such as links to Forms and column headers
- Tooltips in Icon & shapes
- Tooltips in Dynamic icon & shapes

Form Items:

- Text boxes
- Headers defined in the data fields
- Tooltips in Icon & shapes

Cross Table Tool 2.0:

- The Hierarchical filter header

Document Archive 2.0:

- The Hierarchical filter header

All items above can be translated into multiple languages via an Excel download/upload process (see chapter 9.2.1) or via a new "Label panel" interface located in the Storyteller and Form (see chapter 9.2.2).

The Storyteller, Form, Document Archive 2.0 and Cross table tool 2.0 items can also be translated directly in the setup interface of the reports/objects. Within the interface, you can select what language the report will be shown in (see chapter 9.2.3)

Note: The following items do **not** support multiple languages in the Storyteller:

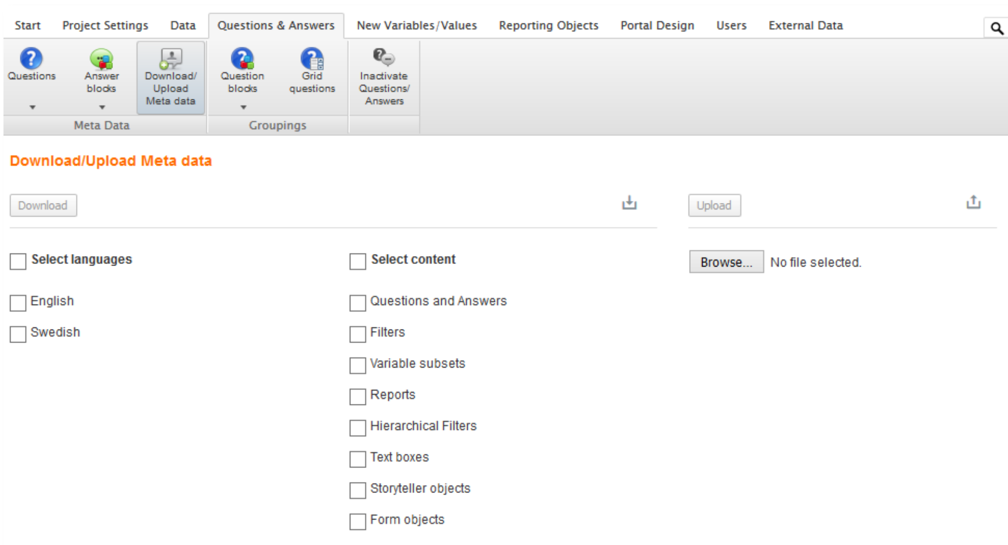
- Any labels defined in the old Cross table tool component
- Headers/Footers of an object
- Text & Media box

- ”Cell formatting” legend in tables
- Scatter bubble labels

9.2.1 Translations Via the Excel Download/Upload Process

If the translations will be made via the Excel download/upload process, then use the ‘Download/Upload Meta data’ screen. Previously in this tab, you could download questions and answers. Now, you can select which items to include in the Excel file (as shown in the image below).

The image below shows the Download/Upload Meta data tab. Before downloading the file, you have to select which languages and items to include in the file.



The “Select content” list shown in the image above only shows relevant items. For instance, if the project doesn’t have any Storyteller objects that require translations, then the “Storyteller objects” are not shown in the list above. The same goes for all other items.

The downloaded Excel file has one sheet for each item, as shown in the image below. See details about each sheet in the following chapters.

The image below shows the format of the Excel file.

ReportID	Path	Type	English Report Text	Swedish Report Text
7	Cross table analyses	Report name	Cross table analyses	Cross table analyses
7	Cross table analyses / Cross table analyses	Report name	Cross table analyses	Cross table analyses
10	Documents	Report name	Documents	Documents
10	Documents / Documents	Report name	Documents	Documents
11	Form	Report name	Form	Form
11	Form / Form	Report name	Form	Form
5	Summary	Report name	Summary	Summary
5	Summary / Welcome	Report name	Welcome	Welcome
6	Trends	Report name	Trends	Trends
6	Trends / Trends	Report name	Trends	Trends
9	User management	Report name	User management	User management
9	User management / User management	Report name	User management	User management

Question / AnswerBlock / VariableSubset / Filter / **Reports** / Text boxes / Hierarchical filter / Storyteller objects / For

9.2.1.1 Variable Subsets

In the Variable subset sheet you can translate or update the Variable subset names. All available Variable subsets in the project are shown in the file.

The image below shows the Variable subset sheet.

Variable subsetID	English Report Text	Swedish Report Text
1	Company X	Företag X
2	Company Y	Företag Y
3	Company Z	Företag Z

9.2.1.2 Filters

In the Filter sheet you can translate or update the Filter names. All available Filters in the project are shown in the file.

The image below shows the Filter sheet.

FilterID	English Report Text	Swedish Report Text
1	Is the frequency of meetings sufficient?	Är mötesfrekvens tillräcklig?
2	Annually purchase sum?	Årlig inköpssumma
3	Customer class	Kundkategori
4	Year	År

9.2.1.3 Report

In the Report sheet you can translate or update the Report names, including the label of the "Change storyteller" button which is a part of the report navigation. The sheet contains all the top portal tabs and all existing sub-reports.

The image below shows the Report sheet. Column C indicates what type of label it is.

ReportID	Path	Type	English Report Text	Swedish Report Text
7	Cross table analyses	Report name	Cross table analyses	Cross table analyses
7	Cross table analyses / Cross table analyses	Report name	Cross table analyses	Cross table analyses
10	Documents	Report name	Documents	Documents
10	Documents / Documents	Report name	Documents	Documents
11	Form	Report name	Form	Form
11	Form / Form	Report name	Form	Form
5	Summary	Report name	Summary	Summary
5	Summary / Welcome	Report name	Welcome	Welcome
6	Trends	Change storyteller button	Change view	Change view
6	Trends	Report name	Trends	Trends
6	Trends / Trends	Report name	Trends	Trends
13	Trends / Trends / Monthly	Report name	Monthly	Monthly
12	Trends / Trends / Weekly	Report name	Weekly	Weekly
9	User management	Report name	User management	User management
9	User management / User management	Report name	User management	User management

<u>Note:</u> The "Change storyteller" option is only shown in the Excel file when it is used. That is based on the following criteria: the report will have sub-reports and "tabbed nodes" will not be used.

9.2.1.4 Text Boxes

In the Text boxes sheet you can translate or update the text and tooltips in the Text boxes of the Storyteller and the Form reports. As shown in the image below, columns A-C indicate were the text box is located in the portal. In column E you will see if it is the text or the tooltip.

The image below shows the Text box sheet.

Path	Report	Report type	Text box ID	Text type	Master Language Report Text
Dashboard / Welcome	Welcome	Storyteller	4	Text	Top of mind - Last 1 month
Dashboard / Welcome	Welcome	Storyteller	4	Tooltip - Hover	Brand awareness last 1 month for Dapresy telecom and key competitors in Sweden
Dashboard / Welcome	Welcome	Storyteller	5	Text	In mind - Last 1 month

Question / AnswerBlock / Filter / Reports / Text boxes

<u>NOTE: If parts of a text, in a Text box, are styled differently, then the style will be lost during the upload of the Excel file as the style of the first character is applied to the uploaded text.</u>

<u>Example: If you are using a text like the one in the example image below, then the "X" will lose the bold style during the Excel download/upload process as the style of the first character is applied to the whole text.</u>

The image below shows a text box with more than one style. If the text box is updated via the Excel process, then the "X" will lose the bold style.

NPS, segment **X**

9.2.1.5 Optional Filter Headers

In the Optional filter sheet you can translate or update the headers of all used optional filter items in the Storytellers (Variable subsets, Floating time periods, Intervals and Moving average).

The image below shows the Hierarchical filter sheet. In column D you can see what type of header it is.

ReportID	Path	Report	Item	English Report Text	Swedish Report Text
5	Summary / Welcome	Welcome	Floating time period	Floating time period	Floating time period
5	Summary / Welcome	Welcome	Moving average	Moving Average	Moving Average
5	Summary / Welcome	Welcome	Interval	Interval	Interval
6	Trends / Trends	Trends	Floating time period	Floating time period	Floating time period
6	Trends / Trends	Trends	Moving average	Moving Average	Moving Average
6	Trends / Trends	Trends	Interval	Interval	Interval

Question / AnswerBlock / VariableSubset / Filter / Reports / **Optional Filters** / Text boxes / Hierarchical filter / Storyteller objects

9.2.1.6 Hierarchical Filter

In the Hierarchical filter sheet you can translate or update the Hierarchical filter header in the Storyteller, Form, Cross table tool and the Document archive 2.0.

The sheet contains all the top portal tabs and all existing sub-reports.

The image below shows the Hierarchical filter sheet.

ReportID	Path	Report	Report type	English Report Text	Swedish Report Text
6	Trends / Trends	Trends	Storyteller	Hierarchical Filter	Hierarchical Filter
7	Cross table analyses / Cross table analyses	Cross table analyses	Cross Table tool 2.0	Hierarchical Filter	Hierarchical Filter
9	User management / User management	User management	Report User management	Hierarchical Filter	Hierarchical Filter
10	Documents / Documents	Documents	Document Archive 2.0	Hierarchical Filter	Hierarchical Filter

9.2.1.7 Storyteller Objects

In the Storyteller objects sheet you can translate or update the labels defined in the charts, tables, and in the Respondent table. The list below shows which labels can be defined in respective objects and all those that are supported in the translation process.

Charts:

- Hide series with low base information text
- Warn for series with low base information text
- Hide series with low respondent count/result information text
- X-Axis information text
- Y-Axis information text

- Unit
- Mean value series labels
- Show top/bottom value per axis group
- Percentile labels

Tables:

- Hide series with low base information text
- Warn for series with low base information text
- Hide series with low respondent count/result information text
- Unit
- Mean value series label
- Base size

Respondent tables

- Links to Form reports
- Custom title text

The Storyteller objects sheet looks like the image below. In column A-B you can see where you can find the object and the type is shown in column D. In column E you can see if the label is located in the main series or in any additional series. In column F you can see what type of label it is.

Path	Report	ObjectID	Object type	Series	Label	Master Language Report Text
Dashboard / Dashboard	Dashboard	2	Chart	Main series	Warn for series with low base information text	Low base size
Dashboard / Dashboard	Dashboard	2	Chart	Main series	X - Axis text	Percentage value
Dashboard / Dashboard	Dashboard	7	Respondent Table		Custom title - Prepaid or Postpaid	Prepaid or Postpaid
Dashboard / Dashboard	Dashboard	7	Respondent Table		Custom title - Age group	Age group
Dashboard / Dashboard	Dashboard	7	Respondent Table		Custom title - Gender	Gender
Dashboard / Dashboard	Dashboard	7	Respondent Table		Custom title - Household Income	Household Income
Dashboard / Dashboard	Dashboard	7	Respondent Table		Link to Forms - Column Header - Link 1	View questionnaire
Dashboard / Dashboard	Dashboard	7	Respondent Table		Link to Forms - Linking button label - Link 1	View
Dashboard / Dashboard	Dashboard	8	Chart	Main series	X - Axis text	Percentage value
Dashboard / Dashboard	Dashboard	8	Chart	Main series	Warn for series with low base information text	Low base size
Dashboard / Dashboard	Dashboard	9	Table	Main series	Mean value series label	Average value of last 4 weeks

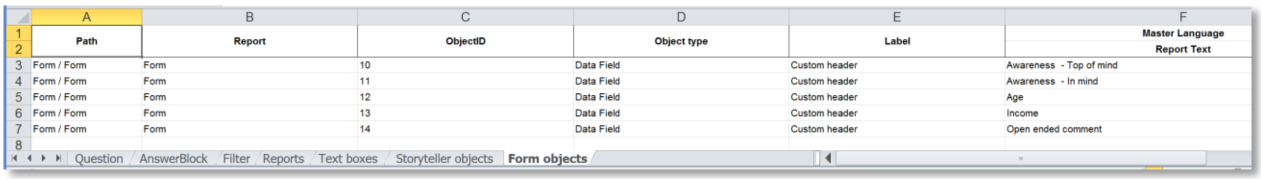
Question / AnswerBlock / Filter / Reports / Text boxes / **Storyteller objects**

Note: Only the objects having any of the mentioned labels above will be included in the exported Excel file, so the Excel file will not show all objects in the project.

9.2.1.8 Form Objects

In the Form objects sheet you can translate or update the labels defined in the Date fields and Icon/Shapes in the Form reports.

The image below shows the Excel file.



Path	Report	ObjectID	Object type	Label	Master Language Report Text
Form / Form	Form	10	Data Field	Custom header	Awareness - Top of mind
Form / Form	Form	11	Data Field	Custom header	Awareness - In mind
Form / Form	Form	12	Data Field	Custom header	Age
Form / Form	Form	13	Data Field	Custom header	Income
Form / Form	Form	14	Data Field	Custom header	Open ended comment

Question / AnswerBlock / Filter / Reports / Text boxes / Storyteller objects / Form objects

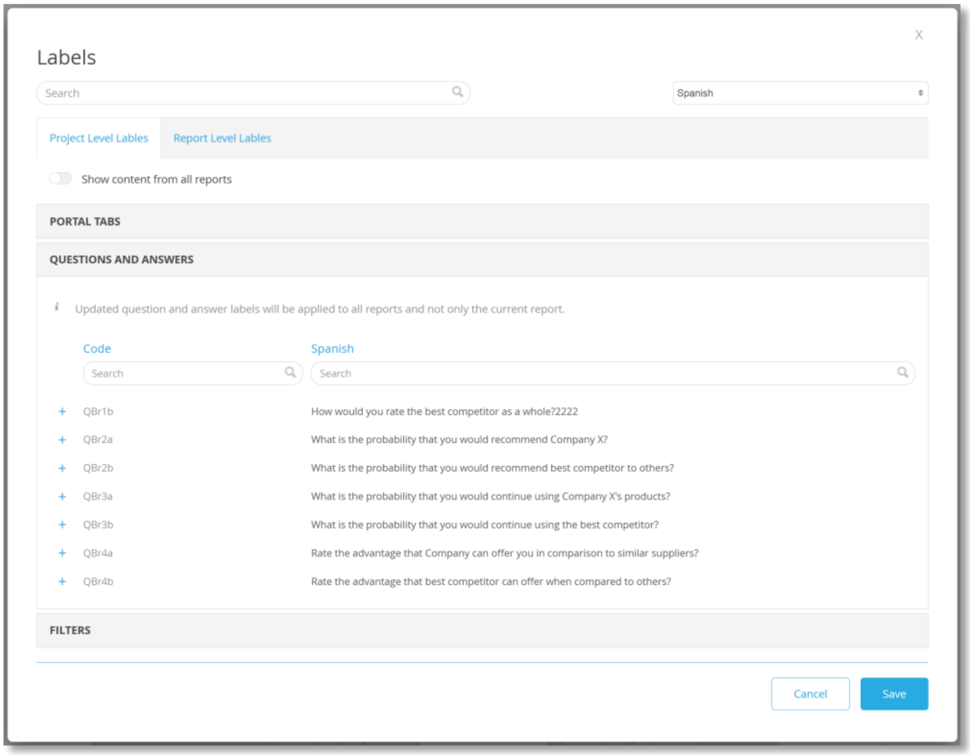
Note: Only the Data Fields with a custom header will be included in the exported Excel file, so the Excel file will not show all the Data fields.

9.2.2 Translations and Text Updates via the Label Panel

The Label panel is located in the Storyteller and in the Form. The purpose of the Label panel is to bulk update labels/translate labels in an efficient way. You can update all the project specific labels such as the report names, filter names, text boxes, labels in charts, etc. for one or multiple languages at the same time.

The image below shows how to enter the Label panel from a Storyteller and a Form report.

The image below shows the Label panel.



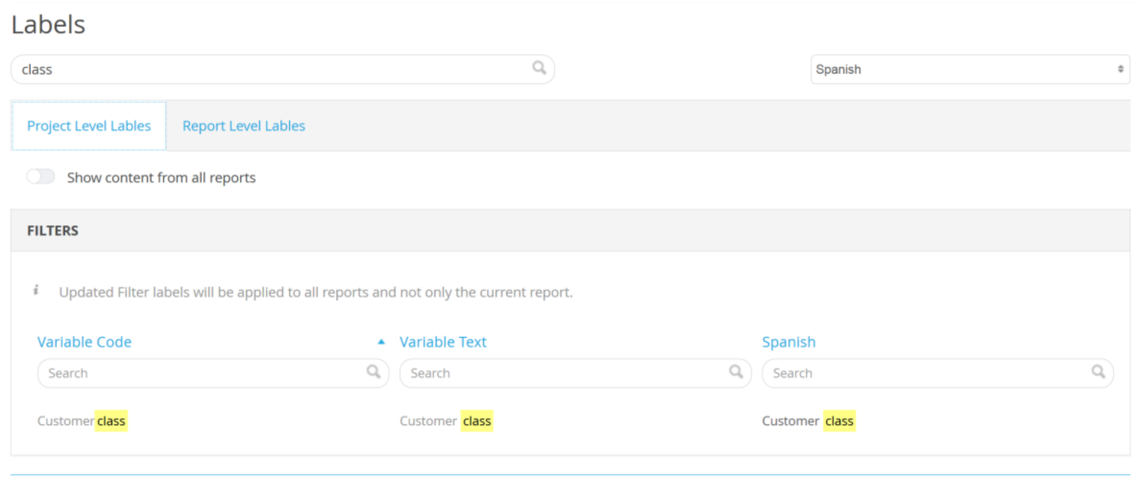
As shown above, the Label panel is divided into two top tabs:

- **Project level labels:** Includes all labels that are shared between all reports in the project like portal names, filter names, variable subset names, etc.
- **Report specific labels:** Includes labels from the current report like text boxes and optional filter headers, etc.

The Report specific tab only shows content from the current report. By default, the Project level tab shows content from only the current report, but you can select to show all items by using the filter option “Show content from all reports”.

You can also use the search function at the top of the page. This will search both tabs and all panels.

The image below shows the result of a search. The text “Class” was only found in the questions and answer panel and in the Text object panel. Only these two are shown as a result of the search.



9.2.3 NOTE: Translations Via Regular Setup Interfaces

The following logic is used when working in the report setup of a Storyteller and Form in a project with multiple languages.

Create New Object: The text is saved into all languages

When you create a new object (text box, chart, sub-report etc.), the entered text/label will be saved into all languages rather than only the selected language. All languages must have a label.

Edit an Existing Object: The text is saved into the selected language

The labels/texts you edit will always be saved into the selected language.

Example: A project contains English and Swedish. If English is selected, then all the edited labels will be saved into the English version. If you then change the language to Swedish, then all edited labels will be saved into the Swedish version.

Edit an Existing Object: Exception when the main language and additional language uses identical texts

When the text of the main language and the text of an additional language are identical, then both texts will be updated if the Administrator updates the text in the main language.

Example: A project contains the languages English and Swedish. English is the main language.

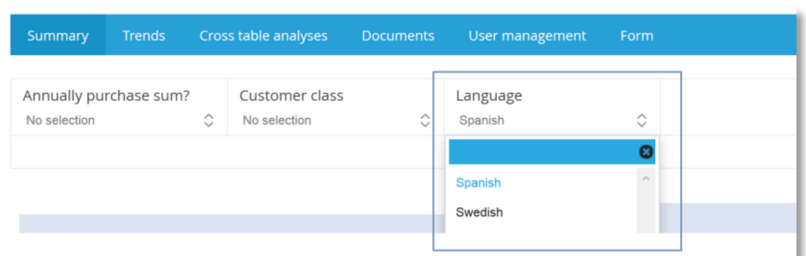
- English is the selected language

- A new text box is added, and the text “Brand awareness” is entered. The text is saved into both English and Swedish automatically as it is a new object
- The Administartor enters the text box again to update the text to ”Brand awaress - Top of mind” (English is still the selected language)
- As the Swedish version of the text was identcial with the text in the main language (English), then the Swedish version is updated to. The label is now “Brand awaress - Top of mind” in both languages
- The Administrator changes the language to Swedish
- The Administartor enters the text box again and updates the label to the real Swedish version “Varumärkeskännedom top of mind.” Only the Swedish version will be updated since Swedish is not the main language.
- The Administartor changes the main language to English to update the text again, now the English version will only be updated, not the Swedish version as the texts are not identical.

9.3 New Language Selection Layout

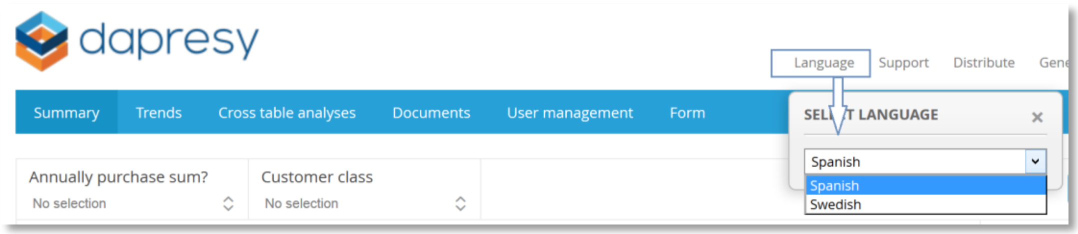
In projects with multiple languages, the report users previously selected the language in different places in different report types. For example, in the Storyteller, the language selection was placed in the Optional Filter area, as shown in the image below.

The image below shows the old language selection in a Storyteller.



To make the portals more user-friendly, the language selection is now made in the top right corner of the page. The language selection link is located in the same position no matter what type of report is selected. See an example below.

The image below shows the new language selection link.



Note: The new language selection layout is only applied to newly created projects. Existing projects still use the previous layout. If you want to use the new layout in an old project, you can go to the Project settings page and enable the new layout, as shown in the image below.

The image below shows the Project settings page and the option to use the new layout in an old project.

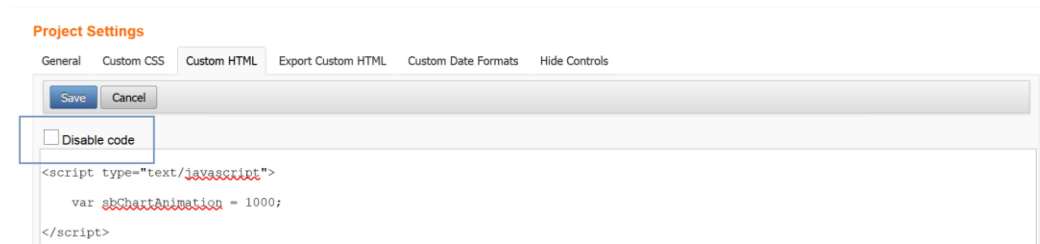
10 - Other updates

10.1 Turn custom HTML/CSS on and off

There is a new option to turn off the custom code that has been added in the Project settings page. This makes it much easier to “remove” the custom code if you want to test the report without your custom code.

The new setting works for Custom CSS, Custom HTML and Export Custom HTML sheet. As soon the new option is selected, the custom code will be ignored when you look at the report.

In the image below, you can see the new option. Note that you have to refresh the Preview window (or close the window and open it again) after the custom code has been turned off/on to apply the change.



Note: If you have custom code in your projects and the reports act strangely, then you should always try turning off the custom code before contacting the support team. If your report works fine when the custom code is turned off, then the issue is related to your code and not the system.