Dapresy Pro 2018

August Release

Index

1 - Introduction

This document describes new and improved features in the Dapresy Pro 2018 August Release.

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

Best Regards,

Dapresy Team

Email: support@dapresy.com

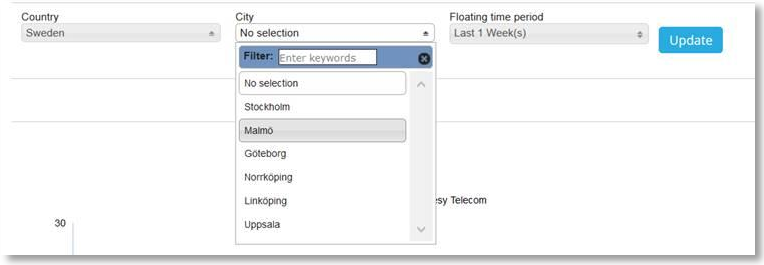
2 - Overview

The Dapresy Pro 2018 August update contains lots of improvements to help you, here is a summary:

Dynamic filters (also known as associated filters)

- The new Dynamic filter logic is a significant improvement to the functionality of Dapresy Pro's Storyteller. It will now be much easier to understand relationships between filter combinations. Filtering that would previously result in "no data" will be prevented. Dynamic Filters are also, in some systems, named Data driven filters or Associated Filters.

  The general principle will be familiar from many e-commerce sites with large catalogues organized in hierarchical categories. Below we see a very basic example of the Dynamic filter functionality, In this example, the variables Country and City are applied as standard filters, not hierarchical filters. When the user selects "Sweden" in the Country filter the City filter is updated so only Swedish cities are available in the city list.



Ability to select Date variable in Optional filters

- It is now possible to let the report users select which Date variable to be the use for the time period filtering in a Storyteller report. This new logic is perfect for projects with multiple date based variables, like for example in a customer experience project which could contain both a response date and a purchase date. By letting the Report users select which date variable to be the base in the time period filtering it will be possible to analyze the result connected to specific dates or occasions.

Excel export of individual Storyteller objects to Excel

- The result of a single chart and a table in a Storyteller report can now be exported into an Excel table. The exports are made per object which makes it very efficient and easy to access the result from charts as well as tables for further analyses and presentation outside Dapresy Pro.

Improved Moving average logic

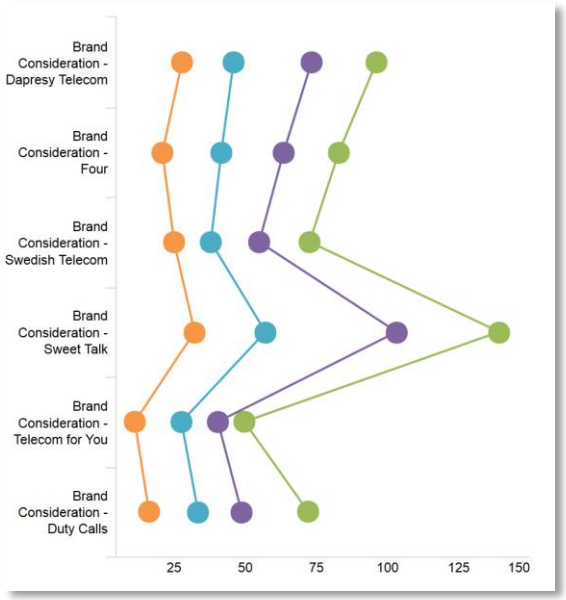
- Up until this release, when applying a 4-week moving average calculation, the initial 3 weeks of data are hidden, as the first data point shown in the chart/table will be the first week which can be based on 4 weeks data. Whilst this is correct from a statistician's point of view, it might not be so easy to understand from the perspective of an average user. A new option now makes it possible to also display these incomplete initial weeks (week 1-3 in this example) which were hidden before.

Ability to choose weight variable in Dynamic icons

- In the Dynamic Icon object, in the Storyteller, we now support selecting which weight variable to be used in the calculation in case of having multiple weight variables defined in the project.

Ability to set marker size in line and spline charts

- The marker size in line and spline charts can now be adjusted which improves the opportunities to create great looking charts.



New search option in Respondent Tables

- In the Respondent table you can now have both a global search field, which searches in all columns, and one search field per column. This new logic makes it easier to search for relevant data.

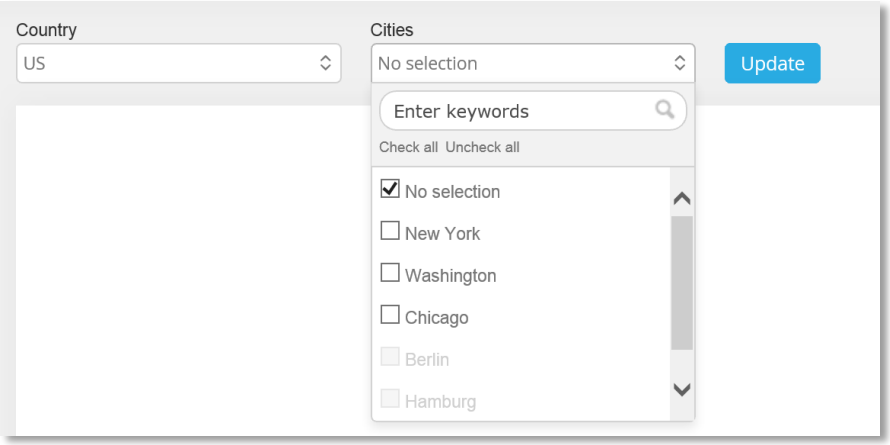
Updated layout in Dapresy standard Login and Project selection pages

- The layout of the Dapresy standard Login page and Project selection page have been updated to a new airy and light feel (if you use your own branding in both these pages they will look like before and are not affected by this layout update).

3 Dynamic filters

The new Dynamic filter logic is a significant improvement to the functionality of Dapresy Pro's Storyteller. It will now be much easier to understand relationships between filter combinations. Filtering that would previously result in "no data" will be prevented. Dynamic Filters are also, in some systems, named Data driven filters or Associated Filters.

The general principle will be familiar from many e-commerce sites with large catalogues organized in hierarchical categories. Below we see a very basic example of the Dynamic filter functionality, in this example, the variables Country and City are applied as standard filters, not hierarchical filters. When the user selects "US" in the Country filter the City filter is updated so only US cities are available in the city list.



The Dynamic filtering is purely based on the data in the project so no relations between filter options needs to be predefined.

Below you see a summary of the Dynamic filter support and in next chapter you see how to setup the Dynamic filtering. Chapter 3.2 described the filtering logic.

Setting per Filter

The Dynamic filter function is an optional setting, off by default and it is set per filter.

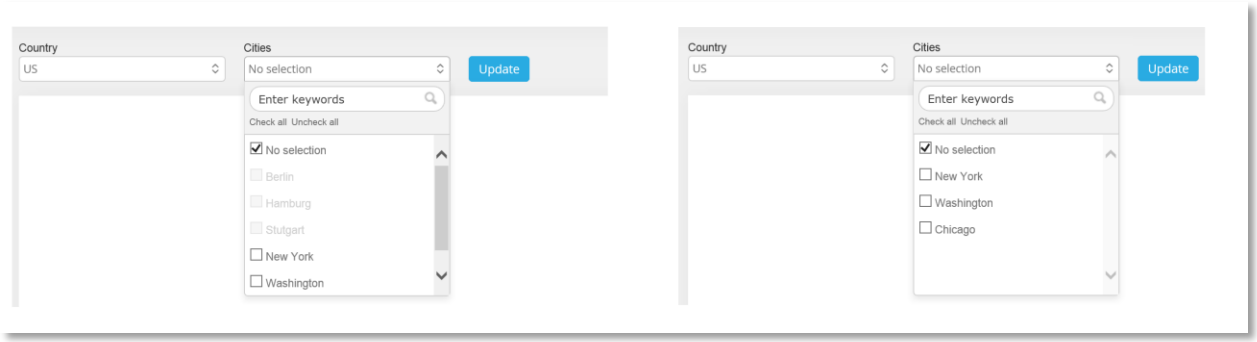
It is necessary to support turning the Dynamic Filtering logic on/off per filter, instead of per report, to support projects which contain multi data sources. As an example: Storyteller could have ten filters while nine of those are connected to the survey data and the tenth one belongs to a second data source, like for example, Media investments. In this use case all filters cannot be dynamic as there no respondents that have data present in all the filters. In a case like this care must be taken to apply the dynamic filtering to the survey data filters and not to the media investment filter.

Hide or disable non-selectable options

When non-selectable options appear due to the applied filters, i.e. items with no respondents because of the filtering, the items can be removed (hidden) from the list or they can display with a greyed out, disabled style.

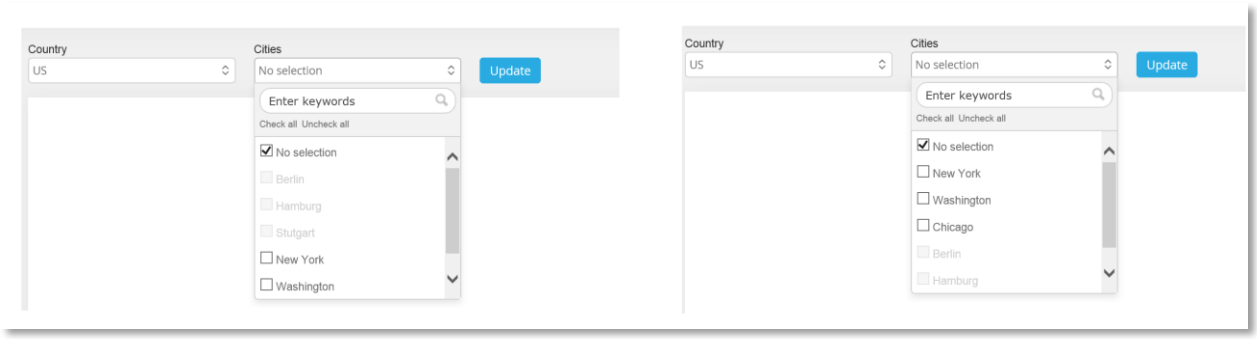
Here we see two examples. The Country list contains Germany and US but only US is selected so all German cities are no longer selectable.

To the left you see that the German cities are disabled and to right you see that the German cities are hidden.



In case of disabling the non-selectable options, you can also choose if the disabled options will be moved to the bottom of the filter list or if they should keep the original position.

Here we see the difference between the two sorting options that can be used. Either the current sort order is kept (the example to the left) or all the disabled options are moved to the bottom of the list (the example to the right).



Supported in Hierarchical filters, Optional Filters and Time period filtering

The Dynamic filtering can be applied to the items listed below.

- Hierarchical filter

- Regular filters
- Time period filters

It is not currently supported to apply dynamic filters to Variable subsets. They are not filtering the respondent data, the Variable Subsets are effectively only hiding questions and answers.

Supported with in-memory options only

The Dynamic filtering logic is only supported when the "In-memory data model" is used due to the need for high performance. This means that Filters based on Input variables will not support Dynamic filtering as Input variables are not yet stored in the in-memory data model.

Note: support for storing Input variables in in-memory is in development and will be released end of 2018/beginning 2019

3.1 Setup

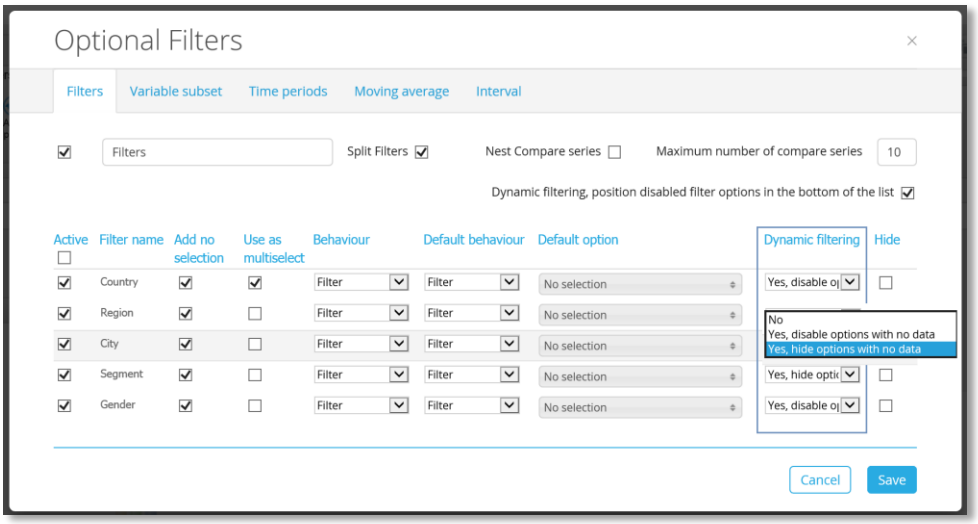
The Dynamic filtering logic is not applied by default, it needs to be turned on by the Administrator during the report setup per filter. The controls for applying the Dynamic filtering logic are located in the following three screens (see more information in next chapters).

- Optional filters
- Time periods
- Hierarchical filters

3.1.1 Optional Filters

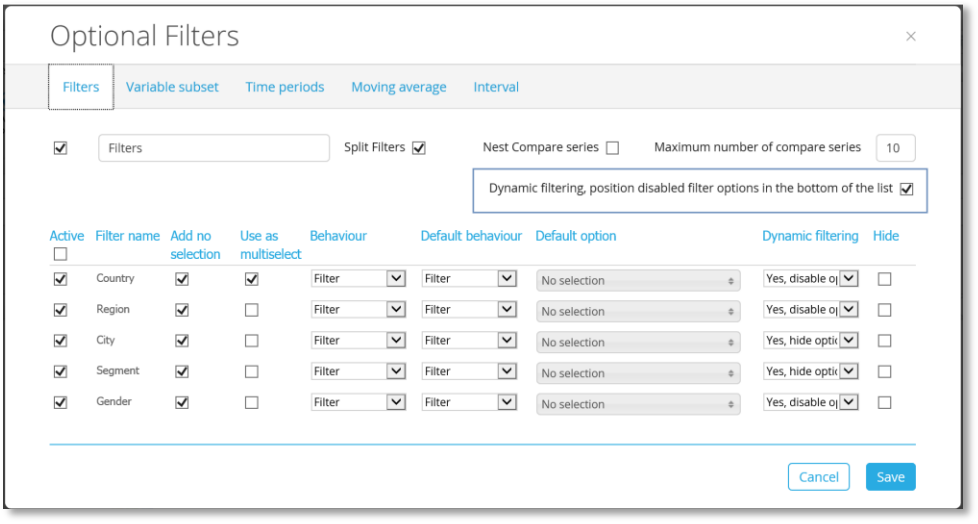
To apply the Dynamic filtering logic to your Optional Filters make the appropriate setting in the Dynamic Filter columns as shown in the image below. By default dynamic filtering is not used, the administrator chooses which filters it will be applied to and if the non-selectable filter options should be hidden or disabled.

Here we see the new controls for turning the Dynamic filter logic on and off per filter.



In the top of the page you can also define if the disabled options shall keep the orginal sort order or if these shall be moved to the bottom of the page.

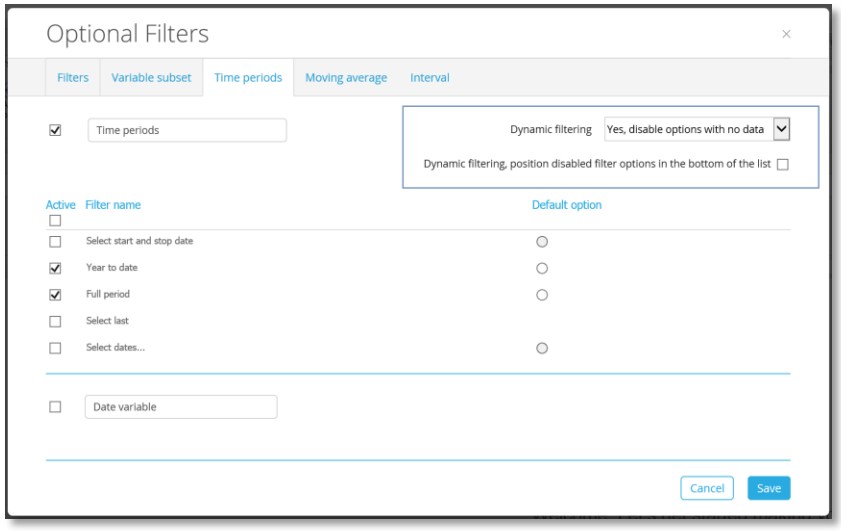
Below you see the control for selecting the sort order of disabled options. This control is only present when at least one of the filters are set to "Yes, disable options with no data".



3.1.2 Time periods

Below you see the new controls for applying the Dynamic filter logic to the Time periods. The logic and settings are the same as described in chapter 3.1.1.

Here we see the new Dynamic filter controls in the Time period setup.

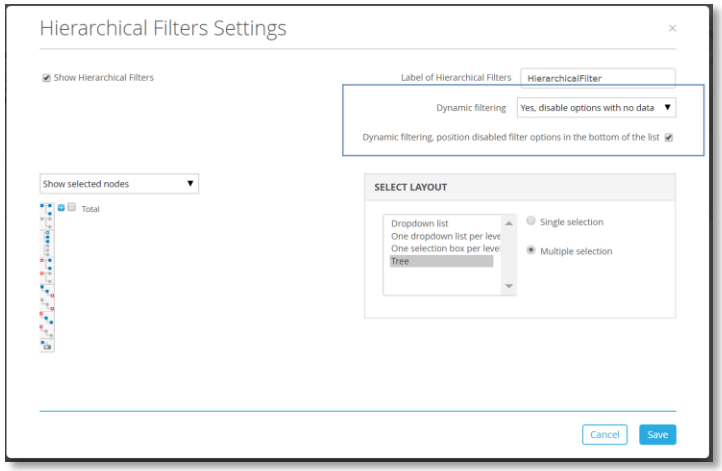


Note: If the user can select start and stop date in a calendar control the calendar control option will always be displayed and it will never become hidden/disabled, as it must be possible to amend the time selection, though the selected start and stop date in the calendar control will filter the other dynamic filters.

3.1.3 Hierarchical filters

Below you see the new controls for applying the Dynamic filter logic to the Hierarchical Filters. The logic and settings are the same as described in chapter 3.1.1.

Here we see the new Dynamic filter controls in the Hierarchical filter setup.

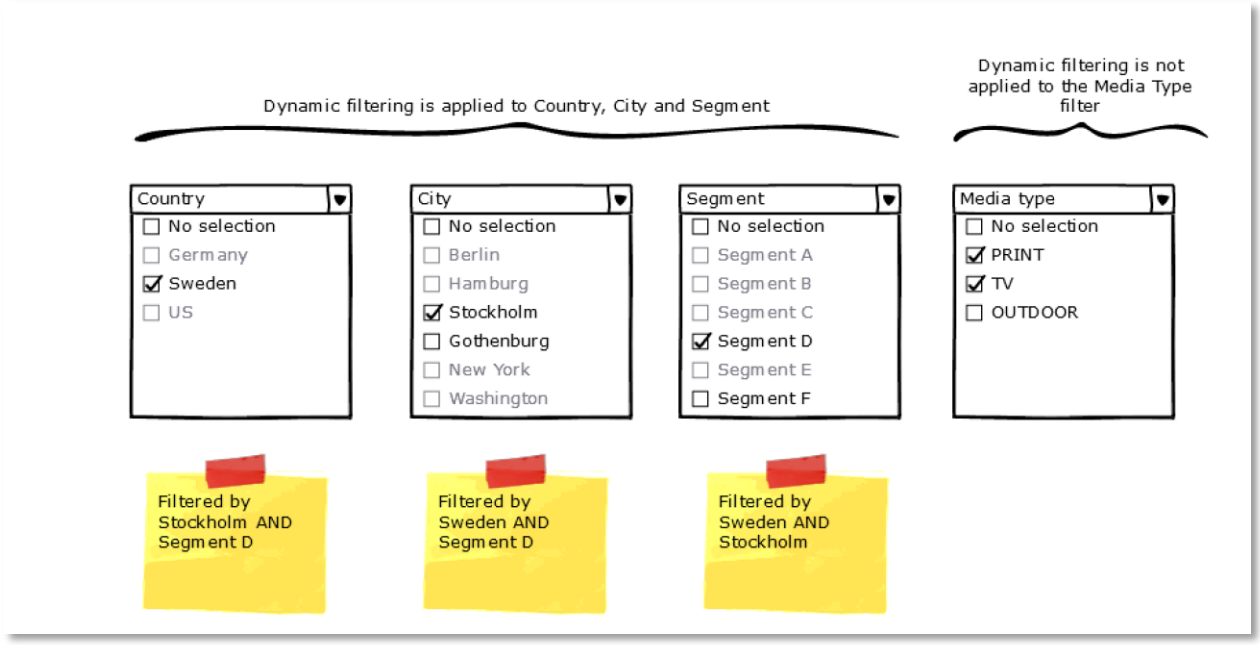


Note: The Dynamic filtering is in this first version not supported if the selected layout type is “One selection box per level”, it is only supported when the layout type is either “Tree”, “Dropdown list” and “One dropdown list per level”.

3.2 Filtering logic

The logic used to determine which filter items that will be hidden/disabled is based on the selections in all other dynamic filters. The sketch below explains the used logic.

Here we see an example of how the Dynamic filtering logic works. In this example Country, City and Segment filters have been set to use the Dynamic filtering logic, the Media type filter is not using the Dynamic filter logic.



Note: a selected filter that becomes disabled due to a selection in another filter will be shown in disabled (or hidden) but still selected style so when the filter options are enabled again (due to a selection in another filter) it will be selected by default, as it was before it was disabled or hidden.

3.3 Performance

The performance of the Dynamic Filtering function, the time it takes to calculate available filter options and hide/disable those, are affected by both the data volume and the number of filters options. The total number of filter options has the biggest impact on the performance while the data volume is less critical. For best performance use fewer filters and avoid having filters with large numbers of options.

The end-user's browser, hardware and internet connection bandwidth and latency will also be a factor in the perceived speed of dynamic filter performance.

3.4 Dynamic Filters vs Hierarchical filter - what is the difference?

The Dynamic filter logic can in many use cases be used instead of the Hierarchical filter logic as the setup is much easier as no relations between variables needs to be setup.

The pros of using the Dynamic filtering instead of a Hierarchical filter is the much-improved flexibility as the Dynamic filtering filters the content in "all directions" while the Hierarchical filter requires the data to be organized in a tree structure.
If you for example have two variables, Country and Segment, and you create a Hierarchical filter the reporting will use a structure as in the first image below. With this structure it is hard to get the result for Segment A in all countries: you have to select all Segment A nodes in every relevant branch of the tree structure, which will be time consuming if you have a lot of countries.
If you instead use the Dynamic filtering logic you will have two separated filter lists, see second mage below, and to get the result for Segment A you select Segment A in the Segment list and "No selection" in the country list.

Image 1, shows the Hierarchical structure

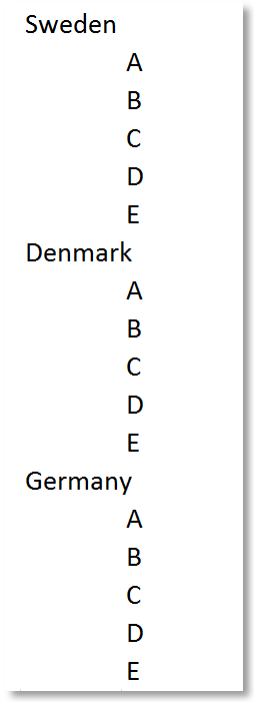
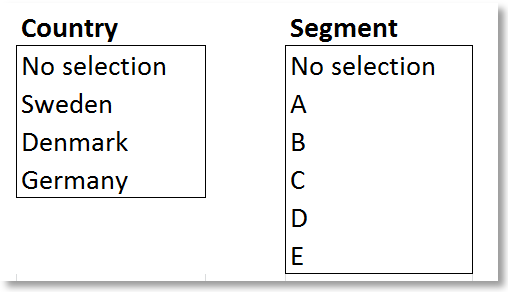


Image 2, shows a setup with Dynamic filters



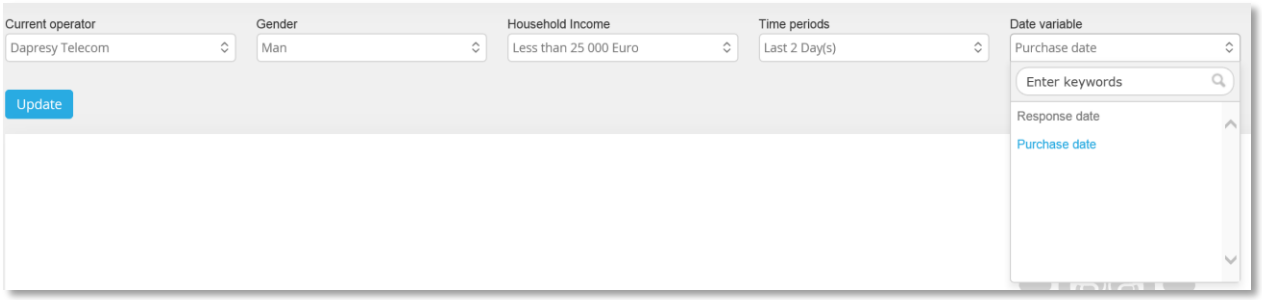
Automatic benchmarking is not available with dynamic filtering. When using the Hierarchical filter, it is possible to compare the result of the selected unit to the result of the level above, the other units in the same level, the top unit, and so forth, because there is no explicit hierarchy this logic is not available when using Dynamic filtering

4 Ability to select date variables in Optional Filters

The new ability to let the Report users select which Date variable to be the base in the time period filtering in a Storyteller report is great to use in projects with multiple dates per respondent, like for example in a customer experience projects which could contain both a response date and a purchase date. By letting the Report users select which date variable to be the base in the time period filtering it will be easier to analyze result connected to specific dates or occasions.

The Date variable selection is made in the Optional filter area in same way as other optional filters are selected.

Here we see an example where the Report user can select if the dashboard, that shows data for last 1 week, shall be filtered by the Interview date or by the Purchase date.



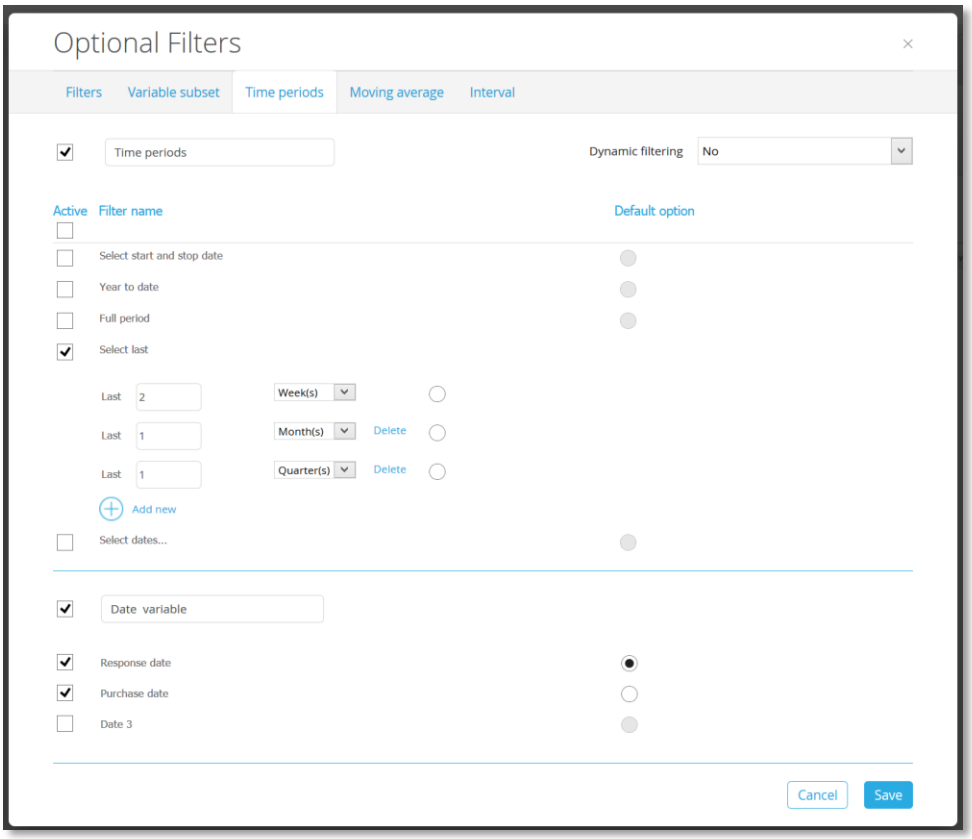
4.1 Setup

To add the ability for the Report users to select which Date variable to be used in the time period filtering do as the following:

- Enter the optional Filter setup and in the Time period tab
- Enable the Time period option and select the time periods to be available
- Enable the Date variables option and select which date variables that shall be available, you also have to select which one to be default selected.

Note: As stated above you can only activate the ability to select Date variables if the Time period selections is activated, it is not possible to let the users select Date variable if they cannot select Time period.

Here we see the Optional Filter window and the Time period tab, the new controls for setting up the Date variable selection is located in the bottom of the page.

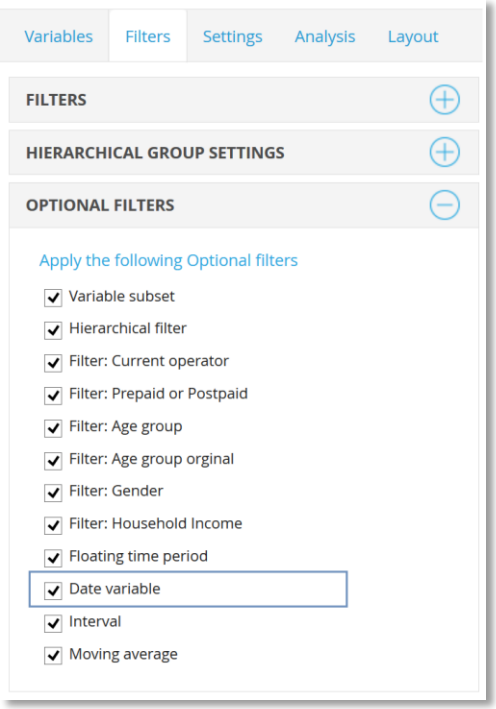


4.2 Logic

When activating the ability to select Date variable the selected date variable will override the Date variable that has been selected per object.

In case of having an object that always shall be filtered by a certain Date variable even if the Report users have the ability to select Date variable you can exclude the Date variable filter from this object in the same way as any other optional filter can be excluded from an object.

Here we see how to exclude optional filters from an object, as shown the new Date variable filter is present in the list of available optional filters to exclude.

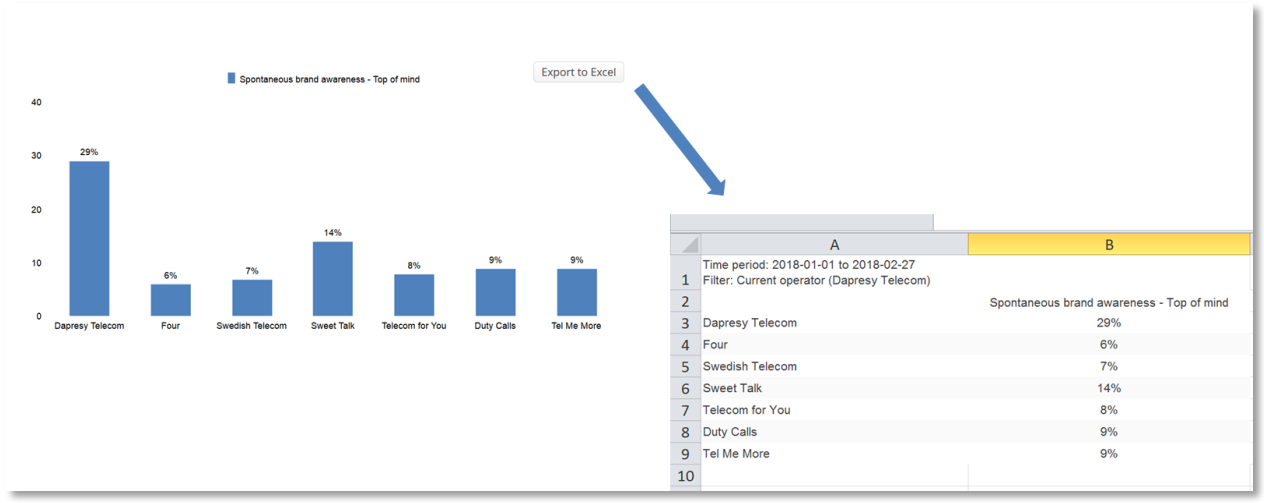

Variables
Filters
Settings
Analysis
Layout
FILTERS
HIERARCHICAL GROUP SETTINGS
OPTIONAL FILTERS
Apply the following Optional filters
Variable subset
Hierarchical filter
Filter: Current operator
Filter: Prepaid or Postpaid
Filter: Age group
Filter: Age group orginal
Filter: Gender
Filter: Household Income
Floating time period
Date variable
Interval
Moving average

5 Excel export of individual Storyteller objects to Excel

The result from a single Storyteller chart and table can now be exported into an Excel table in a similar way as the result of a Respondent table can be exported to Excel.

When then new function is turned on an “export” button appears in top right corner of the chart/table when the user hovers over the object as shown in the image below.

Here we see the new export button for exporting the result of chart or a table to Excel.



Note 1: the result is always exported as a table, you don’t get a native Excel chart when exporting a chart.

Note 2: The table layout will be the same as online when exporting a table. When exporting a chart a neutral layout is used (the one shown in the image above).

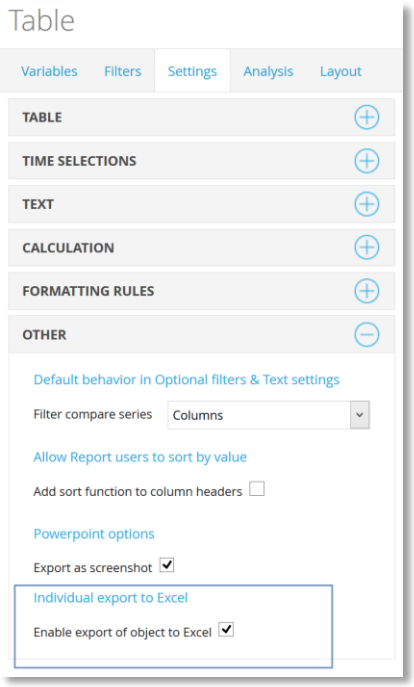
Note 3: the values in the chart are formatted as “numbers” as long as all value cells in the table can be formatted as numbers. If a cell cannot be formatted as a number, which can be the case when for example a cell shows both the actual value and a benchmark value, the values cells in the table will be formatted as text.

5.1 Setup

The new Excel export is supported in charts, tables and in dynamic images. It is an object level setting so the ability to make these exports is defined per object, the option is off by default (it is an object level setting as in most of the projects it will not be sufficient to use it in all reports and especially not in infographic inspired slides where multiple objects might be positioned on top of each other).

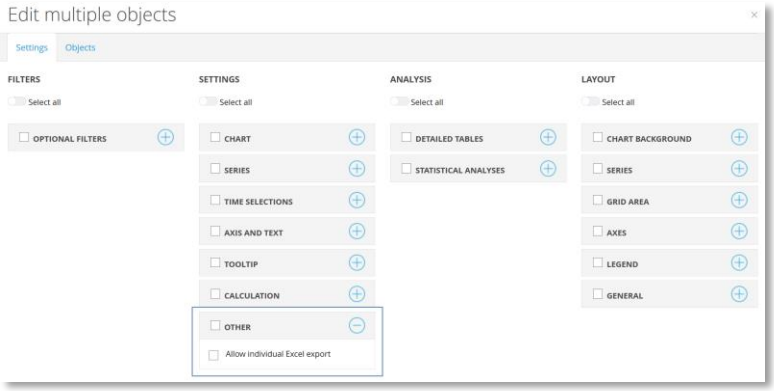
The control for turning the export option on and off is located in the “Settings” tab in the “Other” panel as shown in the image below.

Here we see the control for turning the new Excel export option on and off.



The option is also available in the bulk update process of charts which makes it easy to turn the export function on/off for all charts (or some of the charts) in a project.

Here we see the same setting in the bulk edit screen.



6 Improved Moving Average logic

The Moving average functionality has been improved so now you can select if the initial incomplete intervals shall be displayed or not.

Both the new and the previous logic is described in the image below. The default logic is to hide the initial incomplete periods which means that all charts and tables behave like before by default.

Here we see an explanation of the new and previous moving average logic for the initial incomplete weeks.

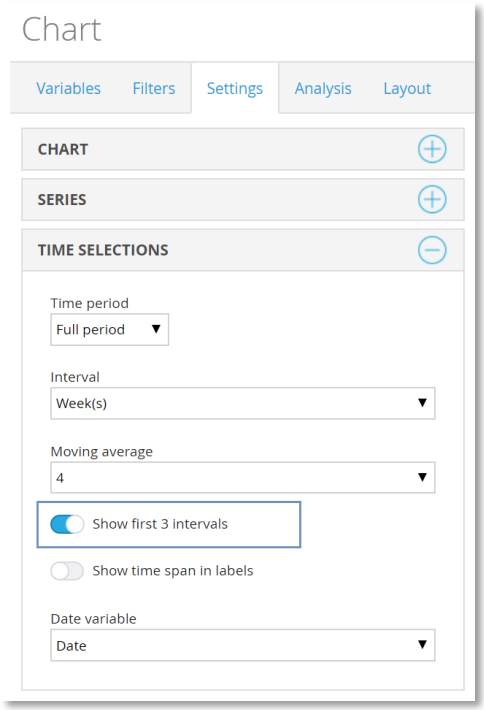
No moving average applied

Weeks displayed in chart/table:	Week 12	Week 13	Week 14	Week 15	Week 16	Week 17	Week 18	Week 19	Week 20
4 weeks moving average applied - previous (and default) logic:									
Weeks displayed in chart/table :				Week 15	Week 16	Week 17	Week 18	Week 19	Week 20
Weeks included in moving average calculation:				*W12-15*	*W13-16*	*W14-17*	*W15-18*	*W16-19*	*W17-20*
4 weeks moving average applied - new (optional) logic:									
Weeks displayed in chart/table :	Week 12	Week 13	Week 14	Week 15	Week 16	Week 17	Week 18	Week 19	Week 20
Weeks included in moving average calculation:	*W12*	*W12-13*	*W12-14*	*W12-15*	*W13-16*	*W14-17*	*W15-18*	*W16-19*	*W17-20*

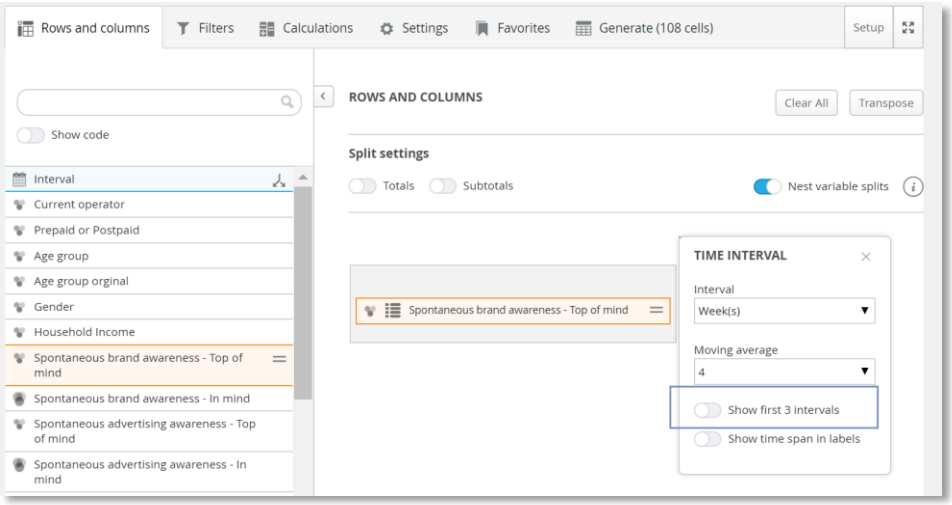
6.1 Setup

The option for selecting behaviors is a new control positioned next to the existing Moving average controls as you see in the image below. When the new control is disabled (which is the default setting) the initial incomplete periods becomes hidden. If the new control is enabled the incomplete periods are displayed.

Here we see the new setting in the setup of a Storyteller chart.

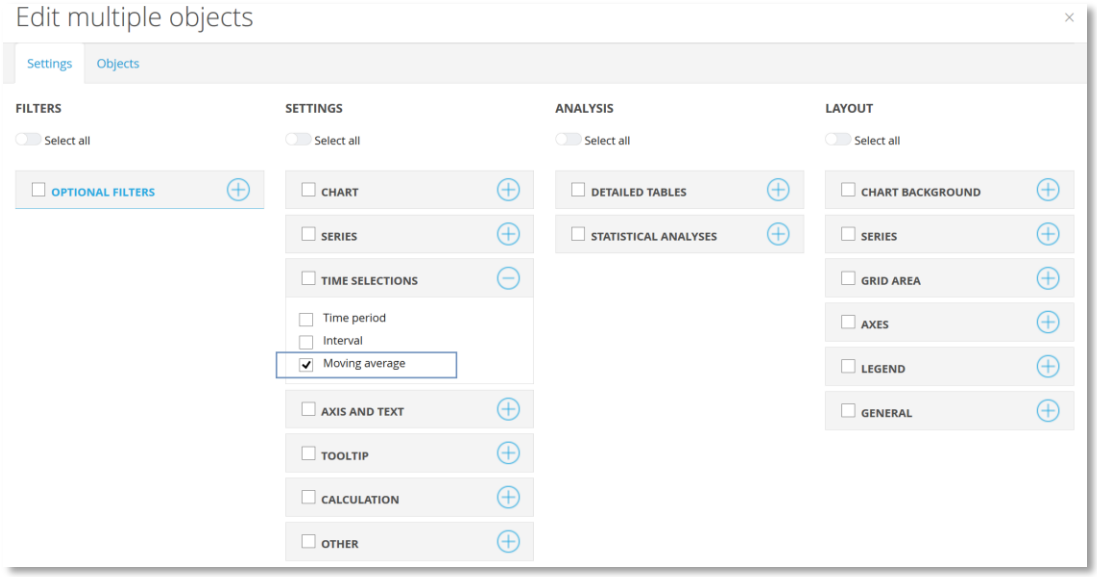


Here we see the new setting in the Cross table tool.



When you bulk update charts the new setting for showing the initial incomplete periods or not is included in the “Moving average” option. When this option is ticked (see the image below) all the moving average settings, including this new setting, are being considered and updated.

Here we see the bulk edit window for charts, if Moving average is ticked the new option will be considered and bulk updated in the selected charts.



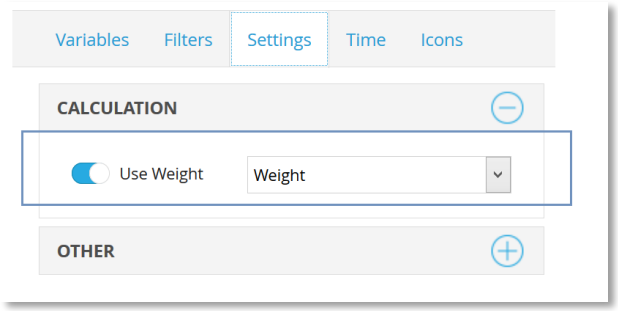
7 Ability to choose weight variable in Dynamic icons

If your project have more than one weight variable you can now, in the Dynamic filter object, select which weight variable to be used in the calculation (previously was always the default weight variable used in the calculation).

7.1 Setup

The weight variable selection works in the same way as selecting weight variable in for example a chart or a table. The setting is located in the Settings tab in the Calculation panel.

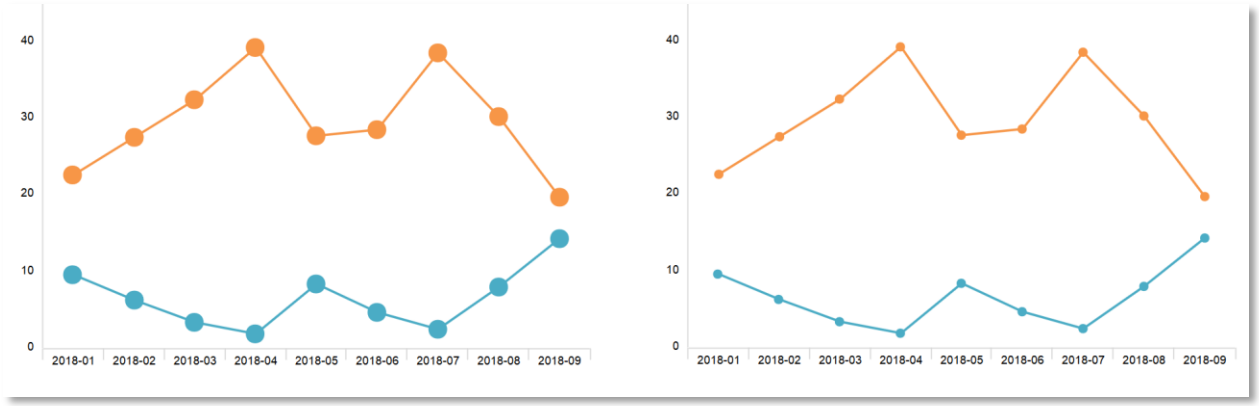
Here we see the controls for selecting weight variable in the Dynamic image object.



8 Ability to set marker size in line and spline charts

The marker size in line and spline charts can now be adjusted which increase the abilities to create good designed charts. Previously the "radius" of the markers where 4 pixels but now you can select to use a radius from 1 pixel up to 50 pixels.

Here we see an example of different marker sizes, to the right the marker radius is set to 4 pixels and to the left the marker radius is set to 8 pixels. The size of the markers is 4 pixels by default.



8.1 Setup

The control for setting the marker size is located in the Layout tab in the Series panel as shown in the image below. The controls are only displayed when the selected chart type is a line or a spline chart (vertical or horizontal).

Here we see the new control for changing marker size in line chart.

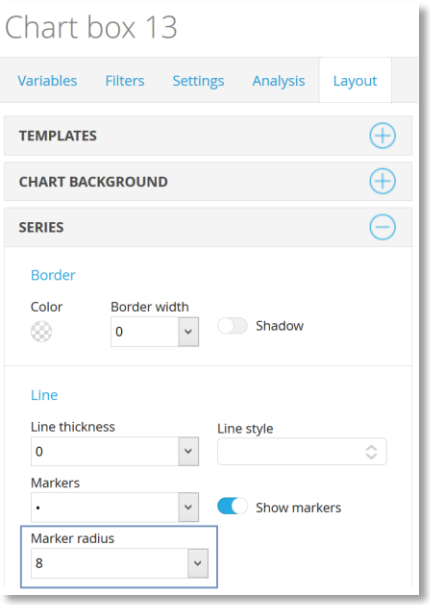


Chart box 13
Variables
Filters
Settings
Analysis
Layout
TEMPLATES
CHART BACKGROUND
SERIES
Border
Color
Border width
0
Shadow
Line
Line thickness
0
Line style
Markers
•
Show markers
Marker radius
8

9 New search option in Respondent Tables

In the Respondent Table you can now both have a global search field for the complete table and one search field per column which makes it easier to find relevant data in the Respondent tables.

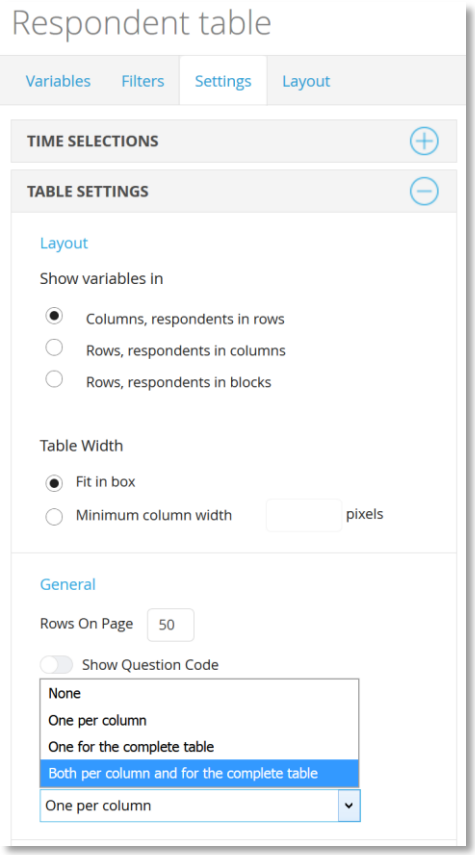
Here we see an example of the new search logic, the user can make both a global search, which is applied to all columns, and a search in a specific column. These combined searches are treated as AND.

Age group	Gender	Household Income	Positive comment	Negative comment
45-54	Man	35 001 - 45 000 Euro	dolor sit amet, consectetur	dolor sit amet, consectetur
35-44	Man	25 000-35 000 Euro	congue lacinia magna ornare a.	congue lacinia magna ornare a.
65 +	Woman	45 001- 55 000 Euro	sem scelerisque varius.	sem scelerisque varius.
55-64	Woman	55 001- 64 000 Euro	fermentum quis metus. Aliquam erat volutpat.	fermentum quis metus. Aliquam erat volutpat.
45-54	Man	45 001- 55 000 Euro	libero non turpis molestie non vehicula sem ullamcorper.	libero non turpis molestie non vehicula sem ullamcorper.
15-24	Woman	25 000-35 000 Euro	neque et vulputate	neque et vulputate
15-24	Man	25 000-35 000 Euro	vel erat ornare sagittis.	vel erat ornare sagittis.
15-24	Man	25 000-35 000 Euro	fermentum eu eleifend orci condimentum.	fermentum eu eleifend orci condimentum.
25-34	Woman	55 001- 64 000 Euro	sodales vitae suscipit mauris posuere.	sodales vitae suscipit mauris posuere.

9.1 Setup

The definition of which search behavior to use in the Respondent table is, like before, defined in the Settings tab in the Table settings panel. The Search field list (see the image below) does now contain the following four options, the last option is the new one.

- None
- One per column
- One for the complete table
- Both per column and the complete table.


Respondent table
Variables
Filters
Settings
Layout
TIME SELECTIONS
TABLE SETTINGS
Layout
Show variables in
Columns, respondents in rows
Rows, respondents in columns
Rows, respondents in blocks
Table Width
Fit in box
Minimum column width
pixels
General
Rows On Page
50
Show Question Code
None
One per column
One for the complete table
Both per column and for the complete table
One per column