

Dapresy Pro 2017 Mid-Year Release



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7.2.1 Setup 70

1 - Introduction

This document describes new and improved features in the Dapresy Pro 2017 Mid-Year 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

Telephone: + 46 (0)76 019 89 42

2 - Overview

The Dapresy Pro 2017 Mid-Year release contains many great improvements, which you can see in the summary list slightly further down. Some of these key improvements are the ability to adjust the report size to fit any device (smartphones, tablets, etc.), and the option to define in which device each report will be shown. This will allow users to tailor make reports for all different device sizes!

A new color management logic has been added to improve efficiency when setting up projects. With this new logic, you can use your own colors in the color palettes and also connect items to specific color placeholders instead of setting a fixed color - this makes maintenance much easier.

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.

Storyteller and Form

- A new “Layout settings” panel has been added. The new panel has a collection of layout-related functions which were previously spread out in many different locations
- SVG images are now supported in the image object
- New support allows you to define the size of the report (the slide area) by selecting from standard sizes such as small screen, A4, PPT4:3, PPT 16:9, or set a custom size
- New option to set up “device filtering,” which allows you to select which device the report will be shown on
- New support for making PDF exports
- New ability to define which export abilities will be available: PPT, Excel, PDF, and Print
- A new background mode for creating your own slide backgrounds/headers/footers, etc.
- Updates to the Dynamic Text function in the Text object that allow you to show slide number, date, project names, etc.
- New ability to define which font will be default in new objects
- Improved hierarchical filter setup, a new ability to show all nodes (Including future nodes) in a certain level or a certain branch
- Improvements in charts and tables for selecting “All” items in answers, questions, and filter boxes.
- Improvements in the significance test functionality
 - New ability to perform the significance test between series
 - New ability to hide the comparison data points
 - New ability to show the significance test result with icons from the Icon and Shape library (only supported in tables)
 - New ability to show the significance test result with colored cell backgrounds (only supported in tables)

- New ability to show the significance test result with colored values (only supported in tables)
- A second set of symbols have been added so that by default you can now select if +/- or ↓/↑ will be used to indicate if a value is significant or not.
- New ability to define the starting letter (the letters are used to indicate to which value another value has been tested against)
- A new type of significance test has been added - “Norm/Population Z test”

Cross Table Tool 2.0

- New option to set up “device filtering,” which allows you to select which device the report will be shown on
- Improved hierarchical filter setup, and a new ability to show all nodes(including future nodes) in a certain level or a certain branch
- Visualize Significance Test with Colored Values

Document Archive 2.0

- New option to set up “device filtering,” which allows you to select which device the report will be shown on
- Improved hierarchical filter setup, and a new ability to show all nodes(including future nodes) in a certain level or a certain branch

New color management logic:

- New ability to use RGB and HSL codes when defining colors as a complement to Hex codes
- New ability to define the colors shown in the color palette in the color picker
- A new Color template logic which includes “color placeholders.” Items such as questions, icons, chart backgrounds, etc. can be connected to a color placeholder instead of setting fixed colors which will dramatically improve setup and maintenance

Administration Pages

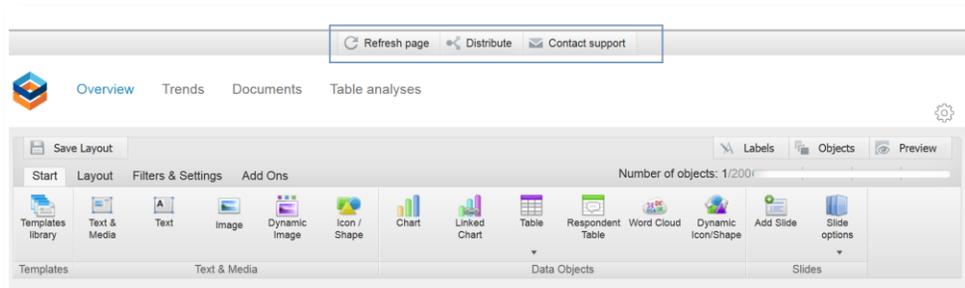
- Improvements have been made in Question blocks, Indexes and Merged variables. The content of these items can now be defined by code rules. This means that variables that are added to

the project in the future can automatically be included in, for example, an Index or a Question block

Note: When you are logged in as an Administrator, there are some general options available such as Contact support, Distribute and Refresh page. These options were previously integrated in the “skin” and could occasionally negatively affect the layout.

These administrative options have now been moved to a separate administration toolbar located at the top of the page, see the example in the image below. The new toolbar is not affected by the skin settings, therefore the options are always visible and displayed in the same position no matter what skin is used. Just as before, these buttons are only shown for the Administrator users, so the Report users cannot see the new toolbar at all.

The image below shows the new administrative toolbar for general options such as ‘Distribute’ and ‘Contact support.’



3 - Storyteller and Form Updates

The following improvements have been made in the Storyteller and Form report. Each of these are described in detail further down.

- A new “Layout settings” panel has been added. The new panel has a collection of layout-related functions which were previously spread out in many different locations
- SVG images are now supported in the image object
- New support allows you to define the size of the report (the slide area) by selecting from standard sizes such as small screen, A4, PPT4:3, PPT 16:9, or set a custom size
- New option to set up “device filtering,” which allows you to select which device the report will be shown on
- New support for making PDF exports
- New ability to define which export abilities will be available: PPT, Excel, PDF, and Print
- A new background mode for creating your own slide backgrounds/headers/footers, etc.
- Updates to the Dynamic Text function in the Text object that allow you to show slide number, date, project names, etc.
- New ability to define which font will be default in new objects
- Improved hierarchical filter setup, and a new ability to show all nodes (including future nodes) in a certain level or a certain branch
- Improvements in charts and tables for selecting “All” items in answers, questions, and filter boxes.
- Improvements in the significance test functionality
 - New ability to perform the significance test between series
 - New ability to hide the comparison data points
 - New ability to show the significance test result with icons from the Icon and Shape library (only supported in tables)
 - New ability to show the significance test result with colored cell backgrounds (only supported in tables)
 - New ability to show the significance test result with colored values (only supported in tables)
 - A second set of symbols have been added so that by default you can now select if +/- or ↓/↑ will be used to indicate if a value is significant or not.
 - New ability to define the starting letter (the letters are used to indicate to which value another value has been tested against)
 - A new type of significance test has been added - “Norm/Population Z test”

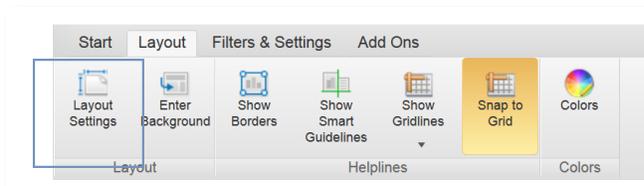
3.1 New Layout Settings Panel & moved functions -show all slides, show PPT as slide background etc.

A new Layout Settings panel has been implemented in the Storyteller and Form setup. This collects all of the settings pertaining to the layout and export formats. Some of the settings are new, such as the ability to select export formats or support for defining slide size. However, the Layout Settings panel also contains previously existing settings. The list below shows the existing settings which have been moved into the new Layout panel.

- Show all slides
- Hide slide navigation
- Show PPT template as slide background
- Chart image quality settings

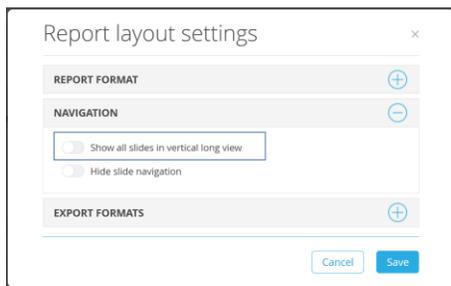
The new Layout Settings panel is located in the Layout tab, as shown below. All of the new settings are described further down in this document.

The image below shows how to enter the Layout settings panel. Simply click the highlighted option.

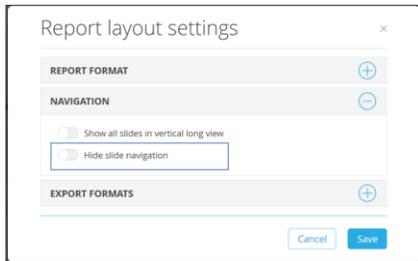


The following images show the new locations of settings that were previously not in the Layout settings panel.

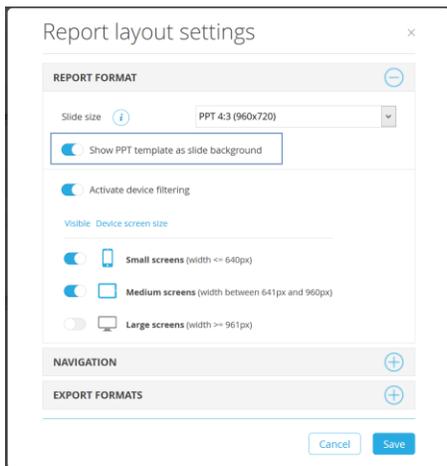
The image below highlights the “Show all slides” option which was previously located in the “Change storyteller” panel.



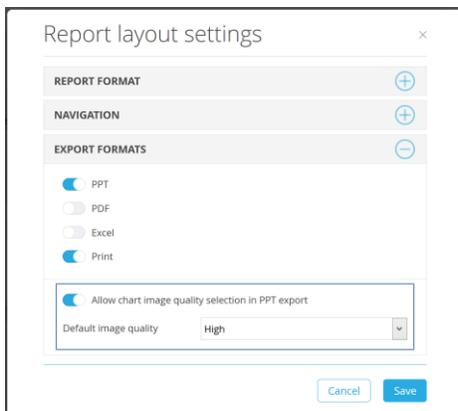
The image below highlights the “Hide slide navigation” option which was previously located in the ribbon menu of the Layout tab.



The image below highlights the “Show PPT template as slide background” option which was previously located in the ribbon menu in the Layout tab.



The image below highlights the “Chart image quality” options which was previously located in the ribbon menu of the Layout tab.



3.2 SVG Image Format Support

SVG images can now be uploaded to Storyteller and Form reports via the Image object. The SVG format is the preferred image format, as it is vector based which allows images to easily resize without becoming blurry. The size of the SVG files is also significantly smaller compared to PNG and JPEG, which results in better performance (faster loading time) as less data volumes needs to be transferred from the server to the user.

3.3 Adjustable Slide Size

The size of the Storyteller and Form slide can now be adjusted per report to fit different needs. For instance, a report can be adjusted to fit the PPT 16:9 format or can be customized for smartphones. The slide size setting is made per report, though it can also be adjusted per individual slide.

Any of the standard formats can be used, or you can enter a custom slide size. The following standard sizes are supported:

- PPT 4:3 (960x720)
- PPT 16:9 (1280x720)
- A4 landscape (1123x796)
- A4 portrait (796x1123)
- Small screen format (350x500)

Note 1: No matter what format you are using, the same report functions, objects, and behavior are applied to all. The only exception is the ability to make PPT exports, and these are only available if any of the PPT formats are used.

Note 2: In the previous version of Dapresy Pro, it was possible to use an A4 format which was very limited in terms of functionality. For example, it did not support charts at all. This legacy A4 report format has been removed and has been replaced with the new A4 format which supports the same functionality as the standard PPT 4:3 format. The old legacy format is still available for editing in the old projects, but no new reports of the old A4 legacy reports can be created.

NOTE 3: Most of the existing skins/themes have been adjusted to the PPT 4:3 format, so they might have a fixed width. Therefore, they may not look great if the reports are made wider than 960 pixels. The skin named “Dapresy_v10.0”, which you have access to, is a Dapresy styled responsive skin which looks good in all screen and report sizes. If you want to add your own responsive skin, then it can be ordered via support.

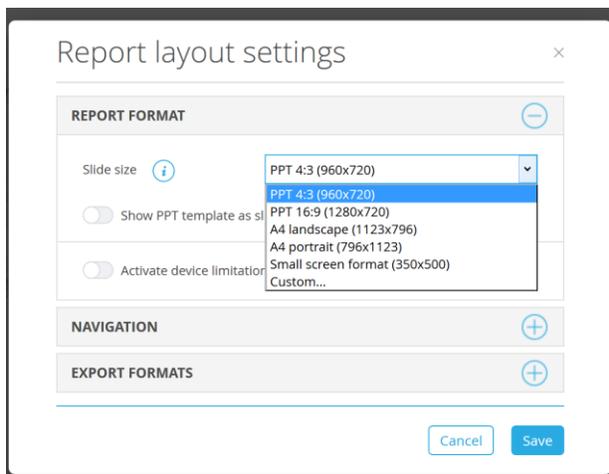
The three images below show how the navigation looks across different devices when the Dapresy_v10.0 skin is used. Desktop (large screen) to the left, Tablet (medium screen) in the middle, and Smartphone (small screen) to the right.



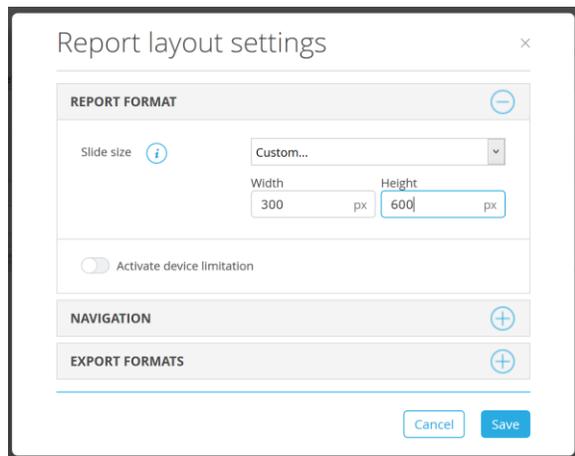
3.3.1 Define the Slide Size - Report Level Setup

The report level slide size can be defined in the new Layout settings panel. The image below shows the Report Format area in the Layout Settings panel. You can either select any of the standard formats (see first image below), or enter a custom slide size (see second image below).

The image below shows the standard formats.

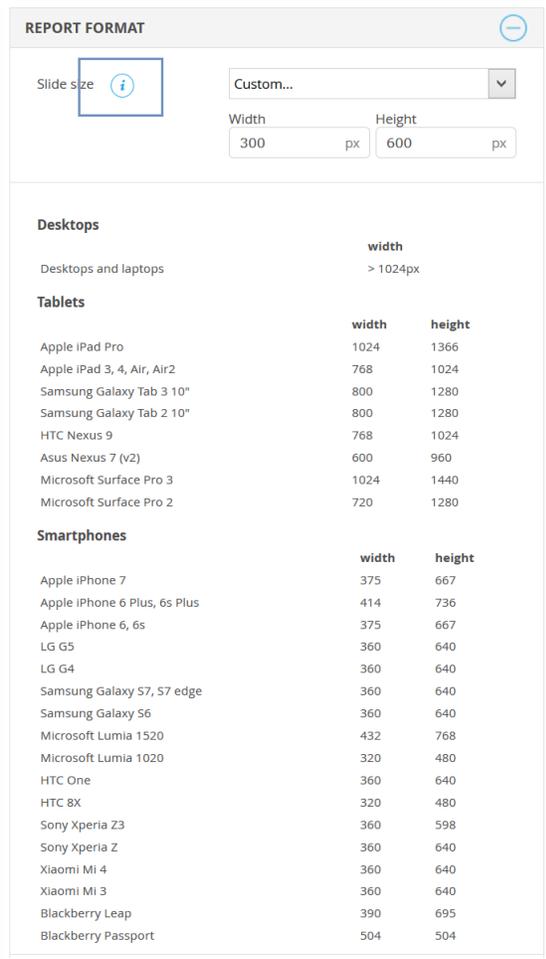


The image below shows the Custom option. When Custom is selected, you will have to enter the desired width and height of the report.



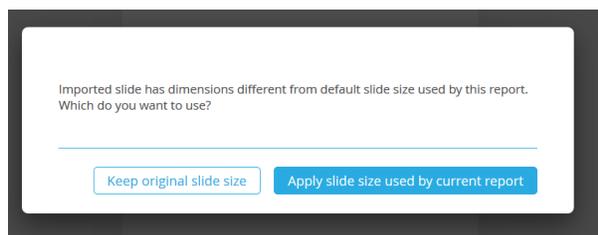
Note 1: When you create a new Storyteller or Form, then the default report size is PPT 4:3 if the skin (theme) applied to the project has a PPT template in 4:3 format attached. If the skin has a PPT 16:3 template attached, then the default format becomes PPT 16:9. If the skin has both a 4:3 and a 16:9 template, then the default size becomes PPT 16:9. See chapter 3.3.3 for notes about the PPT template files.

Note 2: The standard “Small screen format” uses the size 350x500 which fits most of the small screen devices on the market. If you would like to see the different screen size options for different devices, then just click on the information icon, as shown in the image below.

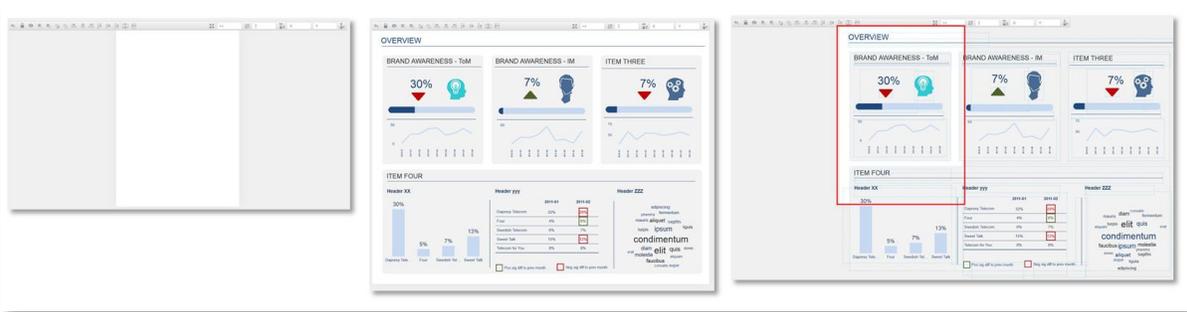


Note 3: When importing a slide from another report or from the Report template library, then you will have to choose if the original slide size or if the slide size of the current report will be used. If you apply the slide size of the current report, then some objects might be placed outside the slide area (as shown in the second image below). You will have to manually adjust the content so that all items fit in the slide area.

The image below shows the information that appears if you import a slide with another format.



The image below shows what happens when you import a slide with a bigger size than the size of the current report. The left image shows a “Small screen format” report and the middle image shows a PPT 4:3 report. When the dashboard in the 4:3 report is imported into the Small screen format report, the result looks like the far right image. The red boarder indicates the slide size, which shows that most of the objects are now placed outside the slide area and need to be adjusted manually.



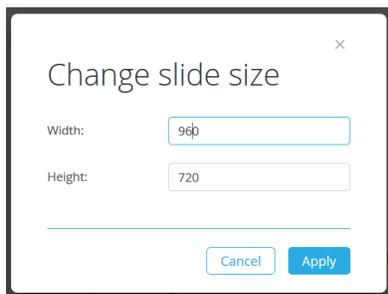
3.3.2 Define the Slide Size - Slide Level Setup

To change the size of a specific slide, you will have to enter the “Change slide size” panel (see images further down). The size you define in this panel will only be applied to the current slide.

The image below shows how to enter the Change slide size panel.



The image below shows the Change slide size panel.



Note: If the report will support PPT export, then we do not recommend changing the size of a particular slide, because the exports might look bad. For PDF exports, it does not matter as each slide can have a different size in the PDF export.

3.3.3 PPT Templates (.pot files)

Each skin/theme has a PPT 4:3 pot file attached. If you want to use the PPT 16:9 format, then the skin needs a 16:9 .pot file attached. As always, PPT template file updates can be done via the file manager or ordered via the support team.

Note: The pot files for 16:9 will have “_16_9” as a suffix in the file name (example: template_2017_16_9.pot). All pot files that don’t have “_16_9” as a suffix are treated as 4:3 templates.

3.4 Device Filtering

A new “Device filtering” logic has been added that allows you to define what device size a report will be shown in. A common use case could be to have two versions of the same dashboard, one version is shown for Medium and Large screen sizes (usually tablets and desktops) and another version is shown for small screen sizes (usually smartphones).

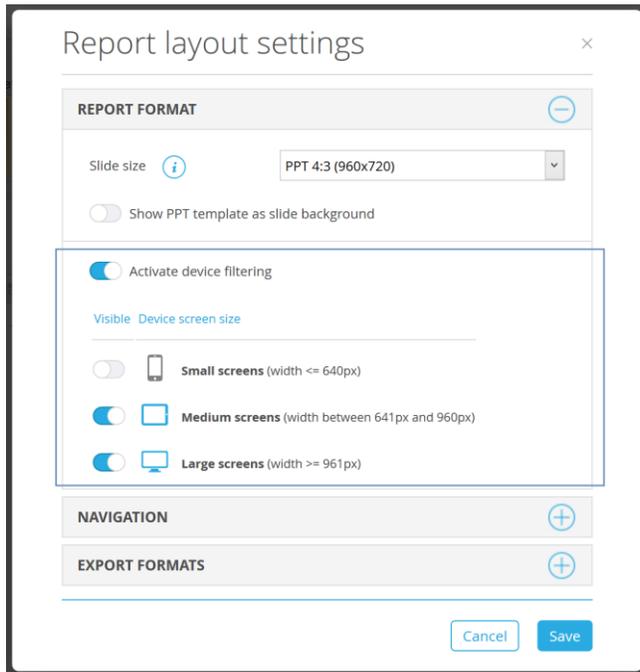
The Device filtering logic is supported in Storyteller, Form, Cross table tool 2.0 and Document Archive 2.0.

3.4.1 Setup of Device Filter

The device filter is set up in the new Layout Settings panel. To activate the filtering, enable the “Activate device filtering” option, as shown in the image below. When the option is enabled, you can select which screen sizes the report will be shown.

Note: The device filtering is disabled by default. This means that a report is shown in all devices until the device filtering is activated.

The image below shows the setup of a device filter. The report in in the image will only appear when the user uses a medium or a large screen device (usually tablets and desktops).



3.4.2 Fine-Tune the Ranges for Small, Medium and Large Screens

By default, Dapresy categorizes the different screen sizes as shown in the list below.

- Small: screen width ≤ 640 pixels
- Medium: screen width between 641-960 pixels
- Large: screen width ≥ 960 pixels

Small, medium and large are typically smartphones, tablets and desktops, but not always. Specifically, tablets come in many different screen sizes. In the image below, you will see how the most common tablets are treated based on the ranges above. As shown, most tablets are treated as medium screens but the Apple iPad Pro and Microsoft Surface Pro 3 are treated as large screens while Asus Nexus 7 is treated as a small screen size.

Tablets	width	height	
Apple iPad Pro	1024	1366	<div style="display: flex; flex-direction: column; align-items: center;"> <div style="width: 20px; height: 20px; background-color: #e6f2ff; margin-bottom: 5px;"></div> <div style="width: 20px; height: 20px; background-color: #ffe6e6; margin-bottom: 5px;"></div> <div style="width: 20px; height: 20px; background-color: #e6ffe6; margin-bottom: 5px;"></div> </div>
Apple iPad 3, 4, Air, Air2	768	1024	
Samsung Galaxy Tab 3 10"	800	1280	
Samsung Galaxy Tab 2 10"	800	1280	
HTC Nexus 9	768	1024	
Asus Nexus 7 (v2)	600	960	
Microsoft Surface Pro 3	1024	1440	
Microsoft Surface Pro 2	720	1280	

These ranges for small, medium and large can be fine-tuned in the Project settings page if needed.

The image below shows the Project settings page where the ranges can be adjusted.



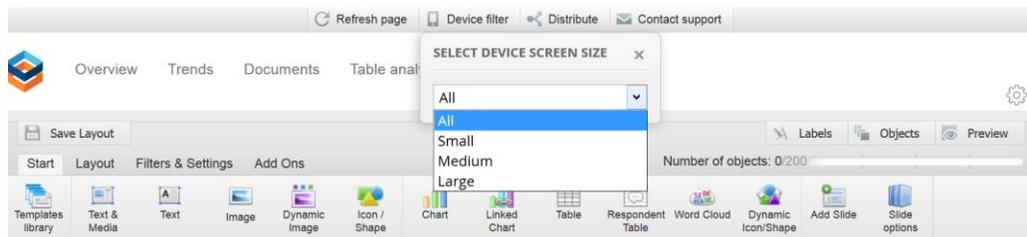
3.4.3 Device Filtering Applied to Different User Roles

The device filtering logic is slightly different for Administrators and Report users, as an Administrator must be able to view and make the setup for small and medium screen reports on a desktop (a large screen).

- A Report user can only see the reports that will be shown based on the device size.
- By default, An Administrator will see all reports when working on a desktop (large screen). The device filtering is only applied when viewing the project through a small or medium size device.

As the administrator sees all reports when working on a desktop, a “Device filter” can be used to only show all small reports, large reports, and so on. Using this Device filter allows for an easier overview of the setup.

The image below shows the device filter which is located in the new administrative toolbar. The filter only appears if any device filtering has been enabled in the project. The Device filter is also only shown for Administrator users and not for Report users.



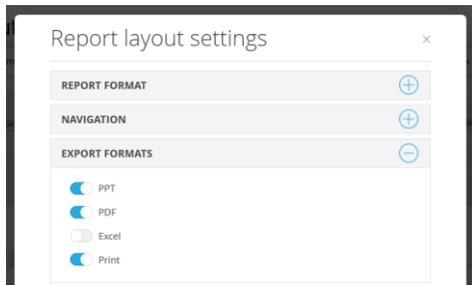
3.5 PDF Export and Definition of Export Formats

3.5.1 Storyteller

Previously, a Storyteller report could be exported to PPT, Excel, and print. The export to PPT and print were always available, but Excel could be turned on or off.

There is now a new option to export content to a PDF. Additionally, there are new settings to allow you to turn each export format on or off, as shown in the image below. These settings are located in the new Layout Settings panel, and PPT and print are now the default export options for new reports.

The image below shows where to set up the export formats in the Layout Settings panel.



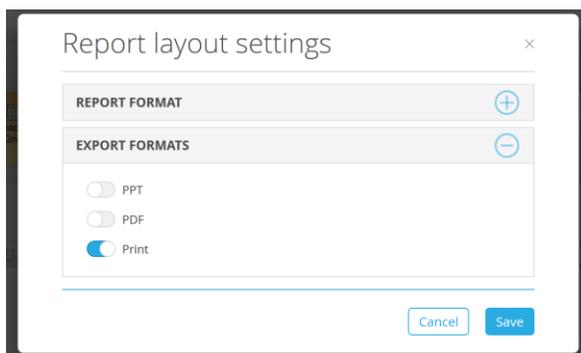
Note 1: The PPT option is only available if the slide size formats are PPT 4:3 or PPT 16:9.

Note 2: When exporting to PPT, a PPT .pot (template) file is always used. This adds a first page, header, footer, and a last page. This is different from the PDF export, because the PDF is just an export of what is shown online and does not contain any additional first/last page or footers. If you want to add any slide numbers or footers, then you can use the new “Slide background” logic described in chapter 3.6.

3.5.2 Forms

Previously, a Form report could only be printed. Now it can also be exported to PPT and PDF. Similar to the Storyteller, you can also decide which export formats will be available. This setting is located in the new Layout Settings panel, and PPT and print are now the default options for new Form reports.

The image below shows where to setup the export formats.



Note 1: The PPT option is only available if some of the slide size formats are PPT 4:3 or PPT 16:9.

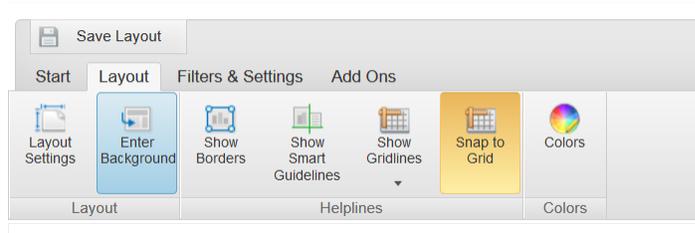
3.6 Slide Background Mode

A new “Slide background mode” has been added. This is used to add objects that will be shown on every slide such as footers, logos or shapes that are used to color the slide background.

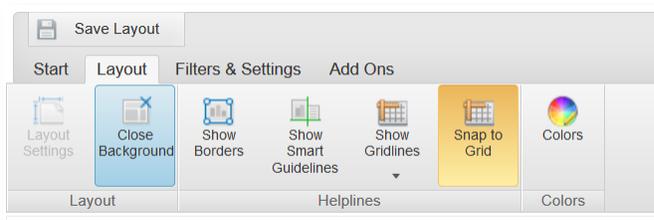
The background objects can be shown online and in exports, or just in exports. The latter option is best used when you want a clean, online experience but want page numbers and footers in exported documents.

You can access the slide background via the ribbon menu, as shown in the image below. The slide background is always empty by default. All types of objects such as charts, images and text objects can be used in the slide background. To close the background, simply click the button shown in the second image below.

The image below shows how to enter the slide background.

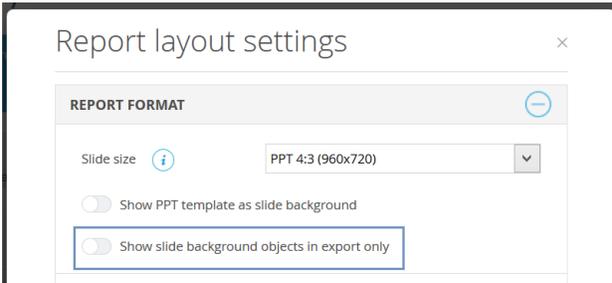


The image below shows how to close the slide background.



By default, the slide background objects appear in both online and in exports. If you only want the background objects to appear in exported files, then you can set this up in the Layout settings panel.

The image below shows the option to select if you only want the slide background objects to appear in exported files and not online. This setting is only available if the report contains objects that are in the slide background.

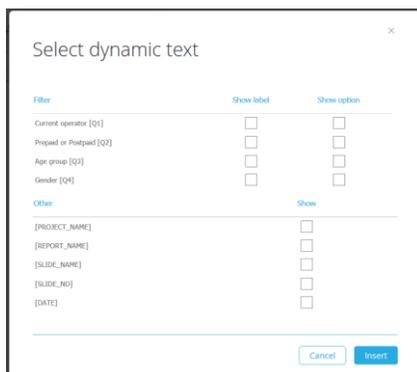
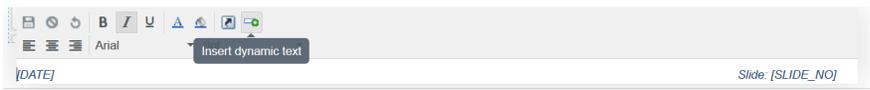


3.7 New Dynamic Text Items - Slide Number, Date, Slide Name, etc.

The Dynamic text function in the Text box has recently been improved. You can now automatically add project name, report name, slide name, slide number and today's date to the page by using the Dynamic text objects.

These items can for example easily be used in the slide background since you just need to add them once to get the slide number, project name etc. into each page. These new items are also great to use when creating slide footers to be stored in the Report template library, because you don't need to make any manual changes when importing them to a new project!

The first image below shows how to enter the dynamic text panel. The second image below shows the dynamic text panel.



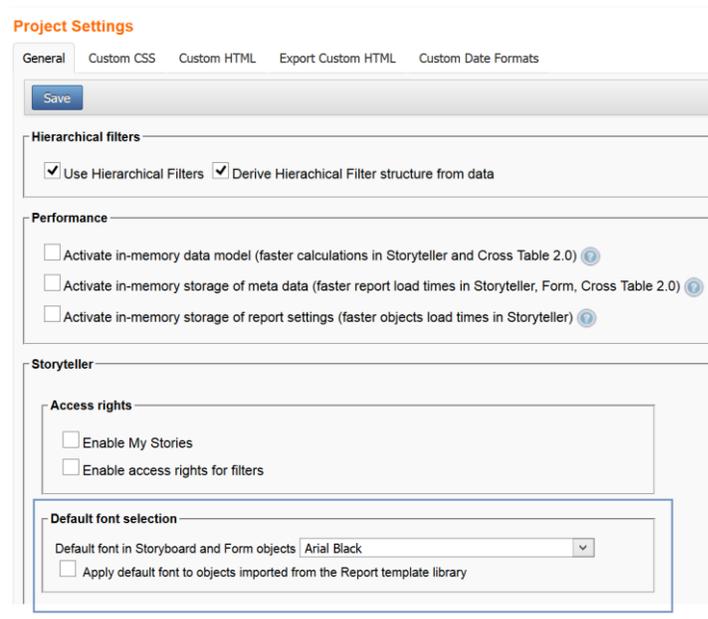
3.8 Default Font

A new setting is available on the project level that allows you to change the default font. The font that you select will be used by default in all new objects in the Storyteller and Form, making for a much more efficient setup process.

You can select the default font in the Project settings page (as shown in the image below). When a new font is selected, it will be applied to all new objects. However, you can also choose to change the font in all of the existing objects. This option is available when you select a new font is selected.

You can also choose whether or not the default font will be applied to new objects that are imported from the report template library. When this option is enabled, all objects imported from the report template library will use the default font - no matter what font they had when the objects were added to the library. This option is enabled by default.

The image below shows where the default font settings are located in the Project Settings page.



3.9 “All” Option in Questions, Answers and Filter Boxes for Easier Setup and Maintenance

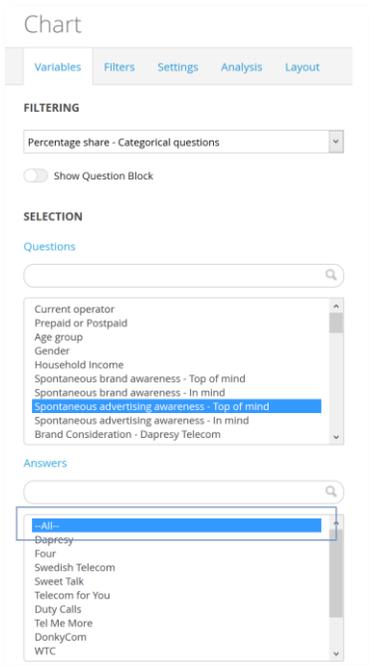
To better manage the maintenance process when new meta data is added to a project, there is a new

“All” selection in chart and table setup so that new questions, answers, filter compares, etc. will be automatically added to charts and tables when the meta data is updated.

Below is an overview of the items that now have this “All” option:

- The Answer selection box in the chart and table setup
- The Question selection box in the chart and table setup (only present when Question block filtering is applied)
- The Filter selection boxes in the chart, table, word cloud, dynamic icon and respondent table setup

The image below shows an example of a chart setup. The new “All” option is highlighted in the Answer box below.



Below is the exact definition of “All” for the following selections:

Answer selection box:

- All current answers, plus all future answers
- Includes both regular answers and grouped answers
- “Inactivated” answers are not included

Question selection box:

- All current questions, plus all future questions in the selected question block (the “All” option is only available when Question block filtering is applied)
- “Inactivated” questions are not included

Filter selection box:

- All current answers in the selected filter, plus all future answers
- Includes both regular answers and grouped answers
- “Inactivated” answers are not included

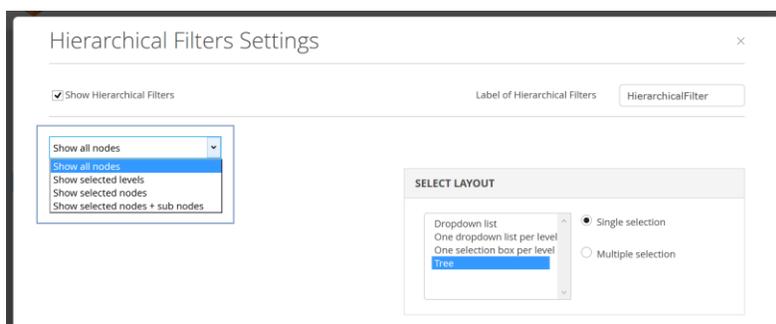
3.10 Improved H-Filter Setup

The H-Filter setup in the Storyteller has been updated to handle future updates of the Hierarchical filter in a more efficient way. Previously, you could manually pick which nodes would be shown in the report or you could select the option “All nodes” which included all existing and future nodes. Two new options have just been added: Show selected levels, and Show selected nodes + sub nodes. These are explained in further detail below.

Based on the two new options, the following four options are now available in the H-Filter setup of a report:

- Show all nodes (existing option)
- Show selected levels (new option)
- Show selected nodes (existing option)
- Show selected nodes+ child nodes (new option)

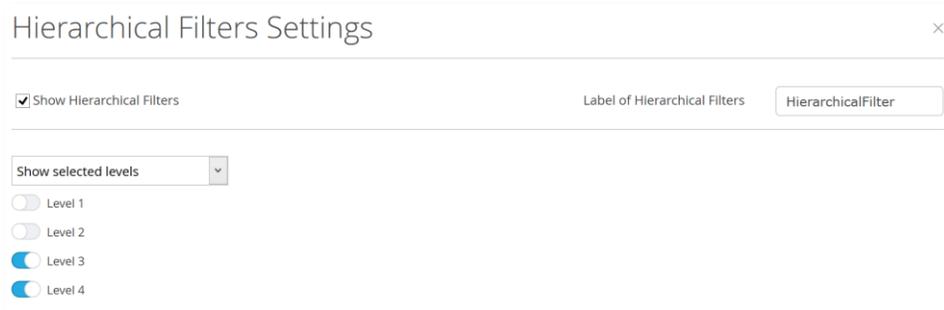
The image below shows the four options in the H-Filter setup panel.



New option 1: “Show selected levels”

All nodes in the selected level(s) are shown in the report (both the existing nodes and all future nodes).

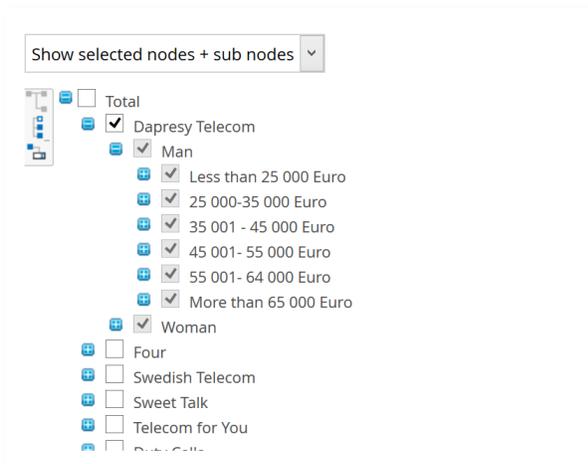
The image below shows an example of the setup. In the example below, all nodes in levels 3 and 4 are shown in the report.



New option 2: “Show selected + sub nodes”

All sub nodes of the selected nodes in the H-Filter tree are shown in the report. Both existing and future sub nodes are included.

The image below shows an example of the setup.



3.11 Significance Test Improvements in Storyteller Charts and Tables

The significance test support in the Storyteller chart and table objects has been improved. Each improvement below is described in further detail in the following chapters:

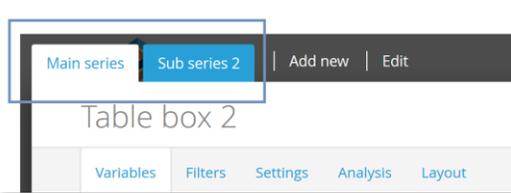
- New ability to perform the significance test between series
- New ability to hide the comparison data points
- New ability to show the significance test result with icons from the Icon and Shape library (only supported in tables)

- New ability to show the significance test result with colored cell backgrounds (only supported in tables)
- New ability to show the significance test result with colored values (only supported in tables)
- A second set of symbols have been added so that by default you can now select if +/- or ↓/↑ will be used to indicate if a value is significant or not.
- New ability to define the starting letter (the letters are used to indicate to which value another value has been tested against)
- A new type of significance test has been added - “Norm/Population Z test”

3.11.1 Perform Significance Test Between Series

Previously, it was possible to run a significance test between data points that were in the same series in a chart or table. Now, thanks to new support, you can run significance tests between series*.

**Series = The highlighted items in the image below.*



Since the structure of data can be completely different between series, then a cell by cell comparison is used when running significance test between series. This means that cell A1 in series 1 is compared to cell A1 in series 2, and cell A2 in series 1 is compared to cell A2 in series 2, and so on and so forth.

Below is an example of a table that tests different series against each other.

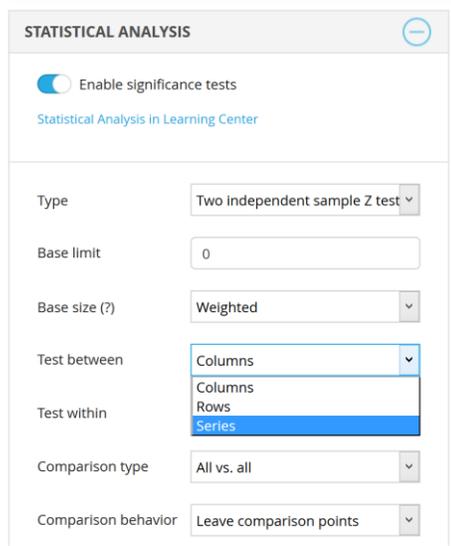
	(a) 2011
Brand Consideration - Dapresy Telecom	3.1 (b-)
Brand Consideration - Four	3.1
Brand Consideration - Swedish Telecom	3.0 (b+)
Brand Consideration - Sweet Talk	3.5 (b+)
	(b) 2011
Brand Consideration - Dapresy Telecom	3.6 (a+)
Brand Consideration - Four	3.1
Brand Consideration - Swedish Telecom	2.5 (a-)
Brand Consideration - Sweet Talk	3.4 (a-)

3.11.2.2 Setup

If a significance test is going to be run between two or more series, then all series have to use the same calculation type. Either all series need to be “Mean –Categorical questions” or “Percentage share – categorical questions.”

To setup a significance test between two or more series, just follow these two steps:

- In the section “Test between,” select the “Series” option (see image below).
Note: This option is only available in the Main series. It is also only available if the chart/table has multiple series and if all series are either “Mean –Categorical questions” or “Percentage share – categorical questions”



- Select how the series will be compared to each other in the “Comparison type” list. The same options that you use when doing a regular significance test are available:
 - All vs. all
 - Previous data point
 - Next data point
 - First data point
 - Last data point

Below you can see an example of each “Comparison type” option. The examples are based on a chart containing three series: Series 1, Series 2 and Series 3.

Example 1: All Vs All

- Cell A1 in series 1 is compared to A1 in series 2 and vice versa
- Cell A1 in series 1 is compared to A1 in series 3 and vice versa
- Cell A1 in series 2 is compared to A1 in series 2 and vice versa

Example 2: Previous data point

- Cell A1 in series 2 is compared to A1 in series 1
- Cell A1 in series 3 is compared to A1 in series 2

Example 3: Next data point

- Cell A1 in series 1 is compared to A1 in series 2
- Cell A1 in series 2 is compared to A1 in series 3

Example 4: First data point

- Cell A1 in series 2 is compared to A1 in series 1
- Cell A1 in series 3 is compared to A1 in series 1

Example 5: Last data point

- Cell A1 in Series 1 is compared to A1 Series 3
- Cell A1 in Series 2 is compared to A1 Series 3

3.11.2.2.1 Comparison Logic

When running a significance test between series, the value comparison is done cell by cell. A1 in series 1 is compared to A1 in series 2, and A2 in series 1 is compared to A2 in series 2, and so on and so forth.

In a situation where one of the series has fewer cells than the other series, then the test will not run in the cells that don't have a corresponding cell in the comparison series. See examples below.

Example 1: All cells in series 1 have a corresponding cell in series 2. The yellow cell in series 1 is tested against the yellow cell in series 2. The green cell in series 1 is tested against the green cell in series 2, and so on.

Series 1		Series 2	
33	24	45	64
65	75	54	23
42	53	38	86

Example 2: The cell B2 in Series 1 has no value. Therefore, no test is applied to cell B2 in Series 2.

Series 1		Series 2	
33	24	45	64
65		54	23
42	53	38	86

Example 3: The series 1 has 3 rows of data while series 2 only has 2 rows of data. No test is applied to the values in row 3 in series 1.

Series 1		Series 2	
33	24	45	64
65	32	54	23
42	53		

3.11.2 Hide Comparison Data Points

A new setting allows you to hide the comparison data points when doing a significance test. The image below shows an example, the result of the latest month is tested against the previous month (the +/- signs indicating the significant difference from the previous month). The previous month's results are not shown in the table.

The image below shows results where comparison data points (previous month's results) have been hidden.

Brand awareness Top of mind

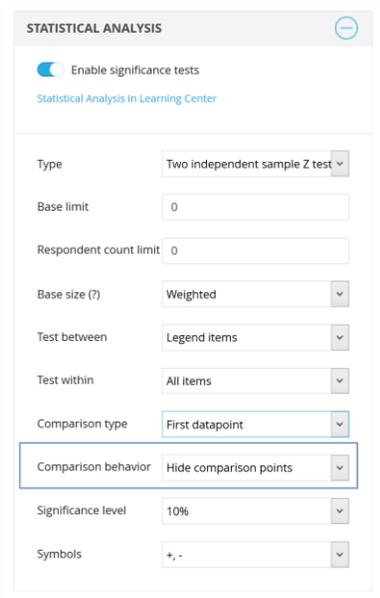
Latest month result compared to previous month

Dapresy Telecom	29% (↓)
Four	6% (↑)
Swedish Telecom	7%
Sweet Talk	12% (↓)
Telecom for You	8%
Duty Calls	7%

3.11.2.1 Setup

The setting to allow you to hide the comparison points is located in a dropdown list named "Comparison behavior," as shown in the image below. When the option "Hide comparison points" is selected, then all the comparison points will become hidden.

The image below shows the setting used to hide the comparison points.



STATISTICAL ANALYSIS

Enable significance tests
Statistical Analysis in Learning Center

Type: Two independent sample Z test

Base limit: 0

Respondent count limit: 0

Base size (?): Weighted

Test between: Legend items

Test within: All items

Comparison type: First datapoint

Comparison behavior: Hide comparison points

Significance level: 10%

Symbols: +, -

Note: If “All vs all” is selected in the “Comparison type” list, then the “Hide comparison points” option will not be available. Due to the nature of this function, it cannot be applied when all data points are tested against all data points.

3.11.3 Visualize Significance Test Result with Icons

Previously, the significance test result in the table object was indicated with symbols such as +/- or \uparrow/\downarrow . Now, you can visualize the significance test result with icons from the Icons and Shape library to make your layouts more eye-catching and easier to read. The images below show a few examples.

The images below show a few typical examples where icons from the Icon and Shape library are used to visualize the significance test result.

	2010-52	2011-01	2011-02	2011-03	2011-04	2011-05	2011-06	2011-07	2011-08
Dapresy Telecom	0.0	24.6	25.5	38.6	41.6	22.3	27.3	39.8	25.9
Four	22.9	7.5	4.1	2.6	1.7	9.3	5.5	0.0	10.4
Swedish Telecom	0.0	7.1	12.7	3.1	1.3	7.1	12.9	4.2	4.4
Sweet Talk	38.5	16.6	6.0	17.1	16.0	14.0	9.4	13.1	12.0
Telecom for You	15.3	8.0	13.1	7.2	4.6	7.6	6.5	5.1	11.7
Duty Calls	12.0	6.6	12.0	4.8	4.9	8.9	5.3	5.2	10.4
Tel Me More	0.0	11.3	6.1	9.9	11.5	13.4	9.5	7.3	7.9
DonkyCom	0.0	1.2	7.7	2.1	6.7	0.0	4.7	4.5	3.4
WTC	0.0	7.8	6.5	6.1	2.3	3.1	3.7	7.7	1.0
Donut Call	0.0	3.8	0.9	0.8	1.3	4.2	6.6	3.4	5.9
Other	0.0	5.5	4.5	4.0	1.9	6.6	2.0	5.6	4.9
Don't know	11.3	0.0	0.9	3.7	6.4	3.5	6.5	4.1	2.1

	2010-52	2011-01	2011-02	2011-03	2011-04	2011-05	2011-06	2011-07	2011-08
Dapresy Telecom	0.0	24.6	25.5	38.6	41.6	22.3	27.3	39.8	25.9
Four	22.9	7.5	4.1	2.6	1.7	9.3	5.5	0.0	10.4
Swedish Telecom	0.0	7.1	12.7	3.1	1.3	7.1	12.9	4.2	4.4
Sweet Talk	38.5	16.6	6.0	17.1	16.0	14.0	9.4	13.1	12.0
Telecom for You	15.3	8.0	13.1	7.2	4.6	7.6	6.5	5.1	11.7
Duty Calls	12.0	6.6	12.0	4.8	4.9	8.9	5.3	5.2	10.4
Tel Me More	0.0	11.3	6.1	9.9	11.5	13.4	9.5	7.3	7.9
DonkyCom	0.0	1.2	7.7	2.1	6.7	0.0	4.7	4.5	3.4
WTC	0.0	7.8	6.5	6.1	2.3	3.1	3.7	7.7	1.0
Donut Call	0.0	3.8	0.9	0.8	1.3	4.2	6.6	3.4	5.9
Other	0.0	5.5	4.5	4.0	1.9	6.6	2.0	5.6	4.9
Don't know	11.3	0.0	0.9	3.7	6.4	3.5	6.5	4.1	2.1

	2011-08	
Dapresy Telecom	25.9	▼
Four	10.4	
Swedish Telecom	4.4	
Sweet Talk	12.0	
Telecom for You	11.7	▲
Duty Calls	10.4	▲
Tel Me More	7.9	
DonkyCom	3.4	
WTC	1.0	▼
Donut Call	5.9	▲
Other	4.9	
Don't know	2.1	▼

3.11.3.1 Setup

To use icons to visualize the significance test result, follow these steps:

- Select the option "Icons" in the Visualization type list*

STATISTICAL ANALYSIS

Enable significance tests
[Statistical Analysis in Learning Center](#)

Type: Two independent sample Z test

Base limit: 0

Respondent count limit: 0

Base size (?): Weighted

Test between: Columns

Test within: All Items

Comparison type: Previous datapoint

Comparison behavior: Hide comparison points

Significance level: 10%

Visualization type: Icons

- Select the desired icons from the Icon and shape library (enter edit mode by clicking the icons)

Visualization type: Icons

Positive icon: 

Negative icon: 

Icon size: Width: 20, Height: 20

Icon position: Right

- Select the size of the icons in pixels

Visualization type: Icons

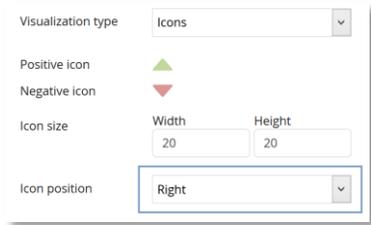
Positive icon: 

Negative icon: 

Icon size: Width: 20, Height: 20

Icon position: Right

- Select the position of the icons in the cell



***Note:** The significance test result can be visualized with icons when a value is tested against another value. This option is not available when all values in the table are tested against each other, because it is not possible to show multiple icons within the same cell.

3.11.4 Visualize Significance Test with Colored Cell Background

The significance test result in the table object can be displayed with colored cell backgrounds instead of icons or symbols such as +/- . The image below shows an example of this.

The image below shows an example of a table that displays the significance test result with colored cell backgrounds.

	2011-04	2011-05	2011-06	2011-07	2011-08
Dapresy Telecom	42%	22%	27%	40%	26%
Four	2%	9%	6%	0%	10%
Swedish Telecom	1%	7%	13%	4%	4%
Sweet Talk	16%	14%	9%	13%	12%
Telecom for You	5%	8%	6%	5%	12%
Duty Calls	5%	9%	5%	5%	10%

3.11.4.1 Setup

To use colored cell backgrounds to visualize the significance test, simply select the “Colored backgrounds” option in the in the Visualization type list (see image below).

The image below shows the option to apply colored cell backgrounds.

STATISTICAL ANALYSIS ⊖

Enable significance tests
[Statistical Analysis in Learning Center](#)

Type: ▾

Base limit:

Respondent count limit:

Base size (?): ▾

Test between: ▾

Test within: ▾

Comparison type: ▾

Comparison behavior: ▾

Significance level: ▾

Visualization type: ▾

*Note: The significance test result can be visualized with colored cell backgrounds when a value is tested against another value. This option is not available when all values in the table are tested against each other.

The background colors for positive and negative results are defined in the Project settings page, as shown in the image below.

Low base warnings

"Base size warning"-text:

"Hide series with low base"-text:

Hide/warn for low base visualization

Hide series with low base:

Warn for series with low base:

Significance test visualization

	Set 1	Set 2
Significant positive:	<input text"="" type="text" value="↑"/>	
Significant negative:	<input type="text" value="↓"/>	<input type="text" value="↓"/>
Low base:	<input type="text" value="-"/>	<input type="text" value="-"/>

Significant positive ●

Significant negative ●

Note: the significance test visualization settings are applied to both the Storyteller objects and the Cross table tool

3.11.5 Visualize Significance Test with Colored Values

The significance test result in the table object can be shown with colored values rather than icons or symbols such as +/- . The image below shows an example of this.

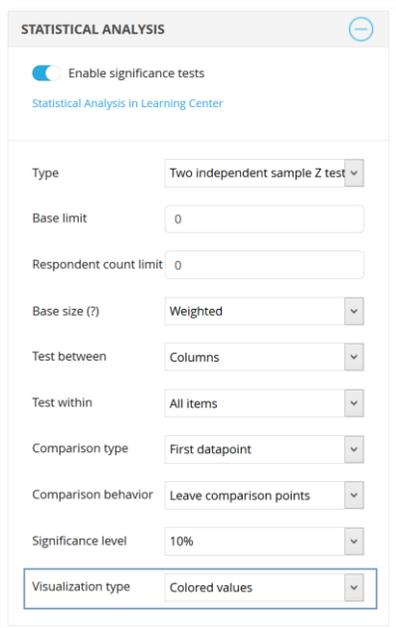
The image below shows an example of a table displaying the significance test result with colored values.

	2011-04	2011-05	2011-06	2011-07	2011-08
Dapresy Telecom	42%	22%	27%	40%	26%
Four	2%	9%	6%	0%	10%
Swedish Telecom	1%	7%	13%	4%	4%
Sweet Talk	16%	14%	9%	13%	12%
Telecom for You	5%	8%	6%	5%	12%
Duty Calls	5%	9%	5%	5%	10%

3.11.5.1 Setup

To use colored values to visualize the significance test, simply select the “Colored values” option in the in the Visualization type list (see image below).

The image below shows the option to apply colored values.



STATISTICAL ANALYSIS

Enable significance tests
[Statistical Analysis in Learning Center](#)

Type: Two independent sample Z test

Base limit: 0

Respondent count limit: 0

Base size (?): Weighted

Test between: Columns

Test within: All items

Comparison type: First datapoint

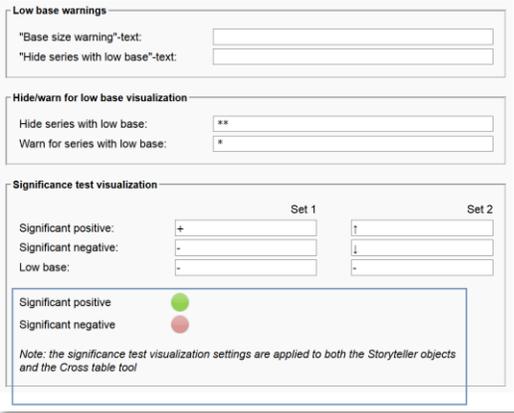
Comparison behavior: Leave comparison points

Significance level: 10%

Visualization type: Colored values

*Note: The significance test result can be visualized with colored values when a value is tested against another value. This option is not available when all values in the table are tested against each other.

The value colors for positive and negative results are defined in the Project settings page, as shown in the image below.



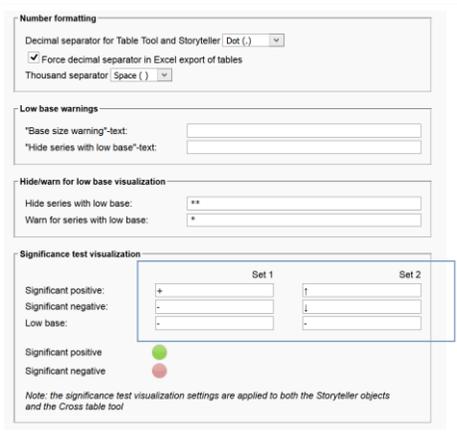
3.11.6 Second Set of Symbols - ↑/↓

A second set of symbols has just been added. By default, you can now select between +/- and ↓/↑ to indicate if a value is significant or not. The +/- symbols can for example be used when comparing segments (age groups, stores, gender, countries etc.) while the other set of symbols (↓/↑) can be used when comparing time intervals (weeks, months etc.).

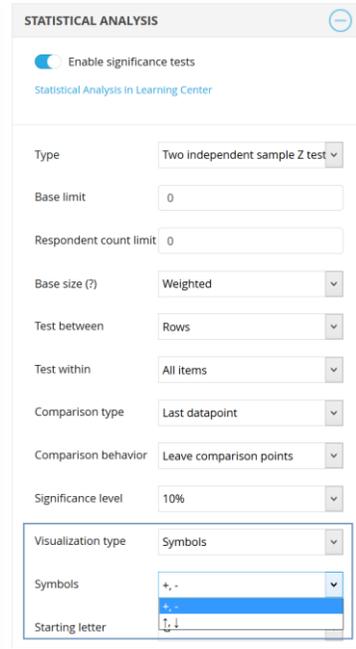
3.11.6.1 Setup

The symbols are defined in the Project settings page. You now have the ability to define two sets, then you can select among these sets when setting up a chart or a table.

The image below shows the Project settings page. You can define the two sets of symbols in the highlighted section.



The image below shows the setup of a chart and a table. Here, you can select which set to be used.



Note: The Symbols dropdown list only appears if “Symbols” is selected in the Visualization type list.

3.11.7 Definition for Starting Letter

When running significance tests, you can now define a new starting letter for your comparisons (the letters are used to indicate to which value another value has been tested against). Previously, a lowercase “a” was always the starting letter. Now, you can select any starting letter whether lowercase or capital.

It is useful to have the ability to select a starting letter when you have many table objects aligned next to each other. From the report user view, this will look like one table. In these situations, it is not intuitive to have the same letter in multiple places within the table. So, by selecting different starting letters, this issue can be avoided.

The image below shows three different examples. The table on the left shows the old, default option which uses “a” as the starting letter. The table in the middle uses “A” as the starting letter. And the table on the right uses “G” as the starting letter.

	Spontaneous brand awareness - Top of mind	Spontaneous brand awareness - In mind		Spontaneous brand awareness - Top of mind	Spontaneous brand awareness - In mind		Spontaneous brand awareness - Top of mind	Spontaneous brand awareness - In mind
(a) Dapresy Telecom	30% (b+,c+,d+,e+,f+)	90% (b+,c+,d+,e+,f+)	(A) Dapresy Telecom	30% (B+,C+,D+,E+,F+)	90% (B+,C+,D+,E+,F+)	(G) Dapresy Telecom	30% (H+,I+,J+,K+,L+)	90% (H+,I+,J+,K+,L+)
(b) Four	5%	50% (f+)	(B) Four	5%	50% (F+)	(H) Four	5%	50% (L+)
(c) Swedish Telecom	7% (b+)	50% (f+)	(C) Swedish Telecom	7% (B+)	50% (F+)	(I) Swedish Telecom	7% (H+)	50% (L+)
(d) Sweet Talk	13% (b+,c+,e+,f+)	49% (f+)	(D) Sweet Talk	13% (B+,C+,E+,F+)	49% (F+)	(J) Sweet Talk	13% (H+,I+,K+,L+)	49% (L+)
(e) Telecom for You	8% (b+,c+)	61% (b+,c+,d+,f+)	(E) Telecom for You	8% (B+,C+)	61% (B+,C+,D+,F+)	(K) Telecom for You	8% (H+,I+)	61% (H+,I+,J+,L+)
(f) Duty Calls	7% (b+)	46%	(F) Duty Calls	7% (B+)	46%	(L) Duty Calls	7% (H+)	46%

3.11.7.1 Setup

You can define the starting letter by simply choosing from the dropdown list, as shown in the image below.

The image below shows how you can set up the starting letter.

STATISTICAL ANALYSIS -

Enable significance tests
Statistical Analysis in Learning Center

Type: Two independent sample Z test ▾

Base limit:

Respondent count limit:

Base size (?): Weighted ▾

Test between: Rows ▾

Test within: All items ▾

Comparison type: All vs. all ▾

Comparison behavior: Leave comparison points ▾

Results to show: Positive only ▾

Significance level: 10% ▾

Symbols: +, - ▾

Starting letter: G ▾

Show significance in: Same row ▾

Note: The option to select a starting letter will only appear when any of the following options are selected in the “Comparison type” list:

- All vs All
- First datapoint
- Last datapoint

If any of the options below are selected, then you will not be able to set the starting letter. This is because no letters are used with any of these options.

- Next datapoint
- Previous datapoint

3.11.8 New Significance Test; Norm/Population Significance Test

A new significance test formula, Norm/Population test, has been added to complement the current Two independent sample Z test.

The “Norm/population test” is designed for testing survey calculated values against known population values. This test is often referred to as a Population test. However, as long as the Norm value is treated as a fixed value, then the test can be used to compare survey calculated values with Norms as well.

The new test has only been added to the Storyteller charts and tables, and has not been added to the Cross Table Tool 2.0 since the setup is too complex in a “Do It Yourself” cross table tool.

The setup of the Norm/Population test in Storyteller charts/tables is more complex than the regular Two independent sample Z test. This is because a survey calculated value (a percentage share or a mean value of a categorical question) is tested against a Norm/Population value which often (or always) has been imported to Dapresy Pro as numeric aggregated value stored in a numeric variable. This means that the test has to be done across series in a chart or table as one series cannot show the results for both categorical variables (survey result) and numeric variables (population/norm result).

3.11.1.1 Formulas

The next two chapters describe the formula of the new Norm/Population test.

3.11.1.1 Testing a Percentage Share Value Against a Norm/Population Value

The following input values are used in the formula:

- p = norm value
- x = test value (a % value)
- n = base size* of x
- $q=100-p$

**Note: The base size is weighted if the test value (x) is weighted.*

Formula:

- $Z = \text{diff} / \text{se}$
 - $\text{diff} = \text{ABS}(p - x)$
 - $\text{se} = \sqrt{p \times q / n}$

Critical Values, $n > 100$

The following critical values are used when the base size of the tested value is below 100.

Significance level	Critical value
10%	1,64485362695147000
5%	1,95996398454005000
1%	2,57582930354890000

Critical Values, $n \leq 100$

The list below shows the critical values used when the base size is above 100.

Note: Degrees of freedom = n (the base size of the test value)

Degrees of freedom	Level 10%	Level 5%	Level 1%
1	6.314	12.706	63.657
2	2.920	4.303	9.925
3	2.353	3.182	5.841
4	2.132	2.776	4.604
5	2.015	2.571	4.032
6	1.943	2.447	3.707
7	1.895	2.365	3.499
8	1.860	2.306	3.355
9	1.833	2.262	3.250
10	1.812	2.228	3.169
11	1.796	2.201	3.106
12	1.782	2.179	3.055
13	1.771	2.160	3.012
14	1.761	2.145	2.977
15	1.753	2.131	2.947
16	1.746	2.120	2.921
17	1.740	2.110	2.898
18	1.734	2.101	2.878
19	1.729	2.093	2.861
20	1.725	2.086	2.845
21	1.721	2.080	2.831
22	1.717	2.074	2.819
23	1.714	2.069	2.807
24	1.711	2.064	2.797
25	1.708	2.060	2.787
26	1.706	2.056	2.779
27	1.703	2.052	2.771
28	1.701	2.048	2.763
29	1.699	2.045	2.756
30	1.697	2.042	2.750
31	1.696	2.040	2.744
32	1.694	2.037	2.738
33	1.692	2.035	2.733
34	1.691	2.032	2.728
35	1.690	2.030	2.724
36	1.688	2.028	2.719
37	1.687	2.026	2.715
38	1.686	2.024	2.712
39	1.685	2.023	2.708
40	1.684	2.021	2.704
41	1.683	2.020	2.701

Degrees of freedom	Level 10%	Level 5%	Level 1%
51	1.675	2.008	2.676
52	1.675	2.007	2.674
53	1.674	2.006	2.672
54	1.674	2.005	2.670
55	1.673	2.004	2.668
56	1.673	2.003	2.667
57	1.672	2.002	2.665
58	1.672	2.002	2.663
59	1.671	2.001	2.662
60	1.671	2.000	2.660
61	1.670	2.000	2.659
62	1.670	1.999	2.657
63	1.669	1.998	2.656
64	1.669	1.998	2.655
65	1.669	1.997	2.654
66	1.668	1.997	2.652
67	1.668	1.996	2.651
68	1.668	1.995	2.650
69	1.667	1.995	2.649
70	1.667	1.994	2.648
71	1.667	1.994	2.647
72	1.666	1.993	2.646
73	1.666	1.993	2.645
74	1.666	1.993	2.644
75	1.665	1.992	2.643
76	1.665	1.992	2.642
77	1.665	1.991	2.641
78	1.665	1.991	2.640
79	1.664	1.990	2.640
80	1.664	1.990	2.639
81	1.664	1.990	2.638
82	1.664	1.989	2.637
83	1.663	1.989	2.636
84	1.663	1.989	2.636
85	1.663	1.988	2.635
86	1.663	1.988	2.634
87	1.663	1.988	2.634
88	1.662	1.987	2.633
89	1.662	1.987	2.632
90	1.662	1.987	2.632
91	1.662	1.986	2.631

42.	1.682	2.018	2.698
43.	1.681	2.017	2.695
44.	1.680	2.015	2.692
45.	1.679	2.014	2.690
46.	1.679	2.013	2.687
47.	1.678	2.012	2.685
48.	1.677	2.011	2.682
49.	1.677	2.010	2.680
50.	1.676	2.009	2.678

92.	1.662	1.986	2.630
93.	1.661	1.986	2.630
94.	1.661	1.986	2.629
95.	1.661	1.985	2.629
96.	1.661	1.985	2.628
97.	1.661	1.985	2.627
98.	1.661	1.984	2.627
99.	1.660	1.984	2.626
100.	1.660	1.984	2.626

3.11.1.2 Test a Mean Value Against a Norm/Population Value

The following input values are used in the formula:

- p= norm value
- x= tested mean value
- n= base size* of X
- SE = Standard error* of X
- S= Standard deviation* of X

**Note: The base size, the standard error, and the standard deviation are based on weighted values if the test value (x) is weighted.*

Formula

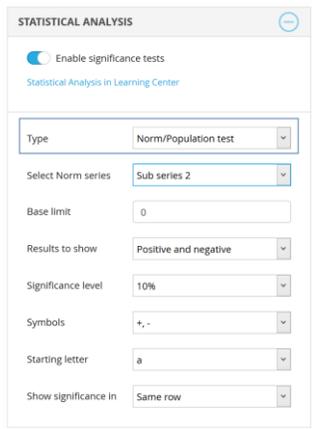
- Z=diff/se
 - Diff=ABS(p-x)
 - SE= Standard Deviation / \sqrt{n}
 - $S = \sqrt{\frac{\sum_{i=1}^n (x_i - \bar{x})^2}{n - 1}}$

3.11.1.2 Setup

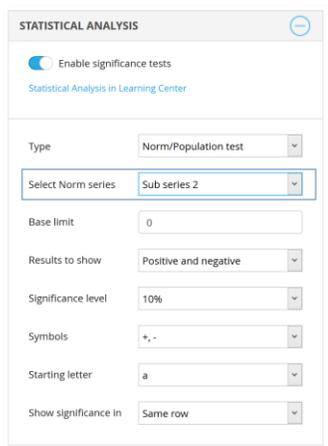
To run a Norm/Population test, the chart/table needs to have at least two series and one of the series needs to use the “Mean – Categorical” calculation or the “Percentage share – categorical” calculation.

Follow these 3 steps to run the Population/Norm test:

- Step 1 - Select “Norm/Population test” in Type dropdown list (shown in image below).
Note: Since the Norm/Population test can only be applied between series, this means it can only be setup in the Main series.



- Step 2 - Select in which series the Norm values will be found. The values in the other series are then compared to the Norm/Population series cell by cell. This means that cell A1 in the first non-Norm/Population series will be compared to cell A1 in the Norm/Population series, and cell A2 in the first non-Norm/Population series is compared to cell A2 in the Norm/Population series and so on.



- Step 3 - The rest of the settings are applied just like a regular Two independent sample Z test

Note: If any base limit is defined (see image below), then it is only applied to the non-Norm/Population series. This is because the Norm/Population values usually only have one respondent in the base size as it is aggregated result calculated outside Dapresy Pro.

The image below highlights the base size settings. This setting is not applied to the series defined as the Norm/Population series.

STATISTICAL ANALYSIS ⊖

Enable significance tests
[Statistical Analysis in Learning Center](#)

Type

Select Norm series

Base limit

4 Cross Table Tool 2.0 Updates

The following improvements have been made in the Cross table tool 2.0. Each of these is described in detail further down.

- New option to set up “device filtering,” which allows you to select which device the report will be shown on
- Improved hierarchical filter setup, and a new ability to show all nodes (including future nodes) in a certain level or a certain branch
- Visualize Significance Test with Colored Values

4.1 Device Filtering

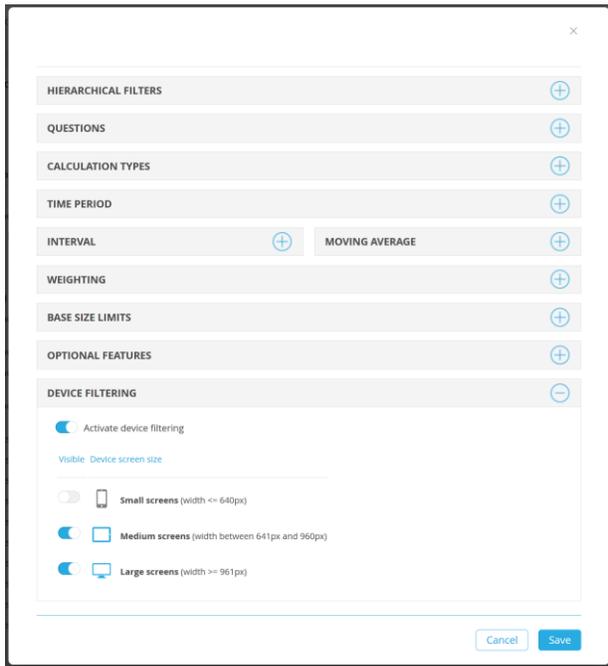
The same “Device filtering” logic that has been added in the Storyteller and Form (see details in chapter 3.4) has been added in the Cross Table Tool 2.0. This new logic allows you to define the device sizes that a Cross Table Tool 2.0 report will appear on. For example, you can choose to hide the cross table tool in smartphones and tablets, but have it appear in desktops.

4.1.1 Setup Device Filtering

To set up the device filtering, just navigate to the Setup panel (as shown in the images below). To activate the filtering, simply select the “Activate device filtering” option. Once this option is enabled, you can select which screen sizes you would like the report to appear in.

Note: By default, the device filtering is disabled. This means that a report will be shown in all devices by default.

The image below shows how you can setup the device filtering option in the Cross Table Tool 2.0. This particular report will only appear when the user uses a medium or a large screen device (usually tablets and desktops).



4.2 Improved H-Filter Setup

The H-Filter setup has been improved so that future updates will be handled in a more efficient way. Previously, you could manually pick which nodes you would like to show in the report, or you could select the option “All nodes” which included all existing and future nodes. Two new options have been added, “Show selected levels” and “Show selected nodes + sub nodes” to support other use cases. For instance, you can use these options when you want to show all existing nodes and future nodes in a specific branch or in a certain level.

This same functionality was also added in the Storyteller. See details in chapter 3.10.

4.4 Visualize Significance Test with Colored Values

The significance test result were previously shown with symbols such as +/- or with colored cell backgrounds. A new setting allows you to visualize the results with colored values. The image below shows an example of this.

The image below shows an example of a table displaying the significance test result with colored values.

Rows and columns Filters Calculations Settings Favorites Generate (84 cells)

Time period: 2011-01-01 to 2011-02-27
Filter: Hierarchical Filter (Total)
Significance testing: First column

		Total	15-24	25-34	35-44	45-54	55-64	65 +
		%	%	%	%	%	%	%
Spontaneous advertising awareness - Top of mind	Dapresy Telecom	6.5	5.3	11.2	5.1	5.9	8.3	3.2
	Four	9.2	10.4	4.3	13.5	8.1	12.5	6.4
	Swedish Telecom	7.5	6.8	11.7	4.8	5.9	7.2	8.5
	Sweet Talk	13.6	13.6	13.0	10.7	13.4	14.9	16.6
	Telecom for You	10.6	9.6	11.6	11.6	11.3	9.1	9.9
	Duty Calls	6.8	8.8	1.5	7.9	6.6	7.6	9.2
	Tel Me More	10.5	9.0	13.4	5.7	11.7	14.1	9.9
	DonkyCom	13.7	12.3	18.0	16.9	10.1	11.3	12.4
	WTC	7.0	8.5	5.9	7.5	8.3	3.6	7.9
	Donut Call	6.9	7.4	4.7	6.2	9.3	5.9	8.3
	Other	7.6	8.4	4.7	10.0	9.5	5.5	7.6
	Don't know	0.0	0.0	0.0	0.0	0.0	0.0	0.0

4.3.1 Setup

To use colored values to visualize the significance test, simply select the “Colored values” option in the in the “Show result as” list (see image below).

The image below shows the option to apply colored values.

SIGNIFICANCE TESTING

Enable significance tests

Significance level: 10% Base size: Weighted

Test between: Columns Comparison columns: First column

Base limit: 0 Respondent count limit: 0

Show result as: Colored values

STATISTICAL ANALYSIS -

Enable significance tests
[Statistical Analysis in Learning Center](#)

Type:

Base limit:

Respondent count limit:

Base size (?):

Test between:

Test within:

Comparison type:

Comparison behavior:

Significance level:

Visualization type:

***Note:** The significance test result can be visualized with colored values when a value is tested against another value. This option is not available when all values in the table are tested against each other.

The value colors for positive and negative results are defined in the Project settings page, as shown in the image below.

Low base warnings

"Base size warning"-text:

"Hide series with low base"-text:

Hide/warn for low base visualization

Hide series with low base:

Warn for series with low base:

Significance test visualization

	Set 1	Set 2
Significant positive:	<input type="text" value="+"/>	<input type="text" value="↑"/>
Significant negative:	<input type="text" value="-"/>	<input type="text" value="↓"/>
Low base:	<input type="text" value="~"/>	<input type="text" value="~"/>

Significant positive ●

Significant negative ●

Note: the significance test visualization settings are applied to both the Storyteller objects and the Cross table tool

5 Document Archive 2.0 Updates

The following improvements have been made in the Document Archive 2.0. Each of these is described in detail further down.

- New option to set up “device filtering,” which allows you to select which device the report will be shown on
- Improved hierarchical filter setup, and a new ability to show all nodes (including future nodes) in a certain level or a certain branch

5.1 Device Filtering

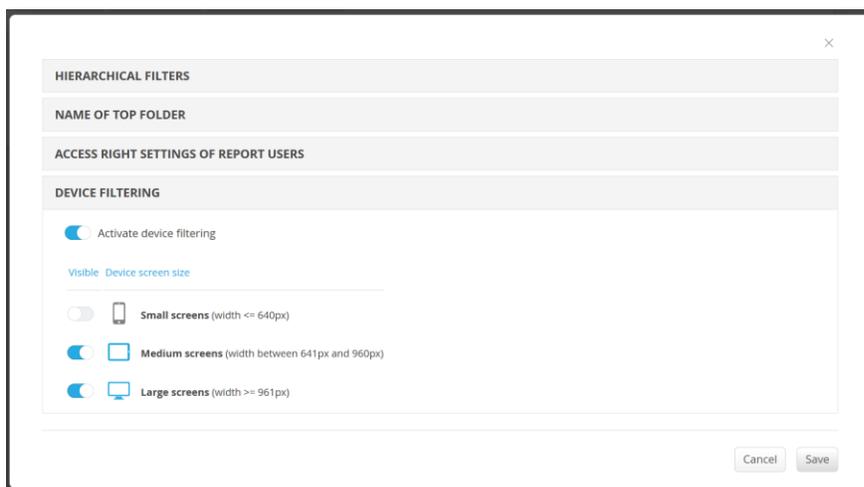
The same “Device filtering” logic that was added in the Storyteller and Form (see details in chapter 3.4) has been added in the Document Archive 2.0. This new device filter logic allows you to define what device sizes a Document Archive 2.0 report will appear in.

5.1.1 Setup Device Filtering

To set up the device filtering, just navigate to the Setup panel (as shown in the images below). To activate the filtering, simply select the “Activate device filtering” option. Once this option is enabled, you can select which screen sizes you would like the report to appear in.

Note: By default, the device filtering is disabled. This means that a report will be shown in all devices by default.

The image below shows how you can set up a device filter in the Document Archive 2.0. This particular report will only appear when the user uses a medium or a large screen device (usually tablets and desktops).



5.2 Improved H-Filter Setup

The H-Filter setup has been improved so that future updates will be handled in a more efficient way. Previously, you could manually pick which nodes you would like to show in the report, or you could select the option “All nodes” which included all existing and future nodes. Two new options have been added, “Show selected levels” and “Show selected nodes + sub nodes” to support other use cases. For instance, you can use these options when you want to show all existing nodes and future nodes in a specific branch or in a certain level.

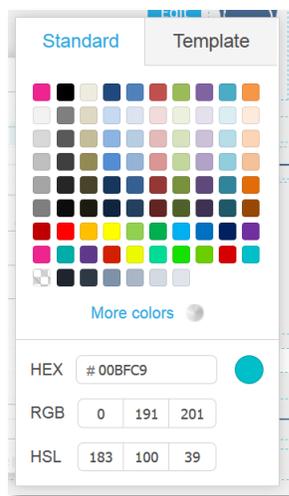
This same functionality was also added in the Storyteller. See details in chapter 3.10.

6 New Color Management Logic

The color logic in Dapresy Pro has been significantly improved to save time during setup and maintenance.

With this new update, you can adjust the colors in your color palette based on your needs. You can also now use Hex codes, RGB or HSL values to select custom colors. The color picker also remembers the last colors that were used, which makes it easier to reuse colors between objects.

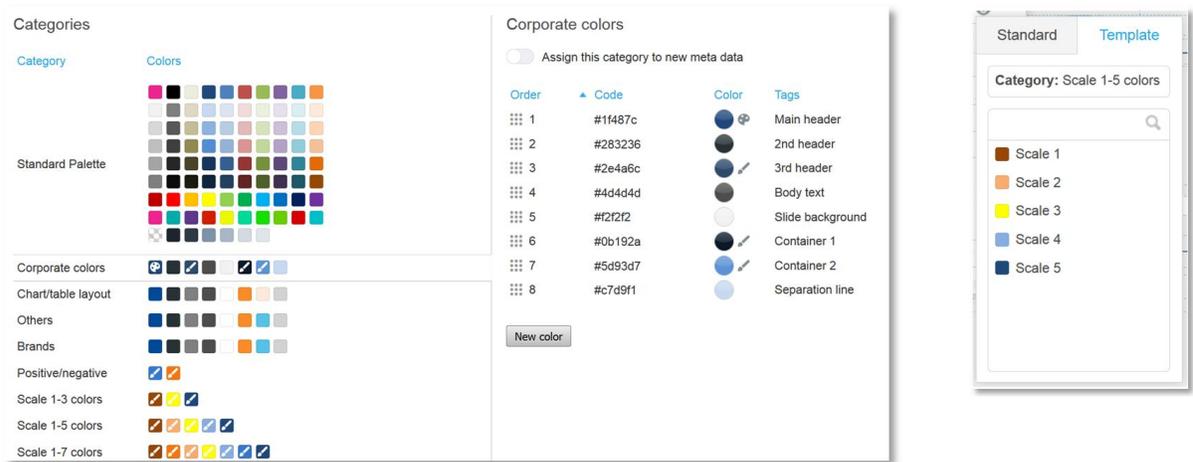
The image below shows the updated color picker. As shown, you can now enter either the Hex, RGB or the HSL code when entering a custom color.



Also, a brand new color template logic has been added to allow you to connect any item such as text objects, icons, labels in charts, etc. to a “color placeholder” instead of setting a fixed color. For example, all “headers” in a Storyteller report can be connected to a “header” color placeholder. This makes it very easy to update the color of all the headers since you just need to update a single color placeholder rather than multiple text objects.

These new color templates are created in a new Color Template library, and then a template is assigned to each project.

The larger image below shows how you can setup a color template. The categories of the template are shown on the left, and the options to edit colors, tags, sort order, etc. are made on the right. The smaller image shows how the color placeholder appears in the color picker.



Note: The ability to connect items to the color place holders and edit the colors of the color picker are only supported if the project has a new color template. Since all existing project don't have the new color templates by default, the logic is not supported. If you want to use the new color template logic in an old project, then see chapter 6.2.1.

The following chapters describe the new color logic in detail:

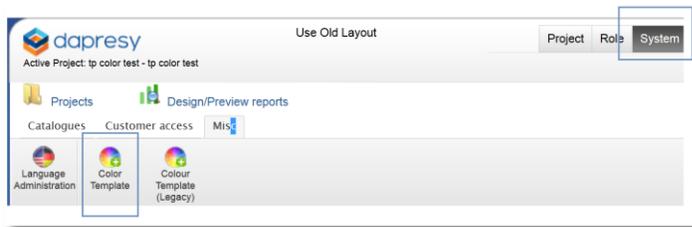
- Chapter 6.1 explains how to create and maintain the color templates in the Color template library
- Chapter 6.2 explains how to import a color template to a project and how to make changes on a project level
- Chapter 6.3 explains how to use the color templates in a project, how to connect a question, a text, an icon, etc. to a color placeholder
- Chapter 6.4 explains how the Report Template library and the Color templates integrate with each other

6.1 Color Template Library

In the Color template library, you create and edit the color templates that will be used in your projects. There is no connection between the color templates in the project and the Color template library, so changes in the library can be made without effecting any projects (and vice versa).

The new Color template library is located next to the old Color template library in the System/Misc. tab (see image below). The old library screen has been renamed, and is now "Color template (Legacy)."

The image below shows how to navigate to the Color template library.



In the Color template library page, you can create new templates and edit the existing ones.

The image below shows the Color template library page.



6.1.2 Create a New Color Template

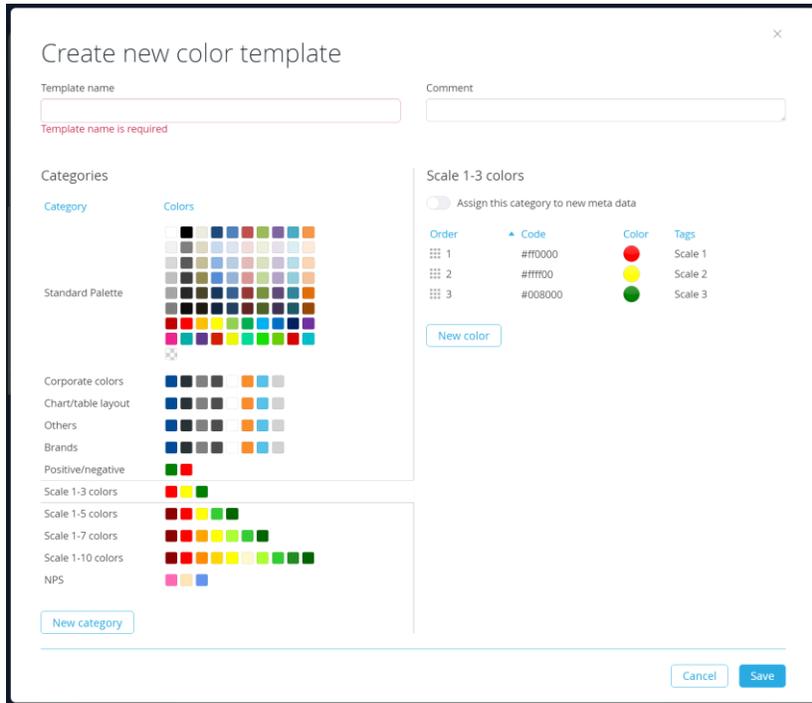
A color template consists of several categories, and each category contains a number of color placeholders. When creating a color template, a few categories are populated by default. Some of these can be deleted while others are mandatory and cannot be deleted (read the explanation why some categories cannot be deleted in chapter 6.4).

To create a new color template, click “Create new template” at the top of the page. A panel will then appear where you can:

- Name the template
- Enter a comment: why it was created, etc. (optional)
- Edit the colors of the desired color placeholders in the pre-defined categories and add new colors to the pre-defined categories
- Edit the sort order of the color placeholders
- Edit the tags of the color placeholders
- Create new categories

The image below shows the panel where you can create a color template. All categories are listed on the left. The top one is the “Standard Palette” and shows the standard colors used by the color picker to set a

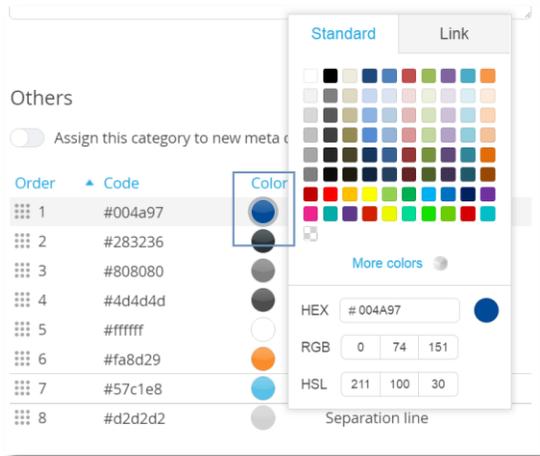
fixed color for an item. The other categories contain the color placeholders that are used when an item will be connected to the template.



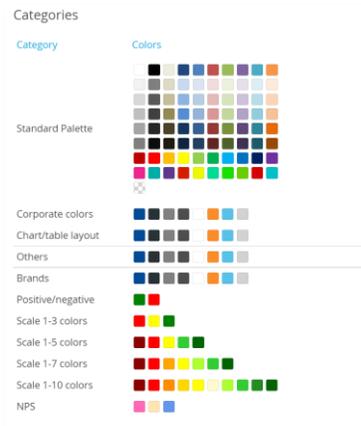
Note: Remember to SAVE when you are done with all the changes. The Save button is located in the lower right corner!

6.1.2.1 Edit a Color

To edit a color, simply click the corresponding color icon and edit the color in the color picker that appears.



The color picker can also be opened by double clicking directly on the desired color in the category list.



Note: Instead of setting a fixed color, you can link a color placeholder to another color placeholder. See more details in the next chapter.

6.1.2.1.1 Create Links Between Color Placeholders

Instead of setting a fixed color for each color placeholder, you can create links between color placeholders. This is very useful if several color placeholders will have the same or similar colors since the links can also include color adjustments.

The image below shows an example of when links can be useful. The shown category shows the Scale 1-7 color placeholders. Scale 1 has a fixed color while Scale 2 and a Scale 3 are linked to Scale 1. Pre-defined color adjustments have been set to get lighter versions of the source color.

The same goes for the green colors below. Scale 7 has a fixed color, while Scale 5 and 6 are linked to Scale 7 with color adjustments. If the fixed color in Scale 1 is updated, then Scale 2 and Scale 3 will be automatically updated and so on.

The image below shows a category where some colors have been linked. The Palette icon indicates that the color is a source color while the brush icon indicates that the color is based of another color.

Order	Code	Color	Tags
1	#8b0000		Scale 1
2	#f10000		Scale 2
3	#ff5858		Scale 3
4	#ffff00		Scale 4
5	#31ff31		Scale 5
6	#00ca00		Scale 6
7	#006400		Scale 7

These kinds of links can also be created between the categories so that the Scale 1-5 category and Scale 1-3 category could also be linked to, for example, Scale 1 and Scale 7 in the Scale 1-7 category.

You can hover over the palette icon to see which color placeholders are linked to it. All linked colors are rotated 45 degrees, as shown in the image below.

Categories

Category

Standard Palette

Corporate colors

Chart/table layout

Others

Brands

Positive/negative

Scale 1-3 colors

Scale 1-5 colors

Scale 1-7 colors

Scale 1-10 colors

NPS

Scale 1-7 colors

Assign this category to new meta data

Order	Code	Color	Tags
1	#8b0000		Scale 1 Delete
2	#f10000		Scale 2
3	#ff5858		Scale 3
4	#ffff00		Scale 4
5	#31ff31		Scale 5
6	#00ca00		Scale 6
7	#006400		Scale 7

To create a link, simply open the color picker of the desired color placeholder and enter the “link” tab. In the link tab, select which category and color placeholder it should be linked to. If any color adjustments need to be done, you can enter an adjusted HSL value (see image further down).

- H=Hue
- S= Saturation
- L= lightness

The image below shows the link tab. In this case, the color placeholder is linked to the placeholder Scale 1 in the Scale 1-7 category. If you look at the Adjustment section, you will see that the new color will be lighter since the Lightness value is increased by 20.



6.1.2.2 Add a New Color Placeholder

New colors can be added to a category by clicking the “New color” button (see image below). The new color is white by default. A category can have an unlimited amount of colors.

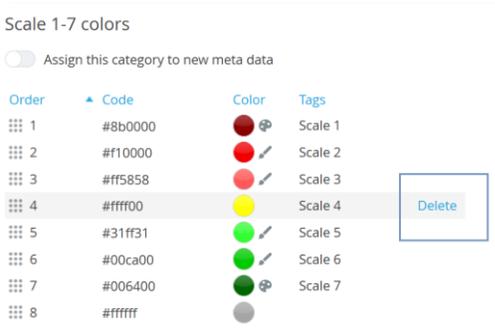
The image below highlights the “New color” option.



6.1.2.3 Delete a Color Placeholder

A color placeholder can be deleted by hovering your mouse over the color placeholder.

The image below shows the delete option which appears on mouse hover over.



6.1.2.3 Edit Tags of Color Placeholders

Each color placeholder can have tags that explain what kind of placeholder it is. These tags can easily be edited by double clicking on the tag.

The image below shows how to edit a tag. Just double click on the tag to edit.

Scale 1-7 colors

Assign this category to new meta data

Order	Code	Color	Tags
1	#8b0000		Scale 1
2	#f10000		Scale 2
3	#ff5858		Scale 3
4	#ffff00		Scale 4
5	#31ff31		Scale 5
6	#00ca00		Scale 6
7	#006400		Scale 7 <input type="text" value="Scale 7"/> Delete
8	#a5a5a5		

6.1.2.4 Edit Sort Order of Color Placeholders

You can easily rearrange the sort order of the color placeholders within a category by entering the desired sort order value or by dragging and dropping.

The image below shows the sort order edit field. Double click on the sort order value to open the edit field.

Scale 1-7 colors

Assign this category to new meta data

Order	Code	Color	Tags
1	#8b0000		Scale 1
2	#f10000		Scale 2
3	#ff5858		Scale 3
4	#ffff00		Scale 4
5	#31ff31		Scale 5
6	#00ca00		Scale 6
<input type="text" value="1"/>	#006400		Scale 7
8	#a5a5a5		

The image below shows how you can drag and drop to change the sort order of the color placeholders. To drag and drop a color placeholder, simply click the icon highlighted in the image below.

Order	Code	Color	Tags
1	#006400		Scale 7 Delete
2	#8b0000		Scale 1
3	#f10000		Scale 2
4	#ff5858		Scale 3
5	#ffff00		Scale 4
6	#31ff31		Scale 5 Delete
7	#00ca00		Scale 6
8	#a5a5a5		

6.1.2.5 Add New Category

A new category can be added by clicking the “New Category” button. A panel will open that will allow you to enter the name and number of colors for the new category.

The “New Category” button is highlighted in the image below.

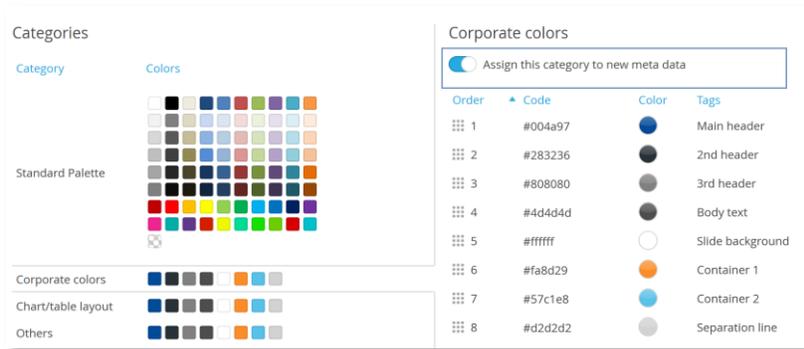


6.1.2.6 Select category to be assigned to new Meta data

When new Meta data is added to the project (via for example the data import, the compute variable page, the grouped answer page etc.), the new meta data will use the colors from the “Standard palette” category by default.

When setting up the color template, you can select if the colors will be picked from any other category. The option to select the category that will be assigned to new meta data is shown in the image below.

The image below shows the option that can be enabled if the selected category will be assigned to new meta data.



6.1.3 Edit a Color Template

To edit an existing color template, just hover your mouse over the template that you would like to edit in the Color Template list, and then click the Edit button. The edit process is the same as the creation process, which you can read about in chapter 6.1.2.1 to 6.1.2.6.

The image below shows how to open a color template in edit mode.



6.1.4 Delete a Color Template

To delete a color template, simply hover your mouse over the template in the color template list and click the “Delete” button that appears.

The image below shows how you can delete a color template.



Note: If you delete a color template, then the projects that use it will not be effected since there is no connection between the color template in the projects and within the library.

6.2 Color Template in Project

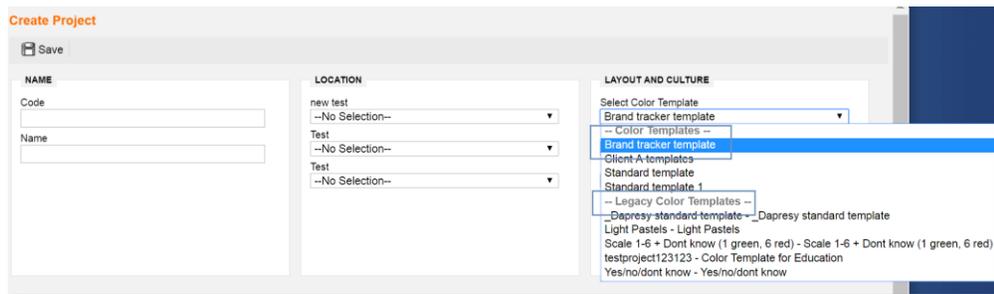
Each project has an assigned color template that is selected during the project creation. The template can also be changed at a later time or updated.

6.2.1 Select Template During Project Creation

During the project creation, the color template is selected in the same way as before. The list of color template selections consists of two parts: Color Templates (the new templates) and Legacy Color Templates (the old templates).

If you select a legacy template, then you cannot connect an item to a color placeholder and edit the colors used in the color picker etc., the old logic is still used. This is only possible if any of the new color templates are selected.

The image below shows the color template selection list that is available when creating a project. As shown, it contains both new and old color templates.



Note: If you have an old project but want to use the new color template logic, then you have to go the Project Settings page and select the “Use new color template logic” option (shown in image below). When this option is activated, the first available new color template will be assigned to your project. If you want to change the color template, you can do this in the color template screen (inside the project, see chapter 6.2.2).

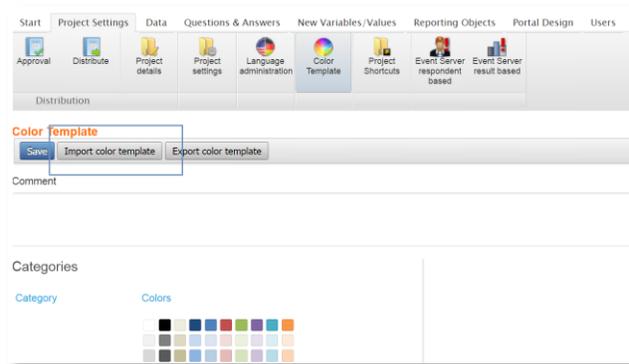


If your project is using the new color template logic but you want to use the old logic, then just untick the option “Use new color template logic,” and the old logic will be used once again.

6.2.2 Change Template in Project

If you want to change the color template in the project, simply go to the color template page and select the “Import Color template” option (shown image below). When selecting this option, you can select a new (or the same) Color template. This newly selected one will overwrite the existing template for the project.

The image below shows the import color template option. Use this option to change the color template of the project.



Note: If you import a new color template, then you will lose all changes that were made in the project. If you created new color placeholders and new categories in this project, then these will be lost when the new template is imported. If any items are connected to the deleted color placeholders/categories, then these items will still have the same color but it will be a “fixed” color instead of a linked color.

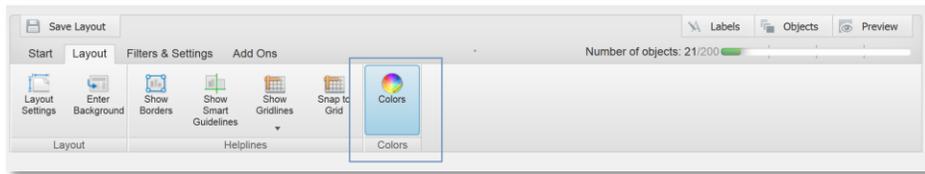
6.2.3 Edit Color Template in Project

The colors, tags, number of colors, sort order, etc. can be updated in the project. All updates in the project are only done on a project level so that the templates in the library will not be effected.

You can edit a color template in the color template page within the project. It is similar to editing in the color template library. See chapter 6.1.2.1 to 6.1.2.6 for more details.

The used color template can also be edited directly from the Storyteller and the Form report by clicking the Colors option in the ribbon menu, as shown in the image below.

The image below shows how to open the color template for editing in a Storyteller and Form report.



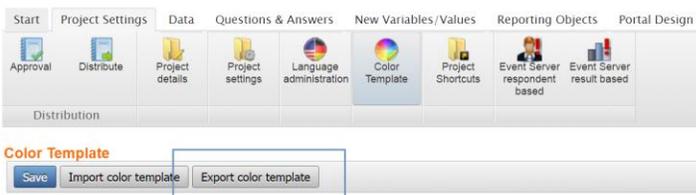
Note: If any items are connected to a deleted color placeholder, then these items will still have the same color but it will be a “fixed” color instead of a linked color.

6.2.4 Export Color Template from Project Back to Library

It is possible to export a color template in a project back to the color template library. This is useful if changes and updates have been made on a project level that you want to apply to the color template library.

In the color template page, the “Export color template” button can be found at the top (see image below). When selecting this option, you can choose to replace the existing color template in the library or create a new one in the library.

The image below shows the export button.

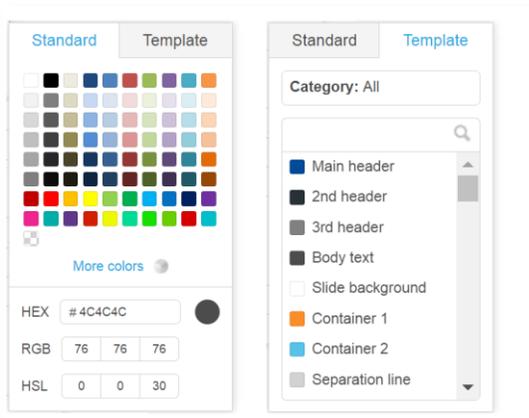


6.3 Assigning a Placeholder to an Item (question, icon, text etc.)

In projects that use the new color template logic, all objects such as questions, answers, icons, text objects, chart gridlines, chart backgrounds, cell backgrounds, etc. can be connected to the color placeholders. If an object is connected to a placeholder, then the maintenance becomes much more efficient as only the color placeholders needs to be updated if the colors have to be updated.

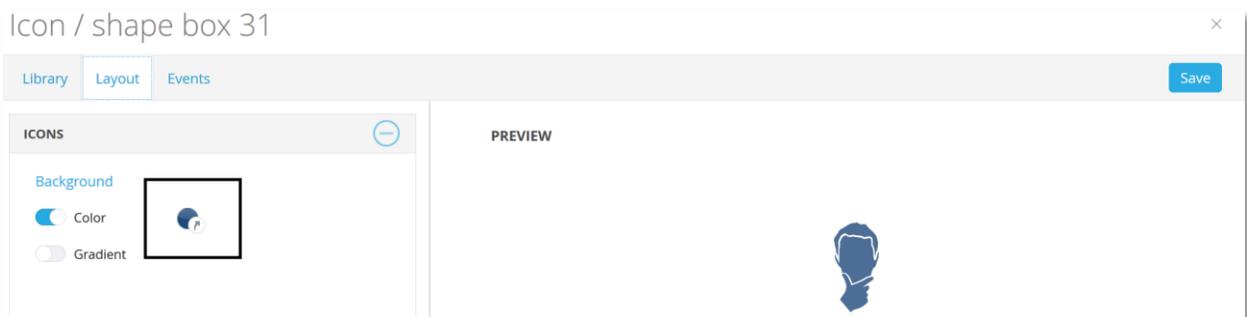
The connection to a color placeholder is made within the color picker that is used to edit the color of an item. The new color picker consists of two tabs. The first tab is used to set a fixed color (the same logic as before), and the second tab is used to connect an item to a color placeholder. If a color placeholder is selected, then the color of the item will be updated as soon as the color of the placeholder is updated.

The image below shows the two tabs in the color picker.



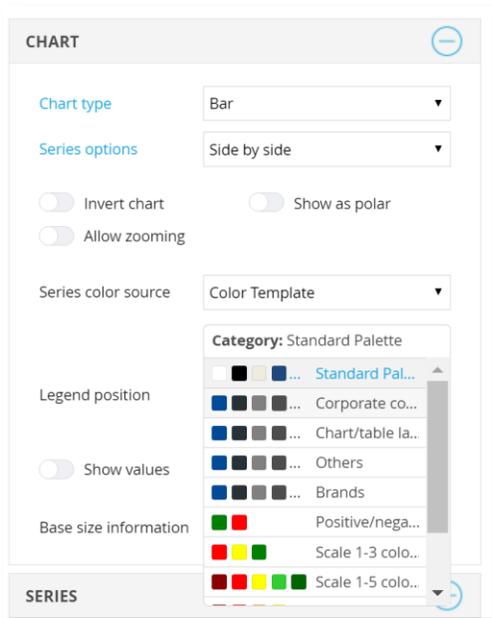
In the systems, you can easily see if an item is connected to a color placeholder. In the image below, you can see the icon that indicates if an item is connected to a color placeholder.

The image below shows the setup of an icon. In this case, the icon is connected to a color placeholder instead of a fixed color which can be seen on the highlighted icon.



6.3.1 Use of Categories in Charts

When setting up a chart, you can choose the colors that will be applied to the series in the chart. If the project uses the new color logic, then you can now select which category within the color template will be used when the color source is “Color template”. As shown in the image below, a second dropdown list appears when “Color Template” is selected in “Series color source.” This list shows all the available categories.

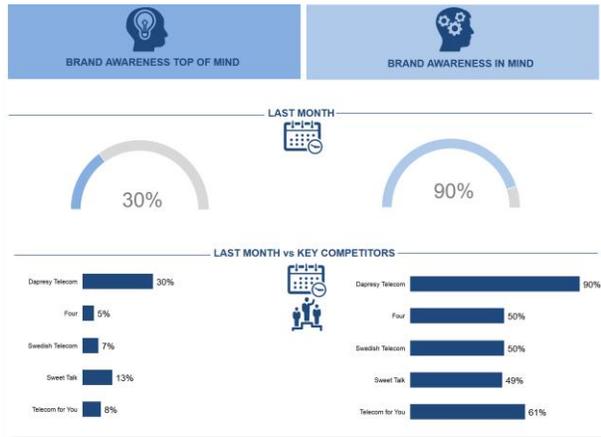


6.4 Color template and Report template library

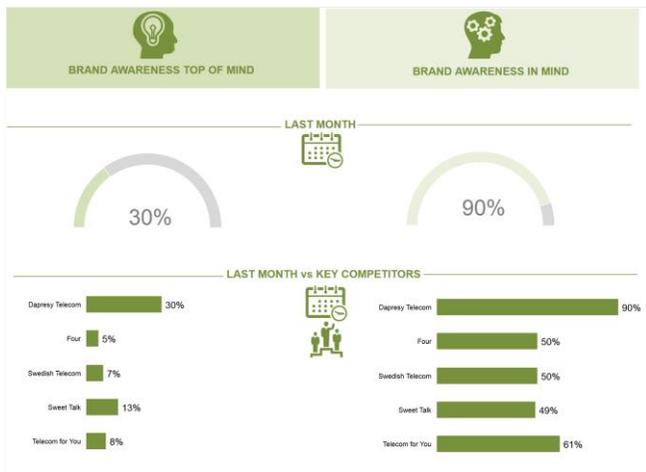
If an object is linked to a color placeholder and the object is saved into the Report Template library, then the link to the placeholder is saved as a part of the Report template. When the template is then imported into a project, the colors will be picked from the color template of the current project. The original colors will not be used. This means that an imported report template will immediately mimic the look and feel based on the color template of the current project.

The images below show two examples. If the user imports a Report template that looks like the first image below, then it could look like the second image after the import since the colors come from the color placeholder of the current project.

The image below shows the template in the Report Template library.



The image below shows the results after the import.



As mentioned in chapter 6.1.2, some of the categories in the color templates are mandatory and cannot be deleted (but the colors of these can of course be updated to fit your needs). The purpose of having these mandatory categories is so that Dapresy can fill the Report template library with predefined report templates so that these objects have the correct colors from the beginning. This reduces a lot of manual work and the need to correct the colors in the projects after an import from the Report template library.

Note: If you have an object that is linked to, for example, color placeholder X in project A which is stored in the report template library and then imported to project B (which does not have the color placeholder X), then it will get the original color since the corresponding placeholder does not exist.



To avoid these situations, we recommended that you only use the mandatory color categories/placeholders when setting up a project if you want to save items into the Report template library, as all these placeholders exist in all projects.

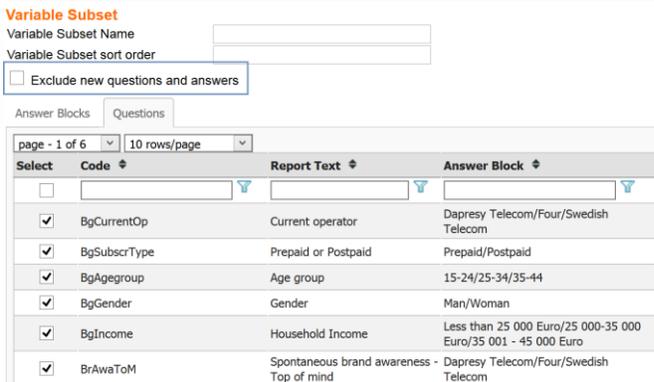
7 Administration Pages Updates

7.1 Variable Subset - Setting for Auto-Excluding New Meta Data

A new setting has been added to allow you to define the behavior of variable subsets when new questions and answers are added to the project. With this new setting you can now automatically exclude new meta data from the variable subset. Previously, new meta data was added to all existing variable subsets by default.

This new option is available at the top of the variable subset screen, as you can see in the image below. When the option “Exclude new questions and answers” is enabled, then no new meta data will automatically be added to this variable subset.

The image below shows the new option to exclude future meta data in a variable subset.



Variable Subset

Variable Subset Name

Variable Subset sort order

Exclude new questions and answers

Answer Blocks Questions

page - 1 of 6 10 rows/page

Select	Code	Report Text	Answer Block
<input type="checkbox"/>			
<input checked="" type="checkbox"/>	BgCurrentOp	Current operator	Dapresy Telecom/Four/Swedish Telecom
<input checked="" type="checkbox"/>	BgSubscrType	Prepaid or Postpaid	Prepaid/Postpaid
<input checked="" type="checkbox"/>	BgAgegroup	Age group	15-24/25-34/35-44
<input checked="" type="checkbox"/>	BgGender	Gender	Man/Woman
<input checked="" type="checkbox"/>	BgIncome	Household Income	Less than 25 000 Euro/25 000-35 000 Euro/35 001 - 45 000 Euro
<input checked="" type="checkbox"/>	BrAwaToM	Spontaneous brand awareness - Top of mind	Dapresy Telecom/Four/Swedish Telecom

Note: New meta data can be added to the project in the following pages. All of the following questions/answers are excluded from the existing variable subsets if the new setting is enabled:

- Manual data import
- Scheduled data import
- Compute variables
- Merged variables
- Grouped answers
- Index questions
- Input variables
- Weight variables

7.2 Setup Improvements in Question Block-, Merged Variables- and Index Page to Automatically Include Future Questions

A new improvement has been made to Question Block setup, Merged variable setup, and the Index setup which allows you to automatically define the content of these items based on the question codes, rather than manually selecting which will be included. This logic covers all existing questions as well as all future questions so you will not need to edit the Question Blocks, Merged Variables and Indexes when any new meta data is added to the project.

This auto-creation is based off of the question code structure. Therefore, the code must be similar for all questions that will be included in the same Question Block, Merged variable, or Index.

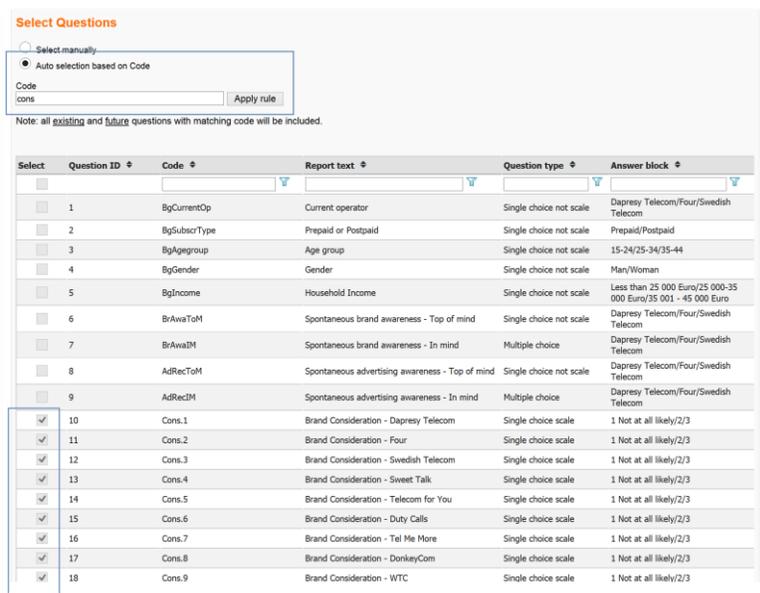
7.2.1 Setup

In the Question Block, Merged Variable, and Index pages you can now define if the selection of the ingoing questions will be done manually or automatically based on codes.

- Manually - This is done the same as before, by ticking the questions to be included
- Automatically – This means that a code is entered, and then all matching questions will be automatically included. This includes all existing questions as well as future questions.

The image below shows the new logic. In this example, all questions that have “cons” in the question code are automatically added to the Question block.

The image below highlights the new setup option.



Select	Question ID	Code	Report text	Question type	Answer block
<input type="checkbox"/>	1	BgCurrentOp	Current operator	Single choice not scale	Dapresy Telecom/Four/Swedish Telecom
<input type="checkbox"/>	2	BgSubscrType	Prepaid or Postpaid	Single choice not scale	Prepaid/Postpaid
<input type="checkbox"/>	3	BgAgegroup	Age group	Single choice not scale	15-24/25-34/35-44
<input type="checkbox"/>	4	BgGender	Gender	Single choice not scale	Man/Woman
<input type="checkbox"/>	5	BgIncome	Household Income	Single choice not scale	Less than 25 000 Euro/25 000-35 000 Euro/35 001 - 45 000 Euro
<input type="checkbox"/>	6	BrAwatM	Spontaneous brand awareness - Top of mind	Single choice not scale	Dapresy Telecom/Four/Swedish Telecom
<input type="checkbox"/>	7	BrAwatM	Spontaneous brand awareness - In mind	Multiple choice	Dapresy Telecom/Four/Swedish Telecom
<input type="checkbox"/>	8	AdRecToM	Spontaneous advertising awareness - Top of mind	Single choice not scale	Dapresy Telecom/Four/Swedish Telecom
<input type="checkbox"/>	9	AdRecToM	Spontaneous advertising awareness - In mind	Multiple choice	Dapresy Telecom/Four/Swedish Telecom
<input checked="" type="checkbox"/>	10	Cons.1	Brand Consideration - Dapresy Telecom	Single choice scale	1 Not at all likely/2/3
<input checked="" type="checkbox"/>	11	Cons.2	Brand Consideration - Four	Single choice scale	1 Not at all likely/2/3
<input checked="" type="checkbox"/>	12	Cons.3	Brand Consideration - Swedish Telecom	Single choice scale	1 Not at all likely/2/3
<input checked="" type="checkbox"/>	13	Cons.4	Brand Consideration - Sweet Talk	Single choice scale	1 Not at all likely/2/3
<input checked="" type="checkbox"/>	14	Cons.5	Brand Consideration - Telecom for You	Single choice scale	1 Not at all likely/2/3
<input checked="" type="checkbox"/>	15	Cons.6	Brand Consideration - Duty Calls	Single choice scale	1 Not at all likely/2/3
<input checked="" type="checkbox"/>	16	Cons.7	Brand Consideration - Tel Me More	Single choice scale	1 Not at all likely/2/3
<input checked="" type="checkbox"/>	17	Cons.8	Brand Consideration - DonkeyCom	Single choice scale	1 Not at all likely/2/3
<input checked="" type="checkbox"/>	18	Cons.9	Brand Consideration - WTC	Single choice scale	1 Not at all likely/2/3