

The Forsta logo is displayed on a white rectangular background. It features a pink icon and the word "Forsta" in dark blue.

Getting Started with Forsta Visualizations

About Forsta

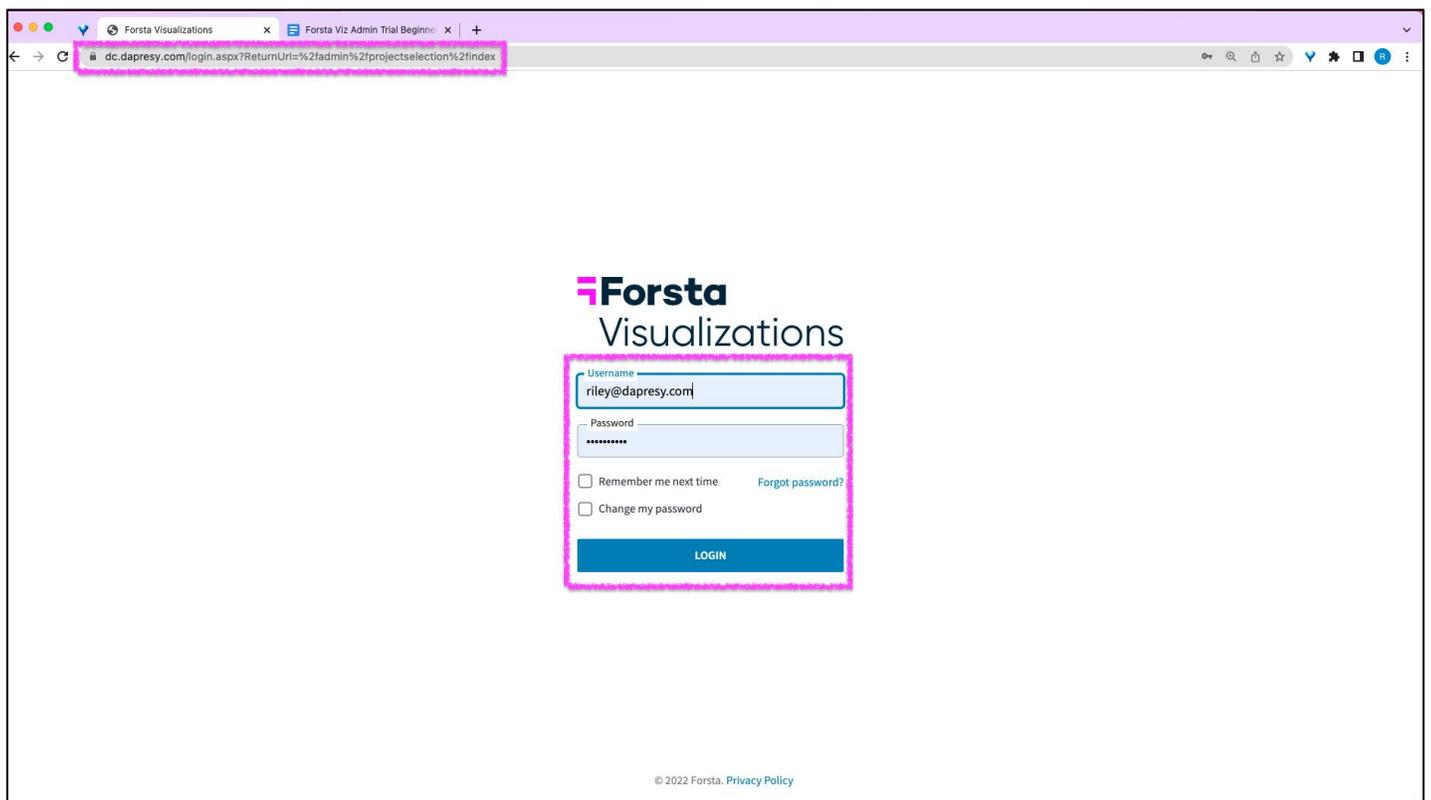
Forsta is the new frontier of Customer Experience and Market Research Technology. Formed in 2021 via the merger of industry leaders Confirmit and FocusVision, our global company powers the richest and most comprehensive set of research and insights solutions, spanning CX, enterprise feedback management, VoC, VoE, Qual, Quant, Data Visualization and more. Forsta's extensive set of market-leading tools, including the award-winning Dapresy data visualization and reporting suite, combined with the expert guidance of our seasoned data and insights professionals, empower decision-makers to drive business impact based on truly deeper customer understandings. Founded in the Nordics, Forsta means "to understand" in Swedish. Visit www.Forsta.com for more information.

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Logging into Forsta Visualizations

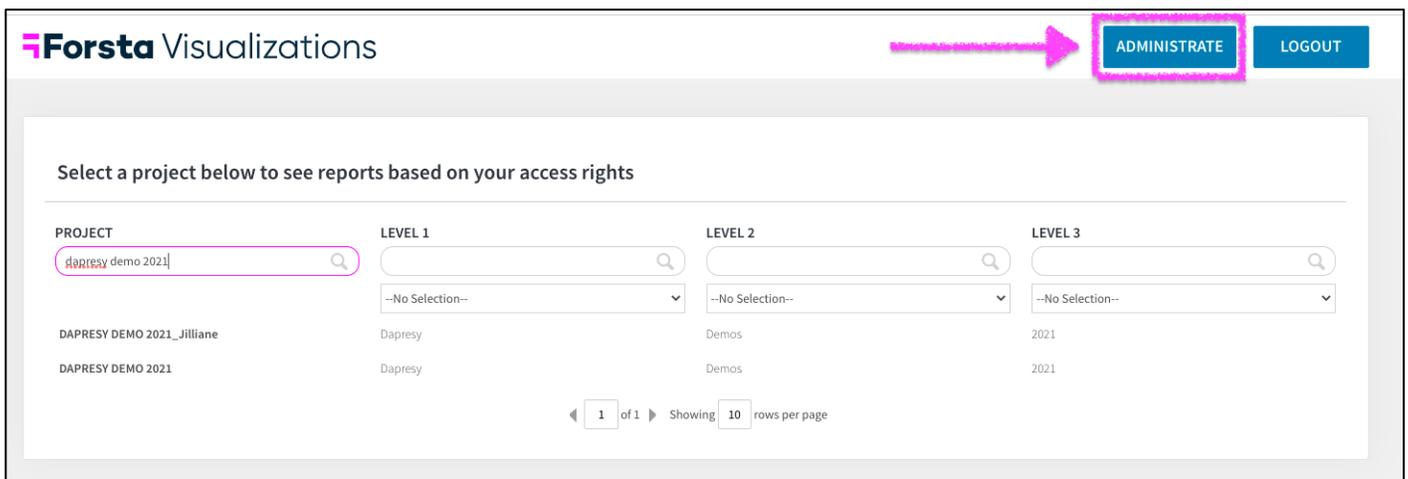
- Access Forsta Visualizations by navigating to the URL provided to you
- Input the username that was provided to you
- Set your own password upon login, by following these steps:
 - a) Click “Forgot Password” on the login page.
 - b) Enter your username into the field that displays on the “Forgot Password” page
 - c) The system will send an email with a link to reset/create your password. If you don’t see the email within a few minutes, please check your other/spam/junk folder(s)



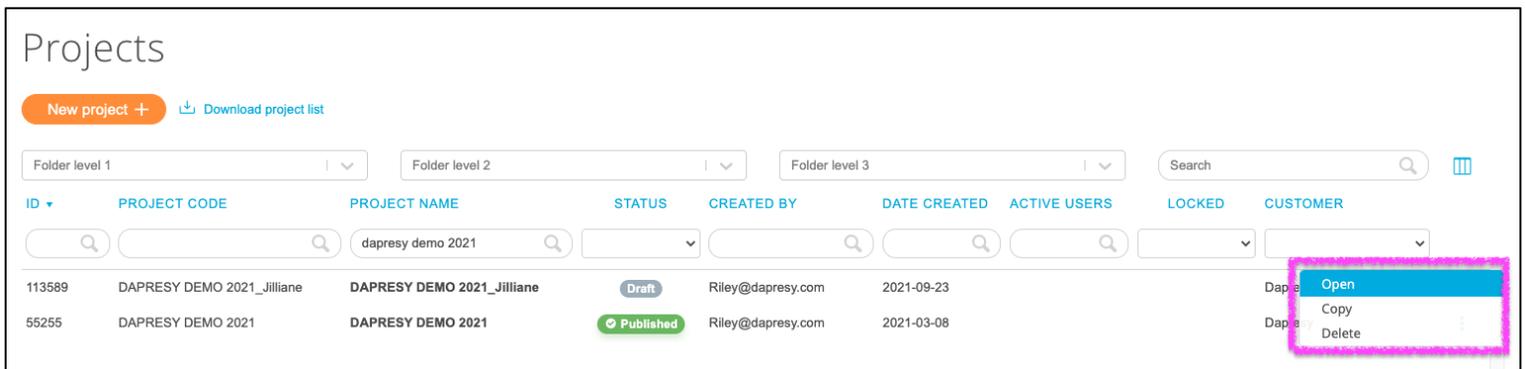
Accessing a Forsta Visualizations Project

Easily review your survey and check each question for errors before it goes live. Use the survey testing system to check logic, skip paths, question settings and text.

- When you first log in, you will be brought to your Project Selection page where you will see a list of your distributed or “live” projects. If you click into one of these projects, you will be brought to the reporting side of the project
- To access the “back end” of Forsta Visualizations, click the Administrate button in the top right corner



- Clicking the Administrate button brings you to a list of all projects, both distributed and undistributed, and from here, you can click into a project to access the back end
- This is also where you can choose to Copy or Delete projects by clicking the three dots on the far right



Variable Administration

- Once you click into a project, the tool bar at the top of the project shows you all the different functions and modules that can be accessed in Forsta Visualizations.
- Most of your time will be spent in the “Questions” page.

The screenshot shows the Forsta Visualizations interface. At the top, there's a navigation bar with 'Project', 'Admins/Customers', and 'System settings' tabs. Below that, a secondary bar contains 'Projects', 'Design/Preview reports', and a search icon. The main navigation bar includes 'Start', 'Project Settings', 'Data', 'Questions & Answers', 'Reporting Objects', 'Portal Design', and 'Users'. The 'Questions' menu item is highlighted with a pink box. Below the navigation, the 'Questions' page is active, showing a 'Save' button, a 'Create new variable' button, and a 'Meta data processing template' button. A search bar is present with options for 'Search and Replace texts', 'Color', 'Deactivate', and 'Question blocks'. Below the search bar, there's a 'Select All' button and '0 selected' text. The main content is a table of variables:

ORD...	CODE	TEXT	TYPE	COLOR	ANSWER BLOCK	FILTER	FILTER TEXT
1	> Country	BgCountry	Single	Orange	United States/Canada	Y	
2	> City	BgCity	Single	Teal	Boston/Chicago/Los Angeles	Y	
3	> BgSubscrType	Prepaid or Postpaid	Single	Purple	Prepaid/Postpaid	Y	
4	> BgAgegroup	Age group	Single	Green	15-24/25-34/35-44	Y	
5	> BgGender	Gender	Single	Red	Male/Female	Y	
6	> BgIncome	Household Income	Single	Blue	Less than 25 000/25 000-35 000 Euro/35 001 - ...	Y	
7	> BrAwaToM	Brand awareness Top of mind	Single	Dark Blue	Dapresy Telecom/Four/Swedish Telecom	Y	
8	> BrAwaIM	Brand awareness In mind	Multi	Light Blue	Dapresy Telecom/Four/Swedish Telecom	Y	
9	> AwaAdRecToM	Advertising awareness Top of mind	Single	Black	Dapresy Telecom/Four/Swedish Telecom	Y	
10	> AwaAdRecIM	Spontaneous advertising awareness - In mind	Multi	White	Dapresy Telecom/Four/Swedish Telecom	Y	
11	> Cons1	Brand Consideration - Dapresy Telecom	Single	Light Orange	1 Not at all likely/2/3	Y	
12	> Cons2	Brand Consideration - Four	Single	Light Blue	1 Not at all likely/2/3	Y	

Global Text Changes

- Double click into any of the question labels in the “Text” column to make manual text edits

The screenshot shows the Forsta interface with the 'Questions' table. The 'Search and Replace texts' button is highlighted with a pink box. The table has columns for ORD..., CODE, TEXT, TYPE, COLOR, ANSWER BLOCK, FILTER, and FILTER TEXT. The first row is selected, showing 'Country' with code 'BgCountry', type 'Single', and answer block 'United States/Canada'.

ORD...	CODE	TEXT	TYPE	COLOR	ANSWER BLOCK	FILTER	FILTER TEXT
1	BgCountry	BgCountry	Single	Orange	United States/Canada	Y	
2	BgCity	BgCity	Single	Teal	Boston/Chicago/Los Angeles	Y	
3	BgSubscrType	Prepaid or Postpaid	Single	Purple	Prepaid/Postpaid	Y	
4	BgAgegroup	Age group	Single	Green	15-24/25-34/35-44	Y	
5	BgGender	Gender	Single	Red	Male/Female	Y	

- Also, use the “Search and Replace Texts” function to bulk select multiple variables and change or remove repeating text elements

Edit Answer Options and Create Nets

- Click into any of the answer options in the “Answer Block” column to open your Answer window
- Make changes to your answer labels by double clicking into the text in the “Answer Text” column or use the “Search and Replace Texts” function to bulk select multiple answers and change or remove repeating text elements
- Change the order of your answers by dragging and dropping or typing in the numeric order in the “Order column”
- Change colors

Questions

Save Create new variable Meta data processing template

Search and Replace texts Color Deactivate Question blocks

Select All 0 selected

ORD...	CODE	TEXT	TYPE	COLOR	ANSWER BLOCK	FILTER	FILTER TEXT
1	> Country	BgCountry	☞ Single	Orange	United States/Canada	Y	
2	> City	BgCity	☞ Single	Teal	Boston/Chicago/Los Angeles	Y	
3	> BgSubscrType	Prepaid or Postpaid	☞ Single	Purple	Prepaid/Postpaid	Y	
4	> BgAgegroup	Age group	☞ Single	Green	15-24/25-34/35-44	Y	
5	> BgGender	Gender	☞ Single	Red	Male/Female	Y	
6	> BgIncome	Household Income	☞ Single	Blue	Less than 25 000/25 000-35 000 Euro/35 001 - ...	Y	
7	> BrAwaToM	Brand awareness Top of mind	☞ Single	Dark Blue	Dapresy Telecom/Four/Swedish Telecom	Y	
8	> BrAwaIM	Brand awareness In mind	☞ Multi	Light Blue	Dapresy Telecom/Four/Swedish Telecom	Y	
9	> AwaAdRecToM	Advertising awareness Top of mind	☞ Single	Black	Dapresy Telecom/Four/Swedish Telecom	Y	
10	> AwaAdRecIM	Spontaneous advertising awareness - In mind	☞ Multi	White	Dapresy Telecom/Four/Swedish Telecom	Y	
11	> Cons1	Brand Consideration - Dapresy Telecom	☞ Single	Light Orange	1 Not at all likely/2/3	Y	
12	> Cons2	Brand Consideration - Four	☞ Single	Light Blue	1 Not at all likely/2/3	Y	
13	> Cons3	Brand Consideration - Swedish Telecom	☞ Single	Light Purple	1 Not at all likely/2/3	Y	

Answer Block 1 Not at all likely/2/3 ✎

Cons1 - Brand Consideration - Dapresy Telecom

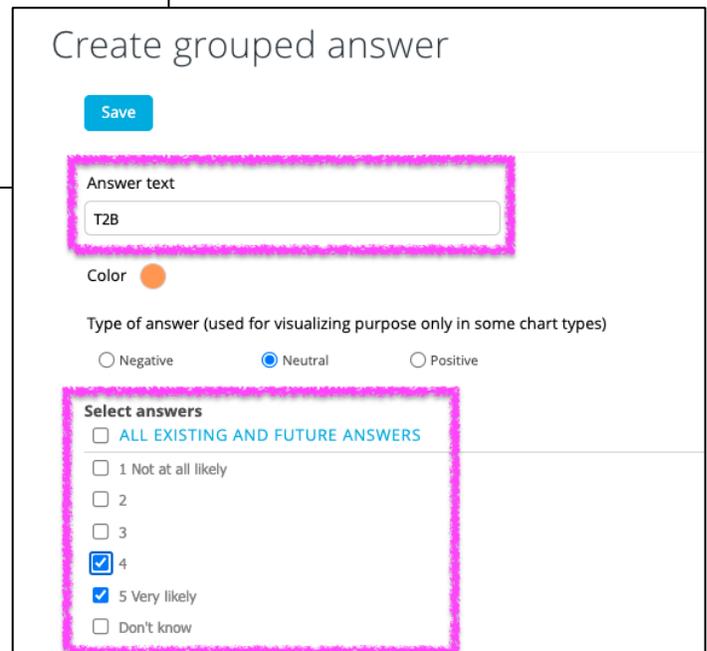
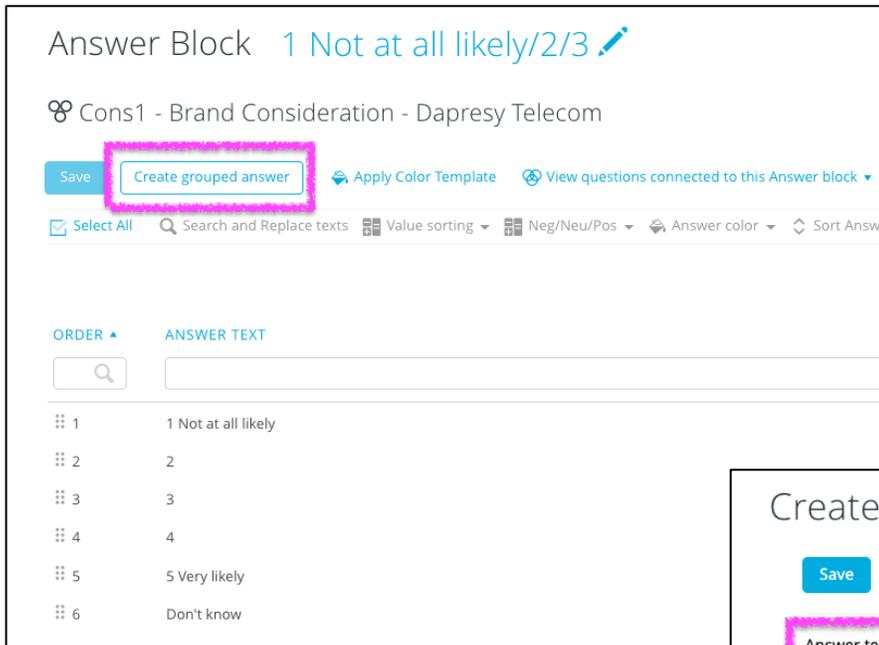
Save Create grouped answer Apply Color Template View questions connected to this Answer block

Select All Search and Replace texts Value sorting Neg/Neu/Pos Answer color Sort Answers

ORDER	ANSWER TEXT	ID	COLOR	EXCLUDE FROM PERCENTAGE	VALUE SORTING
1	1 Not at all likely	1	Orange	✕	Sortable group 1
2	2	2	Teal	✕	Sortable group 1
3	3	3	Purple	✕	Sortable group 1
4	4	4	Green	✕	Sortable group 1
5	5 Very likely	5	Red	✕	Sortable group 1
6	Don't know	6	Blue	✕	Sortable group 1

Create Nets

- Within the answer window you can also create nets by clicking “Create Grouped Answer”, give your net a label, and check off which answers should compose the net



- Shared Answer Blocks
 - Forsta Visualizations groups questions together that share the same answer blocks - meaning a change you make once, will apply to every question that uses the same answer list

Assign Colors

- Colors can be assigned to questions or answers. To change a color assigned to a question, click the color next to the variable from the Questions page. To change a color assigned to an answer, click the color next to the answer option from the Answer block window. Choose from standard colors or from the color templates option.

Questions

Save Create new variable Meta data processing template

Search and Replace texts Color Type Set as filters Deactivate Question blocks

Select All 1 of 52 selected

ORD...	CODE	TEXT	TYPE	COLOR	FILTER	FILTER TEXT
1	Country	BgCountry	Single			
2	City	BgCity	Single			
3	BgSubscrType	Prepaid or Postpaid	Single			
4	BgAgegroup	Age group	Single			
5	BgGender	Gender	Single			
6	BgIncome	Household Income	Single			
7	BrAwaToM	Brand awareness Top of mind	Single			
8	BrAwaIM	Brand awareness In mind	Multi			
9	AwaAdRecToM	Advertising awareness Top of mind	Single			
10	AwaAdRecIM	Spontaneous advertising awareness - In mind	Multi			
11	Cons1	Brand Consideration - Dapresy Telecom	Single			
12	Cons2	Brand Consideration - Four	Single			

Standard Template

More colors

HEX # F79647

RGB 247 150 71

HSL 27 92 62

Dapresy Telecom/Four/Swedish Telecom

Dapresy Telecom/Four/Swedish Telecom

Dapresy Telecom/Four/Swedish Telecom

Dapresy Telecom/Four/Swedish Telecom

1 Not at all likely/2/3

1 Not at all likely/2/3

Create Color Templates

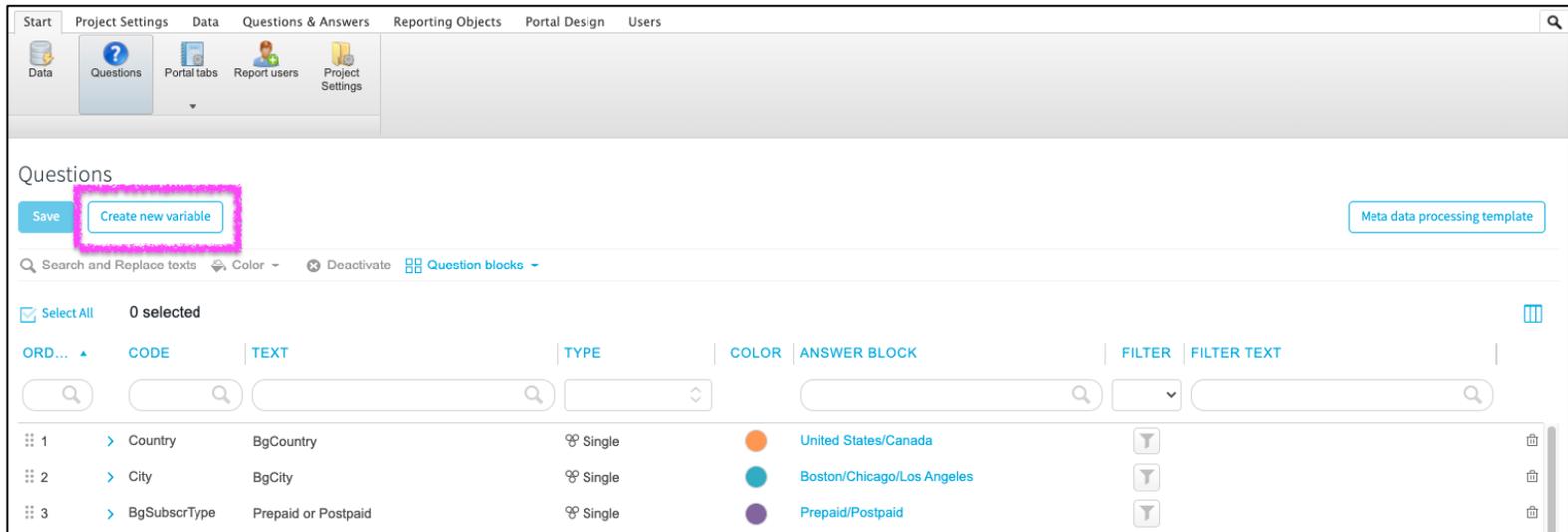
- To create or edit your color template, go to the “Project Settings tab”, and click into “Layouts and Formats” and “Color Templates”
- Change existing colors in the template or add in new groups or categories of colors
- Click [here](#) to learn more about color management

The screenshot shows the Forsta Project Settings interface. The top navigation bar includes 'Start', 'Project Settings', 'Data', 'Questions & Answers', 'Reporting Objects', 'Portal Design', and 'Users'. The 'Project Settings' icon is highlighted with a pink box. The main content area is titled 'Project Settings' and features a left-hand navigation menu with categories like 'Performance', 'Hierarchical and Optional filters', 'Layouts and Formats', 'Calculation and Results', 'Exports', 'Access rights', 'Events and Forms', 'Email sender address', 'Security settings', 'Custom code', 'Project name and location', and 'Linked projects'. The 'Layouts and Formats' category is selected, and within it, 'Color templates' is highlighted with a pink box. A 'Save' button is located at the top right of the settings area. The 'COLOR TEMPLATES' section includes 'Import color template' and 'Export color template' buttons. Below this is a 'Categories' section with a table listing categories and their associated colors. A 'New category' button is highlighted with a pink box at the bottom. To the right of the categories is a 'Colors' palette with a grid of color swatches. A pink box highlights a specific color swatch in the palette.

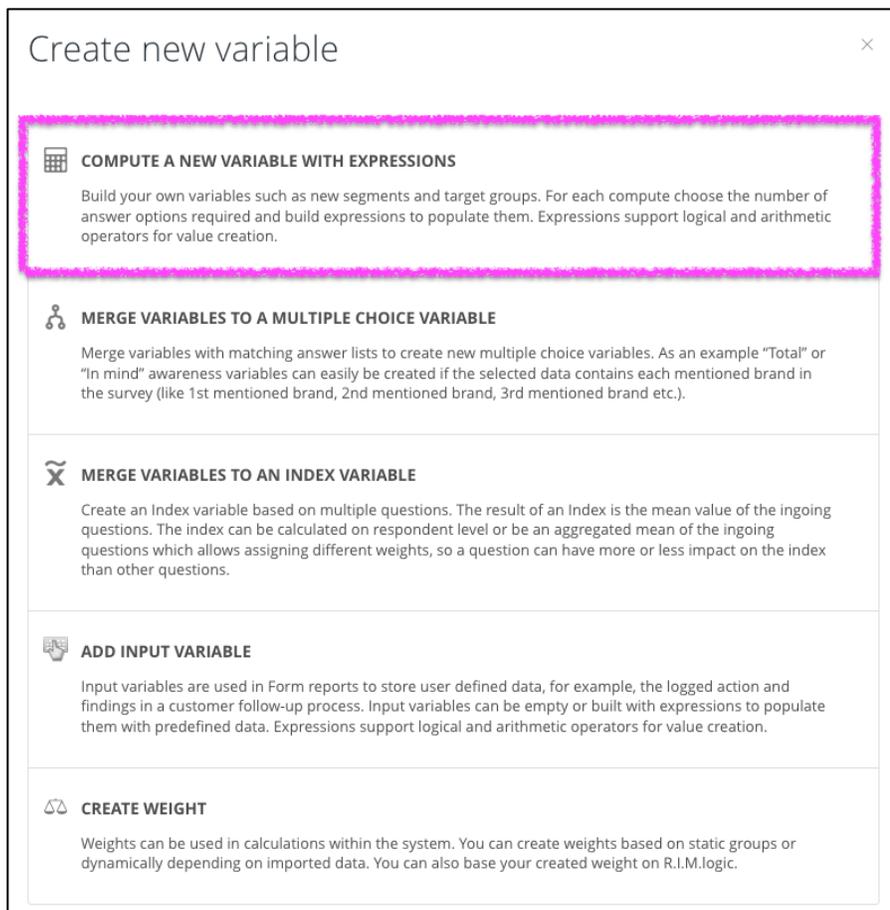
Order	Category	Colors
1	Standard Palette	[Color swatches]
2	Corporate colors	[Color swatches]
3	Layout elements	[Color swatches]
4	Others (Regions, Countries, etc.)	[Color swatches]
5	Positive/negative	[Color swatches]
6	NPS/Scale 1-3	[Color swatches]
7	Scale 1-5	[Color swatches]
8	Scale 1-10	[Color swatches]

Create New Variables

- Create a new variable by clicking “Create new variable” at the top of the Questions page



- This brings you to a window that shows the different options available for creating new variables



- The option “Compute a new variable using expressions” allows you to create a new variable based on custom defined expressions and is the most used option. Follow the steps below to create a new variable using this method:
 - “Define answers” tab is where you will give the new variable a code, a name, choose how many answers it should have, and define the answer labels

Compute a new variable with expressions ×

Save

Define answers Define calculations

Code Segment	Question text Segment
Type Single choice scale	Number of answer alternatives 2

Color ●

Sort alphabetically
Apply Color Category No selection Use linked color

	ID	ANSWER TEXT	EXCLUDE	FACTOR	VALUE SORTING	EXCLUDE	EXCLUDE	NEGATIVE	NEUTRAL	POSITIVE	COLOR
			AVG	AVG		FROM	FROM				
						PERCENTAGE	RANK				
⌵	<input type="checkbox"/>	1 Young Males	<input type="checkbox"/>	1	Sortable group 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	●
⌶	<input type="checkbox"/>	2 Young Females	<input type="checkbox"/>	2	Sortable group 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	●
⌷											
⌸											
⌹											
⌺											

- “Define calculations” tab is where you will define the expressions for each of your answer options
 1. Select the answer option from the dropdown
 2. Select the radio button next to each variable
 3. Select the answers from the answer list that displays in the middle and click “Add to expression”
 4. The expression box can be typed into via the keyboard or the buttons under the “Operator & Functions” sections can be used
 5. Standard Boolean Logic is used to set expressions
 6. “Validate” can be used to ensure there are no errors in the expression
 7. Click “Save”

Compute a new variable with expressions

Define answers: **Define calculations**

Answer alternative: 1 - Young Males

Imported Variables Computed Variables

Variables

CODE	QUESTIONS
<input type="radio"/>	Country
<input type="radio"/>	City
<input type="radio"/>	BgSubscrType
<input type="radio"/>	BgAgegroup
<input checked="" type="radio"/>	BgGender
<input type="radio"/>	BgIncome
<input type="radio"/>	BrAwaToM
<input type="radio"/>	BrAwaIM
<input type="radio"/>	AwaAdRecToM
<input type="radio"/>	AwaAdRecIM
<input type="radio"/>	Cons1

Answers

- 1 - Male
- 2 - Female

Operators & Functions

AND, OR, NOT, (,), +, -, *, /, =, LIKE, >, <, Apply Function

Expression

ø4-Age group=('1 - 15-24,2 - 25-34')ø AND ø5-Gender=('1 - Male')ø

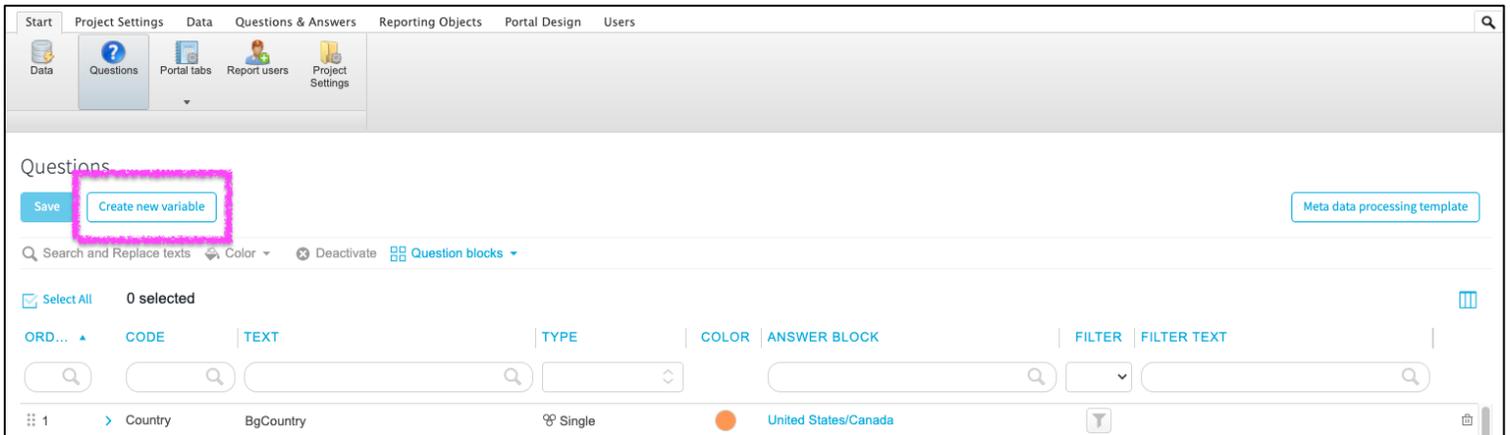
Respondent Count: 581 (unweighted)

Clear Validate

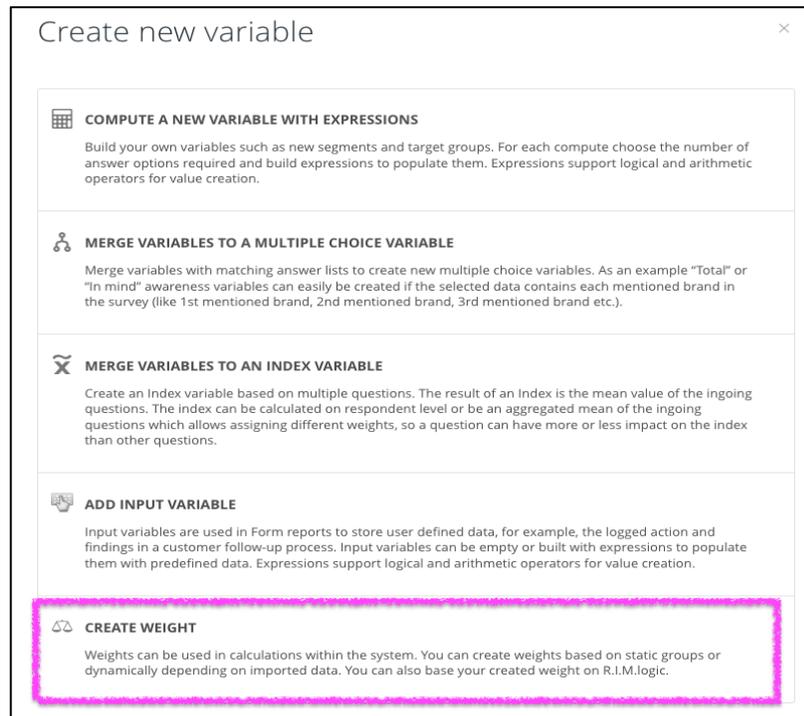
- Click [here](#) to learn more about variable creation

Create Weights

- To add a new weight, start by clicking "Create new variable" at the top of the Questions page



- This brings you to a window that shows the different options available for creating new variables



- "Create Weight" brings you to a window where you can create a new weight using either standard target weighting or RIM weighting methodology. Follow the steps below to create weights using this method:

1. Give your new weight variable a code and name, chose the weighting methodology you want used, and fill out the according fields
2. Search the list of variables and choose which variable should be added to the weight table
3. Once added to the weight table, you can assign the target percent

Create Weight

[Save](#)

Code: Name:

SETTINGS

Method:

Weight within: Target tolerance (%): Automatic rescaling: Rescale Target values during the weight calculation, if respondent count is zero

[SELECT VARIABLES](#)

SELECT VARIABLES

QUESTION CODE QUESTION TEXT

BgGender	Gender	Add to weight table	Add as filter
BgIncome	Household Income		
OSAT	Overall Satisfaction		
BgSubscrType	Prepaid or Postpaid		
q25Num3TelMeMore	Tel Me More has good coverage		
q25Num6TelMeMore	Tel Me More has good customer service		

DEFINE TARGET DISTRIBUTIONS

Rescale Target values if the sum is not equal to 100%

	Current (%)	Target (%)
Male	51.02	<input type="text" value="50"/>
Female	48.98	<input type="text" value="50"/>
Sum (%)	100	<input type="text" value="100"/>

- Search the list of variables and choose which variables should be added to the weight table as Filters which allows you to set unique target percent per filter option

SELECT VARIABLES

QUESTION CODE QUESTION TEXT

All ▾

AwaAdRecToM	Advertising awareness Top of mind	
BgAgegroup	Age group	
City	BgCity	
Country	BgCountry	Add to weight table Add as filter
BrAwaToM	Brand awareness Top of mind	
Cons1	Brand Consideration - Dapresy Telecom	

DEFINE TARGET DISTRIBUTIONS

Rescale Target values if the sum is not equal to 100%

	Filter: BgCountry			
	United States		Canada	
	Current (%)	Target (%)	Current (%)	Target (%)
Male	50.59	<input type="text" value="50"/>	51.36	<input type="text" value="50"/>
Female	49.41	<input type="text" value="50"/>	48.64	<input type="text" value="50"/>
Sum (%)	100	100	100	100

- Click [here](#) to learn more about weighting

Apply Filters

- Any single choice or multiple-choice question can be applied as a filter by clicking the filter icon in the “Filters” column
- Questions imported as open-end or open-numeric variable types cannot be used as filters

Questions

Save Create new variable Meta data processing template

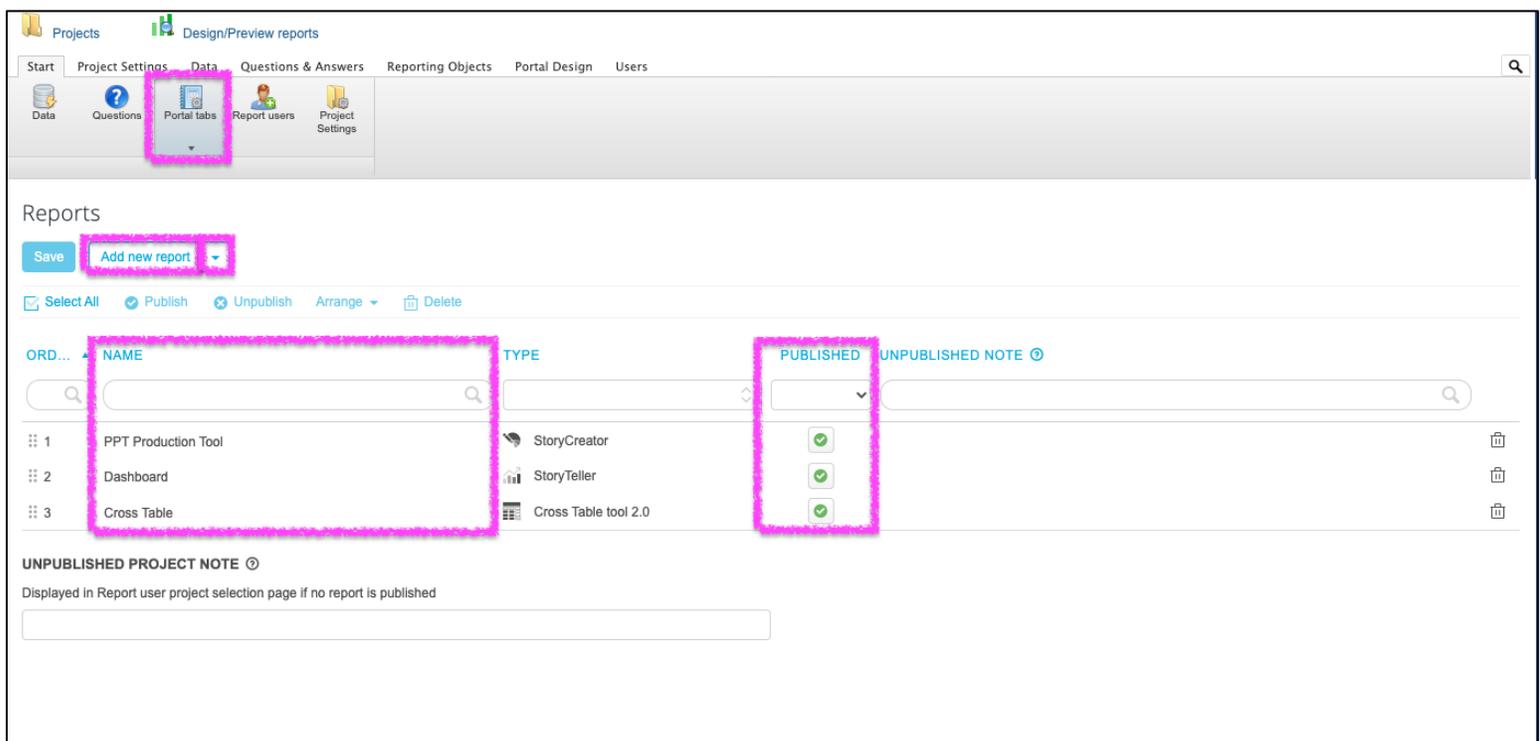
Search and Replace texts Color Type Remove as Filter Deactivate Question blocks

Select All 1 of 52 selected

ORD...	CODE	TEXT	TYPE	COLOR	ANSWER BLOCK	FILTER	FILTER TEXT
1	Country	BgCountry	Single	United States/Canada			BgCountry
2	City	BgCity	Single	Boston/Chicago/Los Angeles			BgCity
3	BgSubscrType	Prepaid or Postpaid	Single	Prepaid/Postpaid			
4	BgAgegroup	Age group	Single	15-24/25-34/35-44			Age group
5	BgGender	Gender	Single	Male/Female			Gender
6	BgIncome	Household Income	Single	Less then 25 000/25 000-35 000 Euro/35 00...			Household Income
7	BrAwaToM	Brand awareness Top of mind	Single	Dapresy Telecom/Four/Swedish Telecom			

Add Portal Tabs

- From the back-end toolbar you can also access Portal Tabs, which is where you can choose to add different reporting modules to your Forsta Visualizations project
 - The three main reporting modules in Forsta Visualizations are StoryTeller (dashboard), StoryCreator (PPT tool), and online Cross Tables Report
 - Add a new report by clicking the dropdown arrow next to “Add new report”
 - For a more detailed description on each of the reporting types, click the “Add New Report” button



The screenshot shows the Forsta back-end interface. At the top, there is a navigation bar with tabs: Start, Project Settings, Data, Questions & Answers, Reporting Objects, Portal Design, and Users. The 'Data' tab is active, and the 'Portal tabs' icon is highlighted with a pink box. Below the navigation bar, there is a 'Reports' section. In this section, the 'Add new report' dropdown button is highlighted with a pink box. Below the button, there is a table with the following columns: ORD..., NAME, TYPE, PUBLISHED, and UNPUBLISHED NOTE. The 'PUBLISHED' column contains green checkmarks, and this column is highlighted with a pink box. The table lists three reports: 'PPT Production Tool' (StoryCreator), 'Dashboard' (StoryTeller), and 'Cross Table' (Cross Table tool 2.0). Below the table, there is an 'UNPUBLISHED PROJECT NOTE' field with a text input area.

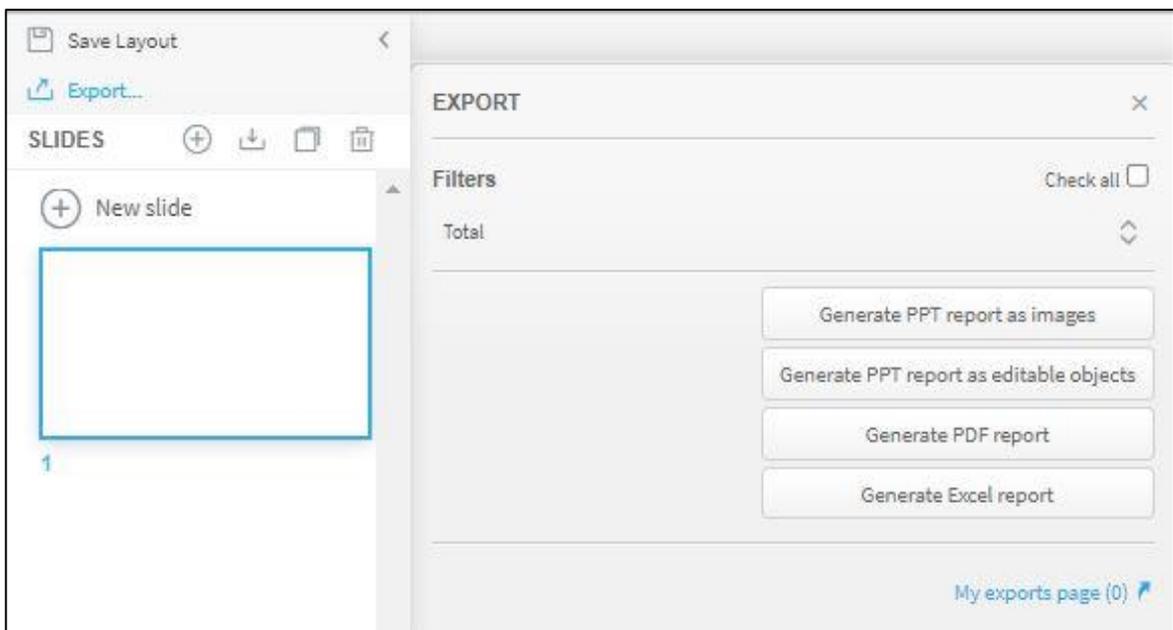
- Click [here](#) to learn more about Portal Tabs

Front End StoryTeller (Dashboard)

- From the back-end, to access the “front-end” of Forsta Visualizations, where you build your reports, click the “Design/Preview Reports” button

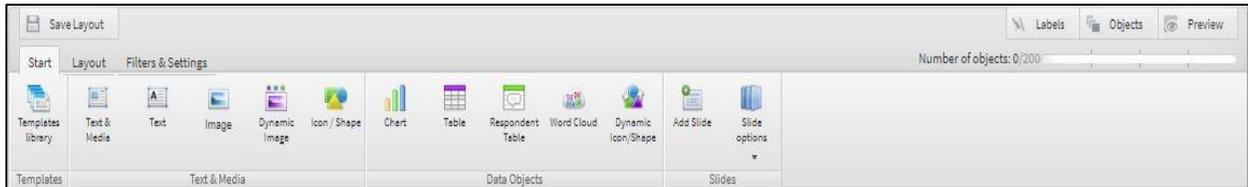


- In the left-side panel you can see your save and export options available



Object Types

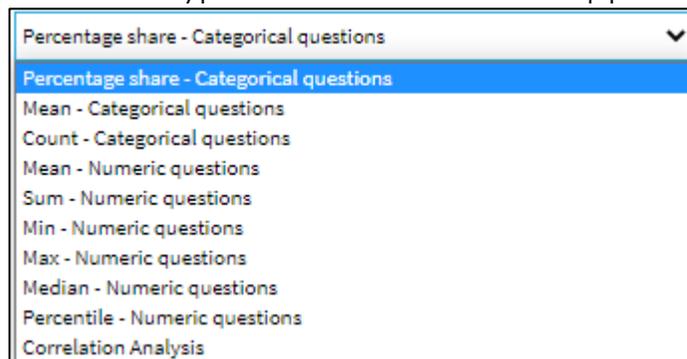
- Under the Start tab the admin toolbar displays with a variety of objects that can be added to the canvas



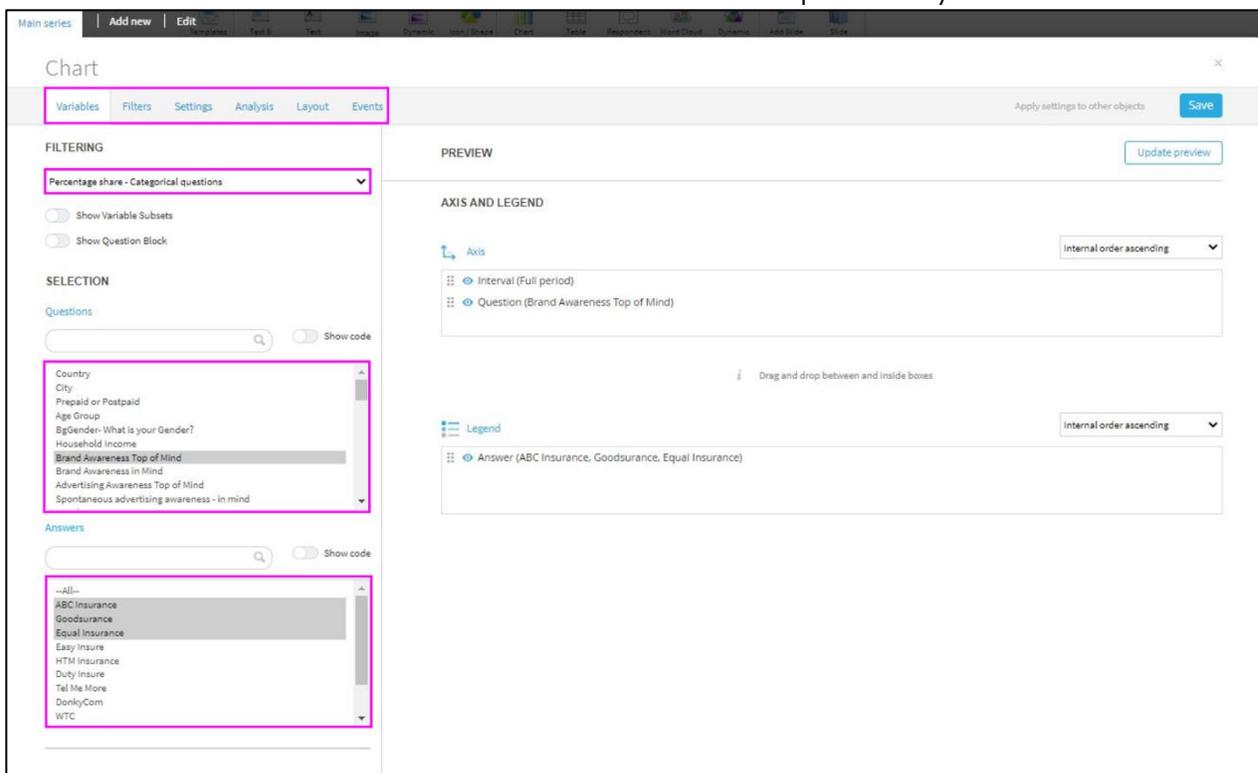
- **Text & Media:**
 - Use HTML and JavaScript to embed videos or other web content. Users can also insert any URL to the dashboard
 - Click [here](#) to learn more about text & media options
- **Text:**
 - Insert text box for any commentary, headers, footers, etc. Text can be formatted in a variety of ways regarding size, font types, colors, and an option to make it dynamic to the report
- **Image:**
 - Apply an external image to the canvas (jpeg, png, svg)
- **Dynamic Image:**
 - Insert and map an external image to an existing variable or hierarchical filter to dynamically update
 - Click [here](#) to learn more about dynamic images
- **Icon / Shape:**
 - Apply a variety of native icons, shapes, symbols, flags, etc. to the report for enhanced visualization

Chart Creation

- Chart:
 - Add a chart to your canvas to report on data and collect meaningful insight
 - To insert a chart: click on the chart ribbon from the admin toolbar and double click into the new object
 - Variables:
 - Select the type of calculation to be applied

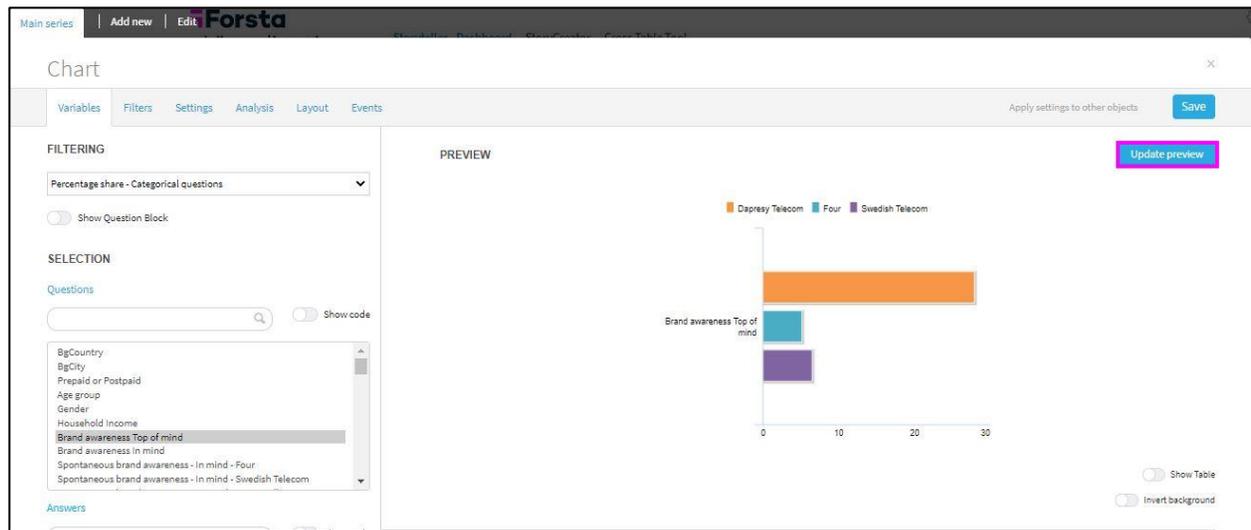


- Select question(s) from survey and the answer alternatives to show as data points in your chart



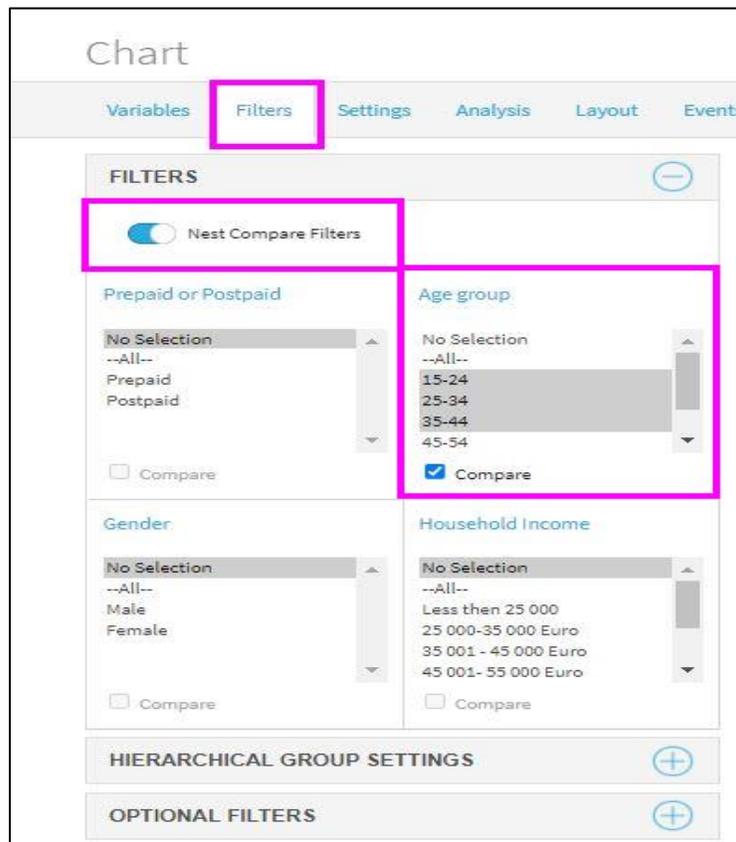
- Position questions and answers by dragging and dropping into axis or legend field

- Click update preview to see the visual without having to save to the canvas

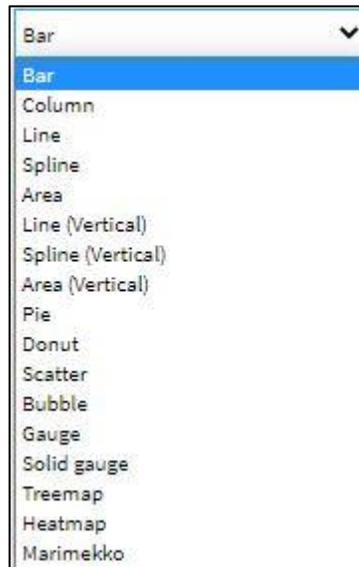


- Chart Filters

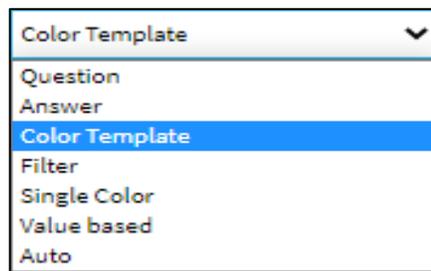
- Apply object level filters or compare series to the chart
- Choose from filters that have been applied in the questions page (refer to variable administration section)
- Choose to nest or unnest compare filters (splits)



- Chart Settings:
 - Apply a variety of settings and data configuration options to the chart
 - Chart type: Select the type of chart to be applied in the dropdown



- Series Color Source: Pick from a color palette using RGB, hex codes or directly from a color template



- Show values in chart and determine number of decimals to be shown
- Series settings: used to display or hide a series based on several factors including calculated results and base sizes.

- Time selections: display data on a custom time period and interval. Users can also apply and modify the moving average. Visualizations will automatically update as new data is pulled into the system
 - Full Period: report on all the data that has been loaded into the project
 - Select last X periods: choose a time period that updates dynamically as new data is loaded in i.e., the last X number of days, weeks, months, etc.
 - Year-to-date: report on all data from the current year
 - Select start and stop date: report on a fixed time period

Chart

Variables
Filters
Settings
Analysis
Layout
Events

CHART -

Chart type Bar ▼

Series options Side by side ▼

Invert chart
 Show as polar

Allow zooming

Series color source Auto ▼

Legend position Top ▼

Show values
 No. of decimals
1

Chart rendering By shown decimals ▼

Base size information Base hidden ▼

SERIES +

TIME SELECTIONS +

AXIS AND TEXT +

TOOLTIP +

CALCULATION +

OTHER +

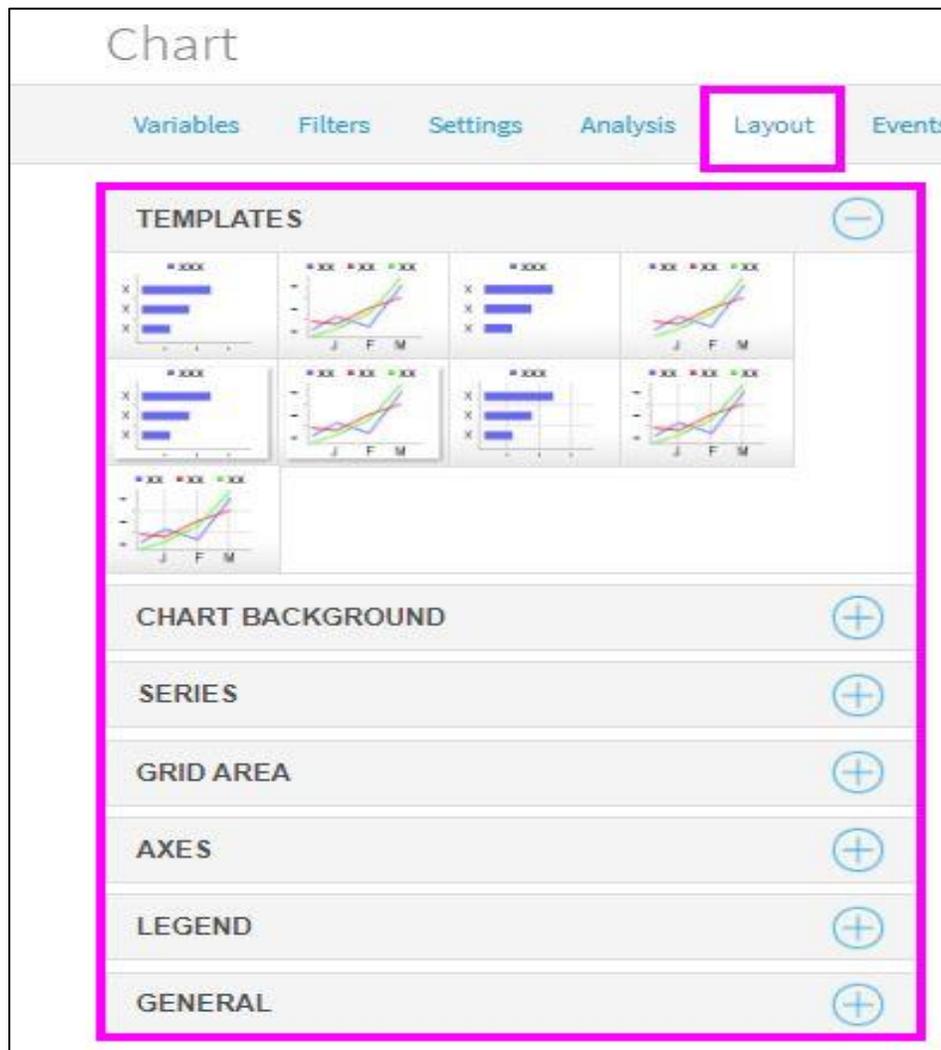
- Chart Analysis
 - Apply analyses to any chart or table using the analysis tab
 - Benchmarks are used to show the value difference between time periods or other data points. Benchmarks can be calculated in units, percentage share, or conversion rate
 - Statistical Analysis:
 - Significance tests can be applied to charts and tables using an independent sample Z test or T test.
 - Toggle on the radio button and use the dropdown options to configure your analysis and what to test against

The screenshot displays the 'Chart' analysis interface. The 'Analysis' tab is selected, and the 'STATISTICAL ANALYSIS' section is expanded. A pink box highlights the 'Enable significance tests' toggle, which is turned on, and the dropdown menu for 'Type', which is set to 'Two independent sample Z test'. Other settings include 'Base limit', 'Respondent count limit', 'Base size', 'Test between', 'Test within', 'Comparison type', 'Comparison behavior', 'Significance level', 'Symbols', and 'Starting letter'. The 'PREVIEW' section shows a bar chart with data for 'Brand awareness Top of mind' across different age groups and telecom providers. The 'AXIS AND LEGEND' section shows the chart's configuration.

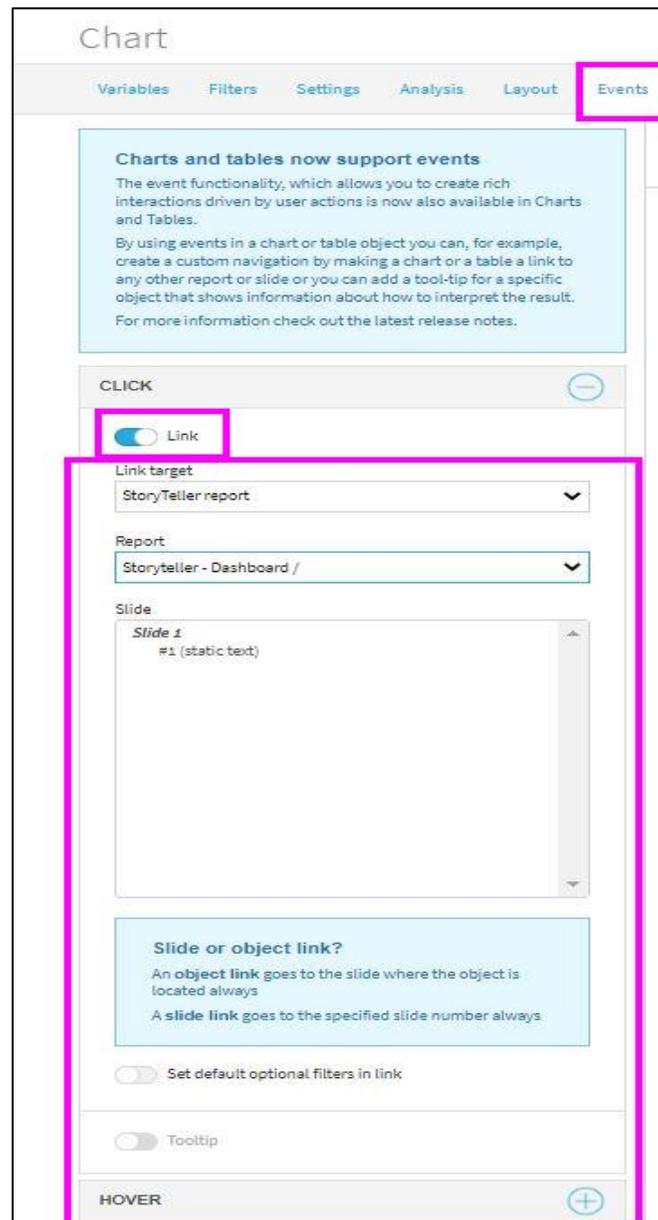
Category	Value
Dapresy Telecom - 25-34	31%
Dapresy Telecom - 35-44	32%
Four - 25-34	4% (-)
Four - 35-44	7% (-)
Swedish Telecom - 25-34	1% (-)
Swedish Telecom - 35-44	3% (-)

- Percentile:
 - Uses aggregated results shown in a chart and visualizes them as percentiles. Users customize their percentile scales and assign a label and color to each
- Mean Value Series:
 - Add a series that displays the mean value of the result in the chart
- Aggregated Series:
 - Used to sum the values displayed in the chart instead of calculating a mean. Users have the same customization options as the mean value series

- Chart Layout
 - Choose from a variety of prebuilt chart templates or sort through the layout sub-menus to customize the exact style of your visualization
 - Customize the look and feel of each component of the chart: Axis & legend, data points, fonts, sizing, gridlines, backgrounds, etc.



- Chart Events
 - Create drill downs or custom navigation by linking a chart to any other slide or report. Users can include a hover tooltip to provide more information on a specific chart or result.
 - Choose to incorporate clickable link and or a hover tooltip
 - Choose report and slide to link chart to



- After creating chart, simply click save to apply to the canvas and reposition as needed
- Click [here](#) to learn more about additional chart settings

Table set up

- Table:
 - Add a table to your canvas to report on data and collect meaningful insight (same logic applies for setting up a table as chart)
 - Click [here](#) to learn more about table set up

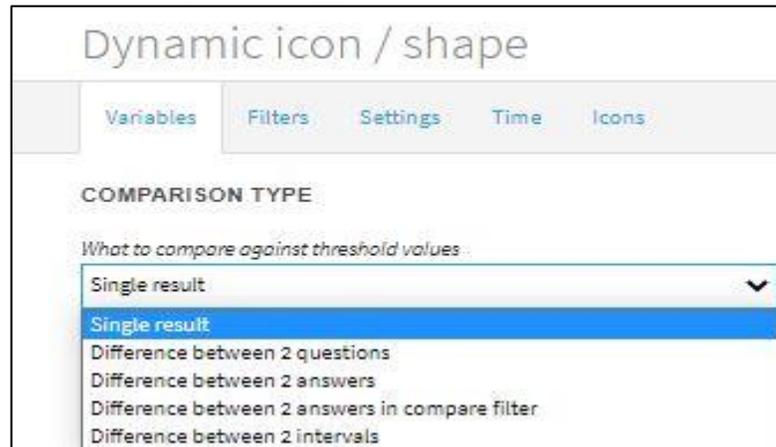
Respondent Table set up

- Respondent table:
 - Add a respondent table to report on and filter open ended comments by clicking on the respondent table ribbon in the admin toolbar
 - Select variables to include in the respondent table by highlighting and clicking “add”
 - Configure any filters to be applied
 - Settings is where you can set table up using a specified time period and can control options such as table width, limiting table to show a specified number of rows and hiding/displaying information
 - In layout settings you can control the look and feel of the object by incorporating different fonts, sizing, colors, etc.
 - Click [here](#) to learn more about respondent table set up:

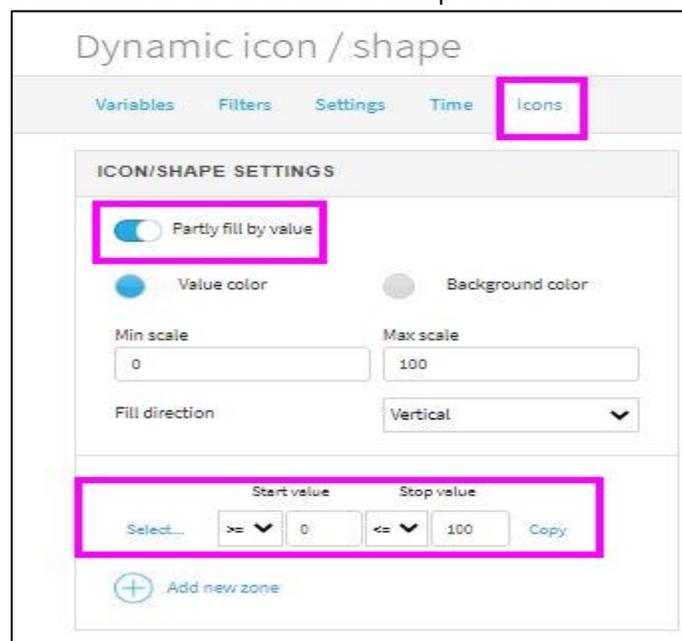
Respondent ID	Response Date	What do you think about Dapresy Telecom?	Overall Satisfaction
1	2019-01-03	Good value for money	8
2	2019-01-03	Very Helpful	
3	2019-01-03	Gives that extra service	5
4	2019-01-03	Friendly	9
5	2019-01-03	Gives that extra service	8
6	2019-01-03	Gives that extra service	1 Doesn't agree at all
7	2019-01-03	Professional	5
8	2019-01-03	Would definitely recommend	
9	2019-01-03	Professional	
10	2019-01-04	Good value for money	
11	2019-01-04	Extremely competent	
12	2019-01-04	Good value for money	7
13	2019-01-04	Good value for money	5
14	2019-01-04	Very Helpful	5
15	2019-01-04	Gives that extra service	
16	2019-01-04	Good value for money	
17	2019-01-04	Good value for money	
18	2019-01-04	No comment	7
19	2019-01-04	Extremely competent	7
20	2019-01-04	No comment	1 Doesn't agree at all

Dynamic Icon/shape

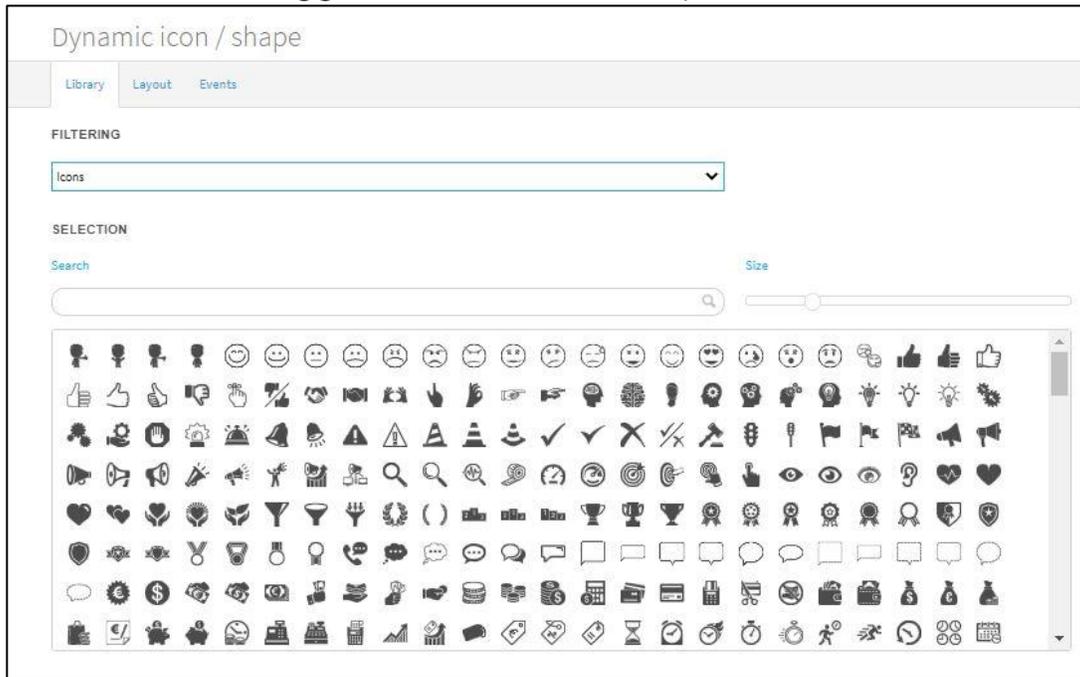
- Dynamic icon/shape
 - Connect icons and shapes to variables to dynamically update by selecting the dynamic icon ribbon from the admin toolbar
 - Choose from a variety of ways to display dynamic icons
 - Partly fill by value: Partially fill icon based on a count or percent value
 - Select comparison type



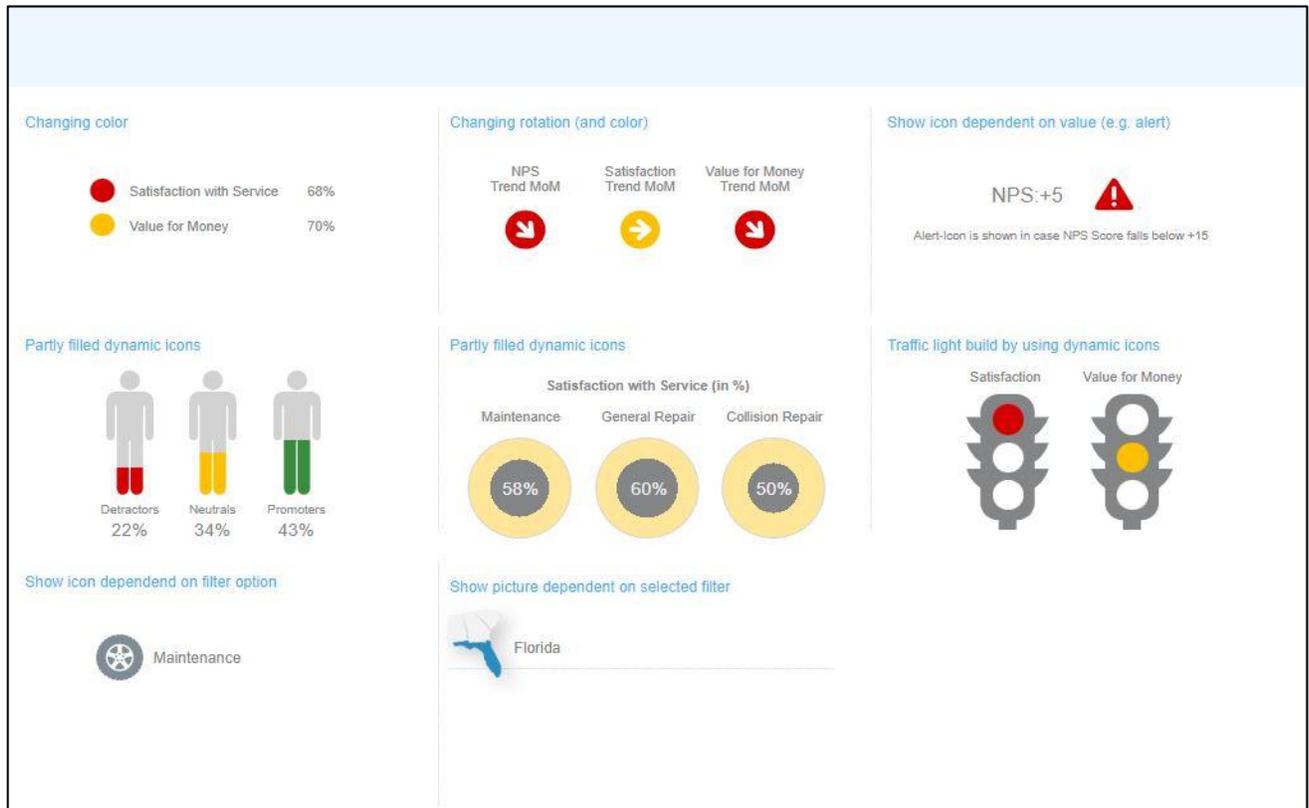
- Select questions and answers to show as data points
- Apply any filters, weights, or time periods
- Under icon tab, toggle on partly fill by value, choose color scheme and scale
- Click select to choose a shape or icon from our library



- Choose an icon from any category in the dropdown. All icons are tagged with searchable keywords

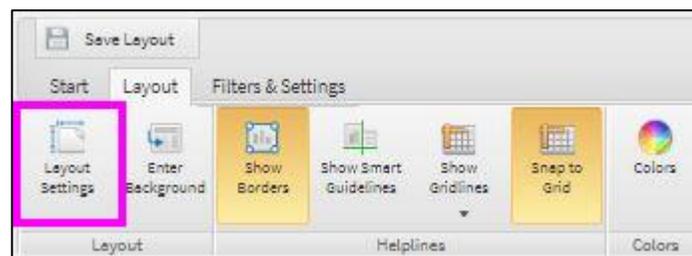


- See common use cases for dynamic icons below or click [here](#) to learn more about dynamic icons/shapes

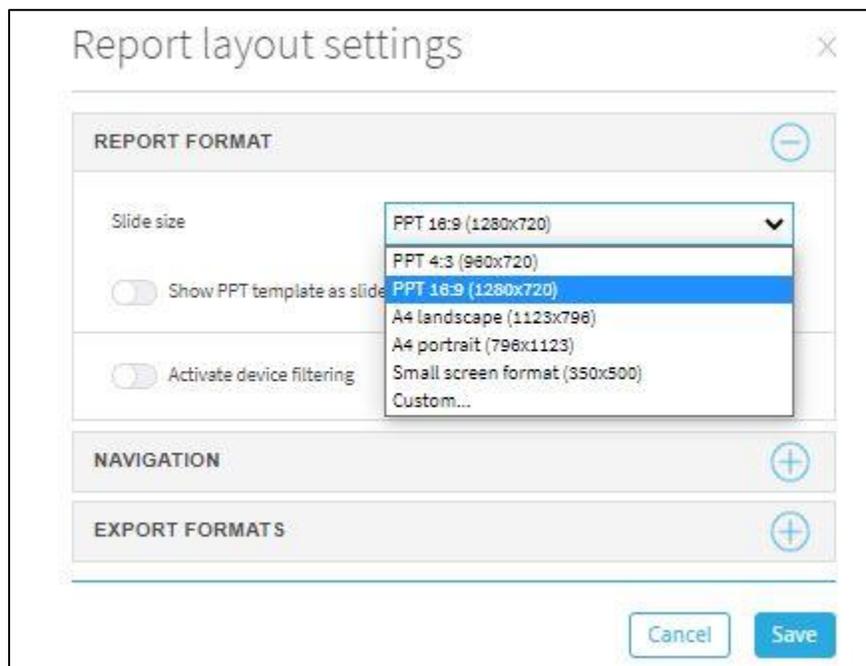


Slide layout and formatting

- Add slide / slide options:
 - Add new slides or copy, import, rearrange, and delete existing slide
- Layout settings
 - Next to the start tab, access your report layout and export settings by selecting layout

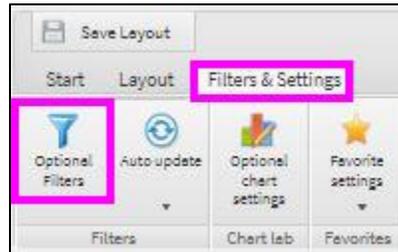


- Configure the size of your canvas, navigation through the report and export formats you want to enable

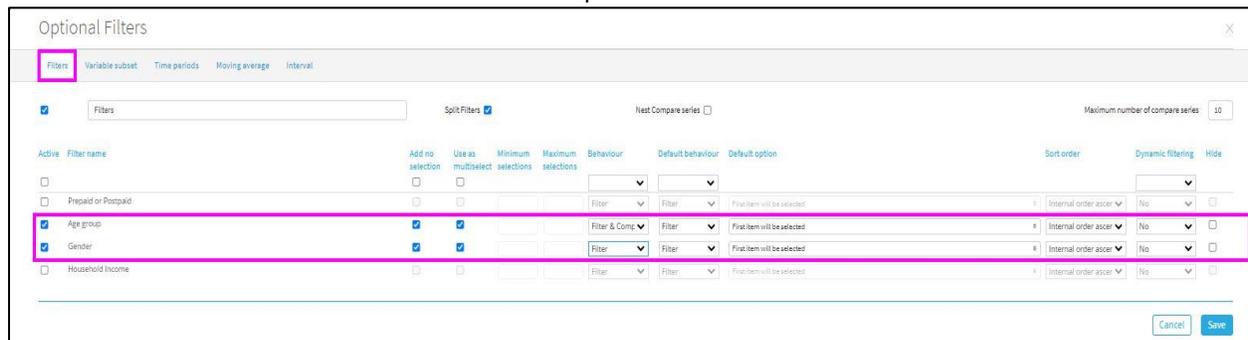


Applying Filters

- Filters & Settings:
 - Activate deck level filters and time periods to apply to entire report and save as favorites



- Apply variables as filters and or compare options to be selected in dashboard
 - Filter: View respondents within a specific group
 - Compare: View a split between respondent types
- Choose other settings such as including a no selection or multi-select option to filters

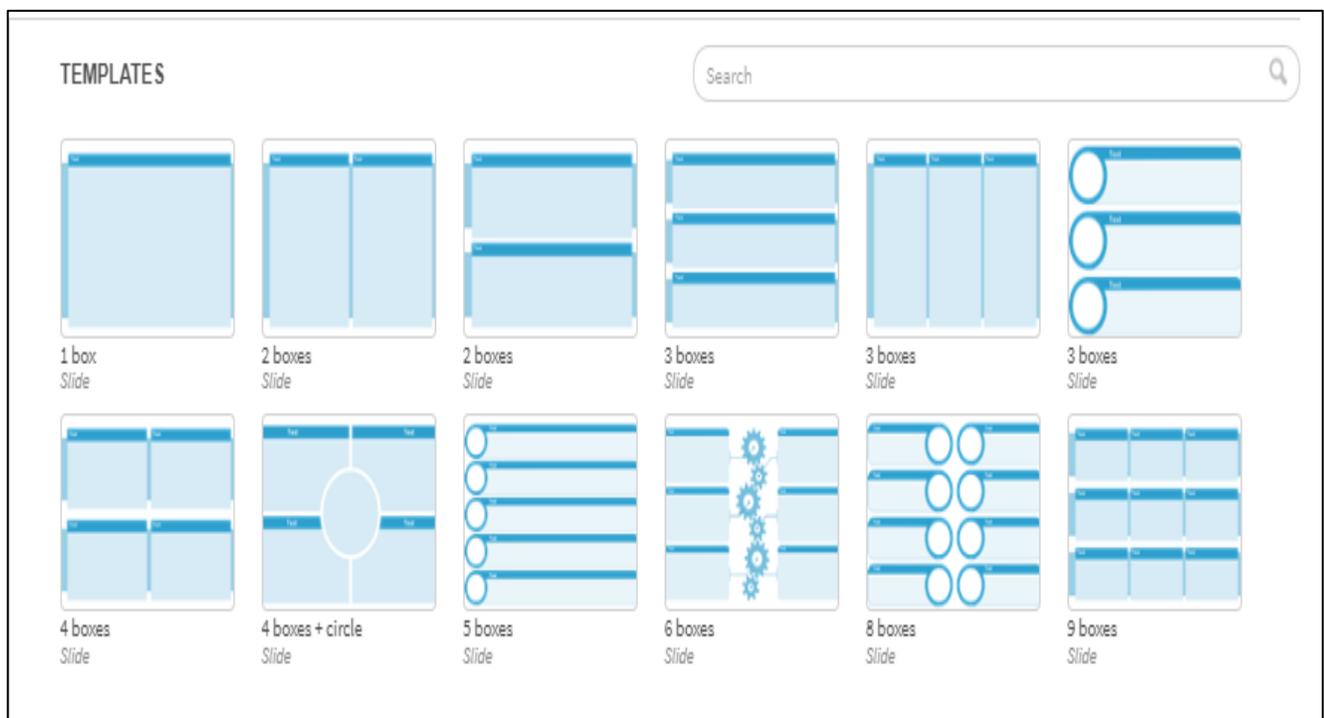


- Save to report and make appropriate data cuts



Creating Templates

- Templates Library is a customer folder to access previously saved objects, slides, or reports to be reused for more efficient reporting
 - Right click on report to save object, slide, or report as template
 - Share and access templates through customer folder to be reused in reports
 - Click [here](#) to learn more about templates

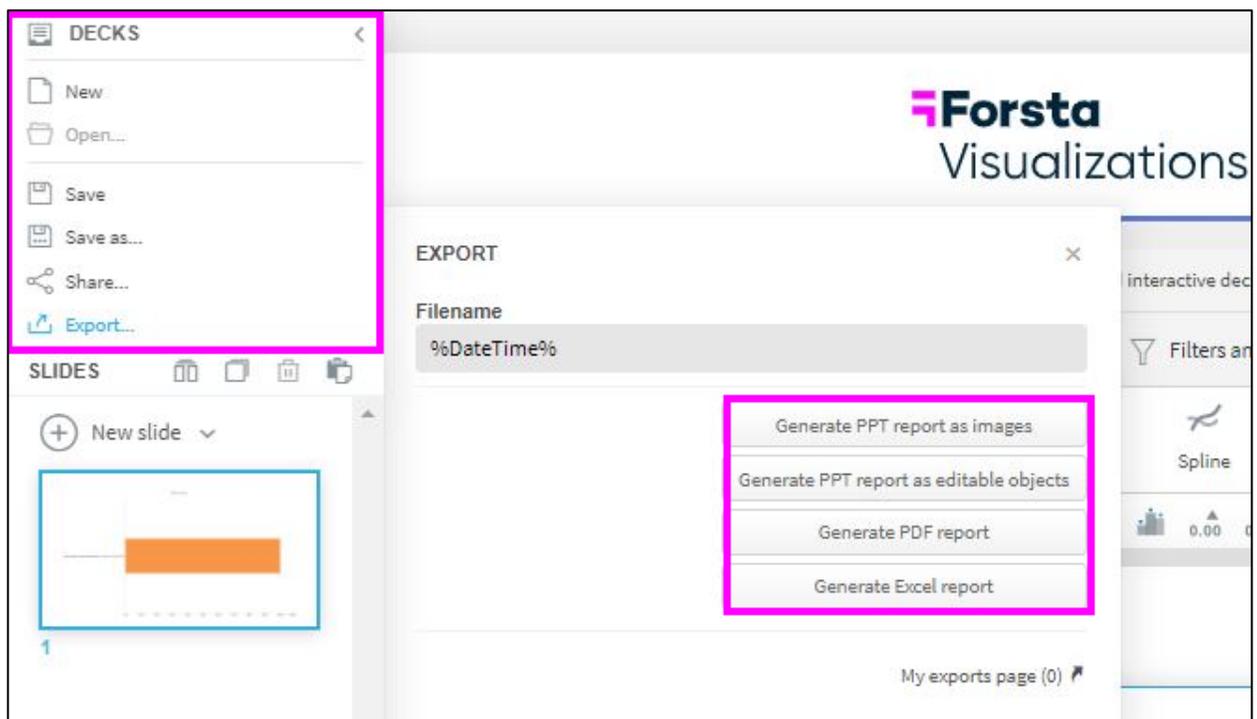


Front End StoryCreator (PPT Automation)

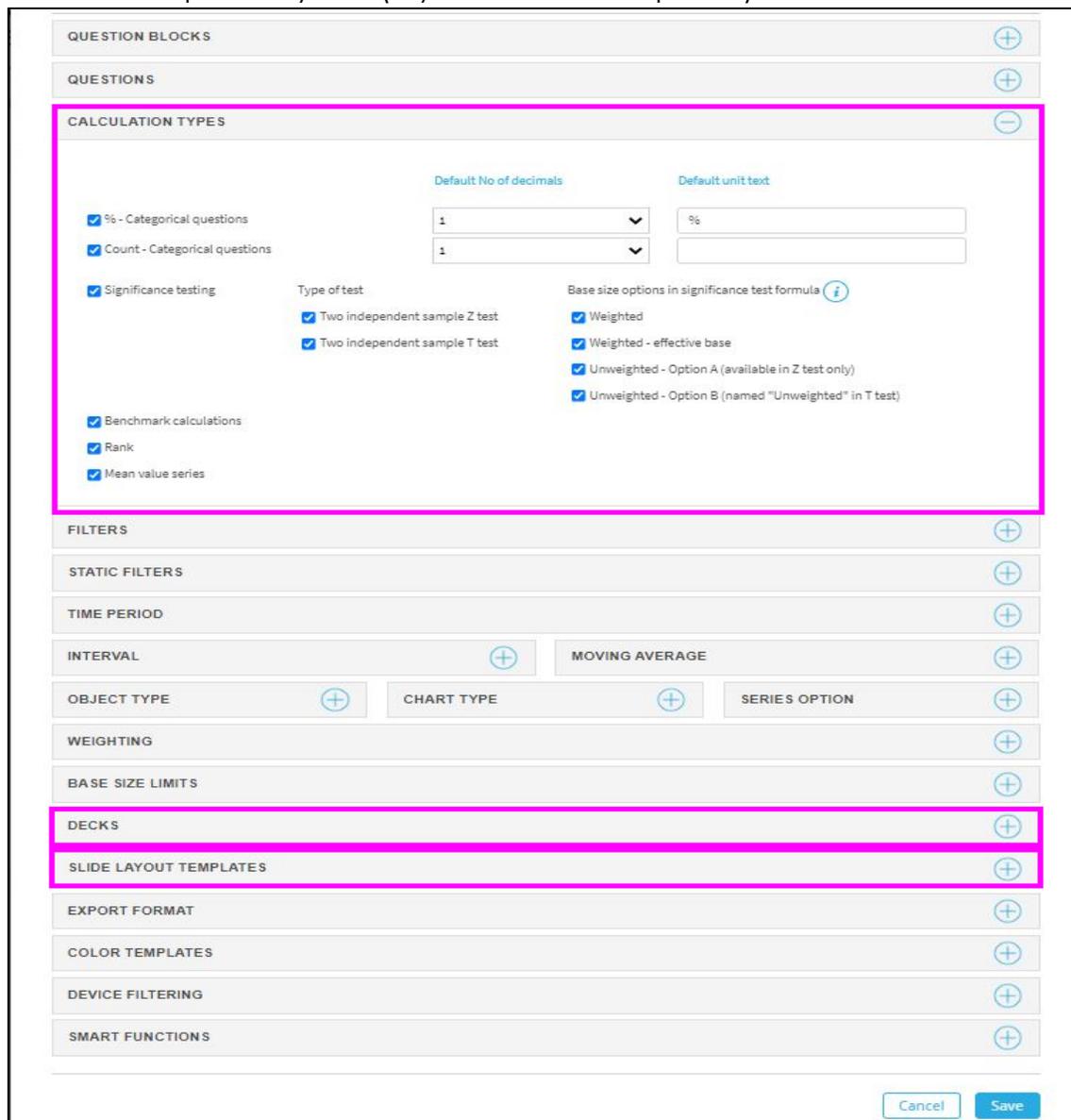
- From the back-end, to access the “front-end” of Forsta Visualizations, where you build your reports, click the “Design/Preview Reports” button



- In the left-side panel you can see your deck settings related to creating a new deck or opening a previously created or shared deck
- Here you can also choose to share your deck with other users and determine whether these decks should be editable by other users through the collaboration feature
- You can also export all of your decks using the Export option in the left-side panel



- In the top right corner, there is a “Setup” button which allows you to access your deck-level global settings. (*Note this is only available with administrative access*) Some of the most commonly uses settings include:
 - **Calculation Types** - you can choose which calculations are available and set global, default settings regarding units and decimals on the calculation level
 - **Decks** - you can toggle on “Allow users to add deck level filters”. Once turned on and back in the deck builder interface, at the top of the screen you can enable any of your filters as global, deck-level filters to filter your entire report
 - **Slide Layout Templates** - you can choose whether you want to use the system layout templates or if you want to upload your own PPT template layouts (layout master templates).

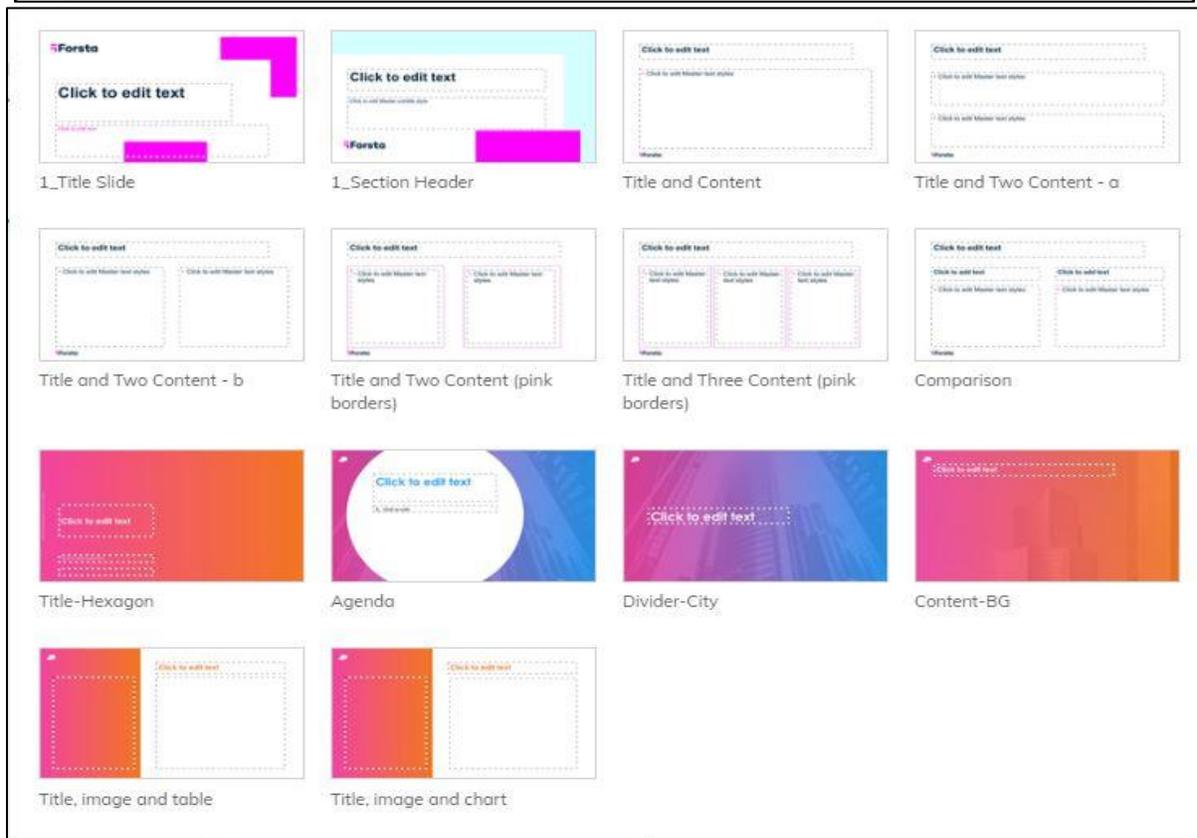
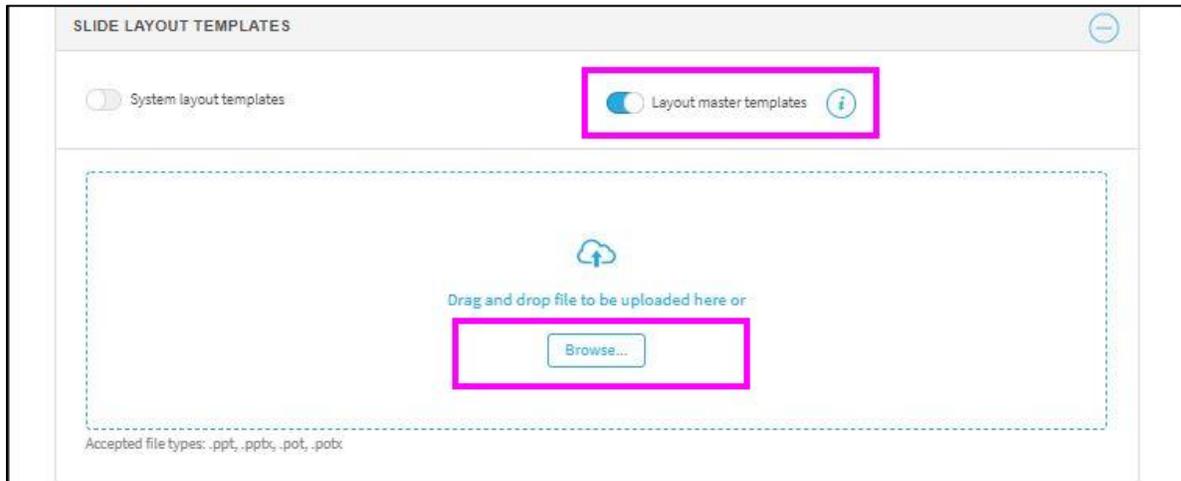


The screenshot displays the 'Setup' interface with the following sections and options:

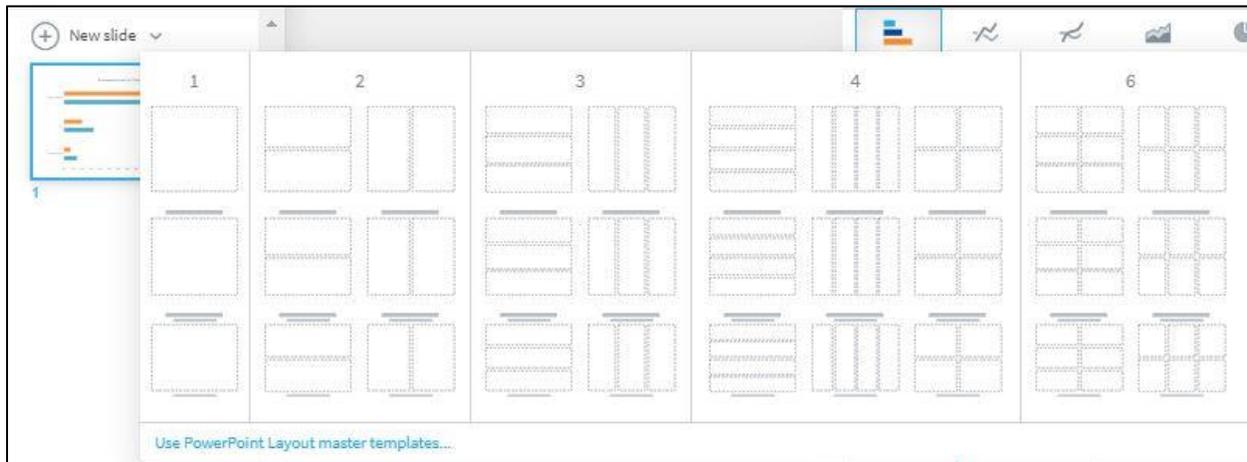
- QUESTION BLOCKS** (+)
- QUESTIONS** (+)
- CALCULATION TYPES** (-)
 - Default No of decimals: 1
 - Default unit text: %
 - % - Categorical questions
 - Count - Categorical questions
 - Significance testing
 - Type of test:
 - Two independent sample Z test
 - Two independent sample T test
 - Base size options in significance test formula (i):
 - Weighted
 - Weighted - effective base
 - Unweighted - Option A (available in Z test only)
 - Unweighted - Option B (named "Unweighted" in T test)
 - Benchmark calculations
 - Rank
 - Mean value series
- FILTERS** (+)
- STATIC FILTERS** (+)
- TIME PERIOD** (+)
- INTERVAL** (+) | **MOVING AVERAGE** (+)
- OBJECT TYPE** (+) | **CHART TYPE** (+) | **SERIES OPTION** (+)
- WEIGHTING** (+)
- BASE SIZE LIMITS** (+)
- DECKS** (+)
- SLIDE LAYOUT TEMPLATES** (+)
- EXPORT FORMAT** (+)
- COLOR TEMPLATES** (+)
- DEVICE FILTERING** (+)
- SMART FUNCTIONS** (+)

Buttons: Cancel, Save

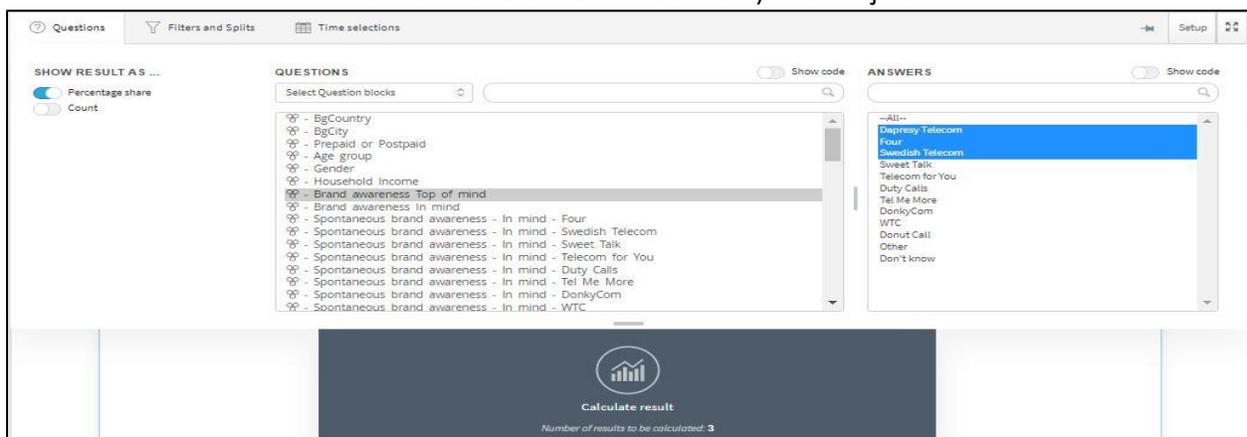
- Layout Master Templates: Enables you to upload your own PPT template and select which layout from your master slide template should be used as default. Your deck in StoryCreator will take on all settings (backgrounds, slide sizes, etc.) from the PPT template.
 - Click [here](#) to learn more about PPT templates:



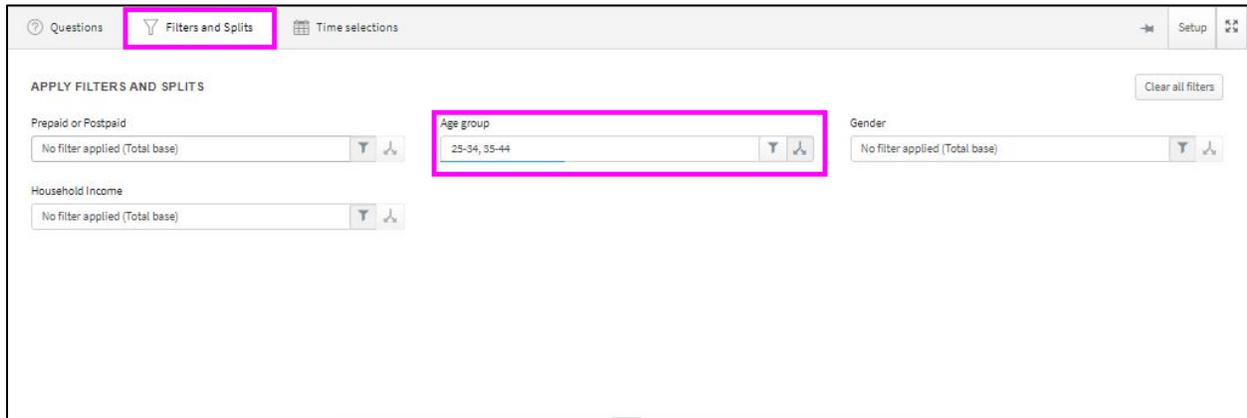
- System Layout Templates: Gives you access to the default system slide layouts and enables you to choose whether you want the PPT slide background to display and also set the slide size. When using this option, upload the PPT template (that you export into and can use as a background) under the “Export Format” section.



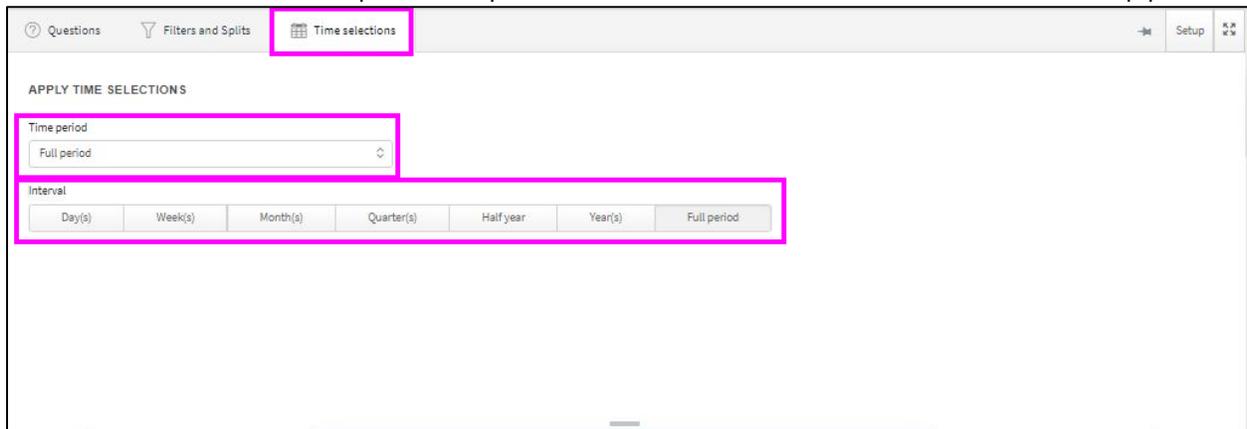
- Back in the deck-builder interface, you can add new slides in the left-side panel by either clicking “+ New Slide” or expand the arrow next to “+ New Slide” to add in a new slide using a different slide layout
- The objects that can be added to your StoryCreator deck are charts, tables, images, shapes, and text boxes. Click the icon you want to add into the deck to begin working on that object.
- Object Settings:
 - “Questions” tab
 - Shows the different calculation types available for categorical and numerical variable types
 - All questions are shown in a scrollable and searchable list
 - Once a question is selected, you will see the associated answer list display on the right where you can pick and choose which answers should be included in your object



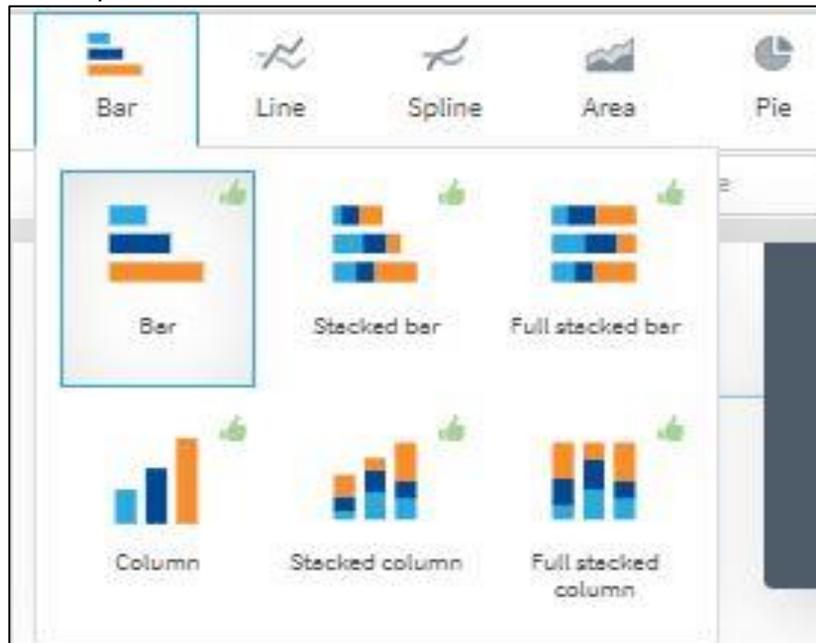
- “Filters and splits” tab
 - Shows all filters that have been enabled in the back-end of the system
 - Select the check box next to the filter options you want to drill down into
 - The filter icon enables you to filter, the split icon allows you to compare



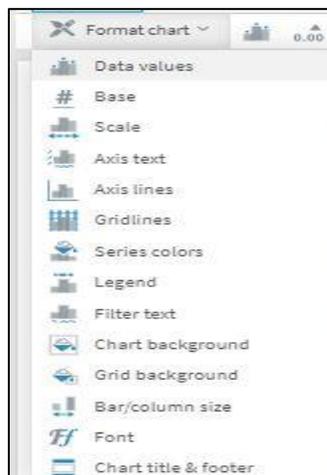
- “Time Selections” tab
 - The “Time Period” dropdown allows you to set the time period you are reporting on:
 - Full Period: report on all the data that has been loaded into the project
 - Select last X periods: choose a time period that updates dynamically as new data is loaded in i.e., the last X number of days, weeks, months, etc.
 - Year-to-date: report on all data from the current year
 - Select start and stop date: report on a fixed time period
 - The “Intervals” option allows you to split the data by different time period options. “Full Period” means no interval is applied



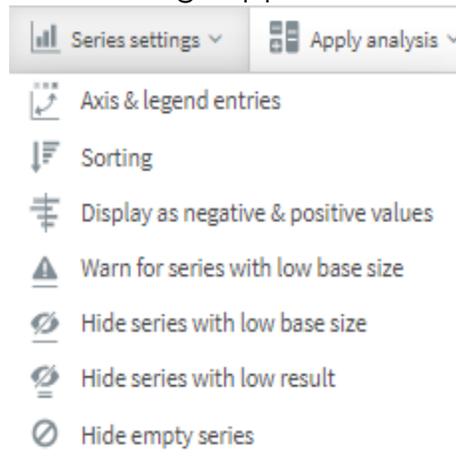
- Visualization Types
 - When working in a chart, you will see all supported chart types and can click into each chart type and see additional options
 - When working in a table, you will see different default table styles



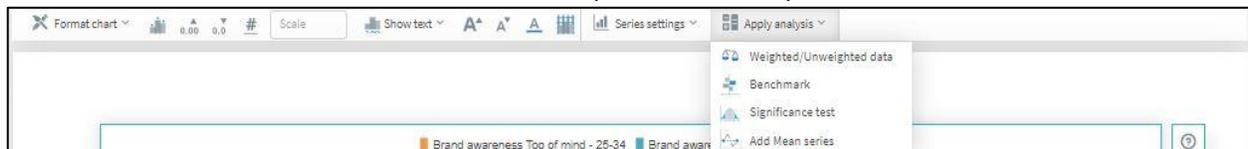
- Settings Toolbar
 - At the top of the slide, you will see your main settings toolbar which includes all options for customizing your objects. Hover over each icon in the toolbar to see what the setting enables you to do
 - Format Chart: options related to the look-and-feel or design of your charts and tables including colors, fonts, etc.



- Series Settings: data-driven options such as sorting, low base warning/suppression rules, etc.

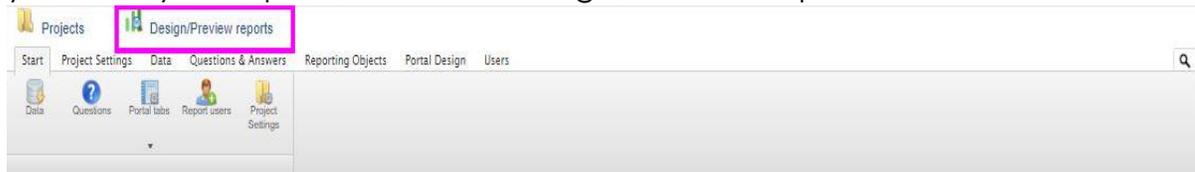


- Apply Analysis allows you to run additional analyses within your charts and tables including benchmarking, statistical analysis, mean value series, and ranks (*only available in tables*). Click into the analysis you want to run, turn on the radio button to enable the test, and fill out the fields provided to you

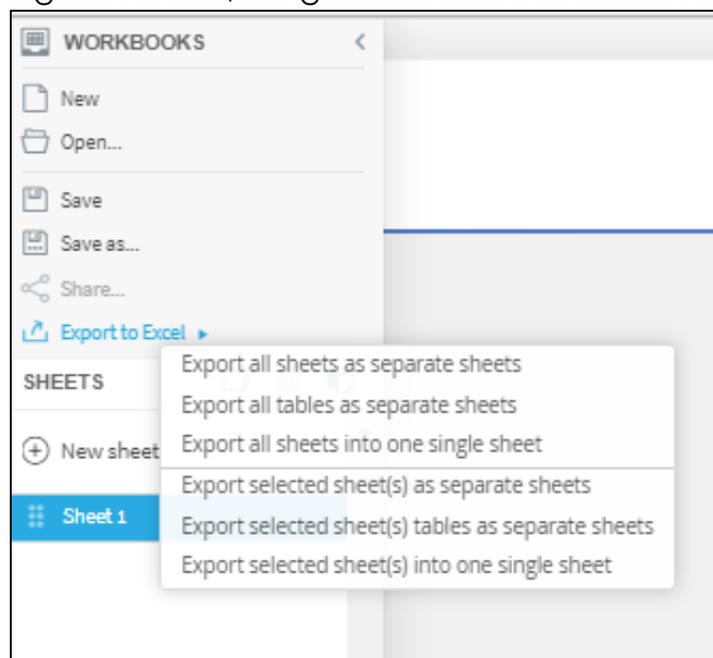


Front End Cross table tool

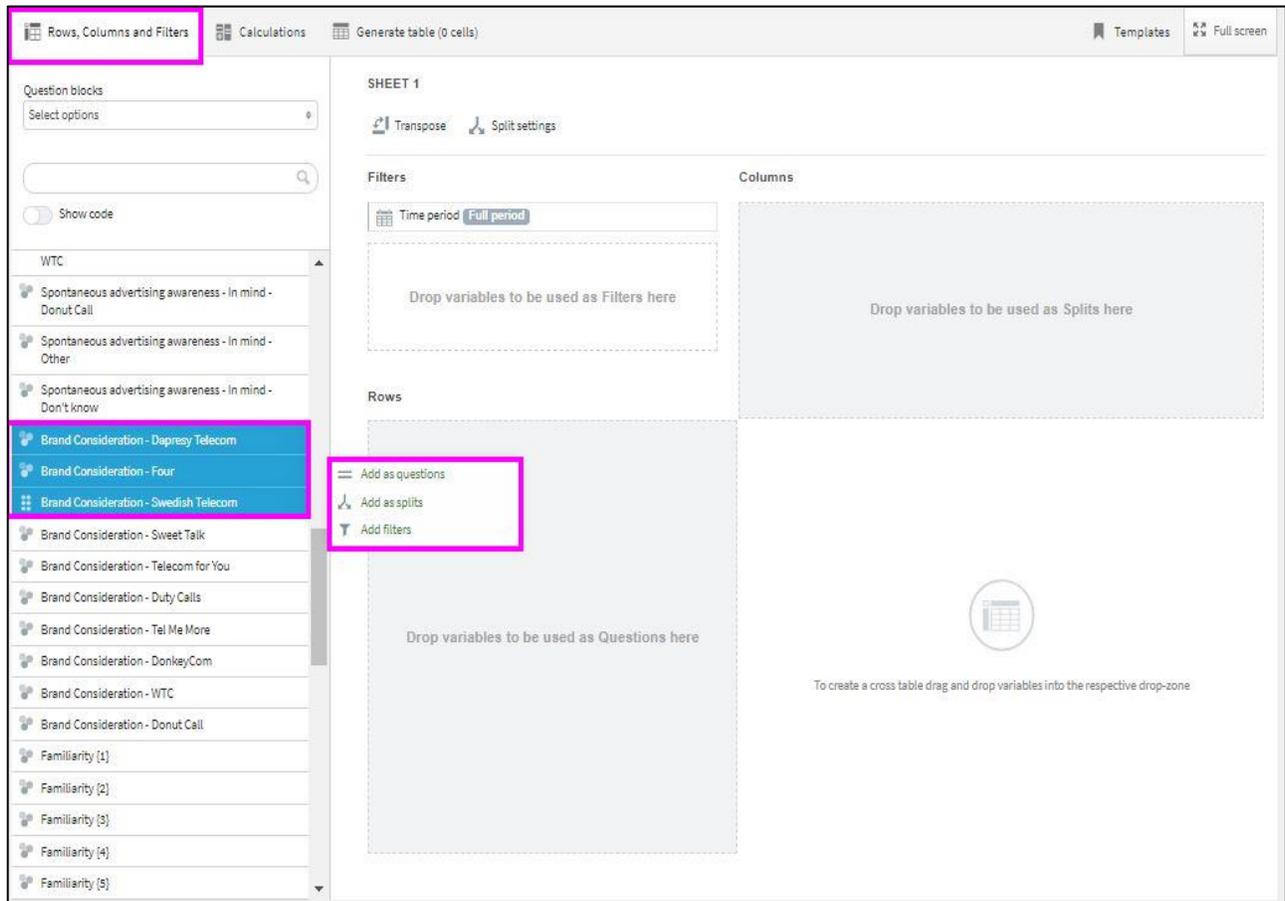
- From the back-end, to access the “front-end” of Forsta Visualizations, where you build your reports, click the “Design/Preview Reports” button



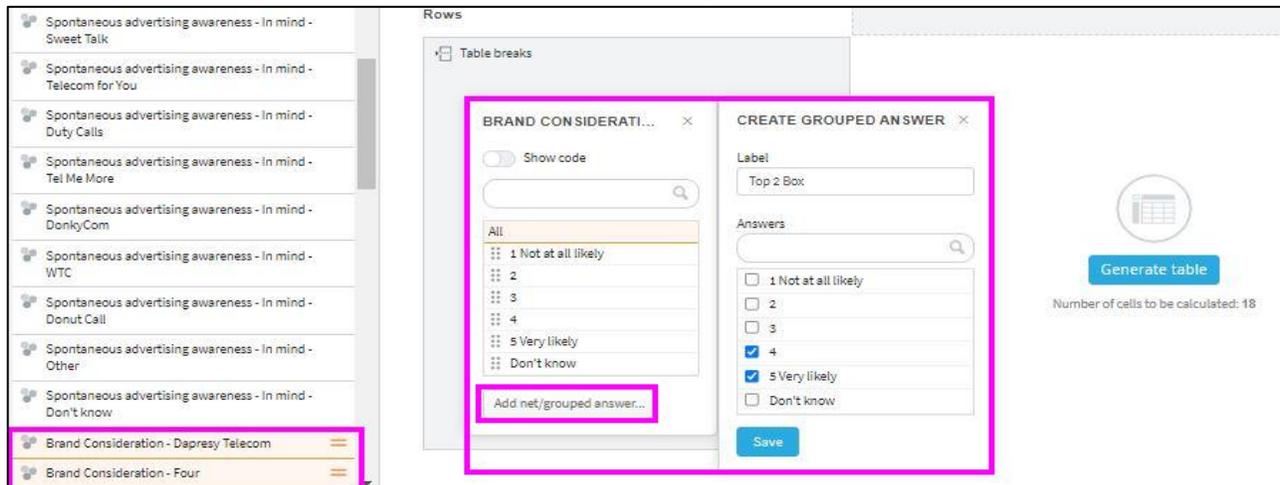
- In the left-side panel you can see your workbook settings related to creating a new workbook or opening a previously created or shared workbook
- Here you can also choose to save or share your workbook with other users
- You can also export all your workbooks to Excel using the Export option
- In the left-side panel you can also choose to add in new sheets, drag-and-drop to change the order, or right-click to rename a sheet



- “Rows, Columns, and Filters” Tab
 - On the right side you have your build area which is where your tables are created using a drag-and-drop interface
 - From your list of questions, you can drag-and-drop variables into either the “Rows” section, the “Columns” section or the “Filters” section. You can also choose to hover over a question and choose to add as a Row, Column or Filter from the hover-over window

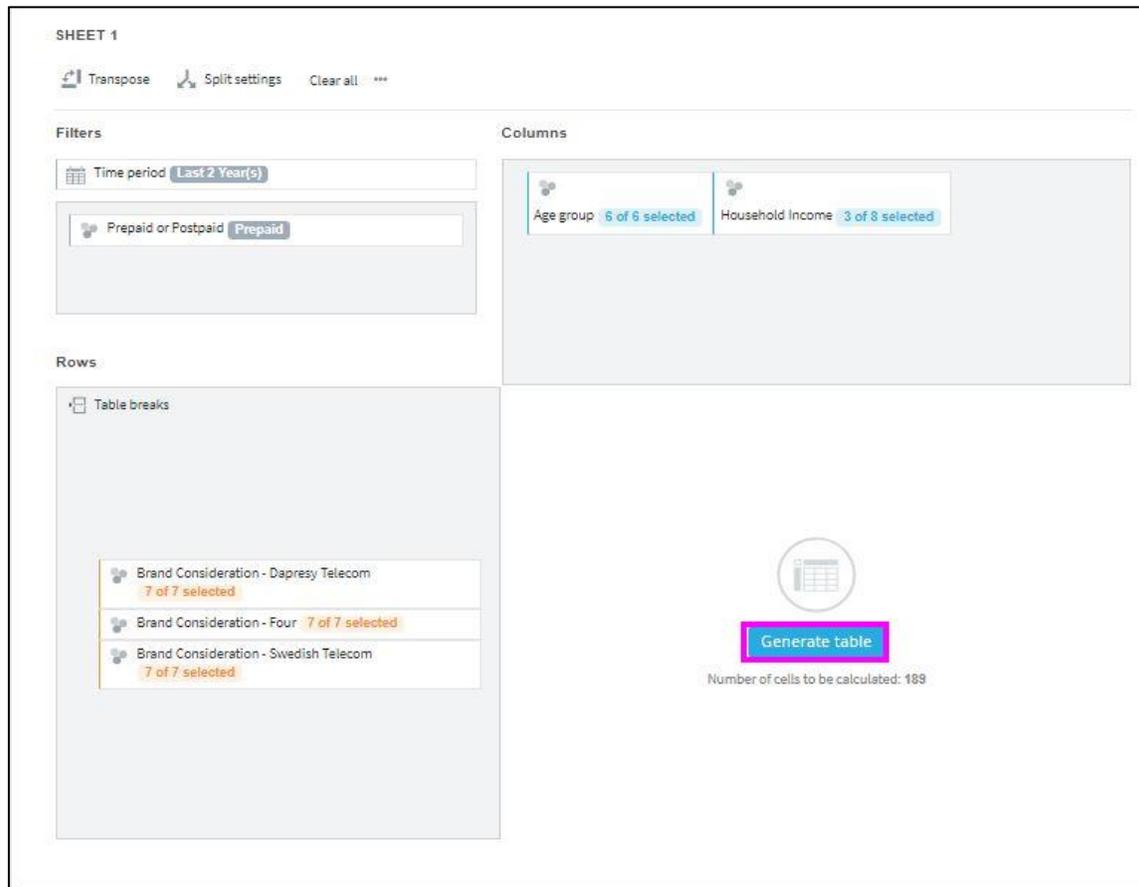


- Next to your question in either the Rows or Columns, select the orange text that says “X of X selected”. This will bring you to the answers associated with that question and you can select/deselect which answer options you want included in the table. Here you can also choose to create nets/grouped answers directly in the Cross Table. Simply give your net a name and choose which answers to net. This can now be included in your Cross Table.



- In the filter selection, click the variable(s) you have selected as a filter and select which filter options you want to filter by
- In the “Time Period” section, you can define the time period you are reporting on:
 - Full Period: report on all the data that has been loaded into the project
 - Select last X periods: choose a time period that updates dynamically as new data is loaded in i.e., the last X number of days, weeks, months, etc.
 - Year-to-date: report on all data from the current year
 - Select start and stop date: report on a fixed time period

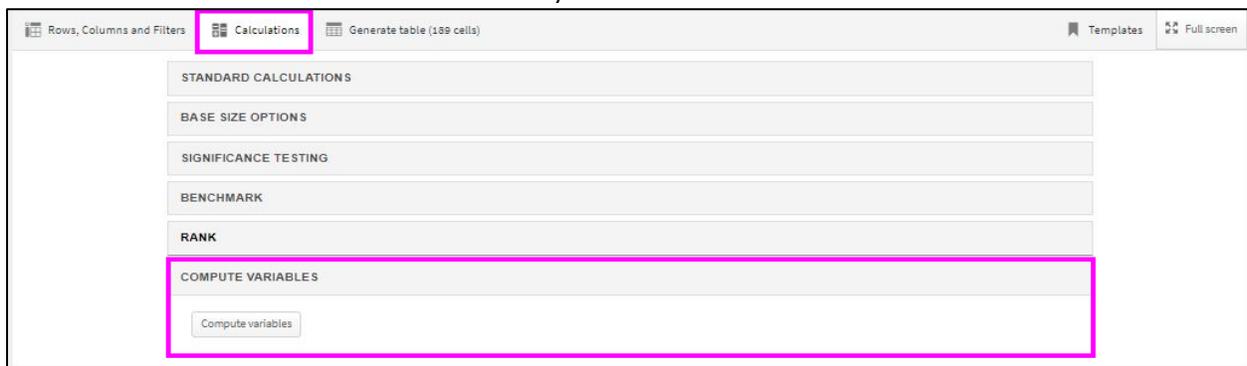
- Once your table is set up, click the blue “Generate Table: button to run the cross tabs



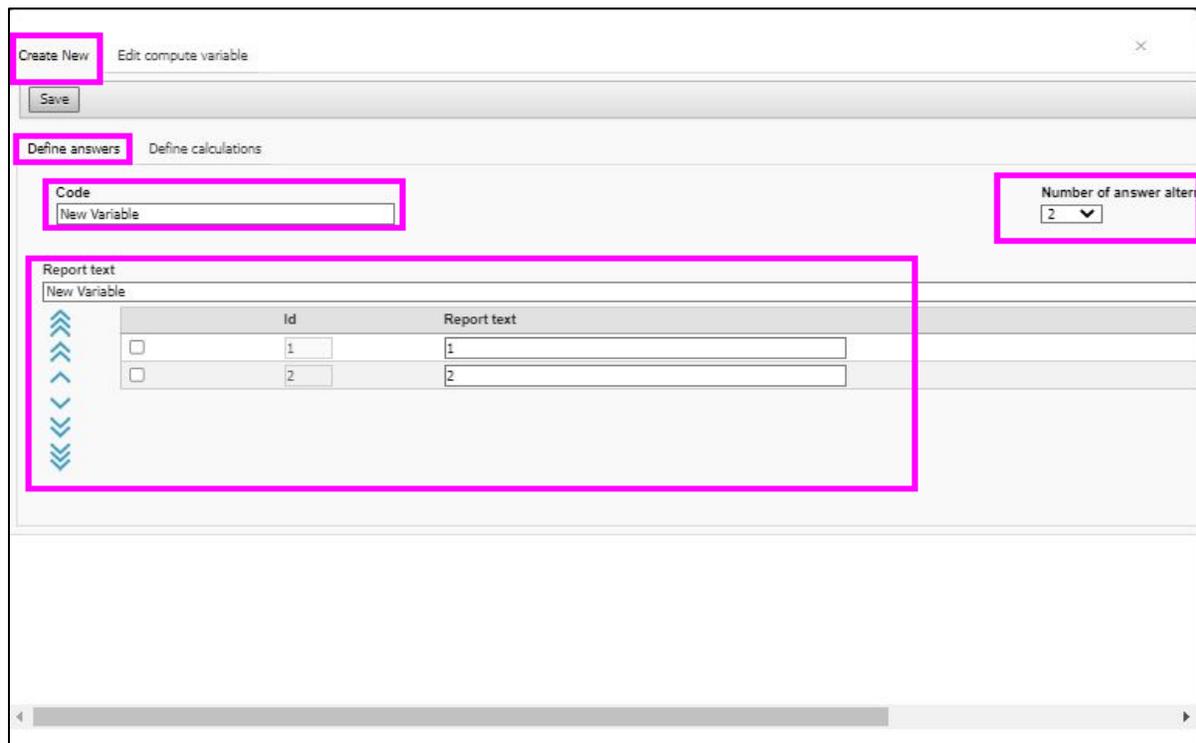
- Once generated, you can then access the settings toolbar within the “Generate table” tab.
 - Calculations - include additional calculation types i.e. counts, means, etc.
 - Splits - choose whether your banners should be nested or un-nested and add in totals
 - Use weight - weighted or unweighted data
 - Decimals - how many decimal places should display
 - Base - weighted or unweighted base and where it should display within the Cross Table
 - Page Breaks - adds in a page break after each selected question which changes the Cross Table from one stacked table to individual tables per question
 - Table Key – choose information to display at the top of your table. This information also exports to Excel



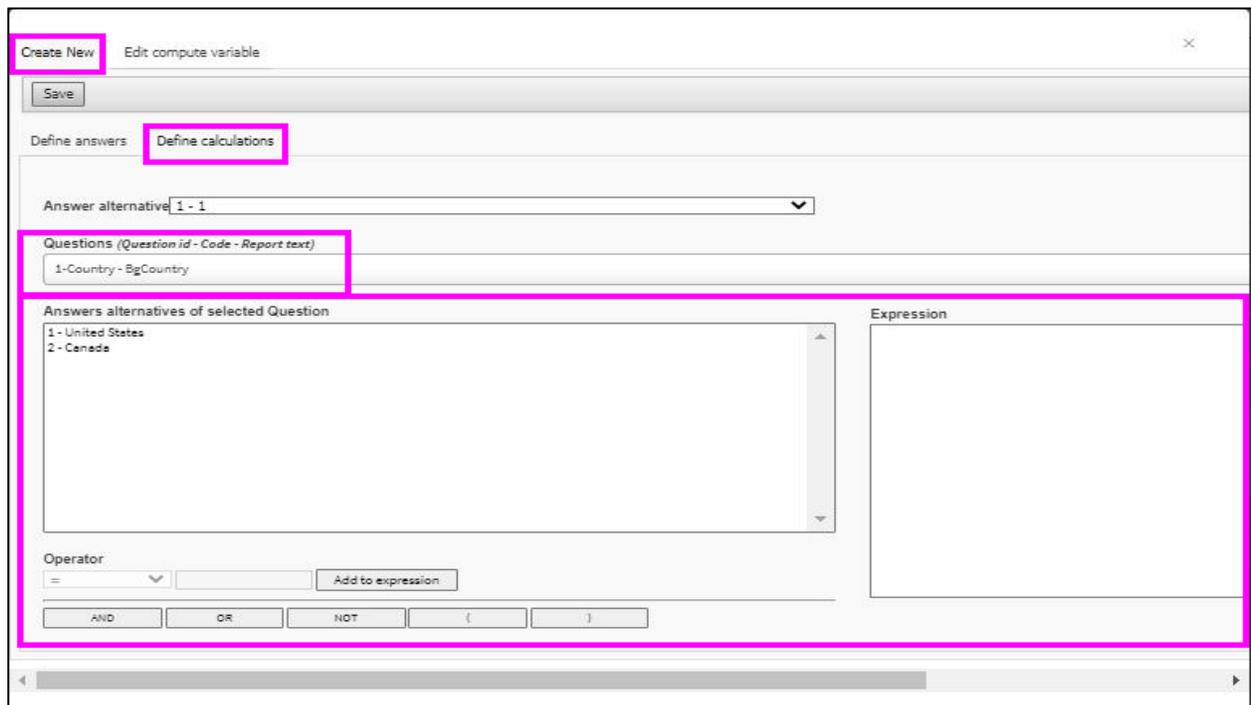
- Multiple settings from the toolbar provide you with a “More...” option which links you to the “Calculations” tab
- “Calculations” Tab:
 - Includes additional details and granularity on settings
 - The “Calculations” tab is also where you can run analyses within your Cross Tables including benchmarking, statistical analysis, mean value series, ranks, and correlation analyses. Click into the analysis you want to run, turn on the radio button to enable the test, and fill out the fields provided to you
 - Within the “Calculations” tab you can also access “Compute Variables” which allows you or your end users to create their own custom variables directly in the Cross Table:



- “Define answers” tab is where you will give the new variable a code, a name, choose how many answers it should have, and define the answer labels



- “Define calculations” tab is where you will define the expressions for each of your answer options:
 1. Select the answer option from the dropdown
 2. Select the variable from the Questions dropdown
 3. Select the answers from the answer list that displays below the selected question and “Add to expression”
 4. The expression box can be typed into via the keyboard or the buttons under the “Operator” sector can be used
 5. Standard Boolean Logic is used to set expressions
 6. Click “Save”



- This variable will now be at the bottom of the questions list under the “Rows, Columns and Filters” tab
- In the top right there is a button for “Templates”. Templates allow you to save default settings and variable selections.
 - Save a new template by giving it a name and choosing whether you want it on by default
 - You can access all saved templates from the Templates button in the top right corner, or directly within the “Rows, Columns, and Filters” tab when building your Cross Tables
- When exporting from the left-side panel, you can customize how your export functions:
 - You can export your entire workbook or just a selected sheet
 - You can also export all tables into one Excel sheet or to export all tables as separate Excel sheet

Additional Information

For further assistance during your trial, there are two ways you can seek help:

1. Review the [Knowledge Base](#) which offers training videos and a searchable database.
 2. E-mail the [Forsta Global Tech Sales](#) team if you need more one-on-one assistance.
- Dashboard demo examples: <https://demo.forsta.com/visualizations>
 - Data import tips: <https://forstavisualizations.zendesk.com/hc/en-us/articles/4410171502363-How-Should-My-Data-Look->

We are committed to ensuring the Forsta Visualizations tool meets your needs as you're going through this evaluation period.