Forsta



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 <u>www.Forsta.com</u> 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

	lions		ADMINISTRATE	LOGOUT
Select a project below to see	e reports based on your acce	ess rights		
PROJECT	LEVEL 1	LEVEL 2	LEVEL 3	
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	No Selection	✓No Selection	✓No Selection	~
DAPRESY DEMO 2021_Jilliane	Dapresy	Demos	2021	
DAPRESY DEMO 2021	Dapresy	Demos	2021	
		1 of 1 Showing 10 rows per page		

- 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

Proje	cts													
New proje	ect + 🗠 Download project list													
Folder level 1		~	Folder level 2			Folder level	3			Search			Q,	Ш
ID 🔻	PROJECT CODE	PROJE	CT NAME	STATUS	CREATED	BY	DATE CREAT	ED ACTIVE	USERS	LOCKED	CUST	OMER		
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113589	DAPRESY DEMO 2021_Jilliane	DAPRE	SY DEMO 2021_Jilliane	Draft	Riley@dapr	esy.com	2021-09-23				Dap a	Open		
55255	DAPRESY DEMO 2021	DAPRE	SY DEMO 2021	Published	Riley@dap	esy.com	2021-03-08				Dap e	Copy Delete		:



Back to Top

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.

Forsta Visualizations		Project Admins/Customers	System settings	\bowtie	Release notes Knowledge base Home / Logout
Active Project: 444914 - 444914 - Forsta Viz D	Demo				
Projects	view reports				
Start Project Settings Data Q	Questions & Answers Reporting Objects Porta	al Design Users			٩
Data Questions Portal tabs Rep	Project Settings				
Questions					
Save Create new variable					Meta data processing template
Q Search and Replace texts	lor - 🕲 Deactivate 🛄 Question blocks -				
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III 3 > BgSubscrType	Prepaid or Postpaid	% Single	Prepaid/Postpaid	T	
🗄 4 🔰 BgAgegroup	Age group	𝔅 Single	15-24/25-34/35-44	T	節
5 > BgGender	Gender	% Single	Male/Female	T	b
6 > BgIncome	Household Income	% Single	Less then 25 000/25 000-35 000 Euro/35 001	T	面
37 > BrAwaToM	Brand awareness Top of mind	% Single	Dapresy Telecom/Four/Swedish Telecom	T	ŵ
🗄 8 🔉 BrAwalM	Brand awareness In mind	Ø Multi	Dapresy Telecom/Four/Swedish Telecom	T	面
# 9 > AwaAdRecToM	Advertising awareness Top of mind	% Single	Dapresy Telecom/Four/Swedish Telecom	T	血
10 > AwaAdRecIM	Spontaneous advertising awareness - In mind	🛞 Multi	Dapresy Telecom/Four/Swedish Telecom	T	血
11 > Cons1	Brand Consideration - Dapresy Telecom	% Single	1 Not at all likely/2/3	T	□
:: 12 > Cons2	Brand Consideration - Four	% Single	1 Not at all likely/2/3	T	Ê



Global Text Changes

• Double click into any of the question labels in the "Text" column to make manual text edits

Start	Project Settings Data	Questions & Answers Report	ing Objects Portal	Design Users				٩
Data	Questions Portal tabs	Report users Project Settings						
Quest Save	tions Create new variable							Meta data processing template
Q Sear	rch and Replace texts 🚔 (Color - ③ Type - 丁 Set	as filters 🛛 ጰ Dead	ctivate D Question bloc	ks 👻			
🖂 Seleo	t All 1 of 52 selected	d						
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ii 5	> BgGender	Gender		^𝔅 Single	٠	Male/Female	T	ŵ

• 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

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Save	Cre and I	Replace texts 🛭 🍣 C	Color - 🕲 Deactivate 📴 Question blocks -					L	Meta data processing te
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ORD 🔺		CODE	TEXT	TYPE	COLOR	ANSWER BLOCK	FILTER	FILTER TEXT	
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4	>	BgAgegroup	Age group	% Single		15-24/25-34/35-44	T		
5	>	BgGender	Gender	% Single		Male/Female	T		
6	>	BgIncome	Household Income	% Single		Less then 25 000/25 000-35 000 Euro/35 001	T		
7	>	BrAwaToM	Brand awareness Top of mind	% Single		Dapresy Telecom/Four/Swedish Telecom	T		
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9	>	AwaAdRecToM	Advertising awareness Top of mind	% Single	•	Dapresy Telecom/Four/Swedish Telecom	T		
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11) >	Cons1	Brand Consideration - Dapresy Telecom	% Single	\circ	1 Not at all likely/2/3	T		
12	>	Cons2	Brand Consideration - Four	% Single		1 Not at all likely/2/3	T		
13		Cons3	Brand Consideration - Swedish Telecom	90 Single		1 Not at all likely/2/3			

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

𝘵 Cons1 - Brand Consideration - Dapresy Telecom



Х



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

Answe	r Block 1 Not at all likely/2/3 🖍			
😵 Cons1	- Brand Consideration - Dapresy Telecom			
Save	reate grouped answer 🔗 Apply Color Template 🛛 🛞 View questions connected t	o this Answer block 🔻		
💟 Select All	🔍 Search and Replace texts 🚦 Value sorting 👻 📑 Neg/Neu/Pos 👻 🖨 Answer	color 👻 🗘 Sort Answe		
ORDER A	ANSWER TEXT			
** 1	1 Not at all likely			
2	2	Croata		
÷ 4	4	Create	grouped ans	wer
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		🗌 Don't ki	now	

- 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.

Questio	ns						
Save	Create new variable						Meta data processing template
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ii 11	> Cons1	Brand Consideration - Dapresy Telecom	% Single		1 Not at all likely/2/3	T	臣
iii 12	> Cons2	Brand Consideration - Four	% Single		1 Not at all likely/2/3	T	Û



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 <u>here</u> to learn more about color management





Create New Variables

• Create a new variable by clicking "Create new variable" at the top of the Questions page

Start	Project Setti	ngs Data	Questions & /	Answers	Reporting Objects	Portal Design	Users						Q
Data	Questions	Portal tabs	Report users	Project Settings									
		•											
Ques	tions												
Save	Create n	ew variable	1										Meta data processing template
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∷ 2	> City	1	BgCity			% Sing	le		Boston/Chicago/Los Angeles		T		Ē
∷ 3	> BgS	SubscrType	Prepaid or F	Postpaid		% Sing	le		Prepaid/Postpaid		T		血

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

Cre	eate new variable ×
Ħ	COMPUTE A NEW VARIABLE WITH EXPRESSIONS Build your own variables such as new segments and target groups. For each compute choose the number of answer options required and build expressions to populate them. Expressions support logical and arithmetic operators for value creation.
å	MERGE VARIABLES TO A MULTIPLE CHOICE VARIABLE Merge variables with matching answer lists to create new multiple choice variables. As an example "Total" or "In mind" awareness variables can easily be created if the selected data contains each mentioned brand in the survey (like 1st mentioned brand, 2nd mentioned brand, 3rd mentioned brand etc.).
x	MERGE VARIABLES TO AN INDEX VARIABLE Create an Index variable based on multiple questions. The result of an Index is the mean value of the ingoing questions. The index can be calculated on respondent level or be an aggregated mean of the ingoing questions which allows assigning different weights, so a question can have more or less impact on the index than other questions.
9	ADD INPUT VARIABLE Input variables are used in Form reports to store user defined data, for example, the logged action and findings in a customer follow-up process. Input variables can be empty or built with expressions to populate them with predefined data. Expressions support logical and arithmetic operators for value creation.
52	CREATE WEIGHT Weights can be used in calculations within the system. You can create weights based on static groups or dynamically depending on imported data. You can also base your created weight on R.I.M.logic.

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- 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

mpute a	new variable	e with exp	press	ions)
Save											
Define answers D	efine calculations										
Code		Question te	ext								
Segment		Segment									
Туре		Number of	answer alte	rnatives							
Single choice so	ale	✓ 2									
Color 🔴											
Color 🔶	ally				Apply Color Categ	ory No selection	on			🗸 🗹 Use I	linked co
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- "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

Com	npute a	new variable with e	expressions			
Ans	e answers Der wer alternative Imported Variables	1 - Young Males	~]			
Vari	Ables CODE \$ Country City BgSubscrType BgAgegroup BgGender BgIncome BrAwaToM BrAwaToM AwaAdRecToM AwaAdRecToM AwaAdRecToM AwaAdRecToM AwaAdRecToM AwaAdRecTom AwaAdRecTom AwaAdRecTom AwaAdRecTom	QUESTIONS ♦ BgCountry BgCity Prepaid or Postpaid Age group Gender Household Income Brand awareness Top of mind Brand awareness Top of mind Brand awareness Top of mind Spontaneous advertising awareness - In r Brand Consideration - Dapresy Telecom	Answers 1 - Male 2 - Female Add to expression Add to expression	Operators & Function	COUNTRESPONSE Apply Function	
Resp	oondent Count: 5	81 (unweighte <mark>))</mark>				
Kes	Clear	Validate				

7. Click "Save"

• 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

Start	Project Settin	gs Data	Questions & Answ	ers Reporting Objects	Portal Design	Users					٩
Data	Questions	Portal tabs	Report users Proj Setti) gs							
Ques Save Q Sea	Create net	w variable e texts 🛛 🍣	Color 👻 😵 De	ctivate	cks -					Me	ta data processing template
💽 Sele	ct All 0 se	elected									Ξ
ORD	• COE	DE	TEXT		TYPE		COLOR	ANSWER BLOCK	FILTER F	LTER TEXT	
		Q			Q	\$			Q V		Q
≣ 1	> Cou	ntry	BgCountry		% Single	Э		United States/Canada	Y		≞

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

Cre	eate new variable	
	COMPUTE A NEW VARIABLE WITH EXPRESSIONS Build your own variables such as new segments and target groups. For each compute choose the number of answer options required and build expressions to populate them. Expressions support logical and arithmetic operators for value creation.	
ራ	MERGE VARIABLES TO A MULTIPLE CHOICE VARIABLE Merge variables with matching answer lists to create new multiple choice variables. As an example "Total" or "In mind" awareness variables can easily be created if the selected data contains each mentioned brand in the survey (like 1st mentioned brand, 2nd mentioned brand, 3rd mentioned brand etc.).	
x	MERGE VARIABLES TO AN INDEX VARIABLE Create an Index variable based on multiple questions. The result of an Index is the mean value of the ingoing questions. The index can be calculated on respondent level or be an aggregated mean of the ingoing questions which allows assigning different weights, so a question can have more or less impact on the index than other questions.	
5	ADD INPUT VARIABLE Input variables are used in Form reports to store user defined data, for example, the logged action and findings in a customer follow-up process. Input variables can be empty or built with expressions to populate them with predefined data. Expressions support logical and arithmetic operators for value creation.	
52	CREATE WEIGHT Weights can be used in calculations within the system. You can create weights based on static groups or dynamically depending on imported data. You can also base your created weight on R.I.M.logic.	

• "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:



- 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 Weigh	ht		
Save			
Code		Name	
Weight Demo	0	Weight Demo	
SETTINGS			
Method	eet weighting		
Weight within Full period	Target tolerance (%)	Automatic rescaling	int
SELECT VARIA	ARIFS	count is zero	
SELECT VARIABLES			
QUESTION CODE	QUESTION TEXT		
		٩)	All 🗸
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	50
Female	48.98	50
Sum (%)	100	100



4. 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

QUESTION CODE	QUESTIC	ON TEXT	*		
	٩ (Q		All
AwaAdRecToM	Advertisir	g awareness Top of mind			
BgAgegroup	Age group)			
City	BgCity				
Country	BgCountr	y		Add to weight table	Add as filte
BrAwaToM	Brand aw	areness Top of mind			
Cons1	Brand Co	nsideration - Dapresy Telecom			
DEF	INE TARGET DISTR	IBUTIONS if the sum is not equal	to 100%		
DEF	INE TARGET DISTR	BUTIONS if the sum is not equal Filter:	to 100% : BgCountry		
DEF	INE TARGET DISTR	BUTIONS if the sum is not equal Filter: United States	to 100% BgCountry	Canada	
DEF	INE TARGET DISTR	RIBUTIONS if the sum is not equal Filter: United States t (%) Target (%)	to 100% BgCountry Current (%)	Canada Target (%)	
DEF	INE TARGET DISTR Rescale Target values Current Ile 50.5	IBUTIONS if the sum is not equal Filter: United States t(%) Target (%) 9 50	to 100% BgCountry <i>Current (%)</i> 51.36	Canada Target (%) 50	
DEF R Ma Fen	INE TARGET DISTR Rescale Target values Current Ile 50.5 male 49.4	IBUTIONS if the sum is not equal Filter: United States t(%) Target (%) 9 50 1 50	to 100% BgCountry Current (%) 51.36 48.64	Canada <i>Target (%)</i> 50 50	

• 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

Questi	ons								
Save	Cre	eate new variable							Meta data processing template
Q Searc	h and	Replace texts 🛛 🐥 C	Color ▼ ③ Type ▼ ▼ Remove as Filter	r 😣 Deactivate 🔡 Questi	ion blocks 👻				
Select	All	1 of 52 selected	I						Ξ
ORD	•	CODE	TEXT	TYPE	COLOR	ANSWER BLOCK	FILTER	FILTER TEXT	
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81	>	Country	BgCountry	Single		United States/Canada	T	BgCountry	۵
	>	City	BgCity	% Single		Boston/Chicago/Los Angeles	7	BgCity	ĥ
ii 3	>	BgSubscrType	Prepaid or Postpaid	% Single		Prepaid/Postpaid			ŵ
ii 4	>	BgAgegroup	Age group	% Single		15-24/25-34/35-44		Age group	ŵ
ii 5	>	BgGender	Gender	% Single		Male/Female		Gender	Ê
ii 6	>	BgIncome	Household Income	% Single		Less then 25 000/25 000-35 000 Euro/35 00		Household Income	m
ii 7	>	BrAwaToM	Brand awareness Top of mind	% Single		Dapresy Telecom/Four/Swedish Telecom	T		節



Add Portal Tabs

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- 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

Project	s III Design/Preview reports	Dentel Design - Henry			0
Data	Questions Portal tabs Report users Settings	Portai Design — Users			4
Report	5				
Save	Add new report				
Select A	II 🥏 Publish 🔇 Unpublish Arrange 👻 🛅 Delete				
ORD 🔺	NAME	ТҮРЕ	PUBLISHED		
Q	٩	<u></u>	· · ·	٩	
⊞ 1	PPT Production Tool	StoryCreator	0	Ē	1
∷ 2	Dashboard	📊 StoryTeller	0	di d	I
Ш З	Cross Table	Cross Table tool 2.0	0	Ê	I
UNPUBLIS	HED PROJECT NOTE ③		han an tha an an an Anna		
Displayed in	Report user project selection page if no report is published				

Click <u>here</u> 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

Save Layout	<		
🛆 Export		EXPORT	×
SLIDES 🕀 🛃 🗇 🗇	•	Filters Total	Check all \Box
			Generate PPT report as images
			Generate PPT report as editable objects
			Generate PDF report
3.			Generate Excel report



Object Types

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

B Sav	e Layout												🕅 Labels	h Obje	ects (Preview
Start	Layout	Filters & Set	tings										Number of objects: 0/200		а. Т	1. 1.
				-		1		Q		<u></u>	2					
Templates library	Text & Media	Text	Image	Dynamic Image	icon / Shape	Chart	Table	Respondent Table	Word Cloud	Dynamic Icon/Shape	Add Slide	Slide options				
Templates			Text & Media					Data Obiects			Slie	- les				

- Text & Media:
 - Use HTML and JavaScript to embed videos or other web content. Users can also insert any URL to the dashboard
 - Click <u>here</u> 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

Variables Filters Settings Analysis Layout Events		Apply settings to other objects
FILTERING	PREVIEW	Update preview
Percentage share - Categorical questions		
	AXIS AND LEGEND	
Show Variable Subsets		
Show Question Block		
	L, Axis	Internal order ascending
SELECTION	🔅 💿 Interval (Full period)	
	Question (Brand Awareness Top of Mind)	
Questions		
O Show code		
Country	2 Deep and deep between and leaded	le suis s
City	prag and drop between and inside	Dottes
Prepaid or Postpaid		
Age Group		
BgGender- What is your Gender?	Legend	Internal order ascending
Household Income		
Brand Awareness Top of Mind	Answer (ABC Insurance, Goodsurance, Equal Insurance)	
Brand Awareness in Mind		
Advertising Awareness Top of Mind		
oponcaneous advertising awareness - In mind		
Answers		
Q Show code		
-All-		
ABC Insurance		
Goodsurance		
Equal insurance		
Easy insure HTM iosurance		
Duty Insure		
Tel Me More		
Davids Cours		
Donkycom		

 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

Variables Filter	s Setting	gs Analysis Layout	Ē,
FILTERS			0
Nest Comps	are Filters		
Prepaid or Postpaid		Age group	
No Selection		No Selection All	
Prepaid Postpaid		15-24 25-34 35-44	
Compare	*	45-54	
Gender		Household Income	
No Selection All Male Female	•	No Selection All Less then 25 000 25 000-35 000 Euro 35 001 - 45 000 Euro 45 001 - 55 000 Euro	
Compare		Compare	
HIERARCHICAL	GROUP SE	TTINGS	6



- 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

Color Template	~
Question	
Answer	
Color Template	
Filter	
Single Color	
Value based	
Auto	

- 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

Variables Filters	Settings Analysis La	yout
CHART		e
Chart type	Bar	~
Series options	Side by side	~
Invert chart	Show as polar	
Series color source	Auto	~
Legend position	Тор	~
Showyalues	No. of decimals	
Chart rendering	1 By shown decimals	v
Base size information	Base hidden	v
SERIES		e
TIME SELECTIONS		e
AXIS AND TEXT		e
TOOLTIP		e
CALCULATION		6
OTHER		1

- Chart Analysis
 - Apply analyses to any chart or table using the analysis tab
 - <u>Benchmarks</u> 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

BENCHMARK		\oplus	PREVIEW	Update previe
STATISTICAL ANALYS	ce tests	Θ	Dapresy Telecom - 25-34 Dapresy Telecom - 35-44 Four - 25-34 Four - 35-44 Swediah Telecom - 25-34 Swediah Telecom - 35-44 40% 30%	
Type Base limit	Two independent sample Z test Two independent sample Z test Two independent samples T-Tes	*	20%	
Respondent count limit	0		7% (·) 4% (·) 1% (·)	
Base size (?)	Weighted	~	0% Brand awarehass Top of mind	
Test between	Legend Items	~		Show
Test within	All items	~		Invert backg
Comparison type	First datapoint	~	AXIS AND LEGEND	
Comparison behavior	Leave comparison points	~	L, Axis	Internal order ascending
Significance level	1096	~	🗄 🧿 Interval (Full period)	
Symbols	±j:	~	😳 Question (Brand awareness Top of mind)	
Starting letter	No letter indicators	~	2 Drag and drop between and inside house.	
		\oplus		
PERCENTILE				

- 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.

Variables	Filters Settings Analys	is Layout
TEMPLATE	ES	e
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- J F M		
CHART BA	CKGROUND	0
SERIES		e
SERIES	A	(
SERIES GRID ARE AXES	A	(
SERIES GRID ARE AXES LEGEND	A	(H

- 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

Charts and tables now support events The event functionality, which allows you to create rich interactions driven by user actions is now also available in Charts and Tables. By using events in a chart or table object you can, for example, create a custom navigation by making a chart or a table a link to any other report or slide or you can add a tool-tip for a specific object that shows information about how to interpret the result. For more information check out the latest release notes. CLICK CLICK Link Link target StoryTeiller report Storyteller - Dashboard / Slide Slide 1 #1 (static text)	Charts and tables now support events The event functionality, which allows you to create rich interactions driven by user actions is now also available in Chart and Tables. By using events in a chart or table object you can, for example, create a custom navigation by making a chart or a table a link to any other report or silde or you can add a tool-lip for a specific object that shows information about how to interpret the result. For more information check out the latest release notes: CLICK C Link Link target StoryTeller report StoryTeller report Storyteller - Dashboard / Slide Slide 1 #1 (static text) Slide c 1 #1 (static text) Slide c 1 #1 (static text) Slide c 1 Slide c 2 Slide c 1 Slide c 1 Sli	riables Filters Settings Analysis L	ayout
CLICK	LICK Link Link Link Link Link Link Link Link	Charts and tables now support events The event functionality, which allows you to create rich interactions driven by user actions is now also available and Tables. By using events in a chart or table object you can, for ex create a custom navigation by making a chart or a table any other report or slide or you can add a tool-tip for a object that shows information about how to interpret th For more information check out the latest release notes	in Charts ample, a link to specific he result.
Link Link target StoryTeller report Report Storyteller - Dashboard / Slide Slide Slide 1 #1 (static text)	Link Link target StoryTeller report Report Storyteller - Dashboard / Slide Slide 1 #1 (static text) #1 (static text) Slide or object link? An object link goes to the slide where the object is located always A slide link goes to the specified slide number always Set default optional filters in link Tooltip	LICK	e
Link target StoryTeller report Report StoryTeller - Dashboard / Slide Slide 1 #1 (static text)	Link target StoryTeller report Report StoryTeller - Dashboard / Slide Slide 1 #1 (static text) Slide cr object link? An object link goes to the slide where the object is located always A slide link goes to the specified slide number always Set default optional filters in link Tooltip	Link	
StoryTeller report	StoryTeller report Report Storyteller - Dashboard / Slide Slide 1 #1 (static text) Slide or object link? An object link goes to the slide where the object is located always A slide link goes to the specified slide number always Set default optional filters in link Tooltip	Link target	
Report Storyteller - Deshboard / V Slide Slide 1 #1 (static text)	Report Storyteller - Dashboard / Slide Slide 1 #1 (static text) Slide cr object link? An object link goes to the slide where the object is located always A slide link goes to the specified slide number always Set default optional filters in link Tooltip	Story Teller report	~
Storyteller - Dashboard /	Storyteller - Dashboard /	Report	
Slide Slide 1 #1 (static text)	Slide Slide 1 #1 (static text) Slide or object link? An object link goes to the slide where the object is located always A slide link goes to the specified slide number always Set default optional filters in link Tooltip	Storyteller - Dashboard /	~
Slide 1 *1 (static text)	Slide 1 #1 (static text) Slide or object link? An object link goes to the slide where the object is located always A slide link goes to the specified slide number always Set default optional filters in link Set default optional filters in link	Slida	
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	Set default optional filters in link Tooltip	Slide or object link? An object link goes to the slide where the object i located always A slide link goes to the specified slide number alw	s vays
Slide or object link? An object link goes to the slide where the object is located always A slide link goes to the specified slide number always	Doottip	Set default optional filters in link	
Slide or object link? An object link goes to the slide where the object is located always A slide link goes to the specified slide number always Set default optional filters in link			
Slide or object link? An object link goes to the slide where the object is located always A slide link goes to the specified slide number always Set default optional filters in link Toottip		Tooltip	

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

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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 <u>here</u> to learn more about respondent table set up:

	T	T	T	¥ ^
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	6	
3	2019-01-03	Gives that extra service	1 Doesn't agree at all	
7	2019-01-03	Proffesional	5	
В	2019-01-03	Would definitely recommend		
9	2019-01-03	Proffesional		
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	() +
4				- F

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Word Cloud

- Word cloud:
 - A word cloud can be added to any storyteller report by selecting the word cloud ribbon in the admin toolbar
 - The size, layout and colors can be defined in the set-up screen
 - Word clouds are dynamic to any filter selection on the page

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

Dynam	nic ico	n / sha	ape		
Variables	Filters	Settings	Time	Icons	
COMPARISC	N TYPE				
What to compa	re against th	reshold values	8		
What to compa Single result Single result	re against th	reshold values	1		
What to compa Single result Single result Difference be	re against th	reshold values			1
What to compa Single result Single result Difference be Difference be	re against th tween 2 que tween 2 ans	reshold values stions wers	ž		
What to compa Single result Single result Difference be Difference be Difference be	re against th tween 2 que tween 2 ans tween 2 ans	reshold values stions wers wers in compa	are filter		

- 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

Variables Filters S	ettings Time Icons								
ICON/SHAPE SETTINGS									
Partly fill by value									
Value color	Background color								
Min scale	Max scale								
0	100								
Fill direction	Vertical								
Start value	Stop value								
Select >= 🗙 0	<= 🗙 100 Copy								

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

Librar	y i	ayout	Eve	ents																				
FILTER	ING																							
Icons																~								
ELEC.	TION																							
Search	non																Size							
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 See common use cases for dynamic icons below or click <u>here</u> to learn more about dynamic icons/shapes

Changing color	Changing rotation (and color)	Show icon dependent on value (e.g. alert)
Satisfaction with Service 68% Value for Money 70%	NPS Trend MoM Satisfaction Trend MoM Value for Money Trend MoM Image: Comparison of the state of the st	NPS:+5 Alert-loon is shown in case NPS Score falls below +15
Partly filled dynamic iconsImage: Displaying displayin	Partly filled dynamic icons Satisfaction with Service (in %) Maintenance General Repair Collision Repair 58% 60% 60% 60% 60% 60% 60% 60% 60	Traffic light build by using dynamic icons Satisfaction Value for Money Value Value for Money Value Value Value <td< td=""></td<>

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

REPORT FORMAT	e			
Slide size	PPT 18:9 (1280x720)			
	PPT 4:3 (960x720)			
Show PPT template as slid	e PPT 16:9 (1280x720)			
Activate device filtering	A4 landscape (1123x798) A4 portrait (798x1123) Small screen format (350x500) Custom			
NAVIGATION				
EXPORT FORMATS				

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
 - <u>Compare:</u> View a split between respondent types
- Choose other settings such as including a no selection or multi-select option to filters

Filters Variable subset Time periods Moving average Interval											
Filters		Split Filters 💋			N	est Compi	are series [Maximum number of compare to		
tive Filter name	Add no selection	Use as multiselect	Minimum selections	Maximum selections	Behaviour	Defa	ault behavi	our Default option	Sort order	Dynamic filtering	H
J] Prepaid or Postpaid		0			Filter	File	er.	Finititem will be selected	1 Internal order ascer 🗸	No V	
Age group	2		_		Filter & Comp •	• Filo	er	First item will be selected	• Internal order ascer 🗸	No 🗸	
Gender					Filter	• Filt	er	First item will be selected	0 Internal order ascer 🗸	No 🗸	
) Household Income	D.	B)			Filter	Fib	er.	First item will be selected	0 🛛 İnternal order ascer 🗸	No 🗸	Π

• Save to report and make appropriate data cuts

Age group	Gender		
25-34, 35-44	\$ No selection	0	UPDATE
🔿 Filter 🔘 Compare	 19		

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 <u>here</u> 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

DECKS	<	-Forsta Visualiz	ı zations
Save			
Save as	EXPORT	×	interactive dec
SLIDES OD OD	%DateTime%		√ Filters ar
+ New slide ~	*	Generate PPT report as images	R
-		Generate PPT report as editable objects	Spline
		Generate PDF report	·
		Generate Excel report	
1		My exports page (0) 🏴	

- 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:
 - <u>Calculation Types</u> you can choose which calculations are available and set global, default settings regarding units and decimals on the calculation level
 - <u>Decks</u> 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
 - <u>Slide Layout Templates</u> 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).

						U
QUESTIONS						Œ
CALCULATION TYPES						e
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Count - Categorical questions		1	~			
Significance testing	Type of test	bendent sample Z test bendent sample T test	Base size options Weighted Weighted - eff Unweighted -	in signific fective bas Option A (ance test formula (i) se (available in Z test only)	
 Benchmark calculations Rank Mean value series 			✓ Unweighted -	Option B	(named "Unweighted" in 1	r test)
FILTERS						Ð
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TIME PERIOD						Œ
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OBJECT TYPE	\oplus	CHART TYPE	6	Ð	SERIES OPTION	Œ
OBJECT TYPE	Ð	CHART TYPE	(Ð	SERIES OPTION	Œ
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OBJECT TYPE WEIGHTING BASE SIZE LIMITS DECKS SLIDE LAYOUT TEMPLATES	Đ	CHART TYPE	(Ð	SERIES OPTION	⊕ ⊕ ⊕
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OBJECT TYPE WEIGHTING BASE SIZE LIMITS DECKS SLIDE LAYOUT TEMPLATES EXPORT FORMAT COLOR TEMPLATES DEVICE FILTERING SMART FUNCTIONS	(+)	CHART TYPE		⊕	SERIES OPTION	

- 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 <u>here</u> to learn more about PPT templates:

System layout templates	8	C Layout master templates 🥡	
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	Br	owse	
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Annual Els have and and)
Accepted file types: .ppt, .ppt, .	pot, .potx		
1	8.2	7.55	
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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

Questions	Splits III Time selections			-14	Setup	25
SHOW RESULT AS	QUESTIONS	Show code	ANSWERS		Show cod	8
Percentage share	Select Question blocks 0	a)			Q,	
Count	₩ = BgCountry ₩ = BgCity ₩ = Prepaid or Postpaid ₩ = Prepaid or Postpaid ₩ = Prepaid or Postpaid ₩ = Gender ₩ = Gender ₩ = Brand awareness Top of mind ₩ = Strand awareness in mind ₩ = Spontaneous brand awareness - In mind - Swedish Ti ♥ = Spontaneous brand awareness - In mind - Swedish Ti ♥ = Spontaneous brand awareness - In mind - Telcom fi ♥ = Spontaneous brand awareness - In mind - Telcom fi ♥ = Spontaneous brand awareness - In mind - Tel Me Mu ♥ = Spontaneous brand awareness - In mind - Tel Me Mu ♥ = Spontaneous brand awareness - In mind - Tel Me Mu ♥ = Spontaneous brand awareness - In mind - Denty/Com ♥ = Spontaneous brand awareness - In mind - Denty/Com ♥ = Spontaneous brand awareness - In mind - MTC	stecom or You re	Alti- Dayray 7 decom Four Swedshift Talecom Swedshift Talecom Duty Catis Tel Me More Drift Me More Donne Cati Ocher Den't know		Ţ	
	Calcul	ite result				

- "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

② Questions	√ Filters and Splits	I Time selections				-14	Setup	55
APPLY FILTER	SAND SPLITS					Clea	ar all filter	5
Prepaid or Postpai	d .		Age group		Gender			
No filter applied	(Total base)	T A	25-34, 35-44	Y Y	No filter applied (Total base)		τJ	4
Household Income								
No filter applied	(Total base)	T Y						

- "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

Questions	\mathcal{V} Filters and Splits	Time selections					-14	Setup
APPLY TIME SI	LECTIONS							
Time period Full period		٥						
Interval Dav(s)	Week(s) Mr	onth(s) Quarter(s)	Halfvear	Yean's)	Full period	1		
Day(s)	week(s) M	onul(s) Quarter(s)	Hati year	Tear(s)	Putt pendu	1		

- 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

X Format chart Y 🏭 0.00 0.0 # Scale Move the A* A* A 🔛 defines settings Y	Apply analysis ~
	 G℃ Weighted/Unweighted data Benchmark Significance test
📕 Brand awareness Top of mind - 25-34 📕 Brand awar	Add Mean series

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-anddrop to change the order, or right-click to rename a sheet

WORKBOO	oks <
New	
🗇 Open	
💾 Save	
🔛 Save as	
Share	
🛆 Export to Exc	el 🕨
SHEETS	Export all sheets as separate sheets
	Export all tables as separate sheets
Hew sheet	Export all sheets into one single sheet
_	Export selected sheet(s) as separate sheets
Sheet 1	Export selected sheet(s) tables as separate sheets
	Export selected sheet(s) into one single 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

Rows, Columns and Filters	📰 Generate table (0 cells)	Templates 🐉 Full screen
Question blocks Select options •	SHEET 1 $\underline{\mathcal{L}}$ Transpose $\mathcal{J}_{\mathbf{x}}$ Split settings	
٩)	Filters	Columns
Show code	Time period Full period	
WTC		
Spontaneous advertising awareness - In mind - Donut Call	Drop variables to be used as Filters here	Drop variables to be used as Splits here
Spontaneous advertising awareness - In mind - Other		
Spontaneous advertising awareness - In mind - Don't know	Rows	
Brand Consideration - Dapresy Telecom		
😵 Brand Consideration - Four	🚍 Add as questions	
# Brand Consideration - Swedish Telecom	🙏 Add as splits	
P Brand Consideration - Sweet Talk	Y Add filters	
P Brand Consideration - Telecom for You		
P Brand Consideration - Duty Calls		
P Brand Consideration - Tel Me More	Drop variables to be used as Questions here	
😵 Brand Consideration - DonkeyCom		
P Brand Consideration - WTC		To create a cross table drag and drop variables into the respective drop-zone
Pand Consideration - Donut Call		
Familiarity [1]		
Familiarity (2)		
Familiarity (3)		
Familiarity [4]		
Familiarity (5)		

-Forsta

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.

Spontaneous advertising awareness - In mind - Support Tally	Rows		
Sweet talk Spontaneous advertising awareness - In mind - Telecom for You	Y☐ Table breaks		
Spontaneous advertising awareness - In mind - Duty Calls	BRAND CONSIDERATI ×	CREATE GROUPED AN SWER ×	
P Spontaneous advertising awareness - In mind -	Show code	Label	
Tel Me More	(P	Top 2 Box	
 Spontaneous advertising awareness - In mind - DonkyCom 	All	Answers	
P Spontaneous advertising awareness - In mind -	👯 1 Not at all likely	٩)	
WTC	<u>₩</u> 2	1 Not at all likely	Generate table
Spontaneous advertising awareness - In mind -	II 3.	2	Number of cells to be calculated: 18
Donut Call	<u>∥</u> 4	🗆 3	
P Spontaneous advertising awareness - In mind -	III 5 Very likely	Z 4	
Other	III Don't know	5 Very likely	
Spontaneous advertising awareness - In mind - Don't know	Add net/grouped answer	Don't know	
🚏 Brand Consideration - Dapresy Telecom 🛛 💳		Save	
😵 Brand Consideration - Four 🛛 💻 🦊			

- 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

Itters	Columns	
Time period Last 2 Year(s)	Age group 6 of 6 selected	Household Income 3 of 8 selected
tows Table breaks Brand Consideration - Dapresy Telecom 7 of 7 selected		
 Brand Consideration - Four 7 of 7 selected Brand Consideration - Swedish Telecom 7 of 7 selected 		Generate table Number of cells to be calculated: 189

- 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

Rows, Columns and Filters	Generate table (189 cells)	📕 Tempistes	Full screen
@~ J_x~ [52])⊡ ≣`` ™ ` ø` <u>∠</u> I	T L	

- 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:

Rows, Columns and Filters	Calculations	Generate table (159 cells)	Templates	Full screen
ST	ANDARD CALCULA	TIONS		
B/	ASE SIZE OPTIONS			
SI	GNIFICANCE TESTI	NG Contraction of the second		
B	ENCHMARK			
R	ANK			
CC	OMPUTE VARIABLE	S		
	Compute variables			

 "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

ve	culations		
Code New Variable]	Number of answe
eport text			
	1d 1 2	Report text	

- "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"

Save state of the sale of the		
Answer alternative 1 - 1 Questions (Question id - Code - Report text)	~	
1-Country - BgCountry		
Answers alternatives of selected Question	Expression	
1 - United States 2 - Canada		
	-	
Onarstar		
operator		
= V Add to expression		

- 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 <u>Knowledge Base</u> 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: <u>https://demo.forsta.com/visualizations</u>
- Data import tips: <u>https://forstavisualizations.zendesk.com/hc/en-us/articles/4410171502363-How-Should-My-Data-Look-</u>

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