

Forsta Visualizations August 2024 Release



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1.Introduction

This document describes new and improved features in the Forsta Visualizations 2024 August Release.

If you would like to know more about these features, please contact the support team at visualizationsSupport@forsta.com and they will be able to assist you.

Best Regards,
Forsta Team



2. Overview

StoryTeller

- Filter information text in Tables

In StoryTeller, we've added a new feature that allows you to display filter text within table objects. You can customize the font size, text color, background color, and text alignment. This feature is enabled by default for new table objects.

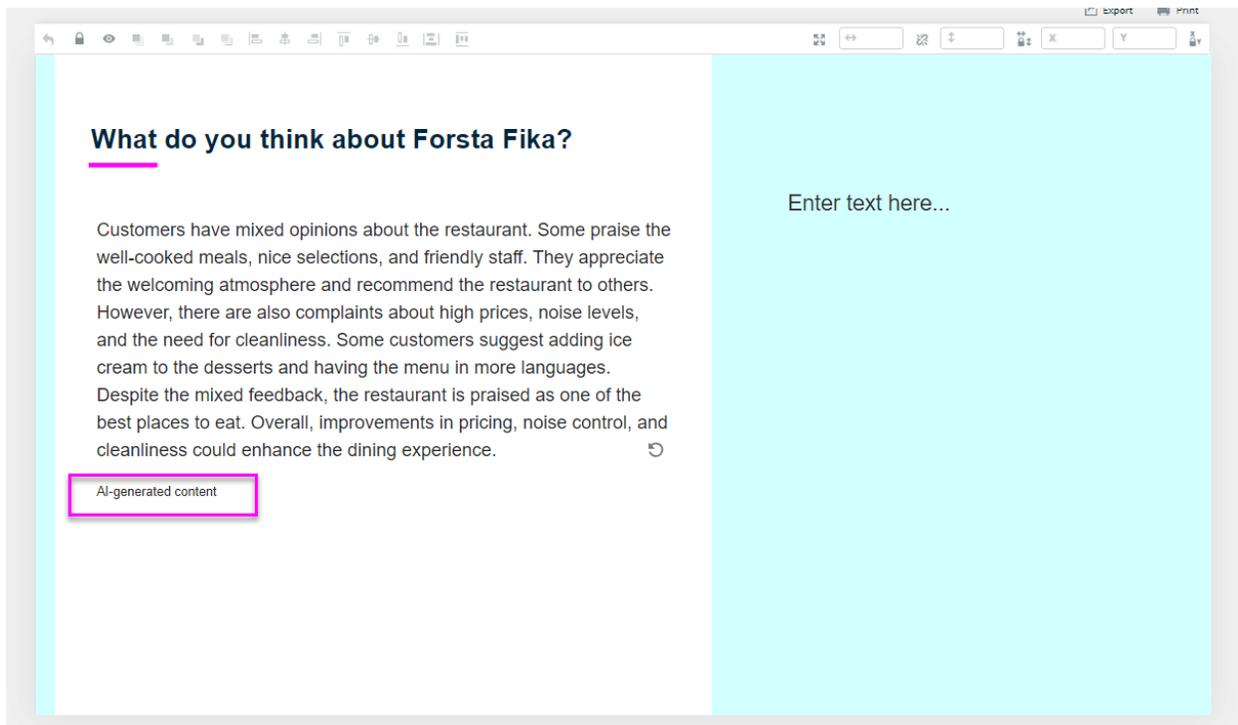
The screenshot shows the StoryTeller interface for configuring a table. On the left, the 'TABLE STYLING' panel is open, showing settings for 'Base information text' and 'Filter information text'. The 'Filter information text' settings are highlighted with a pink box, showing a font size of 11 and text alignment of 'Left'. On the right, the 'PREVIEW' section shows a table with the following data:

	Forsta Fika	Espresso Express	The Busy Bean	Boston Barista	Cup o' Joe	None of the above
Would you please list the first brand that comes to mind thinking of coffehouses	8.8	16.1	16.4	17.3	16.4	25.0
Would you please list all other brands that comes to mind thinking of coffehouses.	49.4	50.9	51.5	50.2	52.5	49.1
Which of the following brands do you recognize?	51.8	50.5	51.1	52.0	51.2	50.0
Which of the following brands are you familiar with?	51.3	49.2	51.4	51.4	51.2	51.3
Which of the following brands would you consider?	48.5	52.0	49.7	50.4	52.0	51.0
Which brand do you prefer?	8.5	15.7	16.5	16.9	16.9	26.5
Filter: HierarchicalFilter = Total						

Below the table, the 'ROWS AND COLUMNS' section shows 'Rows' and 'Interval (Full period)'.

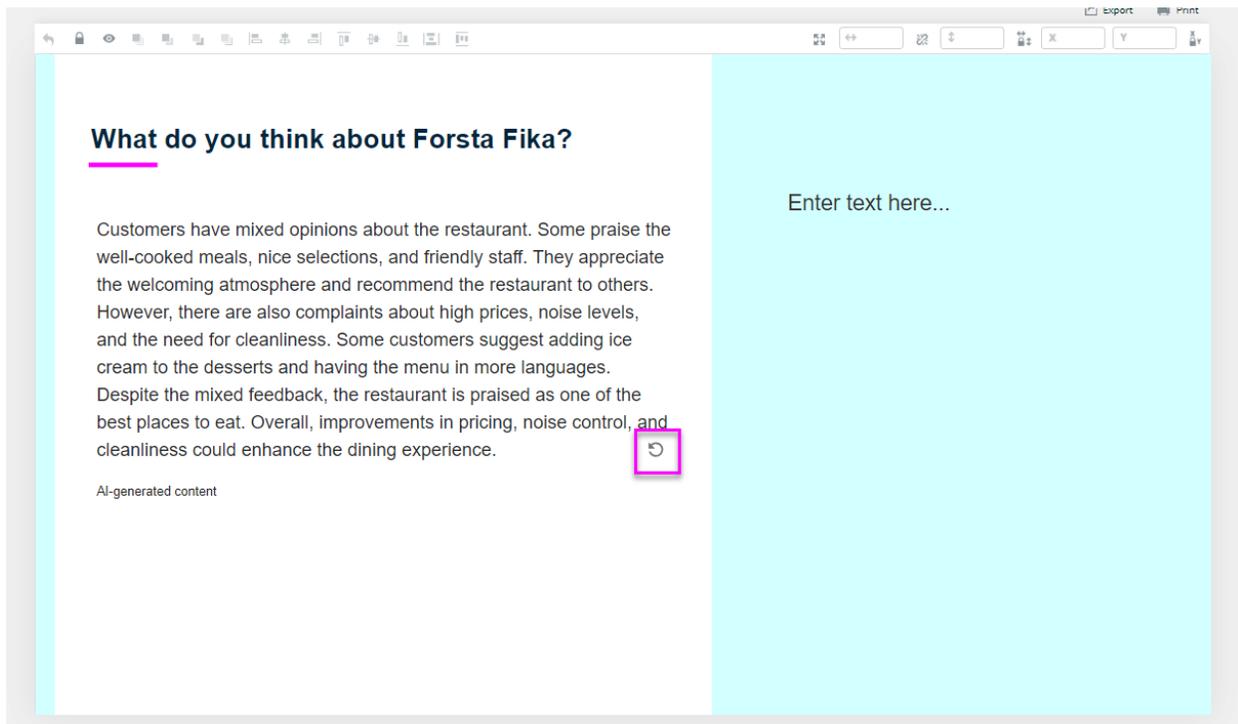
- Disclaimer text in Summary objects

In our latest version, we've added a disclaimer text to our Summary objects. This text is enabled by default and appears as a footer in the object. This text can be modified, moved into a tooltip or removed completely.



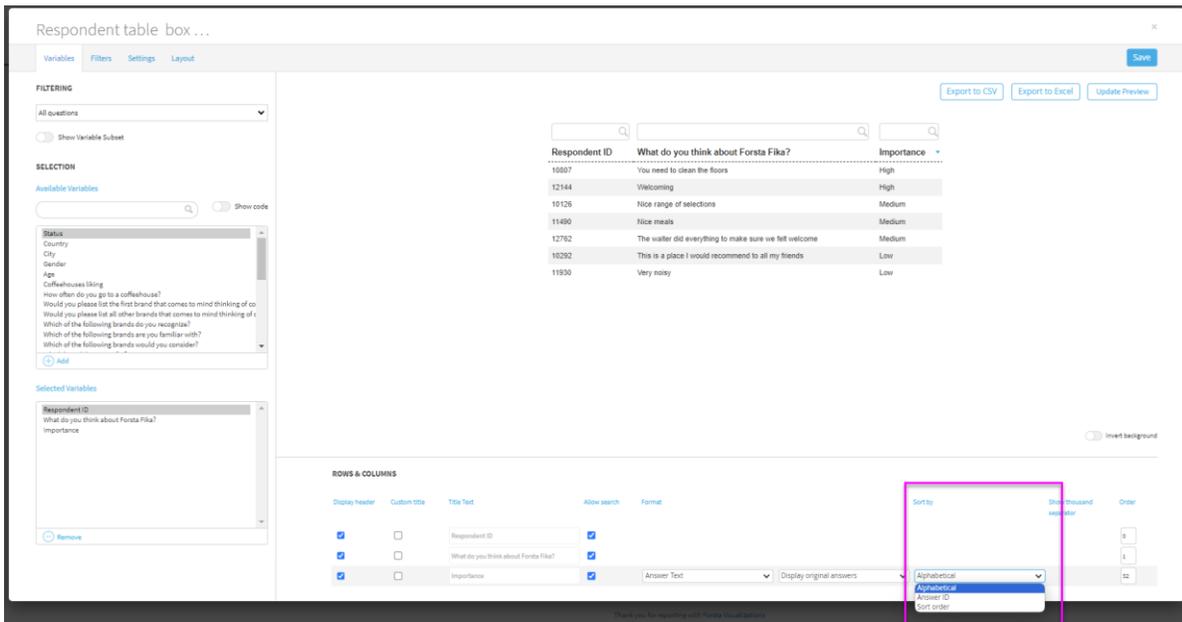
- Refresh button for Summary

We've also added a refresh button for Summary objects, allowing any user to generate a new version of the text. Currently, this button is included in all objects, but in an upcoming version, it will be possible to remove it completely. For now, it's connected to the Header. If no Header is added, the button is placed underneath the text, as shown in the image below.



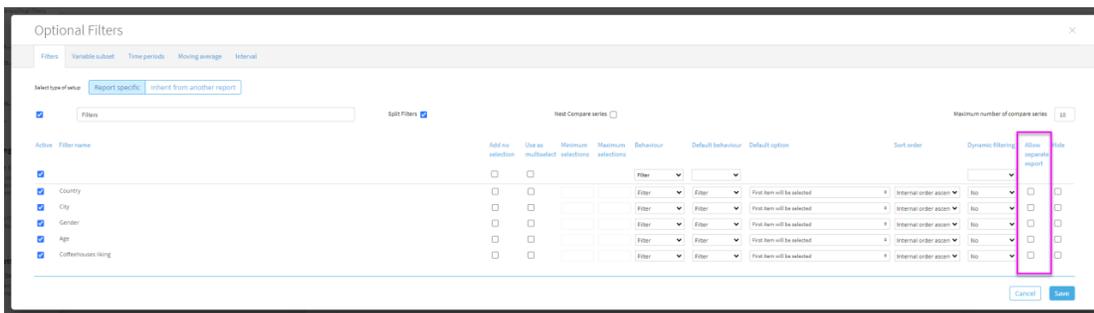
- Additional sorting options for categorical question in Respondent Table

To enhance the appearance of our Respondent tables, we've introduced the ability to specify the sorting method for each categorical column when using column header sorting. The new options available are "Answer ID" and "Sort order." The existing sorting method, "Alphabetical," remains the default option.

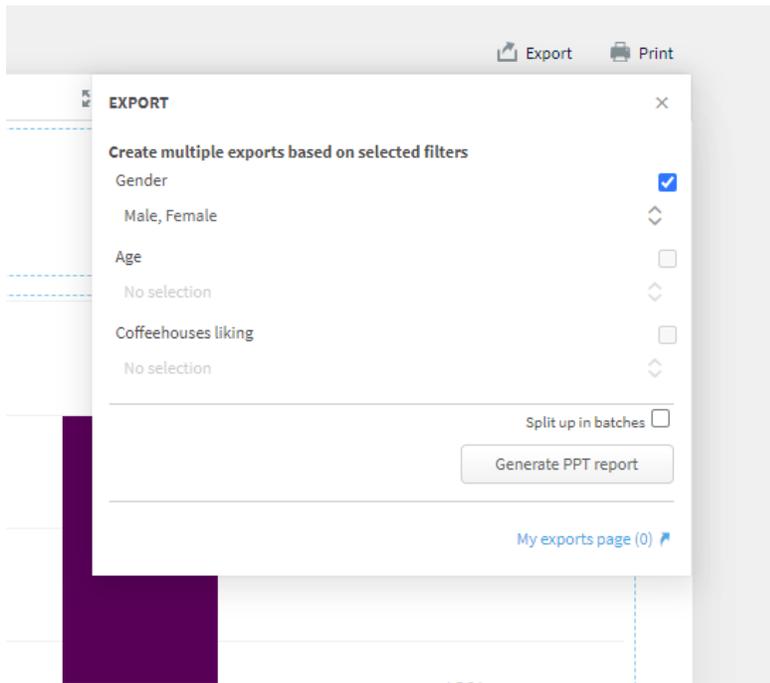


- StoryTeller Export – Create multiple exports based on filter

In StoryTeller, we've now added the option to generate multiple exports based on filter selections, just as hierarchy filters can produce multiple exports at once. To enable this functionality, select the filters you want to use as export filters within StoryTeller.



Choose the filter and the answer alternatives that the exports should be based on.



NOTE!

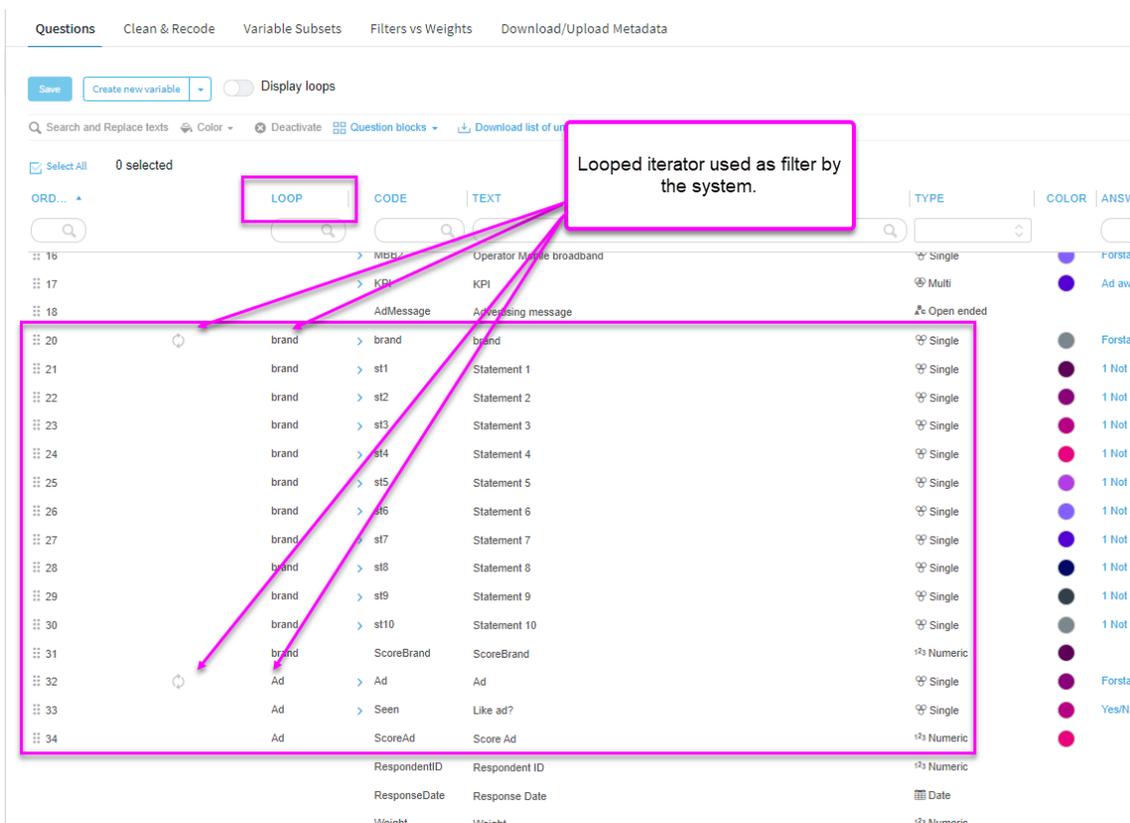
Only one filter can be used at a time. If the hierarchy filter is enabled in the report, single export selection is allowed together with filter exports. If multiple nodes are selected to be exported separately from the hierarchy filter, additional filter options can not be added.

Data management

- Add "Loop iterator" to loops in import

As a first step to simplify the use of looped data within our data objects, we've developed a method to set the "Loop Iterator", the question that should be used as a filter, during the import process. This ensures accurate calculations in the objects and clarifies which questions are included in a loop.

The image below shows two loops and how the Loop Iterators are displayed on our Question page and indicates which questions belong to a loop.





Data connectivity

- Additional information available in Activation log for Duplicated Respondent ID's message

If you encounter a message or error related to Respondent IDs during our activation process, it could indicate one of three things: duplicated Respondent IDs, missing Respondent IDs for looped data, or a warning for missing Respondent IDs in updates to existing data. In all these cases, it's useful to identify the specific Respondent IDs involved and check which batches they were previously imported in, if applicable. We've implemented this functionality through a new downloadable Excel file in our activation log.

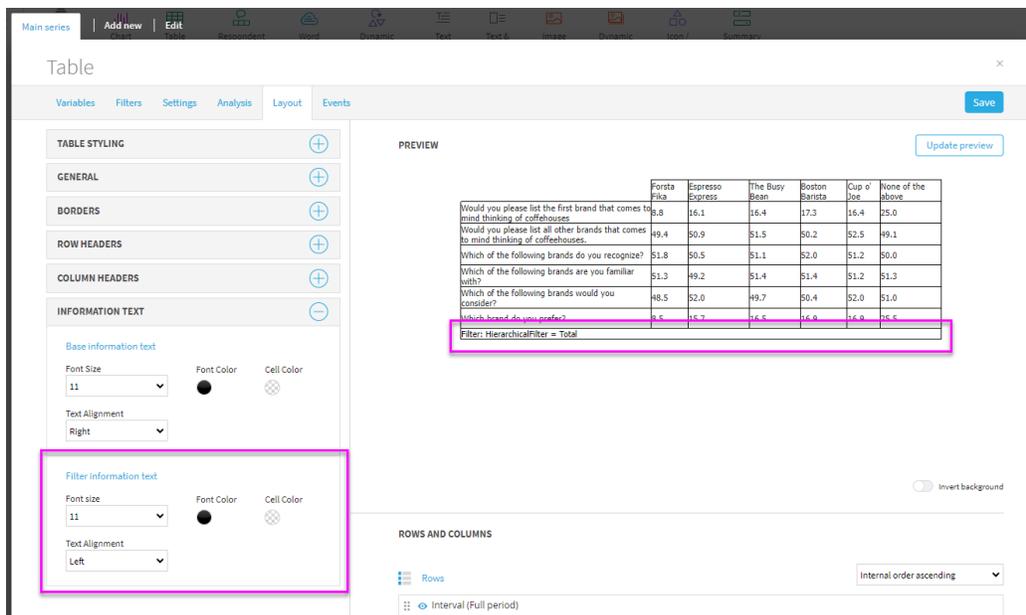
The screenshot displays the Forsta HX Platform interface. On the left, the 'Activation Log' shows a table of activation records. The record for Activation ID 13 is highlighted in red, indicating a 'Failed' status. A message 'Duplicated Respondent IDs' is visible in the log details. On the right, an Excel spreadsheet titled 'Respondent ID' is open, showing a list of Respondent IDs in column A and their corresponding Batch IDs in column B. The data in the spreadsheet is as follows:

Respondent ID	Batch IDs
10001	1,2
10002	1,2
10003	1,2
10004	1,2
10005	1,2
10006	1,2
10007	1,2
10008	1,2
10009	1,2
10010	1,2
10011	1,2
10012	1,2
10013	1,2
10014	1,2
10015	1,2
10016	1,2
10017	1,2
10018	1,2
10019	1,2
10020	1,2
10021	1,2
10022	1,2
10023	1,2
10024	1,2
10025	1,2
10026	1,2
10027	1,2
10028	1,2
10029	1,2
10030	1,2

3. StoryTeller

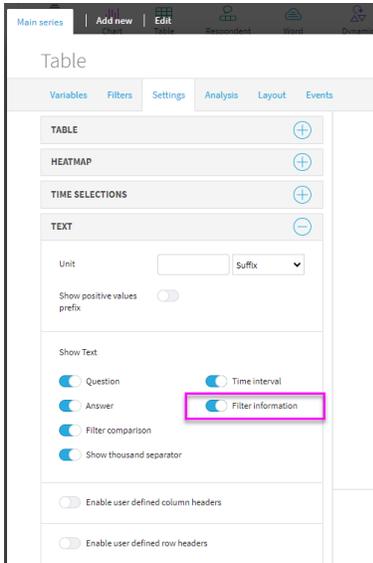
3.1 Filter information text in Tables

In StoryTeller, we've added a new feature that allows you to display filter text within table objects. You can customize the font size, text color, background color, and text alignment. This feature is enabled by default for new table objects.

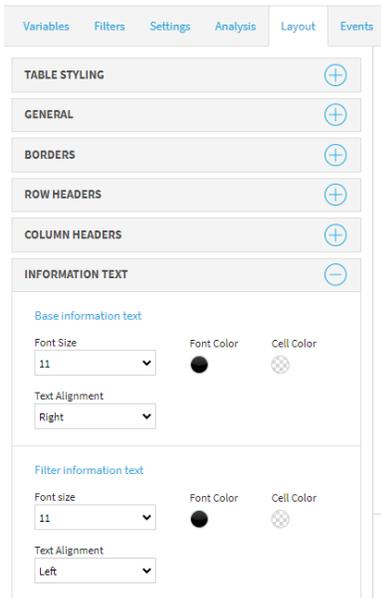


How to enable and customize font

In StoryTeller, this feature will be enabled by default for all new tables, just like filter text in charts. If you wish to disable it, go to "Settings" and then "Text".

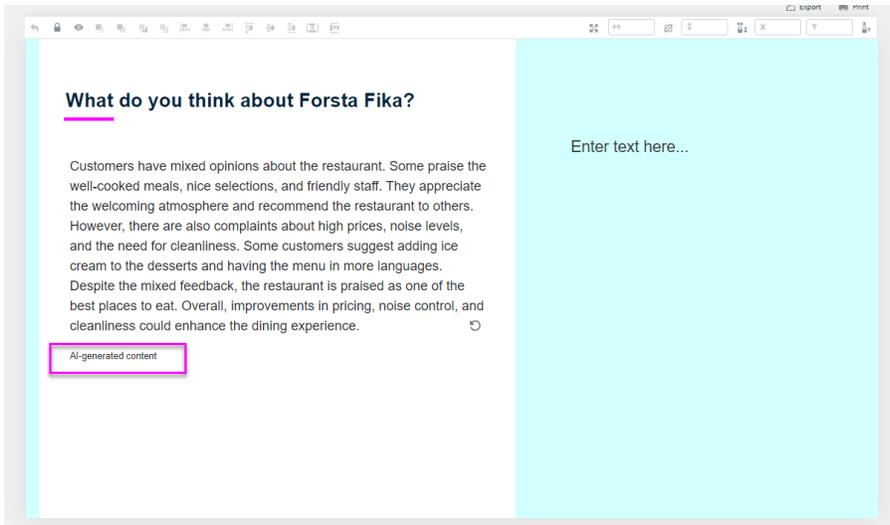


You can customize it under “Layout” and “Information Text.” Additionally, we’ve added the option to modify the style of the base information text as well.

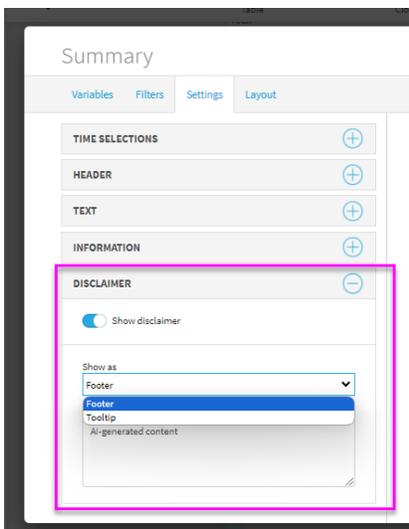


3.2 Disclaimer text in Summary objects

In our latest version, we've added a disclaimer text to our Summary objects. This text is enabled by default and appears as a footer in the object.

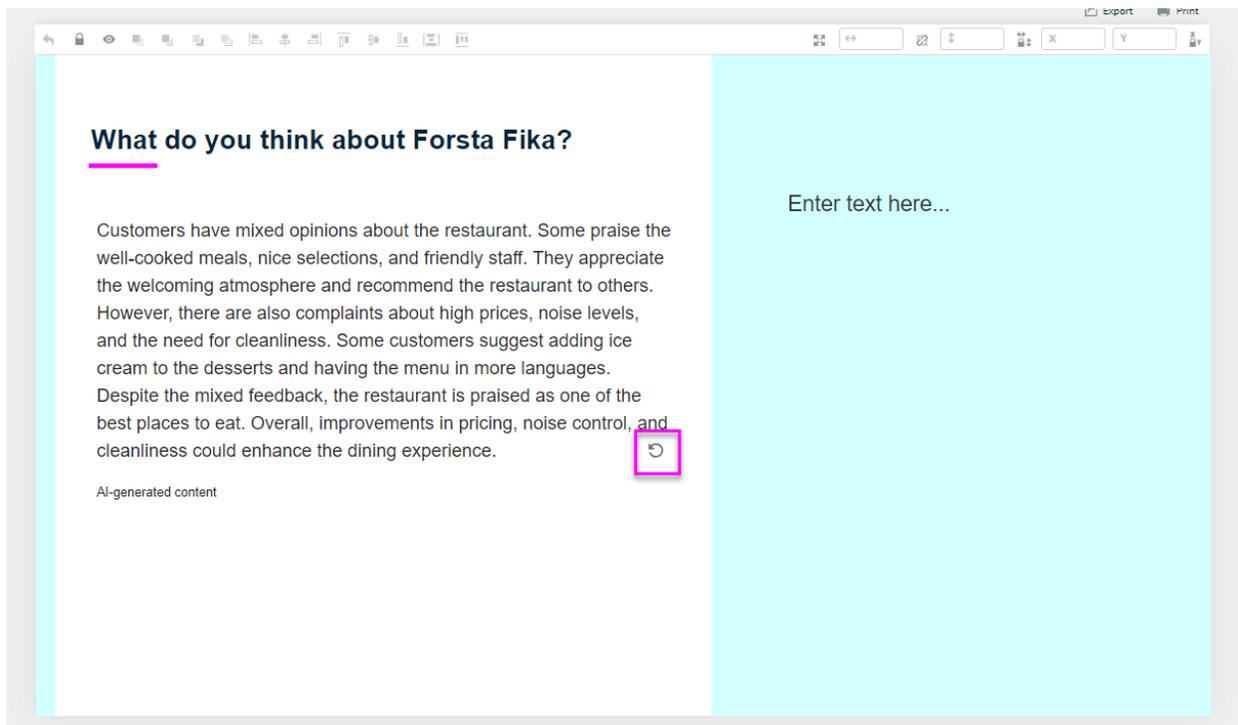


This text can be modified, moved into a tooltip or removed completely under the section "Disclaimer" in the object.



3.3 Refresh button for Summary

We've also added a refresh button for Summary objects, allowing any user to generate a new version of the text. Currently, this button is included in all objects, but in an upcoming version, it will be possible to hide it. For now, it's connected to the Header. If no Header is added, the button is placed underneath the text, as shown in the image below. The refresh allows users to get a new text from the AI used for analysis.



3.4 Additional sorting options for categorical question in Respondent Table

To enhance the appearance of our Respondent tables, we've introduced the ability to specify the sorting method for each categorical column when using column header sorting. The new options available are "Answer ID" and "Sort order." The existing sorting method, "Alphabetical," remains the default option.

The screenshot shows the 'Respondent table' interface. On the left, there are panels for 'FILTERING' and 'SELECTION'. The main area displays a table with columns for 'Respondent ID', 'What do you think about Forsta Fika?', and 'Importance'. Below the table is a 'ROWS & COLUMNS' section with checkboxes for 'Display header', 'Custom title', and 'Title text'. A 'Sort by' dropdown menu is open, showing options: 'Alphabetical', 'Answer ID', and 'Sort order'. The 'Importance' column is currently selected for sorting.

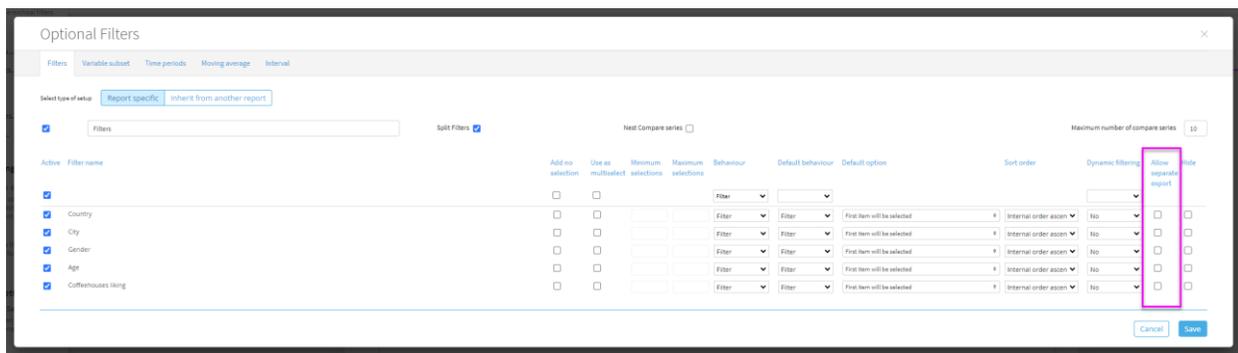
Respondent ID	What do you think about Forsta Fika?	Importance
10597	You need to clean the floors	High
12144	Welcoming	High
10126	Nice range of selections	Medium
11490	Nice meals	Medium
12762	The waiter did everything to make sure we felt welcome	Medium
10292	This is a place I would recommend to all my friends	Low
11930	Very noisy	Low

Below you see the same table but with different selection of the sorting.

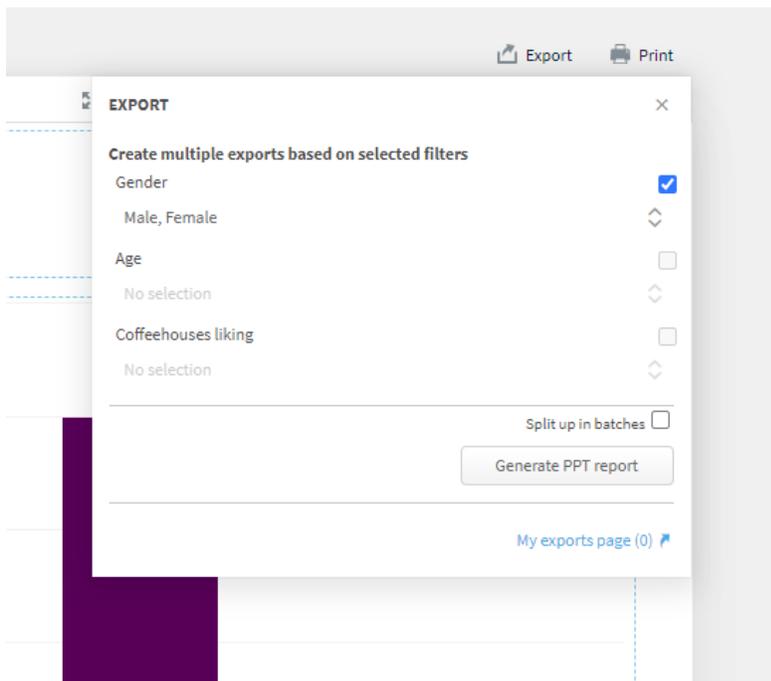
The two screenshots show the 'Respondent table' interface with different sorting selections. The left screenshot shows the 'Importance' column selected for sorting, with a 'Sort by' dropdown menu open showing 'Alphabetical' selected. The right screenshot shows the 'Answer ID' column selected for sorting, with a 'Sort by' dropdown menu open showing 'Answer ID' selected.

3.5 StoryTeller Export – Create multiple exports based on filter

In StoryTeller, we've now added the option to generate multiple exports based on filter selections, similar to how hierarchy filters can produce multiple exports at once. To enable this functionality, select the filters you want to use as export filters within StoryTeller.



Choose the filter and the answer alternatives that the exports should be based on.





NOTE!

Only one filter can be used at the time. If the hierarchy filter is enabled in the report, single export selection is allowed together with filter exports. If multiple nodes are selected to be exported separately from the hierarchy filter, no additional filter options can be added.

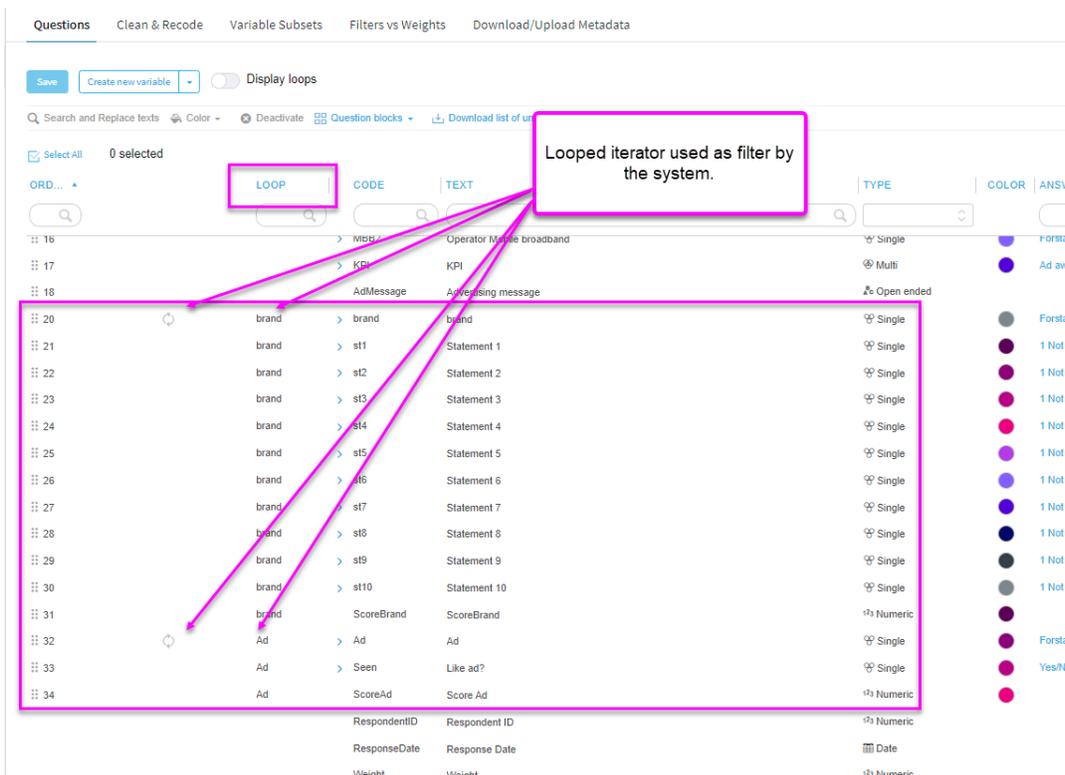
4.Data management

4.1 Add “Loop iterator” to loops in import

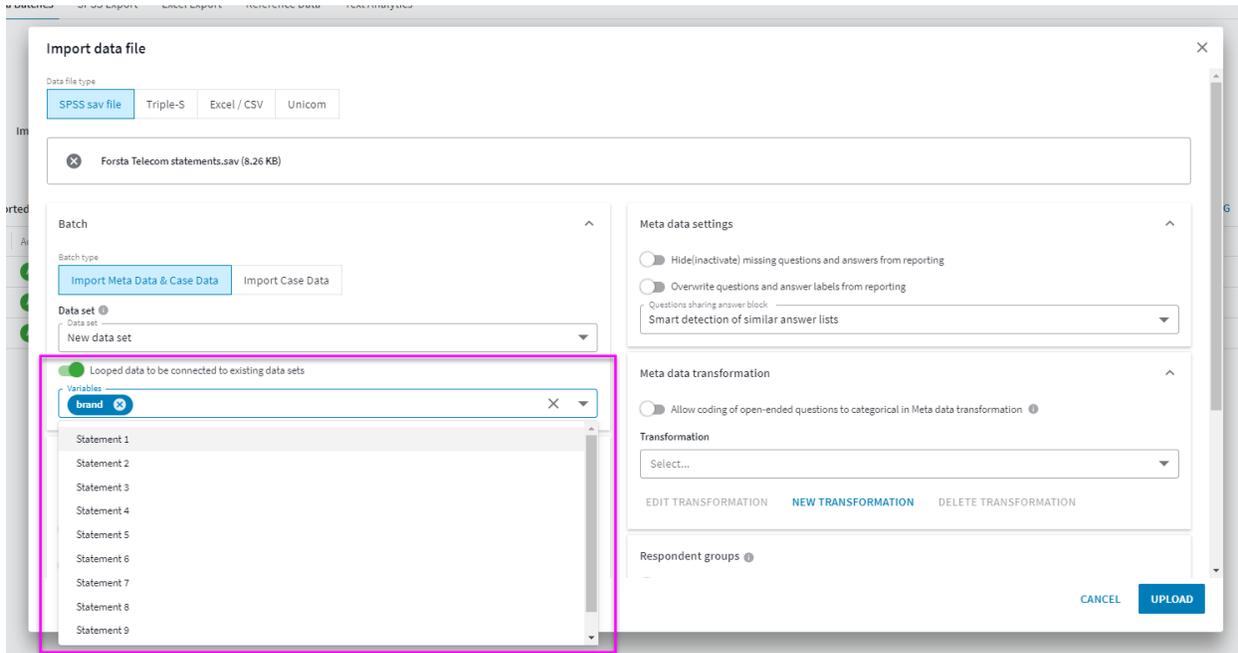
As a first step to simplify the use of looped data within our data objects, we’ve developed a method to set the “Loop Iterator”, the question(s) that should be used as a filter, during the import process. This ensures accurate calculations in the objects and helps clarify which questions are included in a specific loop.

The image below shows how the Loop Iterators are displayed on our Question page and indicates which questions belong to each loop.

Questions selected to be “Loop iterators” will automatically be set as filters, and these filters can’t be disabled.



In the import, once “Looped data to be connected to existing data sets” have been enabled, a new dropdown is shown, where all categorical questions in the file is shown.



This new item is part of the “meta data” and must be used for all subsequent imports for that loop.

NOTE 1!

It's not mandatory to select any “Loop iterator”. Existing project should be kept in the same ways as they are today, without “Loop iterator” and new projects can start to use this. If there is any need to add “Loop iterator” in already existing projects, please contact your CSM/AM, and they will be able to send in a service request to our Tech Team to see if this is possible in your specific project.



NOTE 2!

If a loop has been imported with question Brand as “Loop iterator”, the question Brand will always be used as iterator in the import. If Brand is not selected, you will be prompted with a message stating that wrong iterator is selected and to continue the import, the system will use the question Brand as “Loop iterator”. This means that the meta data for your loops must be consistent during the project’s life, just as regular meta data needs to be.

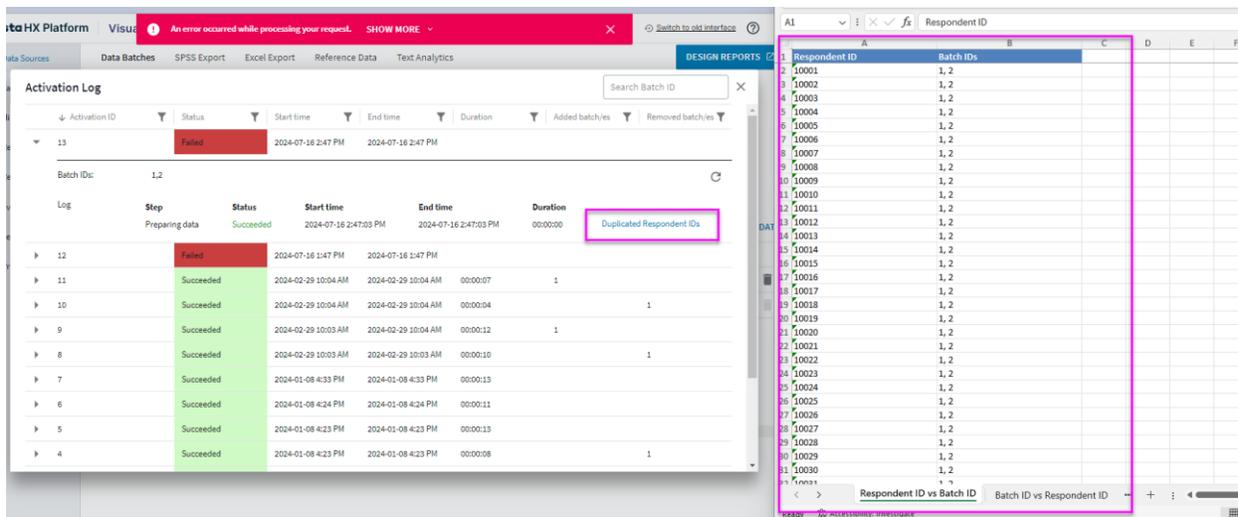
[IMAGE]



5.Data connectivity

5.1 Option to download additional information in Activation log

If you encounter a message or error related to Respondent IDs during our activation process, it could indicate one of three things: duplicated Respondent IDs, missing Respondent IDs for looped data, or a warning for missing Respondent IDs in updates to existing data. In all these cases, it's useful to identify the specific Respondent IDs involved and check which batches they were previously imported in, if applicable. We've implemented this functionality through a new downloadable Excel file in our activation log.



Depending on the message/error you got, different files will be shown.

The different versions of the downloaded file are

Duplicated Respondent ID's for New data

- The activation will not be finished.
- The link will download a file showing two sheets, "Respondent ID vs Batch ID" or "Batch ID vs Respondent ID"
- All Respondent ID's that are duplicated will be shown, together with the batches they are imported in.



Missing Respondent ID's for Looped data

- The activation will not be finished.
- The link will download a file showing all Respondent ID's that doesn't exist in the "main data" set.

Warning for Missing Respondent ID's for Updates to existing data

- The activation will be finished, this is just a warning message.
- The link will download a file showing all Respondent ID's that are missing a correlated ID in the main data set.