

Forsta Visualizations August 2025 Release



- Forsta Visualizations August 2025 Release 1
 - 1. Introduction 3
 - 2. StoryTeller 4
 - 2.1 Research Agent – Coming soon 4
 - 2.2 StoryTeller UI updates 9
 - 2.3 AI Computes – Full version 12
 - 2.4 Summary object 12
 - 2.5 Chart tooltip – Respondent count 13
 - 3. Data connectivity 14
 - 3.1 Download imported file 14
 - 4. Project administration 15
 - 4.1 Color template update 15



1.Introduction

This document describes new and improved features in the Forsta Visualizations 2025 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. StoryTeller

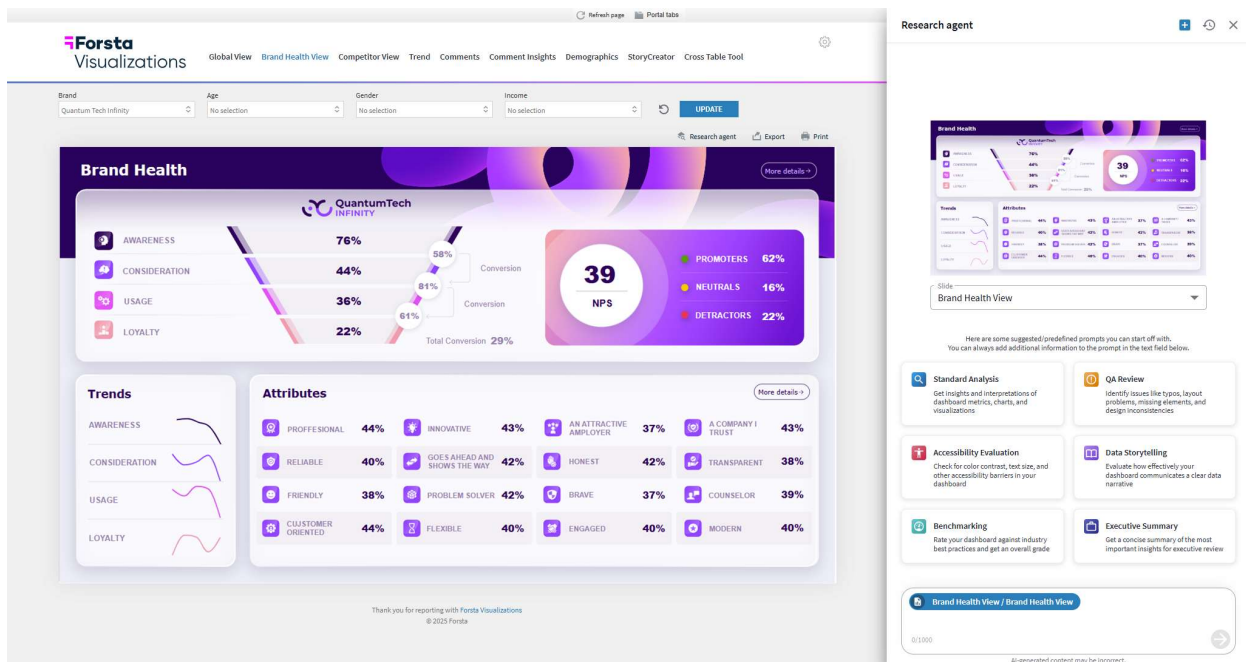
2.1 Research Agent – Coming soon

We're happy to introduce the Research Agent, your intelligent assistant designed to support you directly within your Dashboard. Think of it as your analytical sidekick, ready to help you enhance slide layouts, generate executive summaries, and provide design recommendations.

To try the functionality, reach out to your Forsta representative for guidance on how to gain access. You can also explore the functionalities by visiting our demo site <https://demo.forsta.com/visualizations/>

The Research Agent can be enabled on a per-project basis. Once activated, it will be available across all StoryTellers within that project. Initially released as an admin feature, it will later be accessible to all user types, including Report Users.

As illustrated below, you'll find a selection of suggested prompts to get started. You can also enter your own custom prompt in the text field at the bottom of the panel.



As an example, selecting the “Executive Overview” prompt, the Research Agent generates a concise summary based on the content of your slide.

Research agent
+
↺
×

Brand Health View / Brand Health View

Analysis Result Executive Summary

1. **The Big Picture:**

Brand awareness is strong, but conversion to loyalty remains low, signaling a need to strengthen customer retention and advocacy.
2. **Key Metrics:**
 - Awareness: 76% (high, stable trend)
 - Consideration: 44% (moderate, fluctuating trend)
 - Usage: 36% (declining trend)
 - Loyalty: 22% (low, declining trend)
 - Net Promoter Score (NPS): 39 (62% promoters, 22% detractors)
3. **Areas of Concern:**
 - Low loyalty (22%) and declining usage indicate weak retention.
 - Total conversion rate from awareness to loyalty is only 29%.
4. **Opportunities:**
 - High brand awareness (76%) provides a strong foundation for growth.
 - NPS is positive (39), with a majority of promoters (62%) who can be leveraged for advocacy.
5. **Recommended Actions:**
 - Launch targeted retention initiatives to boost loyalty and usage among

← BACK
↺ PAST ANALYSIS
START NEW ANALYSIS



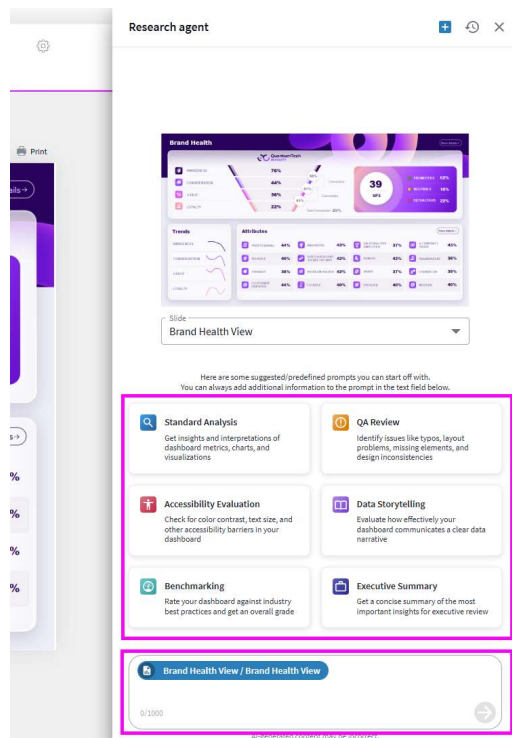
How does it work?

The Research Agent uses visual analysis to offer suggestions for improvement, generate insights, or provide a high-level overview of your slide. It does not connect to your data (meta data or raw data), ensuring that all outputs are based solely on the values and content you've created in your report.

To begin, select the slide you wish to analyze. By default, the slide you are looking at will be selected. This can be changed through the dropdown underneath the preview of the slide. After that you can either:

- Enter a custom prompt in the text field at the bottom of the panel, or
- Choose from predefined prompts by clicking on any of the available tiles.

If you select a predefined prompt, you can further refine the output by adding additional instructions or context.

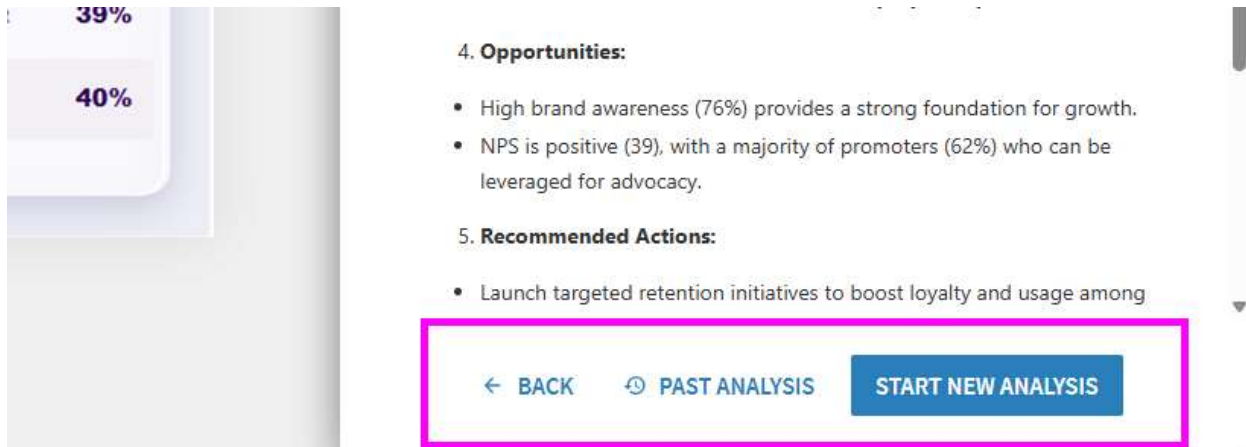


The output

The Research Agent's response will appear as text in the panel, as shown in the example images.

You can navigate through your interactions using the following options:

- **BACK** – Return to your previous prompt.
- **PAST ANALYSIS** – View a list of previously executed prompts.
- **START NEW ANALYSIS** – Initiate a new analysis session.



Data Security

As always, your data privacy and security are our top priorities. Here's how your data is handled with Azure OpenAI:

Your report screenshots (inputs) and AI-generated items (outputs):

- Are NOT available to other customers.
- Are NOT available to OpenAI.
- Are NOT used to improve OpenAI models.
- Are NOT used to improve any Microsoft or third-party products or services.
- Are NOT used for automatically improving Azure OpenAI models. The models are stateless and do not retain data from your interactions.



The Azure OpenAI Service is fully controlled by Microsoft. Microsoft hosts the OpenAI models in their Azure environment, and the service does NOT interact with any services operated by OpenAI (e.g., ChatGPT or the OpenAI API).

Your data will be kept in the same region as your server.

Notes on Reliability of Large Language Models

Large language models like Azure OpenAI are powerful but not perfect. Here are some key points:

- Context Understanding: The AI does well with context but can sometimes misinterpret unclear or complex inputs.
- Data Quality: High-quality survey responses give better results. Poorly written responses can affect accuracy.
- No Learning from Use: The AI doesn't learn from your input, ensuring your data stays private.
- Human Review: Always review AI-generated outputs to ensure they meet your needs and expectations.

2.2 StoryTeller UI updates

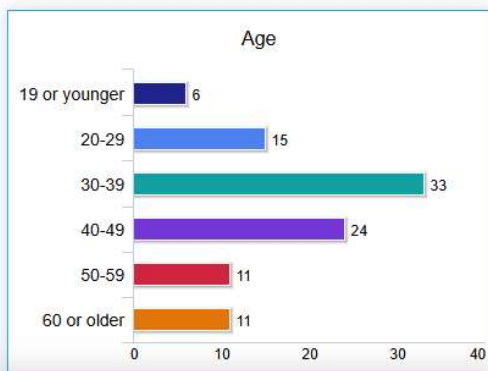
As part of our ongoing UI improvements in StoryTeller, we've introduced a refreshed visual design for smaller panels within reports.

To use the new UI, enable "Use new StoryTeller setup layout" under Project settings -> Beta settings in your project.

NOTE! There are no new or removed features, but the position and/or how they look may have changed.

Key enhancements include:

- **Element Tags** – individual tags for each object

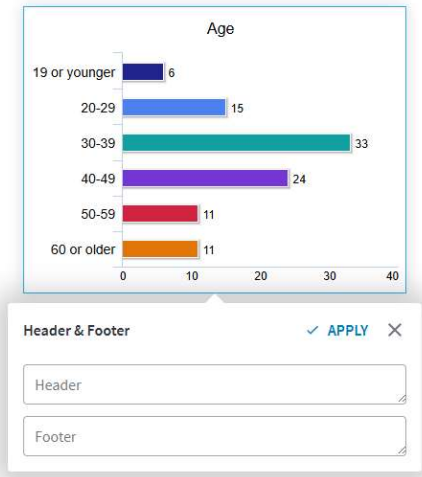


Tags ✓ APPLY ×

Tags



- **Header and Footer** - add structured branding and navigation elements.



- **Slide Management** - working with slides, including importing, resizing, and reordering.

Import slides [X]

Import slides from another report and place them before or after your current slide.

Report:

Place slides:

Before current slide After current slide

CANCEL IMPORT

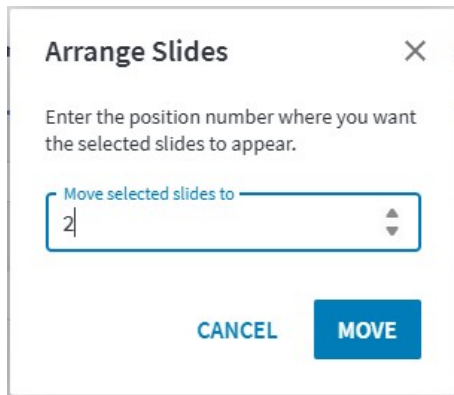
Resize current slide [X]

Set custom width and height for the current slide.

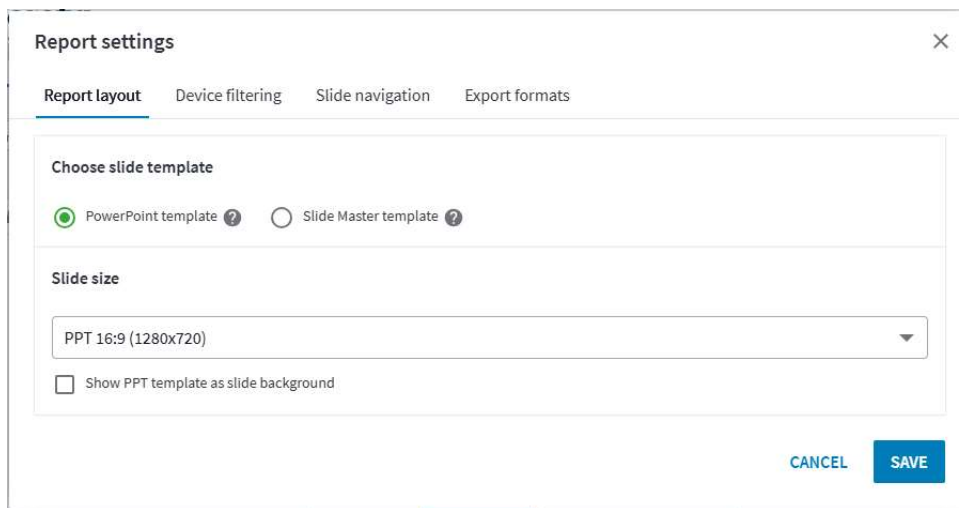
Width:

Height:

CANCEL RESIZE



- **Report Layout Settings** - panel over layout, device filtering, slide navigation and export formats.





2.3 AI Computes – Full version

We're pleased to announce the full version of our AI Computes functionality, now available across all project types. The previous limit of 1,000 respondents has been removed, allowing prompts to be executed for up to 50,000* respondents per activation. For projects exceeding this limit, simply activate the data in your project multiple times. This ensures that all respondents with open-ended answers are included in the analysis.

NOTE! Using AI Computes in larger projects may result in longer processing times. You can monitor progress in the Activation Log, which provides a detailed breakdown of the time taken for each step in the activation process.

We've also introduced enhanced logic to optimize analysis efficiency. When identical combinations of answers, question types, and prompts are submitted, the system will utilize cached results. This reduces processing costs and ensures consistency across analyses.

If you wish to reanalyze all responses, simply modify the prompt slightly. This will trigger a fresh analysis of all relevant data.

* The respondent limit is configurable per installation and may vary.

2.4 Summary object

We've introduced the ability to analyze multiple open-ended questions simultaneously, generating a single, consolidated output. The setup process remains unchanged; however, you can now select multiple questions instead of just one when setting up your summary object.

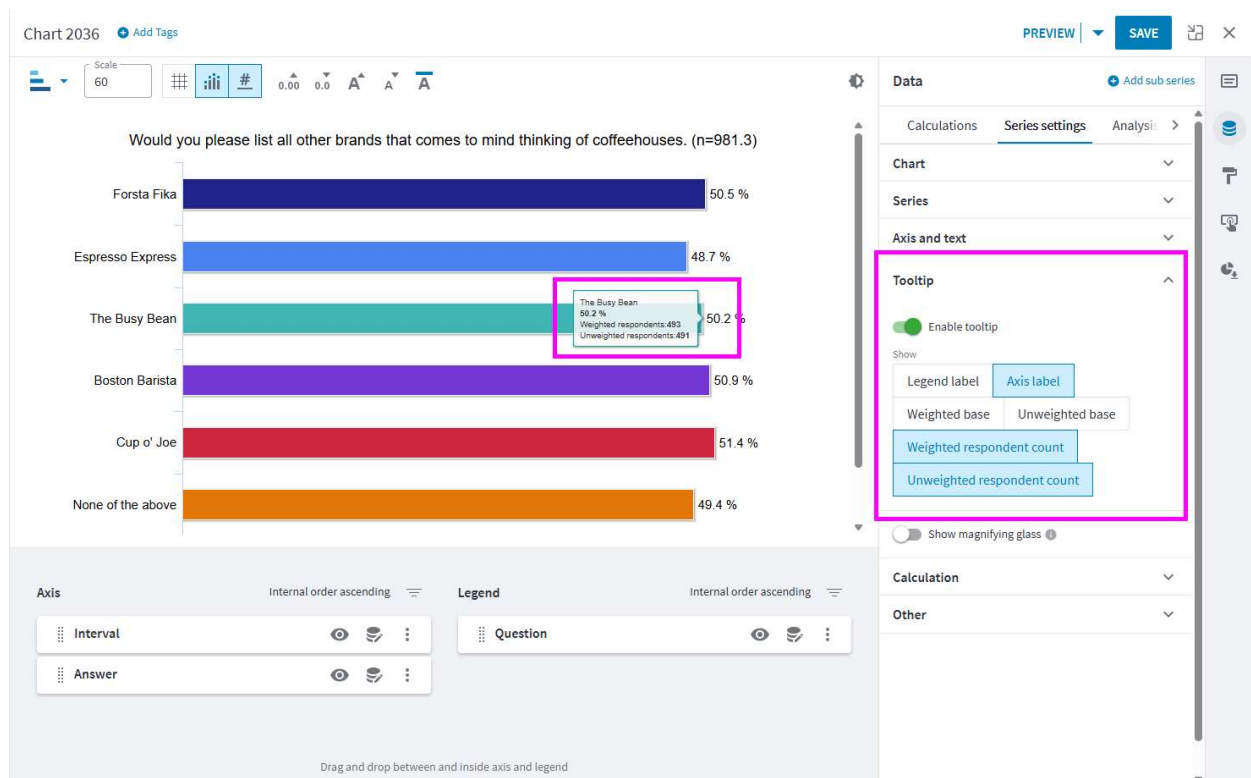
Additionally, we've enhanced the context provided to the AI by including the question text along with the open-ended responses. This ensures the AI has a clearer understanding of the content it's summarizing, resulting in more accurate and relevant insights.



2.5 Chart tooltip – Respondent count

We've added the ability to display either weighted or unweighted respondent counts in chart tooltips. This enhancement provides greater clarity and flexibility when interpreting chart data.

For each bar in the chart, the tooltip will now indicate whether the displayed count reflects weighted or unweighted respondents. These labels are fully customizable and can be translated via the language file, ensuring consistency across localized versions.

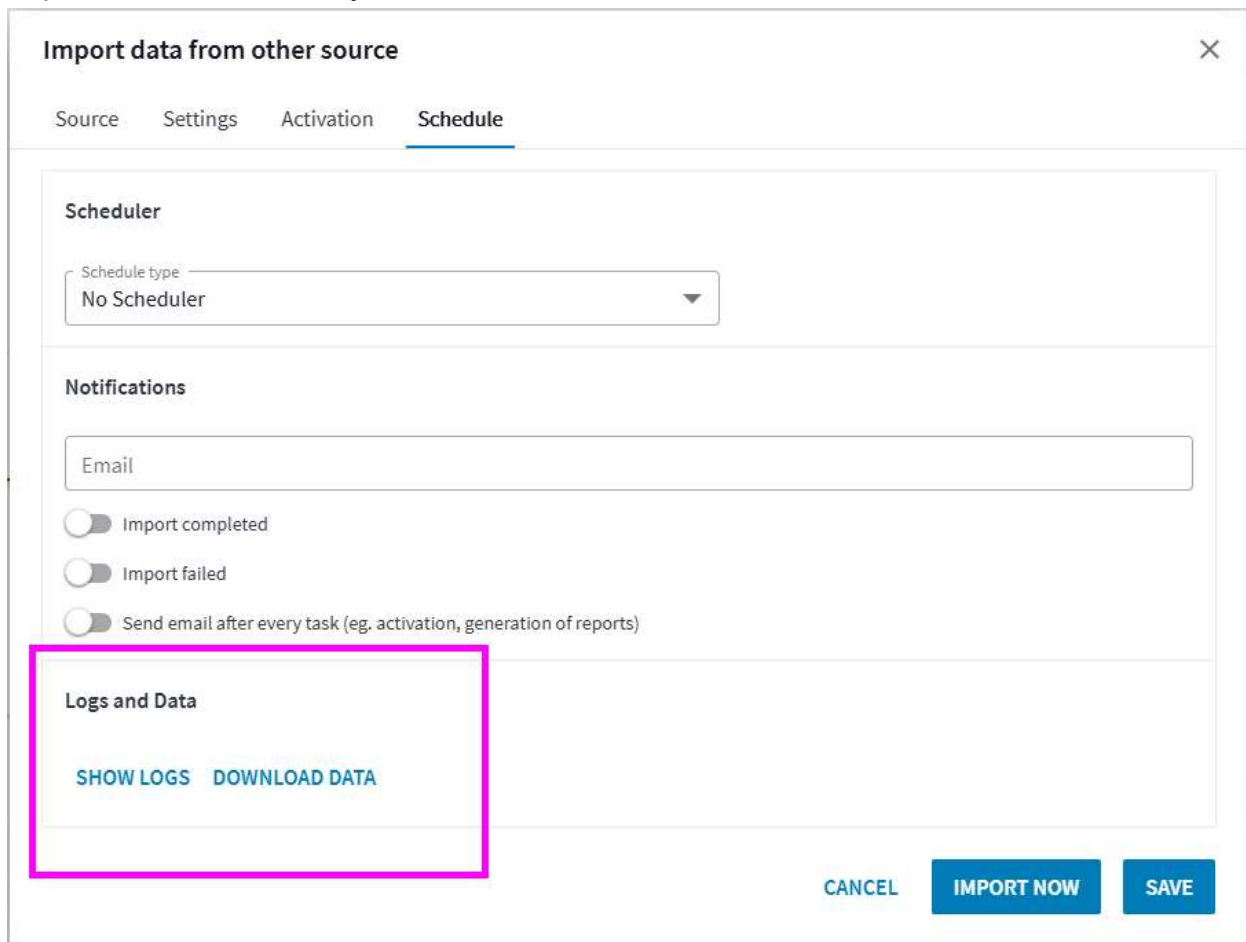


3.Data connectivity

3.1 Download imported file

Previously, the ability to download imported files was limited to scheduled tasks within the legacy UI. We've now extended this functionality to the standard user interface.

As shown in the image below, the download option is now available directly within the task view, alongside the logs. This enhancement simplifies access to imported files and improves overall usability.





4. Project administration

4.1 Color template update

Our Standard color template has been refreshed and modernized to align with current design best practices. This updated template has replaced the previous version and is available for selection during the project creation phase.

If you wish to customize the template and reuse it across other projects, simply export the modified color template from the project where changes were made. This allows you to apply your tailored design consistently across all relevant projects.

For users who prefer to retain the legacy version of the Standard color template, we recommend exporting it from an existing project where it is currently in use. Save it as a custom template to ensure continued access across your organization's projects.

