

Forsta Visualizations October 2025 Release



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1.Introduction

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

Weights and Dates saved in Templates

We have now extended the functionality of StoryTeller data templates to include the saved question codes for Weight and Date variables. Just as with saved questions and filters, the corresponding codes for Weight and Date will now be stored within the template.

When applying a saved template to another project, if the saved question code for Weight or Date does not exist in the target project, the system will automatically use the project's default Weight and Date variables.

NOTE!

At this time, the system mandatory variables “Responsesdate” and “Weight” are not treated as regular questions in the system and therefore are not stored in templates. Any templates that include these variables will apply the default Weight and Date in the target project. In an upcoming release, we plan to extend matching to include these system variables based on their question codes.



Chart labels updates

We have now introduced new styling options for text within chart objects, allowing you to apply **bold**, *italic*, and underline formatting. These options are available in both StoryTeller and StoryCreator, providing greater flexibility when customizing chart presentations.

The screenshot displays a software interface for editing a line chart. The chart area on the left shows five data series: 'Good overall experience' (teal), 'Good service' (purple), 'Cleanliness' (red), 'Value for money' (orange), and 'Good taste' (green). The x-axis represents time from 2023-1 to 2024-4, and the y-axis represents a score from 5.2 to 6.4. The chart editor on the right has three sections: 'Series-axis line', 'Value-axis line', and 'Series-axis information text'. Each section includes controls for line color, text color, font size, text rotation, and text wrap. The 'Series-axis line' and 'Value-axis line' sections also feature a pink-bordered box containing three text formatting icons: **B** (bold), *I* (italic), and U (underline).

Series	2023-1	2023-2	2023-3	2023-4	2024-1	2024-2	2024-3	2024-4
Good overall experience	5.3	5.4	5.4	5.4	5.5	5.5	5.5	5.5
Good service	5.4	5.2	5.6	5.8	6.3	5.7	5.7	5.8
Cleanliness	5.6	5.4	5.4	5.5	5.6	5.5	5.5	5.3
Value for money	5.7	5.2	5.4	6.0	5.1	5.4	5.4	5.6
Good taste	5.9	5.5	5.4	5.4	5.6	5.6	6.0	5.7



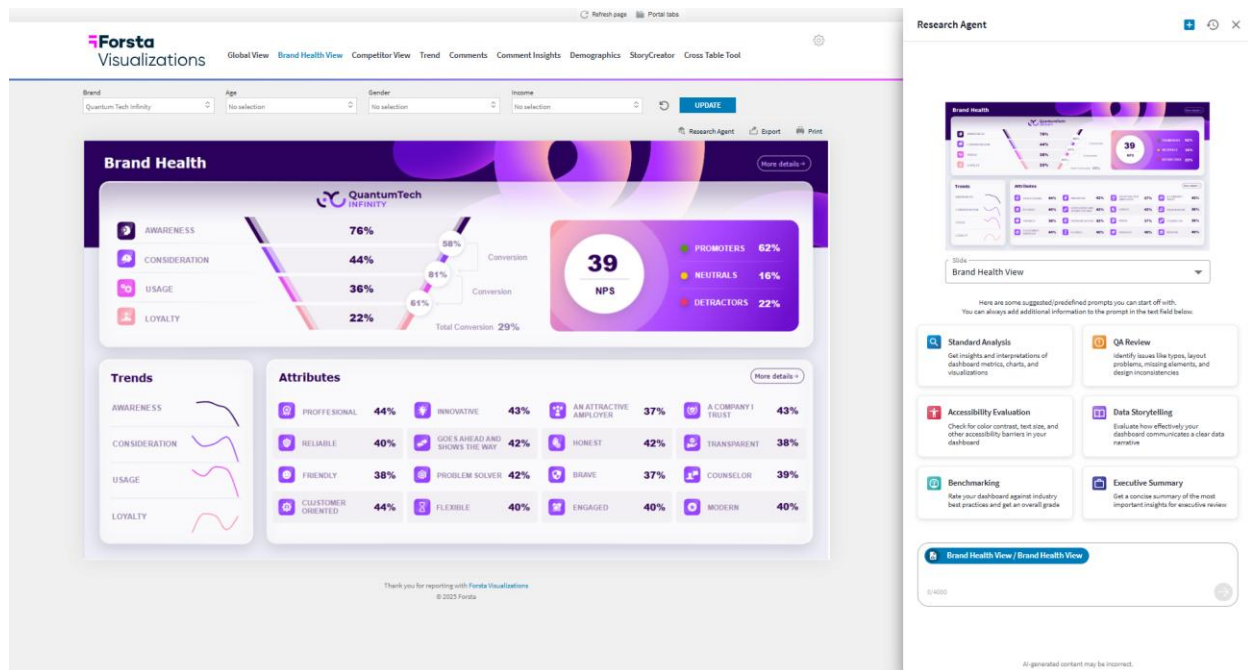
Research Agent – Available now

We're happy to introduce the Research Agent to all admins, 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.

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.

We welcome your suggestions, feedback, and ideas on how this feature can best support you and your report users in the future, please reach out to your Forsta representative.

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.

The screenshot shows a 'Research Agent' window with a brand health dashboard and an 'Analysis Result' section. The dashboard includes a 'Brand Health' overview with a score of 39 and various metrics like Awareness (76%), Consideration (44%), Usage (36%), and Loyalty (22%). The 'Analysis Result' section provides an executive summary with five main points:

- 1. The Big Picture:** Brand awareness is strong, but significant drop-offs in consideration, usage, and loyalty are limiting overall brand health and growth.
- 2. Key Metrics:**
 - Awareness: 76% (high, but trending downward)
 - Consideration: 44% (moderate, declining)
 - Usage: 36% (low, declining)
 - Loyalty: 22% (very low, flat)
 - Net Promoter Score (NPS): 39 (moderate, with 22% detractors)
- 3. Areas of Concern:**
 - Low loyalty (22%) and declining usage indicate poor customer retention and engagement.
 - Consideration rate dropping sharply from awareness, limiting conversion efficiency.
- 4. Opportunities:**
 - High brand awareness (76%) offers a strong foundation to re-engage prospective customers.
 - NPS (39) suggests there is a solid base of promoters (62%) to leverage for referral and advocacy.
- 5. Recommended Actions:**
 - Launch targeted campaigns to improve customer retention and move users up the loyalty ladder.
 - Investigate and address key drivers of attrition between awareness, consideration, and usage stages.
 - Engage promoters with referral and advocacy programs to boost brand usage and loyalty.

At the bottom of the interface, there are navigation buttons: 'BACK', 'PAST ANALYSIS', and 'START NEW ANALYSIS'. A small disclaimer at the very bottom reads: 'AI-generated content may be incorrect.'

How does it work?

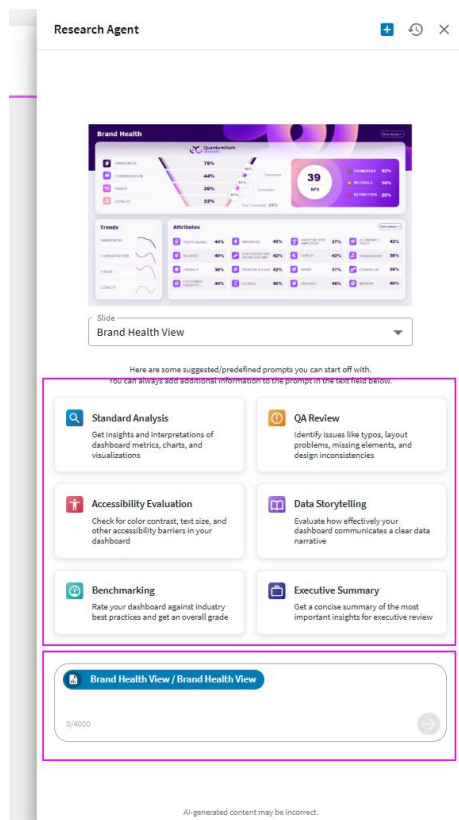
The Research Agent uses visual analysis to offer suggestions for improvement, generate insights, or provide a high-level overview of your slide. It does not connect to your data (meta data or raw data), ensuring that all outputs are based solely on the values and content you've created in your report.



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.

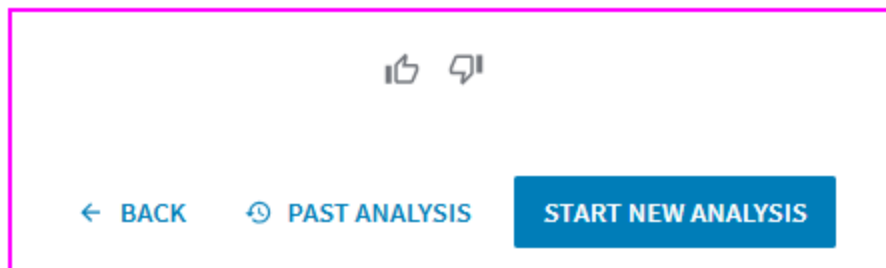
You can now provide feedback directly within the tool by giving a thumbs up or thumbs down based on your experience with the analysis or the feature itself. All feedback is reviewed regularly to help us improve the functionality and overall user experience.

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.

5. **Recommended Actions:**

- Launch targeted campaigns to improve customer retention and move users up the loyalty ladder.
- Investigate and address key drivers of attrition between awareness, consideration, and usage stages.
- Engage promoters with referral and advocacy programs to boost brand usage and loyalty.



AI-generated content may be incorrect.



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.



What's Coming Next

This is the first version of our Research Agent, and several enhancements are already in progress. Upcoming improvements include, but are not limited to:

- Conversational prompting – allowing you to continue your analysis after receiving an initial output, similar to an ongoing chat.
- Dynamic prompting – helping you craft prompts automatically based on the content of the slide you are viewing, ensuring more relevant and precise insights.
- Multi-slide analysis – enabling selection of multiple slides or a vertical slide view for a more comprehensive analysis across slides.
- User access – refining access rights, admin-managed prompt libraries, and availability settings per StoryTeller to support report users.



User Interface update for Respondent Table

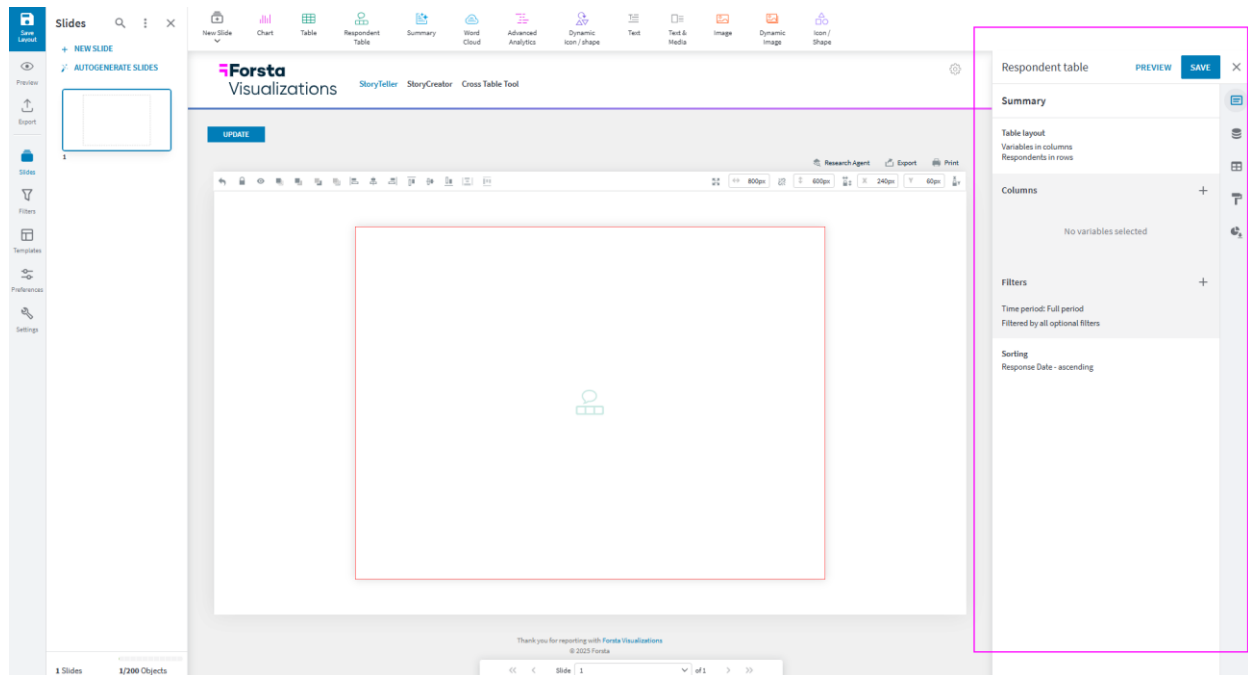
As part of our continued enhancements to the StoryTeller interface, we have now updated the setup experience for the Respondent Table. This update aligns the Respondent Table with the modernized setup pattern already introduced for charts and tables.

The functionality and structure remain the same, except that a full-screen setup mode is not available for this object type, as all configurations can be easily managed within the side panel.

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

How it works

When editing a Respondent Table, the setup panel will open on the right-hand side of the screen, displaying all configuration options in a clear and structured layout.





Updating the preview will now refresh the object directly within your slide, allowing you to instantly see the applied changes.

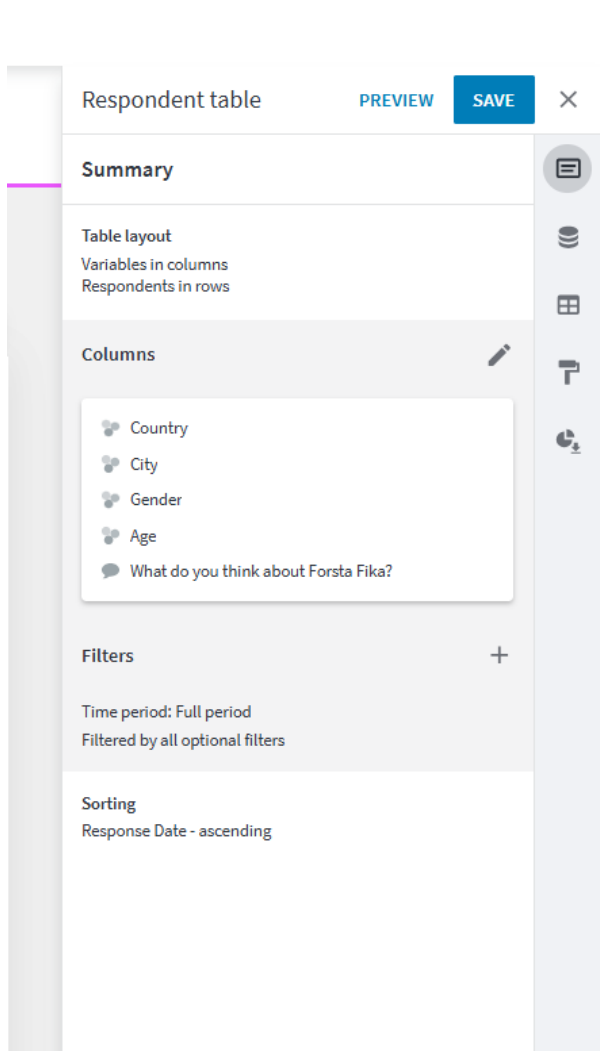
The screenshot shows the Forsta StoryTeller interface. On the left, a table titled "Respondent table" is displayed, containing columns for Country, City, Gender, Age, and a text response to the question "What do you think about Forsta Fika?". The table has 10 rows of data. On the right, a "Format" panel is open, showing options for Templates, General, Background (with color pickers for odd and even rows), Text (with font, color, size, and alignment settings), and Border (with dropdowns for first row and first column). A blue border is visible around the table in the main view, and the "SAVE" button in the format panel is highlighted with a red box.

Country	City	Gender	Age	What do you think about Forsta Fika?
Canada	Toronto	Male	60 or older	I enjoyed the steaks immensely; however, the coffeehouse experience was disappointing. Exceptional service and cleanliness made the visit worthwhile, but there's room for improvement in value.
Australia	Sidney	Female	40-49	I enjoyed the well-cooked meals and excellent service, but the value for money was disappointing. Would recommend for the taste but not for budget-conscious diners.
Germany	Berlin	Male	30-39	I enjoyed the desserts immensely, but the service was disappointing. With better service, this place would be a top choice!
Germany	Berlin	Male	20-29	I enjoyed the steaks immensely, but the service could use improvement. Cleanliness was good, and value was decent. Overall, a pleasant experience!
France	Paris	Male	30-39	Although the coffeehouse has excellent taste, the high prices and cleanliness issues overshadowed my experience. Service was average, but I wouldn't recommend it.
UK	London	Female	19 or younger	While the food was good and the value great, the service was lacking and the coffee taste didn't meet my expectations.
UK	London	Female	50-59	While the location is convenient, the service and cleanliness were disappointing. The food taste was decent, but overall, I expected more for my visit.
United States	New York	Female	60 or older	I truly enjoyed my visit, but extending your hours would make it even better. The coffee was delightful, and the atmosphere was inviting!
France	Paris	Female	50-59	The coffeehouse offered a delightful experience with excellent service and cleanliness, though I found the value and recommendation score less appealing.
Canada	Toronto	Male	19 or younger	I really enjoyed my time here! The service and cleanliness stood out, and I'd definitely recommend it to friends for a great coffee experience.

NOTE!
As with other StoryTeller objects, no changes are saved until you click Save and the blue border appears around your object. If you select a different object while in Edit mode, any unsaved changes will be lost.

Summary

Provides an overview of all enabled settings for the object.



The screenshot displays the configuration interface for a 'Respondent table'. At the top, there are 'PREVIEW' and 'SAVE' buttons, along with a close icon. The main content area is divided into several sections:

- Summary:** The active tab, indicated by a purple highlight on the left sidebar.
- Table layout:** Shows 'Variables in columns' and 'Respondents in rows'.
- Columns:** A list of variables including 'Country', 'City', 'Gender', 'Age', and 'What do you think about Forsta Fika?'. A pencil icon is present for editing.
- Filters:** Shows 'Time period: Full period' and 'Filtered by all optional filters'.
- Sorting:** Shows 'Response Date - ascending'.

A vertical toolbar on the right side of the configuration area contains icons for: Summary (active), Table layout, Columns, Filters, and Sorting.

Data

Used to select the questions, filters, and time periods displayed in the table.

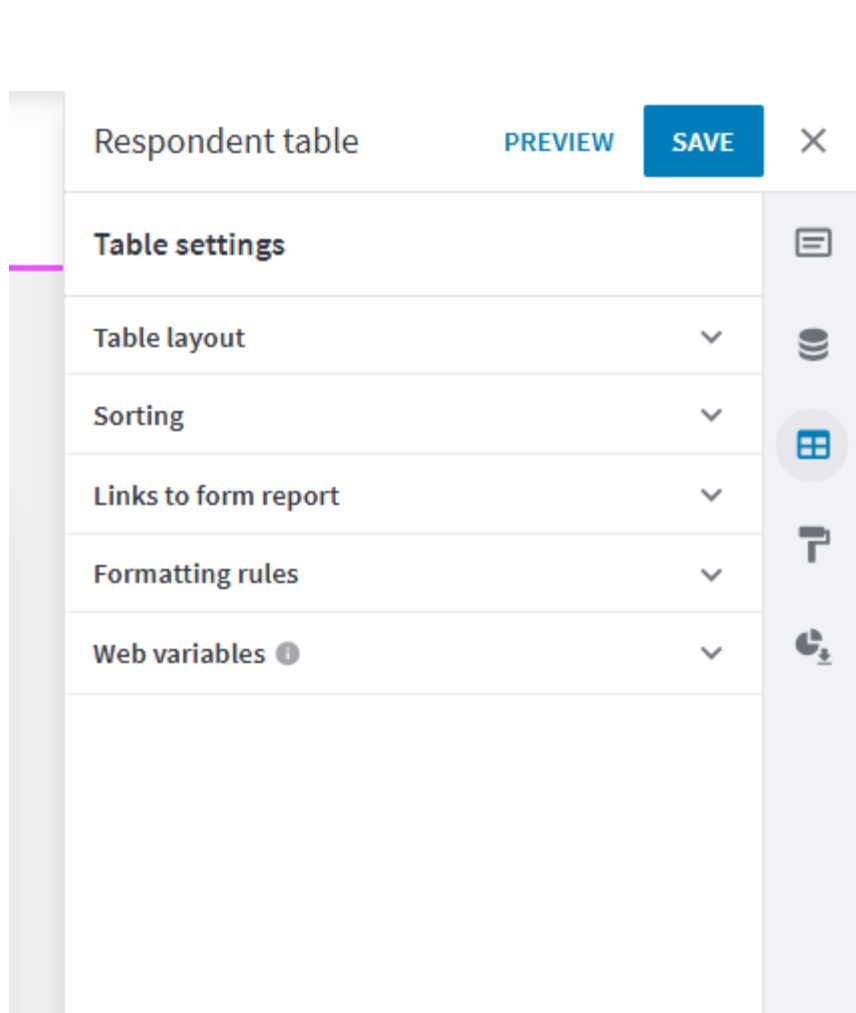
The screenshot shows a configuration window titled "Respondent table" with a "PREVIEW" button and a "SAVE" button. The main area is divided into several sections:

- Data**: A header section with a list icon.
- Columns**: A section with a stack of coins icon and an upward arrow icon. It contains five items, each with a list icon and a dropdown arrow:
 - Country
 - City
 - Gender
 - Age
 - What do you think about Forsta Fika?
- Filters**: A section with a funnel icon.
- Optional filters**: A section with a dropdown arrow.
- Time periods**: A section with a dropdown arrow.

On the left side, there is a "Print" button and a small "px" label with a magnifying glass icon. On the right side, there is a vertical toolbar with icons for a list, a table, a printer, and a refresh/clear icon.

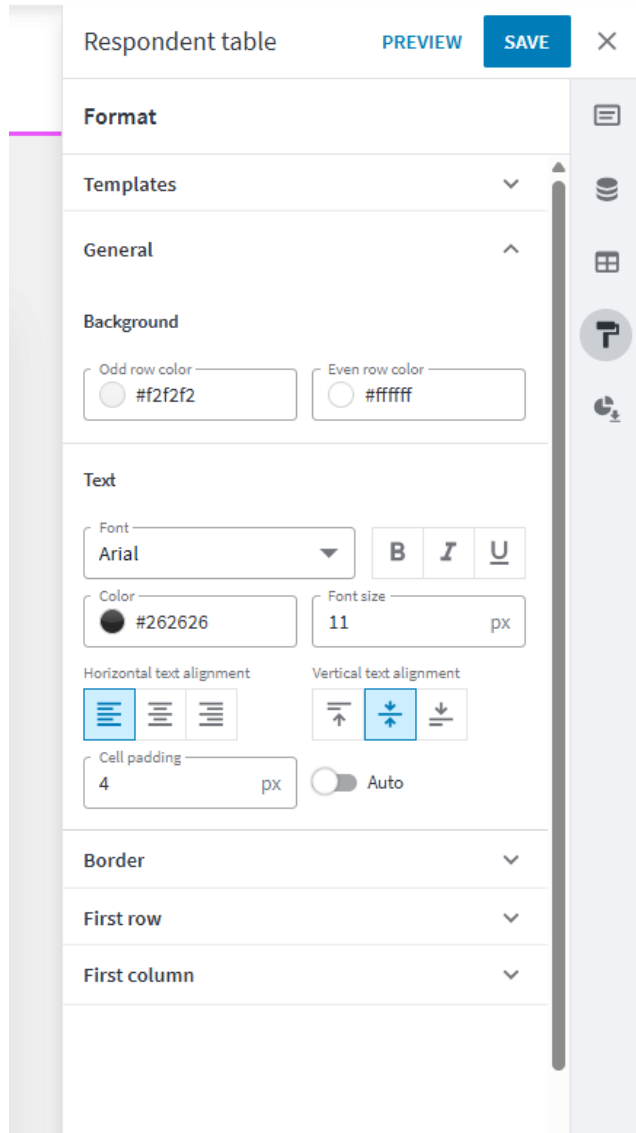
Table settings

Contains configuration options for how the table data is presented.



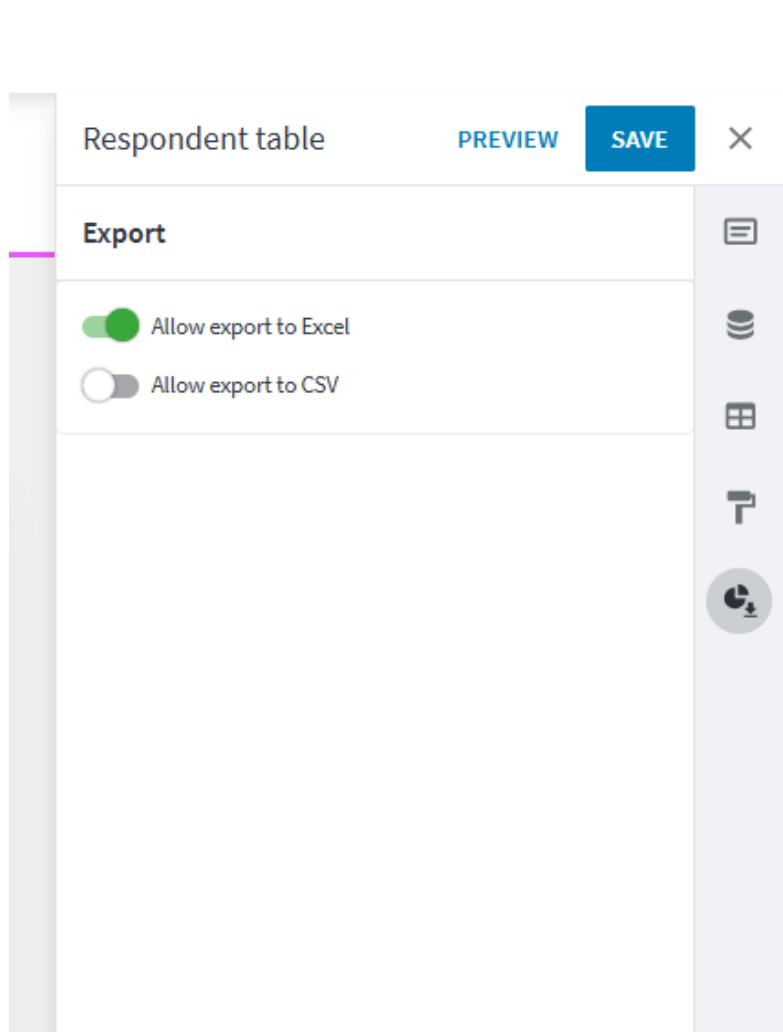
Format

Allows you to style the table layout and appearance.



Export

Includes all export options available for the Respondent Table.



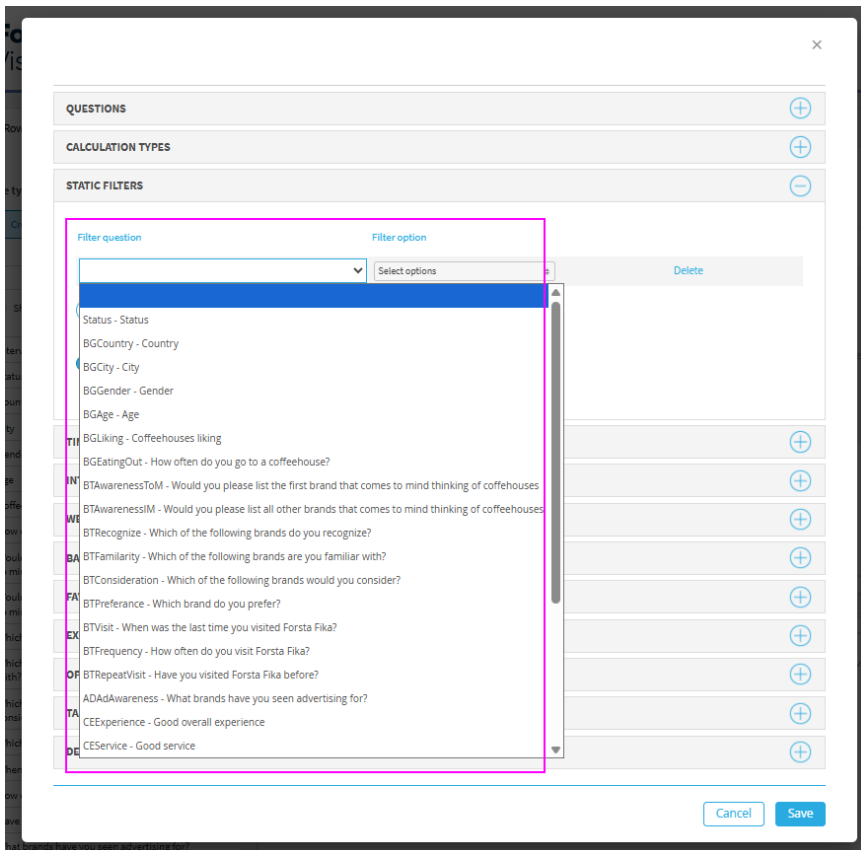
3. CrossTable tool and StoryCreator

Show Question code in Filter setup

When adding static filters to your StoryCreator and CrossTable tool reports, and/or selecting what filters should be available in your StoryCreator, only the question labels were previously displayed. As question labels are not always unique within a project, this could occasionally cause confusion when selecting from multiple similar options.

To improve clarity, the question code is now shown alongside the label in the list of available filters, making it easier to identify and select the correct filter.

Static filter setup in CrossTable tool



Static filter and filter setup in StoryCreator

The screenshot displays the StoryCreator configuration interface. It features several sections: QUESTIONS, CALCULATION TYPES, FILTERS, STATIC FILTERS, TIME PERIOD, INTERVAL, MOVING AVERAGE, OBJECT TYPE, CHART TYPE, SERIES OPTION, WEIGHTING, BASE SIZE LIMITS, DECKS, SLIDE LAYOUT TEMPLATES, and EXPORT FORMAT. The FILTERS section is highlighted with a pink box and contains a list of filters: BGGender - Gender, BGAge - Age, and BGCountry - Country, each with an 'Include' checkbox checked. The STATIC FILTERS section is also highlighted with a pink box and shows a 'Filter question' dropdown menu with the same three filter options. A 'Filter option' dropdown is set to 'Select options', and a 'Delete' button is visible. A note at the bottom of the static filter section states: 'Filter information in the output will not include applied static filters'.



4.Data management

AI Computes – Allow Computes to be selected

We have now enabled Computes to be used as source variables within AI Computes. This enhancement is especially useful when combining results from multiple Computes before running prompts for example, when similar open-ended questions such as “*What additional comments do you have?*” are asked across multiple surveys and you want the AI Compute to process them together.

NOTE!

Computes are executed before AI Computes in the activation process. Therefore, AI Computes cannot be referenced within standard Computes.

AI Computes – Default availability

We have now removed the project-level feature toggle previously required for enabling AI Computes. This functionality is now available by default across all installations and does not require activation by Forsta staff member.

As this is an Admin-level option accessible from the Admin view, it cannot be disabled for individual projects. If AI functionality is not intended for use within a specific project, simply refrain from creating AI Computes.



Respondent Data cleaning

We have introduced a new Respondent Cleaning feature to make it easier to remove respondents from reporting based on predefined rules. The cleaning process is executed during project activation, meaning that all rules, including those using date conditions, are applied at the time of activation, rather than through a scheduled daily process.

How does it work?

Cleaning rules are created using imported questions, allowing you to combine categorical and date variables to define which respondents should be removed. These rules are executed before any variables created within the project are generated, which is why only imported questions can be used in the setup.

Activation Log

↓ Activation ID	▼ Status	▼ Start time
▼ 3	Succeeded	2025-10-17 4:00 PM
Batch IDs: 2,1		
Log	Step	Status
	Preparing data	Succee
	Activating data	Succee
	Execution Of Respondent Cleaning Rules	Succee
	Confirming data	Succee
	Cleaning data	Succee
	Recoding data	Succee
	Calculating new data	Succee
	Processing AI computes	Succee
	Calculating weight	Succee
	Updating Hierarchical Filters	Succee
	Updating InMemory	Succee

Create rule ✕

Name
Respondents Older then 3 months and Status NOT Finished

Description

! Warning: This action is permanent and can't be undone. Removing respondents will delete all associated data. Proceed with caution.

ADD

Question * 📅 Interview_End - Interview_Er	Operator * Older Th...	Amount 3	Time unit Months	🗑️	
Question * 🔗 Status - Status	Operator * Includes ...	Value * Unfinished ✕ Error ✕ Not started ✕ Screend out ✕ Failed ✕ ✕			🗑️

CANCEL **SAVE**

Warning!
Once executed, respondents removed through this process are permanently deleted from the project and cannot be restored.



A full log of deleted respondent IDs is available and can be accessed from both the Activation Log and the Respondent Cleaning page via the LOGS button.

Forsta HX Platform | Visualizations

Switch to old interface

DESIGN REPORTS

LOGS CREATE RULE

Respondent cleaning will only apply to respondents currently included in active data. Respondents existing only in inactive data will not be affected. To make sure only approved data exist in the system, delete inactive data batches.

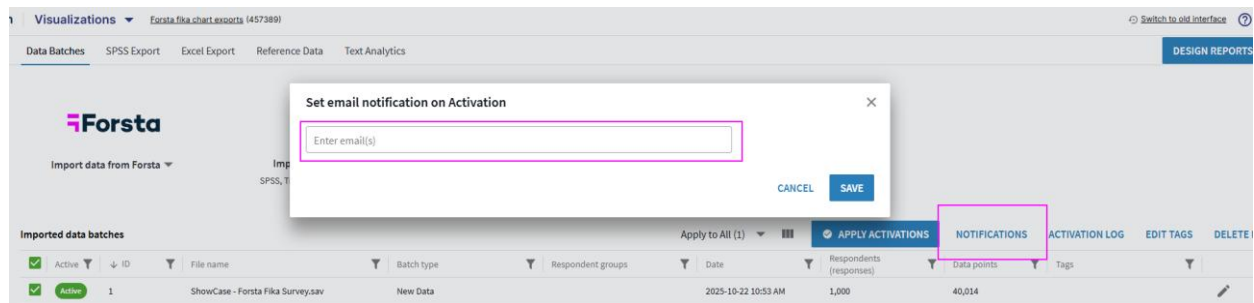
ID	Name	Description
1	Respondents Older then 3 months and Status ...	

5. Project administration

Email notification on failed activation

For larger activations, you can add your email address under the Notification button on the Data page to receive an email once the activation has completed.

We have now extended this functionality so that notifications are also sent for failed activations. In addition, if an activation is interrupted, the activation status will automatically be cleared, and a notification email will be sent to the addresses listed under Notifications.



New date formatting options

Until now, date formats in the system, such as days, weeks, months, have been predefined. We are now introducing the ability for you to create your own custom date formats to use throughout reporting.

The available formatting options are based on .NET's custom date and time format strings.

You can manage and create formats under Project Settings - Layouts and Formats - Date formatting.

All existing predefined formats are listed here, along with a new Custom option at the bottom of the lists.



You can read more about .NET's [custom date and time format string](#) here.

As shown in the example image, you can include static words within your date format. If any of the letters in your static text overlap with formatting characters, simply enclose the word in quotation marks ("").

NOTE!

Static words added to your date formats are not included in translation files and will therefore not be translated.



Below are some examples of commonly used standard date and time formats.

Example date: June 9th, 2025 (Monday, week 24)

Date format	Explanation	Outcome
d	Day of the month, 1-31	9
dd	Double-digit day of the month, 01-31	09
dddd	Full name of the weekday	Monday
ww	Double-digit week number, 01-53	24
www	Double-digit week number with “Week” prefix	Week 24
M	Month number, 1-12	6
MM	Double-digit month number, 01-12	06
MMM	Three-letter month abbreviation	Jun
q	Quarter number, 1-4	2
qq	Quarter number with “Q” prefix	Q2
y	Last two digits of the year, 0-99	25
yyyy	Full year, four digits	2025
hy	Half-year digit	1

You can freely combine these formats to create custom outputs.

Date format	Outcome
dddd www, yyyy	Monday Week 24, 2025
“H”hy 2025	H1 2025
dd MMM-yyyy	09-Jun-25

Your defined custom date formats will be applied throughout the project wherever dates are displayed to report users in charts, tables, or other visual elements.