

Forsta Visualizations January 2026 Release



Forsta Visualizations January 2026 Release	1
1. Introduction	3
2. StoryTeller	4
StoryTeller user interface updates	4
3. Data management	6
Metadata Agent.....	6
Inactivate respondents in Respondent Cleaning	16
4. Project administration	18
Load input variables and respondent table data to InMemory.....	18



1.Introduction

This document describes new and improved features in the Forsta Visualizations January 2026 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

StoryTeller user interface updates

As part of our continued rollout of the improved StoryTeller user interface, we have now updated the Summary and Word Cloud objects. The overall workflow remains familiar and consistent with other updated StoryTeller objects.

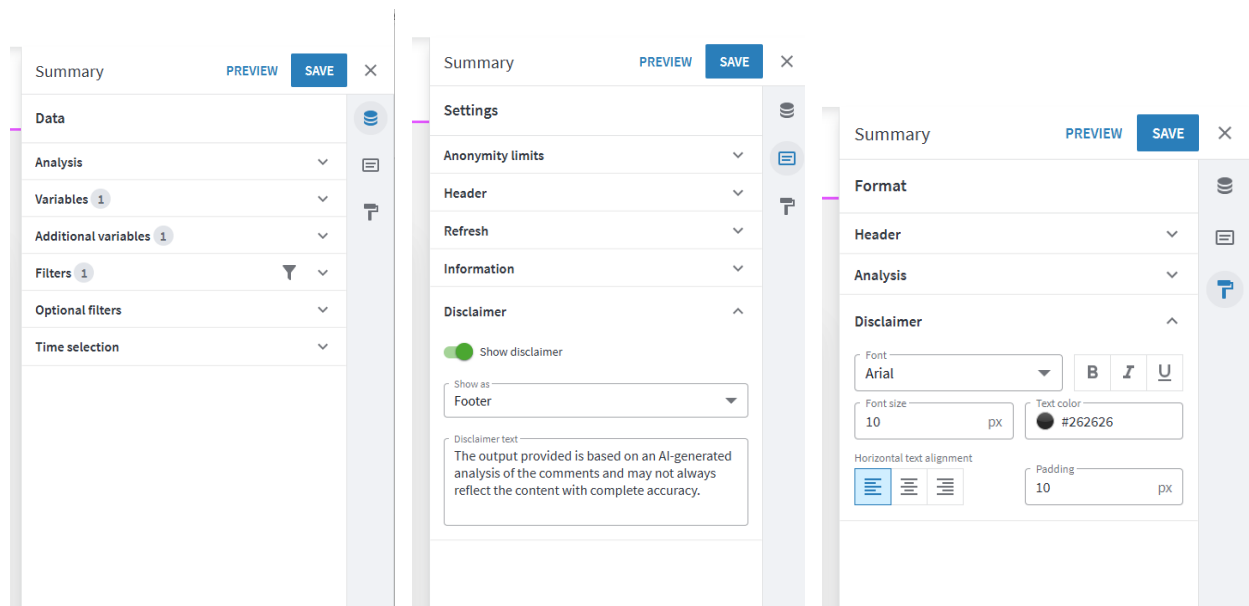
To use the new UI, enable “Use new StoryTeller setup layout” under Project settings -> Beta settings in your project.

When configuring these objects, you start by selecting the data, type of analysis, and questions to include. You then move on to object-specific settings, followed by formatting options to control the look and feel.

As shown below, the setup is organized into three tabs:

- Data - select questions, analysis type, and filters
- Settings/Word cloud settings - configure object-specific behavior and options
- Format - adjust layout, styling, and visual appearance

This update improves clarity and consistency while keeping the setup process intuitive and efficient.





The image displays a user interface for a word cloud tool, divided into three main sections:

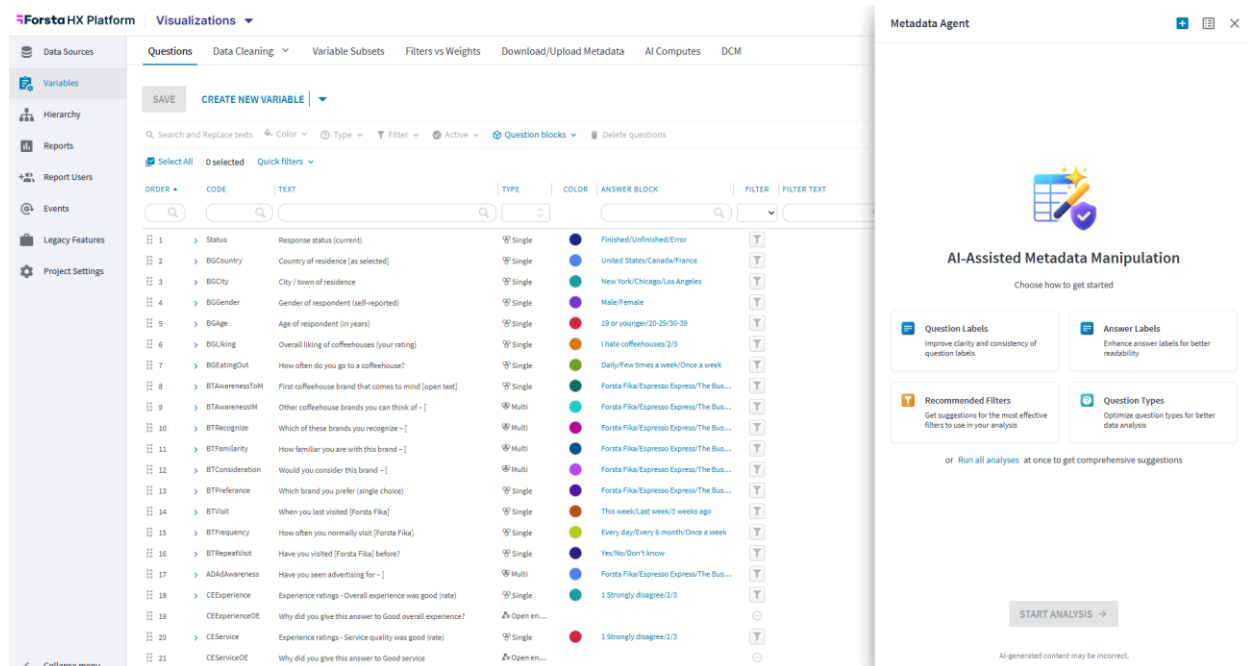
- Data Section (Left):** Features a sidebar with a 'Word cloud' title and 'PREVIEW' and 'SAVE' buttons. Below the title are expandable menu items: 'Data', 'Variables 1', 'Filters', 'Optional filters', and 'Time periods'. A vertical toolbar on the right contains icons for a globe, a cloud, and a printer.
- Word cloud settings Section (Middle):** Also titled 'Word cloud' with 'PREVIEW' and 'SAVE' buttons. It includes a 'Print' icon and a vertical toolbar with a globe, cloud, and printer icon. The settings are organized into sections:
 - Word cloud settings:** A header section.
 - Anonymity limits:** Contains a toggle switch labeled 'Hide result if too few data values'.
 - Word count:** Contains a toggle switch labeled 'Show words count' and two input fields: 'Number of words in the cloud' (value: 50) and 'Min number of characters' (value: 4).
- Format Section (Right):** Titled 'Word cloud' with 'PREVIEW' and 'SAVE' buttons. It includes a 'Print' icon and a vertical toolbar with a globe, cloud, and printer icon. The format options are organized into sections:
 - Format:** A header section.
 - Template:** Displays a grid of color swatches and a 'Print' icon.
 - General:** Contains a 'Background color' input field.
 - Text:** Contains a 'Font' dropdown menu set to 'Arial'.
 - Word size:** Contains two input fields: 'Min word size' (value: 10 px) and 'Max word size' (value: 48 px).
 - Palette:** Contains a 'Custom text color palette' section with a 'Colors' dropdown set to '10'. Below this are four color swatches labeled 'Color 1' through 'Color 4' with hex codes: '#20248a', '#4b82f0', and two partially visible ones.



3.Data management

Metadata Agent

We're happy to introduce the Metadata Agent, a new feature designed to reduce the time spent managing questions and metadata in your project. The Metadata Agent automates tasks previously handled manually on the Question page, making it easier and faster to keep metadata clean and consistent.



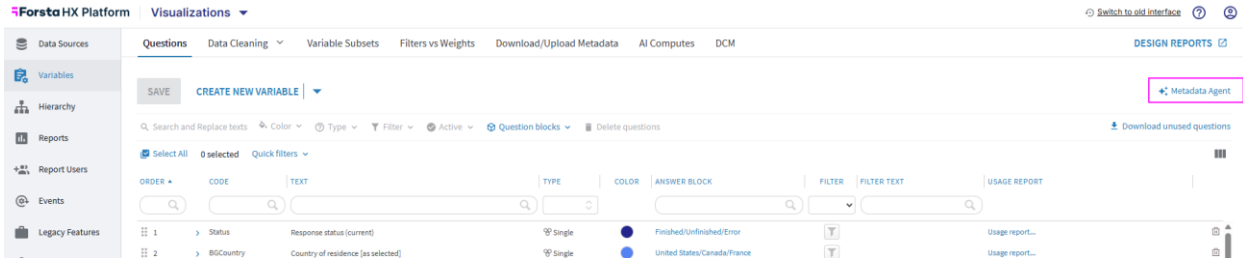
In this first release, the Metadata Agent can help you:

- Improve question and answer labels
- Recommend which questions to use as filters
- Update question types to scale questions where appropriate

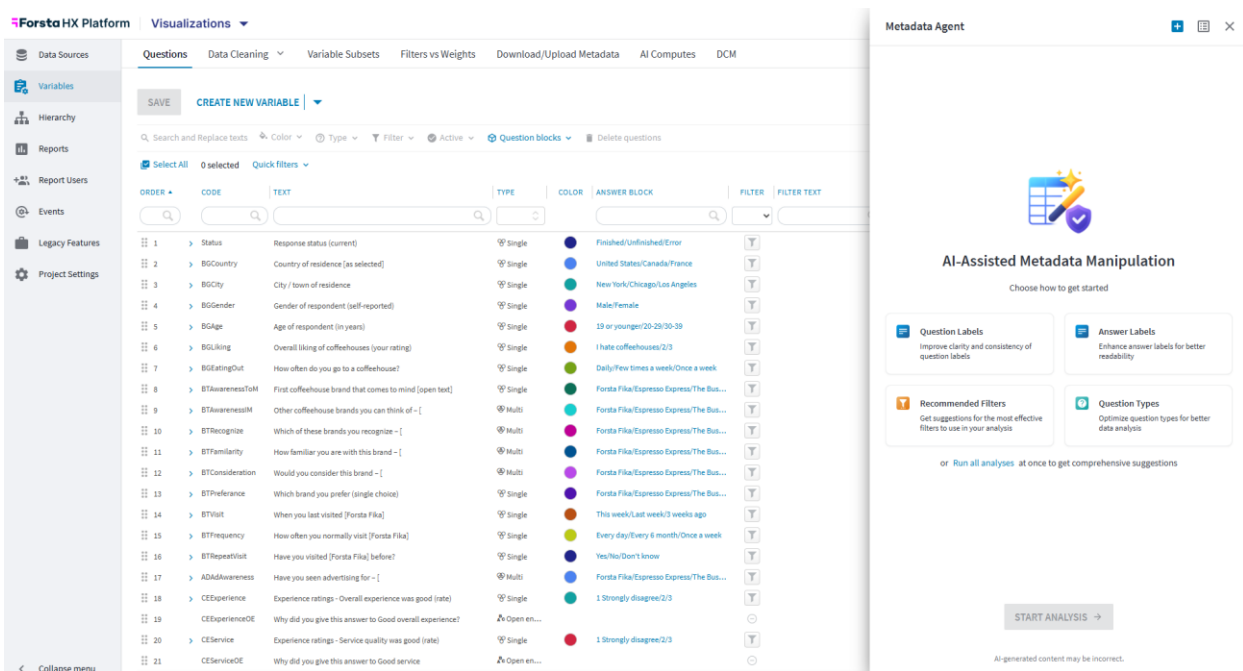
This is the first step toward smarter and more efficient metadata management in Forsta Visualizations.



You can find it in the top right corner of your Question page.



The agent panel is placed on top of the Question page, on the right-hand side.





How does it work?

The Metadata Agent uses the metadata already available in your project to suggest improvements and updates to your questions. It does not connect to raw respondent data. The agent is built around predefined tasks that mirror actions already available on the Question page.

Metadata Agent

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AI-Assisted Metadata Manipulation

Choose how to get started

- Question Labels**
Improve clarity and consistency of question labels
- Answer Labels**
Enhance answer labels for better readability
- Recommended Filters**
Get suggestions for the most effective filters to use in your analysis
- Question Types**
Optimize question types for better data analysis

or [Run all analyses](#) at once to get comprehensive suggestions

START ANALYSIS →


AI-generated content may be incorrect.



To get started, select one or more of the available tasks in the right-hand panel. Start the analysis, and the AI will process your project metadata and return a list of suggested changes based on the selected tasks.

In the upper right corner, you can start a completely new analysis by clicking on the + sign.

Metadata Agent + ☰ ×



AI-Assisted Metadata Manipulation

Choose how to get started

Question Labels
Improve clarity and consistency of question labels

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Enhance answer labels for better readability

Recommended Filters
Get suggestions for the most effective filters to use in your analysis

Question Types
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START ANALYSIS →

AI-generated content may be incorrect.



Once the analysis is complete, you can:

- Approve all suggested changes, or
- Select only the changes you want to apply

For each suggested change, you can hover over the (i) to see why this was suggested.

The screenshot shows the 'Metadata Agent' interface with several sections:

- Question Labels (35)**: A list of labels including 'Answer Labels (2)', 'Every 6 month', 'Every 6 months', 'Don't know', and 'Don't know'.
- Recommended Filters (3)**: A list of filters including 'BGCountry | Country of residence (as selected)', 'Country', 'BGGender | Gender of respondent (self-reported)', and 'Gender'. A confirmation dialog is open over this section with options: 'Undo accepted', 'Accept all', and 'Dismiss all'.
- Question Types (19)**: A list of question types including 'BGAge | Age of respondent (in years)' and 'Age Group'. A tooltip for 'Age Group' says 'Age is a core demographic segment.'

At the bottom, a message states: 'You have applied AI suggestions to the Metadata. These changes are not yet saved.' Below this message are two buttons: 'CLOSE & SAVE LATER' and 'SAVE NOW'. A small disclaimer at the very bottom reads: 'AI-generated content may be incorrect.'



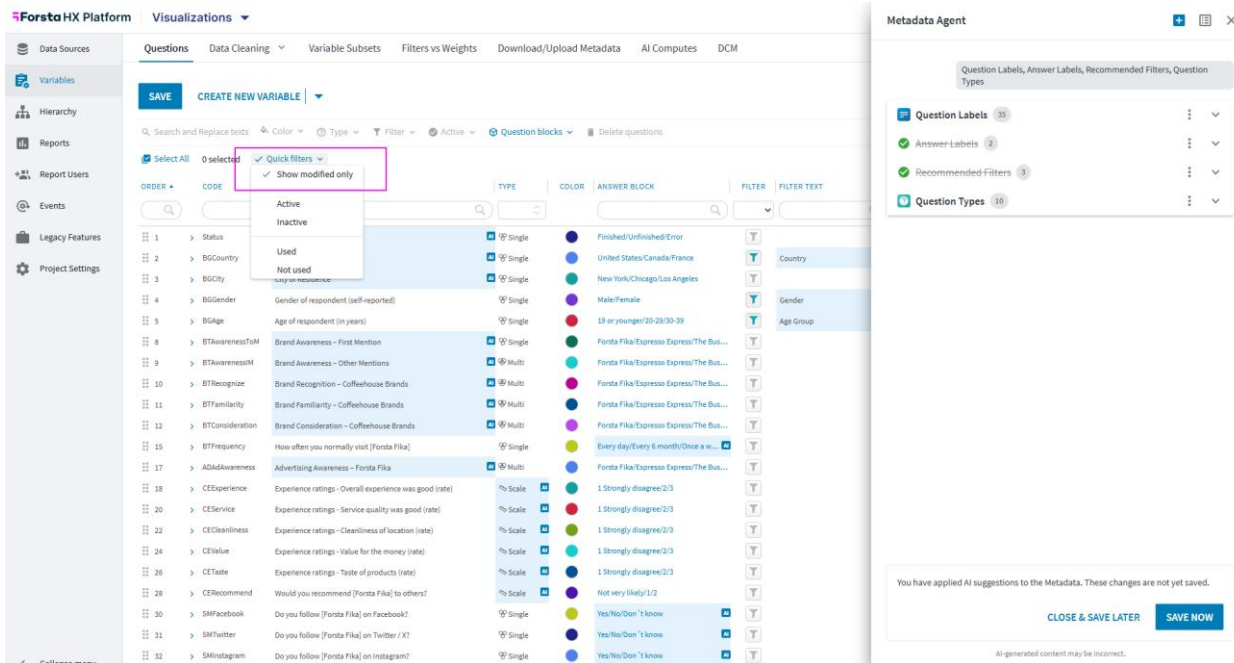
Approved changes are immediately highlighted on the Question page, making it easy to review what has been updated.

The screenshot displays the Forsta HX Platform interface. The main window shows a list of questions with columns for ORDER, CODE, TEXT, TYPE, COLOR, ANSWER BLOCK, FILTER, and FILTER TEXT. The questions are numbered 1 through 21. The Metadata Agent panel on the right shows a list of question types: Question Labels (35), Answer Labels (2), Recommended Filters (3), and Question Types (10). A notification at the bottom of the Metadata Agent panel states: "You have applied AI suggestions to the Metadata. These changes are not yet saved." with buttons for "CLOSE & SAVE LATER" and "SAVE NOW".



You can use the quick filters at the top of the Question page to view:

- All questions with unsaved metadata changes suggested by the Metadata Agent
- Any manual changes that have not yet been saved



All suggested changes remain fully editable. You can also manually adjust any question or label, even if it was updated based on an AI recommendation.

When you click “Save now” in Metadata Agent or “Save” on the Question page, all changes are saved, regardless of whether they were suggested by the Metadata Agent or edited manually.

Logging and transparency

The Metadata Agent includes a log that shows which changes were implemented based on AI suggestions.

The screenshot shows a web interface for the 'Metadata Agent'. At the top, the title 'Metadata Agent' is displayed on the left, and on the right, there are three icons: a blue plus sign, a purple square containing a white document icon with a grid, and a grey 'X' icon. The main content area features a central icon of a calendar, a pencil, and a shield with a checkmark. Below this icon is the heading 'AI-Assisted Metadata Manipulation' and the text 'Choose how to get started'. Two rounded rectangular buttons are shown at the bottom. The left button is titled 'Question Labels' and has the subtext 'Improve clarity and consistency of question labels'. The right button is titled 'Answer Labels' and has the subtext 'Enhance answer labels for better readability'.



The log lists all changes approved through the Metadata Agent. If you manually edit a label that was also suggested by the AI, your manual version will be applied. In this case, the change will not appear in the log as an AI-suggested update.

The screenshot displays two side-by-side panels. The left panel, titled 'Logs', contains a table with columns for Time, User, Analyses, Suggestions, and Status. It shows a log entry from 1 minute ago for 'Question Labels' and a more detailed entry from 22 minutes ago for 'Question Labels, Answer Labels, Recommended Filters, Question Types'. Under the 22 minutes ago entry, there is a sub-section for 'Recommended Filters (3)' with a table:

Filter ID	Question ID	Question	Filter Text
1	2	Country of Residence	Country
2	4	Gender	Gender
3	5	Age of Respondent	Age Group

A tooltip 'Core demographics for segmentation.' is visible over the 'Age Group' filter text. Below the filters are sections for 'Answer Labels (2)', 'Question Labels (9)', and 'Question Types (6)'. The right panel, titled 'Metadata Agent', features an 'AI-Assisted Metadata Manipulation' section with a 'START ANALYSIS' button and a disclaimer: 'AI-generated content may be incorrect.'

This ensures full transparency while still giving you complete control over your project metadata.



Data Security

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

Your metadata (inputs) and AI-generated suggestions (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.
- 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.



Inactivate respondents in Respondent Cleaning

In addition to the existing functionality that allows you to create rules based on imported questions to permanently remove respondents during activation, we have now introduced the option to inactivate respondents.

When respondents are inactivated, they remain in the project but are excluded from all reporting. This option is useful when testing performance in large projects or evaluating the impact of cleaning rules without permanently removing data.

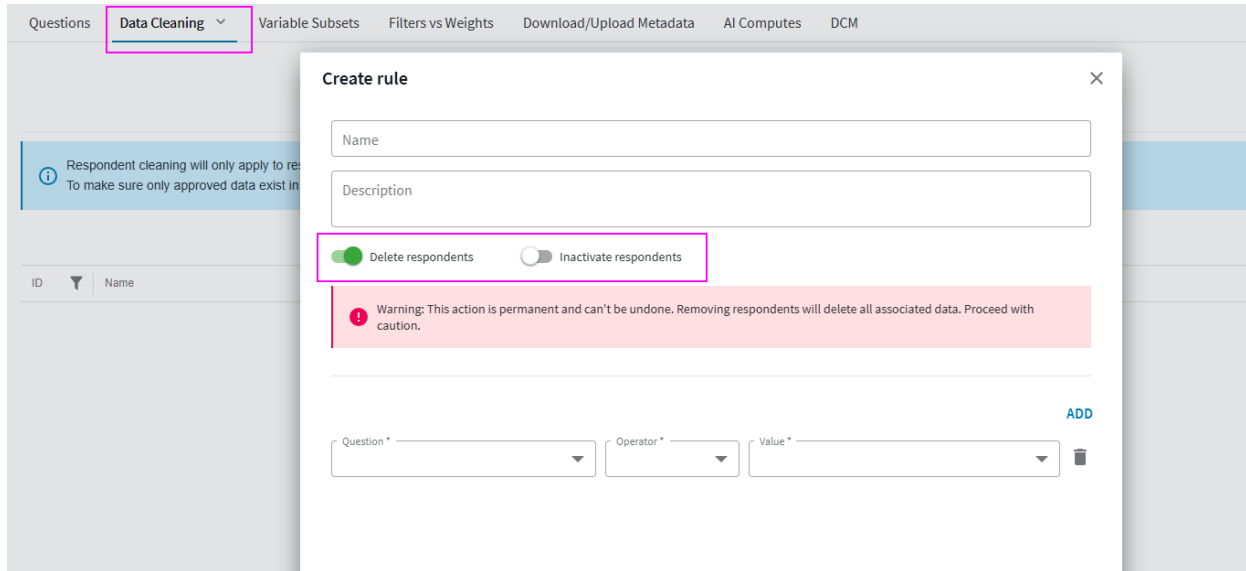
NOTE!

Inactivation is intended as a temporary measure and should not be used long term. If respondent data is no longer needed, we recommend permanently deleting it from the project rather than keeping it in an inactivated state.

How does it work?

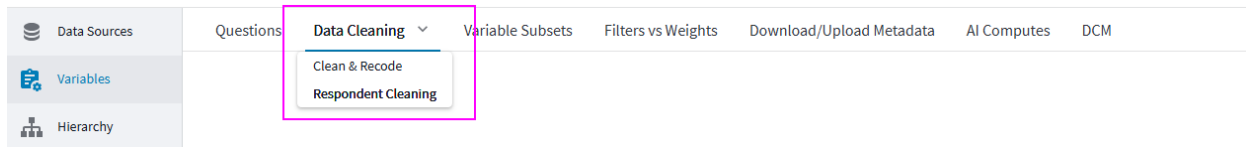
When creating cleaning rules, you now have two options: Delete respondents or Inactivate respondents. Apart from this selection, the setup and execution of the rules work in the same way as before.

The cleaning log will clearly indicate whether a rule resulted in respondents being deleted or inactivated.



NOTE!

We have moved and merged the two previously separate cleaning options into a single tab, making it easier to manage all respondent cleaning rules in one place.





4. Project administration

Load input variables and respondent table data to InMemory

To improve performance in larger projects where input variables and respondent tables are used extensively, we have moved an existing feature into general availability, allowing you to manage it directly without assistance from Forsta staff. Previously, this option was available only to Forsta staff.

You can now choose to include input data and respondent table data in your InMemory model. This means that:

- Input variables used in any object
- Questions selected for display in respondent tables, including open-ended questions

can now be loaded into InMemory.

As the size of this data can vary significantly, open-ended questions are often much larger than categorical questions, enabling this option may increase the time required to update your InMemory model. However, once loaded, objects that use input data and respondent tables will benefit from faster generation and improved performance.

The screenshot shows the 'Project Settings' interface. On the left is a navigation menu with 'Project Settings' selected. The main content area is titled 'Project Settings' and has a 'Performance' sub-section. Under 'Performance', there is a sub-section for 'In-memory and caching'. A 'Save' button is visible at the top right of this section. The 'IN-MEMORY AND CACHING' section contains the following settings:

- Activate in-memory data model**
Calculations, such as result generation are performed faster.
- Status: Updated
- Update in-memory data model automatically after changes in case and metadata
- Load input variables and respondent table data to InMemory**

Below this section are two other options:

- Use cached metadata**
The meta data, such as optional filters and hierarchical filters, loads faster when navigating between reports if data is cached.
- Activate cached storage of report settings**
The report objects, such as charts and tables, loads faster if they are cached.