

# StoryTeller User Interface



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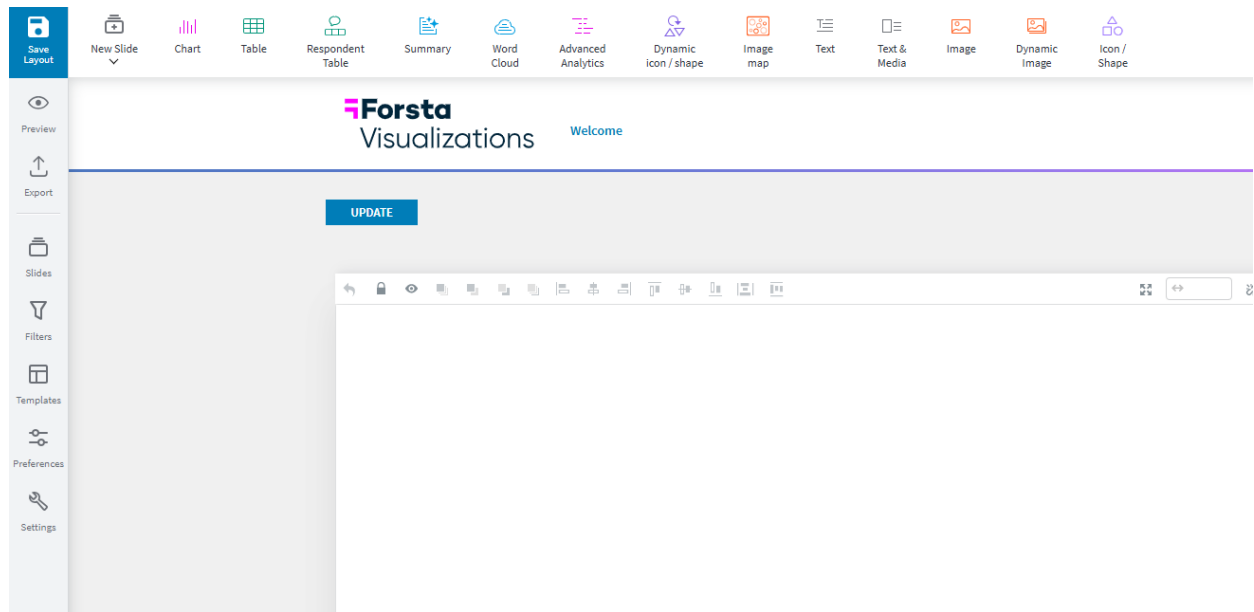
# StoryTeller

This document provides an overview of the new StoryTeller User Interface. If you have any questions or concerns, please contact Support or your Forsta representative.

## Overall working ribbon

The UI follows the same design principles as Forsta Visualizations project pages, with the main navigation placed on the left-hand side.

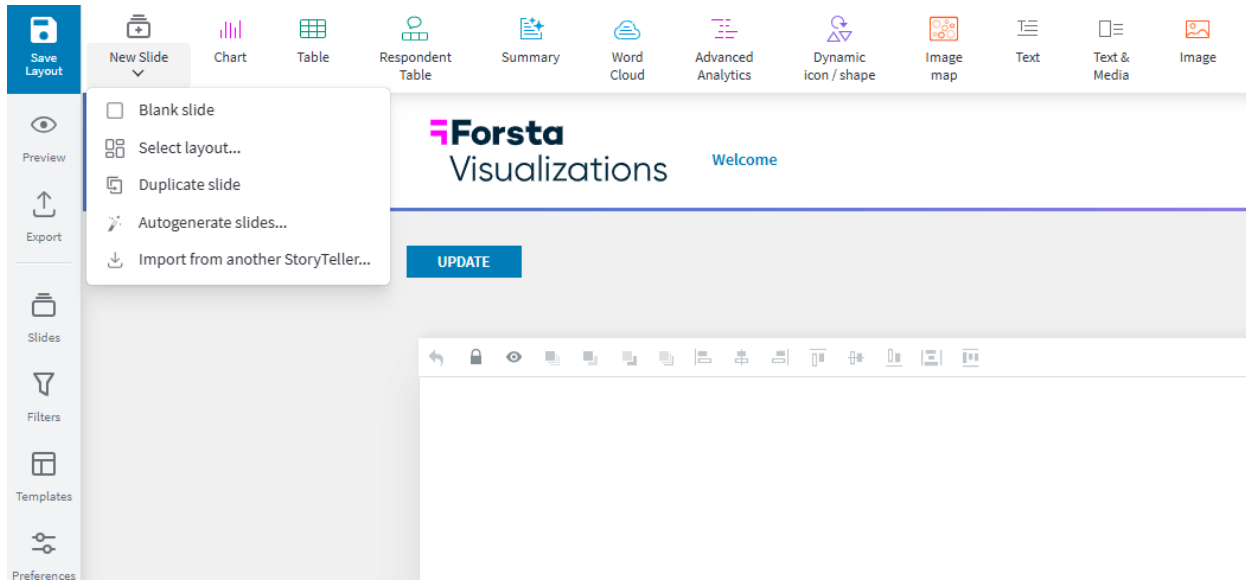
To create a new object, simply click on the object type at the top of the screen. The object icons have also been refreshed with an updated look.





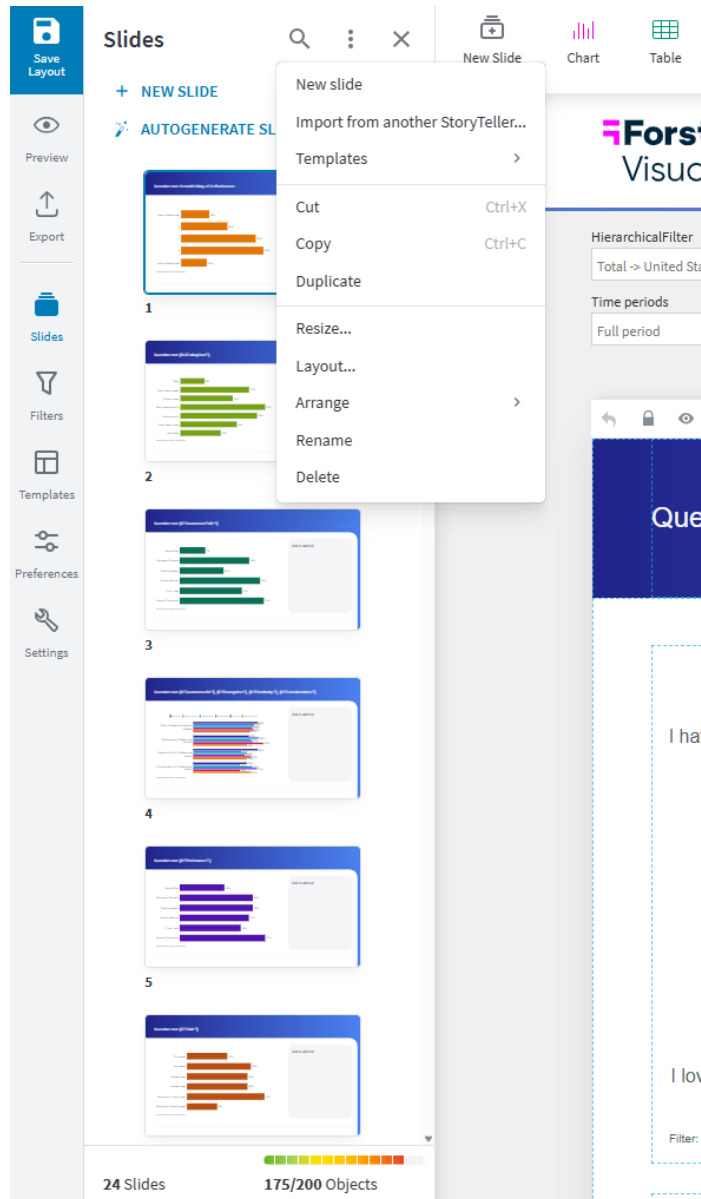
### Top menu

All object types available for insertion onto a slide are located in the top menu.



### Slides

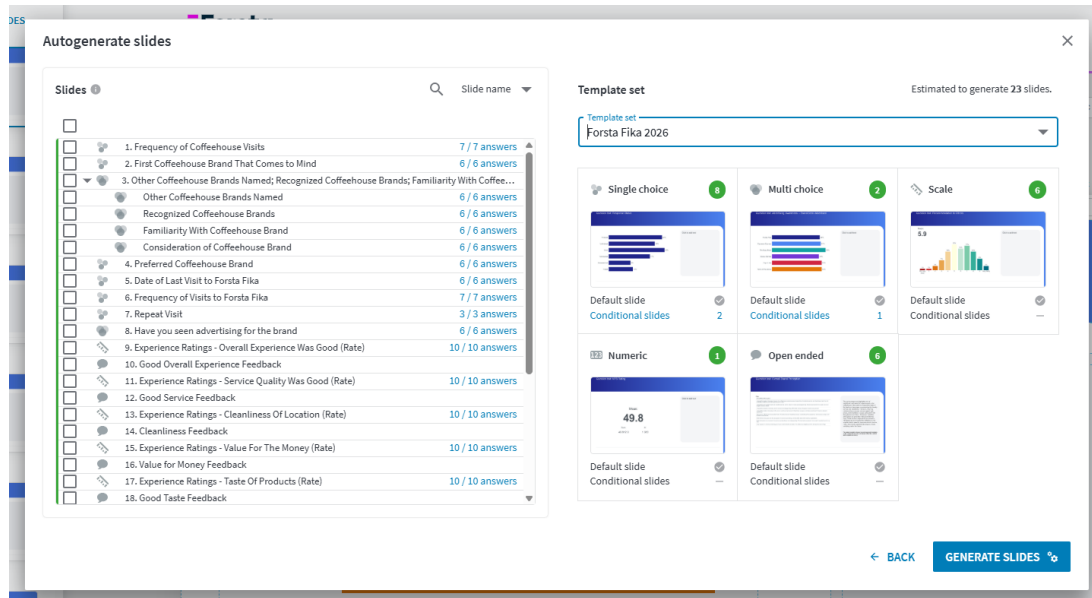
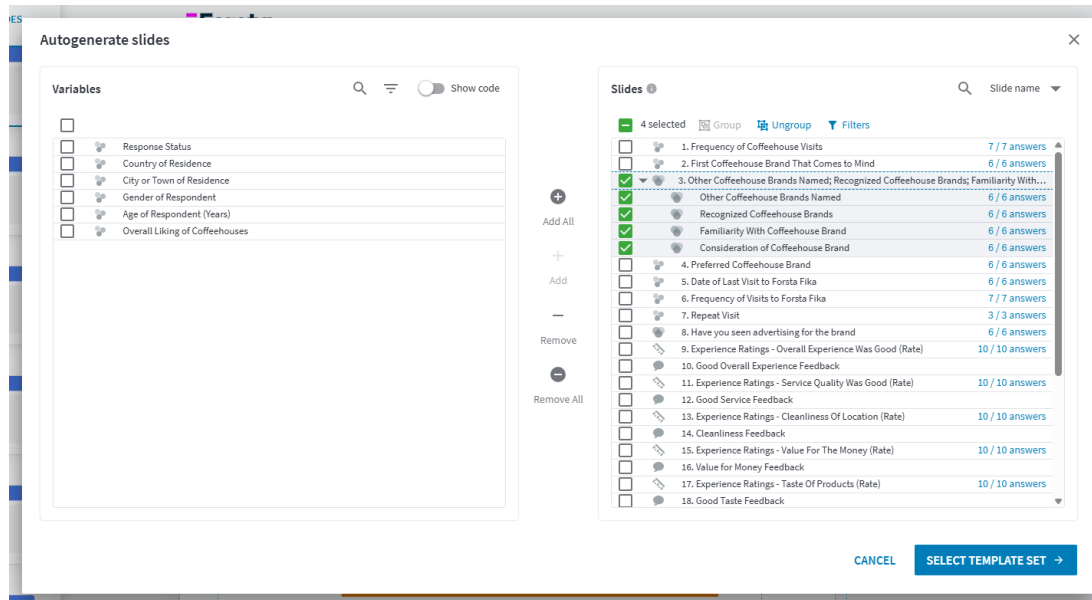
The slide menu is available under Slides. At the bottom, you can see the total number of slides and objects. At the top, you can search for slide names. By clicking the three dots, you can add, delete, duplicate or rearrange slides.





### Autogenerate Slides

The setup for Autogenerate Slides is now divided into two steps. In the first step, you select your questions, group them, and apply filters to define your slides. Once completed, you move to the second step, where you can further fine-tune the groupings and select the template set that will be used to generate the slides.



### Report Filters

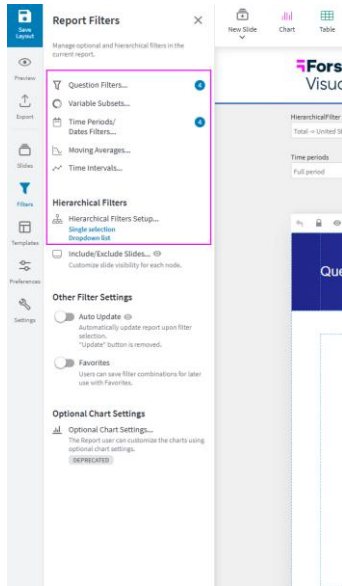
All report filter settings for the report are gathered here. It is now clearly indicated when filters are in use, without needing to open the filter setup page.

The screenshot displays the 'Report Filters' interface. On the left is a sidebar with navigation options: Save Layout, Preview, Export, Slides, Filters (highlighted), Templates, Preferences, and Settings. The main panel is titled 'Report Filters' and contains the following sections:

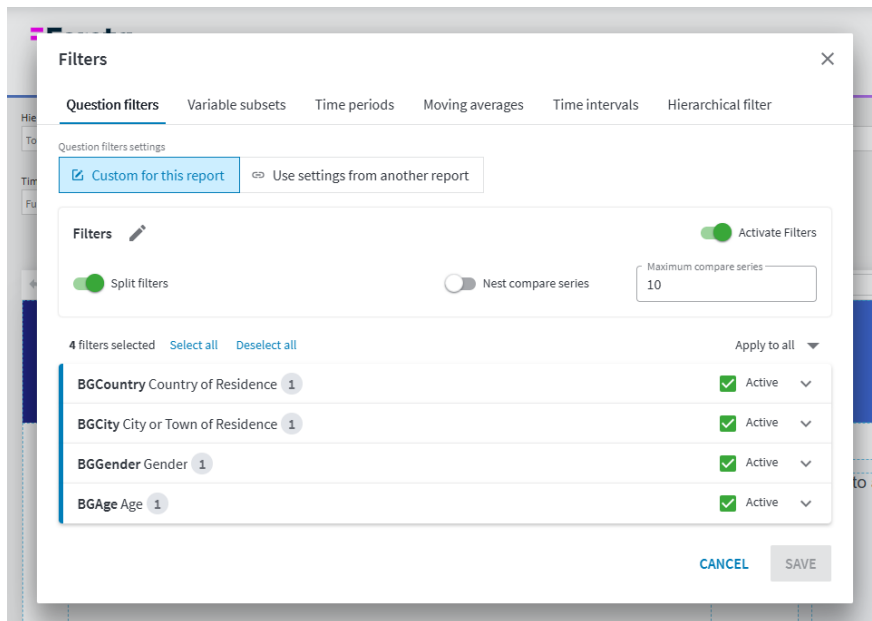
- Question Filters...** (4 filters in use)
- Variable Subsets...**
- Time Periods/ Dates Filters...** (4 filters in use)
- Moving Averages...**
- Time Intervals...**
- Hierarchical Filters**
  - Hierarchical Filters Setup...** (Single selection, Dropdown list)
  - Include/Exclude Slides...** (Customize slide visibility for each node)
- Other Filter Settings**
  - Auto Update** (toggle on): Automatically update report upon filter selection. "Update" button is removed.
  - Favorites** (toggle off): Users can save filter combinations for later use with Favorites.
- Optional Chart Settings**
  - Optional Chart Settings...** (DEPRECATED): The Report user can customize the charts using optional chart settings.

The right side of the screenshot shows a preview of a report slide titled 'Forsta Visuc'. It features a 'Hierarchical Filter' set to 'Total -> United Sta' and 'Time periods' set to 'Full period'. A blue box labeled 'Que' is visible at the bottom of the slide preview.

Clicking on any of the filter links within Report Filters opens the unified filter panel.



As seen, all options for report filters are now gathered in the same panel.





### Question filters

Here you can configure how question filters behave in your report - activate or deactivate them, choose single or multi-select, define default selections, set selection limits, and control options such as compare series, dynamic filtering and export visibility.



### Variable subsets

Here you can define and activate variable subsets for the report, choose single or multi-select behavior, set selection limits, and decide which subsets should be available and selected by default for users.

The screenshot shows the 'Filters' dialog box with the 'Variable subsets' tab selected. The 'Variable subsets settings' section includes a toggle for 'Custom for this report' (checked) and 'Use settings from another report'. Below this, there is a 'Variable subset' label with an edit icon, and a 'Multi-select' option is selected. A 'Min' and 'Max' input field is present. A toggle switch for 'Activate Variable subsets' is turned on. A table lists variable subsets with their activation status and a 'Default' checkbox.

Variable subset	Active	Default
All brands	✓	✓
Forsta Fika	✓	<input type="checkbox"/>
Espresso Express	✓	<input type="checkbox"/>
The Busy Bean	✓	<input type="checkbox"/>
Boston Barista	✓	<input type="checkbox"/>
Cup o' Joe	✓	<input type="checkbox"/>
None of the above	✓	<input type="checkbox"/>



### Time period

Here you can activate and configure time period filtering for your report, choose which time selections should be available, define the default option, and control which date variable should be used for filtering.

The screenshot shows the 'Filters' dialog box with the 'Time periods' tab selected. At the top, there are tabs for 'Question filters', 'Variable subsets', 'Time periods', 'Moving averages', 'Time intervals', and 'Hierarchical filter'. Below these, there are two buttons: 'Custom for this report' (highlighted) and 'Use settings from another report'. The main section is titled 'Time periods settings' and contains a toggle for 'Time periods' (activated) and a dropdown for 'Dynamic filtering' (set to 'Off'). Below this is a list of time period options with checkboxes and radio buttons for selection. The 'Full period' option is selected with a radio button. The 'Date variable' section is also visible, with 'Response Date' selected as the default.

Time periods	Checked	Default
Time periods	<input checked="" type="checkbox"/>	Default
Full period	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Day selection	<input type="checkbox"/>	<input type="radio"/>
Week selection	<input type="checkbox"/>	<input type="radio"/>
Month selection	<input type="checkbox"/>	<input type="radio"/>
Quarter selection	<input checked="" type="checkbox"/>	<input type="radio"/>
Year selection	<input type="checkbox"/>	<input type="radio"/>
Select last X periods...	<input type="checkbox"/>	
Year-to-Date	<input type="checkbox"/>	<input type="radio"/>
Calendar control...	<input checked="" type="checkbox"/>	<input type="radio"/>
Static date range...	<input type="checkbox"/>	<input type="radio"/>
Date variable	Checked	Default
Date variables	<input checked="" type="checkbox"/>	Default
Response Date	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Interview date	<input checked="" type="checkbox"/>	<input type="radio"/>



### Moving average

Here you can activate moving averages for the report, choose which intervals should be available to users, and define the default moving average period to control how trends are smoothed in time-based charts.

The screenshot shows a 'Filters' dialog box with the 'Moving averages' tab selected. At the top, there are tabs for 'Question filters', 'Variable subsets', 'Time periods', 'Moving averages', 'Time intervals', and 'Hierarchical filter'. Below the tabs, there are two buttons: 'Custom for this report' (highlighted in blue) and 'Use settings from another report'. A section titled 'Moving Average' has a toggle switch labeled 'Activate Moving average' which is turned on. Below this is a table with columns for 'Moving average', a checkbox, and a radio button. The 'Default' radio button is selected. The table lists intervals 1 through 14. Intervals 1, 4, and 12 have their checkboxes checked. Interval 12 also has its radio button selected.

Moving average	<input type="checkbox"/>	Default
1	<input checked="" type="checkbox"/>	<input type="radio"/>
2	<input type="checkbox"/>	<input type="radio"/>
3	<input type="checkbox"/>	<input type="radio"/>
4	<input checked="" type="checkbox"/>	<input type="radio"/>
5	<input type="checkbox"/>	<input type="radio"/>
6	<input type="checkbox"/>	<input type="radio"/>
7	<input type="checkbox"/>	<input type="radio"/>
8	<input type="checkbox"/>	<input type="radio"/>
9	<input type="checkbox"/>	<input type="radio"/>
10	<input type="checkbox"/>	<input type="radio"/>
11	<input type="checkbox"/>	<input type="radio"/>
12	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
13	<input type="checkbox"/>	<input type="radio"/>
14	<input type="checkbox"/>	<input type="radio"/>

CANCEL SAVE



Time intervals

Here you can activate and control which time intervals are available in the report - such as day, month, quarter or year - define the default interval, and optionally enable automatic interval selection based on the user's chosen time period.

**Filters**
✕

Question filters
Variable subsets
Time periods
Moving averages
Time intervals
Hierarchical filter

Time intervals settings

Custom for this report
⇌ Use settings from another report

Interval 
 Activate Intervals

Auto-select interval based on user selected Time period ?

Time interval	-	Default
Day(s)	<input type="checkbox"/>	<input type="radio"/>
Week(s)	<input type="checkbox"/>	<input type="radio"/>
Month(s)	<input checked="" type="checkbox"/>	<input type="radio"/>
Quarter(s)	<input checked="" type="checkbox"/>	<input type="radio"/>
Half year	<input type="checkbox"/>	<input type="radio"/>
Year(s)	<input type="checkbox"/>	<input type="radio"/>
Full period	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>

CANCEL
SAVE



### Hierarchical filter

Here you can activate and configure the hierarchical filter, choose how it should be displayed - for example as a dropdown - set single or multi-select behavior, and control which levels or nodes should be available in the report.

**Filters** [Close]

Question filters Variable subsets Time periods Moving averages Time intervals **Hierarchical filter**

Hierarchical filter settings

Custom for this report  Use settings from another report

**HierarchicalFilter** [Edit]  Activate Hierarchical filter

Layout

Dropdown list [v]  Single-select  Multi-select

Dynamic filtering

Off [v]

**Nodes**

Select nodes to show in the report

All nodes **Selected levels** Selected nodes Selected nodes + sub nodes

Level 1

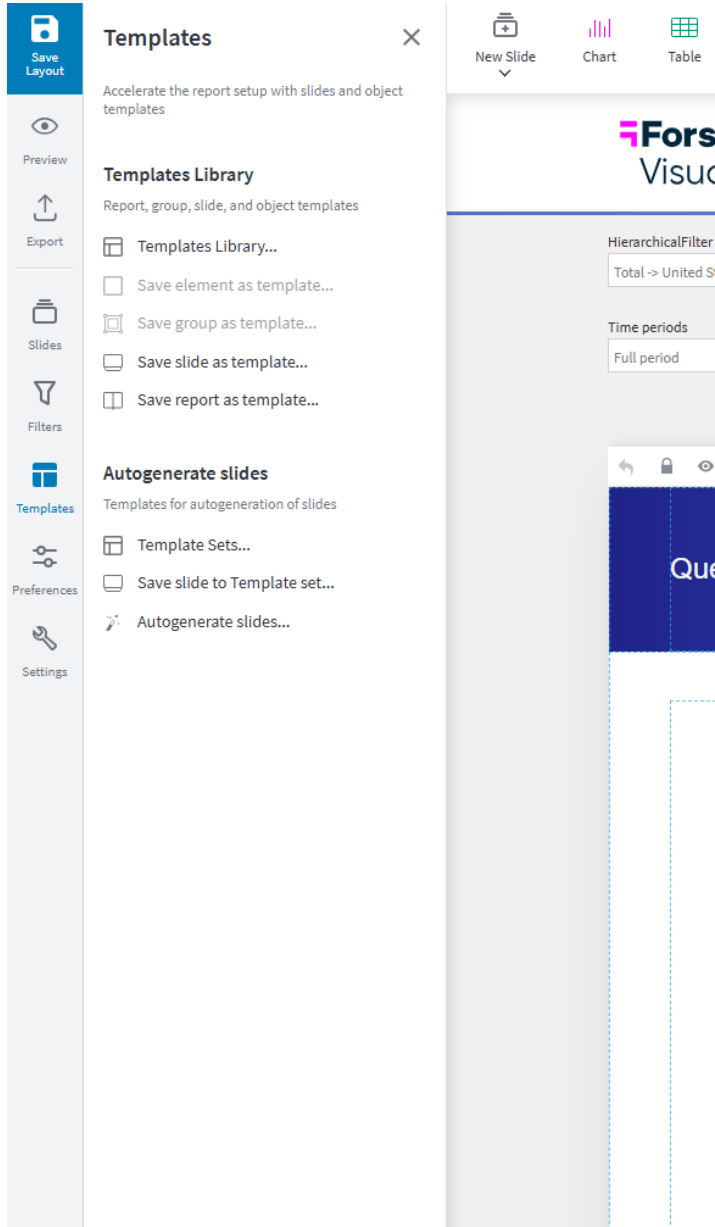
Level 2

Level 3

CANCEL SAVE

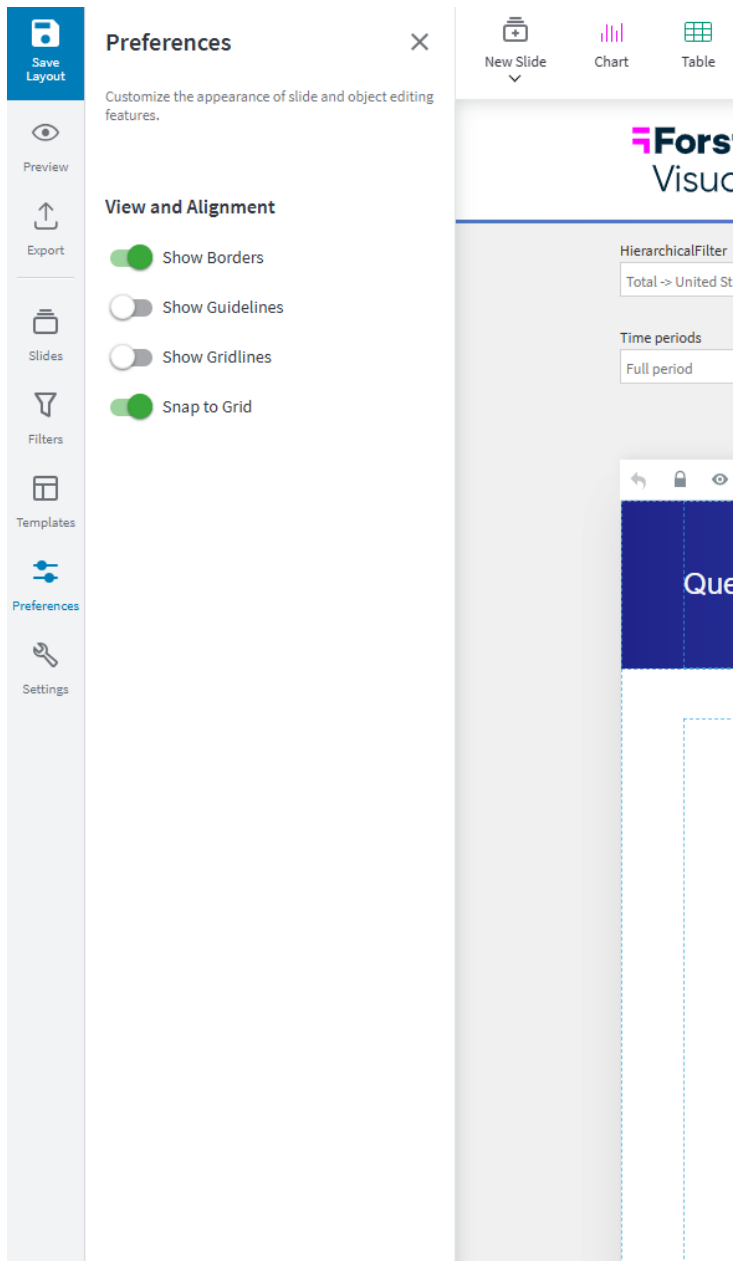
## Templates

All templates are located here, including Layout templates and Template sets used in Autogenerate slides.



## Preferences

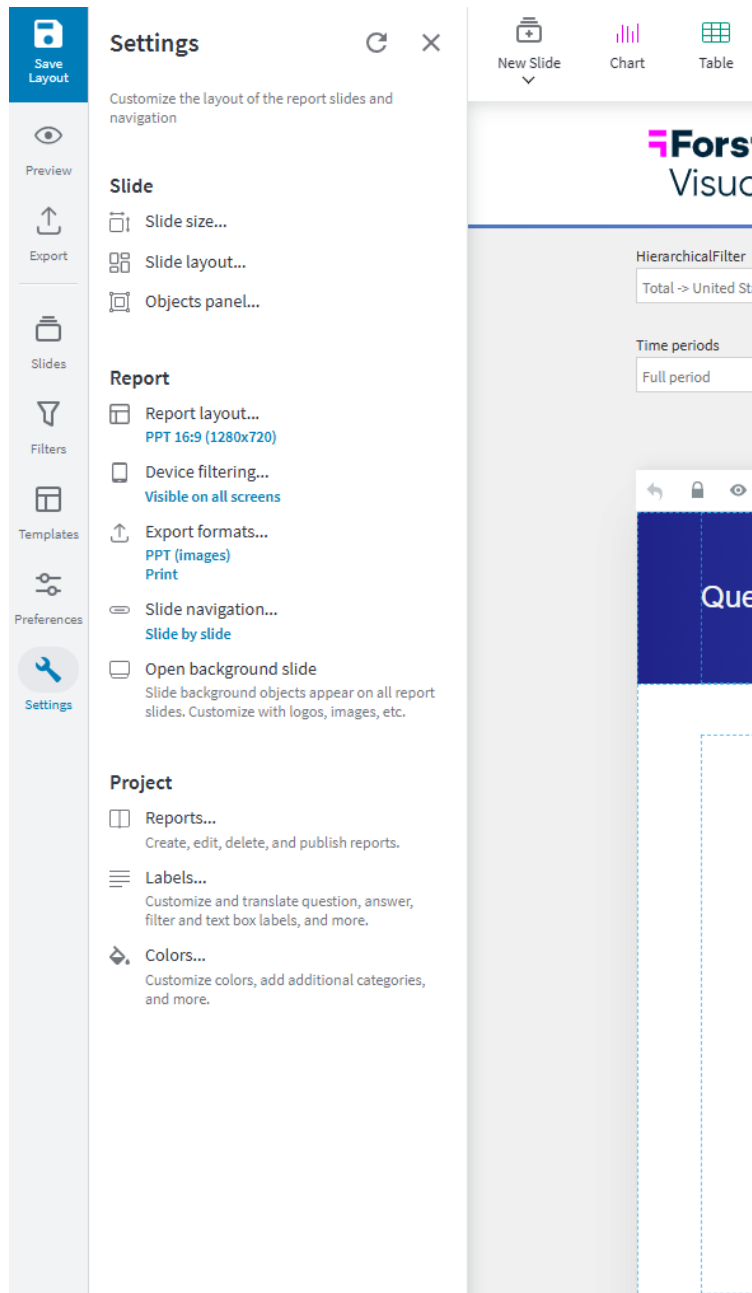
Options related to slide and object appearance can be found here.





### Settings

All report-level settings are available here, including Slide size, Enabled export options and Labels and colors.



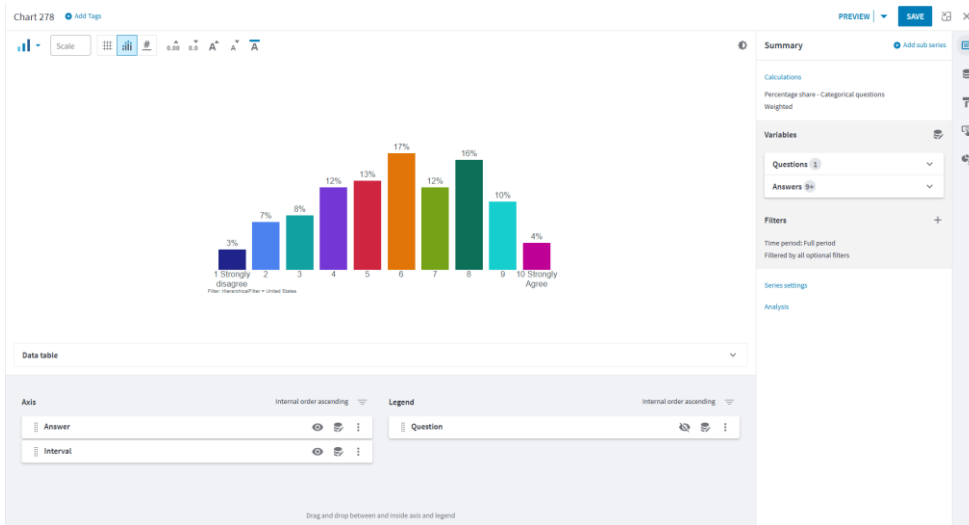


## Object setup

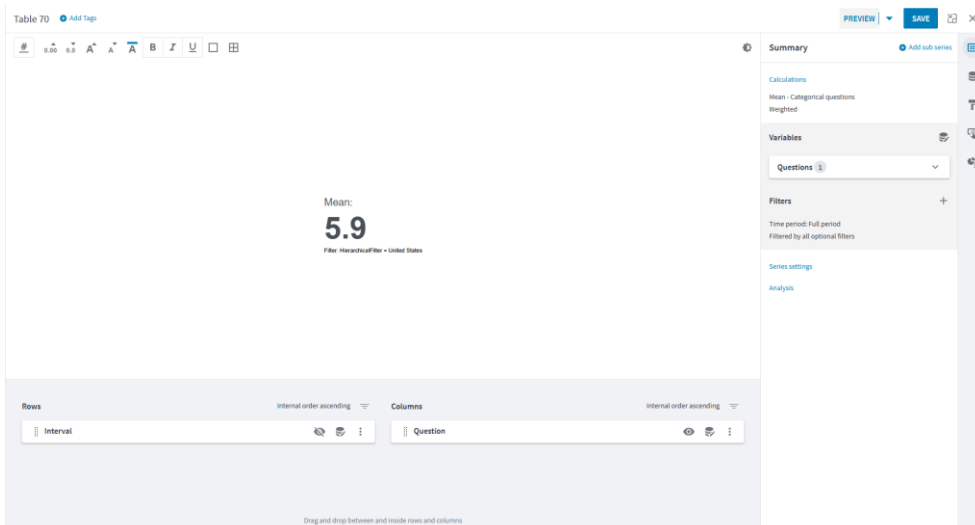
All objects follow the same overall setup structure.

In the example below, we refer to Charts and Tables. Other data objects may contain smaller differences, but the structure remains consistent across all objects.

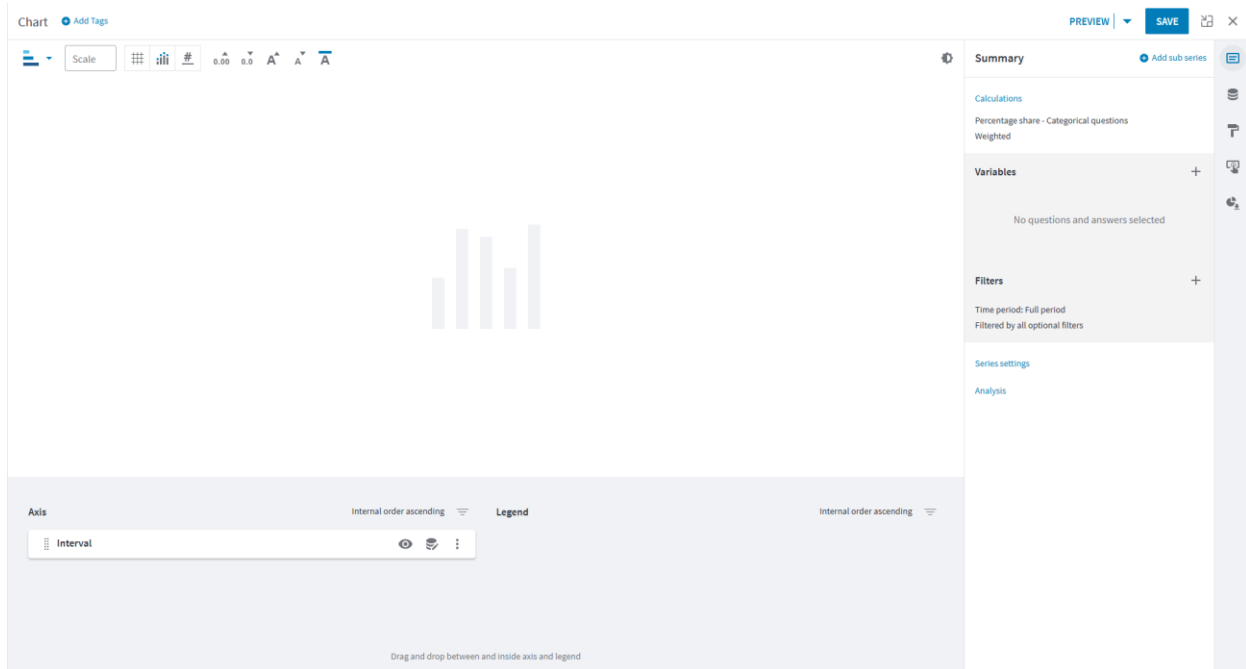
### Charts



### Tables



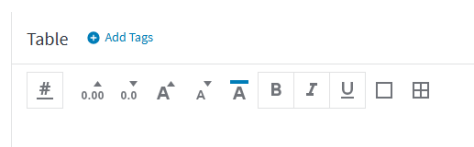
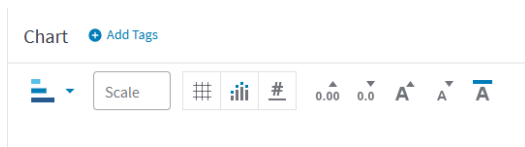
When creating a new object, a full-screen setup mode opens.



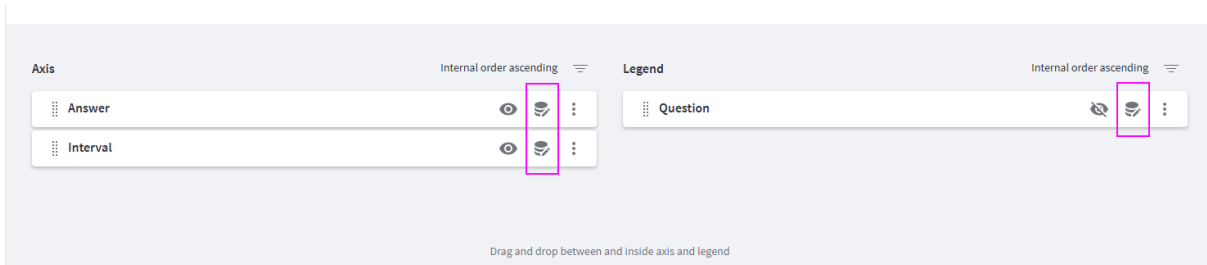
The main navigation is placed on the right side and includes:

- Summary
- Data
- Format
- Events
- Export Settings

Frequently used settings are also available as quick buttons at the top. Additional shortcuts are available for items such as axis and legend settings.



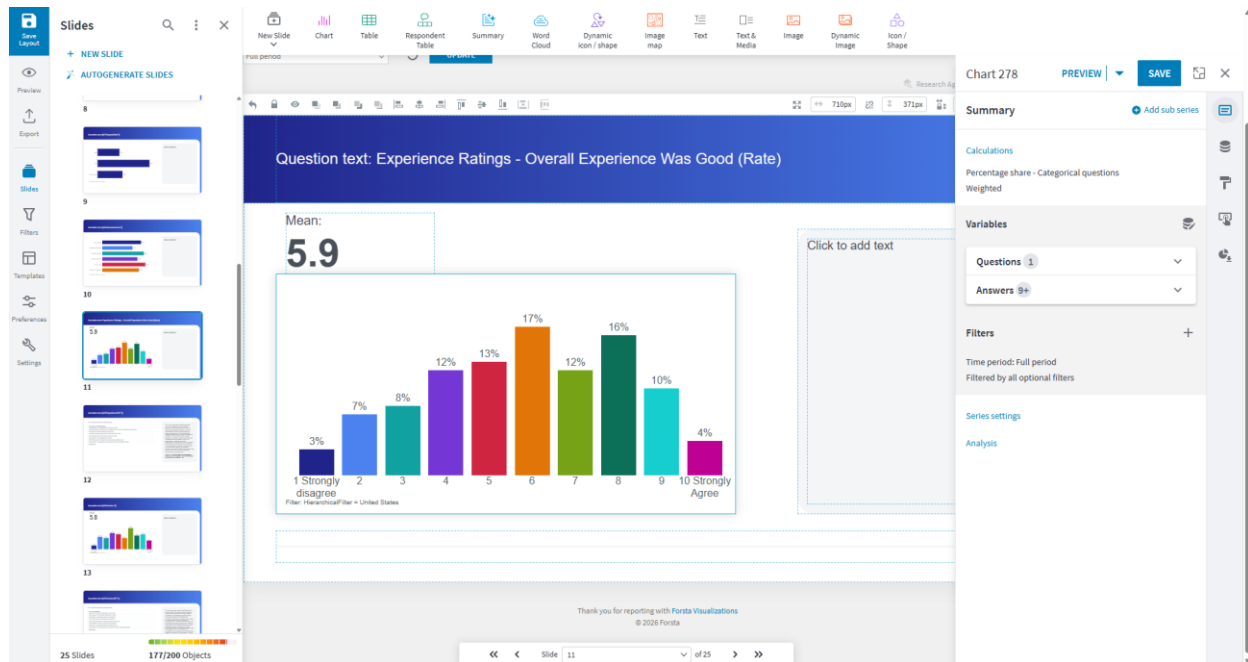
### Examples of shortcuts



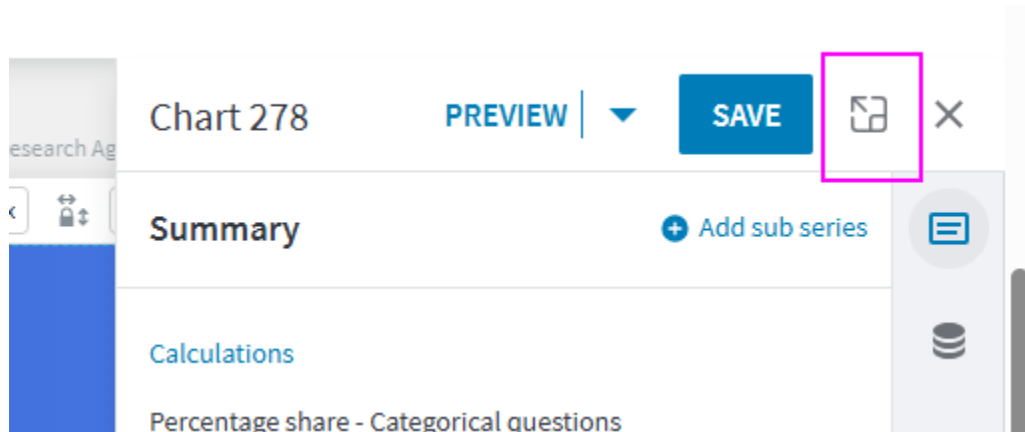
### Editing an existing object

When editing an existing object, a side-panel mode opens on the right-hand side. This panel contains the same structure as the full-screen mode.

In this mode, you can directly view a summary of enabled settings and update existing settings. To see your latest updates, you can click Preview and see how it looks directly in the canvas.



You can switch between full-screen mode and side-panel mode using the Full screen icon in the upper right corner.



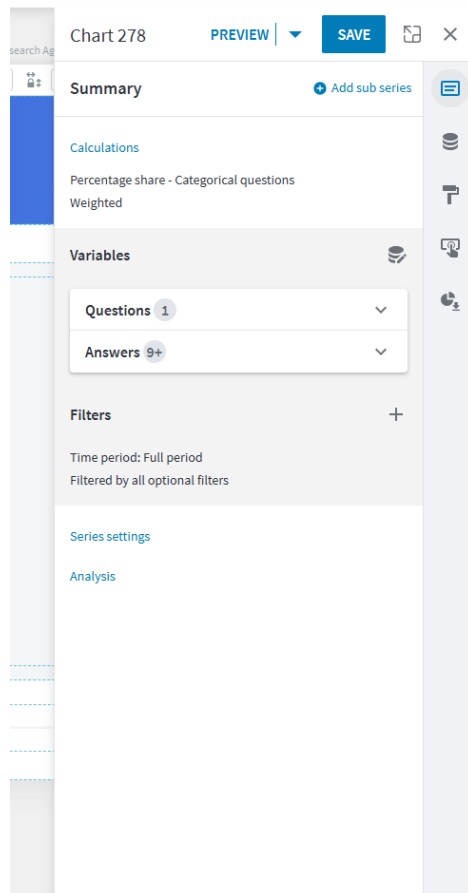
**NOTE**

***Respondent Table, Summary and Word Cloud do not have a full-screen mode, as all settings are managed directly in the right-side panel.***

## Object tabs

### Summary

This tab gives you direct access to setting up and editing questions and filters. It also provides an overview of the settings enabled for the object. You can add series and use shortcuts to quickly access specific features.



### **TIP!**

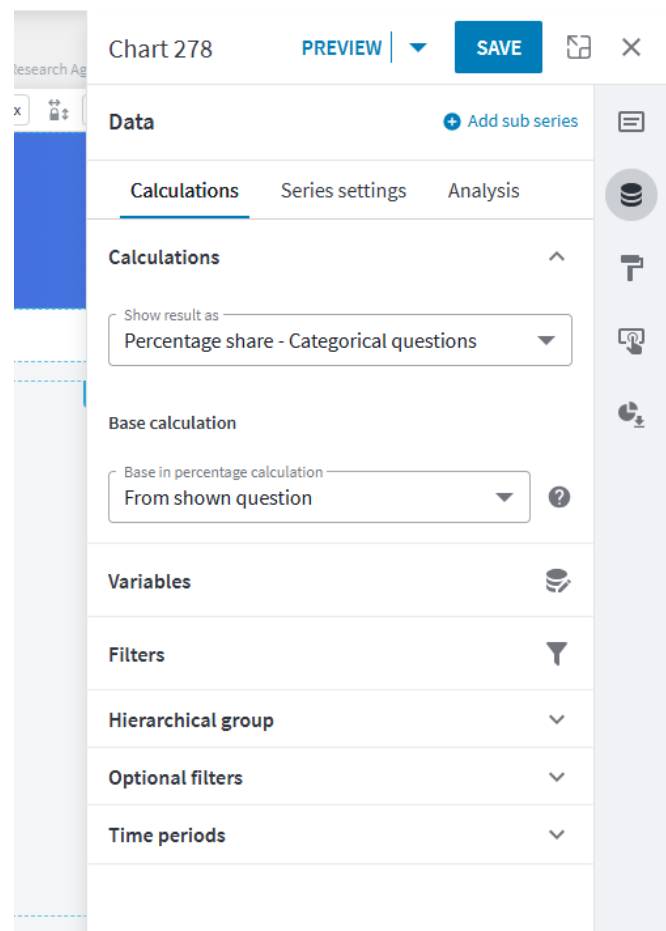
***If you need to quickly QA the settings applied to your objects, open the Summary tab and move between objects directly in the canvas. The Summary will automatically update for each object, allowing you to review filters and other key settings without opening and closing every object.***

## Data

Under Data there are three sub tabs.

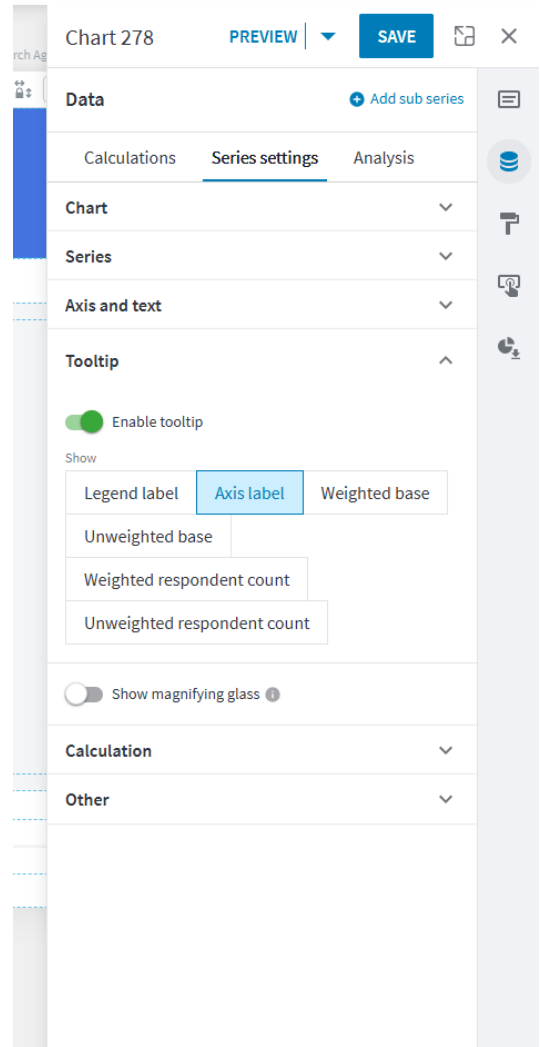
- Calculations – Includes items previously found under Variables, Filters and Time selections.

- Calculations
  - Select calculation for your object
- Variables
  - Select your question/s and answer/s
- Filters to be applied
  - Add in-object filters
- Hierarchical group
  - Specify hierarchical filter settings
- Optional filters
  - Specify what report filters should be applied
- Time Periods
  - Select time period, interval and moving average used

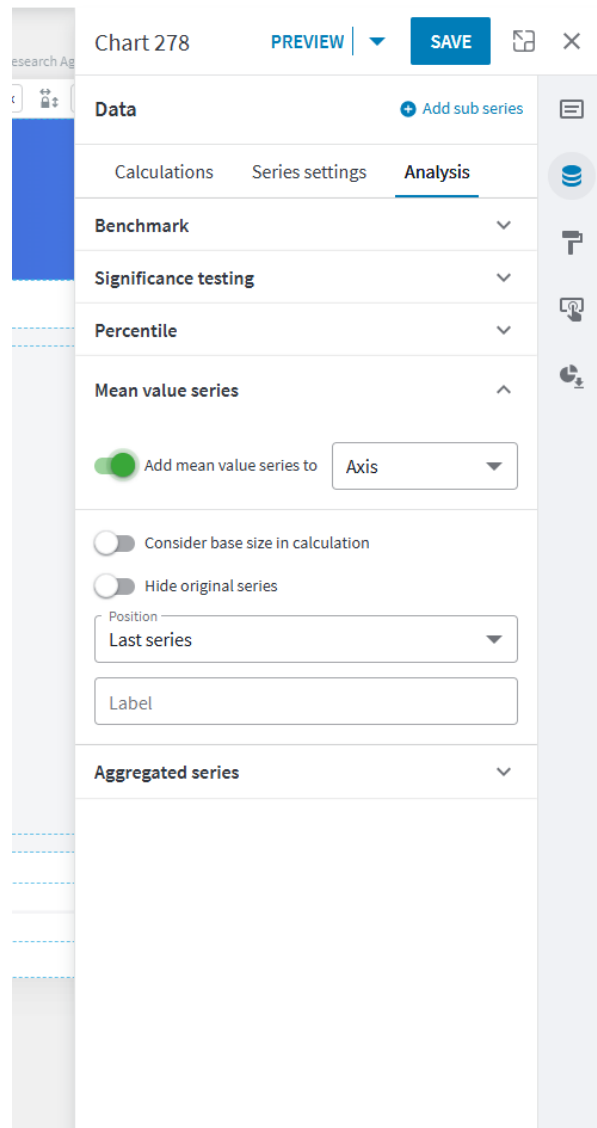




- Series settings – Includes items previously found under Settings, excluding Time Selections and Export options
  - Chart
    - Select chart options such as type and how base size should be shown
  - Series
    - Select series options such as base suppression
  - Axis and text
    - Select what how and what text should be shown on axis
  - Tooltip
    - Specify Tooltips
  - Calculation
    - Select weight variables
  - Other
    - Additional options available for your object



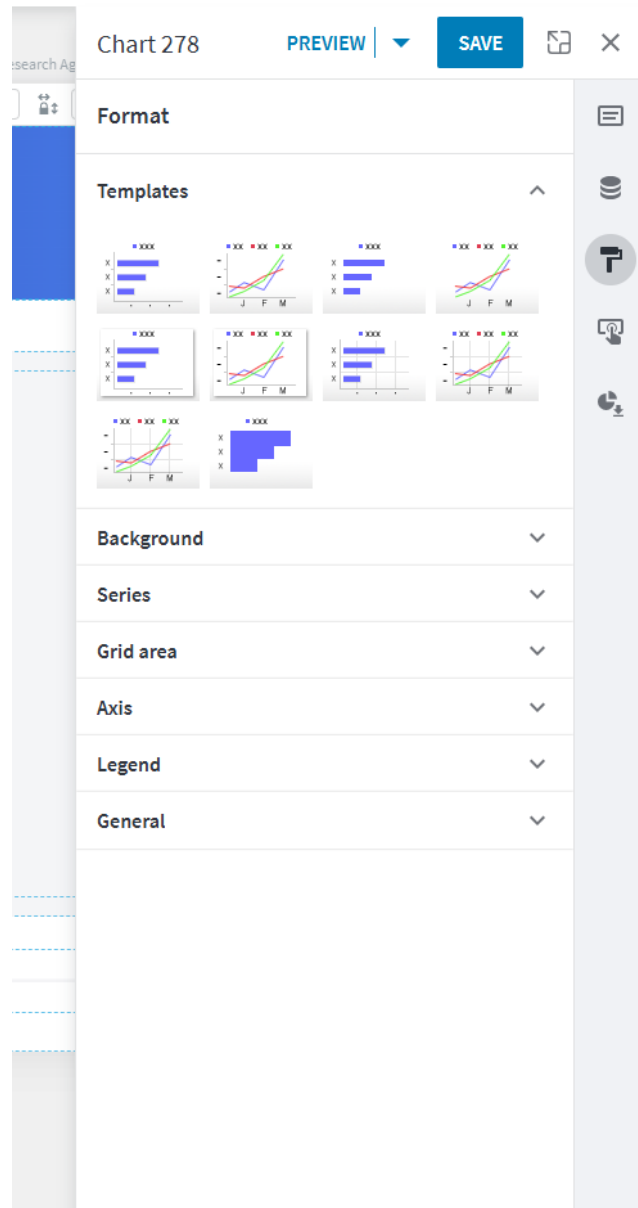
- Analysis – Includes items previously found under Analysis.
  - Benchmark
  - Significance testing
  - Percentile
  - Mean value series
  - Aggregated series



### Format

This section includes layout and styling options previously found under Layout.

- Layout templates
- Background (Charts)
- Series (Charts)
- Grid area (Charts)
- Axis (Charts)
- Legend (Charts)
- General
- Boarder (Tables)
- Row headers (Tables)
- Column headers (Tables)
- Information text (Tables)





### Events

Manage any events triggered by click or hover actions here.

Chart 278    PREVIEW | ▾    SAVE    [Copy]    [Close]

Research Ag

xx [Settings] [Close]

Events		[List Icon]
Click	+	[Click Icon]
Hover	+	[Hover Icon]

[Copy Icon] [Share Icon]

### Export settings

This section includes export-related options previously found under Settings and Other:

- Individual exports
- Editable PowerPoint exports

