

Forsta Visualizations July 2026 Release



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1.Introduction

This document describes new and improved features in the Forsta Visualizations July 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.Data management

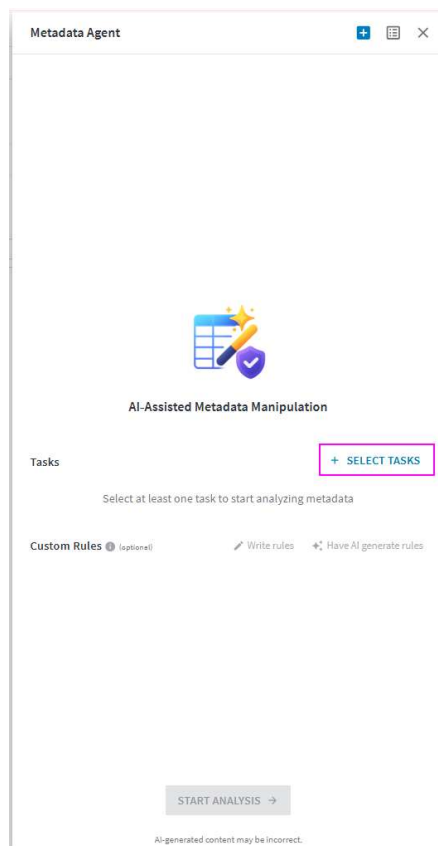
Metadata Agent – additional tasks

We have significantly expanded the capabilities of the Metadata Agent, allowing AI to assist with more aspects of metadata management.

In addition to updating question labels, answer labels, question types, and recommending filters, the Metadata Agent now supports updating question and answer colors, sorting, tags, blocks, groupings, and identifying questions that may be suitable for deletion.

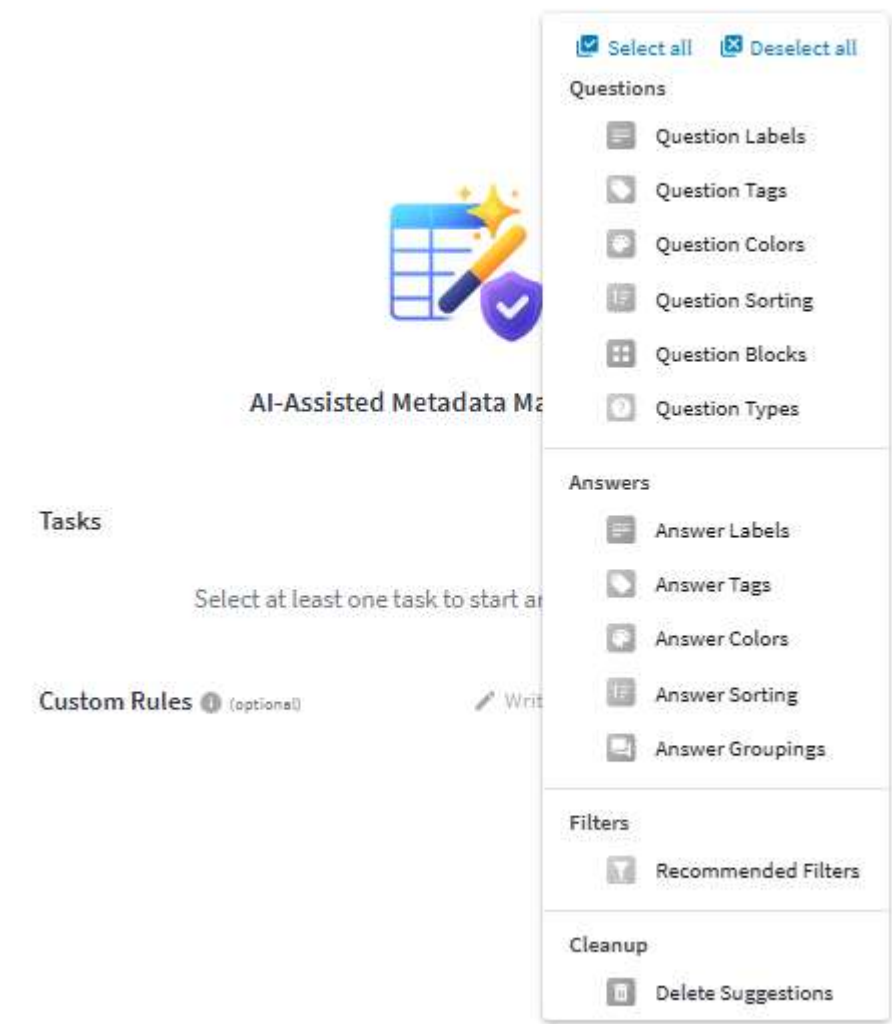
Expanded Metadata Agent capabilities

To support the additional tasks, we have also updated the task selection interface to make it easier to configure analyses.





Tasks are now organized into four categories, allowing you to quickly locate and select the type of metadata updates you want the AI to perform. You can also use **Select all** and **Deselect all** to quickly manage your task selection.





The available tasks are:

Questions

- Question Labels
- Question Tags
- Question Colors
- Question Sorting
- Question Blocks
- Question Types

Answers

- Answer Labels
- Answer Tags
- Answer Colors
- Answer Sorting
- Answer Groupings

Filters

- Recommended Filters

Cleanup

- Delete Suggestions

Custom Rules

Custom Rules allow you to define your own rules for how the Metadata Agent performs the selected tasks. Rules can be written manually or generated by AI, giving you greater control over how suggestions are generated.

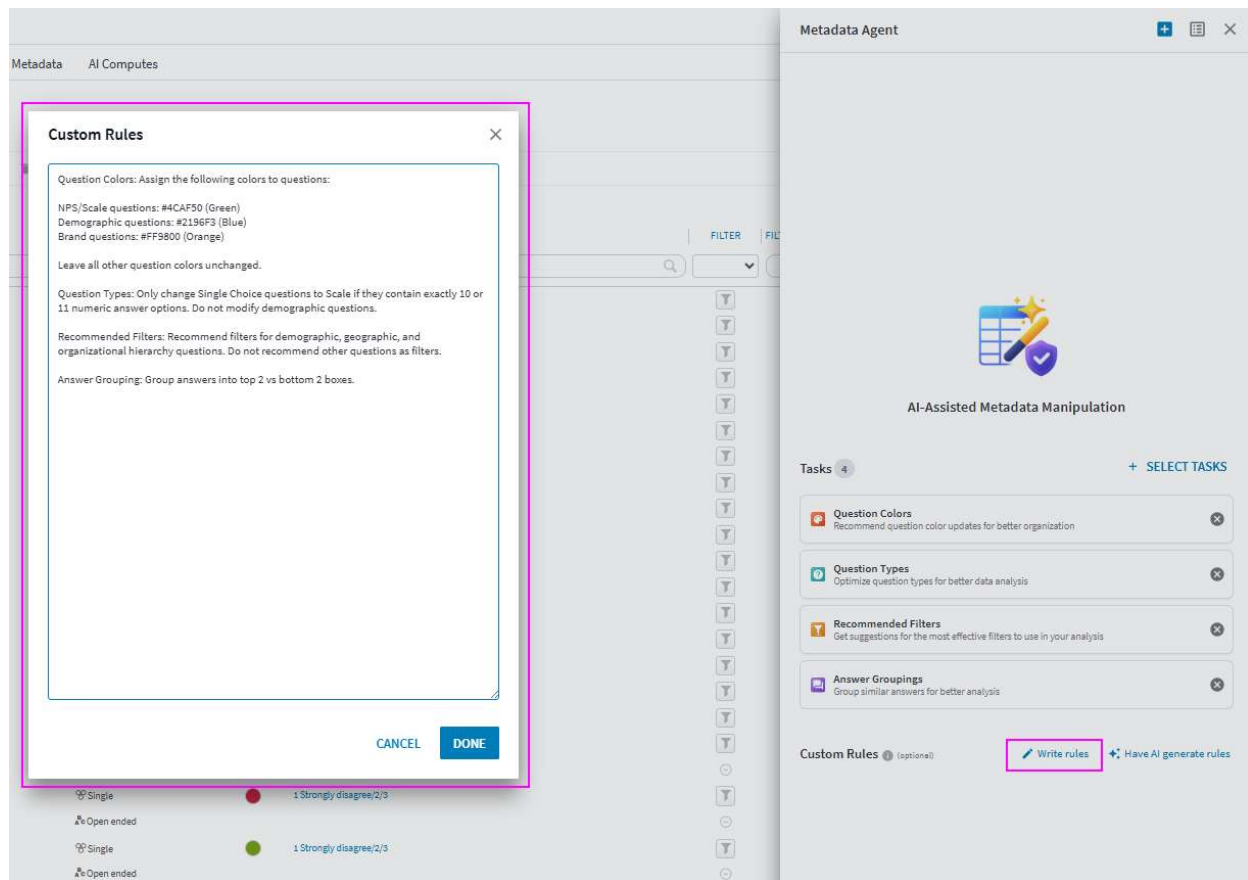
CHANGE OF BEHAVIOR

When Custom Rules are defined, they now replace the default rules used by the Metadata Agent for all selected tasks.

The Metadata Agent will still perform the selected tasks, but it will follow your Custom Rules instead of the default rules when generating its suggestions.

To help you get started, click **Have AI generate rules**. Based on the selected tasks, the Metadata Agent will suggest a set of rules that you can use as-is or modify before running the analysis.

You can also enter your own rules directly in the text area to tailor the analysis to your organization's requirements or project-specific needs.



The screenshot displays the 'Metadata Agent' interface. On the left, a 'Custom Rules' dialog box is open, containing the following text:

Custom Rules

Question Colors: Assign the following colors to questions:

- NPS/Scale questions: #4CAF50 (Green)
- Demographic questions: #2196F3 (Blue)
- Brand questions: #FF9800 (Orange)

Leave all other question colors unchanged.

Question Types: Only change Single Choice questions to Scale if they contain exactly 10 or 11 numeric answer options. Do not modify demographic questions.

Recommended Filters: Recommend filters for demographic, geographic, and organizational hierarchy questions. Do not recommend other questions as filters.

Answer Grouping: Group answers into top 2 vs bottom 2 boxes.

At the bottom of the dialog are 'CANCEL' and 'DONE' buttons.

On the right, the 'Metadata Agent' panel shows a list of tasks under the heading 'AI-Assisted Metadata Manipulation':

- Question Colors**: Recommend question color updates for better organization
- Question Types**: Optimize question types for better data analysis
- Recommended Filters**: Get suggestions for the most effective filters to use in your analysis
- Answer Groupings**: Group similar answers for better analysis

Below the tasks, there is a 'Custom Rules' section with two buttons: 'Write rules' (highlighted with a pink box) and 'Have AI generate rules'.

BEST PRACTICE

When using Custom Rules with multiple tasks, make sure your rules clearly specify how each selected task should be handled.

If different tasks require different rules, consider grouping similar tasks together or running separate analyses for tasks that require unique rules. This gives you greater control over the generated suggestions and makes the results easier to review.

Example

If you are updating **Question Labels** and **Question Colors** in the same analysis, your Custom Rules could look like this:

Question Labels

- Convert all labels to Sentence case.
- Do not modify demographic questions.

Question Colors

- Color NPS questions #2E7D32.
- Color demographic questions #1565C0.
- Leave all other question colors unchanged.

Refining the analysis

Once the analysis is completed, the suggested changes are grouped by category, making it easier to review the recommendations before deciding which changes to apply.

The selected tasks and any Custom Rules remain visible throughout the analysis and on the results page. This allows you to review the rules used to generate the suggestions, make adjustments if needed, and rerun the analysis.

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Metadata Agent

Question Colors, Question Types, Answer Groupings, Recommended Filters

Custom rules >

Below are suggested updates for your project metadata.
Review each section and decide which suggestions to accept.
Any suggestions you don't accept will remain unchanged.

QUESTIONS

Question Colors

28

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▼

Question Types

6

⋮

▼

ANSWERS

Answer Groupings

11

⋮

▼

FILTERS

Recommended Filters

4

⋮

▼

Tasks 4

Question Colors, Question Types, Answer Groupings, Recommended Filters

▼

Custom Rules (optional)

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Question Colors: Assign the following colors to questions: NPS/Scale questions: #4CAF50 (Green) Demographic questions: #2196F3 (Blue) Brand questions: #FF9800 (Orange) Leav...

Show more

START ANALYSIS →

AI-generated content may be incorrect.

forsta.com

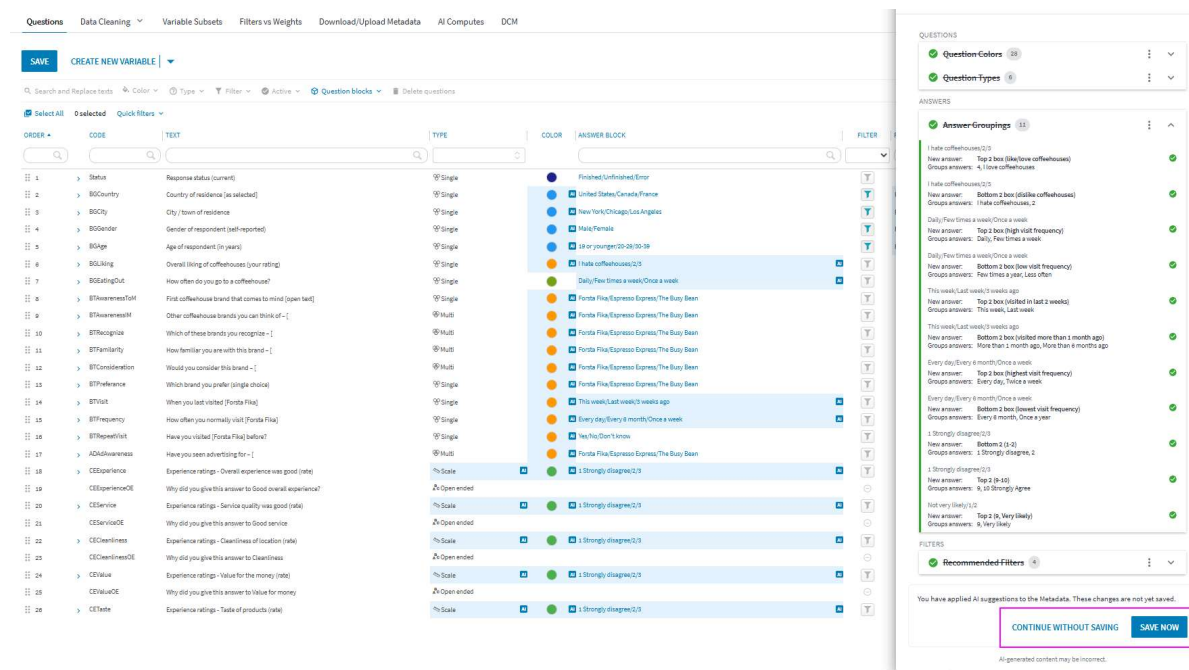
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From the results page, you can:

- Modify your Custom Rules.
- Add or remove analysis tasks.
- Run additional analyses without starting a new Metadata Agent session.
- Review and compare suggestions from multiple analyses before deciding which changes to apply.

This iterative workflow makes it easy to refine one task at a time. For example, you can focus on **Question Labels**, adjust the rules until you are satisfied with the suggestions, then continue with **Question Types** or other tasks. All accepted changes from multiple analyses remain available and can be reviewed together before saving them to the project in a single operation.

Once you have reviewed the suggestions, you can either **Save now** to apply the selected changes to your project or choose **Continue without saving** to keep the approved changes while continuing to refine the analysis. This allows you to perform multiple analyses, adjust tasks and Custom Rules between each execution, and combine approved changes from several analyses before saving everything to the project in a single operation.



The screenshot displays the Forsta Metadata Agent interface. The main panel shows a list of questions with columns for ORDER, CODE, TEXT, TYPE, COLOR, and ANSWER BLOCK. The questions are numbered 1 through 26. The right sidebar shows the 'ANSWERS' section with 'Question Colors' and 'Question Types' filters. The bottom bar indicates that AI suggestions have been applied to the metadata and provides buttons for 'CONTINUE WITHOUT SAVING' and 'SAVE NOW'.

ORDER	CODE	TEXT	TYPE	COLOR	ANSWER BLOCK
1	Q1	Response status (current)	Single	Finished (Unfinished/Empty)	
2	Q2	Country of residence (as selected)	Single	United States/Canada/France	
3	Q3	City / town of residence	Single	New York/Chicago/Los Angeles	
4	Q4	Gender of respondent (self-reported)	Single	Male/Female	
5	Q5	Age of respondent (in years)	Single	18 or younger/20-29/30-39	
6	Q6	Overall liking of coffeehouses (your rating)	Single	I hate coffeehouses/2/5	
7	Q7	How often do you go to a coffeehouse?	Single	Daily/Few times a week/Once a week	
8	Q8	First coffeehouse brand that comes to mind (open text)	Single	Forsta Fixa/Espresso Express/The Busy Bean	
9	Q9	Other coffeehouse brands you can think of - []	Multi	Forsta Fixa/Espresso Express/The Busy Bean	
10	Q10	Which of these brands you recognize - []	Multi	Forsta Fixa/Espresso Express/The Busy Bean	
11	Q11	How familiar you are with this brand - []	Multi	Forsta Fixa/Espresso Express/The Busy Bean	
12	Q12	Would you consider this brand - []	Multi	Forsta Fixa/Espresso Express/The Busy Bean	
13	Q13	Which brand you prefer (single choice)	Single	Forsta Fixa/Espresso Express/The Busy Bean	
14	Q14	When you last visited (Forsta Fixa)	Single	This week/Last week/3 weeks ago	
15	Q15	How often you normally visit (Forsta Fixa)	Single	Every day/Every 6 months/Once a week	
16	Q16	Have you visited (Forsta Fixa) before?	Single	Yes/No/Don't know	
17	Q17	Have you been advertising for - []	Multi	Forsta Fixa/Espresso Express/The Busy Bean	
18	Q18	Experience ratings - Overall experience was good (rate)	No Scale	1 Strongly disagree/2/5	
19	Q19	Why did you give this answer to Good overall experience?	Open ended		
20	Q20	Experience ratings - Service quality was good (rate)	No Scale	1 Strongly disagree/2/5	
21	Q21	Why did you give this answer to Good service?	Open ended		
22	Q22	Experience ratings - Cleanliness of location (rate)	No Scale	1 Strongly disagree/2/5	
23	Q23	Why did you give this answer to Cleanliness?	Open ended		
24	Q24	Experience ratings - Value for the money (rate)	No Scale	1 Strongly disagree/2/5	
25	Q25	Why did you give this answer to Value for money?	Open ended		
26	Q26	Experience ratings - Taste of products (rate)	No Scale	1 Strongly disagree/2/5	

3.Data connectivity

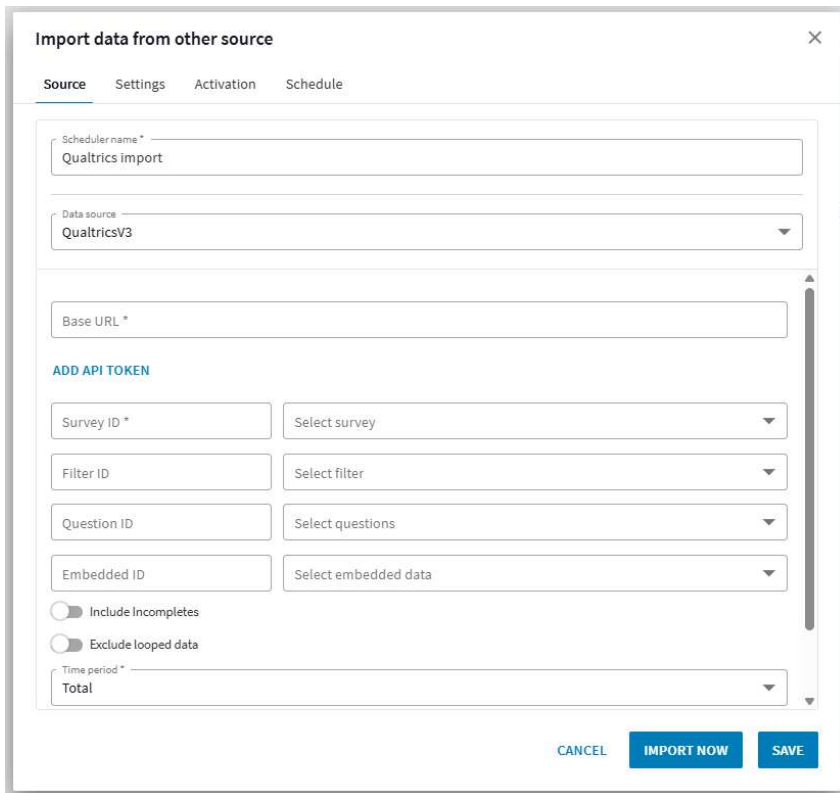
QualtricsV3 integration

This release introduces support for the **QualtricsV3** integration. In addition to existing Qualtrics import capabilities, this version adds support for surveys containing looped data and provides additional options for controlling what data is imported.

The integration supports importing survey responses, questions, and embedded data through the Qualtrics API. You can choose which survey to import, apply saved Qualtrics filters, limit the imported questions or embedded data, and configure how incomplete responses, looped data, and time periods should be handled.

NOTE!

The QualtricsV3 integration is disabled by default. Please contact Support or your Forsta representative to have it enabled on your account.



The screenshot shows a dialog box titled "Import data from other source" with a close button (X) in the top right corner. The dialog has four tabs: "Source", "Settings", "Activation", and "Schedule". The "Source" tab is active, showing the following fields and options:

- Scheduler name ***: A text input field containing "Qualtrics import".
- Data source**: A dropdown menu with "QualtricsV3" selected.
- Base URL ***: A text input field.
- ADD API TOKEN**: A blue link.
- Survey ID ***: A text input field next to a dropdown menu labeled "Select survey".
- Filter ID**: A text input field next to a dropdown menu labeled "Select filter".
- Question ID**: A text input field next to a dropdown menu labeled "Select questions".
- Embedded ID**: A text input field next to a dropdown menu labeled "Select embedded data".
- Include Incompletes**: A toggle switch.
- Exclude looped data**: A toggle switch.
- Time period ***: A dropdown menu with "Total" selected.

At the bottom of the dialog, there are three buttons: "CANCEL", "IMPORT NOW", and "SAVE".

How to create an import task

To create a new Qualtrics import, create a new import task from the option “Import data from other source” and select **QualtricsV3** as the **Data source**.

Provide the **Base URL** for your Qualtrics installation together with a valid **API Token**. Once connected, the available surveys, filters, questions, and embedded data will automatically be retrieved from Qualtrics and made available for selection.

Import settings

The following section describes each available setting when configuring a **QualtricsV3** import.

Scheduler name

The **Scheduler name** is an internal name used within Forsta Visualizations to identify the import task. This name is displayed in the Scheduled Task overview and does not affect the imported data.

Data source

If multiple data integrations are available within your installation, select **QualtricsV3** from the **Data source** dropdown.

Base URL

Enter the **Base URL** for your Qualtrics environment. This is the server URL that will be used when connecting to the Qualtrics API.

API Token

Click **Add API Token** and paste a valid Qualtrics API Token.

The API Token can be generated directly within Qualtrics under **My Account -> Account Settings**.

Select Survey

The **Select survey** list displays all surveys that your API Token has permission to access. Select the survey you want to import into your Forsta Visualizations project.

Select filter

The **Select filter** list displays all saved filters available in the **Data & Analysis -> Data** view within the selected Qualtrics survey.

Selecting a filter limits the imported respondents to those matching the selected filter.

Select questions

The **Select questions** list displays all survey questions available within the selected survey.

If no questions are selected, all survey questions will be imported.

If one or more questions are selected, only the selected questions will be imported.

Select embedded data

The **Select embedded data** list displays all Embedded Data fields available within the selected survey.

If no fields are selected, all Embedded Data fields will be imported.

If one or more fields are selected, only the selected fields will be imported.

Include incompletes

Enable **Include Incompletes** to include respondents who have not completed the survey.

This option is based on the Qualtrics **Finished** variable. When enabled, respondents where **Finished = False** will also be imported. When disabled, only completed respondents where **Finished = True** will be included in the import.

Exclude looped data

The **QualtricsV3** integration supports importing surveys containing looped data.

Enable **Exclude Loops** if you want to omit all looped questions and their associated data from the import. When disabled, looped data will be included in the imported dataset.

Time period

The **Time period** setting controls which respondents are included in the import based on their response date.

The following time period options are available when importing data from Qualtrics:

- **Total** - Imports all available respondents.
- **Static** - Imports respondents within a specified date range.
- **Floating** - Imports respondents within a moving date range.
- **Auto** - Imports respondents that have been created or modified since the previous import.

NOTE!

When Auto is selected as the Time period, any selected Qualtrics filter will be ignored. The import will instead retrieve respondents based solely on the automatic time period calculation.

When determining the response date, the integration uses the following priority:

- End Date
- Start Date (if End Date is not available)
- Current Date (if neither End Date nor Start Date is available)

NOTE!

All imported date variables are converted to UTC before being imported into Forsta Visualizations. This ensures consistent reporting regardless of the server's local time zone.

Imported system variables

In addition to the imported survey data, the QualtricsV3 integration automatically creates and populates the following system variables.

Respondent ID

Each imported respondent is assigned a unique **Respondent ID**, which is used as the primary identifier within Forsta Visualizations.

The Respondent ID is automatically generated from the original Qualtrics **Response ID**, ensuring that the same respondent receives the same Respondent ID across repeated imports. The original **Response ID** is also imported, allowing respondents to be traced back to Qualtrics when needed.

Response Date

A **Response Date** is automatically assigned to every imported respondent using the following priority:

- End Date
- Start Date (if End Date is not available)
- Current Date (if neither End Date nor Start Date is available)

This variable is used throughout Forsta Visualizations for time-based reporting.

Weight

If a field named **weight** exists in the imported survey data, it will automatically be used as the project's Weight variable.

If no **weight** field exists, all respondents will automatically be assigned a weight of **1**.

4. Project administration

Legacy Admin interface

As announced earlier this year, the **Switch to old interface** option has now been removed from the **Admin pages**.

This change applies only to the Admin pages. The StoryTeller interface is not affected by this update.

If you have any questions or concerns regarding the updated Admin interface, please contact Support or your Forsta representative.