

Additions to Dapresy Pro 9.1 (January to June 2015)



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1 Introduction

This document describes new features added to Dapresy Pro version 9.1 during patches in January-April 2015. The new features are split up by functionality area and not by patch date.

- Chapter 2 describes Storyteller improvements
- Chapter 3 describes news in Cross table tool
- Chapter 4 describes news in Data administration
- Chapter 5 and 6 describes news in Event server
- Chapter 7 describes the new Icon and Shape library

If you want to know more about these features please contact Dapresy Global Support at: support@dapresy.com and they will be able to assist you.

Best Regards,
Dapresy Team 2015

Email: support@dapresy.com

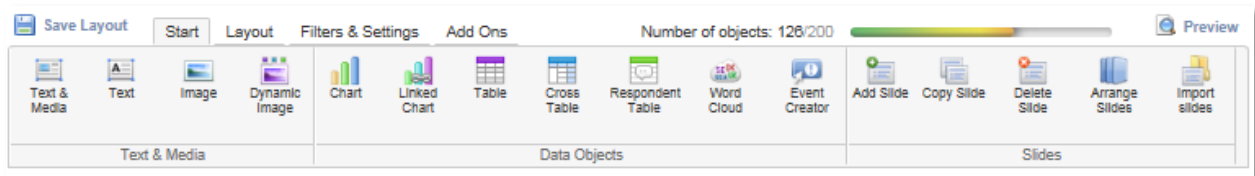
2 Storyteller

2.1 Object counter

We have noticed that many reports exceed the maximum number of objects per report, stated in the acceptance use policy document (AUP), which is 200. More objects require longer loading times and the end user experience is not always sufficient.

To guide you during the setup an “object counter” is now shown in the top of the page which shows the number of used objects. As stated in the AUP document Dapresy strongly advises to use less than 200 objects per report. When more objects are required, the report should be split up into several reports.

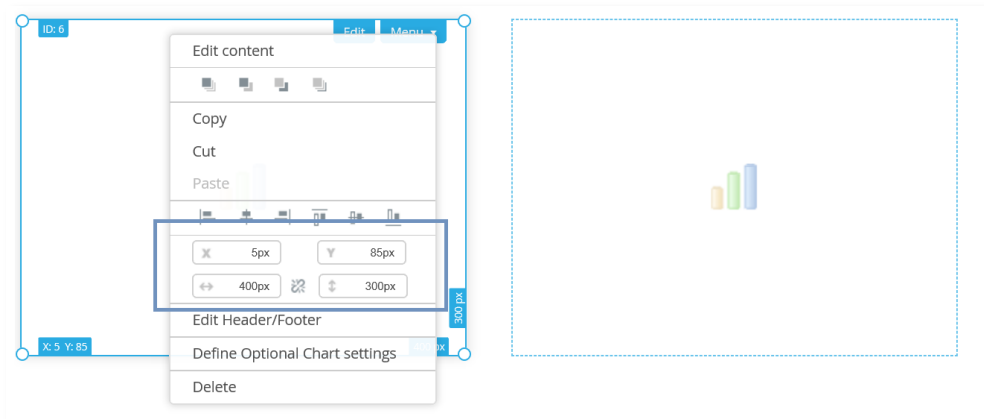
The image below shows the new Object counter in the top right corner.



2.2 Size and position of Storyteller objects

The context menu of the Storyteller objects has been updated. This allows you to enter the exact size and position of the object (rather than using drag and drop), allowing you to quickly achieve the desired layout and also align objects between different pages, etc.

The options for setting the size and position are in the context menu, as seen in the image below.



You can also edit multiple objects simultaneously. Simply select multiple objects, right click to get the context menu, and then set the desired size or position.

2.3 Distribute objects horizontally/vertically

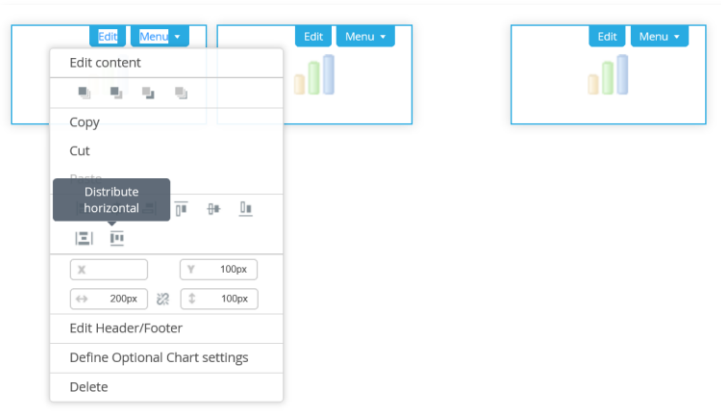
New support has been added to allow objects to be distributed horizontally or vertically. This makes it much easier to create an aligned layout.

The new option is located in the context menu when three or more objects have been selected. Below is an example of how to use this in order to get an equal distance between three objects.

The image below shows how it looks before the objects are distributed evenly horizontally.



In the image below, all three objects have been selected. The “Distribute horizontally/vertically” option then appears in the context menu.



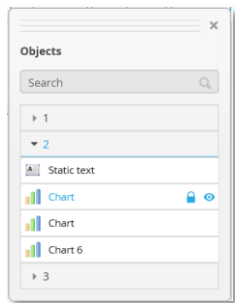
The below image shows the result after the option “Distribute horizontal” has been clicked. See how the objects are now evenly distributed.



2.4 Object panel

An object panel has been added, which makes the setup work more efficiently, especially when it comes to slides that have many objects.

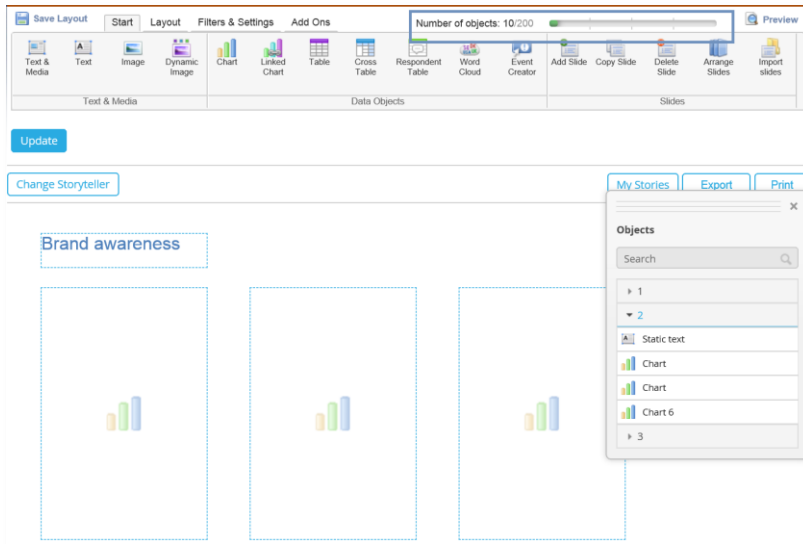
The image below shows the new object panel.



The following features are supported in the object panel:

- Lock objects → a locked object cannot be moved or edited
- Hide objects → perfect to use when two or more objects are placed on top of each other
- Change Z position through drag and drop
- Search for objects based on the object ID
- Select one or more objects

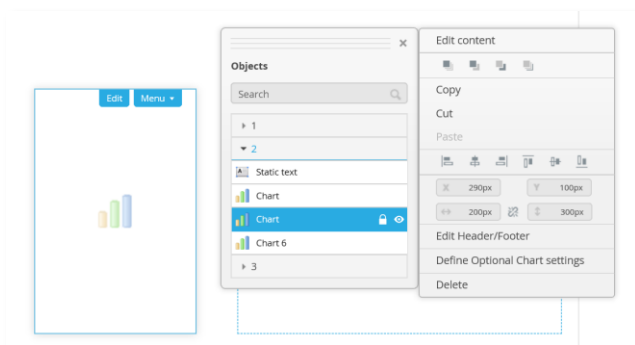
To show the object panel, just click the “Number of objects” area that is highlighted in the image below. The object panel can be moved easily by dragging and dropping. This enables any position on the slide to have all of the objects visible when needed. The object panel closes automatically once you click outside of the panel.



Use any of the three methods below to find the object you are looking for in the object panel:

- Select the desired object on the slide, and then open the object panel. The selected object on the slide is the default option in the object panel.
- Open the object panel and hover your mouse over the objects. The connected objects are highlighted on the slide, which makes it easy to see which object you are hovering over.
- Use the search field on top of the object panel if you know the object ID.

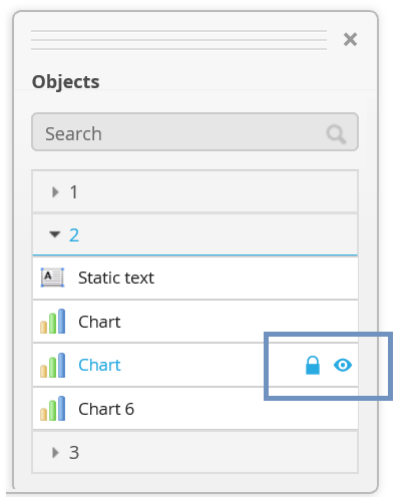
A single click in the object panel will open the context menu (see the image below). A double click opens the Edit window of the selected object.



To lock an object, click the 'Lock' icon as shown in the image below. A locked object cannot be moved or edited.

To hide an object, click the 'Hide' icon as shown in the image below. A hidden object is not shown, which allows you to view and work with objects positioned behind it.

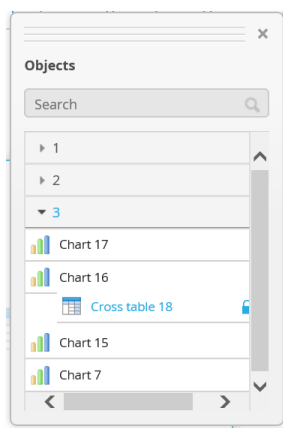
The image below shows the Hide and Lock options.



Note: The state of an object (hidden/locked) is not saved. As soon as you enter the preview mode, changing report, etc. the object will revert back to its former mode.

To change Z position of an object (send forward/send backward), simply drag and drop it. The object in the most front is shown at the top of the object list, and the object in the most back is shown at the bottom of the list. Drag and drop them to update their order.

The image below shows how you can drag and drop in order to change Z position of an object.



2.5 Copy multiple objects

Previously, when you copied and pasted objects, you needed to manually select them in order to move them around. Now, we have updated the logic so that the new copies of an object are set as default so that they can be moved around immediately after being pasted.

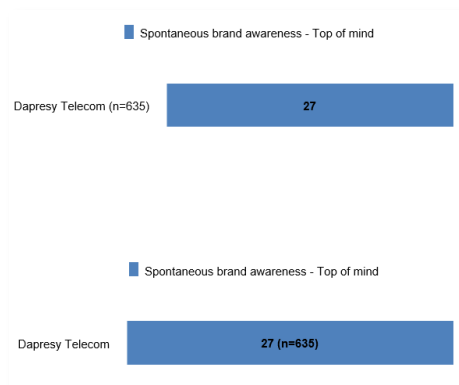
2.6 Select base size position in charts

In the previous version, the position of the base size was made automatically by the system based on predefined rules and the content in the chart. To improve flexibility, it is now possible to customize the position instead of using the default automatic option.

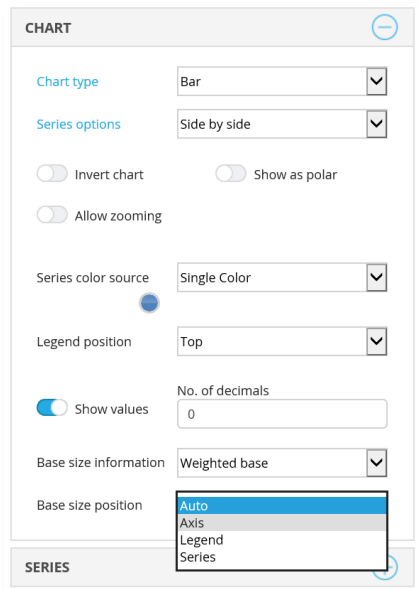
The image below shows the default base size position when a chart shows a question and an answer only. The base size is placed in the legend in this example.



The custom position is used in the two images below. In the first one, the base size is placed in the axis. In the second one, it is placed in the series (in the data label).



To select the position of the base size, just use the setting list that is shown in the image below. 'Auto' is the default option.

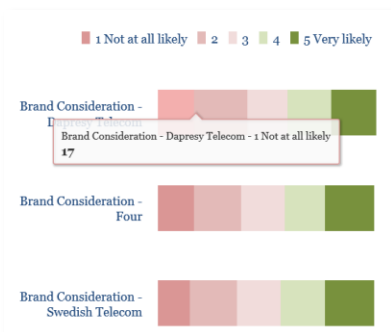


2.7 Tooltip improvements in charts

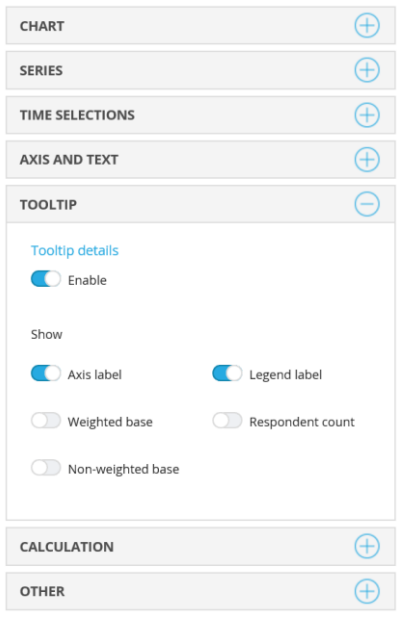
New support has been added so that you can define what content you'd like to show in the tooltip of the chart. The tooltip can also be turned off completely, if desired.

In the previous version, the Axis label was always shown in the tooltip. Now it is possible to select if Axis and/or Legend label should be shown. By default, the tooltip shows the Axis labels.

The image below shows a tooltip with both Axis and Legend labels.



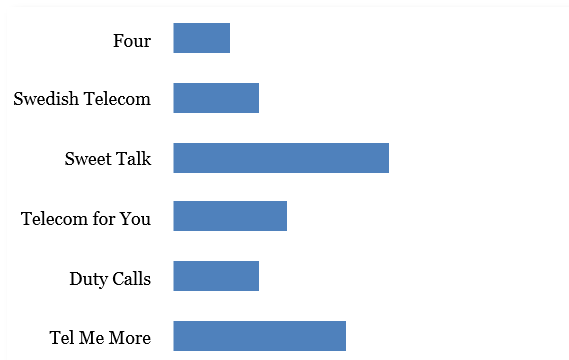
The image below shows the new options in the chart setup window.



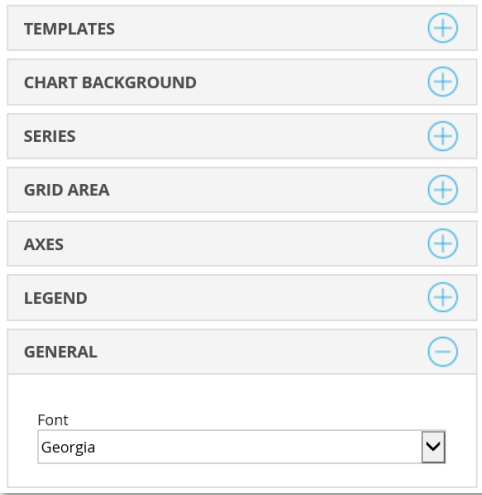
2.8 Select font in charts

During the setup, you can now select the font you would like to use in the charts in order to match the graphical profile. Previously, Arial was always used in the charts.

The image below shows an example of a chart using Georgia.

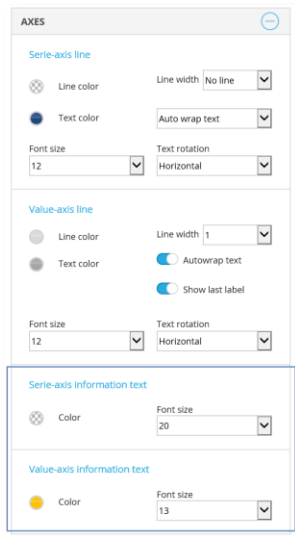


The font is selected in the “layout tab” as shown in the image below. There is one setting, which then applies to all text in the chart.

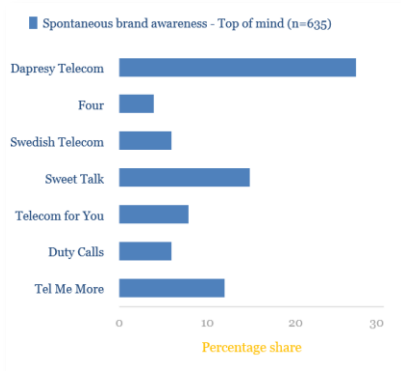


2.9 Style axis information text in charts

The axis texts can now be styled like the other text objects in the chart. The new layout options have been added to the Axis panel, as shown in the image below.



The image below shows an example of a styled X-axis text. The text is shown in orange.

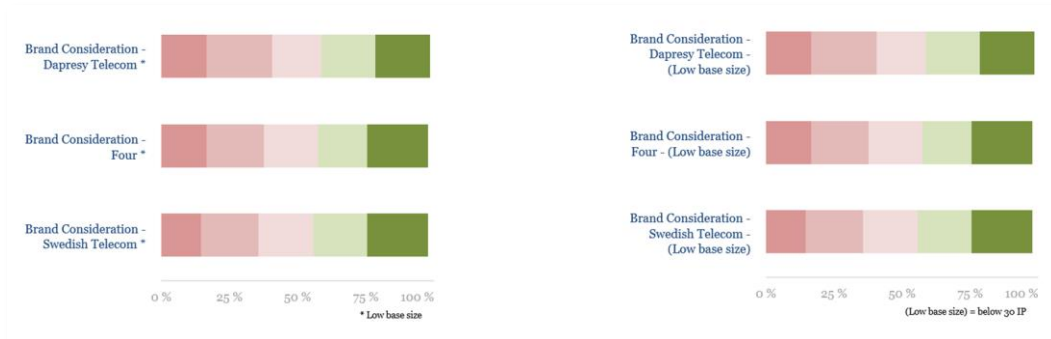


2.10 Customize “Low base” visualization

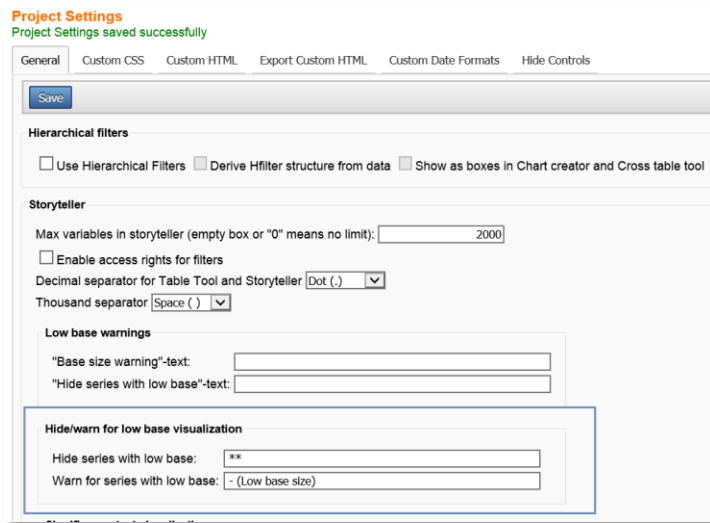
In the Storyteller charts and tables, series with low base size can either be hidden or shown with a warning. A system logic is used where hidden series are shown with ** and series with low base size (are still shown) with a *.

To increase flexibility, a new option has been added which makes it possible to customize the characters shown in charts/tables when the base size is too low. The new option is a setting on a project level and has been placed in the general Project settings page, as shown in the image further down.

Below, the left chart uses the default visualization (), and the right chart uses the new settings.*

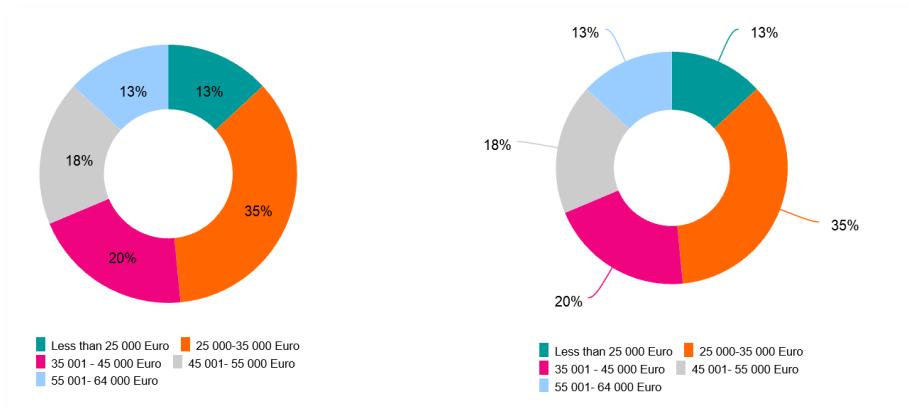


The image below shows where to find the new settings in the general Project selection page.

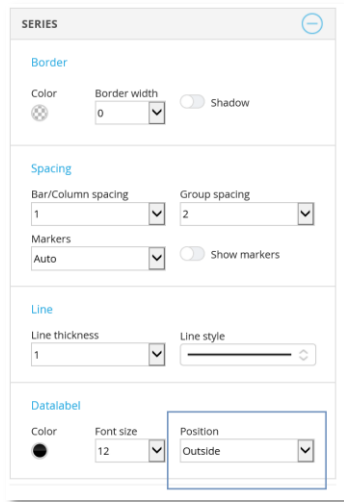


2.11 Donut/Pie Labels

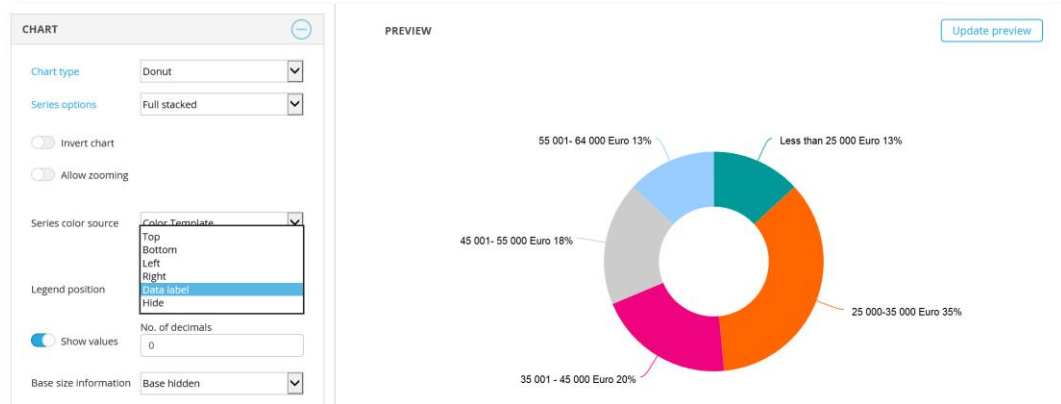
The data labels (the values) in Donuts and Pie charts were previously always shown inside the Donut/Pie as shown in the left example chart below. A new setting has been added which now makes it possible to place the data labels outside the Donut/Pie as shown in the right example chart below. The setting is great to use in cases where parts of the Pie/donut is too small to show the values in.



The setting is made in the Layout tab, in the Series panel in the Position dropdown list shown in the image below. (Note; the options Outside or Inside appears only when Pie or Donut is selected, when for instance bar/column is selected does the list contains Bottom, Middle and Top).



The Legend text can also be shown in the Data label instead of in a separate legend as shown in the image below. The new option is show in the Legend position dropdown list. Below you see where to find the new setting and an example of a pie chart using it.

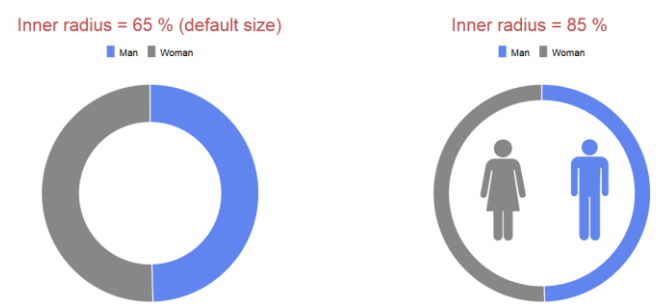


Note: when showing the legend text in the data label make sure the object box is big enough to show the texts so they not are being cut off.

2.12 Donut, thickness of chart

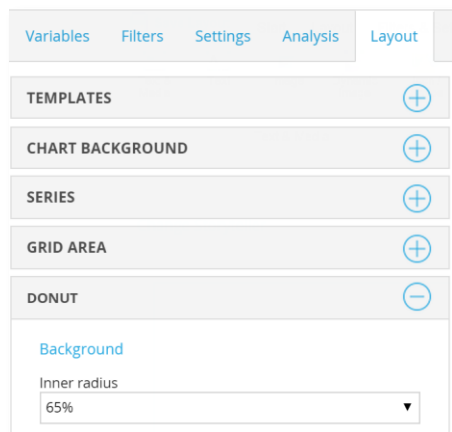
A new setting has been added to control the thickness of the Donut chart. If you use a “thinner” chart, the donut will look more appealing and you will have space to add icons or KPIs values inside the Donut.

Below is an example of thinner chart that has more space for icons, etc.



You can find this new setting under the Layout tab in the Donut panel, as shown below (the panel is only shown when the donut chart is selected).

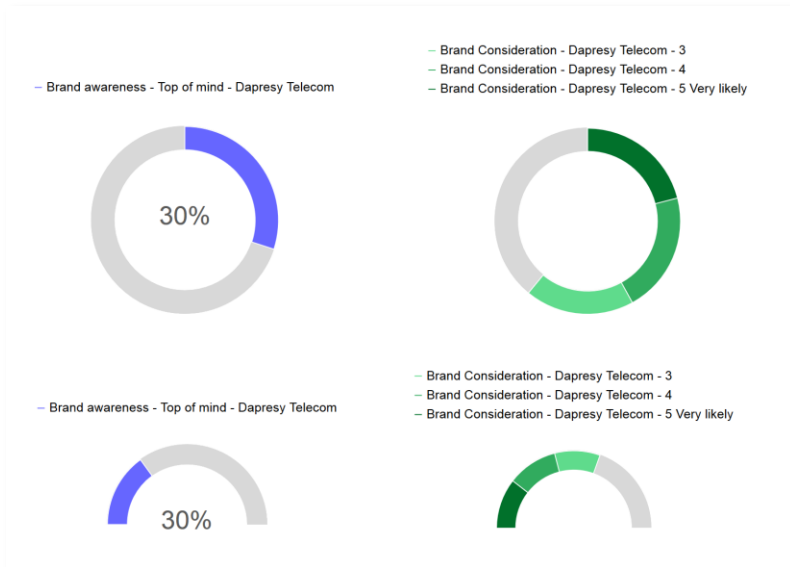
Below you can see the setup panel.



2.13 New chart type - Solid Gauge

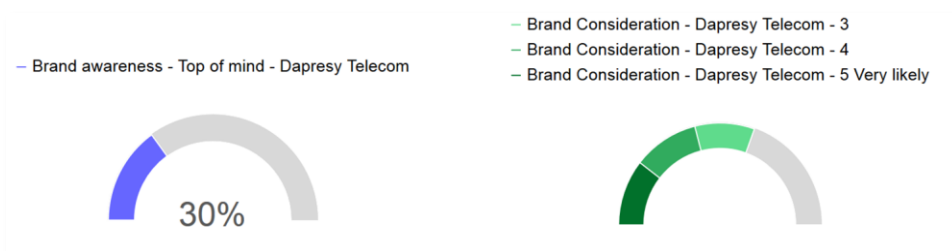
Solid Gauge has been added as a new chart type in Storyteller. The main purpose of the Solid Gauge is to show KPIs and similar values appealingly. The solid Gauge is a mix of a Gauge and a Donut.

Below are a few examples of the Solid Gauge. As you can see, multiple series' can be shown, but the value in the center of the Solid Gauge can only be shown if the Solid Gauge shows one series.



With the Solid Gauge, there are a few limitations when compared to a normal line/column chart.

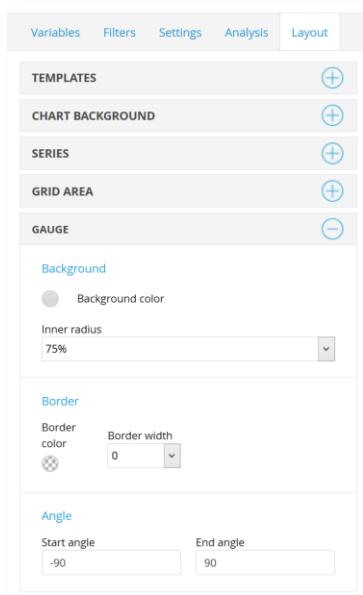
- The series in a Solid Gauge can be Stacked or Full Staked. They cannot be side by side.
- The following functions cannot be used: The “Analysis” functions Significance testing, Mean value series, and Percentiles.
- The sorting of series’ is not supported, like in the normal Gauge chart.
- A Solid Gauge always shows the “data value” in the center of the chart, as you can see in the left chart below. If multiple series’ are shown, the value is not shown, as you can see in the right chart below. It uses the same logic as the normal Gauge.



To create a Solid Gauge, select it from the ordinary chart selection list. Once you’ve selected the Solid Gauge, all items such as answers, questions, compare filters, time intervals, etc. are automatically shown in the Legend.

To define the shape of the Solid Gauge, select Gauge from the Layout tab, as shown in the image below. Use the 'Start Angle' and 'End Angle' to define the shape, from 0 to 360. You can see examples of different shapes in the second image below.

The image below shows the special Gauge layout settings.

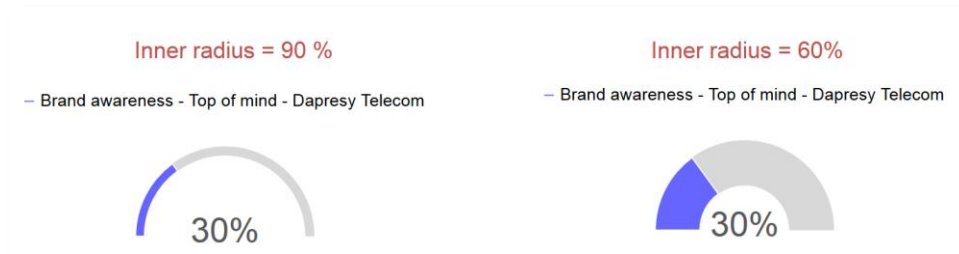


The charts below show a few different start and end angles.



Use the "Inner Radius" setting to define the thickness of the chart (see the setting in the setup image above).

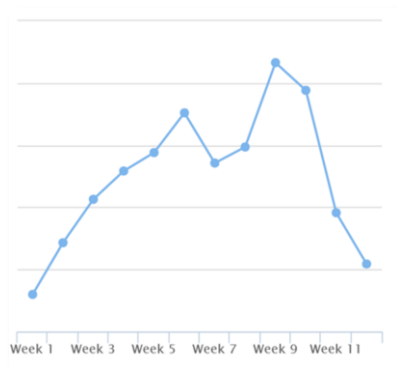
The two charts below show different inner radius settings.



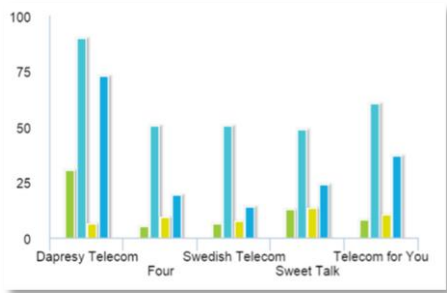
2.14 Series axis labels in charts, Staggered lines and Steps

Your data should be easy to understand. This is why we've increased the flexibility of the label positioning and behavior within the series axis. This new setting allows you to show every other week as labels in time series charts to make them less crowded. Another new setting lets you define the number of staggered lines to use so you can avoid overlapping labels. This is perfect for charts that use long brand names or question labels!

This image shows a time series chart where every other week has been hidden so that the labels don't overlap, the new "Steps" function has been used.



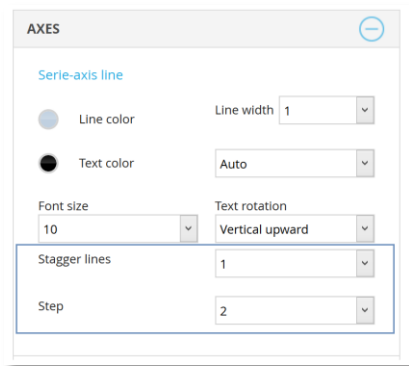
This image shows a chart with staggered lines, which allows you to see the complete labels.



The third party charting component used in Dapresy Pro has initiated this update. Previously, the charting component would automatically stagger the labels when there was not enough space to show the labels in one row. Now, the staggered lines will not appear automatically. Instead, the labels will be cropped if there is not enough space.

Also, your charts currently use staggered lines in the series axis, but the labels might be cropped after this update is implemented. If you do not want the cropped label logic, you can either define the number of staggered lines you would like to use, or define it to only show every second label, etc. This will be a great setting to use in the time series!

The settings are made in the Layout tab, in the Axes panel as shown in the image below.



Note: The Stagger line function can only be used in charts where the series-axes are positioned horizontally (e.g. Lines and Columns but not in charts like Bars, and Vertical lines).

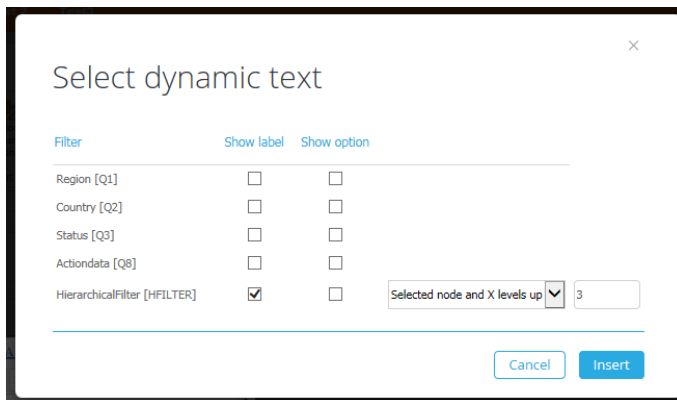
2.15 Dynamic text update to show H-Filter path

In the Storyteller report, the text object can be used to dynamically show the selected items in the optional filter area. When, for example, hierarchical filters are used the name of the selected unit can be displayed in a text box to notify the user about which unit that is selected.

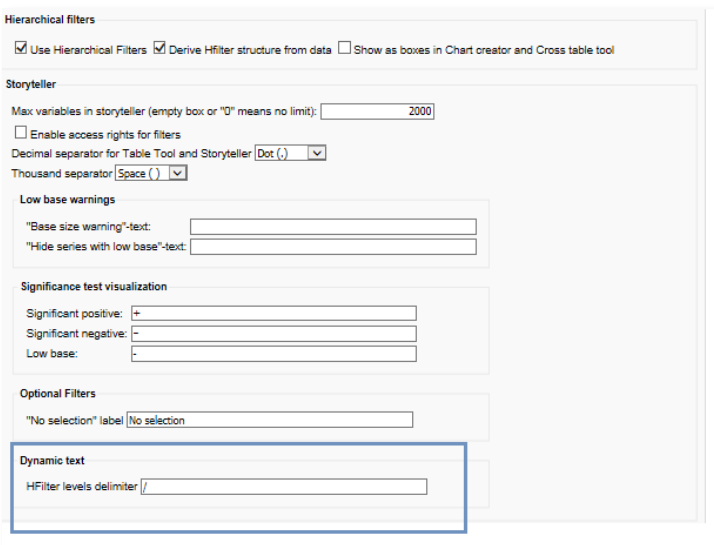
The logic of the Hierarchical filter information has now been improved. Instead of only showing the name of the selected hierarchical filter unit, the full path or desired number of levels above the selected unit can be shown.

Example: Stockholm is selected in the hierarchical filter, either just “Stockholm” can be shown or “Total/Europe/Sweden/Stockholm” (example of full path) or Europe/Sweden/Stockholm”.

The setup is made in the same way as before, to show the full path or a certain part of the path use the new dropdown list shown in the image below.



Note: “/” is the default delimiter between each unit in the shown path (for example Sweden/Stockholm). If you want to use another character like space or – that can be changed in the project settings page as shown in the image below.



2.16 Updated layout of slide navigation

The slide navigation layout has been updated with a more modern look and feel. The image below shows the new layout.



2.17 Improved performance in PPT exports

The PPT download process has been optimized which will decrease the waiting time by up to 75%.

2.18 Custom code in PPT exports

A new function has been added which allows custom code to be applied to PPT exports. In previous versions, custom code could only be applied to the Online reports and not to PPT exports.

In the Project settings page, a new Custom HTML tab has been added which is applied to the PPT exports.

Note 1: The Online and PPT export custom code is not always identical. For more details and information, please contact the support team.

Note 2: Due to the nature of the export of tables to PPT, the custom code cannot be applied when exporting the objects 'Tables' and 'Cross tables' as native Power Point objects (i.e. it will only be applied to tables when those are exported as screenshots).

2.19 PPT export - turned off series now excluded

The PPT export has been improved. When the series is turned off online (in the charts) it is now also turned off in the PPT export. Previously, the PPT export showed every series, and did not consider if a series had been turned off or not.

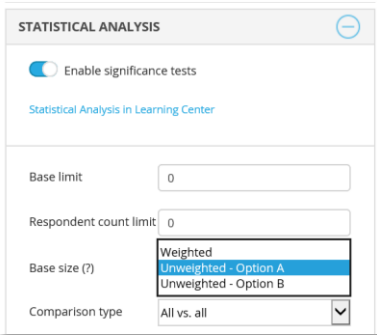
(Series can be turned off in the charts by clicking the desired series in the legend).

2.20 New base size options in significance test calculations

In the Storyteller charts and tables, it is possible to select if the base of the significance calculation should use a weighted or unweighted result. Due to high requests from our clients, a second unweighted base option has been added, which uses a slightly different formula (see details further

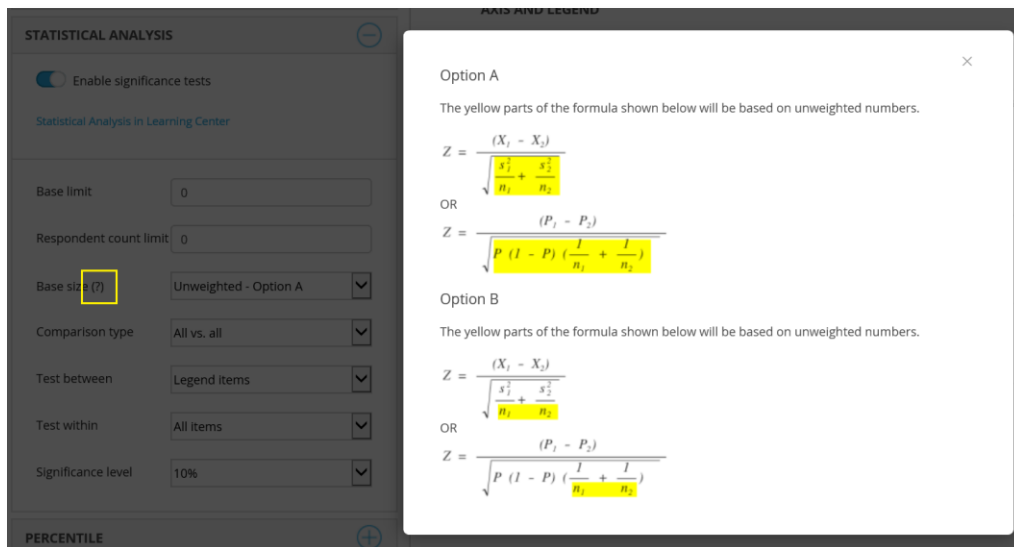
down). Now it is possible to choose between the following options when defining the base of the significance calculation:

- Weighted
- Unweighted - Option A (see details further down)
- Unweighted - Option B (see details further down)



Option B is the new option, and Option A uses the previous version of the unweighted base calculation. (All charts/tables that previously used the setting “Unweighted” are now using the setting “Unweighted – option A,” so they are using the same calculations as before).

To view the difference between the formulas in Option A and Option B, click the (?) icon shown in the image below, and the formulas will appear in a popup window.



2.21 Customizable units in tables

New support has been added in order to increase the layout and flexibility of units in Tables and Cross Tables. In the previous version, the unit “%” was always shown when a percentage calculation was used, and no unit was shown for a mean value or a numeric calculation. Now you can freely enter the unit in the tables.

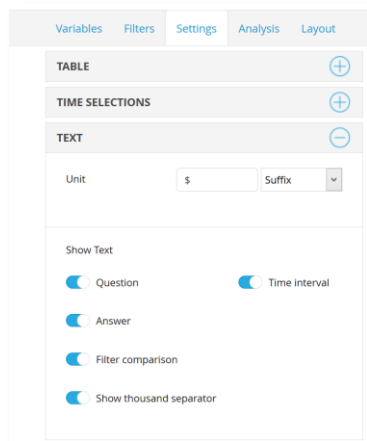
The image below shows a table with a “%” as a unit.

	Dapresy Telecom	Four	Swedish Telecom	Sweet Talk
Spontaneous brand awareness - Top of mind	30.5%	5.2%	6.6%	13.1%
Spontaneous brand awareness - In mind	90.0%	50.4%	50.3%	49.1%

Tables

The unit setup in the Table component is identical to the unit setup in the Chart component. In a text field, you can enter the unit you want to display and then define if it should be shown as a suffix or a prefix to the value.

The image below shows the setup of units in Tables. It is located in the Text panel of the Settings tab.



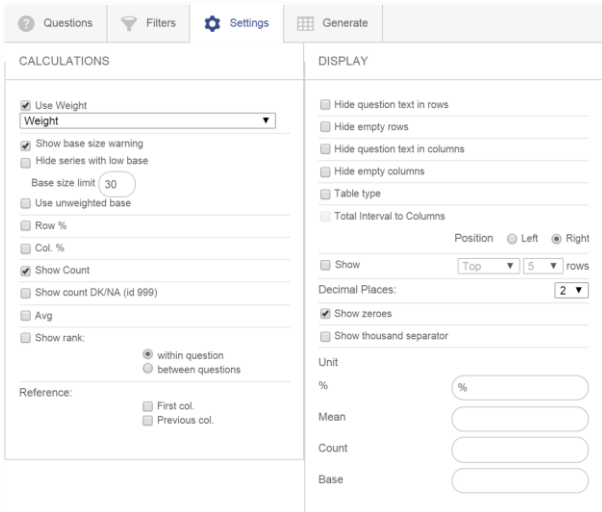
The image below shows a table with “\$” as suffix.

c1	639.6\$
c2	1 279.2\$
c3	1 918.8\$
c4	2 558.4\$

Cross Table tool

In the Cross Table tool, the unit settings have been added to the Settings tab. The default unit for percentage calculations is now “%.” There is no default unit for means and numeric calculations.

The image below shows the new text fields used to define the units in the Cross Tables. They are located in the lower right corner of the Settings tab.



3 Cross table tool

3.1 Significance test update - exclude sub group from total

In the Cross table tool, it is possible to exclude the sub groups result from the Total when running significance tests. The setting can only be used in the Cross table tool when the Interval “Total” is used.

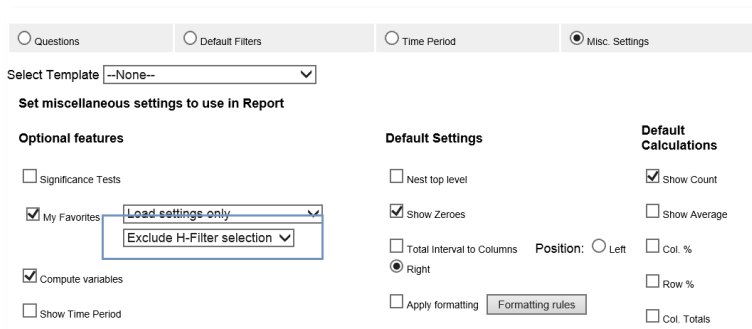
Previously, the sub group respondents were only excluded from the base size of the Total result in the significance test calculation. The actual % result of the Total was not recalculated.

To follow the market standards, the formula for “excluding the sub group from the total” has now been updated. The Total is now completely recalculated (both base size and result) when using the “Exclude from sub group.”

3.2 My Favorite Tables - save Hierarchical Filter selection

In the Cross table tool, you can add the ability to save tables as personal favorites by using the “My Favorites” feature. When a table is saved to My Favorites, all settings are saved (except the selected Hierarchical Filter unit selections). A new setting has been added that allows you to define the behavior of My Favorites. The Administrator can define if the Hierarchical Filter selections should be saved to My favorites or not.

The setting is made in the setup screen, as shown in the image below. The default setting is “Exclude H-Filter selection,” so it is the same logic that was previously used in the default behavior. By changing this to “Include H-Filter selection” the selected H-Filter units will also be saved as a part of the stored favorite table.



3.3 My Favorite Tables - loading behavior

When the Report Users loads a saved Favourite table the system loads all settings and generate the tables. In huge projects long loading time might appears as the saved Favourite table is generated automatically when the Favorite is loaded. To improve the usability, and give the user the ability to check settings before the table is generated, a new setting has been added which makes it possible to select behaviour of Favorite tables;

- Load settings and generate table
- Load settings only

The new setting is made on a report level in the Administration page “Setup reports”. (e.g. the report users cannot select behaviour, it is made by the Administrator during the setup)

4 Data administration

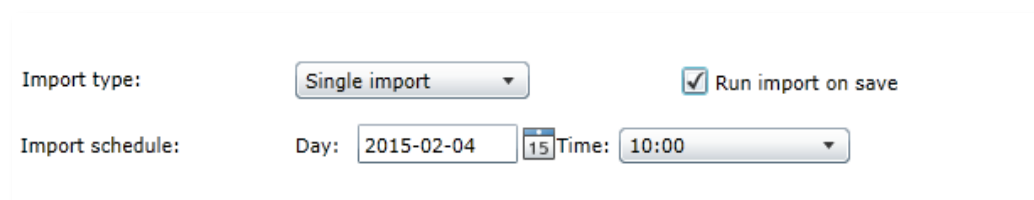
4.1 Triple-S data import: recode string variables to categorical variables

Previously, the SPSS, .SAV import, and the Excel import supported the ability to recode string variables to categorical variables. The same functionality has now been added to the import of Triple-S data files.

4.2 Import scheduler - "Run on save"

There is now a new option for 'triggering the data import on Save' on the scheduled data import page. This new option makes it easier to test the setup of the Import Scheduler, because you don't need to wait until a certain time to check if the setup has been correct or not.

To trigger the data import on save, check the option "Run import on save."



The screenshot shows the 'Import type' dropdown set to 'Single import'. To its right, the checkbox 'Run import on save' is checked. Below this, the 'Import schedule' section shows 'Day' as '2015-02-04' with a calendar icon, and 'Time' as '10:00' with a dropdown arrow.

4.3 Import scheduler - new setting to automatically delete data files

In the import scheduler page, a new setting has been added that makes it possible to automatically delete inactivated data files.

By using the new setting, all inactivated data files are deleted during the automated data uploads. The inactivated data files are deleted in the last step of the process.

Note: The data files are only deleted if the current import was successful. If it was unsuccessful, no data files are deleted.

Dapresy strongly advises you to delete the inactivated data files automatically, because the performance in the project can be negatively affected by having more data than needed stored in the project database. Specifically, the import and activation processes will take a lot longer if a huge amount of unused data is stored in the project.

The new setting is shown in the image below. If the check box is ticked, the inactivated data files will be deleted automatically.

Update to existing dataset(s): [Dropdown]

Data options:

<input type="checkbox"/> Import Metadata	<input type="checkbox"/> Inactivate excluded metadata
<input type="checkbox"/> Activate data	<input type="radio"/> Append dataset to active data
<input type="checkbox"/> Delete inactive data	<input type="radio"/> Activate latest 1 datasets <input type="checkbox"/> filter by selected tag

Report pre-generation:

<input type="checkbox"/> Generate reports	Select reports	<input type="checkbox"/> Use preload tables	<input type="checkbox"/> Prefetch tables
<input type="checkbox"/> Distribute reports			

4.3 Calculate Weight

New support has been added for calculating the weight values. By calculating the weight values in Dapresy Pro, you will streamline your processes when preparing the data for delivery.

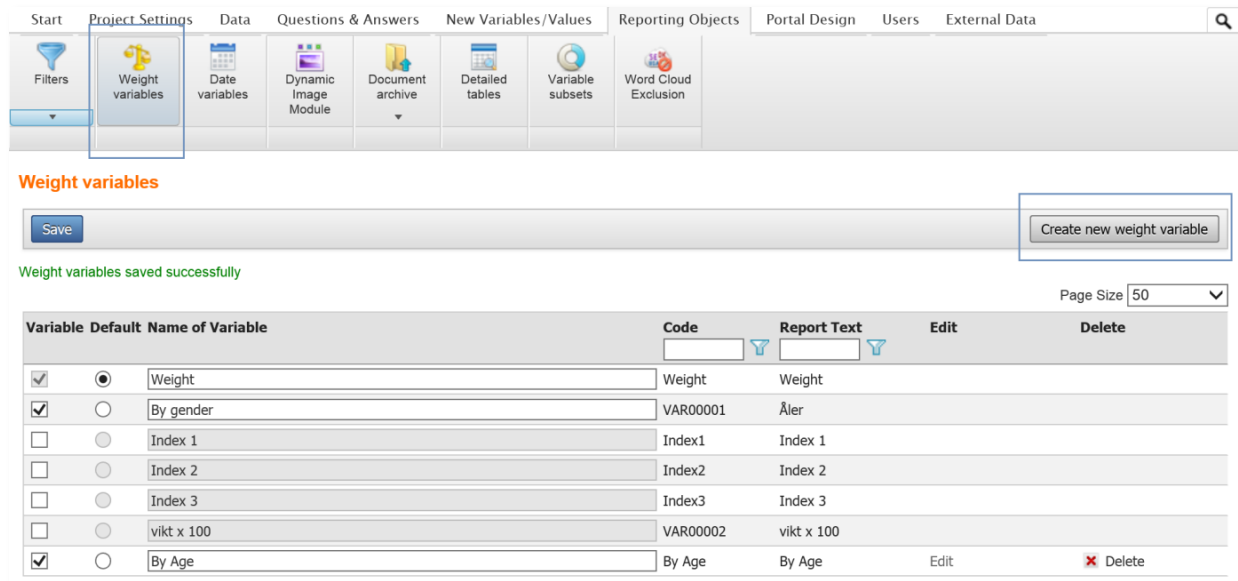
Here are some of the benefits of weight support:

- An unlimited number of weight variables can be created in a project
- A weight variable is based on one or more single-choice categorical questions, like gender and age groups. If multiple questions are selected, then the answer categories are nested
- The desired distribution can be freely defined for each group of respondents (e.g. male, female, etc.)
- The weight number per respondent is calculated automatically based on the defined distributions
- It is a one-time process. The weight variable is created once, and then the system calculates the weight each time new respondents are imported into the project
- You can define to calculate the base within different time periods, such as weeks or months, or you can base the calculation upon the full data set

4.3.1 Setup

The Weight variables are created in the existing screen “Weights,” as shown in the images below.

The image below shows the new button to click in order to create a new weight variable.



To create a new weight variable, click the button “Create new weight variable.” The Created weight variables are shown in the grid among all imported numeric/weight variables. To edit a Created weight variable, click the “Edit” column. To delete a variable, simply click “Delete.” The Delete and Edit buttons are only shown for the Created weight variables. The imported do not display Delete and Edit buttons.

4.3.1.1 Create new weight variable

To create a new weight variable, follow the instructions below:

1. Click “Create new weight variable” → a popup window appears
2. In the popup window, define the following:
 - a. Code and Report Text of the new variable
 - b. The interval to calculate the weight within (Full period, year, quarter, months, weeks, days)*
 - c. Which variable(s) to base the weight calculation on. Multiple variables can be selected here. The variable selection box lists all **single-choice** variables in the project (inclusive computed single choice variables).
 - d. Click “Load list of answer options”

- e. A new grid appears showing all ingoing answer alternatives. If multiple variables were selected in step C, then the answer alternatives are shown as nested. In this new grid, enter the defined distribution in the text fields, (use period (.) as decimal separator). A maximum of 10 decimals can be used. The system automatically suggests an even distribution value per answer alternative.

New weight variable

Code: Report Text: Weight within: ▼

Select variable(s)

- BgCurrentOp - Current operator
- BgSubscrType - Prepaid or Postpaid
- BgAgegroup - Age group
- BgGender - Gender
- BgIncome - Household Income
- BrAwaToM - Spontaneous brand awareness - Top of mind
- AdRecToM - Spontaneous advertising awareness - Top of mind
- Cons.1 - Brand Consideration - Dapresy Telecom
- Cons.2 - Brand Consideration - Four
- Cons.3 - Brand Consideration - Swedish Telecom
- Cons.4 - Brand Consideration - Sweet Talk
- Cons.5 - Brand Consideration - Telecom for You
- Cons.6 - Brand Consideration - Duty Calls

Man	<input style="width: 90%;" type="text" value="0.5"/>
Woman	<input style="width: 90%;" type="text" value="0.5"/>
Sum:	1

*Note: When selecting the time period, think of the update behavior in your project. If data is imported once a week, but the weight is based on the full period, historical values might be changed since the weight of the previously imported respondents will be changed based on the new data set. So if data is imported once a week, we suggest to weight within each week.

4.3.2 Calculation logic

Example 1

A Gender variable is selected to be the base in the weight calculation. The variable contains the answer options Male and Female. The following distribution is entered:

- Male: 0,51
- Female: 0,49

“Full period” is the selected time interval.

The imported data contains 900 respondents: 300 Female and 600 male respondents.

The weight number for each Male:

Since the male distribution is set to 0,51 it means that the weight of all male respondents should sum up to 51% of 900. The sum of all males should be $0,51 * 900 = 459$. The weight number of each Male respondent should be $459/600 = 0,765$.

The weight number for each Female:

Since the female distribution is set to 0,49 it means that the weight of all female respondents should sum up to 49% of 900. The sum of all females should be $0,49 * 900 = 441$. The weight number of each female respondent becomes $441/300 = 1,47$.

Example 2

A Gender variable is selected to be the base in the weight calculation. The variable contains the answer options Male and Female. The following distribution is entered:

- Male: 0,49
- Female: 0,51

“Month” is the selected time interval.

The imported data contains:

- 900 respondents (300 Female and 600 male respondents) **in January**
- 420 respondents (200 Females and 220 males) **in February.**

Calculation for January respondents

Weight number of each **female** respondent

$$(300 * X = (300+600) * 0,51) \rightarrow X 1,53$$

Weight number of each **male** respondent

$$(600 * X = (300+600) * 0,49) \rightarrow X 0,735$$

(X= the weight value per respondent)

Calculation for February respondents

Weight number of each **female** respondent:

$$(200 * X = (200+220) * 0,51) \rightarrow X 1.071$$

Weight number of each **male** respondent

$$(220 * X = (200+220)*0,49) \rightarrow X 0,9354545455$$

(X= the weight value per respondent)

Example 3

A Gender variable is selected to be the base in the weight calculation. The variable contains the answer options Male and Female. The following distribution is entered:

- Male: 0,51
- Female: 0,49

“Full period” is the selected time interval.

The imported data contains 910 respondents: 300 Female and 600 male respondents. 10 respondents have no Gender markup.

Calculation

Weight number of each **female** respondent:

$$(300 * X = (300+600) * 0,51) \rightarrow X 1.53$$

Weight number of each **Male** respondent:

$$(600 * X = (300+600) * 0,49) \rightarrow X 0,735$$

Weight number for the respondents without Gender mark up = 1*

*The system always sets the weight number to 1 in the calculations if the weight is empty.

5 Result based Event server

The Event server has been improved, now it does also support Result based Events and not only Respondent level Events. By using the new result based options the Event server can be used to warn when for example a NPS value drops below a defined threshold in an ongoing customer satisfaction survey or if the result of any other main KPIs goes outside the defined ranges.

So with the added Event server improvement two types of Events exist in Dapresy Pro:

Events based on Respondent level: the thresholds are defined on a respondent level. E.g. if an answer on a questions is below/above a certain value the Event is triggered and an email sent out.

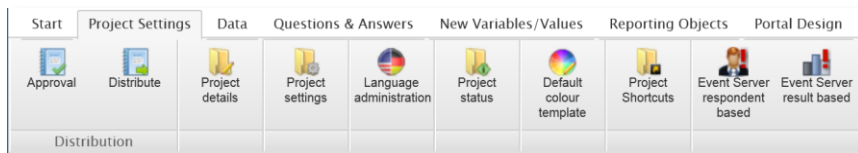
Events based on results: the thresholds are defined on an aggregated level. E.g. if the % (or mean value) result of answer is below/above a certain value the Event is triggered and an email sent out.

The following chapters explain how to use the Result based Events.

5.1 Setup

The setup of the Result based Events is very similar to the Respondent based Event server. The setup page is found to the most right in the “Project settings” page.

Note: Only user with license to use the Enfesys modules has access right to this page. For more information or prices contact your account manager.



The following steps are made during the setup of the Events:

- 1) An email template is created: which information should be included in the email that is sent out when the result goes outside the defined threshold values?
- 2) Conditions: the thresholds, what should they be based on? % or Means? Which variables, any filters? Any specific time period like last week or the full period?
- 3) The Event itself which is based on an Email template, one or multiple conditions and a list of recipients.

This is the first version supporting the most basic features for sending out Event emails based on thresholds. No automatic function for creating conditions based on for example the Hierarchical filter structure exist. In cases where a threshold should be used to warn if any node in the Hierarchical Filter

structure goes below the thresholds one condition and one Event needs to be created per Hierarchical Filter unit, take that into consideration when estimating the setup time needed!

5.1.1 Setup Email templates

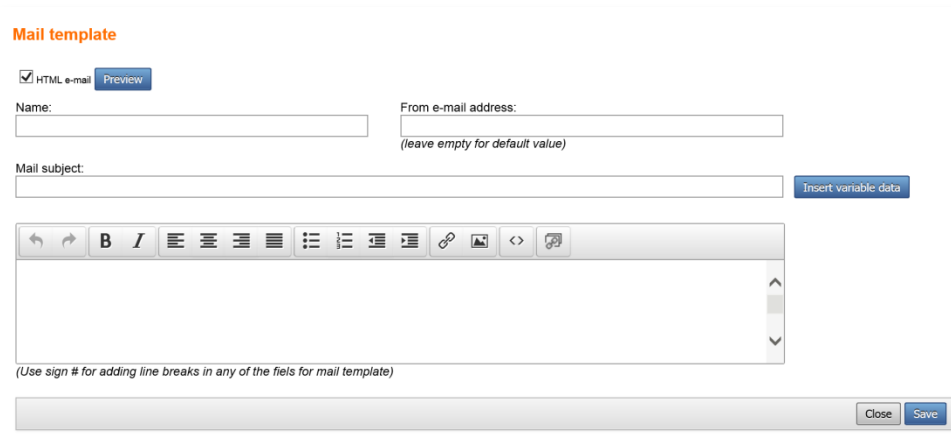
The email templates can consist of plain text, images and links to the portal. The link contains the username and password so the receiver of the Event email does not need to manually login to the portal to view the result, it is enough to click the link to be logged in automatically.

To create a new email template click the “New template” button in top left corner of the Mail template tab and a popup image appears, see the images below.

The image below shows the list of Email templates, click “New template” to create a new one.



The image below shows the popup image for defining the email template content.



The following steps are made during the setup of the email template.

Name: Add a name, preferably a name explaining the content of the email template

From email address: this is the email address the receiver of the email will see in his/her mail program. If it is leaved empty a Dapresy address will be used.

Mail subject: the mail subject of the email

Body: the text to include in the email. As shown in the image below the text can be styled, if any specific needs are required the “Source code” option can be used to enter the email in HTML mode.

Insert direct link: click the option “Insert direct link” and select which report the link should go to. In the popup window the text of the link can be defined as well.

5.1.2 Setup of Conditions

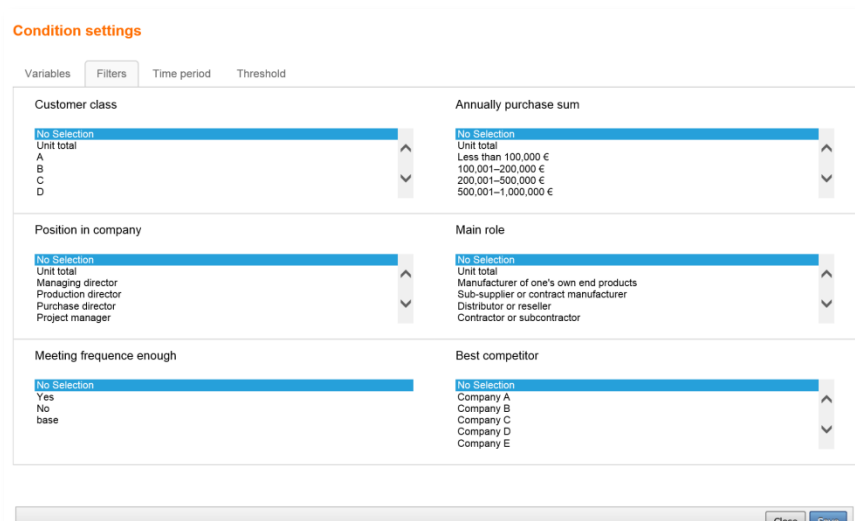
The setup of the Conditions is similar to the setup of up of a chart as options such as time period, filter, calculation type etc. needs to be defined.

To create a new Condition click the “New condition” button in top left corner of the Condition tab and a popup image appears, see the images below.

The image below shows the list of Conditions, click “New condition” to create a new one.



The image below shows the popup image for defining the conditions, the page is split up in multiple tabs.



Variable tab: select which calculation type to use. The calculation types shown in the list reflects the variables in the projects so only relevant types are shown. When the calculation type has been selected the desired variable is pointed out.

Filter tab: The filter tab shows all filters in the projects, select the filters to be applied to the definition.

Time period tab: select the time period to use in the calculation.

The threshold tab: The Threshold value is defined with a single expression like for example “<75” which means that the Event will be triggered if the result goes below 75. In the cases where a range should be used this is done by creating two conditions which both then are applied to the Event. As if multiple conditions are used in one Event all conditions must be fulfilled.

5.1.3 Setup of Event

The Event setup is made in the first tab in the Event Server Result based page.

The image below shows the list of Events, click “New condition” to create a new one.



When defining the content and behavior of an Event the following is defined:

Name: The name of the Event. It will not be shown in any email it is only for internal use to mark up all created Events.

Event schedule: define when the Event should be triggered. Should it be triggered by data activation or in a certain time schedule? If it should be triggered every time new data is activated select “during data activation” in the list Event schedule. If it should be scheduled to a certain time select between the following types:

- Weekly: 1 -7 days a week can be selected. A time is also defined.
- Monthly: 1 day per month is selected. A time is also defined.
- Hourly: select if it should run every 1,2 3 hours etc.

Active: Select if the Event should be Active or not. Only Active Events are being evaluated.

Conditions and Filters: Select at least 1 condition to be used when the Event is evaluated. If multiple conditions or filters are selected all must be fulfilled to trigger the Event.

To add a condition/Filter to the Event click the Add/remove condition filter button and a new popup window appears where the conditions/filters are added/removed.

Note: it is not any difference between a condition and a filter, they will behave the same. They can be used to split up the conditions in two boxes to get a better overview if multiple conditions are used.

Email template: Select which email template to use.

Recipients: define who should receive the Event email. It can be users in the project or external email addresses.

To add a recipient click the Edit recipients button and a new popup window appears where the recipients are added/removed.

5.1.4 History tab

The History tab shows the Events that have been triggered in the project. The list shows the most recent Events in the top and the oldest once in the bottom. Use the search fields for finding a specific Event or a date when the list becomes long.

Note: if an Event is deleted from the project it is also deleted from the History page.



Event name	Date sent
NPS Sweden	2015-03-10 11:02

6 General Event server updates

6.1 Improved scheduler

When creating an Event schedule it was previously possible to use hours only (11:00, 12:00, 13:00 etc.), the logic has been improved to also support quarters so now it is possible to set the time on a 15 minutes level (12:00, 12:15, 12:30 etc.)

6.2 Direct links in Event emails

The setup of the Direct links in the Event email templates have been improved. The new interface is more user-friendly and new logic makes it possible to select to which Form the link should go to if the Storyteller contains links to multiple Forms (previously the first Form was opened automatically if the link pointed to a Storyteller slide with multiple Forms).

The image below shows the interface for defining the Direct links. If selecting a Storyteller report (in the Target report list) and a slide (in the Target slide list) containing a Form you can decide if the form should be opened automatically or not by ticking the check box “Open Form Automatically”. This is the same functionality as before, only the interface has been changed.

If selecting a slide which contains Respondent tables with links to Form reports you can now select which form that should be opened automatically, see the second image below.

The image below shows a link going to slide 1 in the Overview report, as “Open Form automatically” is not ticked the link goes to the slide only, no Form is opened automatically.



Add direct link

Target report: Overview

Target slide: Slide 1

Open Form automatically

Link text (optional):

Cancel Insert

Image 2, the “Open Form automatically” is ticked so now it is possible to select which Form that should be opened up automatically (all Forms connected to any Respondent Table in slide 1 is shown in the selection list).

Add direct link

Target report:

Target slide:

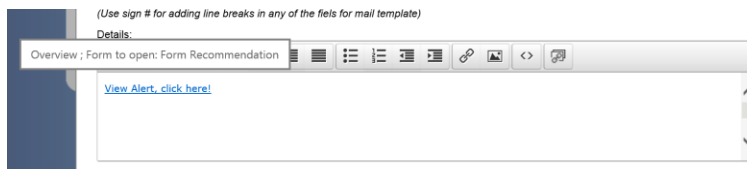
Open Form automatically

Form:

Link text (optional):

Note: The direct links pointing to a Storyteller can only open a Form if the link is inserted in the “Details” section of the email template. If the link is inserted in the “Header” or “Footer” it can only go to a certain slide as those sections do not contain any respondent information.

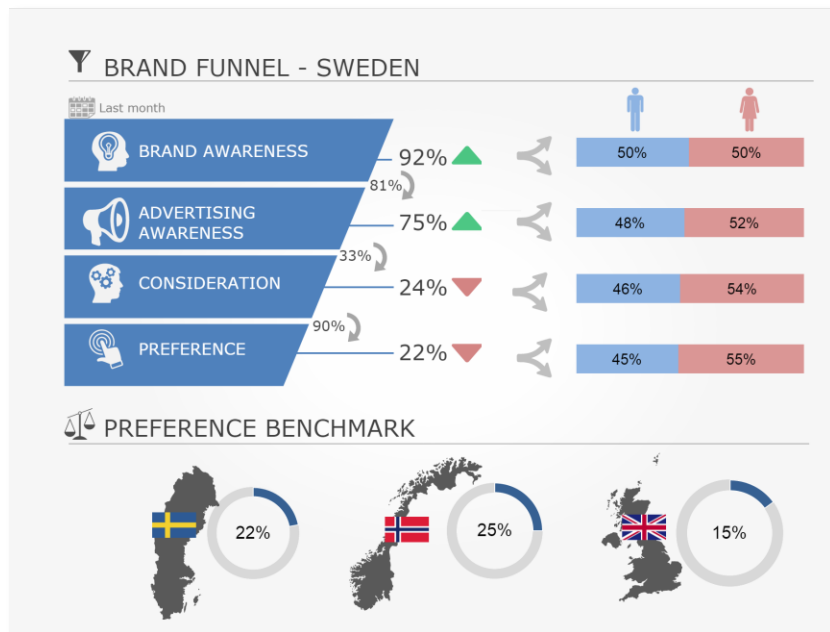
Another minor improvement, after a Direct link has been inserted it is now possible to see the target Report when hovering over the link as shown in the image below.



7 Icons & Shapes Library

A new object type has been added to Dapresy so that you can add new icons and shapes to your Storyteller and Form reports. The main purpose of this new object is so that you can create professional and dynamically designed dashboards without having to create icons and images outside of Dapresy Pro.

The image below was created by only using images from the Icons & Shapes Library.



The Icon & Shape library contains editable objects, which means that the color, size, rotation etc. can be adjusted to suit your needs and match your company's graphical profile. Since the icons and shapes are vectored graphics (SVG format), they can be resized without getting blurry or distorted.

The library contains over 1,000 objects (as shown in the list below), and it will be continuously updated!

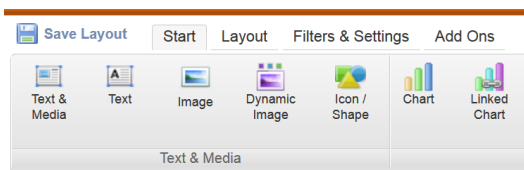
- Over 900 icons
- Flags for more than 250 countries
- Over 60 maps, including maps of all continents and the most common countries
- Over 40 elements
- Shapes such as squares, circles, lines, etc.



7.1 Setup

The setup of the icon/shapes works just like other objects. You can simply drag and drop them in, and the definitions are made in the setup window. The Icon & Shape Library can be found in both the Storyteller and the Form report.

The image below shows the Icon/Shape Library object in the ribbon menu.



The setup window is divided into two tabs:

- Library tab for selecting icon/shape
- Layout tab for styling the object

In the Library tab, you can select the icon, shape, flag etc. and in the Layout tab you can define the color, rotation, etc.

7.1.1 Library tab

In the Library tab, you select which icon/shape you would like to use.

The objects have been divided into six groups based on their behavior and type:

- Icons
- Shapes
- Blocks

- Symbols
- Maps
- Flags

The Shapes have more settings than the other groups, and their behavior is a bit different. A shape can be stretched, while the other objects always retain the same ratio. A shape has both a border and a background color while icons, blocks, symbols and maps only have a single color. The multi-color flags have no color options at all.

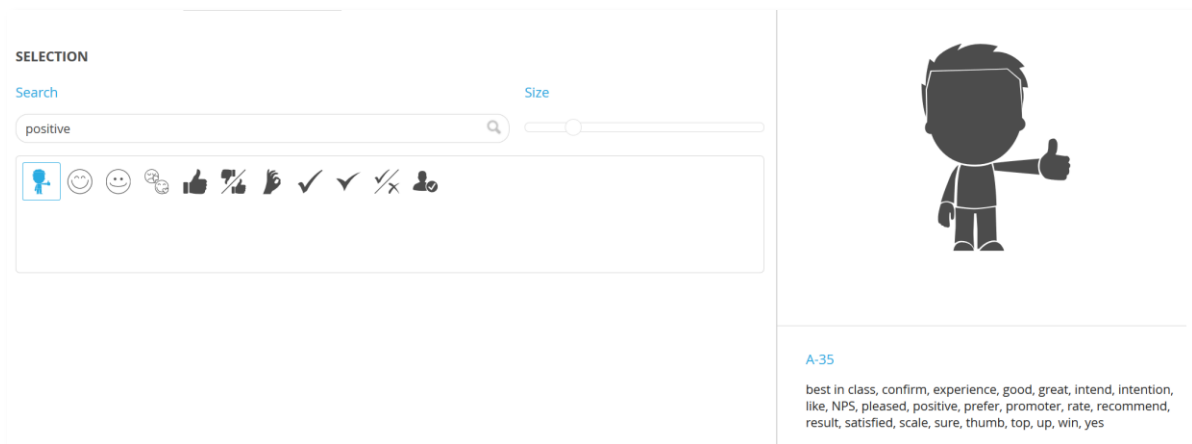
The image below shows the selection of Icons and Shapes as well as the sub categories within Icons.



To select an object, simply click on it in the icon list.

Each Icon has multiple tags so it's easy to search for relevant icons. As shown below, the user searched for "positive." All icons that match "positive" are shown in the icon list. When selecting an icon, all the tags are also shown just below the icon. To simplify your search, the letter "S" will be ignored if it is at the end of the search word. For example, if you search the word "arrows," it will find the tag "arrow."

The image below shows an example of an icon search.



You can also scroll in the list to find a suitable icon. Use the “size” setting to select the preview size of the icon in the icon list.

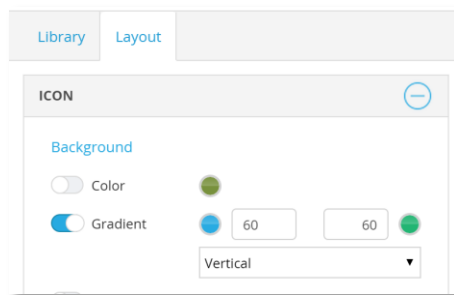
7.1.2 Layout tab

The Layout tab is used to define the layout of the selected icon or shape. The shapes have a few more settings than the icons, since a shape supports a border color and a background color, whereas icons only support a single color.

The settings are described below.

Color

Either a two-color gradient or a solid color can be used. When using a gradient, you will need to define two colors and the threshold values.



The thumbs example below shows some of the coloring possibilities of an icon. The farthest left is using a solid color, and the other three are using the gradient coloring.



Opacity

The opacity option should be used when an icon/shape should be transparent. An opacity value of 100 is a solid color, a value of 50 is a half transparent color, and so on.

The image below has a 50 opacity value on the thumb.



Flip

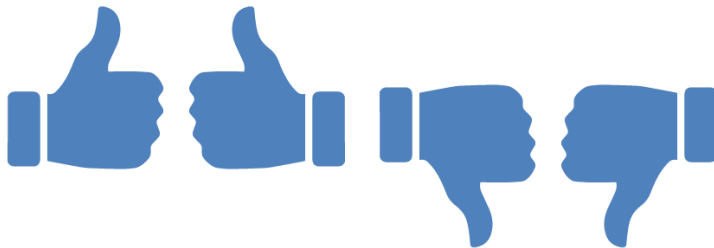
All icons and shapes can be flipped. By flipping a “thumbs up” icon vertically it will be a “thumbs down” icon. As shown below, the icons and shapes can be flipped vertically and/or horizontally.

Transform

Flip Horizontal Vertical

Rotate

The first thumb is the original icon, and the second is flipped horizontally. The third thumb is flipped vertically, and the fourth is flipped both horizontally and vertically.



Rotate

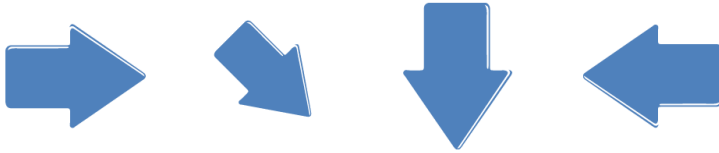
Rotate is used to rotate icons and shapes such as arrows. Enter the degree of rotation in the input field shown below.

Transform

Flip Horizontal Vertical

Rotate

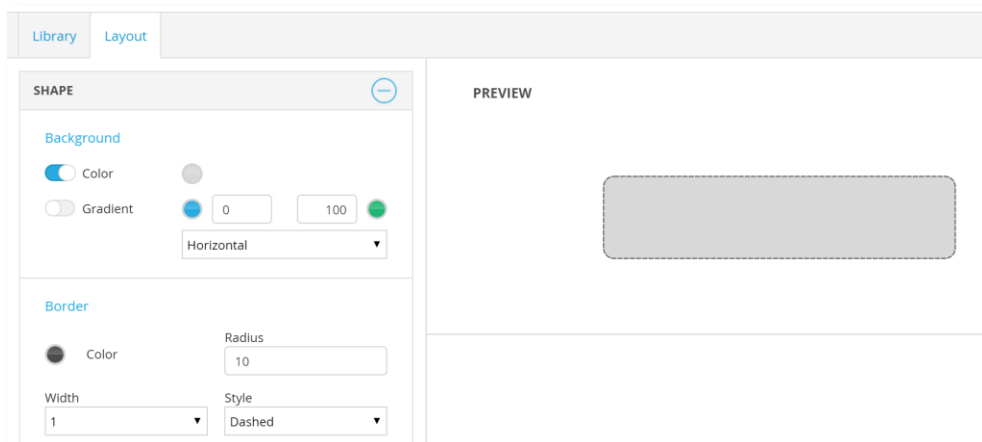
The first arrow is the original icon, and the second is rotated 45°. The third arrow is rotated 90°, and the fourth one is rotated 180°.



Borders (only available in shapes)

Borders can be used in all kinds of shapes. The border color, width and style can be selected, as shown in the image below.

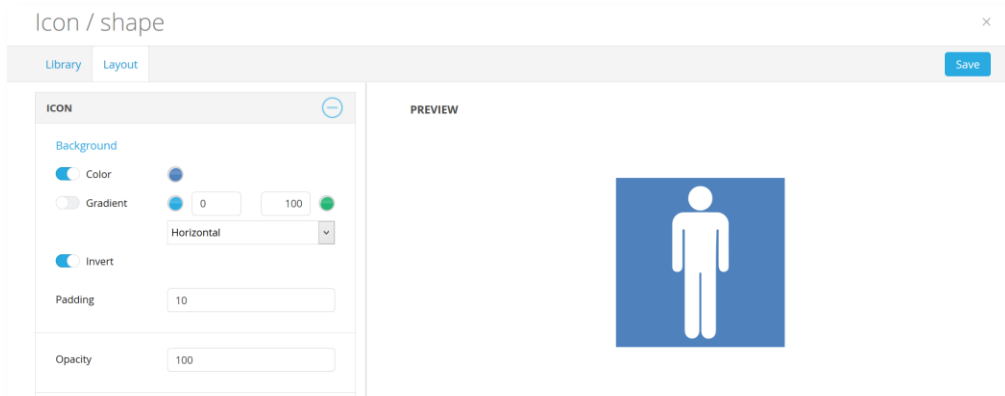
The image below shows the border settings of a shape.



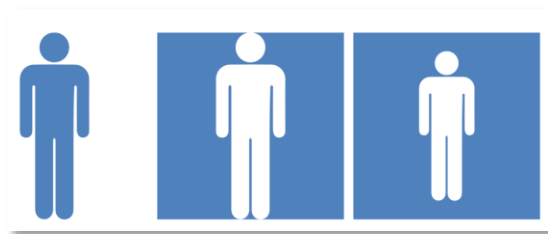
Invert and padding

The “Invert” and “Padding” options are often used together. The invert function simply inverts the colors. Choose the background color, and the icon stays transparent. By adding padding, you can define the distance between the icon and the border.

The image below shows the Invert and Padding settings.

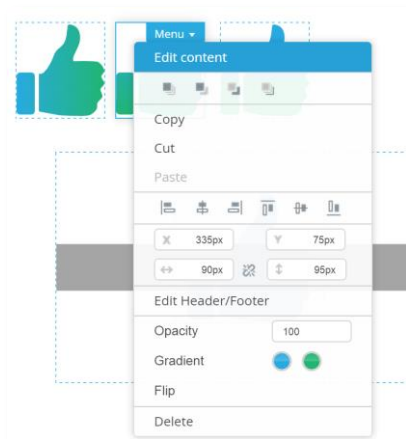


The first person below is the original icon. The second one has been inverted. The third one has been inverted, and padding has also been added.



7.1.3 Context menu

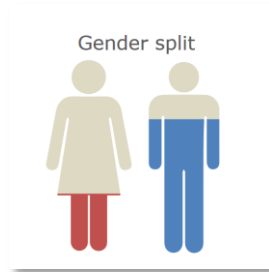
To increase usability, several layout options have been added to the context menu, as shown in the image below. These can be used for changing color, opacity, etc.



7.2 How to partially fill icons based on results!

By using the invert and padding settings on icons, you can create unique-looking InfoGraphic objects that are partially filled based on results.

The image below shows an example of icons that are filled based on results.

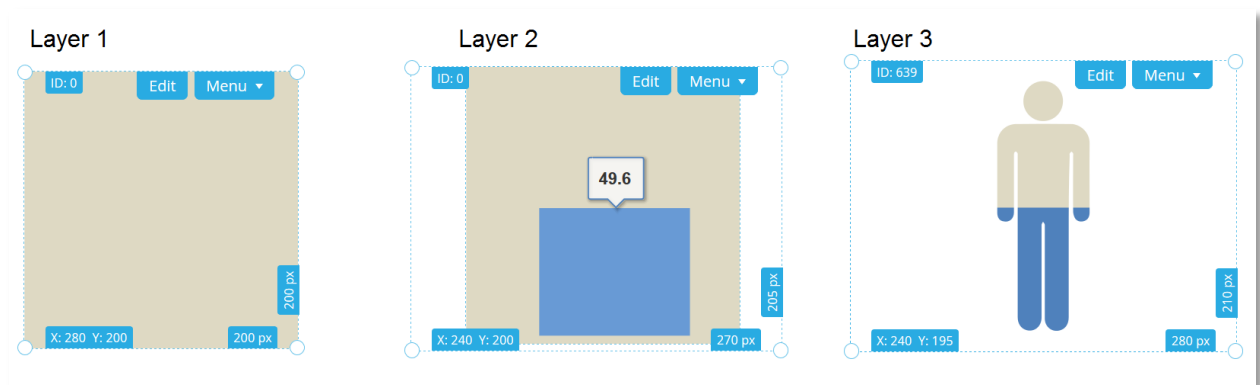


To create the above InfoGraphics, use a three-layer logic, as shown in the image below.

First, add a solid colored shape in the background. On top of this shape, add a column chart. Lastly, add an inverted icon on top of the column chart.

The icon should be padded and be the same color as the background of the slide. Don't forget to set a max scale in the chart so that a full colored icon represents the top result!

The images below show the 3 layers necessary to set up a partially filled icon.



7.3 NOTE: Browser information

Users using IE8 (or below) will not be able to see the icons and shapes since these old browsers do not support vector-based graphics. Internet Explorer 9 (or greater), Firefox, Safari, Chrome do support SVG format.

(IE8 was released in 2009 and will not longer be supported by Microsoft by the end of this year)

A notification will appear if a user uses IE8 (or below) if the current report contains an icon/shape.