DAPRESY PRO 8.2

TECHNICAL RELEASE NOTES

June 2013

Index

1 INTRODUCTION

This document describes new and improved features in Dapresy Pro version 8.2.

- Chapter 2 describes Storyteller reporting improvements
- Chapter 3 describes Cross table tool improvement
- Chapter 4 describes Data import improvements
- Chapter 5 describes the new Event Server module
- Chapter 6 describes general administration improvements

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 2013

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2 STORYTELLER REPORTING IMPROVEMENTS

2.1 GAUGES

The chart type Gauge (speedometer) is now supported in the Storyteller reporting module. It is great to use for visualizing key values such as KPI indicators.

The image below shows an example of a Gauge chart. The red and green target areas are also a new feature, see next chapter for more details.
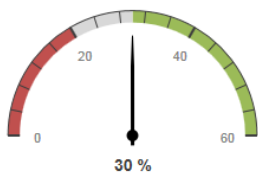

2.1.1 SETUP

The setup logic of the Gauge chart is the same as for the other charts except for a few differences.

The Axis/Legend settings are not shown when the Gauge chart is selected. All the items are placed in Legend automatically as that is the only possible option in a Gauge chart.

The form of the Gauge, the angle, can be defined in the Layout tab. The default value is -90 to 90 degrees but those can be changed, see examples of some Gauges with different formats below.

The images below shows example of a few different Gauge formats. The top left Gauge shows -90 to 90, the top right shows -170 to 170, the bottom left shows -45 to 45 and the bottom right shows 200 to 340.
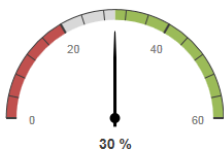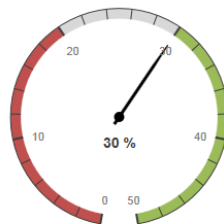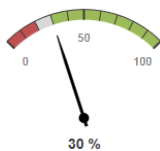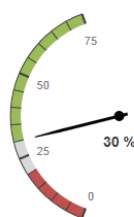
Note: The "Show value" function should only be used when displaying one value in the chart, as soon as multiple values are shown the layout of the data labels look bad as they are printed on top of each other.

2.2 TARGET AREAS

Support for adding Target Areas to the charts has been added. The Target Areas are shown as distinct lines or as solid bands in the background of the chart like in the example images below. It can be used in all chart types except for pie, donut, scatter and bubble charts. Any number of Target Areas can be added to a chart.
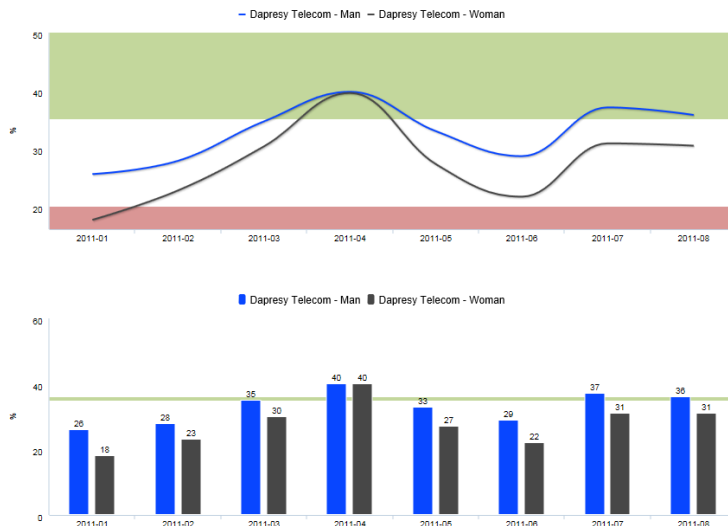
The first chart in the image below shows two target areas and the second chart shows one target area.

2.2.1 SETUP

The setup of the Target Areas is made in the Settings tab in the chart setup interface as shown in the image below. To add a Target Area click "Add" and define the ranges and the color, to delete a Target Area click "Delete".

 To add a distinct line like in the column chart in the image above define a small range like 35-36 if the line should be at shown at the value 35.
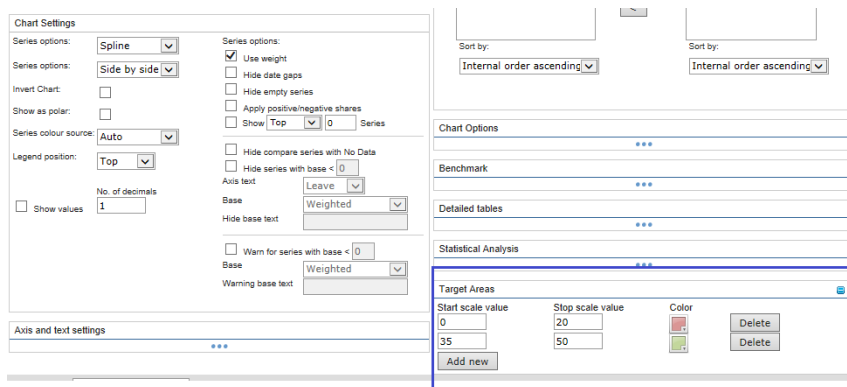
2.3 DYNAMIC TEXTS (USED FOR VISUALIZE OPTIONAL FILTER SELECTIONS)

In the Storyteller the Report User can select Optional Filters such as different filters, hierarchical filters, time periods, variable subsets etc. In the new version it is now possible to add information to the slide about which selections that have been made. As the information is shown on the slide it is also included in Power Point exports.

The solution is flexible and the Administrator defines what should be shown and also the text size, format etc.

The example image below shows the selected Time period and Filters, the Interval selection is not shown.
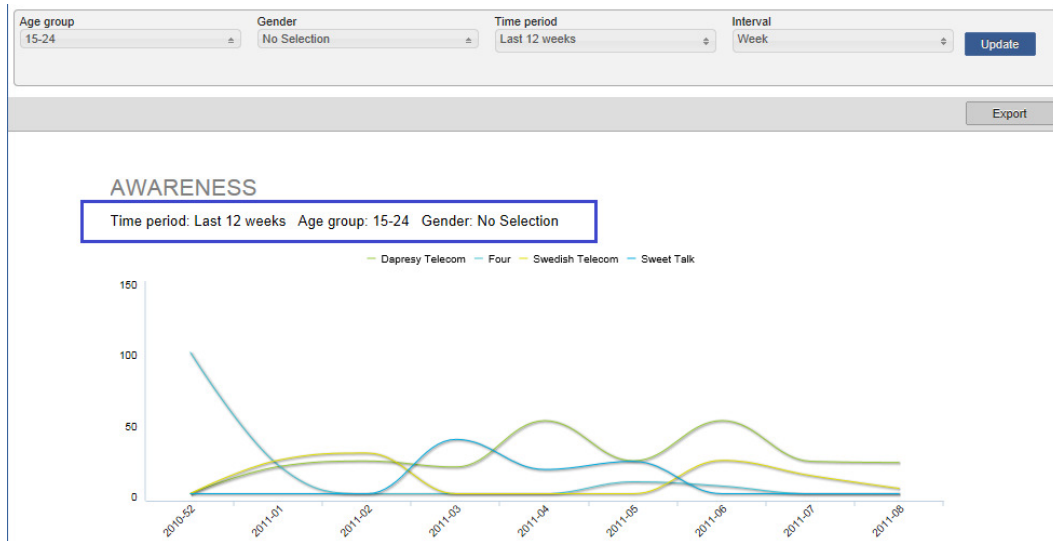
2.3.1 SETUP

The Dynamic Texts is a function in the regular Text object. To add Dynamic Texts click the icon shown in the first image below. In the pop-up window (second image below) select which information that should be shown. As shown both the label of the selected filter and the selected option can be shown (e.g. Gender: Male) or only the selected options (e.g. "Male").

The image below shows the button to click to insert dynamic texts.
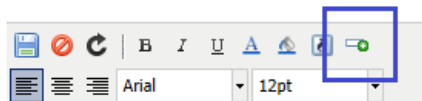
The image below shows the popup window where the Administrator selects which Optional Filter information that should be added.

In Hierarchical Filter projects two options appears for showing the name of the selected unit, either can the name of the selected unit be shown (e.g. "Stockholm") or the path in the hierarchical structure (e.g. "Europe/Sweden/Stockholm").

To format the Dynamic Texts use the regular text format options.

Tip: the popup window must not be used for adding the placeholders for the Dynamic Text, they can be added manually directly in the Text box. The names of placeholders are shown in the setup as shown in the image below.

The image shows the names of the place holders for the dynamic text. As shown [TP] means Time period, [VS] means Variable subset and so on. The placeholders for Filters are named by their Question ID. To add the Label use [TP:L] and to add the selected option add [TP:O].

2.4 IMPROVED PRE-GENERATION TIME

The calculation time in the Storyteller charts and tables (not Cross tables) has been improved up to 50%. Most effect is noticed in projects with many Hierarchical Filter units and a big amount of data.

3 CROSS TABLE TOOL IMPROVEMENTS

3.1 NEW LAYOUT IN COMPUTE VARIABLE MODE

The layout in the Compute Variable screen inside the Cross table tool, used by the Report Users, has been updated. The layout and workflow is now the same as in the Administration pages.

The image below shows where to find the Compute Variable mode in the Cross Table tool.
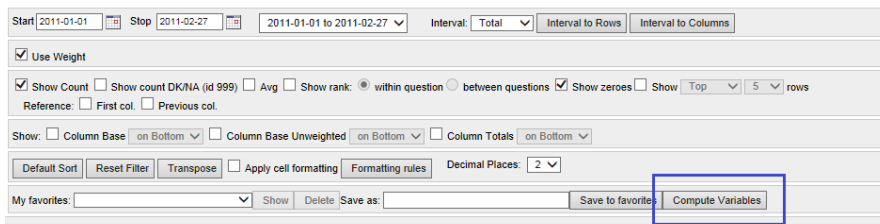
The images below show the new layout of the Compute variable view. Image 1 and 2 shows the layout for creating new Computed variables and image 3 shows the layout for view/delete/edit already created variables.

Image 1, shows the "Define Answer" tab which is used for creating Computed variables.
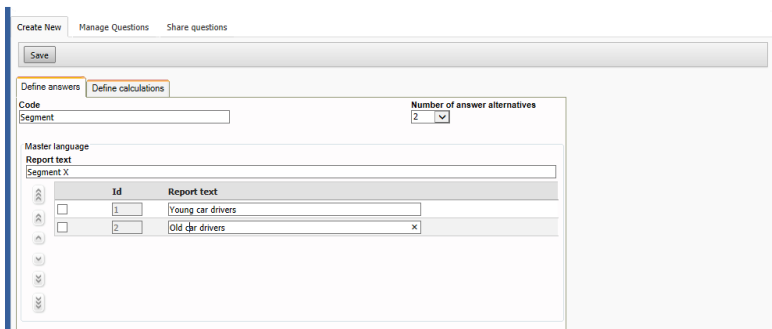
Image 2, shows the "Define calculation" tab which is used for creating Computed variables. You can search for variables by selecting the variable list and enter the search criteria.
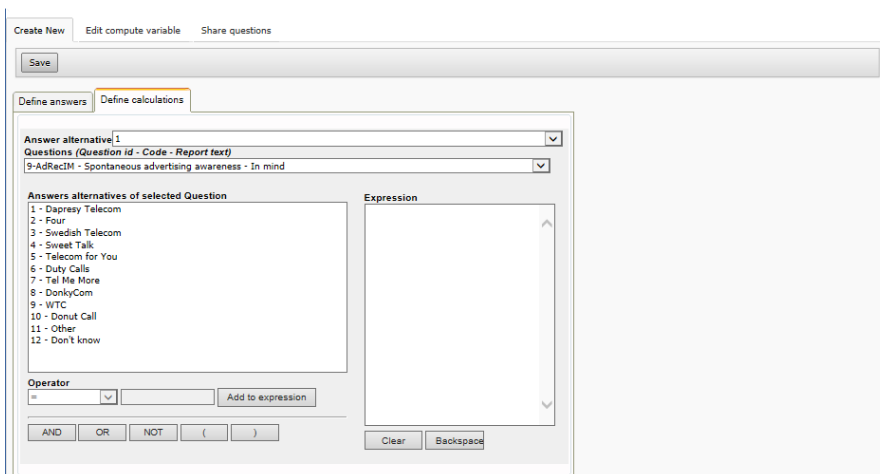
Image 3, shows the Manage question tab.
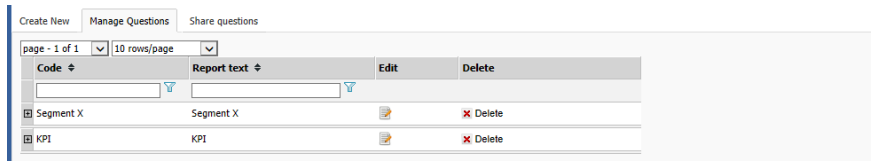
3.2 SUPPORT FOR LIMITING VARIABLES IN COMPUTE VARIABLE MODE

In the previous version the Report users got access rights to all variables in the Compute Variable view inside the Cross table tool, support has now been added for limiting the variables which the Report Users can use. It can be used for increasing the usability or to remove variables they should be able to use.

3.2.1 SETUP

As default all the variables are in included in the Compute variable screen so the default behavior is the same as in the previous version. If the variable list should be limited the settings are performed in the Setup tab content page as shown in the image below.

The image below shows the new controls for limiting the content in the Compute variable screen shown for the Report Users. If a variable is checked it will be shown for the report user, if it is un-checked it will not be shown.
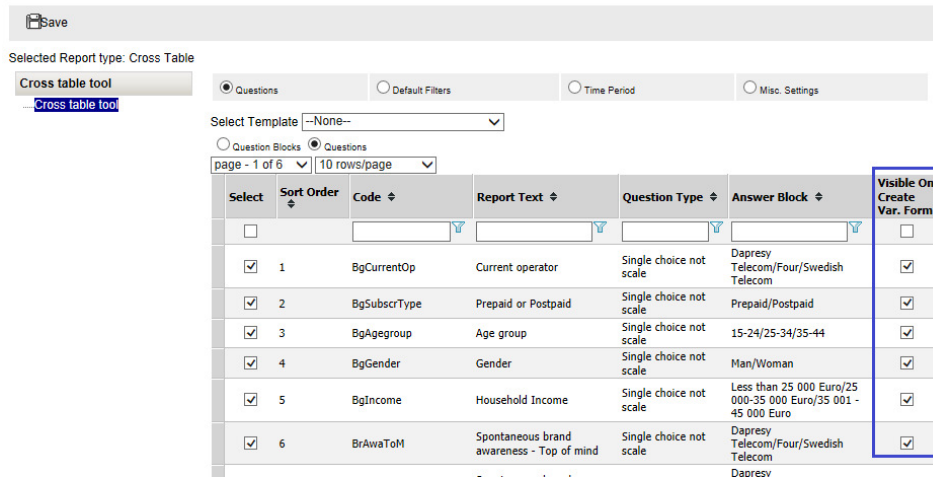
3.3 IMPROVED VARIABLE SEARCH

Note; this feature will be available within a week after the release.

The variable search has been improved in the Cross table tool, in the previous version it could only be used when the variables where listed in a flat list and not be used when the variables where grouped into Question blocks. The variable search can now be used in both cases.

4 DATA IMPORT IMPROVEMENTS

4.1 EXCEL/CSV SUPPORT

Excel and CSV files are now supported as valid formats in the data import, the following formats are now accepted:

- SPSS .SAV
- Triple-S
- Excel (XLS and XLSX)
- CSV

The Excel/CSV support is mainly developed for reporting external data such as media investments, social media data, sales figures etc. Regular survey data can also be imported by using the new Excel format but it requires more manual work compared to the SPSS .SAV for handling the meta data labels. SPSS .SAV is the recommended format for importing survey data into Dapresy Pro.

A project can have a mix of data sources so survey data can be imported in SPSS .SAV format and external data in several different Excel files.

4.1.1 FILE FORMAT
Excel/CSV is a very wide format and data can be stored in many different ways, the files to import to Dapresy Pro must follow the format guidelines below:

- o Only one sheet in the data file will be considered during the import
- o Variables should be placed in columns and cases (respondents) in rows.
- o The variables (each column) should have a code/ identification name.
- o If each case has a specific date (response date) it should be included in the file as a date, it cannot be extracted from a week number etc.
- o The standard variables (Respondent id, Response date and Weight) are required*

*The Meta data transformation service can be used during the data import which means that these variables can be missing in the data file and added manually during the import.

4.1.2 VARIABLE TYPES
All variable types can be used when using Excel/CSV data but all variables will either be Numeric or String automatically. If the file contains categorical questions the Meta data transformation service must be used to recode Numeric/String variables into Categorical variables in the first data import, for details see chapter 4.2.
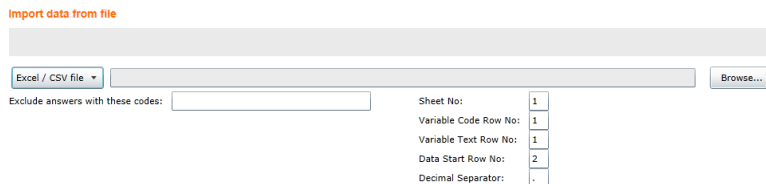
4.1.3 IMPORT
To import an Excel/CSV file use the existing Data Import screen. When selecting Excel/CSV as the file option the following settings need to be done:

1. Define which sheet to be used (the file can contain multiple sheets but only one will be processed).
2. Define in which row the Variable code is found.

3. Define in which row the Variable text (question text) is found. If the variable label is not included the variable text will be the same as the variable code.
4. Define the first data row in the file.
5. Define if . (point) or , (comma) is used as decimal separator in the numeric variables.

The image below shows the interface for importing Excel/CSV data.

The data activation of imported Excel/CSV files is done in the same way as when importing a SPSS .SAV or a Triple-S file.

4.2 SUPPORT FOR RECODING STRING/NUMERIC INTO CATEGORICAL VARIABLES

Note; this feature is supported when uploading Excel/CSV files, it will be available to use when uploading SPSS.SAV and Triple-S files within a week after the release.

New support in the Meta data transformation service makes it possible to recode Numeric/String variables into Categorical variables. The new function will save time as manual created syntaxes can be avoided in projects using SPSS. SAV files.

If data is imported thru the Excel/CSV format this function can be used to create Categorical variables from String or Numeric variables.

4.2.1 RECODING LOGIC

The recoding is completely automatic and all distinct options in the String/Numeric variable will be recoded to a categorical answer option. This means that the recoding function is great to use in cases where the variables have a fixed list of options. It is not meant to be used where a fixed list is not present (e.g. recoding top of mind brands in a brand study as that needs a more dynamic recoding logic).

Example: In the example below the string questions Q_Region and Q1 is being recoded into a Categorical question. The first image below shows data and the second image shows the answer blocks that will be created during the recoding.

The image below shows the imported data.

Respondent ID	Q_REGION	Q1
1	Region A	5 Very good
2	Region B	3
3	Region X	5 Very good
4	Region Z	4
5	Region Z	2
6	Region B	3
7	Region X	1 Very bad
8	Region Z	1 Very bad
9	Region A	5 Very good
10	Region B	4

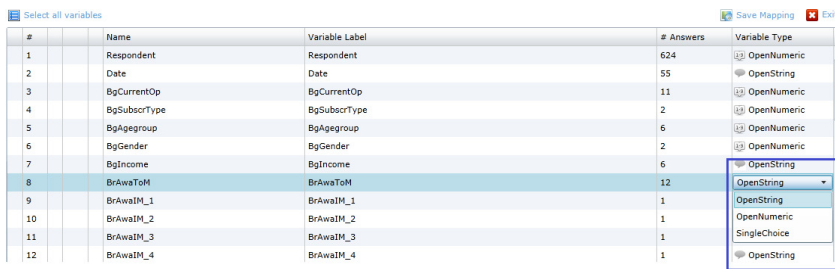*The image below shows the answer block that will be created during the recoding.*

Q_REGION		Q1
Region A		1 Very bad
Region B		2
Region X		3
Region Z		4
		5 Very good

4.2.1 SETUP

To recode a variable into a categorical variable the Meta data transformation is used. This means that the recoding must be done the first time the variable is being imported as it is not supported to change variable type afterwards.
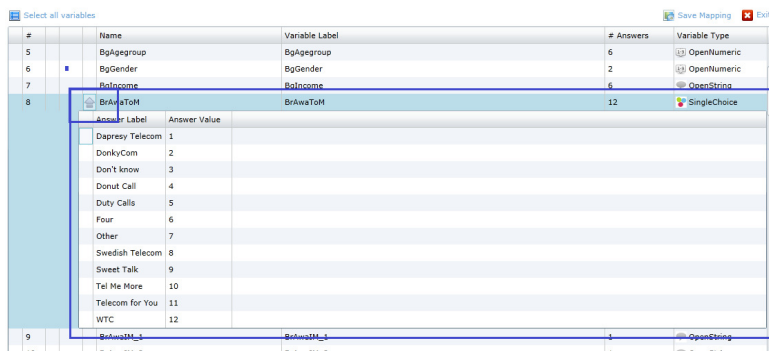
To recode a string/numeric simply change variable type in the most right column as shown in the image below. When doing that all distinct options in the current data file is shown as answer alternatives as shown in the second image below.

The image below shows where to change variable typ.

The image below shows the created answer options, these appears when the type is changed from String/numeric to Single choice. Click the Arrow to view the answer options. In this mode the answer texts can be updated.

Note: If a Numeric variable is recoded into a Categorical variable the numeric value will be used as both Answer ID and Answer Text as default. The Answer text can be updated in the Meta data transformation tool before the import and it is highly recommended as all variables with same Answer text will share answer block.

4.3 IMPROVED DATA ACTIVATION

The logic in the Data Activation step has been improved which saves a lot of times in ongoing projects which are continuously loaded with new data.

In the previous version all selected data sets were activated but the new Data Activation does only process the changes from the previous activation which means that a data set that already is activated is not activated again.

No changes have been done in the user interfaces.

5 NEW MODULE - EVENT SERVER

Note: The Event Server is not included in the standard license hence no Administrator user has access right to it. For prices please contact your account manager or sales@dapresy.com

5.1 EVENT SERVER

A new Event Server module has been added to Dapresy Pro which supports automatic sending of alert emails based on respondent level data. It can be used in client satisfaction surveys for quickly and automatically detecting dissatisfied clients. If a client (respondent) is dissatisfied an email can be sent out to a manager within the company with respondent information such as open ended comments, background information and contact details.

In a project multiple Events can be created and each one has a defined condition (which result should trigger the Event email), a list of recipients and a defined content to include in the email. Multiple events with custom made conditions and recipients can be created for sending out different types of events to different people within an organization is easy to setup.

Below is an example email:

"Hello

The client(s) below will defiantly not recommend our company to family and friends. Please follow up those customers by using our internal policies.

Name: James Andersson
NPS score: 1
Negative comments: Lorem ipsum....
Phone number: XXX XXXX
Email address: XXX@XXX
Response date: 20130625
Travel date: 20130623

Name: Lars Karlsson
NPS score: 2
Negative comments: Lorem ipsum....
Phone number: XXX XXXX
Email address: XXX@XXX
Response date: 20130624
Travel date: 20130620

Best Regards
The CSI Team"

The Events emails are sent out automatically every time new data is activated in the project. A respondent will be included in one Event email only and not every time a new email is being sent out. The logic is based on the Respondent ID so if the Meta data transformation is used for adding the Respondent IDs to the data sets an Event email will be sent out twice for the same respondent if the same data set is imported twice. To make sure the same Event email is not sent out twice for the same respondents include a Respondent IDs in the uploaded data file.

5.1.1 SETUP EVENTS

The Event Server module is located in the Project Settings tab (in the project administration pages). In the page new Events are created and it is also possible to view the history of all Events.

The image below shows where to find the Event Server page.
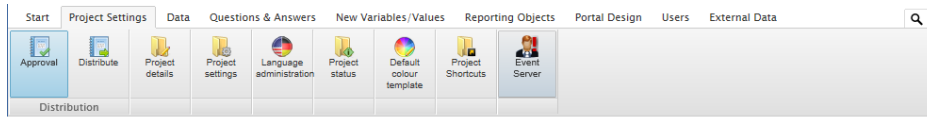
To create an Event the following must be defined:

1. The Condition – what should trigger the Event
2. A Mail template – which information should be included in the email
3. A list of recipients – who should get the Event emails.

The Conditions and Mail templates are being created as separate items, when creating the Event one or several Conditions and one Mail template is connected to the Event. This logic makes the setup of multiple events efficient.

Create Conditions

The Conditions are created in the Condition tab (see the image below). In the tab already created Conditions are shown in a list from which they can be deleted or edited.

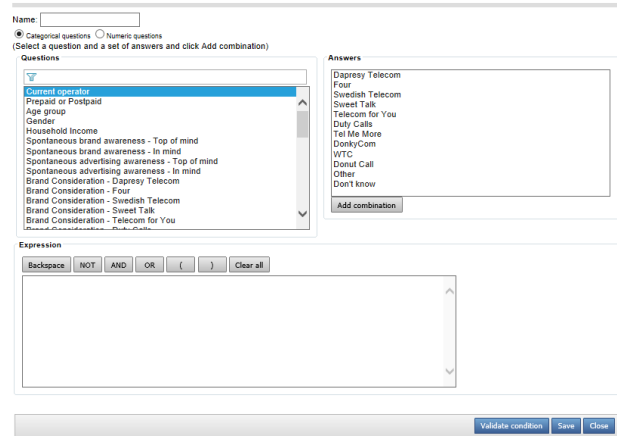*The image below shows the default view in the Condition tab.*
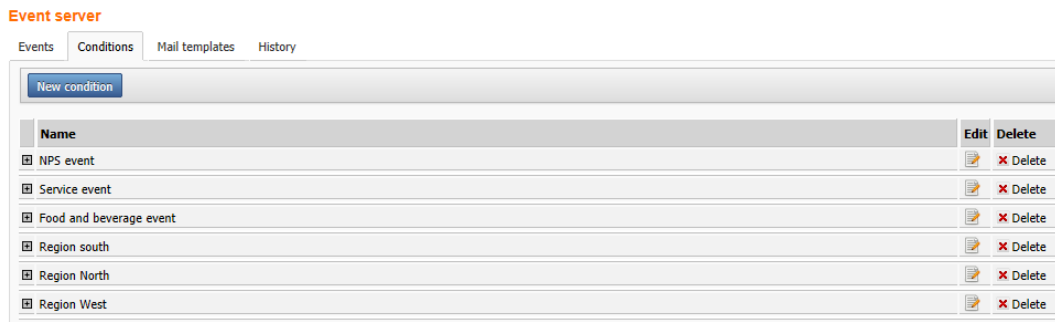
To create a new Condition click "New Condition" and a popup window appears as shown in the image below. Name the condition and use logical expressions in exactly the same way as in the Compute variable screen to define the rules. Always use the Validate function to validate the Condition before saving it.

The image below shows the setup of the Conditions.

In the later step when creating the Event multiple Conditions can be connected to the same Event. For Example: Customer satisfaction survey where an Event should be sent out to different region managers where each manager only should get dissatisfied clients in his/her region the following logic can be used:

1. Create one Condition for detecting the dissatisfied clients
2. Create one Condition per region which will be used as a filter to filtering out respondents per region.
3. When creating the Events, create one Event per region and connect the condition created in point 1 above and one of the conditions in point 2.

    By using this logic time will be saved in both the setup phase and in the future maintenance. If changes must be done in the Condition for detecting the dissatisfied clients it needs to be done in one place only and not one per region.

Create Mail template

The Mail templates are created in the Mail template tab (see the image below). In the tab the already created template are shown in a list from which they can be deleted or edited.

The image below shows the default view in the Mail template tab.

To create a new template click "New template" and a popup window appears. Name the template and define the following:

1. Email subject
2. Email content which
    a. Header
    b. Respondent details
    c. Footer

The Header and footer is normal text while the Respondent details are values from the data. When creating the templates the desired variables are added to the Respondent details part and when the Event email is being sent out the variables will be replaced with the actual responses.

In the example email below the blue part is the Header, the green part the Respondent details and the red part the Footer. The Header and Footer will be the same in all emails but the Respondent details will change based on which respondents that triggers the conditions for the event.

"Hello

The client(s) below will defiantly not recommend our company to friends and family. Please follow up those by using our internal policies.

Name: James Andersson
NPS: 1
Negative comments: Lorem ipsum….
Phone number: XXX XXXX
Email address: XXX@XXX
Response date: 20130625
Travel date: 20130623

Name: Lars Karlsson
NPS: 2
Negative comments: Lorem ipsum….
Phone number: XXX XXXX
Email address: XXX@XXX
Response date: 20130624
*Travel date: 20130620*

Best Regards
The CSI Team"

Note 1: If the Event email contains more than 50 respondents the respondent information will not be inserted in the email body, instead it will be inserted in a text file which will be attached to the email.
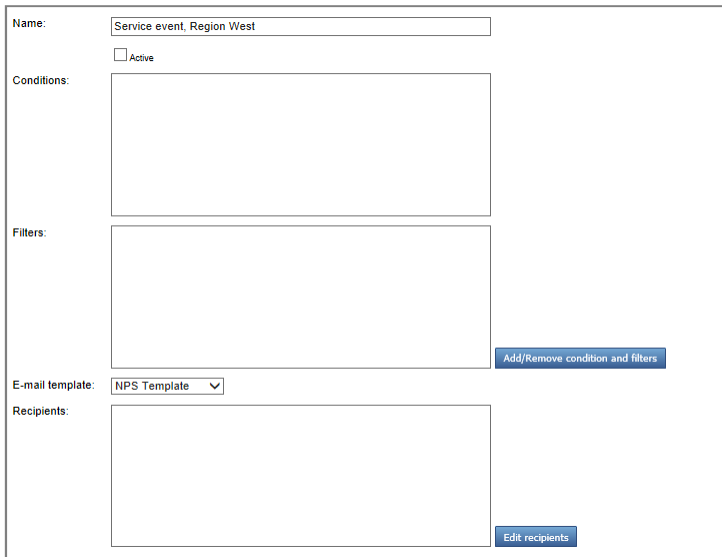
Create Events
The Events are created in the Event tab. In the tab the already created Events are shown in a list where they can be deleted, edited or be manually started (the Events can be started automatically as well during the data activation, see details further down).

To create a new Event click "New Event" and enter the name of the new Event.
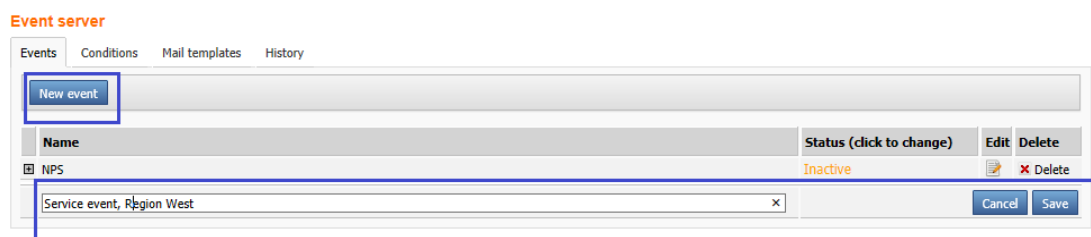
To add content to the Event click he "Edit" icon in the grid and a new popup window appears.
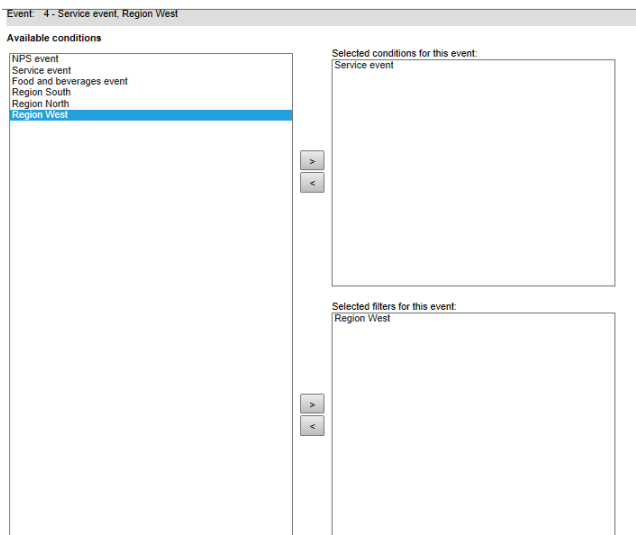
The image below shows the view for defining an Event.

When defining the content of the Event define if it should be Active or Inactive. If it is Active the Event emails will be sent out every time data is activated in the project.

Connect one or multiple Conditions to the Event by clicking "Add remove conditions and filters", if multiple Conditions are connected all Conditions must be fulfilled to trigger the Event. A condition can either be added as a Filter or as Condition as shown in the image below. It is no difference in logic between those, it is only a way to split up the definitions for better usability.

The image below shows the screen used adding Conditions to the Event.

Add one or multiple recipient to the Event by clicking Edit "Recipients", a recipient can either be a Report User in the project or an external person without a user account (enter an email address to the desired person).

5.1.2 EVENT HISTORY

To view which Events that have been triggered enter the History tab (shown in the image below). In this tab a

list shows the name of the Event, number of respondent that triggered the Event and the date the email was sent out. An email can also be resent if needed, click the "Send" button the resend an email.

Event server

Events   Conditions   Mail templates   **History**

Event name	Number of respondents	Date sent	
Service event, Region West	131	2013-06-28 11:13	Send

5.1.3 USE STORYTELLER/RESPONDENT DATA TABLE TO VISUALIZE THE DISSATIESFIED CLIENTS

The event module is a module in the Administration pages, to visualize for instance the dissatisfied clients that triggered the Events use the Respondent data table in the Storyteller as that module shows respondent level data. Set default filters on the table so only the respondents that triggered the Event are shown in the result table.

6 ADMINISTRATION UPDATES

6.1 EXPORT LIST OF PROJECTS

Support for exporting a list of all accessible projects into an Excel file has been added. The Administrator can download the list and it contains information about all the projects such as number of Report users, in which catalogues they are being stored etc.

The list can be downloaded from the Project selection page.

The image below shows the button for downloading the list of projects.
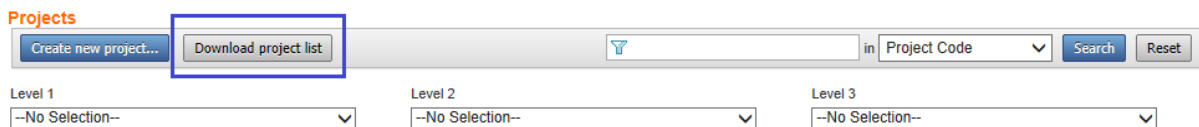
6.2 UPDATED VARIABLE LIMIT IN STORYTELLER CHART/TABLE SETUP

In the Storyteller setup of charts and tables the variable list was limited to 500 variables in the previous version. To find variables in project with more than 500 variables the search function or the Question Block filter could be used.

The image below shows the list which was limited to 500 variables in the previous version.
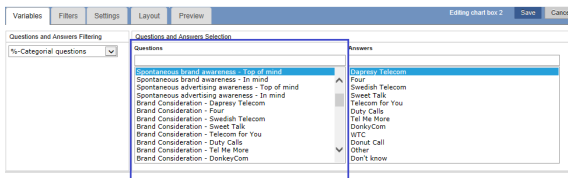
The limit has now been increased to 2000 variables, the limit can also be changed in the Project settings page (see the image further down below) to an even higher value. Though, the performance can be slow if setting a too high value so it is still recommended to use Question block for finding the variables if the list of variables are bigger than 500.

The image below shows the interface for changing the limit in the Project settings page.