

Dapresy 2021

April Release



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1 – Introduction

This document describes new and improved features in the Dapresy 2021 April Release.

If you would like to know more about these features, please contact the Confirmit Dapresy Support team at: supportdapresy@confirmit.com and they will be able to assist you.

Best Regards,

Dapresy Team

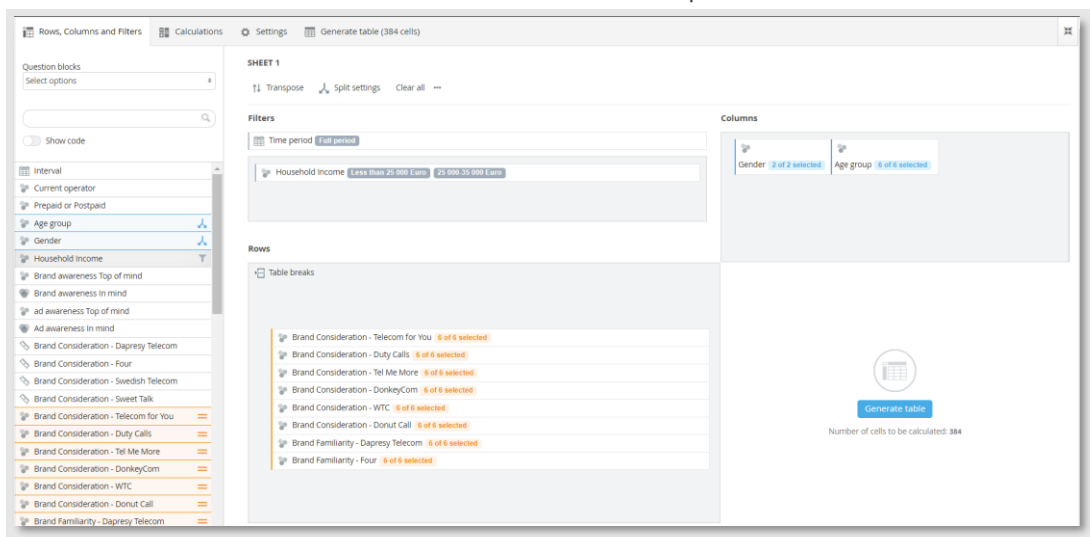
Email: supportdapresy@confirmit.com

2 - Overview

The Dapresy 2021 April update contains some large improvements, particularly to the Cross Table function and co-operative working with new sharing features, here is a summary:

Cross Table tool

- The Cross Table tool user interface is updated to be more intuitive and efficient to work in. You can now add questions, splits and filters to the table definition with drag and drop, the “Rows & Columns” and the “Filter” tabs are merged which gives a better overview of the table definition. Below we see an example of the new interface.

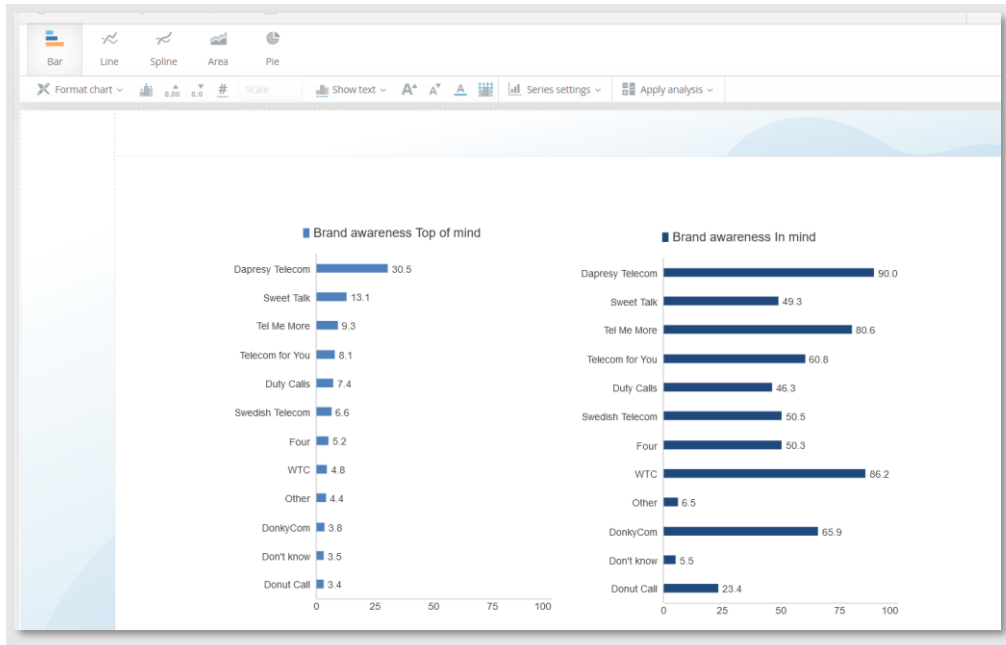


- A new “table breaks” concept introduced for producing topline reports and comprehensive workbooks more efficient. By using the new table break logic a single sheet in a workbook can contain a collection of tables all sharing the same settings and splits for efficient editing.
- When sharing a workbook to other users a “collaborative editing mode” can now be enabled so all the users with access to the shared workbook can save edits. Previously the workbook owner was the only user with rights to save changes to a shared workbook.
- For improved collaboration between Administrator users, a workbook can now be shared to an individual Administrator user or a set of Administrator users, previously we supported sharing a workbook to all other users or to a selected set of Report users only.

StoryCreator

- Deck sharing support is now available in the StoryCreator which allows an Administrator user or a Report user to share a deck to one or many other users.

- When sharing a deck, the user can enable a “collaboration mode” so all the users with access to the shared deck can save their own edits.
- A table/chart in a saved deck can now be sorted by another table/chart in the same deck. Below we see an example where the “In mind brand awareness” chart to the right is sorted by the “Top of mind awareness” chart to the left.



Report user management

- As an Administrator user you can now login as a Report user without knowing the password by copying a “direct” link. Each copied direct link is valid for a one-time login.
- When using multi factor authentication a verification code is sent to the email address associated with the user’s account during the login process. The email sender address can now be customized for an improved white-labeling support. Contact the support (supportdapresy@confirmit.com) for help to change the email sender address if you are using the multi factor authentication feature.

Administration pages

- The Approval page and related logic has been removed from the system to streamline the administration process. The raw data export can now be made without any approvals.

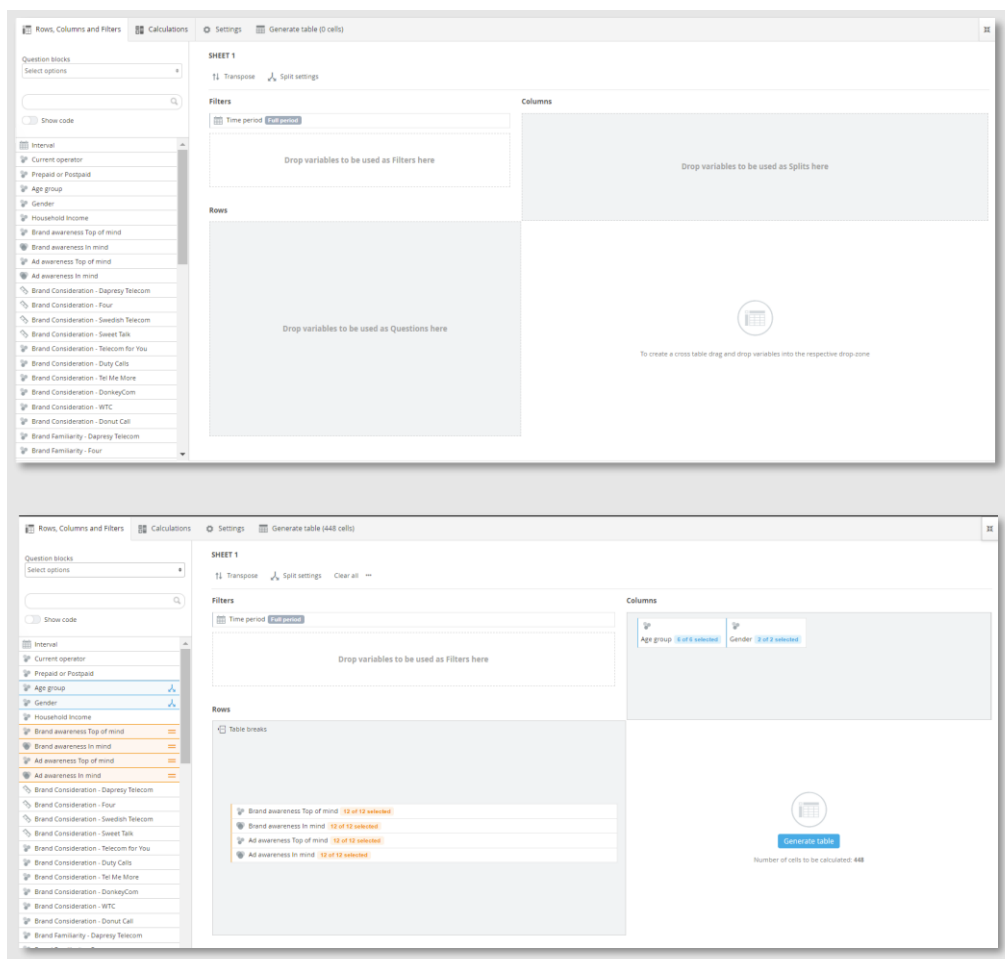
3 Cross Table tool

3.1 Updated user interface

The user interface of the Cross Table tool is updated with the purpose to be more intuitive and more efficient to use. In short;

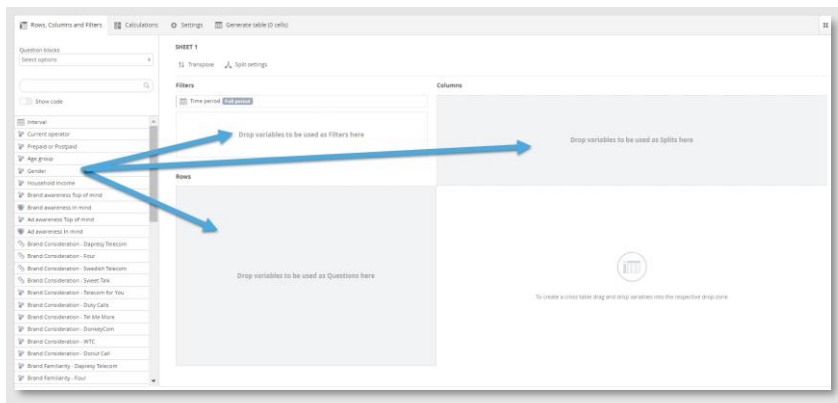
- The “Rows and Columns” and the “Filter” tabs are merged, which results in a better overview of the table definitions.
- A new drag and drop concept makes it easier to add variables as Questions, Splits and Filters. The old “fly out” menu used to add variables is still available but the new drag and drop concept is easier to use.

This is the new drag and drop interface. First image shows the default view on page load and second image an example where questions, splits and filters have been added.

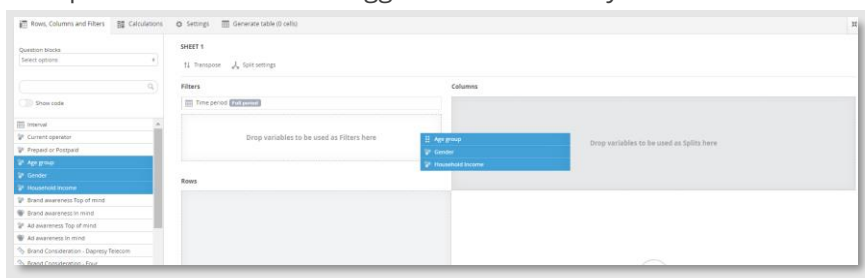


Below you see how to work in the new interface.

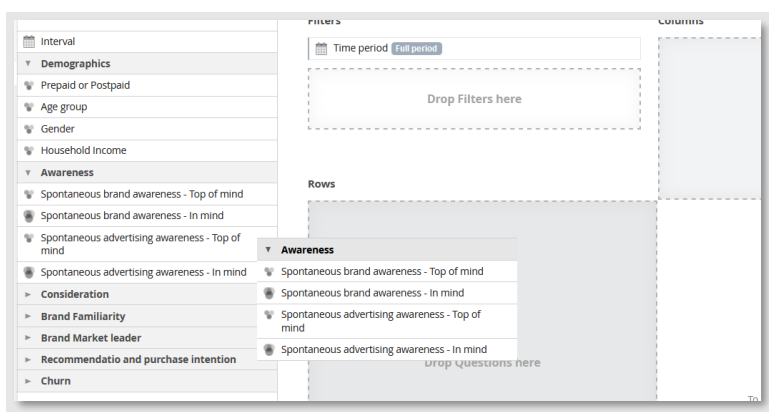
- Variables from the left-hand side menu are dragged and dropped in any of the three drop-zones Questions, Splits or Filters (note, only categorical variables can be dropped in Filters and Splits drop-zones as numeric- and index-variables can be used as Questions only).



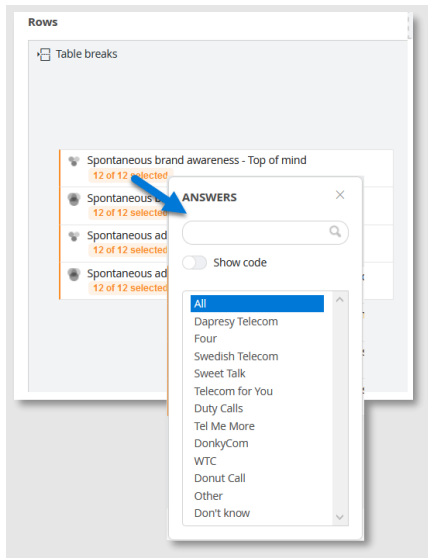
- Multiple variables can be dragged simultaneously.



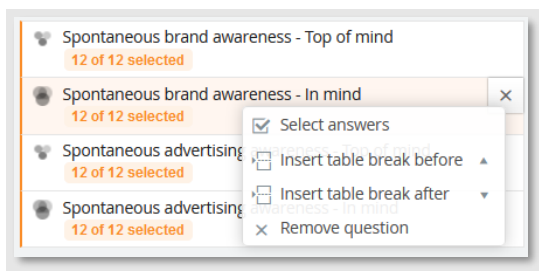
- If the variable list is grouped by question blocks all the variables in a question block can be added as questions or splits by start dragging from the question block name, see example below.



- The answers to be shown in rows/columns or applied as filters are limited by clicking the “number of selected answer” label.

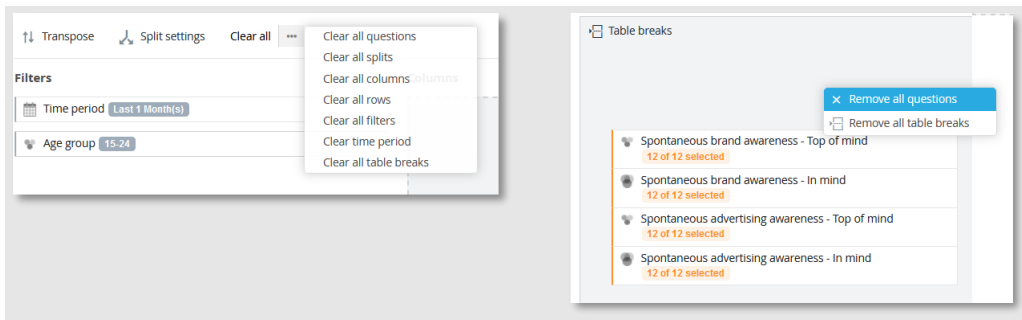


- A context menu can be opened on right click as shown below and from here the question can be removed and the answer selection menu can be opened. Table breaks are also added from here, see more details about table breaks in chapter 3.2.

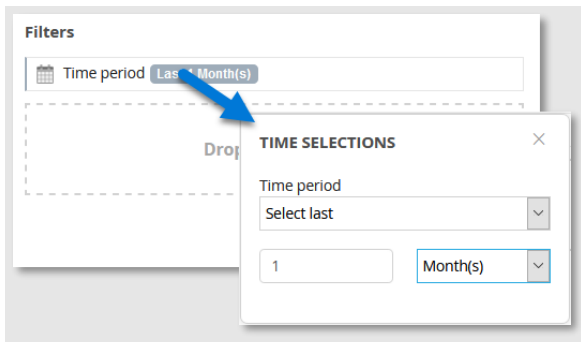


- The variables added as questions, splits and filters are cleared by using “Clear all” or any of the clear options in menu at the top. Variables can also be removed via the context

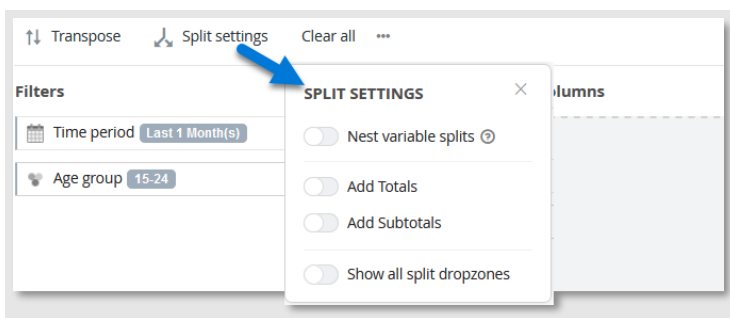
menu opened on right-click as shown to the right below.



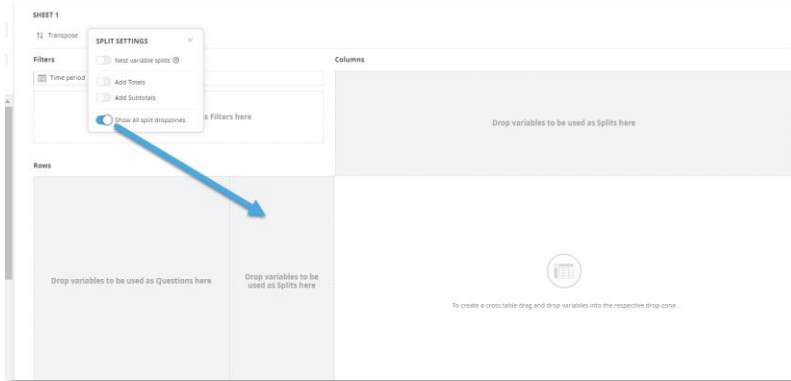
- The Time period filter is positioned at the top of the filter area as shown below. Click the time period text to make a new time period selection.



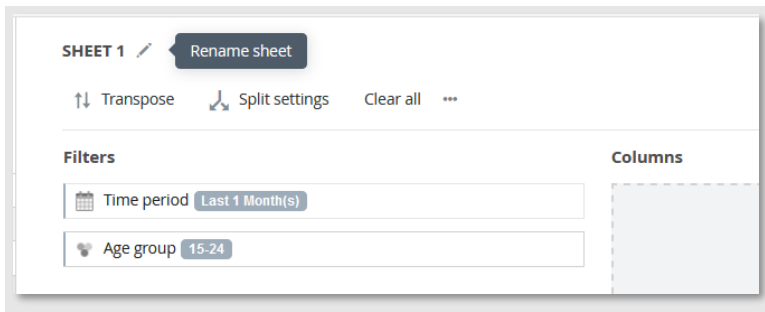
- The splits settings: Nest splits, Add Total and Add Subtotals are in a new menu named "Split settings". Note, splits were previously nested by default but now splits are shown side by side by default.



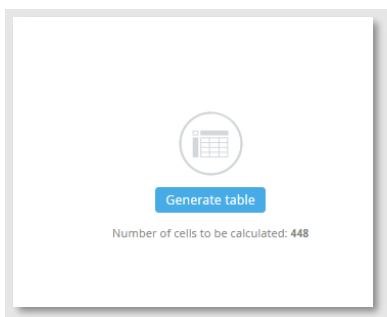
- The split dropzone is located in columns by default, for advanced table creation enable additional split dropzone by ticking the “Show all split dropzones” option in the Split setting menu.



- The sheet name is displayed at the top of the “Rows, Columns and Filter” tab, click the text to edit the sheet name. This name is applied when the sheet is exported to Excel.



- Generate the table by clicking the Generate tab at the top like before or use the new generate button in the table definition area.



3.2 Table breaks

A new table breaks concept is introduced for producing topline reports and comprehensive workbooks more efficient. By using the new table break logic a single sheet, in a workbook, can contain a collection of tables which all shares the same settings and splits but with different questions. Below we see an example of the setup and the result.

In the example below table breaks are inserted between every question which produces a separate table per question. These tables can be exported to Excel as separate sheets or into a single sheet.

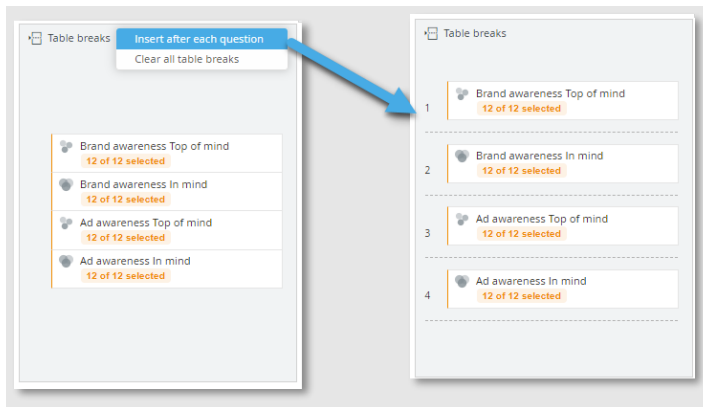
The screenshot shows a software interface with a 'Table breaks' panel on the left and a main data view on the right. The 'Table breaks' panel lists four items: 'Brand awareness Top of mind', 'Brand awareness In mind', 'Ad awareness Top of mind', and 'Ad awareness In mind'. A blue arrow points from the second item to the main data view. The main view displays a table for 'Brand awareness Top of mind' with columns for Age group (15-24, 25-34, 35-44, 45-54, 55-64, 65+) and Gender (Man, Woman). The table includes rows for Unweighted base, Weighted base, and various brands like Dapresy Telecom, Four, Sweafish Telecom, Sweet Talk, Telecom for You, Duty Calls, Tel Me More, DonkyCom, WTC, Donut Call, Other, and Don't know. Below this, a table for 'Brand awareness In mind' is partially visible.

3.2.1 Table break setup

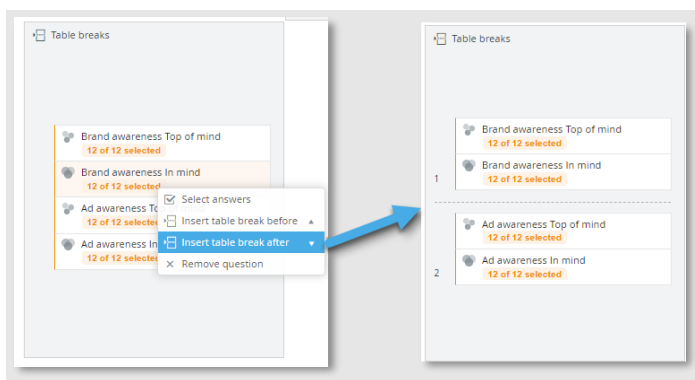
As shown above the table breaks split the questions into several tables instead of displaying the result of all questions in one big table.

A sheet can have zero to many table breaks, below you see how to add and remove table breaks.

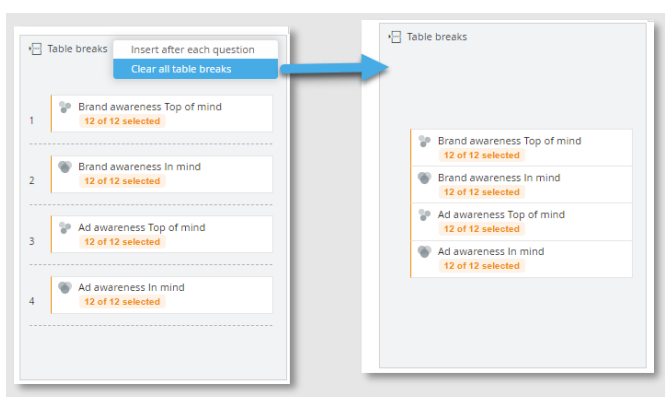
- Table breaks can be inserted after each question with a single click via the Table breaks menu.



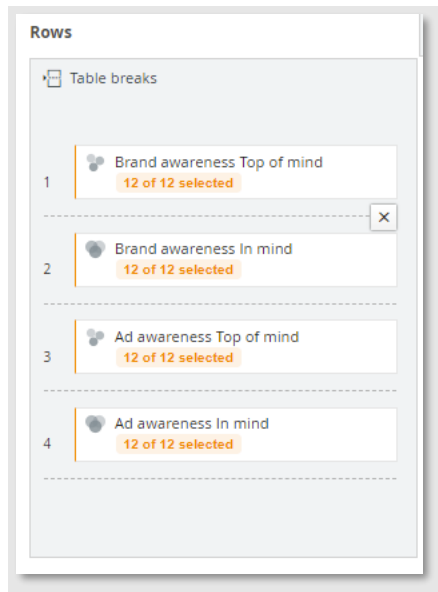
- Table breaks are inserted in custom positions by using any of the “Insert table break” options in the context menu (opened on right click).



- Tables breaks can be repositioned with drag and drop.
- All the table breaks can be removed via the top Table breaks menu.



- A table break can be removed by using the X option which appears when a specific table break is selected.



Note the following limitations when using table breaks: Significance testing, benchmarking and ranking cannot be calculated between questions as questions might be in different tables. As soon as a table break is inserted the significance testing, benchmarking and ranking options applied between questions becomes disabled.

3.2.2 Excel export of workbook with table breaks

When exporting a workbook with table breaks to Excel the following export options are available:

- Export all sheets as separate Excel sheets.
- Export all tables as separate Excel sheets.
- Export all sheets into one single Excel worksheet.

Note: the second option above is only applicable when table breaks have been used.

When exporting as “Export all tables as separate Excel sheets” all tables from all sheets are exported as separate sheets.

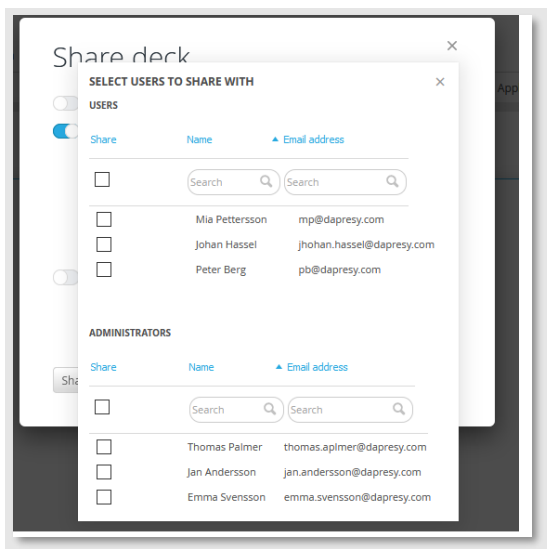
Example, a workbook contains 3 sheets and 1st sheet contains 4 tables, 2nd sheet 5 tables and 3rd sheet 2 tables. The exported Excel file contains 4+5+2= 11 worksheets.

3.3 Improved sharing and collaboration

3.3.1 Share workbooks to Administrator users

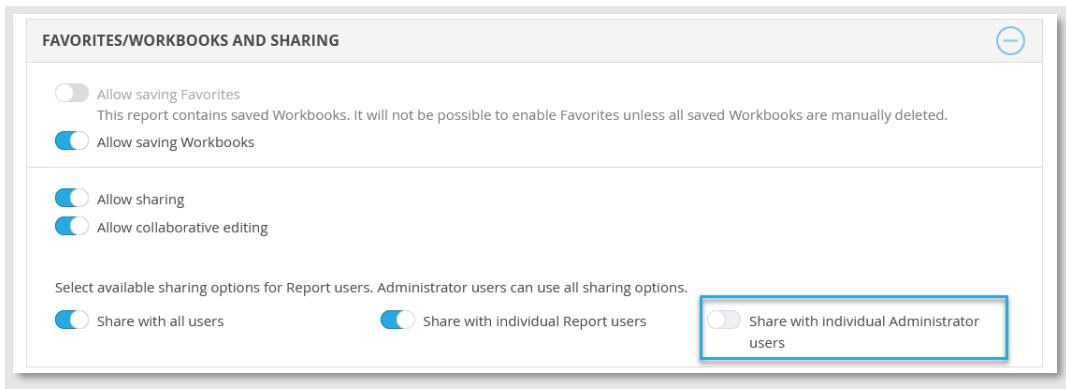
For an improved collaboration between Administrator users a workbook can now be shared to individual Administrator user or a set of Administrator users, previously it was supported to share a workbook to all other users or to a selected set of Report users only.

Here we see an example of sharing to Administrator users. The Administrator user list includes all Administrator users with access to the project, the list cannot be limited to a subset of Administrator users.



Note: The Administrator users can share to other Administrator users by default but the Report users cannot. If the Report users should have the rights to share to Administrator users it needs to be enabled in the Cross Table tool setup as shown below.

This is the option to be enabled if Report users should have the right to share to individual Administrator users.



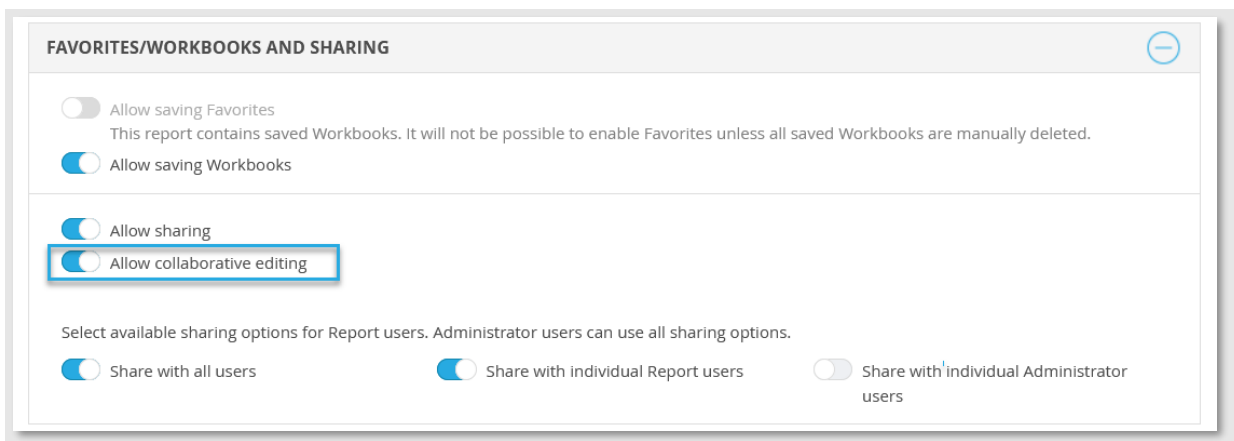
3.3.2 Share workbooks in collaborative editing mode

When sharing a workbook to other users a “collaborative editing mode” can now be enabled so users with access to the shared workbook can save edits to the workbook.

3.3.2.1 Enable collaborative editing mode – a Cross Table tool level setting

The ability to share workbooks in collaborative editing mode is enabled by default in all newly created Cross table reports but disabled in the already existing reports.

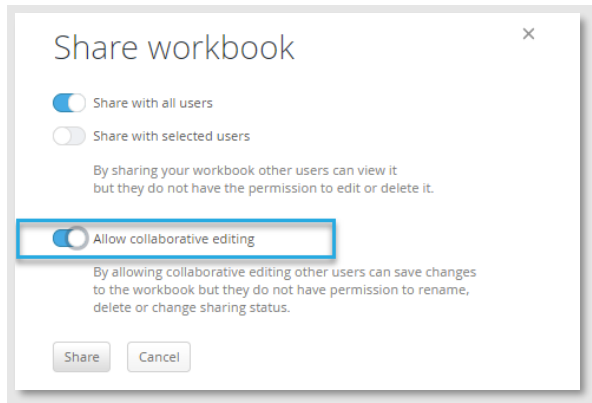
The Administrator user enables and disables the ability for the users to share in collaborative editing mode in the Cross Table tool Setup panel as shown below.



3.3.2.2 Share a workbook to other users in a collaborative editing mode

To share a saved workbook to other users in collaborative editing mode enter the Sharing panel. In the sharing panel a new option named “Allow collaborative editing” is

used to specify if the users with access to the workbook should have the rights to save edits to it or not. The new setting is highlighted in the image below.



3.3.2.3 Open and save edits to a workbook shared in collaborative editing mode

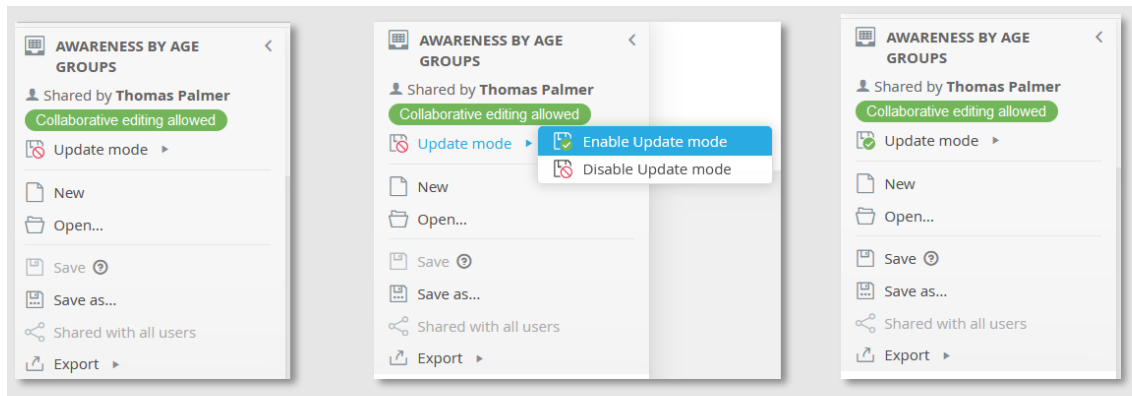
In the workbook panel, from where you open workbooks shared by other users, the column “Collaborative editing allowed” indicates if edits can be saved to the shared workbook or not.

Example of shared workbooks panel, the red and green icons indicate if collaborative editing is allowed or not.

Name	Description	Collaborative editing allowed	Owner	Created	Modified	Modified by
Awareness - no splits		✓	Testuser Testuser	2021-03-23	-	
Awareness by age group		✓	Testuser Testuser	2021-03-23	-	
Awareness by week		✗	Testuser Testuser	2021-03-23	-	
ssdwdwww		✓	Testuser Testuser	2021-03-23	-	

When opening a shared workbook supporting collaborative editing you cannot save edits by default as save option is disabled. To save edits to the shared workbook enable the “Update mode” and the Save option becomes enabled.

To the most left we see how Save is disabled by default when opening a workbook allowing collaborative editing, to the right Save is enabled as Updated mode is selected.



Note: only one user can work in update mode at the time, though multiple users can load a shared workbook simultaneously to view the results and make edits but not save those unless saved as a new workbook.

It is recommended to leave update mode after saved changes so other users are not “locked out” of update mode in the same workbook.

A user is automatically “released” from the Update mode when navigating to another report, selecting another workbook, creating a new workbook, logging out or after 20 minutes of inactivity.

4 StoryCreator

4.1 Sharing and collaboration

Deck sharing support is now available in the StoryCreator which allows an Administrator user or a Report user to share a deck to one or many other users. The new deck sharing function uses same logic as workbook sharing in the Cross Table tool which means that:

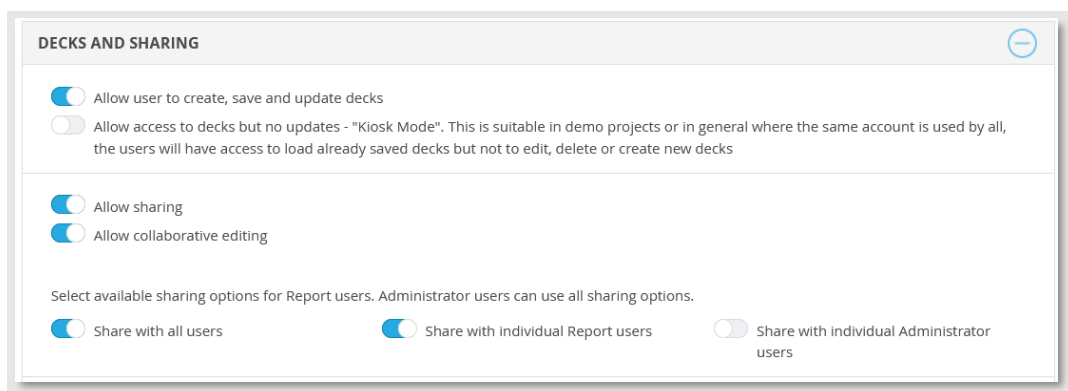
- the Administrator user enables/disables the ability to share decks. All the existing StoryCreator reports have sharing disabled by default but newly created StoryCreator reports have sharing enabled by default. Read more about the setup in chapter 4.1.1.
- When sharing is enabled, the users can share a deck to all other users or to selected Report users/Administrator users. When sharing a deck to all users only the users with access to all the items (Hierarchical filters, Filters and Variable subsets) in the deck can see and load the shared deck.
- When sharing a deck to selected users you can only share to users with access to all the items in the shared deck.

The new “collaborative editing mode” added to Cross Table tool in this release is also available in StoryCreator. When collaborative editing mode is enabled in a shared deck all the users with access to it can save edits to the deck.

4.1.1 Enable/Disable sharing - a StoryCreator level setting

In the StoryCreator Setup page the Administrator user can enable and disable the sharing and collaboration support on a StoryCreator level. All the existing StoryCreator reports have sharing disabled by default but newly created StoryCreator reports have sharing and collaboration enabled by default.

The default sharing and collaboration settings when creating a new StoryCreator report.



Note 1. The Administrator users can use all the sharing options when Sharing is enabled, an Administrator user can for example share to another Administrator user even if the Report users do not have the rights to do that.

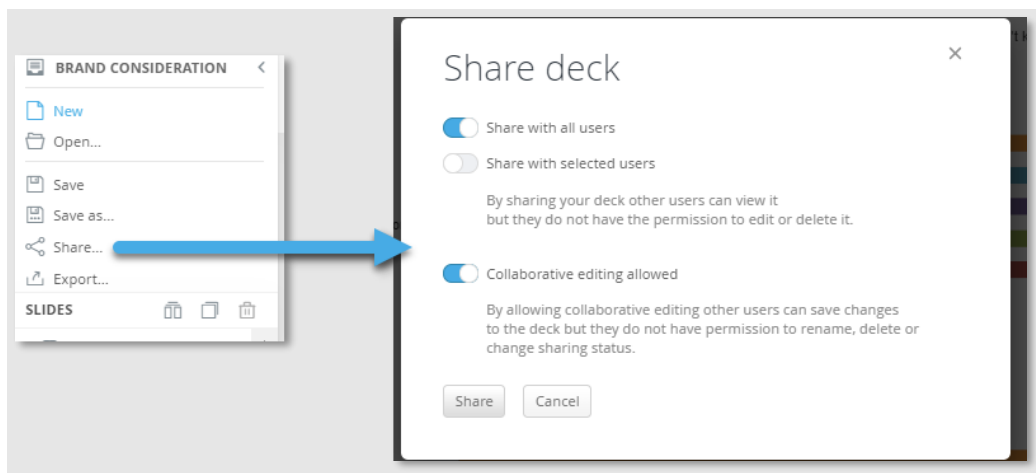
Note 2: if Report users can share to selected Administrator users they will see all Administrator users with access to the project, the list cannot be limited to a subset of Administrator users.

4.1.2 Share deck, load shared deck and work in collaborative editing mode

4.1.2.1 Share a deck to other users

A saved deck is shared to other users in the Sharing panel shown below. In the sharing panel you enable sharing, select to which users to share the deck and if the users should have the rights to save edits to the deck or not.

The left image shows the link to the sharing panel, the right image shows the sharing panel.



4.1.2.2 Open deck shared by another user

To open a deck shared by another user enter the Deck panel and the second sheet which lists all the decks shared with you. The column "Collaborative editing allowed" indicates if the deck is shared in collaborative editing mode or not (the column is hidden if collaborative editing is disabled on a StoryCreator level).

This is the Deck panel from a Report user perspective, the second tab lists all decks shared with the logged in user.

Name	Description	Shared	Collaborative editing allowed	Owner	Created	Modified	Modified by
Brand consideration		Shared with all users	✓	Thomas Palmer	2021-03-24	2021-03-24	Thomas Palmer
Brand funnel - all brands last month		Shared with all users	✗	Peter Berg	2021-03-24	-	
Brand funnel - trends		Shared with all users	✗	Peter Berg	2021-03-24	-	
Monthly trends		Shared with all users	✓	Thomas Palmer	2021-03-24	-	
Weekly trends		Shared with all users	✓	Thomas Palmer	2021-03-24	-	

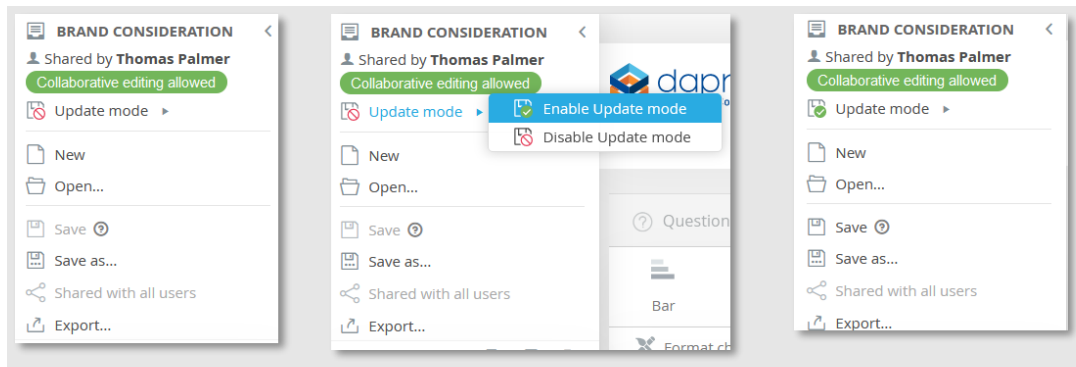
Note, as an Administrator user a third sheet is shown in the Deck panel which lists all the decks not shared with the logged in Administrator user, from here you can load any deck created by any Report user.

Name	Description	Shared	Owner	Created	Modified	Modified by
Brand overview		Not shared	Thomas Palmer	2021-03-24	-	
Monthly trends, awareness		Not shared	Thomas Palmer	2021-03-24	-	
Monthly trends, churn		Not shared	Thomas Palmer	2021-03-24	-	
Test dashboard		Not shared	Thomas Palmer	2021-03-24	-	

4.1.2.3 How to save changes to a deck shared in collaborative editing mode

When loading a deck supporting collaborative editing you cannot save edits to the shared deck by default as save option is disabled. To save your changes enable the “update” mode which enables the Save option.

To the most left we see how Save is disabled by default and then enabled when user enabled Update mode.

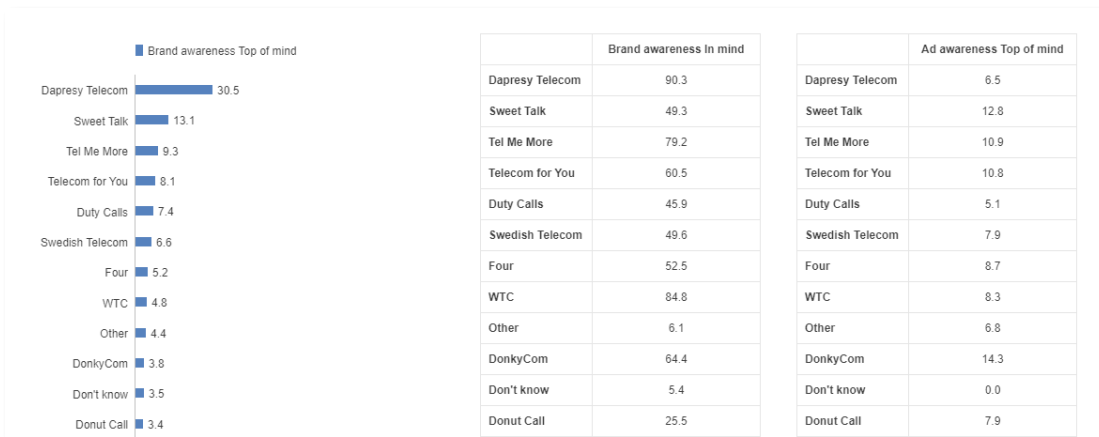


Only one user can work in update mode at the time, though multiple users can load the shared deck simultaneously to view the results and make edits but not save those unless it is saved as a new deck. It is recommended to leave update mode after you saved changes so other users can enter the update mode in same deck.

If you opened a deck and enabled the update mode you are “released” from update mode when navigating to another report, selecting another deck, creating a new deck, logging out or if you are inactive for more than 20 minutes.

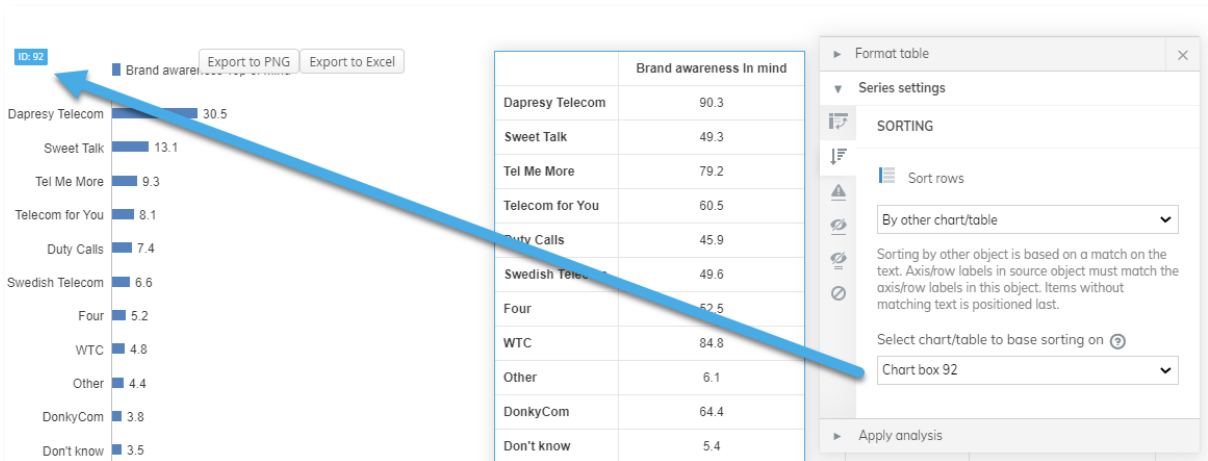
4.2 Improved sorting, sort on other objects

A table or a chart in a saved StoryCreator deck can now be sorted by another table/chart in the same deck. Below we see an example where the two tables to the right are sorted by the chart to the left.



The sorting of the series is like before specified in the Sorting panel in Series Settings, see image below. To sort an object (chart or table) on another object select the new option “By other chart/table” and the object Id of the object to sort on.

Example of setup, the selected table is sorted by the chart id 92.



Note the following rules:

- only a saved chart/table can be used as source, if a chart/table is missing in the list save the deck first.
- sorting by other object is based on a match on the text. Axis/row labels in source object must match the axis/row labels in the current object. Items without matching text is positioned last.

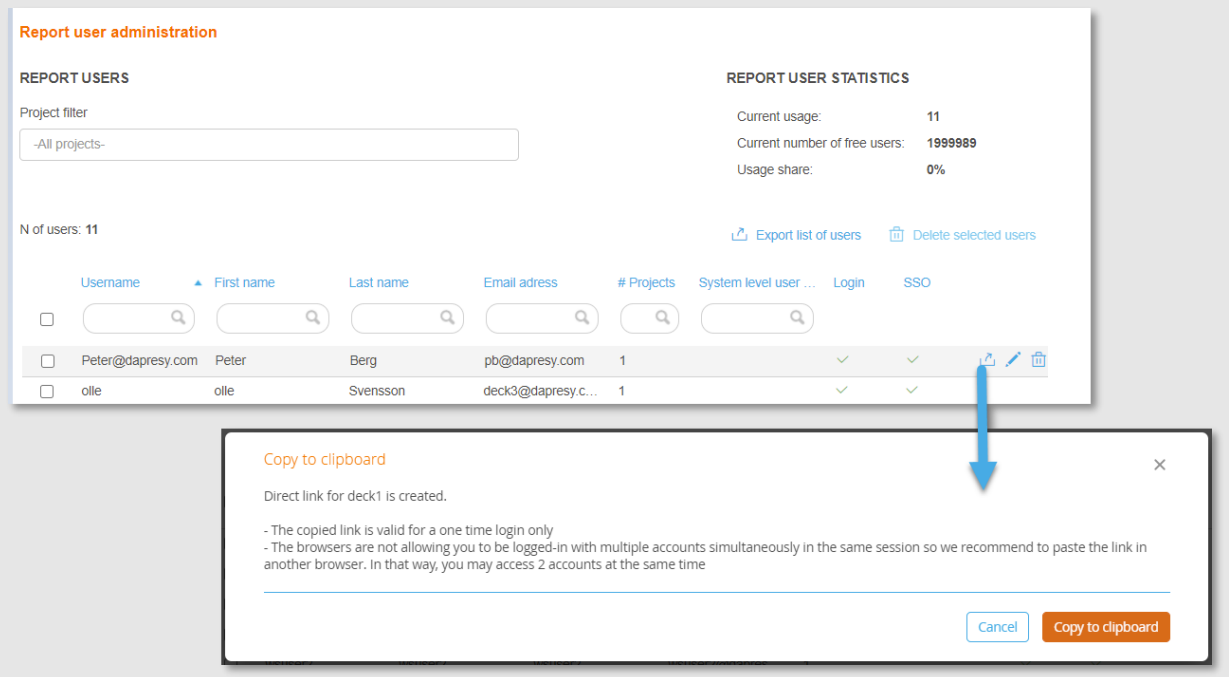
5 Report user management

5.1 Copy direct link

You can now login as any Report user without knowing the password by copying a “direct” link for a specific Report user. The direct link is valid for single use, if you need to login as the user again copy a new direct link.

To copy a direct link enter the global Report user page which list all your Report users from all the project. In this page find the relevant user and use the Copy direct link option.

Here we see how to copy the direct link.



The screenshot shows the 'Report user administration' interface. On the left, there's a 'REPORT USERS' section with a 'Project filter' dropdown set to '-All projects-'. Below it, it says 'N of users: 11'. On the right, there's a 'REPORT USER STATISTICS' section with the following data:

Current usage:	11
Current number of free users:	1999989
Usage share:	0%

Below the statistics are two buttons: 'Export list of users' and 'Delete selected users'. The main part of the interface is a table of users with columns: Username, First name, Last name, Email address, # Projects, System level user..., Login, and SSO. Two users are listed:

	Username	First name	Last name	Email address	# Projects	System level user ...	Login	SSO
<input type="checkbox"/>	Peter@dapresy.com	Peter	Berg	pb@dapresy.com	1	✓	✓	
<input type="checkbox"/>	olle	olle	Svensson	deck3@dapresy.c...	1	✓	✓	

A blue arrow points from the copy icon in the second row to a 'Copy to clipboard' dialog box. The dialog box contains the following text:

Copy to clipboard

Direct link for deck1 is created.

- The copied link is valid for a one time login only
- The browsers are not allowing you to be logged-in with multiple accounts simultaneously in the same session so we recommend to paste the link in another browser. In that way, you may access 2 accounts at the same time

At the bottom of the dialog box are two buttons: 'Cancel' and 'Copy to clipboard'.

Note:

- The copied link is valid for a one-time login only.
- The browsers are not allowing you to be logged-in with multiple accounts simultaneously in the same session, we recommend pasting the link in another browser. In that way, you may access 2 accounts at the same time.

5.2 Multi factor authentication (MFA) email sender address

When using multi factor authentication for improved security a verification code is sent to the email address associated with the user's account during the login process. The email sender address can now be customized in order to improved white-labeling support. Contact the support team (supportdapresy@confirmit.com) for help to change the email sender address if you are using multi factor authentication.

6 Administration pages

6.1 Approval page has been removed

The Approval page and related logic is removed from the system to streamline the process. The raw data export is now available without any approvals.

Here we see the page that now has been removed.

The screenshot shows a web application interface with a top navigation bar containing 'Start', 'Project Settings', 'Data', 'Questions & Answers', 'Reporting Objects', 'Portal Design', and 'Users'. The 'Project Settings' menu is expanded, showing 'Approval', 'Project Settings', 'Event Server respondent based', and 'Event Server result based'. The 'Approval' option is selected and highlighted. Below the navigation, the page title is 'Setup Approvals' with a 'Save' button. The main content area is divided into two sections:

Step 1 : Approval of Questionnaire
Selecting this permission level prevents all editing in the questionnaire part of the project.

Select	Project Code	Project Name	Project Manager	Project Type	Created By	Created Date
<input type="checkbox"/>	514228	tp test 4/2	tp@dapresy.com	Brand/Advertiser express	tp@dapresy.com	2021-02-04

Step 2 : Approval of Raw Data Files Export via Email
Selecting this permission level allows exporting raw data via email.

Select	Project Code	Project Name	Project Manager	Project Type	Created By	Created Date
<input checked="" type="checkbox"/>	514228	tp test 4/2	tp@dapresy.com	Brand/Advertiser express	tp@dapresy.com	2021-02-04