

Dapresy 2020

December Release



Index

1 – Introduction	4
2 - Overview	5
3 Changes in Administration navigation	10
3.1 New Project selection and Project creation page.....	10
3.2 New Project settings page	13
3.3 New Portal tabs page	16
4 Questions page updates	19
4.1 Support for creating and editing Input variables.....	19
4.2 Preview of Answer block.....	19
4.3 Preview of Compute-, Merged- and Index expressions.....	20
4.4 Preview of Grouped answer expressions.....	20
4.5 Older pages moved from main menu to sub-menu	22
5 StoryTeller.....	23
5.1 Anonymity limit support in Respondent tables	23
5.1.1 Setup	23
5.2 Tag support for streamlined custom code.....	26
5.2.1 Setup	26
6 Respondent level Event emails	27
6.1 Specify sort order of respondents in Event emails	27
6.1.2 Setup	27
6.2 Pause Event emails and Response date limits now included in Excel file for Report user bulk updates	29
7 Auto-update of in-memory data model.....	30
8 Unit level action planning	31
8.1 Setup process overview	31
8.2 Setup of “Create new action” link in StoryTeller	32
8.2.1 Action respondents and response date	34
8.3 Action data	35
8.3.2 Action respondents not effected by computed variables	36

8.3.3 Data recoding.....	37
8.3.4 Raw data exports	37
8.3.5 Delete action data.....	37
8.3.6 Action data always activated	38
8.4 Action respondents and Event emails	39
9 Reference data.....	40
9.1 Categories and Filter sets.....	41
9.2 Setup	42
9.2.1 Importing Reference data	42
9.2.2 Reporting on reference data.....	51

1 – Introduction

This document describes new and improved features in the Dapresy 2020 December Release.

If you would like 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](#)

Email: support@dapresy.com

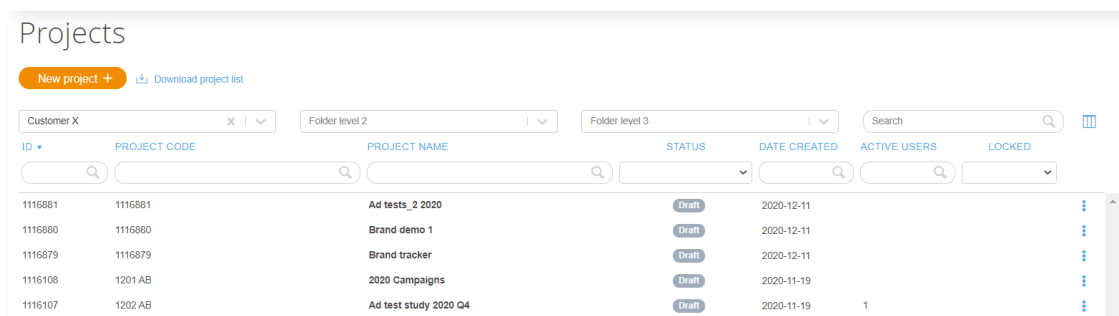
2 - Overview

The Dapresy 2020 December update contains a wide range of improvements in different areas to help you with new functionality and produce with improved efficiency, here is a summary:

Changes in Administration navigation

- We now have a new project selection and project creation page. The new page has a more modern look and feel and includes improvements in the project selection grid such as better project filtering, additional project information like last data activation date, number of logged in Report users etc.
The projects are sorted descending by creation date so newest projects comes first in the list which makes it easier to find your latest created projects.

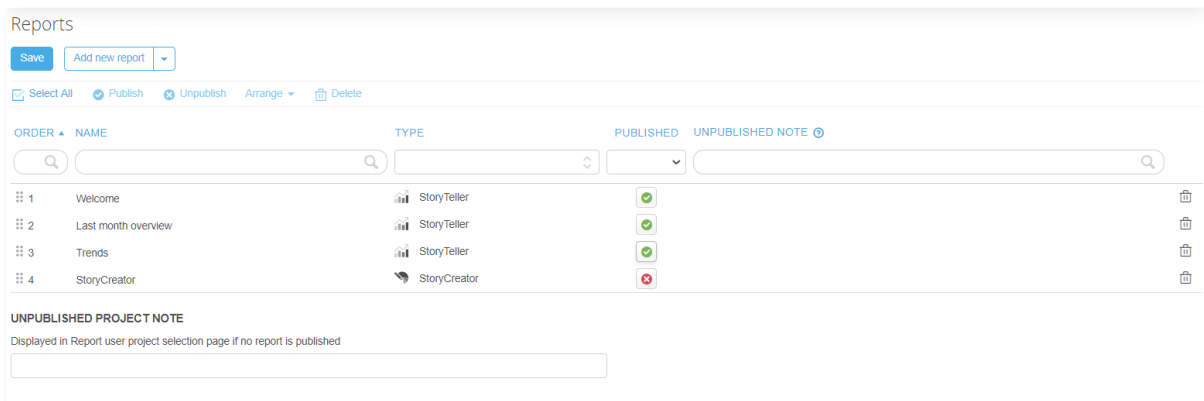
Here we see the new Project selection page



ID	PROJECT CODE	PROJECT NAME	STATUS	DATE CREATED	ACTIVE USERS	LOCKED
1116881	1116881	Ad tests_2 2020	Draft	2020-12-11		
1116880	1116880	Brand demo 1	Draft	2020-12-11		
1116879	1116879	Brand tracker	Draft	2020-12-11		
1116108	1201 AB	2020 Campaigns	Draft	2020-11-19		
1116107	1202 AB	Ad test study 2020 Q4	Draft	2020-11-19	1	

- All project settings administration tasks are now combined into the new Project settings page for a better workflow and improved efficiency. Functions from the following pages are now merged into a new Project settings page: Project Details, the old Project Settings, Language administration, Color templates, Word Cloud Exclusion and Project Shortcuts pages.
- The Portal tabs and Distribution pages are merged into a new Portals tabs page from where reports are both added and distributed. The term “Distributed” is from now on changed to “Published”. You can now also add, edit and publish reports directly from report Preview mode.

Here we see new Portal tabs page



Questions page updates

- Input variables can now be created and edited in the new Questions page which means that all types of questions now are maintained in a single screen.
- The Answer block of a question can now be previewed directly in question grid which gives a better overview of the questions in the project without having to navigate to the Answer block view.
- The content/expressions of created variables such as computes and index variables can now be previewed directly in question grid, previously you had to enter the edit mode of for example a computed variable to see the definition of each answer

Preview of expressions in a computed variable directly on the question grid:

ORDER	CODE	TEXT	TYPE	COLOR	ANSWER BLOCK	FILTER	FILTER TEXT
1	BgCurrentTop	Current operator	Single	Orange	Dapresy Telecom/Four/Swedish Telecom		
2	BgSubscrType	Prepaid or Postpaid	Single	Blue	Prepaid/Postpaid		
3	BgAgegroup	Age group	Single	Purple	15-24/25-34/35-44		
4	BgGender	Gender	Single	Green	Man/Woman		
5	Segments	Segments	Scale	Red	Segments		
		ID	ANSWER TEXT	EXPRESSION			
		1	Segment A	03-Age group=(1 - 15-24.2 - 25-34.3 - 35-44)*0 AND 02-Prepaid or Postpaid=(1 - Prepaid)*0 AND 05-Household Income=(1 - Les...			
		2	Segment B	03-Age group=(1 - 15-24.2 - 25-34.3 - 35-44)*0 AND 05-Household Income=(5 - 55 001- 64 000 Euro.6 - More than 65 000 Euro)*0			
		3	Segment C	05-Household Income=(4 - 45 001- 55 000 Euro.5 - 55 001- 64 000 Euro.6 - More than 65 000 Euro)*0 AND 02-Prepaid or Postp...			
6	Bgincome	Household Income	Single	Red	Less than 25 000 Euro/25 000-35 000 Euro/35...		
7	BrAwaToM	Spontaneous brand awareness - Top of mind	Single	Blue	Dapresy Telecom/Four/Swedish Telecom		
8	BrAwaToM	Spontaneous brand awareness - In mind	Multi	Blue	Dapresy Telecom/Four/Swedish Telecom		

- The content of a Grouped answer can now be previewed directly in Answer grid, previously you had to enter the edit mode of the Grouped answer to see how it was built.
- The older pages for creating and maintaining Computes, Inputs, Merged and Index variables are now removed from main administration menu as full support now is available in new Questions page.

StoryTeller

- Anonymity limits support is now available in Respondent tables in order to support suppressing results if there are too few respondents or comments based on defined thresholds.
- An object level tag concept is introduced which simplifies usage of custom JavaScript and CSS code to be applied to StoryTeller objects. CSS and JavaScript selectors can now reference the tags of the objects instead of the object ids which makes the custom code easier to write, easier to apply to multiple objects and also the CSS and JavaScript is applied to copied objects automatically as the tags are included in the new copy.

Enfesy/closed loop improvements

- When the Respondent level Event email includes all alerted respondents in a single email you can now specify the sort order of the respondents so most relevant respondents are shown first. The sorting can be based on multiple levels so, as an example, respondents with lowest recommendation score in most important customer class is shown at the top of the email to help the user the act on most relevant cases first.
- The Report user level Event related settings Pause Event emails and Response Date limits are now included in the Excel file for bulk create/edit Report users which makes bulk updates of Report users more efficient.

Auto-update of in-memory data model

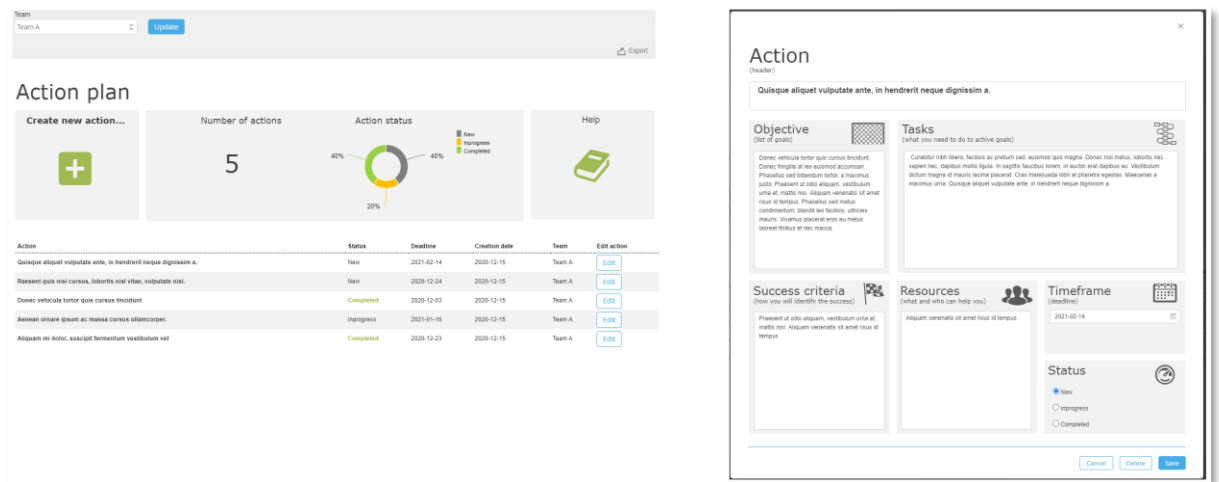
- The in-memory data model can now be updated automatically after updates in administration pages like changes in Questions page, newly created computed variables etc. so manual in-memory data model updates do not need to be made. This new logic is not applied by default, it is a new setting in Project settings page. It is not recommended to use the auto-update option in projects with a huge amount of data as that will result in longer loading times when saving any change that requires an update of the in-memory data model.

Action planning

- Unit level Action planning, also known as strategic action planning, is now supported which allows creating and connecting actions to organizational units (hierarchical filter nodes) or other types of segments, service lines, target groups etc. (optional filters). Unit level action planning were previously not supported as the actions always were connected to the uploaded respondents (case action management).

- As the new unit action plan support is an improvement of the current case management process the flow is built on Input variables, Forms, Event emails and StoryTeller reports which makes the action plan process customizable based on the customer needs. What input is required in action forms, how escalation processes and email reminders shall be used is flexible. Corporate layouts can also be applied to the action forms.
- Aggregated action statistics can be reported in, for example, StoryTeller dashboards in order to analyze number of open actions in different areas, number of delayed actions etc.

This is an Action plan example. The StoryTeller (the image to the left) lists all the current actions in a Respondent table and a few data objects show the action related statistics of the selected Team. The Form report (image to the right) is used for creating and editing actions.



Reference data module

- The new Reference data module allows you to compare survey results to external benchmark values such as internal targets, industry means, best in class benchmarks etc. The Reference data is stored separately within the project from the survey data and uploaded in a “reference data” friendly format. The reference values are connected to the question and answers in the project for an automated reporting process and can also be connected to the hierarchical filter units and other filters in order to compare survey results to the most relevant reference data.
- The reference data can be used in the StoryTeller report and visualized in charts and tables on its own or you can visualize differences between the survey result and the reference data.
It is also supported to use percentiles in the reference data to for example calculate a percentile ranking result which is common in employee research.

- A Category and Filter sets concept allows importing multiple types of reference values into the same project, as an example you can include reference values for “Best in class” and “Industry means” and let the Report user select which of these benchmarks to be used in the reporting

Example of a basic dashboard with reference data comparison, the left chart shows the mean values of the survey attributes and right the difference to the uploaded reference data.



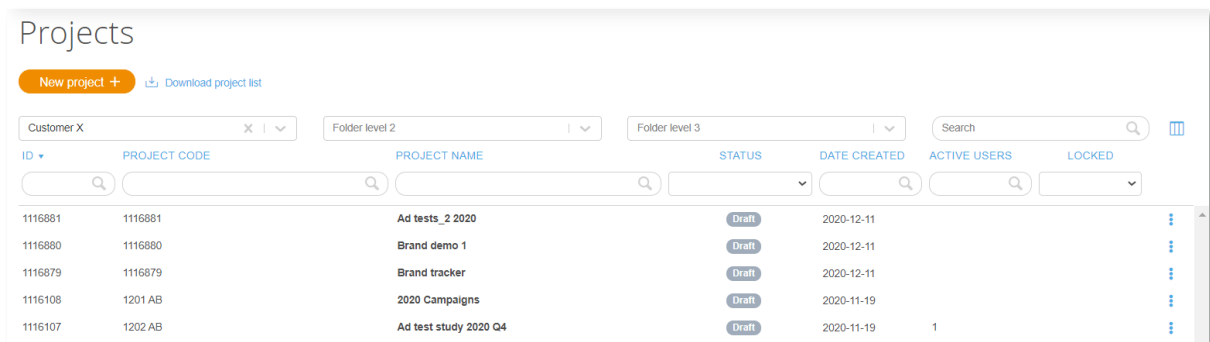
3 Changes in Administration navigation

3.1 New Project selection and Project creation page

There is now a new project selection- and project creation page. The new page has a more modern look and feel and includes improvements in the project selection grid such as better project filtering, additional project information like last data activation date, number of logged in Report users etc.

The projects are now sorted descending, by creation date, so newest projects comes first in the list which makes it easier to find your latest created projects.

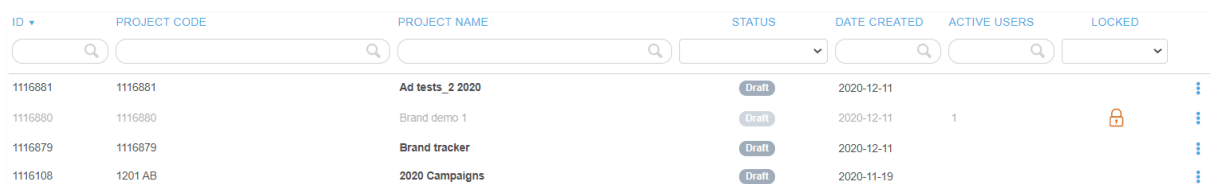
Here we see the new Project selection page.



ID	PROJECT CODE	PROJECT NAME	STATUS	DATE CREATED	ACTIVE USERS	LOCKED
1116881	1116881	Ad tests_2 2020	Draft	2020-12-11		
1116880	1116880	Brand demo 1	Draft	2020-12-11		
1116879	1116879	Brand tracker	Draft	2020-12-11		
1116108	1201 AB	2020 Campaigns	Draft	2020-11-19		
1116107	1202 AB	Ad test study 2020 Q4	Draft	2020-11-19	1	

To enter a project click the row of the project in the project list. Projects shown in disabled style are locked and used by another administrator user. To release a project, click the Lock icon or the icon with 3 dots in the most right column.

Here we see a Locked project, click the Lock icon or the 3 dots to release the project.



ID	PROJECT CODE	PROJECT NAME	STATUS	DATE CREATED	ACTIVE USERS	LOCKED
1116881	1116881	Ad tests_2 2020	Draft	2020-12-11		
1116880	1116880	Brand demo 1	Draft	2020-12-11	1	
1116879	1116879	Brand tracker	Draft	2020-12-11		
1116108	1201 AB	2020 Campaigns	Draft	2020-11-19		

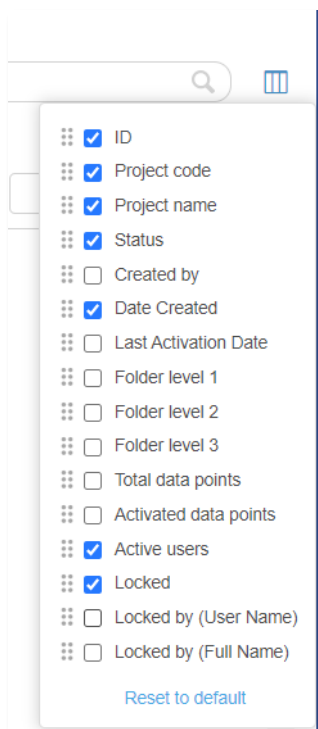
To copy or delete a project click the icon with 3 dots in most right column as shown below. Like before only projects without active Administrator users can be copied or deleted so the copy and delete options are not available when project is locked.

Here we see the Delete and Copy options.

ID	PROJECT CODE	PROJECT NAME	STATUS	DATE CREATED	ACTIVE USERS	LOCKED
1116881	1116881	Ad tests_2_2020	Draft	2020-12-11		
1116880	1116880	Brand demo 1	Draft	2020-12-11		
1116879	1116879	Brand tracker	Draft	2020-12-11		
1116108	1201 AB	2020 Campaigns	Draft	2020-11-19		
1116107	1202 AB	Ad test study 2020 Q4	Draft	2020-11-19		

Above the Project grid, on right hand side, you can open a column selection panel, where you can select additional columns, hide columns and re-order columns if needed. In the image further down you can see the available columns, note that the column "Active users" includes both Administrator users and Report users logged into the project and not only Report users.

The column selection panel.



Note, in the Project creation page the Code field is not shown by default as it is no longer mandatory. If you leave Code field blank the numeric project id is inserted as Code automatically during the creation process. Also, the Culture selection has been removed from project creation page, if you would like to change from the default English to any other standard language or any of your own languages you can change that in new Project settings page

The default Project creation view, click the arrow to show the code field if you would like to write your own code:

The screenshot shows a 'Create Project' dialog box with the following fields and options:

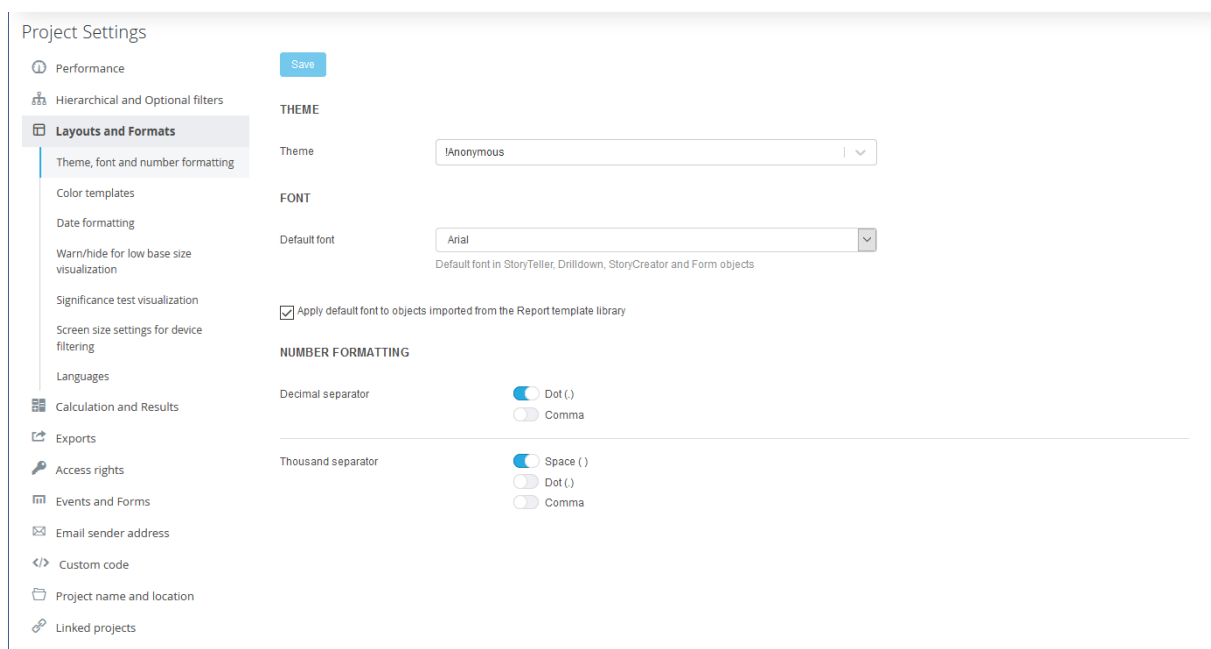
- GENERAL INFORMATION**
 - Project name:
 - Project code:
- LAYOUT**
 - Theme:
 - Color Template:
- LOCATION**
 - Level 1:
 - Level 2:
 - Level 3:

Buttons:

3.2 New Project settings page

All project settings administration tasks are combined into a new Project settings page for a better workflow and improved efficiency. Functions from the following pages are now merged into the new Project settings page: Project Details, the old Project Settings, Language administration, Color templates, Word Cloud Exclusion and Project Shortcuts pages.

The new Project settings page, the new Project settings page is located in the same position in the menu as the old Project settings page:



As shown in image above the new Project settings page is divided in multiple sub-pages, most used settings are comes first and less used settings in the bottom, here you see an overview of all the sub pages in the new Project settings page.

Performance: here you find the performane related settings such as in-memory and chaching updates and filter loading logic in for example the StoryTeller.

Hierarchical and Optional filters: shows the hierarchical and optional filter settings.

Layouts and Formats: used for layout and format related settings such as decimal and thousand separtors, date formatting and the theme selection which previoulsy was located in the old Project details page.

The Color templates and Language administration is also found in this menu.

Calculation and Results: this shows calculation related settings such as number of decimals to be used in sorting, benchmarking and ranking.

The Word cloud exclusion list which previously was a separate page in the main navigation menu is also shown here.

Note; The “Chart series rendering” setting is located in the section, it has now been renamed to “Chart series precision”.

Exports: contains all the export of reports related settings

Access rights: shows access related settings, like apply access to Filters

Events and Forms: Events and Forms related settings

Custom code: update and maintain JavaScript and CSS

Email sender address: set the default email sender address setting

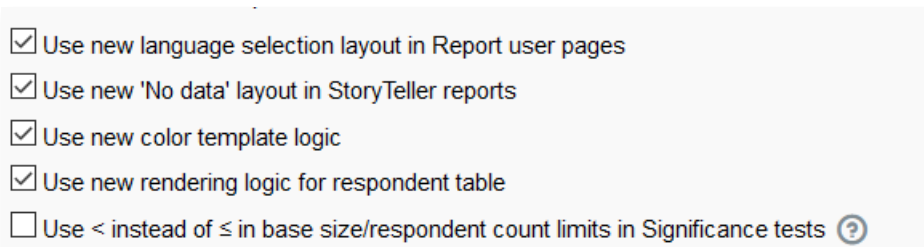
Project name and location: here you update project name and the project location (folders), these settings were previously located in the old Project details page.

Security: here you apply the “Infinite time out for reports” setting, in this new page it is renamed to “Do not apply session inactivity time out for reports”


Linked projects: here you set up links between projects. Linked projects were previously a separate page named Project shortcuts, in the main navigation menu.

Note: The “Legacy settings” section in old Project settings page is not available in the new Project settings page, if you need to change these settings use the old Project settings page. When the old Project settings page is retired in the future contact support if any change is needed.

This is the old legacy settings that are not available in new Project settings page

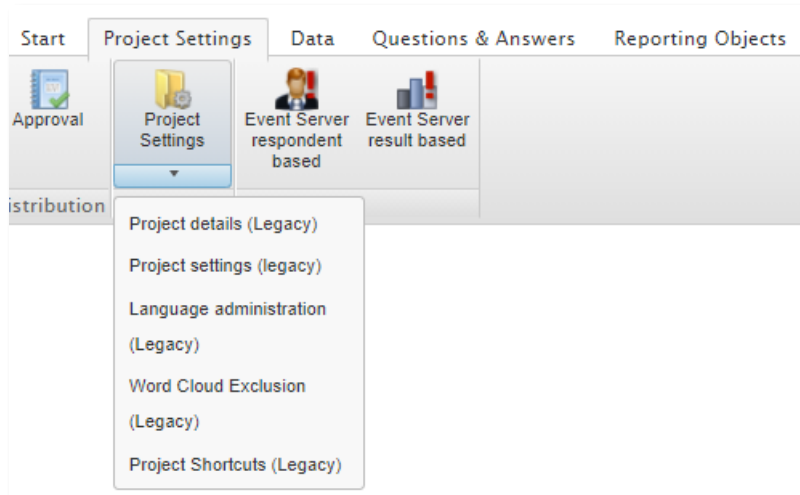


A screenshot of a settings panel with five checkboxes. The first four are checked, and the fifth is unchecked. A help icon is visible at the end of the last option.

- Use new language selection layout in Report user pages
- Use new 'No data' layout in StoryTeller reports
- Use new color template logic
- Use new rendering logic for respondent table
- Use < instead of ≤ in base size/respondent count limits in Significance tests 

Note 2: As shown below all the old pages are still available in the sub-menu for now but these will soon be retired and removed from the system.

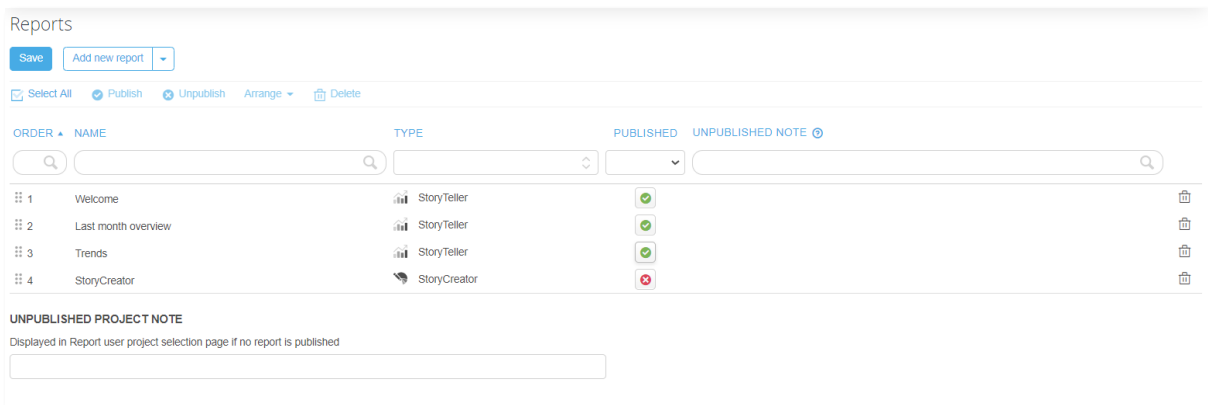
How to access the old pages:



3.3 New Portal tabs page

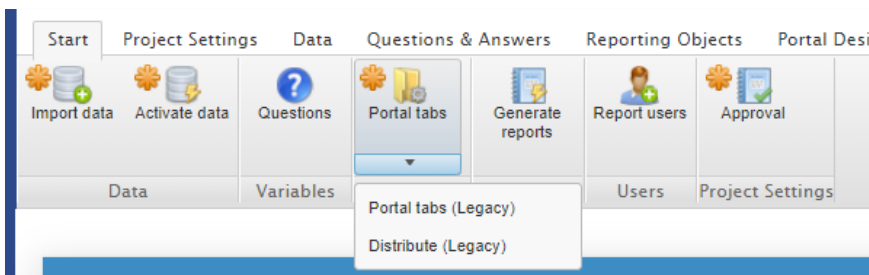
The Portal tabs and Distribution pages are merged into a new Portals tabs page from where reports are both added, named and distributed. The term “Distributed” is from now on changed to “Published”. You can now also add, edit and publish reports directly from report Preview mode.

Here we see the new Portals tab page which combines settings from the old Portal tabs and Distribution page.



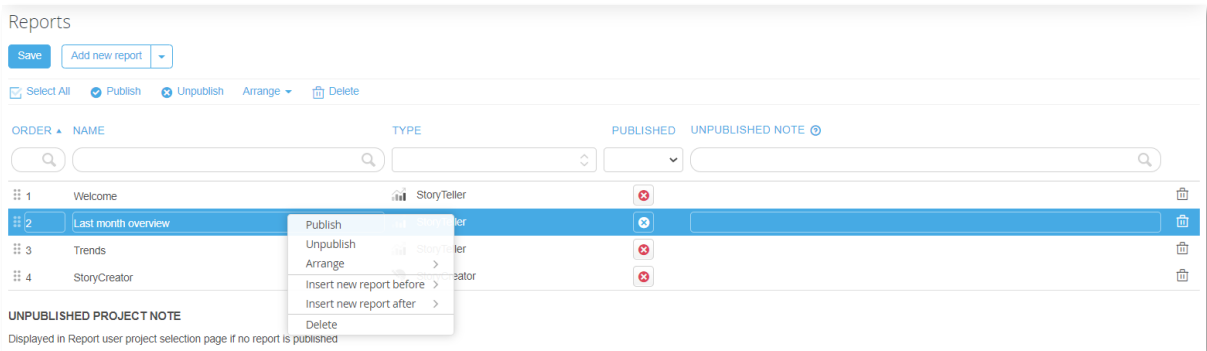
Both the old Portal tabs and Distribution page are still available for now but we recommend using this page as the old pages will be retired eventually.

Here we see how the old pages now are shown in the submenu.



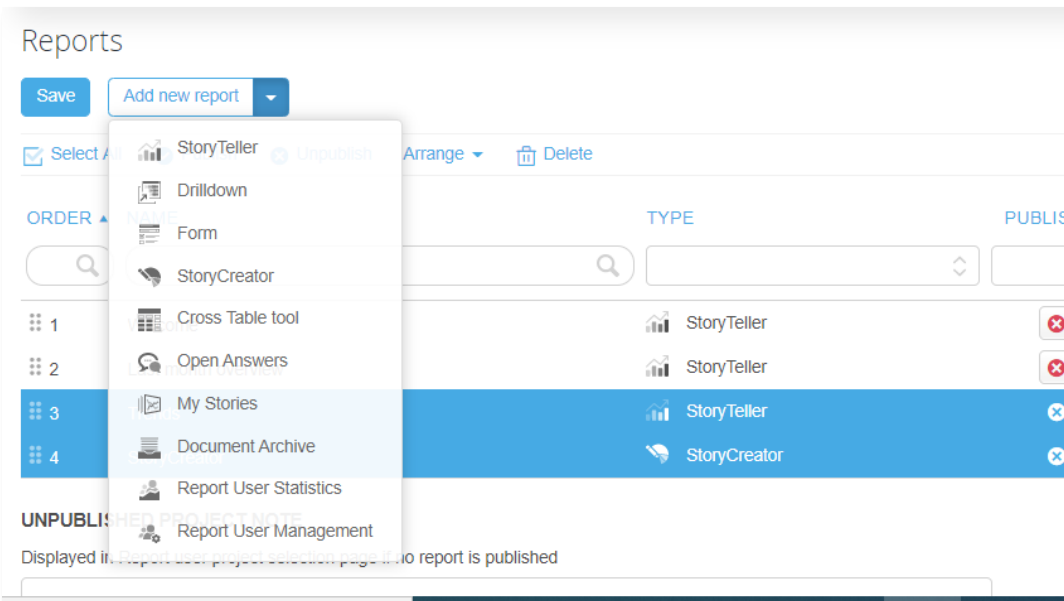
Tip 1; use the context menu on right click to insert a new report in before or after an existing report.

This image shows the context menu.

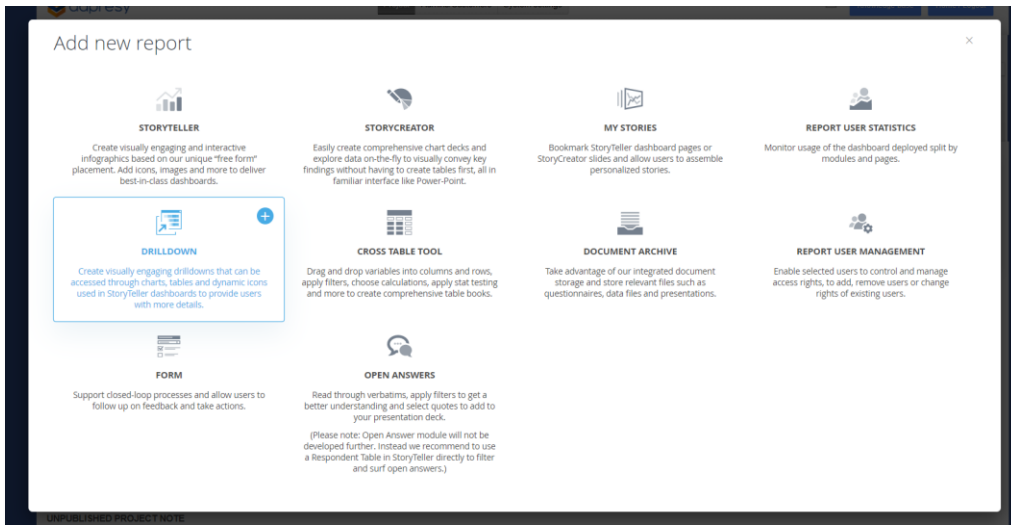


Tip 2; the “Add new report” button besides the Save button can be used as a dropdown list by clicking the arrow or as a link to popup page from where you select which report to be added by clicking the “Add new report” label

The dropdown list option:

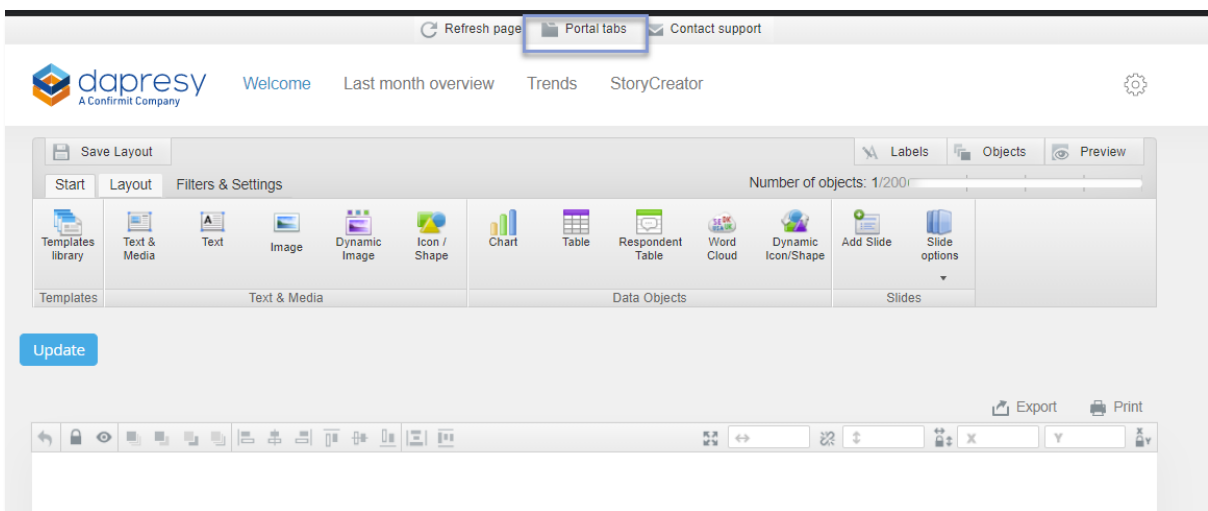


Here we see the popup page for report creation:



Tip 3; The new Portals tab page is also available from report preview which means that you don't need to go back to administration mode to add new reports, rename reports etc. during report setup. Click the Portals tab button at the top of the page to enter it.

Here we see how to enter the Portal tabs page from preview mode.

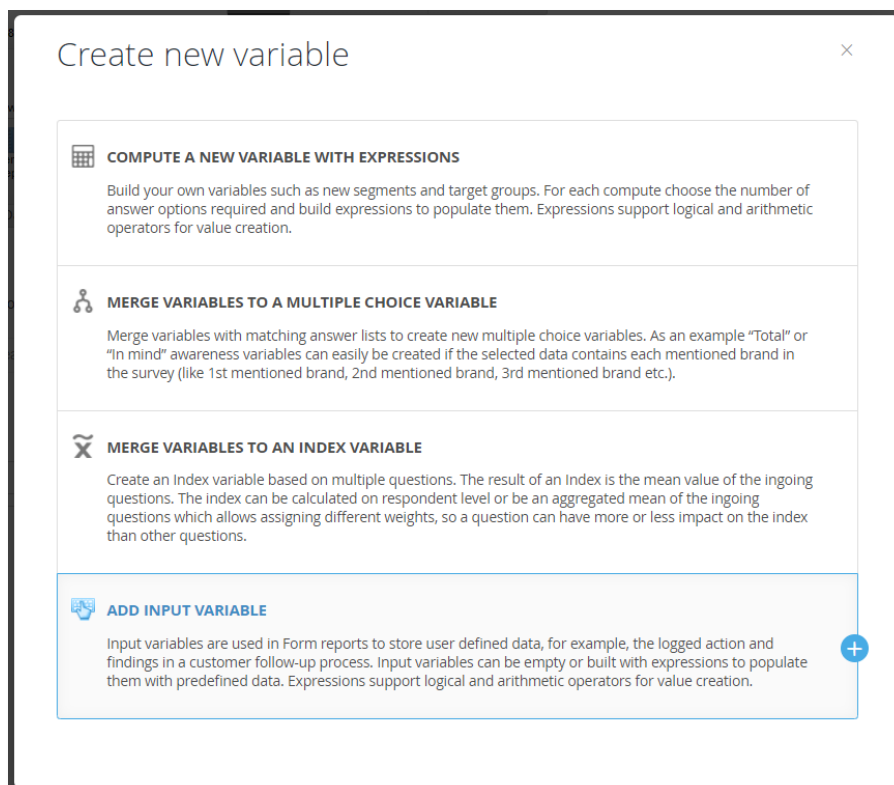


4 Questions page updates

4.1 Support for creating and editing Input variables

Input variables can now be created and edited from the new Questions page with same logic as computes, merged and index variables are managed in the same page.

The new Input variable option is shown last in the Create variable panel, see below.



4.2 Preview of Answer block

The Answer block of a question can now be previewed directly in question grid which gives a better overview of the questions in the project.

Preview of an Answer block in the question grid. Click any answer to edit and the Answer block view is shown.

ORDER	CODE	TEXT	TYPE	COLOR	ANSWER BLOCK	FILTER	FILTER TEXT
1	BgCurrentOp	Current operator	Single	Orange	Dapresy Telecom/Four/Swedish Telecom	Y	
2	BgSubscrType	Prepaid or Postpaid	Single	Blue	Prepaid/Postpaid	Y	
3	BgAgegroup	Age group	Single	Purple	15-24/25-34/35-44	Y	
4	BgGender	Gender	Single	Green	Man/Woman	Y	
5	Bgincome	Household Income	Single	Red	Less than 25 000 Euro/25 000-35 000 Euro/35...	Y	
		ID	ANSWER TEXT				
		1	Less than 25 000 Euro				
		2	25 000-35 000 Euro				
		3	35 001 - 45 000 Euro				
		4	45 001- 55 000 Euro				
		5	55 001- 64 000 Euro				
		6	More than 65 000 Euro				
6	BrAwaToM	Spontaneous brand awareness - Top of mind	Single	Blue	Dapresy Telecom/Four/Swedish Telecom	Y	
7	BrAwaInM	Spontaneous brand awareness - In mind	Multi	Blue	Dapresy Telecom/Four/Swedish Telecom	Y	
8	AdRecToM	Spontaneous advertising awareness - Top of...	Single	Yellow	Dapresy Telecom/Four/Swedish Telecom	Y	
9	AdRecInM	Spontaneous advertising awareness - In mind	Multi	Black	Dapresy Telecom/Four/Swedish Telecom	Y	

4.3 Preview of Compute-, Merged- and Index expressions

The content of created variables such as computes and index variables can now be previewed directly in question grid which, previously you had to enter the edit mode of for example a computed variable to see the expressions of each answer.

Here we see preview of expressions in a compute in the question grid.

ORDER	CODE	TEXT	TYPE	COLOR	ANSWER BLOCK	FILTER	FILTER TEXT
2	BgSubscrType	Prepaid or Postpaid	Single	Blue	Prepaid/Postpaid	Y	
3	BgAgegroup	Age group	Single	Purple	15-24/25-34/35-44	Y	
4	BgGender	Gender	Single	Green	Man/Woman	Y	
5	Segments	Segments	Scale	Red	Segments	Y	
		ID	ANSWER TEXT		EXPRESSION		
		1	Segment A		03-Age group=(1 - 15-24,2 - 25-34,3 - 35-44)0 AND 02-Prepaid or Postpaid=(1 - Prepaid)0 AND 05-Household Income=(1 - Les...		
		2	Segment B		03-Age group=(1 - 15-24,2 - 25-34,3 - 35-44)0 AND 05-Household Income=(5 - 55 001- 64 000 Euro,6 - More than 65 000 Euro)0		
		3	Segment C		05-Household Income=(4 - 45 001- 55 000 Euro,5 - 55 001- 64 000 Euro,6 - More than 65 000 Euro)0 AND 02-Prepaid or Postp...		

4.4 Preview of Grouped answer expressions

The content of a Grouped answer can now be previewed directly in Answer grid from the answer block page, previously you had to enter the edit mode of the Grouped answer to see how it was built.

Here we see preview of a Grouped answers in the Answer block grid. To edit the Grouped answer click any answer and the Grouped answer edit view is shown.

Cons.1 - Brand Consideration - Dapresy Telecom

Save Create grouped answer View questions connected to this Answer block

Select All Search and Replace texts Value sorting Neg/Neu/Pos Answer color Sort Answers

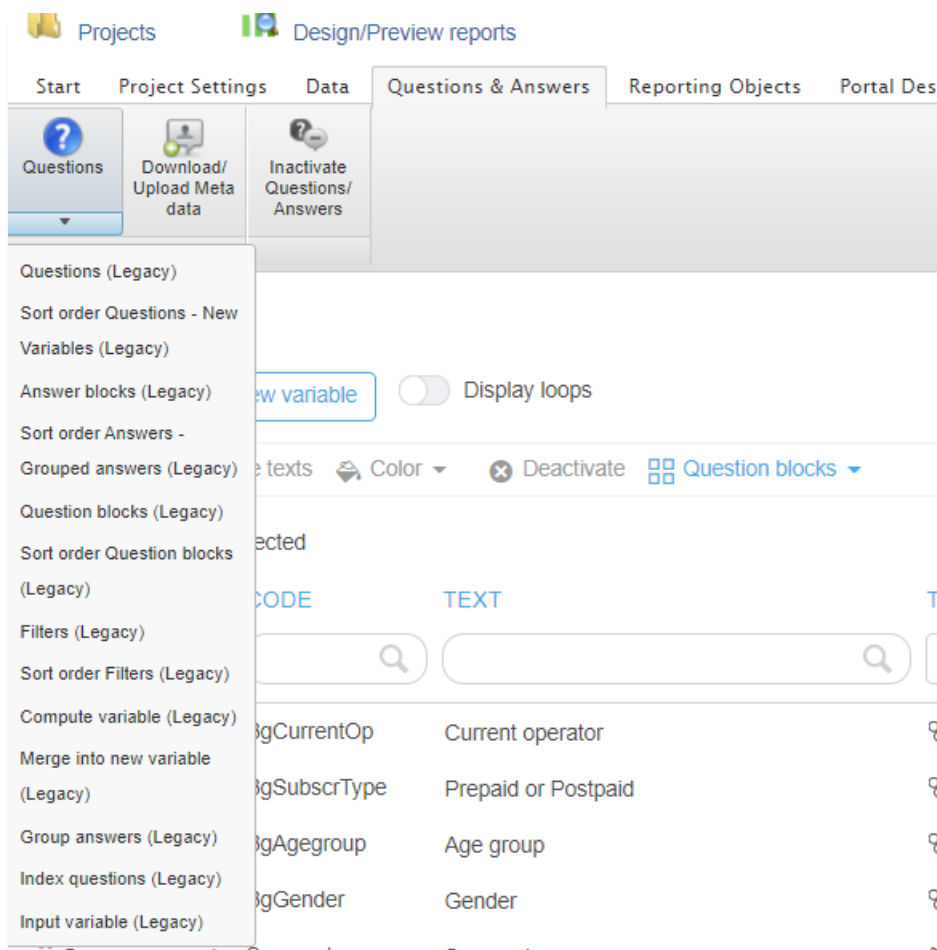
Search and Replace text

ORDER	ANSWER TEXT	ID	COLOR	VALUE SORTING						
1	1 Not at all likely	1	Orange	Sortable group 1						
2	2	2	Blue	Sortable group 1						
3	3	3	Purple	Sortable group 1						
4	4	4	Green	Sortable group 1						
5	5 Very likely	5	Red	Sortable group 1						
6	Don't know	6	Blue	Sortable group 1						
7	Bottom 2	100001	Red	Sortable group 1						
<table border="1"><thead><tr><th>ID</th><th>ANSWER TEXT</th></tr></thead><tbody><tr><td>1</td><td>1 Not at all likely</td></tr><tr><td>2</td><td>2</td></tr></tbody></table>		ID	ANSWER TEXT	1	1 Not at all likely	2	2			
ID	ANSWER TEXT									
1	1 Not at all likely									
2	2									
8	Top 2	100002	Green	Sortable group 1						

4.5 Older pages moved from main menu to sub-menu

The older pages for creating and maintaining Computes, Inputs, Merged and Index variables are now removed from main administration menu as full support now is available in new Questions page.

Where to find the old pages in the sub-menu, these old pages will be retired eventually:



5 StoryTeller

5.1 Anonymity limit support in Respondent tables

Anonymity limits support is now available in Respondent tables in order to support suppressing results if there are too few respondents or comments based on defined thresholds.

The limit can either be based on **number of shown respondents** or the **number of respondents in the current filter selections** or a combination of both.

Example, below we see a table displaying 8 comments, the applied filter combination generated 12 respondents but 4 respondents did not have data in the current variable so 8 rows are displayed only.

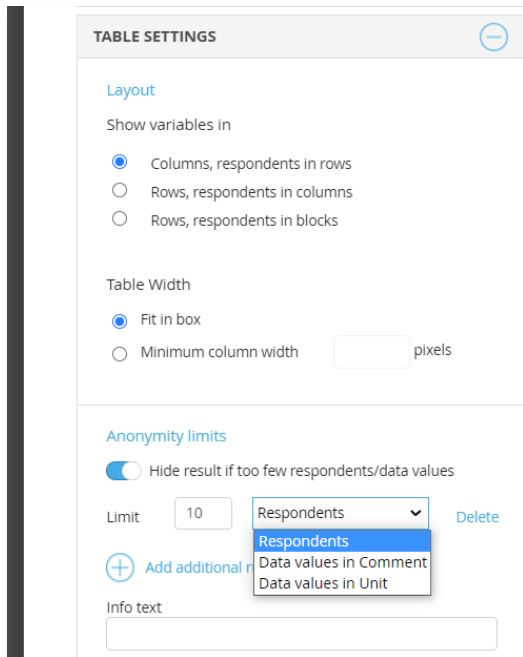
If the anonymity limit now is set to 10 and based on **number of comments** the result will be hidden but if the limits is based on **number of respondents in the filter combination** the result is shown.

Comment
Lorem ipsum dolor sit amet
Et harum quidem rerum facilis est et expedita distinctio.
Temporibus autem quibusdam et aut officiis debitis aut rerum necessitatibus saepe
taque earum rerum hic tenetur a sapiente delectus
Nam libero tempore, cum soluta nobis est eligendi
Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."
Temporibus autem quibusdam et aut officiis debitis aut rerum necessitatibus saepe
Duis aute irure dolor

5.1.1 Setup

The anonymity limits in the Respondent table are found in the Table settings panel in the Settings tab as shown below.

Here we see anonymity limit setup in the Respondent table.



The dropdown list above contains the options “Respondents” + the variables used in the Respondent table.

- If the “Respondents” option is selected the number of respondents in current filter combination must be equal to or higher than the defined limit to display the result.
- If any variable is selected the number of data values in the selected variable must be equal to or higher than the defined limit to display the result.

By clicking “Add additional rule” you can also specify more advanced rules. Below we see an example where the result only will be shown if there are 20 or more respondents in the current filter combination and minimum 5 comments.

An example when the anonymity limits are based on two rules, both must be fulfilled in order to display the result:

Anonymity limits

Hide result if too few respondents/data values

Limit Respondents

Limit Data values in Comme

Use the "Info text" field to add an information text to be shown for the users when the result has been suppressed. The info text will be centered positioned in the first result row column and use the styling of the same row, see example below.

An example of the info text appearing when result is hidden.

TABLE SETTINGS

Layout

Show variables in

- Columns, respondents in rows
- Rows, respondents in columns
- Rows, respondents in blocks

Table Width

- Fit in box
- Minimum column width pixels

Anonymity limits

Hide result if too few respondents/data values

Limit Respondents

Limit Data values in Comme

Info text

Unit	Comment
Result is hidden due to low base size	

ROWS & COLUMNS

Display header	Custom title	Title Text	Allow search	Format	Show thousand separators
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unit	<input checked="" type="checkbox"/>	Answer Text	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Comment	<input checked="" type="checkbox"/>		<input type="checkbox"/>

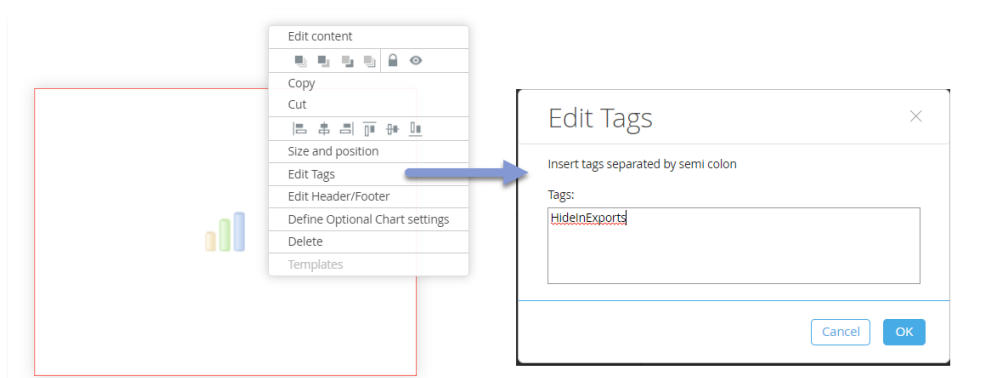
5.2 Tag support for streamlined custom code

An object level tag concept is introduced which simplifies usage of custom JavaScript and CSS code to be applied to StoryTeller objects. The CSS and JavaScript selectors in the custom code can now reference the tags of the objects instead of the object ids which makes the custom code easier to write, easier to apply to multiple objects and also the custom code is applied to copied objects automatically as the tags are included in the new copy.

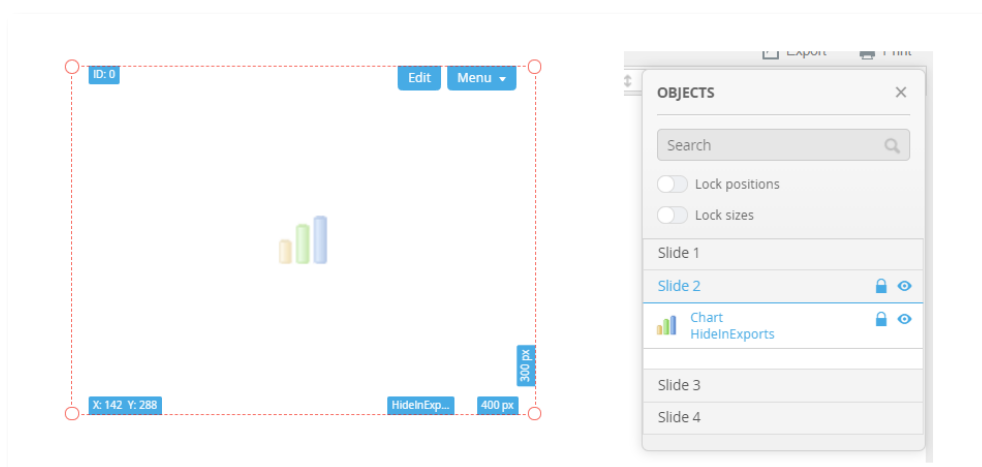
5.2.1 Setup

To tag a StoryTeller object open the tag view, via the context menu, and enter the desired tags.

Here we see how to tag an object.



The tags are also shown in bottom left corner when object is selected as shown to the left below and also in the Object panel as shown to the right below.



6 Respondent level Event emails

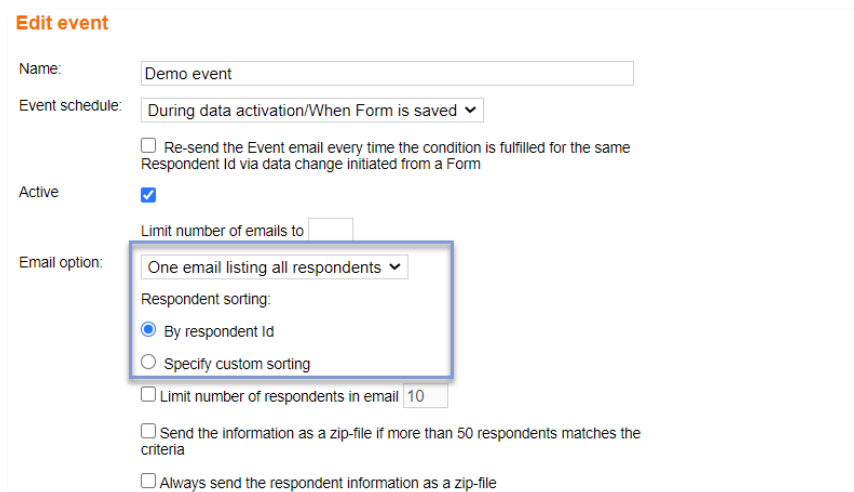
6.1 Specify sort order of respondents in Event emails

When the Respondent level Event email includes all alerted respondents in a single email you can now specify the sort order of the respondents so most relevant respondents are shown first. The sorting can be based on multiple levels so, as an example, respondents with lowest recommendation score in most important customer class is shown at the top of the email to help the user the act on most relevant cases first.

6.1.2 Setup

The new sort order setting is shown in the Event setup page when the option “One email listing all respondents” is selected as shown in the image below. The respondents are sorted by the respondent id by default, to apply a custom sort order select the “Specify custom sorting” option as shown in second image below.

Here we see default settings when all respondents are listed in the same email, the respondents are sorted by the respondent id.



The screenshot shows the 'Edit event' configuration page. The 'Event schedule' is set to 'During data activation/When Form is saved'. The 'Active' checkbox is checked. The 'Email option' is set to 'One email listing all respondents'. Under 'Respondent sorting', the 'By respondent Id' radio button is selected. Other options include 'Specify custom sorting', 'Limit number of respondents in email' (set to 10), 'Send the information as a zip-file if more than 50 respondents matches the criteria', and 'Always send the respondent information as a zip-file'.

Here we see example of custom sorting, in this case the respondents are sorted by the recommendation score and customer class.

Edit event

Name:

Event schedule:

Re-send the Event email every time the condition is fulfilled for the same Respondent Id via data change initiated from a Form

Active

Limit number of emails to

Email option:

Respondent sorting:

By respondent Id

Specify custom sorting

Limit number of respondents in email

Send the information as a zip-file if more than 50 respondents matches the criteria

As shown in the image above the sorting can be based on multiple variables, additional sorting levels are added via the “Add level” button.

The sorting can be based on the following variable types: single choice, open ended (strings), numeric and date variables.

The sorting cannot be based on multi choice and index variables. Grouped answers in single choice variables are not considered either, the sorting is based on the original answers only.

Note, when the sorting is based on single choice categorical questions the sort order id of each answer is used and not the answer labels.

Here we see the sort order id, in the Answer block view, which is used in the Event sorting.

ORDER	ANSWER TEXT	ID	COLOR	VALUE SORTING
1	Key accounts	1	Orange	Sortable group 1
2	All other accounts	2	Blue	Sortable group 1

6.2 Pause Event emails and Response date limits now included in Excel file for Report user bulk updates

The Report user level Events related settings Pause Event emails and Response Date limits are now included in the Excel file for bulk create/edit Report users which makes bulk updates of Report users more efficient.

Here we see these settings in the user interface for, these settings were previously not included in the Excel file used for bulk create/edit users.

6.2.1 Setup

The Pause Events emails and Response date limit columns are included in the Excel file if the project contains Respondent level Events, if the project contains Aggregated Events only the Excel file contains the Pause Event emails column only.

Here we see the two new columns in column M and N. Yes/No is used in the Pause event email column and the Response date limit contains is date cell.

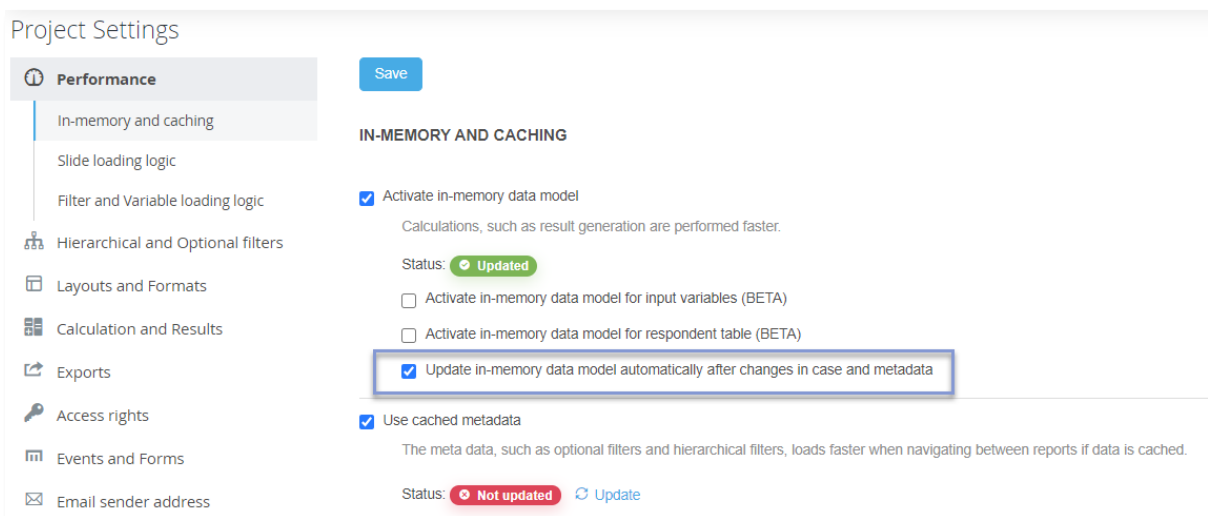
	A	J	K	L	M	N	O
1		object Access		Reports		Respondent based Events	
2	User name	Last Date for Access	2 - Welcome	Default report	Pause event Emails	Response date limit	E1 - Alerts
3	John.Olofsson@dapresy.com		Access	0 - --First Report--	No	2020-12-08	Access

7 Auto-update of in-memory data model

You can now apply a new setting so the in-memory data model updates automatically when required due to updates in administration pages like changes in Questions page, newly created computed variables etc. By using the new auto-update logic it becomes more efficient to work in the administration page as manual in-memory data model updates are not needed. Though, it is not recommended to use the auto-update option in projects with a huge amount of data as that could result in longer loading times when saving any change that requires an update of the in-memory data model.

You can find the new setting in the new Project settings page in the In-memory and caching page.

Here we see the new setting. If you notice long loading times when, for example, saving the new computes, clicking Save in the Questions page etc. you should turn the option off and make manual updates when required.



The screenshot shows the 'Project Settings' interface. On the left is a sidebar with 'Performance' selected, containing sub-items like 'In-memory and caching', 'Slide loading logic', 'Filter and Variable loading logic', 'Hierarchical and Optional filters', 'Layouts and Formats', 'Calculation and Results', 'Exports', 'Access rights', 'Events and Forms', and 'Email sender address'. The main content area is titled 'IN-MEMORY AND CACHING' and includes a 'Save' button. It features several settings: 'Activate in-memory data model' (checked, status 'Updated'), 'Activate in-memory data model for input variables (BETA)' (unchecked), 'Activate in-memory data model for respondent table (BETA)' (unchecked), 'Update in-memory data model automatically after changes in case and metadata' (checked, highlighted with a red box), and 'Use cached metadata' (checked, status 'Not updated' with an 'Update' button).

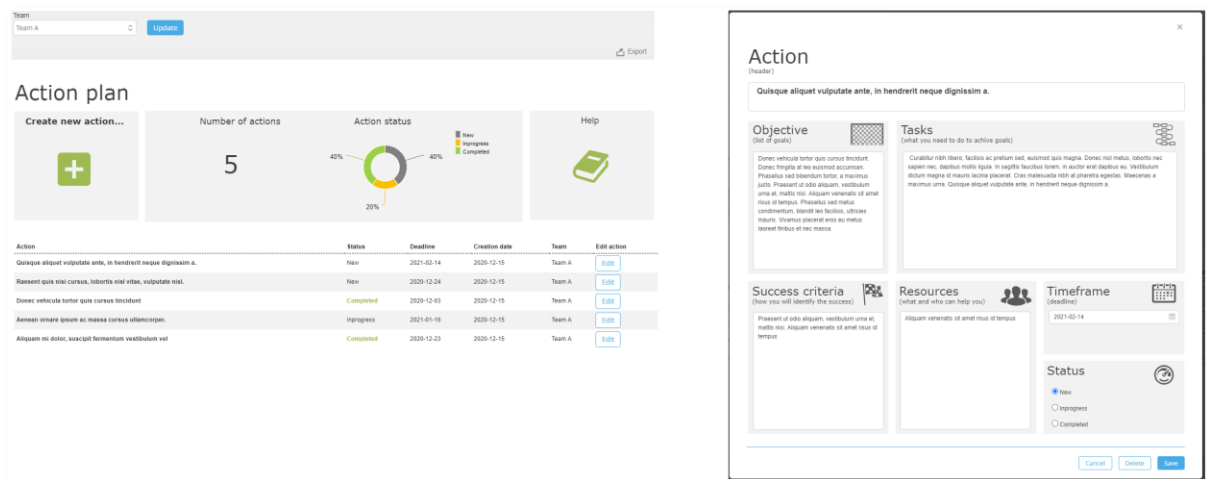
8 Unit level action planning

Unit level Action planning, also known as strategic action planning, is now supported which allows creating and connecting actions to organizational units (hierarchical filter nodes) or other types of segments, service lines, target groups etc. (optional filters). Unit level action planning were previously not supported as the actions always were connected to the uploaded respondents (case action management).

As the new unit action plan support is an improvement of the current case management process the flow is built on Input variables, Forms, Event emails and StoryTeller reports which makes the action plan process customizable based on the customer needs. What input is required in action forms, how escalation processes and email reminders shall be used is flexible. Corporate layouts can also be applied to the action forms.

Aggregated action statistics can be reported in, for example, StoryTeller dashboards in order to analyze number of open actions in different areas, number of delayed actions etc.

This is an Action plan example. The StoryTeller (the image to the left) lists all the current actions in a Respondent table and a few data objects show the action related statistics of the selected Team. The Form report (image to the right) is used for creating and editing actions.



8.1 Setup process overview

The unit level actions are stored like regular uploaded survey data, when a new unit level action is created the system creates a new action-respondent used to store the

data of the new action. Thanks to that the setup process of the unit action planning is nearly identical to the setup process of the respondent level action planning.

The difference between the setup of the unit- and the respondent level action planning is the “create new action” item in the StoryTeller report, the rest of the process is the same. In chapter 8.2 you see how to setup the “Create new action” link in the StoryTeller, to see how to setup Forms, Input variables etc. check the online Knowledge base. In chapter 8.3 you see how these system level created action-respondents can be deleted, how these are affected by the data activation, raw data exports etc. In chapter 8.4 you see how to handle “response” dates on action respondents in Event emails to avoid sending out “old” Event emails for newly created Report users in ongoing projects.

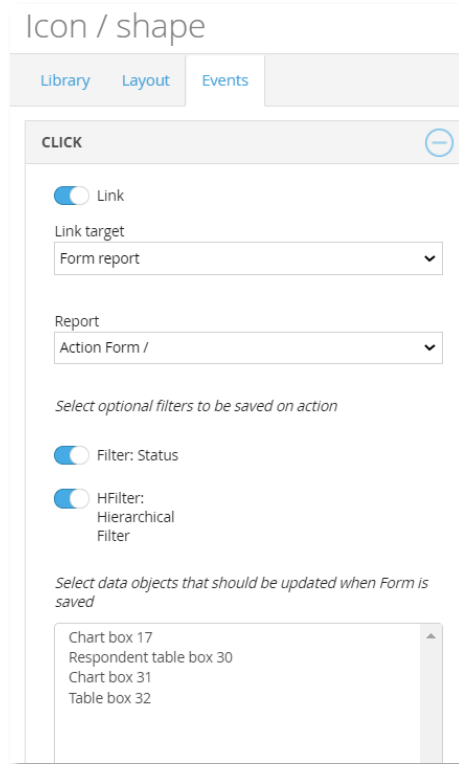
8.2 Setup of “Create new action” link in StoryTeller

To add support for creating action from StoryTeller you first need to add the Form report used for entering the action details and then you can add a “Create action” link in a StoryTeller report. The “Create action” link can either be a Text object or an Icon object which is linked to the Form report.

To add a “Create action” link to a StoryTeller report do as the following:

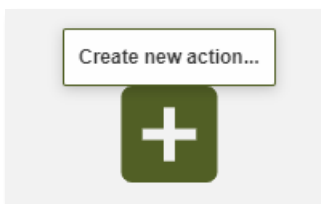
- In your StoryTeller report, add the Text/Icon object the users should click to create a new action
- In the “Events” tab in the Text/Icon object (see image further down):
 - In “Click” panel enable the “Link” option
 - In “Link target” list select the “Form report” option
 - In “Report” list select the Form to be used for entering the actions
 - In “Select optional filters to be saved on action” select if any of the optional filter selections (including hierarchical filters) should be saved on the action respondent. You can only choose from the Optional filters that are active in the StoryTeller
 - Select which data objects, in the current StoryTeller, to be refreshed when the users saves an action. In general, all the data objects displaying action related data needs to be refreshed to show the latest action result after a new action has been created. Data objects not displaying action data do not need to be refreshed as these results are not changed when a new action is added, or an action is changed

Here we see the setup of an “create action” link in an Icon object in the StoryTeller.



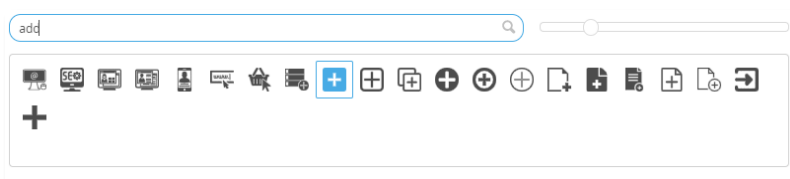
Tip, you can also enable the tooltip on hover to for example display a “Create new action” label when the user hovers over the create action icon.

Here we see an example of an added tooltip.



Tip 2, search for “Add” in Icon library and you will find appropriate icons to use for creating actions.

Here we see the “Add” icons available in the Icon library.



8.2.1 Action respondents and response date

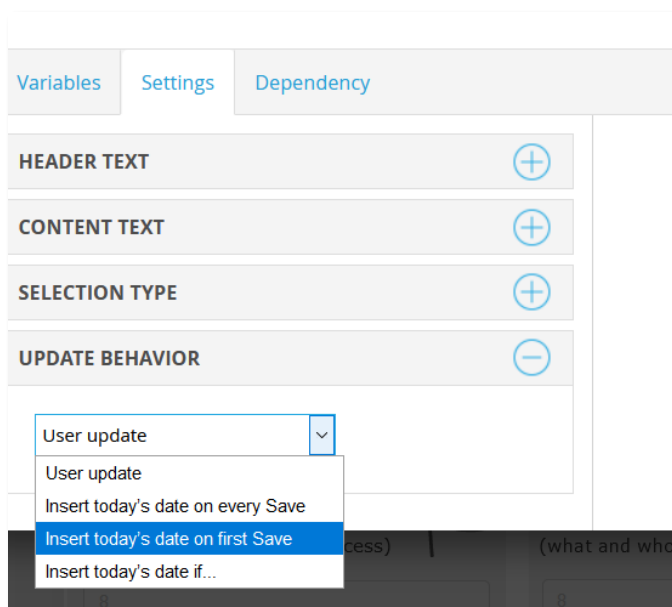
In order to report on the action respondents, you should include at a minimum one Input date variable in the action Form, so each action respondent has a “Response” date. This Input date variable should then be set as a Response date variable in the project and applied to all data objects displaying action data.

Why? The action respondents will get no date value in the uploaded/default response date variable(s) and all respondents must have a “Response date” in order to be included in any data object.

With this logic the action respondents are always excluded from all data objects displaying survey data results and vice versa as they do not have date values in the same date variables.

Good practice is to add a “Action created” date by creating a Date input variable which you add to a Data field in the Form and apply the setting shown in the image below. With this logic each action respondent gets an action created date which you use as Response date in all data objects.

The option to be used in the Data field, in the Form, to get an “Action created” date.



8.3 Action data

In the following chapters you can read about what data is stored on the action respondents, how the action respondents are affected by raw data exports, data activations, data cleaning etc.

8.3.1 Actions connected to Optional filters/Hierarchical filters

As described in previous chapter the Optional and Hierarchical filters selected by the user can be saved on the action in order to connect the action to a specific unit, filter etc. Below you see what data will be saved when the action is connected to the hierarchy, what happens if the Optional filter is a Computed variable or contains Grouped answers.

Hierarchical filters

When the hierarchical filter nodes selection is saved on the action the action is connected to the selected node and all the nodes further up in the structure (parent, parent-parent, etc.).

Example; the hierarchy structure looks like below. If now "Team X" is selected and an action created the action will belong to Team X, Sweden and Total.



Data will also be saved on the variables building the hierarchical structure for a more flexible reporting. In the example above the hierarchy was derived from the Country and Team variables so when the action is saved on Team X in the hierarchy it will also be saved to Sweden in Country variable and Team X in Team variable.

Note: If multi-select is supported in the hierarchical filter in the StoryTeller the action will be connected to all the selected units. If this should not be allowed, make sure single selection is used in the hierarchical filter in the StoryTeller report.

Optional filter variable with Grouped answers

If an Optional filter variable to be saved on the action contains grouped answers the action is saved on the selected item only, a created action will not be connected to an item not selected by the user. See example below.

Example: Country is used as an Optional filter and contains the following answer options:

- Denmark - regular answer
- Germany - regular answer
- Norway - regular answer
- Sweden - regular answer
- Nordic - a Grouped answer based on Denmark, Sweden and Norway

If the user selects Sweden and creates an action it will be connected to Sweden only and not to the grouped answer Nordic.

If the user selects Nordic and creates an action it will be connected to Nordic only, the action will not be connected to the individual items building the grouped answer (Denmark, Norway and Sweden).

Optional filter variable based on Computed variables

If the Optional filter variable to be saved on the action is a computed variable the action is saved on the selected item, see example below.

Example: Country is a computed variable with two answer options and used as Optional filter,

- Sweden - based on a City variable =Stockholm and Norrköping.
- Germany - based on a City variable = Berlin and Hamburg

If the user selects Sweden and creates a new action the action will be saved on Sweden in the computed variable only, the action is not connected to Stockholm and Norrköping in the City variable.

8.3.2 Action respondents not effected by computed variables

Action respondents are never processed when computing new variables, indexes or merged variables or grouped answers.

Example: a variable storing country is used as an optional filter and the selection is saved on the action. If you now create a new computed variable based on the Country variable the action respondents will not be processed, only the survey respondents will be processed and get data in the newly created computed variable.

Note: like in the respondent level action planning process action respondent are processed when Input variables are based on other Input variables.

Example: in the action Form you have a Status Input variable with the options "New", "In progress" and "Completed". If you now create a new Input variable based on the Status Input variable the action respondents will be processed and get data in the new Input variable.

8.3.3 Data recoding

Action data stored on non-input variables, which happens when hierarchical and Optional filters have been saved on the action, is affected recoding and cleaning.

Example: a Team variable is used as Optional filters and contains the answer options Team A, Team B and Team C. If Team B is recoded to Team A this change will affect both the survey respondents and the action-respondents meaning that all actions connected to Team B now are connected to Team A.

8.3.4 Raw data exports

The Action data is not included in any raw data export. If you have a need to export action related data use a Respondent table in a StoryTeller and you can export to Excel or csv.

8.3.5 Delete action data

The Action respondents can be deleted either one by one via the Form, when an action is opened in Edit mode, or you can delete all actions in a project in the Delete case data page.

The delete action option in bottom right corner when an Action shown in edit view. Both Administrator users and Report users can use this delete option.

Action
(header)

Quisque aliquet vulputate ante, in hendrerit neque dignissim a.

Objective
(list of goals)

Donec vehicula tortor quis cursus tincidunt. Donec fringilla at leo euismod accumsan. Phasellus sed bibendum tortor, a maximus justo. Praesent ut odio aliquam, vestibulum urna et, mattis nisi. Aliquam venenatis sit amet risus id tempus. Phasellus sed metus condimentum, blandit leo facilisis, ultricies mauris. Vivamus placerat eros eu metus laoreet finibus et nec massa.

Tasks
(what you need to do to achieve goals)

Curabitur nibh libero, facilisis ac pretium sed, euismod quis magna. Donec nisi metus, lobortis nec sapien nec, dapibus mollis ligula. In sagittis faucibus lorem, in auctor erat dapibus eu. Vestibulum dictum magna id mauris lacinia placerat. Cras malesuada nibh at pharetra egestas. Maecenas a maximus urna. Quisque aliquet vulputate ante, in hendrerit neque dignissim a.

Success criteria
(how you will identify the success)

Praesent ut odio aliquam, vestibulum urna et, mattis nisi. Aliquam venenatis sit amet risus id tempus

Resources
(what and who can help you)

Aliquam venenatis sit amet risus id tempus

Timeframe
(deadline)

2021-02-14

Status

New
 Inprogress
 Completed

Cancel Delete Save

The delete all actions option in the Delete case data page.

Start Project Settings Data Questions & Answers Reporting Objects Portal Design Users

Import data Activate data Generate reports Delete Meta data Delete Case data Export Case data Data Cleaning/ Recoding Reference Data Import / Activation

Import Data Generate Meta Data Case Data Reference Data

Delete Case Data

Delete belonging input variable data Delete all inactivated input variable data Delete all action data

Delete all selected data

<input type="checkbox"/>	Import ID	Data batch	File Name	File Format	Imported Date	
<input type="checkbox"/>	2	2.0	Dapresy telecom spssbas JAN-FEB.sav	SPSS	2020-12-15 22:01	Delete

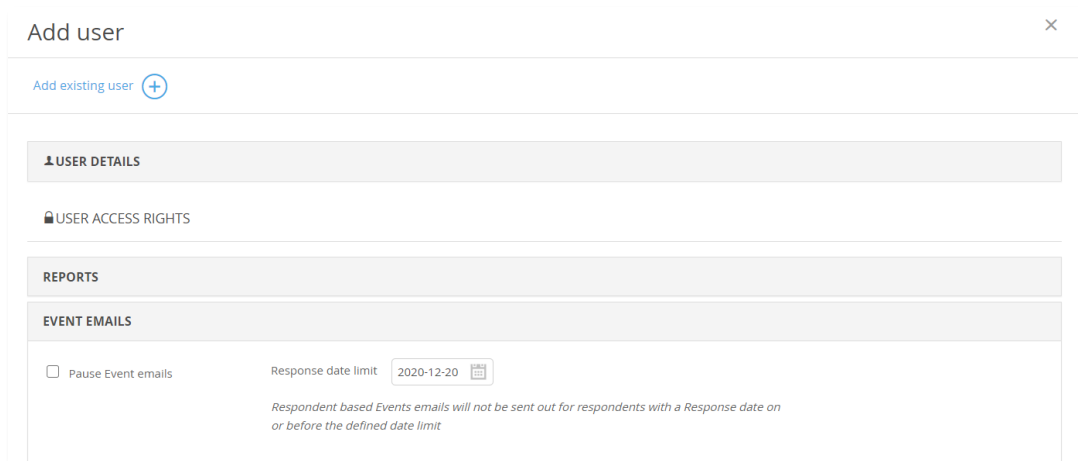
8.3.6 Action data always activated

The Action data is always activated, action related data is not shown in the Data activation page and is not affected by any data activation.

8.4 Action respondents and Event emails

In the create/edit Report users page you can limit the Event emails by a date to avoid sending out old event emails when a user is added in an ongoing project.

Here we see this option in the Report user creation page. If the “Response date limit” is set to 2020-12-20, like in the image below, no event emails will be sent out to this user for respondents with a lower response date even if they fulfil the trigger criteria.



The screenshot shows a modal window titled "Add user" with a close button (X) in the top right corner. Below the title is a link "Add existing user" with a plus icon. The form is divided into several sections: "USER DETAILS", "USER ACCESS RIGHTS", "REPORTS", and "EVENT EMAILS". In the "EVENT EMAILS" section, there is a checkbox labeled "Pause Event emails" which is unchecked. To its right is a label "Response date limit" followed by a date input field containing "2020-12-20" and a calendar icon. Below this, a small note reads: "Respondent based Events emails will not be sent out for respondents with a Response date on or before the defined date limit".

For the regular uploaded survey respondents the default Response date variable is used for checking if a respondent should be included in the Event emails based on the “Response date limit” of the Report user.

For the action respondents you should specify which input date variable to be used for checking the dates as action respondents do not have a “default” response date variable (an action respondent can have one or several dates depending on the Form set up like action created date, last update date, target date etc.).

Which input date variable to be used for checking the action respondent date is defined in the new Project settings page in the Events and Forms sub-page.

9 Reference data

The new Reference data module allows you to compare survey results to external benchmark values such as internal targets, industry means, best in class benchmarks etc.

The Reference data is stored separately within the project from the survey data and uploaded in a “reference data” friendly format. The reference values are connected to the question and answers in the project for an automated reporting process and can also be connected to the hierarchical filter units and other filters in order to compare survey results to the most relevant reference data.

The reference data can be used in the StoryTeller report and visualized in charts and tables on its own or you can visualize differences between the survey result and the reference data.

It is also supported to use percentiles in the reference data to for example calculate a percentile ranking result which is common in employee research.

A Category and Filter sets concept allows importing multiple types of reference values into the same project, as an example you can include reference values for “Best in class” and “Industry means” and let the Report user select which of these benchmarks to be used in the reporting

Example of a basic dashboard with reference data comparison, the left chart shows the mean values of the survey attributes and right the difference to the uploaded reference data.

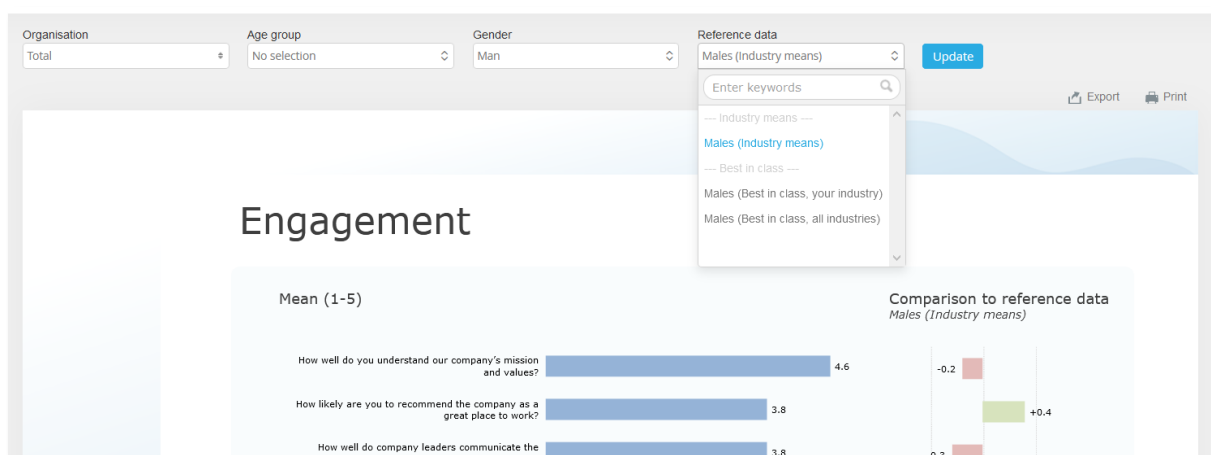


In chapter 9.1 you can read about how reference Categories and Filter sets can be used to structure the reference data and in chapter 9.2 how to import and report on reference data.

9.1 Categories and Filter sets

A Categories and Filter sets concepts allows you to import multiple types of reference data into the same project. Example of Categories could be “Best in class” and “Industry means” and within each of these categories you can have reference data for different Filter sets if there is reference data available for different filter combinations.

Report user view, as shown the user can now either select to compare the survey result to a “Industry mean” or two different “Best in class” benchmarks.



So, a Category is a group of Filter sets while a Filter set contains reference values for a certain filter or filter combination which can include hierarchical filters.

In the StoryTeller reporting the Categories and Filter sets are always shown in a reference filter list. The Report users selects which reference data to be applied to the report. You can apply rules so different Filter sets are available to choose from based on which hierarchical filter and optional filter selections that are selected by the user to ensure that relevant Filter sets only are shown. You can read more about these rules in later chapters.

An example of how the available reference Filter sets changes when the gender selection is changed.

The image displays two screenshots of a web interface, illustrating how the available reference filter sets change when the gender selection is changed. Both screenshots show the same form with 'Organisation' set to 'Total' and 'Age group' set to 'No selection'. The top screenshot shows 'Gender' set to 'Man', and the 'Reference data' dropdown menu is open, displaying options: 'Males (Industry means)', 'Males (Best in class, your industry)', and 'Males (Best in class, all industries)'. The bottom screenshot shows 'Gender' set to 'Woman', and the 'Reference data' dropdown menu is open, displaying options: 'Females (Industry means)', 'Females (Best in class, your industry)', and 'Females (Best in class, all industries)'. Both screenshots include an 'Update' button.

9.2 Setup

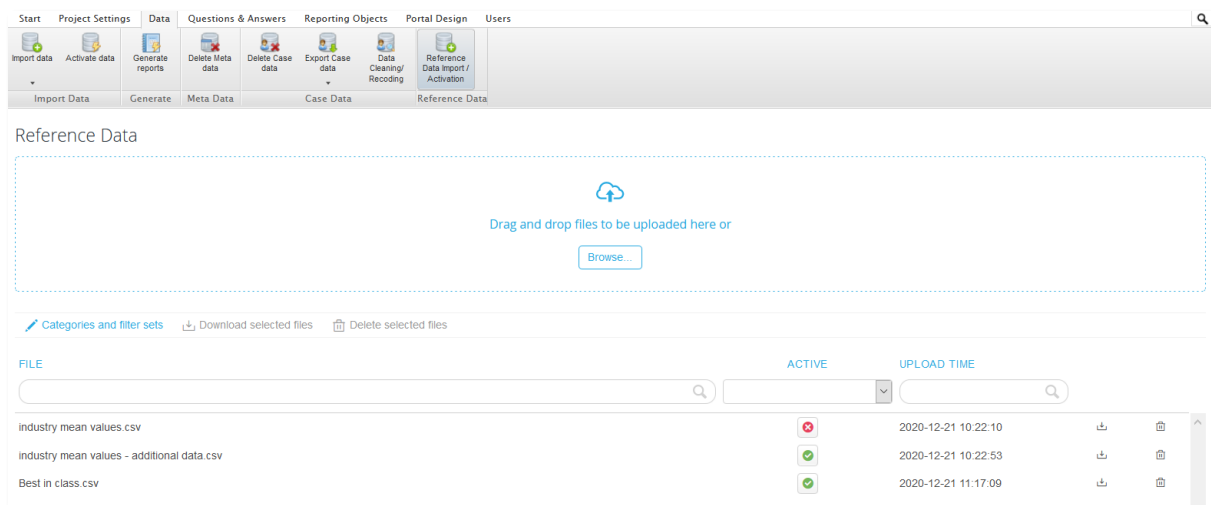
The reference data setup consists of two main steps:

- Importing the Reference data. Data is imported on a project level so the same set of reference data can be used in multiple StoryTeller reports. Read more about the data format and how to upload the data in chapter 9.2.1
- Reporting on the uploaded reference data in the StoryTeller, see chapter 9.2.2

9.2.1 Importing Reference data

The reference data uploads are made in a new Reference data page in the administration menu as shown below.

The new Reference data page.



Below you see how to work in the new screen, the file format to be used is described in chapter 9.2.1.1

Upload data

Select the file(s) to be uploaded via the Browse button or the Drag and Drop function. After file selection click “Start upload” to start the upload and the file validation. If any errors are found the upload stops and the file needs to be corrected.

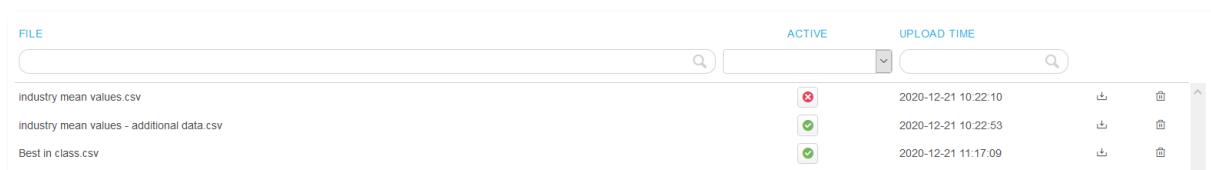
Note, it is recommended to zip the files for a faster upload.

Activate data

You decide which of the uploaded data files to be used in the reporting by activating the files to be used, click Activate/Deactivate icons in the Active columns. Deactivated files are not used in reporting.

Note: the survey meta data needs to be imported before you activate the reference data as the system maps the ids of the questions and answers in the reference data against the ids in the survey meta data.

Here we see that only two of the uploaded data sets are activated and will be used in the reporting.



Delete uploaded data

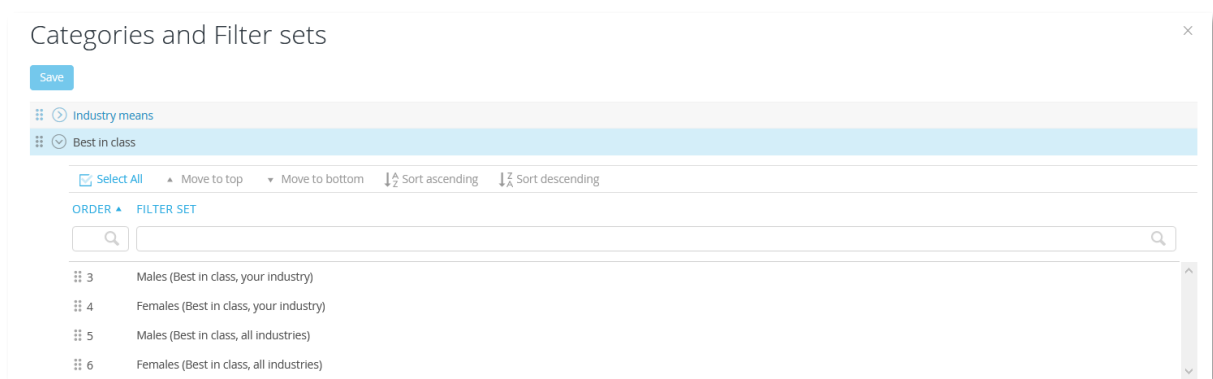
Only inactive files can be deleted, an active file cannot be deleted.

It is recommended to delete unused data files.

Categories and Filter sets

A Categories and Filter sets panel can be opened from the toolbar and here you see all the Categories and Filter sets from the activated reference data files. From here you can also update the sort order of the Categories and Filter sets if these should be shown in a specific order for the Report users in the reference filter list in the StoryTeller.

The Categories and Filter sets panel. Change the sort order by drag and drop or by entering the desired sort order number in the Order column or alternatively by using the alphabetical sort order function in the toolbar.



Note: all the Categories and Filter sets are default ordered by the order of imported data files.

9.2.1.1 File format

The reference data should be imported in CSV files and below you see an example of a file, further down you see more details. Use comma, tab, semicolon separated values in the csv file, the system detects automatically what is used during upload.

Example of csv reference data file opened in Excel, in this example the reference values are connected to the Age group and Gender filters (this data is used in the dashboards example in chapter 9).

	A	B	C	D	E	F	G	H
1	Category	Question id	Answer id	Calculation	Value	Filter set	Filter:BgGender	Filter:BgAgegroup
2	Industry means	Attr1.1		mean	4.8	Males (Your industry means)	1	
3	Industry means	Attr1.2		mean	3.4	Males (Your industry means)	1	
4	Industry means	Attr1.3		mean	4.1	Males (Your industry means)	1	
5	Industry means	Attr1.4		mean	3.6	Males (Your industry means)	1	
6	Industry means	Attr1.5		mean	3.9	Males (Your industry means)	1	
7	Industry means	Attr1.6		mean	3.7	Males (Your industry means)	1	
8	Industry means	Attr1.7		mean	3.3	Males (Your industry means)	1	
9	Industry means	Attr1.1		mean	4.9	Females (Your Industry means)	2	
10	Industry means	Attr1.2		mean	3.3	Females (Your Industry means)	2	
11	Industry means	Attr1.3		mean	4.1	Females (Your Industry means)	2	
12	Industry means	Attr1.4		mean	3.8	Females (Your Industry means)	2	
13	Industry means	Attr1.5		mean	3.7	Females (Your Industry means)	2	
14	Industry means	Attr1.6		mean	3.9	Females (Your Industry means)	2	
15	Industry means	Attr1.7		mean	3.5	Females (Your Industry means)	2	
16	Industry means	Attr1.1		mean	4.6	Males (All industries means)	1	
17	Industry means	Attr1.2		mean	3.3	Males (All industries means)	1	
18	Industry means	Attr1.3		mean	4.2	Males (All industries means)	1	

As shown above each row in the file contains a reference value connected to a Category, Question id, Answer id, calculation type and a Filter set (a filter combinations). The answer id column is used only when uploading reference values for Count or % on a categorical question.

Note, all the reference values to be used in reporting should be uploaded as there are no further aggregations of the reference value in the system. If, as an example, reference data should be available for a grouped answer such as a top 2 box (4+5) created in Dapresy you need to upload the reference data for the grouped answer even if you uploaded reference data for the answers 4 and the answer 5.

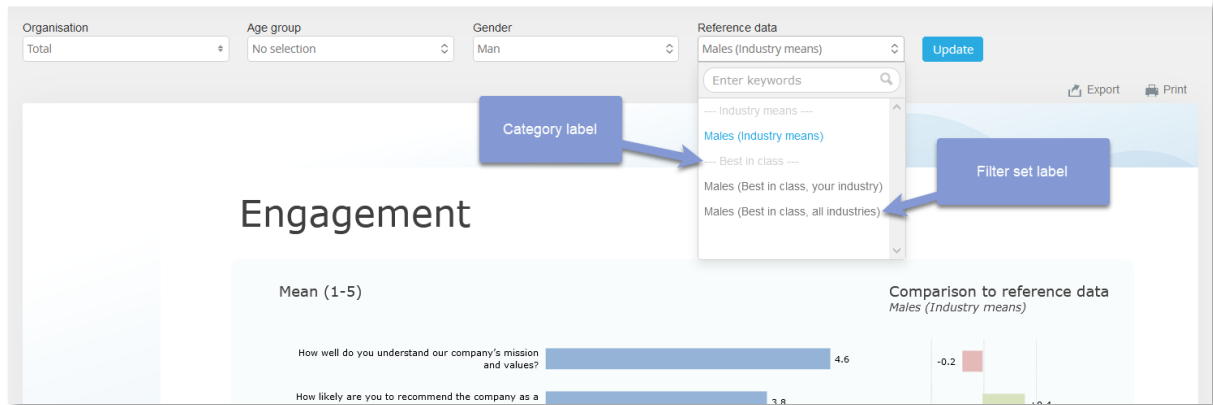
Below you see a more detailed explanations of the columns in the reference file, the order of the columns does not matter but the exact column names must be used.

Category

The name of the Category the reference value belongs to. The Category names are

displayed for the Report users in the StoryTeller reports so these should be user-friendly.

Here we see where the Category names are shown to Report users.



Question id

The id of the Question in the project the reference value should be connected to.

Note, in the project you find the question ids in the "Code" column in the Questions page. (NB Not the ID column in the Questions screen.)

Answer id

The id of the Answer alternative the reference value should be connected to in case of uploading reference data for % or counts on categorical questions.

Example of % reference data connected to answer 5.

	A	B	C	D	E	F	G
1	Category	Question id	Answer id	Calculation	Value	Filter set	Filter:BgGender
2	Industry means	Attr1.1	5 %		60	Males (Your industry means)	1
3	Industry means	Attr1.2	5 %		56	Males (Your industry means)	1
4	Industry means	Attr1.3	5 %		58	Males (Your industry means)	1
5	Industry means	Attr1.4	5 %		70	Males (Your industry means)	1
6	Industry means	Attr1.5	5 %		69	Males (Your industry means)	1
7	Industry means	Attr1.6	5 %		64	Males (Your industry means)	1
8	Industry means	Attr1.7	5 %		59	Males (Your industry means)	1

Note: in the project you find the Answer ids in the Id column in the Answer block page.

Filter columns

If the reference data should be connected to the hierarchical filter or any optional filters the reference file should contain a column per filter the data should be connected to.

The filter connections are used in the StoryTeller reporting to show relevant Filter sets based on what hierarchy and optional filters the user selects.

Optional filters: the column header should be “Filter:” followed by the question id of the filter variable, the ids of the filter answer options should be used in each row as shown in the example below.

Example of filter columns (column G and H) in the reference file for demonstrating purpose. As shown a Filter set can be connected to no filter (row 2-3), a filter (row 4-11) or a filter combination (row 12-15).

	A	B	C	D	E	F	G	H
1	Category	Question id	Answer id	Calculation	Value	Filter set	Filter:BgGender	Filter:BgAgegroup
2	Industry means	Attr1.1		mean	4.8	Total		
3	Industry means	Attr1.2		mean	4.2	Total		
4	Industry means	Attr1.1		mean	4.7	Males (All industries means)	1	
5	Industry means	Attr1.2		mean	3.4	Males (All industries means)	1	
6	Industry means	Attr1.1		mean	4.9	Females (All industries means)	2	
7	Industry means	Attr1.2		mean	3.3	Females (All industries means)	2	
8	Industry means	Attr1.1		mean	4.6	20-40 years (All industries means)		1
9	Industry means	Attr1.2		mean	3.3	20-40 years (All industries means)		2
10	Industry means	Attr1.1		mean	4.9	40-65 years (All industries means)	2	
11	Industry means	Attr1.2		mean	3.3	40-65 years (All industries means)	2	
12	Industry means	Attr1.1		mean	4.1	Males, 20-40 years (All industries means)	1	1
13	Industry means	Attr1.2		mean	3.8	Males, 20-40 years (All industries means)	1	1
14	Industry means	Attr1.1		mean	3.7	Females, 20-40 years (All industries means)	2	1
15	Industry means	Attr1.2		mean	3.9	Females, 20-40 years (All industries means)	2	1

Hierarchical filters: the column header should be named “Hfilter”, in the codes of the units shall be should be used in each row as shown in the example below.

Example of hierarchical filter column in the reference file for demonstrating purpose. In this example “Internal target” are uploaded and connected to each hierarchical unit.

	A	B	C	D	E	F	G
1	Category	Question id	Answer id	Calculation	Value	Filter set	Hfilter
2	Internal Targets	Attr1.1		mean	4.8	Company total	Htotal
3	Internal Targets	Attr1.2		mean	4.2	Company total	Htotal
4	Internal Targets	Attr1.1		mean	4.7	Business area 1	B.area1
5	Internal Targets	Attr1.2		mean	3.4	Business area 1	B.area1
6	Internal Targets	Attr1.1		mean	4.9	Team 1	B.area1Team1
7	Internal Targets	Attr1.2		mean	3.3	Team 1	B.area1Team1
8	Internal Targets	Attr1.1		mean	4.6	Team 2	B.area1Team2
9	Internal Targets	Attr1.2		mean	3.3	Team 2	B.area1Team2
10	Internal Targets	Attr1.1		mean	3.3	Business area 2	B.area2
11	Internal Targets	Attr1.2		mean	4.9	Business area 2	B.area2
12							

Above the Filter sets are connected to the hierarchical unit only but the Filter sets can also be connected to a combination of hierarchical and regular filters as shown below.

Example where Filter sets are connected to a combination of hierarchical and regular filters, here we see that Business area 1 have internal targets for two different countries.

	A	B	C	D	E	F	G	H
1	Category	Question id	Answer id	Calculation	Value	Filter set	Hfilter	Filter:Country
2	Internal Targets	Attr1.1		mean	4.8	Company total	Htotal	
3	Internal Targets	Attr1.2		mean	4.2	Company total	Htotal	
4	Internal Targets	Attr1.1		mean	4.7	Business area 1	B.area1	
5	Internal Targets	Attr1.2		mean	3.4	Business area 1	B.area1	
6	Internal Targets	Attr1.1		mean	4.8	Business area 1 (Sweden)	B.area1	1
7	Internal Targets	Attr1.2		mean	3.7	Business area 1 (Sweden)	B.area1	1
8	Internal Targets	Attr1.1		mean	4.6	Business area 1 (Germany)	B.area1	2
9	Internal Targets	Attr1.2		mean	3.1	Business area 1 (Germany)	B.area1	2
10	Internal Targets	Attr1.1		mean	4.9	Team 1	B.area1Team1	
11	Internal Targets	Attr1.2		mean	3.3	Team 1	B.area1Team1	
12	Internal Targets	Attr1.1		mean	4.6	Team 2	B.area1Team2	
13	Internal Targets	Attr1.2		mean	3.3	Team 2	B.area1Team2	
14	Internal Targets	Attr1.1		mean	3.3	Business area 2	B.area2	
15	Internal Targets	Attr1.2		mean	4.9	Business area 2	B.area2	

The codes of the hierarchical units to be used in the reference data file can be seen in the Hierarchical filter page, you can also get a list of all the codes by downloading the Report user template Excel from the Report user page.

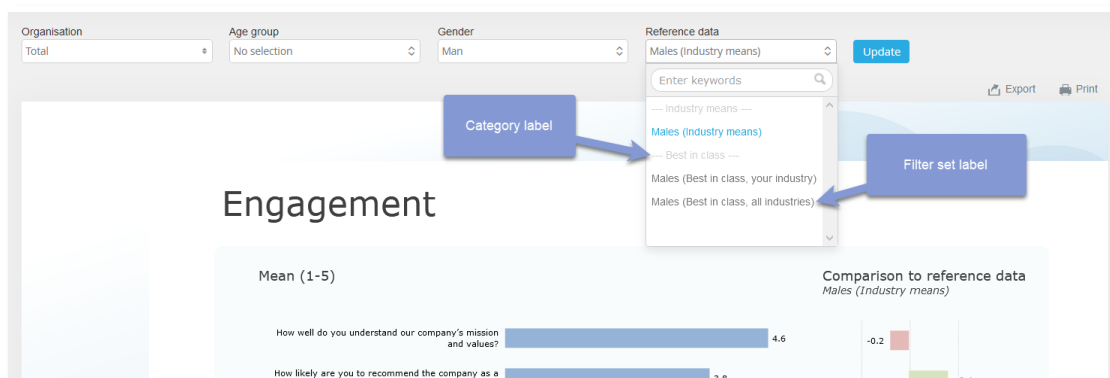
Here we see the unit codes in the Hierarchical filter page and in the downloaded Report user template.

Note, if the Hierarchy module in Confirmit/Horizon is used for creating hierarchies a “Tag” concept can be used for grouping hierarchy units of same type. The Filter sets in the uploaded reference data can then be connected to the hierarchy tags instead of the hierarchy unit codes which reduce number of reference data values to be uploaded. In a future version a similar tag concept will be implemented in the hierarchies built in Dapresy. For more information about setup of tags in the hierarchy module of Confirmit/Horizon and how to structure the reference data contact support and they will assist you.

Filter set

The name of the Filter set (the filter combination). The Filter set names are displayed to the Report users in the StoryTeller reports so these should be user-friendly.

Example of Filter set names shown for Report user.



Note, all rows belonging to the same Filter sets should have the same filter connections.

The file below is invalid as the same Filter set names are used for row 1 and 2 but these are connected to different filters.

1	Category	Question id	Answer id	Calculation	Value	Filter set	Hfilter	Filter:Country
2	Internal Targets	Attr1.1		mean	4.8	Company total	Htotal	1
3	Internal Targets	Attr1.2		mean	4.2	Company total	Htotal	
4	Internal Targets	Attr1.1		mean	4.7	Business area 1	B.area1	
5	Internal Targets	Attr1.2		mean	3.4	Business area 1	B.area1	

Calculation

Specifies the calculation type the value is connected to, reference data can be uploaded to the following calculation types:

- Categorical: mean, %, count
- Numeric: sum, mean, median, min, max

Example of reference values for both mean and % for the same question. Based on this calculation information system can pick the right value automatically based on calculation type applied to the survey data.

	A	B	C	D	E	F	G
1	Category	Question id	Answer id	Calculation	Value	Filter set	Hfilter
2	Internal Targets	Attr1.1		mean	4.8	Company total	Htotal
3	Internal Targets	Attr1.2		mean	4.2	Company total	Htotal
4	Internal Targets	Attr1.1		mean	4.7	Business area 1	B.area1
5	Internal Targets	Attr1.2		mean	3.4	Business area 1	B.area1
6	Internal Targets	Attr1.1	5 %		54	Company total	Htotal
7	Internal Targets	Attr1.2	5 %		51	Company total	Htotal
8	Internal Targets	Attr1.1	5 %		55	Business area 1	B.area1
9	Internal Targets	Attr1.2	5 %		59	Business area 1	B.area1

Value

The reference value, use period as decimal separator.

Percentile

This column is optional and should only be used when having percentile level reference data. 0-100 without decimals are valid values.

Example of percentile reference values, see column F.

	A	B	C	D	E	F	G	H
1	Category	Question id	Answer id	Calculation	Value	Percentile	Filter set	Filter:BgGender
2	Industry means	Attr1.1		mean	3.5	10	Males (Your industry means)	1
3	Industry means	Attr1.1		mean	3.6	20	Males (Your industry means)	1
4	Industry means	Attr1.1		mean	3.8	30	Males (Your industry means)	1
5	Industry means	Attr1.1		mean	3.85	40	Males (Your industry means)	1
6	Industry means	Attr1.1		mean	4.03	50	Males (Your industry means)	1
7	Industry means	Attr1.1		mean	4.1	60	Males (Your industry means)	1
8	Industry means	Attr1.1		mean	4.2	70	Males (Your industry means)	1
9	Industry means	Attr1.1		mean	4.37	80	Males (Your industry means)	1
10	Industry means	Attr1.1		mean	4.6	90	Males (Your industry means)	1
11	Industry means	Attr1.2		mean	2.8	10	Males (Your industry means)	1
12	Industry means	Attr1.2		mean	3.1	20	Males (Your industry means)	1
13	Industry means	Attr1.2		mean	3.3	30	Males (Your industry means)	1
14	Industry means	Attr1.2		mean	3.5	40	Males (Your industry means)	1
15	Industry means	Attr1.2		mean	3.56	50	Males (Your industry means)	1
16	Industry means	Attr1.2		mean	3.72	60	Males (Your industry means)	1
17	Industry means	Attr1.2		mean	3.9	70	Males (Your industry means)	1
18	Industry means	Attr1.2		mean	4.2	80	Males (Your industry means)	1
19	Industry means	Attr1.2		mean	4.5	90	Males (Your industry means)	1

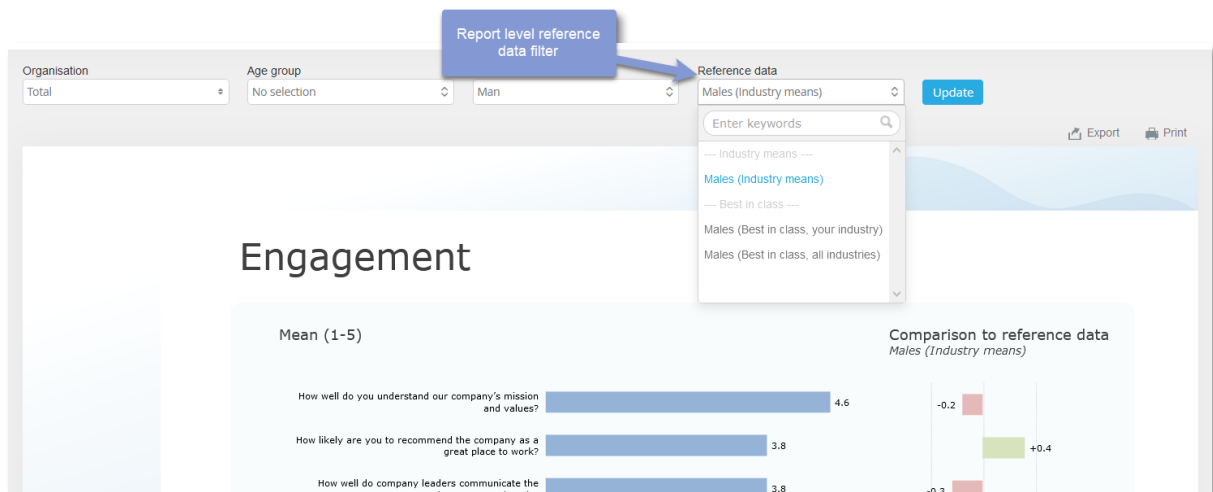
Note, it is not required to include values for every percentile, you can, for example, only include values for percentile 10, 50 and 90 or for 10, 20, 30, 40, 50, 60, 70, 80, 90, 100 like in the example above. The granularity of the percentiles in the uploaded reference data will be reflected in percentile ranking result. If percentile ranking result should be 1-100 you need to include percentiles values for 1-100.

9.2.2 Reporting on reference data

The uploaded and activated reference data can be reported stand alone in StoryTeller charts and tables or used to for survey data comparison.

In this first version it is required to have a “report level reference data filter” in order to apply Reference data to any object, in future versions it will be supported to apply reference data directly to charts and tables without having a report level reference filter.

Here we see the report level reference data filter that currently must be used in order to apply reference data to a chart or a table.



The Filter sets selected in the report level reference filter shown above is applied to all data objects using reference data no matter what filter combination is applied within the charts and tables objects. Due to this logic it is recommended to not have in-chart/in-tables filters that theoretically can have an impact on which reference Filter sets to be used as comparison.

Example: reference data is uploaded for the Filter sets “Males” and “Females”.

- Good practice is to use “Gender” as an optional filter as you will be able to apply the correct reference data Filter sets to the report based on which gender item is selected in the Gender survey filter.
- Bad practice is to apply Gender as an in-chart filter split (show survey result for Male and Female in same chart) as the Reference Filter set selected by the user (Males or Females) will be applied to both the Male series and the Females series in the chart, one of these series will be compared to inaccurate reference values.

As mentioned above you can limit which reference Filter sets to be shown for the users based on what hierarchical and optional filter selection that been made, there are a few

different rules which you can read more about further down but as an example you can limit the Filters sets by which hierarchy unit the Report user select, or by which Optional filters the Report user selects or a combination of hierarchy unit and Optional filter selection.

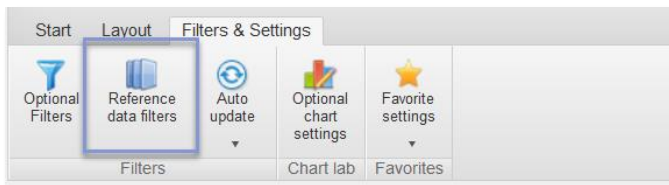
Due to the need of having a reference data filter, on a report level, the report setup is done in two steps:

- Step1, setup report level reference filter: specify which Reference Categories and Filter sets to be shown in the reference data filter and if any rules shall be applied to limit which Filter sets to be shown for the users based on hierarchical and Optional filter selections
- Step 2, report reference data in charts and tables: in the chart and table objects specify if the reference data should be applied to the object and how (display the reference data only, display the difference between the survey data and the reference data, calculate percentile ranking etc.)

9.2.2.1 Setup report level reference data filter

The report level reference data filter is setup in a new page named Reference filter, the link is shown in the StoryTeller menu when the project has activated reference data.

Link to the reference data filter setup.



In this page you first need to enable the reference data option in top left corner to see the rest of the setup options.

Here we see the setup page.

Reference Data Filters ×

Add Reference Data Filter

Filter label

Add No Selection option

Show all selected Reference Filter sets
 Limit Reference Filter sets based on filter selections

SELECT REFERENCE FILTER SETS

Internal Targets

Include all Filter sets

- Targets for Company Total
- Targets for Business area 1
- Targets for Business area 2
- Targets for Business area 3
- Targets for Team 1
- Targets for Team 2
- Targets for Team 3
- Targets for Team 4
- Targets for Team 5
- Targets for Team 6

Cancel
Save

In the panel “Select reference Filter sets” all the Filter sets, grouped by the Categories in the activated reference data are listed. Select the “gross” list of Filter sets to be available for the users.

Here you select the gross Filter sets to be shown in the reference filter list in the report. If the “Include all Filter sets” option is ticked future added Filter sets will be added to the report automatically.

SELECT REFERENCE FILTER SETS

Internal Targets

Include all Filter sets

Targets for Company Total

Targets for Business area 1

Targets for Business area 2

Targets for Business area 3

Targets for Team 1

Targets for Team 2

Targets for Team 3

Targets for Team 4

Targets for Team 5

Targets for Team 6

In the controls shown in the image further down specify if the chosen Filter sets should be limited or not based on Optional and Hierarchical filter selections by the Report users.

- “Show all selected Reference Filter sets”, all the selected Filter sets will always be available to choose from no matter what Hierarchical and Optional filters the users select.
- “Limit Reference Filter sets based on filter selections”, you specify the rules for limiting the Filter sets, the options you can choose from differs depending on if the current StoryTeller uses Hierarchical filters or not.

Filter sets limiting options when Optional filters are used in the StoryTeller

The available limiting options when the Storyteller report contains Optional filters only, see explanations to each option below the image.

Limit Reference Filter sets based on filter selections

Show Filter sets of every Optional filter selection

Show Filter sets of combined Optional filter selections

Specify Filter sets that are always shown

“Show Filter sets of every Optional filter selection”: All the reference Filter sets of every Optional filter selection is shown in the reference filter list.

Use this option when the uploaded reference data is connected to single filter selections only.

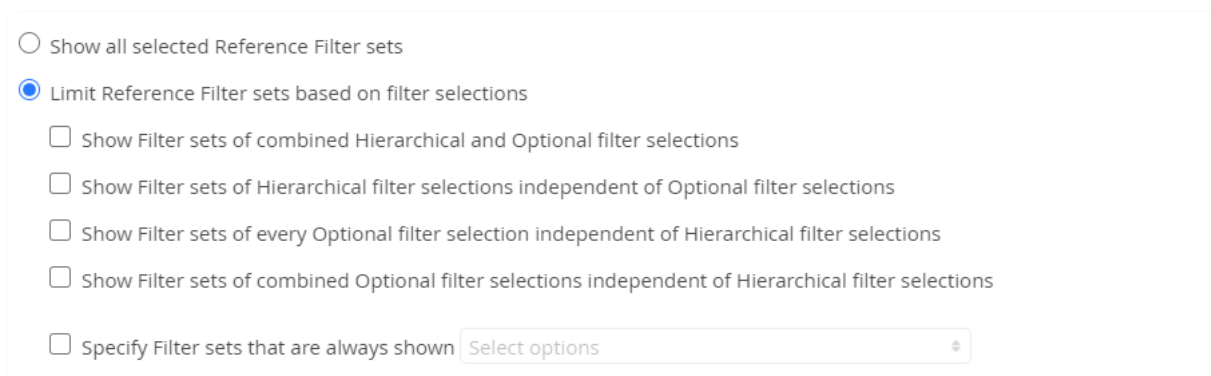
“Show Filter sets of combined Optional filter selection”: All the reference Filter sets connected to the combined Optional filter selection is shown in the reference filter list.

Use this option when the uploaded reference data is connected to Optional filter combinations and not to hierarchy units.

Specify Filter sets that are always shown: When enabling this option, select Filter sets that are always included in the reference filter list no matter what Optional filters the user selects. This is useful when for example having a “Total” reference Filter set that always should be available to choose even if survey data is filtered.

Filter sets limiting options when Optional filters and Hierarchical filters are used in the StoryTeller

Here we see the available limiting options when the Storyteller report contains Optional filters and Hierarchical filters, see explanations to each option below the image.



The screenshot shows a list of radio button options for limiting reference filter sets. The first option, "Limit Reference Filter sets based on filter selections", is selected. Below it are five unchecked checkbox options: "Show Filter sets of combined Hierarchical and Optional filter selections", "Show Filter sets of Hierarchical filter selections independent of Optional filter selections", "Show Filter sets of every Optional filter selection independent of Hierarchical filter selections", "Show Filter sets of combined Optional filter selections independent of Hierarchical filter selections", and "Specify Filter sets that are always shown" followed by a dropdown menu labeled "Select options".

“Show Filter sets of combined Hierarchical and Optional filter selection”: All the reference Filter sets connected to the combined Hierarchical filter and Optional filter selection is shown in the reference filter list.

Use this option when the uploaded reference data is connected to the combination of optional filters.

“Show Filter sets of Hierarchical filter selections independent of combined Optional filter selection”: All the reference Filter sets connected to the selected hierarchy unit is shown even if the user make selections in any other Optional filter.

Use this option when the uploaded reference data is connected to the hierarchy filters only, but the StoryTeller also contains other Optional filters.

“Show Filter sets of every Optional filter selection independent of Hierarchical filter selection”: All the reference Filter sets connected to every Optional filter selection is shown in the reference filter list independent of hierarchy selection.

Use this option when the uploaded reference data is connected to single filter selections only even if the user can, in the StoryTeller, select hierarchy units and optional filter combinations.

“Show Filter sets of combined Optional filter selection independent of Hierarchical filter selection”: All the reference Filter sets connected to the combined Optional filter selection is shown in the reference filter list independent of hierarchy selection.

Use this option when the uploaded reference data is connected to Optional filter combinations and not to hierarchy units.

Specify Filter sets that are always shown: When enabling this option, you can select Filter sets that are always included in the reference filter list no matter which hierarchy unit and Optional filter the user selects. This is useful when for example having a “Total” reference Filter set that always should be available to choose even if survey data is filtered.

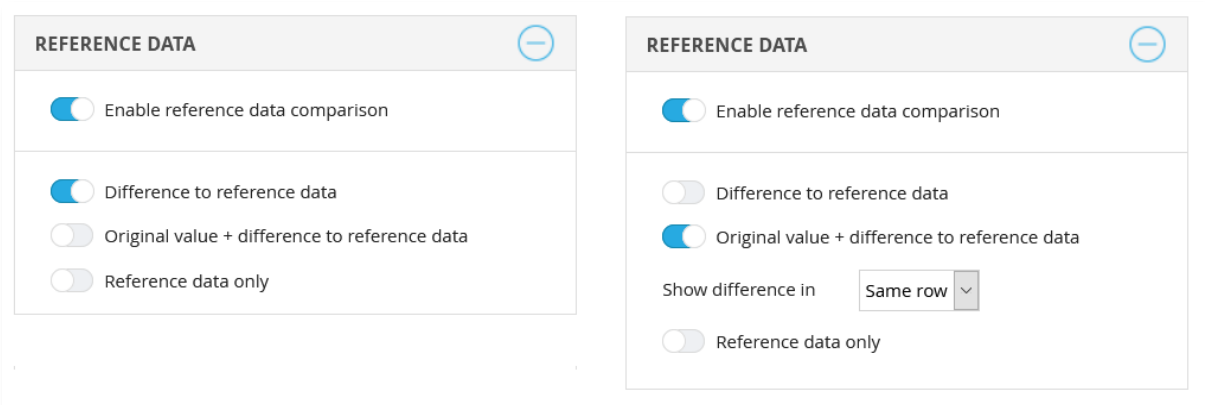
9.2.2.2 Apply reference data to charts and tables.

The reference data setup in charts and tables is made in new Reference data panel in the Analysis tab as shown below, the panel is shown only in projects with activated reference data.

The content in the panel looks different depending on if the reference data contains percentiles or not and if the object is a chart or a table.

Option when percentile values are not included in uploaded reference data

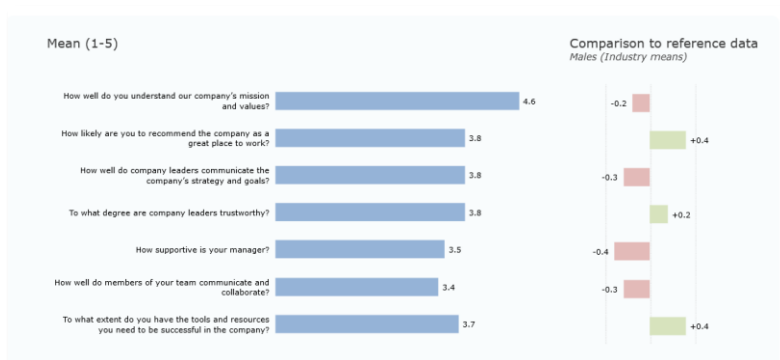
Reference panel in projects without percentiles, left image shows chart setup and right the table setup.



As shown above you have the following reporting options:

Difference to reference data: the difference between the survey data and the reference data is shown.

Example: the right chart shows the difference between the survey data and the reference data.



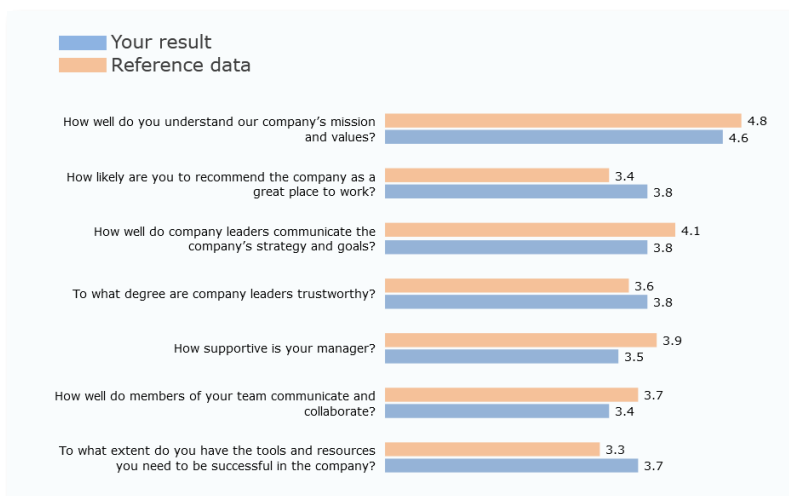
Original value + difference to reference data: both the original and the difference between the survey data and the reference data will be shown. The difference is shown in within brackets.

Example: the difference between the survey data and the reference data is shown in brackets.



Reference data only: the reference data from the uploaded reference file is displayed.

Example: the chart below is built with two series; first series shows survey data only and second series shows reference data only.



Note: in Project settings page you specify if all decimals of the survey and reference data should be used or the displayed number of decimals.

Layouts and Formats

Calculation and Results

- Calculation precision
- Sorting by value
- Word cloud exclusion list

Exports

Access rights

Events and Forms

Email sender address

Security settings

Custom code

Project name and location

Linked projects

Super admin settings

Calculate benchmark with

- all decimals
- displayed number of decimals

Calculate ranking with

- all decimals
- displayed number of decimals

Calculate reference data with

- all decimals
- displayed number of decimals

CHART SERIES PRECISION

Show chart series precision with

- all decimals
- displayed number of decimals

PERCENTILE RANKING BY REFERENCE DATA

If survey result falls below lowest imported percentile

- assign lowest percentile
- show result as '-'

Option when percentile values are included in uploaded reference data

Reference panel in projects with percentiles, left image shows chart setup and right the table setup.

REFERENCE DATA -

Enable reference data comparison

Difference to reference data

Original value + difference to reference data

Reference data only

Compare to percentile

REFERENCE DATA -

Enable reference data comparison

Difference to reference data

Original value + difference to reference data

Show difference in

Reference data only

Percentile ranking

Compare to percentile

As shown above the options are nearly identical as when not having percentiles in the reference data but when percentile are used you must specify which percentile in the reference data the survey result should be compare to.

If, as an example, the uploaded reference data has reference values for percentile 10, 50 and 90 you should enter 10, 50 or 90 in the “Compare to percentile” input field. 50 is always default value in this field.

Also, you can calculate the Percentile ranking in tables. When using the Percentile ranking option the survey result is compared to all the uploaded percentiles in the reference data, if the survey value is between two percentiles the lowest percentile is used as result.

Note; if the survey result is below the lowest imported percentile you can, in the Project settings page, specify if the percentile ranking result should be equal to the lowest imported percentile or “-”.

Here we see the percentile ranking setting in the Project settings page.

The screenshot shows the 'Calculation and Results' section of the Project settings page. The left sidebar lists various settings categories, with 'Calculation and Results' selected. The main content area is divided into several sections:

- Calculate benchmark with:** Two toggle switches: 'all decimals' (checked) and 'displayed number of decimals' (unchecked).
- Calculate ranking with:** Two toggle switches: 'all decimals' (checked) and 'displayed number of decimals' (unchecked).
- Calculate reference data with:** Two toggle switches: 'all decimals' (checked) and 'displayed number of decimals' (unchecked).
- CHART SERIES PRECISION:** Two toggle switches: 'all decimals' (checked) and 'displayed number of decimals' (unchecked).
- PERCENTILE RANKING BY REFERENCE DATA:** Two toggle switches: 'assign lowest percentile' (checked) and 'show result as \'-\'' (unchecked).

Limitations - reference data cannot be used in combination with for example Statistical testing

The Reference data function cannot be used in combination with Benchmarks, Ranking, Statistical analysis and Aggregates series.

Reference data can be used in combination with Mean value series, if Mean value series is applied to a chart/table the Mean value series is run in last step, after the reference result has been calculated.