Dapresy Pro 2020

February Release

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1 - Introduction

This document describes new and improved features in the Dapresy Pro 2020 February 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 Pro 2020 February 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:

Variable administration

- Improvements in Question administration page
    - Improved sorting of questions, you can now move multiple questions to top/bottom of the question list with a single click
    - Better column filtering. You can now make multi choice selection in column filters, with fixed items, which makes it easier to work with relevant questions in the question grid
    - Improved creation of Grouped Answers in Answer block page
    - Support for turning columns on/off in Answer block page, by limiting the columns to be displayed you can focus on relevant settings only
    - Stacked question indicator in the question grid, a new column indicates the origin of each variable (stacked or unstacked data source)

StoryCreator

- New support for converting a table to a chart, and vice versa, to increase efficiency - no need to build an object from scratch just because you want to change object type
- Ability to define which deck to be loaded by default when opening the StoryCreator, set your most used deck to default!
- Improved keyboard shortcuts, in order to work more efficient in the StoryCreator, like saving deck, copy & paste slides, delete slides etc.
- “Kiosk mode”, allows access to decks but no updates. Kiosk mode is suitable in demo projects, if the same login are used by several persons, as the users will have access to load already saved decks but not to edit, delete or create new decks
- Exports (PPT, PDF and Excel) are no longer exported in compressed (zipped) format

StoryTeller improvements

- The interactions that can be created with what we call Event functionality in text boxes and icons, which allows user actions such as clicks and hover to trigger functions, is now also available in charts and tables. By using events in a chart or table object you can, for example,

create a custom navigation by making a chart or a table a link to any other report or slide or you can add a tool-tip for a specific object that shows information about how to interpret the result.

- When creating the link in Events you can now set either an object or a specific slide number as a target, previously you could only set an object as the target.
- Improved logic in "Hierarchical filter vs Variable subsets. The logic used to determine which Variable subsets to be displayed has been improved when users can choose multiple nodes in the Hierarchical filter. Previously, the subsets connected to **any** of the selected hierarchical filter nodes were displayed but now during the setup you can specify whether the Variable subsets connected **to any or all selected nodes** will be displayed.
- Updated sorting logic in Solid gauges, previously the items in a solid gauge were sorted anti-clockwise and did not follow the sort order in the legend. The sorting logic is now updated so the items are sorted clockwise and at the same time following the sorting in the legend. The new logic is applied to newly created Solid gauges only, all existing Solid gauges are still sorted as before to prevent any unintended updates to your projects.
- The Aggregated series function, in charts and tables, gave no result if any of the in going values to be aggregated were "missing". Now you now can choose if series will be aggregated or not when an in going series has a "missing" result
- Legacy components "Linked charts" and "Event creator" are removed from new projects and no longer supported. These components are still supported in old projects, if they are used, but you cannot add any new Linked charts or Event creators to your projects.

Cross Table Tool

- You can now search in hierarchical filter tree which makes it easier to find nodes
- When displaying multiple hierarchical filter nodes, in columns or rows, you can now specify if these shall be ordered by branch or by level.
- New "quick" selection option can now be used to select multiple hierarchical filter nodes more efficient, as an example you can now auto-select all child nodes to the selected node, all siblings to the selected node, all nodes X levels down from the selected node etc. This saves a lot of time as you don't need to select all the desired nodes manually.

Computed/Input variables

- Computed/input variables using the special value #CurrentDate# in the expression is often used in CX surveys with closed loops to identify delayed follow-ups etc. Until today the computed/input variables using current date in expression were only updated after data

activation and hence only suitable to use in projects with daily uploads. Now these variables will be updated daily without any data import/data activation requirement.

Report user administration

- Form reports, mostly used in the closed loop process in CX projects, are no longer appearing in pages for setting access rights to Report users as the access to Forms, anyway, always been based on the access to the Storyteller linking to the Form report. To be clear, no changes in access rights logic have been made, the interface has just been made more user-friendly.

3 Variable administration

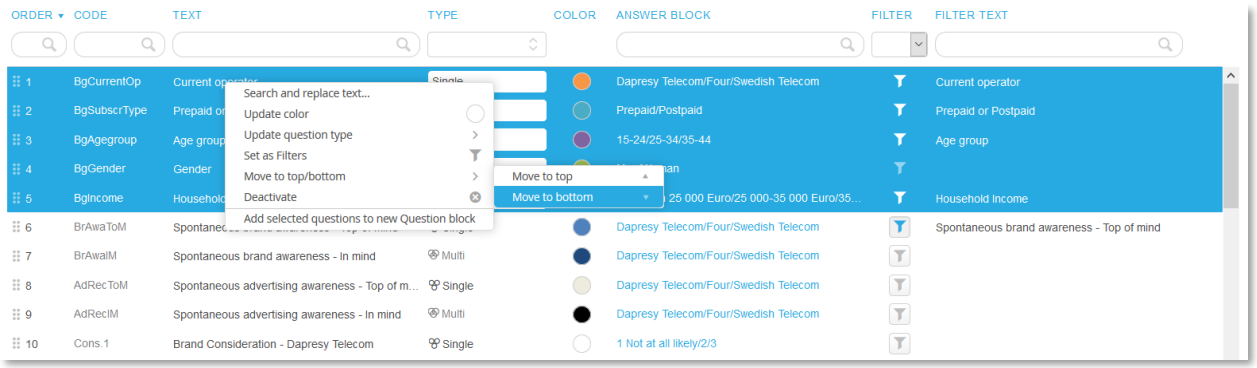
The following chapters describes the improvements in the Question administration page.

3.1 Improved question sorting options

You can now move several questions to the top or bottom of the question list with a single click via a new “Move” option in the context menu.

To move a set of questions, select the questions to be moved and apply either “Move to top” or “Move to bottom” in the context menu.

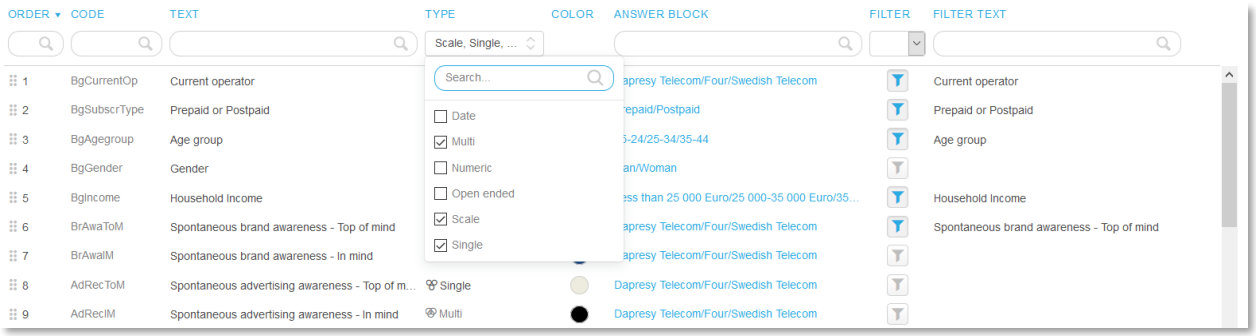
Here we see the new option for moving one or multiple questions to the top or the bottom of the question list.



3.2 Improved column filters, multi select support

We now support selecting multiple filter options in the column filters, with a fixed filter list, like for example the Question type filter.

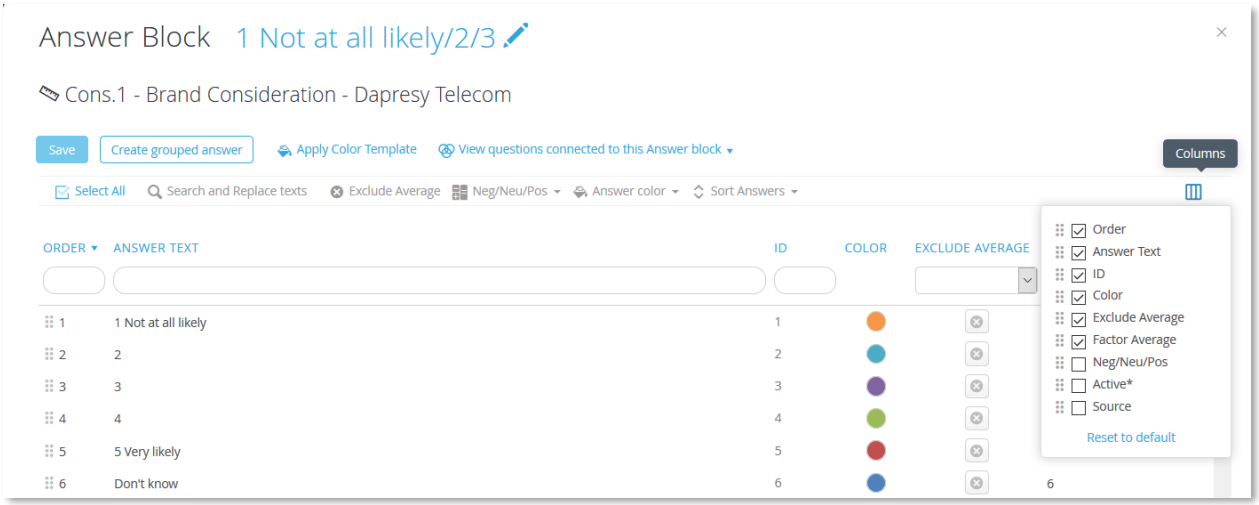
Here is an example where multiple filter items have been selected in the Type filter.



3.3 Support for turning columns on/off in Answer block page

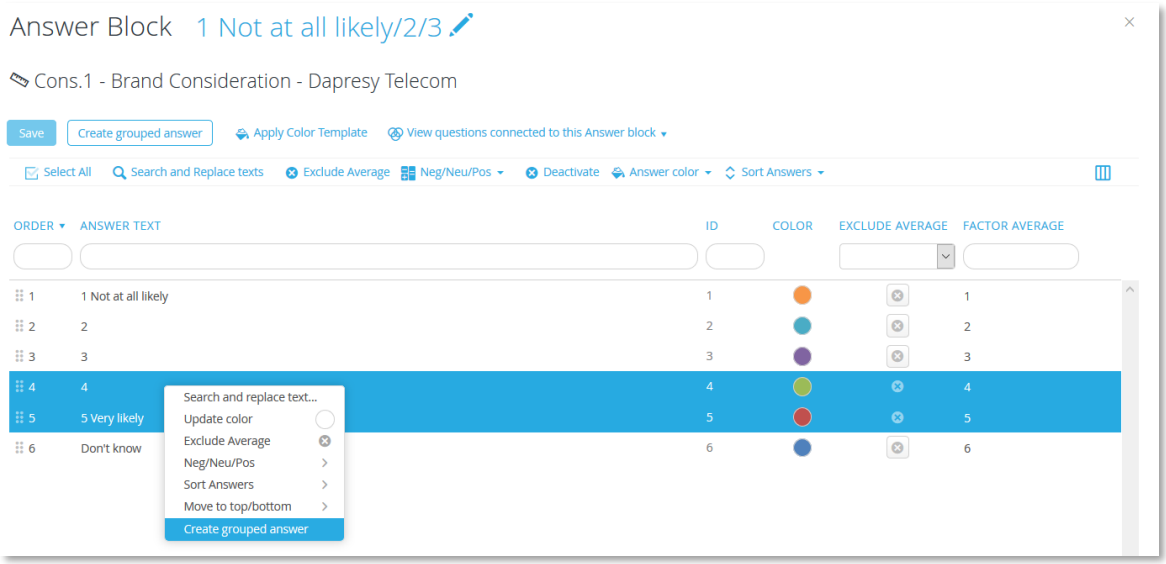
The Answer block popup now has a “Column selection” control with same logic as in the Question grid so you can select which columns are displayed in the grid, which makes it easier to focus on relevant settings.

Here we see the new column selection control in the Answer block popup page.



3.4 Improved creation of Grouped Answers

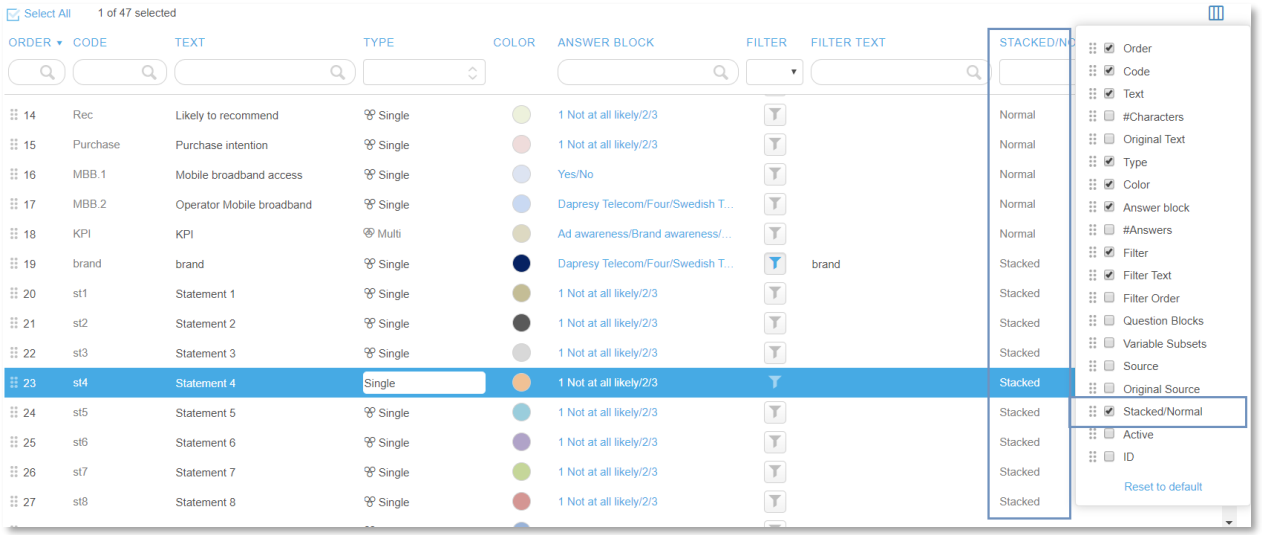
The Grouped answer creation process has been simplified, already in the Answer block popup page you can select the answers to be merged to a new Grouped answer and then apply the option “Create Grouped answer” in the context menu.



3.5 Stacked question indicator in Question grid

If the project contains both stacked and normal data you can now see the origin of each variable in the new column Stacked/Normal, the column is hidden by default but can be turned on in the column selection panel.

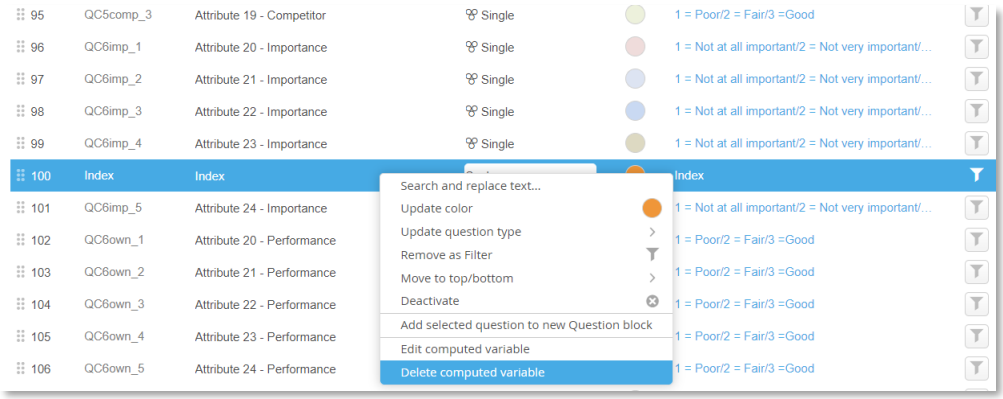
Here we see the new column, it indicates if a question comes from a stacked data file or not. The column is only present in projects which contain stacked data.



3.6 Edit and Delete created variables via context menu

You can now edit or delete created variables via new option in the context menu.

Here we see the new options in the bottom of the context menu.



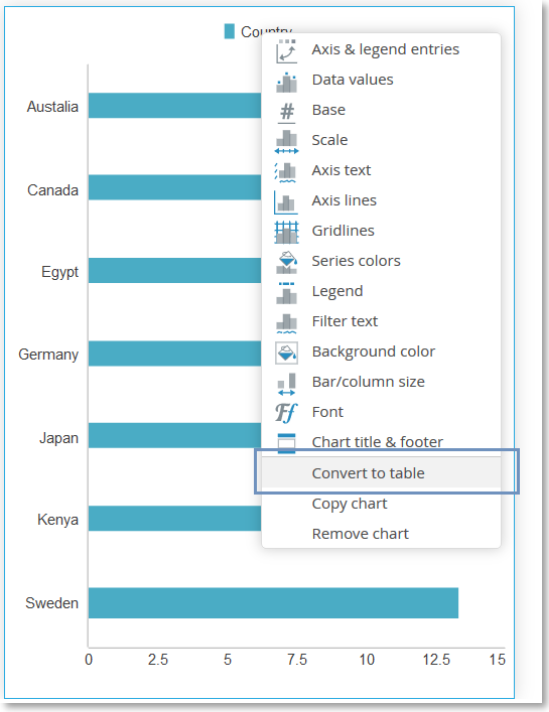
4 StoryCreator updates

The following chapters describes the improvements in the StoryCreator.

4.1 Convert chart to table

You can now convert a chart to a table, or a table to a chart, which increase efficiency if you want to change object type.

Here we see the new convert option in the context menu.



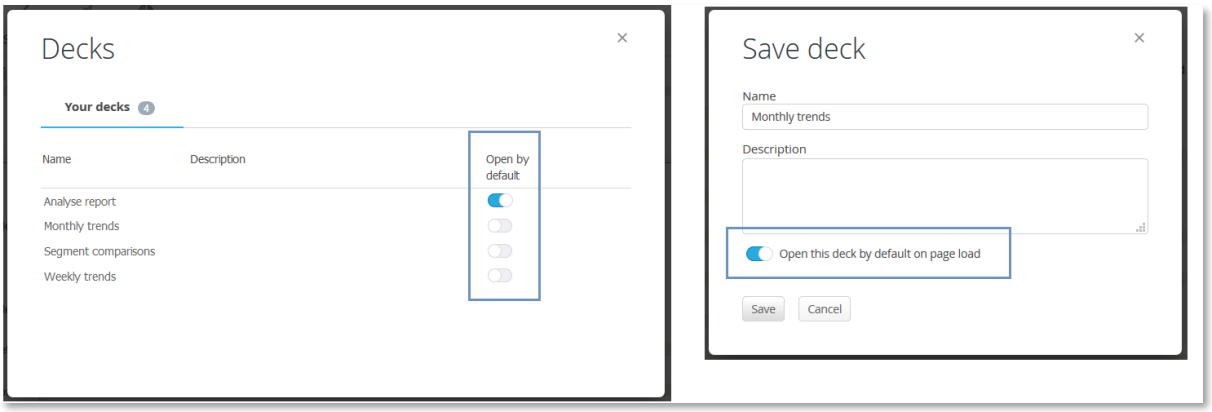
Note the following: when converting a chart to a table, or vice versa, the following settings will be lost if they are applied (a warning message displays what will be lost during the conversion)

- The sorting settings, such as sort by value, will go back to default sorting
- Benchmark settings calculation will be turned off
- Significance testing calculations will be turned off

4.2 Load a deck by default when entering the StoryCreator

You can now set a deck to be loaded by default when entering the StoryCreator report. The new setting for specifying if a deck, and which deck, to be loaded by default is added to both the “Deck” panel and the “Save as…” panels a shown in the image below.

Here we see the new option to specify which deck to be loaded by default.



4.3 Supported keyboard shortcuts

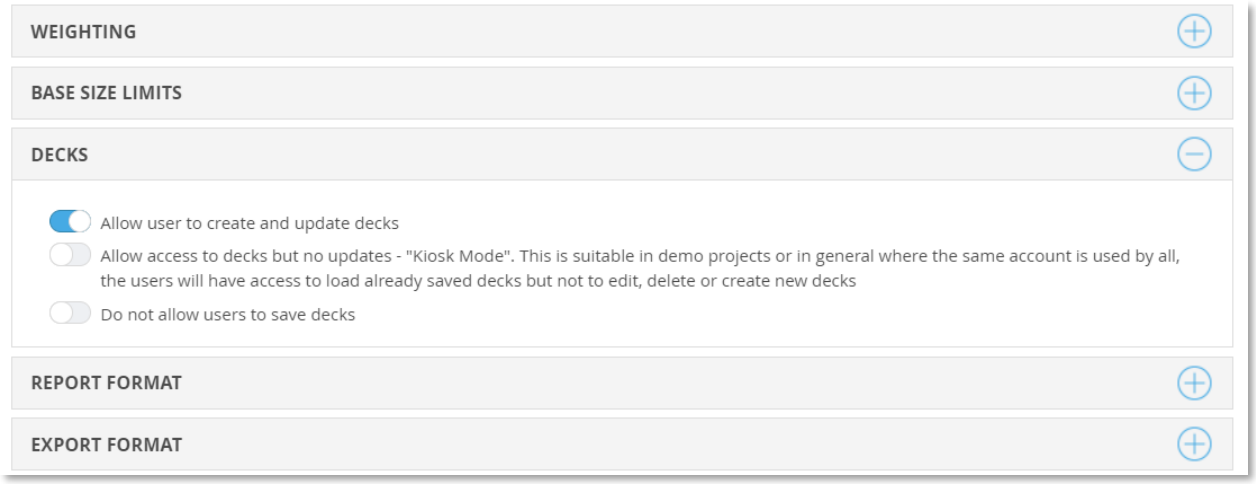
Additional keyboard shortcuts have been added in order to work more efficiently in the StoryCreator. Below you see the list of supported keyboard shortcuts in the StoryCreator.

- On Windows Ctrl + S – on Mac Cmd + S - saves the deck
- On Windows Ctrl + C and Ctrl + V – on Mac Cmd + C and Cmd + V - copy and paste slides or objects
- Delete – delete a slide or an object
- Escape - close presentation mode

4.4 “Kiosk mode”, allows access to decks but not updates.

A “Kiosk mode” setting can now be applied to the StoryCreator. Kiosk mode means that the users can only load existing Decks but not create new or edit decks. This is suitable in demo projects where several persons share the same report user account.

Here we see the new “Kiosk mode” setting in the Setup panel of the StoryCreator, it is the second option in the Deck panel.



4.5 Exports (PPT, PDF and Excel) are no longer exported in compressed (zipped) format

Previously a downloaded file, from the StoryCreator, was compressed into a zipped folder. The download logic has now been updated so exports are no longer compressed when downloading a single file.

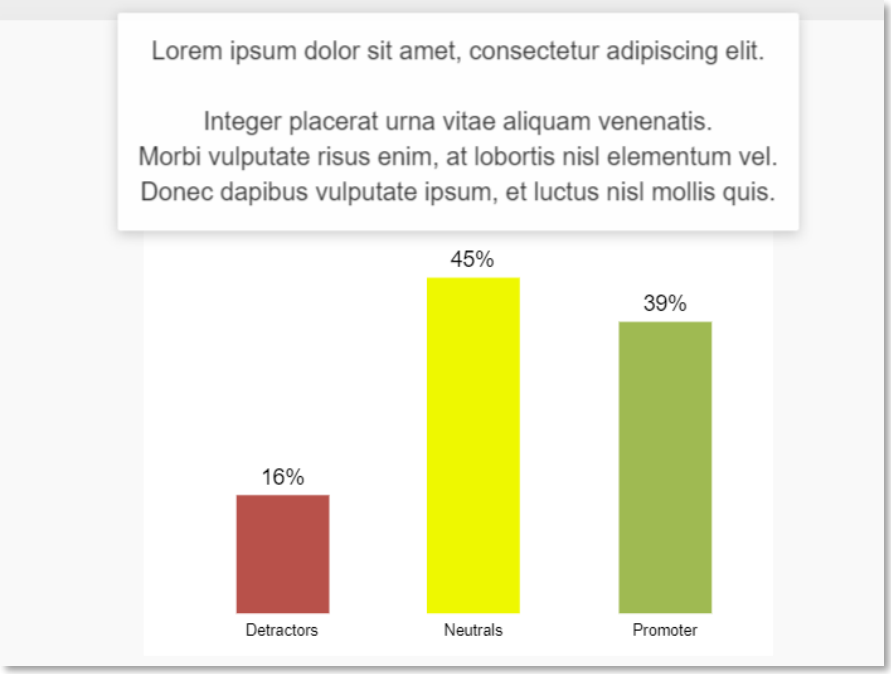
5 StoryTeller improvements

The following chapters describes the improvements in the StoryTeller.

5.1 Event support in Charts and Tables

The Event functionality in text boxes and icons, which allows you to create rich interactions driven by user actions is now also available in charts and tables. By using events in a chart or table object you can, for example, create a custom navigation by making a chart or a table a link to any other report or slide or you can add a tool-tip for a specific object that shows information about how to interpret the result.

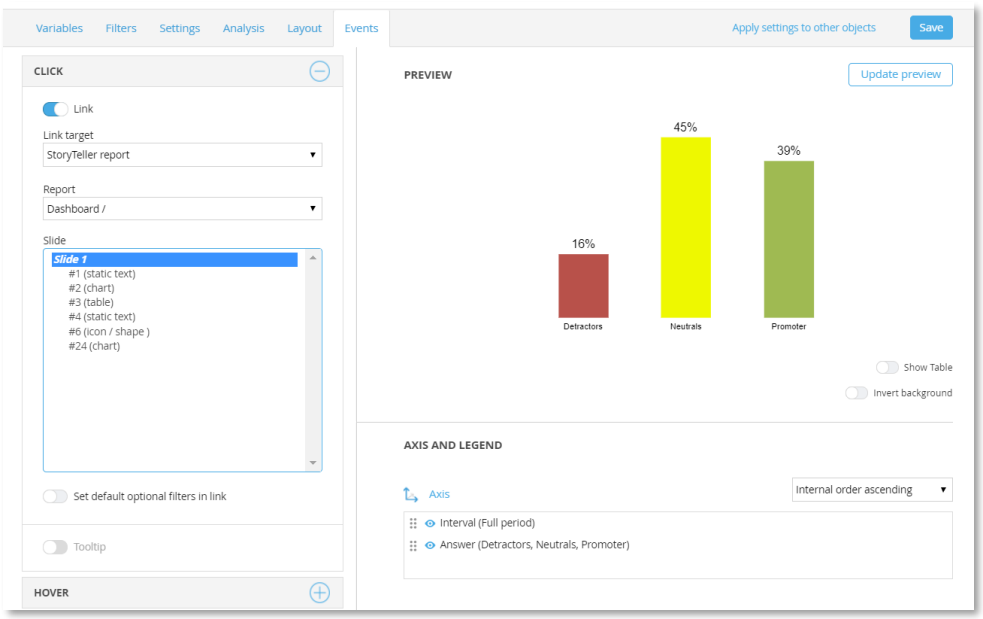
Here we see an example of a chart with a tooltip appearing on hover.



5.1.1 Setup of Events

The setup of Events, in charts and tables, is identical to set up of Events in text box and icon objects which means that you can define both click Events and Hover Events. The Event tab is positioned as last tab in the chart and table setup as shown in the image below.

Here we see the Event setup in a chart.

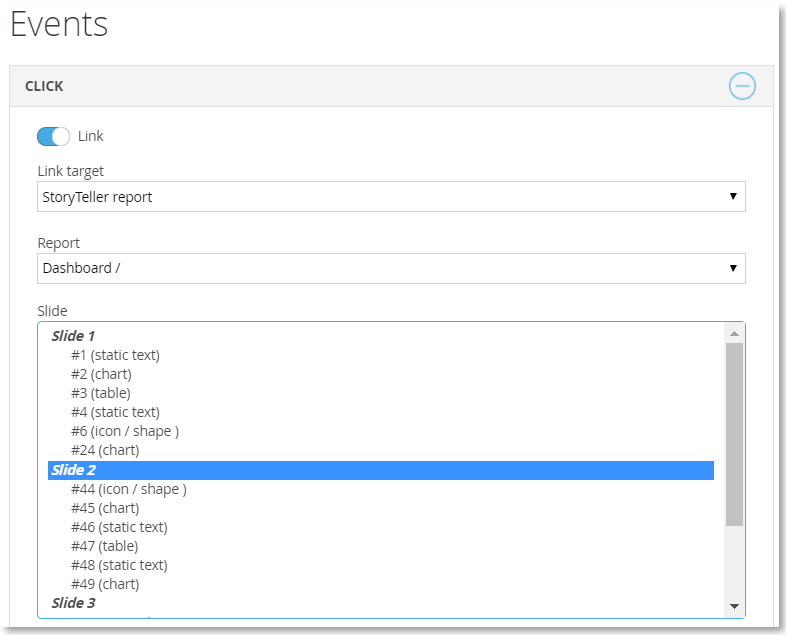


Note, when setting up Links in a text box or an icon object you can create links to external web pages and “back to previous report”, these two link options are not supported in charts and tables.

5.2 Improved Link setup in Events, link to a slide number

When creating links in Events you can now set either an object or a slide number as a target, previously you could set an object as a target only.

The link setup in Events in a text box, now you can select to set either a slide number or an object as the link target. In this example the link goes to slide 2.



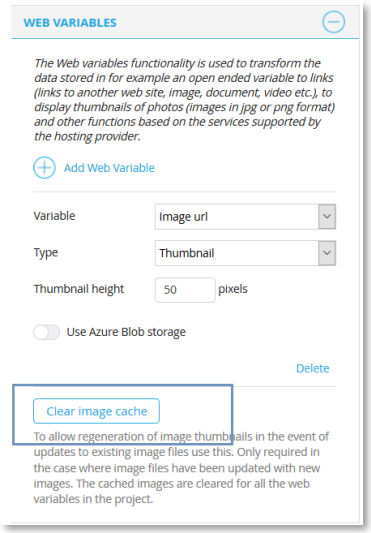
Note;

- if setting a slide number as target, like for example slide 2, the link always goes to the second slide
- if setting an object as link target the link goes always to the slide where the object is positioned, even if the object is moved from one slide to another or if the slides are rearranged.

5.3 Respondent table, support for clearing cached thumbnails in Web variables

To allow regeneration of image thumbnails in the event of updates to existing image files you can now clear the cached thumbnails. You only need to clear the image cache in the case where the image files, stored externally, have been updated with new images.

Here we see the new Clear cache option, the cached images are cleared for all the web variables in the project.



5.4 Improved Hierarchical filter vs Variable subsets logic

In StoryTeller reports, with Variable subsets and Hierarchical filters, it is supported to limit which Variable subsets will be displayed, based on selected Hierarchical filter nodes by using the functionality "Variable subsets vs Hierarchical filters".

The logic used to determine which Variable subsets to be displayed, for the users in the Storyteller report, has now been improved when the users can choose multiple nodes in the Hierarchical filter. Previously, the subsets connected to **any** of the selected hierarchical filter nodes were displayed but now during the setup you can specify whether the Variable subsets connected to **any** or **all** selected nodes will be displayed. See example of the differences below.

Example: the Hierarchical filter, in a StoryTeller report, contains the following 3 nodes;

- Sweden
- Denmark
- Germany

In the same report there are 5 variable subsets (one for each brand in the survey):

- Brand A
- Brand B
- Brand C
- Brand D
- Brand E

As all the brands are not available in all the markets the subsets are connected to the Hierarchical filter nodes as listed below:

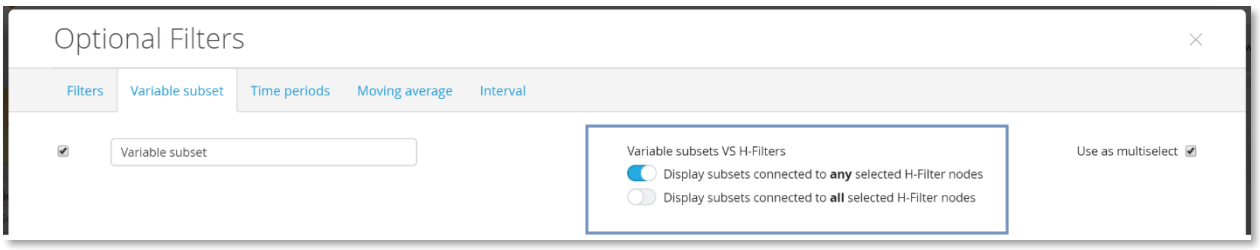
- Brand A – connected to Sweden and Denmark
- Brand B – connected to Sweden and Denmark
- Brand C – connected to Denmark
- Brand D – connected to Sweden and Germany
- Brand E – connected to Sweden and Germany

If the user now selects the nodes Sweden and Denmark the following will happen;

- The subsets Brand A, Brand B, Brand C, Brand D and Brand E appear if it is specified to show the Variable subsets connected to **any** selected node (the previously used logic)
- The subsets Brand A and Brand B appear if it is specified to show the Variable subsets connected to **all** selected nodes (the new option)

The selection of which option to be applied is made in the Optional filter setup page, in the Variable subset tab, as shown in the mage below. The new controls appear only if the function “Variable subsets vs hierarchical filters” is activated and if the report contains both Variable subsets and Hierarchical filters.

Here we see the new controls for specifying logic to be used.



5.5 Updated sorting logic in Solid gauges

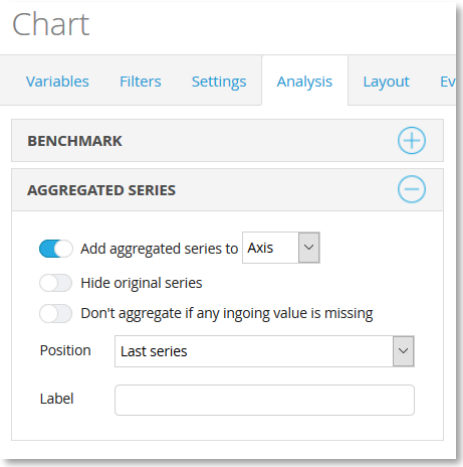
Previously the items in a solid gauge were sorted anti-clockwise and did not follow the sort order in the legend. The sorting logic is now updated so the items are sorted clockwise and at the same time following the sorting in the legend. The new logic is applied to newly created Solid gauges only, existing Solid gauges are still sorted as before.

Here we see two solid gauges; the right gauge shows the old sorting and the left the new sorting. As shown the items in the left gauge are now following the legend order (the new logic).

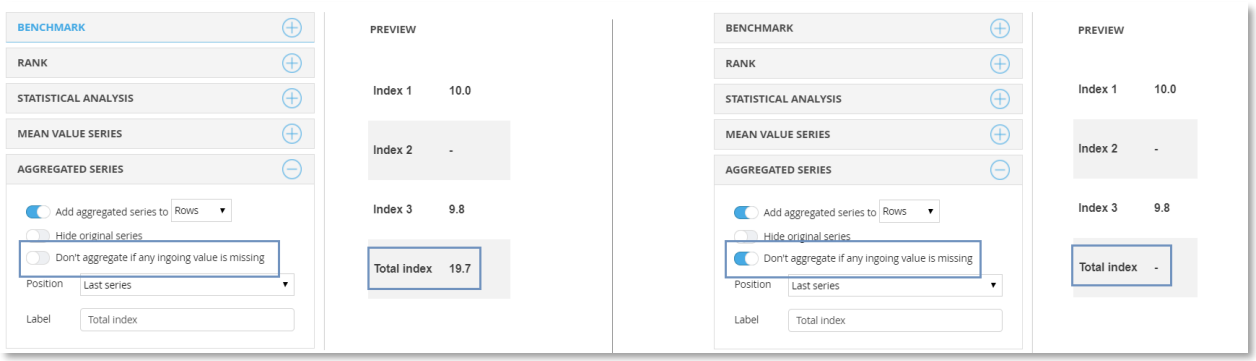
5.6 Updates in the Aggregated series function

The Aggregated series function, in charts and tables, gave no result if any of the ingoing values to aggregate was “missing”. Now you now can select if series will be aggregated or not when any ingoing series has a “missing” result.

Here we see the new setting, tick this setting if no aggregated value shall be calculated if any of the ingoing series has a “missing” result.



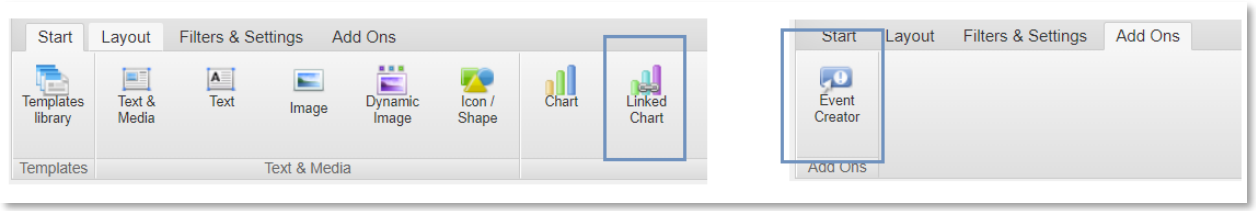
Here we see an example use case. The Aggregated series function is used to calculate a Total index which is the sum of Index 1, Index 2 and Index 3. In both the examples Index 2 does not have any value. In the left example the Total index is calculated but in the right example the Total index is not calculated.



5.7 Legacy components Linked charts and "Event creator" are removed

The legacy components Linked charts and Event creator in the Storyteller are removed and no longer supported. These components are still supported in old projects, if they are used, but you cannot add any new Linked charts or Event creators to your projects.

These two items have been removed from the StoryTeller



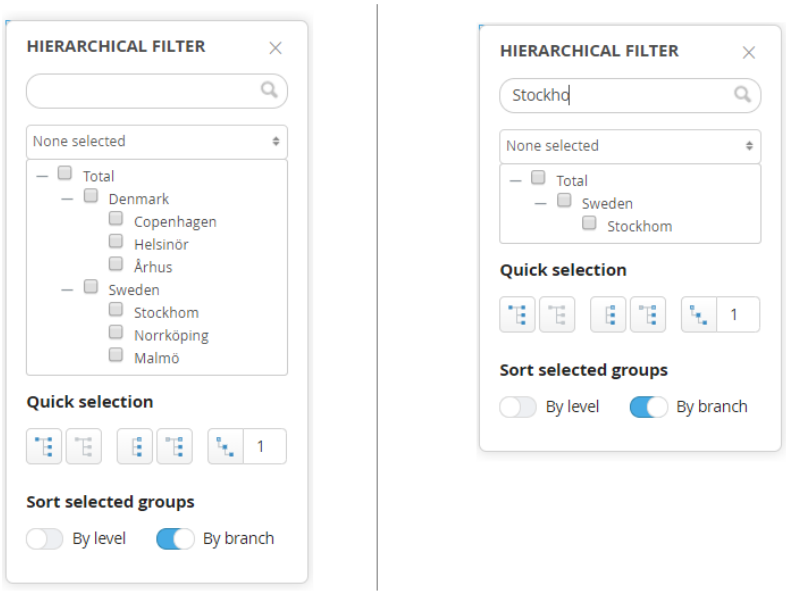
6 Cross Table Tool improvements

The following chapters describes the improvements in the Cross Table Tool.

6.1 Search in hierarchical filter tree

You can now search in the Hierarchical filter tree which makes it easier to find nodes.

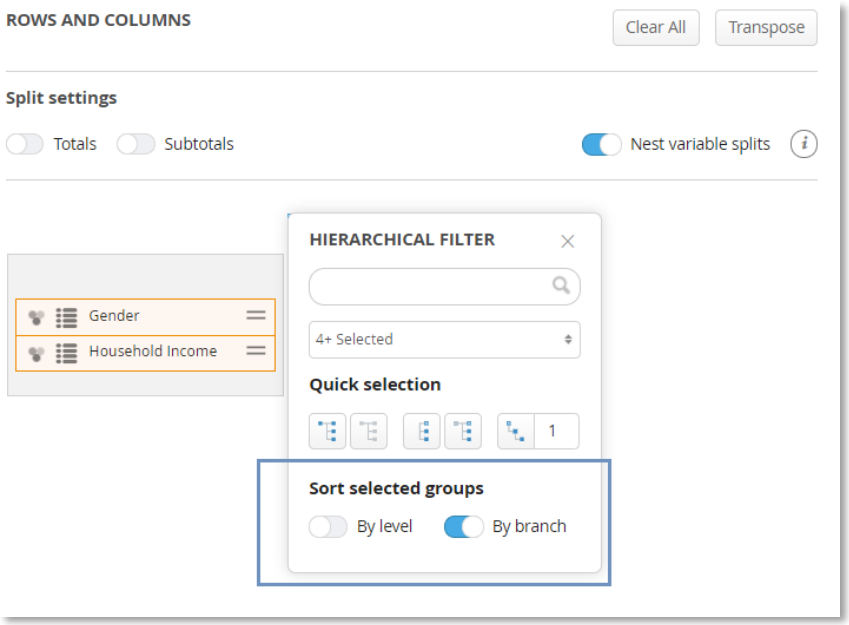
Here we see the new search function at the top of the panel, in the left image we see the full tree and in the right the result when searching for Stockholm.



6.2 Order hierarchical filter nodes by branch or level

When displaying multiple hierarchical filter nodes, in columns or rows, you can now specify if these will be ordered by branch or by level, previously these were always ordered by levels.

The new sorting setting in the hierarchical filter selection panel in the Columns and Rows tab.



Below we see an example of each sorting option. The countries and cities are all part of the hierarchical structure, in the top table these are sorted by level and in the bottom table by branch.

Sorted by level so countries are grouped and cities are grouped.

		Total	Denmark	Sweden	Copenhagen	Helsinör	Århus	Stockhom	Norrköping
		%	%	%	%	%	%	%	%
Gender	Man	49.5	38.4	53.0	21.6	47.6	43.5	56.2	35.7
	Woman	50.5	61.6	47.0	78.4	52.4	56.5	43.8	64.3
Household Income	Less than 25 000 Euro	7.2	20.1	3.1	35.8	24.0	0.0	2.9	6.6
	25 000-35 000 Euro	31.2	33.4	30.5	33.4	34.5	32.0	45.4	17.3
	35 001 - 45 000 Euro	17.9	21.1	16.9	7.5	25.2	29.4	7.6	19.8
	45 001- 55 000 Euro	22.7	12.0	26.1	15.1	9.9	11.5	26.0	24.6

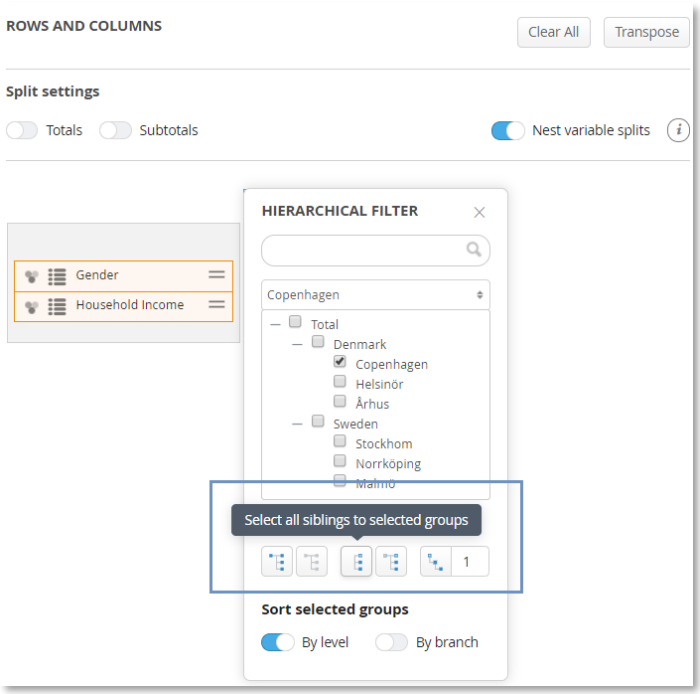
Sorted by branch so the cities within Denmark comes before Sweden.

		Total	Denmark	Copenhagen	Helsinör	Århus	Sweden	Stockhom	Norrköping
		%	%	%	%	%	%	%	%
Gender	Man	49.5	38.4	21.6	47.6	43.5	53.0	56.2	35.7
	Woman	50.5	61.6	78.4	52.4	56.5	47.0	43.8	64.3
Household Income	Less than 25 000 Euro	7.2	20.1	35.8	24.0	0.0	3.1	2.9	6.6
	25 000-35 000 Euro	31.2	33.4	33.4	34.5	32.0	30.5	45.4	17.3
	35 001 - 45 000 Euro	17.9	21.1	7.5	25.2	29.4	16.9	7.6	19.8
	45 001- 55 000 Euro	22.7	12.0	15.1	9.9	11.5	26.1	26.0	24.6

6.3 Quick selection in hierarchical filter tree

New “quick” selection option can now be used to select multiple hierarchical filter nodes more efficient, as an example you can now auto-select all child nodes to the selected node, all siblings to the selected node, all nodes X levels down from the selected node etc. This saves a lot of time as you don’t need to select all the desired nodes manually.

Here we see the new quick options, as shown a tooltip is shown to each option which explains what will be selected when the quick option is used.



Note, the access rights are always considered, only the nodes the user has access to are selected and displayed in the table.

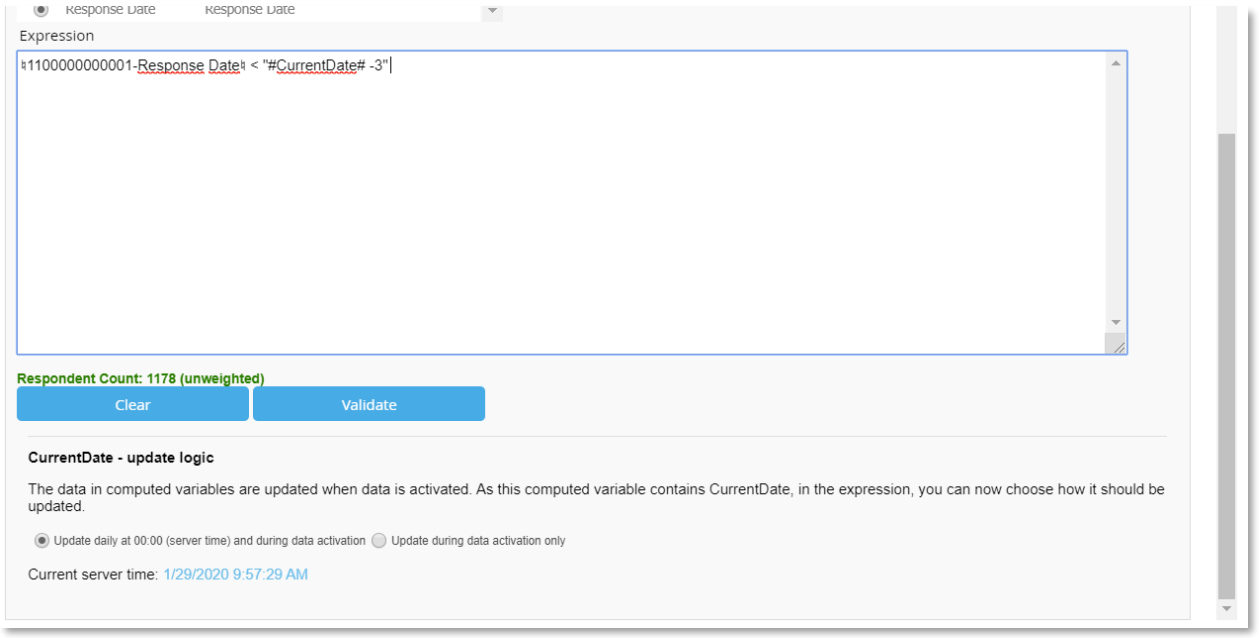
7 Computed & Input variables improvements

7.1 Auto update of data when #CurrentDate# is used in the expression

Computed and input variables using #CurrentDate# in the expression are often used in CX surveys with closed loops to identify delayed follow-ups etc. Until today the computed and the input variables using #CurrentDate# in the expression were only updated after data activation and hence to that only suitable to use in projects with daily data loads. Now these variables can be updated daily even without a data import/data activation.

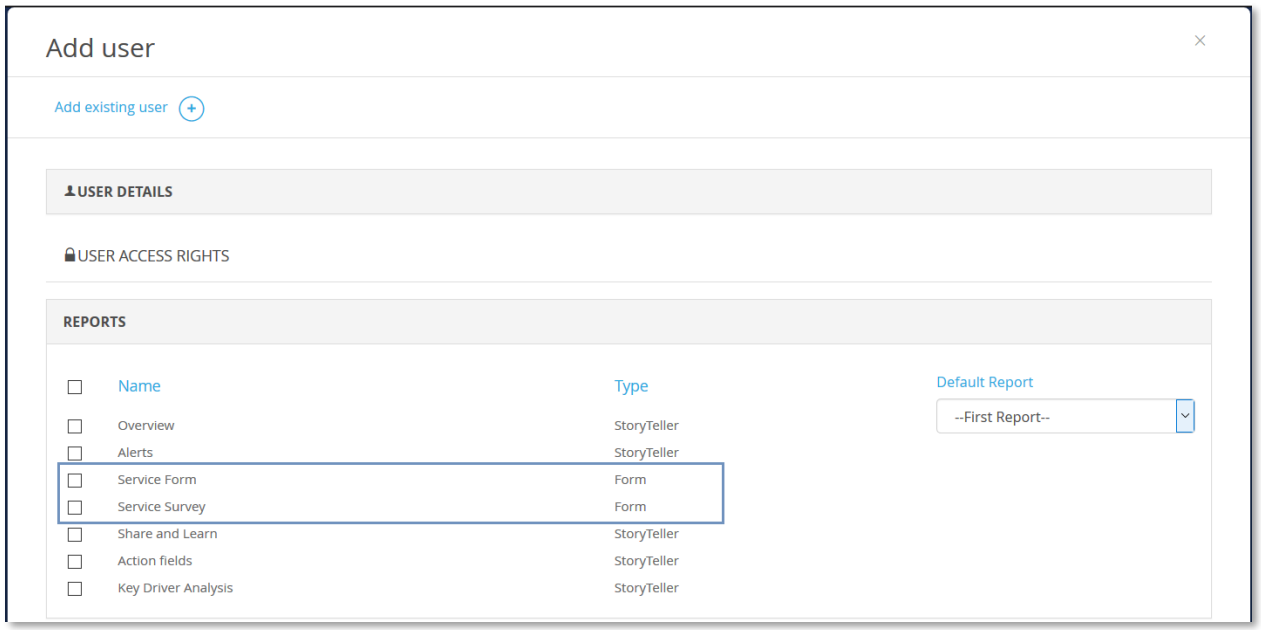
To preserve logic in existing computed/input variables a setting has been introduced so you can select behavior. In the image below you see the new setting (the setting appears only if the variable contains #CurrentDate# in the expression).

Here we see the new setting in the bottom of the page, tick the left option if the variable should be updated daily at 00:00 or the right if the variable shall be updated when a data activation is performed only.



8 Report user administration improvements

8.1 Form reports no longer shown in pages for setting access rights on Report Users

Form reports, mostly used in the closed loop process in CX projects, are no longer appearing in pages for setting access rights to Report users as the access to Forms, anyway, always have been based on the access to the Storyteller linking to the Form report. The users always got access to the Form if the user he/she had access to the StoryTeller linking to it.
To be clear, no changes in access rights logic have been made, the interface has just been made more user-friendly as the Form reports are removed.

Here we see how Form reports previously appeared in the ages for setting access rights on users, these Form reports will from now on not be shown in the Report user administration pages.