Dapresy 2020

May Release

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1 – Introduction

This document describes new and improved features in the Dapresy 2020 May 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

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2 - Overview

The Dapresy 2020 May 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:

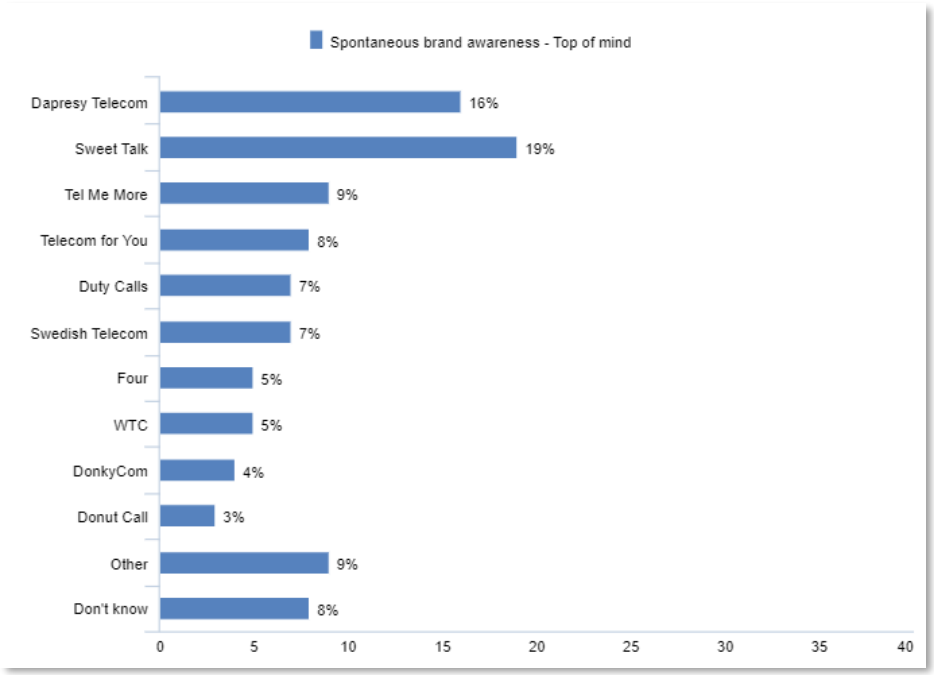
Improved value sorting

The following improvements are implemented in the Value sorting function in the StoryTeller, StoryCreator and Cross table tool.

- You can now specify, in a new project level setting, if value sorting should be based on all decimals or the displayed number of decimals. Previously value sorting was based on full values.

- You can now specify, on an Answer block level, if an answer option should be excluded from value sorting and be fixed at the top or on the bottom.

  Here we see an example of anchored answer alternatives, Other and Don't know are anchored on the bottom and Dapresy Telecom at the top, the rest of the brands are sorted by value.



- A new "Value sorting group" concept has been introduced so answers in an Answer block can be divided into different value sorting groups. Value sorting groups are useful when for instance using an answer list with key brands and non-key brands, models and sub models, topics and sub topics etc. in the same answer block as these now can be sorted by value within each group.

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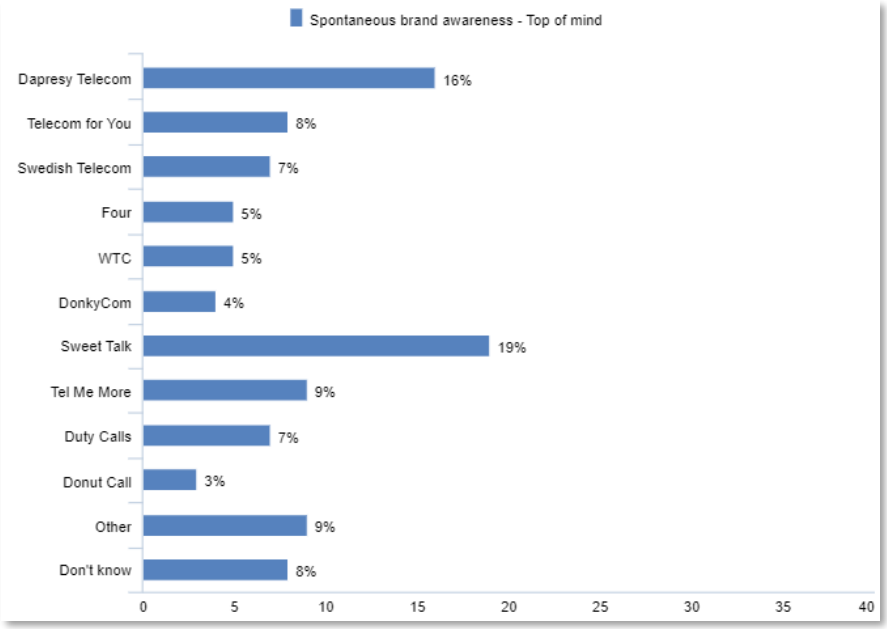
Here we see an example of two sorting groups in a chart, the top group is the brand of the client and the key competitors, the second group is the non-key brands. Also, Others and Don't know are anchored at the bottom.



- You can now specify if items with tied results should be sorted by the internal order or alphabetically. Previously tied items were sorted by the internal item order (e.g. the order in the Answer block or the order of the Questions).
  If tied result is sorted alphabetically in a project with a Hierarchical filter you can also choose if the alphabetical order should be applied across all levels in the hierarchical structure or within each level.

  Examples: a chart shows the H-filter level 2 nodes Asia and Europe and the level 3 nodes China, Japan, Denmark, and Sweden. If, hypothetically, the result of all these nodes are tied these can be sorted in any of the following ways:

  - Sort tied H-filter by internal order: Asia, China, Japan, Europe, Denmark, Sweden
  - Sort tied H-filter nodes alphabetically: Asia, China, Denmark, Europe, Japan, Sweden
  - Sort tied H-filter nodes alphabetically within each level, show highest level first: Asia, Europe, China, Denmark, Japan, Sweden
  - Sort tied H-filter nodes alphabetically within each level, show lowest level first: China, Denmark, Japan, Sweden, Asia, Europe

Improved Ranking

The following improvements are available in the Ranking function in the StoryTeller and Cross table tool.

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- You can now specify, in a new project level setting, if ranking sorting should be based on all decimals or the displayed number of decimals only. Previously ranking was based on all decimals.

- You can now show the number of ranked items as a suffix to the rank number, e.g. “3 of 15”.

Improved Benchmarking

These improvements have been implemented in the Benchmarking function in the StoryTeller, StoryCreator and Cross table tool.

- You can now specify, in a new project level setting, if benchmark calculations should be based on all decimals or the displayed number of decimals. Previously benchmarking was based on all decimals.

Statistical testing improvements

The following updates are available in the area of statistical testing

- A T-test can now be applied on numeric variables when using the numeric mean calculation in the StoryTeller and the StoryCreator. T- test on numeric means in Cross table tool and T-test for categorical means and proportions will be included in the next release.

- When running a statistical test between series in charts and tables, in the Storyteller, you can now select to test all values in the main series against a single value in the sub-series. Previously testing between series where done either via a text match or by the cell index so all values in main series could not be tested to a single value in the sub-series.

- When setting up a statistical test a base size and a respondent count limit can be specified to not run the test on low sample sizes. Previously the base size/respondent count had to be greater than the specified limits to run the test which made it impossible to perform a test against a 0 % result (as that respondent count is 0). The logic of these limits are now updated, the test will now run if the base size/respondent count is **equal to or greater** than the specified limits.

  Note: the updated logic is applied to newly created projects only and not to existing projects. In the project settings page you can choose which logic to be used meaning that you can use the new logic in old projects, if required.

- When running a statistical test on weighted results the base size limit can be based on weighted, unweighted or the effective base size. The setting to select which base size to be used was previously present in the StoryTeller and the StoryCreator but not in the Cross table tool. The setting is now also available in the Cross table tool.

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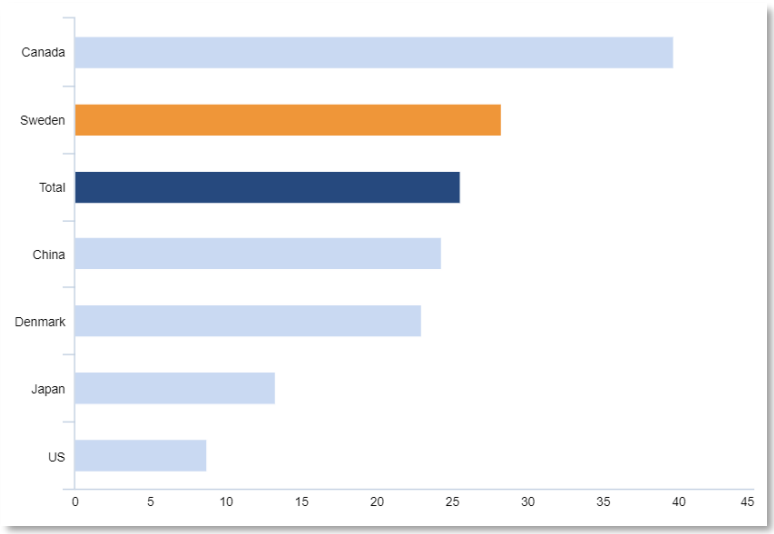
Base warnings and base size suppression

- The limits used to warn for low base size and suppressing results due to low base size could previously be specified per object in the Storyteller and StoryCreator and per table in the Cross table tool. New logic has now been implemented so these limits also can be specified globally on question level which makes the setup and maintenance more efficient. Also, the new logic supports having different limits per question in the same chart/table which were not previously supported as the limit was setup for the whole object.

StoryTeller charts

- In projects using Hierarchical filters you can now set the color on each Hierarchical comparison rule to create clearer distinctions between the different type of groups. As an example you can give the "selected group" a certain color, all the siblings another color and the Total a third color.

  Here we see an example of a chart where the selected group is orange, the siblings are light blue and the total is dark blue.



Variable administration

- In the Question block view, in the new Questions page, you can now sort the Question blocks by drag and drop. Sorting of Question blocks were previously available only in the legacy page "Sort order Question blocks" found under the old Question block administration page in the tool bar.

- In the questions page you can now open the Usage report from the context menu (available on right click), previously you had to select to show the Usage report column to enter the Usage report.

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Hierarchical filter mapping

- A new “Hierarchical filter mapping” function has been introduced which, together with a specific hierarchical filter setup, supports advanced wave over wave comparisons in, for example, employee satisfaction surveys where the organization changes between the waves. Below are sample cases of special wave over wave comparisons that now are supported when the new process is used:
    - **Example 1, unit split**: Team Green existed in 2019 but the team was split up into Team Green 1 and Team Green 2 in 2020. In the 2020 reporting both Team Green 1 and Team Green 2 should be compared to the result of Team Green in 2019
    - **Example 2, unit merge**: Team Blue 1 and Team Blue 2 existed in 2019 but the teams were merged into Team Blue in 2020. In the 2020 reporting the Team Blue should be compared to the aggregated result of Team Blue 1 and Team Blue 2 in 2019.
    - **Example 3, name change**: Team Pink in 2019 was renamed to Team Red in 2020. In the 2020 reporting Team Red should be compared to Team Pink in 2019
    - **Example 3, new unit**: Team Yellow is a new team in 2020. In the 2020 reporting Team Yellow should be compared to the result of the parent node in 2019 to get a comparison value.

Report user administration

- You can now, on a user level, specify a From and To date to limit project access to a pre-defined date window. If the current date is outside the specified From and To date the user will not have access to the project. The user is still kept in the project but treated as inactive. The From and To dates are optional and do not need to be defined if not required.

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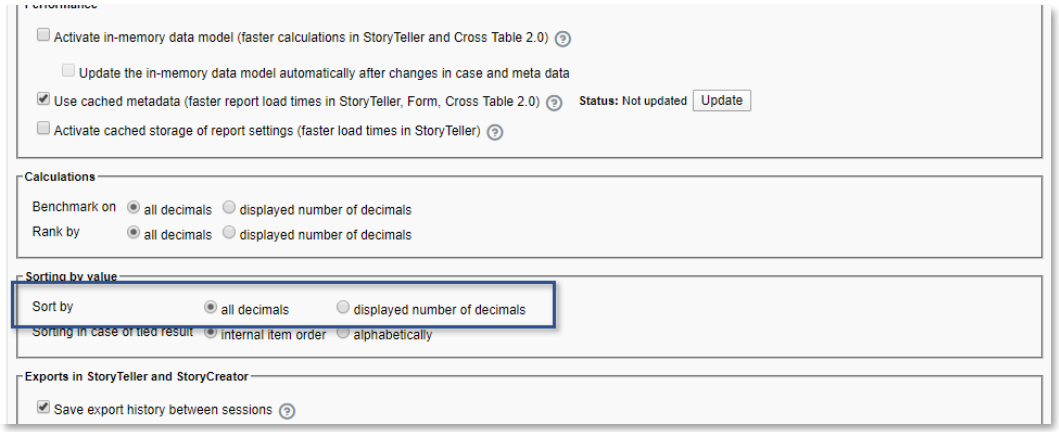
3 Improved value sorting

3.1 Sort by all decimals or displayed number of decimals

You can now specify, in a new project level setting, if value sorting should be based on all decimals or the displayed number of decimals. Previously value sorting was based on the full value before any rounding was applied.

Here we see the new project level setting, the setting is applied to all StoryTeller, StoryCreator and Cross table tool reports.



3.2 Anchoring of answers

You can now specify, on an Answer block level, if an answer option should be anchored at the top or on the bottom. An anchored answer option is excluded from value sorting. As the setting is defined on Answer block level it is applied to all StoryTeller, StoryCreator and Cross table tool reports.

Here we see an example of answers anchored at the top and the bottom, the result of these settings are shown in second image below.

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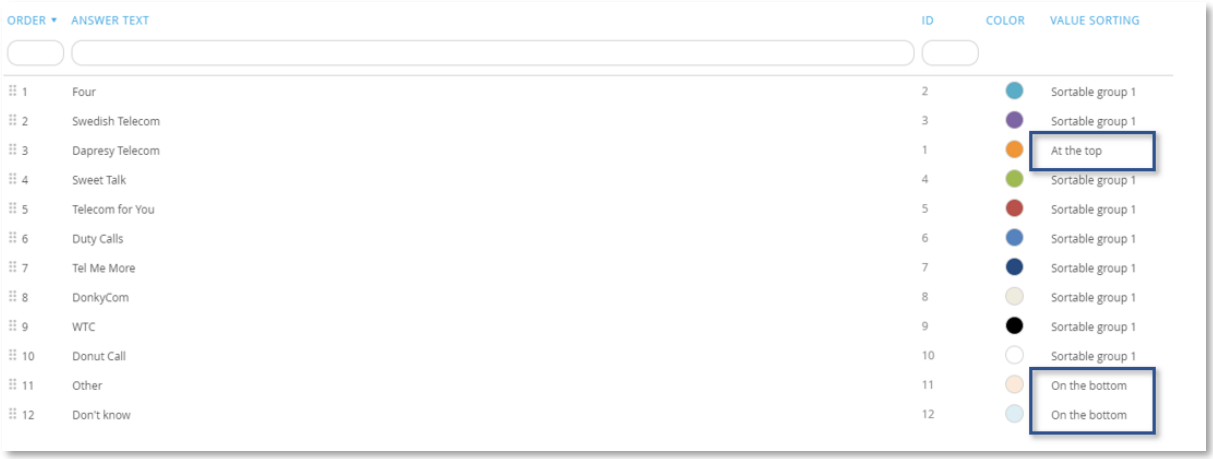
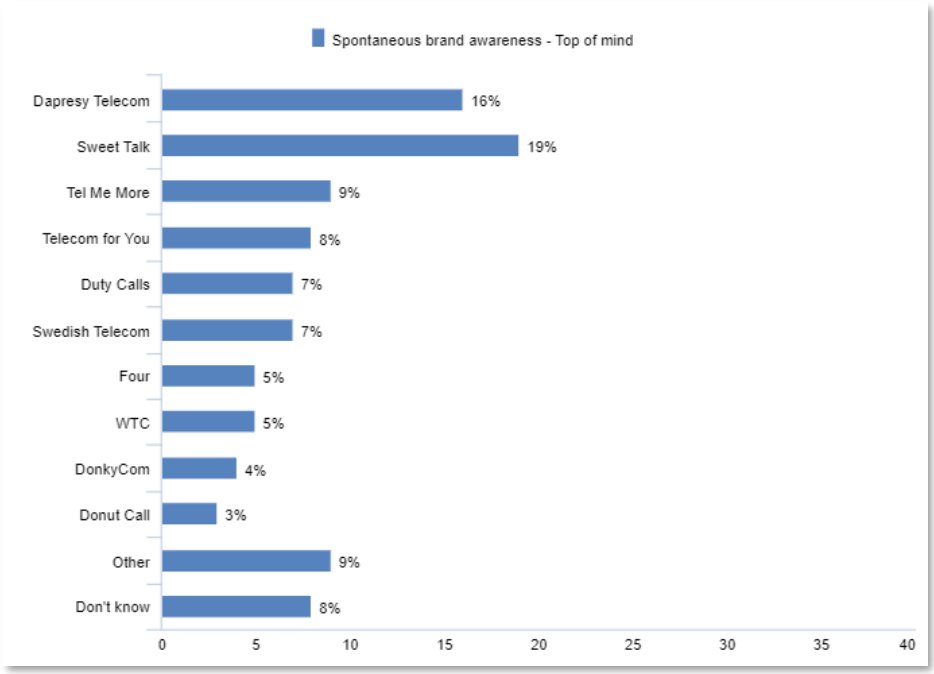


ORDER	ANSWER TEXT	ID	COLOR	VALUE SORTING
1	Four	2		Sortable group 1
2	Swedish Telecom	3		Sortable group 1
3	Dapresy Telecom	1		At the top
4	Sweet Talk	4		Sortable group 1
5	Telecom for You	5		Sortable group 1
6	Duty Calls	6		Sortable group 1
7	Tel Me More	7		Sortable group 1
8	DonkyCom	8		Sortable group 1
9	WTC	9		Sortable group 1
10	Donut Call	10		Sortable group 1
11	Other	11		On the bottom
12	Don't know	12		On the bottom

Here we see the result of the setting above when value sorting is applied to the chart. As shown Dapresy Telecom is anchored at the top and Other and Don't know at the bottom, the rest of the brands are sorted by value.



3.3 Value sorting groups

A new "Value sorting group" concept is introduced so answers in an Answer block can be divided into different value sorting groups. Value sorting groups are useful when for example having an answer list with key brands and non-key brands, models and-sub models, topics and sub-topics etc. in the same answer block as these now can be sorted by value within each group.

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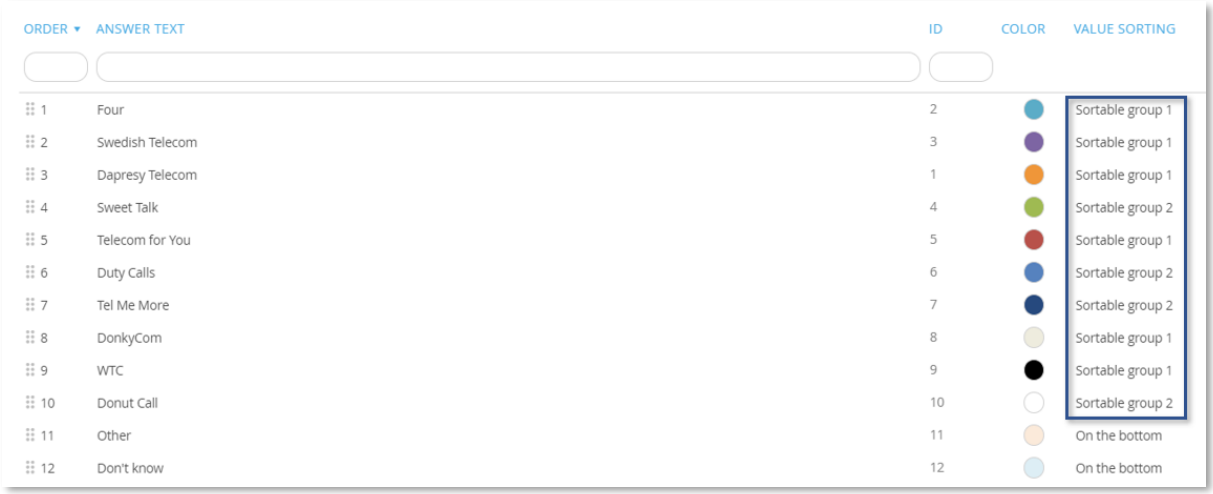
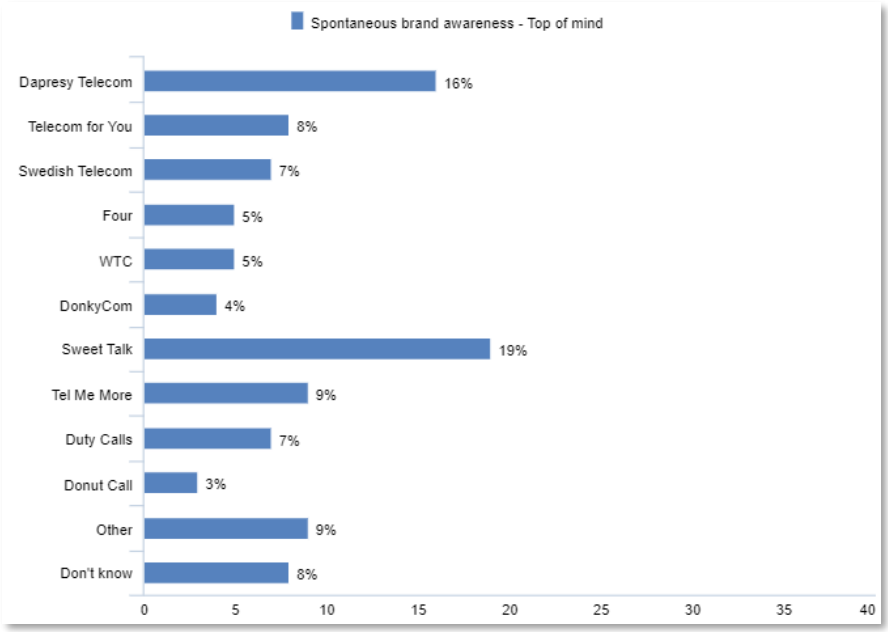
As shown in the image below the sorting groups are specified on an Answer block level so the sorting groups are applied to all StoryTeller, StoryCreator and Cross table tool reports when value sorting is used.

Here we see an example of a setup of two sorting groups, the "Sortable group 1" is the main brand and the key competitors, the "sortable group 2" is the non-key brands. Also, Other and Don't know are anchored at the bottom and excluded from value sorting. The result of these settings is shown in the second image below.



ORDER	ANSWER TEXT	ID	COLOR	VALUE SORTING
1	Four	2		Sortable group 1
2	Swedish Telecom	3		Sortable group 1
3	Dapresy Telecom	1		Sortable group 1
4	Sweet Talk	4		Sortable group 2
5	Telecom for You	5		Sortable group 1
6	Duty Calls	6		Sortable group 2
7	Tel Me More	7		Sortable group 2
8	DonkyCom	8		Sortable group 1
9	WTC	9		Sortable group 1
10	Donut Call	10		Sortable group 2
11	Other	11		On the bottom
12	Don't know	12		On the bottom

Here we see the result of the setting in previous image when applying value sorting.



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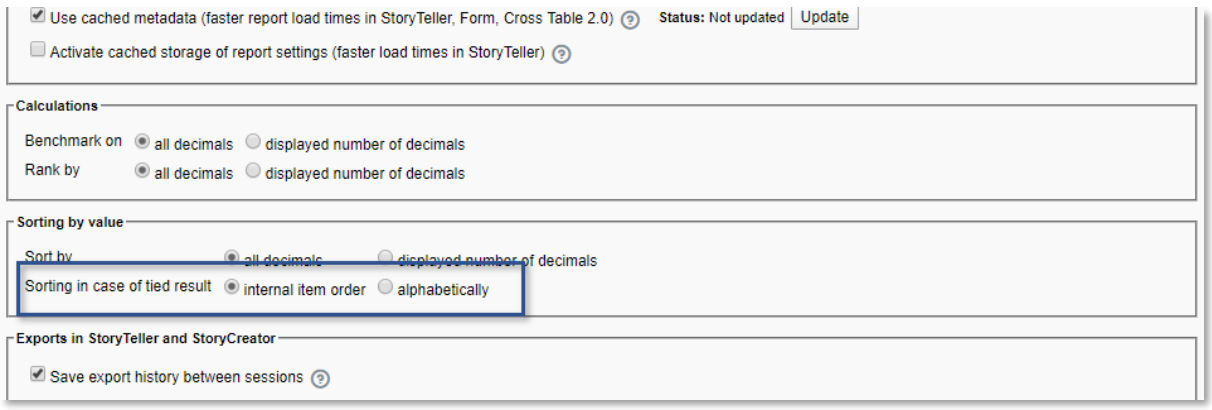
3.4 Sort tied results by the internal order or alphabetically

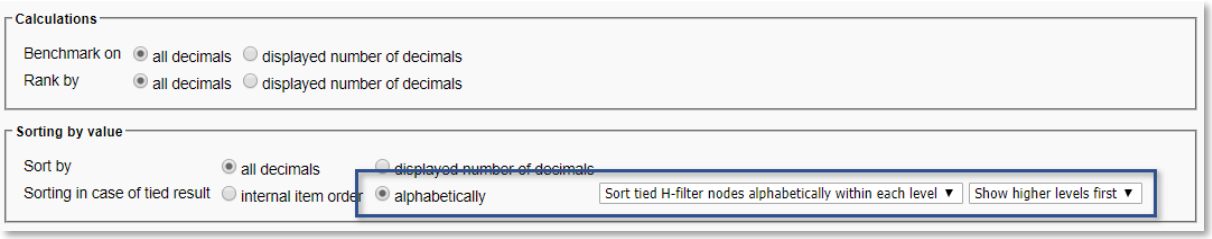
You can now specify if items with tied results should be sorted by the internal order or alphabetically. Previously tied items were sorted by the internal item order (e.g. the order in the Answer block or the order of the Questions).

Here we see the new project level setting.



If you select to sort tied results alphabetically in a project with a Hierarchical filter you can also choose if the alphabetical order should be applied across all levels in the hierarchical structure or within each level as shown in the image below.

Here we see the setting to specify how the alphabetical order should be applied to tied H-filter nodes.



Examples: a chart shows the H-filter level 2 nodes Asia and Europe and the level 3 nodes China, Japan, Denmark, and Sweden. If, hypothetically, the result of all these nodes are tied with the same value these can now be sorted in any of the following ways:

- Sort tied H-filter by internal order: Asia, China, Japan, Europe, Denmark, Sweden
- Sort tied H-filter nodes alphabetically: Asia, China, Denmark, Europe, Japan, Sweden
- Sort tied H-filter nodes alphabetically within each level, show highest level first**: Asia, Europe, China, Denmark, Japan, Sweden**
- Sort tied H-filter nodes alphabetically within each level, show lowest level first: **China, Denmark, Japan, Sweden, Asia, Europe**

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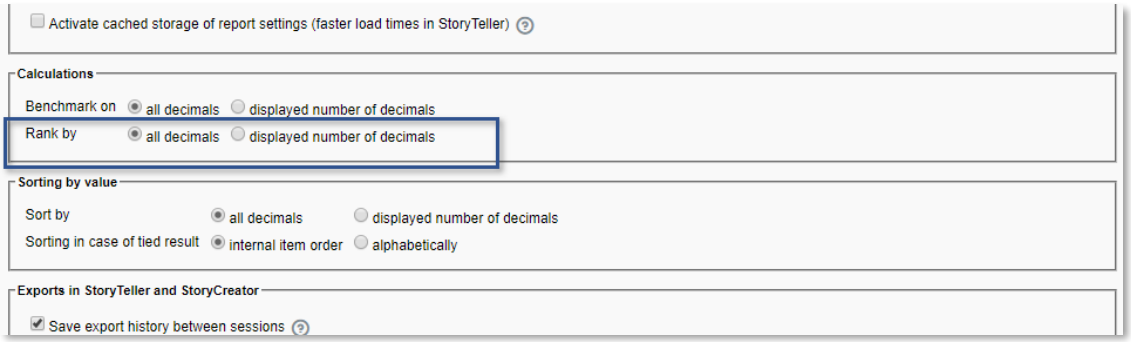
4 Improved Ranking

4.1 Rank by displayed number of decimals or all decimals

You can now specify, in a new project level setting, if ranking should be based on the full calculated value or the displayed number of decimals only. Previously ranking was based on all decimals.

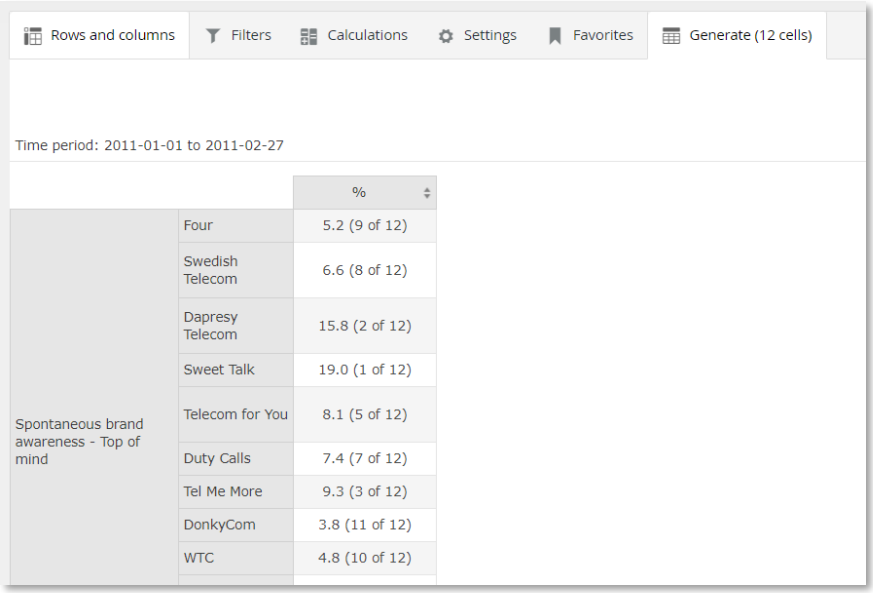
Here we see the new project level setting.



4.2 Display ranked number of items

You can now show the number of ranked items as a suffix to the rank number, e.g. “3 of 15”.

Here we see an example of a table in the Cross table tool showing the ranked number of items as a suffix.



		%
Spontaneous brand awareness - Top of mind	Four	5.2 (9 of 12)
	Swedish Telecom	6.6 (8 of 12)
	Dapresy Telecom	15.8 (2 of 12)
	Sweet Talk	19.0 (1 of 12)
	Telecom for You	8.1 (5 of 12)
	Duty Calls	7.4 (7 of 12)
	Tel Me More	9.3 (3 of 12)
	DonkyCom	3.8 (11 of 12)
	WTC	4.8 (10 of 12)

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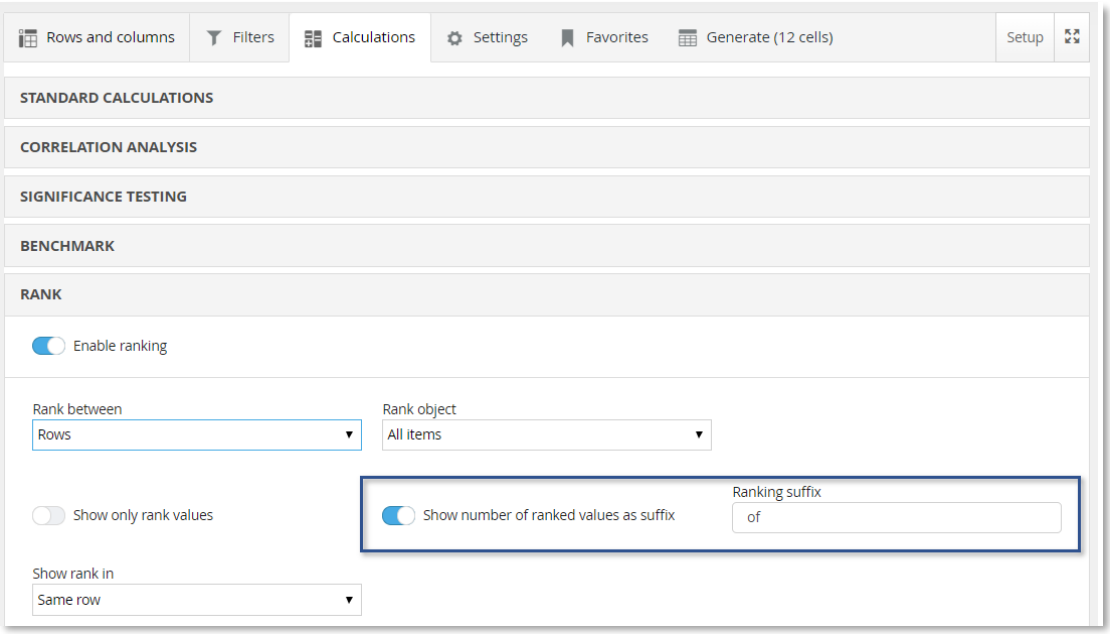
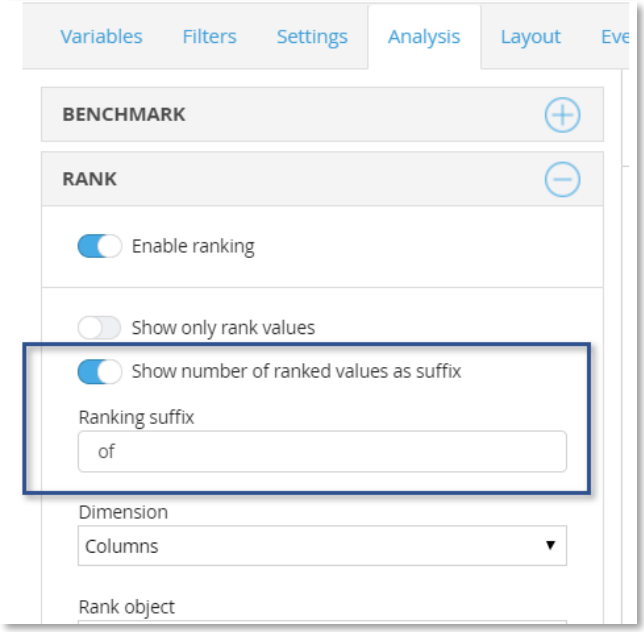
Here we see the new setting to be enabled to show the number of ranked items in Cross table tool.



Here we see the new setting to be enabled to show the number of ranked items in Storyteller table setup.



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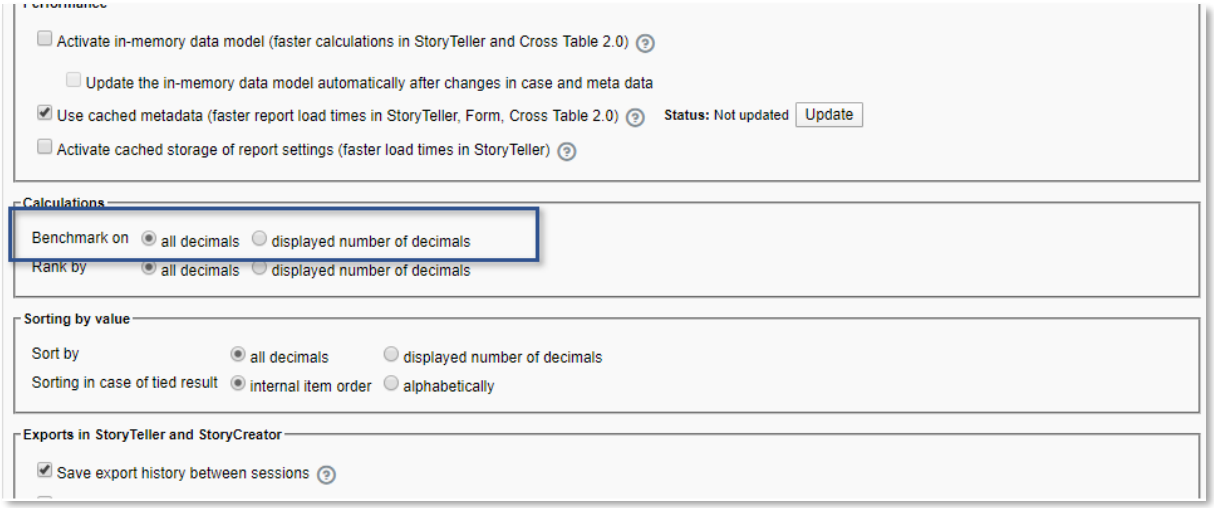
5 Improved Benchmarking

5.1 Benchmark by displayed number of decimals or all decimals

You can now specify, in a new project level setting, if benchmark calculations should be based on all decimals that have been calculated or the displayed number of decimals. Previously benchmark calculations were based on all decimals always.

Here we see the new project level setting.



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6 Statistical testing improvements

The following improvements are available in the area of statistical testing

6.1 Statistical testing on numeric variables (T-test)

A T-test can now be applied on numeric variables when using the numeric mean calculation in the StoryTeller and the StoryCreator. T- test on numeric means in Cross table tool and T-test for categorical means and proportions will be included in the next release.

Chapter 6.1.2 describes the used T-test formula and chapter 6.1.3-6.1.4 how to apply the T-test in a Storyteller/StoryCreator object.

6.1.2 Used T-test formula

This is the T-Test formula applied to the numeric mean calculation:

T test formula

$$T\ value = \frac{\bar{x}_1 - \bar{x}_2}{\sqrt{\frac{s_1^2}{n_1} + \frac{s_2^2}{n_2}}}$$

$\bar{x}_1 = mean\ value\ of\ sample\ 1$

$\bar{x}_2 = mean\ value\ of\ sample\ 2$

$s_1 = standard\ devitaion\ of\ sample\ 1\ (see\ formula\ further\ down)$

$s_2 = standard\ devitaion\ of\ sample\ 2\ (see\ formula\ further\ down)$

$n_1 = base\ size\ \ of\ sample\ 1$

$n_2 = base\ size\ \ of\ sample\ 2$

Note: all input values above are unweighted if the result is unweighted. If the result is weighted the $\bar{x}_1$, $\bar{x}_2$, s_1 and s_2 are weighted always but n_1 and n_2 are either weighted, unweighted or based on the effective base size. See more details in chapter 6.1.2.1

Standard deviation formula

Standard deviation formula used when result is unweighted:

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$$s = \frac{\sqrt{\sum (x - \bar{x})^2}}{n - 1}$$

$x = the\ value\ of\ the\ respondent$

$\bar{x} = mean\ value\ of\ sample$

$n = base\ size$

Standard deviation formula used when result is weighted:

$$s = \frac{\sqrt{\sum w(x - \bar{x})^2}}{n - 1}$$

$w = the\ weight\ of\ the\ respondent$

$x = the\ unweighted\ data\ of\ the\ respondent$

$\bar{x} = the\ weighted\ mean\ value\ of\ the\ sample$

$n = the\ weighted\ base\ size$

Critical value

The critical values used when determining if the result is significant or not is based on the Degrees of freedoms which is calculated as below.

$$Degrees\ of\ freedom\ = n_1 + n_2 - 2$$

$n_1 = base\ size\ \ of\ sample\ 1$

$n_2 = base\ size\ \ of\ sample\ 2$

Note, n_1 and n_2 are always the unweighted base sizes, even if the result is weighted.

If degrees of freedom > 1500 the following critical values are used:

- Confidence Interval 90% = 1.64485362695147
- Confidence Interval 95% = 1.95996398454005
- Confidence Interval 99% = 2.57582930354890

If degrees of freedom ≤ 1500 the "critical value" table is referenced.

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6.1.2.1 Used base size in T-test formula when result is weighted

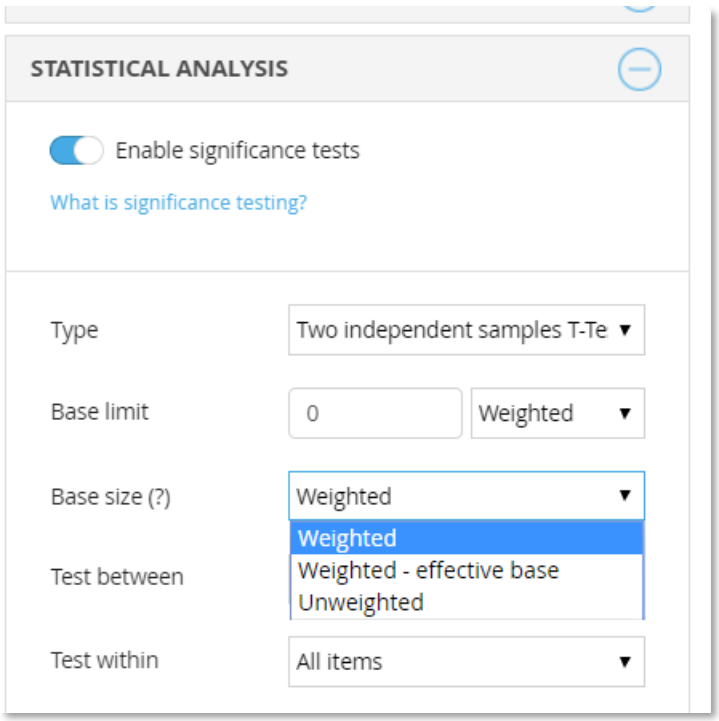
All input values in the T-test formula are unweighted if the result is unweighted, if the result is weighted the $\bar{x}_1$, $\bar{x}_2$, s_1 and s_2 are weighted always but base sizes (n_1 and n_2) are either weighted, unweighted or based on the effective base size.

Here we see the base size in the formula which can be either weighted, unweighted or the effective base size.

$$T\ value = \frac{\bar{x}_1 - \bar{x}_2}{\sqrt{\frac{s_1^2}{n_1} + \frac{s_2^2}{n_2}}}$$

Which base size to be used is specified by the user when setting up a chart/table. As shown below, the user can select if the base size should be the weighted, unweighted or based on the effective base size.

Here we see the base size selection when applying a T-test on weighted result.



Note: when applying a Z test on categorical variables you choose between the following base sizes to be used in the formula when result is weighted: Weighted, Weighted - effective base, Unweighted - Option A, Unweighted - Option B. The Unweighted - Option B in the Z test is the same as the Unweighted option in the T-test. The Unweighted Option A is not available when applying a T-test on numeric means.

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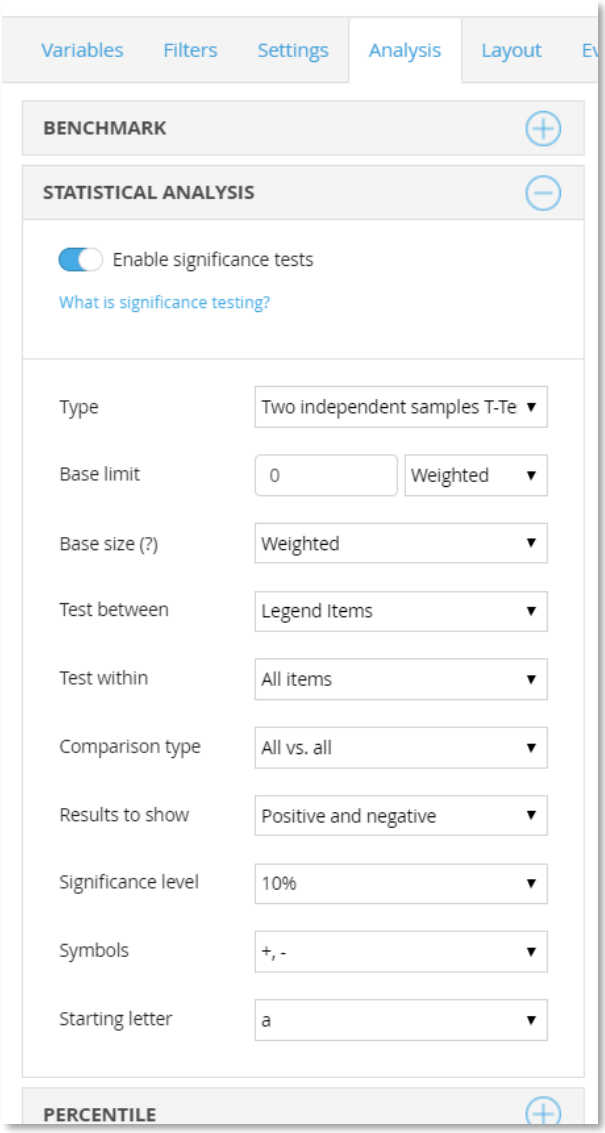
6.1.3 StoryTeller setup

In StoryTeller charts and tables the T-test option appears in the Statistical analysis panel when Numeric means is the selected calculation type. The settings are the same as when applying a Z test on categorical means.

Here we see how to apply a T-test in a StoryTeller chart.



Tip, when running a test to one (1) other data point you can select to display the T value, Standard deviations, Degrees of freedom and Critical value in the chart tooltip. The purpose of this function is to give the administrators the ability to check which values used in the calculations.

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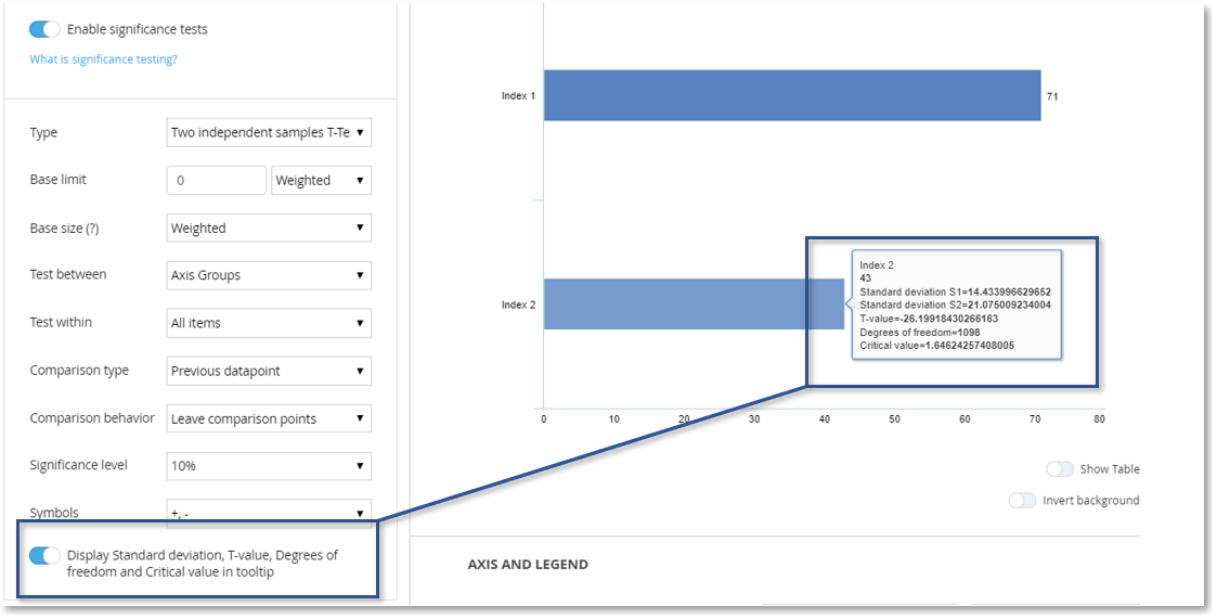
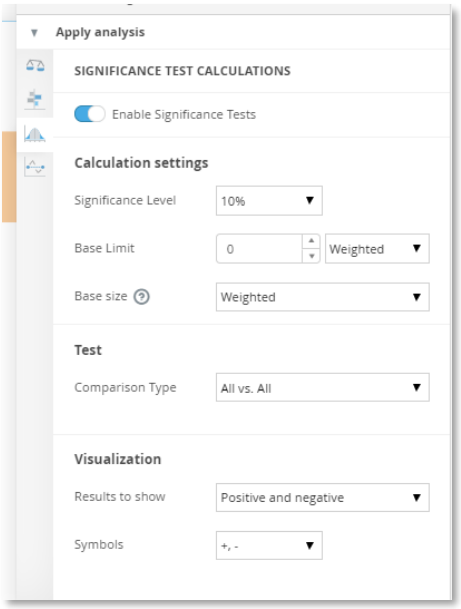
Here we see the setting for showing the used values in the T-test calculation in the chart tool tip. This option is not present when "All vs All" is selected in the Comparison type list.



6.1.4 StoryCreator setup

In StoryCreator charts and tables the T-test option appears in the Statistical analysis panel when Numeric means is the selected calculation type. The settings are the same as when applying a Z test on categorical means.

Here we see how to apply a T-test in a StoryCreator chart.



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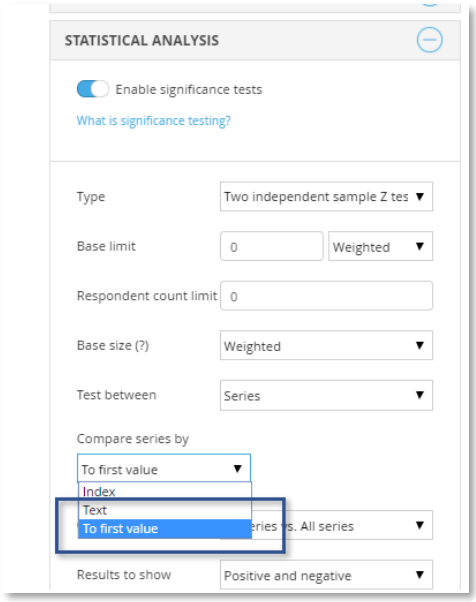
6.2 Statistical testing between series in StoryTeller

When running a statistical test between series in charts and tables, in the Storyteller, you can now select to test all values in the main series against a single value in the sub-series. Previously testing between series where done either via a text match or by the cell index so all values in main series could not be tested to a single value in the sub-series.

Here we see the new option that appears when running a statistical test between series in Storyteller charts and tables.



6.3 Updated base size and respondent count limits

When setting up a statistical test a base size and a respondent count limit can be specified to not run the test on a too low sample size.
Previously the base size/respondent count had to be greater than the specified limits to run the test which made it impossible to perform a test against a 0 % result (as that respondent count is 0).
The logic of these limits are now updated, the test will now run if the base size/respondent count is equal to or greater than the specified limits.

Note, the updated logic is applied to newly created projects only and not to existing projects. In the project settings page you can choose which logic to be used meaning that you can apply the new logic also in older projects.

Here we see the new option in the Project settings page that can be used to apply the new logic to older projects. The setting is applied to Storyteller, StoryCreator and Cross table tool.

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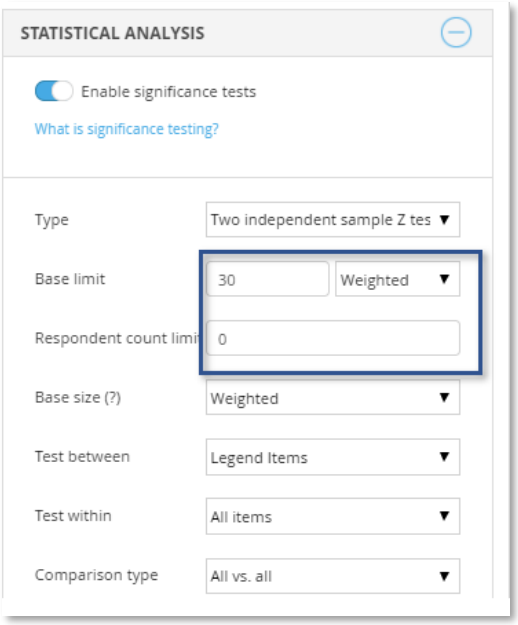
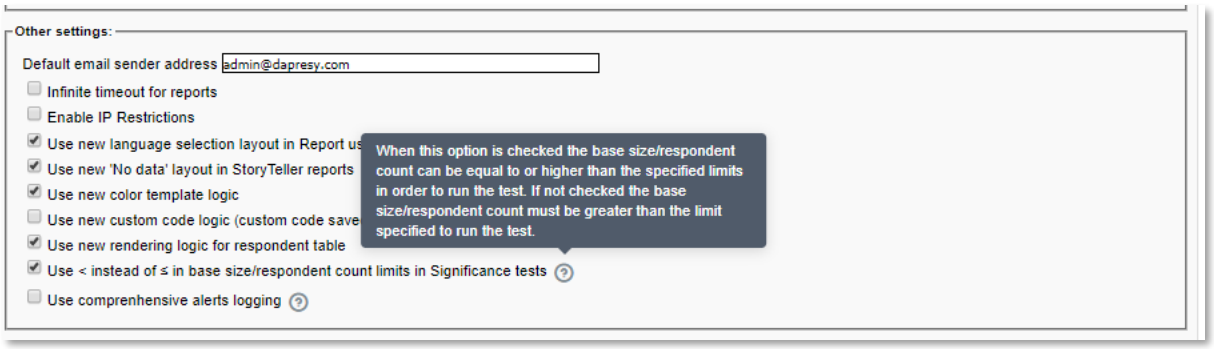


Here we see the setting in the Project settings page used to change logic, this option is ticked by default in all newly created projects but not in all projects created before this logic was introduced.



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7 Base warnings and suppression – question level setting

The limits used to warn for low base size and suppressing results due to low base size were previously specified per object in the Storyteller and StoryCreator and per table in the Cross table tool. New logic has now been implemented so these limits also can be specified globally on question level which makes the setup and maintenance more efficient. Also, the new logic supports having different limits per question in the same chart/table which were not previously supported as the limit was setup for the whole object.

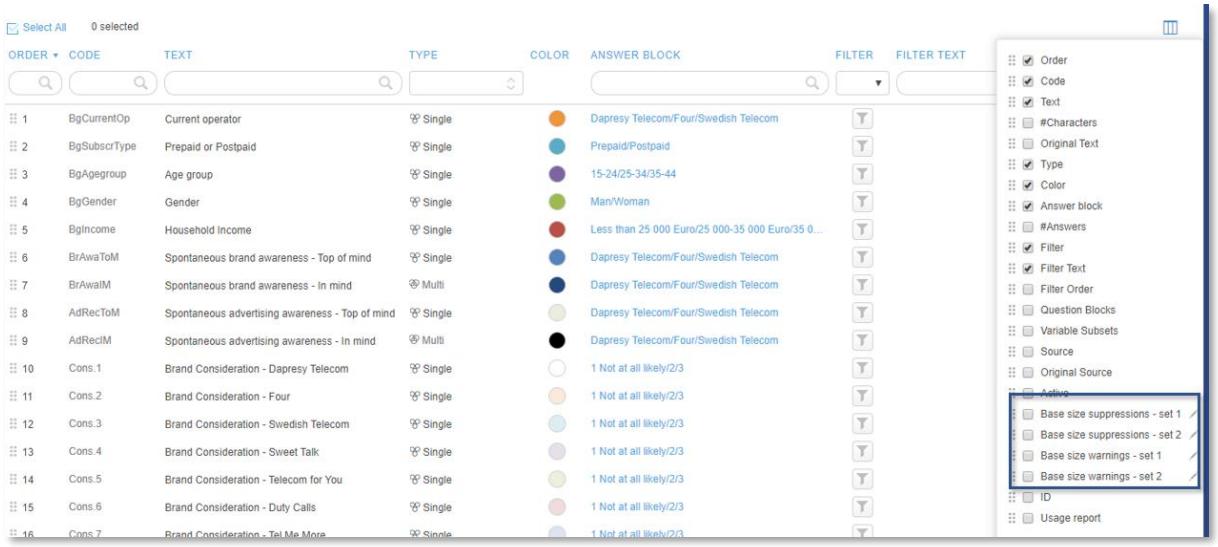
Chapter 7.1 describes how to define the limits on Question level and chapter 7.2-7.3 how to apply those to the StoryTeller, StoryCreator and the Cross table tool.

7.1 Setup of question level limits

The question level base warning and base suppression limits are defined in the Questions page. Each question has two sets of Warning limits and two sets of Suppression limits. When setting up an object in StoryTeller, Story Creator or the Cross table tool you can then select if any of these sets or if a “custom” limit should be applied (custom limit= a limit specified per object, this is the previous supported logic).

In the Question page the base size warning and suppression sets are hidden by default but can be turned on in the column panel as shown below.

Here we see the new columns in the column panel.



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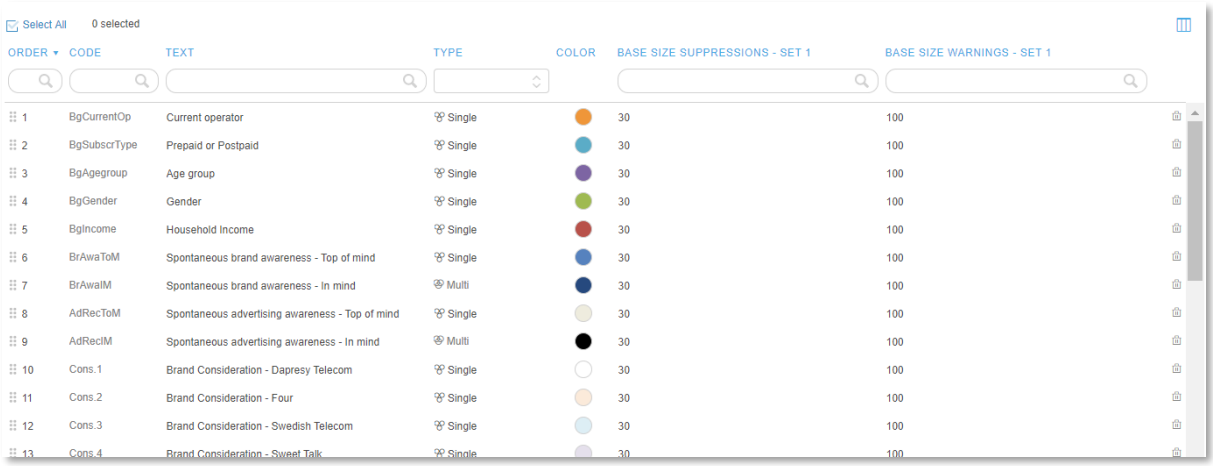
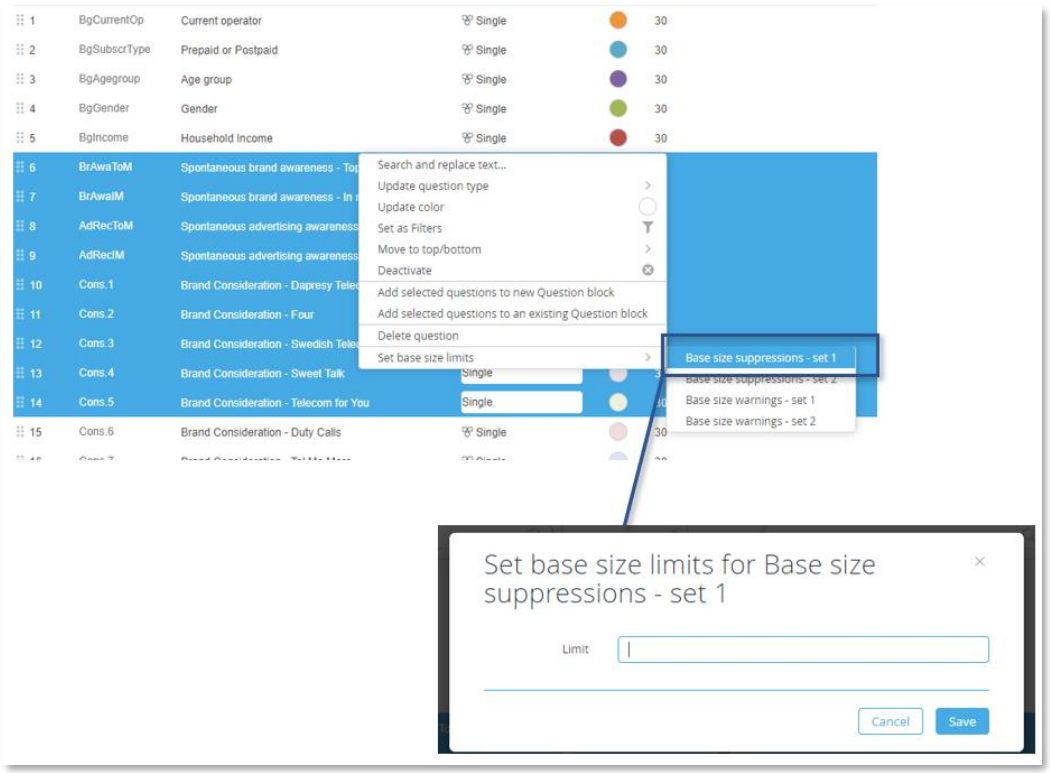
Here we see an example when the Base size suppression set 1 and Base size warning set 1 columns have been enabled, the base warning limits have been set to 100 and the base suppression limit to 30.



Tip 1, either you enter the limit question by question directly in the grid or you select multiple questions and bulk set the limits via the context menu as shown below.

Here we see the bulk update option which is applied to all selected questions.



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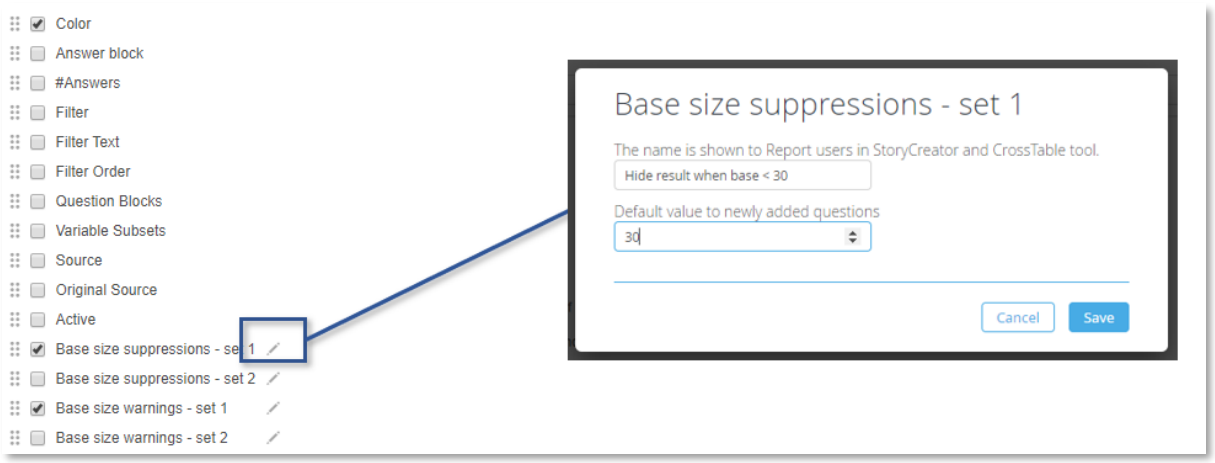
Tip 2: The names of the Base size warning and suppression sets are shown in the StoryTeller, StoryCreator and the Cross table tool interface (see details in the following chapters) so these named can be edited in order to make the names relevant for the users. As an example, the Base size suppression set 1 can be renamed to “Hide result with base < 30” if the base size limit has been set to 30. In the edit panel you can also specify a default value to be set on all newly added questions in the project (newly imported questions or new computed variables etc.)

Here we see the Edit panel used to rename the sets and to set a default value to be applied on newly added questions.



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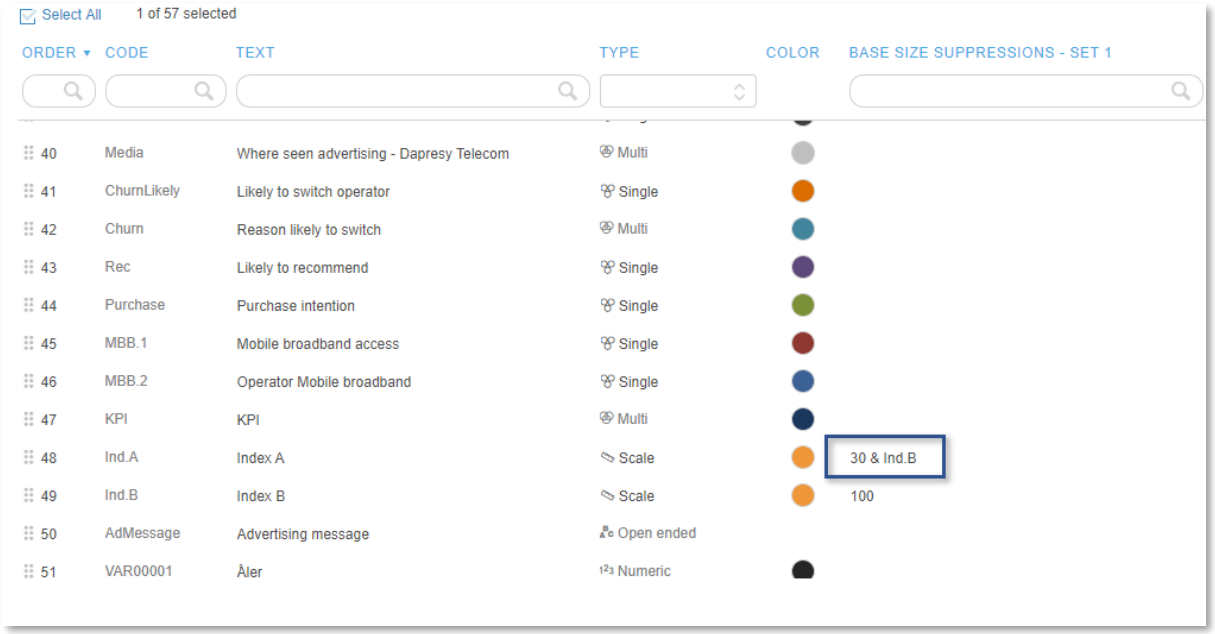
7.1.2 “Two layer” base size rule

A “two layer” base size logic has also been implemented which means that a question must fulfill both the limit specified on the current question a referenced question.

Example: Index A should be shown only if the base is s minimum 30 respondents and if the base of Index B is minimum 100 respondents, if both these limits are not fulfilled the Index A should not be shown.

To setup a Two layer base size rule the question code of the second question to be referenced is inserted in the limit field as shown in the example below.

Here we see an example of a two layer base size rule, with this setup the Index A will be shown only if the base size of the Index A is minimum 30 and the base size of Index B is minimum 100.



Note 1, the referenced question must not be shown in the chart/table together with the current question, In the example above it is enough to show Index A in a chart/table, the base size of index B will still be calculated and evaluated even if Index B is not shown in the chart/table.

Note 2, a numeric question can reference another numeric question only and a categorical question can reference another categorical question only.

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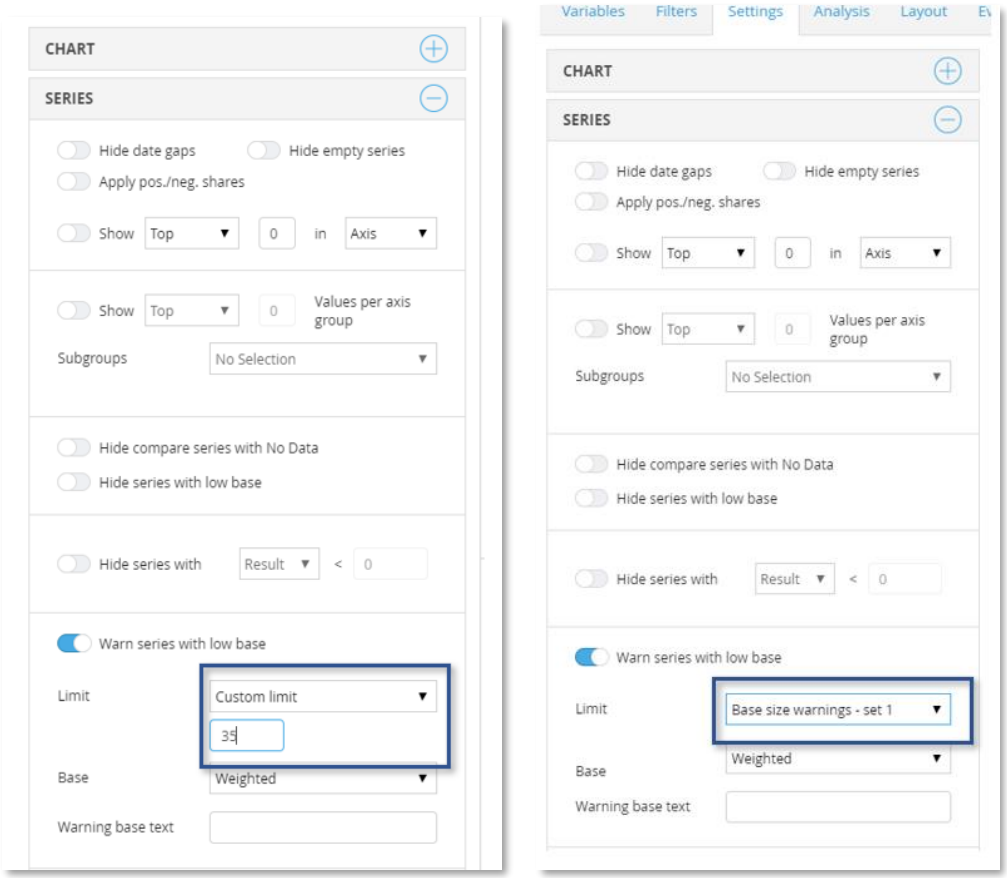
7.2 Applying question level limits to StoryTeller objects

When setting up a base size warning or base size suppression limit in a StoryTeller object you can now select if a custom limit (the previous supported option) or if any of the predefined sets should be applied. If the custom limit option is selected you have, like before, to enter the desired limit in the object setup, if any of the predefined sets are selected the limits specified in the Questions page will be applied.

Here we see an example of the custom limit option to the left, as shown you need to specify the limit to be used. To the right we see an example of applying the Base size suppression set 1, in this case the limits specified in the Questions page are applied to each question in the relevant object.



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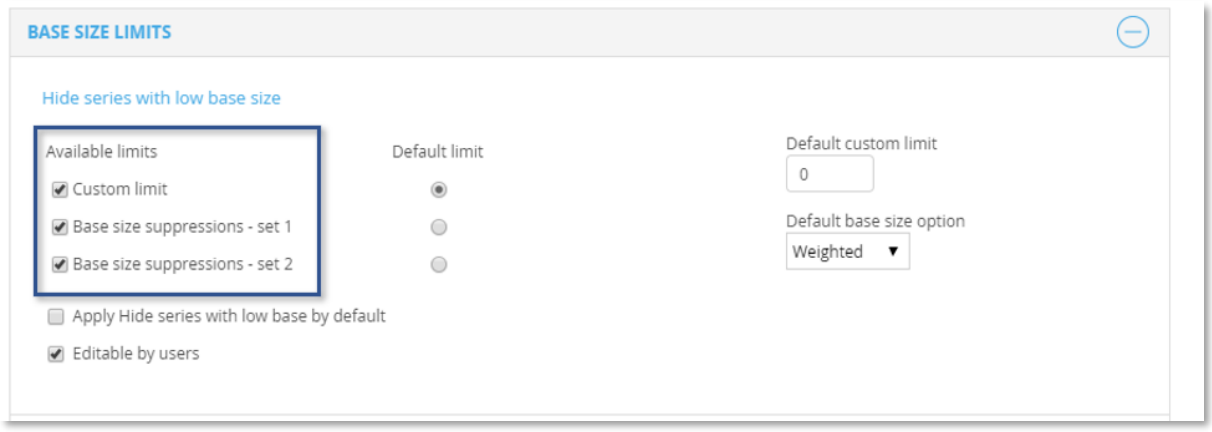
7.3 Applying question level limits to StoryCreator and Cross table tool

The selection of base size limits to be applied, custom or any of the predefined sets, to StoryCreator objects and Cross table tool tables works in same way as in the StoryTeller objects (see previous chapter). Though, the custom limit option is the only enabled option by default in StoryCreator and Cross table tool reports so if any of the predefined sets should be available for the users these must first be activated in the StoryCreator/Cross table tool Setup.

Here we see the base size section in the StoryCreator/Cross table tool setup, to use any of the predefined sets you need to enable those and then these are available for the users of the StoryCreator and the Cross table tool.



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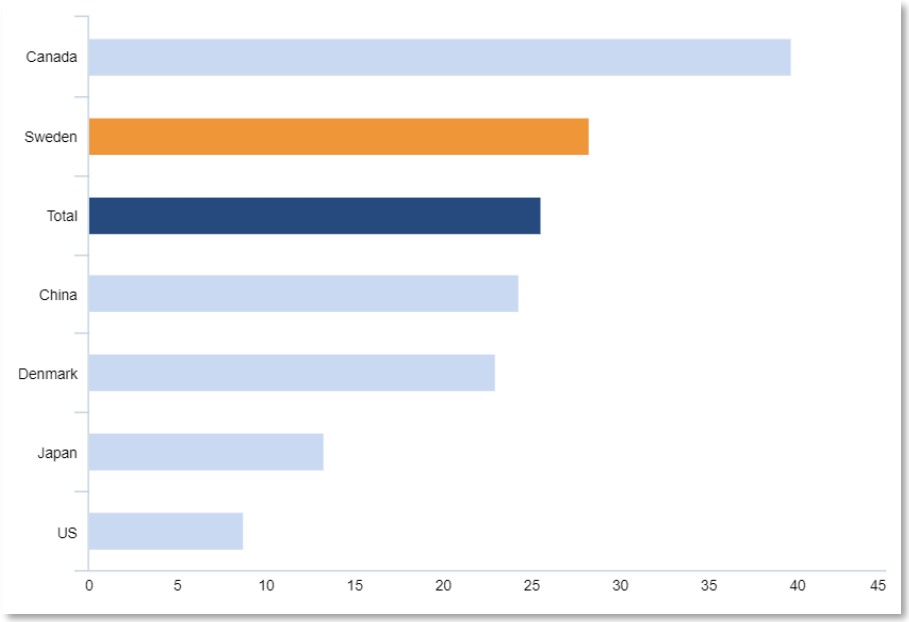
8 Storyteller charts

8.1 Color chart series by H-filter comparison rules

In projects using Hierarchical filters you can now set the color on each Hierarchical comparison rule to create clearer distinctions between the different type of groups. As an example you can give the “selected group” a certain color, all the siblings another color and the Total a third color.

Here we see an example of a chart where the selected group is orange, the siblings are light blue and the total is dark blue.



To set the colors on each Hierarchical comparison rule you first need to select the option “H-filter comparison group” in color source control (see first image below) and then you can set a color on each rule (see second image below).

Here is the option to be selected in the Color source control in order to set a color on each Hierarchical comparison rule.

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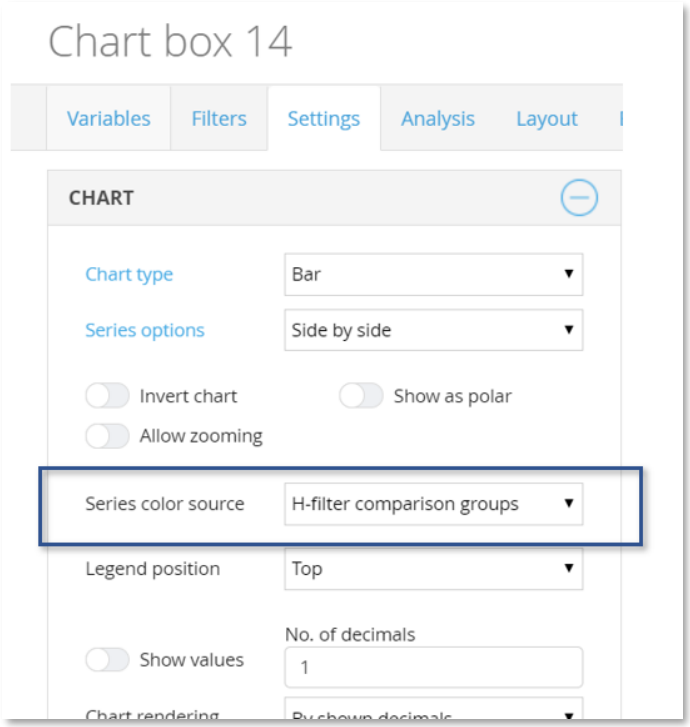
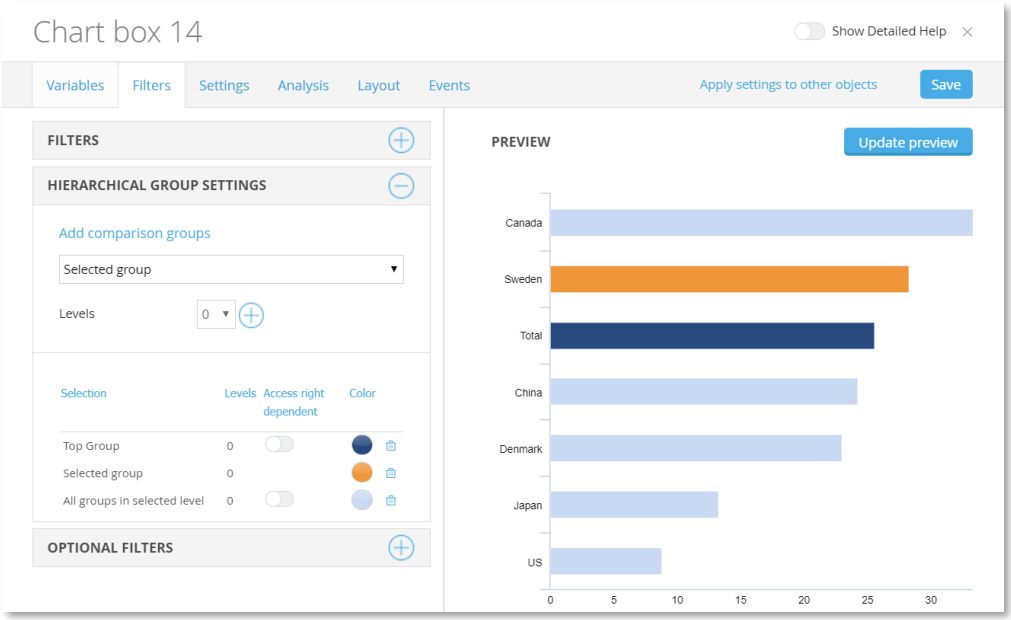


Here we see how you now can set a color on each Hierarchical comparison rule.



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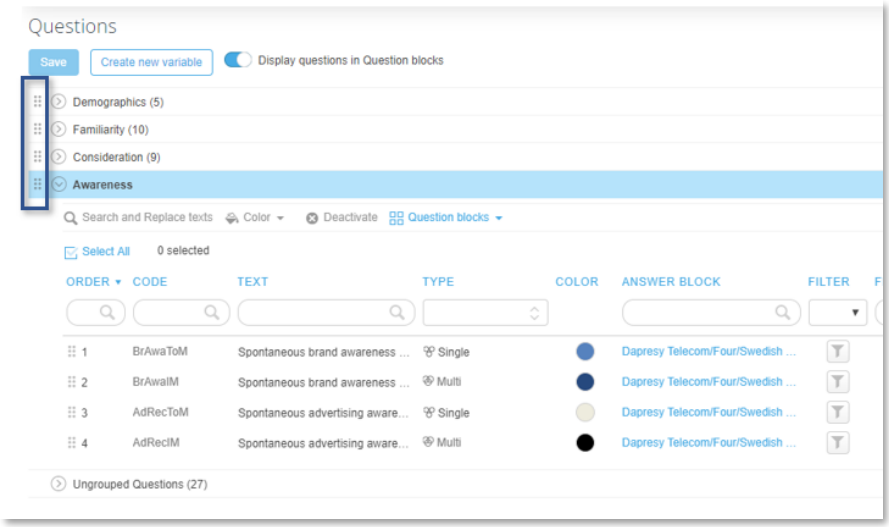
9 Variable administration

9.1 Update sort order of Question blocks

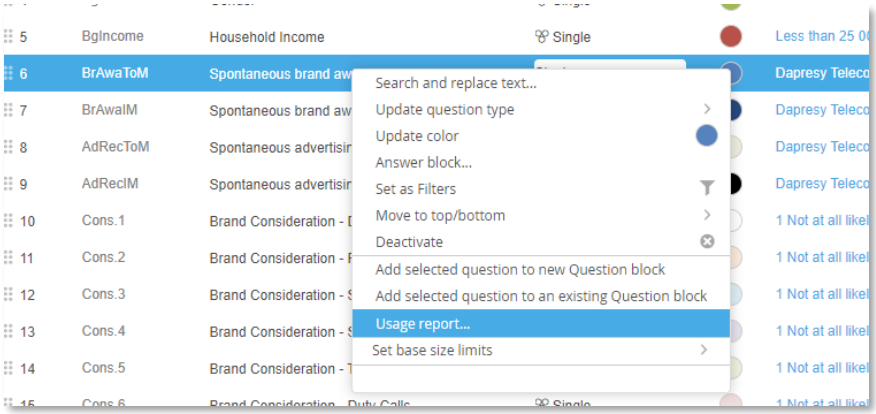
In the Question block view, in the new Questions page, you can now sort the Question blocks by drag and drop. Sorting of Question blocks were previously available in the old page “Sort order Question blocks” which was found under the Question Blocks page in the menu.

Here we see the new “drag & drop” icons used to change sort order of Question blocks in the new Questions page.



9.2 Open Usage report from context menu

In the questions page you can now open the Usage report from the context menu (appearing on right click), previously you had to turn on the Usage report column to enter the Usage report.



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10 Hierarchical filter mapping

A new “Hierarchical filter mapping” function has been introduced which, together with a specific hierarchical filter setup, supports advanced wave over wave comparisons in employee satisfaction surveys where the organization changes between the waves. Below we see a couple of examples of special wave over wave comparisons that are supported when the new process is used:

***Example 1, unit split**: Team Green existed in 2019 but the team was split up into Team Green 1 and Team Green 2 in 2020. In the 2020 reporting both Team Green 1 and Team Green 2 should be compared to the result of Team Green in 2019*

***Example 2, unit merge**: Team Blue 1 and Team Blue 2 existed in 2019 but the teams were merged into Team Blue in 2020. In the 2020 reporting the Team Blue should be compared to the aggregated result of Team Blue 1 and Team Blue 2 in 2019.*

***Example 3, name change**: Team Pink in 2019 was renamed to Team Red in 2020. In the 2020 reporting Team Red should be compared to Team Pink in 2019*

***Example 3, new unit**: Team Yellow is a new team in 2020. In the 2020 reporting Team Yellow should be compared to the result of the parent node in 2019 to get a comparison value.*

The overall process to be used when these types of wave over wave comparisons are required is show in chapter 1.1 and the functionality of new “Hierarchical filter mapping” page is explained in chapter 1.2.

10.1 Process

To achieve the special wave over wave comparison the following overall steps need to be followed, see more details about each step further down.

- Create a Hierarchical filter structure with one branch per wave
- Map each node in latest wave, that should have a wave over wave comparison, to one or several nodes in previous wave. The new Hierarchical filter mapping page is used for this
- In the reports, display the branch of the latest wave only as that branch reflects the current company organization. Also apply a wave split in each chart/table so result is split up per wave

1 Create a Hierarchical filter structure with one branch per year

Create a Hierarchical filter structure with one branch per wave. Below we see an example, as shown the Hierarchical filter structure contains one branch for 2019 and one for 2020. To achieve this structure, you need a categorized wave variable in the Hierarchical filter definition, this wave variable can be imported through data file or computed in the system by for example using response date in the expression.

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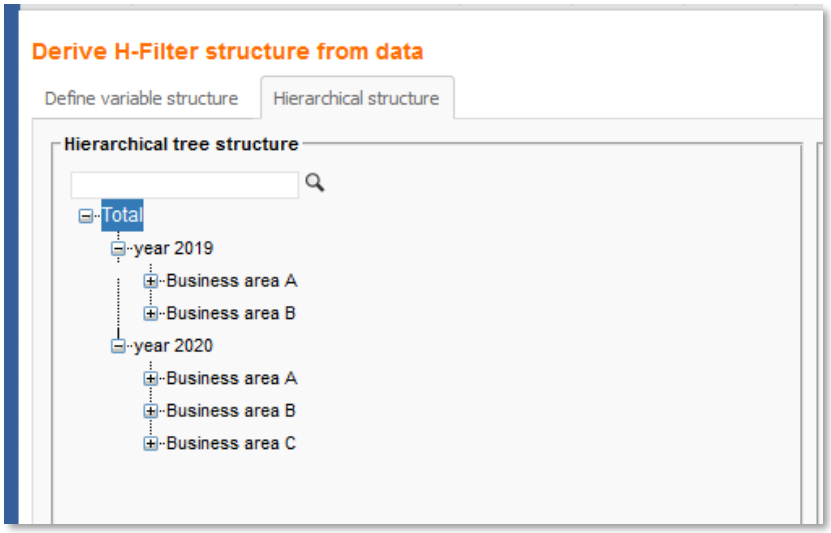
Here we see how the Hierarchical structure should be built.



2 Map each node in latest wave to one or several nodes in previous wave

In the mapping step, in the new Hierarchical filter mapping page, specify the wave over wave comparisons for each node in latest wave. You can apply auto-mappings based on name matches, so nodes with same names in both waves are compared to each other automatically. You can also manually select the nodes to be compared when nodes have changed names, nodes were merged or split up etc.

Also, an Excel download/upload option can be used if you would like to specify the mappings in Excel and then upload those.

Here we see the new mapping page, see more instructions in next chapter. In this example we see that Team Blue in 2020 should be compared to the aggregates result of Team Blue 1 and Team Blue 2 in 2019.

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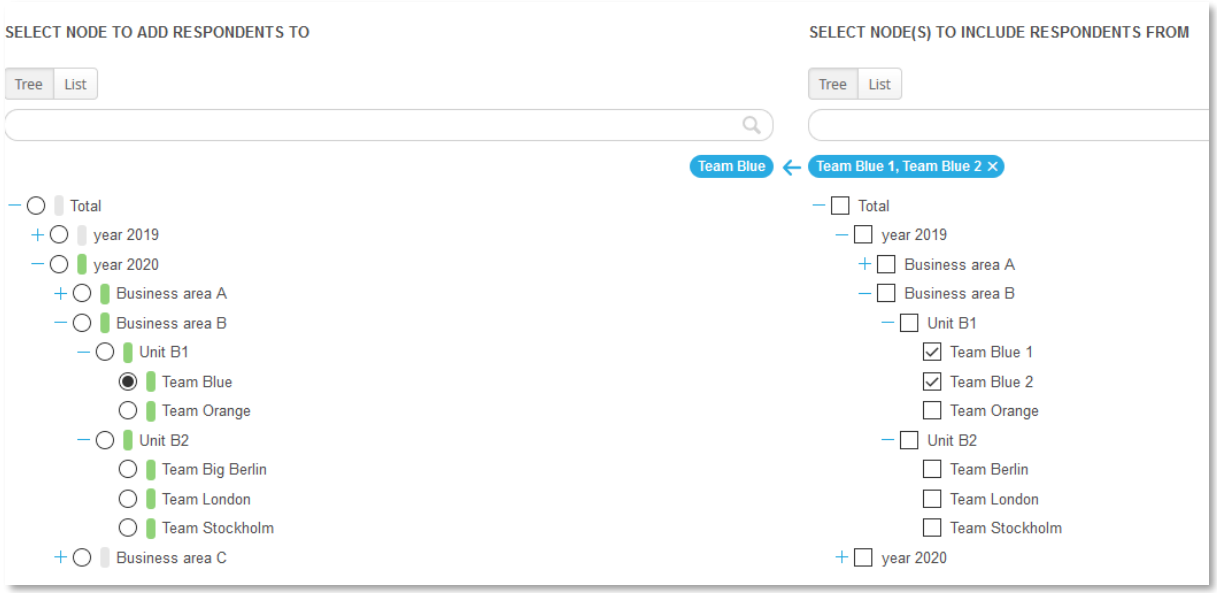

3 In the reports, display the branch of the latest wave only and add wave filter compare to charts and tables

In all the StoryTeller reports, Cross table tool reports etc. select to display the branch of latest wave only as that branch reflects the current company organization, see example in image 1 below. To get the wave over wave comparison in each chart/table you also need to apply an object level compare filter, see example in image 2 below. Image 3 shows result of both these settings.

Image 1, to the left below we see how the branch of the latest wave (year 2020) is specified to be shown in the report only.

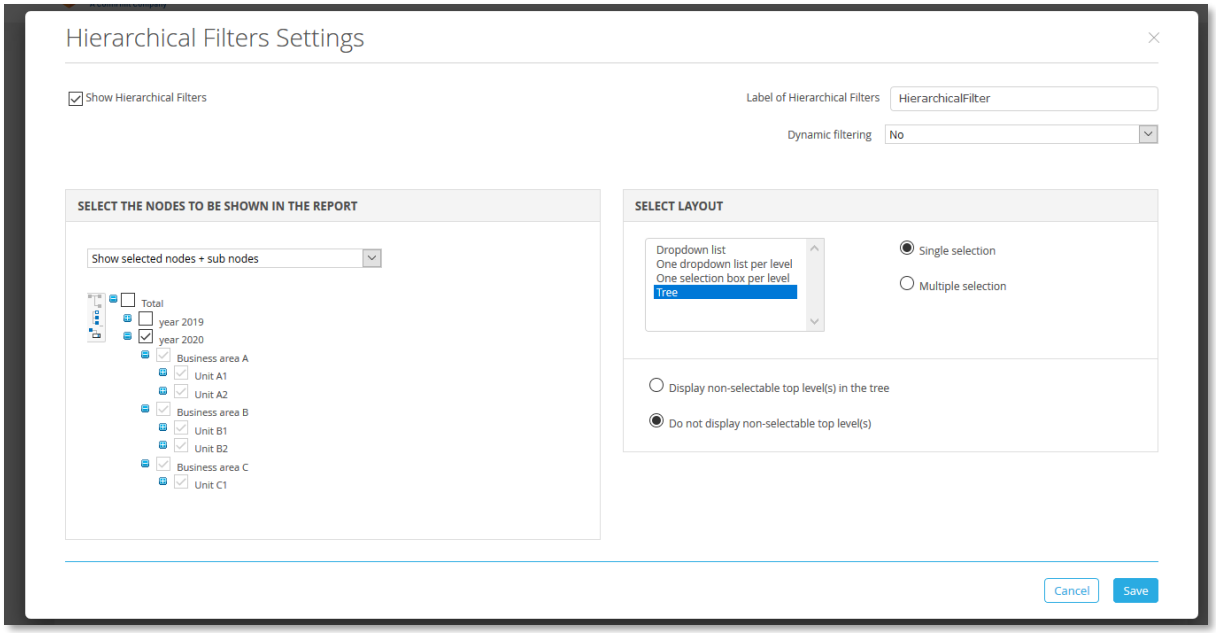

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Image 2, here we see how a regular filter is used to split result in 2019 and 2020 in a table object.

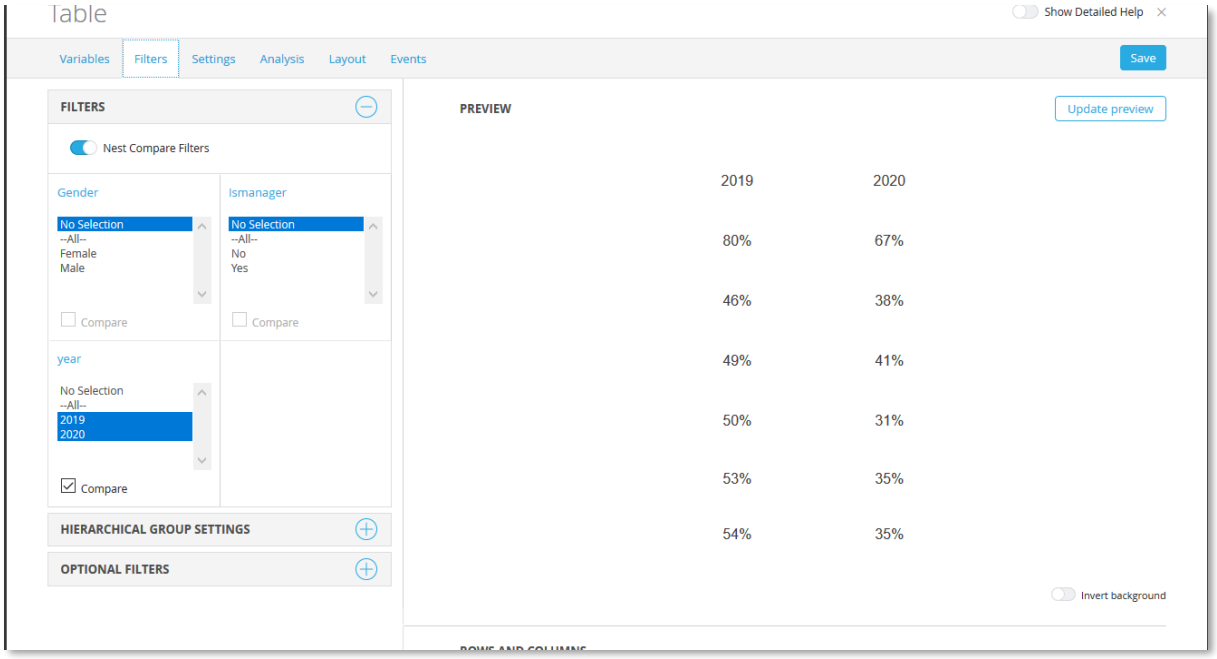

Image 3, here we see the result of settings from image 1 and 2 above. The displayed Hierarchical filter structure reflects the 2020 structure. The Team Blue is selected, based on the mapping definitions in the example previously outlined, the 2019 Top box column shows the aggregated result of Team Blue 1 and Team Blue 2 in 2019

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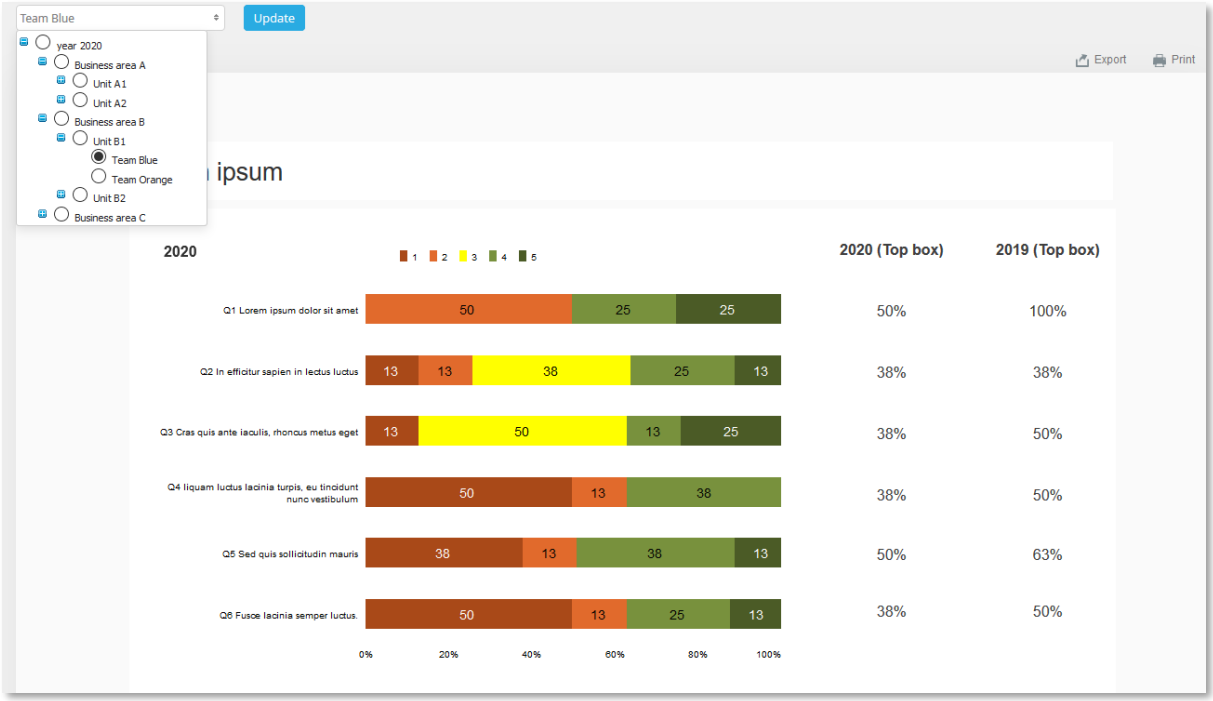
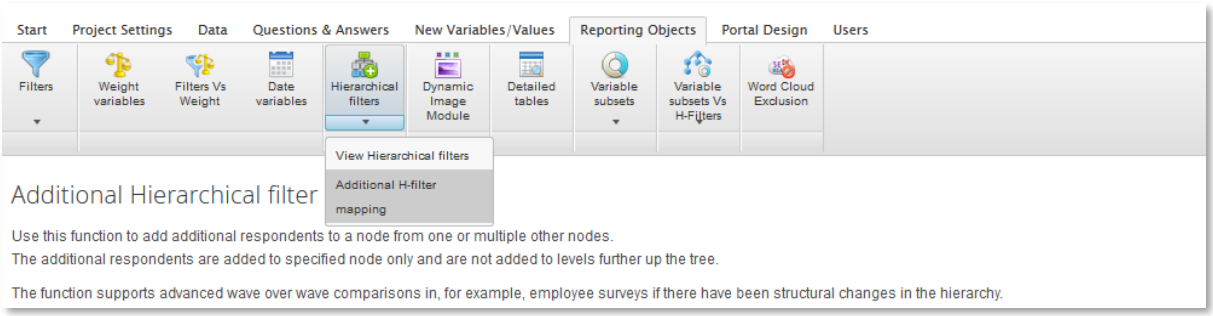


10.2 Setup of mappings

The unit mapping between waves are performed in the new Hierarchical filter mapping page.

Here you see where to find the new page.



The mapping process in this page consists of two steps:

- specify the mappings for each node
- "activate" the mappings, meaning that the Hierarchical filters are updated based on the defined mappings.

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10.2.1 Specify mappings

Mappings can be specified in three different ways:

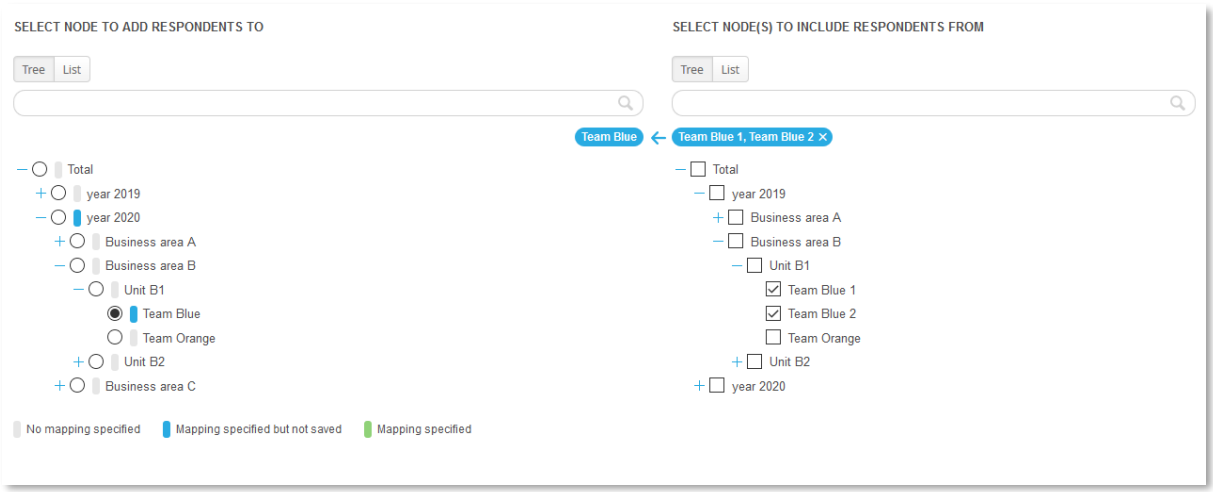
- Manual mapping, you select which nodes in the previous wave that a node in latest wave should be compared to
- Auto-map, nodes are mapped automatically by “path and name match” or just a “name match”
- Excel download/upload process, you enter the mappings in an Excel file which then is uploaded

These three options can be used in combination. Usually you start of with Auto-mapping and then you manually set up the more advanced comparison when nodes have been merged, split up, changed names etc.

10.2.1.1 Manual mapping

To manually create a mapping select the node in the latest wave in the left tree, then tick the nodes it should be compared to in the right tree. In the example image below we see that the node Team Blue 1 and Team Blue 2 in 2019 are mapped to Team Blue in 2020. Technically, the respondents in the Team Blue 1 and Team Blue 2 in 2019 are added to Team Blue in 2020, the additional respondents are added to Team Blue node only and are not added to levels further up the tree.

Here we see an example, the nodes Team Blue 1 and Team Blue 2 in 2019 are mapped to Team Blue in 2020.



Tip 1: the Hierarchical filters can be shown in either a tree view or as a list view, you can switch view by selecting the option above the Hierarchical structure. When using the list view you can also select if the nodes should be sorted by level or by branch.

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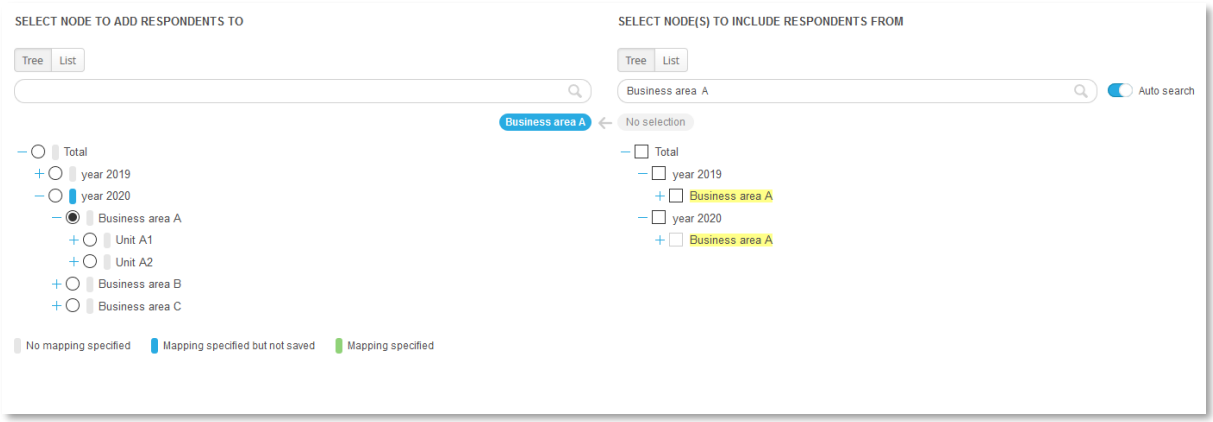
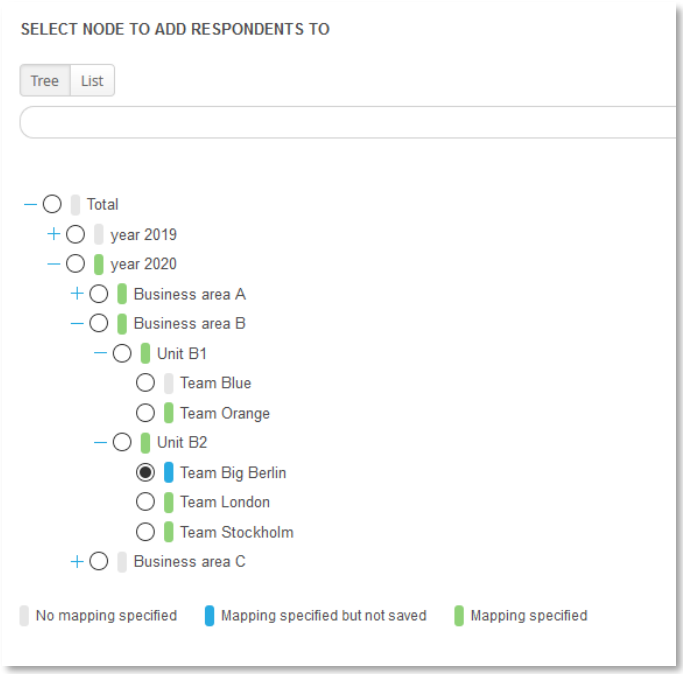
Tip 2: if you apply the “auto search” option in top right corner, the name of the selected node in the left tree is automatically inserted in the search field in the right tree which makes it easy to find the node if these have the same name in both waves.

Here we see example of the auto search options, the name Business area A was inserted automatically in the search field as auto search was turned on.



Tip 3, all nodes in the Hierarchical structure are color coded so you easily can see if mappings have been done or not.

Here we see an example of the color coding. The green nodes have a saved mapping, the grey nodes do not have any mapping and the blue node has just been changed but not yet saved



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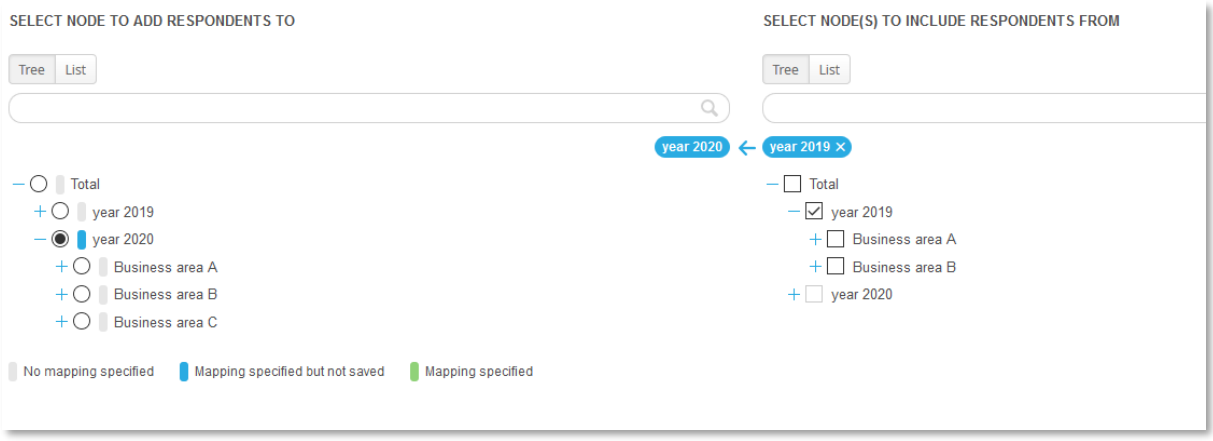
10.2.1.2 Auto-mapping

The Auto-mapping option maps the nodes between waves based on name matches which makes it efficient as the majority of the nodes usually have the same names in all waves. When applying the auto-mapping you select if the name match should be based on the whole path or just the name of each node, you can also select if previously specified mappings should be overwritten or not.

To auto-map do the following:

- Select a “starting” node in the latest wave, in the left tree
- Select a “starting” node in the previous wave, in the right tree
- Open the Auto-mapping window and select mapping options
    - Should name of full path match or only the node name?
    - Should previous mappings be overwritten or not?

Here we see an example, in first image below the top node in 2020 branch is selected in the left tree and the top node in 2019 branch in the right tree, as show in second image all nodes below selected nodes are now auto-mapped based on text match.



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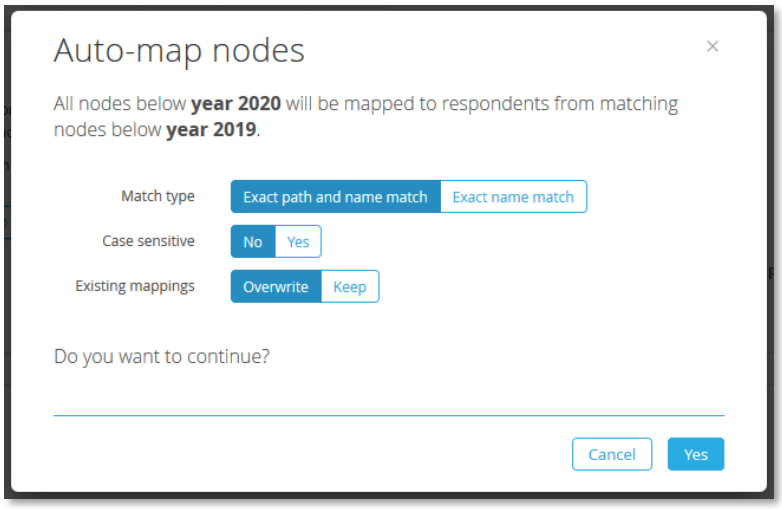


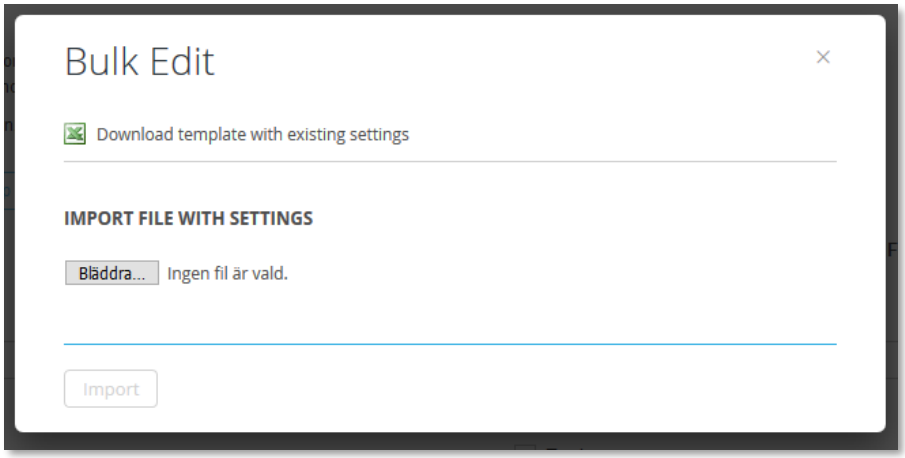
Note, if the matching is not based on the full path two or more nodes in the previous wave could theoretically match a node in the latest wave, if this situation occurs none of these nodes are mapped to the node in latest wave when auto-mapping is applied.

10.2.1.3 Bulk edit via Excel download/upload process

To specify new mappings, or edit existing connections, in an Excel file do as the following:

1. Enter the "Bulk edit" view
2. Download the Excel template
3. Specify mappings in the Excel file
4. Upload the file

Here we see how to enter the Bulk Edit view.



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In the Excel file the mappings are specified in column E as shown below. In that column you enter the code of the node it should be compared to in a previous wave. If a node shall be compared to multiple nodes you enter those codes comma separated.

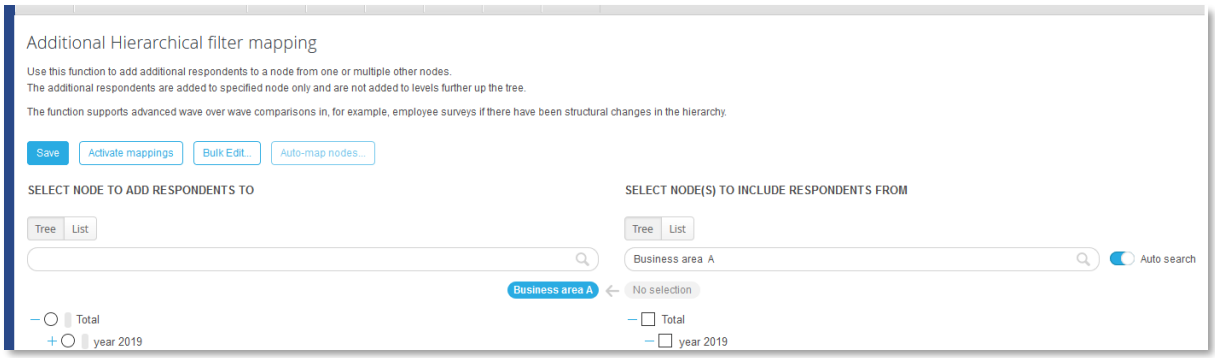
Here we see the Excel file, the mappings are done in column E.

	A	B	C	D	E
1	HFilterID	Path	Name	Code	Include respondents from the following nodes (Code)
5	9	Total-->year 2019-->Business area A-->Unit A1	Unit A1	year1level 11level 21	
6	18	Total-->year 2019-->Business area A-->Unit A1-->Team brown	Team brown	year1level 11level 21level 36	
7	19	Total-->year 2019-->Business area A-->Unit A1-->Team green	Team green	year1level 11level 21level 39	
8	20	Total-->year 2019-->Business area A-->Unit A1-->Team pink	Team pink	year1level 11level 21level 314	
9	21	Total-->year 2019-->Business area A-->Unit A1-->Team red	Team red	year1level 11level 21level 315	
10	10	Total-->year 2019-->Business area A-->Unit A2	Unit A2	year1level 11level 22	
11	22	Total-->year 2019-->Business area A-->Unit A2-->Team cloud	Team cloud	year1level 11level 22level 37	
12	23	Total-->year 2019-->Business area A-->Unit A2-->Team sun	Team sun	year1level 11level 22level 317	
13	5	Total-->year 2019-->Business area B	Business area B	year1level 12	
14	11	Total-->year 2019-->Business area B-->Unit B1	Unit B1	year1level 12level 23	
15	24	Total-->year 2019-->Business area B-->Unit B1-->Team Blue 1	Team Blue 1	year1level 12level 23level 34	
16	25	Total-->year 2019-->Business area B-->Unit B1-->Team Blue 2	Team Blue 2	year1level 12level 23level 35	
17	26	Total-->year 2019-->Business area B-->Unit B1-->Team Orange	Team Orange	year1level 12level 23level 313	
18	12	Total-->year 2019-->Business area B-->Unit B2	Unit B2	year1level 12level 24	
19	27	Total-->year 2019-->Business area B-->Unit B2-->Team Berlin	Team Berlin	year1level 12level 24level 31	
20	28	Total-->year 2019-->Business area B-->Unit B2-->Team London	Team London	year1level 12level 24level 311	
21	29	Total-->year 2019-->Business area B-->Unit B2-->Team Stockholm	Team Stockholm	year1level 12level 24level 316	
22	3	Total-->year 2020	year 2020	year2	year1
23	6	Total-->year 2020-->Business area A	Business area A	year2level 11	year1level 11
24	13	Total-->year 2020-->Business area A-->Unit A1	Unit A1	year2level 11level 21	year1level 11level 21
25	30	Total-->year 2020-->Business area A-->Unit A1-->Team brown	Team brown	year2level 11level 21level 36	year1level 11level 21level 36
26	31	Total-->year 2020-->Business area A-->Unit A1-->Team dark green	Team dark green	year2level 11level 21level 38	
27	32	Total-->year 2020-->Business area A-->Unit A1-->Team light green	Team light green	year2level 11level 21level 310	
28	33	Total-->year 2020-->Business area A-->Unit A1-->Team red	Team red	year2level 11level 21level 315	year1level 11level 21level 315
29	14	Total-->year 2020-->Business area A-->Unit A2	Unit A2	year2level 11level 22	year1level 11level 22
30	34	Total-->year 2020-->Business area A-->Unit A2-->Team cloud	Team cloud	year2level 11level 22level 37	year1level 11level 22level 37
31	35	Total-->year 2020-->Business area A-->Unit A2-->Team sun	Team sun	year2level 11level 22level 317	year1level 11level 22level 317
32	7	Total-->year 2020-->Business area B	Business area B	year2level 12	year1level 12
33	15	Total-->year 2020-->Business area B-->Unit B1	Unit B1	year2level 12level 23	year1level 12level 23
34	36	Total-->year 2020-->Business area B-->Unit B1-->Team Blue	Team Blue	year2level 12level 23level 33	year1level 12level 23level 34, year1level 12level 23level 35
35	37	Total-->year 2020-->Business area B-->Unit B1-->Team Orange	Team Orange	year2level 12level 23level 313	year1level 12level 23level 313
36	16	Total-->year 2020-->Business area B-->Unit B2	Unit B2	year2level 12level 24	year1level 12level 24
37	38	Total-->year 2020-->Business area B-->Unit B2-->Team Big Berlin	Team Big Berlin	year2level 12level 24level 32	year1level 12level 24level 31
38	39	Total-->year 2020-->Business area B-->Unit B2-->Team London	Team London	year2level 12level 24level 311	year1level 12level 24level 311
39	40	Total-->year 2020-->Business area B-->Unit B2-->Team Stockholm	Team Stockholm	year2level 12level 24level 316	year1level 12level 24level 316
40	8	Total-->year 2020-->Business area C	Business area C	year2level 13	
41	17	Total-->year 2020-->Business area C-->Unit C1	Unit C1	year2level 13level 25	
42	41	Total-->year 2020-->Business area C-->Unit C1-->Team New York	Team New York	year2level 13level 25level 312	

10.2.2 Activate mappings

After mappings are setup, or changed, you need to activate those by clicking the Activate mappings button shown in the image below.

Here we see the Activate mapping button to the right of the Save button.



Note : if new data is imported the mapping activation is applied automatically during the regular Data Activation, so you only need to use the Activate mappings option after changes in mappings

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and not after each data load. If mappings are deleted you also need to run the Activate mapping option to remove these mappings.

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11 Report user administration

11.1 From and To date used to set Report user level project access

You can now, on a user level, specify a From and To date to limit project access to a pre-defined date window. If the current date is outside the specified From and To date the user will not have access to the project. The user is still kept in the project but treated as inactive. The From and To dates are optional and do not need to be defined if not required.

The From and To dates are set per user in the Create/Edit user pages or bulk updated with the Excel upload function. The date settings are also available in the Report User management report, both in the online view and in the Excel upload function.

Note, the date check is done on server side meaning that the local server date time is used for evaluating if the user should have access to the project or not.

11.1.1 Setup of date limits

The From and To dates are optional and must be enabled to be applied. To specify a From and To date limit you first have to enable the “Set dates for project access”, after that you can specify the desired dates as show in the image below. You can leave one of the dates field blank if no “From” or no “To” date limit should be applied.

Here we see how to limit the project access by specifying a From and To date for project access.

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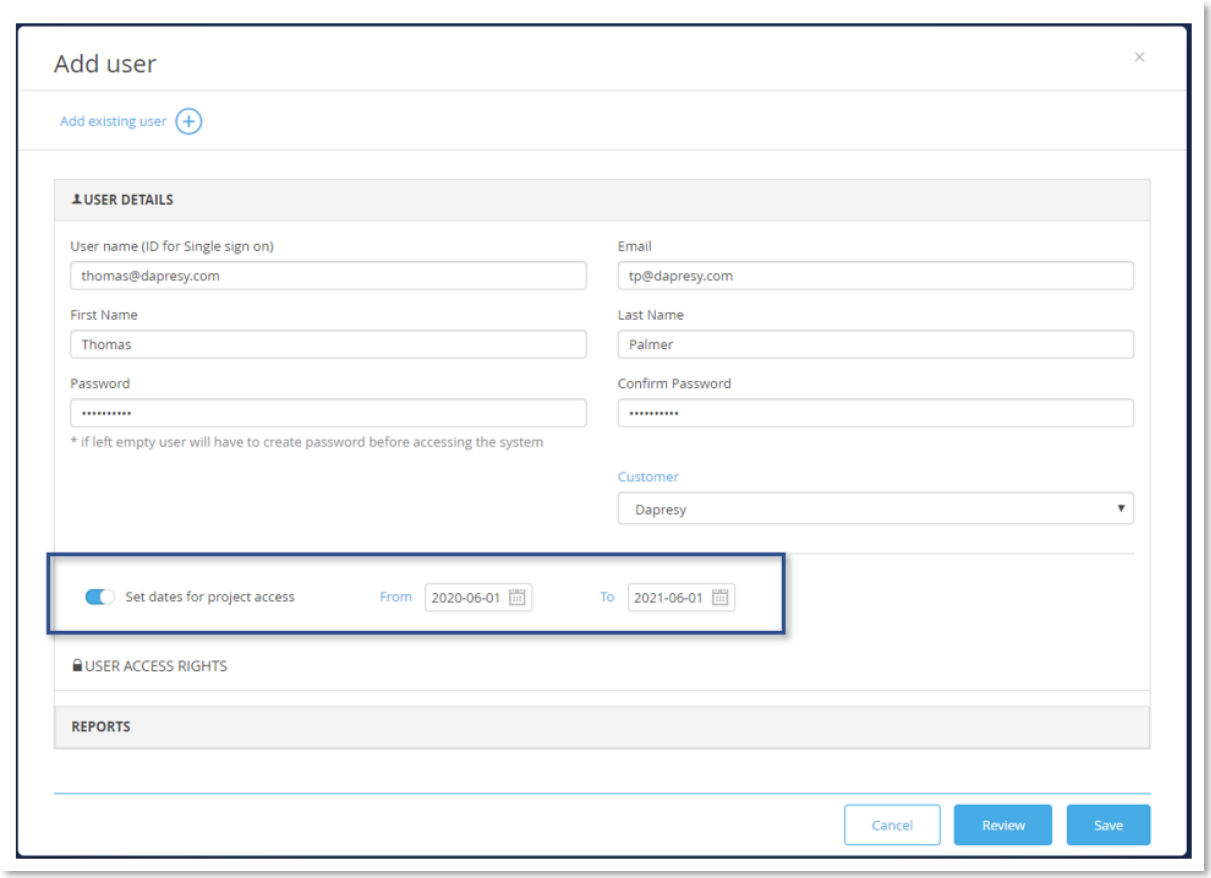

Here we see the Excel file for uploading Report users. The new From and to Date settings are present in column G and H. In this example user 1, 3 and 4 have no date limitations, user 2 will have access to the project from 2020-06-01 to 2021-06-01 and user 5 has access from 2020-06-01. All dates are inclusive.

E	F	G	H	I
		Dates for Project Access		
ıssword	Default language	Starting From	Last Date for Access	2 - Welcome
	1 - English			Access
	1 - English	2020-06-01	2021-06-01	Access
	1 - English			Access
	1 - English			Access
	1 - English	2020-06-01		Access

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