Forsta Visualizations December Release

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1 Introduction

This document describes new and improved features in the Forsta Visualizations 2021 December Release.
If you would like to know more about these features, please contact the support team at support@dapresy.freshdesk.com and they will be able to assist you.

Best Regards,
Forsta Team

2 Overview

The Forsta Visualizations 2021 December update contains some large improvements, see summary below.

Calculation updates

- You can now exclude answers such as a "Don't know" or a "Refuse to answer" from percentage calculations. It is an Answer block level setting, like the existing Exclude from Mean value setting, which means that the definition is made once and then applied to all questions which share the same Answer block. This exclusion logic is applied to all percentage calculations in StoryTeller, StoryCreator and the Crosstable tool. Previously, you had to clean or recode the data to exclude certain answers from the calculations which is no longer needed when the new setting is applied.

StoryTeller

- With new logic in Optional filters the time interval selection (weeks, months, quarters or years) can now be set to follow the selected time-period filter. E.G., if the Report user selects a time-period based on weeks, a weekly interval is applied, if a time-period based on months is selected a monthly interval is applied and so on. This new auto interval selection logic results in a better user experience in reports where the interval is dependent on the time selection.

  Here is an example report, the user has selected to filter the report by Week 07 in 2020, so, the chart uses a weekly interval and the comparison value in the gauge is difference to previous week. If a specific month is selected as time period filter the line chart changes to a monthly interval and the comparison value in the gauge is based on difference to previous month.
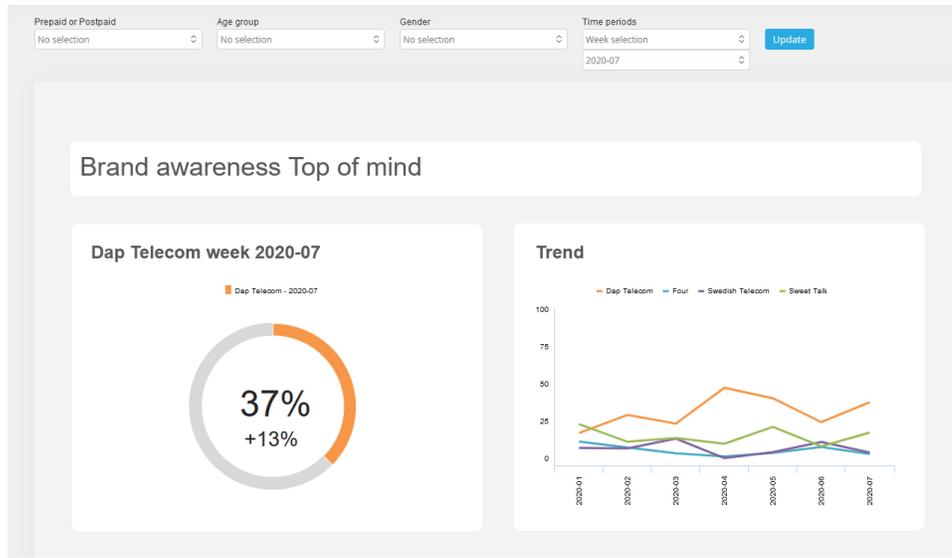
- In optional filter setup you can now specify minimum and maximum number of options the report user is allowed to select in the variable subset filter, the hierarchy filter or in a regular filter. The new minimum and maximum settings support more customized dashboards built for certain use cases. As an example, the layout of a dashboard can now be customized to compare exactly two brands, as the user will not be able to select fewer or more brands.

Here is an example report built for comparing two brands. Both the min- and max-limit in the Brand filter is to 2, so the user must always have two brands selected.
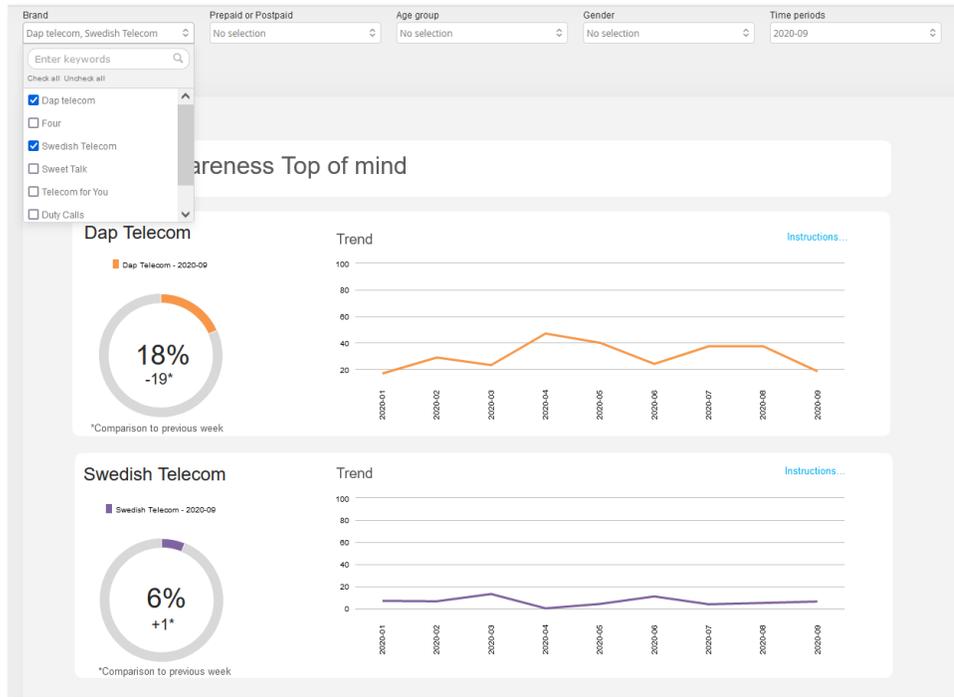
- Value-based series coloring can now be applied to, for example, gauges or bar- and column-charts. For instance, when the value range is between 0-50 the series is colored red, if 50-70 the series is colored yellow and so on. By using value-based coloring it is easier to spot items which for example is above or below a certain target or benchmark value.

  Example where value-based coloring has been applied to a column chart. The series with result 0-28 is colored red, 28-31 are colored yellow and 31-100 are colored green

- Charts and tables displaying differences to uploaded reference values can now be sorted ascending/descending based on the difference to the reference data.

Example, all the attributes below are sorted by the value in the first column , which is the difference to the target value (the reference value) which is shown in the last column in the table.

StoryCreator

- The new value-based chart series coloring logic implemented in StoryTeller is also available in StoryCreator, see example below where series are colored in red, yellow or green based on the value.
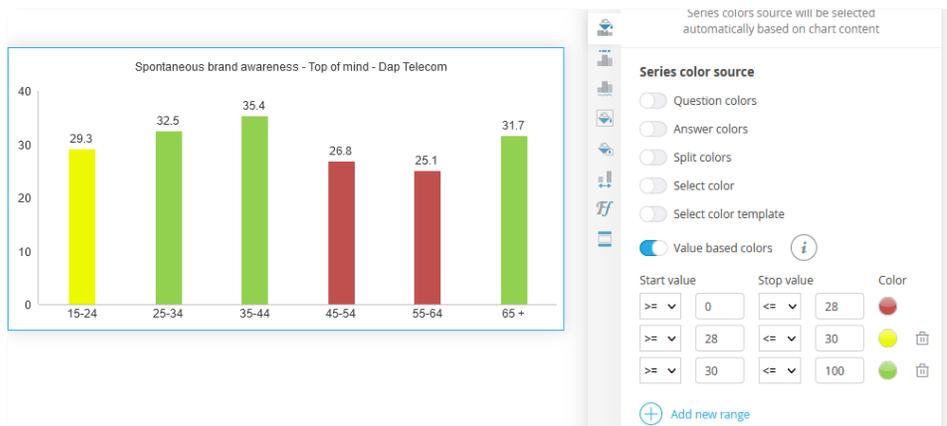
- New smart legend label logic moves repeated text from the legend items into a legend header, which makes the legend easier to read without manual and time-consuming changes like hiding the repeated text and add same text into a separate text box above the chart.

  Below is an example of the new function to the right and the old to the left.
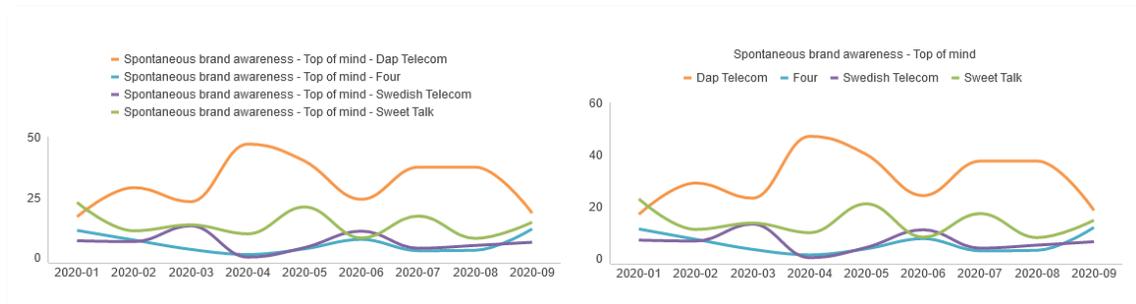
My stories

- The editable PowerPoint export function recently released in StoryTeller is now also available in My Stories. When exporting a report in editable format the charts and tables are exported as native PowerPoint objects allowing advanced editing in the PowerPoint document. Chart layout can be amended (e.g., change chart type altogether), data series can be edited, removed and added, which has a wide range of potential uses. Previously, all charts and tables in My Stories were exported as images without editing possibilities in PowerPoint.

Project administration

- In the Download/Upload meta data function, used to edit labels such as question texts, text boxes in Storyteller reports, filter names etc. in Excel file there is now a new option to download unique labels only which makes editing more efficient in use cases where the same label is used in multiple places. The new logic can be especially beneficial when downloading the StoryTeller text boxes or StoryTeller objects to Excel as in many cases the same label is used in multiple objects, like for example an instruction text in Text boxes or a Low base size warning text in charts and tables.

  Here we see a typical report where same labels are shown in multiple places. By using the new option to export unique labels you need to edit one label only in the Excel file.
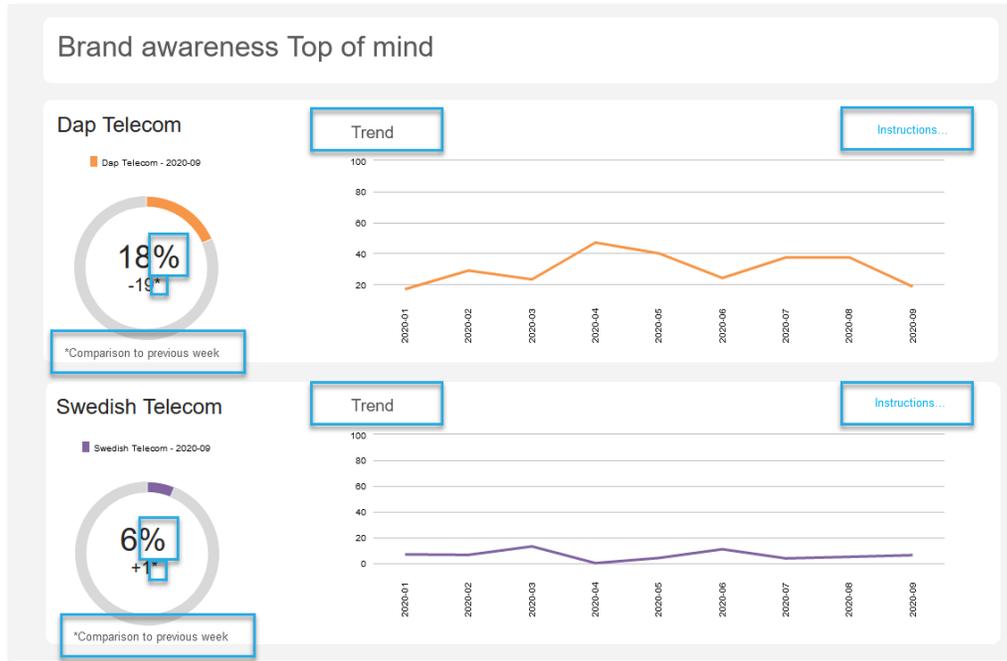
Alchemer/SurveyGizmo data connector updates

- Users can now choose which language is imported.
- The Original variable names can now be imported as well, this means that the imported metadata will better match the SPSS files generated from Alchemer.

3 Calculation updates

3.1 Exclude answers from percentage calculation

You can now exclude answers such as a "Don't know" or a "Refuse to answer" from the percentage calculations. It is an Answer block level setting, like the existing Exclude from Mean value setting, which means that the definition is done once and then applied to all questions which share the same Answer block. The exclusion logic is applied to all percentage calculations in StoryTeller, StoryCreator and the Crosstable tool. Previously you were forced to clean or recode the data to exclude certain answers from the calculations, which is no longer required when the new setting is applied.

3.1.1 Setup

To exclude an answer from percentage calculations, go to the Answer block view, located in the questions page, and specify the answers to be excluded in the new column "Exclude from %", example below.

Here is the new column in the Answer block page used to exclude an answer from the percentage calculation, "Don't know" is excluded in this example.

StoryCreator, when viewing the answer list of a question with an excluded answer ("Don't know"). The answer is still shown but not selectable, the same logic is applied to both StoryTeller and the Crosstable tool.
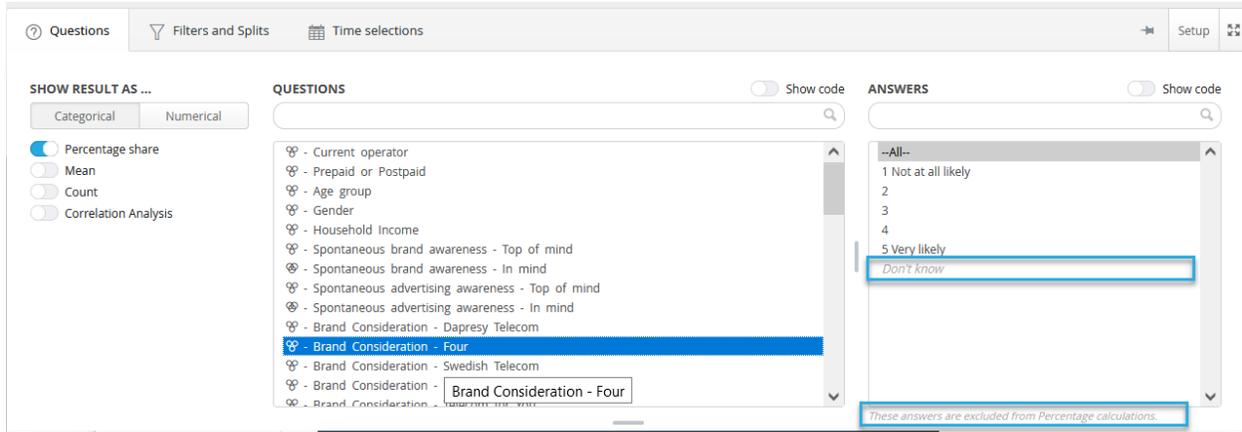
3.1.2 Calculation examples

When excluding an answer from the percentage calculation the respondents answering only the excluded answer are excluded from the base size. See example of both a single choice and multi choice question calculations below.

Example 1: Q1 is a single choice question and "Don't know" is excluded from the percentage calculation. The result of answer "5" becomes 3/7*100=43%. Respondents 5, 9 and 10 are not included in base.

Respondent	Q1
1	1
2	4
3	5
4	3
5	Don't know
6	5
7	4
8	5
9	Don't know
10	Don't know

Example 2: Q2 is multi choice question and "Other" is excluded from the percentage calculation. The result of answer "Volvo" becomes 3/8*100=38% Respondents 5 and 7 are excluded from base size, respondents 3 and 6 are included since they also have data for other answers and not only "Other".

Respondent	Q2
1	Volvo
2	Volvo
3	Volvo, Other
4	BMW
5	Other
6	Audi, Other
7	Other
8	Toyota
9	Audi, Toyota
10	Nissan

4 Storyteller

4.1 Auto selection of interval in Optional filters

With new logic in Optional filters the time interval selection (weeks, months, quarters or years) can now be set to follow the selected time-period filter. E.G., if the Report user selects a time-period based on weeks a weekly interval is applied, if a time-period based on months is selected a monthly interval is applied and so on. This new auto interval selection logic results in a better Report user experience in reports where the interval is dependent on the time selection.

Here is an example report, the user selected to filter the report by Week 07 in 2020, so, the chart shows weekly interval and the comparison value in the gauge is difference to previous week. If a specific month is selected in the time filter, a monthly interval is applied to line chart and the comparison value in the gauge is based on difference to previous month.
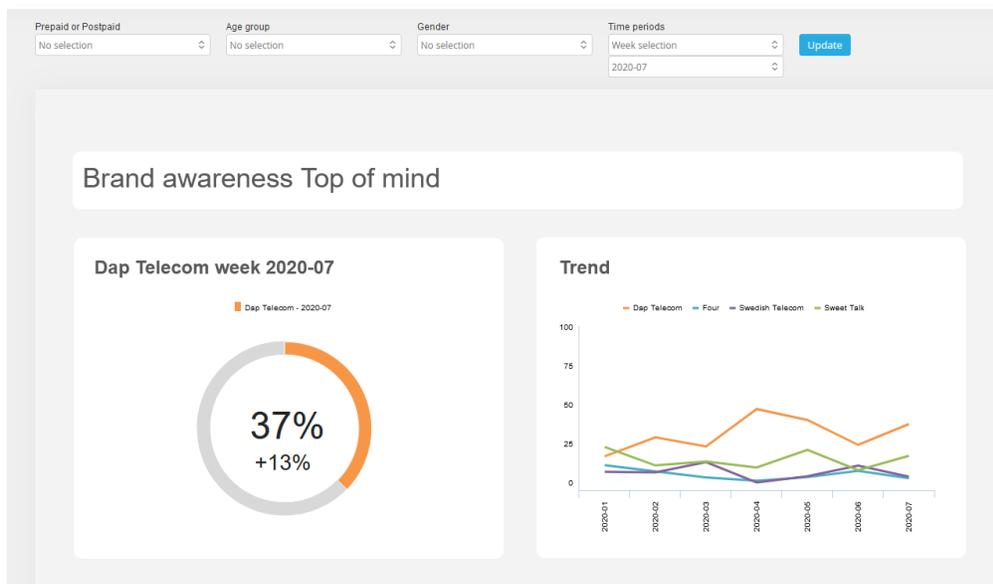
4.1.1 Setup

The new auto-selection option is enabled in the Interval tab in the Optional Filters setup page, as shown below. The new option appears only when Time period filtering has been enabled in the Time period tab.

Tick this option to auto-select interval based on the user selected time period. The option is only available when Time period filters are enabled.

Which interval that will be applied based on user selected Time period filter:

- Time period = Full period → Interval = Full period
- Time period = Day selection → Interval = Days
- Time period = Week selection → Interval = Weeks
- Time period = Month selection → Interval = Months
- Time period = Quarter selection → Interval = Quarters
- Time period = Year selection → Interval = Years
- Time period = Last X Days → Interval = Days
- Time period = Last X Weeks → Interval = Weeks
- Time period = Last X Months → Interval = Months
- Time period = Last X Quarters → Interval = Quarters
- Time period = Last X Years → Interval = Years
- Time period = Year to date → Interval = Years

- Time period= start and stop date defined in calendar control → Interval = Full period

4.2 Optional filters, minimum and maximum selection limits

In Optional filter setup you can now specify minimum and maximum number of options the Report user is allowed to select in the variable subset filter, the hierarchy filter or in a regular filter. The new minimum and maximum settings support more customized dashboards built for certain use cases. As an example, the layout of a dashboard can now be customized to compare exactly two brands as the user will not be able to select fewer or more brands.

An example report built for comparing two brands. Both the min- and max-limit in the Brand filter is set to 2 so user must always have two brands selected.
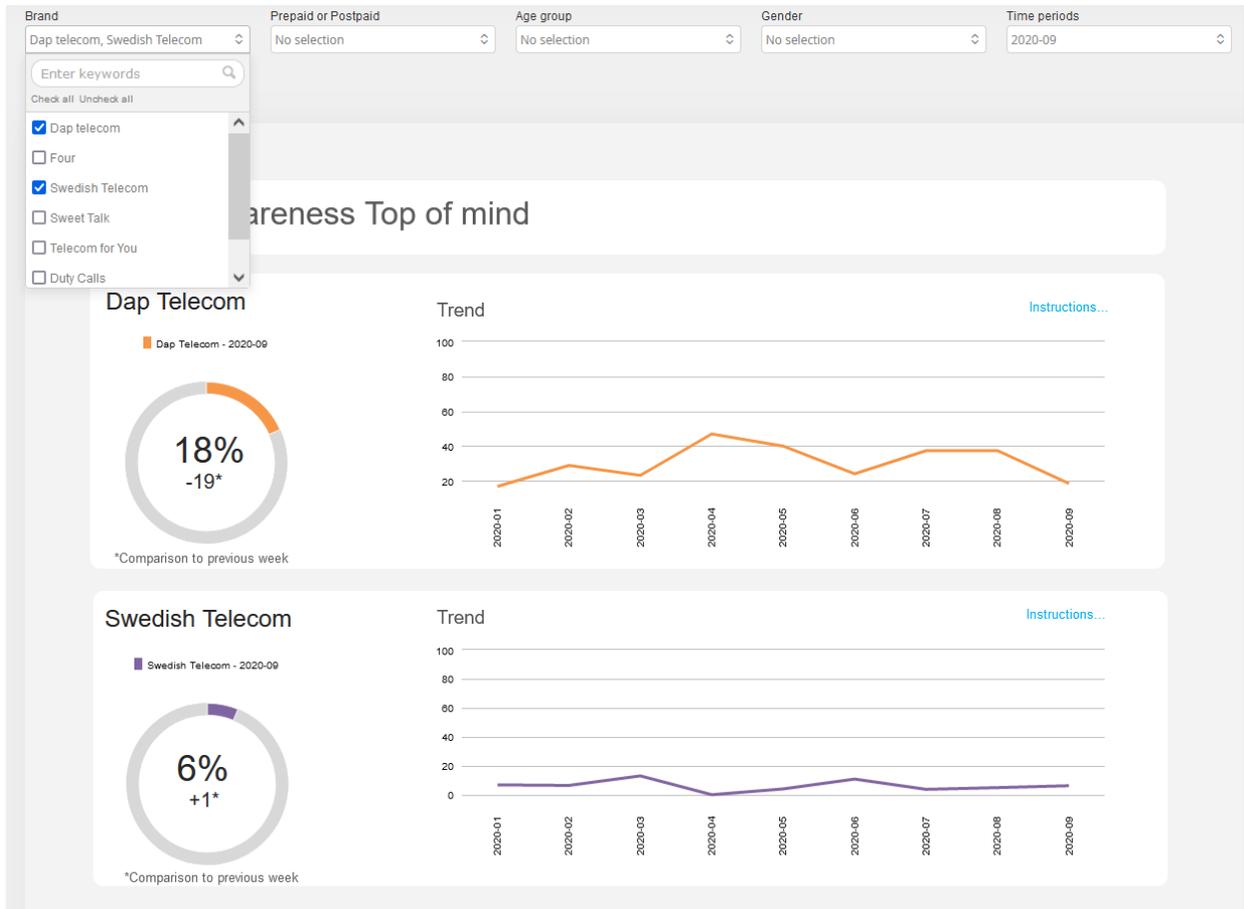
4.2.1 Setup

The setup of the minimum and maximum number of selected options is specified in Optional Filter setup/Hierarchical filter setup as shown in the images below.

For Variable subsets, the min and max limit can be applied when multi-select is enabled.
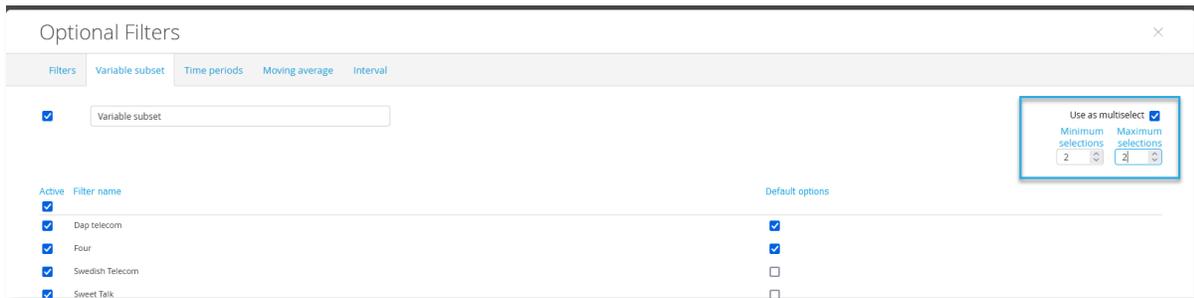
In Filters, the min and max limits can be applied to multi-select filters which don't have "No selection" or "Dynamic filtering" enabled.
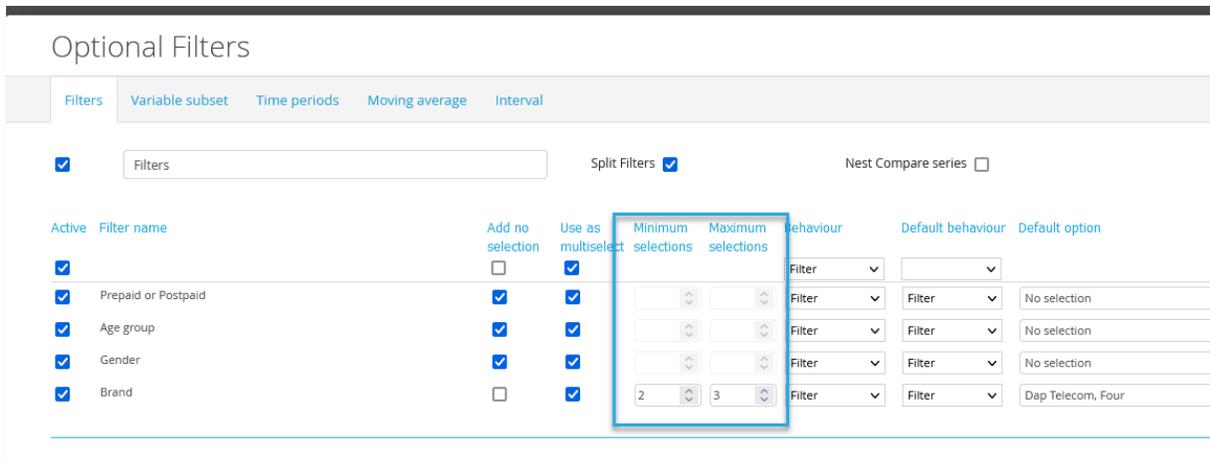
For Hierarchical Filters, the min and max limits can be applied when multi-select is enabled and any of the layout type "Dropdown list" or "Tree" is used.

Hierarchical Filters Settings ✕

☑ Show Hierarchical Filters

Label of Hierarchical Filters [HierarchicalFilter]

Dynamic filtering [No ⌄]

SELECT THE NODES TO BE SHOWN IN THE REPORT
[Show all nodes ⌄]

SELECT LAYOUT

Dropdown list
One dropdown list per level
One selection box per level
Tree

○ Single selection

◉ Multiple selection

Minimum   Maximum
selections selections
[⇕]   [⇕]

4.3 Value based coloring in charts

Value-based series coloring can now be applied to for example gauges or bar- and column-charts. For example, when the value range is between 0-50 the series is colored red, if 50-70 the series is colored yellow and so on. By using value-based coloring it is easier to spot items which for example is above or below a certain target or benchmark value.

Example where value-based coloring has been applied to a column chart. The series with result 0-28 is colored red, 28-31 are colored yellow and 31-100 are colored green
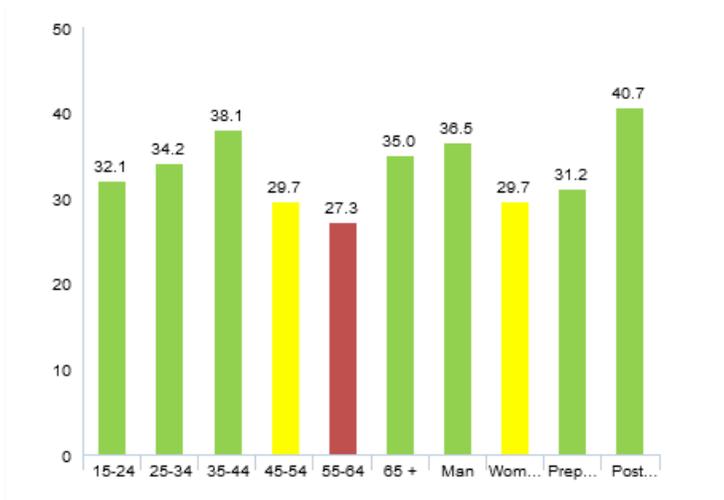
4.3.1 Setup

Value based series coloring is supported in the following chart types:

- Bar
- Column
- Pie
- Donut
- Gauge
- Solid Gauge

To apply value-based coloring select "Value based" in the "Series color source" dropdown list as shown below and define the desired ranges.

Note, if the chart is exported to PowerPoint as editable objects the chart legend may not match the online appearance due to limitations in PowerPoint's chart functionality. If charts are exported to PowerPoint as images the legend will match the online appearance. To avoid this issue export charts as images or setup the chart without a legend. Below example shows the online appearance to the left and the same chart exported as an editable PowerPoint object to the right.
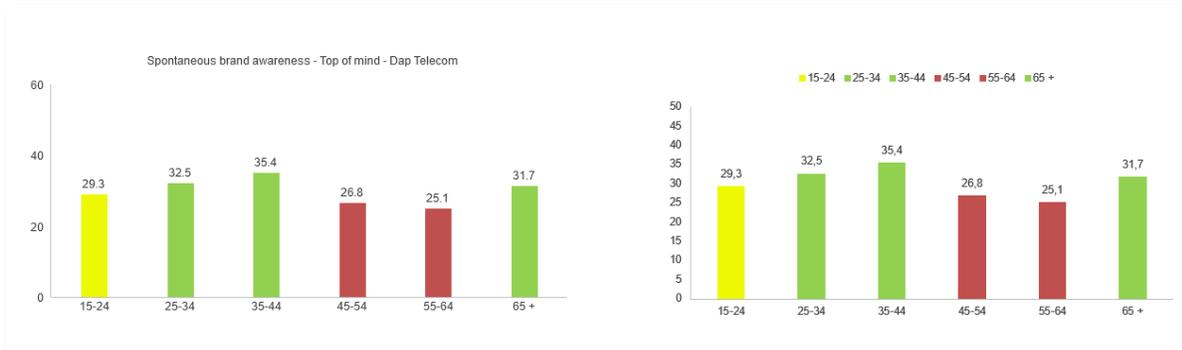
4.4 Reference data, improved sorting

Charts and tables displaying differences to uploaded reference values can now be sorted ascending/descending based on the difference to the reference data, previously the sorting was always based on the survey result and not the difference to the reference value.

Example, all the attributes below are sorted by the difference to the target value (the reference value).

Attribute scores		Target comparison	
Mean value, 1-5		Diff. to target	Target
Satisfaction attribute 3	3.13	+0.13	3.00
Satisfaction attribute 2	3.12	+0.12	3.00
Satisfaction attribute 5	3.08	+0.08	3.00
Satisfaction attribute 1	3.08	+0.08	3.00
Satisfaction attribute 4	3.03	+0.03	3.00
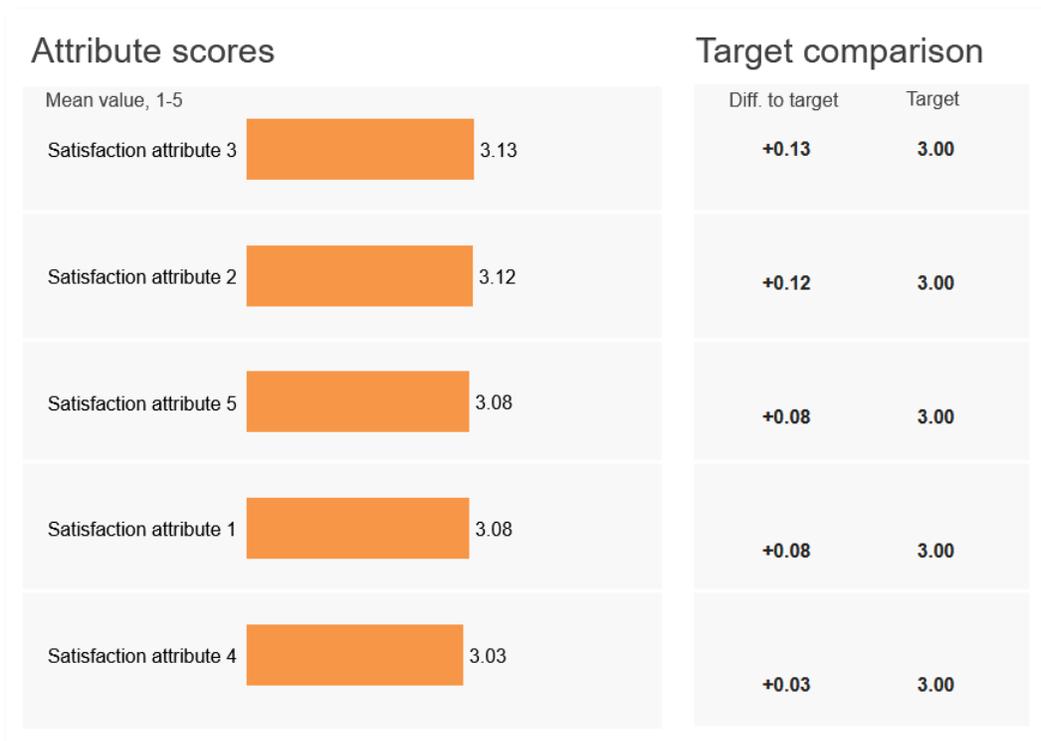
4.4.1 Setup

Sorting by the difference to the reference data can be applied to charts and tables displaying "Difference to Reference data". In the image below you see the new sorting controls appearing when "Difference to Reference data" is enabled, as shown you select if the rows or columns should be sorted and the sorting direction.

Table

Variables	Filters	Settings	Analysis	Layout	

BENCHMARK ⊕

RANK ⊕

STATISTICAL ANALYSIS ⊕

MEAN VALUE SERIES ⊕

AGGREGATED SERIES ⊕

REFERENCE DATA ⊖

🔵 Enable reference data comparison

🔵 Difference to reference data

🔵 Sort on Difference to reference data

Rows ⌄

Descending ⌄

◯ Original value + difference to reference data

◯ Reference data only

◯ Percentile ranking

Compare to percentile 50

5 StoryCreator

5.1 Value based coloring

Value based series coloring can now be applied to, for example, bar- and column-charts. For instance, when the value range is between 0-50 the series is colored red, if 50-70 the series is colored yellow and so on. By using value based coloring it is easier to spot items which for example is above or below a certain target or benchmark value.

Example where value-based coloring has been applied to a column chart. Series with result 0-28 is colored red, 28-31 is colored yellow and 31-100 is colored green
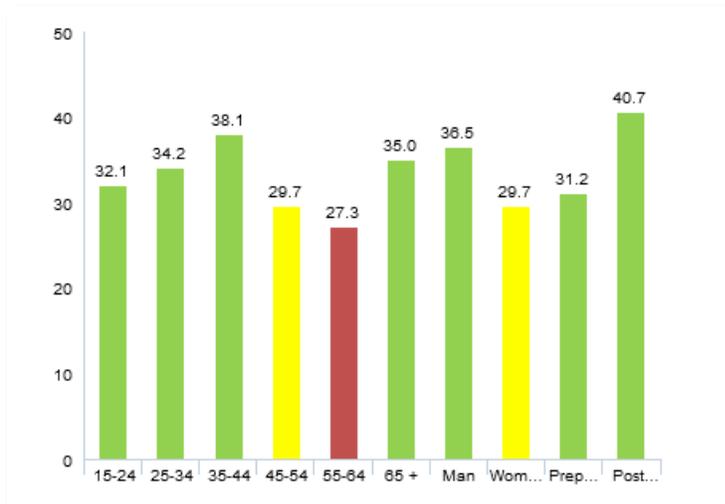
5.1.1 Setup

Value based series coloring is supported in the following chart types:

- Bar
- Column
- Pie
- Donut

To apply value based coloring to a chart select "Value based" in the "Series color source" dropdown list as shown below and define the desired ranges.

Note, if the chart is exported to PowerPoint as editable objects the chart legend may not match the online appearance due to limitations in PowerPoint's chart functionality. If charts are exported to PowerPoint as images the legend will match the online appearance. To avoid this issue export charts as images or setup the chart without a legend. Below example shows the online appearance to the left and the same chart exported as an editable PowerPoint object to the right.
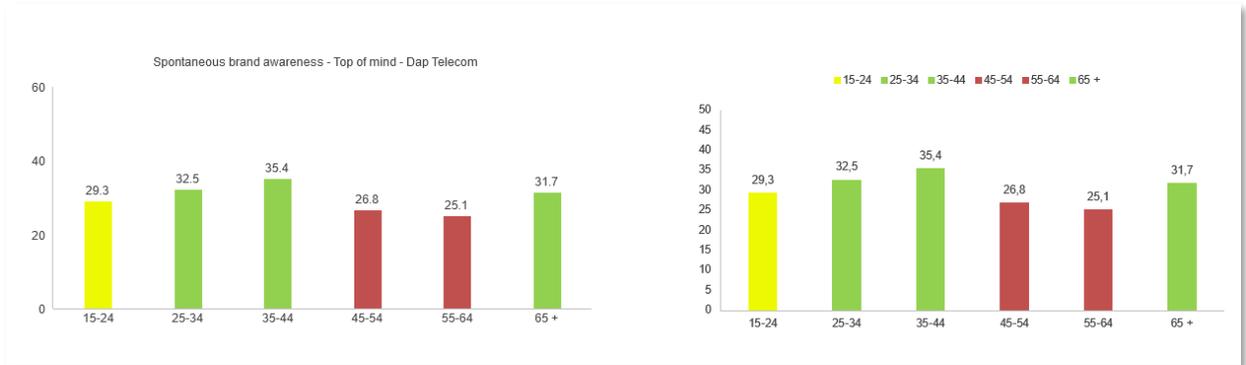
5.2 Smart legend option to avoid repeated labels

New smart legend label logic moves repeated text items from the legend into a legend header which makes the legend easier to read without manual and time-consuming changes like hiding the repeated text and add same text into a separate text box above the chart. Below we see the new logic to the right and the old to the left.

Example 1, the new legend labeling logic is shown to the right and the old to the left, as shown the repeated question text is moved into a legend header.
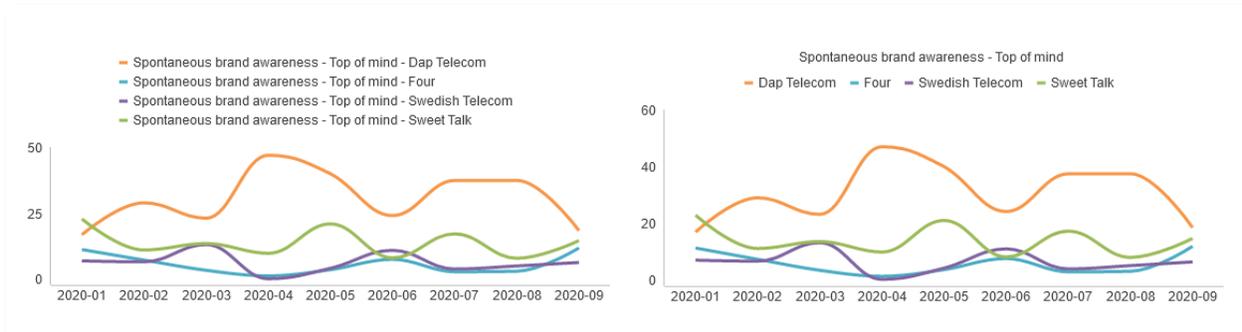
Example 2, the new legend labeling logic is shown to the right in the old to the left, as shown the repeated answer label, Swedish telecom, is moved into a legend header.
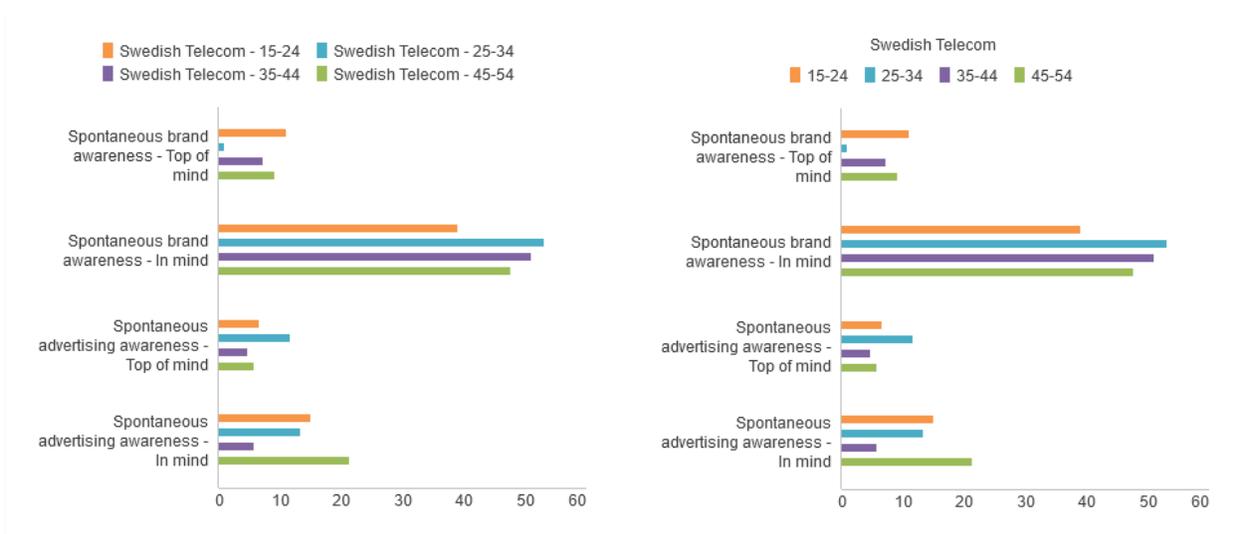
5.2.1 Setup

The new legend logic is, in this first version, disabled by default but will later be default in newly created charts. To enable the new function go to Axis and Legend entries panel and tick the option "Position repeated legend labels in legend headers"
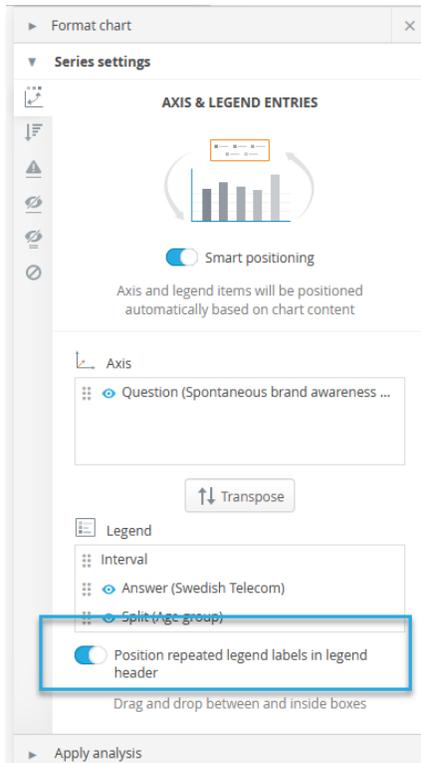
Note, the repeated text is always positioned above the chart, it is not affected by the legend position setting. In the example below the legend position is "right" but the header still shown above the chart.
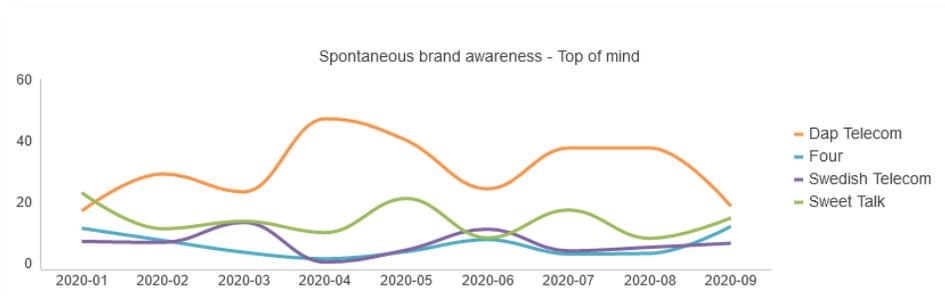
6 My stories

6.1 Editable PowerPoint exports

The editable PowerPoint export function recently released in StoryTeller is now also available in My Stories. When exporting a report in editable format, the charts and tables are exported as native PowerPoint objects allowing advanced editing in the PowerPoint document. Chart layout can be amended (e.g., change chart type altogether), data series can be edited, removed and added, which has a wide range of potential uses. Previously, all charts and tables were exported as images without editing possibilities in PowerPoint.

6.1.1 Enable editable PowerPoint export option

The editable PowerPoint export option is turned off by default, you as an Administrator user can enable the editable export option in the My Stories "Setup" panel.

This is the new editable objects export option in the My Stories Setup panel.
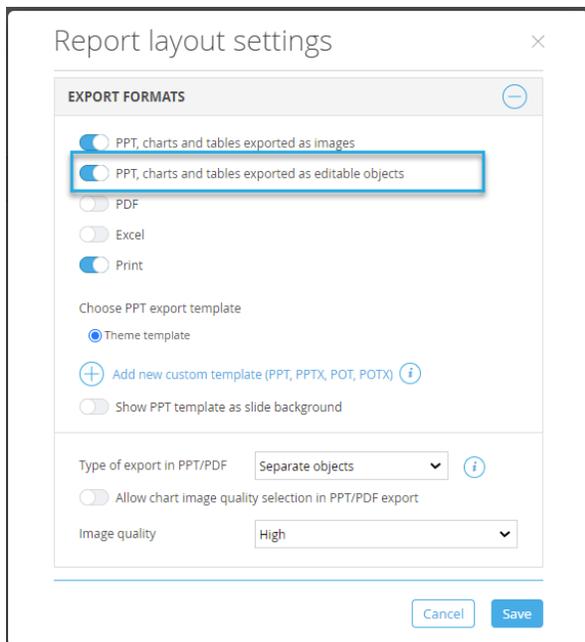
7 Project administration

7.1 Improvements in Download/Upload meta data function

In the Download/Upload meta data function, used to edit labels in Excel, there is now a new option to download unique labels only which makes label editing more efficient in use cases where the same label is used in multiple places. The new logic can, with advantage, be used when downloading the StoryTeller text boxes or StoryTeller object to Excel as in many cases same label is used in multiple objects like for example an instruction text in a Text box or a Low base size warning text in charts and tables.

Here we see a typical report where same labels are shown in multiple places. By using the new option to export unique labels you need to edit one label only in the Excel file.
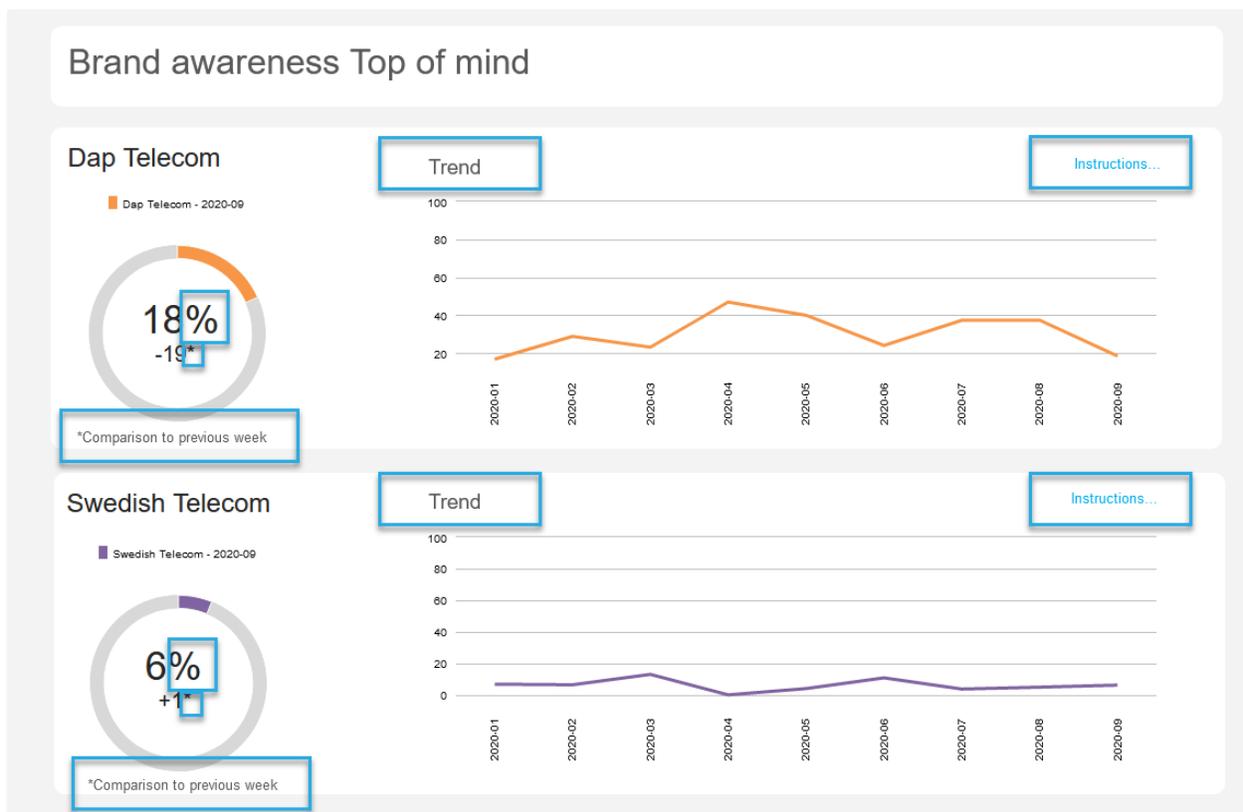
To the left we see the new export format when Storyteller objects and Text boxes items are exported, all the unique labels are shown in a single sheet for easier editing. The full export option is shown to the right, a sheet per type is exported and each label shown in a separate row.

	A	B	D
1	**English**	**Used In**	
2	**Report Text**		
3	Brand awareness Top of mind	Text boxes	
4	Trend	Text boxes	
5	Instructions…	Text boxes	
6	*Comparison to previous week	Text boxes	
7	Brand awareness In mind	Text boxes	
8	%	Storyteller objects	
9	*	Storyteller objects	
10			

|	A	B	C	D	E	F
1	**Path**	**Report**	**Report type**	**Text box ID**	**Text type**	**English**
2						**Report Text**
3	Welcome / Welcome	Welcome	StoryTeller	13	Text	Brand awareness Top of mind
4	Welcome / Welcome	Welcome	StoryTeller	27	Text	Trend
5	Welcome / Welcome	Welcome	StoryTeller	28	Text	Trend
6	Welcome / Welcome	Welcome	StoryTeller	29	Text	Instructions…
7	Welcome / Welcome	Welcome	StoryTeller	30	Text	Instructions…
8	Welcome / Welcome	Welcome	StoryTeller	32	Text	*Comparison to previous week
9	Welcome / Welcome	Welcome	StoryTeller	96	Text	*Comparison to previous week
10	Welcome / Welcome	Welcome	StoryTeller	101	Text	Brand awareness In mind
11	Welcome / Welcome	Welcome	StoryTeller	112	Text	Trend
12	Welcome / Welcome	Welcome	StoryTeller	113	Text	Trend
13	Welcome / Welcome	Welcome	StoryTeller	114	Text	Instructions…
14	Welcome / Welcome	Welcome	StoryTeller	115	Text	Instructions…
15	Welcome / Welcome	Welcome	StoryTeller	116	Text	*Comparison to previous week
16	Welcome / Welcome	Welcome	StoryTeller	117	Text	*Comparison to previous week
17						
18						

Text boxes | Storyteller objects | ⊕

	A	B	C	D	E	F	G
1	**Path**	**Report**	**ObjectID**	**Object type**	**Series**	**Label**	**English**
2							**Report Text**
3	Welcome / Welcome	Welcome	15	Table	Main series	Unit	%
4	Welcome / Welcome	Welcome	16	Table	Main series	Unit	*
5	Welcome / Welcome	Welcome	20	Table	Main series	Unit	%
6	Welcome / Welcome	Welcome	21	Table	Main series	Unit	*
7	Welcome / Welcome	Welcome	24	Table	Main series	Unit	%
8	Welcome / Welcome	Welcome	25	Table	Main series	Unit	%
9	Welcome / Welcome	Welcome	102	Table	Main series	Unit	%
10	Welcome / Welcome	Welcome	103	Table	Main series	Unit	*
11	Welcome / Welcome	Welcome	105	Table	Main series	Unit	%
12	Welcome / Welcome	Welcome	106	Table	Main series	Unit	*
13	Welcome / Welcome	Welcome	109	Table	Main series	Unit	%
14	Welcome / Welcome	Welcome	110	Table	Main series	Unit	%
15							
16							
17							
18							

Text boxes | **Storyteller objects** | ⊕

7.1.1 Download file with unique labels

The new option used to download unique labels is highlighted in the image below. In case there are multiple languages in your project you need to select which language to be used for checking unique labels.
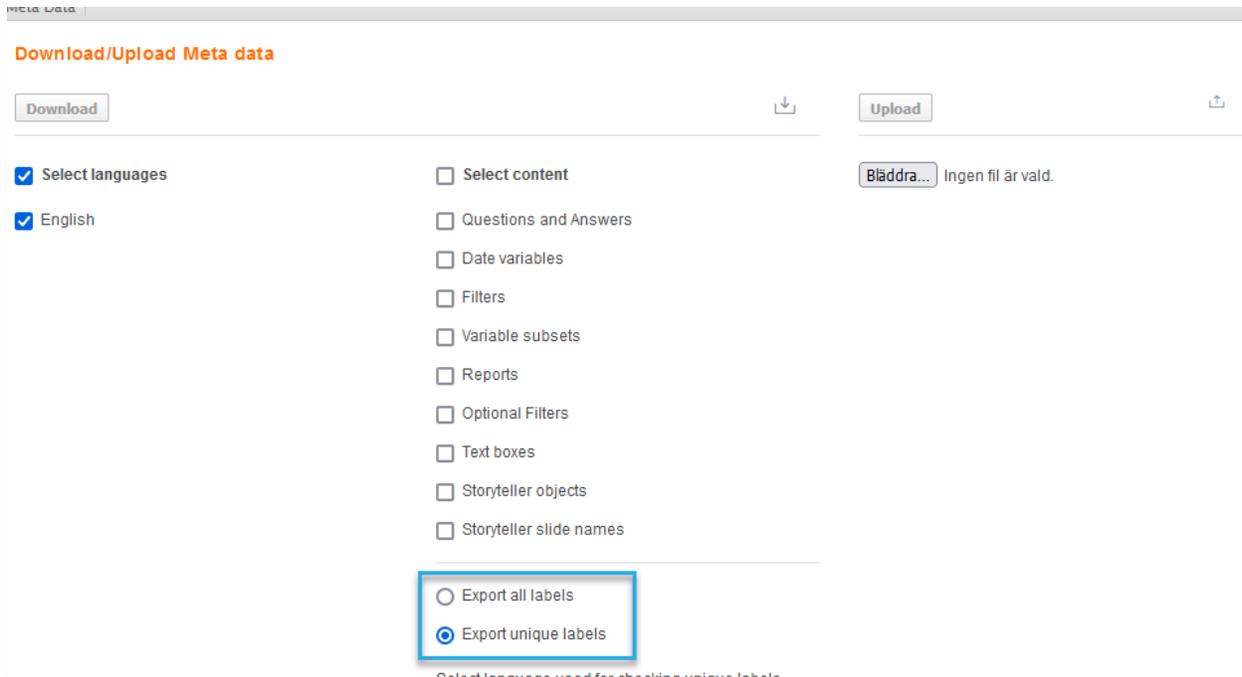
The downloaded file contains a column per language and an additional column showing label type which correspond to the download options. Below we see an example where the label "Gender" is used in a Question text, Filter label and in a Text box. When editing the "Gender" label and loading the file back the new label is inserted in all three places. If the downloaded file contained Filter text and Text boxes only these two items will be affected when the file is loaded back, the "Gender" label in question text is not updated as it never was included in the downloaded file.

	English	Used In	
1			
2	Report Text		
3	Advertising message	Question	
4	Spontaneous advertising awareness - In mind	Question	
5	Spontaneous advertising awareness - Top of mind	Question	
6	Market leader - Dap Telecom	Question	
7	Market leader - Donut Call	Question	
8	Market leader - Four	Question	
9	Market leader - Swedish Telecom	Question	
10	Market leader - Sweet Talk	Question	
11	Market leader - Telecom for You	Question	
12	Market leader - Duty Calls	Question	
13	Market leader - Tel Me More	Question	
14	Market leader - DonkeyCom	Question	
15	Market leader - WTC	Question	
16	Age group	Question , Filters	
17	Current operator	Question	
18	Gender	Question , Filters , Text boxes	
19	Household Income	Question	
20	Prepaid or Postpaid	Question , Filters	
21	Spontaneous brand awareness - In mind	Question	

8 Alchemer/SurveyGizmo data integration updates

Users can now choose which language is imported. In existing scheduled tasks the old default language will apply.

Here we see the list of available languages.
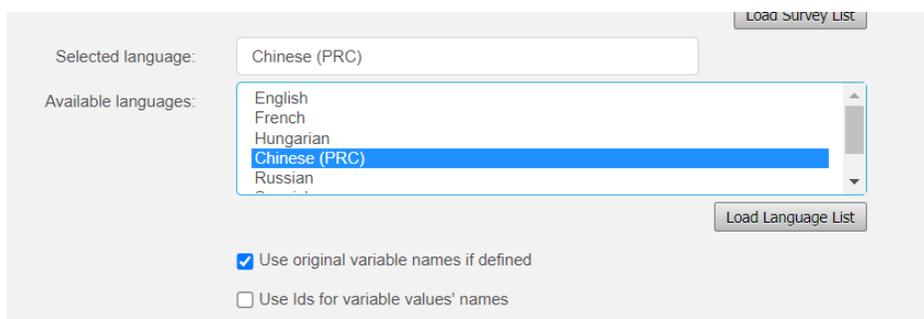
The Original variable names can now be imported as well, this means that the imported metadata will better match the SPSS files generated from Alchemer. To use this select the "Use original variable names if defined" option. Previously the integration would apply a "Q" prefix on numeric question codes, now the integration will use the SPSS Variable name from Alchemer, which is stored in the "varname" field.

Here we have "q3" which is the value received from the varname field, the question ID was 5, which means this would previously have been named Q5.

If there is no varname field and the ID is numeric the prefix DAP will be applied, previously the prefix Q was used, but this led to frequent clashes with other metadata.

Note, the new import options should be used in new surveys only as the question IDs will change and not match already imported data if applied to existing projects.