# Forsta Visualizations May 2022 Release

# Table of Contents

Forsta Visualizations May 2022 Release ..... 1
  1 Introduction ..... 3
  2 Overview ..... 4
  3 StoryTeller updates ..... 8
3.1 Shared cell formatting rules ..... 8
3.2 Variable subset support in Word clouds ..... 12
3.3 Improved value-based sorting ..... 14
  4 Project Administration ..... 16
4.1 New Data page ..... 16
  5 Data management ..... 43
5.1 Improved start time of scheduled data import jobs ..... 43
  6 Report user management ..... 45
6.1 Report user tagging ..... 45

# 1 Introduction

This document describes new and improved features in the Forsta Visualizations 2022 May Release.

If you would like to know more about these features, please contact the support team at dapresysupport@forsta.com and they will be able to assist you.

Best Regards,

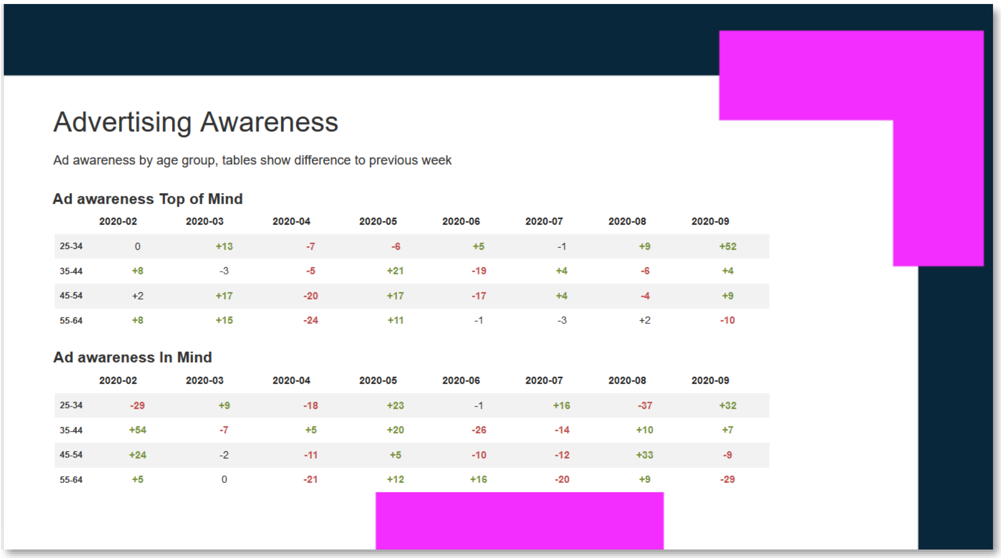
Forsta Team

# 2 Overview

The Forsta Visualizations 2022 May update contains some large improvements, see summary below.

**StoryTeller**

- Value-based cell formatting rules can now be shared between table objects for easier report setup and maintenance. Previously, the formatting rules were table specific, but it is possible to choose if the rule you create should be available in other tables. In the example below both tables use the same set of shared formatting rules, if the thresholds now need to be updated, it only needs to be set in one table.



Advertising Awareness

Ad awareness by age group, tables show difference to previous week

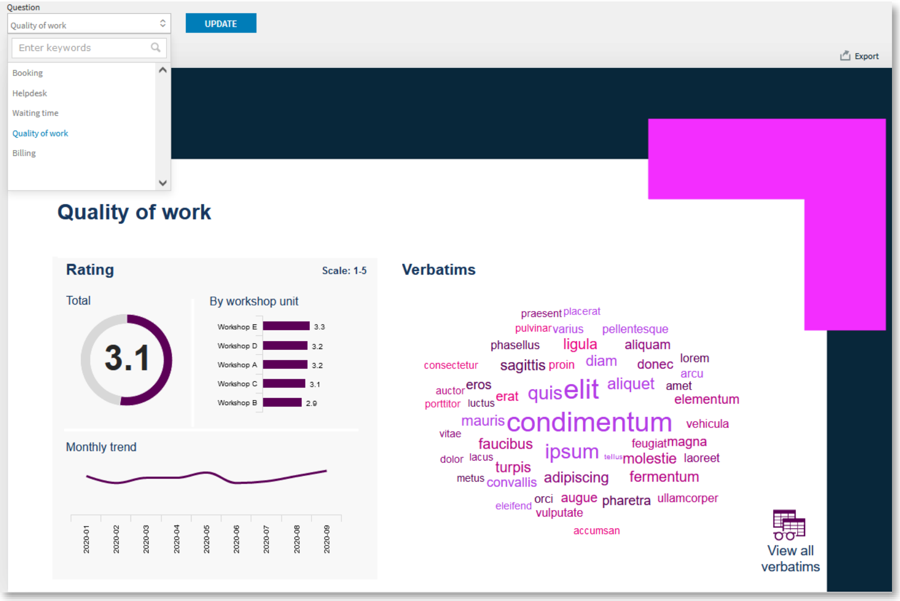
**Ad awareness Top of Mind**

| | 2020-02 | 2020-03 | 2020-04 | 2020-05 | 2020-06 | 2020-07 | 2020-08 | 2020-09 |
|---|---|---|---|---|---|---|---|---|
| 25-34 | 0 | +13 | -7 | -6 | +5 | -1 | +9 | +52 |
| 35-44 | +8 | -3 | -5 | +21 | -19 | +4 | -6 | +4 |
| 45-54 | +2 | +17 | -20 | +17 | -17 | +4 | -4 | +9 |
| 55-64 | +8 | +15 | -24 | +11 | -1 | -3 | +2 | -10 |

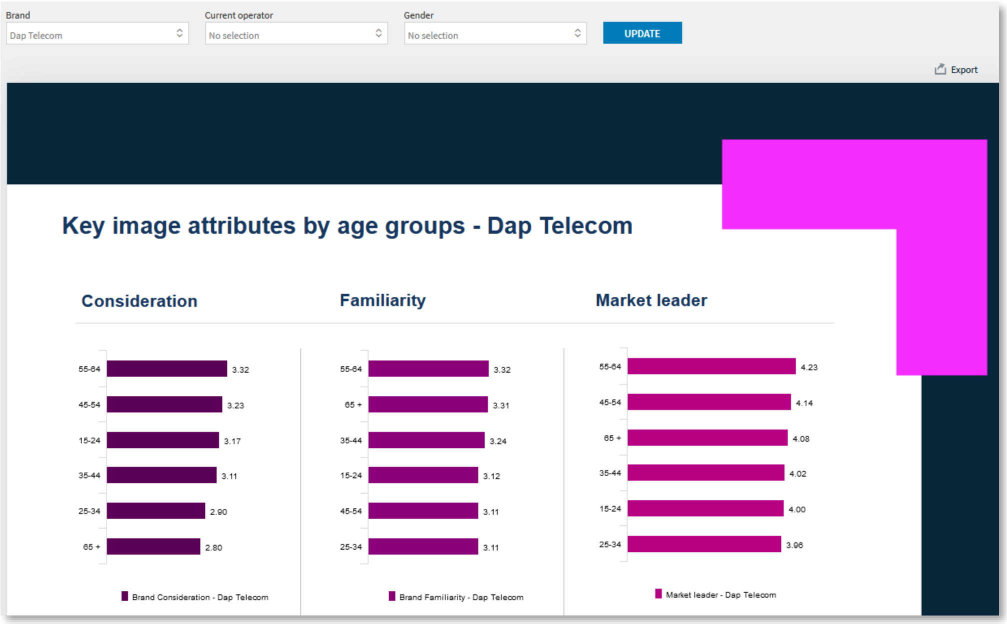
**Ad awareness In Mind**

| | 2020-02 | 2020-03 | 2020-04 | 2020-05 | 2020-06 | 2020-07 | 2020-08 | 2020-09 |
|---|---|---|---|---|---|---|---|---|
| 25-34 | -29 | +9 | -18 | +23 | -1 | +16 | -37 | +32 |
| 35-44 | +54 | -7 | +5 | +20 | -26 | -14 | +10 | +7 |
| 45-54 | +24 | -2 | -11 | +5 | -10 | -12 | +33 | -9 |
| 55-64 | +5 | 0 | -21 | +12 | +16 | -20 | +9 | -29 |

- The Word cloud object can now be “filtered” by Variable subsets which is useful in CX dashboards, for example, where the Report user selects a touchpoint to for which to view the result. In the example below the “Quality of work” touchpoint (a variable subset) is selected so both the charts and the word cloud show the result of quality of work related questions. Previously the word cloud could not be connected to variable subset filtering.


Question
Quality of work
UPDATE
Enter keywords
Booking
Helpdesk
Waiting time
Quality of work
Billing
Export
Quality of work
Rating
Scale: 1-5
Total
3.1
By workshop unit
Workshop E 3.3
Workshop D 3.2
Workshop A 3.2
Workshop C 3.1
Workshop B 2.9
Monthly trend
2020-01
2020-02
2020-03
2020-04
2020-05
2020-06
2020-07
2020-08
2020-09
Verbatims
praesent placerat
pulvinar varius pellentesque
phasellus ligula aliquam
consectetur sagittis proin diam donec lorem
arcu
auctor eros erat quis elit aliquet amet
porttitor luctus elementum
mauris condimentum vehicula
vitae
faucibus ipsum feugiat magna
dolor lacus tellus molestie laoreet
turpis
metus convallis adipiscing fermentum
eleifend orci augue pharetra ullamcorper
vulputate
accumsan
View all verbatims

- The value-based sorting function, in charts and tables, is improved to better support reports where the report user can apply variable subsets and optional filter compares.
  Below is an example where the new logic is applied, each of the charts show an image attribute of the selected brand (a variable subset), split by ager groups, and sorted by value. The value sorting in these charts is based on "first available" question in the legend to work with the brand (Variable subset) selection. Up until now a specific question had to be used as base for sorting which did not work when the shown question was changed by the Variable subset selection.



Brand: Dap Telecom
Current operator: No selection
Gender: No selection

UPDATE
Export
Key image attributes by age groups - Dap Telecom
Consideration
55-64
3.32
45-54
3.23
15-24
3.17
35-44
3.11
25-34
2.90
65 +
2.80
Brand Consideration - Dap Telecom
Familiarity
55-64
3.32
65 +
3.31
35-44
3.24
15-24
3.12
45-54
3.11
25-34
3.11
Brand Familiarity - Dap Telecom
Market leader
55-64
4.23
45-54
4.14
65 +
4.08
35-44
4.02
15-24
4.00
25-34
3.96
Market leader - Dap Telecom

## Project Administration

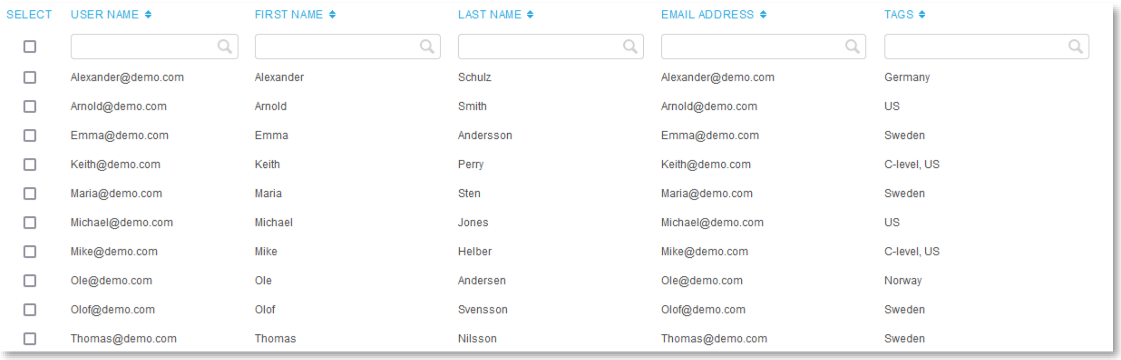
- A new Data page has been created. This new page includes imports (both manual and scheduled), activation and the option to delete case and meta data.

## Data management

- The start time of hourly scheduled import jobs can now be set on a minute level and not just on full and half hour which gives you better control of when data is imported.

## Report user administration

- Report users can now be tagged for more efficient user administration. As an example, the users can be tagged with their country in a multi country survey which makes it quicker to search for and invite all the users from a certain country. Below is an example of tags in rightmost column.



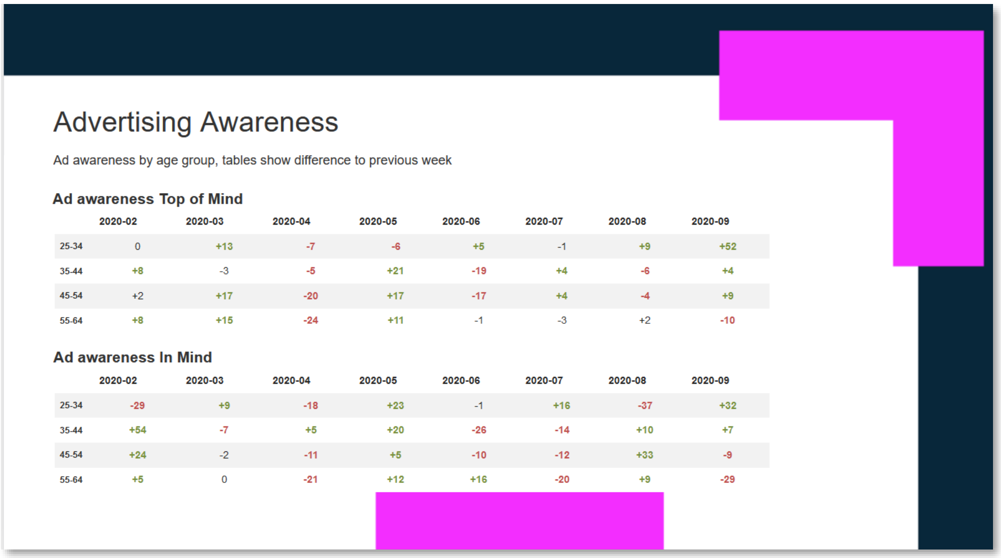
| SELECT | USER NAME | FIRST NAME | LAST NAME | EMAIL ADDRESS | TAGS |
|---|---|---|---|---|---|
| ☐ | | | | | |
| ☐ | Alexander@demo.com | Alexander | Schulz | Alexander@demo.com | Germany |
| ☐ | Arnold@demo.com | Arnold | Smith | Arnold@demo.com | US |
| ☐ | Emma@demo.com | Emma | Andersson | Emma@demo.com | Sweden |
| ☐ | Keith@demo.com | Keith | Perry | Keith@demo.com | C-level, US |
| ☐ | Maria@demo.com | Maria | Sten | Maria@demo.com | Sweden |
| ☐ | Michael@demo.com | Michael | Jones | Michael@demo.com | US |
| ☐ | Mike@demo.com | Mike | Helber | Mike@demo.com | C-level, US |
| ☐ | Ole@demo.com | Ole | Andersen | Ole@demo.com | Norway |
| ☐ | Olof@demo.com | Olof | Svensson | Olof@demo.com | Sweden |
| ☐ | Thomas@demo.com | Thomas | Nilsson | Thomas@demo.com | Sweden |

# 3 StoryTeller updates

## 3.1 Shared cell formatting rules

Value-based cell formatting rules can now be shared between table objects for improved efficiency in report setup and maintenance. Previously, formatting rules were created and applied to each table but now you can set rules for all tables which share rules at once. In the example, below both tables use the same set of shared formatting rules, if the thresholds now need to be updated it only needs to be done in one of the tables, which saves you time.

*Example report where two tables share the same cell formatting rules.*



Advertising Awareness

Ad awareness by age group, tables show difference to previous week

**Ad awareness Top of Mind**

| | 2020-02 | 2020-03 | 2020-04 | 2020-05 | 2020-06 | 2020-07 | 2020-08 | 2020-09 |
|---|---|---|---|---|---|---|---|---|
| 25-34 | 0 | +13 | -7 | -6 | +5 | -1 | +9 | +52 |
| 35-44 | +8 | -3 | -5 | +21 | -19 | +4 | -6 | +4 |
| 45-54 | +2 | +17 | -20 | +17 | -17 | +4 | -4 | +9 |
| 55-64 | +8 | +15 | -24 | +11 | -1 | -3 | +2 | -10 |

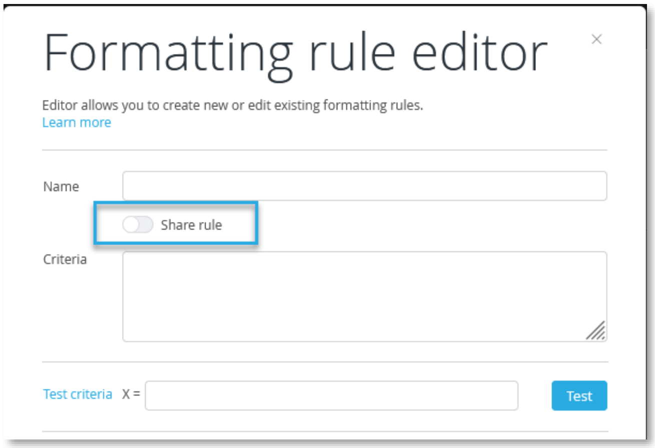
**Ad awareness In Mind**

| | 2020-02 | 2020-03 | 2020-04 | 2020-05 | 2020-06 | 2020-07 | 2020-08 | 2020-09 |
|---|---|---|---|---|---|---|---|---|
| 25-34 | -29 | +9 | -18 | +23 | -1 | +16 | -37 | +32 |
| 35-44 | +54 | -7 | +5 | +20 | -26 | -14 | +10 | +7 |
| 45-54 | +24 | -2 | -11 | +5 | -10 | -12 | +33 | -9 |
| 55-64 | +5 | 0 | -21 | +12 | +16 | -20 | +9 | -29 |

### *3.1.1 Setup*

The formatting rules are just like before created inside the tables object, if a rule should be shared with other tables enbale the new “Share rule” option shown in the image below. When the “Share rule” is enabled the rule can be added to any other table in any StoryTeller/Drilldown report within the same project.

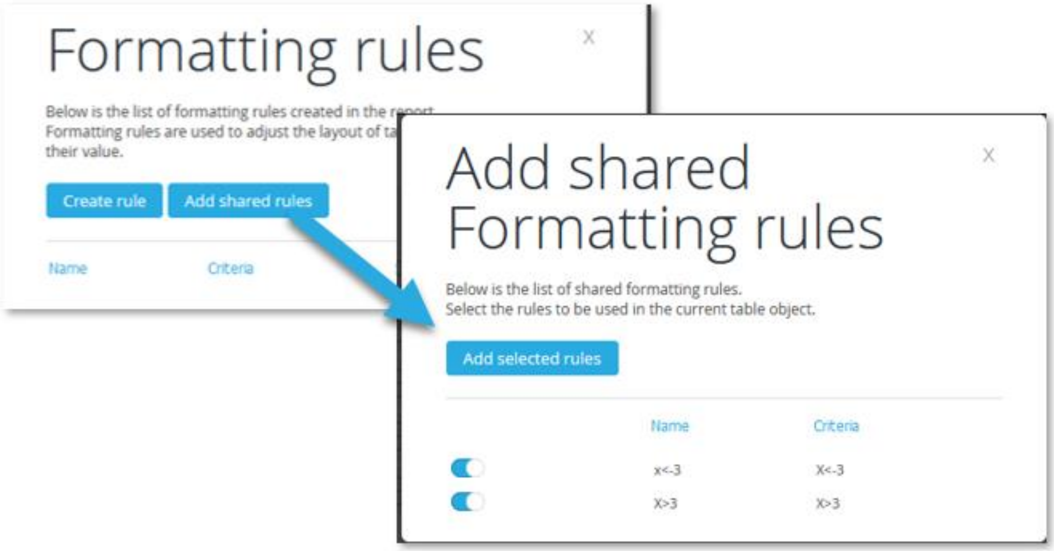
*The new share rule option: when it is enabled the rule will be used in other table objects set to share rules.*


Formatting rule editor
×
Name
Share rule
Criteria
Test criteria
X =
Test

Editor allows you to create new or edit existing formatting rules.
Learn more

To add a shared rule to a table object use the new "Add shared rules" option in the Formatting rules panel as shown below, in the appearing list select the rules to be inserted and click "Add selected rules".

*Here we see how shared rules can be added to a table object.*


Formatting rules
X
Create rule
Add shared rules
Name
Criteria
Add shared Formatting rules
X
Add selected rules

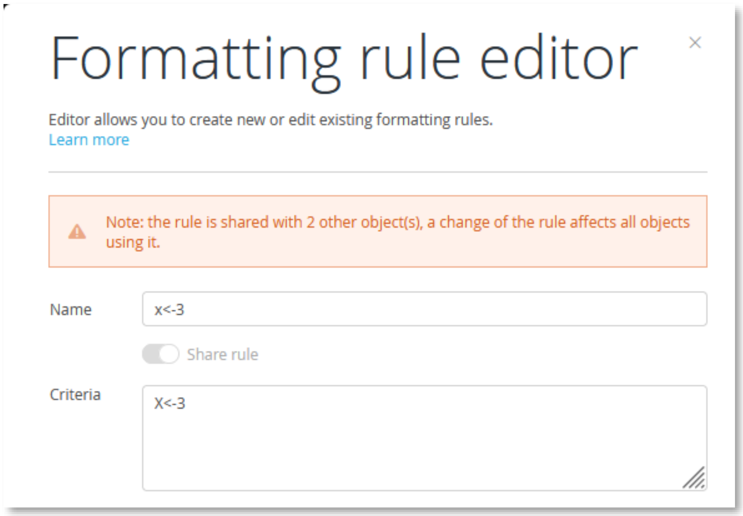
Below is the list of formatting rules created in the report.
Formatting rules are used to adjust the layout of ta
their value.

Below is the list of shared formatting rules.
Select the rules to be used in the current table object.

| | Name | Criteria |
|---|---|---|
| ● | x<-3 | X<-3 |
| ● | X>3 | X>3 |

A shared rule can be edited from any of the objects using it, the update is applied to all of the tables.
The “Share rule” setting can only be disabled if the rule is present in a single table, as soon as the rule is used in multiple tables the sharing cannot be disabled.

*Edit formatting rule view, as the rule is shared and used in other tables the “Share rule” toggle is disabeld.*



Formatting rule editor

Editor allows you to create new or edit existing formatting rules.
Learn more

Note: the rule is shared with 2 other object(s), a change of the rule affects all objects using it.

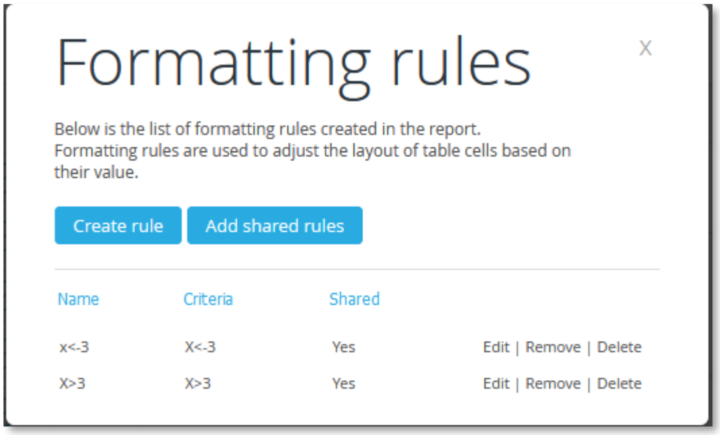
Name: x<-3

Share rule

Criteria: X<-3

In the list of rules applied to a table a new “Share” column shows if the rule is shared or not. A shared rule can be removed from the current table or completely deleted (deleted from all tables using it).

*The "Remove" and the "Delete" options are shown below, use the "Delete" option with care as the rule becomes deleted from all the tables using it (a warning message is shown on Delete)*



Formatting rules

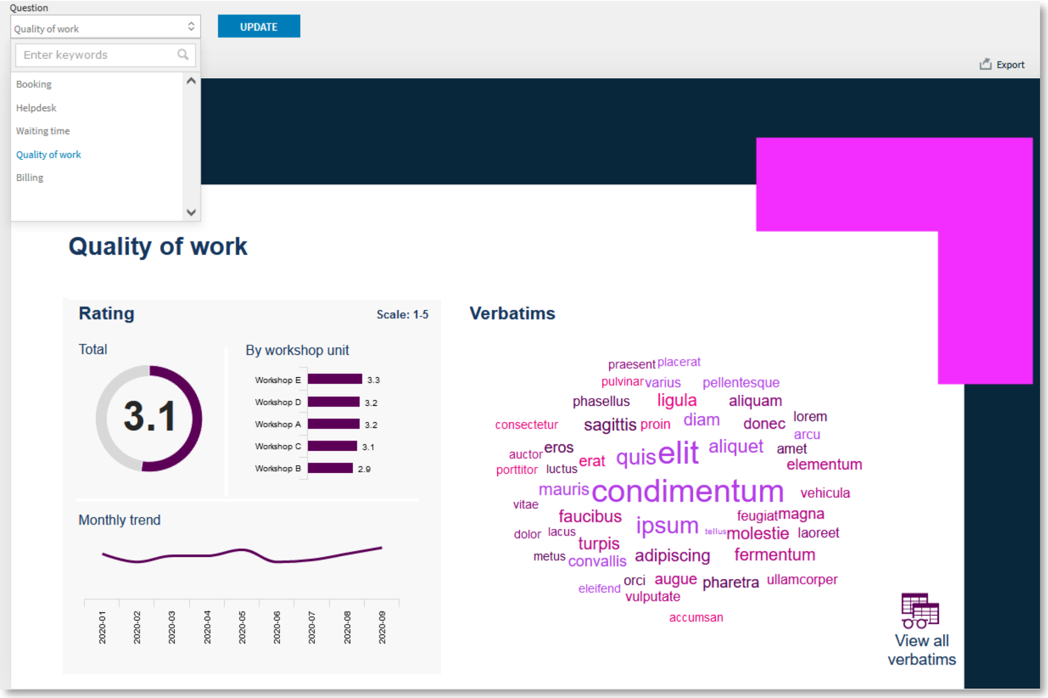
Below is the list of formatting rules created in the report. Formatting rules are used to adjust the layout of table cells based on their value.

| Name | Criteria | Shared | |
|---|---|---|---|
| x<-3 | X<-3 | Yes | Edit \| Remove \| Delete |
| X>3 | X>3 | Yes | Edit \| Remove \| Delete |

Note, a shared rule is automatically deleted if all the tables using it are deleted.

## 3.2 Variable subset support in Word clouds

The word cloud object can now be filtered by variable subsets which, for example, is useful in CX dashboards where the report user selects a touchpoint for which to view the result. In the example below the "Quality of work" touchpoint (a variable subset) is selected so both the charts and the word cloud shows the result of quality of work-related questions. Previously the word cloud could not be connected to variable subset filtering.

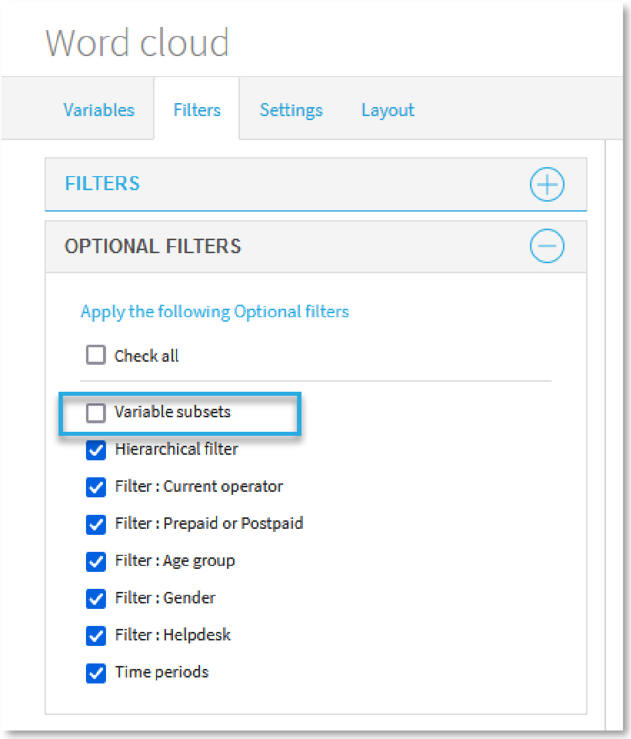

Question
Quality of work
UPDATE
Enter keywords
Booking
Helpdesk
Waiting time
Quality of work
Billing
Export
Quality of work
Rating
Scale: 1-5
Total
3.1
By workshop unit
Workshop E 3.3
Workshop D 3.2
Workshop A 3.2
Workshop C 3.1
Workshop B 2.9
Monthly trend
2020-01
2020-02
2020-03
2020-04
2020-05
2020-06
2020-07
2020-08
2020-09
Verbatims
praesent placerat
pulvinar varius pellentesque
phasellus ligula aliquam
consectetur sagittis proin diam donec lorem
arcu
auctor eros quis elit aliquet amet
porttitor luctus erat elementum
mauris condimentum vehicula
vitae
faucibus ipsum feugiat magna
dolor lacus tellus molestie laoreet
turpis
metus convallis adipiscing fermentum
eleifend orci augue pharetra ullamcorper
vulputate
accumsan
View all verbatims

### *3.2.1 Setup*

Like other StoryTeller objects, such as charts and tables, variable subsets are applied to newly created word clouds by default.

If the word cloud should not be affected by the variable subset selection enter the filter/optional filter panel and untick the variable subset option (see image further down).

All existing Word cloud objects are by default excluded from variable subset filtering so their behaviour is not affected by the version update.


Word cloud
Variables
Filters
Settings
Layout
FILTERS
OPTIONAL FILTERS

Apply the following Optional filters

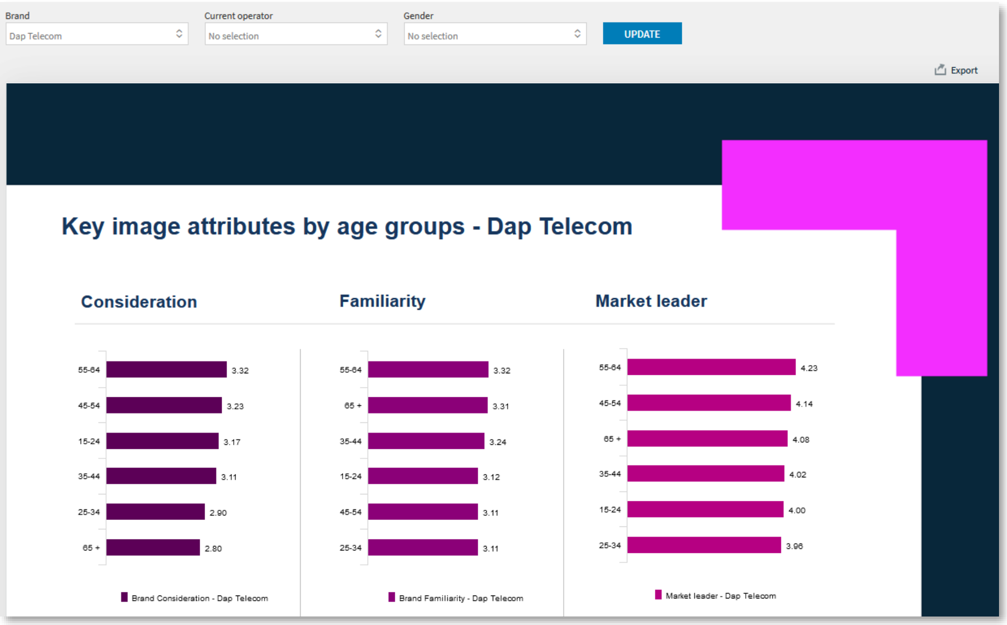
☐ Check all

☐ Variable subsets
☑ Hierarchical filter
☑ Filter : Current operator
☑ Filter : Prepaid or Postpaid
☑ Filter : Age group
☑ Filter : Gender
☑ Filter : Helpdesk
☑ Time periods

## 3.3 Improved value-based sorting

The value-based sorting function, in charts and tables, is improved to better support reports where the report user can apply variable subsets and optional filter compares.

Below is an example where the function is applied, each of the charts show an image attribute of the selected brand (a variable subset), split by age groups, and sorted by value. The value sorting in these charts is based on "first available" question in the legend to work with the brand (variable subset) selection. Previously a specific question had to be used as base for sorting which did not work when the shown question was changed by the variable subset selection.

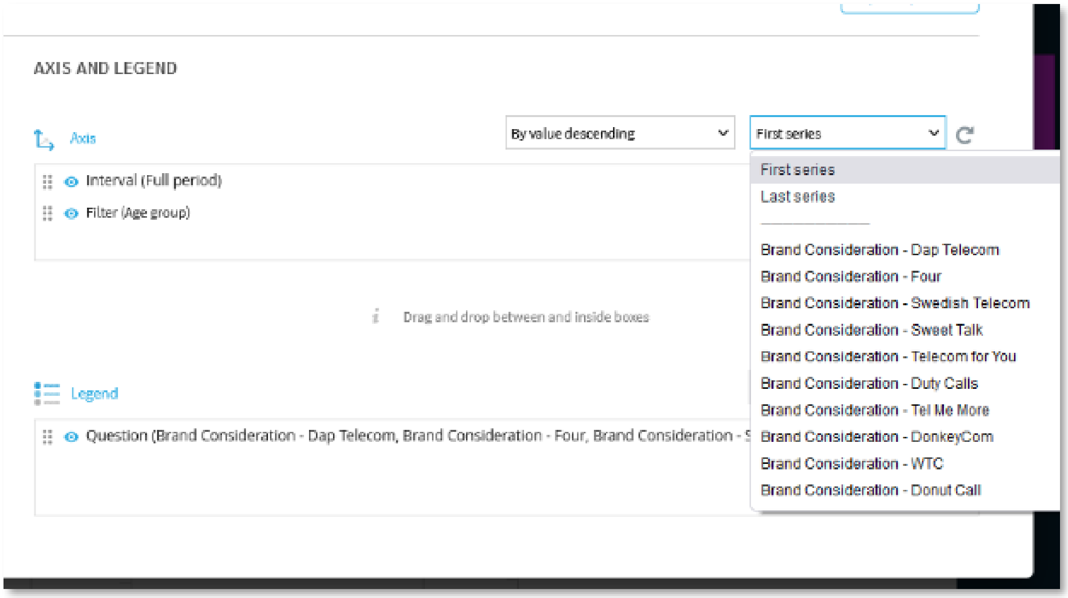


Brand: Dap Telecom
Current operator: No selection
Gender: No selection

UPDATE
Export
Key image attributes by age groups - Dap Telecom
Consideration
55-64 3.32
45-54 3.23
15-24 3.17
35-44 3.11
25-34 2.90
65 + 2.80
Brand Consideration - Dap Telecom
Familiarity
55-64 3.32
65 + 3.31
35-44 3.24
15-24 3.12
45-54 3.11
25-34 3.11
Brand Familiarity - Dap Telecom
Market leader
55-64 4.23
45-54 4.14
65 + 4.08
35-44 4.02
15-24 4.00
25-34 3.96
Market leader - Dap Telecom

### *3.3.1 Setup*

When applying value based sorting to a chart or a table you previously had to specify which series to base the sorting on. To support cases where a specific item cannot always be used as base for sorting a "First item" and "Last item" have been introduced in the sorting list as shown in the image below. When "First item" is selected the first avaibale legend item is used as base for the sorting, if "Last item" is selected the last available legend item is used.


AXIS AND LEGEND
Axis
By value descending
First series
Interval (Full period)
Filter (Age group)
Drag and drop between and inside boxes
Legend
Question (Brand Consideration - Dap Telecom, Brand Consideration - Four, Brand Consideration - S
First series
Last series
Brand Consideration - Dap Telecom
Brand Consideration - Four
Brand Consideration - Swedish Telecom
Brand Consideration - Sweet Talk
Brand Consideration - Telecom for You
Brand Consideration - Duty Calls
Brand Consideration - Tel Me More
Brand Consideration - DonkeyCom
Brand Consideration - WTC
Brand Consideration - Donut Call

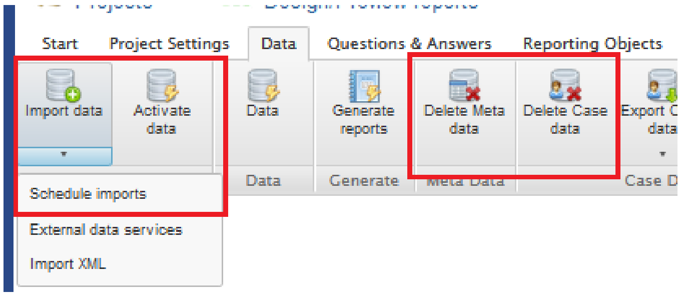
# 4 Project Administration

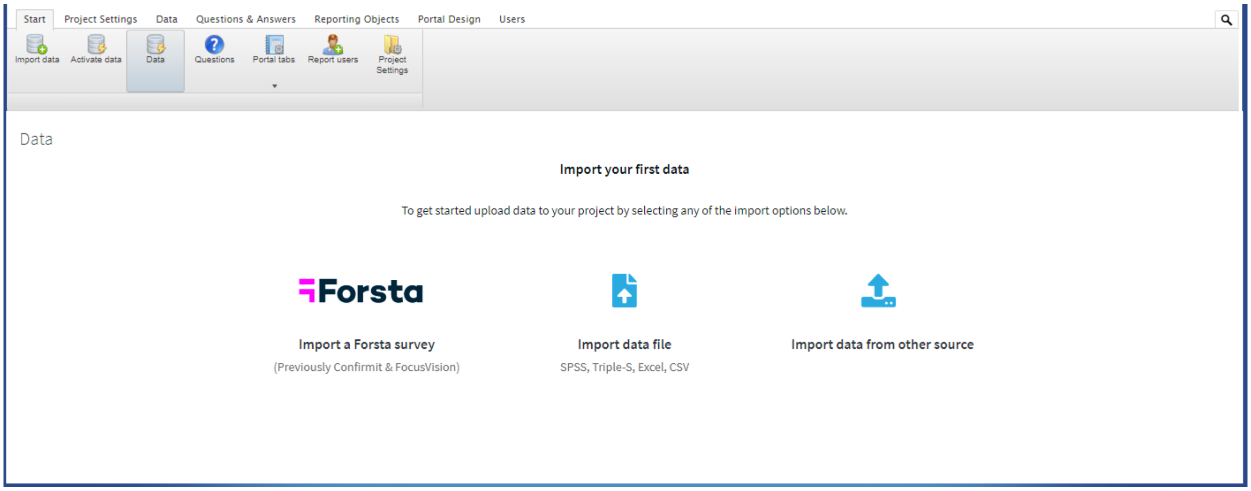
## 4.1 New Data page

A new and improved data page has been added to our back end. This page merges five older pages together into one new one. The merged pages are:

Import data, activate data, delete case data, delete meta data and the import scheduler.

A new, more user-friendly import page for direct imports from Forsta Surveys and Survey Designer is added. Here you can both import data immediately and set up scheduled tasks.


Start
Project Settings
Data
Questions & Answers
Reporting Objects
Import data
Activate data
Data
Generate reports
Delete Meta data
Delete Case data
Export C data
Data
Generate
Meta Data
Case D
Schedule imports
External data services
Import XML


Start
Project Settings
Data
Questions & Answers
Reporting Objects
Portal Design
Users
Import data
Activate data
Data
Questions
Portal tabs
Report users
Project Settings
Data

**Import your first data**

To get started upload data to your project by selecting any of the import options below.

Forsta

**Import a Forsta survey**
(Previously Confirmit & FocusVision)

**Import data file**
SPSS, Triple-S, Excel, CSV

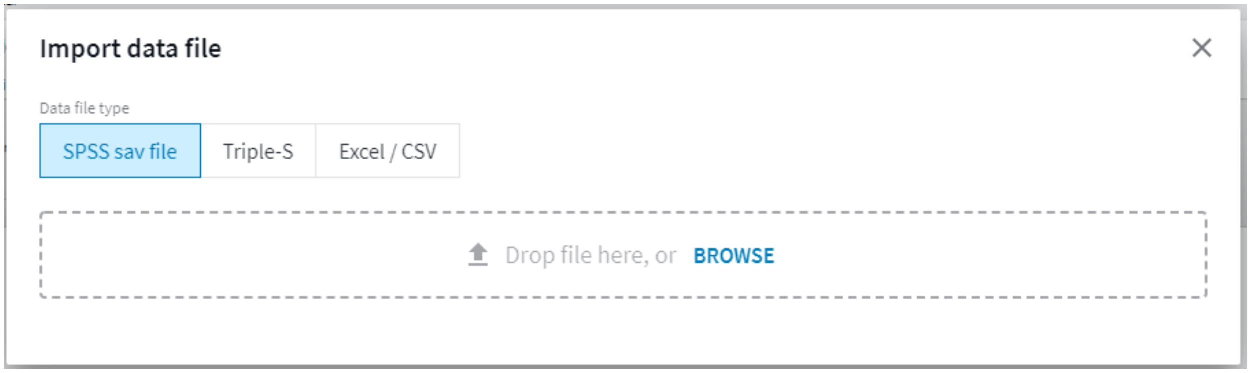
**Import data from other source**

Here you have 3 options.

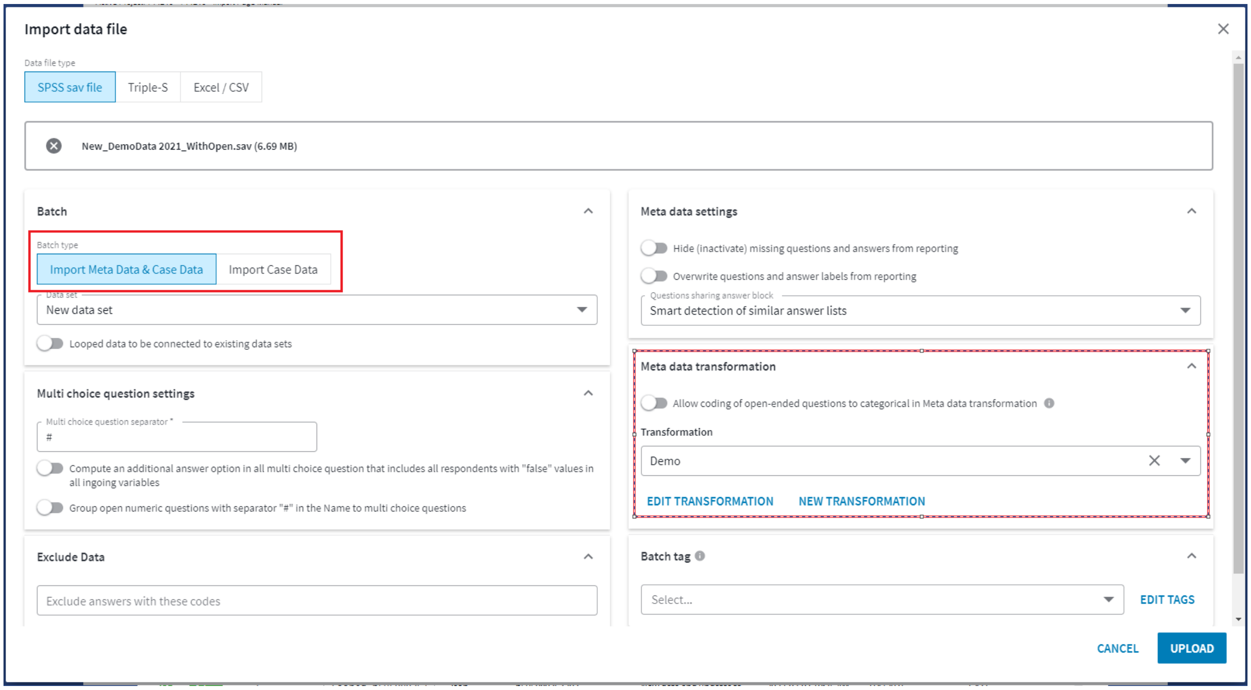
Import data from Forsta Survey, import data from a local file on your computer or import data from a different source, e.g., integrations to other survey platforms or files from an FTP server.

## 4.1 Import data

To import data from a local file on your computer, select "Import data file". There will be a popup asking to browser for the file.



Once the file is selected, all import options are shown. There are no new or removed import settings compared to the old import page. There are some minor text updates, to explain the settings better. There are also two different default settings. By default, "Meta data & Case data" is now selected, and the option to use Meta Data Transformation is always enabled. This doesn't mean that a transformation must be used for every import. Only the additional step to enable it that has been removed.



Import data file

Data file type

SPSS sav file | Triple-S | Excel / CSV

New_DemoData 2021_WithOpen.sav (6.69 MB)

Batch

Batch type: Import Meta Data & Case Data | Import Case Data

Data set: New data set

Looped data to be connected to existing data sets

Multi choice question settings

Multi choice question separator *: #

Compute an additional answer option in all multi choice question that includes all respondents with "false" values in all ingoing variables

Group open numeric questions with separator "#" in the Name to multi choice questions

Exclude Data

Exclude answers with these codes

Meta data settings

Hide (inactivate) missing questions and answers from reporting

Overwrite questions and answer labels from reporting

Questions sharing answer block: Smart detection of similar answer lists

Meta data transformation

Allow coding of open-ended questions to categorical in Meta data transformation

Transformation: Demo

EDIT TRANSFORMATION NEW TRANSFORMATION

Batch tag

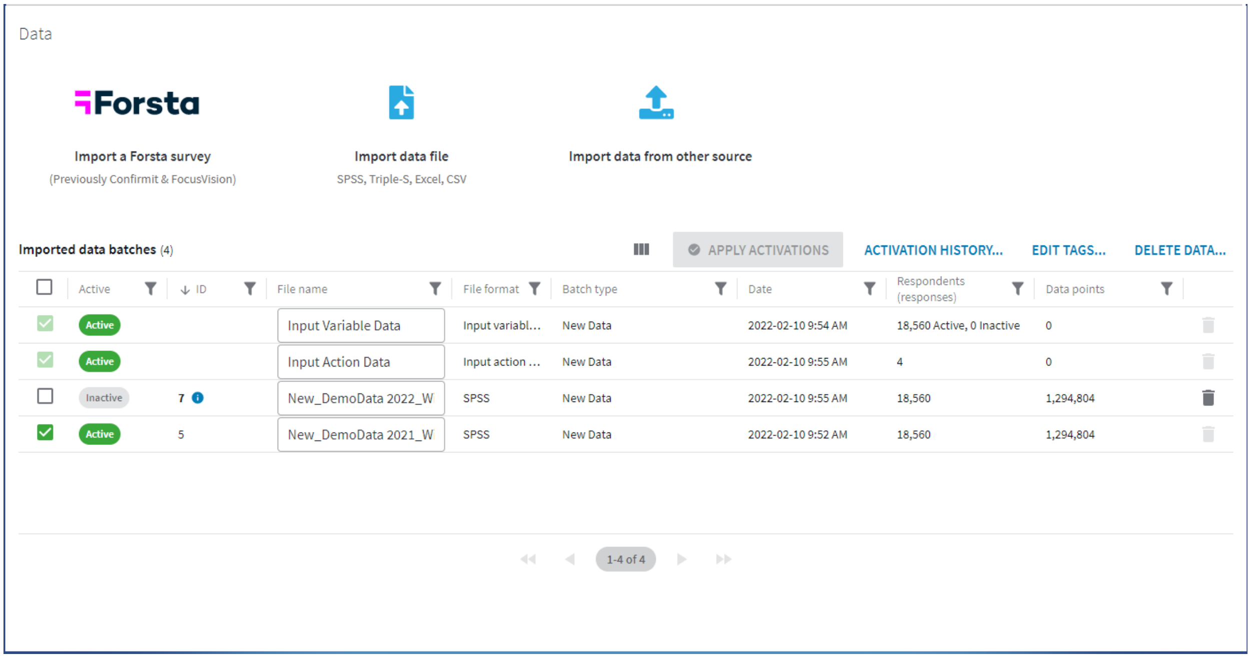
Select...

EDIT TAGS

CANCEL UPLOAD

## 4.2 Activation

To activate data batches, select them with the checkboxes to the left, and click “Apply Activations”. Search functions have been added to each column to be able to find specific batches. Small info messages have also been added to notify for new batches and if no batch is activated at all.

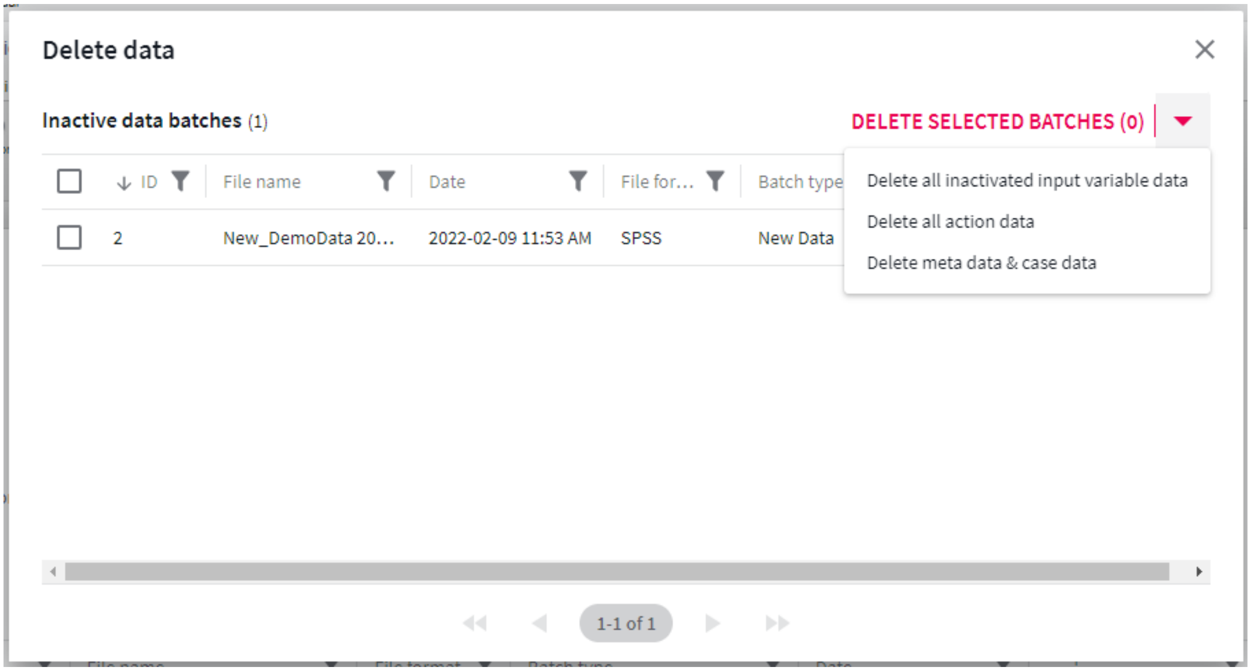

Data
Forsta
Import a Forsta survey
(Previously Confirmit & FocusVision)
Import data file
SPSS, Triple-S, Excel, CSV
Import data from other source
APPLY ACTIVATIONS
ACTIVATION HISTORY...
EDIT TAGS...
DELETE DATA...
1-4 of 4

Imported data batches (4)

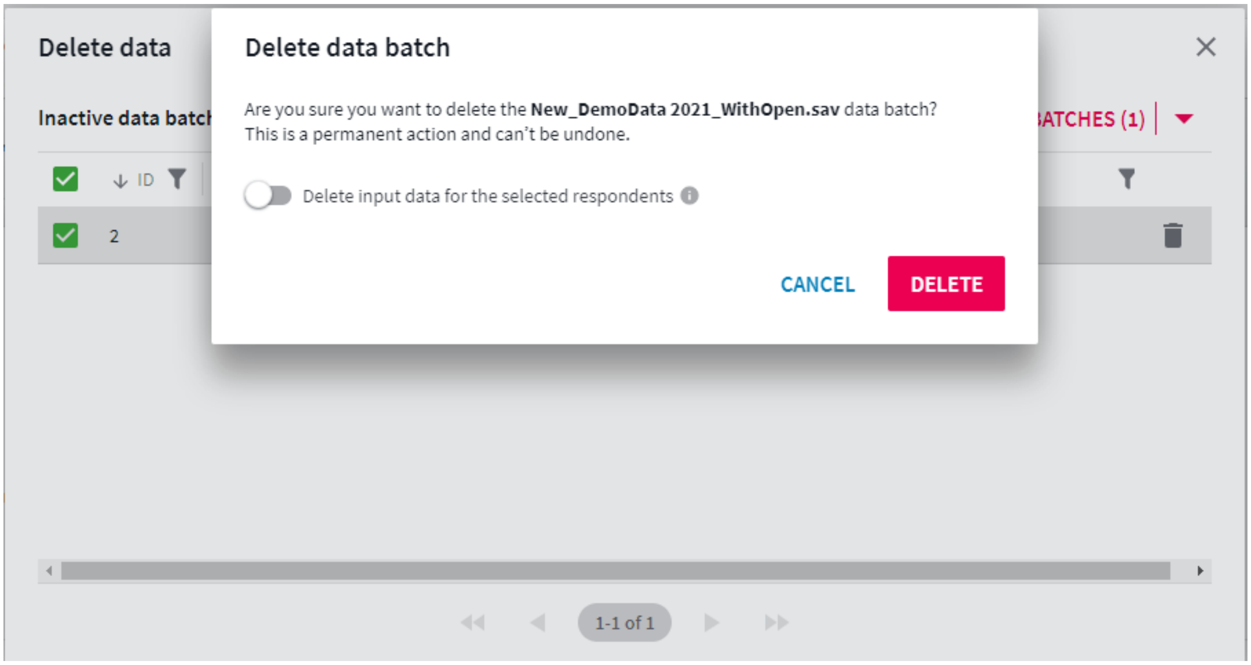
| ☐ | Active | ID | File name | File format | Batch type | Date | Respondents (responses) | Data points |
|---|---|---|---|---|---|---|---|---|
| ☑ | Active | | Input Variable Data | Input variabl... | New Data | 2022-02-10 9:54 AM | 18,560 Active, 0 Inactive | 0 |
| ☑ | Active | | Input Action Data | Input action ... | New Data | 2022-02-10 9:55 AM | 4 | 0 |
| ☐ | Inactive | 7 | New_DemoData 2022_W | SPSS | New Data | 2022-02-10 9:55 AM | 18,560 | 1,294,804 |
| ☑ | Active | 5 | New_DemoData 2021_W | SPSS | New Data | 2022-02-10 9:52 AM | 18,560 | 1,294,804 |

## *4.3 Delete Case and Meta data*

The new “Delete data” page includes all types of data deletions. (Case data, Meta data, Input data and Action data.) The new page is a popup showing all inactivate batches. By clicking “Delete selected batches” case data will be deleted from the system. If Input data is connected to the respondents in the selected batch, the option to delete input for these respondents are shown. In the dropdown to the right, options to delete inactivated Input data, Action data and Meta Data are shown.


Delete data
Inactive data batches (1)
DELETE SELECTED BATCHES (0)
Delete all inactivated input variable data
Delete all action data
Delete meta data & case data
1-1 of 1

| ☐ | ID | File name | Date | File for… | Batch type |
|---|---|---|---|---|---|
| ☐ | 2 | New_DemoData 20… | 2022-02-09 11:53 AM | SPSS | New Data |


Delete data
Inactive data batch
ATCHES (1)
☑ ID
☑ 2
1-1 of 1

## Delete data batch

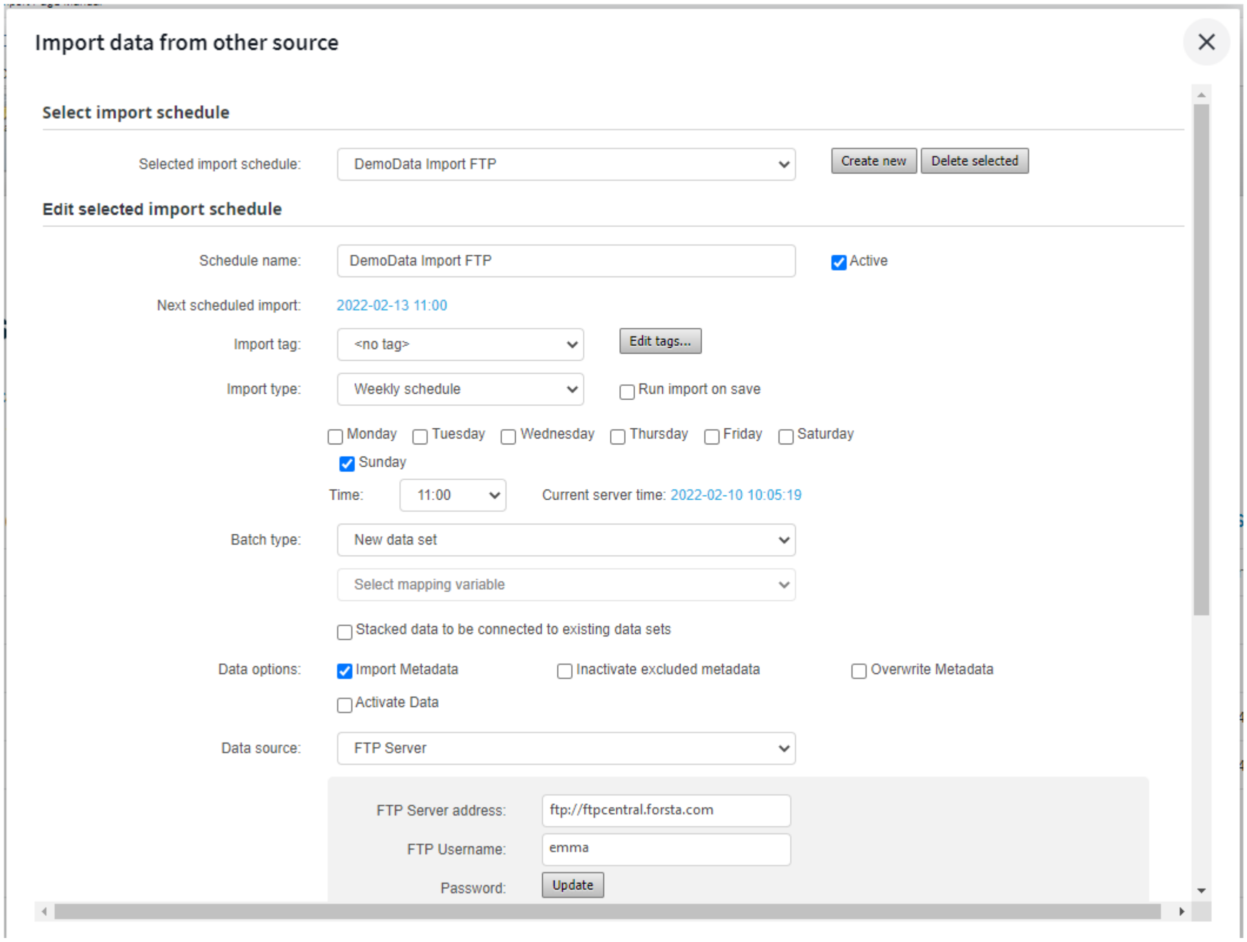
Are you sure you want to delete the **New_DemoData 2021_WithOpen.sav** data batch? This is a permanent action and can't be undone.

○ Delete input data for the selected respondents

CANCEL
DELETE

## *4.4 Import data from other source (Scheduled import)*

This page has not been changed. It's just easier to find it and create import tasks from integrations and FTP servers. All existing import tasks will be shown here. (Including existing import tasks from Forsta Surveys and Survey Designer.) No new import tasks for Forsta Surveys and Survey Designer can be created here. Use Forsta Import for new tasks.



**Import data from other source**

**Select import schedule**

Selected import schedule: DemoData Import FTP

**Edit selected import schedule**

Schedule name: DemoData Import FTP ☑ Active

Next scheduled import: 2022-02-13 11:00

Import tag: <no tag>

Import type: Weekly schedule ☐ Run import on save

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday
☑ Sunday

Time: 11:00 Current server time: 2022-02-10 10:05:19

Batch type: New data set

Select mapping variable

☐ Stacked data to be connected to existing data sets

Data options: ☑ Import Metadata ☐ Inactivate excluded metadata ☐ Overwrite Metadata
☐ Activate Data

Data source: FTP Server

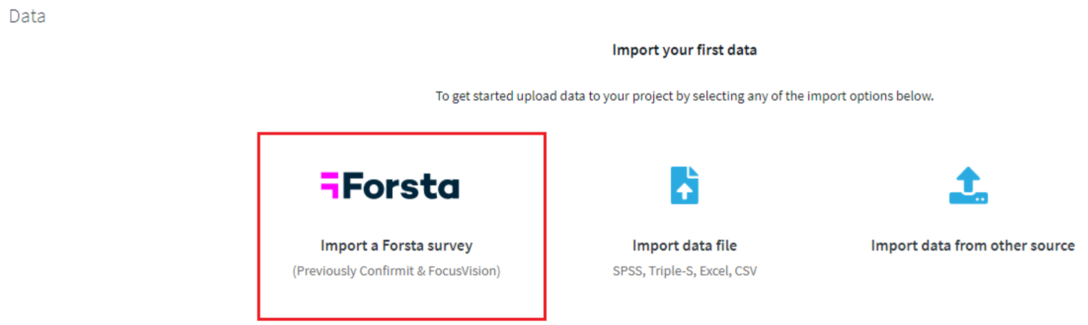
FTP Server address: ftp://ftpcentral.forsta.com

FTP Username: emma

Password:

## *4.5 Forsta Import*

The new option to import data directly from Forsta Surveys and Survey Designer is added under the main Forsta button. Depending on what type of access the admin has, this button will generate different access. (Either direct access to Forsta Surveys or Survey Designer, or a choice of which system to access.)



Data
Forsta
Import a Forsta survey
(Previously Confirmit & FocusVision)
Import data file
SPSS, Triple-S, Excel, CSV
Import data from other source

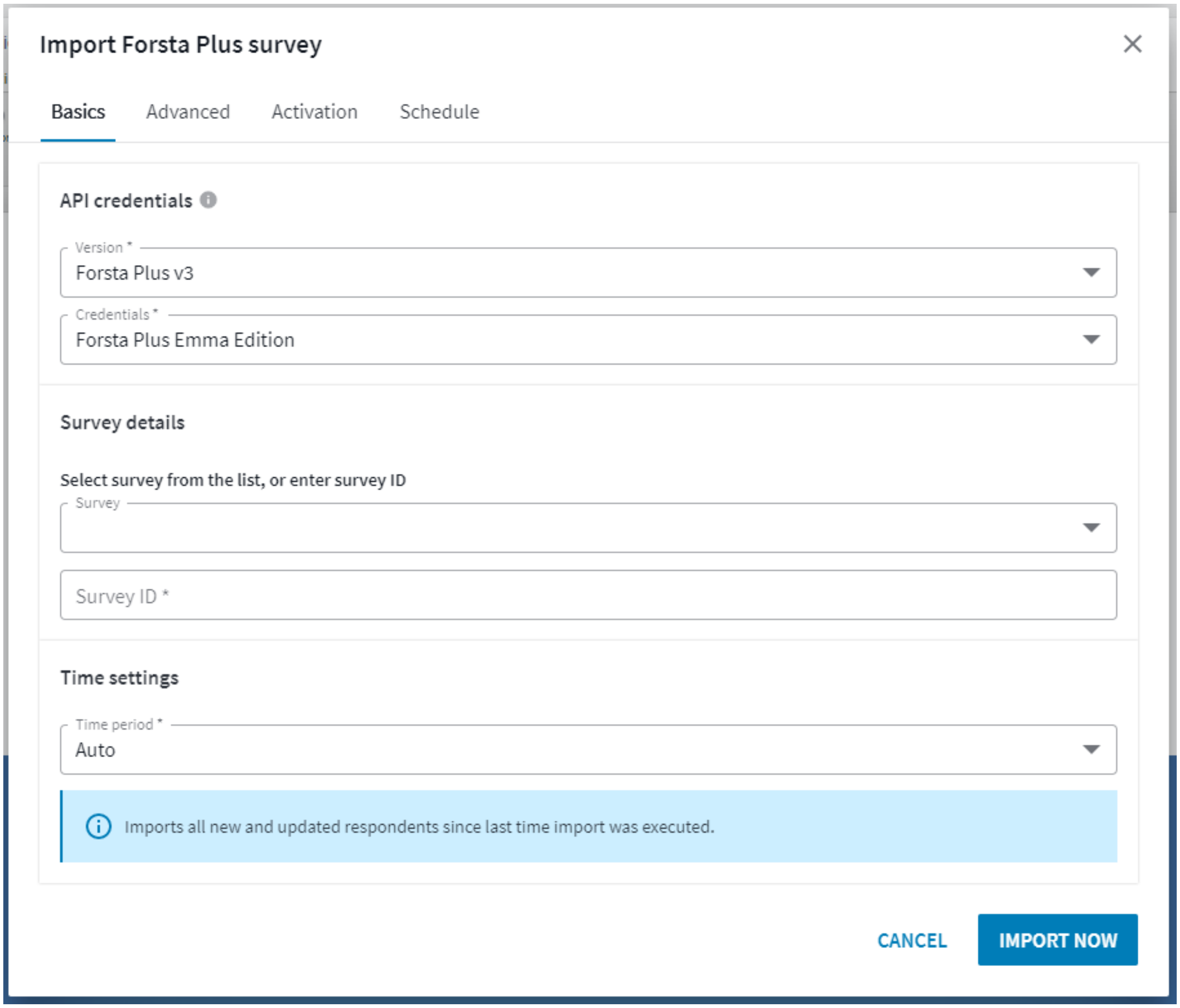
Import your first data

To get started upload data to your project by selecting any of the import options below.

No matter what system the task is connected to, cards will be created to visualize and give a better overview of the connections. These cards show information about the task, no matter if the task is scheduled or a one-time import. All tasks can be edited and updated by editing the tile.

### 4.5.1 Forsta Plus – Survey Designer (Previously Confirmit - Survey Designer)

Basics



Import Forsta Plus survey

API credentials

Version *: Forsta Plus v3

Credentials *: Forsta Plus Emma Edition

Survey details

Select survey from the list, or enter survey ID

Survey:

Survey ID *

Time settings

Time period *: Auto

Imports all new and updated respondents since last time import was executed.

*API Credentials*

When importing data from Survey Designer, API credentials are needed. These credentials can be saved on a customer level within Forsta Visualization or added per task. (Please contact your Forsta contact person to set it up on a customer level.) If added manually in each task, URL, Client ID and Client Secret is needed. This information can be accessed through Forsta Plus support.

### *Survey Details*

Select which survey to connect the project to. Surveys shown in the dropdown list are surveys the API user have access to. Regular surveys are shown with a blue icon before the name, and AutoCombined surveys are shown with a green icon before the name.

### *Time settings*

By default, “Auto” will be used as Time period for the import task. This means that in the first import, all data will be imported. In the next import for this task, only the new and updated respondents will be imported. Other options here are “Total” – Importing all respondents every time the import task is executed. “Static” – importing all respondents where the date on “interview_end” is between two selected dates. (It “interview_end” is empty, “interview_start” is used.)

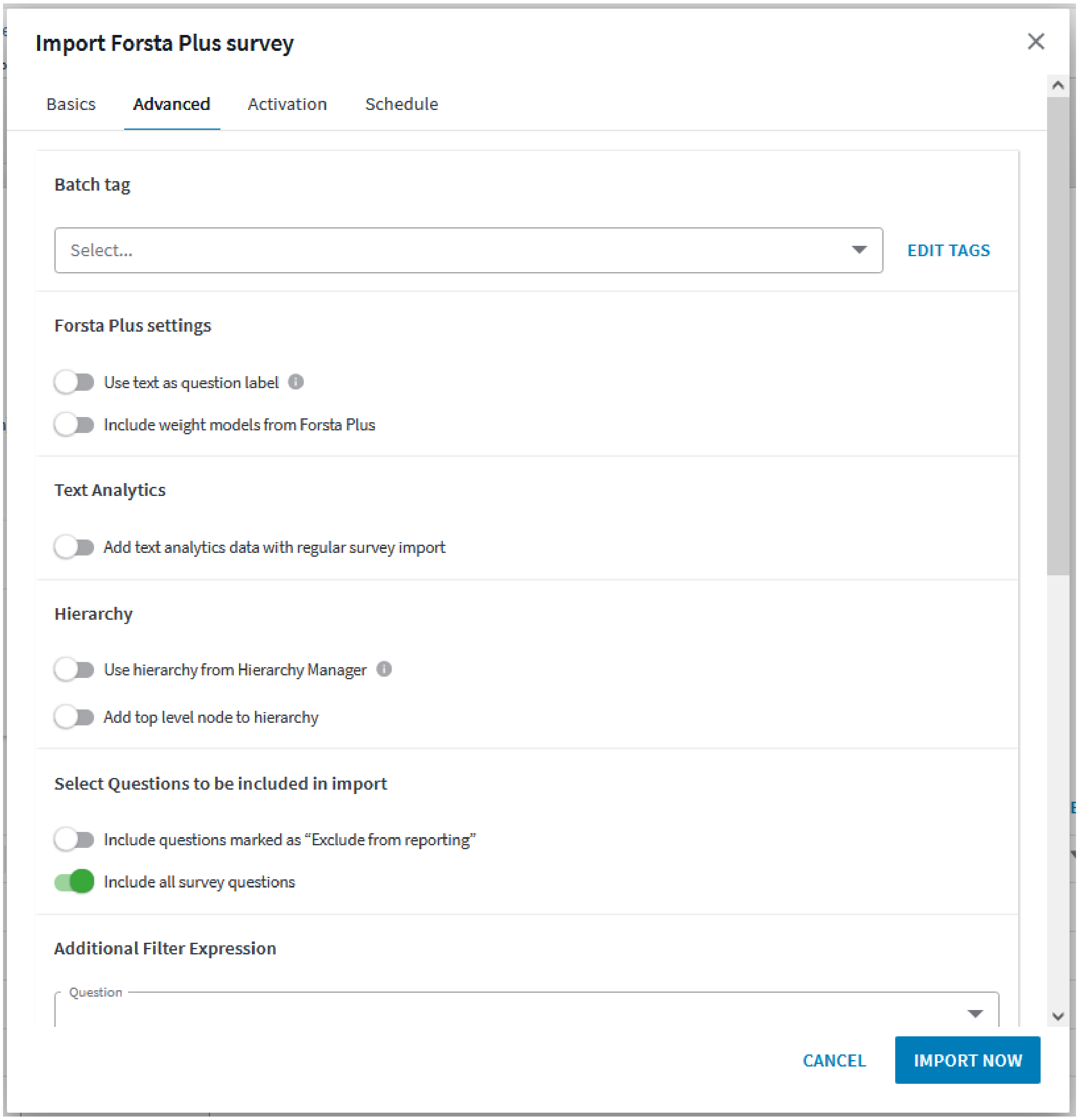
Depending on the time setting selected here, different batch types will be used, and depending on the batch type, different activation options will be used. Read more about it under Activation.

Total – uses “New data set”.

Auto – uses “New data set and updates to existing data sets”

Static – uses “New data set”.

## Advanced


Import Forsta Plus survey
Basics
Advanced
Activation
Schedule
EDIT TAGS
CANCEL
IMPORT NOW

**Batch tag**

Select...

**Forsta Plus settings**

○ Use text as question label

○ Include weight models from Forsta Plus

**Text Analytics**

○ Add text analytics data with regular survey import

**Hierarchy**

○ Use hierarchy from Hierarchy Manager

○ Add top level node to hierarchy

**Select Questions to be included in import**

○ Include questions marked as "Exclude from reporting"

● Include all survey questions

**Additional Filter Expression**

Question

### *Batch tag*

Batch tags are as before and available on all types of imports. These tags can help with which batches to activate, deactivate and just to be able to search through all different batches in a project. It is important to use tags if more than one Forsta Plus surveys is to be reported in the same Forsta Visualizations project, to be able to use Time period "Auto" correctly, each survey should have a unique tag. To create tags, click "Edit tag", enter the new tag name, and save. Once saved it can be used in for all types of imports and batches.

## Forsta Plus settings

### *Use text as question label*

In Survey Designer two different question texts can be used. The title is often shorter, and not shown to the person answering the survey, but is in most cases better suited for reporting. This is used by default when importing data to Forsta Visualizations. If the title is missing on a question the label will be based on the text. If the reporting shoule be using the question text as the label, this checkbox must be enabled.

For questions using "prompts", the labels for these are a combination of the title/text and the prompt. Title + Prompt. If the selected option is missing for a question using prompts, only the prompt will be used as question label.

### *Text Analytics*

When importing text analytics data stored in Smart Hub, there are some rules to be aware of. Time period will always be Total, meaning that all respondents will be imported every time the import task is executed, and no filter options, see further down, will be available within the import.

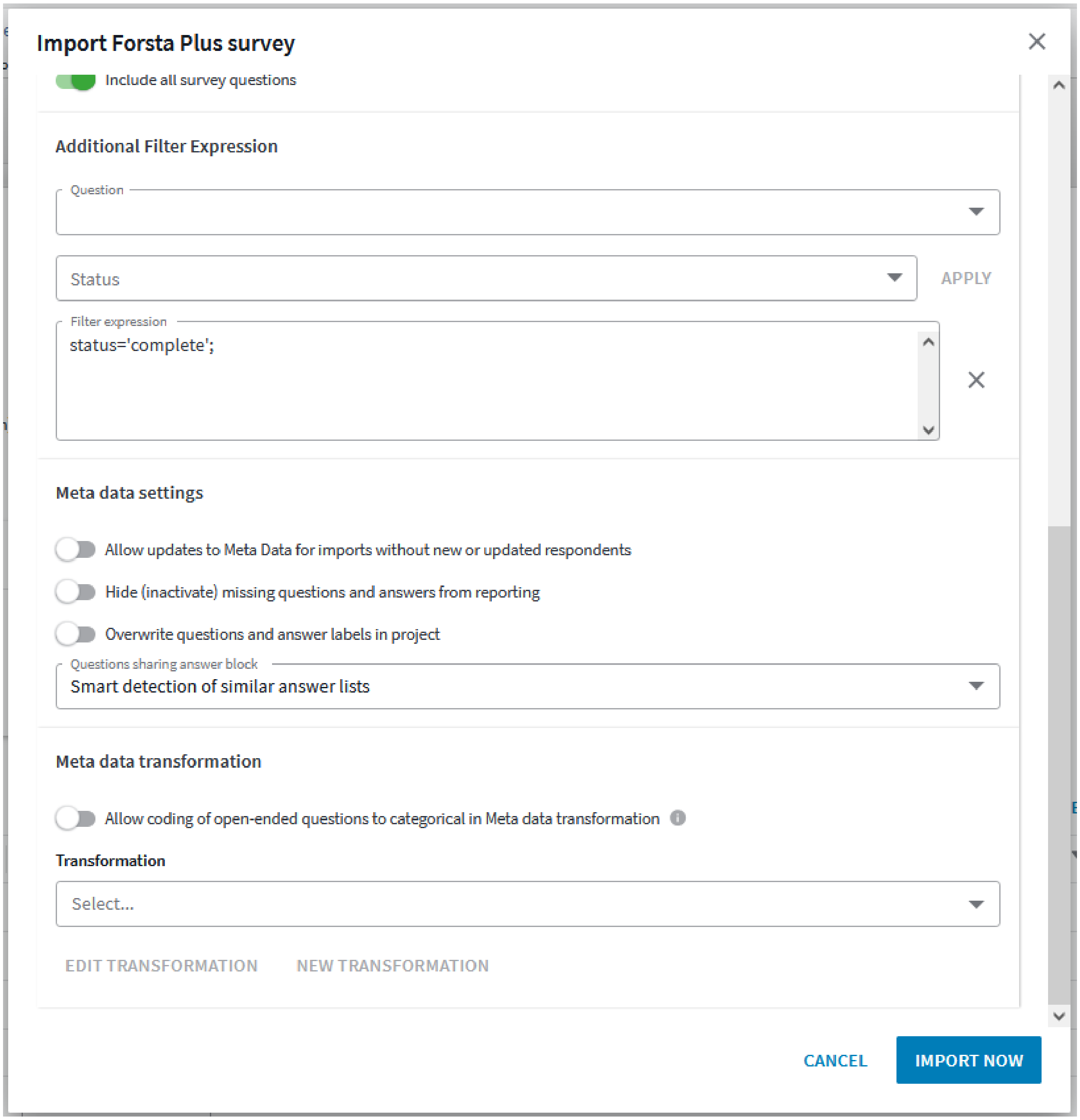
When importing Text analytics data, the specific Hub and Workflow the data is stored in needs to be specified.

### *Hierarchy*

To import hierarchy data from Hierarchy Management within Forsta Plus, enable "Use hierarchy from Hierarchy Manager", add Hierarchy ID (name of the "Table lookup/Hierarchy" question within the survey). It's also possible to enable "Add top level node to hierarchy". This is typically used to create different branches in the Hierarchy filter, like waves or years. Add the name of the top node for the import, and if the name doesn't already exist as a "top node" a new branch will be created. If it already exists, the data will be merged into the existing branch.

### *Select questions to be included in import*

If questions should not be reported on, these can be excluded from the import to Forsta Visualization. By default, questions marked with "Exclude from reporting" within Forsta Plus are also excluded in the import to Forsta Visualizations. All other questions are imported to Forsta Visualizations. By disabling "Include all survey questions" only the selected questions would be imported to Forsta Visualizations. Open the Question dropdown and select what questions should be imported. Include the questions after selecting them.



Import Forsta Plus survey

● Include all survey questions

Additional Filter Expression

Question:

Status

Filter expression: status='complete';

Meta data settings

○ Allow updates to Meta Data for imports without new or updated respondents

○ Hide (inactivate) missing questions and answers from reporting

○ Overwrite questions and answer labels in project

Questions sharing answer block: Smart detection of similar answer lists

Meta data transformation

○ Allow coding of open-ended questions to categorical in Meta data transformation

Transformation: Select...

*Additional Filter Expression*

By default, only respondents with answer “Complete” in “Status” are imported. Additional filters can be added to the import by selecting the question and answer to filter on and include it to the filter expression. The default selection for the question “Status” can be changed in the same way.

### Meta data settings

*Update meta data even if there are no new respondents to import*

If changes have been made to the survey structure within Forsta Plus, but there are no new respondents since last time of import, this option can be used to always make sure that the meta data will be updated. This means that new answer alternatives, changes to question texts or other types of changes to the survey structure is updated. This update creates no new respondent batches.

*Hide (inactivate) missing questions and answers from reporting*

Questions and answers that are removed from the survey and should not be reported on can be automatically hidden from reporting. This is done by inactivating the question/answer. With this option the inactivation is done automatically in the import for all questions and answers that exists in the project, but not in the import.

*Overwrite questions and answer labels in project*

Question- and answer labels can be updated within Forsta Visualizations in different ways. If changes have been applied in Forsta Plus and the changes should be applied in the reporting, this option can be used. Please note that all labels in the import will be used within reporting. All manual changes made in Forsta Visualizations earlier will be overwritten.

*Questions sharing answer block*

Within Forsta Visualizations questions can share answer lists/block. An answer block is created the first time a question belonging to it is imported. This setting will decide how the answer blocks are created. To learn more about the Answer block logic, please refer to our knowledge base.

### Meta Data transformation

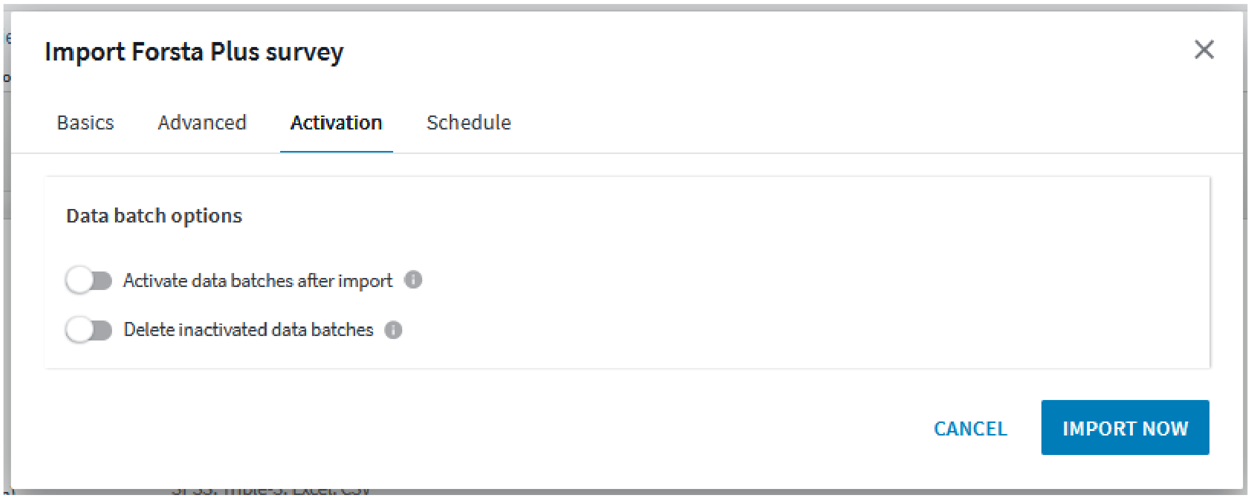
*Allow coding of open-ended questions to categorical in Meta data transformation*

To categorize an open ended or numeric question this option needs to be enabled. To choose what questions should be categorized is selected in the Meta Data Transformation.

*Transformation*

If changes are needed in the structure of the data before it is imported to Forsta Visualization, do this in Meta Data transformation. Open ended and numeric can be changed to categorical, text changes on questions and answers can be done, and mandatory variables can be changed or added. These transformations can be used for many different imports within the same project. Select an existing Transformation from the dropdown, or create a new Transformation, or Edit an already existing one. To learn more about Meta Data transformation, please refer to our knowledge base.

### Activation



**Import Forsta Plus survey**

**Data batch options**

○ Activate data batches after import

○ Delete inactivated data batches

### Data batch options

*Activate data batches after import*

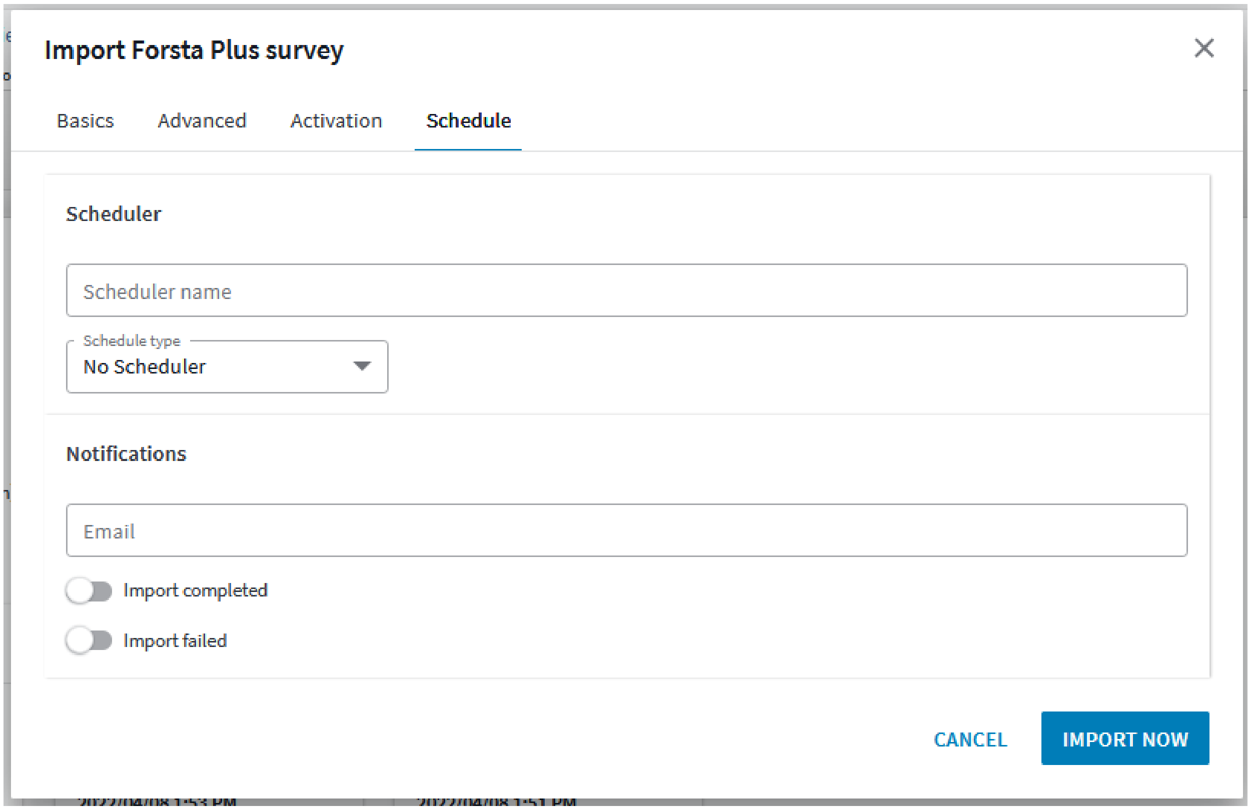
To be able to report on the imported data, the batches must be activated within Forsta Visualizations. This can be done manually, or automatically when importing data from

Forsta Plus. Depending on Time period settings, different activation logics are used. If Time period Total or Static is used, the system will inactivate old data batches and activate the newly imported ones. (If Tags are used, the system will inactivate/activate batches with the same Tag.) If Time period Auto is used, the newly imported data batches will be appended to the already activated data batches.

### *Delete inactivated data batches*

This option will delete all inactivated data batches after activation has been executed. This will not consider Tags but will delete all inactivated files.

### Scheduler



Import Forsta Plus survey

Scheduler

Scheduler name

Schedule type: No Scheduler

Notifications

Email

Import completed

Import failed

### Scheduler name

The name of the scheduler is the name that will be shown on the cards in the main Data page. These names are automatically named after the Survey name. If the same survey is imported to the project with a different import, the name of it will be the survey name and brackets with a number in it.

### Scheduler type

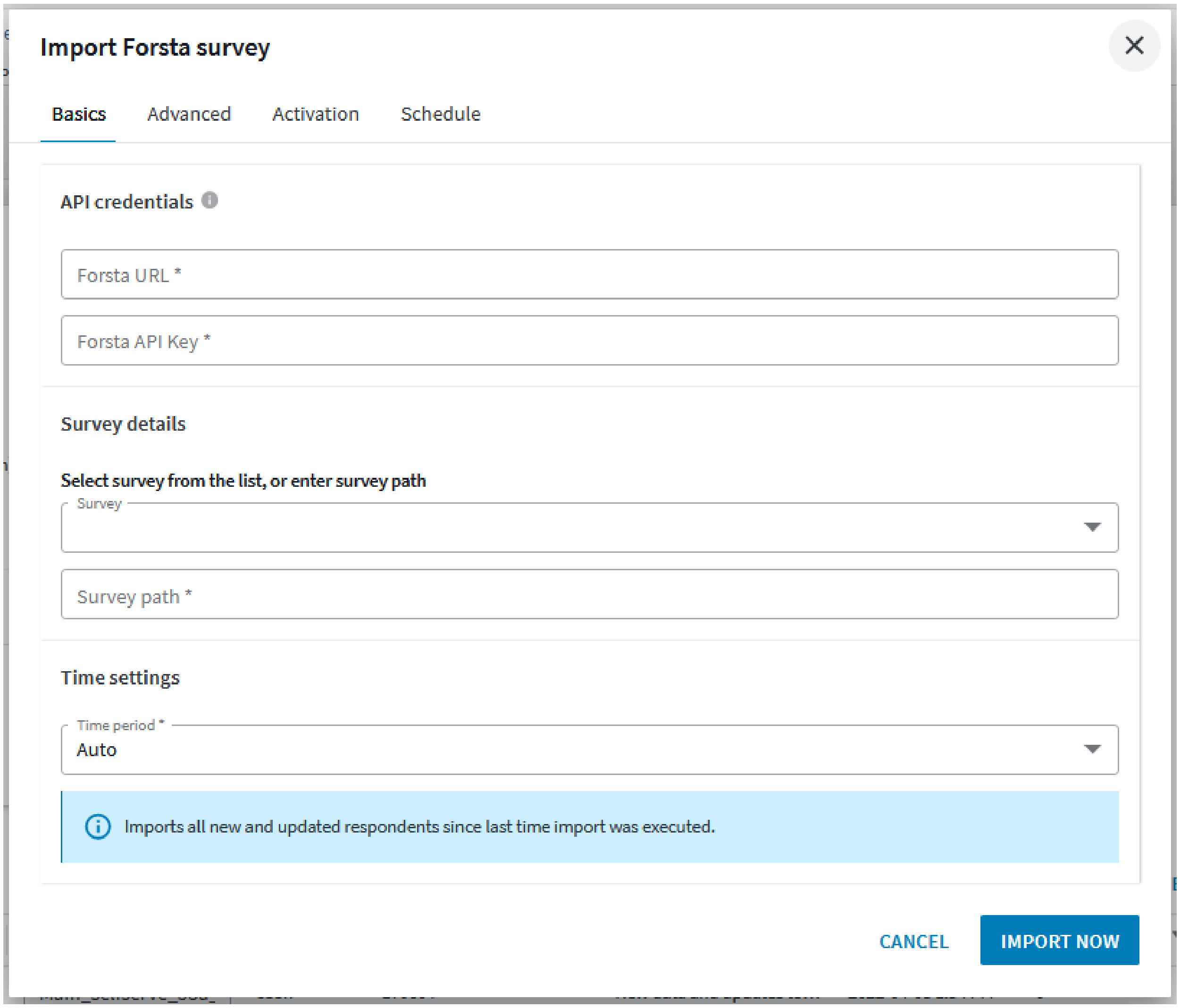
The different types of schedules are the frequency of the imports. Monthly, Weekly, Daily and Hourly. The option that is default is “No Scheduler” and this is the same option as ”On Demand” in the old layout. This means that even if we only import one survey one time, we still create a scheduled task, to be able to save all settings used, and make it easier to import again, with the same settings.

### Notifications

Add what email should get a notification when the import has finished or failed.

### 4.5.1 Forsta – Forsta surveys (Previously Focus Vision - Decipher)

#### Basic


Import Forsta survey
Basics
Advanced
Activation
Schedule
API credentials
Forsta URL *
Forsta API Key *
Survey details
Survey
Survey path *
Time settings
CANCEL
IMPORT NOW

Select survey from the list, or enter survey path

Time period *: Auto

Imports all new and updated respondents since last time import was executed.

#### API Credentials

When importing data from Forsta surveys, API credentials are required. These credentials can be found under profile and API Access in Forsta Surveys.

### Survey Details

Select what survey to connect the project to. Surveys shown in the dropdown list are the surveys the API user has access to.

### Time settings

By default, “Auto” will be used as Time period for the import task. This means that in the first import, all data will be imported. In the next import through this task, only the new and updated respondents will be imported. Other options here are “Total” – Importing all respondents every time the import task is executed. “Static” – importing all respondents with a respondent date that is between to specified dates.

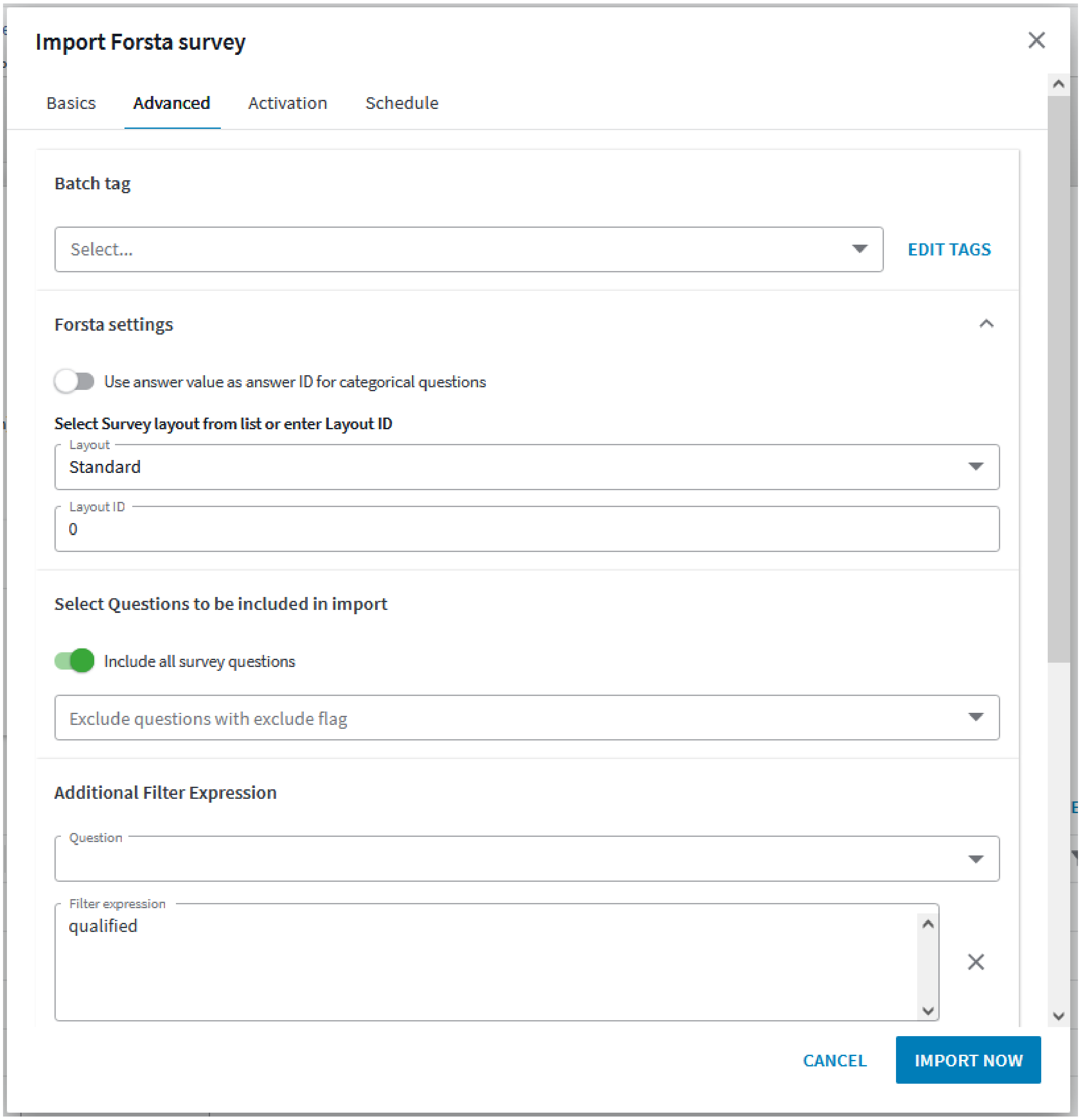
Depending on the time setting selected here, different date variables is used, and different batch types will be used, and depending on the batch type, different activation options will be used. Read more about it under Activation.

Total – uses batch type “New data set”. Uses date, and if empty, start_date.

Auto – uses batch type “New data set and updates to existing data sets”. Uses $date.

Static – uses batch type “New data set”. Uses date, and if empty, start_date.

## Advanced


Basics
Advanced
Activation
Schedule
EDIT TAGS
CANCEL
IMPORT NOW

**Import Forsta survey**

**Batch tag**

Select...

**Forsta settings**

Use answer value as answer ID for categorical questions

**Select Survey layout from list or enter Layout ID**

Layout: Standard

Layout ID: 0

**Select Questions to be included in import**

Include all survey questions

Exclude questions with exclude flag

**Additional Filter Expression**

Question:

Filter expression: qualified

### *Batch tag*

Batch tags are as before and available on all types of imports. These tags can help with what batches to activate, inactivate and just to be able to search thru all different batches in a project. It's important to use tags if more than one Forsta Surveys should be reported in the same Forsta Visualizations project, to be able to use Time period "Auto" in the best way. To create tags, click "Edit tag", enter the new tag name, and save. Once saved it can be used in for all types of imports and batches.

## Forsta settings

### *Use answer value as answer ID for categorical questions*

By default, answer ID's will be created from the labels in Forsta Surveys. Sometimes this will not work due to duplicates of labels as we have to remove the letters leaving only the numbers, in that case select the option to use values, which are always unique within a question

### *Select Survey layout from list or enter Layout ID*

In Forsta Surveys you can create layouts for the exported data. Within the import options, you can optionally select which layout you want to apply.

### *Select questions to be included in import*

If questions should not be reported on, these can be excluded from the import to Forsta Visualization. By default, all questions, including "virtual", "execute only" and "transient" are imported. By disabling "Include all survey questions" only the selected questions will be imported to Forsta Visualizations. Open the Question dropdown and select what questions should be imported. Include the questions after selecting them.

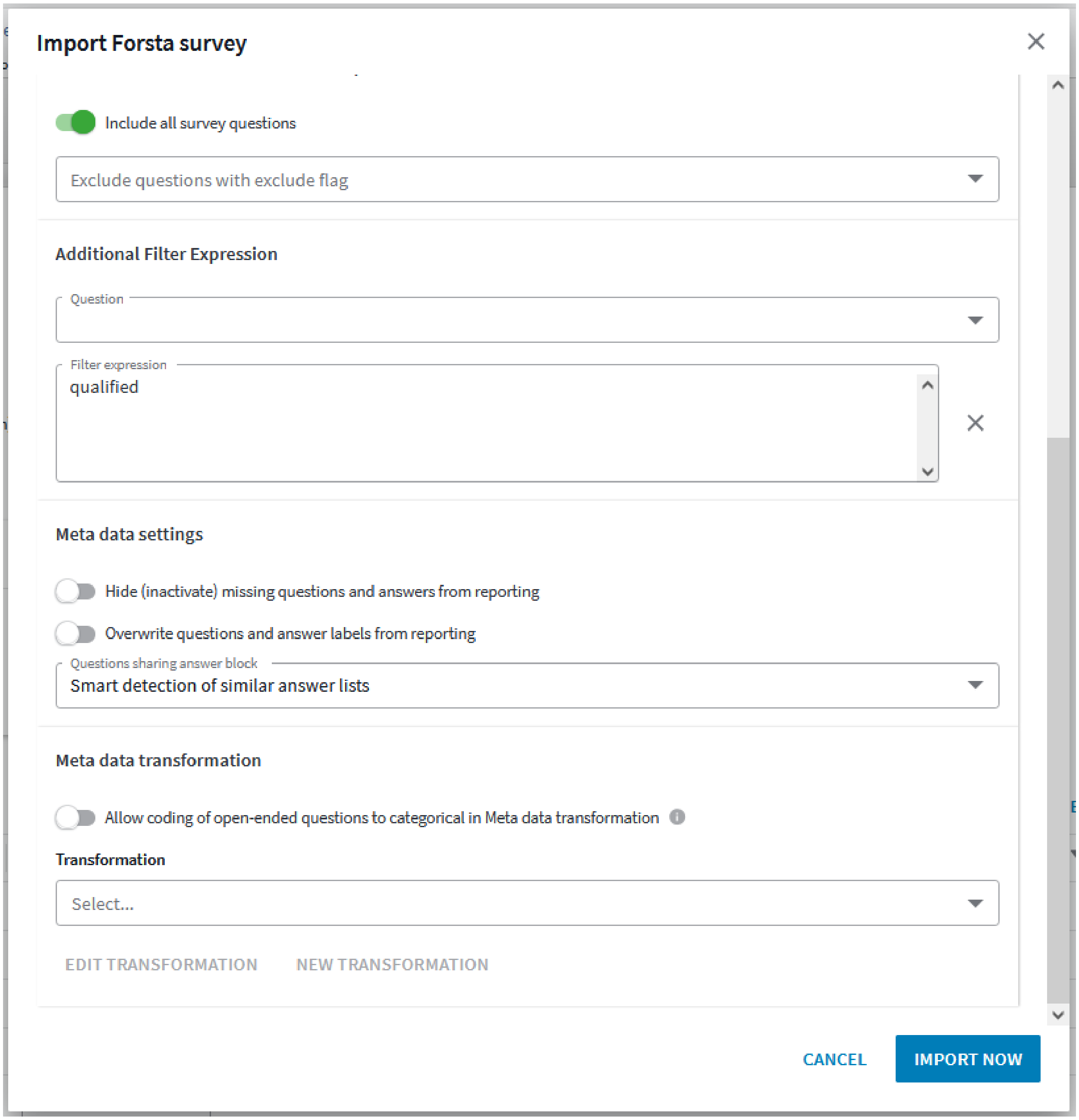
### *Exclude questions with exclude flag*

Apply exclude flag to remove system variables in the import. Supported types are:

- v - this is a “virtual” (computed) variable rather than recorded while taking the survey.
- x - this is an "execute only" question, i.e., it is filled out during the survey but using code (e.g., prefill/autocode/autofill)
- t - this is a "transient" question, which usually indicates something auto-generated by the system (so for example, variables like qtime for interview time, vos / browser for operating system / browser assignment etc.)

### *Additional Filter Expression*

By default, only respondents with answer “qualified” in “Status” are imported. Additional filters can be added to the import by selecting the question and answer to filter on and include it to the filter expression. The default selection for the question “Status” can be changed in the same way.



Import Forsta survey
✕

● Include all survey questions

Exclude questions with exclude flag

**Additional Filter Expression**

Question:

Filter expression: qualified

**Meta data settings**

○ Hide (inactivate) missing questions and answers from reporting

○ Overwrite questions and answer labels from reporting

Questions sharing answer block: Smart detection of similar answer lists

**Meta data transformation**

○ Allow coding of open-ended questions to categorical in Meta data transformation

Transformation: Select...

EDIT TRANSFORMATION
NEW TRANSFORMATION
CANCEL
IMPORT NOW

## Meta data settings

### *Hide (inactivate) missing questions and answers from reporting*

Questions and answers that are removed from the survey and should not be reported on can be automatically hidden from reporting. This is done by inactivating the question/answer. With this option the inactivation is done automatically in the import for all questions and answers that exists in the project, but not in the import.

### *Overwrite questions and answer labels in project*

Question- and answer labels can be updated within Forsta Visualizations in various ways. If changes have been made in Forsta Surveys and the changes should be applied in the reporting, this option should be used. Please note that all labels in the import will be used within reporting. All manual changes done in Forsta Visualizations earlier will be overwritten.

### *Questions sharing answer block*

Within Forsta Visualizations questions can share answer lists/block. An answer block is created the first time a question belonging to it is imported. This setting will decide how the answer blocks are created. To learn more about the Answer block logic, please go to our knowledge base.

## Meta Data transformation

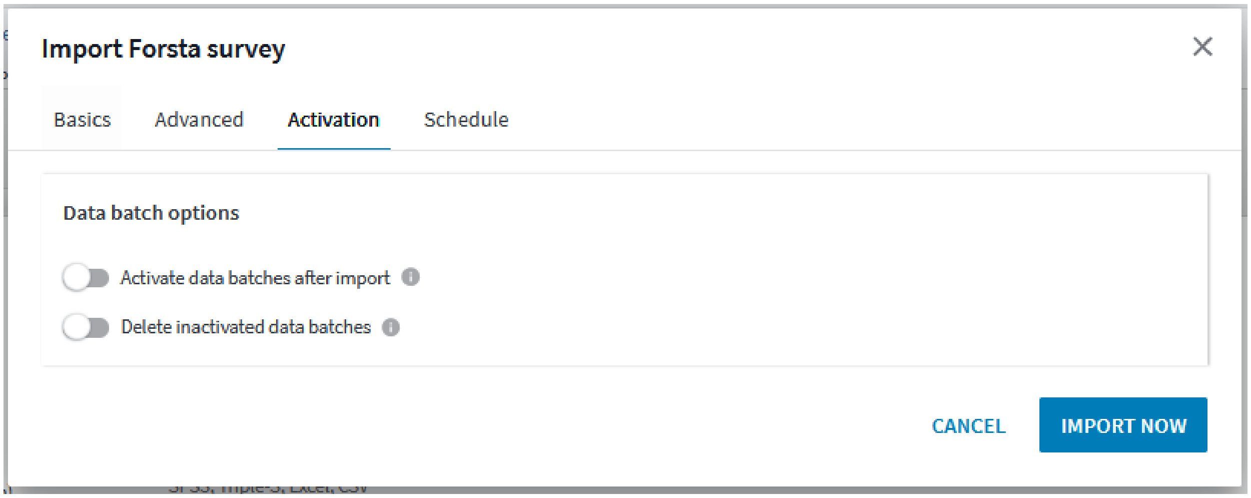
### *Allow coding of open-ended questions to categorical in Meta data transformation*

To categorize an open ended or numeric question this option needs to be enabled. To choose what questions should be categorized is selected in the Meta Data Transformation.

### *Transformation*

If changes need to be made on the structure of the data before it is imported to Forsta Visualizations, this is done in our Meta Data transformation. Open ended and numeric can be changed to categorical, text changes on questions and answers can be applied, and mandatory variables can be changed or added. These transformations can be used for many different imports within the same project. Select an existing Transformation from the dropdown, or create a new Transformation, or Edit an already existing one. To learn more about Meta Data transformation, please refer to our knowledge base.

## Activation


Import Forsta survey
Basics
Advanced
Activation
Schedule
Data batch options
Activate data batches after import
Delete inactivated data batches
CANCEL
IMPORT NOW

### Data batch options

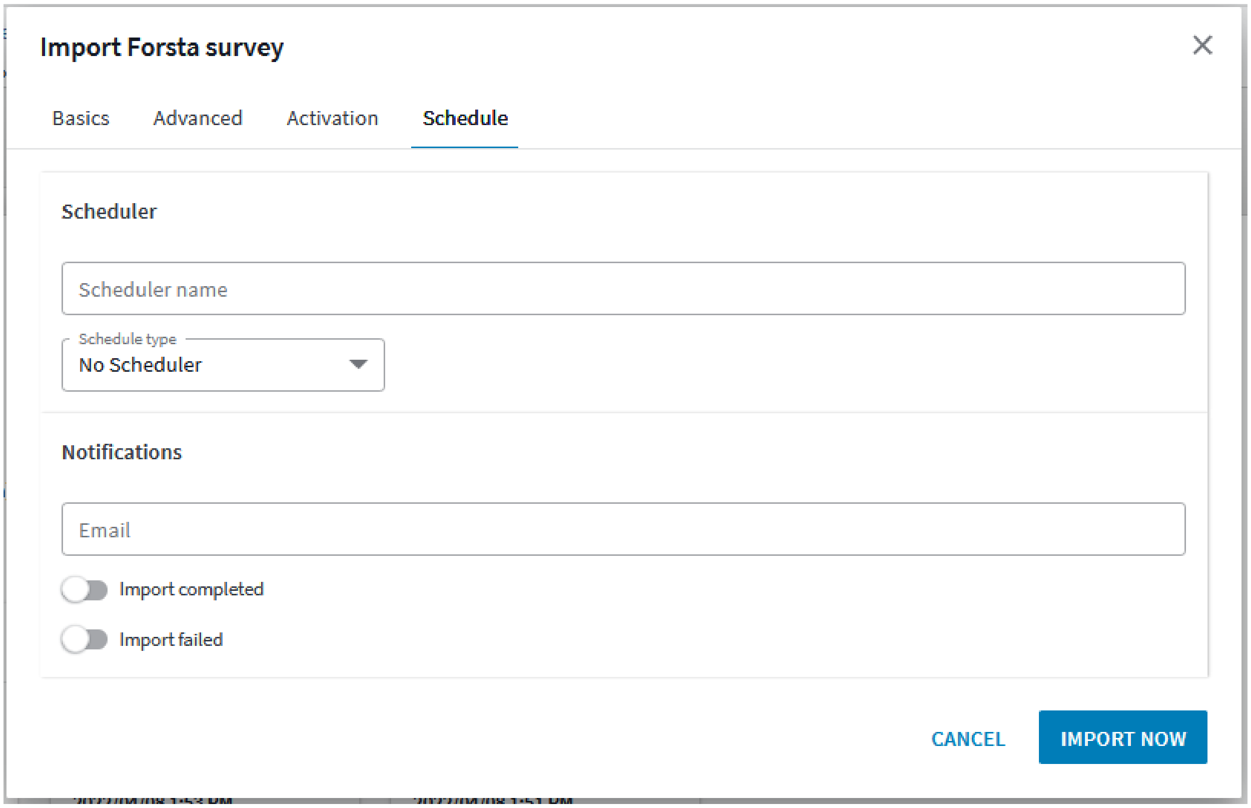
*Activate data batches after import*

To be able to report on the imported data, the batches must be activated within Forsta Visualizations. This can be done manually, or automatically when importing data from Forsta Surveys. Depending on Time period settings, different activation logics are used. If Time period Total or Static is used, the system will inactivate old data batches and activate the newly imported ones. (If Tags are used, the system will inactivate/activate batches with the same Tag.) If Time period Auto is used, the newly imported data batches will be appended to the already activated data batches.

*Delete inactivated data batches*

This option will delete all inactivated data batches after activation has been executed. This will not filter on tags and will delete all inactivated files.

## Scheduler


Import Forsta survey
Basics
Advanced
Activation
Schedule
Scheduler
Scheduler name
Schedule type
No Scheduler
Notifications
Email
Import completed
Import failed
CANCEL
IMPORT NOW

### Scheduler name

The name of the scheduler is the name that will be shown on the cards in the main Data page. These names are automatically copied from the survey name. If the same survey is imported to the project with a different import, the name of it will be the survey name and brackets with a number in it.

### Scheduler type

The different types of the scheduler are the frequency of the imports. Monthly, Weekly, Daily and Hourly. The option that is default is “No Scheduler” and this is the same option as “On Demand” in the old layout. This means that even if we only import one survey one time, we still create a scheduled task, to be able to save all settings used, and make it easier to import again, with the same settings.

### Notifications

Add the email should get a notification when the import has finished or failed.

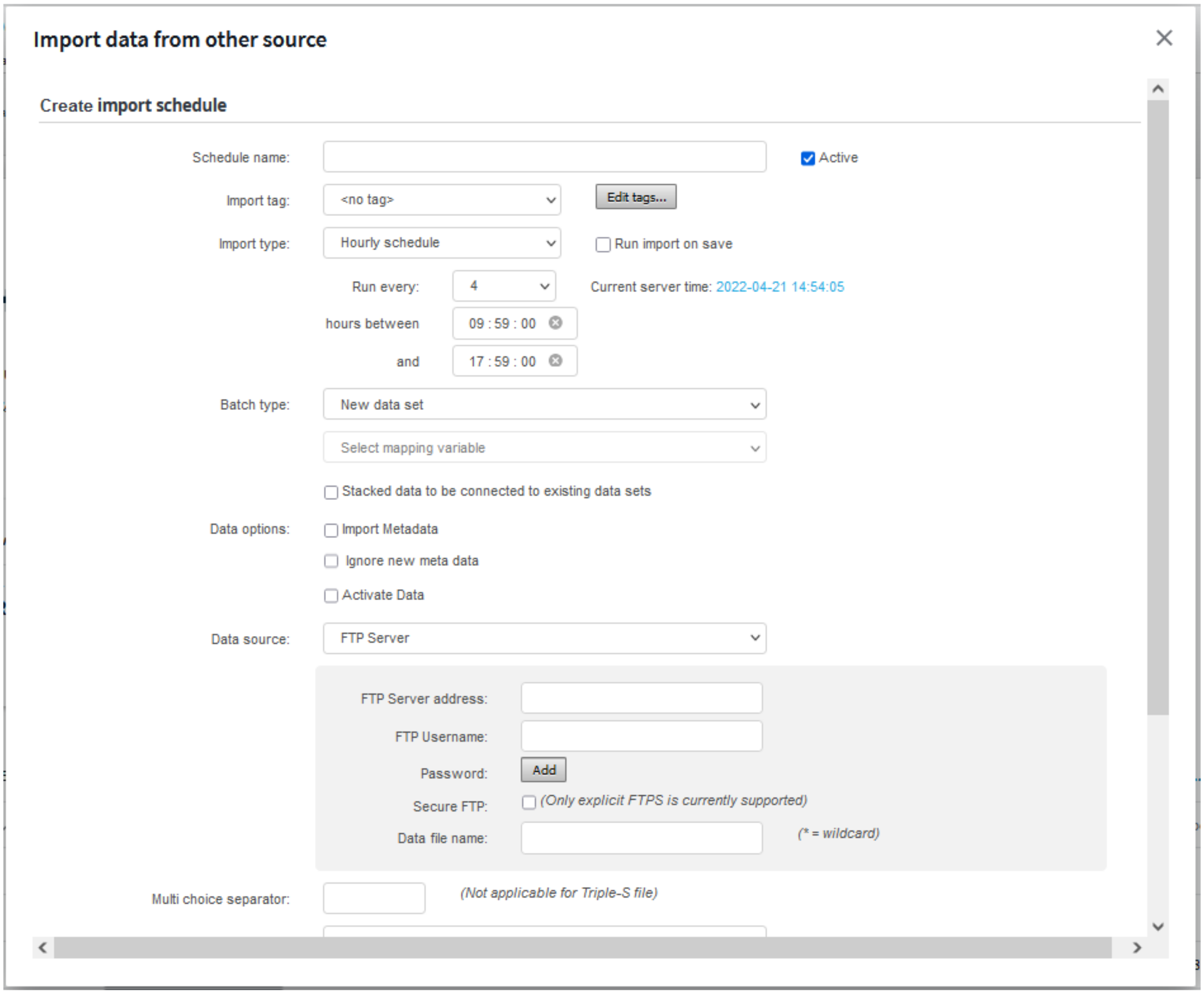
# 5 Data management

## 5.1 Improved start time of scheduled data import jobs

The start time of hourly scheduled import jobs can now be set on a minute level and not just on full and half hour which gives you better control of when data is imported.

By default when creating the task the minutes are set to current time plus 5 minutes.

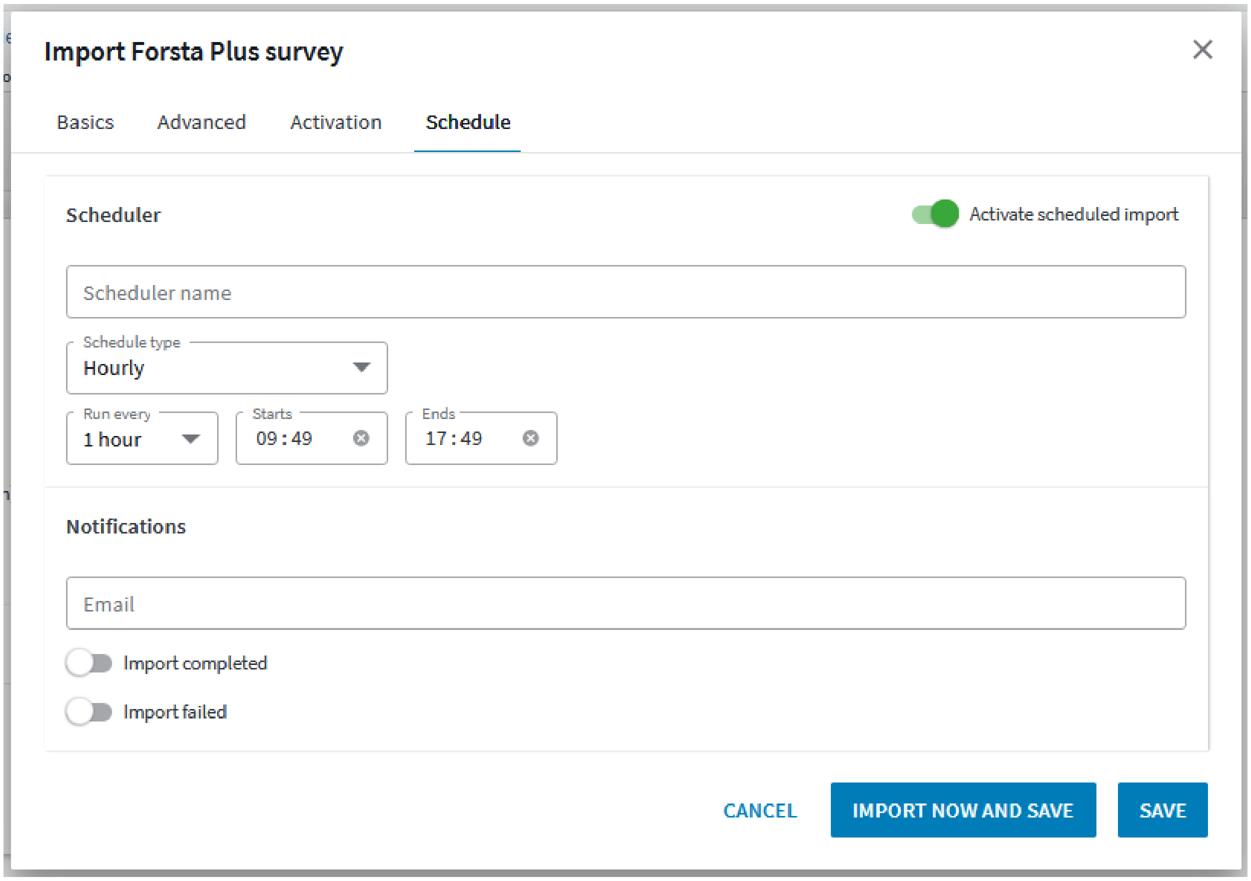
*Example of how this looks in both scheduled import pages.*



**Import data from other source**

**Create import schedule**

Schedule name:
☑ Active
Import tag: <no tag>
Import type: Hourly schedule
☐ Run import on save
Run every: 4
Current server time: 2022-04-21 14:54:05
hours between 09 : 59 : 00
and 17 : 59 : 00
Batch type: New data set
Select mapping variable
☐ Stacked data to be connected to existing data sets
Data options:
☐ Import Metadata
☐ Ignore new meta data
☐ Activate Data
Data source: FTP Server
FTP Server address:
FTP Username:
Password:
Secure FTP: ☐ (Only explicit FTPS is currently supported)
Data file name: (* = wildcard)
Multi choice separator: (Not applicable for Triple-S file)


Basics
Advanced
Activation
Schedule
CANCEL
IMPORT NOW AND SAVE
SAVE

**Import Forsta Plus survey**

**Scheduler**

● Activate scheduled import

Scheduler name

Schedule type: Hourly

Run every: 1 hour

Starts: 09 : 49

Ends: 17 : 49

**Notifications**

Email

○ Import completed

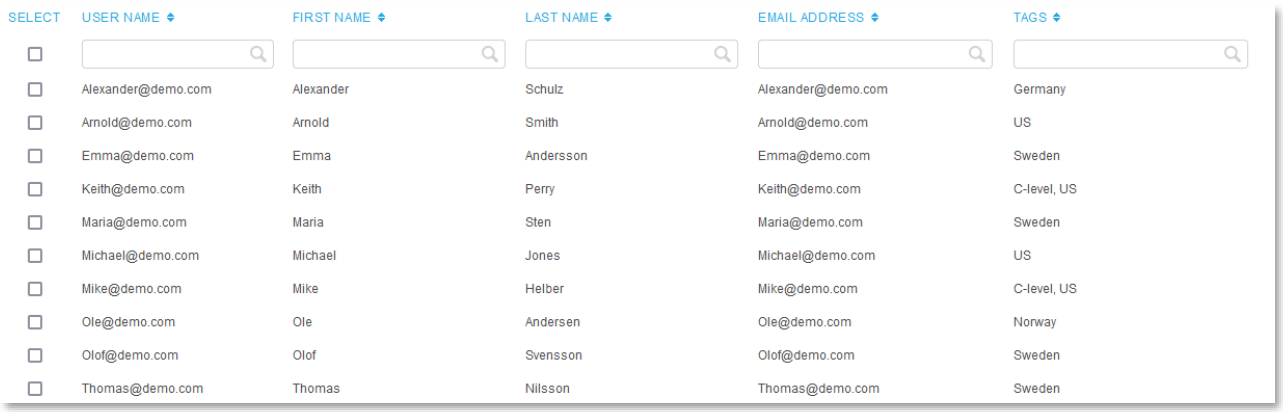
○ Import failed

# 6 Report user management

## 6.1 Report user tagging

Report users can now be tagged for more efficient user administration. As an example the users can be tagged with their country in a global survey which makes it quicker to search for and invite all the users from a specific country.

*Example of tags in most right column.*



| SELECT | USER NAME | FIRST NAME | LAST NAME | EMAIL ADDRESS | TAGS |
|---|---|---|---|---|---|
| ☐ | | | | | |
| ☐ | Alexander@demo.com | Alexander | Schulz | Alexander@demo.com | Germany |
| ☐ | Arnold@demo.com | Arnold | Smith | Arnold@demo.com | US |
| ☐ | Emma@demo.com | Emma | Andersson | Emma@demo.com | Sweden |
| ☐ | Keith@demo.com | Keith | Perry | Keith@demo.com | C-level, US |
| ☐ | Maria@demo.com | Maria | Sten | Maria@demo.com | Sweden |
| ☐ | Michael@demo.com | Michael | Jones | Michael@demo.com | US |
| ☐ | Mike@demo.com | Mike | Helber | Mike@demo.com | C-level, US |
| ☐ | Ole@demo.com | Ole | Andersen | Ole@demo.com | Norway |
| ☐ | Olof@demo.com | Olof | Svensson | Olof@demo.com | Sweden |
| ☐ | Thomas@demo.com | Thomas | Nilsson | Thomas@demo.com | Sweden |

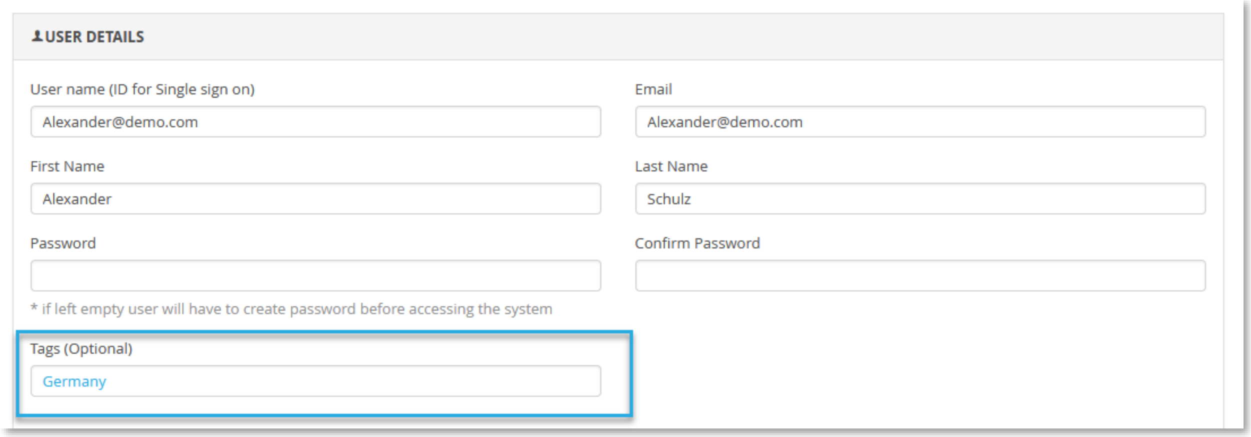
### *6.1.1 Add tags to users*

Tags are added to users via the create/edit report user pages or via the Excel file used for bulk updates.

**Add and edit tags in Report user page**

A field for tagging users are present in the user details section as shown below. It is optional to add tags, a user can have multiple tags.

*New tag field in create and edit Report user view.*



**USER DETAILS**

User name (ID for Single sign on): Alexander@demo.com

Email: Alexander@demo.com

First Name: Alexander

Last Name: Schulz

Password:

Confirm Password:

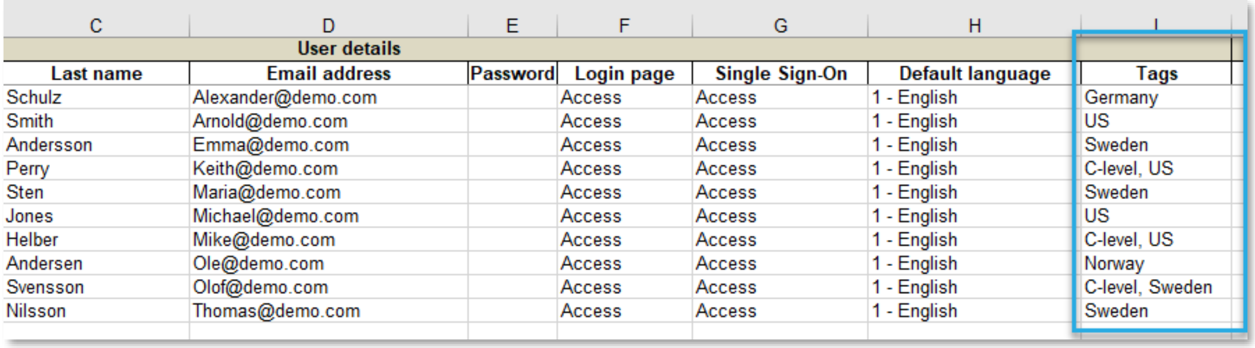
* if left empty user will have to create password before accessing the system

Tags (Optional): Germany

### Add and edit tags via Excel download/upload process

The users can be tagged via the Excel download/upload process. In the image below we see the new tag column in the Excel file for bulk update report users. Tags should be comma separated in case of having multiple tags per user.

*New tag column in Report user Excel file.*

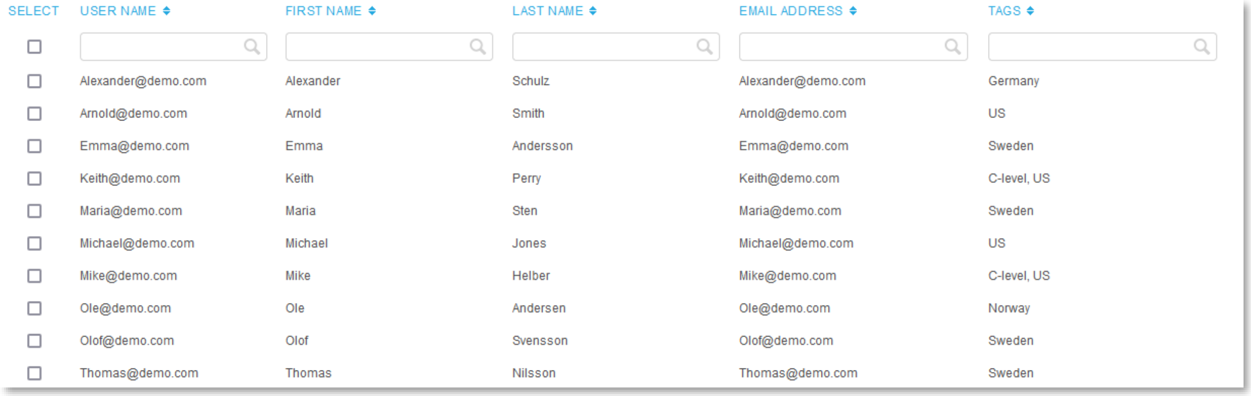


| C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|
| | User details | | | | | |
| Last name | Email address | Password | Login page | Single Sign-On | Default language | Tags |
| Schulz | Alexander@demo.com | | Access | Access | 1 - English | Germany |
| Smith | Arnold@demo.com | | Access | Access | 1 - English | US |
| Andersson | Emma@demo.com | | Access | Access | 1 - English | Sweden |
| Perry | Keith@demo.com | | Access | Access | 1 - English | C-level, US |
| Sten | Maria@demo.com | | Access | Access | 1 - English | Sweden |
| Jones | Michael@demo.com | | Access | Access | 1 - English | US |
| Helber | Mike@demo.com | | Access | Access | 1 - English | C-level, US |
| Andersen | Ole@demo.com | | Access | Access | 1 - English | Norway |
| Svensson | Olof@demo.com | | Access | Access | 1 - English | C-level, Sweden |
| Nilsson | Thomas@demo.com | | Access | Access | 1 - English | Sweden |

### *6.1.2 Administration pages  displaying tags*

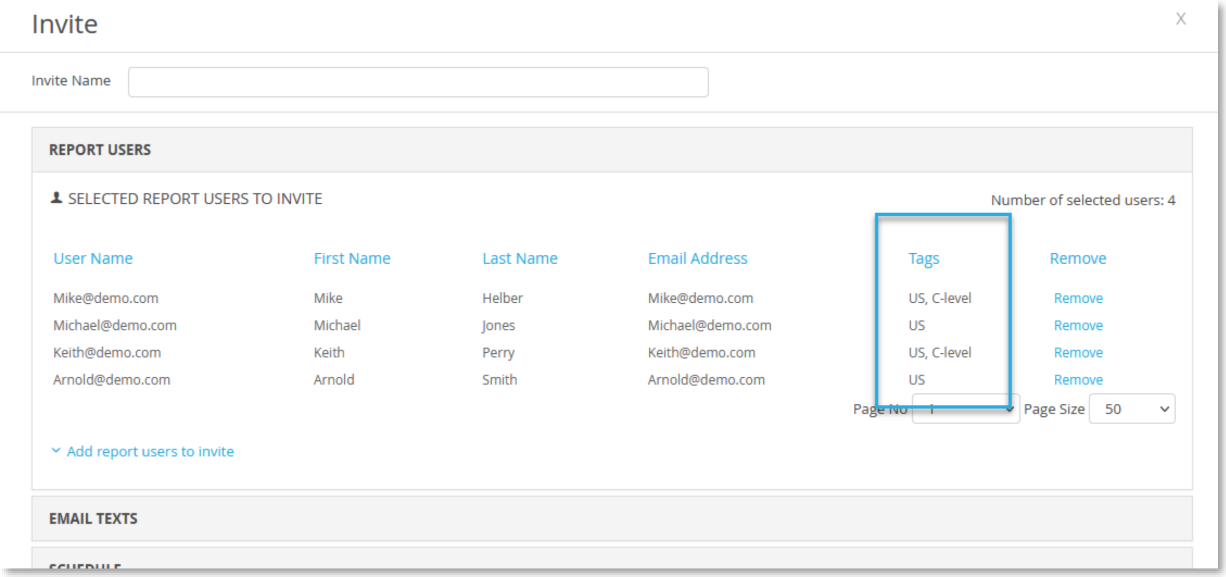
Tags are currently displayed in the following pages:

*Report user list.*



| SELECT | USER NAME | FIRST NAME | LAST NAME | EMAIL ADDRESS | TAGS |
|---|---|---|---|---|---|
| ☐ | | | | | |
| ☐ | Alexander@demo.com | Alexander | Schulz | Alexander@demo.com | Germany |
| ☐ | Arnold@demo.com | Arnold | Smith | Arnold@demo.com | US |
| ☐ | Emma@demo.com | Emma | Andersson | Emma@demo.com | Sweden |
| ☐ | Keith@demo.com | Keith | Perry | Keith@demo.com | C-level, US |
| ☐ | Maria@demo.com | Maria | Sten | Maria@demo.com | Sweden |
| ☐ | Michael@demo.com | Michael | Jones | Michael@demo.com | US |
| ☐ | Mike@demo.com | Mike | Helber | Mike@demo.com | C-level, US |
| ☐ | Ole@demo.com | Ole | Andersen | Ole@demo.com | Norway |
| ☐ | Olof@demo.com | Olof | Svensson | Olof@demo.com | Sweden |
| ☐ | Thomas@demo.com | Thomas | Nilsson | Thomas@demo.com | Sweden |

*Invite report user page.*



Invite

Invite Name

REPORT USERS

SELECTED REPORT USERS TO INVITE

Number of selected users: 4

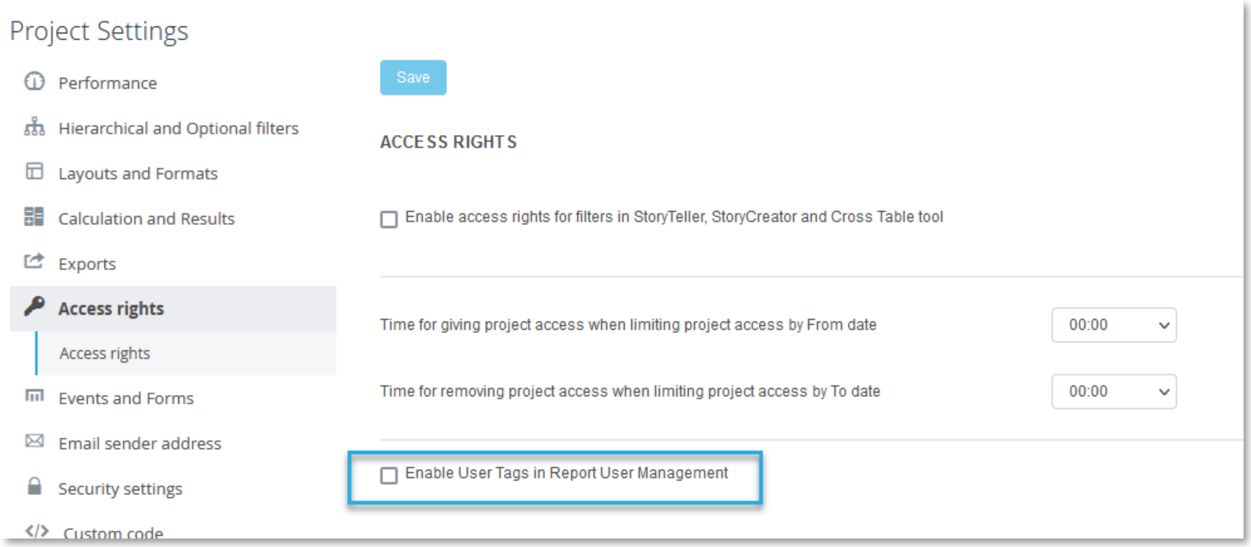
| User Name | First Name | Last Name | Email Address | Tags | Remove |
|---|---|---|---|---|---|
| Mike@demo.com | Mike | Helber | Mike@demo.com | US, C-level | Remove |
| Michael@demo.com | Michael | Jones | Michael@demo.com | US | Remove |
| Keith@demo.com | Keith | Perry | Keith@demo.com | US, C-level | Remove |
| Arnold@demo.com | Arnold | Smith | Arnold@demo.com | US | Remove |

Page No 1 Page Size 50

### *6.1.3 Tags in "Report user management" report*

The tags are by default not shown in the "Report user management" report, which can be accessed by report users, as tags are typically used for administration purposes. To show the tag functionality in the Report user management report go to Project settings page/Access right tab and enable the option shown in the image below.

*Setting to enable tags in Report user Managment report.*


Project Settings
Performance
Hierarchical and Optional filters
Layouts and Formats
Calculation and Results
Exports
Access rights
Access rights
Events and Forms
Email sender address
Security settings
Custom code
Save

ACCESS RIGHTS

☐ Enable access rights for filters in StoryTeller, StoryCreator and Cross Table tool

Time for giving project access when limiting project access by From date: 00:00

Time for removing project access when limiting project access by To date: 00:00

☐ Enable User Tags in Report User Management