

Dapresy Pro 2018 May Release



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1 - Introduction

This document describes new and improved features in the Dapresy Pro 2018 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

2 - Overview

The Dapresy Pro 2018 May update contains many great improvements, which you can read about in this summary list.

Selected highlights of improvements are:

- The enhancements in the Weighting module, R.I.M weighting is now supported!
- The new My Stories module which allows users to create their own report decks.
- The ability to import stacked data which makes it easier and more efficient to manage brand trackers.

Summary of new and updated features:

My stories – a new module

- The My Stories tool allows end users to create their own report decks based on any slide and filter combination in the Storyteller reports. My Stories is a personal report library that is automatically updated each time new data is added. For example, with My Stories a product manager can build an “Executive Summary” deck to present online during a meeting, or download to PPT for email distribution.

Weighting data

- The data weighting module now supports R.I.M weighing (**R**andom **I**terative **M**ethod). The R.I.M. weighting logic allows for the application to weight on multiple variables in the data so that after a predefined maximum number of loops it matches the target value of all of selected variables.
- Improved support to handle weight calculations when actual distribution is zero respondents
- New ability to include filters when creating weight variables which is useful if, for example, different countries need different target distributions.
- Improved interface for creating weight variables.

Stacked data support

- Stacked data can now be imported to Dapresy Pro which makes it easier to especially handle brand tracker questionnaires where the same question, like brand statements or campaign follow up questions, are present multiple times which is a common case when the respondent evaluates multiple brands or different campaigns

Data cleaning and recoding

- New ability to include filters based on Open ended variables such as email addresses etc. which makes it easier to clean and recode data for specific persons which is relevant with the new GDPR anonymization regulations.
- New ability to recode data permanently, this in combination with for example the ability to recode data automatically after a certain period of time makes it easy to permanently remove personal information from the data which is a requirement for the data minimization and data retention GDPR policies.
- New ability to delete respondents to meet the GDPR right to be forgotten rules.

Compute and Input variables

- New ability to use floating time periods in expression when computing categorical variables like, for example, “Last 2 months”. The update makes it easier and more efficient to make special comparisons like “Latest month” compared to “Same month last year” without having to do any manual updates when new data is loaded in a tracker.
- Improved logic when computing numeric variables based on dates, the update is used in client follow-up processes as it makes it easier to get data for the number of days an alert has been in a certain step (like New, In progress, Closed etc.)

Events

- New ability to use multiple filters in Events which makes setup more efficient in, for example, the case of having the need to filter the alert send outs by both geographical location and different touchpoints like Sales and Service.

Form report

- New support for using Respondent data tables in Forms makes the setup of a Form faster and easier to get correctly aligned layout.
- New support for viewing and analyzing the “customer history” in a Form when the same person/client participated in the survey multiple times. With this new function it is easier to view and analyze the history of the person/client before making any follow-up actions.

Respondent Data tables (Storyteller and Form)

- New padding settings, this makes it easier to create an airy and clean layout

- New ability to display the Factor average instead of the answer text/answer id when using categorical variables in the Respondent data table, this is useful in case of for example having rescaled a 1-5 point scale to 0-100 point scale by using the factor average.

Storyteller charts and tables

- New hierarchical filter sorting option, sort by branch or by level, which is useful when multiple units from different levels are selected to get the desired sorting in charts and tables

Cross table tool

- New ability for the Administrator users to remove sharing of favorite tables that have been shared by Report users, this is useful when people shares irrelevant favorites which do not have an applicable general interest.

Storyteller setup improvements

- New ability to align the text vertically in text boxes (top, middle, bottom)
- Improved copy/paste process, new ability to “Paste here” makes it easier to insert a copied object in correct position from start.

3 My Stories - a new module

The new My Stories module allows users to create their own report decks based on any slide and filter combination in the Storyteller reports. The My Stories is a personal report library that automatically gets updated each time new data is available. For example, with My Stories a product manager can build an “Executive Summary” deck to present online during a meeting, or download to PPT for email distribution.

Chapter 3.1 describes how to work in My Stories and chapter 3.2 how to add a My Stories to the project.

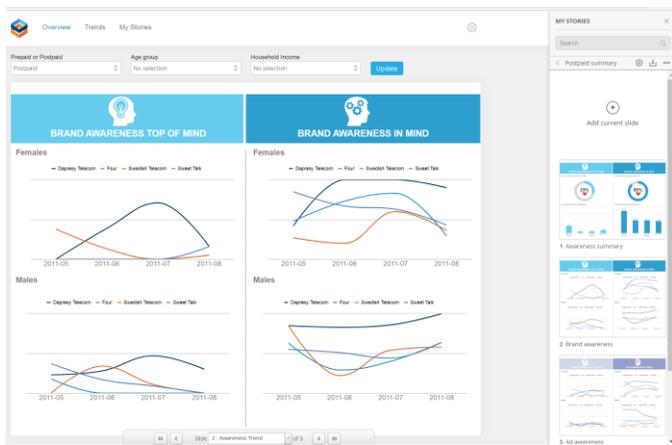
3.1 Work in My Stories

The My Stories consist of two main functions;

- The My Stories panel
- The My Stories report

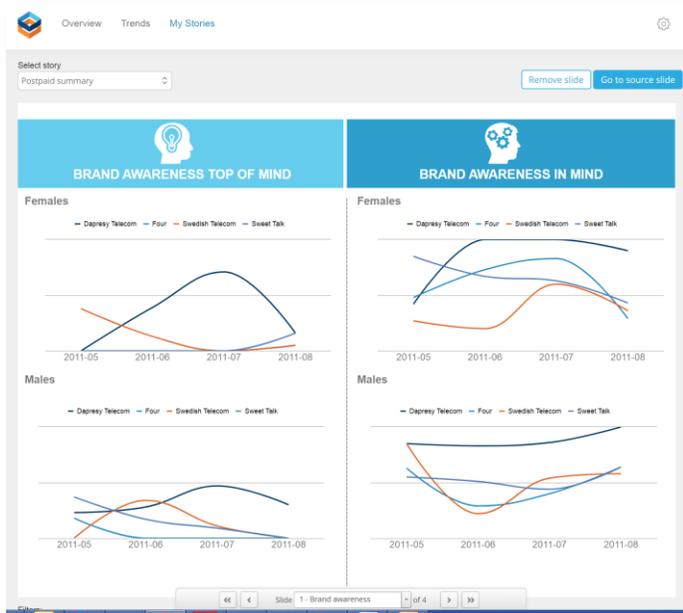
The **My Stories panel** is shown in the Storyteller reports. The purpose of the My Stories panel is to create and maintain the Stories. The image below shows the interface. See chapter 3.1.1 for more information.

The image below shows a Storyteller report and the My Stories panel to the right. The panel is used to save and manage Stories and slides.



The **My Stories Report** is used to view and export already created Stories. The image below shows an example. See chapter 3.1.2 for more information.

The image below shows the My Stories report.



The My stories is treated as a regular report which means that Report Users are granted access by the Project Administrator as with all reports.

Note the following exception: The My Stories cannot be used in Storytellers using the navigation setting “Show all slides in vertical long view” due to the fact that a Story consists of individual slides while a Storyteller with the setting “Show all slides in vertical long view” contains multiple merged slides.

3.1.1 My Stories panel

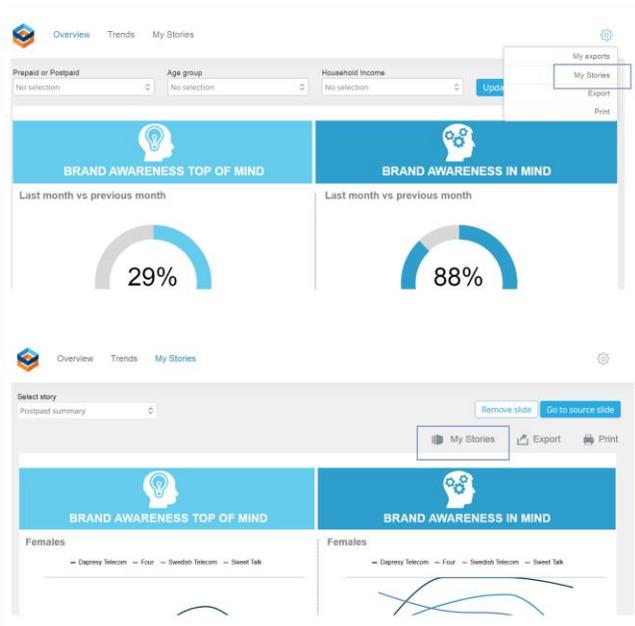
The My Stories panel is located in the Storyteller reports and the purpose of the My Stories panel is to create and edit Stories and Slides.

The image below shows the My Stories panel.



The panel is opened by clicking the My Stories panel link, the style and position of the link is dependent on the Theme used in the project. Below you see two examples of where the link can be positioned, click the link to open the My Stories panel.

The image below shows two examples of the style and position of the My Stories panel link.



Chapter 3.1.1 describes how to manage Stories and chapter 3.1.2 how to manage slides.

3.1.1.1 Managing Stories

The following actions can be done on a Story level, each of the actions are described in detail in the following chapters.

- Create a new story
- Edit the name of an existing Story
- Change the display order of the Stories in case of having multiple Stories
- Delete Stories
- Export a Story to PPT/PDF/Excel
- Update the thumbnail images

3.1.1.1.1 Create a new Story

Follow the steps below to create a new Story:

1. Open the My stories panel
2. Click the New Story button (see image 1 below)
3. Give the new Story a name (see image 2 below)
4. Hit return or click outside the text box
5. → the Story is saved automatically

Image 1, click New Story to create a new story.

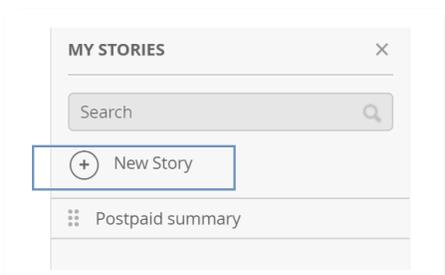
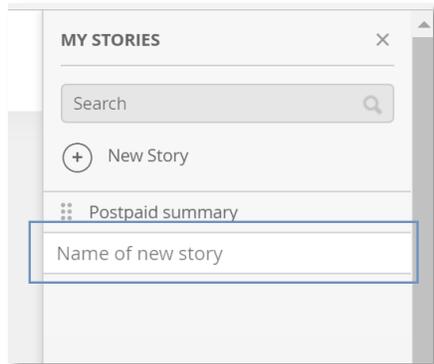


Image 2, enter the name of the new story in the text field. Hit return or click outside the text box to save it.

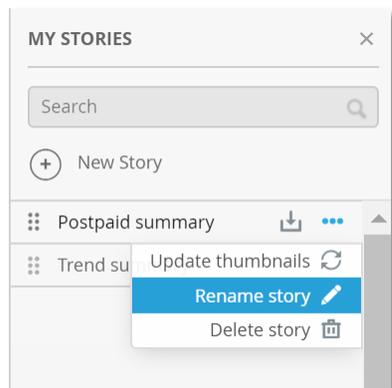


3.1.1.1.2 Edit the name of a Story

Follow the steps below to edit the name of a Story:

1. Hover over the Story menu (see image 1 below)
2. Click Rename Story
3. Enter the new name
4. Hit return or click outside the text field
5. → the new name is saved automatically

Image 1, hover over the menu icon to see the Rename Story option



3.1.1.1.3 Arrange the Stories

In case of having multiple Stories these can be arranged by using drag and drop, follow the steps below:

1. Click on the drag icon on the Story that you want to change position (see image 1 below), the mouse pointer will change to the drag pointer.

2. Drag and drop the Story to the desired position (see image 2 below)
3. → the new sort order is saved automatically

Image 1, the icon below is used for arranging stories by drag and drop.

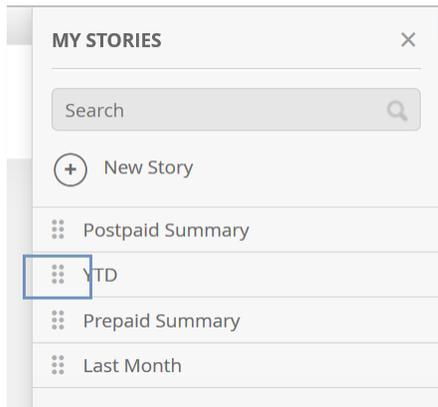
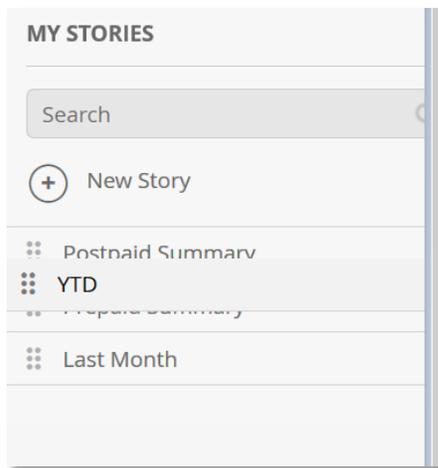


Image 2, arrange the Stories by drag and drop, the changes are saved automatically.

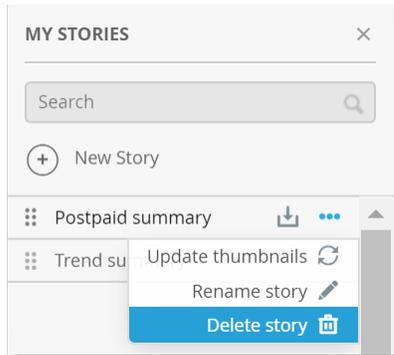


3.1.1.1.4 Delete a Story

Follow the steps below to delete a Story:

1. Hover over the Story menu (see image 1 below)
2. Click Delete Story
3. Confirm the deletion

Image 1



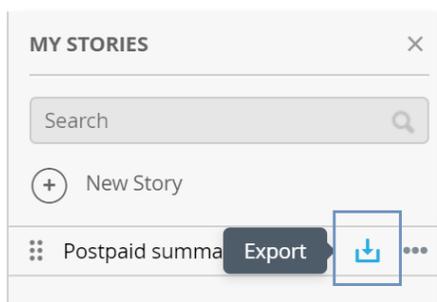
3.1.1.1.5 Export a Story to PPT, PDF, Excel

Follow the steps below to Export a Story to PPT, PDF and or Excel*:

1. Click the Export button (see image 1 below)
2. Select the desired export format in the Export panel and start the file generation
3. Download the report

*Which formats available depend on the setup by the Administrator, see chapter 4.2 for details.

Image 1



3.1.1.1.6 Update thumbnails

The thumbnails shown in the My stories panel and in the information view (see chapter 3.1.2.5) are created when a slide is saved to My stories (see chapter 3.1.2.1). These thumbnails are not updated when new data is loaded in the project or when any change is made in the source slide by the

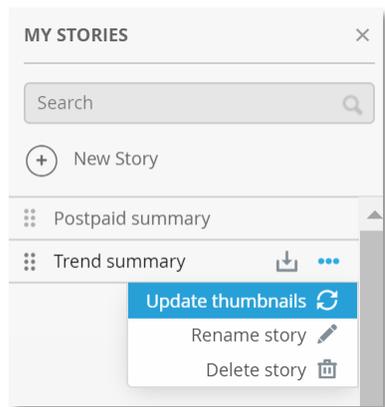
administrator as the thumbnails are static images. The purpose of these thumbnails are to give a general overview of the Story, to view the actual result go to the My stories report (see chapter 3.2).

The thumbnails can be updated, so that new ones are generated by using the Update thumbnail function.

Follow the steps below to update the thumbnails:

1. Hover over the Story menu (see image 1 below)
2. Click Update thumbnails
3. All the thumbnails will now be regenerated

Image 1



Note: You can continue to work while the thumbnails are being generated, you do not need to wait for it to be completed. Navigating away from the current page or closing the browser will have no effect on the thumbnail generation.

3.1.1.2 Managing slides

The user can do the following actions on a slide level, each of them is described in detail in the next chapters.

- Save a Storyteller slide to a Story
- Rename an existing slide
- Arrange slides
- Remove a slide
- View info about the slide
- Go to source slide

3.1.1.2.1 Save a slide to a Story

Follow the steps below to save a Storyteller slide to a Story:

1. Select the Storyteller report, slide and filter combination to be saved to a Story
2. Select the Story which the slide will be saved into
3. Click any of the Add current slide buttons (see image 1 below)
 - If button 1 is used the new slide is placed first
 - If button 2 is used the new slide is placed last
 - If button 3 is used the slide is positioned after the currently selected slide, this slide is shown with a thicker border, if no slide is selected the slide is positioned last
4. Give the slide a name
5. Click outside the text box
6. → the slide is now saved automatically

Note: As soon as you click outside the text box the slide becomes saved and the system starts to generate a thumbnail image which might take a few seconds. You can continue to work while the thumbnail is being generated, you do not need to wait for it to be completed. Navigating away from the current page or closing the browser will have no effect on the thumbnail generation.

Image 1



Note the following logic:

- The My Stories slide will get updated with new data automatically when new data is imported to the project unless the slide has been saved with an optional filter combination that totally excludes the newly imported data
- If the original slide in the Storyteller reports gets an updated layout (new charts, new text objects, deleted charts etc.) the My stories slide gets updated automatically
- If the original Storyteller slide is deleted the My stories slide gets deleted automatically
- If a My stories slide has optional filters applied that no longer are valid, due to changes in the report setup or the access rights of the user, the saved slide will not show any data. Only slides with valid filter combination in regards to access rights and the report setup will show data.
- If the Storyteller has Optional chart settings applied and the user updates a slide by using the Optional chart settings these settings are not saved to My stories. It is always the original slide with the applied optional filters that are saved to My stories.

3.1.1.2.2 Rename an existing slide

Follow the steps below to rename a slide:

1. Hover over the slide and click Rename slide (see image 1 below)
2. Enter the new name
3. Click outside the text field or press return
4. → the new name is now saved automatically

Image 1



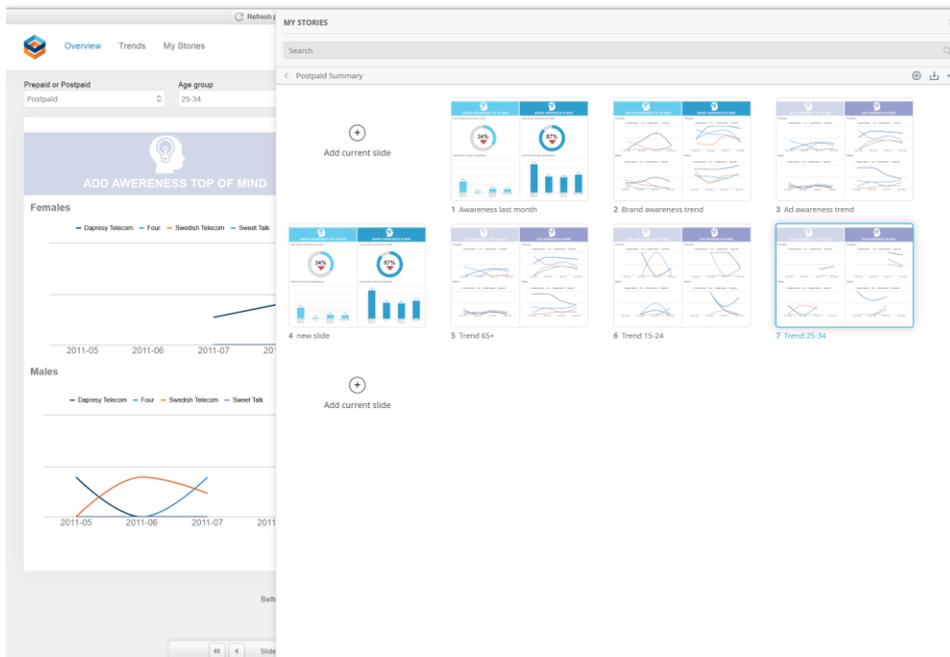
3.1.1.2.3 Arrange slides

When having multiple slides in a Story these can be arranged by drag and drop, follow the steps below:

1. Click on the slide(s) to be arranged (multiple slides can be selected by using holding down the CTRL button.)
2. Drag and drop the slides to the desired position
3. → the changes are saved automatically

Note: In cases of having many slides the slide area can be made larger which makes the overview and slide arrangement easier, see example image below.

The image below shows an example of the layout when the slide area has been made larger which makes it easier to get an overview and arrange the slides.

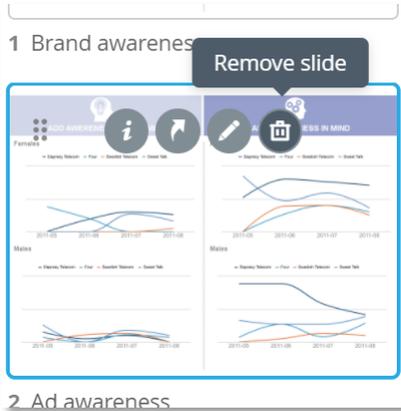


3.1.1.2.4 Remove a slide

Follow the steps below to remove a slide:

1. Select the slide to be removed (multiple slides can be selected by holding down the CTRL key.)
2. Click the Remove slide option (see image 1 below)
3. Confirm the removing of slides
4. → the changes are saved automatically

Image 1



3.1.1.2.5 View info about a saved slide

You are able to view the following info about a saved slide:

- What reports the slide belongs to
- Which optional filters that have been applied to the slide

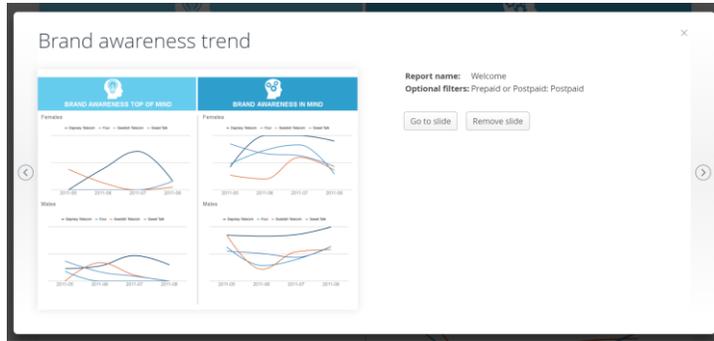
Follow the steps below to view the info

1. Hover over a slide
2. Click the Info button (see image 1 below)
3. The info view appears (see image 2 below)

Image 1



Image 2, the image below shows the info view, you can go between the slides in the same Story by using the arrows in the interface or by hitting the arrows on the keyboard.



Note; the info view shows the generated thumbnail image and so might contain stale data. The latest data is only available in the My Stories report. See chapter 3.1.1.6 and 3.2 for more information.

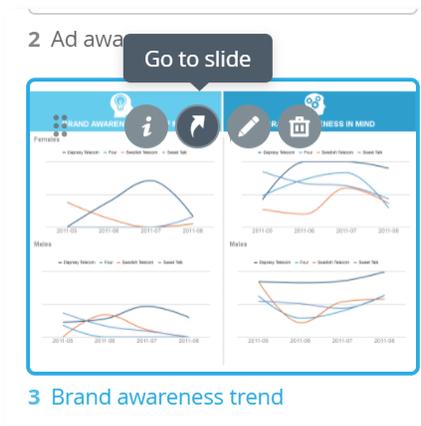
3.1.1.2.6 Go to source slide

From the My Story panel you can, from a saved slide, navigate to the source slides which means that you get redirected to the report and actual slide and the saved optional filters gets applied automatically.

Follow the steps below to go to the source slide

1. Hover over a slide
2. Click the Go to slide button (see image 1 below)
3. You will now go to the original slide in the project.

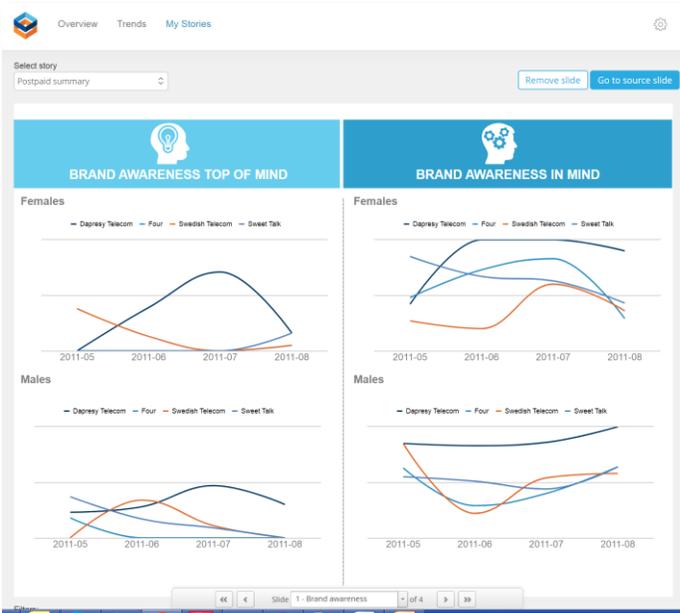
Image 1



3.1.2 My Stories report

The My Stories report is located in the report bar as shown in the image below. The name and position is decided by the Administrator as that is a part of the setup process (see chapter 4.1).

The image below shows the My Stories report.



The user can do the following actions in the My Stories report;

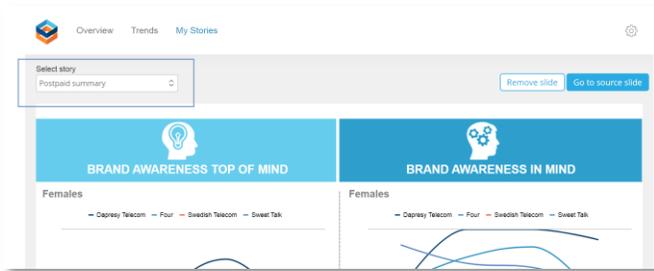
- Select which Story to view
- Export the Story
- Remove a slide
- Arrange the slides
- Go to the original slide

3.1.2.1 Select and view a Story

The dropdown list in the image below contains all the Stories created by the user. To select a story click the desired one.

Use the slide navigation tool in same way as in a Storyteller report to navigate between the different slides in the Story.

The image below highlights the Story selection control in the My Stories report.



Note: if any optional filters are applied to the slide these are shown below the slide, see example image below.



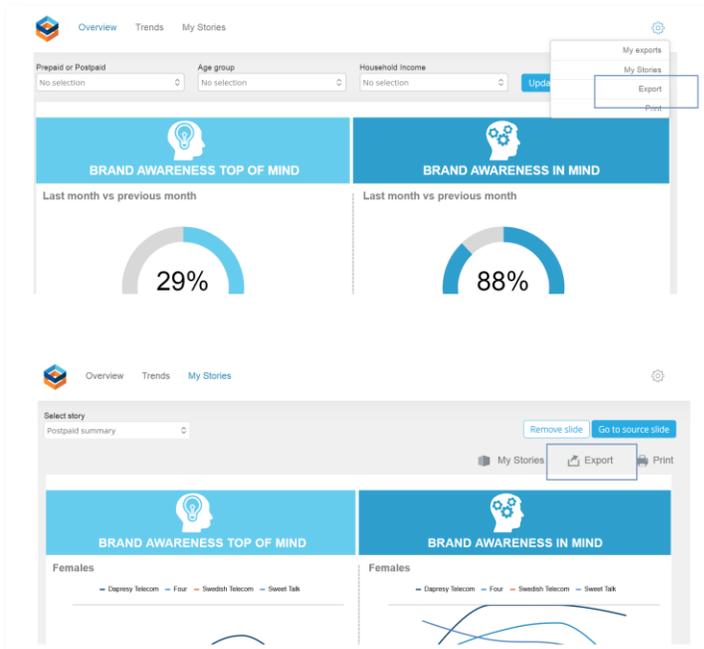
3.1.2.2 Export a Story to PPT/PDF/Excel

Follow the steps below to Export a Story to PPT, PDF and/or Excel*:

1. Click the Export button (see image 1 below)
2. Select the desired export format in the Export panel and start the file generation
3. Download the report

*Which formats available depends on the setup by the Administrator, see chapter 4.2 for details.

Image 1, the images show the export button. The position and style is dependent on the used theme. In the top example the Export button is positioned in the cogwheel menu and in the bottom example just above the slide area

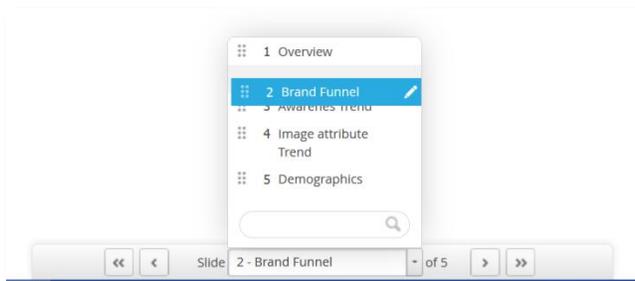


3.1.2.3 Arrange and remove slides

Slides in a Story are removed by clicking the Remove slide button.

The slides can be arranged in the slide navigation tool using drag and drop.

The image below shows how the slides can be arranged by drag and drop in the slide navigation menu.



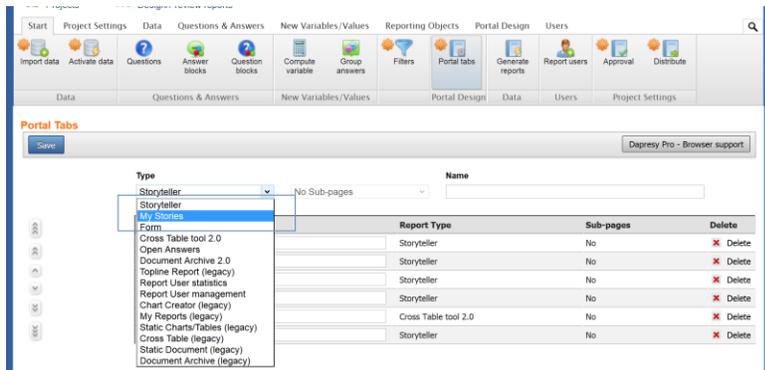
3.2 Setup of My Stories report

The My stories report is not available by default so the report has to be added by Administrator. Except from adding the My Stories report to the portal the export behavior needs to be defined, see more info in chapter 4.1 and 4.2.

3.2.1 Add My Stories to a project

The My stories is added to a project in the Portal Tab page which means that the name and position of the My Stories report is user definable.

The image below shows the new My Stories report option.



Note 1: A project can contain one My Stories report only, as soon as a My Stories report has been added to the project the My Stories option disappears from the report types drop down list.

Note 2: The My Stories report uses the same logic as all other reports in terms of access rights and report distribution so don't forget to set relevant access on the Report Users and don't forget to Distribute the report in the separate distribution screen.

Note 3: if the project used the old legacy My Stories tool that has to be turned off in the Project Settings page before the new My Stories report can be added to your project.

3.2.2 Define available export formats

By default the My Stories report can be exported to PPT but the export options can be updated in the same way as in the Storyteller which means that PPT, PDF, Excel and Print is supported.

Follow the steps below to define the export formats

1. Click the Setup button in the My Stories report to open the settings window (see image 1 below)
2. Select the desired export formats (see image 2 below)
3. Save

Image 1. Click the setup button to open the Export settings window. Note, the button is only shown for Administrators.

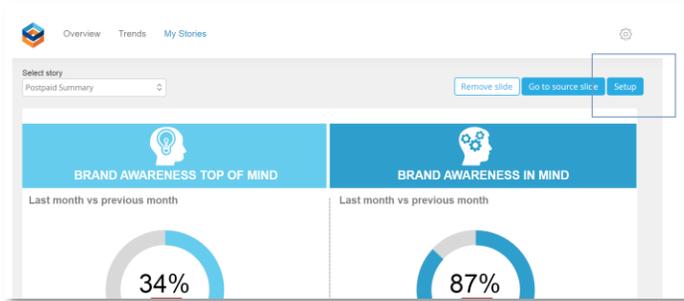
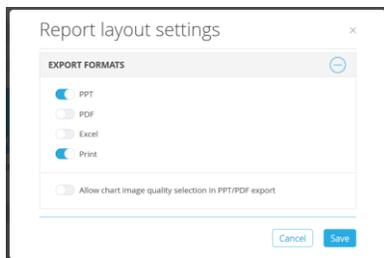


Image 2.



4 Weighting module updates

Chapter 4.1 describes the new R.I.M weighting method and chapter 4.2 described updates when using the old Standard target weighting method.

4.1 R.I.M Weighting

The data weighting module is now supporting R.I.M weighting (**R**andom **I**terative **M**ethod). The R.I.M. weighting logic allows for the application to weight on multiple variables in the data so that after a predefined maximum number of loops (iterations) it matches the target value of all of selected variables.

Below you see a summary of the logic when computing a new weight variable based on the R.I.M method:

- The Target distribution can be set for up to six variables
- “Filters” can be applied to the weight table which makes it possible to apply different target values in different sub groups, as an example the target distributions might be different in different countries in a multi country brand tracker
- The iterative weight process runs until the target distribution is fulfilled for all ingoing variables
- A “Result Tolerance value” can be set. If the Target is set to 20% and the tolerance is set to 0.1 % it means that 19.9% -20.1% will be treated as an achieved target
- A max number of iterations can be set in case the defined targets are not achievable. In practice, most iterative weighting schemes are achieved within 2-20 iterations. The Max number of iterations can be set from 2 to 100
- An option for automatically rescaling the Targets in case of the actual distribution is zero respondents is available. The option will remove the targets for the “zero count options” and rescale the targets for the remaining options in the same variable
- The weighting can be made within all data in the project or within each data set or within a specified interval like Week, Months, Quarter or year
- A project can contain multiple weight variables in case of having the need to for example having booth weekly and monthly weights in a tracker.
- The weight calculations are automatically applied to newly imported data to support an automated process

Here we have an example of the weight table when the R.I.M method is used, as shown the Target distributions are setup individually per variable (Age and Gender in this example) and Country has been used as filter which allows different targets per Country.

		Filter: Country2			
		Sweden		Denmark	
		Current (%)	Target (%)	Current (%)	Target (%)
Age group	15-24	14.47	<input type="text" value="15"/>	11.04	<input type="text" value="14"/>
	25-34	14.26	<input type="text" value="15"/>	16.23	<input type="text" value="16"/>
	35-44	15.53	<input type="text" value="15"/>	20.78	<input type="text" value="20"/>
	45-54	21.06	<input type="text" value="20"/>	24.03	<input type="text" value="20"/>
	55-64	17.45	<input type="text" value="20"/>	11.69	<input type="text" value="15"/>
	65 +	17.23	<input type="text" value="15"/>	16.23	<input type="text" value="15"/>
	Sum (%)	99.99999999999999	<input type="text" value="100"/>	100	<input type="text" value="100"/>
Gender	Man	51.70	<input type="text" value="50"/>	49.35	<input type="text" value="50"/>
	Woman	48.30	<input type="text" value="50"/>	50.65	<input type="text" value="50"/>
	Sum (%)	100	<input type="text" value="100"/>	100	<input type="text" value="100"/>

4.1.1 Setup of a weight variable using the R.I.M weighting method

The weight variables are, as before, created and maintained in the Weight screen located in the Reporting Objects Tab in the administration part. When now creating a Weight variable you can choose which method to use:

- Standard target weighting (the old method)
- R.I.M weighing (the new method)

The image below shows the interface for setting up a weight variable when the R.I.M method is used.

Weight Variable Settings X

Code Name

SETTINGS

Method: R.I.M. weighting | Maximum number of iterations: 20 | Result tolerance (%): 0.1

Weight within: Full period | Target tolerance (%): 0.5 | Automatic rescaling: Rescale Target values during the weight calculation, if respondent count is zero

SELECT VARIABLES

QUESTION CODE QUESTION TEXT

Cons. 1	Brand Consideration - Dapresy Telecom
Cons. 8	Brand Consideration - DonkeyCom
Cons. 10	Brand Consideration - Donut Call
Cons. 6	Brand Consideration - Duty Calls
Cons. 2	Brand Consideration - Four
Cons. 3	Brand Consideration - Swedish Telecom

DEFINE TARGET DISTRIBUTIONS

Rescale Target values if the sum is not equal to 100%

		Current (%)	Target (%)
Age group	18-24	13.62	<input type="text" value="16.666666666666668"/>
	25-34	14.74	<input type="text" value="16.666666666666668"/>
	35-44	16.83	<input type="text" value="16.666666666666668"/>
	45-54	21.79	<input type="text" value="16.666666666666668"/>
	55-64	16.03	<input type="text" value="16.666666666666668"/>
	65 +	16.99	<input type="text" value="16.666666666666668"/>
	Sum (%)	100	<input type="text" value="100.000000000000001"/>
Gender	Man	51.12	<input type="text" value="50"/>
	Woman	48.88	<input type="text" value="50"/>
	Sum (%)	100	<input type="text" value="100"/>

As shown above the interface is divided into three sections:

- Settings
- Select variables
- Define Target Distribution

Read more about these in the next chapters.

4.1.1.1 Settings

The following settings are made in the Setting section:

Code and Name: each weight variable needs a code and name, the code must be unique.

Method: Select which weighting method to be used; Standard target weighting or R.I.M weighting

Maximum number of iterations: Select the max number of iterations, the R.I.M calculations will stop after either the maximum number of iterations or when the defined targets are achieved.

(This options is only available when R.I.M weighting is the selected method)

Result tolerance: The value is used to determine when the targets are achieved during the iterative calculation process. If the Target is set to 20% and the tolerance is set to 0.1 % it means that 19.9% - 20.1% will be treated as an achieved target.

(This options is only available when R.I.M weighting is the selected method)

Weight within: Select what base to use for the weighting, the weights can be made within all data in the project, per imported data batch or within a certain interval like week, month, quarter or year.

Note: If, for example, Year is selected and new data is imported on a monthly level it means that the weight of the already imported respondents will be updated when data for a new month is imported as all respondents belonging to the same year is used as base in the weight calculations.

Target tolerance: The Target tolerance is used to validate so the sum of the defined targets is close to 100%, in case of too big difference you will not be able to save the weight variable until you correct the targets (or update the Target tolerance), see an example below.

In this example the Target tolerance has been set to 0.5% which means that the sum of the targets must be between 99.5% to 100.5%, as the sum in the Age group variable is 101% the sum cell becomes red and you will not be able to save until the targets are corrected.

DEFINE TARGET DISTRIBUTIONS

Rescale Target values if the sum is not equal to 100%

		Current (%)	Target(%)
Age group	15-24	13.62	15
	25-34	14.74	15
	35-44	16.83	16
	45-54	21.79	20
	55-64	16.03	20
	65 +	16.99	15
	Sum (%)	100	101
Gender	Man	51.12	50
	Woman	48.88	50
	Sum (%)	100	100

Rescale Target values during the weight calculation, if respondent count is zero: This option is used to handle edge cases where the respondent count is zero which could be the case in for example a tracker where the data is weighted within each week and the number of interviews are not big enough.

Example:

The defined Targets are as the following:

- Option A: 50%
- Option B: 30%
- Option C: 20%

If the actual respondent count of option B is zero during the weight calculation the Targets for the options A and C will be rescaled automatically during the weight calculation to sum up to 100% to not get a skew base size. The new target will be become:

- Option A: 71.43% ($50/(0.5+0.2)$)
- Option B:
- Option C: 28.57% ($20/(0.5+0.2)$)

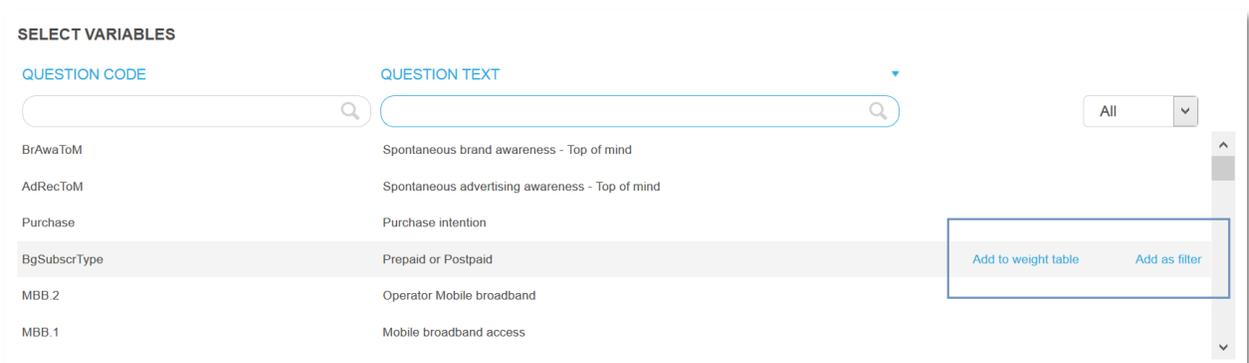
Note: in the example above the new targets are shown with 2 decimals but 15 decimals are used in the actual calculations.

4.1.1.2 Select variables

In the Select Variables section you select which variables to be used (up to six variables) and if any filter variable shall be applied in case of having the need of for example defining different targets for different countries.

The variable list contains all the single choice variables in the project, both the imported variables and computed variables. To select a variable hover over the desired variable and click “Add to weight table” or “Add as Filter”.

The image below shows how to add a variable to the weight table.



Here we see an example where Age and Gender have been added to the weight table and Country has been added as a Filter which allows setting different targets per country.

		Filter: Country2			
		Sweden		Denmark	
		Current (%)	Target (%)	Current (%)	Target (%)
Age group	15-24	14.47	<input type="text" value="15"/>	11.04	<input type="text" value="14"/>
	25-34	14.26	<input type="text" value="15"/>	16.23	<input type="text" value="16"/>
	35-44	15.53	<input type="text" value="15"/>	20.78	<input type="text" value="20"/>
	45-54	21.06	<input type="text" value="20"/>	24.03	<input type="text" value="20"/>
	55-64	17.45	<input type="text" value="20"/>	11.69	<input type="text" value="15"/>
	65 +	17.23	<input type="text" value="15"/>	16.23	<input type="text" value="15"/>
	Sum (%)	99.99999999999999	<input type="text" value="100"/>	100	<input type="text" value="100"/>
Gender	Man	51.70	<input type="text" value="50"/>	49.35	<input type="text" value="50"/>
	Woman	48.30	<input type="text" value="50"/>	50.65	<input type="text" value="50"/>
	Sum (%)	100	<input type="text" value="100"/>	100	<input type="text" value="100"/>

To remove an already selected variable click the “Remove” option either in the variable list or in the weight table.

The image below shows how to remove a selected variable.

SELECT VARIABLES

QUESTION CODE QUESTION TEXT

ChurnLikely Likely to switch operator

Rec Likely to recommend

BgIncome Household Income

bggender Gender Remove from weight table

BgCurrentOp Current operator

Country2 Country2

DEFINE TARGET DISTRIBUTIONS

Rescale Target values if the sum is not equal to 100%

		Current (%)	Target (%)
Age group	15-24	13.62	<input type="text" value="15"/>
	25-34	14.74	<input type="text" value="15"/>
	35-44	16.83	<input type="text" value="16"/>
	45-54	21.79	<input type="text" value="20"/>
	55-64	16.03	<input type="text" value="20"/>
	65 +	16.99	<input type="text" value="15"/>
	Sum (%)	100	<input type="text" value="101"/>
Gender	Man	51.12	<input type="text" value="50"/>
	Woman	48.88	<input type="text" value="50"/>
	Sum (%)	100	<input type="text" value="100"/>

X Remove

4.1.1.3 Define target distributions

In the Define Target distribution section the target distributions are defined in the weight table. The “sum” cell indicates if the sum of the targets is within the defined tolerance from 100% which it has to be to be able to save the weight variable.

The image shows the weight table, the “Current (%)” shows the actual unweighted distribution based on all the data in the project, the “Target (%)” column is used to enter the desired targets.

DEFINE TARGET DISTRIBUTIONS

Rescale Target values if the sum is not equal to 100%

		Current (%)	Target(%)
Age group	15-24	13.62	<input type="text" value="15"/>
	25-34	14.74	<input type="text" value="15"/>
	35-44	16.83	<input type="text" value="16"/>
	45-54	21.79	<input type="text" value="20"/>
	55-64	16.03	<input type="text" value="20"/>
	65 +	16.99	<input type="text" value="15"/>
	Sum (%)	100	101
Gender	Man	51.12	<input type="text" value="50"/>
	Woman	48.88	<input type="text" value="50"/>
	Sum (%)	100	100

The option “Rescale Target values if the sum is not equal to 100%” can be used to rescale the targets automatically so these become 100%. If this is option is ticked you will be able to save the variable even if the sum is not within the defined tolerance from 100% as the new rescaled values will be used.

Here you see an example of when the “Rescale Target values if the sum is not equal to 100%” is ticked, the new rescaled targets are shown in a new column and these will be inserted as targets on save.

DEFINE TARGET DISTRIBUTIONS

Rescale Target values if the sum is not equal to 100%

		Current (%)	Target(%)	Rescaled Target (%)
Age group	15-24	13.62	15	14.85148514851485
	25-34	14.74	15	14.85148514851485
	35-44	16.83	16	15.841584158415841
	45-54	21.79	20	19.801980198019802
	55-64	16.03	20	19.801980198019802
	65 +	16.99	15	14.85148514851485
	Sum (%)	100	101	100
Gender	Man	51.12	50	50
	Woman	48.88	50	50
	Sum (%)	100	100	100

4.2 Updates in Standard Target weighting method

- Some of the new logic related to the new R.I.M weighting method has also been applied to the already existing weighing method. The list below shows the new options.
- The interface has been updated
- The target values are now inserted as % values
- “Filters” can be applied to the weight table which makes it possible to apply different target values in different sub groups, as an example the target distributions might be different for different countries in a multi country brand tracker. (see *how to add filters in chapter 4.1.1.2*)
- An option for automatically rescaling the Targets in case of the actual distribution is zero respondents is available. The option will remove the targets for the “zero count options” and rescale the targets for the remaining options in the same variable (see *details in chapter 4.1.1.1*)
- The weighting can be made within all data in the project or within each data set or within a specified interval like Week, Months, Quarter or year. The ability to weight within each data set is new
- The current unweighted distribution of each combination is now shown in the weight table
- The target values can be rescaled automatically if they do not sum up to 100% (see *details in chapter 4.1.1.3*)

Here we see an example of the weight table when using the Standard target weighting method. As shown the interface been updated, the current unweighted distribution is shown, filters (country in this case) can be applied and the targets can be rescaled if they do not sum up to 100%.

DEFINE TARGET DISTRIBUTIONS
 Rescale Target values if the sum is not equal to 100%

	Filter: Country2			
	Sweden		Denmark	
	Current (%)	Target (%)	Current (%)	Target (%)
15-24 - Man	8.43	<input type="text" value="8"/>	4.93	<input type="text" value="5"/>
15-24 - Woman	7.49	<input type="text" value="8"/>	7.04	<input type="text" value="5"/>
25-34 - Man	8.43	<input type="text" value="10"/>	11.27	<input type="text" value="10"/>
25-34 - Woman	7.26	<input type="text" value="10"/>	6.34	<input type="text" value="10"/>
35-44 - Man	8.90	<input type="text" value="10"/>	7.75	<input type="text" value="10"/>
35-44 - Woman	8.20	<input type="text" value="10"/>	14.79	<input type="text" value="10"/>
45-54 - Man	13.11	<input type="text" value="10"/>	12.68	<input type="text" value="10"/>
45-54 - Woman	10.07	<input type="text" value="10"/>	13.38	<input type="text" value="10"/>
55-64 - Man	9.13	<input type="text" value="8"/>	7.75	<input type="text" value="10"/>
55-64 - Woman	10.07	<input type="text" value="8"/>	4.93	<input type="text" value="10"/>
65+ - Man	8.90	<input type="text" value="4"/>	9.15	<input type="text" value="5"/>
65+ - Woman	0.00	<input type="text" value="4"/>	0.00	<input type="text" value="5"/>
Sum (%)	100	<input type="text" value="100"/>	100.0000000000000001	<input type="text" value="100"/>

5 Stacked data support

Stacked data can now be imported to Dapresy Pro which makes it easier to, for instance, handle brand tracker questionnaires where the same question, like brand statements or campaign follow up questions, are present multiple times. This occurs when the same respondent evaluates multiple brands or different campaigns.

As an example a brand tracker which contains 20 statements for 100 brands usually is represented as 2000 variables (20x100) in the data file which makes it complicated to report on. The solution for creating a friendlier data format for easier reporting is to pull out these “looped” variables into a separate stacked data file which results in a, sometimes vastly, reduced number of variables.

So instead of only importing one data file containing all data for all respondents the data can now be split up into multiple files (a “normal” file + one or more “stacked” files) without losing any filter capabilities across variables located in different imported data sets. The system will automatically connect these files via the Respondent ID for achieving the cross file calculation/filtering.

5.1 Data structure

The images below show an example of how the data structure shall look like when importing stacked data to Dapresy Pro.

The table below shows how the original data structure can look like when it is exported from the survey tool. As shown, the file contains some background variables and a general awareness question and then a set of looped statements, Statement 1-3 is asked for each car brand.

Respondent ID	Response Date	Weight	Gender	Age group	Awareness - Top of Mind	Statement 1 - Volvo	Statement 2 - Volvo	Statement 3 - Volvo	Statement 1 - BMW	Statement 2 - BMW	Statement 3 - BMW	Statement 1 - Toyota	Statement 2 - Toyota	Statement 3 - Toyota
1	2018-02-14	0.9	1	2	8	4	4	3	5	4	4	3	4	4
2	2018-02-14	0.95	2	4	2	3	5	2	5	4	4	4	3	5
3	2018-02-14	1.02	1	3	2	5	4	4	4	5	3	4	3	4
4	2018-02-14	1.01	1	3	4	4	4	3	5	5	4	5	5	4

The tables below shows how a more report friendly data structure can look like which now can be imported to Dapresy Pro. The data has been split up in two files, the “normal” file and a stacked file for all the statements. In the stacked statement file you see that each respondent is present in multiple rows as the respondents answered the statements for multiple brands.

Respondent ID	Response Date	Weight	Gender	Age group	Awareness - Top of Mind
1	2018-02-14	0.9	1	2	8
2	2018-02-14	0.95	2	4	2
3	2018-02-14	1.02	1	3	2
4	2018-02-14	1.01	1	3	4

Respondent ID	Brand	Statement 1	Statement 2	Statement 3
1	Volvo	4	4	3
1	BM	5	4	4
1	Toyota	3	4	4
2	Volvo	3	5	2
2	BM	5	4	4
2	Toyota	4	3	5
3	Volvo	5	4	4
3	BM	4	5	3
3	Toyota	4	3	4
4	Volvo	4	4	3
4	BM	5	5	4
4	Toyota	5	5	4

- The normal data file will follow the same formatting rules as always
- The stacked file will only contain the stacked (looped) variables as the system will use response date, weight and any other data from the normal file when reporting on the stacked file. Due to the “stacked” format the Respondent ID column contains duplicates which usually not allowed but when importing a stacked file it is required as this information is needed as the mapping between the files are be based on the respondent IDs.

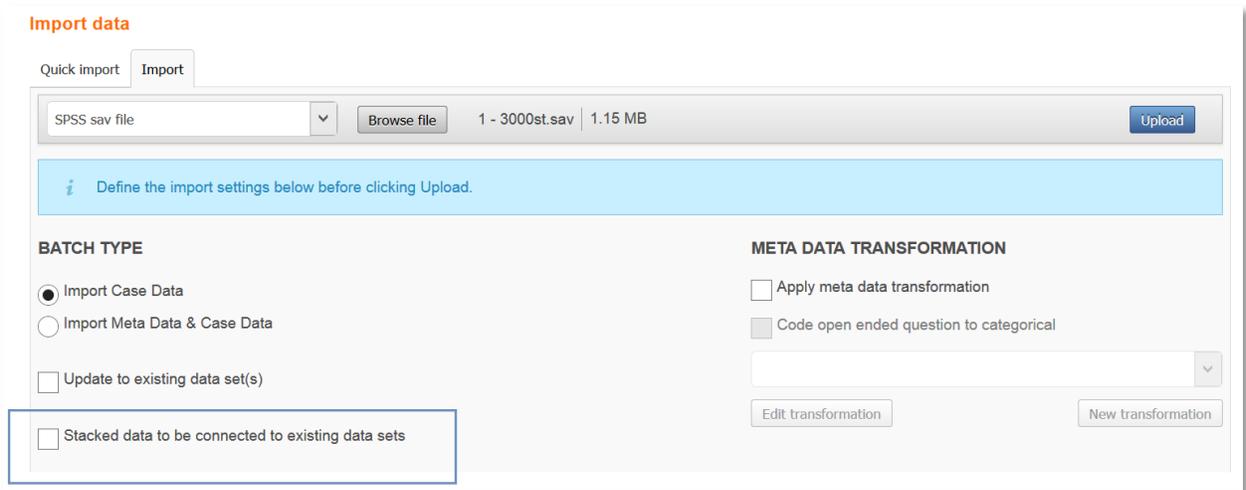
Note: As the calculations are done across the data sets the same variable cannot be imported in both the stacked file and in the flat file as conflicts in base sizes etc. will occur during result calculation. So, if a variable has been imported in a normal file you will not be able to import the same variable in a stacked file and vice versa. This validation is made during the file upload.

5.2 Data Import and Activation process

To import stacked data into a project following the steps below:

- Imported the normal non-stacked part of the data as per normal
- Import the stacked data file, in the Import screen you have to confirm that the file to import is a Stacked file so a different validation process is applied as the file does not contain the standard Weight, Response date fields and there are also duplicates in the Respondent ID fields.
- In the data activation page activate both files. During the activation process all respondents in the stacked file are validated as these respondent IDs must be present in one of the activated normal files, if not the activation will not be successful and there will be an error message identifying the missing Respondent IDs.

The image below shows the Import screen, the tick box “Stacked data to be connected to existing data sets” has to be ticked when the stacked file is imported. The same option is also available in the Import scheduler page.



The image below shows the Data activation page, in the Batch type column all the imported Stacked files are displayed as “Stacked data”. The Number of Respondents column shows the sum of the unique number of Respondent IDs.

Activate Case Data

Activate/Inactivate Data

<input type="checkbox"/>	Data batch	File Name	File Format	Batch Type	Imported Date	Number Of Respondents	Import tag
<input checked="" type="checkbox"/>	1.0	Jan-Feb data.sav	SPSS	New Data	2018-04-25 13:53	100	Edit
<input checked="" type="checkbox"/>	2.0	Jan to Feb, stacked statements.sav	SPSS	Stacked Data	2018-04-25 13:54	100	Edit

5.3 Logic for filtering results across data

The calculating of results across the normal data and stacked data sets are supported in Storyteller and in the Cross table tool 2.0.

Below you find some examples of the logic when calculating result across the data sets, these examples are based on the example data below.

Respondent ID	Response Date	Weight	Gender	Age group	Awareness - Top of Mind
1	2018-02-14	0.9	1	2	8
2	2018-02-14	0.95	2	4	2
3	2018-02-14	1.02	1	3	2
4	2018-02-14	1.01	1	3	4

Respondent ID	Brand	Statement 1	Statement 2	Statement 3
1	Volvo	5	4	3
1	BM	5	4	4
1	Toyota	3	4	4
2	Volvo	3	5	2
2	BM	5	4	4
2	Toyota	4	3	5
3	Volvo	5	4	4
3	BM	4	5	3
3	Toyota	4	3	4
4	Volvo	4	4	3
4	BM	3	5	4
4	Toyota	3	5	4

Example 1: Variable in normal file filtered by variable in stacked file

- Selected Question: Awareness Top of mind, Answer 2
- Selected Filter: Statement 1, answer 5
- Result calculation: $2/3=66.67\%$

The green cells in the stacked data fulfill the filtering criteria so Respondent Id 1, 2 and 3 are used in result calculation.

Respondent ID	Response Date	Weight	Gender	Age group	Awareness - Top of Mind
1	2018-02-14	0.9	1	2	8
2	2018-02-14	0.95	2	4	2
3	2018-02-14	1.02	1	3	2
4	2018-02-14	1.01	1	3	4

Respondent ID	Brand	Statement 1	Statement 2	Statement 3
1	Volvo	5	4	3
1	BM	5	4	4
1	Toyota	3	4	4
2	Volvo	3	5	2
2	BM	5	4	4
2	Toyota	4	3	5
3	Volvo	5	4	4
3	BM	4	5	3
3	Toyota	4	3	4
4	Volvo	4	4	3
4	BM	3	5	4
4	Toyota	3	5	4

Example 2: Variable from normal file filtered by variables in stacked file and normal file

- Selected Question: Awareness Top of Mind, Answer 2
- Selected Filter: Statement 1, Answer 5 and Gender, Answer 1
- Result calculation: $1/2=50\%$

The green cells in the stacked data fulfill the filtering criteria but only respondent id 1 and 3 fulfill the Gender filter in the normal file so only Respondent Id 1 and 2 are used in result calculation.

Respondent ID	Response Date	Weight	Gender	Age group	Awareness - Top of Mind
1	2018-02-14	0.9	1	2	8
2	2018-02-14	0.95	2	4	2
3	2018-02-14	1.02	1	3	2
4	2018-02-14	1.01	1	3	4

Respondent ID	Brand	Statement 1	Statement 2	Statement 3
1	Volvo	5	4	3
1	BM	5	4	4
1	Toyota	3	4	4
2	Volvo	3	5	2
2	BM	5	4	4
2	Toyota	4	3	5
3	Volvo	5	4	4
3	BM	4	5	3
3	Toyota	4	3	4
4	Volvo	4	4	3
4	BM	3	5	4
4	Toyota	3	5	4

Example 3: Variable from stacked file filtered by variable in normal file

- Selected Question: Statement 1, Answer 4
- Selected Filter: Gender, answer 1
- Result calculation: $3/9=33.33\%$

The green cells in the normal data fulfill the filtering criteria so Respondent Id 1, 3 and 4 are used in result calculation.

Respondent ID	Response Date	Weight	Gender	Age group	Awareness - Top of Mind
1	2018-02-14	0.9	1	2	8
2	2018-02-14	0.95	2	4	2
3	2018-02-14	1.02	1	3	2
4	2018-02-14	1.01	1	3	4

Respondent ID	Brand	Statement 1	Statement 2	Statement 3
1	Volvo	5	4	3
1	BM	5	4	4
1	Toyota	3	4	4
2	Volvo	3	5	2
2	BM	5	4	4
2	Toyota	4	3	5
3	Volvo	5	4	4
3	BM	4	5	3
3	Toyota	4	3	4
4	Volvo	4	4	3
4	BM	3	5	4
4	Toyota	3	5	4

Example 4: Variable from stacked file filtered by variables in normal and stacked file

- Selected Question: Statement 1, Answer 4
- Selected Filter: Gender, Answer 1 and Statement 2, Answer 5
- Respondents fulfilling the filter, these which will be included in the calculation of the result: 3 and 4
- Result calculation: $1/3=33.33\%$

The green cells in the normal data fulfill the filtering criteria and out of those are only the green cells in the Stacked file fulfilling the filter so only these 3 respondents are used in result calculation.

Respondent ID	Response Date	Weight	Gender	Age group	Awareness - Top of Mind
1	2018-02-14	0.9	1	2	8
2	2018-02-14	0.95	2	4	2
3	2018-02-14	1.02	1	3	2
4	2018-02-14	1.01	1	3	4

Respondent ID	Brand	Statement 1	Statement 2	Statement 3
1	Volvo	5	4	3
1	BM	5	4	4
1	Toyota	3	4	4
2	Volvo	3	5	2
2	BM	5	4	4
2	Toyota	4	3	5
3	Volvo	5	4	4
3	BM	4	5	3
3	Toyota	4	3	4
4	Volvo	4	4	3
4	BM	3	5	4
4	Toyota	3	5	4

5.3.1 Filtering exception when having multiple stacked data sources

In case of having more than 1 stacked data source like in the example below filtering across the stacked data sets is not supported when the selected question comes from any of the stacked data sets.

E.g. if the selected question comes from the third file in the image below it is not supported to use filter variables from both the stacked files simultaneously.

If the selected question comes from the normal file you can apply filters from both the stacked files simultaneously.

Normal data file

Respondent	ResponseDate	Weight	BgCurrentOp	BgSubscType	BgAgegroup
1	2011/01/01	1.00	Sweet Talk	Postpaid	15-24
2	2011/01/01	2.00	Dapresy Telec...	Prepaid	55-64
3	2011/01/01	3.00	WTC	Prepaid	45-54
4	2011/01/02	4.00	DonkyCom	Prepaid	45-54
5	2011/01/02	5.00	Dapresy Telec...	Prepaid	45-54
6	2011/01/02	6.00	Dapresy Telec...	Prepaid	55-64
7	2011/01/02	7.00	Dapresy Telec...	Prepaid	65 +

Stacked data file for Campaign variables

Respondentid	Ad	Seen
1	Volvo service on TV	Yes
2	Radio ad lorem ipsum	Yes
3	Ad Zlatan driving volvo in forest	Yes
4	S90 premium model	Yes
5	New XC90 electric hybrid	No
6	Volvo service on TV	No
7	Radio ad lorem ipsum	No

Stacked data file for Statement variables

Respondentid	Brand	st1	st2
1	Dapresy Telecom	5 Very likely	1 Not at all
2	Four	5 Very likely	1 Not at all
3	Swedish Telecom	1 Not at all	1 Not at all
4	Sweet Talk	2 1 Not at all	
5	Telecom for You	5 Very likely	1 Not at all
6	Dapresy Telecom	5 Very likely	2
7	Four	5 Very likely	5 Very likely

5.4 Data administration

When computing new variables in Dapresy Pro the data is inserted at the respondent level which causes some limitations when using stacked data which are described in next three chapters.

5.4.1 Computed variables and Merged Variables

When creating a Computed variable new raw data is inserted on a respondent level. In cases of having Stacked data in the project the inserted data will either be appended to the normal data file or the stacked data file depending of the used condition:

- If the condition contains any of the variables from the stacked data file, the data is inserted in the stacked data
- if the condition contains variables from the normal data file, the data is inserted in the regular respondents.

5.4.2 Indexes

An Index can only be based on variables from the same data set which means that it is not possible to create an index based on questions from both the normal file and the stacked file. The limitation is needed for handling the calculations correctly.

5.4.3 Input variables

Input variables cannot be based on variables from the stacked data file.

5.4.4 Data exports

When exporting raw data the stacked and the standard data cannot be merged into a single file due to the different structures of the data. In this first version of the stacked data support only the standard data will be exported when using the raw data export functionality, in the near future support for exporting the stacked data in separate data files will be added.

6 Data recoding updates

The Data recoding module has been updated for better GDPR support, see an overview of the improvements below:

- New ability to include filters based on Open ended variables such as email addresses etc. which makes it easier to clean and recode data for specific persons
- New ability to recode data permanently, this in combination with for example the ability to recode data automatically after a certain period of time makes it easy to permanently remove personal information from the data
- New ability to delete respondents

6.1 Filter recoding rules by open ended (string) variables

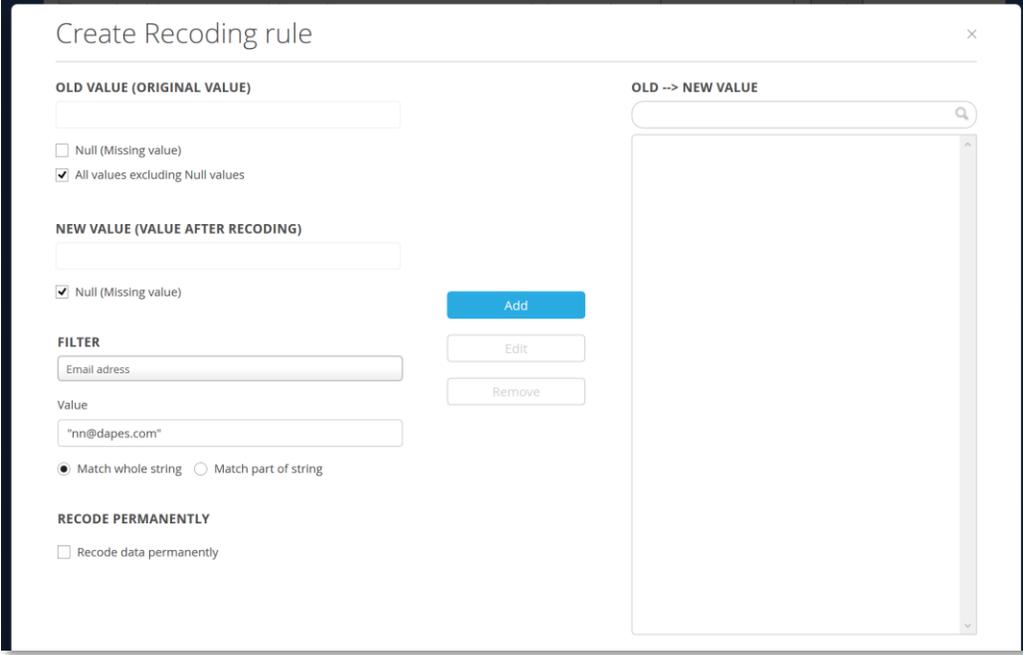
Open ended variables can now be used as filters when setting up recoding rules, since it was already possible to use categorical variables, response date and respondent id as filters. This allows easier correction of data as a data set does not need to be corrected outside Dapresy Pro when updating just a few values. It also makes it easier to recode data for a certain respondent where for example only the email address is known and not the respondent id.

6.1.1 Setup

When using Open ended variables as the filter, enter the string to be used as filter in double quotes. Multiple strings must be separated by a semi-colon (;). You can also define if the text should match the whole string or just part of the string.

Example: The data for respondent id 1000 is nn@dapresy.com in the Email variable (an open-ended text variable). If the filter is defined as “dapresy.com” and “Match part of the string” is applied this respondent will fulfill the filter criteria, if the option “Match whole string” is applied it will not fulfil the filter criteria.

Here we see an example of using an open-ended variable as filter in a recoding rule.



6.2 Filter recoding rules by open numeric variables

Open numeric variables can now be used as filters when setting up recoding rules (it was already possible to use categorical variables, response date and respondent id as filters). This allows easier correction of data as a data set does not need to be corrected outside Dapresy Pro in cases of having to update a small subset of the data.

6.2.1 Setup

When using Open numeric variables as the filter you can select to add a range or single values. If single values are used you can enter multiple values separated by a semi-colon (;). Both options are shown in the example image below.

Here we see an example of using an Open Numeric variable as filter in a recoding rule, as shown the option Single value has been selected.

Create Recoding rule

OLD VALUE (ORIGINAL VALUE)

Segment A
 Segment B

Null (Missing value)

NEW VALUE (VALUE AFTER RECODING)

Null (Missing value)

FILTER

Value ▼

RECODE PERMANENTLY

Recode data permanently

OLD -> NEW VALUE

Add

Edit

Remove

Close

Here we see an example of using an Open Numeric variable as filter in a recoding rule, as shown the option Range has been selected.

Create Recoding rule

OLD VALUE (ORIGINAL VALUE)

Segment A
 Segment B

Null (Missing value)

NEW VALUE (VALUE AFTER RECODING)

Null (Missing value)

FILTER

Range ▼

From

Through

RECODE PERMANENTLY

Recode data permanently

OLD -> NEW VALUE

Add

Edit

Remove

Close

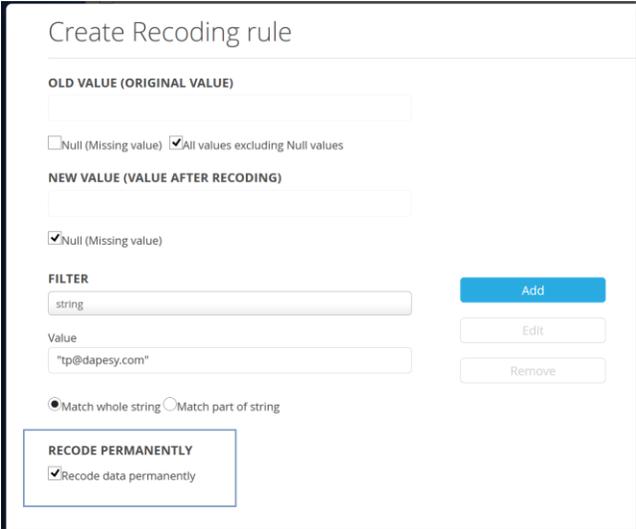
6.3 Recode data permanently

New ability to recode data permanently has been added which makes it easy to permanently remove personal information from the data which is a requirement for the data minimization and data retention GDPR policies.

6.3.1 Setup

To recode data permanently, tick the newly added option “Recode data permanently” when setting up the recoding rule (see image below). The data will then be changed irrevocably during the next data activations which means that it is not possible to get the original data back so the feature must be used with caution.

Here we see the new option to recode data permanently.



Create Recoding rule

OLD VALUE (ORIGINAL VALUE)

Null (Missing value) All values excluding Null values

NEW VALUE (VALUE AFTER RECODING)

Null (Missing value)

FILTER

Value

Match whole string Match part of string

RECODE PERMANENTLY

Recode data permanently

6.5 Delete respondents

New support for deleting respondents from the activated data have been added which makes it easier to correct data without having to do manual changes outside Dapresy Pro and re-importing the file.

The logic is the same as when setting up cleaning and recoding rules which means that you define the respondent ids to be deleted and then these will be removed from all future data sets, you can define single respondent ids or ranges.

Note: The respondents are deleted from the “activated” data only, which means that you can always get these back by amending the “delete respondent rule”.

6.5.1 Setup

Enter the ids of the respondents to be deleted in the “Respondent to be deleted” input box in the bottom of the Data cleaning/recoding page. Multiple ids shall be separated by comma (,) and a range shall be separated with a dash to separate the start and end id.

Here we see the input fields for defining which respondents to be deleted during the data activation.

<input type="checkbox"/>	QUESTION ID	QUESTION TEXT	ANSWER CHOICES FOR SCALE		REMOVE
<input type="checkbox"/>	BrAwaToM	Spontaneous brand awareness - Top of mind	Single choice not scale		Recode
<input type="checkbox"/>	BrAwaIM	Spontaneous brand awareness - In mind	Multiple choice		Recode
<input type="checkbox"/>	AdRecToM	Spontaneous advertising awareness - Top of mind	Single choice not scale		Recode
<input type="checkbox"/>	AdRecIM	Spontaneous advertising awareness - In mind	Multiple choice		Recode

RESPONDENTS TO BE DELETED

1-100, 9232,78211

7 Compute and Input variables updates

Two updates have been made in the Compute and Input variables functionality:

- New ability to use floating time periods in expression when computing categorical variables like, for example, “Last 2 months”
- Improved logic when computing numeric variables based on dates, “CurrentDate” can now be used when calculating the number of days between the activation date and a specific date.

7.1 Floating time periods

Support for using floating time periods in expression when computing categorical variables like for example “Last 2 months” has been added. The update makes it easier and more efficient to make special comparisons like for example “Latest month” compared to “Same month last year” without having to do any manual updates when new data is loaded in a tracker.

7.1.1 Setup

When computing categorical variable and using Date variables in the expressions the following can now be used in the expressions:

- “Last X days”
- “Last X weeks”
- “Last X months”
- “Last X quarters”
- “Last X Years”

X= any whole number

Below you see a couple of example expressions:

- `1110000000001-Response Date` = "Last 1 week" → will include all respondents with an interview date belonging to the last 1 week
- `1110000000001-Response Date` = "Last 13 months" → will include all respondents with an interview date belonging to the last 13 months

By for example combining two floating time periods you can now easily compare the last month to the same month last year by computing a variable with 2 answers which both uses a floating time period, see example below.

- **Answer 1, Last month;** ($\text{Date} - \text{Response Date} = \text{"Last 1 month"}$)
- **Answer 2, Same month last year;** ($\text{Date} - \text{Response Date} = \text{"Last 13 months"}$) AND NOT ($\text{Date} - \text{Response Date} = \text{"Last 12 months"}$)

Note: The “last month”, “last week” etc. is calculated on the most recent response date and not by today’s date, it is the same logic as is used in charts and tables when applying floating time periods.

Example: A project has data until the 27th of April 2018,

- Last 1 Day = 27th of April 2018
- Last 1 Week = week 17
- Last 1 Month = April
- Last 1 Quarter = Quarter 2
- Last 1 year = 2018

7.2 Improved logic in Open numeric - support for calculating number of days between a date variable and current date

The logic used to compute Open numeric variables based on dates has been improved, it is now supported to use “Current date” in the expression when subtracting one date from another date to get the number of days in-between those. The update is useful in client follow-up processes as it makes it easier to get data for the number of days an alert has been in a certain step (like “New”, “In progress”, “Closed” etc.)

7.2.1 Setup

To subtract a date from the current date (data activation date) to get the number of days elapsed create an Open numeric computed variable and use the following expression:

- $\text{"#CurrentDate#"} - \text{Date}$

The date variable can be any date variable in the project.

Note: CurrentDate is based on the date on which the data was activated so it is only recommended to use this function in projects with daily data uploads. The number of days value will not update automatically.

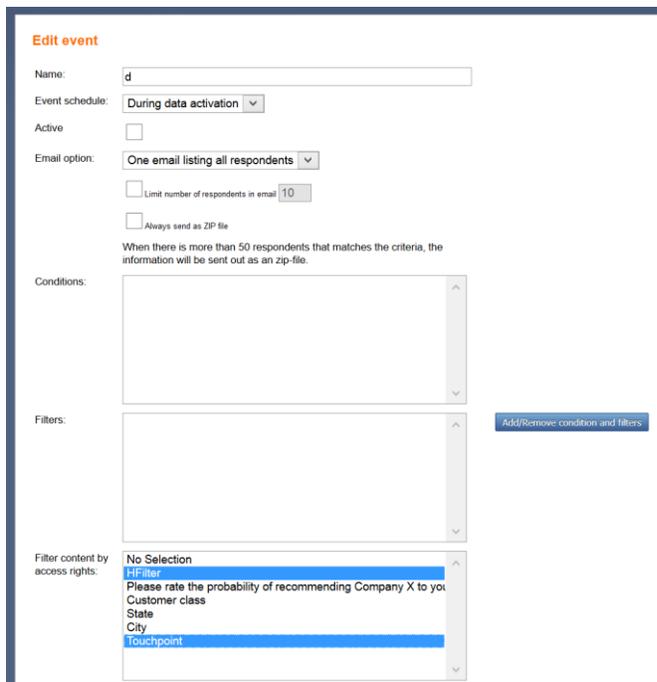
8 Events update in filtering logic

When setting up an Event it has been possible to apply access right for the users by using the hierarchical filter or by any other filter in the project so each user only receives relevant events (alerts). This filtering logic has now been improved so multiple filters can be combined which makes the setup more efficient as less Events need to be created in a case where, for example, the events need to be filtered by the access right of both the hierarchical filter and a regular filter.

8.1 Setup

The filter list in the Event setup is now supporting multi selection as shown in the image below, previously it was only possible to select a single option in this filter list.

Here we see an example where the access of both the hierarchical filter and the Touchpoint variable will be used to limit the events per user.



Note: When multiple filters are selected these are always treated as “AND” and not as “OR” so it is the intersection of the applied filters that gives each user the relevant events based on their access rights.

9 Form report updates

The Form report has been improved to handle the client follow up processes better.

- There is new support for using Respondent data tables in the Forms that makes the setup of a Form faster and easier to achieve correctly aligned layout.
- There is also a new support for viewing and analyzing the “customer history” in a Form when the same person/client participated in the survey multiple times. With this new function it is easier to view and analyze the history of the person/client before making any follow-up actions.

9.1 Use of Respondent Data table in Forms

New support for using Respondent data tables in Forms makes the setup of a Form faster and also easier to get an aligned layout as you work with less number of objects. Also, it is better from a performance perspective to use one respondent Data table instead of many Data Fields as it is faster to load a Form with less objects.

Another positive effect of using the Respondent Data table instead of the Data Fields is the support of coloring/styling values by using the formatting rules functionality which is not available in the Data objects. As an example, a very low Recommendation score can be automatically colored red to give it more impact.

Here we see an example where the Respondent Data table object has been used in a Form. Cell formatting is used to color the Recommendation score and as shown the user can open a second Form report to view even more information about the respondent.

Customer details	
Date	2011-03-01
Recommendation	2
Name	First Name X Last Name Y
Clientid	139
Phonenumber	xx xx xx x
Customer class	Class F
Workshop	Albany
Status	
View more...	View more...

9.1.1 Setup

The Respondent data table object is in the ribbon menu as shown in the image below. The setup of the Respondent data table in the Form works in a very similar way as when using the same object in the Storyteller report. The difference is that the table only shows data for the selected respondent so settings connected to Filters and Time periods are not shown.

Here we see where you find the Respondent Data table object in the Form setup.



9.2 Customer History tracking process

Support for viewing and analyzing the “customer history” in a Form when the same person/client participated in the survey multiple times has been added. This new logic improves the follow-up process as makes it easier to perform relevant actions by analyzing the history of the client.

Example: A Car Workshop company performs a short follow-up survey as soon as a client used their services. In case of giving a low recommendation score the company creates a plan based on a defined action process. In these cases, it is very valuable to understand the history of the client: is it the first time the same client is unsatisfied or has it, in fact, happened several times? By having this information, the relevant action, perhaps a call back to the client will be better managed as the history is available.

This process has until now not been possible to perform in Dapresy Pro as the same client will get different respondent ids each time he/she participates in a survey and the Form shows data for one certain respondent id only. Now using the new Customer History tracker setting in the Respondent data table in the Form this process can be achieved as long as there is a unique identifier in the data files which represents the same client.

Here we have an example of a Form that uses the Customer History Tracking feature. The Customer data section shows the information uploaded for the selected client and the user actions are logged in the Actions section. The Customer History section shows that this client has been involved in three earlier follow-up processes and the content of these can be reviewed by clicking the “View” links.

Customer data

Date: 2011-03-01

Name: First Name X Last Name Y

Recommendation: **Very unlikely = 0**

Customer class

Age

State: South Carolina

Workshop: Charleston

Clientid: 140

phonenumber: xx xx xx x

Open comment:
 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed id feugiat ex. Curabitur finibus ornare sodales. Nam gravida dictum eros, quis mattis nunc porttitor sed.

Actions

Status:

Why was the client unsatisfied?

Action to keep the client:

Customer history

	Recommendation	Workshop	Status
View	9	Charleston	Closed
View	5	Birmingham	Closed
View	Very likely = 10	Miami	Closed

9.2.1 Setup

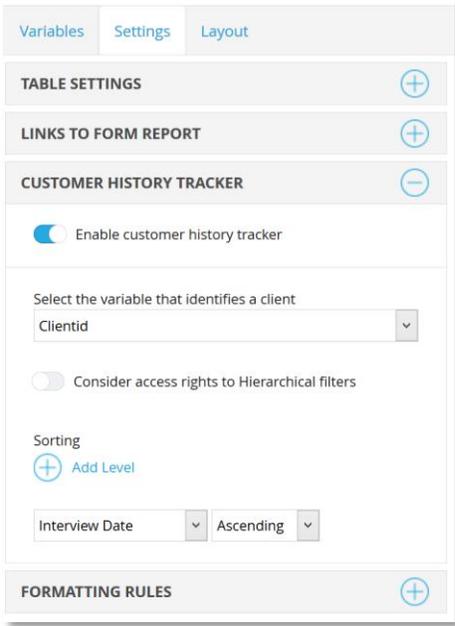
To show the customer history in a Form you should use the Respondent Data table and you need to have a variable that identifies a specific entity, e.g. client or company, it can be a categorical, numeric or an open-ended variable.

The following is required to apply the Customer History Tracker logic (see setup interface further down)

- Add a Respondent Data table to the Form report
- Add the desired variables to be shown in the table
- Go to the Settings tab and the Customer History Tracker panel
- Enable Customer History Tracker function (the Respondent Data table will now only show data for other respondents which belongs to the same entity, let's say a client in this case)
- Select the variable that identifies the client
- Select if Hierarchical Filter access rights shall be considered or not*
- Define the sorting in the table, shall it be sorted by response date or any other variable in the table like for example a Recommendation score.

*If the access right to Hierarchical filters are applied the Report user will only show respondents that belong to any of the hierarchical filters the user has access to, if these access rights are not considered all Report users will see all response data that belongs to the same client no matter what hierarchical filter units they belong to. Which option to use depends on what business rules are required.

Here we see the setup interface of the Customer History Tracker in the Respondent Data table in a Form report.



The screenshot shows a settings panel with three tabs: Variables, Settings (selected), and Layout. The panel is divided into several sections:

- TABLE SETTINGS** (with a plus icon)
- LINKS TO FORM REPORT** (with a plus icon)
- CUSTOMER HISTORY TRACKER** (with a minus icon)
 - Enable customer history tracker
 - Select the variable that identifies a client: Clientid (dropdown menu)
 - Consider access rights to Hierarchical filters
 - Sorting
 - Add Level
 - Interview Date (dropdown menu) Ascending (dropdown menu)
- FORMATTING RULES** (with a plus icon)

10 Respondent data table updates

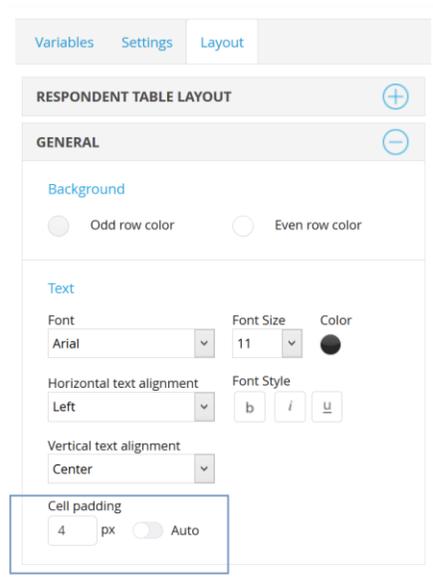
Two minor updates have been made in the Respondent data table;

- A new padding setting has been added for creating the appropriate white space.
- The Factor average of a categorical variable can now be displayed instead of the answer text/answer id

10.1 Cell padding

By using cell padding you can create lighter and airier tables. The default padding, on newly created tables, will be 4 pixels. All existing tables use an “Auto” setting which means that they use the same padding as before.

Here we see the new padding setting in the Respondent Data table.



10.1 Show Factor Average instead of Answer text/id

The data of categorical variable could previously have been displayed as Answer text or Answer ID in the Respondent Data table, a new option for showing the Factor average has now been added which for example is useful in case of having re-scaled a scale question from 1-5 to 0-100.

Here we see the setting for displaying the factor average of a categorical question.

FILTERING

All questions

Show Variable Subset

SELECTION

Available Variables

Current operator

- Prepaid or Postpaid
- Age group
- Age group original
- Gender
- Household Income
- Spontaneous brand awareness - Top of mind
- Spontaneous brand awareness - In mind
- Spontaneous advertising awareness - Top of mind
- Spontaneous advertising awareness - In mind
- Brand Consideration - Dapresy Telecom
- Brand Consideration - Four

[+ Add](#)

[Export to Excel](#)
[Update Preview](#)

ROWS & COLUMNS

Display header	Custom title	Title Text	Allow Filter	Format	Show thousand separator	Order
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Respondent ID	<input checked="" type="checkbox"/>			0
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date	<input checked="" type="checkbox"/>			1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Statement 1	<input checked="" type="checkbox"/>	Factor average		31
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Statement 2	<input checked="" type="checkbox"/>	Answer Text		32
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Statement 3	<input checked="" type="checkbox"/>	Answer ID		33
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Statement 4	<input checked="" type="checkbox"/>	Factor average		34
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Statement 5	<input checked="" type="checkbox"/>	Factor average		35
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Statement 6	<input checked="" type="checkbox"/>	Factor average		36

Here we see an example table that displays the factor average which is 0, 25, 50, 75 and 100 in this example instead of the original 1-5 scale.

Respondent ID	Date	Statement 1	Statement 2	Statement 3	Statement 4	Statement 5	Statement 6
1	2011-01-01	100	25	0	75	25	75
2	2011-01-01	50	25	50	0	25	
3	2011-01-01	75	50	0	100	0	50
625	2011-01-01	100	25	0	75	25	75
626	2011-01-01	50	25	50	0	25	
627	2011-01-01	75	50	0	100	0	50
1249	2011-01-01	100	25	0	75	25	75
1250	2011-01-01	50	25	50	0	25	
1251	2011-01-01	75	50	0	100	0	50
1873	2011-01-01	100	25	0	75	25	75
1874	2011-01-01	50	25	50	0	25	
1875	2011-01-01	75	50	0	100	0	50
2497	2011-01-01	100	25	0	75	25	75
2498	2011-01-01	50	25	50	0	25	

11 Storyteller charts and tables - improved sorting of Hierarchical Filter nodes

When displaying multiple hierarchical filter nodes in a Storyteller chart or table the sorting has been made by “level” when the sorting option “Internal order” has been applied but now you can select if the sorting will be by levels or by branches, see the effect of these settings in the example below.

Example; The hierarchical filter structure is like this;

- England
 - London
 - Liverpool
- Germany
 - Berlin
 - Hamburg
- Sweden
 - Stockholm
 - Malmö

By level

If all the nodes from above are shown in a table, in for example rows, and the internal sort order by level is applied the nodes will be ordered as the following:

- England
- Germany
- Sweden
- London
- Liverpool
- Berlin
- Hamburg
- Stockholm
- Malmö

By branch

If all the nodes from above are shown in a table, in for example rows, and the internal sort order by branch is applied the nodes will be ordered as the following:

- England
- London
- Liverpool
- Germany
- Berlin
- Hamburg
- Sweden
- Stockholm
- Malmö

The default value is By level which also is the behavior prior to this release.

12 Storyteller setup improvements

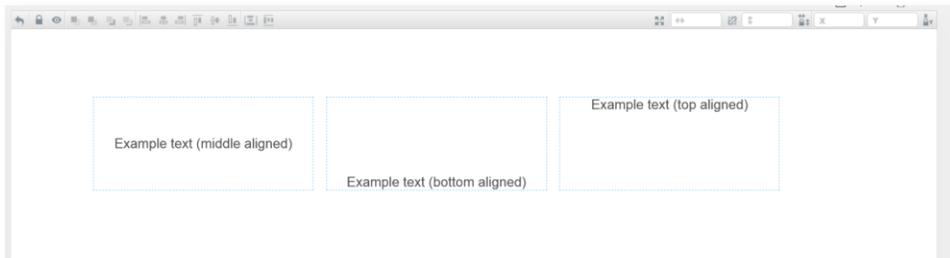
Two improvements that make the setup of a Storyteller report more efficient have been added.

- Vertical text alignment in Text boxes
- A new “Paste here” option

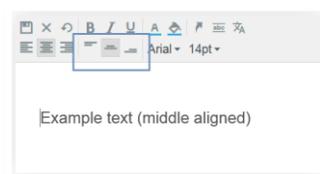
12.1 Vertical text alignment

A vertical text alignment setting has been added to the Text boxes so the text can now be top, middle or bottom aligned. The default value is top so the default behavior has not been changed.

Here we see an example of the different vertical text alignments.



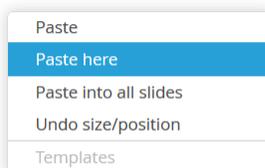
Here we see the new options in the setup of the Text box.



12.2 Improved copy/paste logic - Paste here

When making a copy/paste you can now select to paste the object(s) in a certain position by selecting the option “Paste here” instead of “Paste”. This improvement makes it easier particularly to work in very long slides as you do not need to drag a pasted object to get it into the right position.

Here we see the new “Paste here” option in the context menu appearing on right click.



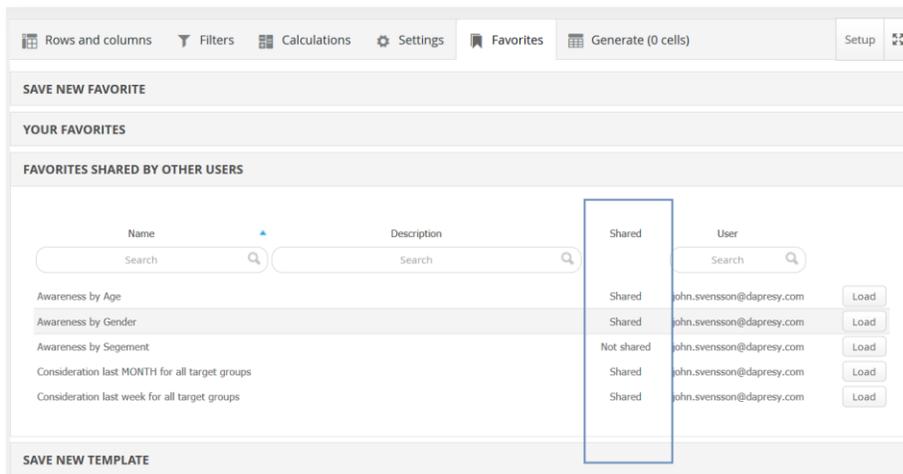
13 Cross table tool updates in sharing of favorites

In the Cross table tool, the Report user can share saved favorite tables, the Administrator now has the ability to remove sharing of shared favorite tables which is useful when users share irrelevant favorites which do not have an applicable general interest.

13.1 Setup

To un-share a currently shared favorite table enter the panel for shared favorites and click in the Shared column to change the share status to Not shared.

Here we see the Favorites shared by other users panel, simply click in the Shared column to change the status.



Note: Only the Administrator users have access to change the Share status of other users' favorites, a report user can only update his/her own favorites.