June

Product Release

Customer Success

July 8, 2024

a PG Forsta company

Welcome!

In the month of June, we've added more enhancements to **Forsta Plus including:**

- AI Summary Widget and Tile in **Studio**
- **CATI** settings to adjust behavior for interviewers working in Manual Selection
- Hierarchies are now accessible from **SmartHub**
- Contact Database Sampling Add-On
- Email opt-out capability in **Survey Designer**

On **Forsta Surveys** we have launched our Secure Sample Integration (Forsta S2S) with four sample providers.

Additionally, June was a big month for **Forsta Visualizations** updates within StoryTeller, the Cross Table Tool, Data Management and Project administration. Here are a few highlights:

- Introducing a Summary AI object
- Metadata transformation log
- Support of Unique respondent ID based on source
- Customer overview page

Keep reading to learn about these improvements!

Forsta Plus

Studio

1. AI Summary Widget & AI Summary Tile

   The AI Summary Widget & Tile leverages generative AI to respond to up to 5 user configured prompts, based on up to 1000 comments. It can be used to create summaries of themes, actions to take, percentages of pos/neg comments etc.

   What's New

- Now wrapped as a Widget in its own right, and available in the new "AI" area of the Studio Widget Library, with tour guide.
- Comment limit increased from 500 to 1000 comments.
- Upgraded to gpt-35-turbo-16k to take advantage of much higher request limits.

- Ability to specify date (if available in dataset) to use for sorting comments.
- Automatic trimming of requests if limits exceeded. A warning is displayed in this instance.
- Improved error/ timeout handling.
- Minor UI updates.

Leveraging generative AI in a reporting tool for customer feedback offers benefits such as enhanced natural language understanding, automated summarization, insightful reporting, scalability, consistency, real-time analysis, personalization, cost efficiency, and anomaly detection. These advantages can lead to improved customer satisfaction, more informed business decisions, and a competitive edge in the market.

Check out this Knowledge Base article for more information: https://forstastudio.zendesk.com/hc/en-us/articles/25103289129371-Setting-up-an-AI-Summary-Tile

CATI

1. Manual Selection Mode Settings

Three new settings have been added to be able to adjust the default behavior for Interviewers working in Manual Selection mode (under Manual Selection, interviewers are presented with a list of sample contacts to pick from to start each call). These settings apply for all interviewers working in the company and are located under the Admin/Settings/Interviewer Console UI which is accessible to any user with CATI Administrator permission when working in the CATI Supervisor interface.

a. **Enable ordering of interviews by priority in the manual selection screen**
This setting is enabled by default. A company with many users working with manual selection may wish to disable this setting to reduce the likelihood of multiple interviewers attempting to pick an interview record which has already been started by another interviewer (in the event they do this a warning will be displayed and they would not be able to enter the interview, although seeing this message frequently could become inefficient so preventing high priority records being shown at the top of the list could be more desirable).

b. **Enable interview randomization in the manual selection screen**
This setting is disabled by default. A company with many users working with manual selection may wish to disable this setting to reduce the likelihood of multiple interviewers attempting to pick an interview record which has already been started by another interviewer (in the event they do this a warning will be displayed and they would not be able to enter the interview, although seeing this message frequently could become inefficient so having the list randomised could be more desirable).

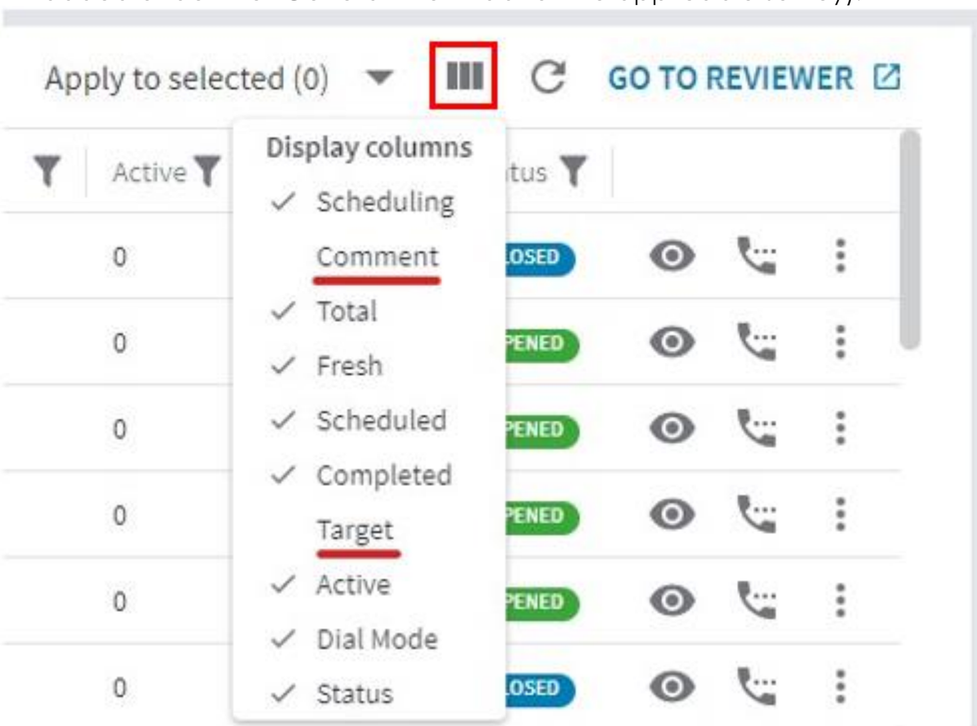
c. **Show only calls valid in the current shift in the manual selection screen**
This setting is disabled by default. This setting can be enabled so that the list of

interviews presented in the manual selection screen will be filtered to exclude any calls that are not valid for the current shift the interviewer is working on. This setting will also filter out any calls which have a 'Time to call' value which is set for the future (e.g. no reply, busy or appointments etc.).

2. Survey List Column Picker

In addition to the new settings, we have also added a column selector to the Surveys List screen. This allows supervisors to hide/show columns in the surveys list. There are two new columns (hidden by default) that can also now be enabled using this feature:

a. **Comment -** this allows for comments attached to any survey to be seen (comments can now be added under the 'General' view tab for the applicable survey).
b. **Target -** this can be used to display the Target value assigned to the survey (targets can be added under the 'General' view tab for the applicable survey).



SmartHub

1. Hierarchies in SmartHub

Hierarchies are now accessible from SmartHub, in a new tab on the Contacts page. This makes it easy to see which hierarchies are linked to the hub. When you open a hierarchy, you will be taken to Hierarchy Management and can interact with the hierarchy as usual. You can also add new hierarchies or link an existing hierarchy to the hub.

Finally, you can also delete hierarchies from the list. This will delete the hierarchy permanently.

2. Freeze period for Pulse Surveys

   On some occasions Pulse Program administrators may want to prevent survey send outs within certain periods, for example during a holiday period. Now Pulse Program administrators can define periods in the CDL that survey start/end dates are not allowed to intersect with, which again will prevent such surveys from being committed. Note that this will not affect live surveys that were committed before the freeze period was enabled in the CDL.

3. Contact Database Sampling Add-On

   Overview
   The Contact Database Sampling Add-On enables you to create a diverse and representative sample of contacts for your surveys. This add-on allows you to randomly select contacts and seamlessly upload them as respondents to your target survey.

   What's New
   For this release we have focused on logging, troubleshooting and error handling to make the sampling process smoother and more transparent for the user. You can now view logs for each sample run and get insight on what happened in the underlying steps that resulted in the drawn contacts. You can easily see how many qualified with the filters, how many got screened out due to Contact Frequency Rules and what the outcome was.
   a. Activity Log shows what happened during the sampling run.
   b. If there is a problem with a sample job, which causes it to be disabled, the sampling job owner will get notified via email and inbox notification.
   c. We also made extensive changes under the hood to make the sampling execution process faster and more scalable.

Please check out this Knowledge Base article for additional information: https://forstasmarthub.zendesk.com/hc/en-us/sections/14970630452123-Contact-Database-Sampling

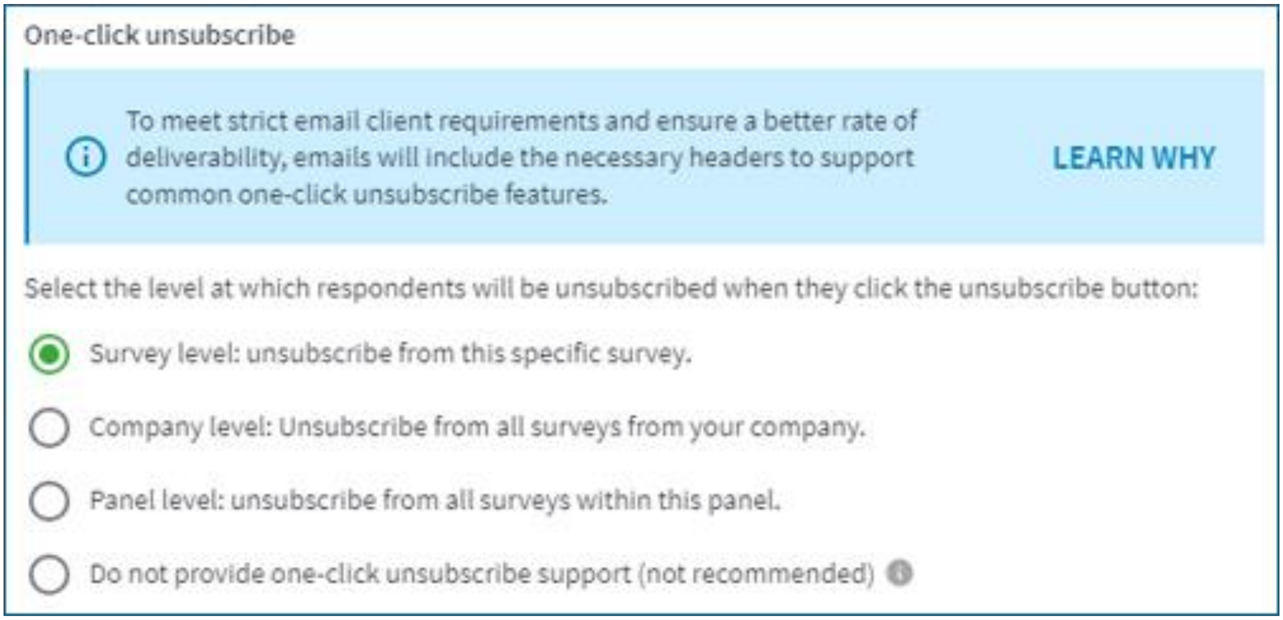
Survey Designer

1. One-click Unsubscribe for Survey Invites

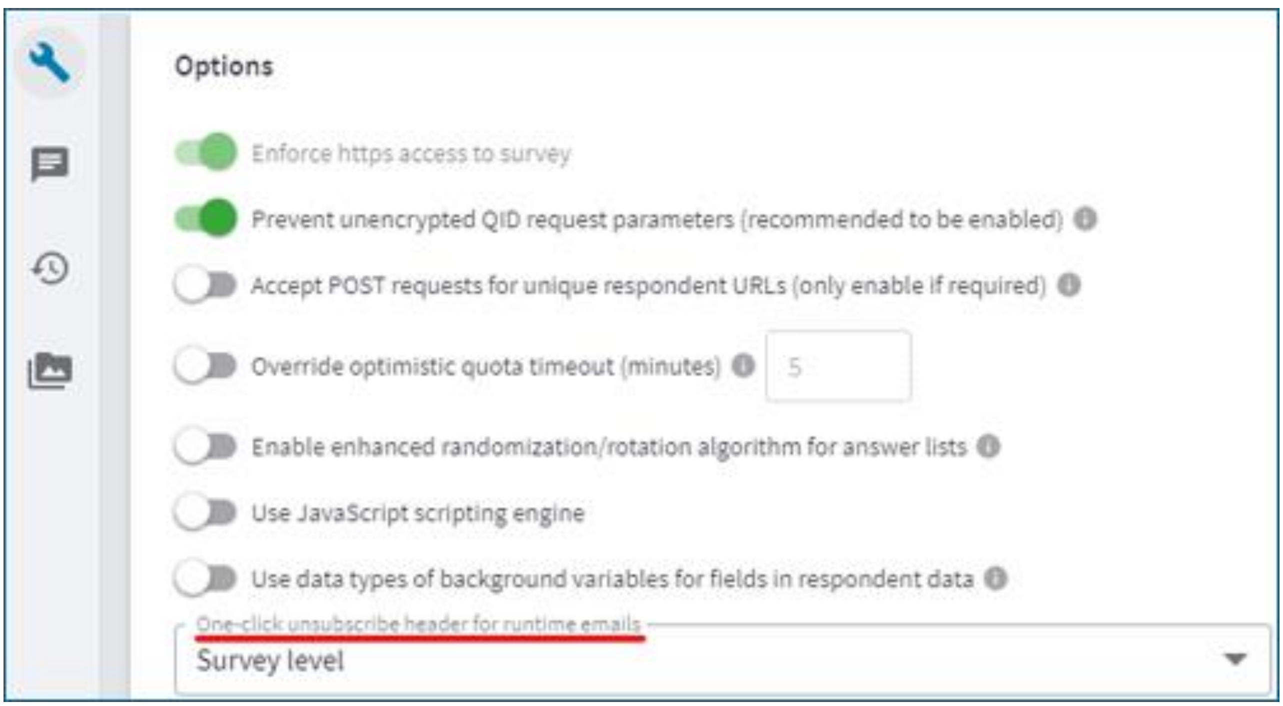
   In combination with the new email opt-out capability we also now include the necessary email header content (as prescribed by Gmail/Ymail to support their one-click unsubscribe features and delivery requirements).

   By default, the system will apply the one-click unsubscribe header for survey level opt-out. However, this can be adjusted to a different level (company or panel) by using the new settings in Survey Designer.

For bulk email invitations/reminders the new setting is located on the bulk email definition:



For emails triggered during the process of respondents completing interviews (via email node or scripts) there is an **independent** survey level setting:



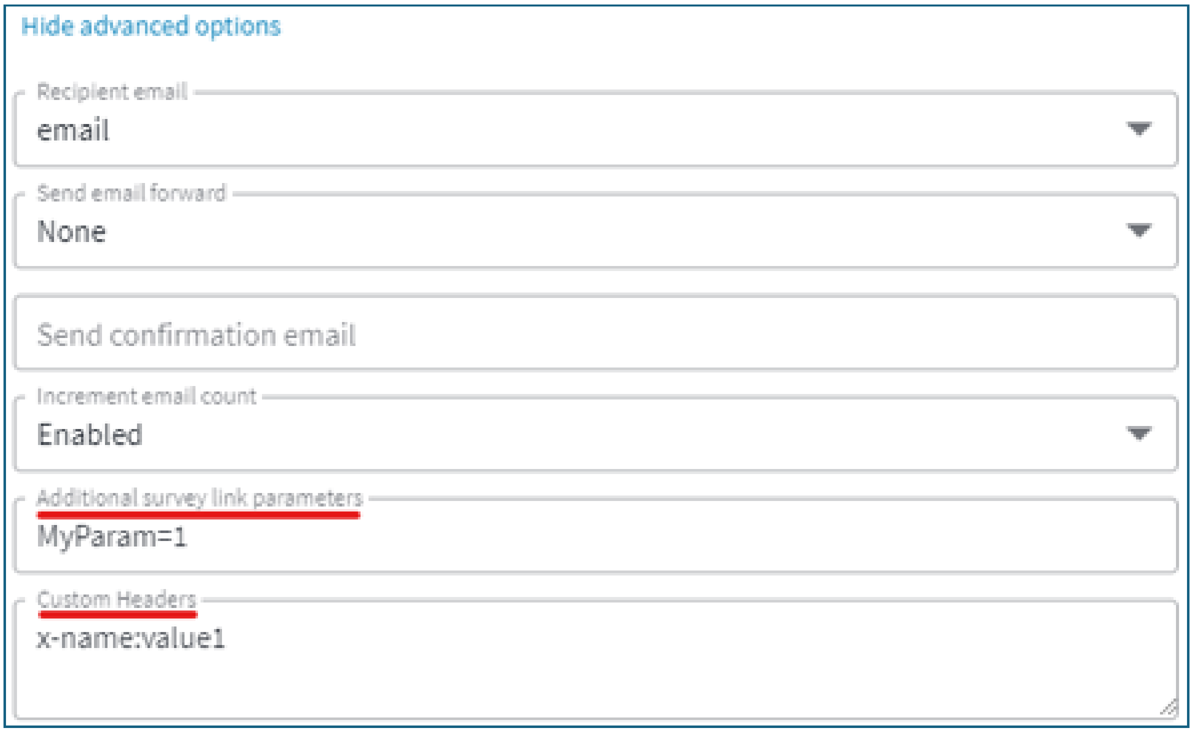
This setting applies to any emails being sent during survey runtime, but it is important to note that this is separate from the bulk invitation use case.

2. <u>Email opt-out capability</u>

The new email opt-out capability has now moved from limited availability (LA) to general availability (GA) on all our SaaS environments. For the time being the new functionality works alongside the legacy Flex extension and shares the same database. We will be taking further steps to be able to sunset the Flex extension.

3. New Advanced Email options

   We've also added new email settings to be able to include either **survey link parameters** (optional params appended to the end of the survey link) or to include **custom information in the email header**.



Forsta Surveys

1. Secure Sample Integration

   We have launched our Forsta Secure Sample Integration (Forsta S2S) with four sample providers:
   - Azure
   - Dynata
   - InnovateMR
   - Sago

What is secure sample integration?

Forsta Secure Sample Integration (Forsta S2S) is a direct server connection from Forsta to a Sample Provider to share a participant's survey status.

Why Forsta S2S?

Implementing Forsta S2S will help eliminate ghost completes. Ghost completes, also known as link jumpers and link manipulators, are fraudulent panelists that manipulate panel redirect links to falsify their completion status to wrongfully claim compensation / rewards.

How does Forsta S2S work?

- Upon terminate/screenout, over-quota, or qualified complete, the MR Survey
- Platform communicates outcome to the Sample Provider via an API call
- Redirect URL to MR Platform does not reference outcome
- Assumptions:
    - API key based on customer's account with Sample Provider
    - Customer sets up in MR Platform project

How to implement?

1. Add a Secure Sample API key
2. Enable Secure Sample Source for Sample Provider

Notes:

- To use S2S user will need to contact sample vendor to get an API key and have enable s2s on the sample side as well.
- Azure is currently the only client that requires an API key to be added to the Secure Samples page at the company level.
- Dynata S2S connection uses a global key, so adding an API key is not necessary.
- InnovateMR and SAGO does not require an API key because our servers' IP addresses are whitelisted by them.

Please check out the Knowledge Base article for additional information: [Configuring Secure Samples]

Forsta Visualizations

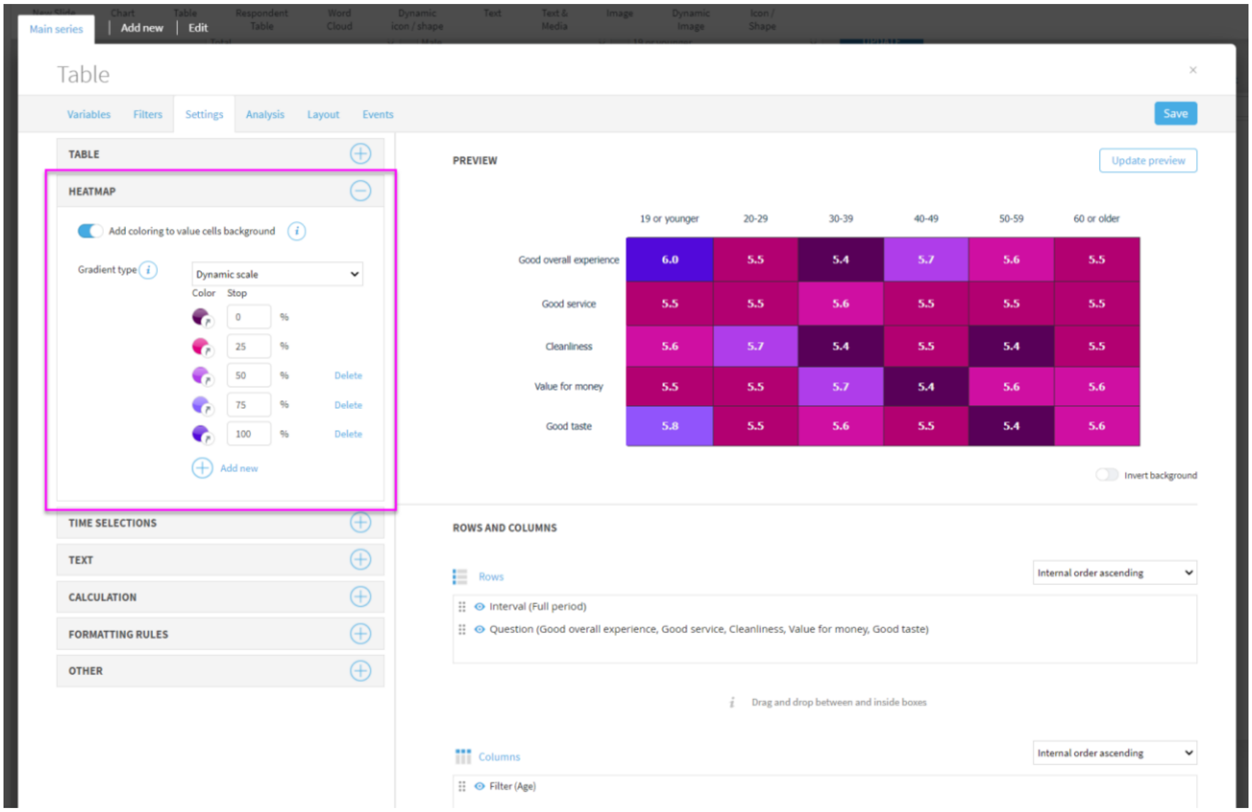
StoryTeller

1. Format low base text

   In both StoryTeller and StoryCreator, we're introduced a new feature that allows you to customize the size and color of the base size warning text when it appears underneath the object due to low base size.

2. Heatmap coloring rules for tables

To create a more comprehensive heatmap, we've incorporated the same cell coloring functionalities used in our Heat Map chart into table cells. This new feature can be found under Settings in the Heatmap section. When enabled, it will override the background color of value cells from background color, formatting rules for cell backgrounds, and significance tests if colored backgrounds have been applied.



There are two different gradient types: Dynamic scale and Fixed scale. With the dynamic scale, the colors are based on the min and max value in the table, and with fixed scale, you will instead set colors to static values.

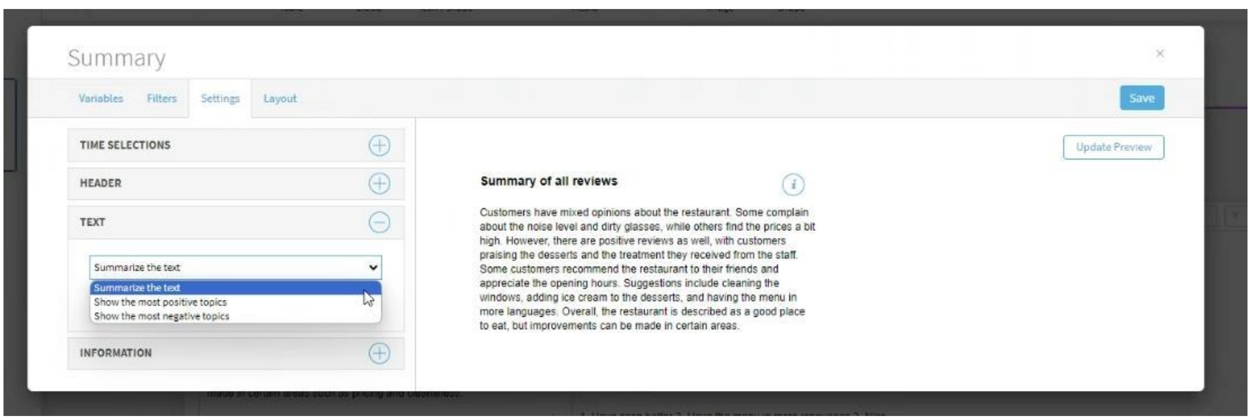
- Reset filter options to Default
  This new feature allows users to reset all filters and revert to the default selections for a specific user or report. By default, this functionality is available in all new projects. For existing projects, you can enable it by reaching out to our Support team.

The icon will appear on the right side of the update button. When clicked, it will reset all filter selections to their default values for that report and user. The filters affected by this button include optional filters (such as filter, variable subsets, time period, moving average, and interval) and the hierarchy filter.

- <u>Hide filters that aren’t connected to Hierarchy node</u>
  When different combinations of hierarchy nodes and filters are connected through our feature ‘Node vs Variable subsets/Filters,’ it can result in filter dropdowns being empty. To address this, we’ve introduced a new option that allows users to choose whether these dropdowns should be displayed (the default behavior) or hidden. You can find this option under Project Settings -> Hierarchical and Optional filters -> Optional filters.

- <u>Summary AI object</u>
  This object leverages AI to either summarize the comments or summarize the most positive and negative topics from your open-ended questions in real time, while also considering your filter selections.

  The text displayed in the object is generated by AI. To ensure consistency between online display and exports, as well as across different users, the system stores the output. It only generates a new request when different data needs summarization, such as when a filter is applied or when there is new active data in the project.



How does this work?

The Summary Generation feature leverages Microsoft Azure OpenAI's natural language processing capabilities to automatically create concise summaries and discover topics in open text survey responses.

For more information on how to create a Summary object, please reference the <u>Release notes</u>.

- Improved filter support in AutoGenerate charts
  To enhance the AutoGenerate slides functionality in StoryTeller, we've made it compatible with looped data and other questions that require in-object filtering. We've added an additional optional step in the panel for creating slides. After selecting your questions and grouping them, you now have the option to add in-object filters to each specific slide. These filters will be applied to all objects within your slide. When adding a filter to the Autogenerate Slides wizard, all available data objects on the slide will have filter options enabled within the object once generated.

Cross Table tool

1. Apply splits to multiple sheets
   You can now modify the splits used by the selected sheets. To do this, simply choose multiple sheets in the workbook panel, click on 'Bulk edit splits,' and select the questions you want to use as splits.

   Note: The bulk edits for splits are only available for the standard layout, where questions are in rows and splits are in columns. All other layouts will be deselected and not get the splits applied.

   For additional information on how to use Bulk edit splits, please refer to the Release Notes

2. Hide base size options in CT
   We've enhanced the suer experience by adding an option to hide the base size for report users. This setting is accessible on the Setup screen for the Cross Table tool. As an administrator, you can choose which options are available for use in the table.

Data management

1. Meta Data Transformation log
   While creating a Meta Data Transformation (MDT), numerous rules and modifications can be applied to the Meta data. However, it can be challenging to track these changes once an MDT is saved. To address this, we've introduced an MDT log. This log allows you to view all the changes made within the transformation, which is particularly helpful when identifying original variables from the source that have been altered during import. Whether you're working with an existing project or need to understand import processes, accessing the log is simple: just download the document from your MDT. All questions are shown in alphabetic order in the excel file.

   What's included in the log?
   All changes saved in the MDT including code name, text labels (other questions and answers), type of variable, if any are mandatory are included. Each piece of information is saved as a row in the Excel file, allowing historical changes to be tracked.

   Tip! Sort your exported file by question code and Date to clearly see the latest changes for each variable.

Data connectivity

1. Support unique Respondent ID based on source
   In Forsta Visualizations, each project requires unique respondent IDs. This ensures precise tracking of specific respondents from data import to reporting. To enhance usability for imports from multiple surveys and support data sets that use alphanumeric respondent IDs, we've introduced a new concept called "respondent groups." With this functionality, you can import the same respondent ID multiple times within a single project, but unique within the group, without clashes, while also adding support for alphanumeric respondent IDs.

   How does it work?
   When using Respondent Groups, you only need to ensure that respondent IDs within the group remains to be unique.
   Forsta Visualizations will generate a new unique Respondent ID for the project, based on the Respondent ID imported alongside your chosen Respondent group. This unique ID will be used consistently throughout the reporting process.

   Once used, the system will automatically create two new questions, Respondent Group and Original Respondent ID. These will store the information imported to the project, and the regular question Respondent ID will be the unique ID created by the system.

   Please refer to the full Release Notes for steps on how to set it up.

Project administration

1. <u>Customer overview page</u>
   We've just introduced a new page that provides an overview of your customer account. As shown in the image below, aggregated metrics such as the renewal date, number of admins, number of report users, number of projects, number o respondents and number of data points are displayed. The new page can be found in the main menu on the left before any projects have been entered.