July

Product Release

Customer Success

August 1, 2024

a PG Forsta company

Welcome!

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

- Crosstab and AI Summary Widget updates in **Studio**
- Ability for interviewers to select dial type in **CATI**
- New File Upload Question type in **Survey Designer**

On **Forsta Surveys** we have expanded on the Campaign Manager exports.

Panel Management has made an important update to the unsubscribe from Project Reminders. Additionally, we have a new Activity Parameter for Survey URLs and Discussion threads within communities can now be pinned by a moderator.

Keep reading to learn about these improvements!

Forsta Plus

Studio

1. Professional and End Users now have direct access to Crosstabs via Survey Fieldwork Report generation

Overview

Previously, users of auto generated fieldwork reports (FWR) only had access to either simple crosstabs (using banners flagged in Survey Designer questions) **OR** a link to Forsta Viz Crosstabs. The latter required additional CRM management and sign-off on alternate data storage by the customer. Now you get native Studio Crosstabs by default. Crosstabs allow end users to slice and dice data without the need for Dashboard Designer input.

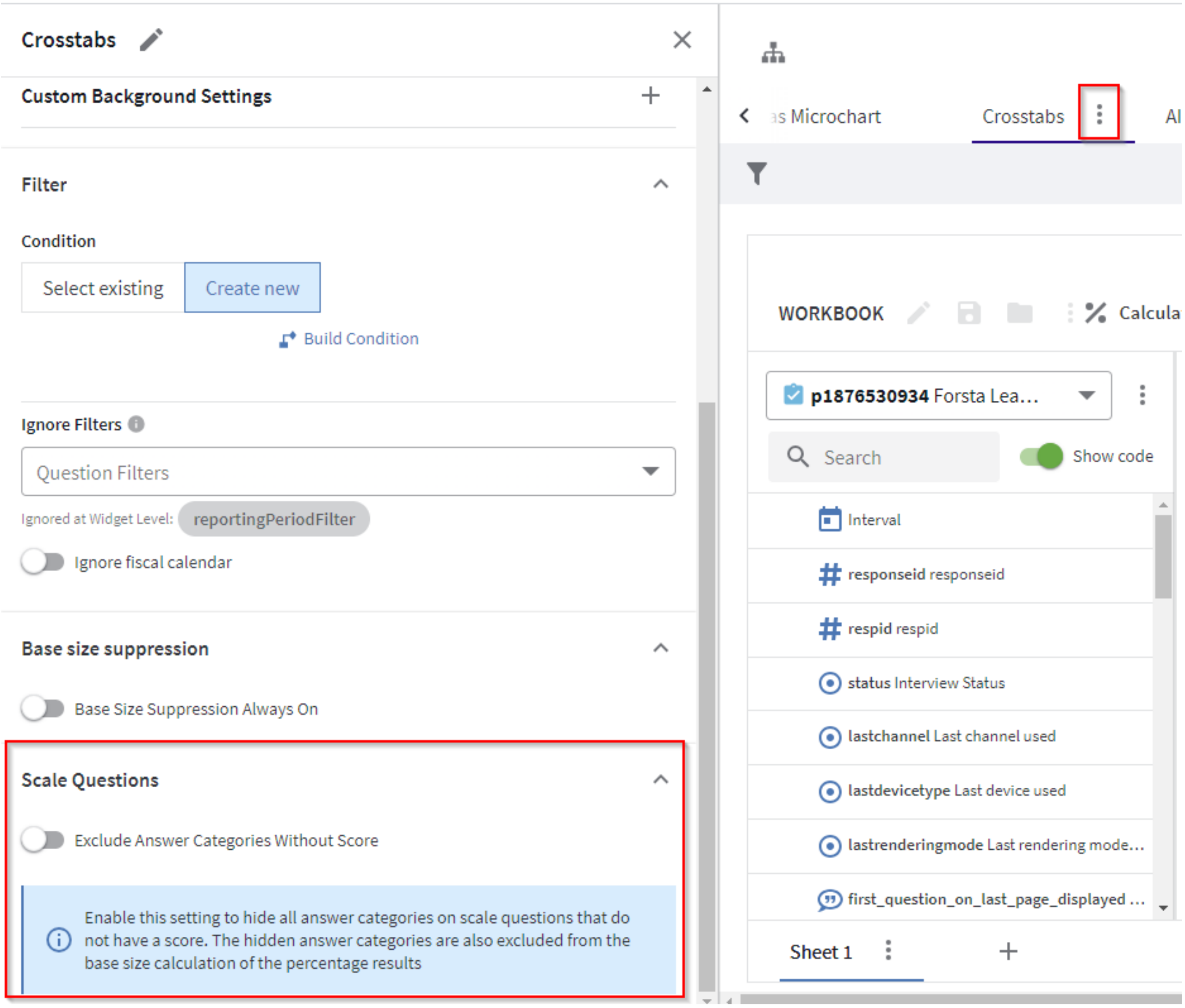
What's New

- Forsta Plus customers, who have not signed up for Forsta Viz Crosstabs in Studio, will now get native Studio Crosstabs when creating new FWR reports via Survey Designer.
- FWR reports will still contain the existing XTAB widget on the page now labelled "Toplines". We know that many customers love the simplicity of this table of questions with banners flagged in Survey Designer.
- *Customers who have signed up for Forsta Viz Crosstabs will continue to receive the Forsta Viz Crosstab tool when generating FWR.

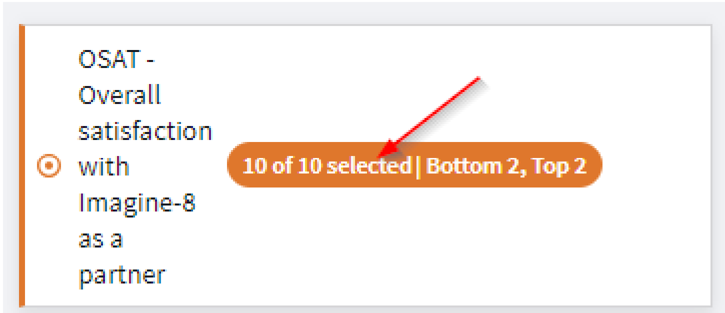
Value

- Native Studio Crosstabs = No links to other tools. Less chance of error. Less complexity.
- No need for alternate data storage.
- Please visit the Knowledge Base article for more info!

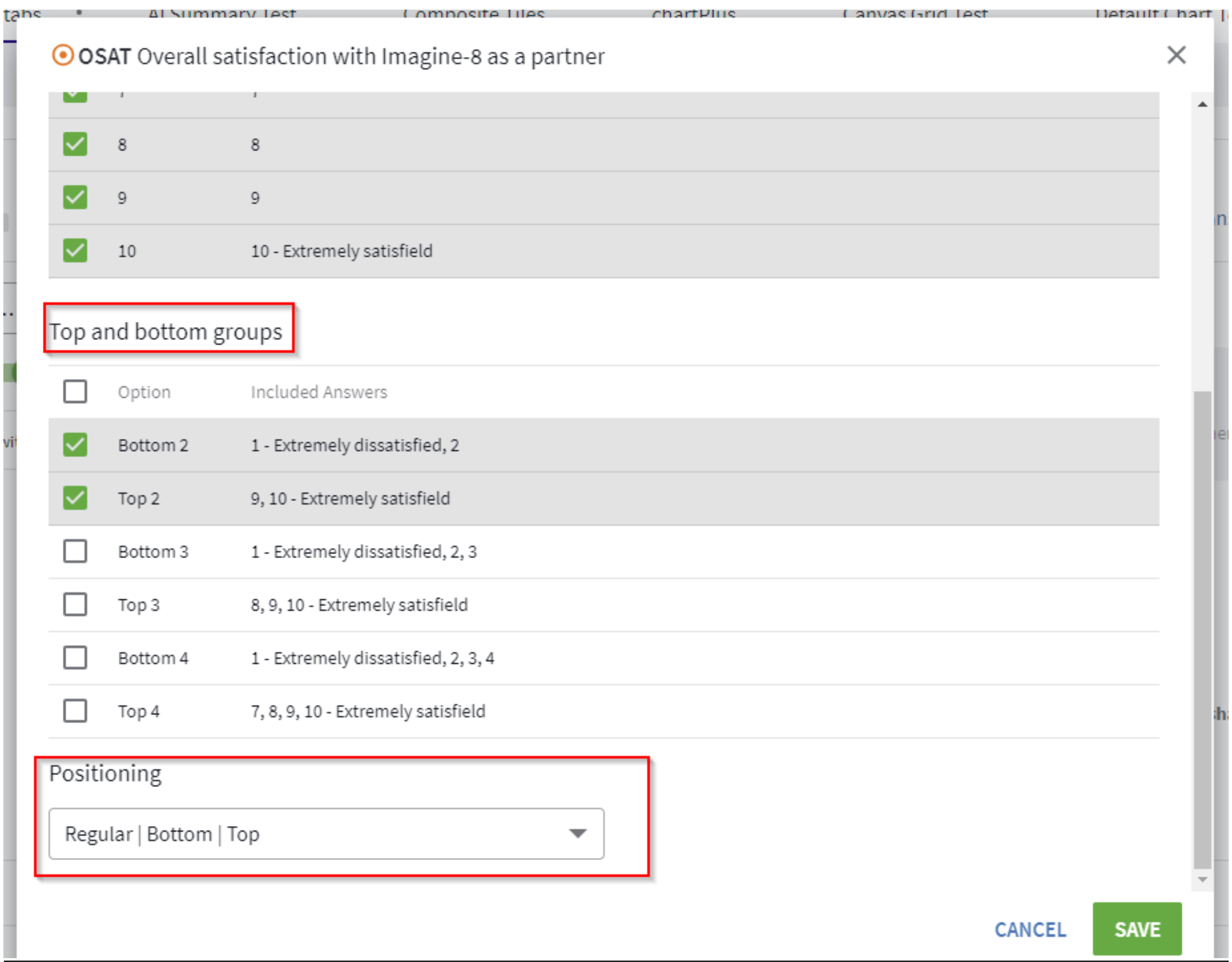
2. <u>Studio Crosstabs updates</u>
   a. <u>Exclude non-scored answers from calculations</u>
      Professional users can now choose to include/exclude answers that have not been assigned scores in Survey Designer, in Crosstabs calculations. This is a page level setting.



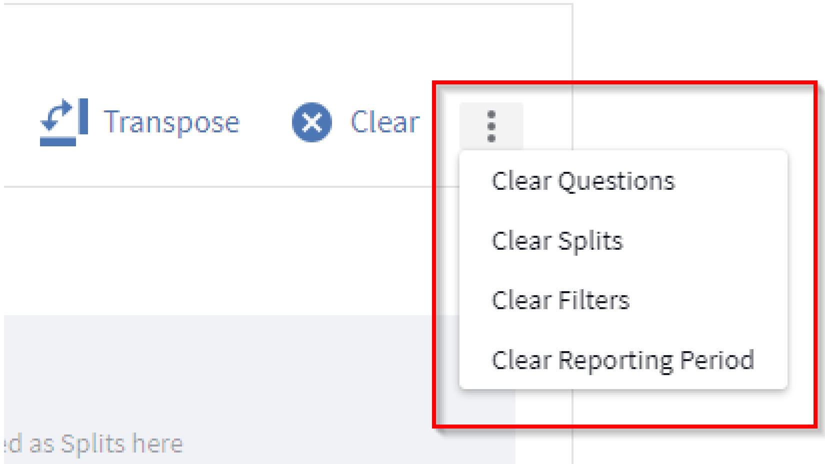
   b. <u>Top/bottom box calculations</u>
      When adding a question with scored answers, a user can choose to add top/bottom box nets to their crosstab and position those calculations as desired. Simply click on the orange pill:



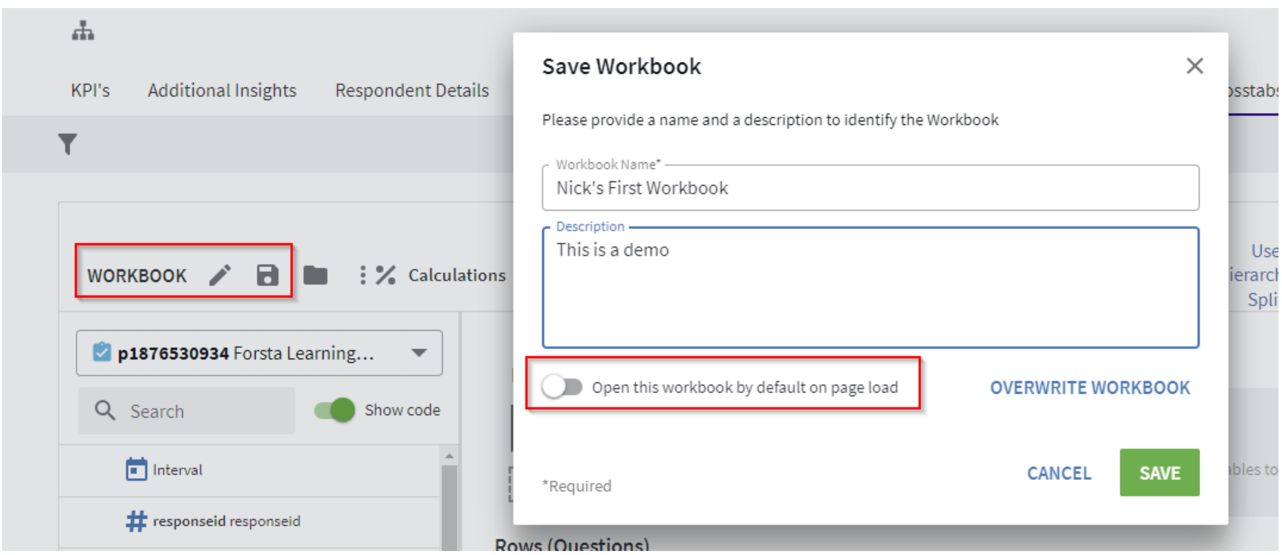
Choose your required top/bottom boxes (the options you are given here depends on the number of answers available) and the position you would like them shown in the table. Then, click Save!



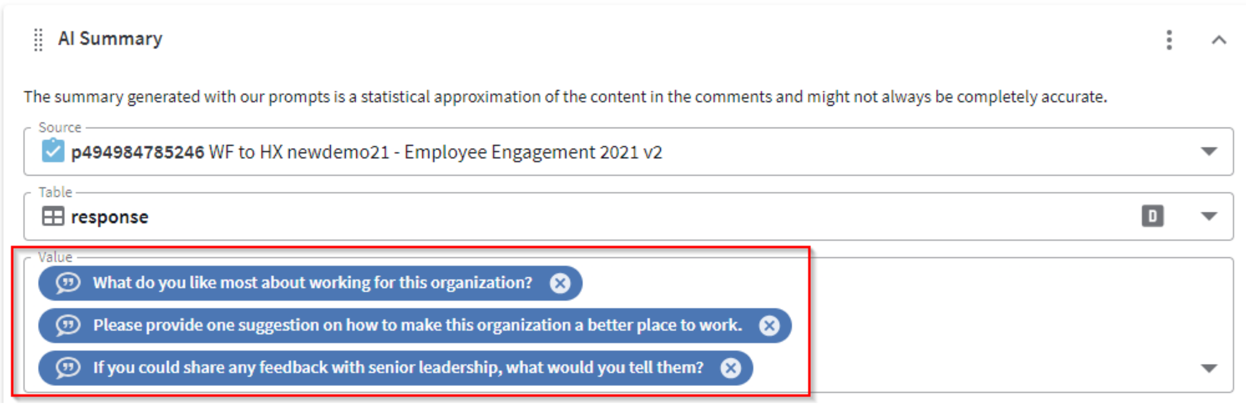
c. <u>Added UI for clearing individual Crosstab elements</u>
Previously users could only clear all their Crosstab selections via the UI. Now you can easily *individually* clear Questions, Splits, Filters and Reporting Period selections.



d. Default Workbooks
Users can now choose to set a saved Workbook as the default that will load whenever you open the Crosstabs page. You can even pin an existing saved workbook!



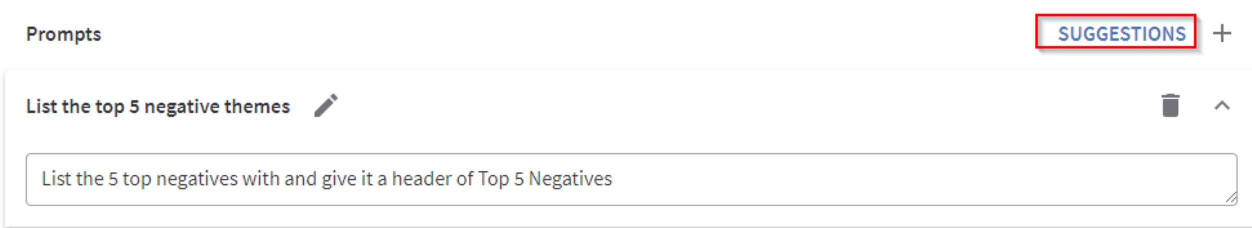
3. AI Summary Widget updates
   a. Support for multiple open-ended questions
   Users can now add more than one open-ended question to the Widget. The comments from **all** added questions will be amalgamated for the AI response. The number of Comments to use, as specified by the user, will be applied to all questions e.g. if they specify "Last 500" comments and add 2 questions to the widget, the query will be performed against 500 comments from ***each*** question (So, 1000 in total).



Value
Great for when questions such as "likes" and "dislikes" are split out in the survey, or simply for when a survey has several general feedback questions.

b. Improved UI
Now, when only one prompt is added there will be no drop-down selector for the End User. The single prompt will be displayed in bold at the top.
Also, the prompt box is now resizable to make it easier for users to input, update and review their prompts.

c. Prompt Suggestions
The most common question we get about the AI Summary Widget is how to word prompts and do we have any examples to get started? Well, we listened! We added a prompt suggestion library of 5 prompts that can be reviewed, added and edited in the widget as needed.



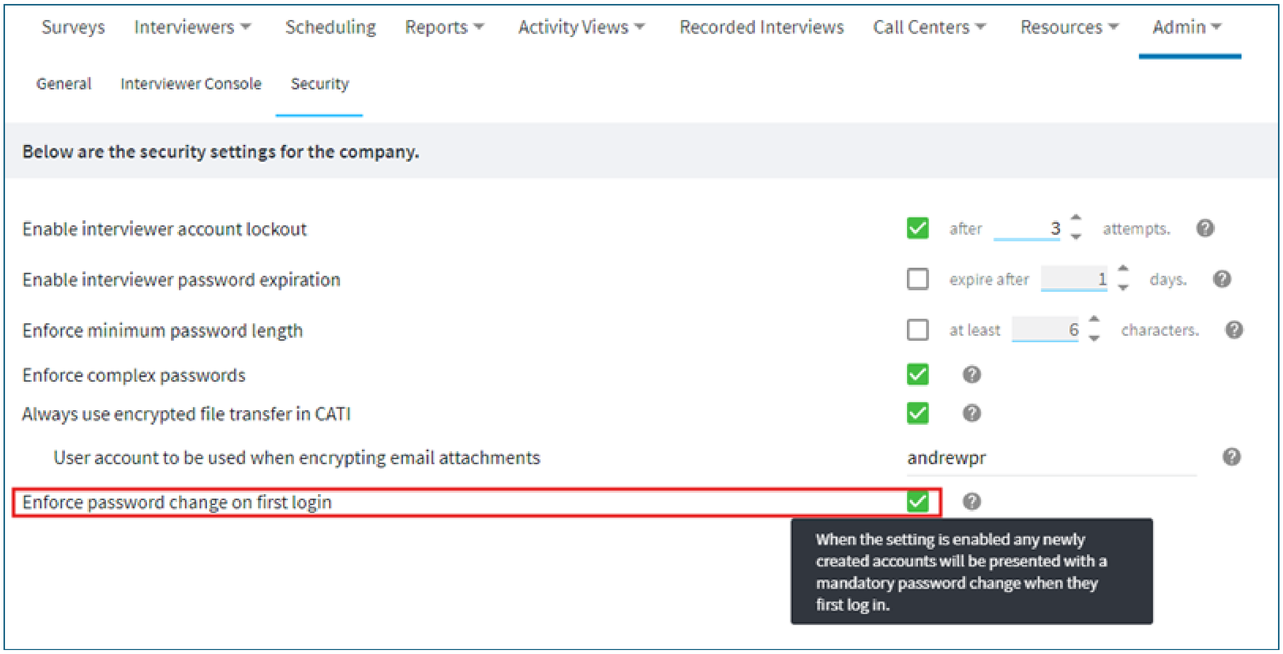
CATI

1. Ability for interviewers to select dial type
The dial type is an interviewer property which determines which type of sample contacts they will be delivered (either landline numbers or cell phone numbers). To help users comply with the US TCPA regulations, if the user chooses to work with cell phone numbers the system will ensure that such numbers can only be dialled manually. By allowing interviewers to choose their own dial type the reliance on supervisors having to maintain this property on behalf of every interviewer can be avoided.

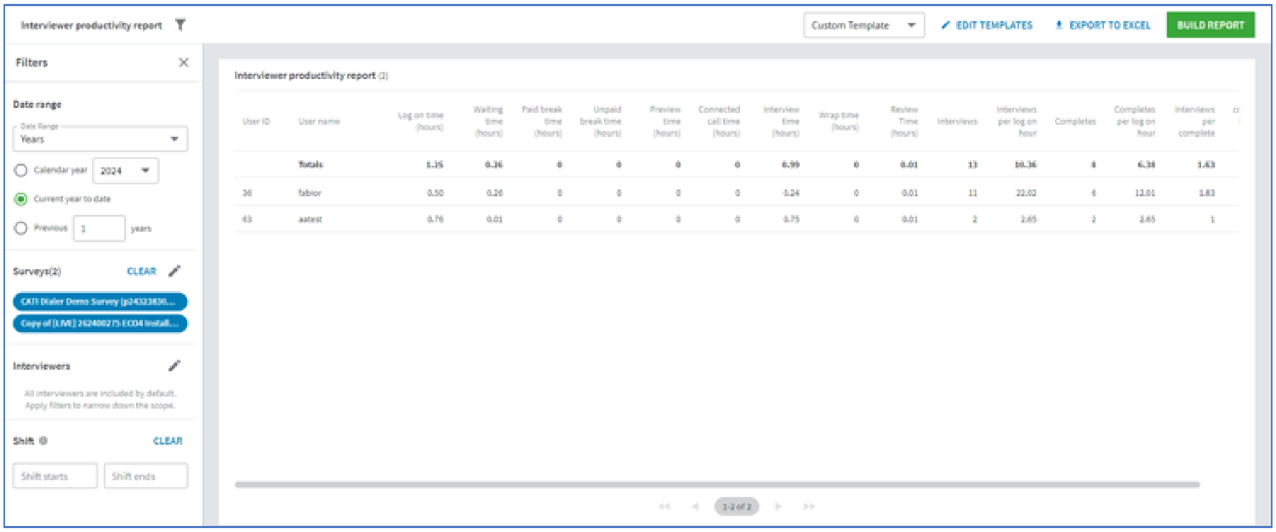
The “Allow interviewers to select dial type” setting can be enabled in the General Interviewer Console Settings. Once the setting is enabled, the interviewer will be presented with the new option to select either Landline or Cell phone.

If the interviewer wishes to adjust their dial type selection whilst logged in, they can do so with the button at the top of their screen to change the interviewing mode.

2. Ability to enforce a password change for newly created interviewer accounts
A new setting can be enabled under the security policy settings for interviewer accounts which will enforce users with newly created accounts to change their password the first time they login.



3. ‘New Style’ Interviewer Productivity Report
Following the recently added 'New Style' **Survey Overview** report we have now extended similar capabilities for the **'Interviewer Productivity'** report.



The key benefits of new style reports include:

- New style reports are no longer physically constrained by width so you can include more columns and longer labels
- The report tables are no longer completely static, you can now sort columns into ascending or descending order
- The filter interface has been improved and now uses filter "chip" to show the applied filter settings in the filter panel
- The applied filters are remembered as you switch between the new style reports
- The Excel export functionality has been re-implemented to provide a cleaning looking table which is easier to work with

To start using the new style report, simply enable the 'New style report' toggle setting in the top right corner of the page.

Note: We will be making several further improvements to the CATI productivity reports over the coming months, such as the addition of a new style Survey Productivity report as well as additional filter options.

Survey Designer

1. New File Upload Question type
   We have deployed a new question type called "File upload" which allows respondents to upload PDFs or Microsoft Office documents during a survey.

   Note
   This question type is available upon request. Please email ForstaPlusSupport@forsta.com to enable this question type. In addition, it is only available to be used in surveys which have the **Javascript engine setting enabled**. Please review the Knowledge Base article with additional information.

Forsta Surveys

Campaign Manager

1. We've replaced "Export Bounce-Backs" in the drop-down menu on the recipient list in Campaign Manager's list view with four separate exports: bounce-backs, blocks, optouts, and spam reports. In addition, the exported list has a new column named "extra" which provides additional details about some statuses; most significantly, it lists the reasons for any additional suppressions.

   Each of these exports are also available via new or updated API endpoints:
   - Get list
   - Get campaign blocks
   - Get campaign bounce-backs
   - Get campaign optouts
   - Get campaign spam reports

Panel Management

1. Unsubscribe from Project reminders
   We have updated the project opt-out link in Panel Management. Now, panelists must click the link and confirm their desire to unsubscribe from receiving project reminders. This link will take the panelist to landing pages within the community to confirm their opt-out for the project.

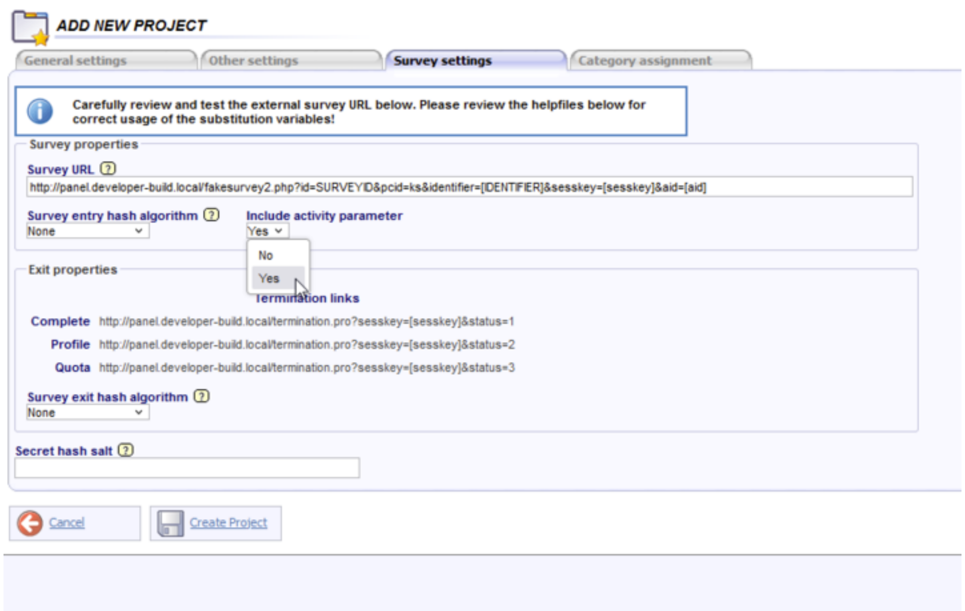
   Reason for the Change
   We implemented this update because some email clients, like Microsoft, scan links, which inadvertently triggers the opt-out link and unsubscribes panelists from project reminders.

   This change will impact clients using the **%OPTOUTREMINDERURL%** or **%OPTOUTREMINDERLINK%** placeholder in your email invitations. This placeholder is added to emails by default but can be removed if desired.

   Please review your "**Confirm unsubscribe from a study"** and **"Successfully unsubscribed from a study"** landing page within your communities to make any necessary branding changes to these pages prior to the full roll out of the updated Project Opt-out behaviour.

   Note
   The change to the Project Opt-Out is currently disabled to give our clients sufficient time to adapt to the new standard and make any chances necessary to the landing pages. **If you wish to enable this feature before its official rollout in a month (August 21st, 2024)**, please reach out to our Support team at SurveySupport@forsta.com.

2. <u>New Activity Parameter</u>
   We've added support for a new placeholder to the "Survey URL" property in the project properties. This can be included their projects as an additional parameter in the survey URL to prevent cheating attempts in projects that allow panelists to complete multiple times. When this is active, the value of that parameter must be present in the exit link for this participation to be counted.



3. <u>Sticky Discussion Threads</u>
   Moderators now have an option to make their discussions threads "-Sticky-" When selected by a moderator, those discussion threads will be pinned to the top to show up before anybody else's.