



August

Product Release

Customer Success

September 3, 2024



Welcome!

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

- Several updates to our **Discussions** platform
- Prompt Suggestions for the AI Summary Widget in **Studio**
- A new version of the **Mobile Panel app**
- New UI for inserting links in HTML emails in **Survey Designer**
- New style Survey Productivity reporting for **CATI** users

In addition, Custom Topics has been added to **InterVu & Live Video**'s Transcripts+ suite of researcher tools, further community enhancements were made to **Panel Management**, caption support has been added for the Video Player on **Forsta Surveys** and **Forsta Visualizations** has Storyteller and Data updates!

Keep reading to learn about these improvements!

You can also now review previous months' product updates at any time via the knowledge base!

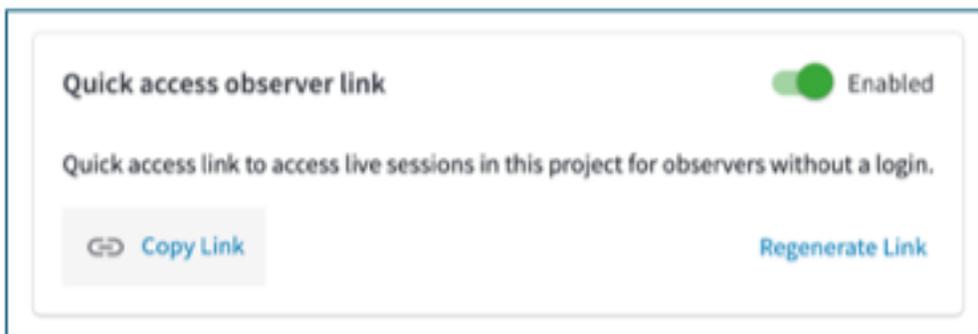
<https://pgforstaproductupdates.zendesk.com/hc/en-us/p/ProductUpdates>

Forsta Plus

Discussions

1. Quick Access Observer

The Quick Access Observer feature streamlines the process of allowing Observers to join sessions effortlessly. Moderators can generate quick access links, and Quick Access Observers can join sessions via the links. This means that users no longer need to be Professional Authors or End Users to observe Discussions projects. Quick Access Observers must be allowed access into a session by a moderator each time. The link can be disabled and regenerated if need be.



2. Updated Waiting Room

a. Redesigned for better user experience

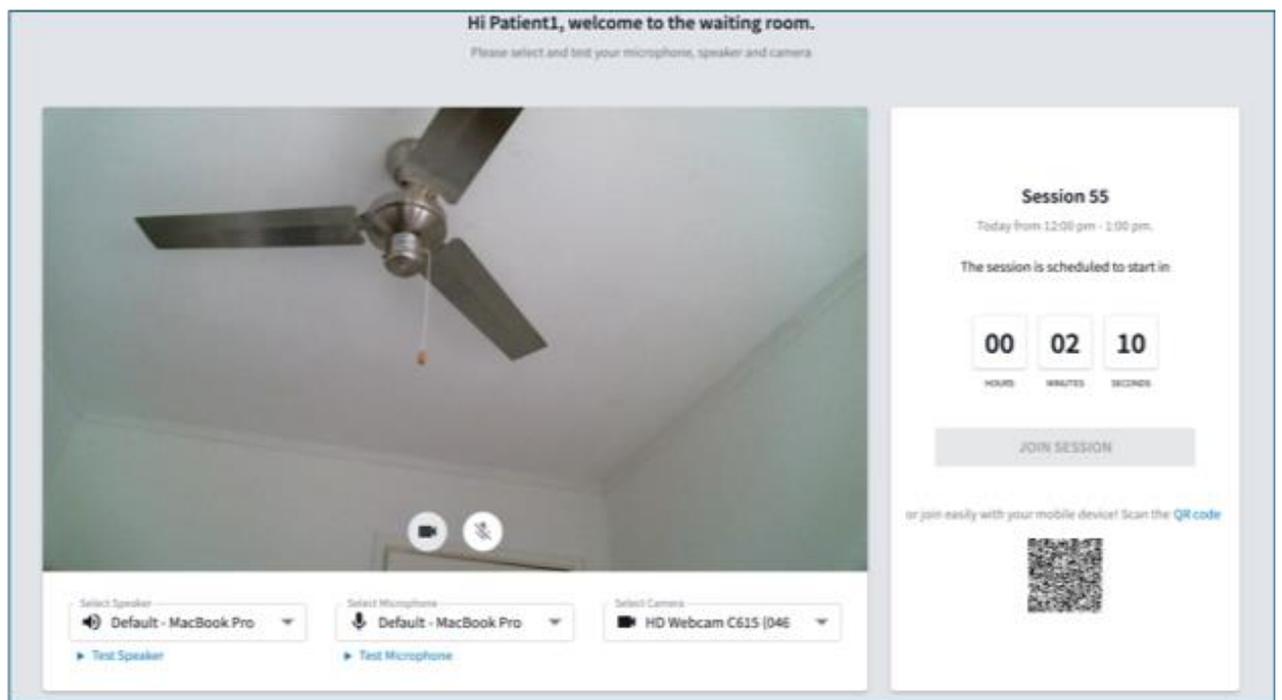
Users are now greeted with a welcome message and provided with clear instructions on allowing access to their microphone and camera. A countdown timer indicates when the session is scheduled to start.

b. Audio and Video Settings

Users can now configure their audio and video settings directly from the waiting room. Options to test microphone and speakers are available to ensure proper setup before joining the session.

c. QR Code for Mobile Access

A new QR code feature has been added to the waiting room. Users who prefer to join the session on their mobile device can scan the QR code with their phone. The QR code will direct users to install the Forsta Discussions app on iOS or Android and join the session seamlessly.



3. Individual Chat

Discussions now supports individual direct chat messaging between moderators and observers as well as between moderators and participants.

- Moderators can message observers, and vice-versa
- Moderators are also able to start messages with individual participants (respondents)
- Observers cannot chat with participants
- Participants cannot start chats with moderators or other participants

4. Open Enrollment for Participants

The Open Enrollment for Participants feature allows participants to self-enroll in available sessions within a project *without needing to provide Personally Identifiable Information (PII) in advance*. This provides participants with greater flexibility and autonomy in selecting sessions that fit their schedule.

5. Session Quick Link

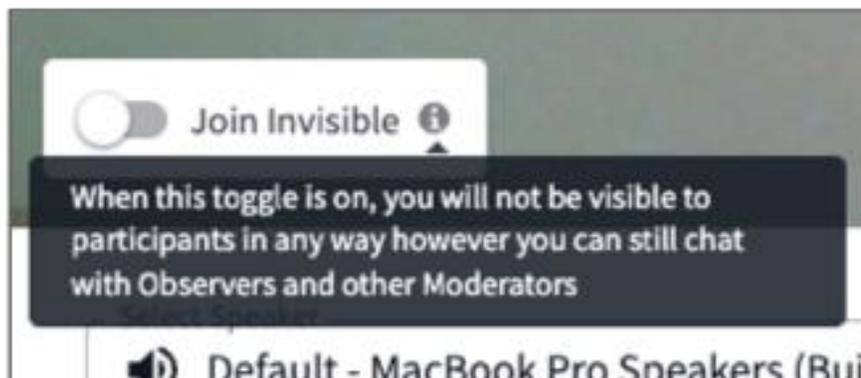
The Session Quick Link feature allows moderators to generate a unique URL for a specific session, providing participants with direct access to that session. This feature can be used for both upcoming and ongoing sessions.

- Moderators can generate a Quick Link by navigating to the 'Manage Sessions' section within the Project Dashboard and clicking on the three vertical dots (⋮) next to the session. The 'Copy Session Quick Link' option will generate and copy the link for distribution.
- During an ongoing session, the Quick Link can also be copied by clicking on the 'More' button (⋮) within the session interface
- When participants click on the link, they are prompted to enter their Display Name and Email Address. If the session is ongoing, they join immediately but await moderator approval. If the session is upcoming, they receive a confirmation and email.

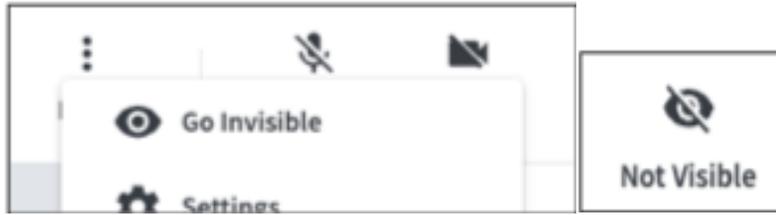
6. Invisible Moderator

The Invisible Moderator feature allows moderators to join a session without being visible to participants. This enables moderators to manage sessions, assist with troubleshooting, and provide support discreetly.

- Moderators can activate Invisible mode before entering a session by toggling the 'Join Invisible' option on the A/V setup screen.



- Once in the session, moderators can click on the 'Not Visible' eye icon to become visible. A modal warning message will confirm this action
- Moderators can return to Invisible mode at any time by clicking on the 'More' button (⋮) and selecting 'Go Invisible.'

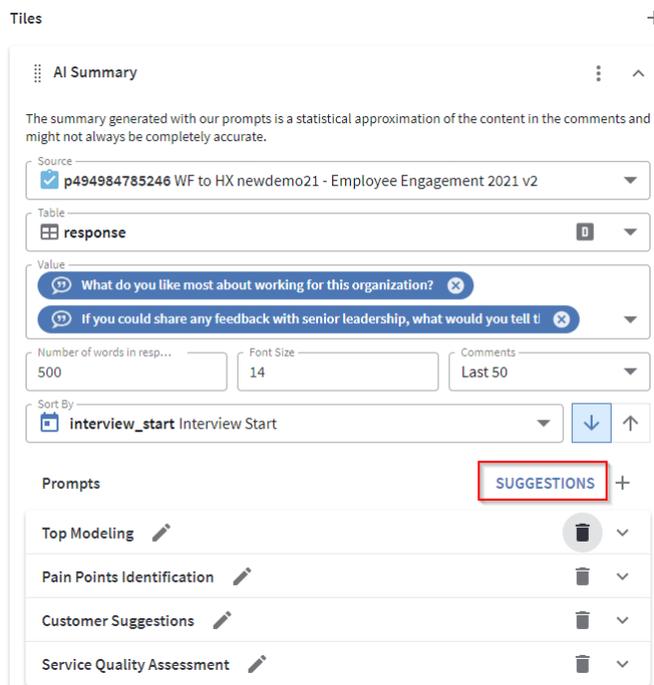


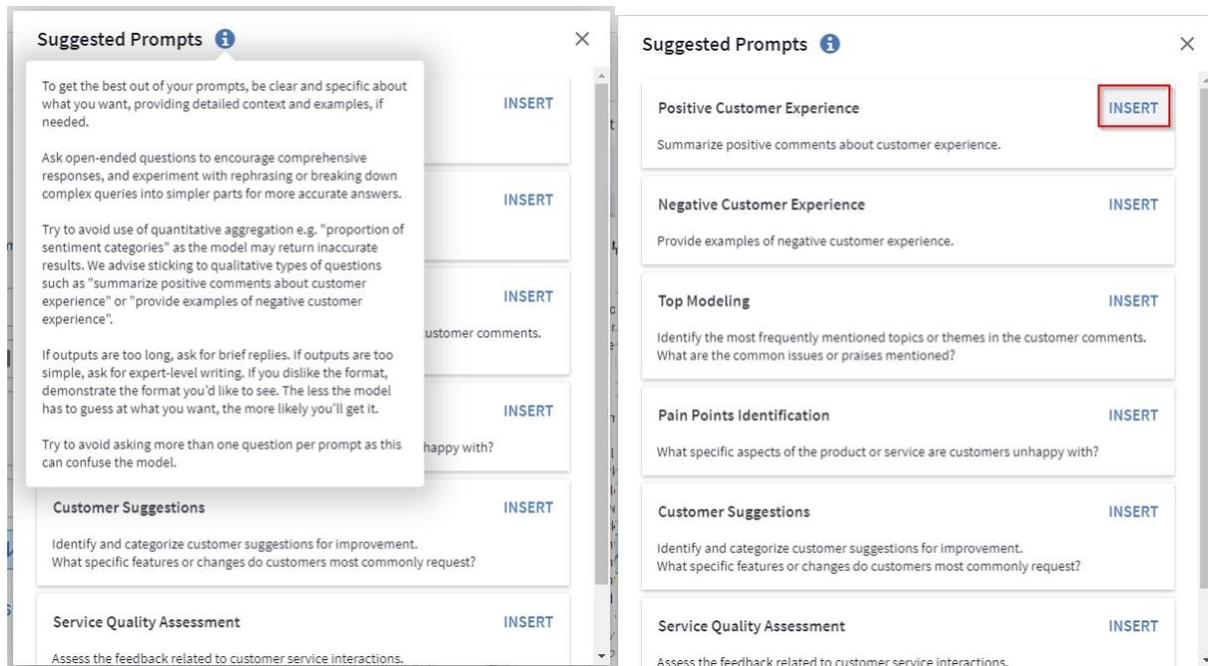
*Once available later this month, please refer to the full Release Notes for additional updates and information.

Studio

1. AI Summary Widget – Prompt Suggestions

There are now 6 out of the box prompts and updated best practice guidance. These prompts can be reviewed, added and edited in the widget as needed.





*Please refer to the Knowledge Base for more information: [AI Summary Overview](#)

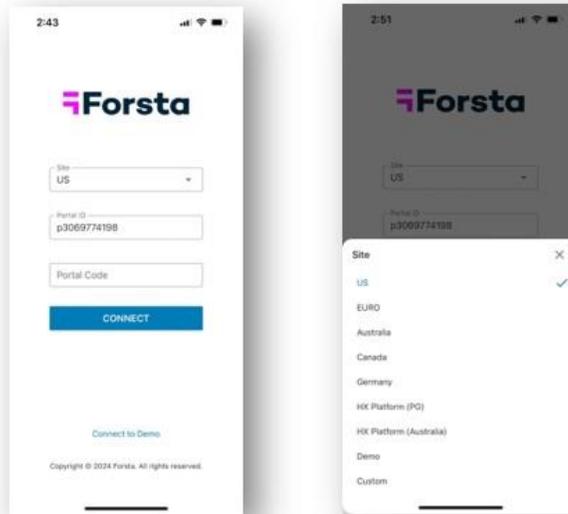
Mobile Panel app

A new version of Forsta Mobile Panel app is now available! The noteworthy improvements include:

- Adoption of shared mobile UX and panel login experience
- Dynamic site selection supporting all Forsta Plus sites
- Improved app performance and 50% smaller app size

The app is also brandable! Download it here:

https://play.google.com/store/apps/details?id=com.confirmit.panelApp&hl=en_CA



Survey Designer

1. New Functionality for inserting links in HTML emails

The toolbar button to insert a link into the HTML email message body has been enhanced to cover the three main use cases:

- To insert the survey link (^slink^)
- To insert an unsubscribe link
- To insert a link to a URL

Choose the Link button on the HTML message body toolbar to use the updated UI:



Then simply choose the tab for the type of link you wish to insert and provide the desired display text for the link:

Insert / edit link ×

Survey link
Unsubscribe link
URL

Unsubscribe link label

Link to unsubscribe from this survey: ^OptOut:ProjectLink^

Link to unsubscribe from this panel: ^OptOut:PanelLink^

Link to unsubscribe from this company: ^OptOut:CompanyLink^

CANCEL
SAVE

For an unsubscribe link, it is necessary to ensure that the correct type of link is selected according to the desired opt-out list level.

Note

The toolbar button used to insert piped values can no longer be used to pipe a survey URL (it is now reserved solely for piping respondent values, whilst the Link button can now be used to insert a survey link).



2. New API functionality for programmatic administration of domain and email blocklists
The REST based 'Notifications' API has been extended to provide support for adding and removing domain name or email address entries in the blocklists.

CATI

1. New style report for Survey Productivity

The report provides a breakdown of status counts per Interviewer for the specified time period. The report is presented in a format which allows the Interviewer stats to be expanded or collapsed.

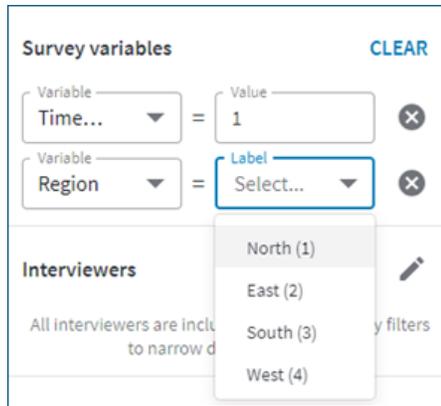
When there are multiple surveys in the report, each survey has its own table which can be selected using the survey drop-down list. Currently if surveys are selected for the report but there was no active interviewing done in the specified time period for the report, they will still appear in the survey drop-down list. We plan to improve this by suppressing the list to only include surveys that have been actively worked on.

Note

This report does not currently provide the Excel export option, although this will be coming soon!

2. Ability to select report filter variables using a drop-down list in new style reports

This filter option is only available when the report is based on a single survey (since not all surveys may share the same variables). The filter can be used with any numeric or single type variables from the survey that have the CATI filter property. When setting a filter on a single type variable the values can be entered by selecting from a drop-down list which shows answer labels and the respective codes (in parenthesis). It is now possible to provide an unlimited number of filters (old style reports were limited to two).



3. Ability to change the quota balancing priority in the new style quotas tab in the CATI supervisor UI

When quotas have the quota balancing feature enabled (see settings in Survey - General tab) by default all quota cells will be balanced evenly by the systems balancing algorithm. However, users may optionally set quota balancing priorities for selected quota cells to give more or less priority to them.

See the Knowledge Base article for more information on quota balancing priority: [Setting up a Balancing Priority for Quota Cells](#)

	Percentage	Remaining	In progress	Optimistic limit	Balancing priority
1	100%	0	0	1	Medium
1	100%	0	0	1	High
1	100%	0	0	1	Medium
1	10%	9	0	1	Medium
1	10%	9	0	1	Medium
1	10%	9	0	1	Medium

4. Ability to join call history API with callhistory loop records via common identifier

The CallAttemptCount system variable that is available in all CATI surveys now has its current value logged in the CATI call history data (both for connected and non-connected calls) and is exposed in the call history endpoint in new public CATI REST API.

Forsta Surveys

1. Video Player element now supports captions
 - Version 3 of the Video Player is now available

[Learn more on our Knowledge Base: Video Player Element](#)

Panel Management

1. Emojis are now supported on Community Discussion boards!
2. Quick poll is now available to be added to community landing pages.
3. Setting different external URLs and icons for multiple languages in community menu builder is now available.

InterVu & Live Video

1. Custom Topics through Transcripts+

Background

This innovative capability allows users to define and manage their own topics tailored specifically to the needs of their research projects. Leveraging advanced AI, the feature offers **Smart Topic Detection** that goes beyond simple keyword matching. It accurately identifies and categorizes topics even when they are not explicitly mentioned in the text, enabling a deeper and more nuanced understanding of the content.

Additionally, the feature includes **Automatic Tagging** of these identified topics within the session transcripts, enhancing the organization and analysis of session data. With Custom Topics, users can achieve a higher level of precision and relevance in their research. Whether you're looking to improve the searchability of your content, identify emerging trends, or focus on the most pertinent segments of a session, this feature offers the flexibility and control needed to unlock the full value of your recorded speech.

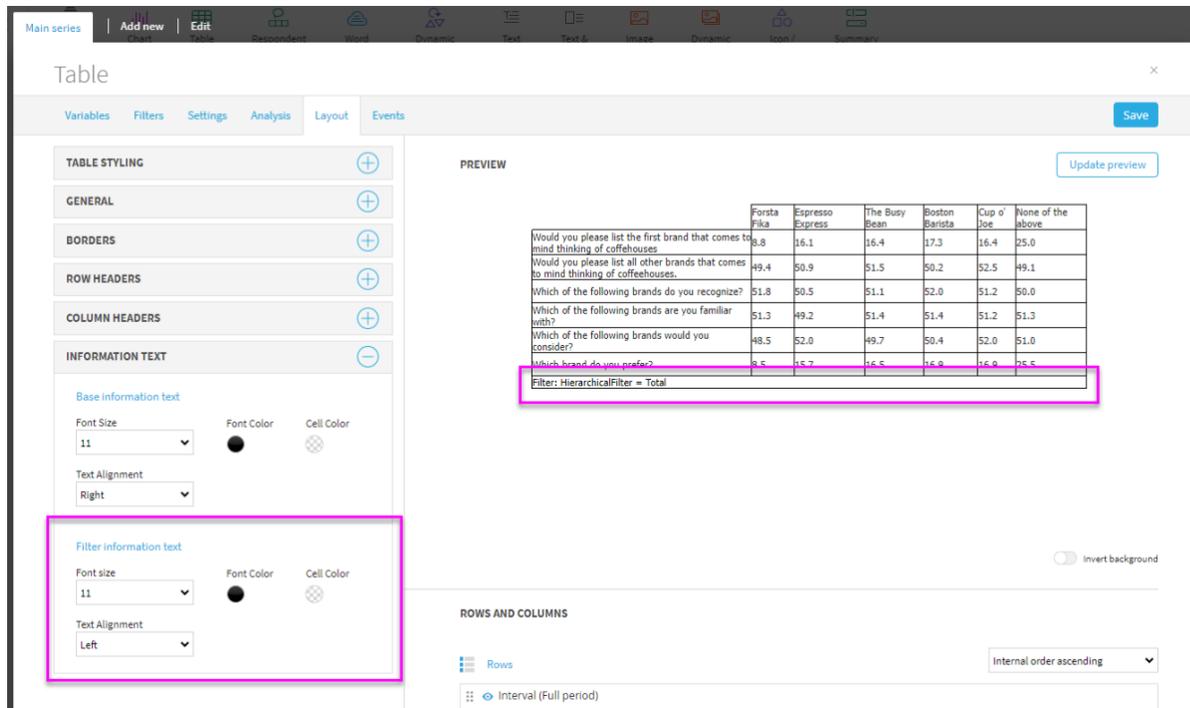
[For additional information on accessing and configuring Custom Topics, please refer to the Release Notes once they're available later this month.](#)

Forsta Visualizations

Storyteller

1. Filter information text in Tables

In StoryTeller, we've added a new feature that allows you to display filter text within table objects. You can customize the font size, text color, background color, and text alignment. This feature is enabled by default for new table objects.



2. Disclaimer text and Refresh button in Summary Object

We've added a disclaimer text to the Summary objects. This text is enabled by default and appears as a footer in the object. This text can be modified, moved into a tooltip or removed completely. We also added the option to refresh the object to get a new analysis for selected filter. In a future release the option to select the position of the Refresh button will be added.

3. Additional sorting options for categorial questions in Respondent Table

To enhance the appearance of our Respondent tables, we've introduced the ability to specify the sorting method for each categorial column when using column header sorting. The new options available are "Answer ID" and "Sort order." The existing sorting method, "Alphabetical," remains the default option.

4. StoryTeller Export – Create multiple exports based on filter

We've added the option to generate multiple exports based on filter selections, just as hierarchy filters can produce multiple exports at once. To enable this functionality, select the filters you want to use as export filters within StoryTeller.

Data

1. Add "Loop iterator" to loops in import

As a first step to simplify the use of looped data within our data objects, we've developed a method to set the "Loop Iterator", the question that should be used as a filter, during the import process. This ensures accurate calculations in the objects and clarifies which questions are included in a loop.

2. Additional information available in Activation log for Duplicated Respondent ID's message

The option to download the full list of Respondent ID's in case of Duplicates or Missing Respondent ID's from our Activation log.

The screenshot displays the rta HX Platform interface. On the left, the 'Activation Log' shows a table of activation attempts. The entry for Activation ID 13 is marked as 'Failed' and includes a message 'Duplicated Respondent IDs' highlighted with a pink box. The table columns are: Log, Step, Status, Start time, End time, Duration, and a column for the message. The right side of the screenshot shows a data table with columns 'Respondent ID' and 'Batch IDs', with a pink box highlighting the data rows.

Log	Step	Status	Start time	End time	Duration	Message
13	Preparing data	Failed	2024-07-16 2:47 PM	2024-07-16 2:47 PM	00:00:00	Duplicated Respondent IDs
12		Failed	2024-07-16 1:47 PM	2024-07-16 1:47 PM		
11		Succeeded	2024-02-29 10:04 AM	2024-02-29 10:04 AM	00:00:07	1
10		Succeeded	2024-02-29 10:04 AM	2024-02-29 10:04 AM	00:00:04	1
9		Succeeded	2024-02-29 10:03 AM	2024-02-29 10:04 AM	00:00:12	1
8		Succeeded	2024-02-29 10:03 AM	2024-02-29 10:03 AM	00:00:10	1
7		Succeeded	2024-01-08 4:33 PM	2024-01-08 4:33 PM	00:00:13	
6		Succeeded	2024-01-08 4:24 PM	2024-01-08 4:24 PM	00:00:11	
5		Succeeded	2024-01-08 4:23 PM	2024-01-08 4:23 PM	00:00:13	
4		Succeeded	2024-01-08 4:23 PM	2024-01-08 4:23 PM	00:00:08	1

Respondent ID	Batch IDs
10001	1,2
10002	1,2
10003	1,2
10004	1,2
10005	1,2
10006	1,2
10007	1,2
10008	1,2
10009	1,2
10010	1,2
10011	1,2
10012	1,2
10013	1,2
10014	1,2
10015	1,2
10016	1,2
10017	1,2
10018	1,2
10019	1,2
10020	1,2
10021	1,2
10022	1,2
10023	1,2
10024	1,2
10025	1,2
10026	1,2
10027	1,2
10028	1,2
10029	1,2
10030	1,2