October

# Product Release

Customer Success

October 30, 2024

a PG Forsta company

Welcome!

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

- Workbook sharing in **Studio Crosstabs**
- New email opt-out administration for Forsta Plus Panel users in **Survey Designer** and a new "Open Assist" question type
- A new version of **Forsta Go**
- A new version of **CAPI** App
- New functionality for **CATI** Supervisors
- Ability to import SPSS into the Hub.
- Updates in Contact Database Sampling
- **Digital Diaries** site migration and new features!

In addition, distribution on multiple samples is possible in **Panel Management.**

Keep reading to learn about these improvements!

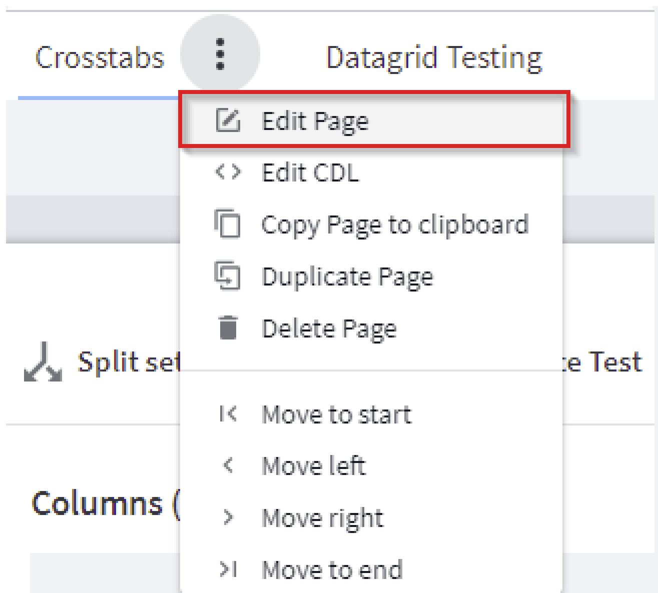
You can also now review previous months' product updates at any time via the knowledge base!

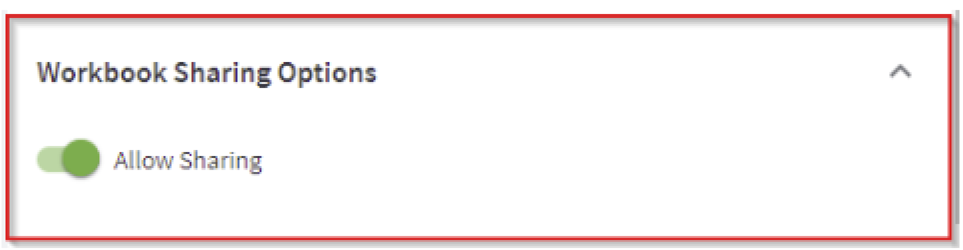
https://pgforstaproductupdates.zendesk.com/hc/en-us/p/ProductUpdates

# Forsta Plus

## Studio Crosstabs

1. **Workbook Sharing**
   Studio Pro users can now enable Workbook Sharing for End Users via the Crosstabs page settings:




Once enabled, end users can choose to Share Workbooks they have open (provided there are other end users with access to the report). They can share with any other user that has "View" access to the report, from any end users list associated with that report. The users who have been shared with will see the Workbook in the "Shared with You" tab of their workbooks list. They can then open and view the Workbooks.

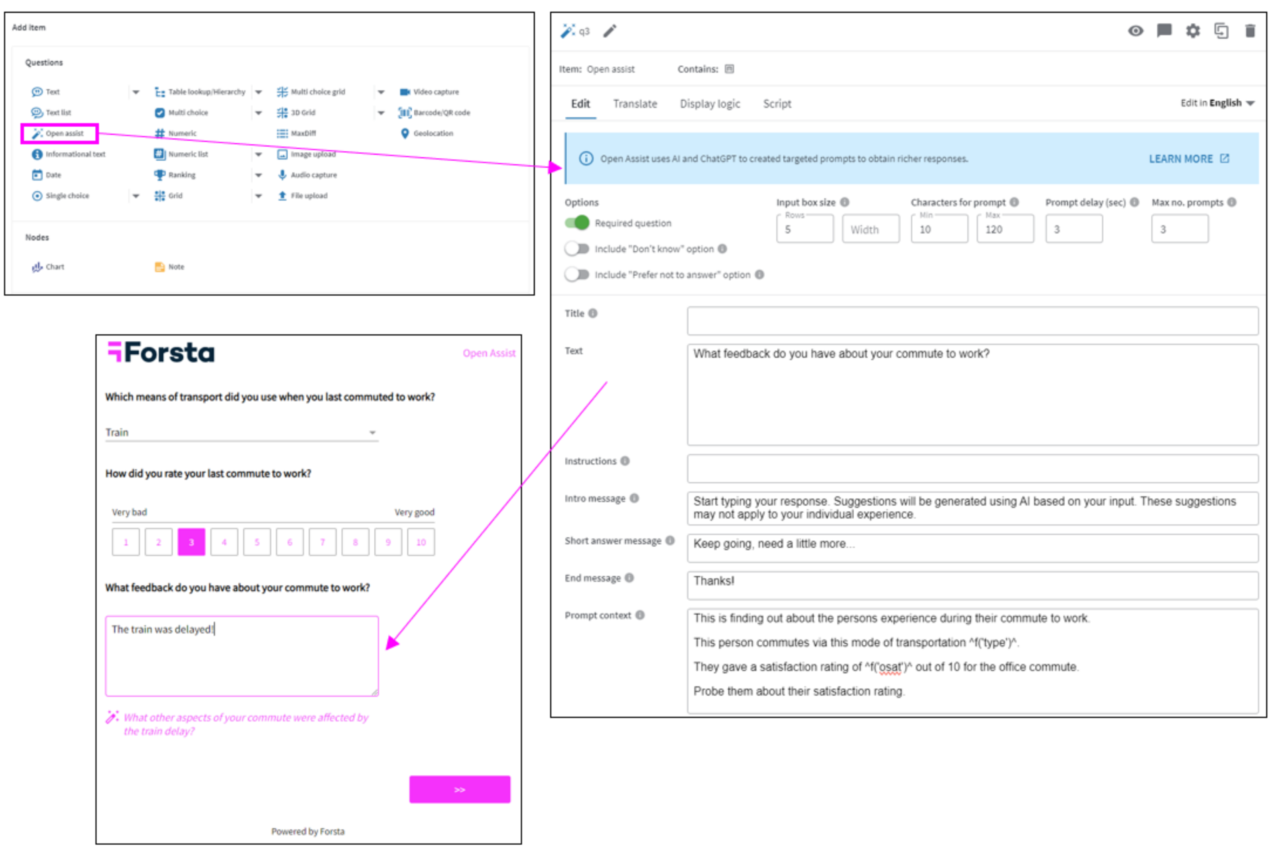
# Survey Designer

## 1. Email opt-out administration for Forsta Plus panel users

- For any survey which is linked to a panel you will now see a new button on the side bar of the 'Deployment' screen in Survey Designer. The button will open a UI where you will be able to see and administer the list of email addresses currently contained in the opt-out database for respondents who **opted out at the panel level**. From here it is possible to add/remove entries and edit the texts displayed on the confirmation page (subject to user permissions)
- This replaces the need to use the old email opt-out Flex Extension in the Panel use case (thus reducing the need for users to waste time switching back and forth between legacy Professional Authoring interface and Survey Designer.

## 2. New Open Assist Question type

- We've deployed a new "Open Assist" question type, which uses Gen AI to elicit richer verbatim responses from survey participants.




- With this new question, you have the ability to control a few aspects of the triggering criteria:
  - Min and max number of characters to trigger/stop prompting
  - Delay in seconds when typing stops before Gen AI is invoked

- Max number of prompts to be displayed

— Additionally we have several text fields that can be configured to tune the experience:

    - Intro message: this will be displayed as soon as the question appears, and we recommend mentioning as a disclaimer that Gen AI is used
    - Short answer message: this will be displayed if the user hasn't entered enough characters yet to invoke Gen AI
    - End message: displayed when the max number of characters or the max number of prompts have been triggered
    - Prompt context: this powerful field allows users to provide additional context to prime the Gen AI with additional details and context that can ensure a more informed set of prompts being generated. This can include piping to provide more personalization of the prompt, including dynamic questions on a triggered page.

— As with almost all new capabilities that we bring to the survey platform, the feature is only available to be used in surveys which have the **JavaScript engine setting enabled**, Open Assist questions cannot be added otherwise. Some additional considerations regarding using this question:

    - The survey must be using a responsive survey layout
    - The survey must have JavaScript engine enabled
    - It is not supported for CAPI/AskMe survey modes
    - Gen AI will try to provide a prompt in the language that the respondent is answering the question.
    - Right now, the prompts are not stored anywhere, they are displayed to the participant only, we may consider enhancing this in the near future.

The Knowledge Base has been updated with details here.

Note: Please contact your Customer Success team to enable this feature!

## Forsta Go

1. **New release: Forsta Go**
   - You can download Android version 2024.10.1 and iOS version 2024.10.1 from their respective app stores.
   - The biggest improvement is that the AI Summary Tile widget is now available in Forsta Go! You can now take ChatGPT's insights of your data on the go.
   - We've made major improvements to the performance of large reports on iOS as well, allowing customers to push the limits of mobile reporting to new heights. A similar fix for Android is in the works.
   - You can try out Forsta Go by simply downloading and opening the app, and selecting "View Sample Reports" on the bottom of the screen

## CAPI

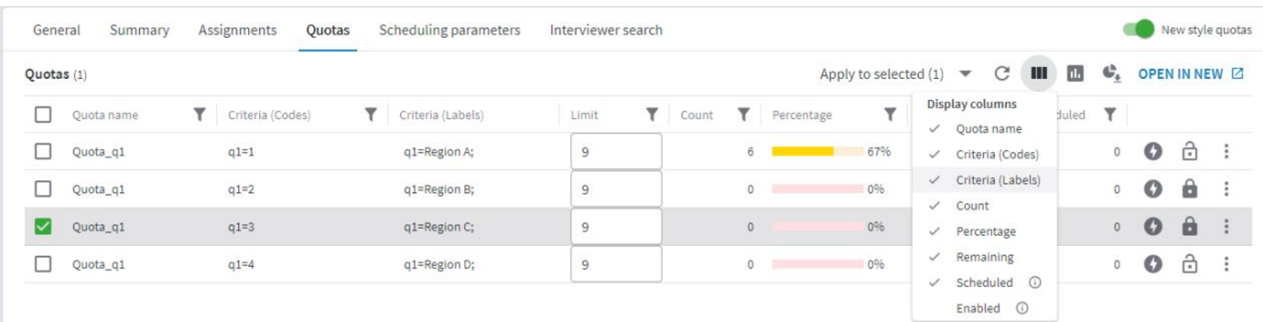
1. **A new version of CAPI app is now available and includes:**
   - Automatically trigger a sync on closing a survey in CAPI (and status, Postponed, Completed, etc.)
   - Prevent server respondent from being overwritten by CAPI (CAPINoOverwrite)
   - Allow respondent Data from CAWI to merge with CAPI respondent even when in-progress
   - CAPI App for Android minimum OS now increased to OS 8.0

   CAPI App can be downloaded from Google Play, Apple App Store or for Windows.

# CATI

## 1. Improvements to the new quota management UI

We've been incrementally releasing improvements to the new quota management UI. This week we have added a new column to display quota criteria with answer labels (instead of answer codes). This will help to provide clearer labelling of the quota cells. A new column 'Criteria (Labels)' can now be enabled from the column selector in the quotas toolbar. The new column will show the answer labels that are used in the questions which the quotas are based on (instead of the code numbers). You can choose to hide the 'Criteria (Codes)' column or keep both in the view:

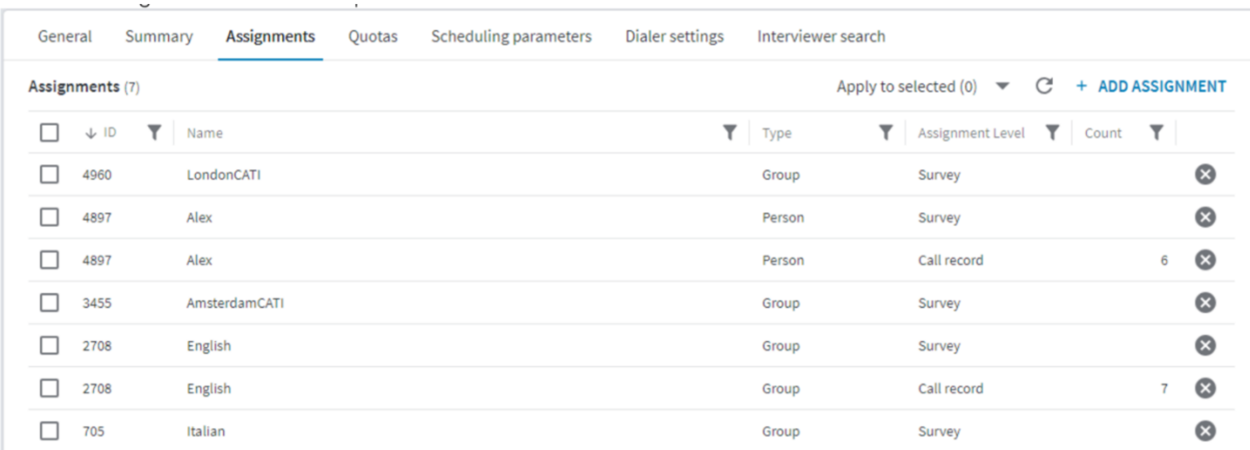



- Note: Currently the new column does not support filtering although we will be introducing this in a following update. Filtering can however be applied using the 'Criteria (Codes)'. During an ongoing session, the Quick Link can also be copied by clicking on the 'More' button (⋮) within the session interface
- You also can now:
    - Open selected quota cells in Call Management
    - Close/open selected quota cells
    - Adjust quota balancing priorities

## 2. Improved interfaces for managing interviewer assignments

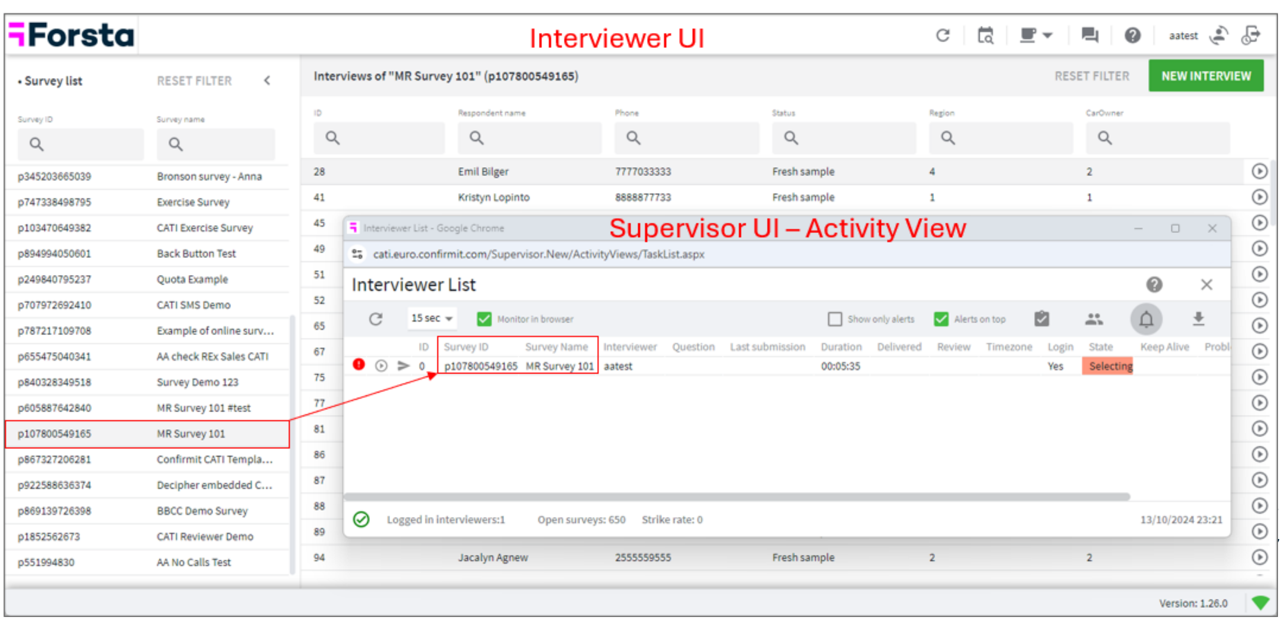
- To be able to more easily manage bulk assignment for interviewers we have introduced a revamped user experience (currently this is only available when the CATI Supervisor has the 'New style' setting toggled on). The assignment level column has been added to make it easier to understand the distinction between assignments that are for the entirety of the survey as a whole vs those which are assigned to specific call records within the survey. In the case of assignments at the 'Call record' level the count column will indicate how many assignments the individual or group has.

To add new assignments the user should press the '+ADD ASSIGNMENT' button:




| | ID | Name | Type | Assignment Level | Count |
|---|---|---|---|---|---|
| ☐ | 4960 | LondonCATI | Group | Survey | |
| ☐ | 4897 | Alex | Person | Survey | |
| ☐ | 4897 | Alex | Person | Call record | 6 |
| ☐ | 3455 | AmsterdamCATI | Group | Survey | |
| ☐ | 2708 | English | Group | Survey | |
| ☐ | 2708 | English | Group | Call record | 7 |
| ☐ | 705 | Italian | Group | Survey | |

- Next, use the 'Available interviewers' and 'Available groups' tabs to find and select the individuals or groups you wish to assign. The cumulative number of selected individuals and groups can be reviewed by looking at the 'Selected' tab. The number of selected items is also included in the 'ASSIGN SELECTED' button.
- Press the 'ASSIGN SELECTED' button to create assignments for all the currently selected interviewers or groups of interviewers or choose 'CANCEL' to close the UI without adding any assignments.
- To remove assignments, you can either select multiple items from the list and then choose 'Unassign' from the 'Apply to selected' menu option in the toolbar or you can simply click the unassign button at the end of the row for the interviewer or group you wish to remove.
- Another improvement we've made is that the system will now show the currently selected survey in the supervisors Activity View (Interviewers List) when an interviewer is working in the manual selection mode (whatever survey the interviewer has selected in the left pane will be reflected in the activity view window for supervisors).



Value

- The new quota management UI makes it much faster to update multiple quota targets and provides all quotas in a single, user customizable view
- The new assignments UI makes it much easier to filter the list and select multiple individuals or groups for assignment.
- Showing the selected survey in the supervisor activity view makes it possible to more precisely filter the list to a survey of interest (removing the noise of the other surveys).

## SmartHub

1. **SPSS import into Hub**
   We're excited to announce that we've released SPSS import to HUB, including Loop support, import of multiple files (waves as an example) and the option to modify schema/meta data through Survey Designer.

Note: Please contact Forsta Plus Support to enable this feature. It will be enabled for all users soon.

Steps:

- Go to "Manage survey" and select "Import an SPSS file"
- Select your file locally on your computer. The file size limit is 200MB
- From the questions in your file, select what questions should be used as Respondent ID, Interview Date and Status. Status has mapping available.
- Select what multichoice separator and grid separator your file has, then import the file.

Once you have created your File Survey, you can then import more data into it. This can be done as loops or additional data, for example months/waves of data. For additional data, the previous steps are applicable, just start your import from your Survey Overview page. For Loop data, a different flow will be shown.

- Instead of importing data, there is a new tab called "Import loop"
- Once selected, browse for your file on your local computer
- Select the file that includes your parent data
- Select what question is your "loop"/iterator
- In the next step, select your Respondent ID. This is one of the keys to connect to the parent level.
- Select what multi choice separator and grid separator your file has, then Import the file.

Once imported, you will see the different files imported as levels in the "mapping area" in your Survey overview page.

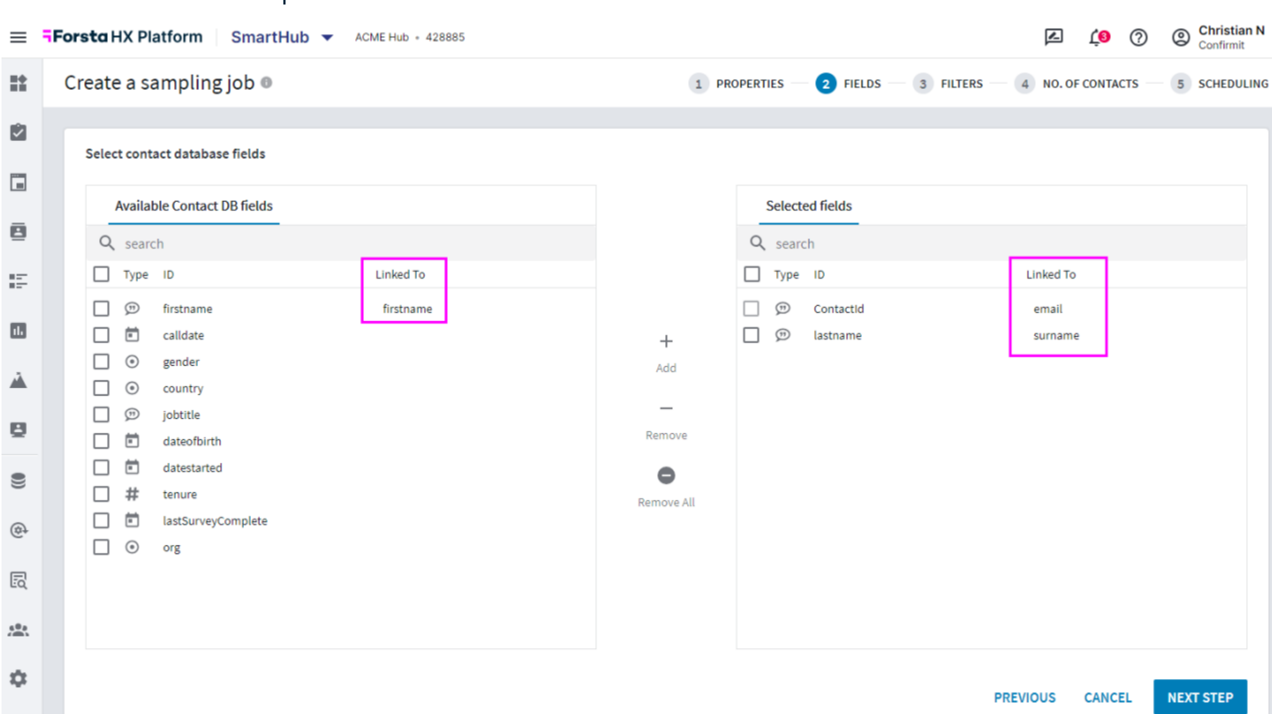
If you would like to delete respondents from your File survey, this is done by deleting the file they were imported in. Once deleted, the schema for that file will still exist in the survey.
If you would like to delete/modify the schema, this is done form Survey Designer. Enter Survey Designer from your Survey Overview and click "Edit" in the upper right corner.

Note: After changes are done in Survey Designer, the survey must be relaunched for them to be shown in the FileSurvey in the Hub. The Survey ID in Survey Designer is a P-ID, whereas in the HUB you have an E-ID. However, the File survey in Survey Designer can only be reached

## Contact Database Sampling

1. **Re-ordered Sampling wizard**
   We have re-ordered the sampling wizard so that it corresponds more with the sampling process and figures out on the first step if the survey is ready to us or not. Previously you would not select the survey until the third step and you had to fix the survey before starting over again.
2. **Utilize Survey/Contact database field mappings when uploading sample to survey**
   When a survey is linked to the Contact Database, you can also create mappings between the survey fields and Contact Database fields. Now the sampling wizard will make use of these mappings, so that you can have different field names but still avoid data duplication. A common example would be the ContactId, which often holds the email address, while surveys usually have an email field.

   Note: The sampling field selection still insists on including the email field. We will remove this requirement soon.



3. **Filter by multi variables**
   Finally, we've added Support for filtering by multi variables in sample jobs. This will make it even easier to select a specific segment of the Contact database population for your survey.

# Digital Diaries

We have successfully migrated the EU and AU Digital Diaries sites. Please note the changed URL for accessing the site. The US site will be migrated in the near future. For questions regarding the site migration, please reach out to customersuccess@forsta.com
This migration has allowed us to release the following features:

1. **New messages page**
   We've modernized the look and feel of the Messages page, while also implementing a few additional capabilities to address researchers and community leaders' communication needs.

Value

- Better messages organization and management, allowing drafts to be saved and messages to be scheduled and sent later.
- Ease of use, when managing hundreds of participants, with the new searching and filtering capabilities.
- Provide visibility to the broader research team, with the ability to copy other researcher users to the threads with participants.

Please visit our Knowledge Base for additional documentation

2. **Hide Responses and Comments**
   We've introduced new functionality to allow the segment contact users (main researchers, moderators or community leaders) to hide individuals responses and comments, submitted for standard and Discussion activities. This allows for better control over what broader team members and observers can review by hiding certain responses and comments for privacy reasons.

3. **Mobile application updates**
   We've released another round of changes to get us closer to a full parity between the web browser and mobile app interfaces for participant users.

### Value

- No more limitations when participants want to compete the Location collector questions via the mobile app.
- Update responses, using the capability to edit the already submitted discussion posts.
- Gather users feedback by implementing in-app feedback and app store review prompts.

# Panel Management

1. **We now allow distribution based on multiple samples**
   A new button has been added in the sample manager titled "Distribute Selected" When clicked, and one or more samples are selected, it will create a distribution which uses those samples for its calculation.