Forsta

October 2025

Product Release

Customer Success

a PG Forsta company

Welcome!

In the month of October, we added new features for you to check out for the following products:

— Panel Management

1. Project level enhancements

— Forsta Surveys

1. Improved performance
2. DCM Element Styles
3. Media Evaluator support
4. Compat Retirement Reminder

— Forsta Plus

1. Studio Crosstabs with Related Data Sources
2. Studio Kiosk Mode in Limited Availability
3. Survey Designer quota administration updates

— Forsta Visualizations

1. Research Agent available to all admins
2. Respondent Cleaning
3. User Interface Update for Respondent Table
4. AI Computes – Smarter and default
5. Custom Date Formatting

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

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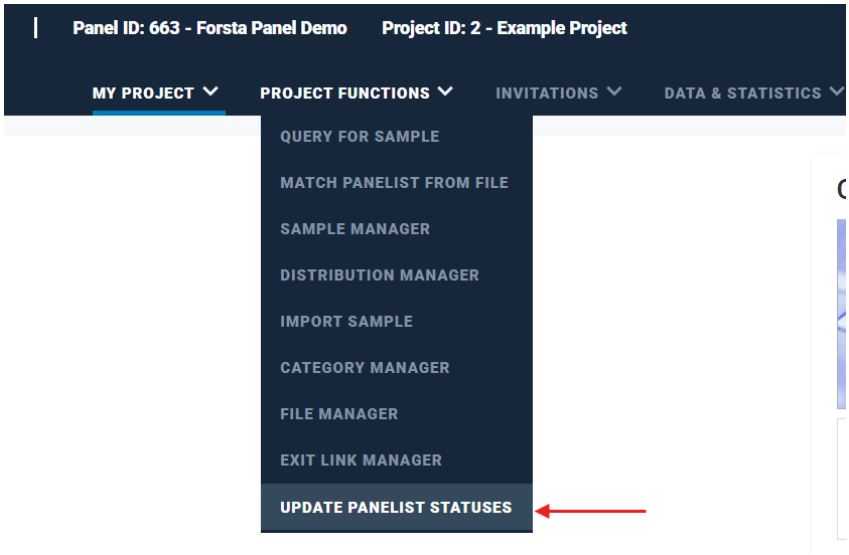
Panel Management

1. You can now update panelist statuses, points, notes, and custom status details at the project level.



Forsta Surveys (Decipher)

1. Improved performance on systems where the database has low response time.

2. The DCM element is now easier to style with custom CSS.
   Learn More: **Customizing the DCM Conjoint Element**

3. Media Evaluator now supports smartphones.
   Learn More: Media Evaluator

4. **REMINDER:**

On January 13, 2026, surveys marked as "DEPRECATED" will no longer be supported and surveys with a compat levels of 108-142 will be transitioned to "RETIRED". ***These projects will not load in the portal at-all after this date! This includes historical reports and data downloads on projects that are closed.*** To prevent a survey from being retired, upgrade your survey's compat level. To learn more, see Survey Compat Levels.

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Forsta Plus

1. **Studio Crosstabs with Related Data Sources**

   Previously, Studio Crosstabs could only be built using variables from a single data source. With this update, users can now create crosstabs using variables from **multiple related data sources**.

   Here's how it works:
   - Drag a variable from one data source into your crosstab.
   - Switch to a related data source and drag in another variable.
   - Generate your crosstab as usual!

   If you switch to an **unrelated** data source, the UI will display a warning and clear the current setup if you choose to proceed.
   This new capability unlocks **deeper insights** by allowing users to combine survey results with additional uploaded data from custom tables—enhancing the power and flexibility of crosstab reporting.

   To use this feature:
   - The relationship between datasets must be configured in CDL.
   - The custom dataset must be the parent in the relationship.

2. **Studio "Kiosk mode"**
   We're excited to announce the release of another highly anticipated feature in Studio: "**Kiosk Mode**" (also known as "Open" report mode) is now live on Production sites in **Limited Availability**!

   Pro users can now publish reports in Kiosk Mode, which keeps the report continuously open (no timeout) and automatically refreshes data every 5 minutes. This feature addresses the need to display reports on large screens for passive viewing – ideal for real-time customer feedback in retail settings and patient experience dashboards in clinical environments.

   How It Works:
   - Go to **Report Permissions** and choose between "Standard" and "Kiosk" modes
   - Switching to Kiosk Mode will prompt a warning about auto-refresh and persistent display
   - Publish the report
   - An **end user login** is still required
   - Log in on the display device, apply any filters, and leave it running - data will refresh without clearing filters

   Note: Kiosk Mode is currently behind a **Feature Toggle**. Please reach out to your Account Representative to have it enabled.
3. **Survey Designer Quota administration updates**

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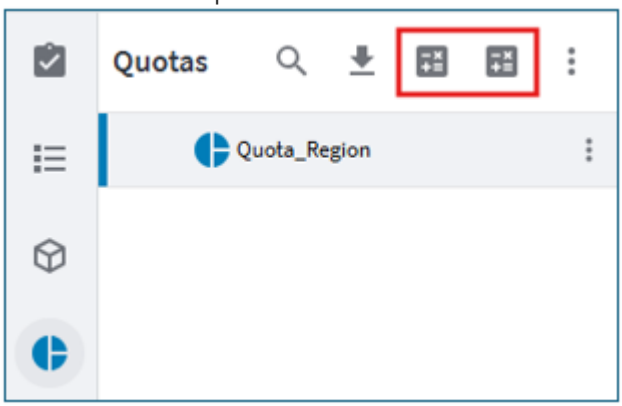
a. **Recalculate All Quotas**

Following the recent update which added support for recalculating individual quota definitions we have now added a Recalculate All feature that provides a quick method to run the recalculation for all **Test** or **Production** mode quota counts across all quota definitions in a single bulk operation.

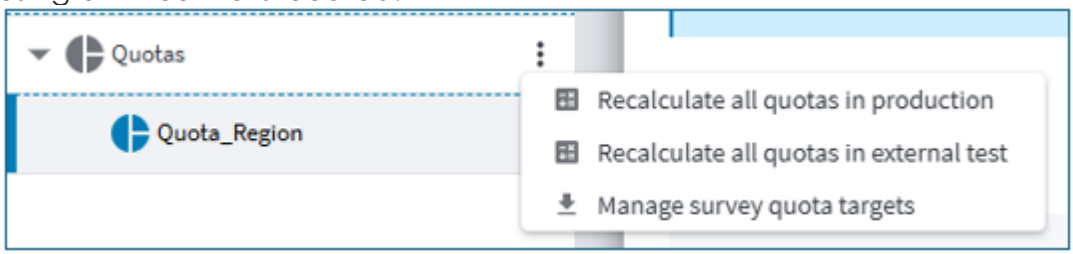
Access to this feature varies depending on how your questionnaire tree mode is set. In the default tree mode you will see two new recalculate buttons in the quotas toolbar.



The first button recalculates counts for all production quotas, and the second does the same for all test quotas. These buttons only appear once the survey has been launched for production or external testing.

If you are working with the questionnaire tree set to 'Full tree mode' then these operations are included in a new overflow menu in the Quotas area of the tree.

Please note that this menu is also where the option to manage quota limits using an Excel file is located.



b. **Set All Test Limits**

When testing a survey with quotas using external test links the test interviews may be terminated prematurely by quota fail conditions because the quota cell limits have not been raised above the zero defaults. A new 'SET ALL LIMITS TO' feature has been added to the toolbar for test quotas that can be used to quickly set all call limits for the quota with a single click.

The default value of 999 is provided but can be adjusted if needed.

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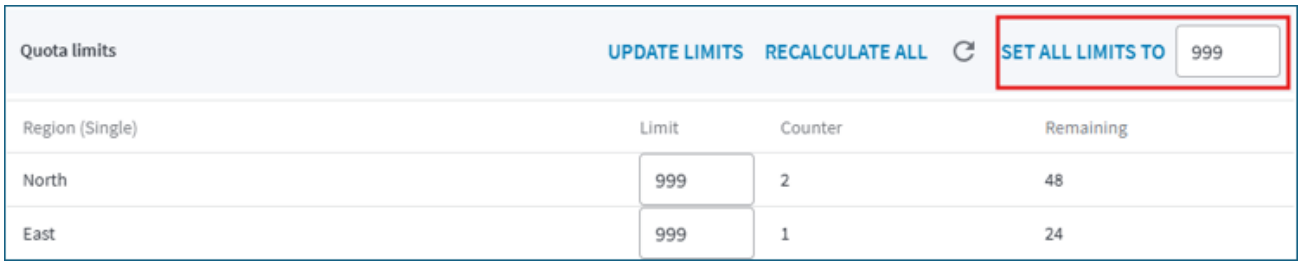

Forsta Visualizations

StoryTeller

1. **Research Agent** is now available to all admins!
   Acting as your in-platform AI assistant, it helps improve slide layouts, summarize reports, and generate executive overviews directly in StoryTeller.
   Built with privacy in mind, the Research Agent uses visual analysis only and does not access any raw or metadata. It operates securely through Azure OpenAI.
   By default, Research Agent is now enabled for all projects.
   Upcoming enhancements include conversational prompting, dynamic prompting, and multi-slide analysis and availability settings to support report users. **We welcome your suggestions, feedback, and ideas on how this feature can best support you and your report users in the future, please reach out to your Forsta representative.**

   ➢ **Read the full release notes here.**

2. **Respondent Cleaning – Keep your data accurate!**
   This new tool lets you automatically remove respondents based on predefined rules during project activation. This ensures that your data remains accurate and free from invalid or unwanted responses before they reach your reports.

   Cleaning rules are created using imported questions, allowing you to combine categorical and date variables to define which respondents should be removed. These rules are executed before any variables created within the project are generated, which is why only imported questions can be used in the setup.

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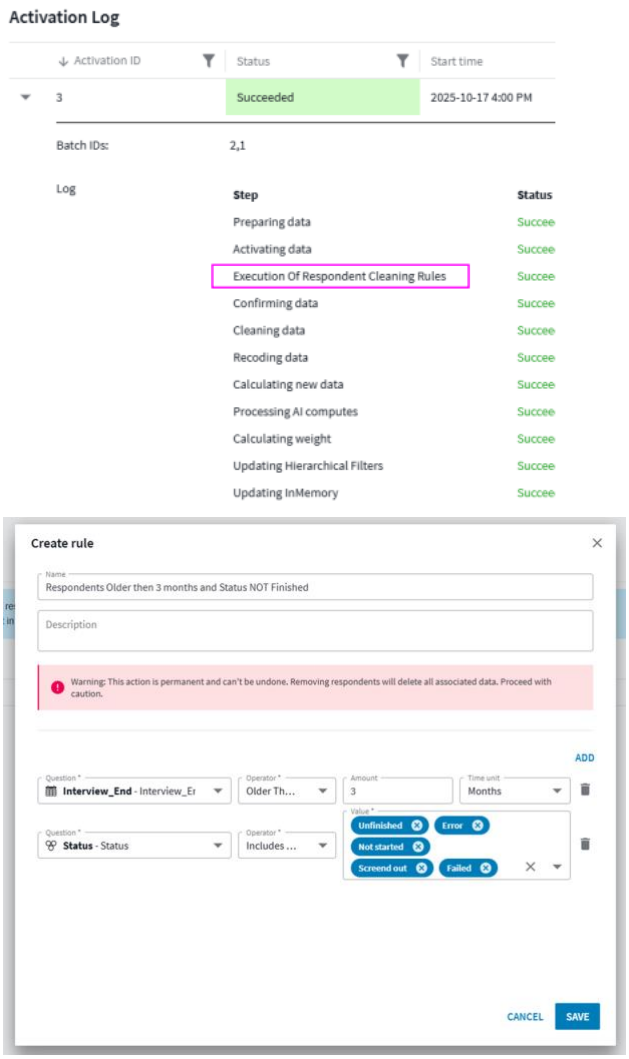

NOTE: Once executed, respondents removed through this process are premanently deleted from the projkect and cannot be restored.

3. **Interface Update – Respondent Table**

   The Respondent Table setup panel has been redesigned to align with the modern StoryTeller layout. All configuration options are now organized in a right-hand side panel for a faster and clearer setup experience. To use the new UI, enable "Use new StoryTeller setup layout" under Project settings - Beta settings in your project.

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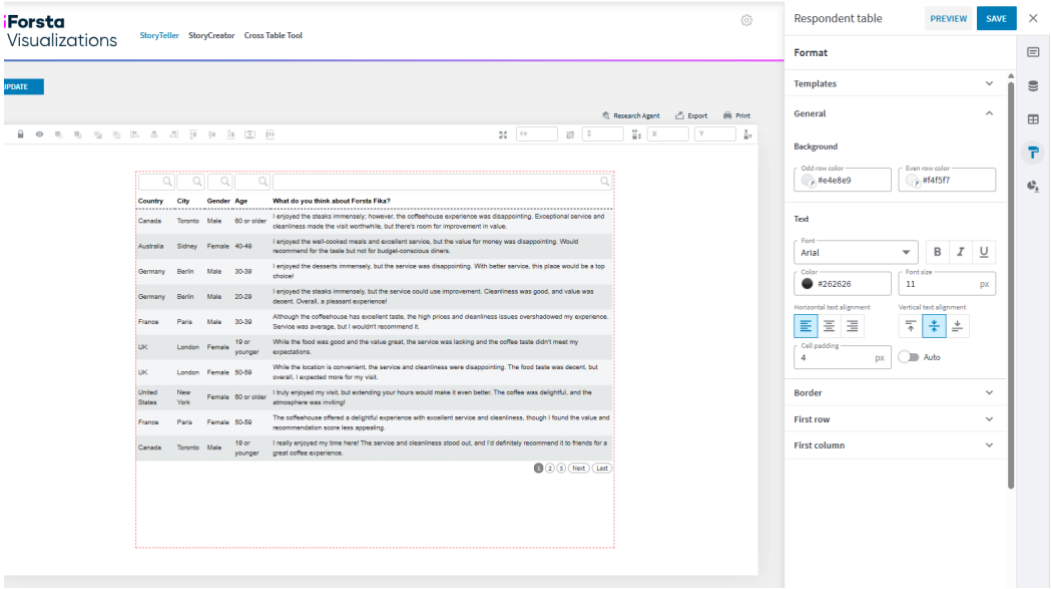
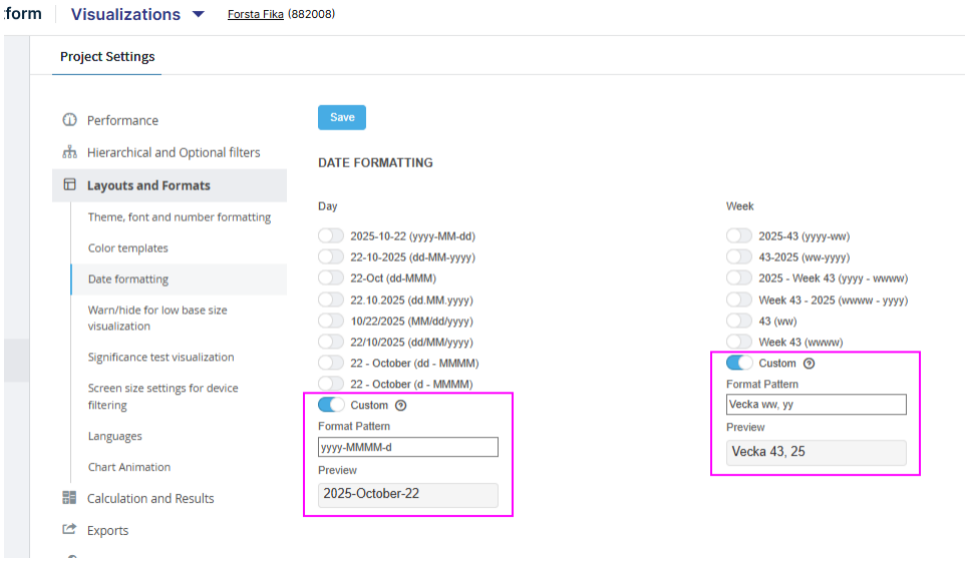


4. **AI Computes – Smarter and default**
   AI Computes are now available by default in all projects. You can also include regular Computes as input variables, enabling more advanced combined analyses of open-ended responses.
5. **Custom Date Formatting – Full Flexibility**
   You can now create your own date and time formats using .NET syntax. Combine elements like days, weeks, months, and custom text to design tailored date outputs for consistent reporting.



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