May 2026

Product Release

Customer Success

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

— Panel Management

1. The community copy button now has a confirmation modal to confirm duplication of community

— Decipher (Forsta Surveys)

1. The new survey compat level is 155

— Forsta Plus

1. Studio: Crosstab updates and side-by-side reporting of data from multiple hubs
2. CATI: Custom Productivity Reporting in Studio
3. Restore Deleted Action Management Cases
4. Survey Designer: Dynamic Conversations (Limited Availability)
5. Contact Database updates

— Forsta Visualizations

1. Different line styles per series
2. Improved benchmark sorting between series
3. More flexible Top/Bottom selections

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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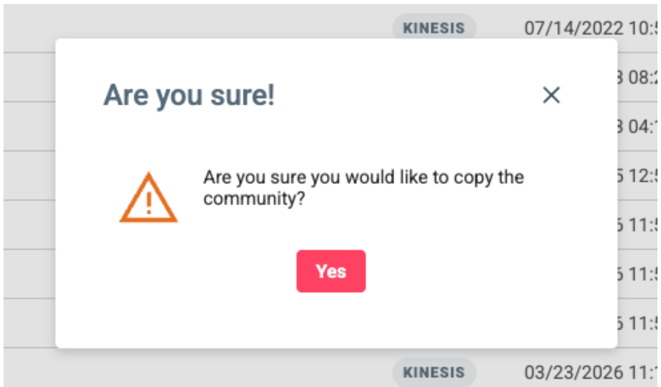
Panel Management

1. The community copy button now has a confirmation modal to confirm duplication of community.



Decipher (Forsta Surveys)

1. The new survey compatibility level is 155. The system automatically uses compat="155" for all new surveys.

   - This compat will include jQuery upgrade (jQuery 3.7.1 and jQuery-UI 1.14.1) for participant View
   - ADA compliance support update for
     - WCAG 2.2
     - Section 508 (U.S. accessibility requirements)
     - EN 301 549 (European accessibility standard)
   - Please note that dynamic questions will not display for compat 154 and below in the survey editor's element library. If clients want to be able to see them in the UI, they will need to update to compat 155 from 154 (and below).

Forsta Plus

1. Studio

a. Crosstabs updates

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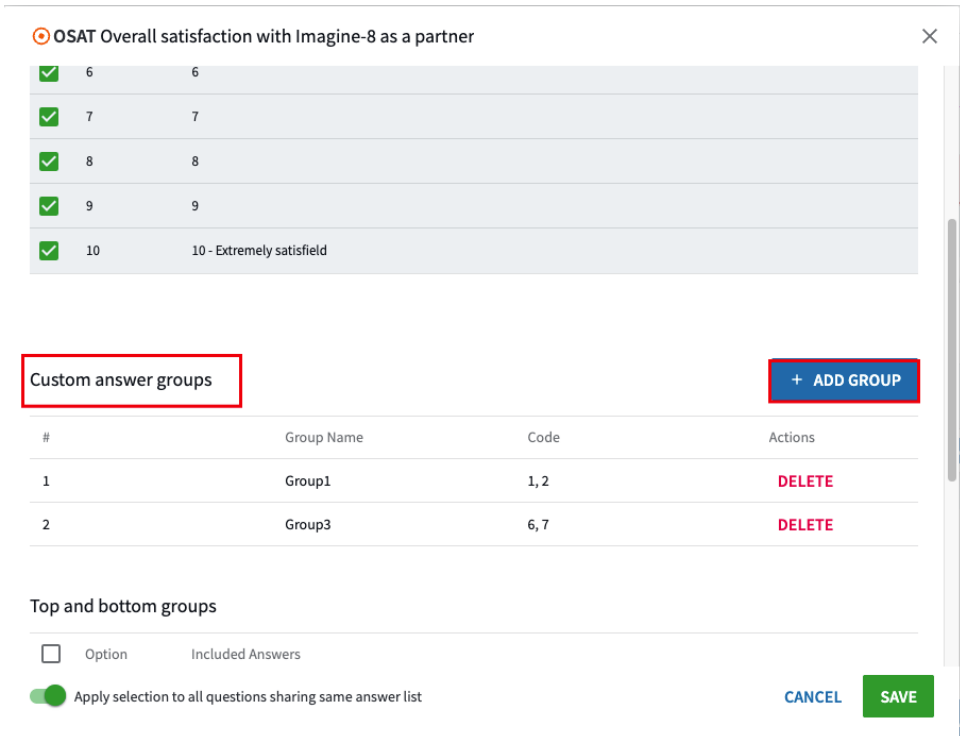
I. **Custom Answer Grouping**: Answers can now be combined into names groups directly within the UI.
While top/bottom box functionality has been available for some time, users can now create custom groups using any answers from the current categorical question. This long-standing request enables customers to build answer groups on the fly, making reporting and analysis more flexible and powerful.

- A Pro user must first enable this feature in the page edit panel by toggling **“Enable Custom Answer Groups”**
- Add a categorical question to Crosstab rows
- Click the orange pill and select **“Add Group”**
- Choose the answer options, name the group, and click **“Save”**



II. **Freeze Panes**: Left-hand and top panes can be frozen independently while scrolling
Freeze Panes improves the Crosstab experience, particularly for large tables requiring horizontal or vertical scrolling. Users can now keep headers fixed by freezing the top and/or left panes, making it much easier to maintain context when reviewing data.

- Available to all users via the **View Settings** menu
- Simply toggle options on or off as needed

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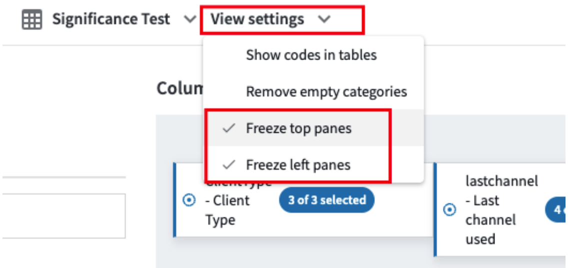

b. **Side-by-side reporting of data from multiple hubs**

Historically, Studio dashboards were tied to one specific hub, with all data sources required for reporting needing to reside in this hub.

With this release, it is now possible to:

- Query data from additional hub(s) *(with relevant hub access permissions*)
- Control the hub source at a per-widget level

Why?

- For most customers, the single-hub model makes sense. However, there are cases within healthcare where we wish to display results from multiple business units (e.g. PX, EX, Brand) on a single dashboard to provide a higher-level overview of data or bring perspectives from different elements of the experience together. From an administration perspective, it does not make sense to have these BU's share the same hub or to copy data across different hubs, so this feature can enable this type of combined reporting with considerably less overhead.

Limitations:

- This feature is to enable side-by-side reporting from multiple hubs in dashboards only (i.e. no cross-hub filtering or querying is supported)
- The designer must have read permission to the additional hub(s) to access it.
- Configuration is CDL only
- For widgets using the source of an additional hub, the full path reference must be used in any expressions
  - (e.g. expressions don't take into account any default dataset / table shortcuts like: OSAT, so instead you will need to write out the full path e.g. ***p12345678.response:OSAT***
- Setting of the hub source is at a widget (not tile) level

Availability

The CDL changes to enable this capability **generally available** to all users. The CDL reference guide and Knowledge base updates will be available soon.

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2. CATI

a. Custom Productivity Reporting in Studio

We've released of a powerful new capability that allows users to **create custom CATI productivity reports using Studio**.
This helps address many CATI client requests where existing out-of-the-box reports in the CATI Supervisor UI do not fully meet their needs.

- To support this, CATI 'Paradata' (**call history, interviewer session,** and **break data)** can now be automatically copied to a **Hub**, which can then be used as a data source in **Studio**. This provides clients a way to access the same data which is used to generate the out-of-the-box productivity reports found in the CATI Supervisor UI.
- For users wanting to build reports that utilize both CATI paradata and survey data it is possible to supplement the data sync with up to 5 commonly used survey variables.
- Alongside the documentation for setting up the Hub synchronization process, we have also prepared an example Studio report. This report closely replicates the standard CATI Interviewer Productivity report available in the CATI Supervisor UI and can be used as a reference to help users build their own custom reports in Studio.

User Documentation:
Setting up SmartHub data synchronization in CATI:
https://forstacati.zendesk.com/hc/en-us/articles/47425612902299-Synchronizing-CATI-Paradata-call-history-data-to-SmartHub

Example: Setting Up a CATI Interviewer Productivity Report with Studio
https://forstacati.zendesk.com/hc/en-us/articles/48151389846427-Setting-Up-a-CATI-Interviewer-Productivity-Report-with-Studio

Supplementing CATI Paradata with Survey Variables
https://forstacati.zendesk.com/hc/en-us/articles/49915006105627-Supplementing-CATI-Paradata-with-Survey-Variables

The set-up process begins by selecting a Hub that the data will be synchronized to in the CATI Supervisor UI…

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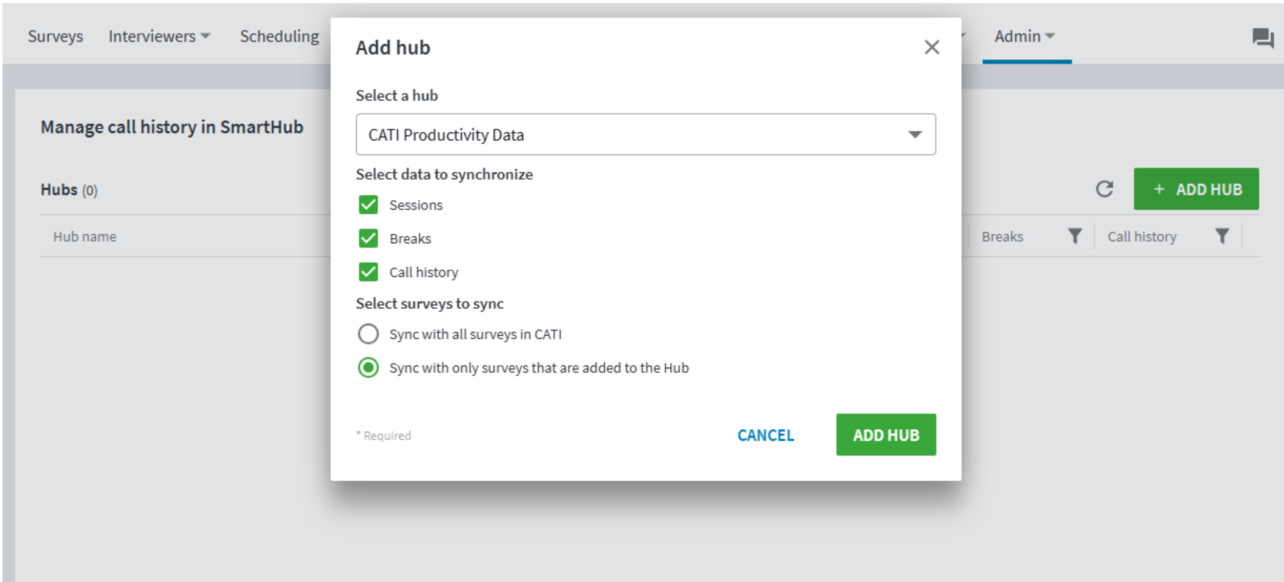
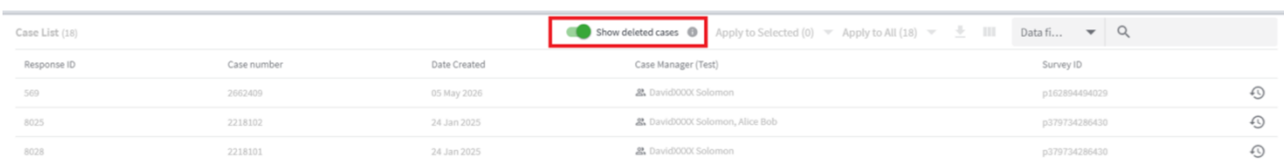


3. Restore Deleted Action Management Cases

We've introduced a small but significant upgrade to Action Management. You can now restore deleted cases through the UI!

Until now, case restore had to be handled through our development team and was very time consuming. Now, professional users and end users with delete permission will see a "Show deleted cases" toggle on the case list widget:



This will switch the view to only show deleted cases. You will not see regular cases in this view.

To restore a deleted case, click the clock icon to the right of the deleted case. This will immediately restore the case:

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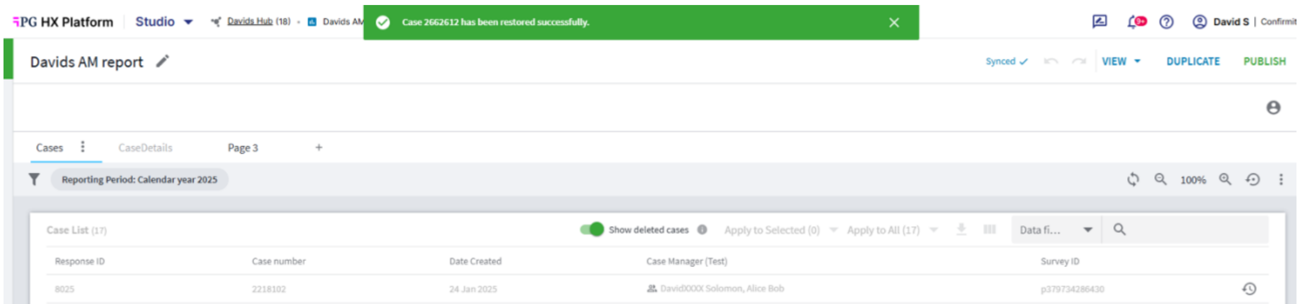

Note that because this view only shows deleted cases, this means that the deleted case will disappear. When you turn off the "Show deleted cases" toggle, however, you will see the restored case in your list.

Please see additional documentation here: https://forstaactionmanagement.zendesk.com/hc/en-us/articles/50669505856539-Restoring-Deleted-Cases-From-the-Case-List

4. Survey Designer: Dynamic Conversations (Limited Availability)

Dynamic Conversations is a new survey experience designed to increase response quality while reducing survey length and fatigue. It dynamically adapts the interview flow in real time, asking only the most relevant questions, while delivering a more conversational, engaging respondent experience.
Why this matters:

- Improves respondent engagement and completion rates through personalized, adaptive survey experiences
- Reduces unnecessary questions while still supporting benchmark questions and capturing actionable insights for decision-making
- Introduces a more modern, conversational UX aligned with our AI strategy

You can see it in action in this **6½ min demo video.**

Try it yourself here: **https://hxplatform.pressganey.com/wix/p525009592968.aspx**

Availability & Requirements
Dynamic Conversations is currently available under a feature toggle with the following requirements:

- Azure multi-tenant environments only (excludes EURO/US Rackspace, KSA, UAE, legacy DE and single-tenant sites)
- Forsta JavaScript engine enabled (controlled from survey settings)

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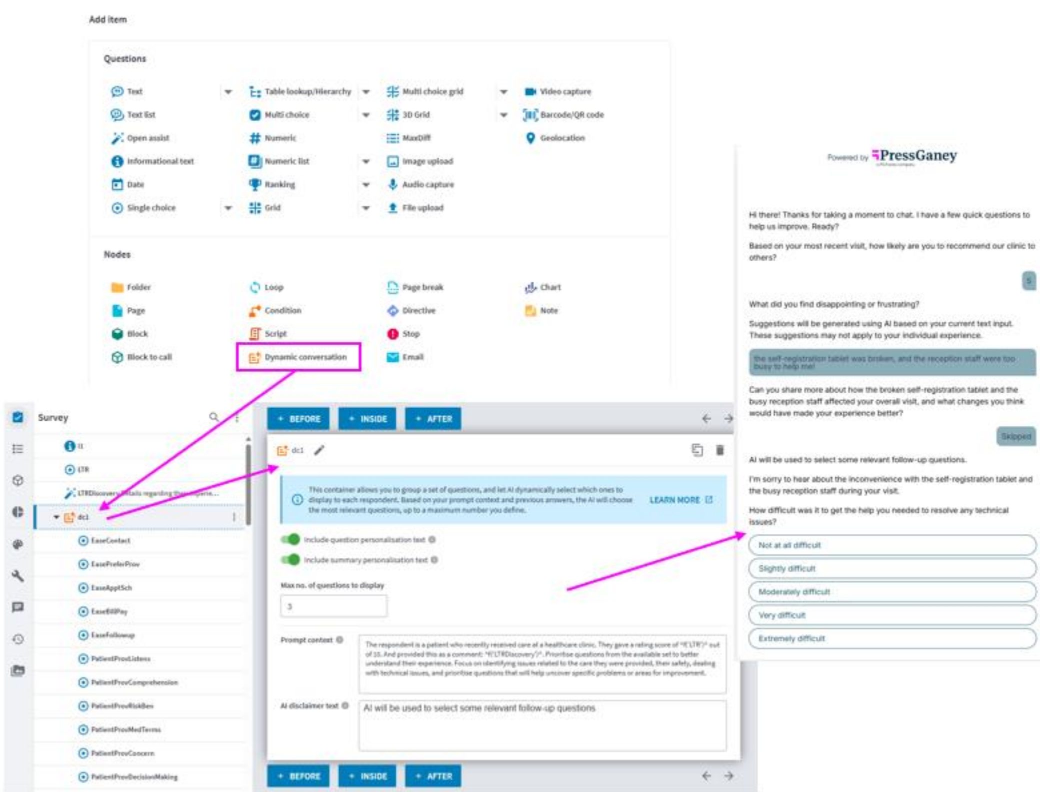
- Responsive Rendering V2 layout (e.g. “Public Responsive Whitespace Layout V2”)
- New Linux-based engine required

Note: The demo uses the upcoming ChatUI layout, which will be released shortly. Standard responsive layouts are supported today.
This is enabled for all staff users on supported multi-tenant SaaS Azure environments.

Documentation
Full documentation is available here: https://forstasurveydesigner.zendesk.com/hc/en-us/articles/49067356552859-Dynamic-Conversations This includes details on additional data captured during Dynamic Conversation flows for advanced analysis. Here's what it looks like for users:



*Please reach out to your Account representative if you would like early access and the opportunity to provide feedback.

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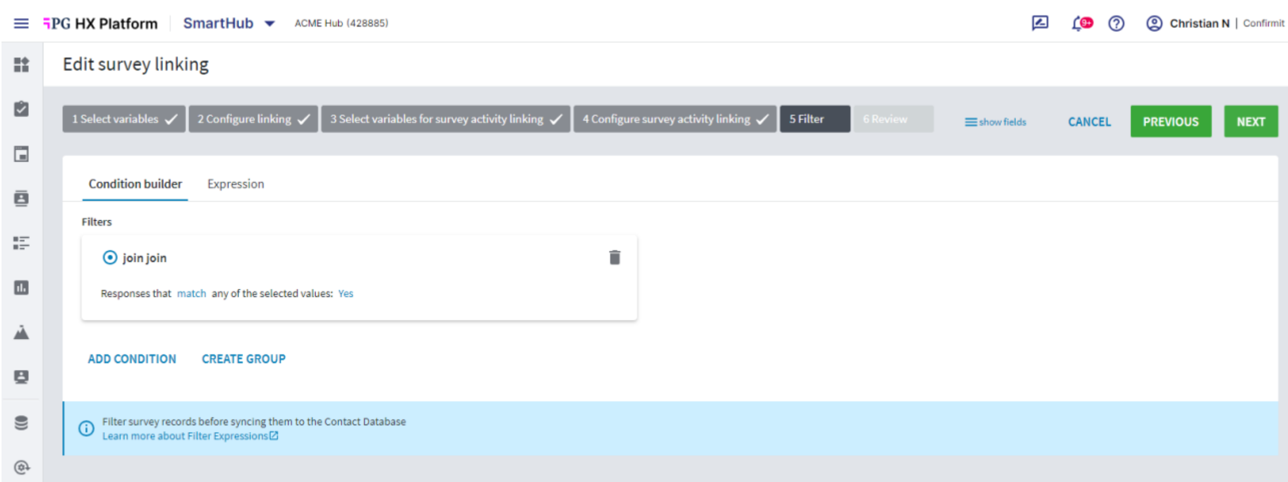
5. Contact Database

We have made updates to Contact Database survey linking and Contact Database sampling.
These changes were originally built to make the Community Advisor solution more robust and easier to set up and manage, but they are available to, and beneficial for, all Contact Database users.

Filter support for linked surveys

You can now add a filter in the Survey Linking wizard. This is useful when, for example, you use a registration survey for a Contact Database and only want to create contacts for respondents who opt in.



The filter can use both respondent data and response data. For basic filters, there is a condition builder. For more advanced use cases, you can use expressions based on Studio expression syntax.
One important limitation: we do not recommend using this filter for surveys that rely on Contact Frequency Rules, such as surveys used with Contact Database sampling. Respondents who are excluded by the filter will not update the Survey Activity record, and Contact Frequency Rules depend on Survey Activity data.

Linking survey response fields

It is now possible to link survey response fields to Contact Database fields. This makes it easier to collect additional contact information through a survey.
For example, you may have a basic registration survey first, then later ask for additional information in a follow-up survey and sync that information back to the Contact Database.

Please note that this does not allow users to display and edit existing Contact Database values in the survey. It only supports adding or updating Contact Database fields based on submitted survey responses.

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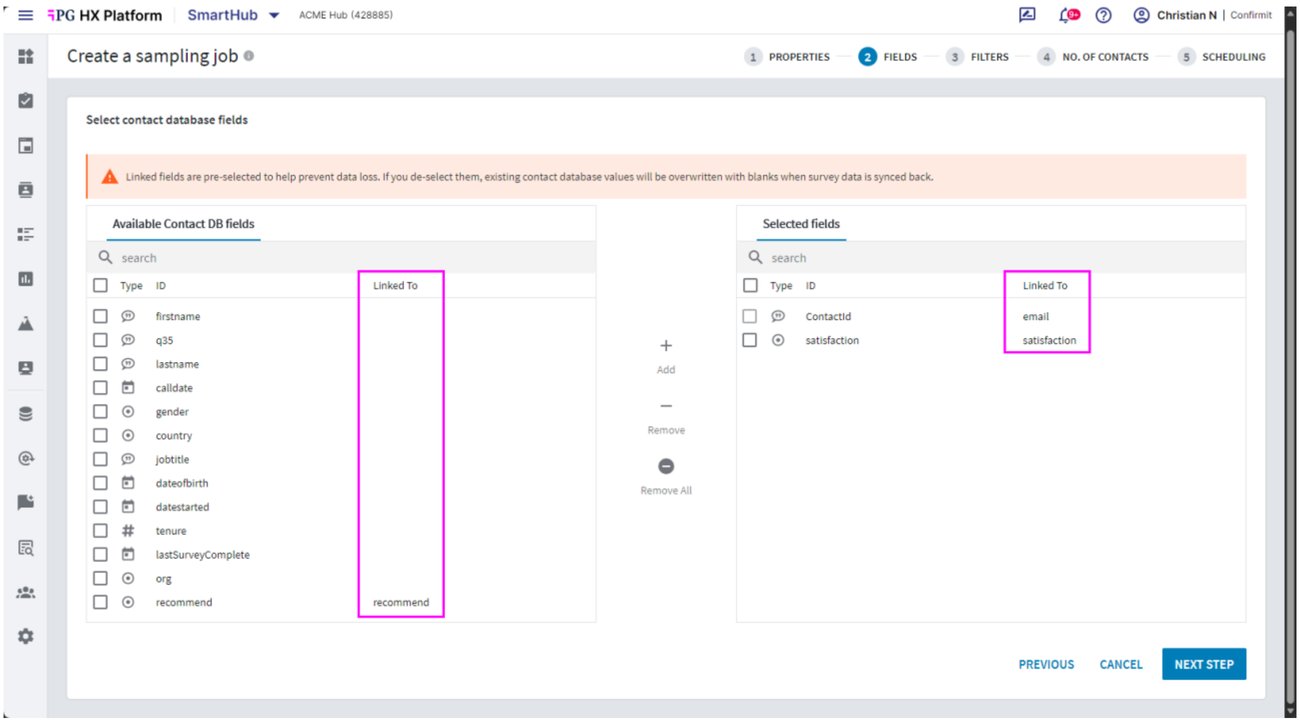
The Survey Engine team is planning improvements to the panel question types so that Contact Database can be used as a source and target. That work will support use cases where existing contact information needs to be displayed and edited in a survey.

Linked fields are now selected by default in sampling jobs

When a survey has background fields linked to Contact Database fields, those fields need to be included in sampling jobs for the linked data to sync correctly.



If linked fields are not included in a sampling job, the corresponding survey background fields may be empty when data syncs back to the Contact Database. In some cases, this can overwrite existing Contact Database values.
To reduce that risk, linked fields are now selected by default when a sampling job is created. If a user deselects a linked field, we now display a warning explaining the potential impact.

Honorable mention: linking Survey Activity variables

Some time ago, we also introduced support for linking survey variables to custom Survey Activity variables. This is useful when you want to store additional metadata for individual survey participations, rather than storing the information directly on the contact record.

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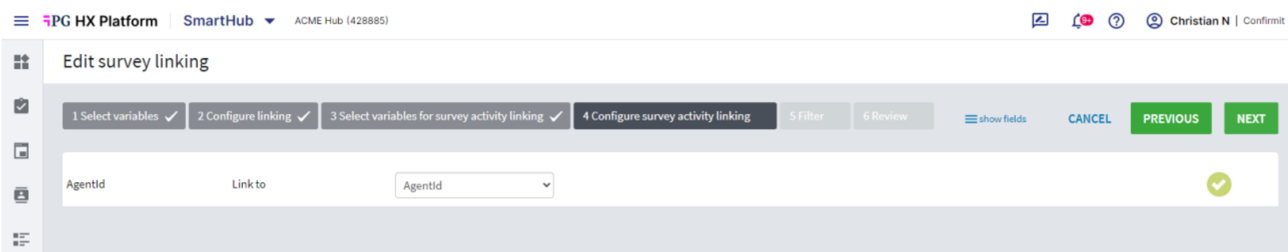
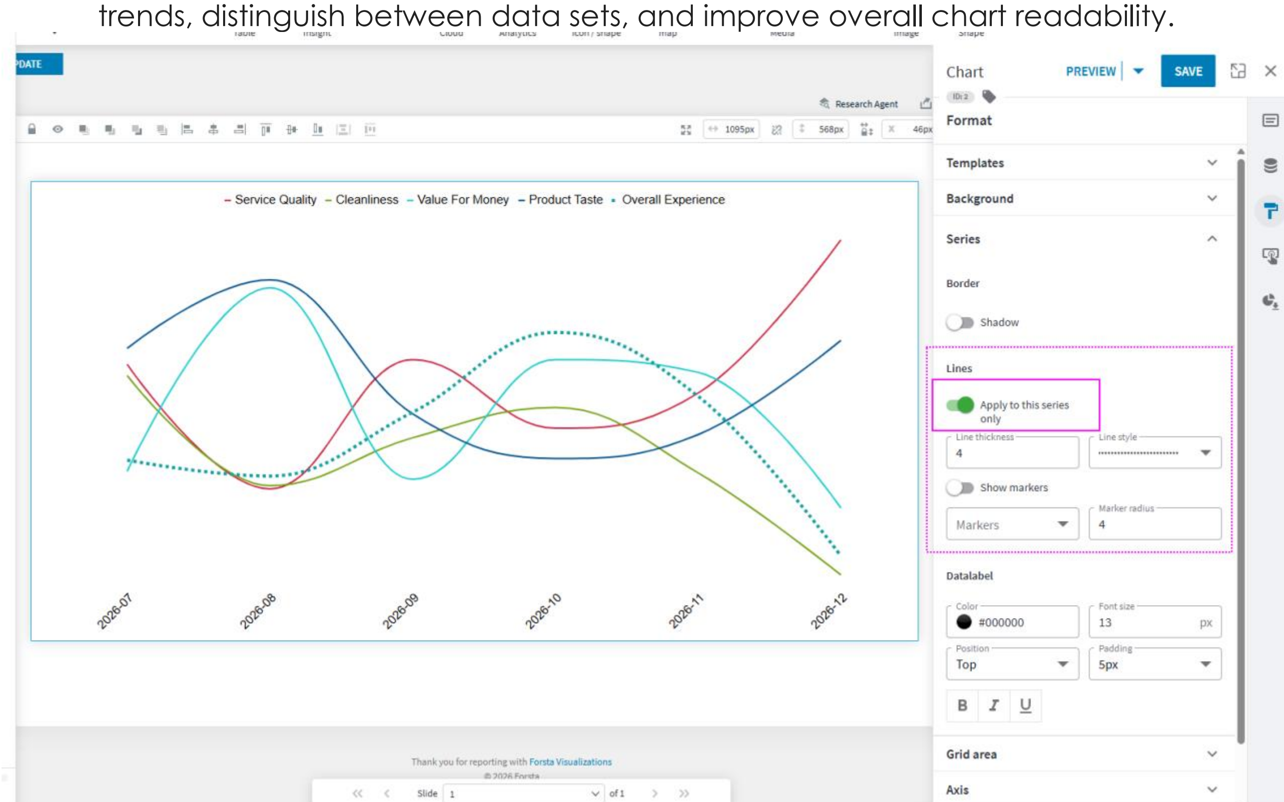


This capability is still behind a feature toggle. The toggle can be enabled on request by contacting your account representative.

Forsta Visualizations

1. Different line styles per series

Creating visually effective line charts is now easier. You can apply different line styles to individual series within the same chart, making it simpler to highlight key trends, distinguish between data sets, and improve overall chart readability.



2. Improved benchmark sorting between series

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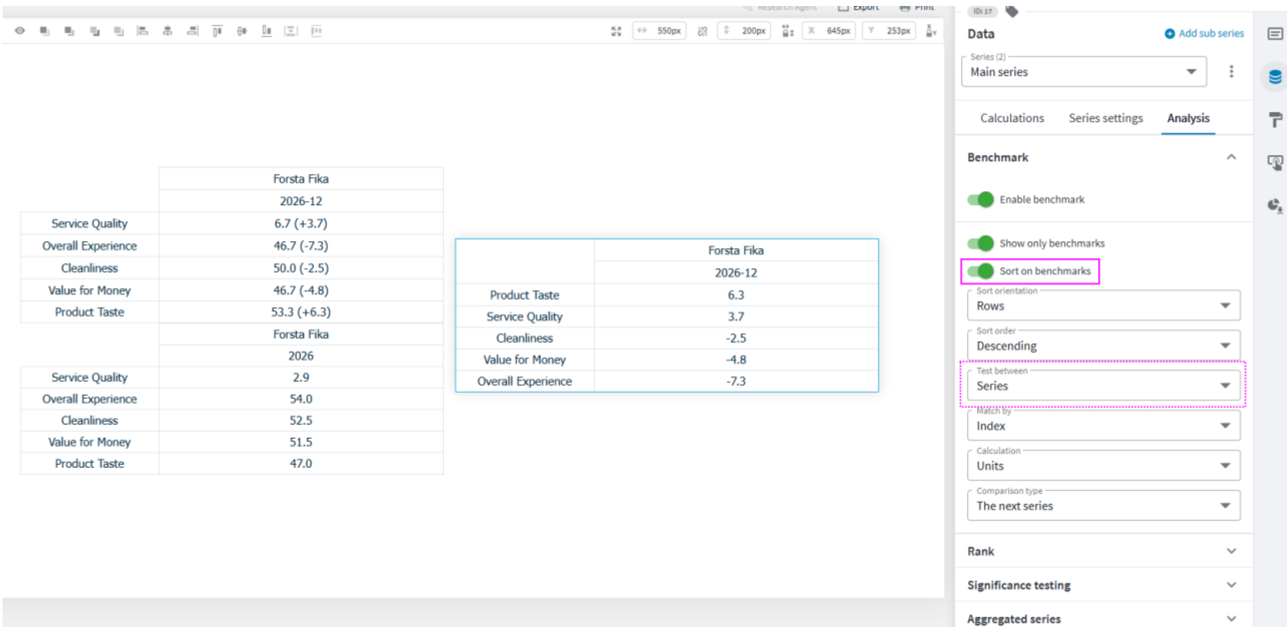
When benchmarking one series against another, you can now sort charts based on the benchmark results. This makes it easier to identify and focus on the most significant differences in your data. improve overall chart readability.



3. More flexible Top/Bottom selections

When using benchmark comparisons, you can now choose whether Top, Bottom, and Range selections should be based on the original data or the benchmark results. This gives you more control over what is highlighted in your charts.

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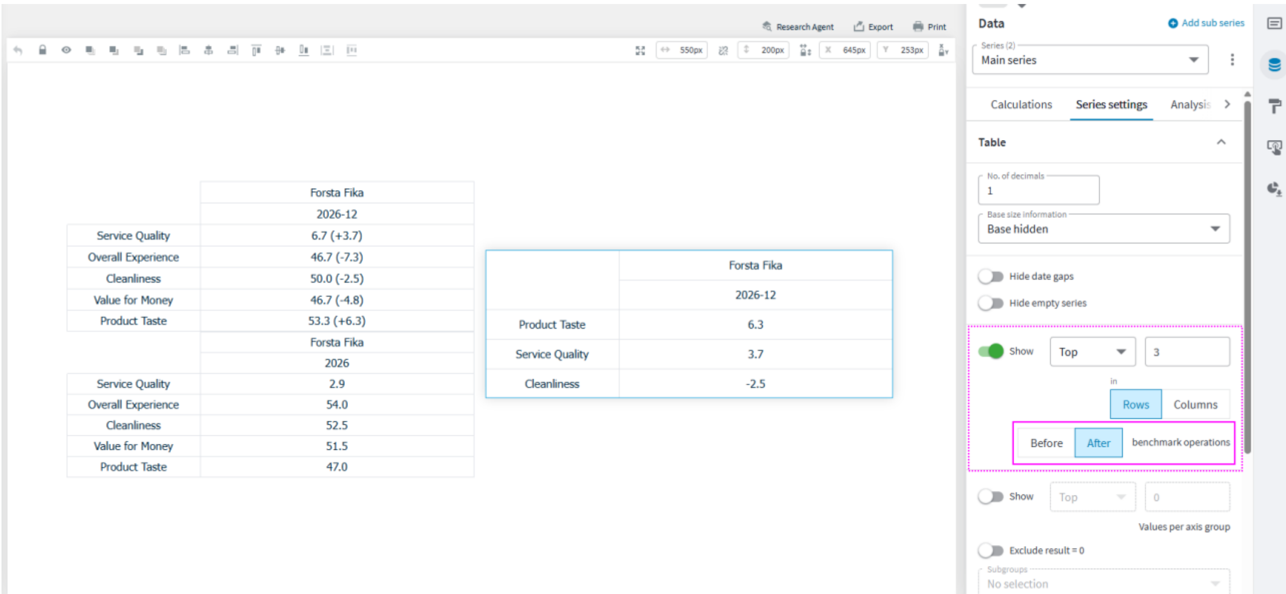

Full details are available in the Forsta Visualizations release notes.

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