



Getting Started with Forsta Surveys



About Forsta

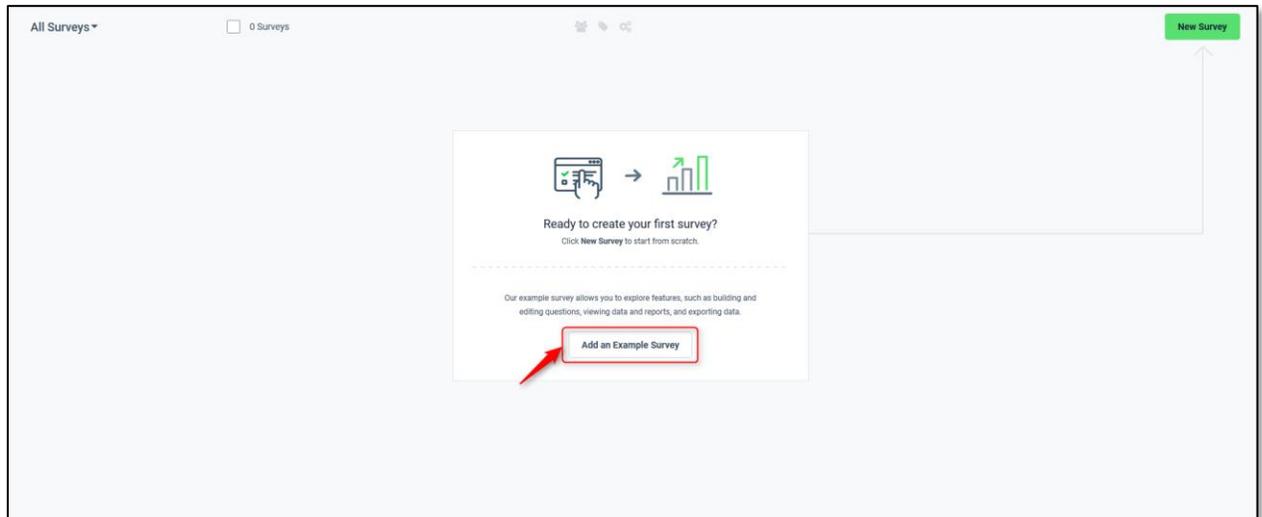
Forsta is the new frontier of Customer Experience and Market Research Technology. Formed in 2021 via the merger of industry leaders Confirmit and FocusVision, our global company powers the richest and most comprehensive set of research and insights solutions, spanning CX, enterprise feedback management, VoC, VoE, Qual, Quant, Data Visualization and more. Forsta's extensive set of market-leading tools, including the award-winning Dapresy data visualization and reporting suite, combined with the expert guidance of our seasoned data and insights professionals, empower decision-makers to drive business impact based on truly deeper customer understandings. Founded in the Nordics, Forsta means "to understand" in Swedish. Visit www.Forsta.com for more information.

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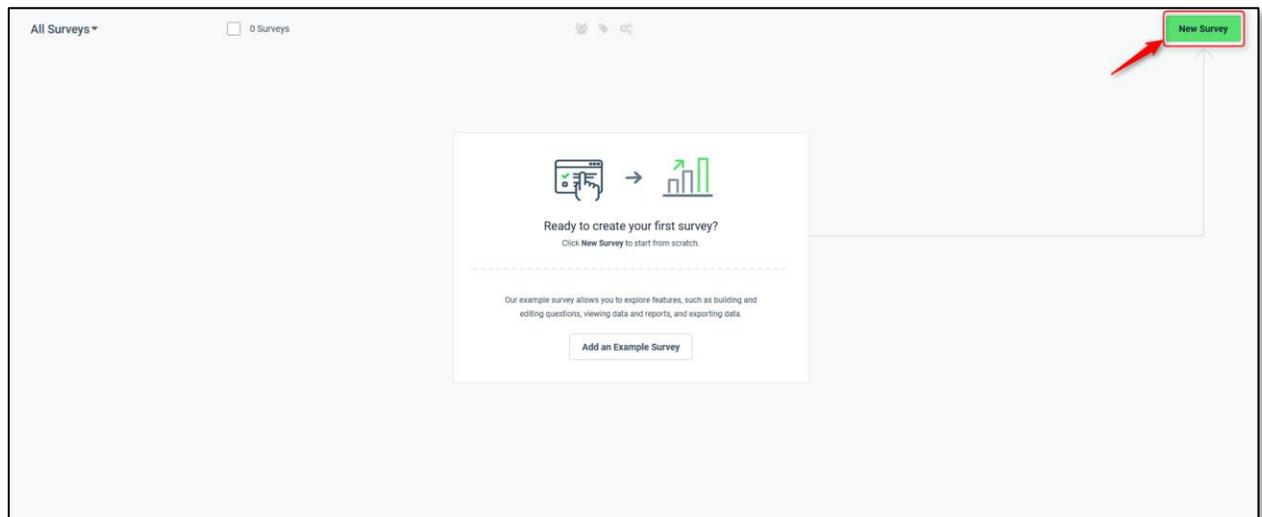
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Start a Survey

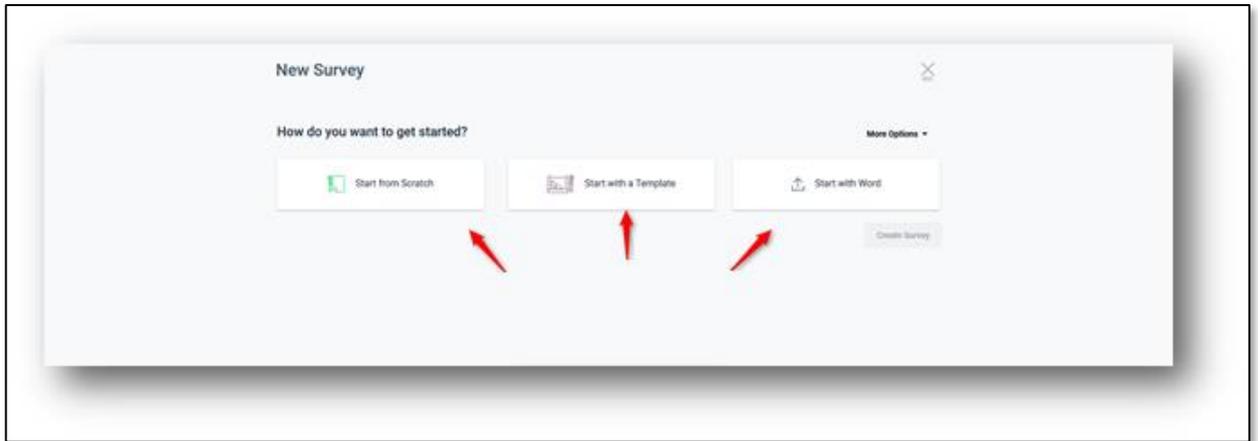
1. The first time in the platform, you can add an Example Survey with existing questions. Simply click on “Add an Example Survey.”



2. You can also create a New Survey by clicking on “New Survey.”

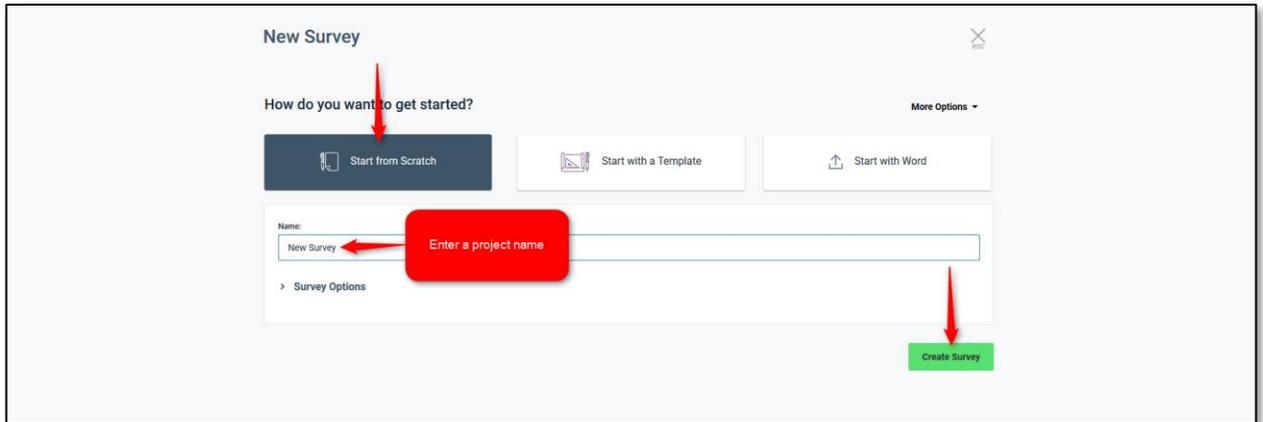


3. There are 3 ways to start a new survey: "Start from Scratch", "Start with a Template", or "Start from Word".

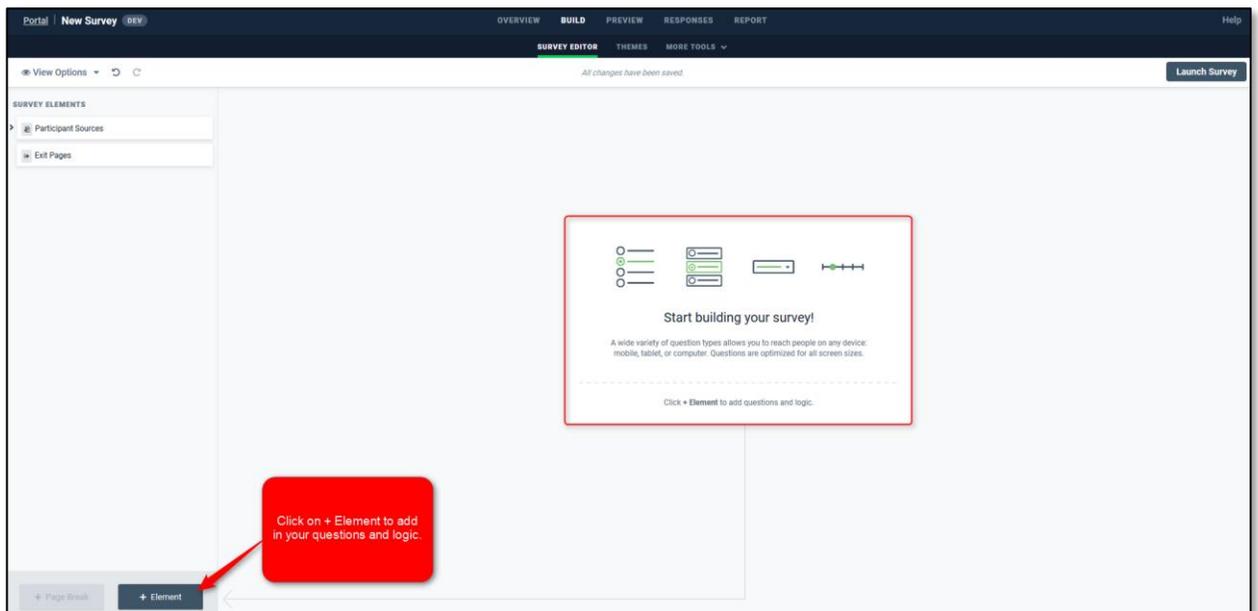


Start from Scratch

1. To create a New Survey from scratch, click on “Start from Scratch”, enter a project name and Survey Options, then click on “Create Survey.”

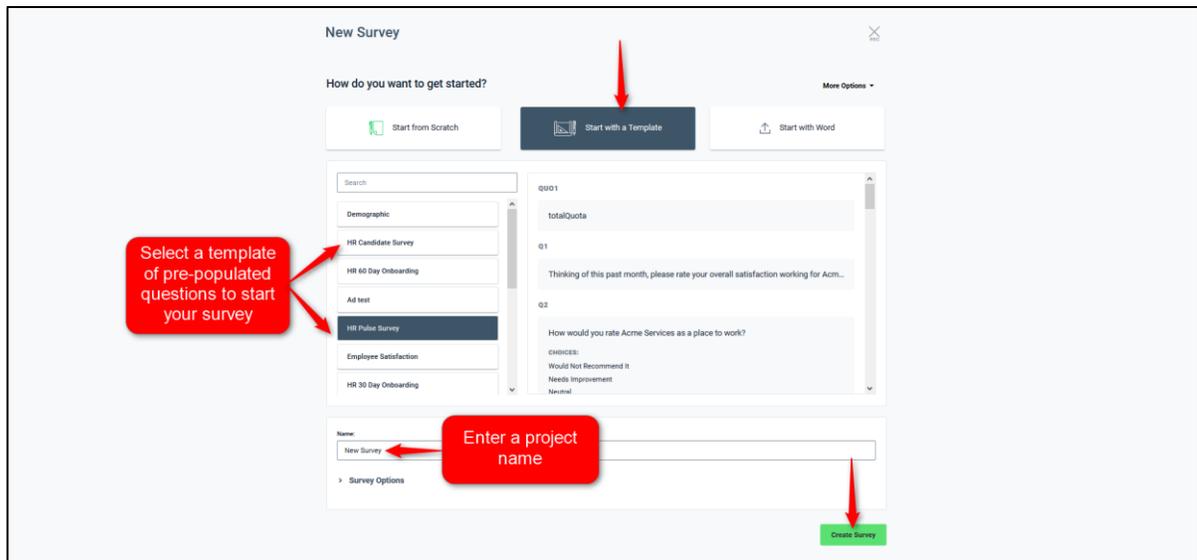


2. Build your survey by clicking on “+ Element” to add in your questions and logic.

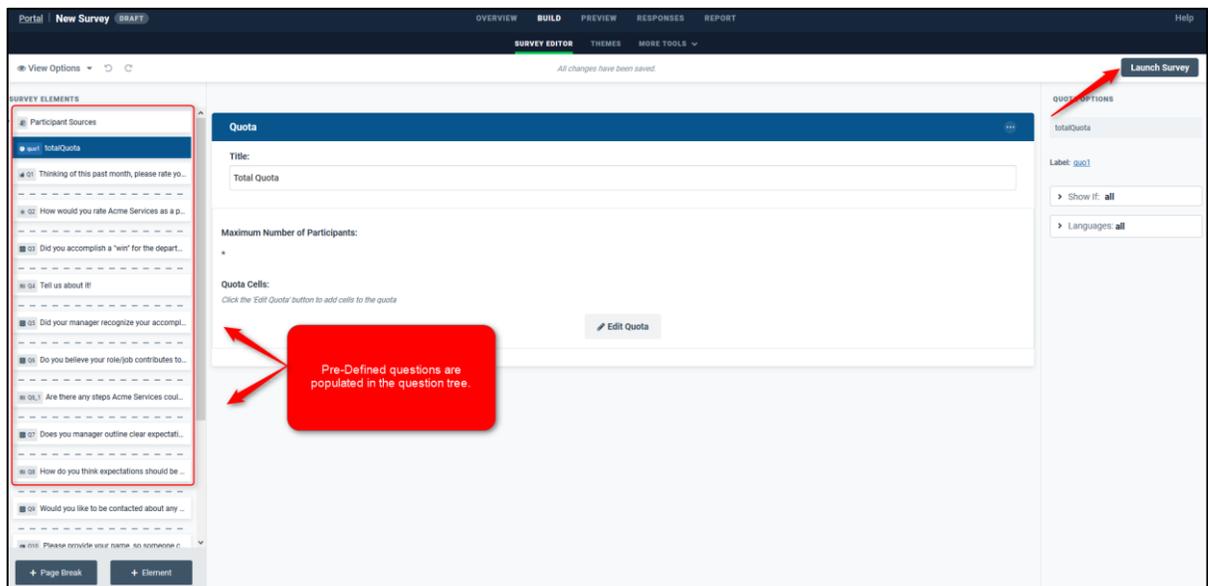


Start with a Template

1. To create a New Survey from a pre-made template, click on “Start with a Template”, choose the pre-made template to use, enter a project name and Survey Options, then click “Create Survey.”



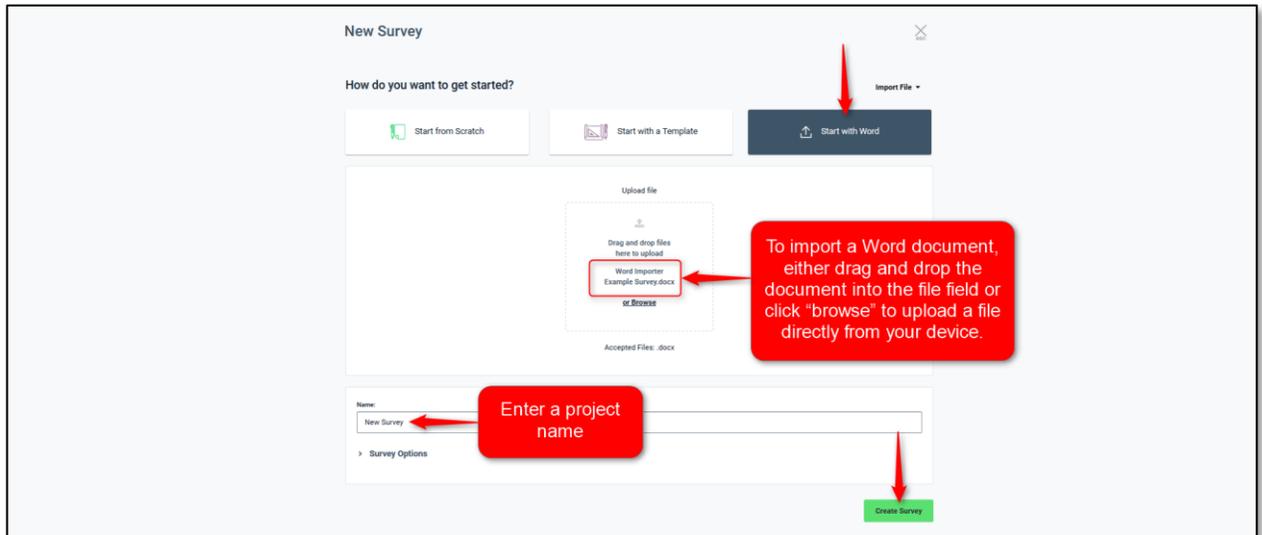
2. Pre-defined questions will populate the survey. Make modifications, additions, or deletions. Click on “Launch Survey” to launch your survey live.



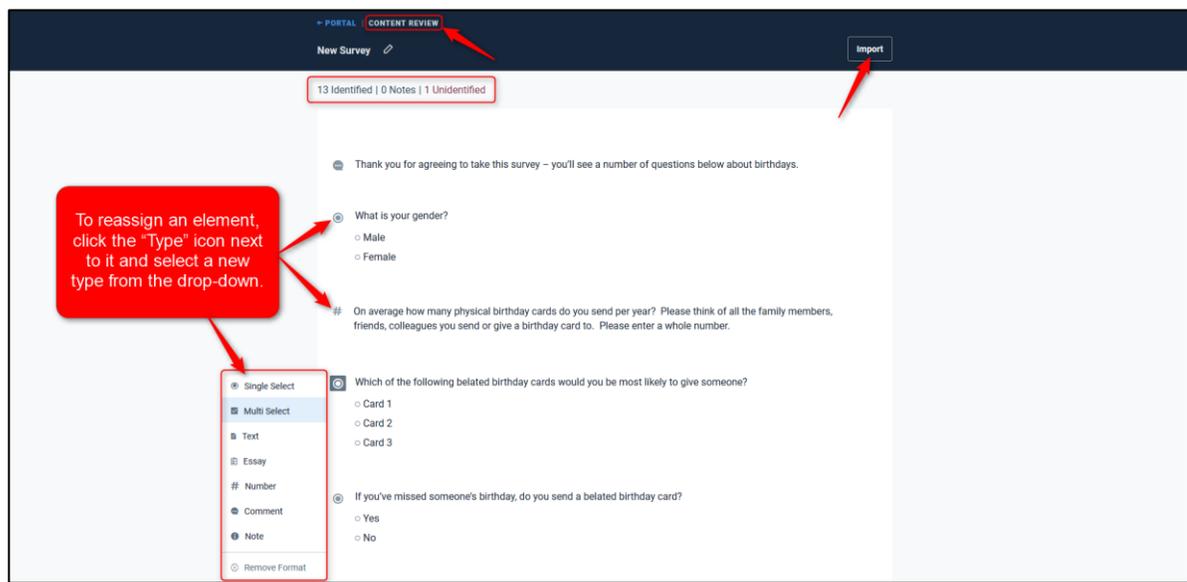
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Start with Word

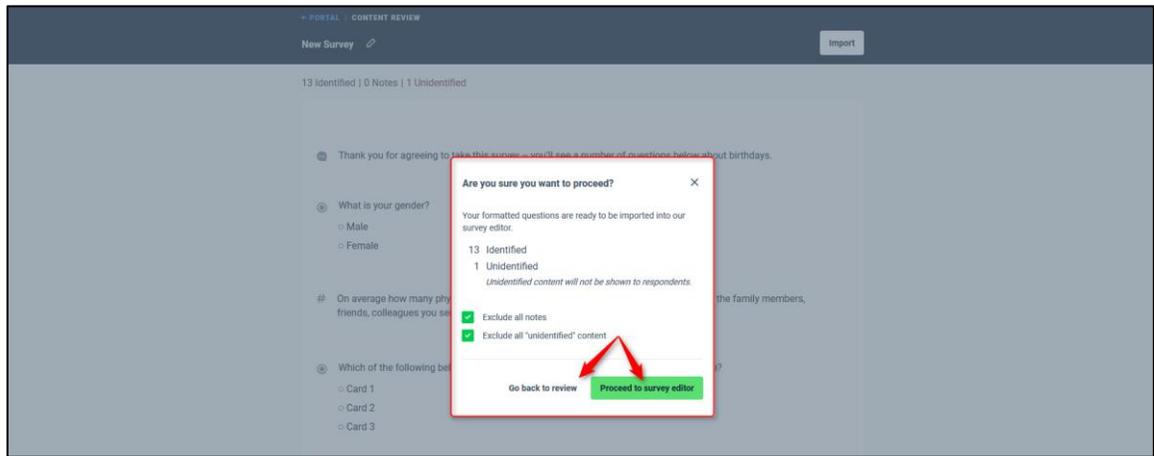
1. To create a New Survey from a Word Document, click on “Start with Word”, choose a Word Document to import, enter a project name and Survey Options, then click on “Create Survey.”



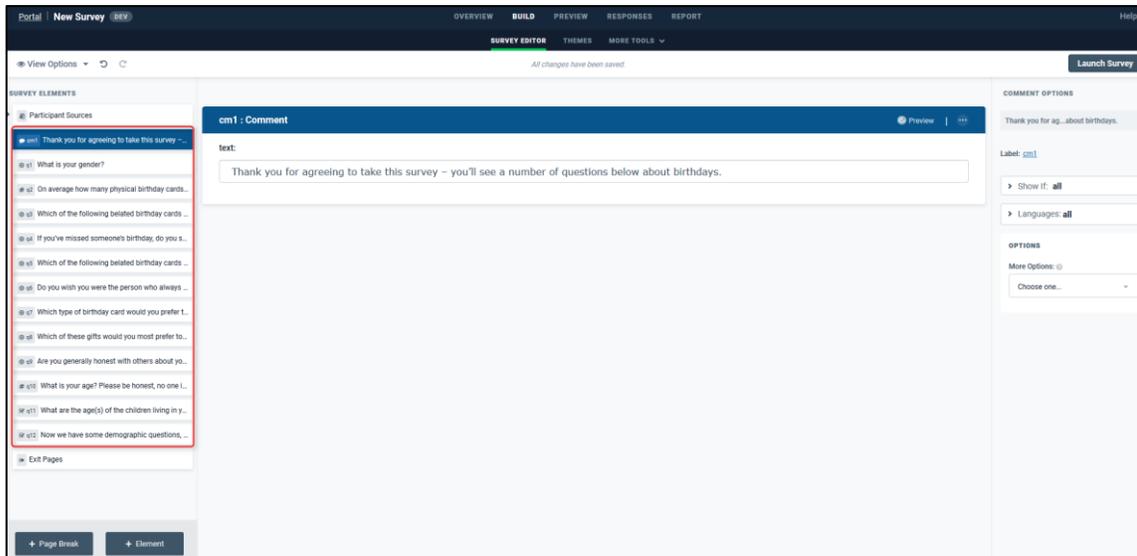
2. The AI-powered engine suggests question types based on the question wording. Content that is recognized will be converted and displayed as Identified. Content that is unrecognized will display as Unidentified. During this step, you can reassign a survey element by clicking on the icon at the left of each question, and edit, add, or remove content. Once you've finalized your content, click on “Import.”



3. A confirmation pop-up window summarizing the content will display with options. Here you can exclude notes as well as unidentified content. Once you've made your selections, click on "Proceed to survey editor."



4. Survey elements and response options are now imported into your Forsta Survey. From here, you can continue customizing your survey making additions, deletions and edits.



[Click here](#) for more in-depth information about importing a Word Document.

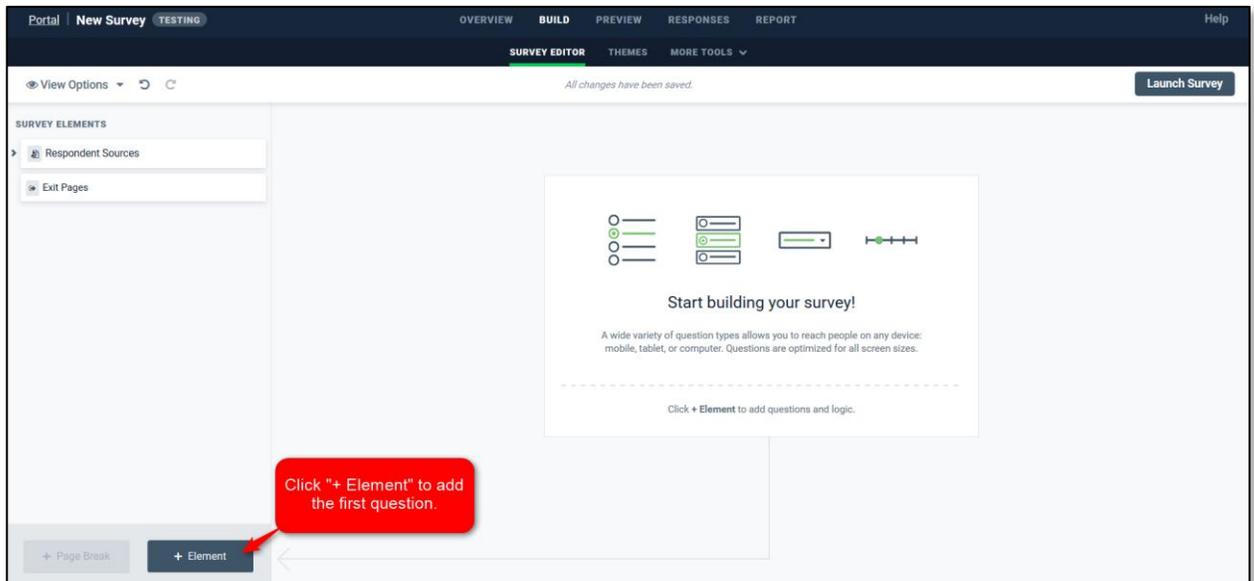
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Building a Survey

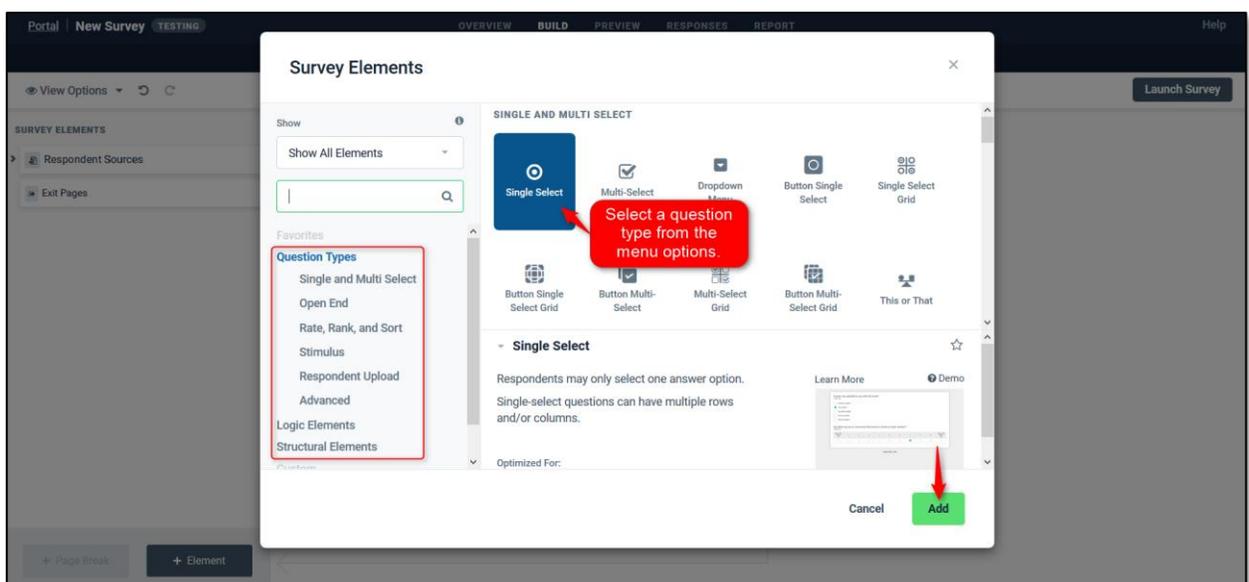
The Survey Editor is a point and click interface for you to quickly add questions to your survey.

Add a Survey Element

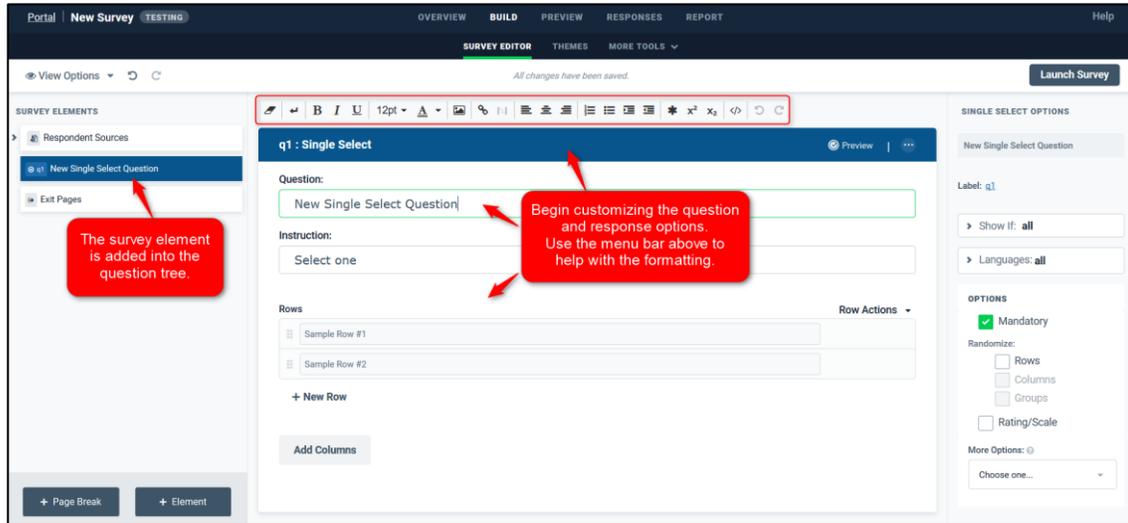
1. Click on “+ Element” to add the first question.



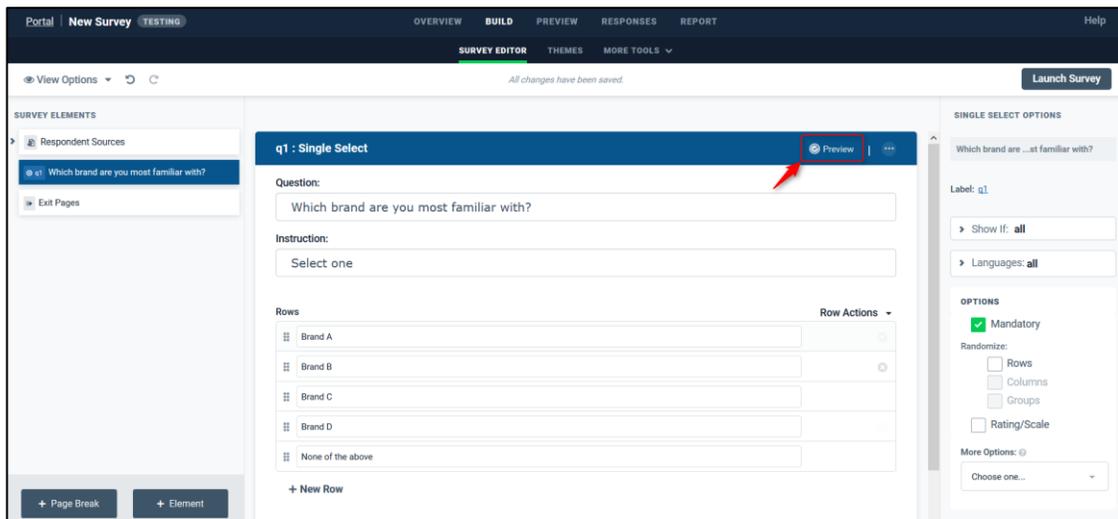
2. A menu with survey elements will appear. Elements are broken down by category on the left. Browse through the question types, select the one you want, then click “Add.”



- The survey element will be added to the question tree on the left side of the screen. Each element is templated making it easy to modify. To begin customizing, click into any of the fields in the middle of the screen. The menu bar at the top of the screen will help you with formatting.



- To preview the question as a respondent would see it, click the “Preview” link located in the top right corner of the element. The preview of the element opens in a new tab in your browser.

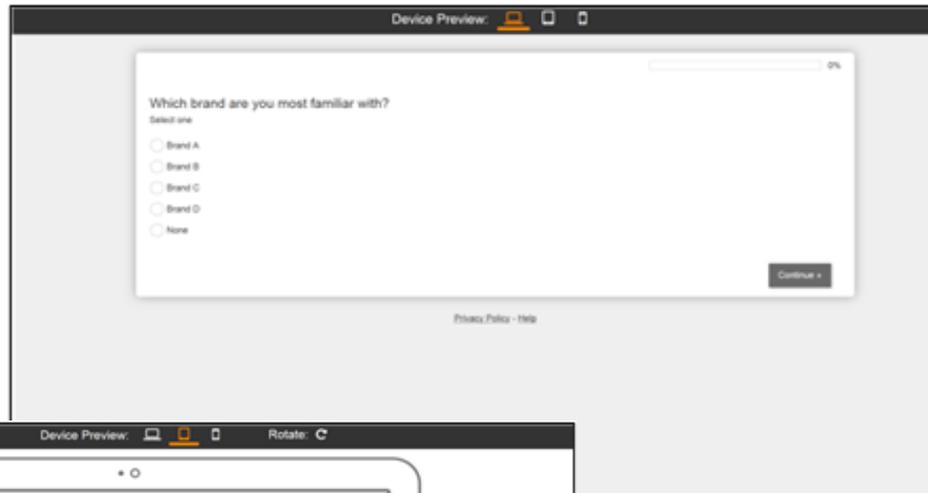


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Preview Questions

Device preview shows how questions will render on desktop, tablet, or smartphone.

Desktop View



Tablet View



Smartphone View

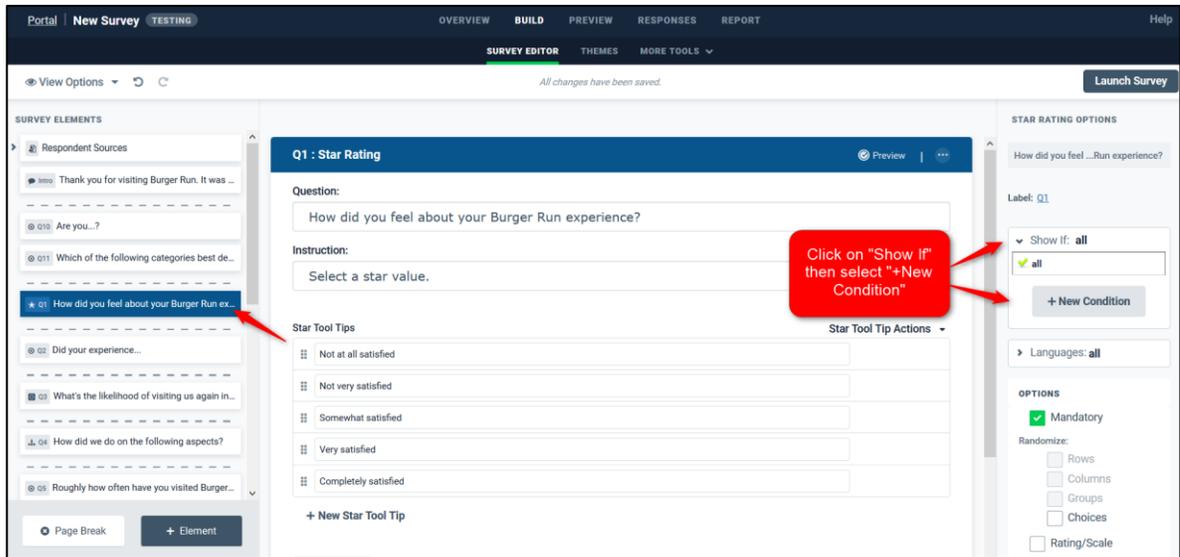


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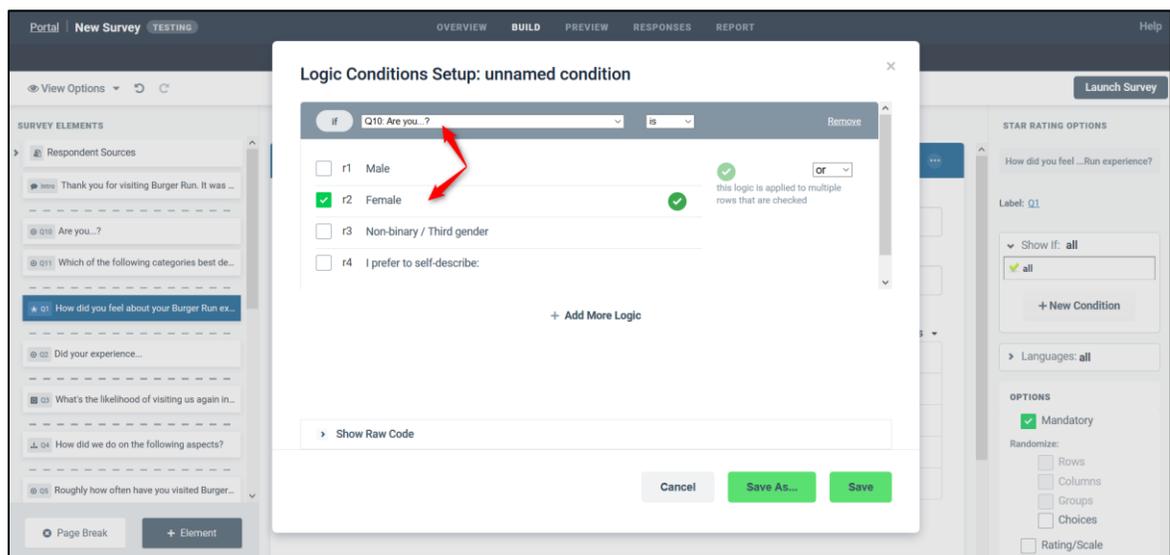
Add Question Logic

You can add simple survey logic directly to a question or response option using the Survey Editor.

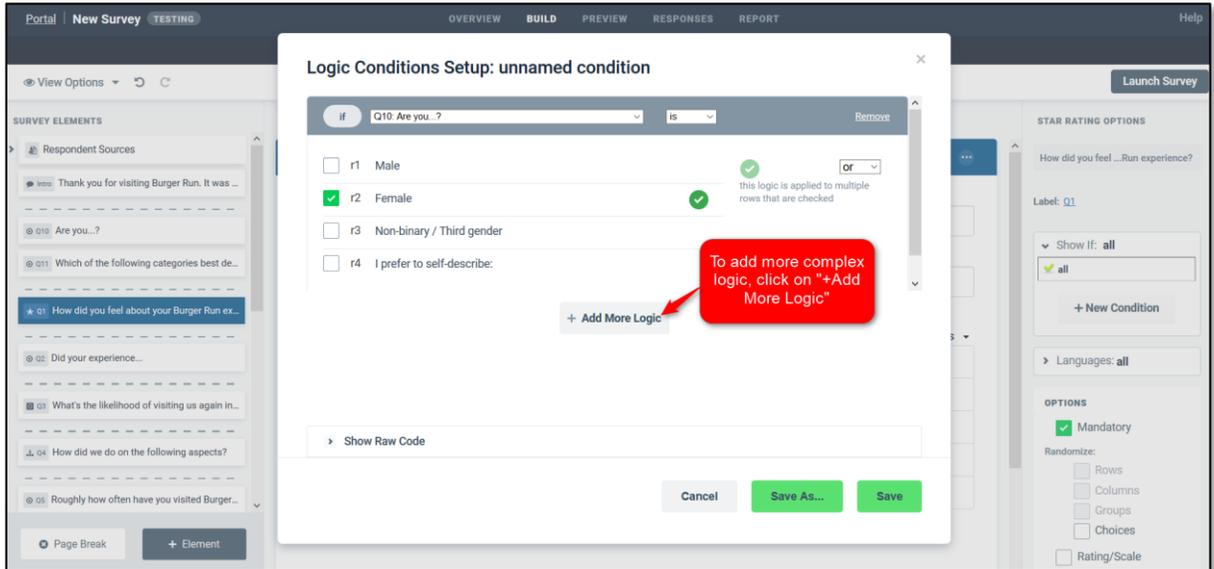
1. Select a question from the question tree, then click "Show If" on the right. Click "New Condition" to create a new logic condition for the question or choose a saved condition from the list.



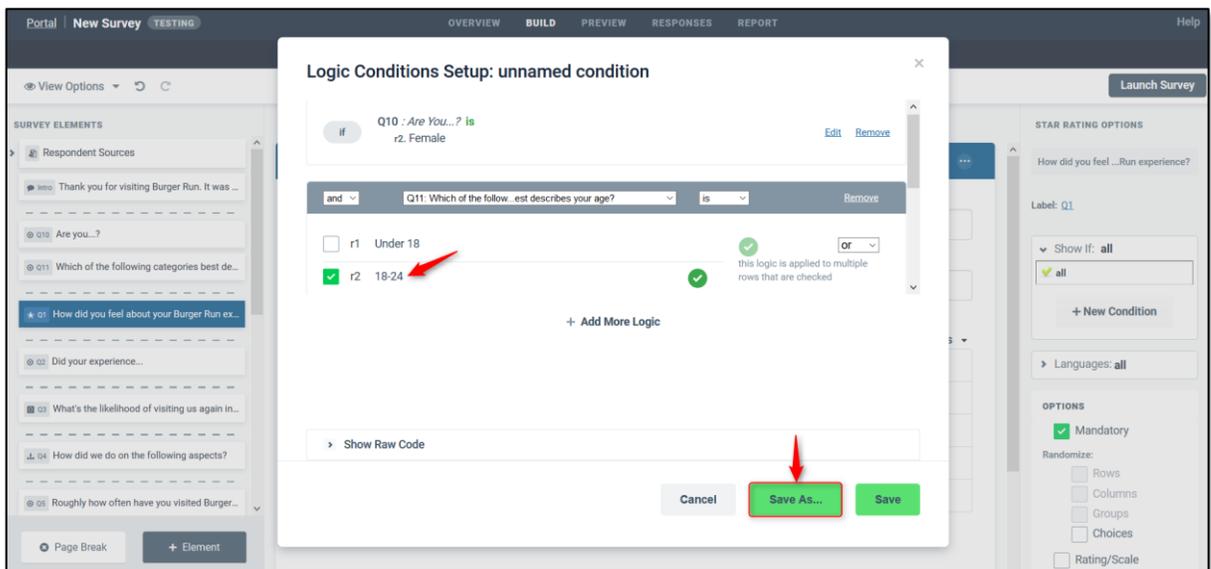
2. Select a question from the dropdown menu, then select the answer choices that will define the logic.



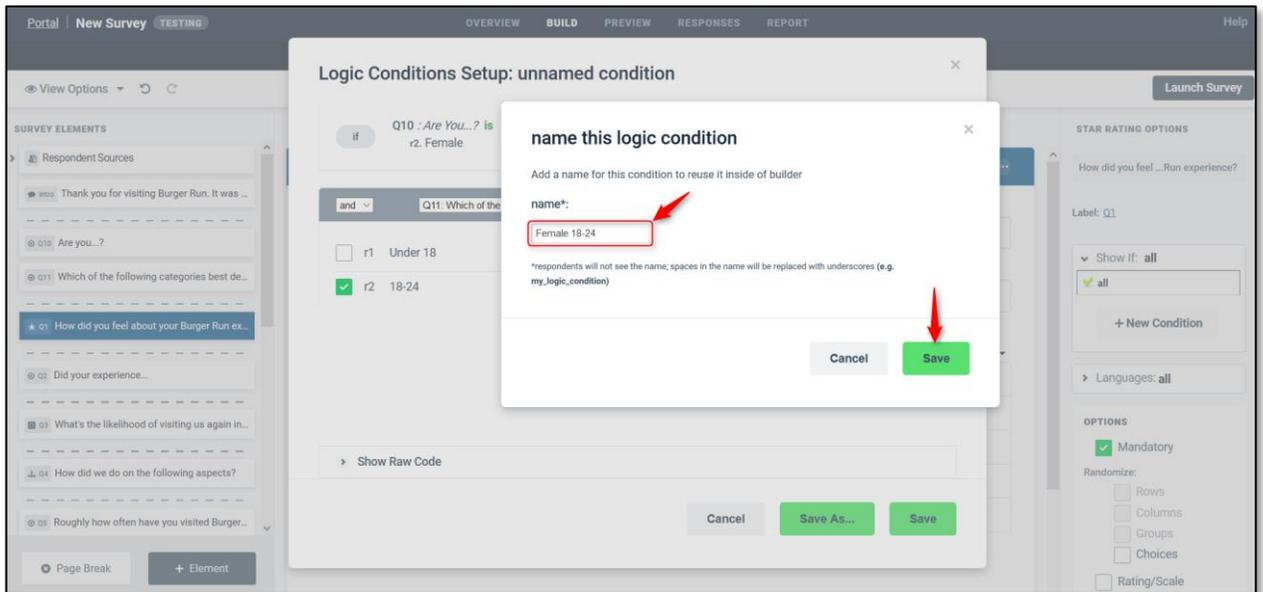
3. To add additional logic, select “+ Add More Logic.”



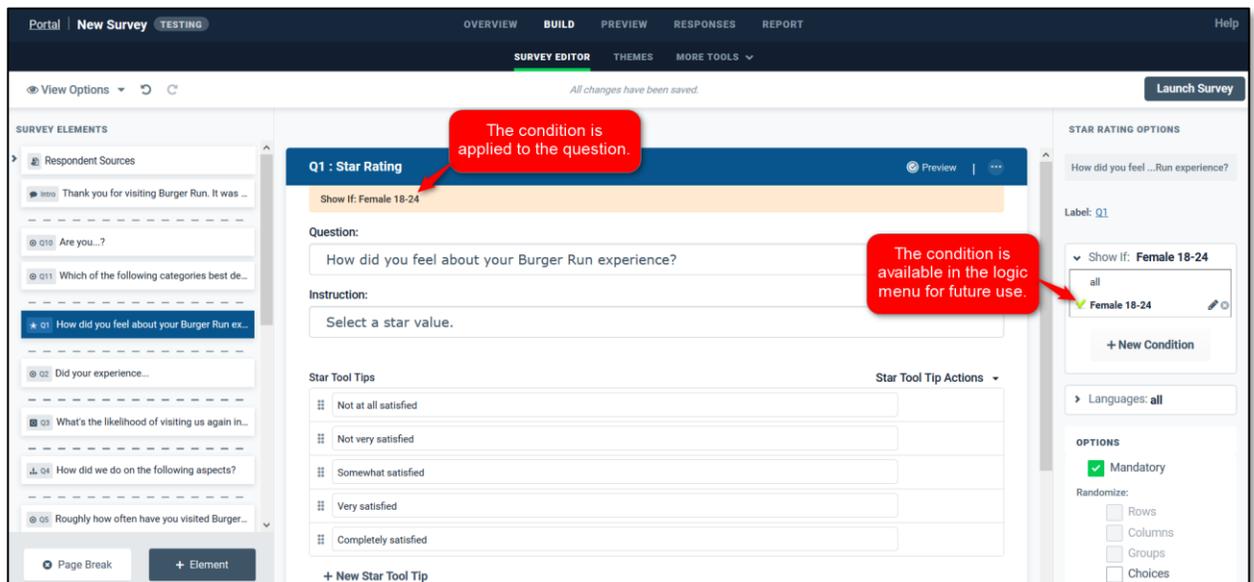
4. Select another question from the dropdown menu and the answer choices you want. When finished, click “Save As.”



5. Enter a name for your logic condition, then click “Save.”



6. The condition will be applied to your question. It is also saved in a list on the right side of the screen making it easily accessible to apply to other questions in your survey.



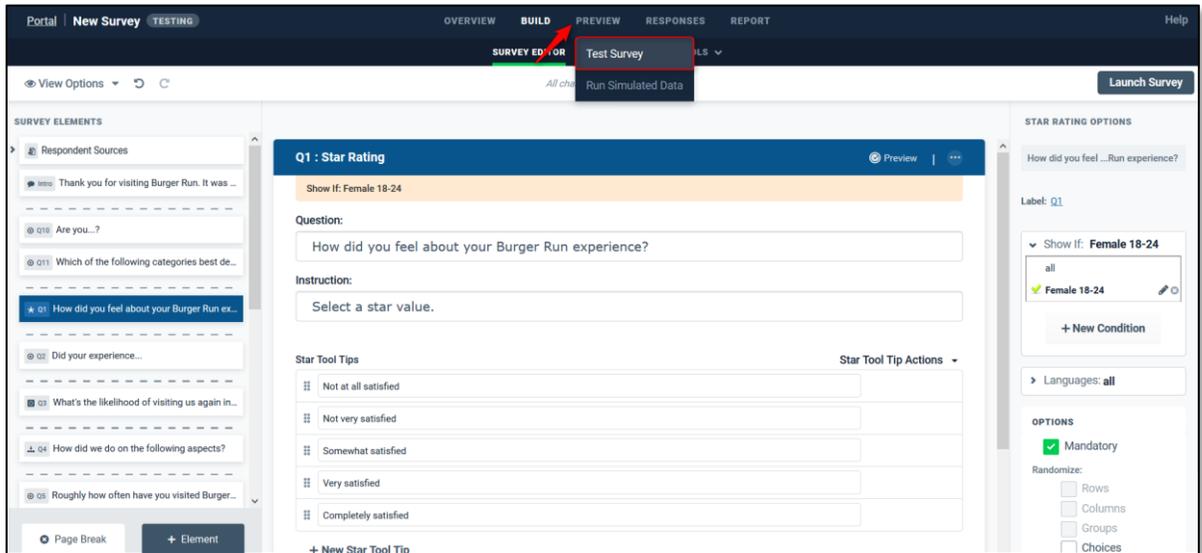
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Test a Survey

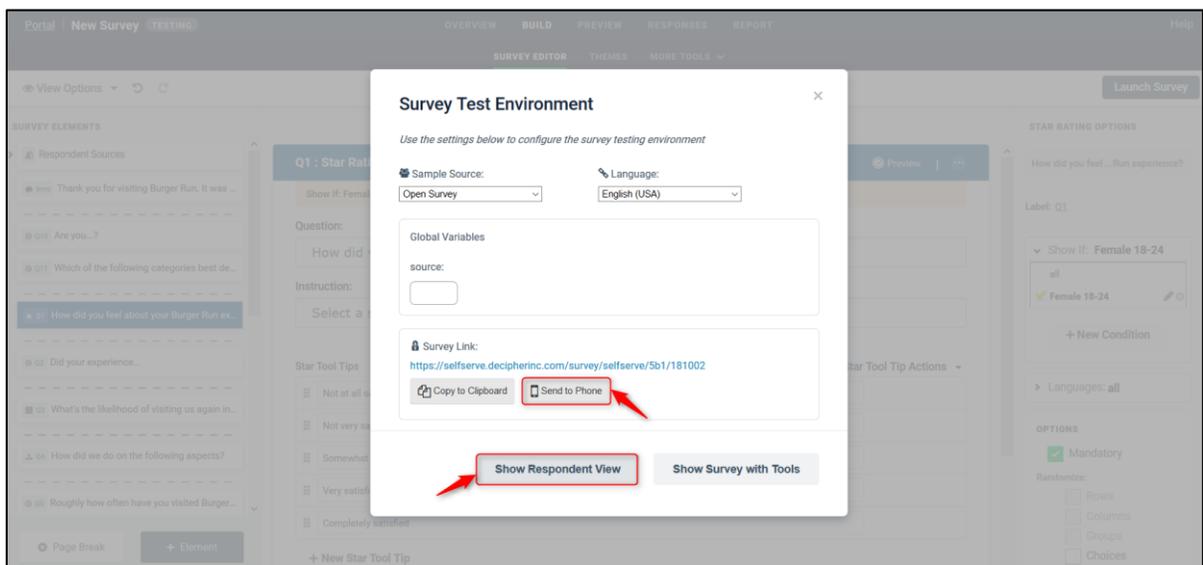
Easily review your survey and check each question for errors before it goes live. Use the survey testing system to check logic, skip paths, question settings and text.

Preview the Survey

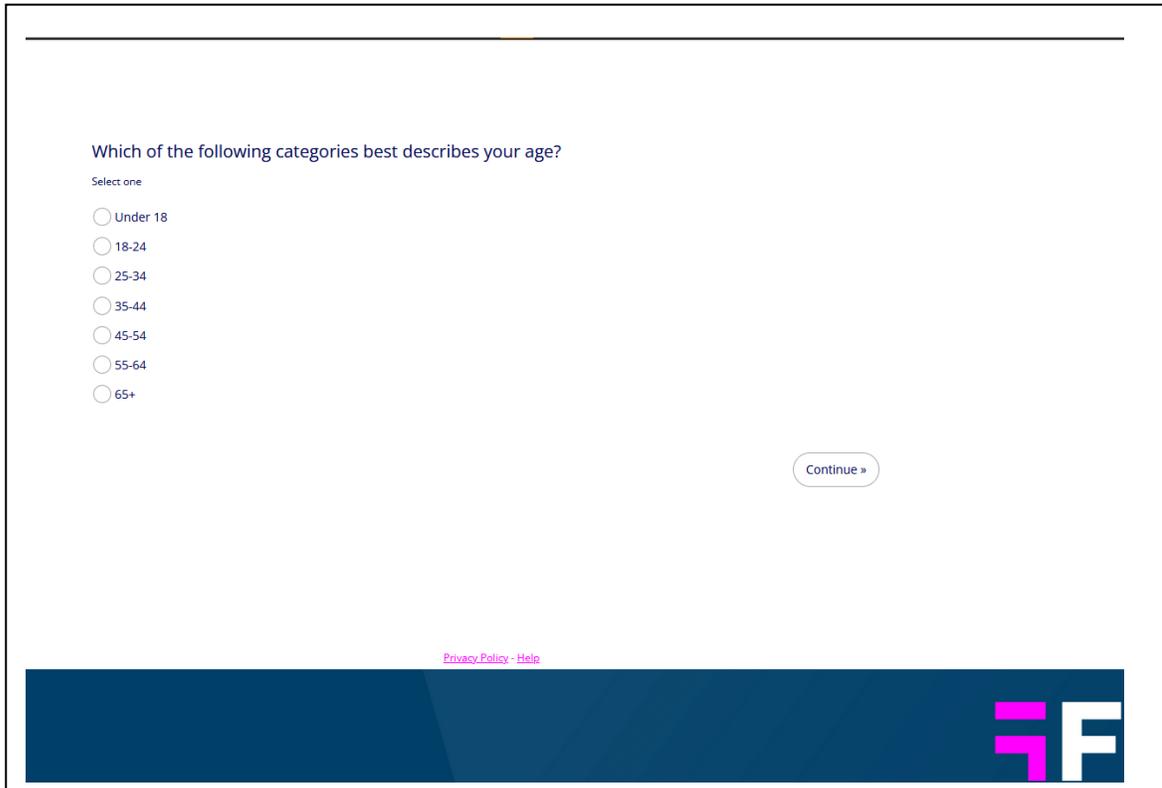
1. Click “Preview” from the menu options, then select “Test Survey”.



2. Click “Show Respondent View” to manually test the survey. Click “Send to Phone” to send a link to your phone (available in the U.S. and Canada).



3. A new window will open allowing you to see the survey as a respondent would see it. Here you can test the entire survey to make sure it is rendering the way you intended.



Which of the following categories best describes your age?

Select one

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+

[Continue »](#)

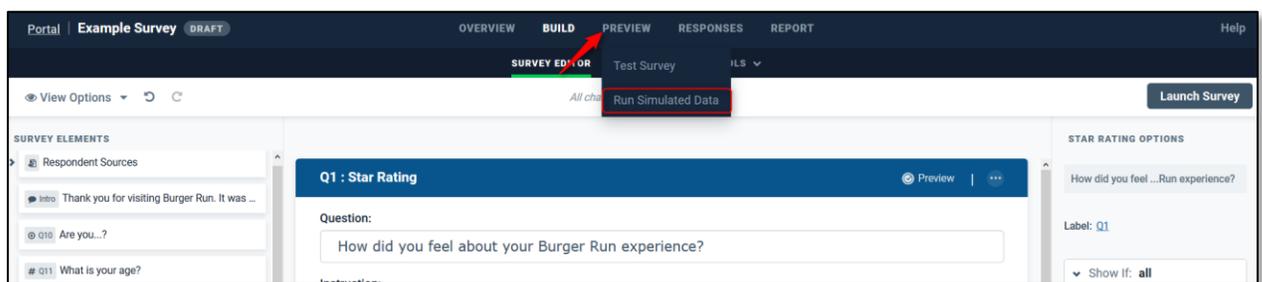
[Privacy Policy - Hilfe](#)



Run Simulated Data

An important step in completing any Forsta Surveys project is running simulated data through your survey. The Run Simulated Data feature looks for errors in survey logic or survey flow by forcing simulated data through your survey. By generating enough data to populate all survey questions and hidden elements, this process also allows for thorough testing of the report to help verify that skips and question logic has been defined properly.

1. To run Simulated Data, click on “Preview” from the menu options, then select “Run Simulated Data”.



2. Click on “Configure Test Simulation” if you want to run your test data with options, then click “Run Test Data”.

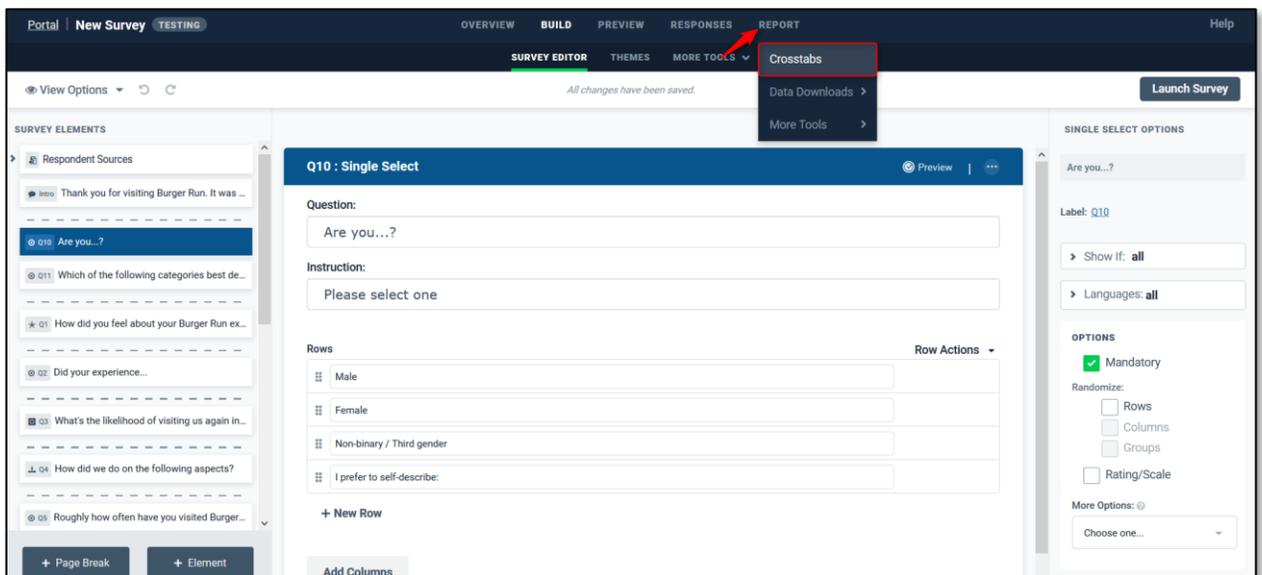


Reporting

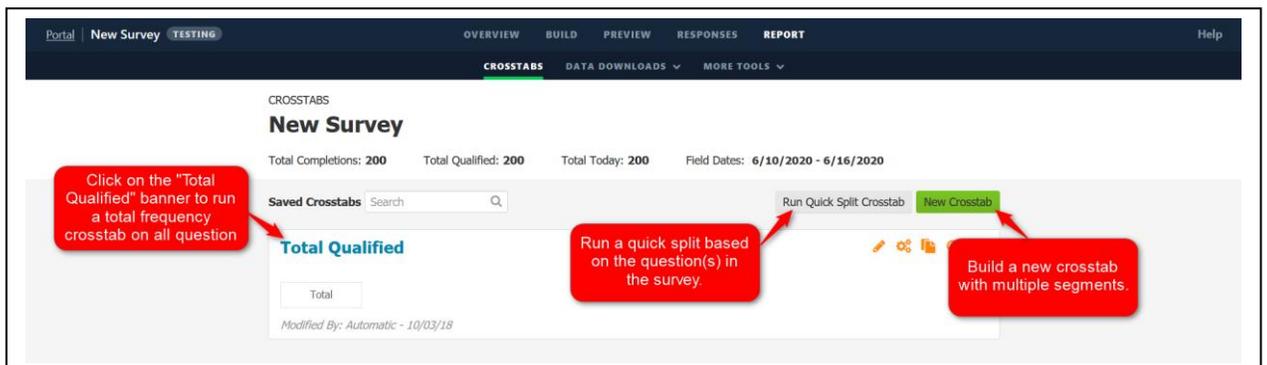
The Crosstabs reporting system is designed to improve the speed and ease of crosstab creation. Pre-defined tables are generated for all question and answer combinations allowing users to quickly select the tables they desire by the segments they wish to view. Additionally, users have the power to define nets, create summary tables, update table text & add desired statistics.

Running Crosstabs

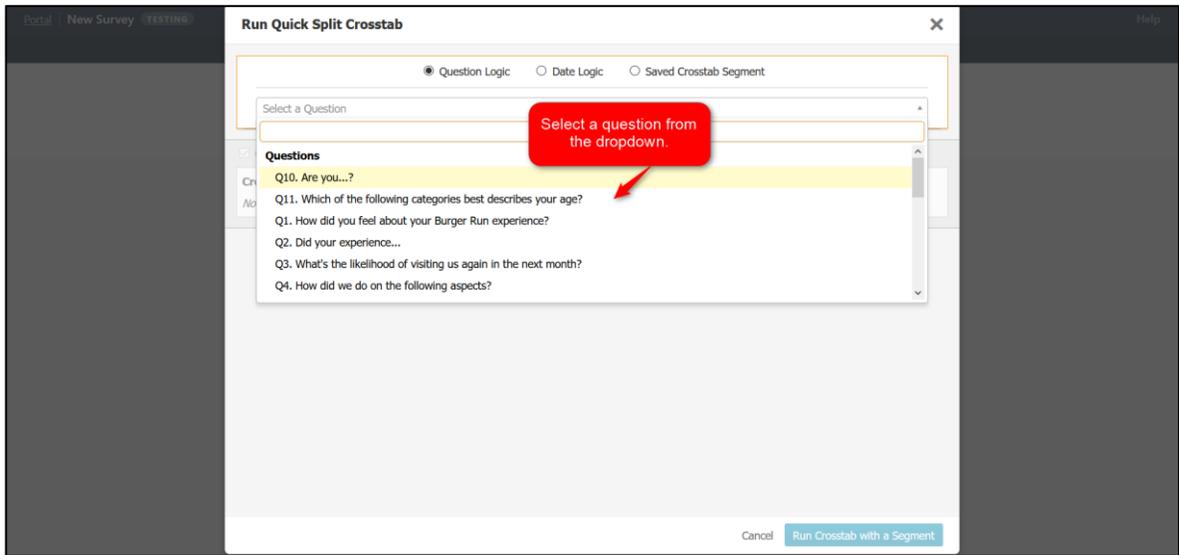
1. To run Crosstabs, click on “Report” from the menu options, then select “Crosstabs”.



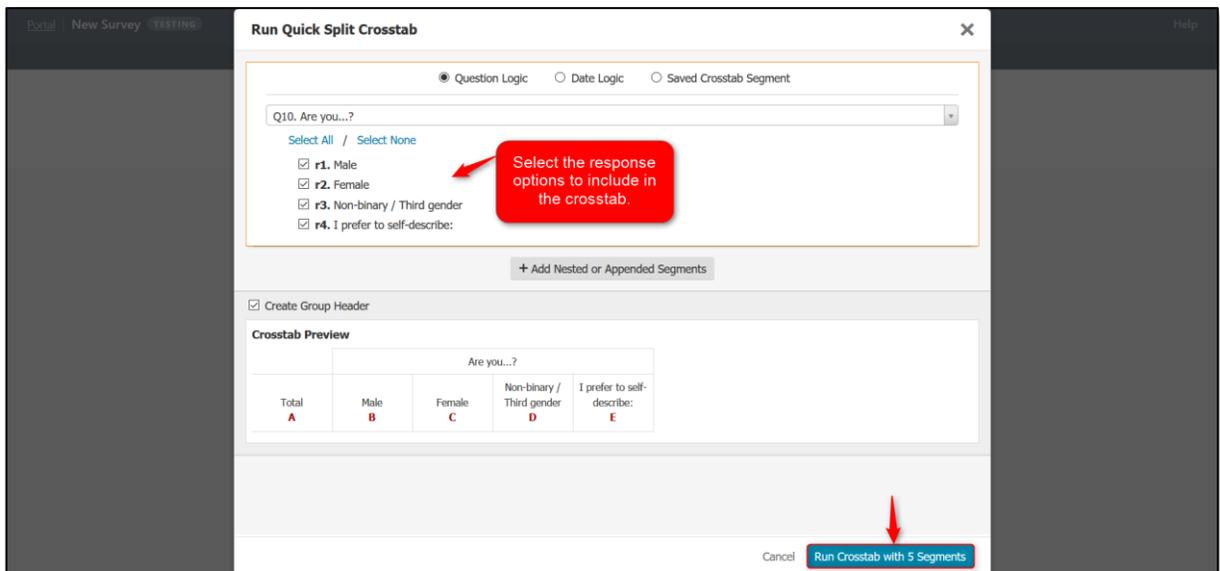
2. A new screen will appear giving you three options for running crosstabs, Total Qualified, Run Quick Split Crosstab, and New Crosstab. For this example, we'll select “Run Quick Split Crosstab.”



3. Select a question from a dropdown menu to build your new crosstab with a specific banner. In this example, we are choosing the gender question.



4. Select the response options to include in your crosstab, then click “Run Crosstab with Segments” at the bottom of the screen.



5. Results: The tables now have a gender banner.

Quick Split: Are you...? [Edit Crosstab](#) [Save](#)

Settings [Edit Settings](#)

Respondents: **Qualified Only** % Base: **Total Answering** Stat Test Levels: **95% / 90%**
 Table Set: **All** Data Weighting: **None** Stat Test Groups: **B-E**

Date Range: All (10/03/18 - 10/03/18) Additional Filter: None

Segment Summary
 Click segment name to show logic definition

	Total	Male	Female	Non-binary / Third gender	I prefer to self-describe:
	A	B	C	D	E
Total in Segment	200	49 *	51 *	51 *	49 *

* Warning: Small Sample Size

6. To add a chart to any question, click on the Menu icon and select Add/Edit Charts from the dropdown.

I prefer to self-describe: 25% 0% 0% 0% 100% BCD
 49 0 0 0 49

Q11 Which of the following categories best describes your age?

	Total	Male	Female	Non-binary / Third gender	I prefer to self-describe:
	A	B	C	D	E
Total	100%	100%	100%		
	200	49 *	51 *		
Under 18	12%	20% E	10%		
	23	10	5		
18-24	14%	12%	22% D	6%	14%
	27	6	11	3	7
25-34	12%	8%	12%	14%	14%
	24	4	6	7	7
35-44	16%	12%	22%	16%	14%
	32	6	11	8	7
45-54	16%	20% C	8%	16%	18%
	31	10	4	8	9
55-64	15%	14%	10%	16%	20%
	30	7	5	8	10
65+	17%	12%	18%	24%	12%
	33	6	9	12	6

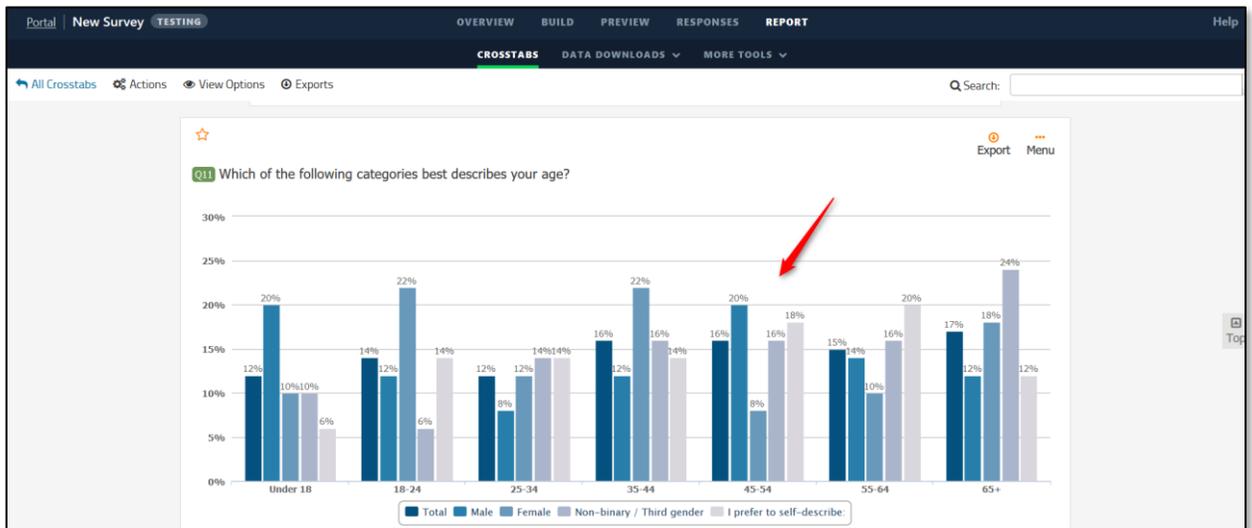
Export Menu [Add/Edit Charts](#)

7. Choose from five different chart types, then click “Save.”

The screenshot shows the 'Add/Edit Chart' dialog box in the Forsta software. The dialog has a title bar with 'Add/Edit Chart' and a close button. Below the title bar, there is a 'Charts' section with a checked 'Frequency Data' option. A dropdown menu is open, showing five options: 'Column Chart', 'Bar Chart', 'Column Chart', 'Pie Chart', 'Area Chart', and 'Line Chart'. A red callout bubble with the text 'Choose from 5 different charts.' points to the dropdown menu. A red arrow points to the 'Save' button in the bottom right corner of the dialog. The background shows a survey question: 'Which of the following categories best describes your age?' with a table of results.

	Total	Male	Female	Non-binary / Third gender	I prefer to self-describe:
Total	100%	100%	100%	100%	100%
Under 18	20	49 *	51 *	49 *	49 *
18-24	12%	20% E	10%	10%	6%
25-34	23	10	5	5	3
35-44	14%	12%	22% D	6%	14%
45-54	27	6	11	3	7
55-64	12%	8%	12%	14%	14%
65+	24	4	6	7	7
	32	6	11	8	7
	16%	20% c	8%	16%	18%
	31	10	4	8	9
	15%	14%	10%	16%	20%
	30	7	5	8	10
	17%	12%	18%	24%	12%
	33	6	9	12	6

8. Results:



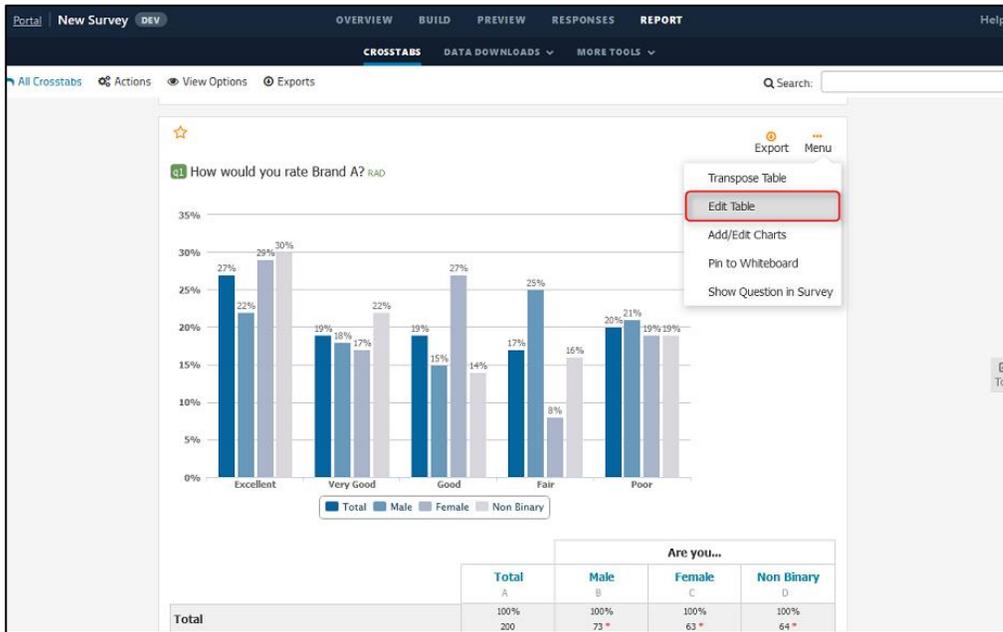
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Edit Table

Adding Nets

Question tables can be configured using the Table Editor in Crosstabs. Edit the table to apply nets and statistics.

1. Click Menu at the top right of the question and select “Edit Table.”



2. Click “+Table Row”

The screenshot shows the 'Table Editor' interface for the question 'How would you rate Brand A?'. It displays a list of table rows with columns for 'Show', 'Row Title', 'Sort Lock', 'Include in Base', and 'Stat Values'. The '+ Table Row' button is highlighted in red. The table rows are: Excellent, Very Good, Good, Fair, and Poor.

Show	Row Title	Sort Lock	Include in Base	Stat Values
<input checked="" type="checkbox"/>	Excellent	u ¹	<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	Very Good	u ¹	<input checked="" type="checkbox"/>	2
<input checked="" type="checkbox"/>	Good	u ¹	<input checked="" type="checkbox"/>	3
<input checked="" type="checkbox"/>	Fair	u ¹	<input checked="" type="checkbox"/>	4
<input checked="" type="checkbox"/>	Poor	u ¹	<input checked="" type="checkbox"/>	5

3. Click on Net

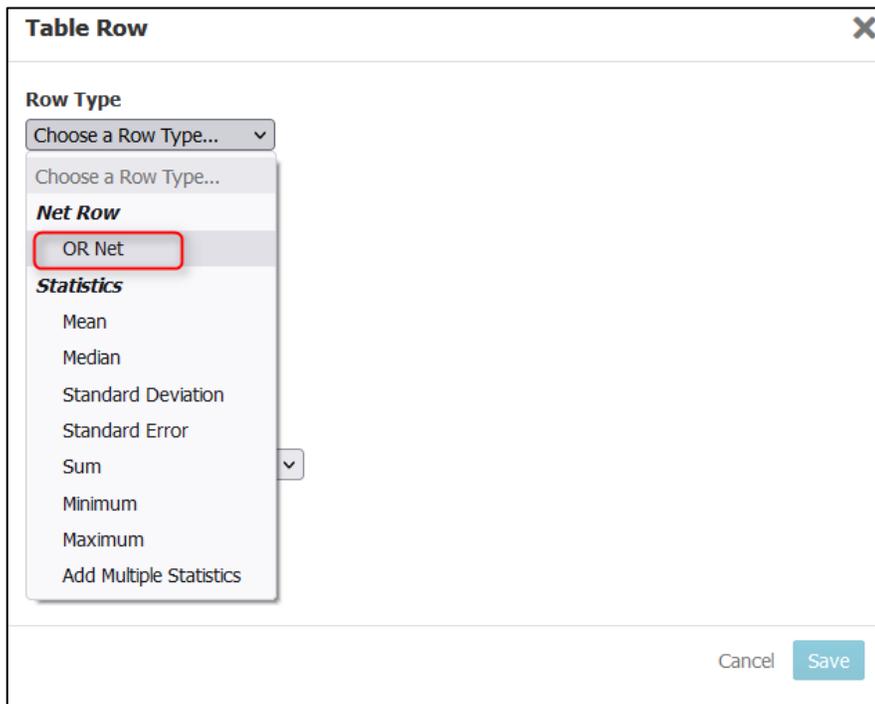


Table Row [X]

Row Type

Choose a Row Type... ▾

Choose a Row Type...

Net Row

OR Net

Statistics

Mean

Median

Standard Deviation

Standard Error

Sum ▾

Minimum

Maximum

Add Multiple Statistics

Cancel Save

4. Enter a name for the Net and choose which table rows to include in the net.

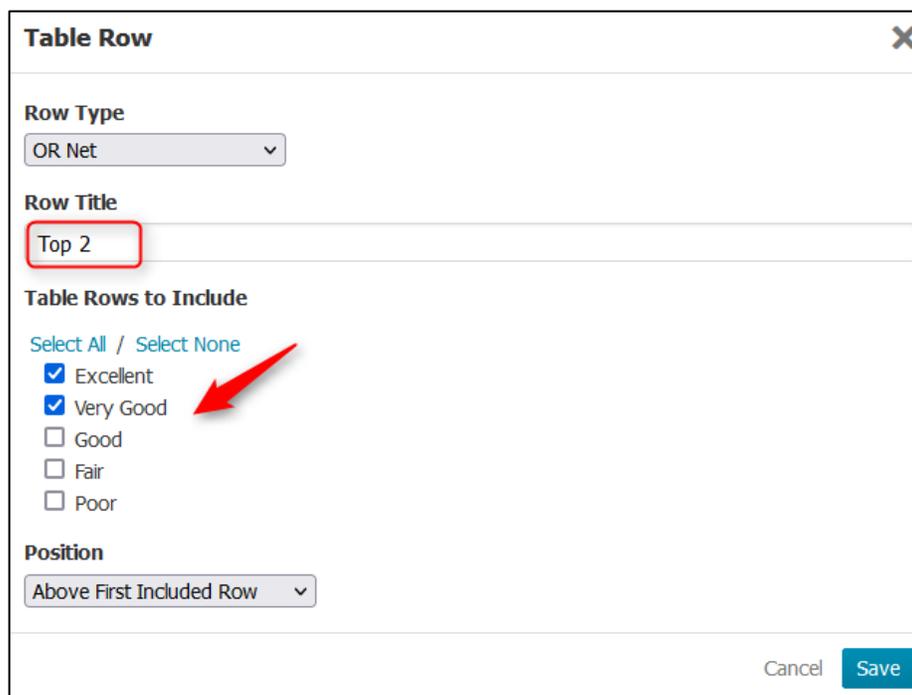


Table Row [X]

Row Type

OR Net ▾

Row Title

Top 2

Table Rows to Include

Select All / Select None

Excellent

Very Good

Good

Fair

Poor

Position

Above First Included Row ▾

Cancel Save

5. Results:

Portal | New Survey | DEV | OVERVIEW | BUILD | PREVIEW | RESPONSES | REPORT | Help

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q1 How would you rate Brand A? RAD

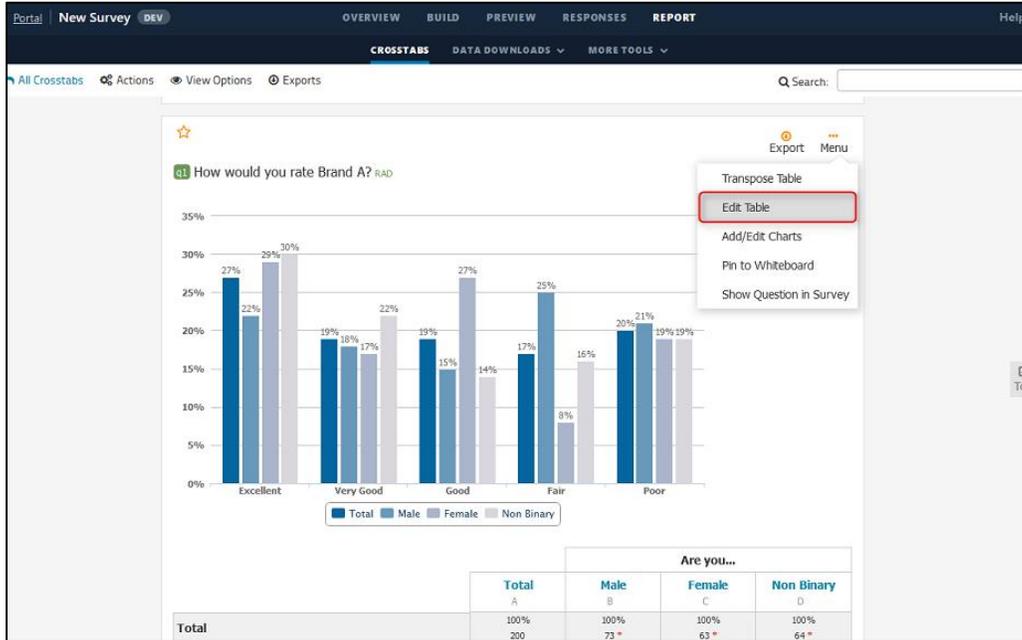
	Total	Are you...		
		A	Male	Female
Total	100%	100%	100%	100%
	200	73 *	63 *	64 *
Top 2	46%	40%	46%	52%
	91	29	29	33
1 Excellent	27%	22%	29%	30%
	53	16	18	19
2 Very Good	19%	18%	17%	22%
	38	13	11	14
3 Good	19%	15%	27% bd	14%
	37	11	17	9
4 Fair	17%	25% C	8%	16%
	33	18	5	10
5 Poor	20%	21%	19%	19%
	39	15	12	12

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Adding Statistics

1. To add statistical summaries to the tables, use the Table Editor in Crosstabs.



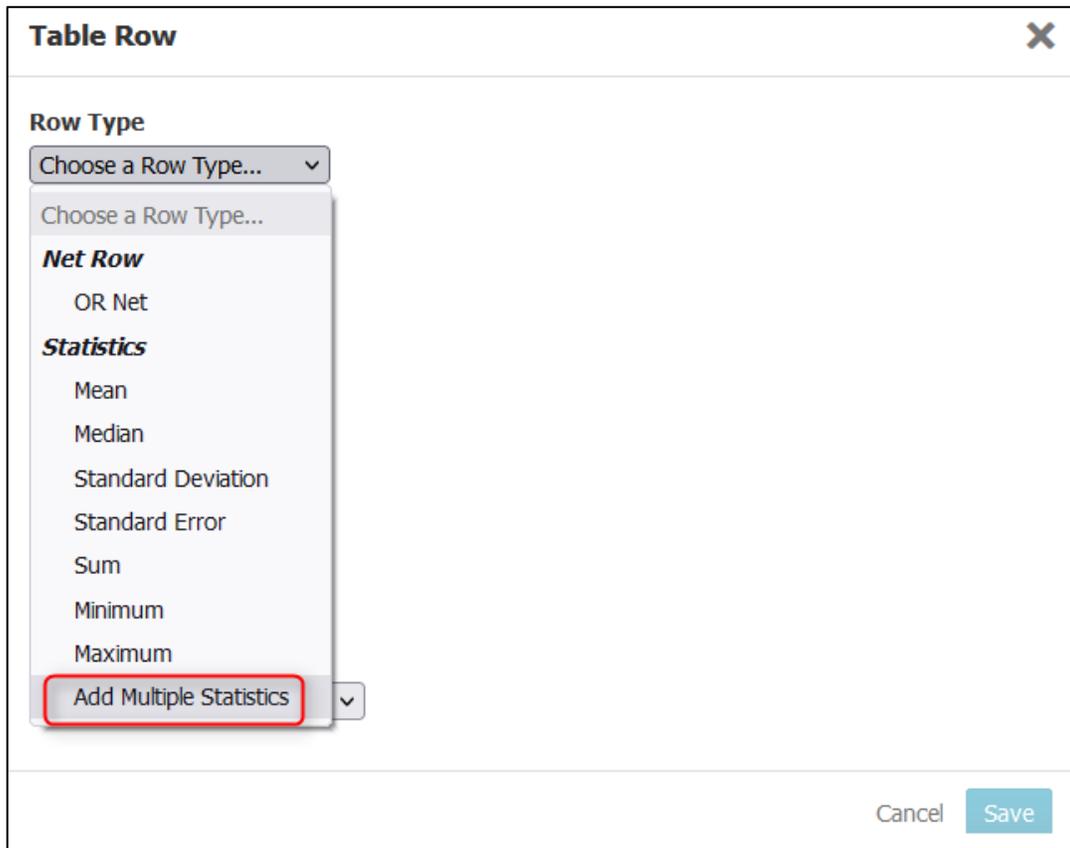
2. Click "+Table Row"

The 'Table Editor' window is open, showing the configuration for the table. The question title is 'How would you rate Brand A?'. The table has five rows corresponding to the response categories: Excellent, Very Good, Good, Fair, and Poor. The '+ Table Row' button is highlighted with a red box.

Show	Row Title	Sort Lock	Include in Base	Stat Values
<input checked="" type="checkbox"/>	Excellent	#1	<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	Very Good	#1	<input checked="" type="checkbox"/>	2
<input checked="" type="checkbox"/>	Good	#1	<input checked="" type="checkbox"/>	3
<input checked="" type="checkbox"/>	Fair	#1	<input checked="" type="checkbox"/>	4
<input checked="" type="checkbox"/>	Poor	#1	<input checked="" type="checkbox"/>	5

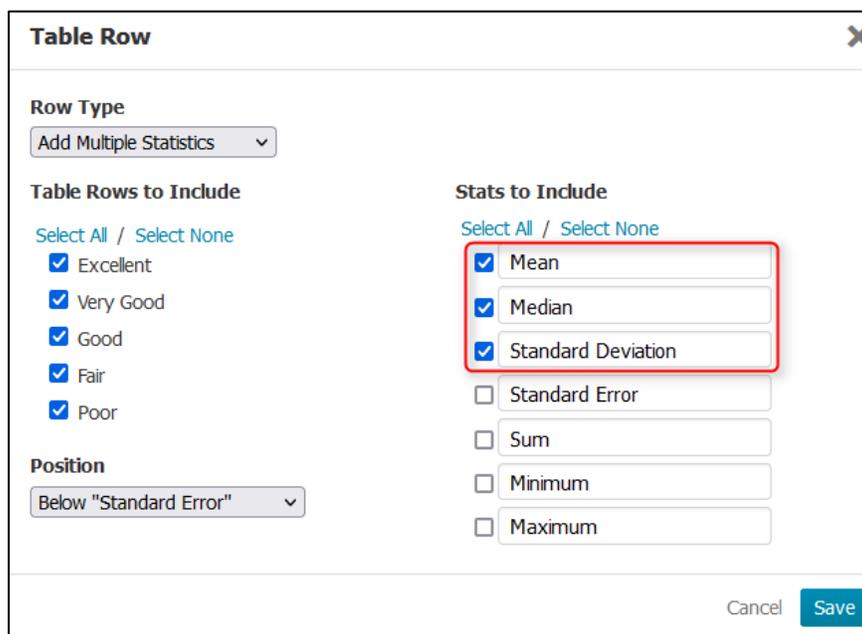
At the bottom of the window, the filter is set to '+Table Filter', the % Base is 'Total Answering', and the Base Description is 'Automatic'. There are 'Cancel' and 'Save' buttons at the bottom right.

- Choose individual statistics or click "Add Multiple Statistics" if you want to apply more than one statistic at a time.



The screenshot shows the 'Table Row' dialog box with the 'Row Type' dropdown menu open. The menu lists options under 'Net Row' (OR Net) and 'Statistics' (Mean, Median, Standard Deviation, Standard Error, Sum, Minimum, Maximum). The 'Add Multiple Statistics' option at the bottom of the menu is highlighted with a red box. The 'Cancel' and 'Save' buttons are visible at the bottom right.

- Choose the Statistics you would like to apply and click Save.



The screenshot shows the 'Table Row' dialog box with the 'Row Type' dropdown set to 'Add Multiple Statistics'. The 'Table Rows to Include' section has all options (Excellent, Very Good, Good, Fair, Poor) checked. The 'Stats to Include' section has 'Mean', 'Median', and 'Standard Deviation' checked, while 'Standard Error', 'Sum', 'Minimum', and 'Maximum' are unchecked. The 'Position' dropdown is set to 'Below "Standard Error"'. The 'Mean', 'Median', and 'Standard Deviation' options in the 'Stats to Include' section are highlighted with a red box. The 'Cancel' and 'Save' buttons are visible at the bottom right.

5. Results:

Portal | New Survey | DEV | OVERVIEW | BUILD | PREVIEW | RESPONSES | REPORT | Help

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☆ | Export | Menu

How would you rate Brand A? RAD

	Are you...			
	Total	Male	Female	Non Binary
	A	B	C	D
Total	100%	100%	100%	100%
	200	73 *	63 *	64 *
Top 2	46%	46%	46%	52%
	91	29	29	33
1 Excellent	27%	22%	29%	30%
	53	16	18	19
2 Very Good	19%	18%	17%	22%
	38	13	11	14
3 Good	19%	15%	27% bd	14%
	37	11	17	9
4 Fair	17%	25% C	8%	16%
	33	18	5	10
5 Poor	20%	21%	19%	19%
	39	15	12	12
Standard Error	0.10	0.17	0.18	0.19
Mean	2.83	3.04	2.71	2.72
Median	3.00	3.00	3.00	2.00
Standard Deviation	1.48	1.47	1.45	1.51

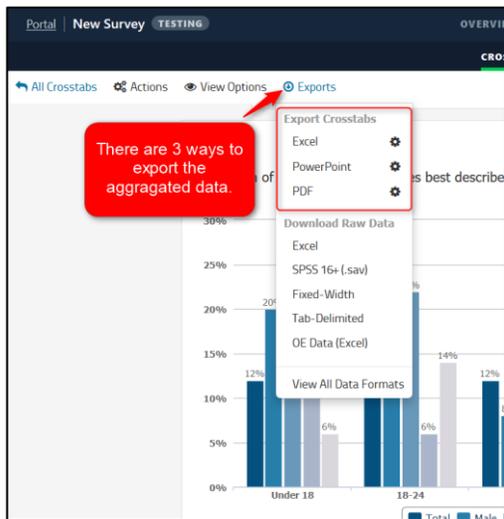
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Exporting Crosstabs

You can export your entire Crosstab report or individual tables. Easily export to Excel, PowerPoint, or PDF. PowerPoint exports are native with the ability to edit your tables and charts.

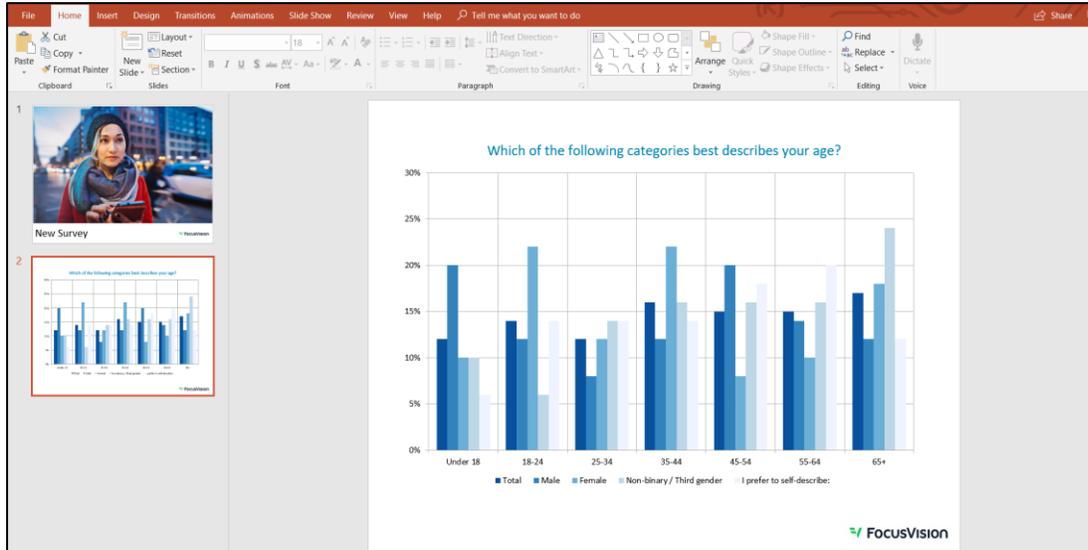
1. To export the aggregate data, click on “Exports” from the menu options. Choose Excel, PowerPoint, or PDF formats as your export.



2. To export a single table, click on the “Export” icon on the individual table. Choose Excel, PowerPoint, or PDF formats as your export.



Export Output Examples



PPT Export

The spreadsheet contains the following data for Q10: Are you...?

	Total (A)	Male (B)	Female (C)	Non-binary / Third gender (D)	I prefer to self-describe: (E)
Total	N=200	N=49	N=51	N=51	N=49
Male	25%	100%	0%	0%	0%
Female	26%	0%	100%	0%	0%
Non-binary / Third gender	26%	0%	0%	100%	0%
I prefer to self-describe:	25%	0%	0%	0%	100%

The spreadsheet also contains data for Q11: Which of the following categories best describes your age?

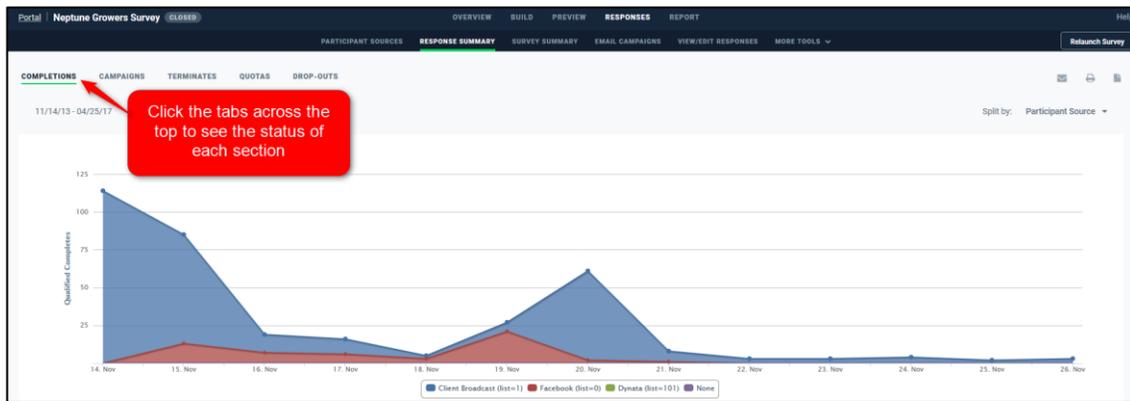
	Total (A)	Male (B)	Female (C)	Non-binary / Third gender (D)	I prefer to self-describe: (E)
Total	N=200	N=49	N=51	N=51	N=49
Under 18	12%	20%	10%	10%	6%
18-24	14%	12%	22%	6%	14%
25-34	12%	8%	12%	14%	14%
35-44	16%	12%	22%	16%	14%
45-54	16%	20%	8%	16%	18%
55-64	15%	14%	10%	16%	20%
65+	17%	12%	18%	24%	12%

Excel Export

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Response Summary

1. The Response Summary shows the progress of your survey. Tabs relevant to your study will appear across the top.



2. To access the Response Summary, click on “Responses” from the Portal.

Name	State	Accessed by Anyone	Build	Responses	Report	Actions
Shopping Experience Demo	DRAFT	—	✖	201	📊	⋮
Profile Survey	CLOSED	—	✖	0	📊	⋮
Neptune Growers Survey	CLOSED	—	✖	350	📊	⋮

3. You can also click on “Response Summary” under Responses Menu from within the project.

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Summary

For further assistance during your trial, there are two ways you can seek help:

1. Review the [Knowledge Base](#), which offers training videos and a searchable database.
2. E-mail the [Forsta Global Tech Sales](#) team if you need more one-on-one assistance.

We are committed to ensuring the Forsta Surveys tool meets your needs as you're going through this evaluation period.

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