MANUAL 1

PREPARATION FOR A WASH KAP MOBILE DEPLOYMENT

UNHCR
The UN Refugee Agency

cartong

Contents

STEP 1: PREREQUISITES FOR A WASH KAP MDC DEPLOYMENT 3
1.1. Security context 4
1.2. Human resources 4
1.3. Budget 4
1.4. Material 4
1.5. Pilot Test 5
1.6. Estimated time needed to complete the survey deployment 5
1.6.1. Logistics 6
1.6.2. Training 6
STEP 2- CHOOSING THE SMARTPHONES / TABLETS 7
2.1. Recommendations before purchase 7
2.2. Features 8
2.2.1. Essential features 8
2.2.2. Less essential features 8
2.2.3. Recommended accessories 9
STEP 3: ADAPTING THE FORM TO MY NEEDS 9
3.1. Make changes directly in Excel (in XLSForm) 10
3.2. Make changes via your online KoBo platform 10
3.3. Testing your modifications 12
STEP 4 | ORGANISING THE SURVEY 13
4.1. Using the online KoBo platform 13
4.1.1. Creating a UNHCR KoBo account 13
4.1.2. Accessing the online KoBo platform and managing your projects 14
4.1.3. Adding a new project 14
4.2. Installing ODK on the phones 15
4.3. Setting-up ODK Collect 18
4.3.1. Preparing the phones before the beginning of the survey 18
4.3.2. Setting-up the URL address 19
4.3.3. Download the survey on the phone 20
4.3.4. Test the data sending from the phones 21
4.4. Improving your ODK Collect settings to optimise your survey 21
4.4.1. Modify the form management settings 21
4.4.2. Modifying the user interface settings 23
4.4.3. Adding Admin settings 23
4.4.4. Copying the ODK parameters from one phone to another via QR code 24

STEP 1: Prerequisites for a WASH KAP MDC deployment

Undertaking a standardised mobile data collection on Knowledge, Attitudes and Practices related to Water, Hygiene and Sanitation (WASH KAP) has great advantages in terms of data quality, rapidity of data collection and decrease of costs over time — but for the mobile data collection to work there are certain prerequisites. Please read this section of the document, especially if it is the first time that you implement a mobile data collection; this will allow you to ensure that a deployment of an MDC is possible in your context.

If this is your first WASH KAP deployment, you can also read the main WASH KAP manual for non-mobile related subjects.

Mobile Data Collection for surveys is not necessarily worthwhile financially in the case of a small survey, but it can rapidly become a very interesting investment if you either plan one big survey or many small surveys on a regular basis (without mentioning the radical increase in data quality if your survey is well-designed).

This list summarizes the mandatory and optional prerequisites to a successful deployment:

	Mandatory	Optional
Security context	☐ Possibility to walk around safely with smartphones	
Human resources	Check the availability of: ☐ Survey managers and (depending on the size of the survey) supervisors ☐ Enumerators	☐ Female enumerators if you have gender-sensitive questions, i.e., about menstrual hygiene
Budget	☐ Buying the phones ☐ Training is a bit longer to get familiar with the phones	Pilot survey necessary if one of these scenarios apply: ☐ The organisation lacks experience on MDC or WASH KAP ☐ Some enumerators lack experience on MDC or WASH KAP
Equipment and supplies	☐ One phone per enumerator ☐ One computer ☐ A regular internet access through Wi-Fi or SIM cards	Depending on the context ☐ Spare batteries ☐ Protection cases ☐ Neck straps

1.1. Security context

- Walking around with a smartphone inside the camp must not put enumerators at risk (of theft or aggression), or make respondents feel uncomfortable.

1.2. Human resources

- It is important to have a tech-savvy survey manager so that setting-up technical mobile data collection procedures and managing the survey deployment are done adequately.
- If you only need maximum 6-7 enumerators to conduct your survey, then a single survey manager is enough to ensure team coordination. If you need more staff (because of a very large survey or a tight deadline), then you should consider hiring supervisors that will be an extra link between the enumerators and the survey manager.
- It is recommended to have enumerators who are already experienced and do not feel apprehensive about using a new technology. If this is not the case, you will need to plan extra time for training.
- If you want to include optional questions on women hygiene in the questionnaire, it is necessary to have female enumerators due to the personal and gender-sensitive nature of the questions.

Good Practice: We recommend planning for one supervisor per team of 6-7 surveyors.

1.3. Budget

- The budget for training and deploying survey managers and enumerators in the field will be similar to surveys using paper questionnaire. A small extra cost will need to be taken into account for the enumerators' training.

  If you want to carry out a more detailed cost assessment and estimate the time needed for preparation, training and data collection, please refer to section 2.7 below — Duration

- You will need as many phones as you have teams (adequate smartphones will cost between 100 and 250€) as well as one or two extras ones for the whole camp in case of technical problems.

1.4. Material

- You will need to have as many phones as there are teams. For WASH KAP surveys, unless security is an issue, enumerators can work alone (one smartphone per enumerators).
- The survey coordinator needs to have access to a computer to review the data and analyses.

- An internet access to synchronise data from the phones is needed at least once every two days.

> Refer to the **UNHCR SENS documentation** to know more about fully offline solutions that can be used with ODK Collect: http://sens.unhcr.org/mobile-technology/tools/ in case this is absolutely mandatory in your contexts.

1.5. Pilot Test

A pilot consists of a day/half day of data collection in actual field conditions. However, the data from the pilot must not be used in your actual survey. It is only meant to assess how operational your team is, and if any modifications to the questions/possible answers are needed.

A pilot survey is a chance to spot any remaining mistakes, misunderstandings or knowledge/training gaps before actually starting data collection. For example, it is better to realise before the deployment that not all enumerators have understood a given question in the same manner and that you are therefore gathering different answers to that question whereas they should in fact be similar.

When enumerators do not have much experience on this type of survey, a pilot test is an opportunity to become familiar with both the process and tasks to be performed. Interviewing families and asking questions that are sometimes of a very personal nature may be intimidating at first.

Furthermore, some forms' questions or answers might be inappropriate or not applicable to a specific context, and it is better to realise this during the pilot with the enumerators' feedback than at the beginning of the deployment.

A pilot survey is NECESSARY in each of the following situations:

- It is the first time that mobile data collection (MDC) is used within the organisation (or the first time for some enumerators/supervisors)
- It is the first time that the organisation is undertaking a WASH KAP (or the first time for some enumerators/supervisors)

Generally, when the organisation and the staff are comfortable with MDC, household surveys and the WASH KAP form, it is reasonable to start without a pilot survey.

> If a pilot surveys needs to be conducted, **please refer to Manual 2 - Training your teams**

1.6. Estimated time needed to complete the survey deployment

Compared to paper-based surveys, a mobile data collection requires a little more time in terms of planning to ensure that everything goes smoothly. (Adapting the form to local context, setting up the form and testing it in the field, training the team…) — however, the data entry and analysis time is drastically reduced.

1.6.1. Logistics

You may need between 1 and 3 days to arrange for the training and for the survey's logistics:

- Obtain the phones you will use during the training and the survey if you do not already have them
- Adapt the generic KAP form to the local context;

> If you are using mobile data collection for the first time and need to make changes to your form, you should allow one extra day to the training on how to modify the form. These modifications can, to some extent, be done and tested during the training and on the pilot survey site.

- Set up the phones and survey system

For more information, **please refer to Manual 3 – Deploy your WASH KAP mobile survey**

- Recruit enumerators
- Manage the training logistics: plan the enumerators and/or trainer's transportation to the training venue as well as an adequate training room with access to a projector and a Wi-Fi connection
- Get familiar with the training materials and the use of ODK before giving the training (Unless the trainer is experienced)
- Define the sampling strategy: this will not take more time than for a paper survey but remember to plan this step long before the deployment.

Refer to the WASH KAP manual for further information.

1.6.2. Training

You must have access to the phones during the training: otherwise it will not be possible for enumerators to become familiar with them before going to the field.

The enumerators' training will take 1 to 2 days. How much time exactly will be needed depends on a few factors:

- The prior knowledge your team has on:
  - Conducting household surveys in general (they should then be familiar with sampling & interview techniques)
  - The use of smartphones in general (if they own one for example)
  - The use of the ODK Collect application
  - The level of familiarity with WASH KAP surveys' terminology and concepts.
- The level of complexity of the WASH KAP to be carried out: if you only need core questions, fewer explanations on the survey contents will be needed. Each optional question added will require extra training time.

- Your survey team's general level of skills and qualifications (i.e., if they are fast learners or not).

"Manual 2: Training your teams to the WASH KAP mobile survey" will guide you for training surveyors and survey managers

Remember that the pilot survey day (and the related debrief) is your last opportunity to make sure that everything will go well throughout your deployment, and that your data will be of good quality.

STEP 2- Choosing the smartphones / tablets

This document does not aim at giving specific suggestions in terms of hardware (smartphones or tablets). The brands and models change too quickly and not every brand/model is available locally for all operations. It will, however, guide the supervisor in asking him/herself the right questions and making an appropriate choice among the different types of hardware in terms of effectiveness.

2.1. Recommendations before purchase

A purchase for what kind(s) of use?

An important question to ask yourself is “What will we be using these phones for?”. This does not only refer to the current exercise (the WASH KAP Survey), but other possible uses your organisation will have for them (i.e., other surveys, barcode scanning, use of GPS, camera, etc.). You should try to cover these needs if feasible, to avoid buying another entirely new set of phones in the coming months because the current ones did not fit these needs.
However, be realistic in that perspective: it is easy to get carried away by ideas that are unlikely to materialise.

Test the model when possible

Nowadays, more and more people own smartphones. If anyone within the organisation owns an Android smartphone, then it may be possible to try out this phone's necessary functionalities before buying a whole set to check if that model meets the requirements and is an adequate candidate for purchase.

Buy a set of the same devices

Try whenever possible to buy a set of the same model of phones — this will facilitate your deployment in terms of harmonising standard operational procedures, trainings and troubleshooting modalities.

2.2. Features

2.2.1. Essential features

Many features are on the market for cell phones, however not all of them will be important for mobile surveys. Knowing which functions will actually matter for data collection allows to maintain a purchase cost at a reasonable level.

Android phone

The phone must be an Android phone (not an I-phone/I-pad/Blackberry…), otherwise the Open Data Kit mobile application will not work on it.

A relatively recent Android version

Although it is not necessary to have a very recent version of Android to run the application, it can become more complicated with older versions. However, any newly purchased phone will normally feature a recent enough Android version (4 or above).

GPS

Most phones have a pre-installed GPS functionality. This is important if you plan to use GPS coordinates as part of your data collection. If you are not planning to use GPS functions, it may be the case for another survey exercise.
It is important to check that the GPS works without internet connection; it is a frequent problem.

An adequate screen size

For mobile data collection, a large screen can be an asset, but it is not essential. A small screen size (i.e., 320 by 480 pixels) will be enough, but it will display only one question per screen. Many users will find difficult to type text because a smaller screen size means a smaller virtual keyboard. This should not be a major hindrance if your data is well-suited for choice lists and do not require typing much text (the WASH KAP Survey is almost exclusively made of single or multiple-choice questions), but it may be a problem for other type of surveys.

ODK Collect also works on tablets, which can be an option. However, they are more expensive, bigger to carry and more prone to accidents (cracks in the screen, dropping, etc).

As a reference, a screen size of around 480x800 pixels can be a good compromise.

Battery life

This is difficult to evaluate because it depends on many factors (type of use, screen size, battery capacity, etc). It is sometimes possible to find more information on this online when searching for a specific phone. The longer the battery life, the better it will be for the organisation *(see section "Battery packs" below).*

Robustness

Make sure you choose a model that is not too fragile, as usually survey ground conditions can be quite hard on the phones!

2.2.2. Less essential features

Some functionalities are featured only to sell smartphones but are of little relevance for most MDC uses.

CPU power

The application used is actually quite efficient and does not require a powerful smartphone: some 5 years + phones are still used in the field today.

Memory

There is no need to pay extra for a phone that has a large built-in memory. Unless there is a special need for a large number of pictures, ODK Collect does not require much space. If more storage space is needed, SD cards can be used.

Camera/video functionalities

As most phones come pre-equipped with a camera and have video capacities, it is not necessary to pay more for special features on this matter, unless image quality is of particular importance. For instance, it can be the case to scan barcodes.

2.2.3. Recommended accessories

Battery packs

Battery packs (powerbanks) can be very useful in contexts where energy sources are rare; it prevents enumerators from being blocked for such reasons in their daily work.

Protection case and neck strap

These accessories help to protect the phone from falling and other sources of damage. The neck strap is also a practical way for the enumerator to carry the phone.

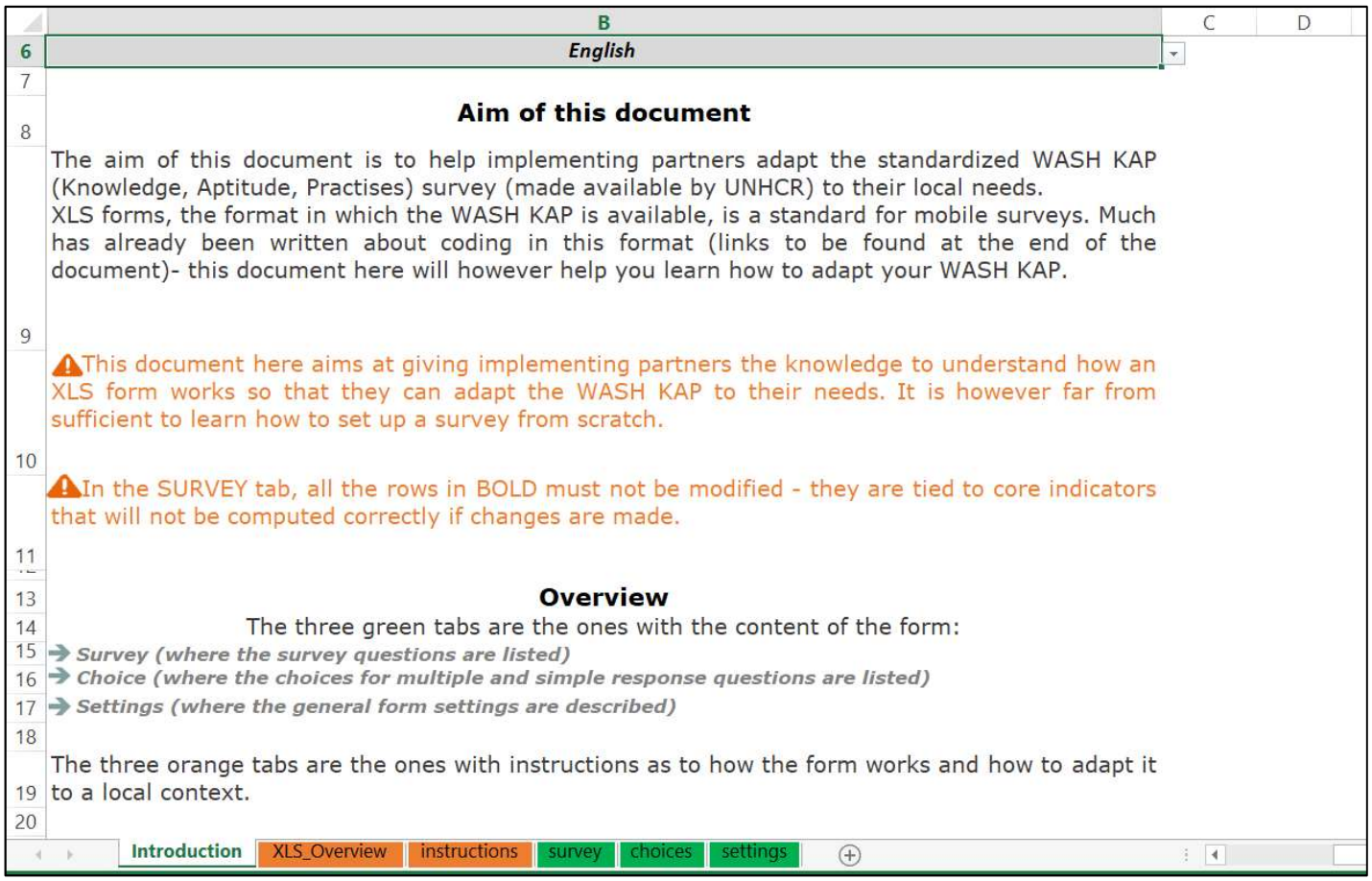
For more detail you can refer to the **last comparison of Android phones made by CartONG** at this URL: http://blog.cartong.org.

STEP 3: Adapting the form to my needs

The standardised WASH KAP form should be adapted to the local context and specific needs. There are two possible ways to operate these changes:

- Directly in Excel in XLSForm, a well-recognised format of survey design

➢ Making changes via the online KoBo platform



English

Aim of this document

The aim of this document is to help implementing partners adapt the standardized WASH KAP (Knowledge, Aptitude, Practises) survey (made available by UNHCR) to their local needs.
XLS forms, the format in which the WASH KAP is available, is a standard for mobile surveys. Much has already been written about coding in this format (links to be found at the end of the document)- this document here will however help you learn how to adapt your WASH KAP.

⚠This document here aims at giving implementing partners the knowledge to understand how an XLS form works so that they can adapt the WASH KAP to their needs. It is however far from sufficient to learn how to set up a survey from scratch.

⚠In the SURVEY tab, all the rows in BOLD must not be modified - they are tied to core indicators that will not be computed correctly if changes are made.

Overview

The three green tabs are the ones with the content of the form:

- ***Survey (where the survey questions are listed)***
- ***Choice (where the choices for multiple and simple response questions are listed)***
- ***Settings (where the general form settings are described)***

The three orange tabs are the ones with instructions as to how the form works and how to adapt it to a local context.

Introduction | XLS_Overview | instructions | survey | choices | settings

3.1. Make changes directly in Excel (in XLSForm)

Detailed instructions are available in the standardised form itself (WASH_KAP_mobile_template.xls) to allow the adaptation of existing questions (i.e., optimise some value lists by deleting options that are not relevant in a given context), make visible optional questions hidden by default, or add a question for example.

These adaptations require a minimum training if you are not used to this format, better consider having it done by someone familiar with XLSForm to avoid bad surprises (contact the UNHCR WASH team if you need support).

A specific formatting is available to facilitate adaptation.

Pay special note to the fact that it is essential to not manipulate any question allowing for the calculation of key indicators (the questions in bold) at the risk of obtaining wrong results.

Once these changes are made, you just need to import the adapted form into the online KoBo platform.

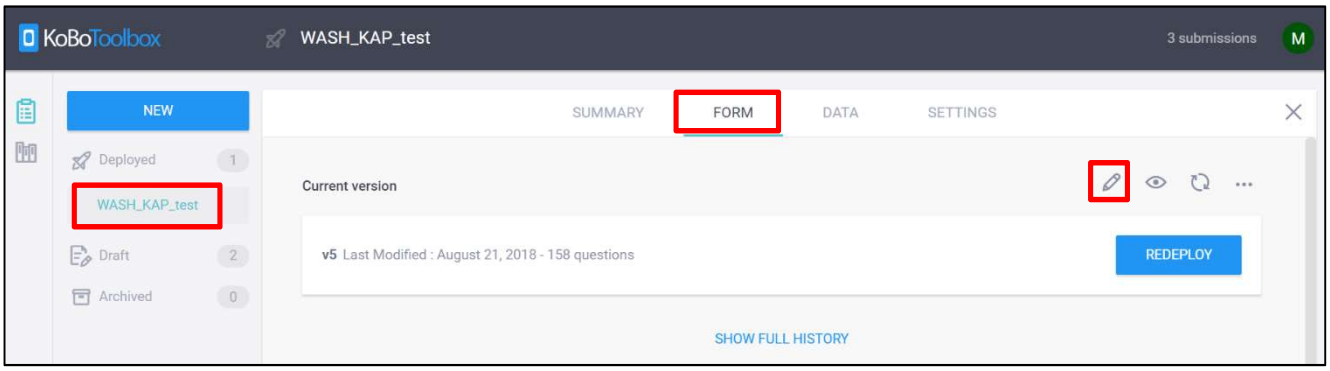
3.2. Make changes via your online KoBo platform

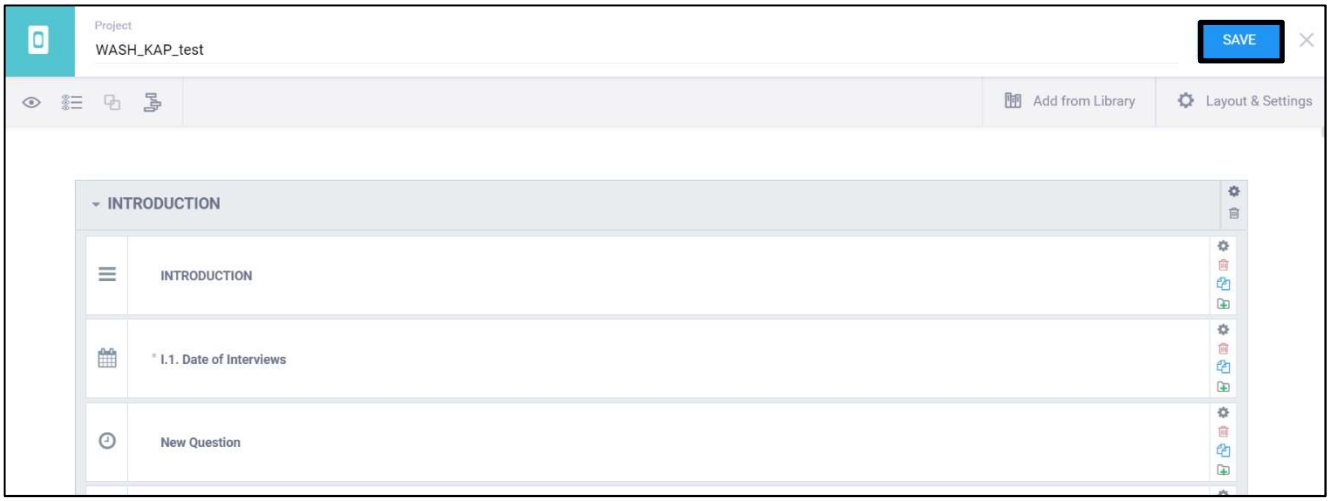
If you are not comfortable with XLS form, you can also make the necessary adaptations for the local context on the online KoBo platform directly. To do so, go to kobo.unhcr.org (UNHCR Kobo Platform). You can then import the

"WASH_KAP_mobile_template.xls" file on the platform by clicking on "New", "Upload an XLSForm" and then select the given file.

> When following this process, it is important to make only minimum changes given that the modification instructions cannot be as visible in the tool as in they would be in the XLS form itself (ie not modifying a question that helps calculate the core indicators etc).

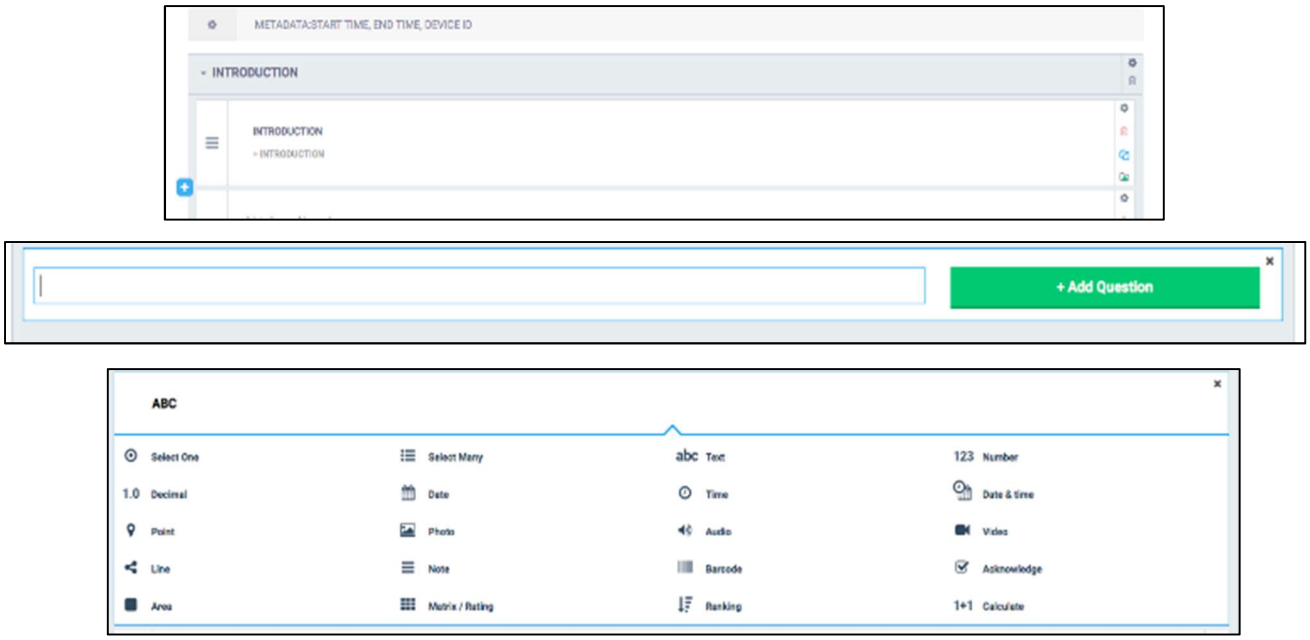
Then, go to the "Form" tab and click on "Modify"





How to modify a question:

If you want to modify the text of a question or of answers to a given question, you can simply click on it and change the text directly.



If you want to change the constraint of a question, change its display settings, appearance, etc., you can click on the "Settings" icon that will allow you to make the desired adaptations.

How to add a question

If you want to add a question to the standardised WASH KAP form, you can click on the "+" icon under the question below which you want to add the new one. KoBo will ask you to write the exact prompt, then to select the type of the new question you want to add.

3.3. Testing your modifications

You just have to save then deploy or re-deploy your project so you can test it.

Make sure you test your survey extensively after setting it up to avoid any bad surprises that the validation tool may not have seen (be it logical or technical)! To do so, test all the changes you made on the mobile phone and web form entry; save the test-submissions then view the data in the analysis tool to verify that the whole chain of data collection to analysis functions.

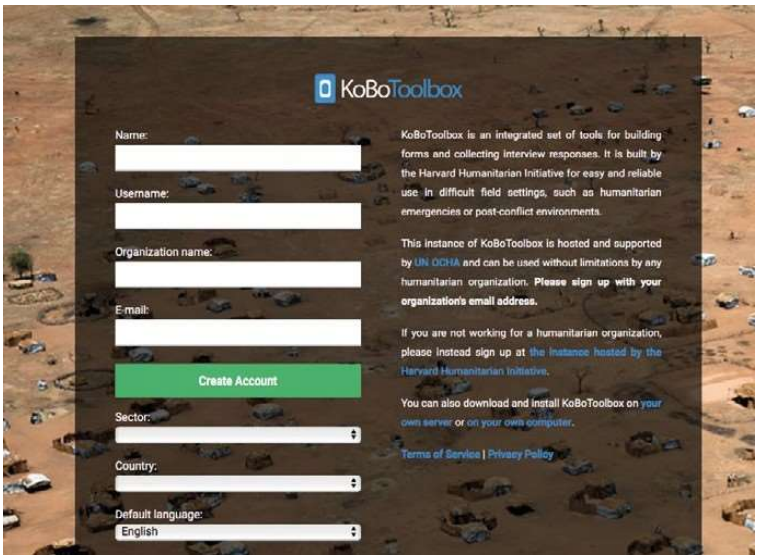
STEP 4 | Organising the survey

4.1. Using the online KoBo platform

KoBo is the survey management tool that we recommend as a free and easy to use tool and is compatible with the analysis tools. We moreover strongly recommend using the online UNHCR KoBo platform (https://kobo.unhcr.org) rather than OCHA's (http://kobo.humanitarianresponse.info)

to ensure that all WASH KAP surveys are carried out on the same server in such a way that data can be shared more easily from one user account to another if it is necessary. You will also be able to ask for support from the UNHCR KoBo team if you have issues with the website.

To access the UNHCR KoBo website go to: https://kobo.unhcr.org.



You will have to start by creating an account (you cannot use the same username as the OCHA platform if you have created an account on that platform already).

4.1.1. Creating a UNHCR KoBo account

If you do not have any account on the UNHCR KoBo website you can create one; to do so, follow the steps below:

- Go to “Create an account”
- Fill in form with the necessary information and then check your emails to get the validation email.
- Once you received the email, click to activate the account — you can now access the Kobo website!

Remember to define a marking username (i.e., «wash_country_organisation_role_region») to facilitate data sharing at a later stage.

The validation email can take a few minutes (check your spam folder if you cannot find it in your inbox).

4.1.2. Accessing the online KoBo platform and managing your projects

By default, you will be directed to the Homepage.

Your projects (when you have some) are organised into three categories:

- Deployed
- Drafts (projects that have not been deployed yet, still at the design stage)
- Archived (finished projects)

➢

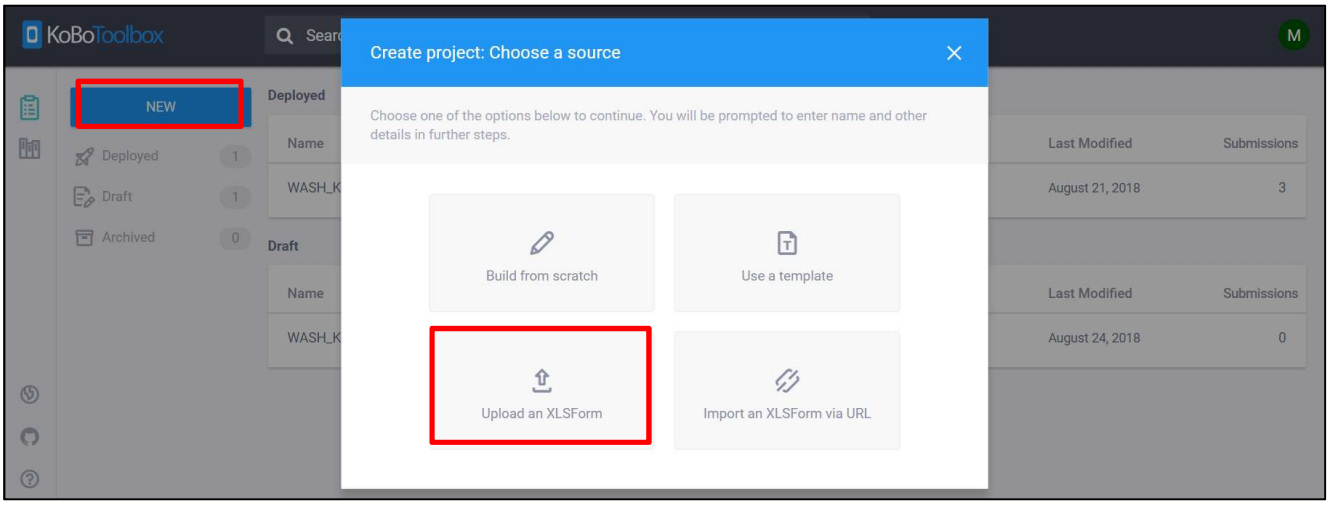
4.1.3. Adding a new project

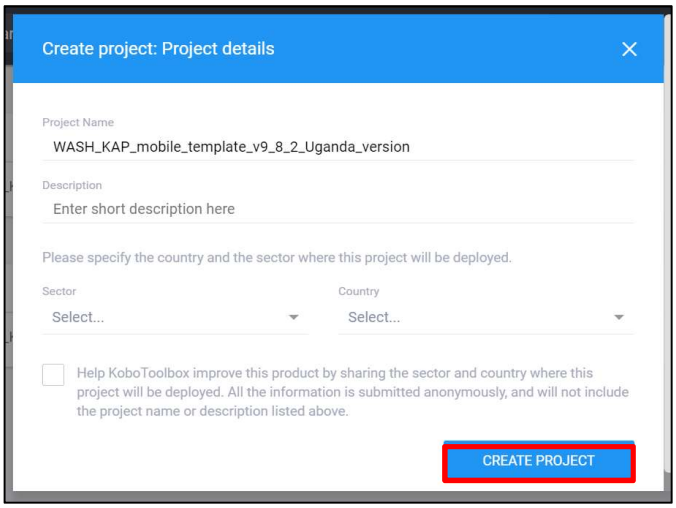
The standard WASH KAP form is in Excel, in what we call XLSForm format.

To import the contextualised WASH KAP form (XLSForm file):

1- Click on "New»; this will open a "Create Project" window. Then, click on "Upload an XLSForm»; select the XLSForm you will need for your survey.

2- Then click on "Create project"

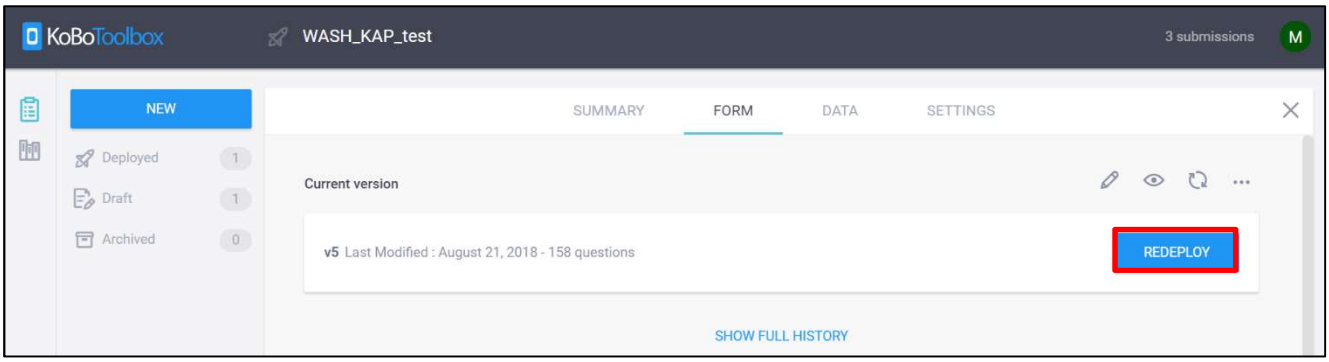




Once the Import is over, your form will appear on the home screen: it means that the import has been successful.

If nothing appears on the screen, it means that the download has failed. An error message will appear shortly, helping you to understand what went wrong. Most of the time, it will be because you have made a change that is not allowed in the XLS form.
Ask your HQ WASH focal point if it is the case.

3- You can now click on "Deploy" to view the form from your mobile.



4- If you do not want to deploy your form now, it will be saved automatically in your drafts

4.2. Installing ODK on the phones

ODK Collect is the mobile phone application that will host your survey, record and save the data, and allow you to send it **to your online KoBo account**.

Option 1 – Installing ODK with Google Play (easier)

For this first option to work, you need a Google Play account and internet access. The Google Play account is free. This is the simplest option.

If you decide to use this option, you will need to create a Google Play account that is separate from your personal account. Indeed, it is better to keep your personal data and information away from work phones: if you use a personal account, your personal data may remain available on these phones.

Open the Google Play application:

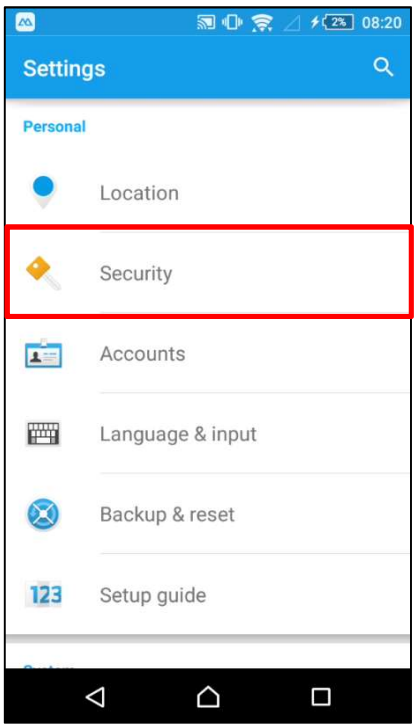
- In the search bar, type " odk collect " and select this one:
- Follow the instructions for installation.

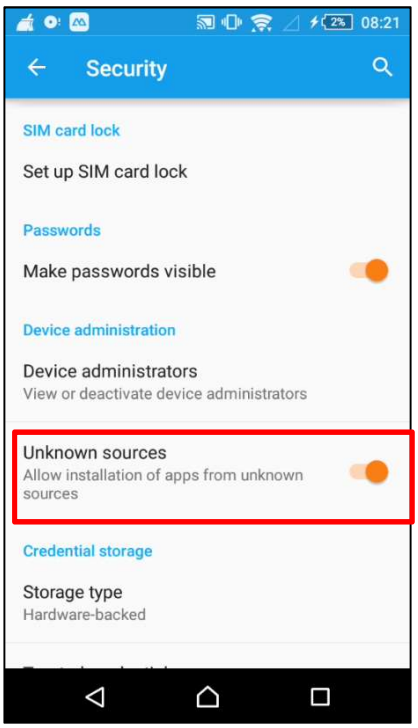
Option 2 – Installation with a USB

This second option works when you do not want to use a Google account or have a very poor internet connection on your phone.

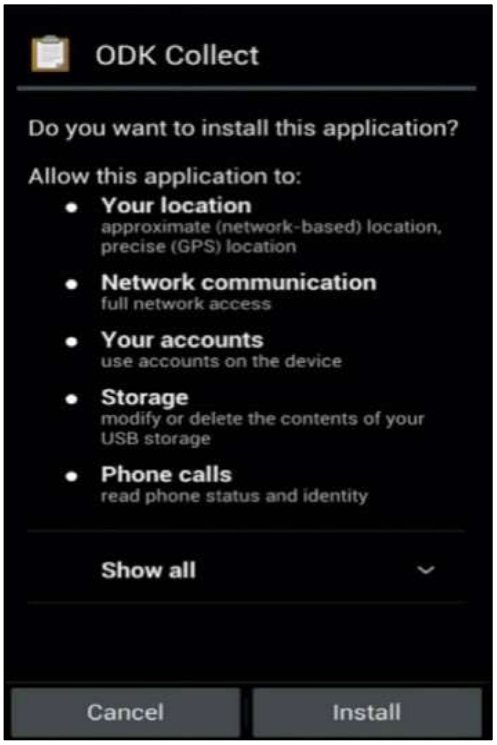
1. Retrieve the **.apk** file (the manual installation file) from the opendatakit website: https://opendatakit.org/software/ (remember to retrieve the latest version)
2. Save the downloaded .apk file in a relevant folder.

- On the phone, you must first allow « Unknown Sources".
  1. Go to "Settings»; then, under "Security" (may vary depending on the model of your phone — if it is not at the location mentioned, look for it in similar menus)
  2. Scroll the screen down until you find a box for "Unknown Source".
  3. Make sure it is ticked.





4. Then, on the phone, you must navigate to the folder where you have placed the .apk file, tap on it to start the installation process:



➢ Do not hesitate to put the ODK icon on your phone's desktop: it will make it more easily accessible for you and your enumerators.

4.3. Setting-up ODK Collect

Some settings are mandatory while others are optional and concern preferences that can be adjusted to better suit the operational context (however, the application will still works regardless of these potential changes).

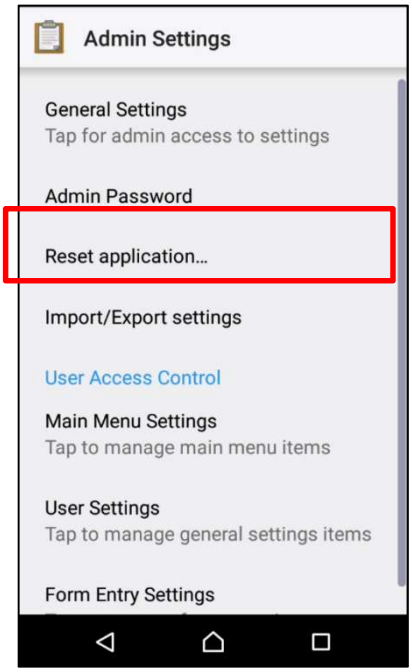
4.3.1. Preparing the phones before the beginning of the survey

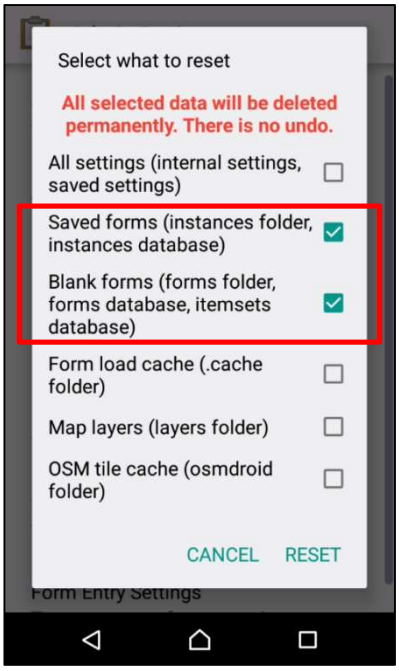
Delete the forms saved in each phone before the survey deployment.
This quick manipulation will to avoid confusion amongst the enumerators (them selecting the wrong questionnaire by mistake during the survey for example).

> ☐ At the time of deployment, only the forms that are useful for the ongoing survey should remain in the phone.

To delete saved forms, we recommend:

1- Open ODK Collect, then tap the “Menu” button and choose “Admin Settings”.
2- Click on "Reset application "
3- Select "Saved Forms" and "Blank Forms"; then, click on "Reset"
4- Repeat this operation on each phone.

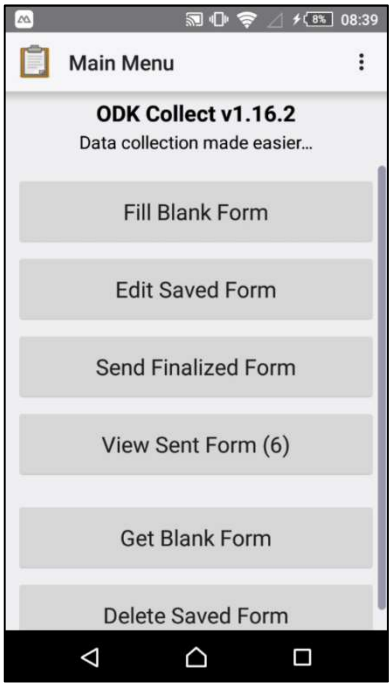


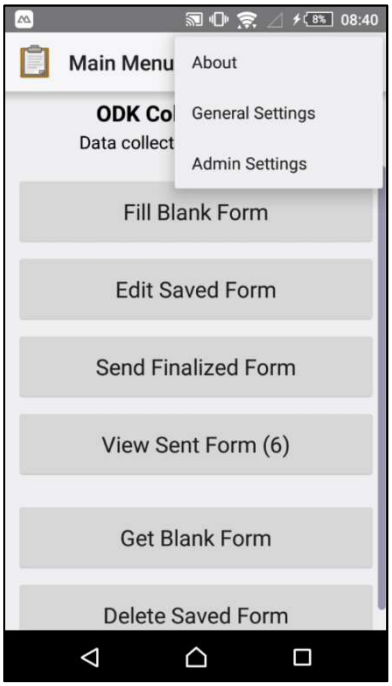


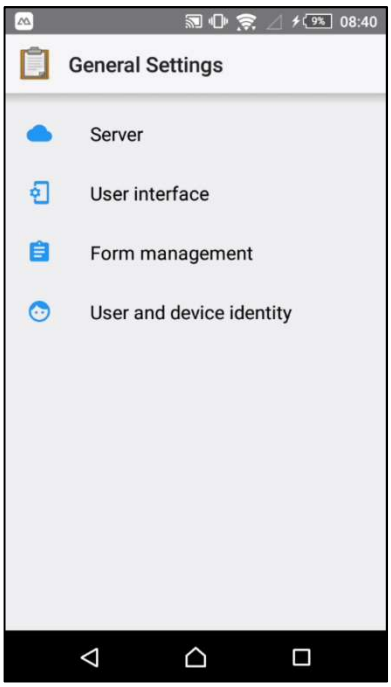
4.3.2. Setting-up the URL address

You need to tell ODK Collect where to retrieve the forms you wish to use and where to send the survey records you have completed.

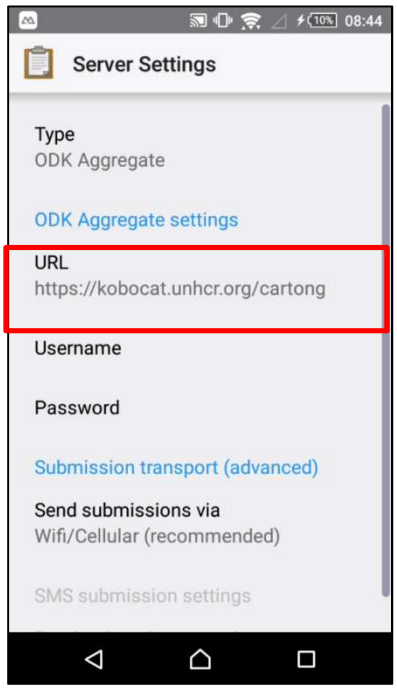
- Open ODK Collect, tap the “Menu” button and choose “General Settings”; then, click on “Server”.







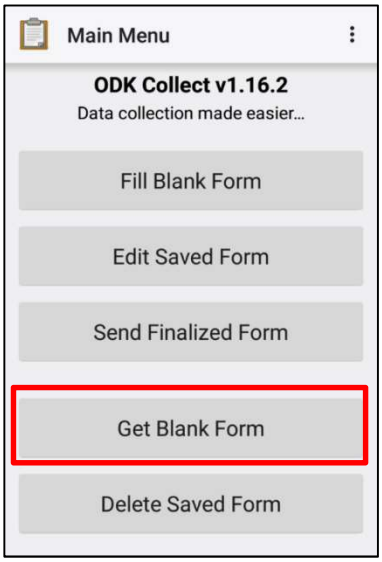
- You must then specify the address of your Kobo website: http://KoBocat.unhcr.org/accountname.
  - Replace "**accountname**" by your username (the one you used to create your KoBo account)
  - We recommend you provide a username and password to secure your data.



For more detail, refer to the section "**Securing your data**" at the end of this Manual.

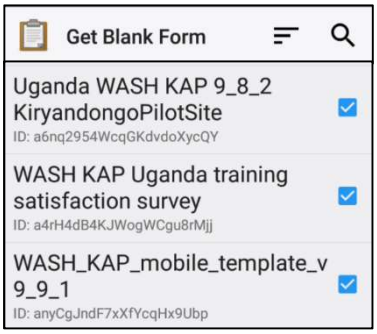
4.3.3. Download the survey on the phone

Once ODK Collect "knows" where to find the forms and send the data, you must add the form(s) you will use on the phone.

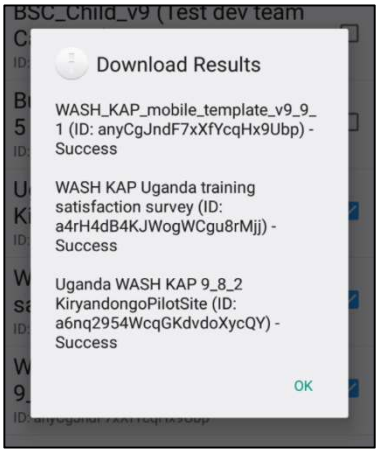


To do this:

- Ensure that the phone is connected to the internet
- From ODK Collect's main menu, choose "Get Blank Form"
- After a moment, a list of forms available on your KoBo account will appear.



- Simply tick the one that you need, and then click on "Get Selected"
- The download can take a few seconds depending on your internet connection.



- A "Success" message tells you the download was successful, listing all the forms you just downloaded:

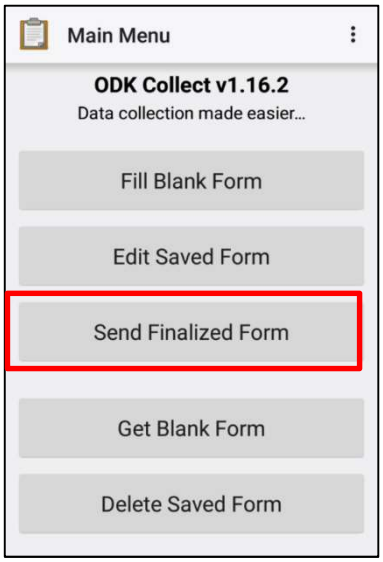
- If you get an error message when trying to visualise the list of forms (or else, you cannot view the list at all):
  - Check if you have entered the right URL. This is the most common problem.
  - Check that your phone is actually connected to the internet.
  - Make sure that you did add your form to your Kobo Account and actually deployed it. Non-deployed forms are considered as "Drafts" and are not available on your phone.
  - You can also "Refresh" the web page and retry to connect.

4.3.4. Test the data sending from the phones

Make sure to fill records during the preparation by testing the changes you made - then:

Click on "Send Finalized Form " on the main screen.

The questionnaires you filled can be selected and sent to your KoBo account from where you will be able to view or download them for use in the associated analysis tools.

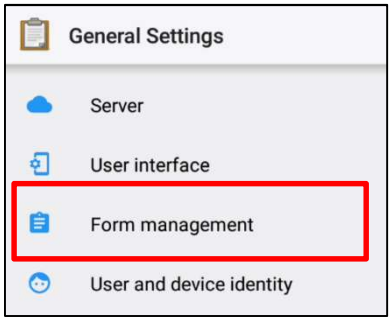


4.4. Improving your ODK Collect settings to optimise your survey

This section is about choices you can make when configuring ODK Collect depending on how you prefer to manage the survey. You can simply keep the application's default values or fine-tune them according to your needs.

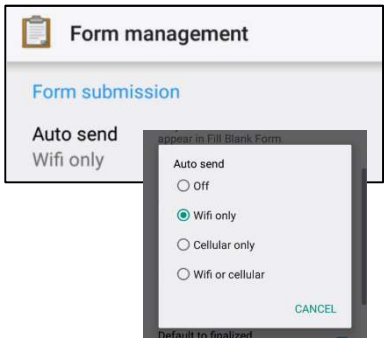
4.4.1. Modify the form management settings

Go to "General settings" and then to "Form management"



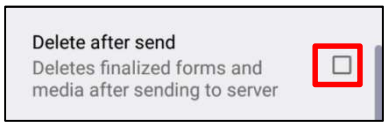
Auto-send via Wi-Fi or mobile data network

If this option is checked, then any form marked as “finalized” will automatically be sent to the server as soon an internet connection is available, without going through the “Send finalised form” functionality.

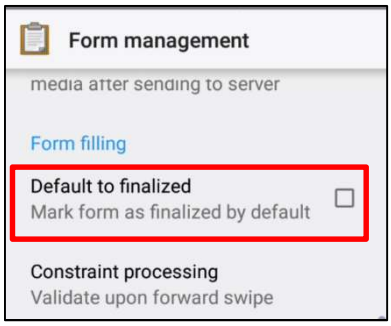


Delete after send

Although it is not recommended to use the phones as long-term storage devices, as long as the survey is ongoing it is reasonable to keep the forms there. They can be deleted once the data has been collected and proper back-ups established. In most cases the "Delete after send" option should not be checked.



Final version by default ("Default to Finalized")

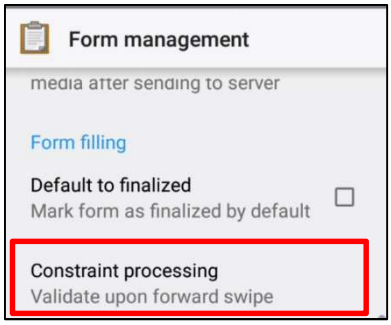


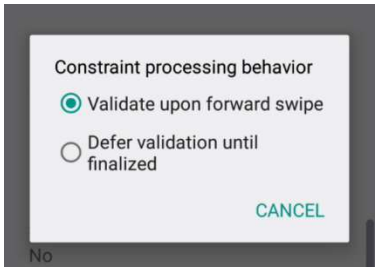
If the "Default to Finalized" option is checked, the record will be marked as finalised at the end of the interview.

If the “Default to finalize” box is not checked, then either the enumerator will have to check it manually upon reaching the end, or the survey managers will take care of it after verifying the data when he wants to send them to the Kobo account.

It can be practical to NOT tick records as finalized by default. This makes it easier to keep track of which form has been reviewed and checked by the survey manager or a supervisor. Someone should review the work done before sending it to the website at least during the first days of the survey. This option can then be changed later if it is observed that data quality is acceptable and there is no need to systematically check each record every day.

Constraint processing behaviour





There are 2 ways to manage mandatory answers (the ones that cannot be skipped) or the restrictions that can be put on a given answer (for example, the date of interview cannot be posterior to the day it is conducted).

- First option: if you do not answer the mandatory prompt or do not respect a given constraint, ODK Collect will refuse to move to the next prompt. If this option sounds fine to you, check "Validate upon forward swipe"

- Second option: you can skip mandatory prompts and not respect constraints during the roll out of the survey; however, when finalising the record, ODK Collect will send you back to these prompts. If this option sounds fine to you, check “Defer validation until finalized” is selected.

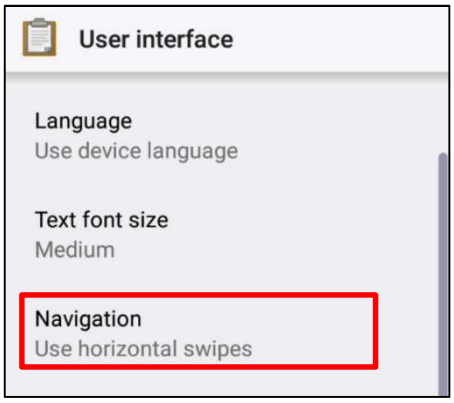
As a reminder, it is impossible to send a form to your KoBo account if it is not finalised.

For newer enumerators, it is strongly recommended to validate each prompt upon forward swipe. Constraints in the survey are in place to prevent the team from making mistakes. When the validation is done only at the end of the questionnaire, it leaves more room for them to make a lot of mistakes and creates a lot of confusion. The survey manager can indeed end up with a phone in which forms have many questions unanswered; the interview being conducted by someone else, it can be difficult to correct the mistakes or complete the form.

4.4.2. Modifying the user interface settings

Navigation

Go to "General settings" then to "User interface"

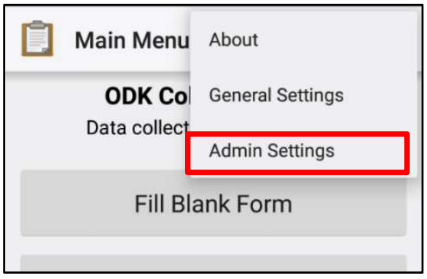


The “Navigation” option can be used to determine how to move from one prompt to the next one (from one screen to another). One can use horizontal swipes, forward/backward buttons at the bottom of the screen, or access both options.

On small screens, buttons take away a significant portion of the screen and therefore, using only swipes is recommended. It is also in this section that you can choose ODK's language (that is your phone's language by default) The questionnaire's language is auto-defined when filling a record.

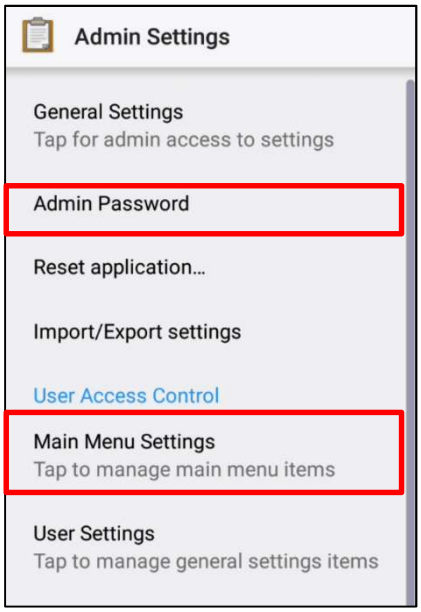
4.4.3. Adding Admin settings

Go to "Admin settings"



Setup Admin password

One can create a password to block any change within the user menu to prevent handling errors. This may be particularly useful for deployment to very remote locations, where distance support is the only option available for debugging when there is a concern that enumerators may play with settings they should not look into.

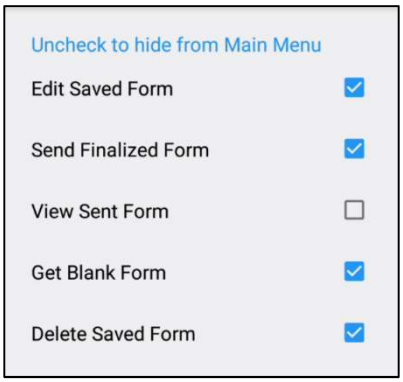


Hiding menus & options

The other admin settings allow you to hide some options from the main menu. This can be useful for example to prevent enumerators from deleting a form (or, even worse, the “blank” form) by mistake.

The “Delete saved form” command is probably to be the most useful one to hide.

Remember that if you hide “Send Finalized Forms”, the survey manager will need to un-hide the option each time s/he wants to send the data to the server send the data and then re-hide it, which can be time-consuming if one has numerous phones to deal with —therefore, to be used depending on context.

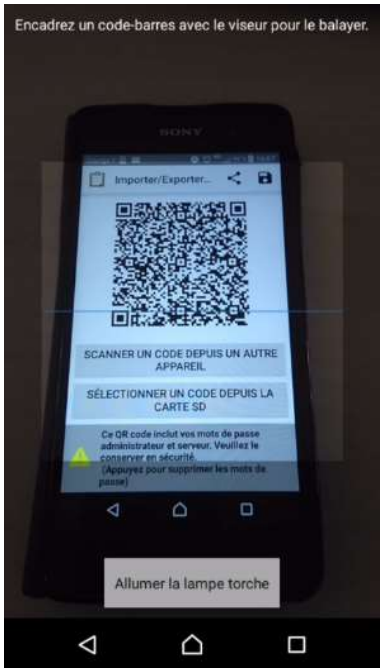


4.4.4. Copying the ODK parameters from one phone to another via QR code

If you need to configure general or admin settings on the whole set of survey phones (in preparation for the training, pilot survey or deployment), you can follow this method. This will avoid you being obliged to setup all phones one by one.

It is an easy and quick method that allows you to make sure ODK Collect is setup in exactly the same way on all your phones.

This option is available from the Collect v1.7.0 onwards



You can follow the procedure below:

1- As a first step you will need to choose a phone that will serve as a reference phone. Make all the settings you need (general and/or administrator) on this phone.

2- Once the reference phone is well set, go to "Admin settings" then "Import/Export settings"

3- A QR code appears with all the device's ODK settings.

4- Gather all the phones you have to configure, go to "Admin settings", and then "Import/Export settings"; choose the "Scan code from other device" option,

5- Scan the reference phone's QR code from each phone: their ODK settings will be updated automatically.

You will just need to download the form you need individually.

Be careful: the QR code contains all settings made on ODK Collect. This means that the server or admin's password(s) are accessible to anyone who has the QR code. See options below related to this question.

Securing your data

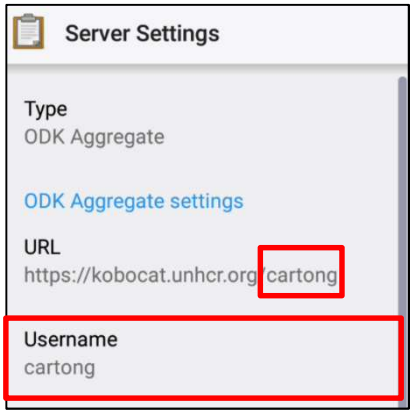
Two options are available to you to secure your data —the option's choice will depend on contextual needs.

Option 1 - Basic protection

An authentication is required to submit data and download forms. This is a first step towards securing your data given that this solution allows you to ensure that only the person whose phone has been correctly configured will be able to send records. The setup of this securing option is simple. The person in charge of setting up ODK on the phones will however need the account's identifiers.

On the phone:

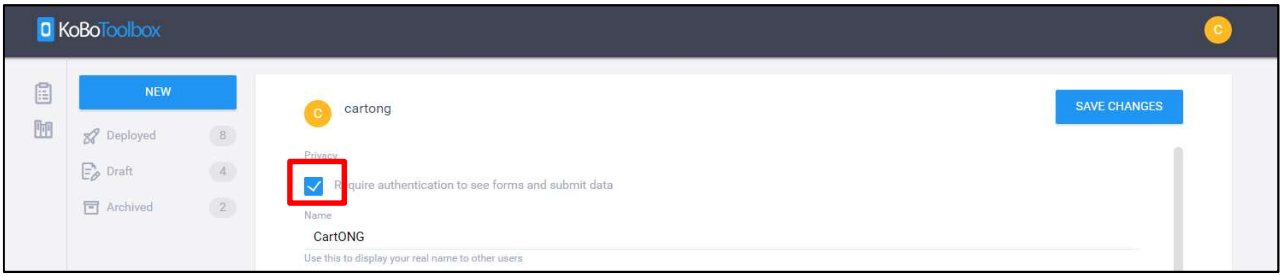
- Add the URL associated to the ***main*** KoBo account
- Add the username and password of this same ***main*** account — this step just needs to be done once on every phone, except if the user deletes this information at a later stage. Under "Admin settings", you can also add an admin password, and/or set a "control user access" option to the server to prevent the user from accessing this functionality.



On your online KoBo platform:

- In the account's settings, **check the** "Require authentication to view forms and submit data" **box**.

To keep your data protected, be careful not to share the password with the enumerators except if you exceptionally need to do so given that it is the same as your online KoBo account

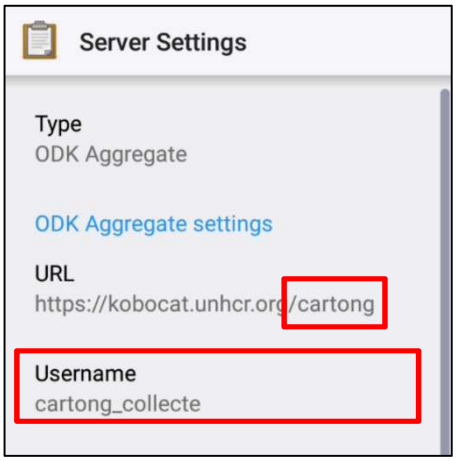


Option 2 - Advanced protection

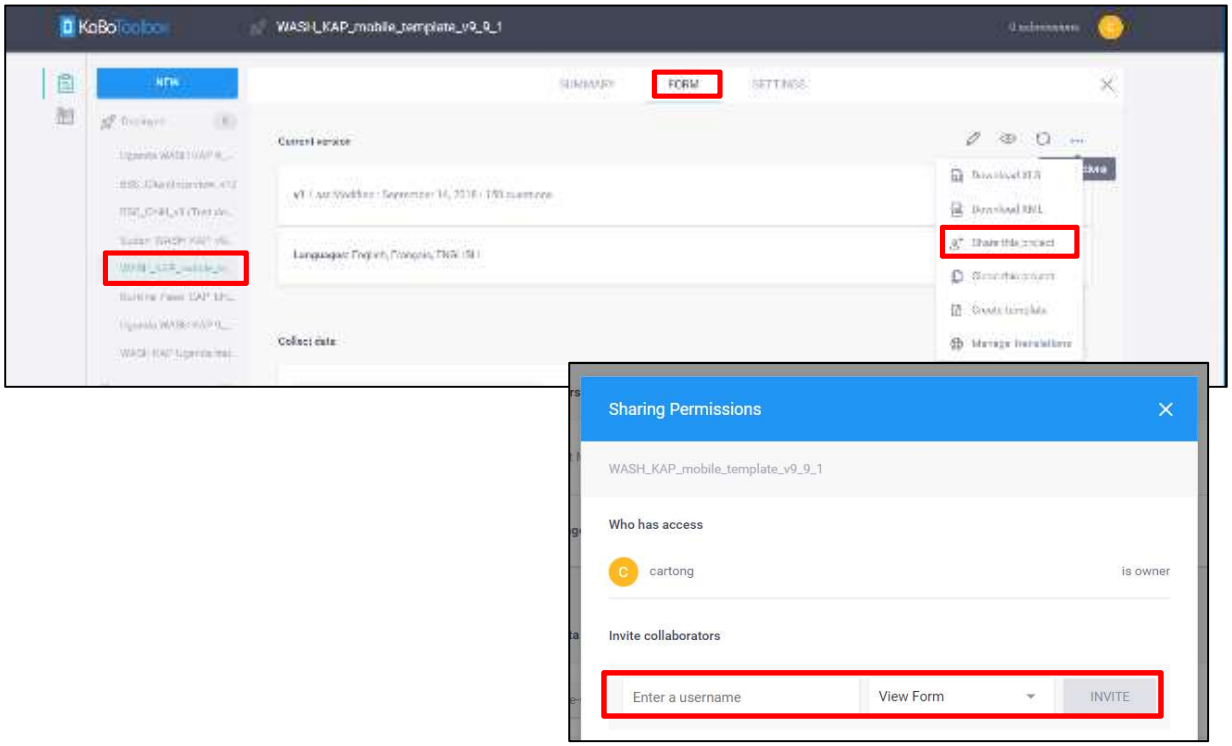
For this option you will need to create a second account that will serve only for records and be associated to each phone with its own ID and password.
You will also need to configure the project's settings on your online KoBo platform by authorising the secondary account(s) you created to submit their data.
This is the most secure option for your data because you do not provide your admin account's identifiers on all the phones. Only the persons to whom you will communicate the secondary account(s) identifiers and that you will have pre-authorised on your online KoBo platform will be able to submit data and download the form.

NB: there is no need to create one secondary account per phone — you can provide information about a single unique secondary account on as many phones as you wish!
This securing option's configuration is a bit more complex than the basic option.

- On the phone:
  - Specify the ***main*** account's URL
  - Add the ***secondary*** account's identifier and password



- On your online KoBo platform:
  - In the main account's settings, **check the** "Ask authentication to view forms and submit data" box.
  - From the main account's homepage, click on "Share"
  - Then, invite the user you want to authorise to submit the data.



wash.unhcr.org

© UNHCR, 2017
Credits to the Kobo team for providing a tool setup to work directly with the XLS forms format. The “Kobo Excel Data Analyzer” is also available directly from the Kobo account.
It has been embedded in this analysis tool to allow the use of a single tool for Excel analysis.