

## SURVEY MANAGERS - EXERCISES

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### I. Introduction

This set of exercises is intended to make you more comfortable with the ODK system. The exercises are optional and you may decide to do all of them, none of them or pick & choose the topics on which you need more experience.

When you fill a form, you don't have to spend much time on each question – you can just make up any answer. If we need a specific answer for a question, it will be clearly indicated in the exercise.

Note, however, that the exercises are progressive: if you start at exercise 3, it is expected you would be able to complete the previous 2 exercises. Also, the exercises don't provide detailed, steps-by-steps instructions: those are included in the support documentation. You can refer to it for more details.

You may want to use some of those exercises for the training of enumerators. Note that some of these aren't of practical use to them – for example they would not normally need to delete saved forms. This should be reserved for survey managers (or supervisors).

## II. Prerequisites

- You have already installed ODK on at least one phone and you have already added the survey as explained in the documentation. It doesn't matter if the survey isn't final yet and changes will have to be made – you can use the Global version that is included in the package.
- You have deleted everything else on ODK Collect. There are no saved forms and only one survey (the WASH KAP: **Tool\_1\_2\_PHS\_WASH** XLS file). While it won't prevent you from completing the exercises, it may make things more confusing if there are other surveys/saved forms on the phone.
- Please read the whole exercise before attempting it – they are meant to be done step by step, to showcase specific elements of the system. If you miss a step it may be confusing because the results you will obtain will be different from those expected.

## III. Exercises

### III.1. Exercise 1 – ODK- General use

#### III.1.A. What we'll see

This is an introductory exercise designed to practice general-purpose functionalities.

#### III.1.B. Exercise

1. Open ODK Collect, and go to the main menu.
2. Under "General Settings" go under "Constraint processing behavior" and ensure that "Validate upon forward swipe" is selected.
3. Start a new form. When you arrive at question "A2 – Did the household give its consent to be interviewed" try to skip to the next question, without giving any answer. Notice that ODK Collect will prevent you from doing so.
4. Then, exit the form by pressing return & selecting "Save Changes". This will bring you back to the main menu.

At this point, you have saved 1 survey.

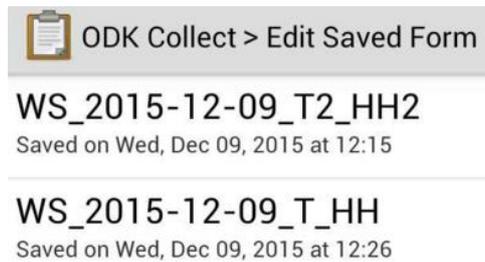
1. Under "General Settings" and then "Constraint processing behavior", ensure that "Defer validation until finalized" is selected.
2. Start a new form (Fill blank form). But this time, do NOT answer any of the questions, simply swipe to the next screen until you arrive at the end). Notice that nothing prevents you from going from one screen to the next one, even if you provide no answers.
3. At the very last screen, ensure that "Mark form as finalized" is NOT checked. Then choose "Save form and Exit".

WS\_2015-12-09\_T\_HH

Mark form as finalized

Save Form and Exit

At this point, you have saved 2 surveys. You can check by going to “Edit Saved Form”. It should be similar to this:



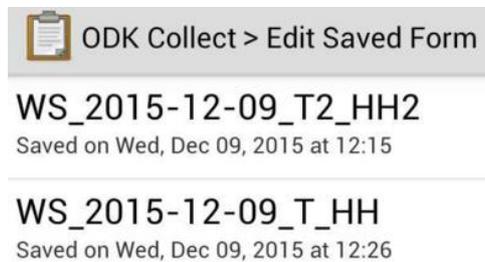
ODK Collect > Edit Saved Form

WS\_2015-12-09\_T2\_HH2  
Saved on Wed, Dec 09, 2015 at 12:15

---

WS\_2015-12-09\_T\_HH  
Saved on Wed, Dec 09, 2015 at 12:26

1. You can now start a 3<sup>rd</sup> form. When you arrive at “A2 – Did the household give its consent to be interviewed”, press return, but this time select “IGNORE CHANGES”.
2. If you go back to “Edit Saved Forms”, you will see that the form you had started the 3<sup>rd</sup> time isn’t available:



ODK Collect > Edit Saved Form

WS\_2015-12-09\_T2\_HH2  
Saved on Wed, Dec 09, 2015 at 12:15

---

WS\_2015-12-09\_T\_HH  
Saved on Wed, Dec 09, 2015 at 12:26

1. You can also notice that the forms you have saved display the time at which it was last saved.
2. Select the 2<sup>nd</sup> form you have saved, the one where you just skipped all the questions.
3. At the bottom right, you will find a button, “Go To End”. Select this option.
4. This will bring you to the last screen. This time, ensure that you check “Mark Form as Finalized”, then “Save Form and Exit”.

WS\_2015-12-09\_T\_HH

Mark form as finalized

Save Form and Exit

Notice that it will not let you – it will bring you back to the first question that you skipped (it should be the choice of the camp). This is because you have enabled the validation to take place only when the form is marked as finalized.

Tick the camp in which you conduct this survey

AAA

BBB

CCC

Sorry, this response is required!

You can now press return, choose to ignore the changes. This concludes exercise 1.

### III.2. Exercise 2 – ODK- Saved, finalized, sent forms

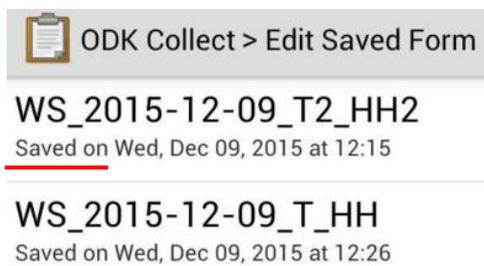
#### III.2.A. What we'll see

In exercise 2 we'll check the exact meaning of a saved, finalized and a sent form.

💡 At question A2 (about the consent), if you answer "No" or "Absent" it will greatly shorten the survey – thus allow you to complete the exercise faster.

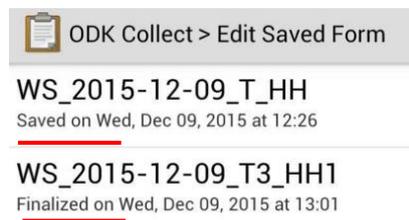
#### III.2.B. Prerequisite

- Two saved, but not finalized, forms on the phone.
  - If you have completed Exercise 1, you already have 2 saved (but not finalized) forms on your phone. You can start.
  - If you have not completed Exercise 1, then please fill 2 forms (but don't finalize them).

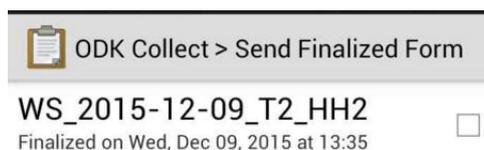


#### III.2.C. Exercise

1. Go to "Send Finalized form". It should be empty, because the 2 forms you have filled so far were only saved, not finalized.
2. Open one of the 2 forms. Make sure all mandatory questions have an answer. When you arrive at the end, mark it as finalized (remember, if you say No or Absent to question A2, it will be much faster).
3. Go to "Edit Saved Form". It should be similar to this. Notice the difference between one being "Saved on..." and the other one "Finalized on...":

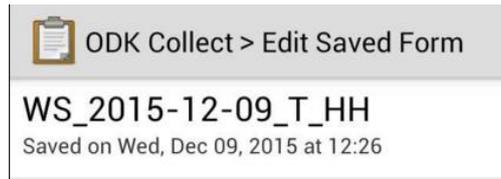


4. Go to "Send Finalized Form". There will be only one form, the one you have finalized:

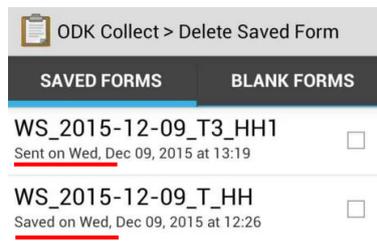


5. Make sure your phone is connected to the internet, and that you have correctly set ODK to send the data to your Kobo Account. Then send the form you have just finalized to the website.

6. If you go back to edit saved form, there will now be only one form left:



- 7. This is expected, because once a form has been sent to your Kobo account, it cannot be modified further on the phones.
- 8. The form you have sent is still on the phone however. If you go to "Delete Saved Form", you will see both the saved form (which is still available under "Edit Saved Form") and the one you have sent. Both can be recovered through Briefcase (see [Tool\\_4\\_2\\_SurveyManager\\_Troubleshooting](#))



#### IV. Exercise 3 – ODK- Navigate a saved form

##### IV.1.A. What we'll see

How to find specific information in a saved form and navigate efficiently.

##### IV.1.B. Prerequisite

- A saved form, with some groups in it. Fill a survey completely. At question B4a and B4b, answer that yes, you have collected water yesterday and have used **2 containers** (the volume and type don't matter).

##### IV.1.C. Exercise

1. Open ODK Collect, in the main menu.
2. Open the saved form you have filled for this exercise.
3. Retrieve and change the answer you gave, to the question E3b – Where do you dispose of your household waste?
4. Exit and save the changes.

1. Open the form again.
2. This time, retrieve the 2<sup>nd</sup> container used for transport yesterday (you are supposed to have entered 2 containers used for water collection).
3. Edit the volume that you have entered to 21 liters.
4. Exit and save the changes.

1. Open the form again.
2. This time, you must go to the very last page, in order to ensure that "Mark form as Finalized" is checked.

- Tip: when you open a saved form, there is a shortcut to go to the end directly, on the bottom right: 
- Mark it as finalized, then exit.

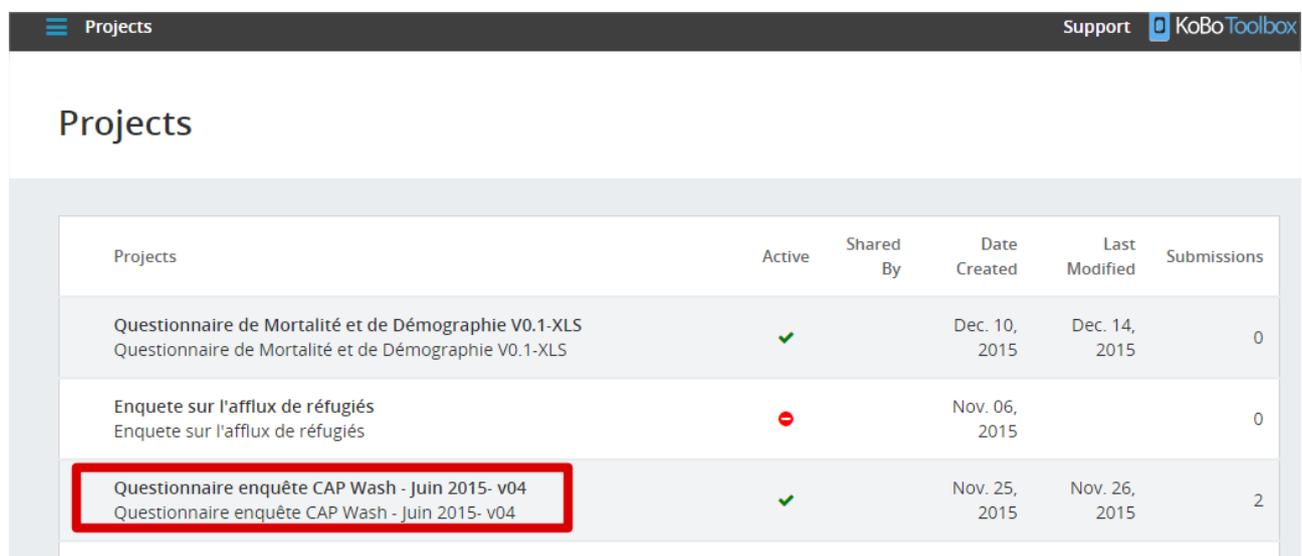
## V. Exercise 4 – Kobo – Upload an updated form

### V.1.A. What we'll see

Use different methods to upload a form that is already on Kobo for tests and training but for which the real deployment has not begun.

### V.1.B. Prerequisite

- Make sure you already have the WASH KAP (global or adapted) form on Kobo, with one or two submissions.



Projects	Active	Shared By	Date Created	Last Modified	Submissions
Questionnaire de Mortalité et de Démographie V0.1-XLS Questionnaire de Mortalité et de Démographie V0.1-XLS	✓		Dec. 10, 2015	Dec. 14, 2015	0
Enquete sur l'afflux de réfugiés Enquete sur l'afflux de réfugiés	✗		Nov. 06, 2015		0
Questionnaire enquête CAP Wash - Juin 2015- v04 Questionnaire enquête CAP Wash - Juin 2015- v04	✓		Nov. 25, 2015	Nov. 26, 2015	2

### V.1.C. Exercise

- Update the content of the form (directly on the XLS file: [Tool\\_1\\_2\\_PHS\\_WASH](#)) with a minor modification
- Try uploading the form to your Kobo account - you will, if you have not modified the ID of the form, see a message indicating that it cannot import the new form due to this. There are 3 possible methods to upload the modified form.

First method:

- Enter the existing project on Kobo, delete the existing submissions (by accessing the data through "view data in table", double clicking on a submission and deleting it)

- Return to the project page and notice that a new functionality has appeared now that there is no data relating to the survey existing. Click on it to update.

Global WASH Form PHS- test water

Global WASH Form PHS- test water

Submissions (0)      Photos      Add Data

View data in table    Analyze data    Download data    View gallery    Download all photos    Enter data in browser    How to collect data on mobile device?

Form

PHS-WASH-EN-test  Preview

Second method:

- Delete the existing project entirely in the project's settings

Projects      Support

**Project Settings**

Form Settings

Accept Submissions  YES

Existing Form Files [+ Add Document](#)

**Delete project with all data and its form**

**Delete**

How would you like to share your project

Share Project Publicly  NO

Share Data Publicly  NO

Share project with other users

Sharing by link is off  Turn on

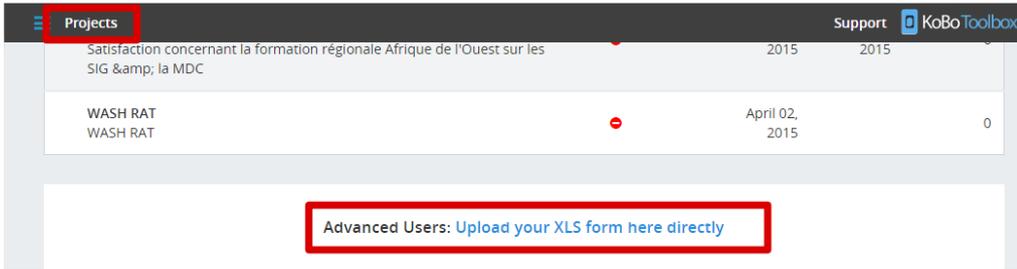
- franck26: Can View | Can submit to
- mdf: Can Edit | Can View | Can submit to
- sandracart: Can View | Can submit to

For user:

Perm type:

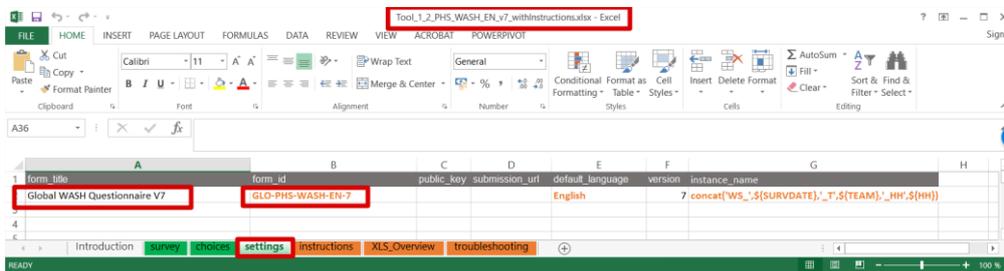
[Save Permissions](#)

- Upload your form from the general Project page



Third method:

1. Open your XLS form document in Excel
2. In the Settings tab, modify the ID, name and version number
3. Close the file and save it under a new name



4. Upload it to Kobo