ODK COLLECT SETTINGS

Some steps are mandatory (section 2 of this document), while others are preferences that can be adjusted to better suit the operational context (but the application will still work regardless of whether or not they are changed).

1. Prerequisite

- ➢ The XLS form. You can directly use this one without modification if it is only for testing, otherwise you will be required to modify it to :
  - ➢ See Step 3- WASH KAP mobile template v11
- ➢ The server has been setup and the XLS form uploaded.
  - ➢ Step 4- Setting up the survey system with Kobo Online.
- ➢ ODK Collect is installed on one phone (for testing) or all phones (deployment):
  - ➢ Step 4- Installing ODK on the phones
- ➢ Assuming all of the above have been done already, you can now proceed to configure ODK Collect.

2. Important parameters – MANDATORY

2.1. Setup the address (URL) for the server

In other words, you need to tell ODK Collect "where" to get the forms and to send the submissions for the survey it will use. To do this:

- ➢ The URL for the server, if you are using a Kobo Online account as described in Step 4- Setting up the survey system with Kobo Online, needs to be set:
  - o https://kc.humanitarianresponse.info/YOUR_Kobo_LOGIN
- ➔ Open ODK Collect (📋), tap the "Menu" button and choose "General Settings", then "Configure platform settings".
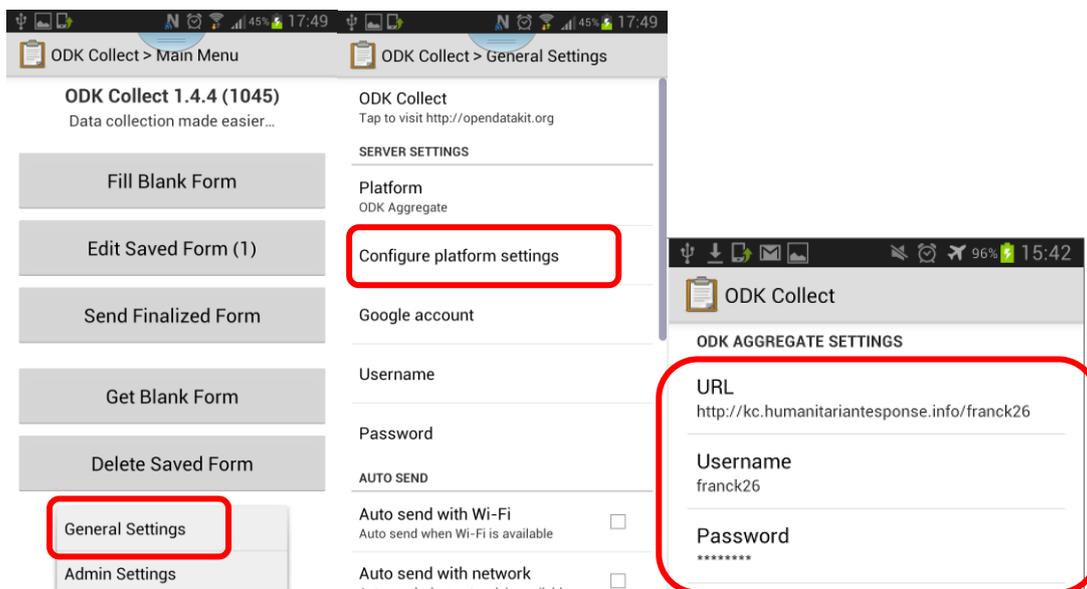
- ➔ You must then specify the address of your Kobo site. In the above example, the Kobo username was "franck26". Replace by your own:
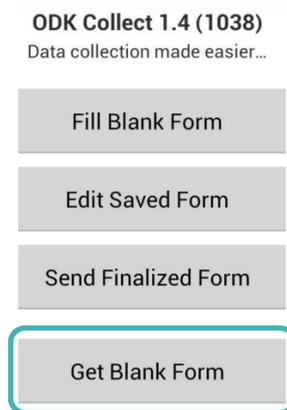
You can leave the username and password blank.

2.2. Download the survey on the phone

Once ODK Collect "knows" where to find the forms and to send the data, you must add the form(s) you will use on the phone. To do this:
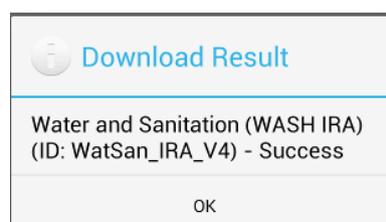
> ➢ Ensure that the phone is connected to the internet (through Wifi or SIM card with data)
> ➢ On Collect's main menu, choose "Get Blank Form":

> ➢ After a moment, a list of forms available on your account will appear. Those correspond to the Projects that the user has on his 'Project' page on KoboOnline. Choose the one(s) you need. Simply tick the ones that are needed, and then "Get Selected":
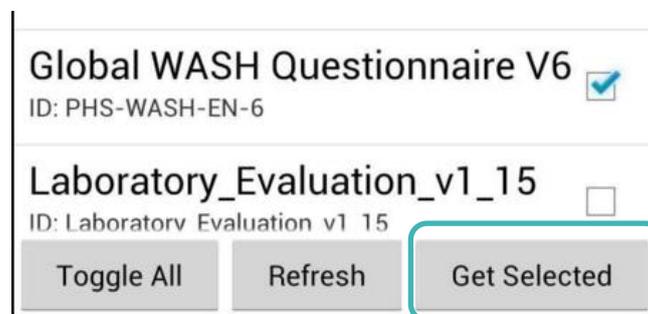
> ➔ A "Success" message tells you the download was successful, listing all the forms you just downloaded:


> ➔ If you get an error message when trying to visualize the list of forms (or else you cannot view the list at all):
>> o Check if you have entered the right URL. This is most often the problem.
>> o Check that your phone is actually connected to the internet.

o   Make sure that you did add your form to your Kobo Account, and that it was accepted. Make sure that you did it through the "Project" page and not the "Forms" page where it will only be considered as a draft

o   You can also tap "Refresh" to tell Collect to retry a connection

2.3. Sending data from phones to server

If you have already entered the URL, then you only need to go to "Send Finalized Forms" on the main screen once you have finished filling in your submissions. The forms you have filled that day or the last couple of days will automatically be submitted to the server, from where you will be able to download them as XLS file (see Step 4- Setting up the survey system with Kobo Online).
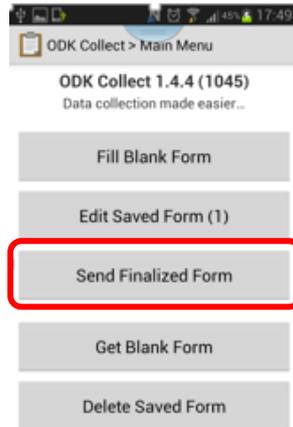

➜   If this does not work:
o   Make sure that your internet connection is working
o   Check that the right form (with the same ID) is on your Kobo website

3. Other parameters – Optional

This section is about choices you can make in the configuration of ODK Collect, depending on how you prefer to manage the survey. You can simply leave everything at their default value, or fine-tune according to your needs.

3.1. General Settings

By pressing the "Menu" button and choose "General Settings"
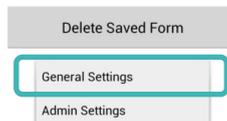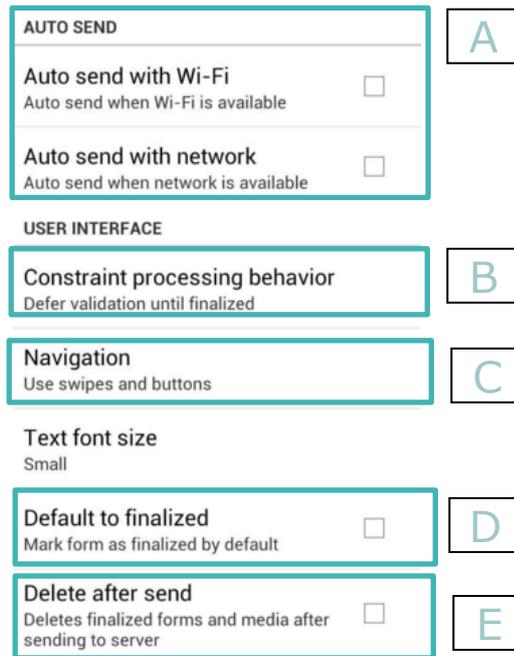
3.1.A. Auto-send with Wifi or with Network

If checked, then any form that is "finalized" will automatically be sent to the server as soon as Wifi, or Network, is available, without going through the "send finalised form" functionality.

This option isn't recommended for most operations. There is then no way to verify the data on the phone before send-off which is often preferable.

3.1.B. Constraint processing behavior
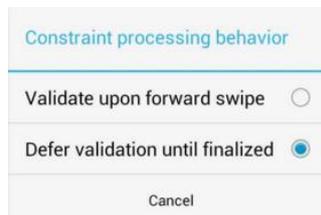
There are 2 ways to manage mandatory answers (can't be skipped) or restrictions on the answer that can be given (for example, the age of the respondent can't be less than 10 years or more than 100).

> ➢ The first option is to validate each question as soon as they are answered. If you try to swipe forward on a question that is mandatory or on which you have a constraint that is not respected, ODK Collect will refuse and demand that an answer be given before moving on.

> ➢ The second option is to defer validation until the user (or the survey manager) tries to "Mark as finalized" the form. If a mandatory question has been skipped, when the user tries to "Finalize" the form, it will bring him back to that question before accepting that the form be finalized. Just as a reminder, it is impossible to send a form to the website if it isn't finalized.

For newer enumerators, it is strongly recommended to validate each prompt upon forward swipe. The constraints in the survey are in place to prevent them from making mistakes. If the validation is done only at the end, it leaves room for them to make a lot of mistakes, and creates confusion. The survey manager can then end up with a phone that has many questions unanswered, but since the survey was done by someone else, it can be difficult to correct the mistakes or complete the form.

3.1.C. Navigation

The "navigation" option can be used to set how to move from one screen to the next. It can be swipe only, buttons at the bottom of the screen only, or both. On small screens, the buttons do take away some of the screen space and therefore using only swipes is recommended.

3.1.D. Default to finalize

The "default to finalise" will automatically check the "Mark form as finalized" box at the end of the survey:

If "Default to finalize" isn't checked, then either the enumerator will have to check it manually when he arrives at the end, or the survey managers after he verifies the data and wants to send it to the Kobo Account.

It can be practical to NOT default forms as finalized. This makes it easier to keep track of which form has been reviewed and checked by the survey manager or a supervisor. At least early in the survey, someone should review the work before it is sent to the website). The option can then be changed later on, if it is observed that data quality is acceptable and there is no need to systematically check every record every day.

3.1.E. Delete after send

Although it is recommended not to use the phones as a long-term storage, as long as the survey is ongoing it is reasonable to keep the forms on the phones. They can be deleted once the data has been collected and proper back-ups established. In most cases this option shouldn't be checked.

3.2. Admin settings

3.2.A. Setup admin password

In order to make any changes under this menu (Admin Settings), a password can be set. This may only be useful for very remote locations, where remote support is the only option available for debugging and there is a concern that enumerators may play with settings they shouldn't look into.

3.2.B. Hiding menus & options

The rest of the 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.

"Delete saved form" is likely to be the most useful one to hide. Remember that if you hide "Send Finalized Forms", then each evening when the survey manager wants to send the data to the server, he will have to un-hide the option, send the data and re-hide it, which can be time-consuming if one has numerous phones to deal with.