**WHO BeSD Project Standard Operating Procedure (SOP)**

|  |  |  |
| --- | --- | --- |
| **Title:** Use of ODKCollect and KoboCollect to collect BeSD survey data | | **Procedure Number:** 1 |
| **Author:** Mary Kay Trimner | **Implementation Date:** 2024-06-01 | **Revision Number:** 1 |

**Purpose: This document provides instructions on how to download the applications used to collect BeSD survey data (ODKCollect and KoboCollect), download the survey forms to each application, change the language of the survey, save incomplete surveys and submit the completed survey to the KoboToolbox website. It will also specify any specific phone permissions required to run the applications appropriately.**

**Note: These instructions are specifically for Android phones or tablets, as the applications used are not available for other operating systems. The screenshots in this SOP were taken from an Android phone; the appearance of screens may be slightly different on a tablet. Only one application needs to be downloaded to collect survey data. Choose the application (ODKCollect or KoboCollect) that best suits your needs.**

**Procedure: Download ODKCollect or KoboCollect**

1. Go to the Google Play Store on your Android device and download either the *ODKCollect* or *KoboCollect* app. Once the installation is complete, open the app.

A screenshot of a computer

Description automatically generated A screenshot of a computer

Description automatically generated

*Note: Going forward directions are the same for both applications. Any differences will be specifically called out.*

1. Select “*Configure with QR code*” and scan the QR code

Note: A pop-up may appear asking for the application to be allowed to “take pictures and record video”. Select “*While using the app*” or “*Only this time*” to be able to scan the QR code.

A screenshot of a phone

Description automatically generated A screenshot of a phone

Description automatically generated A screenshot of a phone

Description automatically generated A qr code with a cursor

Description automatically generated

**Procedure: Download Forms**

*Instructions are identical for both the ODKCollect and KoboCollect apps*

1. Select “*Download form”*

A screenshot of a phone

Description automatically generated

1. Select the desired form to download or click “*Select All*” to download all forms from the BeSD KoboToolbox site. Once the user has selected the correct form(s), click “*Get Selected*”

A screenshot of a phone

Description automatically generated

1. Once the form(s) have been successfully uploaded a notification will pop up on the screen; click “*OK”*

A screenshot of a phone

Description automatically generated

1. Click “+ *Start new form”*

A screenshot of a phone

Description automatically generated

1. Select the appropriate survey to begin

A screenshot of a survey

Description automatically generated

The user is now ready to begin collecting data.

*Note: The most recent version of the form will automatically download to the device.*

**Procedure: Change the survey language**

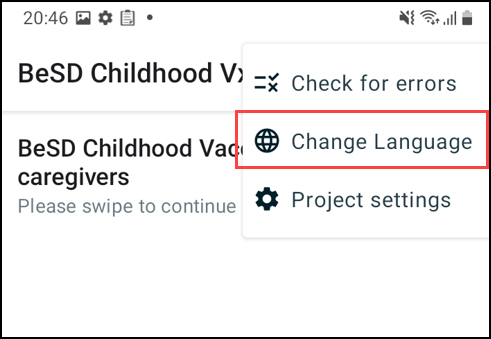
*Instructions are identical for both the ODKCollect and KoboCollect apps*

1. The default language for the form is English. To change the language, click on the 3 dots in the upper right corner once you have started the survey.

A screenshot of a computer

Description automatically generated

1. Select “*Change Language”*



1. Pick the appropriate language and the survey text will be updated.

A screen shot of a computer screen

Description automatically generated

*Note: Language can be changed at any time during the survey.*

**Procedure: Exiting survey before data collection is complete**

*Instructions are identical for both the ODKCollect and KoboCollect apps*

There may be some instances where a form has been started but the user does not wish to complete the survey collection. There are two main reasons this can occur: the survey was started in error, or the user cannot complete the survey but wishes to come back and finish it later. Both scenarios can be corrected at any time during the survey.

1. If the user is in the middle of the survey, simply exit the current form.

This is done differently based on the Android device. On some devices there is a “**<**” symbol at the bottom of the screen. In other devices the user will *swipe backwards*.



1. The below message will appear. Select the appropriate action.

A screenshot of a computer screen

Description automatically generated

**Discard Form** – Abandon the current survey. All data from current survey will be permanently deleted.

**Keep editing** – Return to the current survey and continue data collection.

**Save as draft** – Exit the current survey and save data as-is so that the user can return at any time to complete data collection.

1. If the user is at the end of the survey, but not ready to finalize the current survey, click “Save as draft”

A screenshot of a chat

Description automatically generated

1. To access surveys saved as a draft return to the main screen and click on “*Drafts*”.

A screenshot of a phone

Description automatically generated

1. A notification will pop-up explaining new capabilities in “Drafts”.

Click “*OK*”

A screenshot of a computer

Description automatically generated

1. Select the appropriate survey to complete.

A screenshot of a computer

Description automatically generated

*Note: With the new draft capabilities, the application will identify if the form contains any errors. All those with “No errors” can be finalized as is. Those with “Errors” must be corrected before submitting.*

1. To submit **ALL** forms in “*Drafts*” click on the three dots in the upper right-hand corner

A screenshot of a computer

Description automatically generated

1. Select “✓✓ *Finalize all drafts*”

A screenshot of a computer

Description automatically generated

1. A notification will appear asking “*Do you* *want to finalize ## drafts*”. Click “*Finalize*” to submit the drafts as they are.

*Note: Only forms with “*No Errors*” can be finalized.*

A screenshot of a phone

Description automatically generated

1. If any of the forms had “*Errors*” the below message will appear at the bottom of the screen

A white rectangular frame with black border

Description automatically generated

1. To submit a single draft form or correct the errors and finalize the draft, click on the desired form to submit.

A screenshot of a computer

Description automatically generated

1. Click on the appropriate field to change or select “*Go To Start*” or “*Go To End*” to go to the desired portion of the survey.

A screenshot of a phone

Description automatically generated

1. Select “*Go To End*” to be taken to the final screen in the survey.

Click “Send”

A screenshot of a message

Description automatically generated

*Note: If there are any errors in the survey the application will automatically go to the appropriate part of the survey so that the error(s) can be fixed prior to finalizing the survey.*

1. Once the draft has successfully been submitted a notification will pop up at the bottom of the screen

A blue and red rectangle with white text

Description automatically generated

Repeat steps 10-13 until all desired forms have been corrected and submitted.

**Procedure: Submit finalized survey form(s)**

*Instructions are identical for both the ODKCollect and KoboCollect apps*

Forms are set up to automatically send the completed surveys to KoboToolbox if a connection via WiFi or data is available.

1. Once the user has reached the end of the survey, click “*Send”* to complete the interview*.*

A screenshot of a message

Description automatically generated

If the form was successfully submitted a sound notification will *ding* on the device that says “Forms upload succeeded”

A screenshot of a phone

Description automatically generated

If the form was not able to be automatically submitted, it will appear in the “*Ready to send*” queue. Once the device has a WiFi or data connection it will automatically send the remaining forms to KoboToolbox.

However, this can also be done manually by completing steps **A**-**D**:

1. Go to the main page and click “*Ready to send*”

A screenshot of a phone

Description automatically generated

1. Select the individual forms to send to the KoboToolbox or to send all click “*Select All”*

A screenshot of a phone

Description automatically generated

1. Once all completed surveys are selected click “*Send Selected”*

A screenshot of a phone

Description automatically generated

1. Once the completed surveys have been successfully uploaded to the KoboToolbox website the following message will appear on the screen.

Click “*OK*”

A screenshot of a computer screen

Description automatically generated

1. If the form could not be uploaded one of the following messages will pop up on the screen. If the second error appears, click “*OK*”.

Check the device’s WiFi or data connection and try again. If you are unable to get a connection, wait until your WiFi/data connection is restored.

A grey rectangular sign with white text

Description automatically generated A screenshot of a computer error

Description automatically generated

*Note: “No network connection available” will be at the bottom of the screen*

**Procedure: Granting location permission to capture GPS coordinates**

When collecting a GPS location for the first time, the application will ask for permissions to access the device’s location.

Both ODKCollect and KoboCollect applications will ask the standard permission question (“Allow <app> to access this device’s location?”); users should select “*While using the app*”. The ODKCollect app also asks whether “*Precise*” or “*Approximate*” locations should be accessed; users should select “Precise”.

*Note: Selecting “While using the app” prevents this permission request from occurring each time the survey tries to access the GPS location.*

**ODKCollect**

1. Select “*Precise*”
2. Select “*While using the app*”

A screenshot of a phone

Description automatically generated

**KoboCollect**

1. Select “*While using the app*”

A screenshot of a phone

Description automatically generated

**Revision History**

|  |  |  |
| --- | --- | --- |
| **Revision** | **Date** | **Summary of Changes** |
| 1.0 | 2024/06/01 | Original Version |
|  |  |  |