



## Help - Getting started - Jumping in

Welcome to SurveyCTO!

Below, please find guidance on how to quickly get started using SurveyCTO. If you haven't already, you can see the overview section, which will orient you to the overall platform.

### Quick-start checklist

Here is a sequence of steps that will quickly acquaint you with all of the key components of SurveyCTO:

1. Navigate to the Design tab and, in the *Your forms and datasets* section, click + *Add your first form* and then *Start new form* to add a form to your server.
2. Title your new form "My first form", click the ON/OFF toggle next to *Use a sample form as your starting point?*, and select the first sample form, *The basics: Common elements in any form*. (For a step-by-step walk-through of this sample, you can click [here](#). But for right now, just continue with these steps...)
3. Press *Next* and then *Edit online* to edit your new form.
4. Once the form designer loads in another browser tab, click the "Would you like to continue?" question label to see details for that example consent question, and click the little + button next to the "begin group" to see the fields within the "consented" group.
5. Click *Save and deploy* in the upper-right, then click *Close* to return to the Design tab.
6. Navigate to the Configure tab and scroll down to find the *Your users* section. Click *Add user* to create a new user account for data-collection; name the user "collector", give this user "Data collection only" permission, and enter a password of 5 characters or more. (Be sure to remember or write down this password!)
7. Try filling out your form using the web:
  - Navigate to the Collect tab and, in the *Web data collection* section, click the *OFF* toggle on the right side to turn web data collection on for your server.
  - In the *Web data collection* section that opens up, click the *Fill out* action for your form.
  - Fill out your form. At the end, be sure that *Mark form as finalized* is checked before you save and submit.
  - Go back to the top of the *Web data collection* section of the the Collect tab and click the *ON* toggle on the right side to turn web data collection back off for your server (unless you want to

leave it on – it's up to you!).

8. Now try filling out your form using an Android device:

- Using the Internet browser on your Android device, navigate to **survey.wb.surveyccto.com/collect** and click on the link to download and install *SurveyCTO Collect*. **Note:** when installing from a URL (rather than Google Play), you will often be presented with a warning and will need to enable the manual installation of apps on that device (devices vary but will typically require navigating to your security settings to permit installation of unknown sources).
- Run *SurveyCTO Collect* on that device. Then from the main Collect menu, click your device's menu button, then click *General Settings*. Change the server name to **survey.wb** . Also enter the username ("collector") and the password you created earlier.
- Return to the main Collect menu, then choose *Get Blank Form*. Press *OK* when prompted to confirm the login information, select the checkbox next to your form's title, and press *Get Selected*. A pop-up message will appear confirming that the form was downloaded successfully; press *OK*.
- Go back to the main Collect menu, choose *Fill Blank Form*, and fill out your form. At the end, be sure that *Mark form as finalized* is checked before saving.
- Finally, back on the main Collect menu, choose *Send Finalized Form*. Check the listed form and click *Send Selected*. Press *OK* when the pop-up message confirms that the form was uploaded successfully.

9. Return to your server console and navigate to the Monitor tab. Your form should now reflect the proper number of submissions in the *Form submissions and dataset data* section. (If not, just click *Refresh*.)

10. A bit further down, in the *Form submissions and dataset data* section of the Monitor tab, click *Monitor form data* for your form in order to explore your submitted data.

- Click *Start Data Explorer* to open your submitted data into another browser tab.
- Click *Start by adding some field or relationship summaries*, *Add field summaries*, *Select all*, and then *Save now* to add summaries for all fields in your form.
- Scroll down and click on any blue numbers or graph elements to zoom in on individual submissions.
- Click *Save* in the upper-right to save your workbook so that you can return later and have the same summaries, in the same order, configured in the same way.

11. Return to your server console and navigate now to the Export tab and click the *Download* action in the *Your data* section. This will give you a .csv file that you can open in Microsoft Excel, Stata, or any other kind of spreadsheet or analysis software (though this particular data won't be that interesting).

12. You can stop here, or you can continue to export your data using *SurveyCTO Sync*, an application that offers many more export options:

- Download the *SurveyCTO Sync* application onto your computer, using one of the following links (which are always available on the Export tab): *SurveyCTO Sync* for Windows, *SurveyCTO Sync* for Mac, *SurveyCTO Sync* for other platforms.

- Run the Sync application by just executing the file you downloaded (it doesn't need any special installation). The first time you do, any or all of the following may happen: (a) it may need to install Oracle's Java environment (on which it relies); (b) it may need to upgrade your Java environment in order to support strong data security (if so, it will walk you through the process); or (c) it will ask you where on your local hard drive to store downloaded form data.
- In Sync's main window, mark *Server* as your Data source, enter your server name (" **survey.wb** "), your email address (the one you used to login to this SurveyCTO console), and your password; select *Local CSVs* as the data destination; choose a local directory to which you would like to export your form's data; and click *GO!*. Once your form appears in the form list, mark its checkbox and then click the next *GO!* button.
- Once it has finished downloading and exporting the data, observe that a new .csv file has appeared in your selected destination directory. You can open this file in Excel or some other program to view or analyze the data.

There are many options and variations for designing and uploading your forms, collecting data, monitoring submissions, and exporting data, but the above sequence should give you a good introduction to the end-to-end data process, and to all of the basic components involved.

If you want to see a sample form with more data to explore and export, navigate to the Design tab and, at the top of the *Your forms and datasets* section, click *Tools* and then *Add sample form*. Then, on the Export tab, click *Explore* and/or *Download* for the "Sample household listing form with sample data" form. That will give you a better idea how real data looks in SurveyCTO.

When you're ready to go further, click to learn more about designing and then deploying your forms with SurveyCTO.

## Migrating from ODK

SurveyCTO was built on the foundations of Open Data Kit (ODK), so migrating from ODK to SurveyCTO is easy. You can jump right in, but here are just a few things to keep in mind:

1. When you upload your survey forms to SurveyCTO (on the Design tab, click + and then *Upload form definition* in the *Your forms and datasets* section), you can upload your Excel or Google spreadsheet directly. There's no need to first convert your form to XML format.
2. Even if you are coming in with an ODK survey form, you should look at one of our form templates (on the Design tab, click + then *Start new form*, or download one of our sample forms). In particular, you might want to copy our *settings* worksheet into your form, so that you can give it a proper ID and title, easily keep track of the current version number, and more.
3. You can keep using ODK Collect, but *SurveyCTO Collect* is considerably better (using the Internet browser on your Android device, navigate to **survey.wb.surveyccto.com/collect** and click on the link to download and install *SurveyCTO Collect*).
4. Likewise, *SurveyCTO Sync* is considerably better than ODK Briefcase (download it from the top of the Export tab).
5. There are lots of resources here for you. For example, check out the comprehensive help topic on designing forms or our library of sample forms.
6. You're not alone. If you need help, you can visit our support center.

Welcome to SurveyCTO. We think that you'll like it here.