



## Help - Collecting data - Web data collection

Below, please find topics relating to web-based data collection (collecting data via a web browser).

### Using web forms

You can use SurveyCTO to collect data online via the web. Any modern web browser can be used to fill out forms, and it is up to you whether you require users to login before being allowed to fill out forms. Though an Internet connection is required to fill out forms, the server saves a temporary copy of each form as it is being filled out; users who lose their connections, reboot, or otherwise experience difficulties mid-form can resume filling out their forms by using the same web browser. Whenever they return, SurveyCTO will offer to resume where they left off.

By default, web data collection is disabled – so you can only collect data using *SurveyCTO Collect* on an Android device. To enable it, go to the Collect tab, scroll down to the section titled *Web data collection*, and click the toggle button to the ON position. Whenever that section is enabled, users will be able to go to this URL to find and fill out forms:

[https:// \*\*survey.wb\*\* .surveyccto.com/collect](https://survey.wb.surveyccto.com/collect)

Also by default, all of your forms will require users to login with an account authorized to collect data. In other words, no "anonymous" access will be allowed. From the Configure tab of your SurveyCTO server console, you can manage the list of authorized logins by scrolling down to the *Your users* section.

Or, to allow anonymous (not-logged-in) users to fill out one of your forms, scroll to the *Web data collection* section of the Collect tab, select a form from the list, click *Settings*, and check *Allow anonymous access*. Once you save that setting, users will no longer be required to login in order to fill out that form. (But be careful: this means that *anybody* can submit data!)

In the *Web data collection* settings for a given form, you can also control the "appearance" of that form. The default setting will size the form appropriately based on the size of the user's browser window. Alternatively, you can choose another appearance that makes the form itself smaller or wider. You might do this if you had designed your form for a small phone or tablet screen and wanted the web user interface to more closely approximate the dimensions of the phone or tablet. Since you can have users filling out forms on both Android and the web, you might want them to have similar experiences.

From the list of forms in the *Web data collection* section, you can also click *Fill out* to start filling out any of your forms, or click *Share* to retrieve a sharable link to the form itself. Users can login to [https:// \*\*survey.wb\*\* .surveyccto.com/collect](https://survey.wb.surveyccto.com/collect) to get a list of forms that they have permission to fill out, or they can click a link that you share with them to navigate directly to the form.

For users filling out forms anonymously, the interface is very simple: they just fill out and submit the form, and there are very few options available to them. Primarily, they can use a *Change language* option if your form includes multiple languages, and they can *Start over* if they so desire.

Logged-in users have more options while filling out forms. For example, they can change the "appearance" of the form, overriding the default set in the form's *Web data collection* settings. And, importantly, they can access the web version of the *SurveyCTO Collect* main menu, which closely resembles the menu of options available to Android users using the *SurveyCTO Collect* app. Users can *Fill Blank Form*, *Edit Saved Form*, and *Delete Saved Form* – and, if case management is enabled for your server, *Manage Cases*.

Logged-in users can save a partially-filled form and later finish it by returning to *Edit Saved Form*. But be careful: the list of saved forms under *Edit Saved Form* and *Delete Saved Form* is shared for everybody sharing a single login. If several people share the same login credentials, they will all see each other's saved forms. It is better to create separate user accounts for separate people so that they do not get confused by others' saved forms or have access to others' responses.

## Web form limitations

SurveyCTO's support for web forms includes a few limits that depend on your subscription level:

1. Number of web form submissions (per month): **20,000**
2. Maximum web file attachment size: **100MB**
3. Maximum web submission size: **250MB**

To manage your SurveyCTO subscription, go to the *Manage Subscription* section of the SurveyCTO website.

## Using custom links to pass information into forms

If you retrieve a sharable web link for one of your forms (click *Share* in the *Web data collection* section of the Collect tab), you will notice that the URL ends with a funny-looking (but suggestive) string: *?caseid=*. When sending links to people, you can append something unique to that URL, so that it ends more like *?caseid=A234C2* or *?caseid=John+Doe*.

If you use case management, you can simply append a unique case ID to the URL in order to pass that case ID into the form. Even if you are not using case management, you can use this ability to pass basically anything into your form; just be careful about which characters you append since not all characters are allowed in URLs: letters, numbers, and underscores are safe, you should include a *+* instead of a space (as in the "John+Doe" in the example above), and other special characters can only be included if encoded carefully.

If you do include something added onto the URL you share with users, you can pull that something into your form by adding a field with the *caseid* field type: this field will be invisible to the user, but it will automatically contain any case ID that was passed into the form (either via the regular case management user interface, or by virtue of a user using a URL that includes something added to the end). And actually, new forms begun with SurveyCTO automatically include such a field, just in case you're using case management; in the online form designer, you can check to make sure that it's included as a meta-data field in the *Form settings*. If you add "A234C2" to the end of the URL you share with somebody, for example, and the user uses that URL to

fill out your form, then "A234C2" would populate the form's *caseid* field (under whatever name you gave to that field). You can then show that field to the user or, perhaps, use it to load more data from a pre-loaded .csv file.