

Quick-start guide

Home > Getting started - Jumping in

Printed from: SurveyCTO Product Documentation

Source URL: <https://docs.surveycito.com/01-getting-started/02-first-steps/01.starting-from-scratch.html>

Last updated: 2022-12-15

This guide walks you through how to quickly get started using SurveyCTO.

Keep in mind that there are many options for designing and uploading forms, collecting data, monitoring submissions, and exporting data. Browse the rest of the [SurveyCTO documentation](#) and [Support Center resources](#) for more guidance, or try our self-paced [online training course](#) to learn more.

 For a more visual guide, check out our quick-start guide in the support center, which includes slideshows that you can click through at your own pace.

Design and test your form

You can create your forms by using our [online drag-and-drop form designer](#), or one of our [sample forms](#). These instructions will guide you on how to do both.

Create your own form

1. Navigate to the [Design](#) tab.
2. In the *Your forms and datasets* section, click *+ Add your first form* and then *Start new form* to add a form to your server.
3. Title your new form "My first form". Make sure the ON/OFF toggle next to *Use a sample form as your starting point?* indicates "OFF".
4. Press *Next* and then *Edit online* to edit your new form.
5. Once the form designer loads in another browser tab, click *+ Add your first field or group*. In the *+ Add visible field* tab, you will see all of the possible field types that you can add. Click on the text field option, and insert the the question text "What is your name?". (To view more information about a field, you can click on the question-mark box to the right of the field type name.)
6. Click *Configure*. Add a name for the field ("name"), and indicate that a response is required (it should be selected by default). Click *Save now*. You will see the field appear in your form.
7. To test your form, click *Test* in the top-right to toggle over to the test view. You can preview how your form looks and works; open the *Form inspector* panel on the right (either with the magnifying glass on the top right, or with the *Form inspector* button on the top orange bar) to reveal additional details

and tools; save and resume progress from earlier testing sessions; and submit real data to test your downstream data processes. You have the option to save your progress and save or discard any data you submit. When you finish testing your form, click *Design* in the toggle to return to the design view.

8. Click *Save and deploy* in the menu, then click *Close* (or close the web browser tab you are on). Return to the *Design* tab.

Use a sample form

These are instructions on how to download a short sample survey form. If you would like to see a sample form that has demonstration data attached to test downstream processes, we have included those instructions separately below. This can be helpful for demonstrating the *Data Explorer*, SurveyCTO's built-in monitoring and visualization tool, or exporting data to external platforms for further analysis.

1. Navigate to the *Design* tab.
2. In the *Your forms and datasets* section, click *+ Add your first form* and then *Start new form* to add a form to your server. (If you already have a form added, such as *My first form* described before, click on the plus (+) above or below that form.)
3. Title your new form "Sample form". Click the ON/OFF toggle next to *Use a sample form as your starting point?* to indicate "ON," 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.)
4. Press *Next* and then *Edit online* to edit your new form.
5. 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.
6. In the "consented" group, click the little + button next to "begin group" to see the fields within it. If there is a - (minus) button instead, the group should already be expanded.
7. To test your form, click *Test* in the top-right to toggle over to the test view. You can preview how your form looks and works. When you finish testing your form, click *Design* in the toggle to return to the design view.
8. Click *Save and deploy* in the menu then click *Close* (or close the web browser tab you are on). Return to the *Design* tab.

Use a sample form with example data

1. Go to the *Design* tab.
2. Near the top, right beneath *Your forms and datasets*, click on the *Tools* button on the left.
3. On the bar that appears, select *Add sample form*.
4. At the popup, select where on your server you would like this form to be added, then click Yes. This will add a form titled *Example household listing form with example data* to your server. This data will help you explore the other components of the platform right away, without needing to wait for responses to your own forms.

Collect data

Only a SurveyCTO "user" can collect data. These instructions will show you how to add users and fill out your form in two ways: using a web browser, and using the *SurveyCTO Collect* app on mobile phones and tablets.

Add users

Please note that only users with higher permission levels can add users.

1. Navigate to the [Configure](#) tab.
2. Scroll down to find the *Your users* section. Click *Add user* to create a new user account for data-collection.
3. There are multiple user options. For demonstration purposes, name the user "collector", give this user "Data collection only" permission in the *User role* field, and enter a password of 8 characters or more. (Be sure to remember it!)

Fill out forms using a web browser

1. Navigate to the [Collect](#) tab.
2. In the *Web data collection* section, click the ON/OFF toggle to turn web data collection on for your server.
3. In the section that opens up, to the right of the title of your form, click *Fill out*.
4. Fill out your form in the new window that opens. At the end, be sure that *Mark form as finalized* is checked before you save and submit.

Fill out forms using the SurveyCTO Collect app

1. Connect your mobile device to the Internet and [install SurveyCTO Collect](#).
2. When it completes installing, open the *SurveyCTO Collect* app.
3. If asked, select *Allow* to each permission popup. This will give the SurveyCTO app permission to use the device's location and media, record audio, and function fully.
4. At the next popup, select *Configure* to enter its *General Settings*. Change the server name to your server name, and enter the username ("collector") and password you created earlier.
5. Return to the main Collect menu. Choose *Get Blank Form*.
6. Press *OK* when prompted to confirm your login information.
7. Select the checkbox next to your form's title and press *Get Selected*.

8. A pop-up message will appear confirming that the form was downloaded successfully; press *OK*, then go back to the main Collect menu.
9. Choose *Fill Blank Form*, and fill out your form. At the end, be sure that *Mark form as finalized* is checked before saving.
10. On the main Collect menu, choose *Send Finalized Form*.
11. Check the listed form and click *Send Selected*. Press *OK* when the pop-up message confirms that the form was uploaded successfully. (If you are currently offline, you can send the submission once you are back online.)

Monitor data

These instructions will guide you on how to use the *Data Explorer*, SurveyCTO's built-in monitoring and visualization tool.

1. Return to your server console, and navigate to the [Monitor](#) tab.
2. In the *Form submissions and dataset data* section, your form should now reflect the proper number of submissions, to the right of *Complete submissions* (if not, just click *Refresh*).
3. In the *Form submissions and dataset data* section, click *Monitor form data* for your form in order to explore your submitted data.
4. Click *Start Data Explorer* to open your submitted data into another browser tab.
5. To add summaries for all fields in your form, click the following: *Start by adding some field or relationship summaries*, then *Add field summaries*, then *Select all*, and finally *Save now*.
6. You can click on any blue numbers or graph elements to zoom in on individual submissions.
7. Click *Save* in the upper-right menu to save your workbook so that you can return later and have the same summaries, in the same order, configured in the same way. You can also create multiple workbooks for the same form data, if you wish.

Export data

These instructions will guide you on how to export your data in two ways: downloading it directly from the server console, and using the *SurveyCTO Desktop* application.

Download directly from the server console

1. Return to your server console, and navigate to the [Export](#) tab.
2. In the *Your data* section, choose your form and click *Download form data* on the right, then *Export files*. Depending on which file format you selected, this will give you an .xlsx file (for Excel), an .sav file (for SPSS), or a .csv file that you can open in any kind of spreadsheet or analysis software. If you used the short sample survey form, the collected data won't be as substantive as the data in the sample household listing form.

Download using SurveyCTO Desktop

To experience the most flexible and powerful way to export your data, you can install [SurveyCTO Desktop](#) on your desktop or laptop computer.

1. Download the [SurveyCTO Desktop](#) application onto your computer, and install it.
2. Run *SurveyCTO Desktop* and configure the desktop that will hold all of your data and settings. You'll just need to provide a name and choose where on your hard drive you'd like to store copies of synchronized data. Once you're set up, you'll land on the *Sync your data* screen.
3. Click *Log in to a new server*, enter your SurveyCTO server name and email address, and click *Next*. Then enter your password to log in.
4. Next, for the data destination, click the first *Browse* button to choose a folder into which you would like to export your data. Then click *Continue*.
5. Choose the form (or forms!) you would like to export, then click *Continue*.
6. Finally, click the *Run now* button to sync and export your data. Once it has finished downloading and exporting, observe that a new .csv file has appeared in your selected destination directory. You can open this file in Microsoft Excel, Stata, or any other kind of spreadsheet or analysis software.

[SurveyCTO Desktop](#) can help you to synchronize data between your computer and one or more SurveyCTO servers – and even between your computer and other computers, or between your computer and mobile devices. It provides a wide range of data export formats and options, plus: powerful tools for working offline; convenient access to the server console, [Support Center](#), and other online resources; and more.

Likewise, the SurveyCTO platform has much more to offer, beyond what this quick-start guide reveals. [Click here](#) to learn more about other resources available to you as you get to know SurveyCTO.