



HOLPA Online tool

USER GUIDE

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INTRODUCTION

What is HOLPA?

HOLPA is a survey-based tool for collecting evidence of the holistic impact of agroecology. It contains three modules: context, agroecology adherence, performance (global, local). It is applicable at plot, farm-household, or landscape levels (only piloted at farm-household level so far).

The survey is developed for use with the Open Data Kit (ODK), and there is a standardised set of R scripts to enable quick calculation of global performance and agroecology indicators.

One of the key features of HOLPA is the inclusion of localised indicators. In addition to the global survey, HOLPA includes a comprehensive 7-step localisation process, to enable teams to tailor the survey to best meet the needs of local stakeholders, including the farmers themselves.

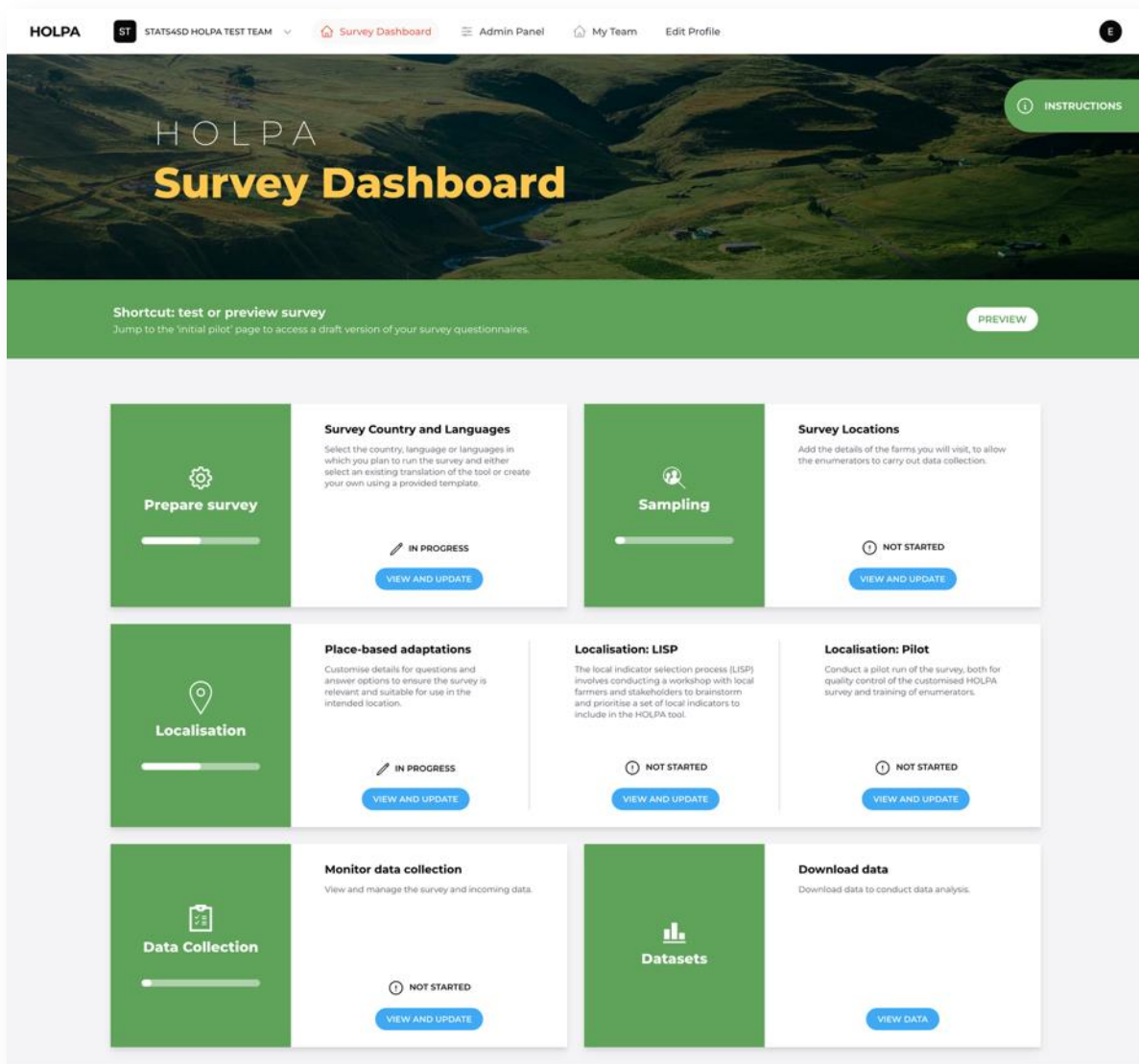
Online Tool

The "HOLPA Online Tool" is a web-based platform that guides teams through the process of setting up, localising and implementing the survey.

This document provides guidance on using the HOLPA online tool to prepare and carry out a localised implementation of the HOLPA survey. This guide is primarily concerned with the usage of the online tool; for more guidance on using HOLPA, please contact CGIAR.

DASHBOARD AND PROCESS OVERVIEW

The image below shows the HOLPA survey builder dashboard. Here you can see an overview of the tasks required to prepare and deliver the survey, and you can keep track of your progress.



The dashboard contains sections for each of the different tasks that need to be done to prepare and implement HOLPA. They are sorted into headings for different aspects of the process.

Below is a brief overview of each heading:

Prepare survey

This is where you indicate the country and language (or languages) in which you will be preparing the survey, and select or provide the translated versions of HOLPA to be used. This will generate the forms which you will be customising and using throughout the rest of the process. You will not be able to complete some other steps until you have selected a country, language and translation.

Survey locations

Here, you will provide the details of the farms/locations to be visited. This is necessary to allow enumerators to conduct the survey; and possibly for data analysis later on.

Localisation

The localisation process is a crucial aspect of the implementation of HOLPA. The HOLPA tool aims to balance harmonisation and comparability between results with specific adaptations to ensure those results are applicable and useful at a local level. The localisation sections allow you to adjust the HOLPA survey to ensure it is relevant to the target audience. These sections are:

- 'Place based adaptations', which allows you to adjust details of the survey such as a suitable time frame to ask about recent events, and the specific foods, crops, animals and other units which might be asked about, so that the answer options make sense in the context. At the end of this section, you are prompted to conduct an initial pilot to check the sense and functionality of the survey.
- The local indicator selection process (LISP), which involves holding a workshop with local farmers and stakeholders to identify a set of contextually-specific indicators to include in the HOLPA tool. You can then add those local indicators into the customised HOLPA tool.
- A full pilot test of the customised HOLPA survey, allowing for quality control and for training of enumerators. After completing these activities, it may be necessary to return to previous sections and make changes to your survey.

Data collection

When you commence data collection for your survey, you can monitor, review and edit submissions here.

Download data

Quickly retrieve all the data collected for your customised HOLPA survey. From there, you may conduct your own analysis or whatever else you wish to do.

Completing the sections

DO I NEED TO COMPLETE THE SECTIONS IN ORDER?

The sections do not have to be completed in order. Although they are in a logical sequence, most users will probably go back and forth and revisit sections. You can mark sections as complete to keep track of your work, but you can still make changes in a "completed" section.

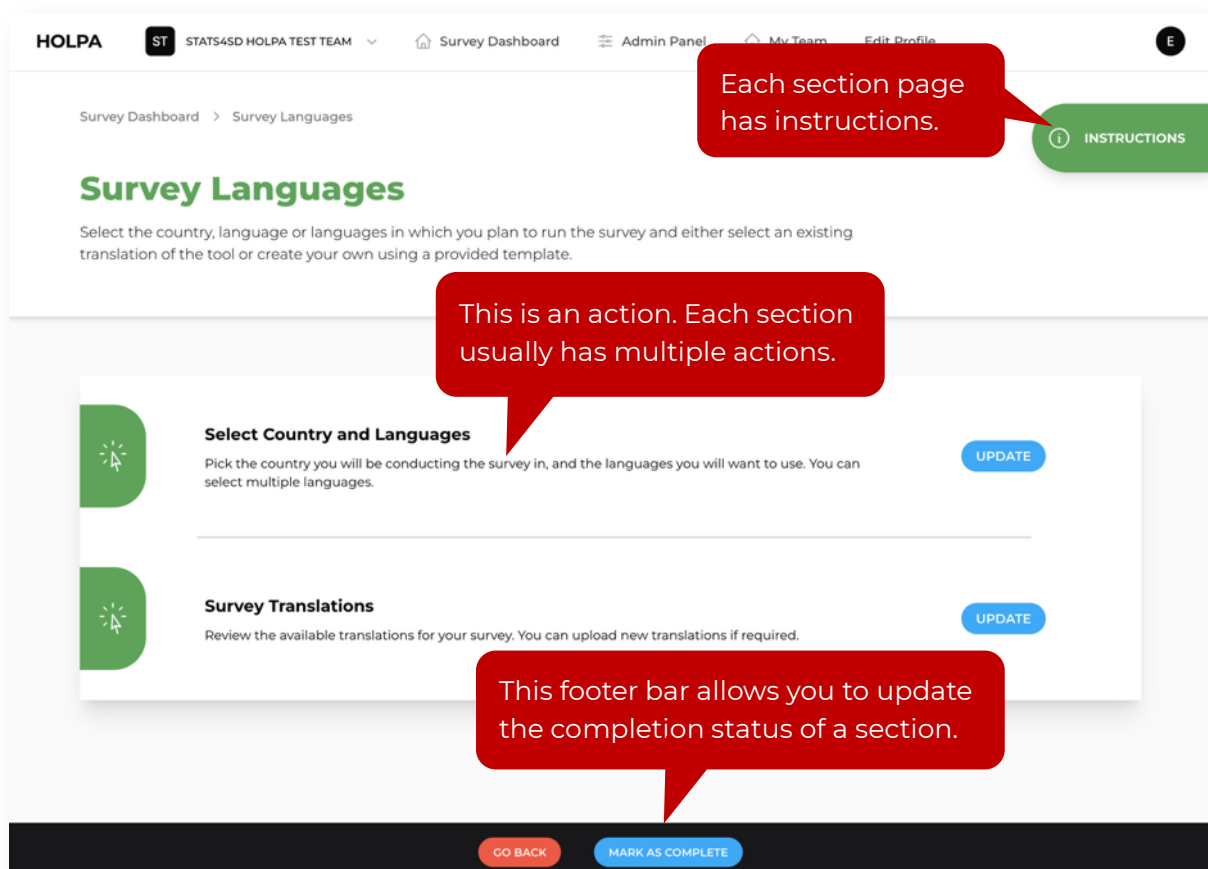
Be aware that making some changes out of order may necessitate revisiting other steps; for example, if you add an extra language late in the process, you may then need to go back to localisations such as custom questions to add the appropriate text in the new language.

HOW DO I COMPLETE A SECTION?

Each section contains:

- Instructions
- Actions
- Completion tracking

Here is an example of the page you will see when you click to go to a section.



Features of a section page, showing actions and completion tracking options.

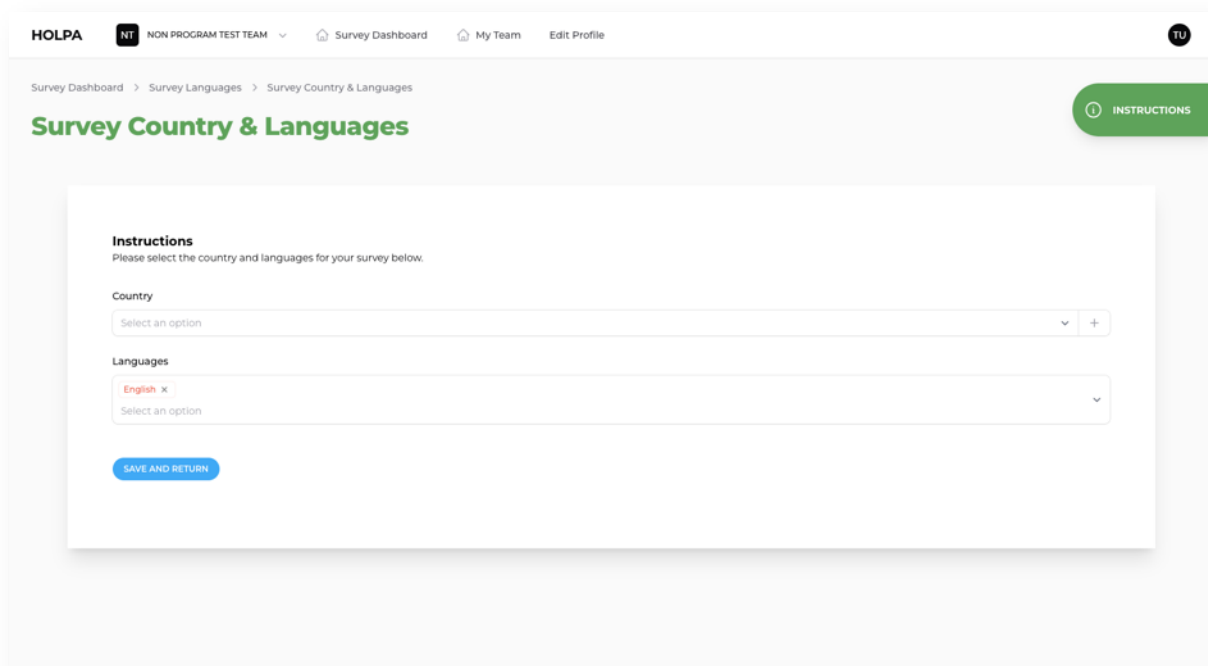
Instructions

Each section page and action page has an instructions button, which you can click to show guidance for the page you are looking at.



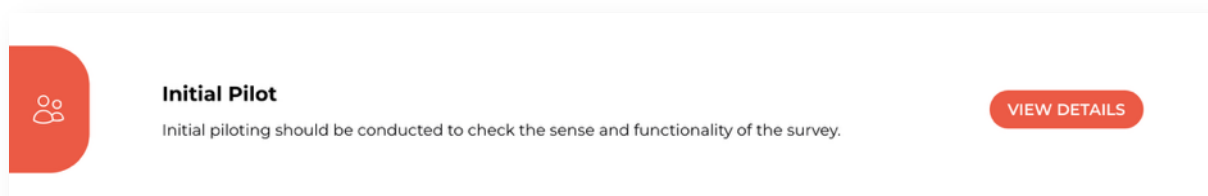
Actions

Within each section, there are usually multiple actions. Most actions will have options and prompts for you to add information or adjust elements of your survey. For example:

A screenshot of a web application interface. At the top, there's a navigation bar with 'HOLPA' and 'NT NON PROGRAM TEST TEAM' on the left, and 'Survey Dashboard', 'My Team', and 'Edit Profile' on the right. Below this, a breadcrumb trail reads 'Survey Dashboard > Survey Languages > Survey Country & Languages'. The main heading is 'Survey Country & Languages' in green. On the right, there's a green 'INSTRUCTIONS' button. The central content area is a white box with a light gray border. It has a section titled 'Instructions' with the text 'Please select the country and languages for your survey below.' Below this, there are two dropdown menus. The first is labeled 'Country' and has a placeholder 'Select an option'. The second is labeled 'Languages' and has a placeholder 'Select an option', with 'English' selected and shown in a red pill. At the bottom of the box is a blue button labeled 'SAVE AND RETURN'.

An example of an action page, showing options to input or adjust to prepare the survey.

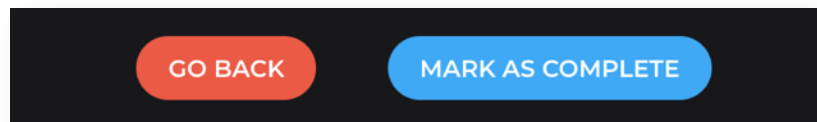
Some actions are prompts for tasks that take place outside of the tool, such as the local indicator selection workshop. You will see these actions in orange and with a different icon on the section page:

A white rectangular card with a red rounded rectangle on the left side containing a white icon of two people. To the right of the icon, the text 'Initial Pilot' is in bold. Below it, a line of text says 'Initial piloting should be conducted to check the sense and functionality of the survey.' On the far right of the card is a red rounded rectangular button with the text 'VIEW DETAILS' in white capital letters.

Example of an offline action as shown on a section page.

Completion tracking

When you are finished with a section, mark it as complete using the button at the bottom of the screen; this will help you and your team keep track of your progress. You can later revert it to incomplete if you realise you need to make additional changes.



Progress tracking options shown in the footer bar of a section page.

SURVEY LANGUAGES

The first step to set up the survey is to select the country and languages in which your team will conduct the survey. Bear in mind that if you change these details later, you may need to review some of the other steps.

Survey country and languages

A screenshot of the 'Survey Country & Languages' page. The page has a breadcrumb trail at the top: 'Survey Dashboard > Survey Languages > Survey Country & Languages'. On the right, there is a green 'INSTRUCTIONS' button. The main content area is titled 'Survey Country & Languages' and contains an 'Instructions' section with the text 'Please select the country and languages for your survey below.' Below this, there is a 'Country' section with a dropdown menu showing 'Select an option' and a '+' button. A red callout bubble points to the '+' button with the text 'Type or select from the dropdown menu to add the country.' Below the country section is a 'Languages' section with a tag 'English x' and a text input field with 'Select an option'. A red callout bubble points to the input field with the text 'Type in this box to search and add languages.' At the bottom left of the form is a blue 'SAVE AND RETURN' button. A red callout bubble points to this button with the text 'Use this button to add a country.'

Survey country and languages section page.

CHOOSE A COUNTRY

Start by selecting the country for the survey. You can click in the box and either scroll through the dropdown list or start typing to narrow down the options and find your country. If the country you need is not listed, you can use the "plus" button to add it.

A modal window titled 'Create' with a close button (X) in the top right corner. It contains four input fields: a dropdown menu for 'Select the region for this country' with 'Northern America' selected; a text field for 'Enter the name of this country' with 'Example Country' entered; a text field for 'Enter the ISO Alpha-2 code for this country' with 'CA' entered; and a text field for 'Enter the ISO Alpha-3 code for this country' with 'CAN' entered. At the bottom are two buttons: 'CREATE' (red) and 'CANCEL' (grey).

Creating a new country.

When you click to add a new country, a menu will appear. You will need to input the region, a name for the country, and the ISO Alpha-2 and Alpha-3 codes. You can use this online resource to find the codes: <https://www.iso.org/obp/ui>

The platform assumes that you are working within one country. If you are conducting HOLPA across multiple countries, you will need to create separate teams within this platform for each country. Please contact the HOLPA support team if you require assistance with this.

CHOOSE A LANGUAGE

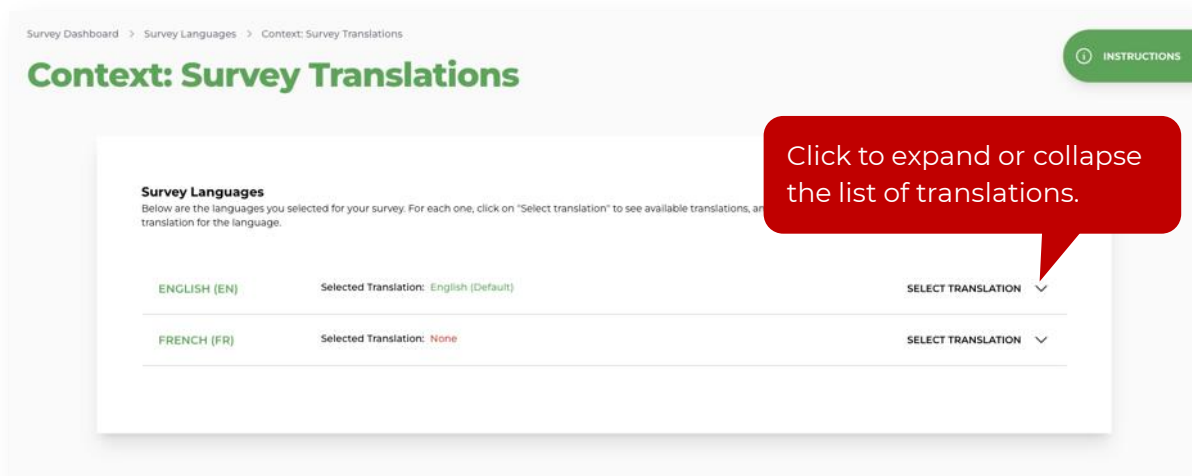
You can then start adding the languages in which you will conduct your survey. If you are going to run your survey in multiple languages, all of them need to be added here.

Start typing in the box to find and add languages. Press enter or click to select a language. You can remove a language with the backspace key or by clicking the x next to it.

A section titled 'Country' with a dropdown menu showing 'Canada'. Below it is a section titled 'Languages'. It features a search bar with 'fre' entered, a red border around the search bar, and a dropdown arrow. Below the search bar is a list of languages: English (with a red 'x' next to it), French, Breton, Cree, Greek, Afrikaans, Herero, and Korean.

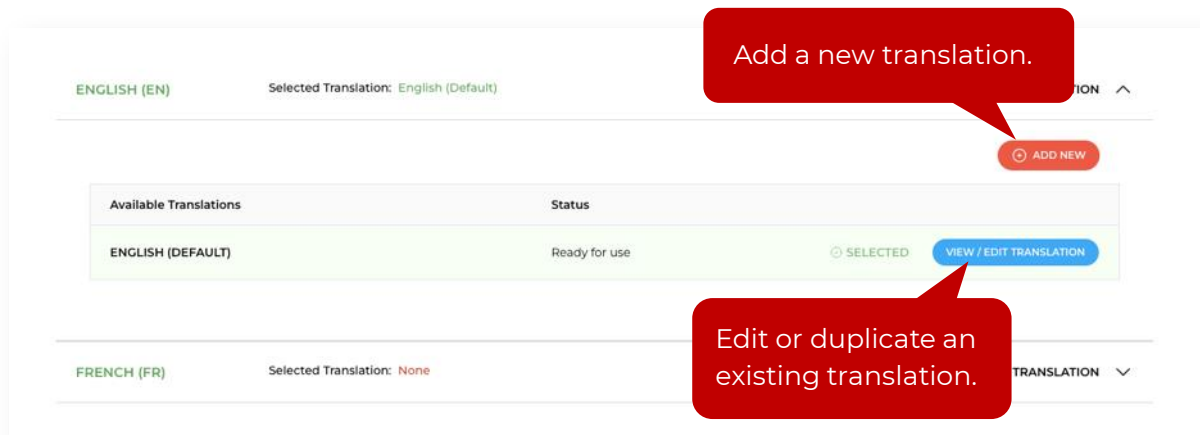
Selecting languages from the menu.

Survey translations



The survey translations action page.

When you have selected the languages for your survey, you should review the available translations. HOLPA is available in multiple languages. On the translations page, for each of the languages you selected previously, you will need to select the translation to use. Click "Select translation" to show the available translations for a language.



Expanded view of available translations for English.

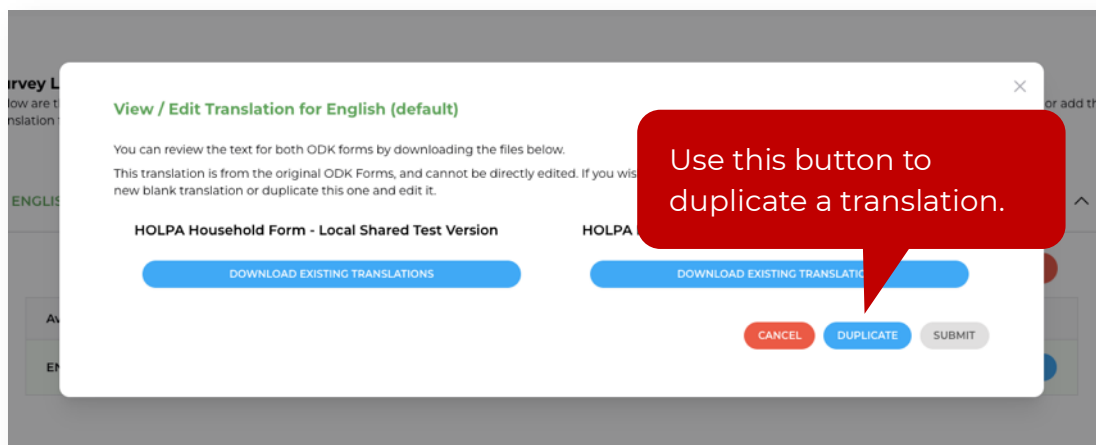
From this view, you can:

- Click "select" to use an existing translation.
- Duplicate an existing translation and edit it.
- Create a new translation from scratch.

Duplicate an existing translation

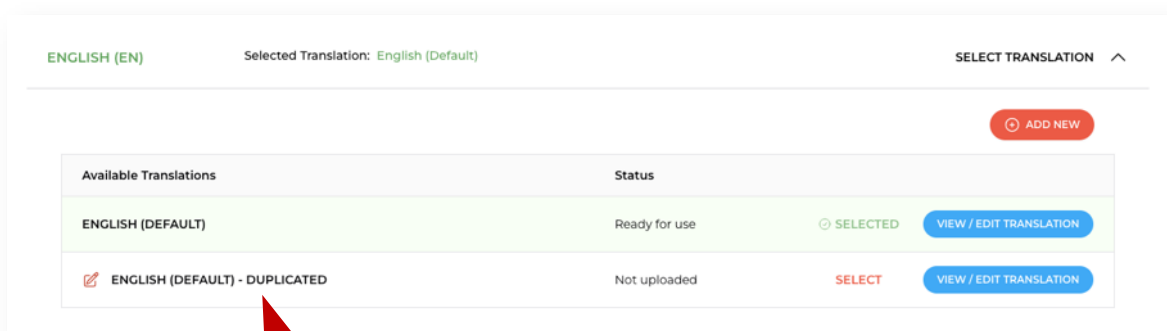
You may wish to duplicate an existing translation to use as a starting point; this is especially useful to create a regionally specific version of an existing translation.

Find the translation you wish to duplicate, and click the view/edit button. A menu will appear. From here, you can download the translation file if you would like to view this translation before selecting or duplicating it. This menu will not have edit options unless the selected language was added by your team.



View/edit menu for a language. This is a “default language” and so editing options are not available.

Click the duplicate button, and you will see the new translation appear in the table. By default, the new translation will be called “*Original translation name – duplicated*”. To rename it, click on the name in the table view, and a box will appear to allow you to input and save a new name.



The duplicated translation has appeared in the list.

Click the view/edit button for this new translation; the menu that appears will have more options to allow you to make changes.

View / Edit Translation for English (default) - duplicated

You can review the text for both ODK forms by downloading the files below.

To edit the translations:

1. Download the Existing translations file. After downloading the file, open it in a spreadsheet editor. Use the translated text into the final column, titled English (default) - duplicated.
2. The Excel file contains a list of every string in the form. Use the translated text into the final column, titled English (default) - duplicated.
3. Re-upload the completed Excel file below.

HOLPA Household Form - Local Shared Test Version

DOWNLOAD EXISTING TRANSLATIONS

DOWNLOAD EMPTY TRANSLATION TEMPLATE

Upload completed HOLPA Household Form - Local Shared Test Version translation file

Drag & Drop your files or [Browse](#)

HOLPA Fieldwork Form - Local Shared Test Version

DOWNLOAD EXISTING TRANSLATIONS

DOWNLOAD EMPTY TRANSLATION TEMPLATE

Upload completed HOLPA Fieldwork Form - Local Shared Test Version translation file

Drag & Drop your files or [Browse](#)

[CANCEL](#) [DUPLICATE](#) [SUBMIT](#)

Options to edit the duplicated translation.

Download the existing translations if you want to make changes using the duplicated language as a starting point. There is one file for each of the two forms for HOLPA (fieldwork and household).

In the spreadsheet file that you download, you will see all the text in the survey form. Make your desired changes in the rightmost column (with the heading matching the current name of your new translation). Make sure you only edit the text in this column, and do not change the column heading, or you may encounter an error when you try to upload the updated translation.

	C	D	E	F
1	name	translation type	English (default)	English (default) - duplicated
2	context	label	**1. Context**	**1. Context**
3	language	label	Please select language you are using to complete this survey	Please select language you are using to complete this survey
4	language	hint	***NOTE***: This is the language shown on the device, not the language you will use to speak to the farmer.	***NOTE***: This is the language shown on the device, not the language you will use to speak to the farmer.
5	time_frame	label	We need this information to show options for some questions in the appropriate language.	We need this information to show options for some questions in the appropriate language.
6	location_note	label	Gets the defined time period for many questions (default 'last 12 months')	Gets the defined time period for many questions (default 'last 12 months')
7	location_note	hint	Please select the correct location using the following questions	Please select the correct location using the following questions
8	district_id	label		
9	new_district	label		
10	sub_district_id	label		

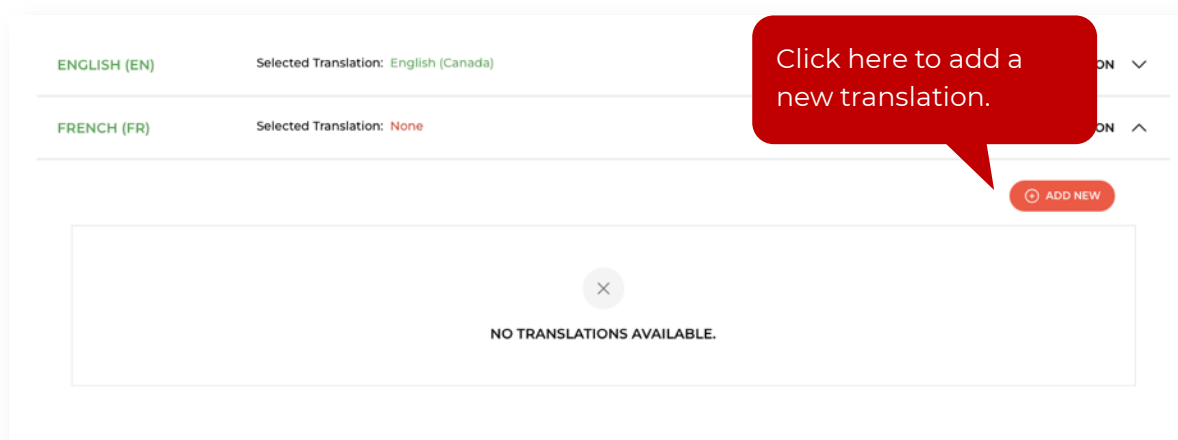
Make changes in this column only.

Using a spreadsheet to update the translation.

When you are ready to upload your edited translations, return to the view/edit menu for your new translation, and either drag and drop or click in the boxes indicated to upload the files.

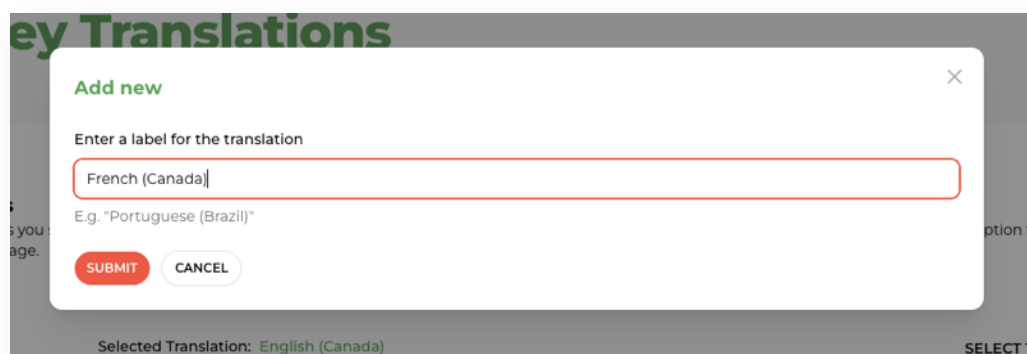
Add a new translation

If there is no existing translation, or the available translations are not suitable for your survey location, you should add a new translation.



No translations are available in this example.

To add a new translation, click on "add new" and give it a clear name.



Enter a name for the new translation.

The translation will appear in the table. You can then use the "view/edit" menu to download the translation template, exactly as described with a duplicated translation in the instructions above.

Add the translated text in the indicated column in the xls files, then reupload them using the same menu. Once both forms have translated versions uploaded, the translation will be available for use.

When editing or adding a translation, make sure you download the file for the language you wish to edit, and make the changes in that file. If the column headers do not match the original file or if the column for the translated text is left blank, you will see an error message when you upload the files.

Note: when adding translations

The translation is to reflect the text as written in the HOLPA survey; this is not the appropriate place to customise the content of the survey.

Translations added by other teams or from the original ODK forms cannot be directly edited, but you can duplicate the translation to make a new version with your changes.

The HOLPA platform will make user-uploaded translations available to all other teams.

Mark this section as complete when:

You have selected the country, languages and added a global HOLPA survey translation for each language.

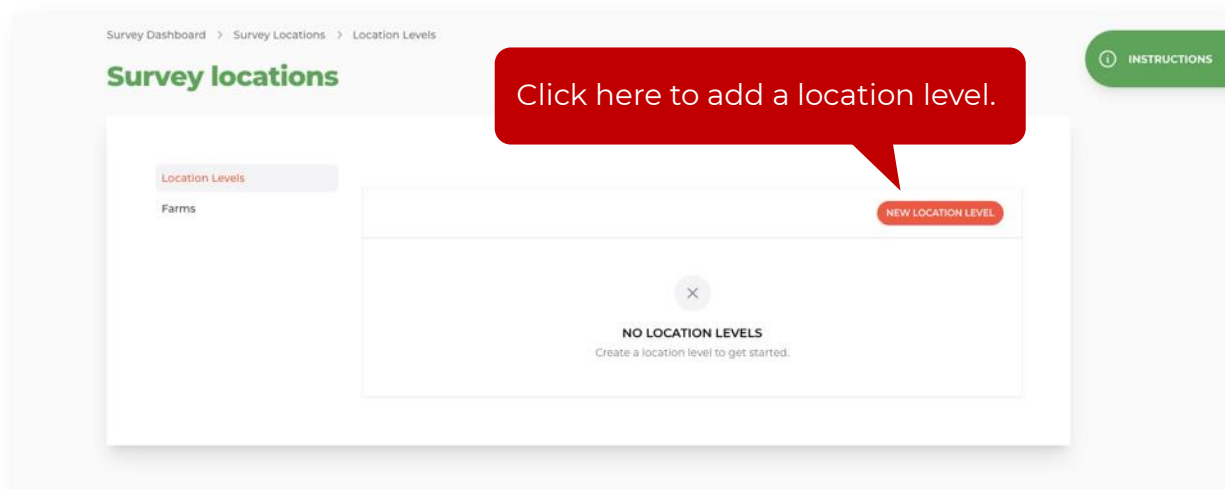
SURVEY LOCATIONS

To enable enumerators to conduct the survey, and possibly for data analysis later on, you will need to add details of the farms you will visit, including the details of the different location levels.

Location levels

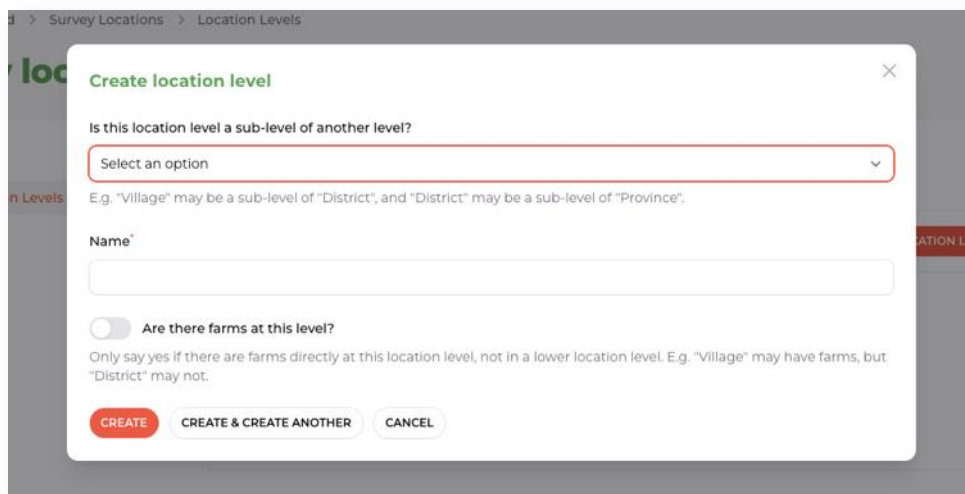
The system by which geographic locations are organised and denoted will vary between places (some countries are organised into counties and towns, some have provinces and districts), so you will need to first input the details of the hierarchy, and then fill in the specific locations for your survey.

For example, a farm might be located in a village, which is in a district, which is in a province, so you would need to add the location levels province > district > village.



The location levels action page. No location levels have yet been added

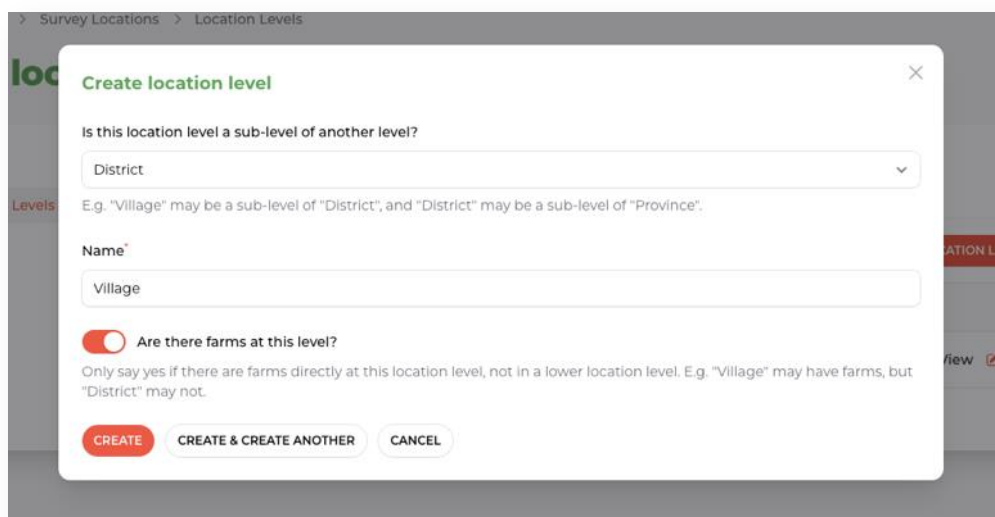
On the location levels page, you first need to add the names of the different levels. To do this, click on "new location level". A menu will appear.

A screenshot of a web application showing a 'Create location level' dialog box. The dialog has a title bar with a close button. Inside, there's a question 'Is this location level a sub-level of another level?' followed by a dropdown menu with 'Select an option' and a downward arrow. Below this is an example text: 'E.g. "Village" may be a sub-level of "District", and "District" may be a sub-level of "Province".' Then there's a 'Name*' label and an empty text input field. Below that is a toggle switch labeled 'Are there farms at this level?' which is currently turned off. Under the toggle is more example text: 'Only say yes if there are farms directly at this location level, not in a lower location level. E.g. "Village" may have farms, but "District" may not.' At the bottom are three buttons: 'CREATE' (red), 'CREATE & CREATE ANOTHER' (grey), and 'CANCEL' (grey).

Adding a new location level.

Here, you will need to:

- Indicate whether the location level you are adding is a sub-level of another level (in our province > district > village example, district is a sub-level of province and village is a sub-level of district.)
- Add the name for the level.
- Indicate whether there are farms at this level. This means that they are within this level but not in a lower sub-level; for example, there are farms at the village level but not the province level.
- Click to create the level, or to create and immediately add another level.

A screenshot of the same 'Create location level' dialog box, but now filled with data. The dropdown menu for 'Is this location level a sub-level of another level?' is set to 'District'. The 'Name*' text input field contains the word 'Village'. The 'Are there farms at this level?' toggle switch is now turned on (red). The example text and buttons remain the same as in the previous screenshot.

Adding "Village" as a location level below district.

Survey Dashboard > Survey Locations > Location Levels

Survey locations

INSTRUCTIONS

Select a location level in the sidebar or from the table to add locations.

Location Levels

- districts
- sub-districts
- villages
- Farms

NEW LOCATION LEVEL

<input type="checkbox"/>	Name	Parent	No. of Entries	Has farms	
<input type="checkbox"/>	district	Top Level	2		View EDIT
<input type="checkbox"/>	sub-district	district	4		View EDIT
<input type="checkbox"/>	village	sub-district	8		View EDIT

The location levels have been added, and you can start adding locations to each level.

Once you have added levels, you can select them to view a list of the locations that have been added at that level and add locations. You have the option to import them from an excel file or add them manually.

Survey Dashboard > Survey locations > Districts

Survey locations

List of Districts

Bulk add a list of locations by importing information from a spreadsheet file.

IMPORT DISTRICTS

Location Levels

- Districts
- Sub-districts
- Villages
- Farms

Key Details

Level

District

Parent Level

District List

ADD NEW DISTRICT

NO LOCATIONS

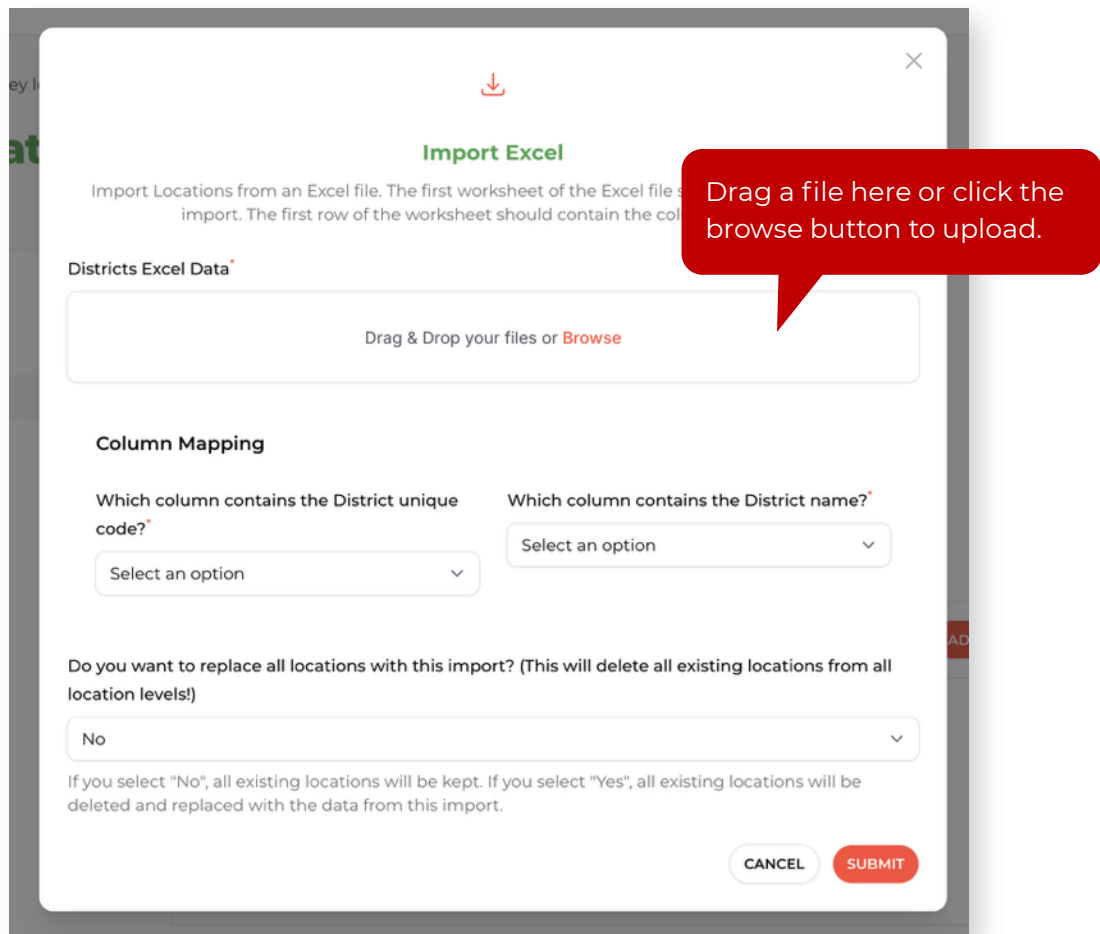
Create a location to get started.

Add locations manually one at a time.

Page showing no locations have been added yet for the district level. You can import or manually add locations.

IMPORTING LOCATIONS

When you click the import locations button, a box will appear allowing you to upload a spreadsheet file and map the columns as needed.



The screenshot shows a modal window titled "Import Excel" with a red download icon at the top. Below the title, there is explanatory text: "Import Locations from an Excel file. The first worksheet of the Excel file will be used for import. The first row of the worksheet should contain the column headers." A section labeled "Districts Excel Data" contains a large white box with the text "Drag & Drop your files or [Browse](#)". A red callout bubble points to this box with the text "Drag a file here or click the browse button to upload." Below this is a "Column Mapping" section with two dropdown menus: "Which column contains the District unique code?" and "Which column contains the District name?". Both dropdowns currently show "Select an option". At the bottom, there is a question: "Do you want to replace all locations with this import? (This will delete all existing locations from all location levels!)" with a dropdown menu set to "No". A small note below states: "If you select 'No', all existing locations will be kept. If you select 'Yes', all existing locations will be deleted and replaced with the data from this import." At the bottom right are "CANCEL" and "SUBMIT" buttons.

Options to upload a spreadsheet with location information and map the columns

You will need to upload an excel spreadsheet with the required details:

- A column with the name of the location.
- A column with the unique IDs for the locations. (These can be generated however you like, but each one must be unique).
- If the location level you are adding to is a sub-level of another location level, then you need to also have a column with the name and unique ID of the location in the level above (in our province > district > village example, "Village A" might be located in "District C", and you would need to include the details of both.)
- The first row of the worksheet should contain column headings, not your first location.
- Make sure the data to be imported is in the first worksheet of the spreadsheet.
- It does not matter what order the columns are in, what column headers you use, or if other data is in the spreadsheet.

	A	B	C	D	
1	ID	Village name	District	District ID	
2	V01	Village 1	District 1	D01	
3	V02	Village 2	District 1	D01	
4	V03	Village 3	District 2	D02	
5	V04	Village 4	District 2	D02	
6					

Example of a list of villages to import as locations.

Once you have uploaded the list, use the column mapping options to select the column for names and the column for unique code. You have the option to override all previously added locations with the new locations from the uploaded spreadsheet. When you are ready, click submit.

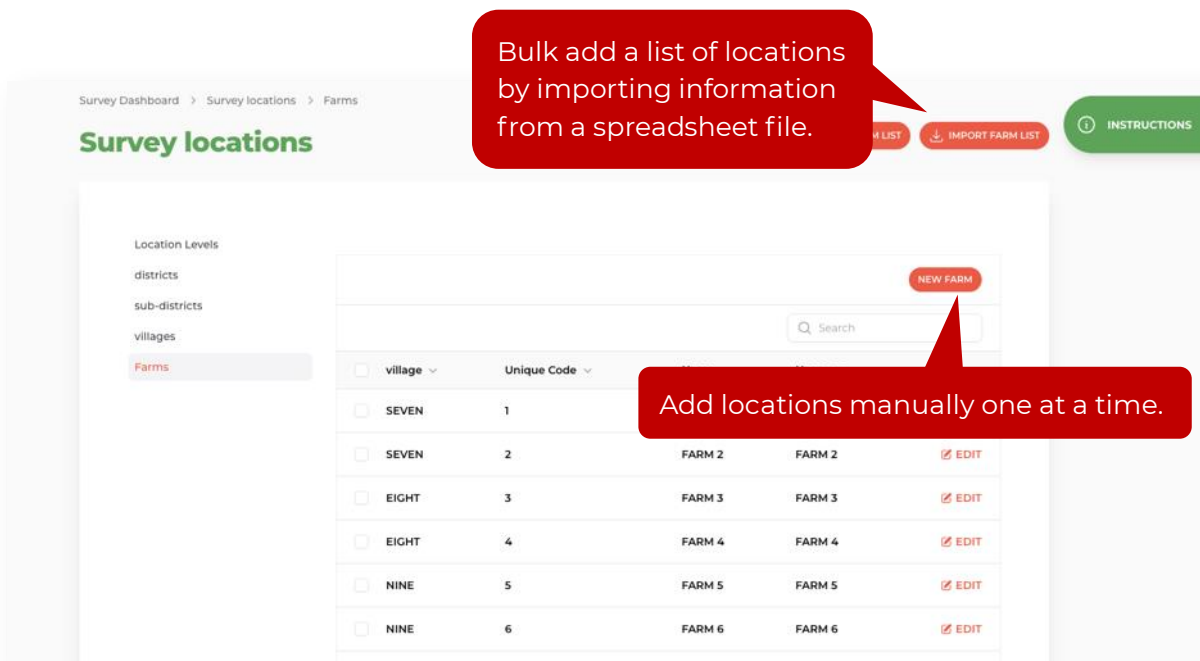
ADDING A LOCATION MANUALLY

To add locations manually, click on "Add new [location name]", and type in the name and code, then click on "Create" or "Create and create another". Add locations for all the location levels.

Adding locations manually.

List of farms

The next action is to add the details of all the farms that you will visit in your survey. Similar to adding locations, you can add farms manually or import a list from a spreadsheet file.



Farms page, with different ways to add farms.

IMPORTING FARMS

To import a list of farms, the spreadsheet should be set up with the same structure as when adding locations at other levels – i.e. the information should be on the first worksheet, and the first row should be column headings. When importing a list, you will need to include columns with the farm unique code and the unique code for the location it is in.

	A	B	C	D	E	F	
1	farm_id	farm_name	year of first engagement	district	subdistrict	village	
2	T001	Farm Of T001	2021	Zone 1	Woreda Number 5 Kebele 5.3		
3	T002	Farm Of T002	2018	Zone 1	Woreda Number 4 Kebele 4.2		
4	K138	Farm Of K138	2018	Zone 1	Woreda Number 4 Kebele 4.2		
5	K1013	Farm Of K1013	2020	Zone 1	Woreda Number 1 Kebele 1.1		
6	K2205	Farm Of K2205	2018	Zone 1	Woreda Number 5 Kebele 5.2		
7	K2304	Farm Of K2304	2016	Zone 1	Woreda Number 1 Kebele 1.3		
8	K1874	Farm Of K1874	2018	Zone 1	Woreda Number 5 Kebele 5.3		
9	K43937	Farm Of K43937	2018	Zone 1	Woreda Number 2 Kebele 2.2		
10	K1332	Farm Of K1332	2019	Zone 1	Woreda Number 5 Kebele 5.3		
11	K1160	Farm Of K1160	2020	Zone 1	Woreda Number 2 Kebele 2.1		
12	K43938	Farm Of K43938	2020	Zone 1	Woreda Number 1 Kebele 1.1		
13	K38852	Farm Of K38852	2016	Zone 1	Woreda Number 2 Kebele 2.1		
14	K3112	Farm Of K3112	2019	Zone 1	Woreda Number 4 Kebele 4.1		

Example of farms list spreadsheet for import.

When you upload the list, you need to select the location level the farms are located in, then map the columns for unique IDs and any other custom fields for information you wish to include. These are separated between identifying information, such as farm name or family name, and properties of the farm, such as size.

Import Excel

Import Farms from an Excel file. The first worksheet of the Excel file should contain the data to import. The first row of the worksheet should contain the column headings. You must have already created or imported the locations that the farms will be associated with.

Farms Excel Data

TestFarmImport.xlsx
15 KB

Upload complete
tap to undo

Please make sure your data is in the first worksheet of the Excel file, and that the first row contains the column headers.

Location

Which location level are the farms linked to?

village

For many sampling strategies, this will be obvious (the lowest level. It may be less obvious when there are different hierarchies of locations in different places.

Which column contains the village unique code?

village

Farm Information

Which column contains the farm unique code?

farm_id

e.g. farm_id or farm_code

Are there any additional columns that contain identifiers for the farm? Tick all that apply.

Options for importing a farm list.

ADD A FARM MANUALLY

The screenshot shows a 'Create farm' modal window. At the top, it has a title bar with a close button. Below the title, there are two main input fields: a dropdown menu labeled 'Select the village for this farm' and a text input field labeled 'Please enter a unique code to identify this farm for your team'. The form is divided into two main sections: 'Personally identifiable information' and 'Other Farm Information'. The 'Personally identifiable information' section includes a sub-section 'Identifiers' with a table for adding key-value pairs. The 'Other Farm Information' section includes a sub-section 'Properties' with a similar table. Both tables have an 'ADD ROW' button. The background of the application is visible, showing a sidebar with navigation options like 'board', 'Su', 'y loc', 'ation Levels', 'tricts', 'o-districts', 'ages', and 'TMS'. On the right side, there are buttons for 'NEW FARM' and 'IMPORT', and a list of 'EDIT' buttons.

Create farm

Select the village for this farm

Please enter a unique code to identify this farm for your team

Personally identifiable information

This section lets you add any information about the farm or farmer that lets your enumerators personally identify the farm / farmer.

Identifiers For example: farm name, name of household head, phone number, physical address.

Key	Value
ADD ROW	

Information added here will be available to your team through data downloads, and if required can be included in the ODK survey to help enumerators ensure they reach the correct farms. However, it will never be included in any final data products that are intended for sharing beyond your team, and no-one outside of your team will have access to it.

Other Farm Information

This section lets you add information about the farm that is not personally identifiable.

Properties For example: gender of household head, active member of (name of your intervention project) - yes / no, farm typology information

Key	Value
ADD ROW	

The purpose of information here is to allow you to disaggregate results by these variables. For example, if you are interested in comparing results from farms that took part in a specific training activity with farms that did not take part, you should include that as a variable here. Variables entered here will be available in exported datasets so they can be used in your analysis.

Menu to add a farm manually.

To add a farm manually, click the “add farm” button and fill in the details on the menu that appears. You can add the same optional identifiers and properties of the farms as needed.

Mark this section as complete when

You have added all the location levels, locations, and a full list of the farms where you will conduct the survey.

LOCALISATION: PLACE-BASED ADAPTATIONS

The localisation sections allow you to adjust the HOLPA survey to ensure it is relevant to the target audience. Customisations you make in these sections will only affect the localised version of the survey used by your team. The global survey translation selected or uploaded earlier in the process and shared with other teams will remain unchanged.

In this first section, "Place-based adaptations", you can customise certain question and answer options that will appear in the forms. For example, in different geographical locations, farmers would be growing different crops and different staple foods would be commonly consumed; the options in the questionnaire should reflect this.

Time frame

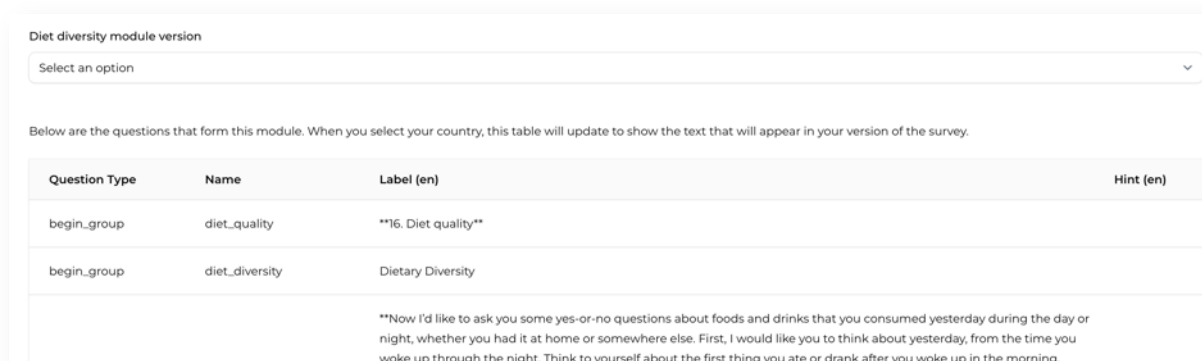
The first thing you can customise is the time frame that is asked about for questions concerning the recent past. By default, this time frame is "In the last 12 months". However, for your survey, it might make more sense to ask the questions about "last season" or "last year".

Customise and preview the time frame that is asked about in the questionnaire.

The **page shows questions in the survey** that use the time frame. Whatever phrase is used for the time frame will be inserted into the question in place of the "\${time_frame}" text placeholder. Look through them, determine what time frame is most appropriate and, if you decide to change it, update the timeframe text in the box. Your entry will be automatically saved and the question text in your survey form will be updated.

Diet Diversity module

HOLPA uses an internationally validated indicator for "dietary diversity". The questions in this section ask whether members of the household have consumed anything from specific food groups within the last 24 hours, such as grain food, tubers, pulses, green veg, etc. The default survey has all the needed questions but does not include lists of locally contextualised example foods for each group.



Diet diversity module version

Select an option

Below are the questions that form this module. When you select your country, this table will update to show the text that will appear in your version of the survey.

Question Type	Name	Label (en)	Hint (en)
begin_group	diet_quality	**16. Diet quality**	
begin_group	diet_diversity	Dietary Diversity	

**Now I'd like to ask you some yes-or-no questions about foods and drinks that you consumed yesterday during the day or night, whether you had it at home or somewhere else. First, I would like you to think about yesterday, from the time you woke up through the night. Think to yourself about the first thing you ate or drank after you woke up in the morning.

The diet diversity module page, showing the dropdown to select an option, and previews of the affected questions.

The platform can incorporate localised versions of the questions from the Global Diet Quality Project, which add relevant example foods for each category customised for over 100 countries. If you would like to include these in your survey, select the suitable country from the list of available countries.

The page shows the questions that will appear in the survey, so you can review the default and the localised versions with examples, and decide what to use for your survey.

Contextualise choice lists

There are some questions in the survey where the appropriate answer options will be different depending on the location context - for example, questions that ask about crops that are grown on a farm should not include lots of options for plants that do not grow in the location being surveyed, and should include the most commonly grown crops in that area. Questions should also reflect the units of measurement that are used in the location.

The "Contextualise choice lists" page has several choice lists to be checked and customised. You can select from the lists on the left-hand side, then review the existing options. Options can be removed from the context, so they will not be included in this questionnaire, and you have the option to add new options

Each list page includes the option to view the questions that will use these answer options. Check these to ensure you provide suitable options.

Survey dashboard > Place-based adaptations > Contextualise choice lists

Contextualise choice lists

Select a list from the sidebar to view or edit.

You can preview the affected questions here to check the phrasing.

Add an entry to the list.

Remove options that shouldn't be displayed in this context.

Choice Lists

- area_unit
- yield_unit
- fert_unit

area_unit

The list below includes the units that are currently active in this context. Please ensure it is appropriate for your context. You may add new entries and remove existing entries.

Questions that use this list within HOLPA

ADD NEW AREA_UNIT

list_name	name	label:English (Canada)	Localised Entry	
area_unit	1	HA (1 HA = 1 HA)	⊗	REMOVE FROM CONTEXT
area_unit	2	Acres (1 Acre = 0.4 Hectares)	⊗	REMOVE FROM CONTEXT
area_unit	3	Metres-Squared (1m2 = 0.0001 Hectares)	⊗	REMOVE FROM CONTEXT

Options to customise the choice lists.

ADDING A CHOICE LIST ENTRY

Click on the add [unit name] button to add a new entry to the choice list.

You will need to add a name and label in each language your survey is using, then click "create", or "create and add another" to save the entry.

Place-based adaptations > Contextualise choice lists

Create choice list entry

Name*

Grams

Add Labels for the following languages:

Label:English (Canada)*

Grams (1G = 0.001KG)

Label:French (Canada)*

Grammes (1G = 0.001KG)

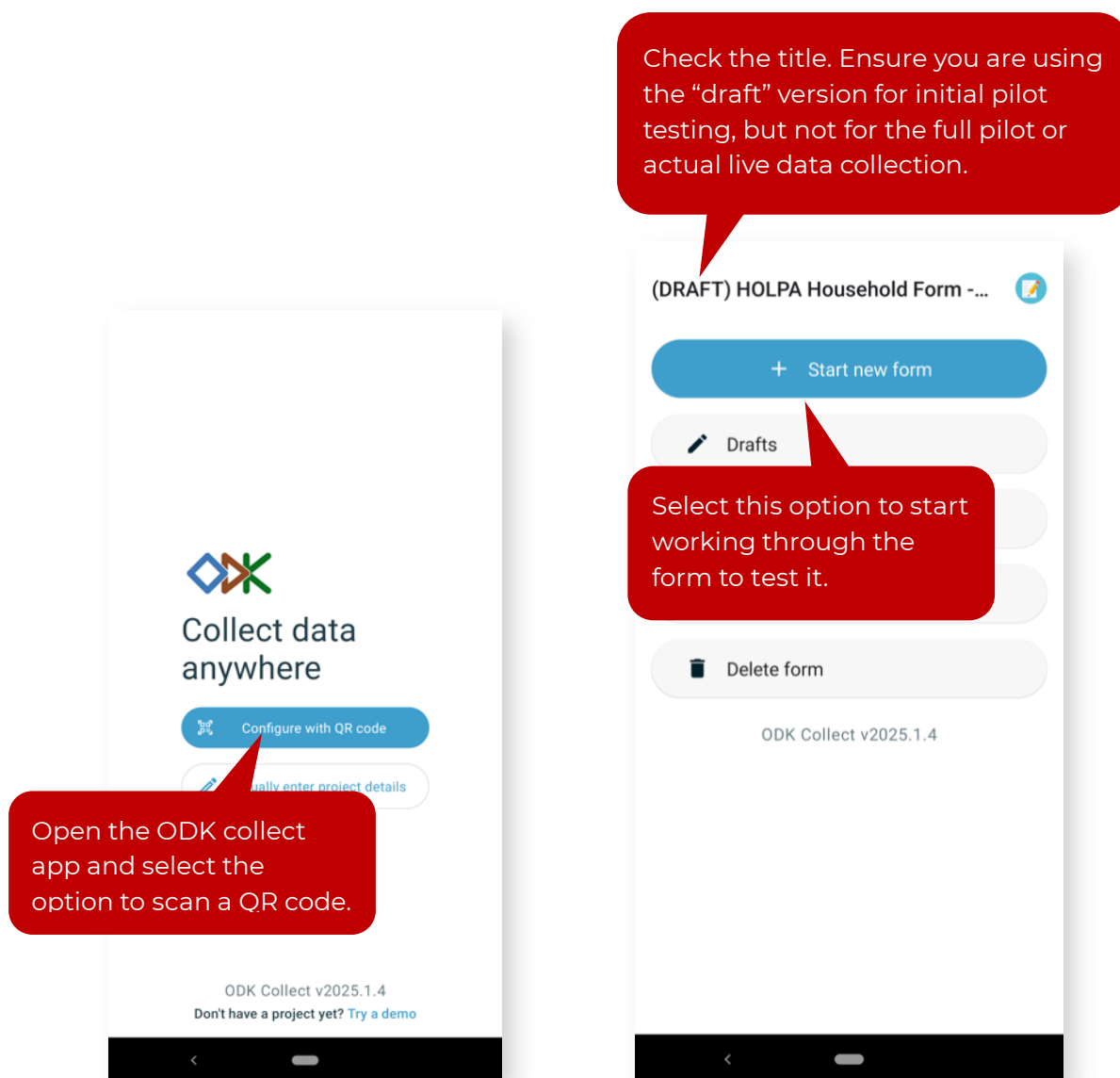
CREATE CREATE & CREATE ANOTHER CANCEL

Adding a choice list entry.

Following customisation, a pilot test should be conducted to check the sense and functionality of the survey. This should be carried out by a member of your team along with at least one local researcher or practitioner.



Note that this QR code should only be used for this initial testing - the 'data collection' section contains a different link for the full pilot and live data collection, and it is important to use the correct version of the survey. Ensure that everyone is using the correct version of the forms before proceeding with the pilot or any data collection.



Accessing the draft forms in ODK

You can view submissions from the test forms at the bottom of the page as part of the technical test. As these are draft versions, these are temporary and will disappear after any change resets the test forms.

Mark this section as complete when:

You have made all the desired adoptions to the details available for change in this step, piloted the full survey with a local researcher or practitioner, and made any needed adjustments.

LOCALISATION: LISP

The local indicator selection process (LISP) is a vital part of the localisation of the HOLPA tool. It involves conducting a workshop with local farmers and stakeholders to identify a set of local indicators to include in the HOLPA tool that could be used to monitor the types of changes they want to see in their farms and landscapes. This section includes guidance on the workshop and options to incorporate the selected local indicators into the survey.

The local indicator selection process (LISP) workshop

The LISP workshop page provides some guidance and materials to support teams with planning the workshop, but the details of this will be specific to each team and location. There is a template provided to collect the details of the indicators identified by the workshop; this template will be used to add these local indicators on the following page.

The screenshot shows a table with two columns: 'name' and 'domain'. The 'name' column has rows for 'Example indicator 1' through 'Example indicator 4'. The 'domain' column has a dropdown menu open, showing options: 'Agricultural', 'Environmental', 'Economic', and 'Social'. Two red callout boxes provide instructions: one points to the 'name' column saying 'Type in the indicators selected in the workshop in the name column.' and the other points to the 'domain' dropdown saying 'Select the appropriate domain for the indicator from the dropdown list.'

	name	domain
1	Example indicator 1	Agricultural
2	Example indicator 2	Environmental
3	Example indicator 3	Economic
4	Example indicator 4	
5		
6		
7		
8		
9		
10		

Filling in the local indicator template.

Customise indicators

The customise indicators page allows you to incorporate the local indicators identified in your workshop into the customised HOLPA tool by uploading the local indicators, matching them where possible with available HOLPA indicators, and adding new custom indicators for any that remain.

When you go to the customise indicators page, you have four options. You will want to work left to right to start with, but you can return at any point and make changes in any of the sections.

The image shows four rectangular boxes arranged horizontally, each representing an option to incorporate local indicators. The first box is green and titled 'Upload local indicators'. The other three are light grey and titled 'Match with existing global indicators', 'Add custom survey questions', and 'Place custom questions in survey'.

Upload local indicators
Upload the local indicators you identified in the LISP workshop.

Match with existing global indicators
Browse the list of indicators already available in the HOLPA global survey, and match them to your identified local indicators.

Add custom survey questions
The local indicators that are not matched to a HOLPA global indicator should be reviewed. For each indicator, you can add one or more questions to the survey to allow you to calculate the indicator.

Place custom questions in survey
Once you have defined the questions to ask, you need to insert them into either the Household or Fieldwork survey.

Options to incorporate the local indicators.

UPLOAD LOCAL INDICATORS

This is where you upload the completed template containing the local indicators that were selected in the workshop.

The screenshot shows the 'Upload Local Indicators' page. At the top, there are four tabs: 'Upload local indicators' (highlighted in green), 'Match with existing global indicators', 'Add custom survey questions', and 'Place custom questions in survey'. A red callout box points to the 'Upload local indicators' tab with the text: 'Click on the option at the top of the page to view it.' Below the tabs, the 'UPLOAD LOCAL INDICATORS' section is active. It contains a text box for uploading a file, with a red callout box saying: 'Upload the completed indicator template here to add local indicators.' Below this is a table titled 'Local Indicators List' with an 'ADD LOCAL INDICATOR' button. A red callout box points to this button with the text: 'You can add indicators manually here.' The table currently shows 'NO LOCAL INDICATORS' and a 'Create a local indicator to get started.' link.

Filling in the local indicator template.

Drag and drop or click to select the file you want to upload, then click the upload button to confirm. Once you have uploaded a file, you will see the details, and have the option to delete it and upload a new file.

Alternatively, you can add the indicators manually by clicking the add local indicator button and entering the name and domain in the box.

The screenshot shows a modal form titled 'Create local indicator'. It has two main input fields: 'Name*' and 'Domain*'. The 'Name*' field is a text input with a red border and a lock icon. The 'Domain*' field is a dropdown menu with the text 'Select an option'. Below these fields are three buttons: 'CREATE' (red), 'CREATE & CREATE ANOTHER' (grey), and 'CANCEL' (grey). The background shows a list of indicators with columns for Name, Domain, and a checkbox.

Manually adding a local indicator.

MATCH WITH GLOBAL INDICATORS

This option allows you to browse through the list of core and optional indicators already present in the global HOLPA survey. If your indicators match up to the ones already available, you can add them easily by matching them here.

Looking for matches for local indicators from the list of global indicators included in HOLPA.

Click on an indicator on the left hand side. The available indicators within the corresponding theme will appear on the right. Read through and, if there is one that is the same as your indicator (or "close enough", depending on what your team and stakeholders may decide), then select that as a match. Do this for each of the indicators. There may not be suitable matching indicators for all of them; remaining indicators can be incorporated into the survey using the "Add custom survey questions" option.

ADD CUSTOM SURVEY QUESTIONS

Writing additional questions and adding them to the survey will likely make data collection more resource intensive and reduce the comparability of results, so consider each one you choose to add carefully as a compromise between local relevance and global comparability.

You will see the remaining unmatched indicators in a table. You have the option to either import questions in bulk using an XLSform, or manually add questions for each indicator.

If you add multiple questions for an indicator, you may want them to display in a particular order. On the left hand side of the table, there is a button to enable reordering, which lets you drag to rearrange the questions within an indicator.

The screenshot displays the 'ADD CUSTOM SURVEY QUESTIONS' interface. At the top, a green header reads 'ADD CUSTOM SURVEY QUESTIONS'. Below it, a paragraph explains that the following are local indicators not mapped to a global HOLPA indicator. A blue button labeled 'DOWNLOAD XLSFORM TEMPLATE' is present. A red callout box points to this button with the text: 'Download a template to write your own ODK form questions'. Below this is a section titled 'Import Questions from an ODK Xlsform (Excel)'. It includes a sub-section 'Import Questions' with instructions to upload a completed Xlsform file. A red callout box points to the 'Browse' link in the upload area with the text: 'Add questions by uploading the completed XLSform template here.' Below this is a section titled 'Add / Edit Questions Directly'. It shows two example indicators, 'EXAMPLE INDICATOR 2' and 'EXAMPLE INDICATOR 3'. For each indicator, there is a blue button labeled 'ENABLE REORDERING' and a red button labeled '+ ADD QUESTION'. A red callout box points to the 'ENABLE REORDERING' button for 'EXAMPLE INDICATOR 2' with the text: 'If you add multiple questions for an indicator, you can click here to adjust the order in which they will be shown.' Another red callout box points to the '+ ADD QUESTION' button for 'EXAMPLE INDICATOR 2' with the text: 'Add a question manually for this indicator.'

Options to view unmatched indicators and add custom questions to the survey forms.

Add questions using an xlsform template

If you are confident writing ODK forms in Excel, then importing questions will give you more flexibility (for example, with different question types). To import questions, click the "Download XLSform template" button, and fill in the template.

	A	B	C	D	E
1	indicator	type	name	label::English (en)	hint::English (en)
2	Example indicator 2	integer	trees_count	**Total number of trees observed**	Include all trees including those
3					
4					

Select the indicator for the question from the dropdown list, then complete the XLSform as normal.

Using the template to write your own ODK questions.

You will need to write your questions in a normal ODK XLSform format, and use the first column in the template to select which indicator each question is associated with. When you have completed the form, return to the same page to upload it, and you will see the newly added questions in the table below.

Add questions manually

You can add questions manually using the "Add question" button for each indicator in the list. Select the question type, and then fill in the fields as needed. When you save changes to the question, it will appear in the list.

The screenshot shows the 'ADD QUESTION' form with the following fields and callouts:

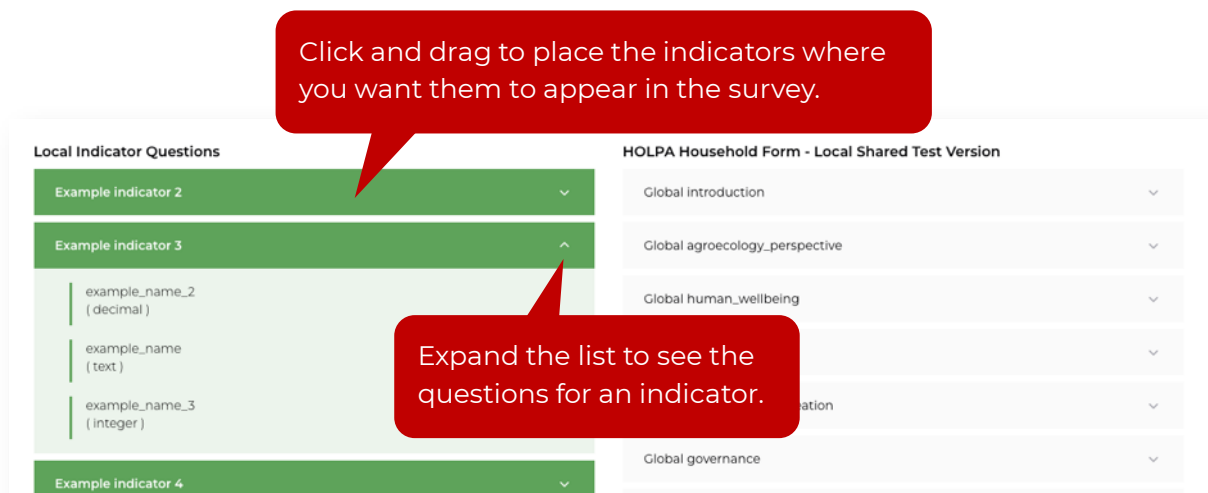
- Question Information**
 - Type***: A dropdown menu currently set to 'text'. A red callout box points to it with the text: "Select the question type. This may change the fields you need to complete - e.g. you may need to add multiple choice options."
 - Variable Name***: A text input field containing 'Example name'.
 - Label - English (Canada)***: A text input field containing 'This is the question text in english'.
 - Hint - English (Canada)***: A text input field containing 'Hint text'.
 - Label - French (Canada)***: A text input field containing 'Ceci est le texte de la question en français'.
 - Hint - French (Canada)***: A text input field containing 'texte d'indice'.
- Buttons**: 'CREATE' (blue) and 'CANCEL' (red) buttons at the bottom right.

A red callout box at the bottom points to the label and hint fields with the text: "You will need to add text for the question (and sometimes answer options) in each language for your survey."

Adding a custom question.

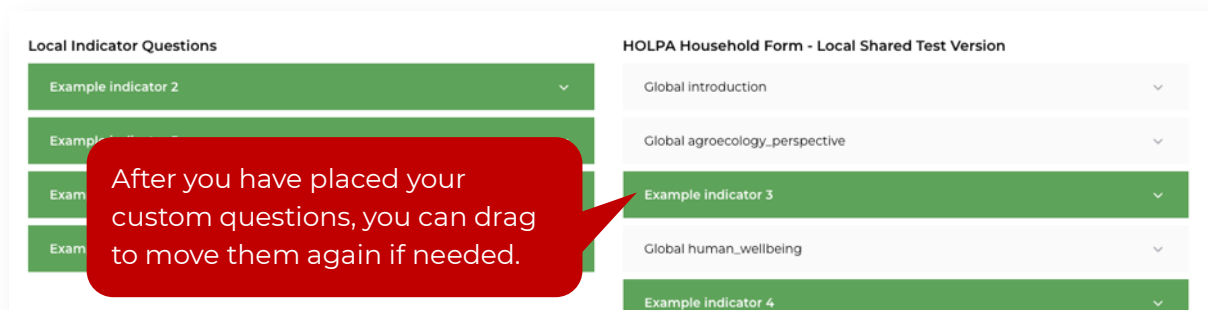
PLACE CUSTOM QUESTIONS IN SURVEY

This option allows you to indicate where in the survey the custom questions should be placed.



Placing the questions in the survey.

In the left column is a list of your local indicators; you can click to drop down to see the questions you have added for each one. On the right-hand side are all the modules of the Household and Fieldwork surveys. To place the questions, drag an indicator from the list on the left to the desired position in the list on the right.



In this example, question modules have been placed in the survey.

Mark this section as complete when

You have carried out the LISP workshop, agreed the local indicators for your survey, and used the matching and custom question options to add those indicators to your survey.

PILOT TEST AND ENUMERATOR TRAINING

This section is all in a single page and guides you through the process of conducting the full pilot test for your HOLPA survey.

[JUMP TO ACCESS FORMS](#)

Pilot test and enumerator training

Once you have completed the localisations and any changes to the survey and translations, it is time to conduct a full pilot and enumerator training. This step familiarises the enumerators with the survey, preparing them to use the questionnaires, and allows for quality control and testing of the survey with the people and context for which it will need to work in the live data collection.

The enumerator training includes three stages:

- 1. Survey review:** Enumerator training begins with an in-person workshop to go through each of the survey questions. The objective is for enumerators to understand the purpose of the survey and the information required by each question, to validate the functionality of the survey on their devices and to simulate survey implementation.
- 2. Piloting and feedback:** Enumerators then carry out a full pilot test with local farmers. The objective is to identify difficult or unclear questions and any technological errors in the digital survey. For piloting and data collection, enumerators will need an android device with ODK collect installed and set up. They can then use the QR code below to access the latest published version of the form. Take note of the titles of the forms in the app - ensure nobody is accidentally using an old version of the form, or the incomplete version used in the initial pilot test.
- 3. Quality control:** In this stage, the data collected during the pilot is reviewed for quality assurance, and issues can be identified. You can view a summary of submitted data and view each submission to conduct quality checks. This will help you identify frequent errors or omissions which may necessitate further enumerator training or adjustments to the form.


During the piloting and training, special attention should be paid to correct interpretation of questions related to social and environmental dimensions, which include perception questions and field work.

Once you have carried out the pilot and training, you will likely need to return to the platform to review the feedback and findings gleaned from the pilot. Ensure you use the "publish" button to update the forms.

Access forms

Your project team has been set up. To link your Android device, install and open **ODK Collect**. When asked for project details, scan the QR code on this page. Your device will be linked and you will have access to the forms listed below. When you make changes to the forms on the platform, they are not automatically updated on your device. This is so that you can make changes, test them as **DRAFT VERSIONS** and confirm they are working as intended before publishing them. The enumerator team will see.

If there are changes that can be published, you will see a 'PUBLISH' button in the table below. We highly recommend reviewing the forms before publishing them on the [Initial Pilot Page](#).



SCAN QR Code in ODK Collect

Forms and submissions

[SURVEY FORMS](#) [PILOT TEST SUBMISSIONS](#)

Title	Status	No. of Submissions in ODK Central	No. of Submissions in database	
HOLPA Household Form - Local Shared Test Version	✓ LIVE	3	0	PUBLISH CHANGES MANUAL
HOLPA Fieldwork Form - Local Shared Test Version	✓ LIVE	2	0	PUBLISH CHANGES MANUAL

Showing 1 to 2 of 2 results

Begin Live Data Collection

When you have completed the pilot test and are ready to begin live data collection, click the button below. This will disable this page and mark all future submissions as "live" data.

[SWITCH TO LIVE DATA COLLECTION](#)

Open the ODK Collect app and scan this QR code to access the forms.

Click to the submissions tab to view submitted form

If you have unpublished changes, the option to publish them will appear

Click here to confirm that the pilot is complete and you are ready to commence live data collection.

The main pilot page.

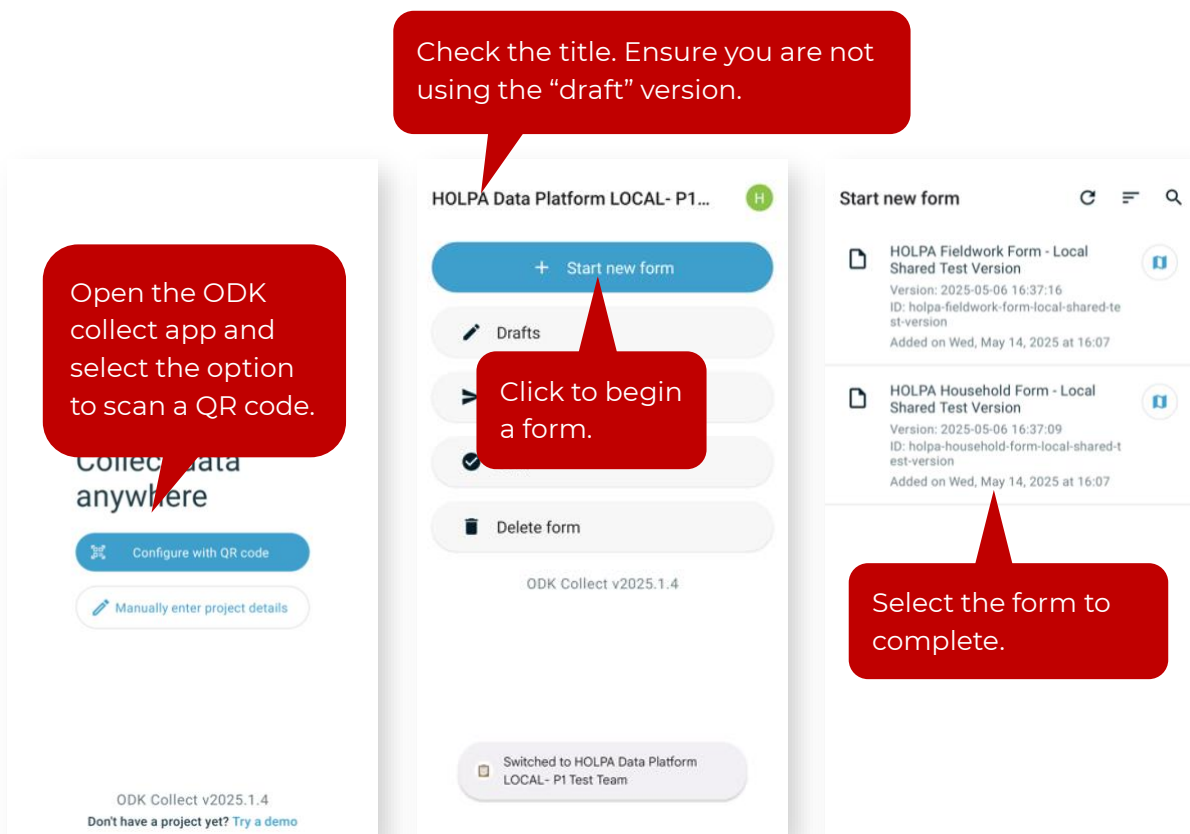
Before you conduct the pilot, ensure you have:

- Made your intended changes and customisations using the previous steps on the dashboard.
- As needed, used the initial pilot draft versions of the form to check any additional changes, such as the addition of custom questions for your local indicators following the LISP workshop.
- Published all changes to update the forms you will use in the pilot.
(This must be done manually; this is so that you can make changes and test them as draft versions to confirm they are working as expected before updating the versions that your enumerator team will see.)

When you are ready for the pilot, you will need to organise the workshop as described in this page. There are some instructions for the workshop on this page, as well as in the HOLPA Guidance.

ACCESS FORMS

The "Access forms" section contains the QR codes to set up the forms on the mobile devices that will be used to pilot data collection. On all devices that will be used for data collection, open ODK Collect and scan the QR code.



Setting up the real forms for the full pilot.



Note that the forms used for the pilot are **not the same** as the draft versions used in the initial pilot. Those draft forms should never be used for this pilot or for live data collection, as the data submitted for those forms is not saved.

Ensure that everyone is using the correct version of the forms before proceeding with the pilot or any data collection.

FORMS AND SUBMISSIONS

In the "Forms and submissions" section, you can see an overview of the current forms and view the submissions.

You can check whether there are unpublished changes to your forms and have the option to publish changes to the survey here.

The survey submissions view shows you all the submissions for your forms. If new submissions have not yet appeared on the page, you can use the "manually get submissions" option on the survey forms view to prompt this to refresh. You can view individual submissions to conduct quality checks. This will help you identify frequent errors or omissions which may necessitate further enumerator training or adjustments to the form.

When you have completed the pilot, you will likely then need to return to previous sections to make additional edits to the survey. Revisit any section from the dashboard as needed. You may choose to carry out further pilots or technical tests before commencing live data collection. Remember to return to the survey forms view and publish changes again if you make changes to your form.

Mark this section as complete when:

You have conducted the pilot and training workshop and are satisfied that the required adjustments have been made.

DATA COLLECTION

Once you have tested and finalised the details of your localised HOLPA survey, data collection may begin.

Set up the survey

This page prompts you to check that you are ready to commence live data collection, and displays the QR code to set up devices for enumerators.

SET UP LIVE FORMS FOR DATA COLLECTION

Up until this point, all the forms used for pilot testing have been labelled as "test" forms, and the submissions are stored as test data, not to be included in the results. To begin actual data collection, you need to use the "Set up live forms for data collection" section to set your survey to "live". There are some notes in this section to prompt you to double check all the necessary tasks have been completed. Read through these, and when you are ready, click the button to make your survey live.

The set up survey page while the forms are set to pilot testing mode.

ACCESS LIVE FORMS

Once your survey is live, you will be able to use a QR code to set up new devices with the correct forms, using the same process as in the previous section.

Enumerators who have already joined the project using the QR code at the pilot phase can alternatively **sync their devices to receive the updated forms.**

Before enumerators commence data collection, they should double check that the forms on their ODK Collect app are indeed the live versions; test versions will be labelled as such in the form title, e.g. "HOLPA Household Form - Local Shared Test Version". Reminder: under no circumstances should enumerators use the draft versions of the survey forms accessed from the initial pilot section. The data from these is not saved and will be lost.

Access live forms

To link your Android device, install and open **ODK Collect**. When asked for project details, your device will be linked and you will have access to the forms listed below. Enumerators scanning the QR code at the pilot phase will automatically receive the latest live forms. Once enumerators begin data collection, you will be able to see form submissions.

QR code to set up data collection devices.



SCAN QR Code in ODK Collect

Your survey is live

Your team's survey is currently set to **live data collection**. To switch back to testing mode, click the button below. If you do this, remember to return to this page and switch back again before resuming data collection.

RETURN TO PILOT TESTING MODE

Switch back to testing mode if needed.

Forms overview

Title	Status	No. of Submissions in ODK Central	No. of Submissions in database	
HOLPA Household Form - Local Shared Test Version	✓ LIVE	3	3	MANUALLY GET SUBMISSIONS
HOLPA Fieldwork Form - Local Shared Test Version	✓ LIVE	2	2	MANUALLY GET SUBMISSIONS
Showing 1 to 2 of 2 results		Per page	10	▼

The set up survey page once your survey is in live data collection mode.

FORMS OVERVIEW

At the bottom of the page, you can see the titles and published status of your forms. As in the pilot test section, there are options here to publish changes if this still needs to be done before commencing data collection.

Monitor data collection

Once enumeration has commenced, this page lets you see incoming data. You can track progress and review submissions for quality assurance purposes.

At the top of the page, you will see a general summary of the data that has been collected; this includes the number of submissions for each form and number of farms surveyed. Beneath that, you can browse the submissions. Use the tabs to view submissions by locations at different levels, or to simply view all of them.

The screenshot shows the 'Monitor data collection' interface. At the top, there are two summary boxes: 'Data Collected' and 'Summary'. A red callout points to the 'Data Collected' box, stating 'A brief summary of data collected.' Below these is a 'Download raw data' section with a blue download icon and a 'DOWNLOAD.CSV' button. A red callout points to the 'DOWNLOAD.CSV' button, stating 'Download raw response data.' Below this is the 'Submissions By Location' section, which includes a tabbed interface with 'DISTRICTS', 'SUB-DISTRICTS', 'VILLAGES', 'FARMS', and 'SUBMISSIONS'. A red callout points to the 'DISTRICTS' tab, stating 'Show submissions by location at different levels.' Below the tabs is a table showing submission data for two districts.

Districts			
Location	Farm Counts		All Complete
	Total	Household Complete	
District One	8	0	0
District Two	8	0	0

Showing 1 to 2 of 2 results

Per page 10

The monitor data collection page.

There is also an option to download the raw data from submissions. Note that this will be unprocessed and will not include calculated indicators; to obtain survey data ready for analysis, use the "data analysis" section.

If you find you need to correct an error in the data, you can directly edit a submission. This should be used sparingly, only where it has been confirmed with an enumerator that something was inputted incorrectly.

Mark this section as complete when:

Data collection has been carried out and concluded.

DATA ANALYSIS

In this section, you can download the dataset for your survey. The download will include all the data from the live data collection, some calculated agroecology and performance indicators, and a data dictionary.

From here, your team can conduct whatever data analysis is needed, and organise storing and sharing of the data as required.

Survey Dashboard > Data Analysis

INSTRUCTIONS


Data Analysis

Download data for analysis

Here, you can download the complete dataset for your survey. The download will be an .xlsx file containing:

- All the data from the live data collection.
- Agroecology and performance indicators, automatically calculated at farm level.
- A detailed data dictionary to help you navigate through the data.

Once you have downloaded the data, you can conduct data analysis as required, and it is up to your team or organisation to manage storage and sharing of the dataset as appropriate. Download the complete dataset from your survey. This export includes the agro-ecology and performance indicators, automatically calculated at farm-level, along with a detailed data dictionary to help you navigate through the data.



SURVEY DATASET

Download the complete dataset from your survey. This export includes calculated agro-ecology and performance indicators and a detailed data dictionary.

DOWNLOAD .XLSX

Click here to start the download.

Download the data for analysis.