



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 screenshot displays the HOLPA Survey Dashboard interface. At the top, there is a navigation bar with links for 'Survey Dashboard', 'Admin Panel', 'My Team', and 'Edit Profile'. A green banner at the top features the text 'HOLPA Survey Dashboard' over a background image of rolling green hills. Below the banner, a 'Shortcut: test or preview survey' section includes a link to 'Jump to the "initial pilot" page to access a draft version of your survey questionnaires.' and a 'PREVIEW' button. The main content area is organized into a grid of nine cards, each representing a task:

- Prepare survey**: Status: IN PROGRESS. Includes a 'VIEW AND UPDATE' button.
- Survey Country and Languages**: Status: IN PROGRESS. Includes a 'VIEW AND UPDATE' button.
- Sampling**: Status: NOT STARTED. Includes a 'VIEW AND UPDATE' button.
- Survey Locations**: Status: NOT STARTED. Includes a 'VIEW AND UPDATE' button.
- Localisation**: Status: IN PROGRESS. Includes a 'VIEW AND UPDATE' button.
- Place-based adaptations**: Status: IN PROGRESS. Includes a 'VIEW AND UPDATE' button.
- Localisation: LISP**: Status: NOT STARTED. Includes a 'VIEW AND UPDATE' button.
- Localisation: Pilot**: Status: NOT STARTED. Includes a 'VIEW AND UPDATE' button.
- Data Collection**: Status: NOT STARTED. Includes a 'VIEW AND UPDATE' button.
- Monitor data collection**: Status: NOT STARTED. Includes a 'VIEW AND UPDATE' button.
- Datasets**: Status: NOT STARTED. Includes a 'VIEW DATA' button.
- Download data**: Status: NOT STARTED. Includes a 'VIEW DATA' button.

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.

The screenshot shows a web application interface for managing survey languages. At the top, there is a navigation bar with links for Survey Dashboard, Admin Panel, My Team, and Edit Profile. On the far right, there is a user profile icon. Below the navigation, the page title is "Survey Languages". A breadcrumb trail indicates the current location: Survey Dashboard > Survey Languages. To the right of the title, a red callout box points to a green button labeled "INSTRUCTIONS". The main content area has two sections: "Select Country and Languages" and "Survey Translations". Each section contains descriptive text and an "UPDATE" button. A large red callout box points to the "UPDATE" button in the "Survey Translations" section, stating: "This footer bar allows you to update the completion status of a section." At the bottom of the page, there is a black footer bar with "GO BACK" and "MARK AS COMPLETE" buttons.

Each section page has instructions.

This is an action. Each section usually has multiple actions.

Select Country and Languages

Survey Translations

GO BACK MARK AS COMPLETE

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

Instructions

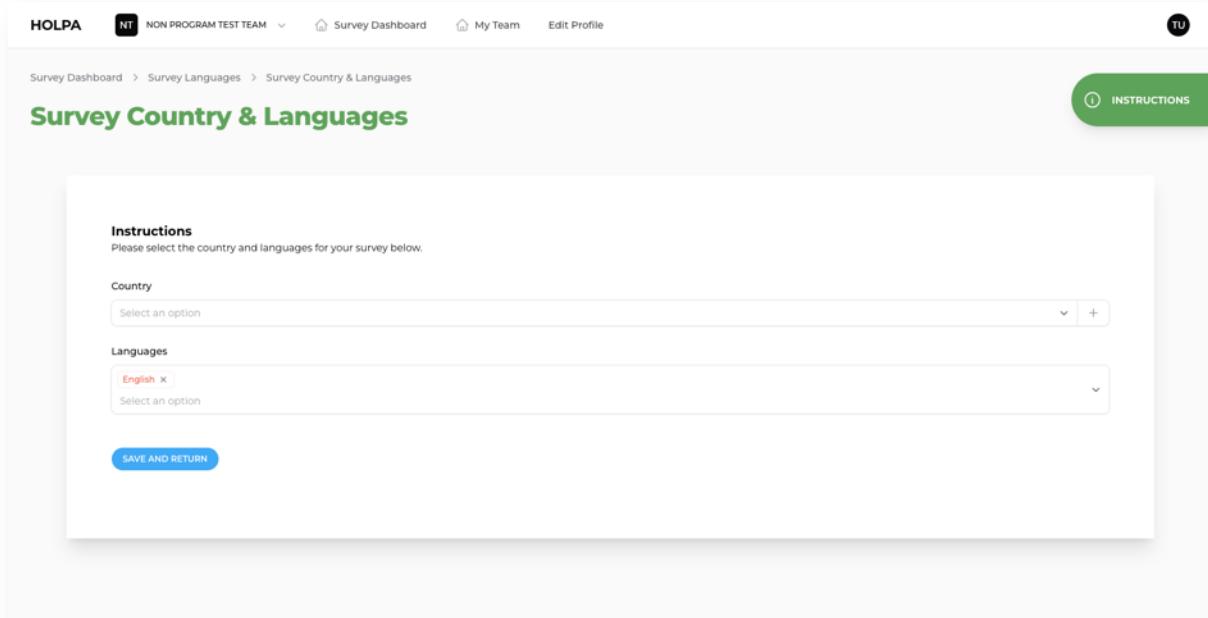
Each section page and action page has an instructions button, which you can click to show guidance for the page you are looking at.



INSTRUCTIONS

Actions

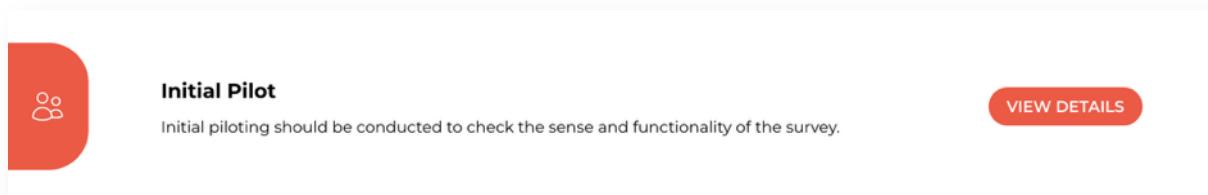
Within each section, there are usually multiple actions. Most actions will have options and prompts for you to add information or adjust elements of your survey. For example:



The screenshot shows the 'Survey Country & Languages' page. At the top, there are navigation links: HOLPA, NT NON PROGRAM TEST TEAM, Survey Dashboard, My Team, and Edit Profile. On the right, there is a green 'INSTRUCTIONS' button with a small info icon. The main content area has a heading 'Survey Country & Languages'. Below it, there is a section titled 'Instructions' with the sub-instruction: 'Please select the country and languages for your survey below.' There are two dropdown menus: 'Country' (labeled 'Select an option') and 'Languages' (containing 'English' with a red 'X' and 'Select an option'). At the bottom is a blue 'SAVE AND RETURN' button.

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:

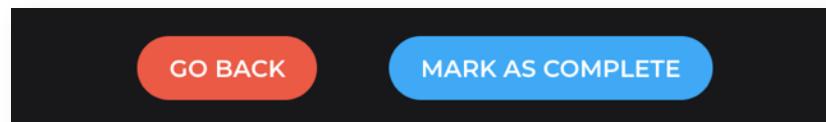


The screenshot shows the 'Initial Pilot' section page. It features an orange rounded rectangle icon with a white user icon. The title 'Initial Pilot' is displayed in bold black text. Below the title is a description: 'Initial piloting should be conducted to check the sense and functionality of the survey.' To the right is a red 'VIEW DETAILS' button with white text.

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.

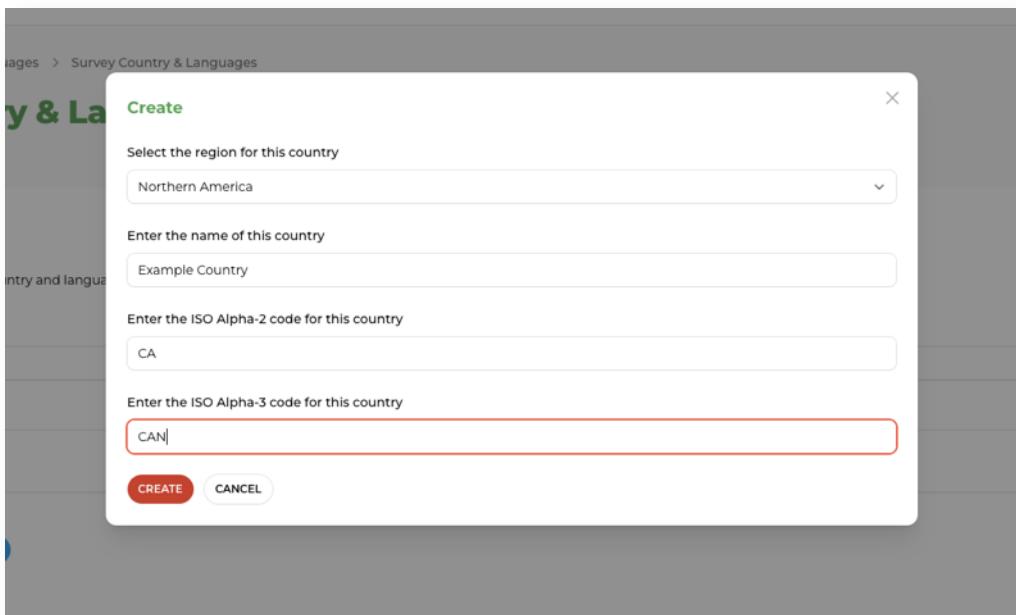
Survey country and languages

The screenshot shows the 'Survey Country & Languages' section page. At the top, there's a breadcrumb navigation: Survey Dashboard > Survey Languages > Survey Country & Languages. On the right, there's a green 'INSTRUCTIONS' button. The main area has two input fields: 'Country' and 'Languages'. The 'Country' field contains 'English' with a delete icon and a dropdown arrow. The 'Languages' field contains 'English' with a delete icon and a dropdown arrow. Below these fields is a red speech bubble containing the text: 'Type or select from the dropdown menu to add the country.' A red arrow points from this bubble to the 'Country' field. Another red speech bubble contains the text: 'Type in this box to search and add languages.' A red arrow points from this bubble to the 'Languages' field. A third red speech bubble contains the text: 'Use this button to add a country.' A red arrow points from this bubble to the '+' button in the 'Languages' field's dropdown menu. At the bottom left is a blue 'SAVE AND RETURN' button.

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.



Creating a new country.

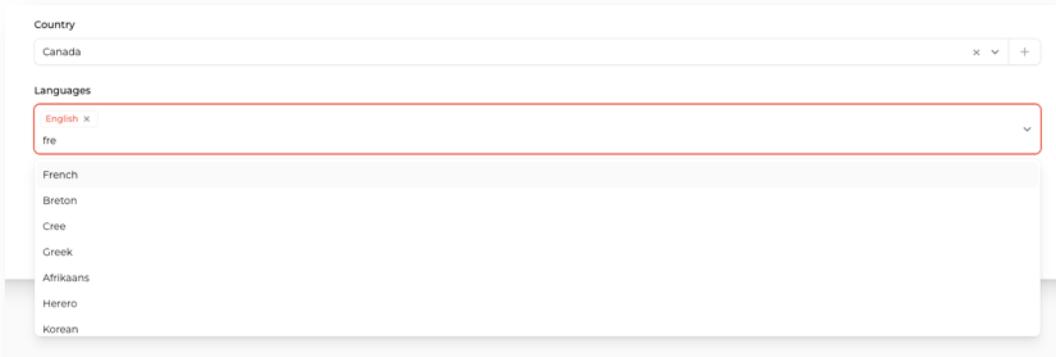
When you click to add a new country, a menu will appear. You will need to input the region, a name for the country, and the ISO Alpha-2 and Alpha-3 codes. You can use this online resource to find the codes: <https://www.iso.org/obp/ui>

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.



Selecting languages from the menu.

Survey translations

The screenshot shows the 'Survey Languages' section of the survey dashboard. It lists two languages: English (EN) and French (FR). For English, the 'Selected Translation' is 'English (Default)'. For French, it is 'None'. Each language row has a 'SELECT TRANSLATION' dropdown arrow. A red callout bubble points to the English row with the text: 'Click to expand or collapse the list of 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.

The screenshot shows an expanded view of available translations for English. It displays a table with columns for 'Available Translations' and 'Status'. One row is shown for 'ENGLISH (DEFAULT)', which is marked as 'Ready for use' and has a 'SELECTED' status indicator. A red callout bubble points to this row with the text: 'Add a new translation.' Another red callout bubble points to the 'VIEW / EDIT TRANSLATION' button in the same row. Below this, there is another language row for French (FR) with 'None' selected, and a red callout bubble points to this row with the text: 'Edit or duplicate an existing translation.'

Expanded view of available translations for English.

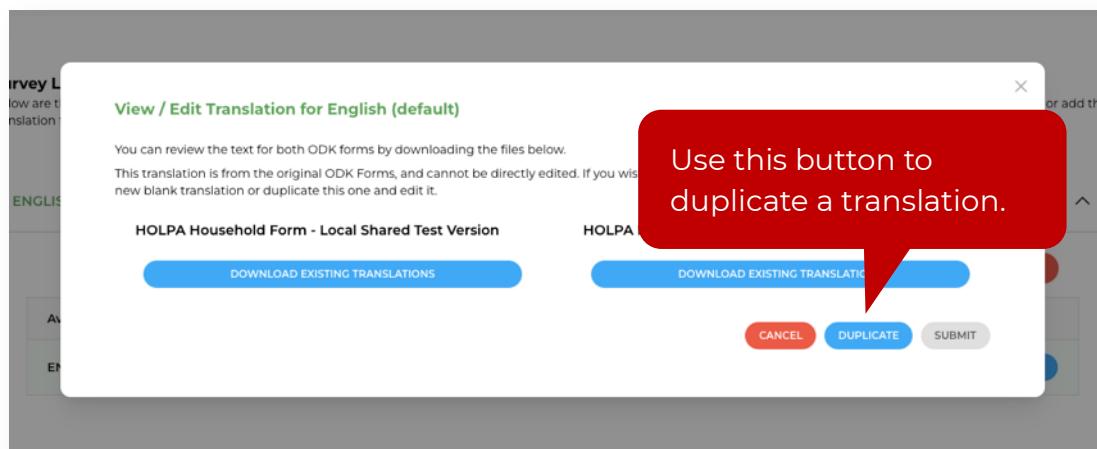
From this view, you can:

- 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.

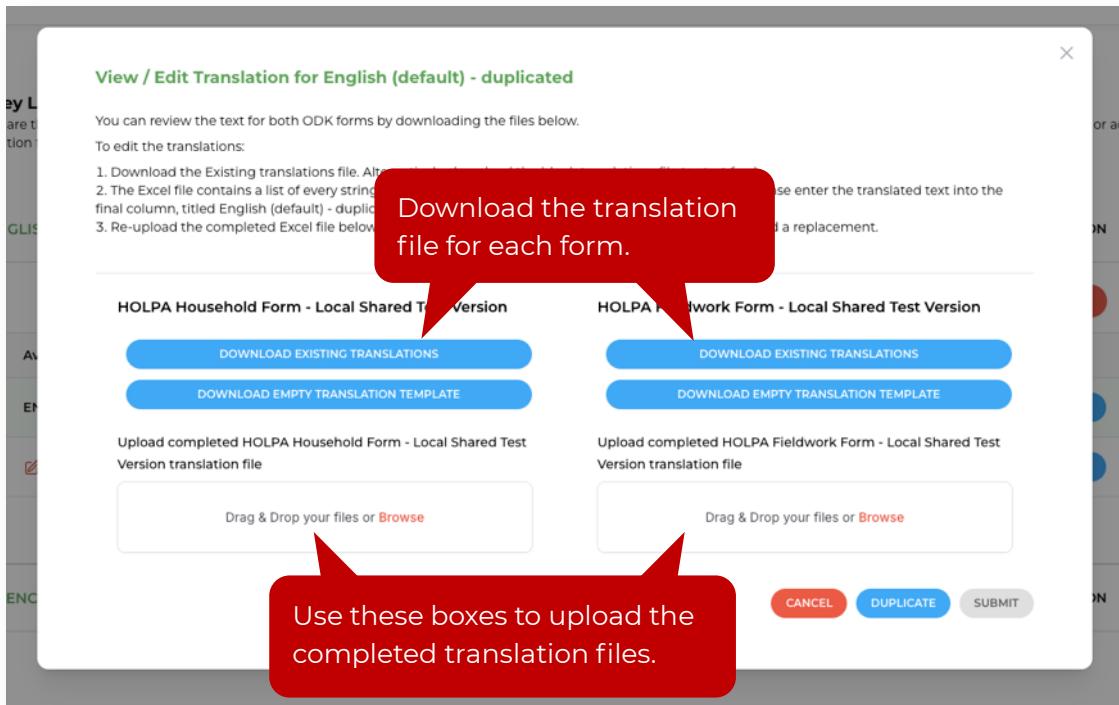
Click the duplicate button, and you will see the new translation appear in the table. By default, the new translation will be called “*Original translation name – duplicated*”. To rename it, click on the name in the table view, and a box will appear to allow you to input and save a new name.

Available Translations		Status	SELECT	TRANSLATION
ENGLISH (DEFAULT)		Ready for use	<input checked="" type="checkbox"/> SELECTED	VIEW / EDIT TRANSLATION
ENGLISH (DEFAULT) - DUPLICATED		Not uploaded	SELECT	VIEW / EDIT TRANSLATION

A red callout bubble points to the "ENGLISH (DEFAULT) - DUPLICATED" row in the table, with the text "Click the translation name to edit it."

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.



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** Please select language you are using to complete this survey	**1. Context** Please select language you are using to complete this survey
3	language	label	***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.
4	language	hint	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."
5	time_frame	label	Gets the defined time period for many questions (default 'last 12 months')	
6	location_note	label	Please select the correct location using the following questions	
7	location_note	hint		
8	district_id	label		
9	new_district	label		
10	sub_district_id	label		

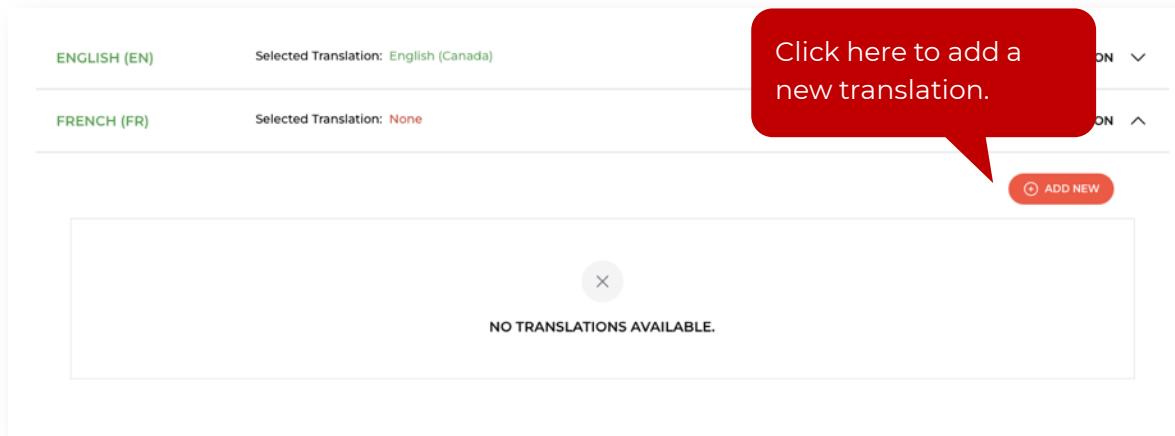
Make changes in this column only.

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.

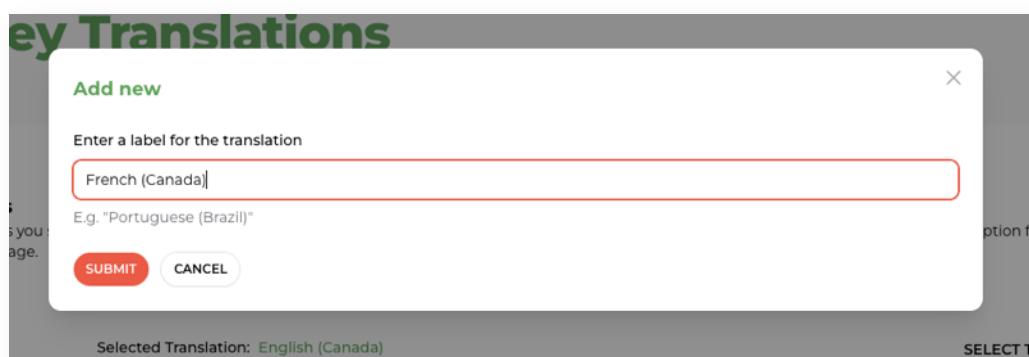
Add a new translation

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

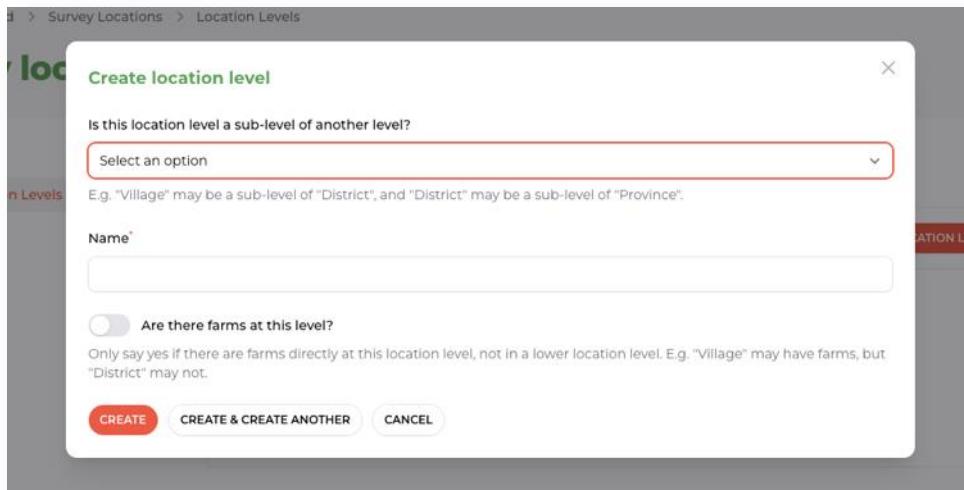
The system by which geographic locations are organised and denoted will vary between places (some countries are organised into counties and towns, some have provinces and districts), so you will need to first input the details of the hierarchy, and then fill in the specific locations for your survey.

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 screenshot shows the 'Survey Locations' section of the HOLPA platform. At the top, there's a breadcrumb navigation: Survey Dashboard > Survey Locations > Location Levels. On the left, there's a sidebar with 'Survey locations' and a 'Location Levels' tab. The main area has a table with one row labeled 'Farms'. In the top right corner of the main area, there's a green button labeled 'INSTRUCTIONS'. A large red callout bubble with white text 'Click here to add a location level.' points to a red button labeled 'NEW LOCATION LEVEL' in the bottom right corner of the main area. Below the table, a message reads 'NO LOCATION LEVELS' with a small 'X' icon, followed by the sub-instruction 'Create a location level to get started.'

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

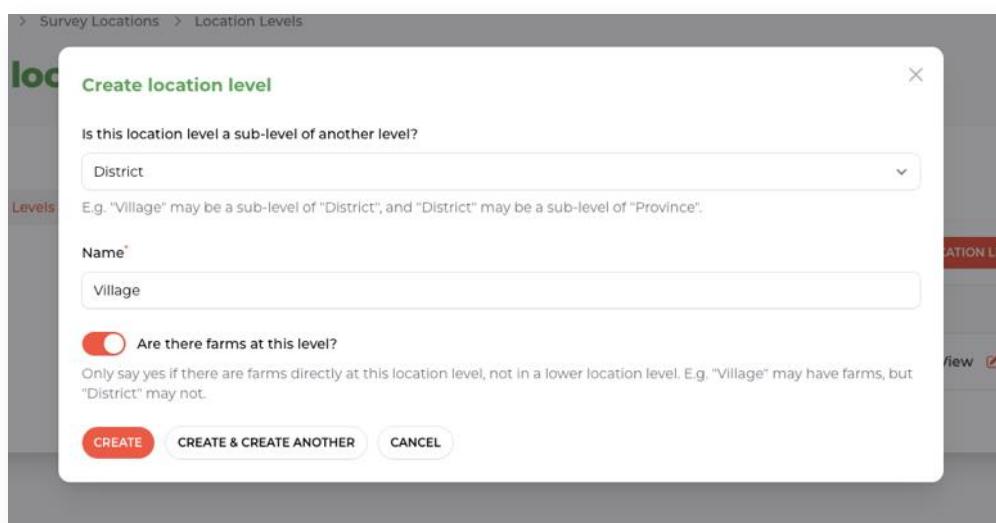
On the location levels page, you first need to add the names of the different levels. To do this, click on "new location level". A menu will appear.



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.



Adding "Village" as a location level below district.

Survey locations

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

Location Levels				
	Name	Parent	No. of Entries	Has farms
districts	district	Top Level	2	✗ View ✎ EDIT
sub-districts	sub-district	district	4	✗ View ✎ EDIT
villages	village	sub-district	8	✓ View ✎ EDIT
Farms				

NEW LOCATION LEVEL

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 locations

List of Districts

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

IMPORT DISTRICTS

Location Levels	Key Details
Districts	Level
Sub-districts	District
Villages	Parent Level
Farms	

Add locations manually one at a time.

ADD NEW DISTRICT

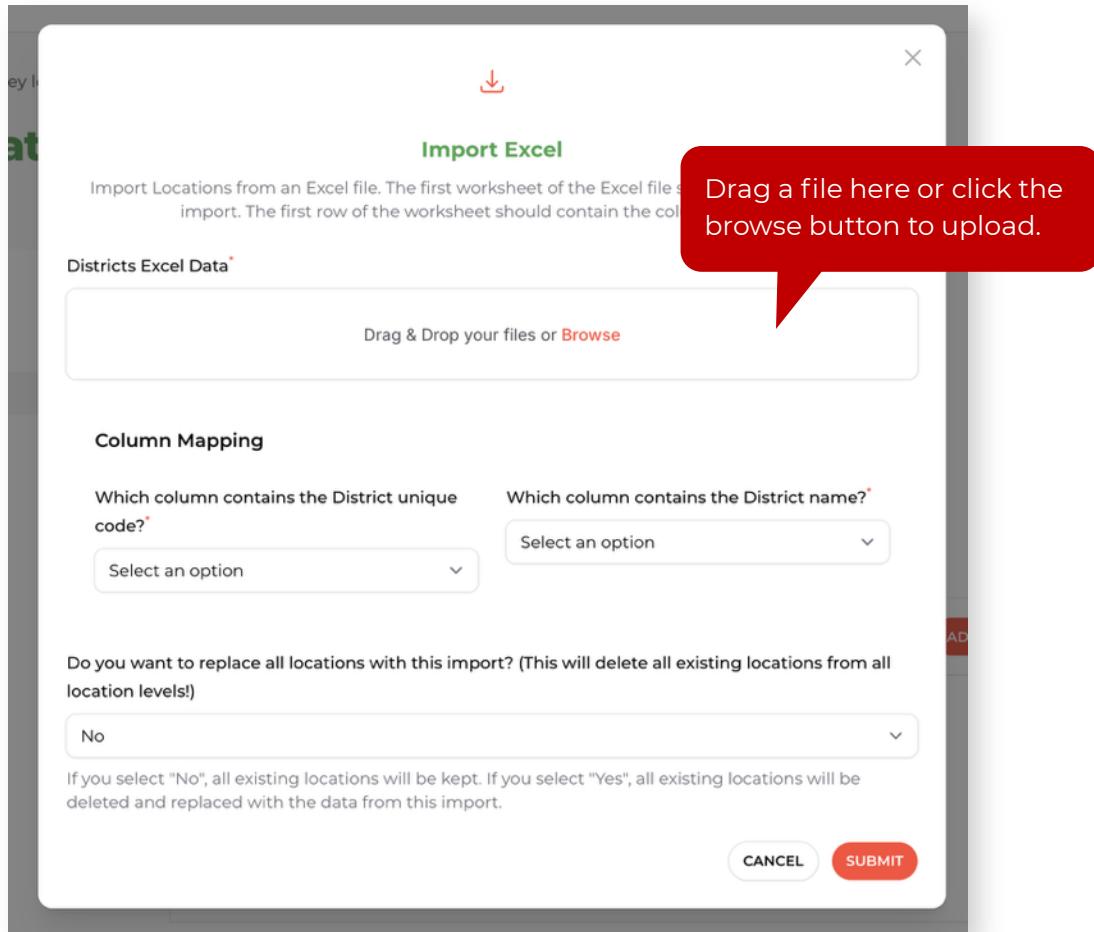
District List

NO LOCATIONS
Create a location to get started.

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.



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.

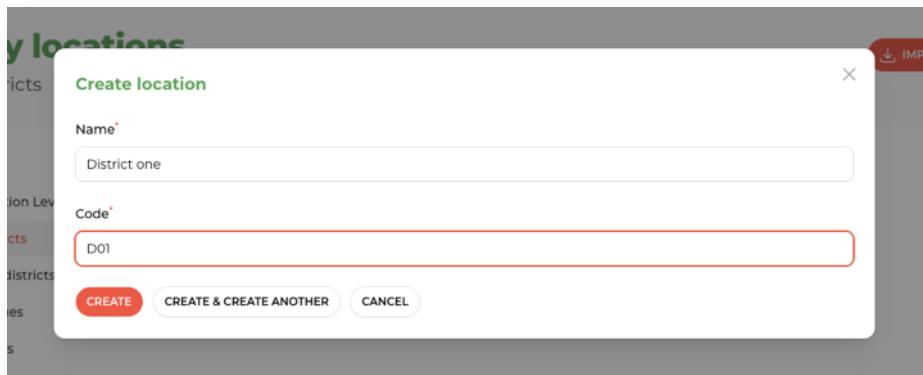
	A	B	C	D	
1	ID	Village name	District	District ID	
2	V01	Village 1	District 1	D01	
3	V02	Village 2	District 1	D01	
4	V03	Village 3	District 2	D02	
5	V04	Village 4	District 2	D02	
6					

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.

The screenshot shows the 'Survey locations' page with a sidebar for 'Location Levels' (districts, sub-districts, villages, Farms). A red callout box points to the 'IMPORT FARM LIST' button at the top right, with the text: 'Bulk add a list of locations by importing information from a spreadsheet file.' Another red callout box points to the 'NEW FARM' button in the top right of the main table area, with the text: 'Add locations manually one at a time.'

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.

The screenshot shows a modal dialog titled "Import Excel". At the top, there is a red download icon and a close button (X). Below the title, a green text area provides instructions: "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." A green button labeled "Farms Excel Data*" contains the file "TestFarmImport.xlsx" (15 KB) and an "Upload complete" message with a "tap to undo" link. A note below says: "Please make sure your data is in the first worksheet of the Excel file, and that the first row contains the column headers." The "Location" section asks "Which location level are the farms linked to?" with a dropdown menu set to "village". A note explains: "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)." The "Farm Information" section asks "Which column contains the farm unique code?" with a dropdown menu set to "farm_id". A note says: "e.g. farm_id or farm_code". A final question at the bottom asks "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 modal window titled "Create farm". At the top left is a dropdown menu labeled "Select the village for this farm" with the placeholder "Select an option". To its right is a text input field with the placeholder "Please enter a unique code to identify this farm for your team". Below these fields is a section titled "Personally Identifiable information" with a descriptive note: "This section lets you add any information about the farm or farmer that lets your enumerators personally identify the farm / farmer." It includes a table with columns "Identifiers", "Key", and "Value", and an "ADD ROW" button. Another table for "Properties" follows, with a similar structure. A note below the tables states: "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." On the right side of the modal, there are several rows of "EDIT" buttons, each next to a small red icon. At the bottom right of the modal is a "NEW FARM" button.

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".

The screenshot shows a user interface for survey testing. At the top, there's a breadcrumb navigation: Survey Dashboard > Place Adaptations > Time Frame. On the right, there's a green button labeled 'INSTRUCTIONS' with a help icon. The main area has a title 'Survey Testing - Adapt Time Frame'. Below the title, there's a note: 'In the HOLPA Household Survey, there are questions to ask about a specific time frame. By default, this time frame is "In the last 12 months". However, that is not suitable for all situations. For your survey, it might make more sense to ask the questions about "last season" or "last year". Below is the complete list of questions automatically saved and the question text will be updated in the text box below. Your entry will be automatically saved and the question text in your survey form will be updated.' A large red speech bubble contains the text 'Type the desired time frame here.' Below this, a text input field is highlighted with a red border, containing the placeholder 'last season'. To the right of the input field, another red speech bubble says 'You can preview the affected questions here to check the phrasing.' On the left, there's a table with columns 'Name' and 'Question Text', showing rows for 'primary_occupation', 'additional_occupation', 'training_note', and 'knowledge_note'.

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.

The screenshot shows a user interface for managing survey modules. At the top, there is a dropdown menu labeled "Diet diversity module version" with the placeholder "Select an option". Below this, a note states: "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." A table follows, with columns for "Question Type", "Name", "Label (en)", and "Hint (en)". Two rows are visible: one for "begin_group" named "diet_quality" with the label "**16. Diet quality**" and another for "begin_group" named "diet_diversity" with the label "Dietary Diversity". At the bottom of the table, there is a note: "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."

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

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.

Cont

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.

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.

Adding a choice list entry.

Pilot test

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.

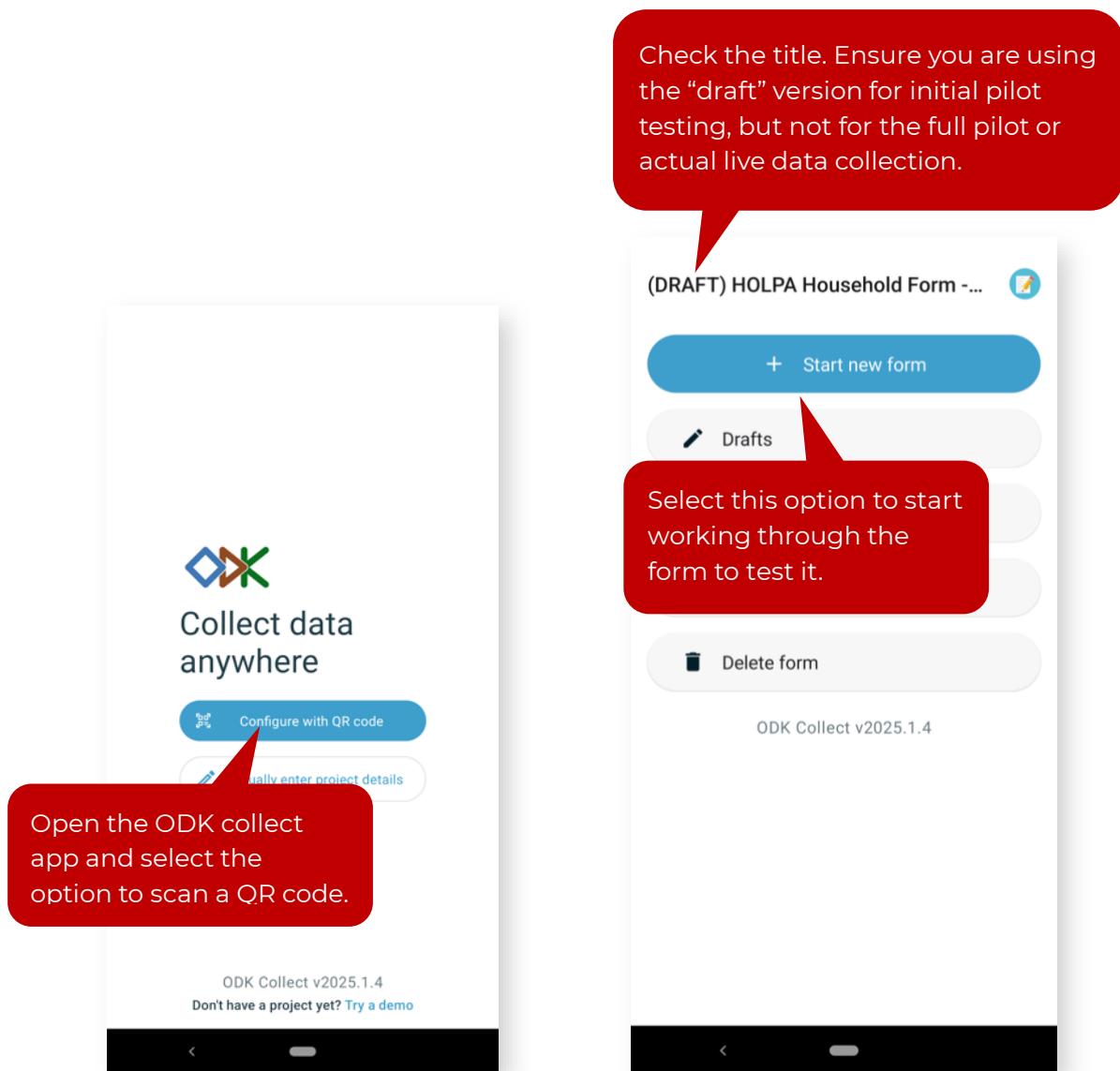
The screenshot shows the 'Survey Testing - Initial Pilot' page. At the top, there's a navigation bar with 'HOLPA', 'PI TEST TEAM', 'Survey Dashboard', 'My Team', 'Edit Profile', and a 'TA' button. Below the navigation, the breadcrumb path is 'Survey Dashboard > Place Adaptations > Initial Pilot'. A green 'INSTRUCTIONS' button is on the right. The main content area has a section titled 'Testing the surveys'. It includes a list of steps for conducting the pilot test, such as using QR codes to access draft versions of the survey in ODK Collect. A red callout bubble points to the QR codes for the 'HOLPA Household Form - Local Shared Test Version' and 'HOLPA Fieldwork Form - Local Shared Test Version'. The text in the callout bubble reads: 'Scan the QR cards in ODK Collect to test the forms.'

Initial pilot page.

The initial pilot page contains more detailed guidance on this process, and this is where you can find the QR code to scan to start testing the survey using ODK Collect.

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

Check the title. Ensure you are using the “draft” version for initial pilot testing, but not for the full pilot or actual live data collection.

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.

	A	B
1	name	
2	Example indicator 1	
3	Example indicator 2	
4	Example indicator 3	
5	Example indicator 4	
6		
7		
8		
9		
10		

Type in the indicators selected in the workshop in the name column.

Select the appropriate domain for the indicator from the dropdown list.

A dropdown menu showing the available domains: Agricultural, Environmental, Economic, and Social. The Agricultural option is currently selected.

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.

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.

Upload local indicators
Match with existing global indicators
Add custom survey questions
Place custom questions in survey

Click on the option at the top of the page to view it.

Upload the completed indicator template here to add local indicators.

You can add indicators manually here.

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.

Create local indicator

Name*: Indicator 1

Domain*: Select an option

CREATE CREATE & CREATE ANOTHER CANCEL

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.

Local indicators
Select an indicator to start looking for matches.

✓ MATCHED
Example indicator 1

Example indicator 2

Example indicator 3

Example indicator 8

RESET

Global indicators
Browse the available indicators in the global survey to search for a match for the selected local indicator.

Indicator	Action
Crop health	SELECT MATCH
Animal health	SELECT MATCH
Soil organic carbon (alternative: qualitative measure of soil health)	SELECT MATCH
Nutrient use	REMOVE MATCH
Soil health	SELECT MATCH
Nutrient use efficiency	SELECT MATCH
Nu	SELECT MATCH

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 shows the 'Add Custom Survey Questions' page. It includes three main sections:

- Download a template to write your own ODK form questions:** A red callout points to a blue button labeled 'DOWNLOAD XLSFORM TEMPLATE' and a text area for writing questions.
- Add questions by uploading the completed XLSform template here:** A red callout points to a file upload input field labeled 'Drag & Drop your files or Browse'.
- If you add multiple questions for an indicator, you can click here to adjust the order in which they will be shown:** A red callout points to a blue 'ENABLE REORDERING' button located next to an indicator section header.

Below these sections, there are two examples of indicator tables:

- EXAMPLE INDICATOR 2:** Shows a table with columns for 'Question' and 'Type'. It includes a 'HIDE QUESTIONS' button and a '+ ADD QUESTION' button.
- EXAMPLE INDICATOR 3:** Shows a table with columns for 'Question' and 'Type'. It includes a 'HIDE QUESTIONS' button and a '+ ADD QUESTION' button.

A large red callout at the bottom states: *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, them 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 thos
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.

Select the question type. This may change the fields you need to complete - e.g. you may need to add multiple choice options.

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.

Click and drag to place the indicators where you want them to appear in the survey.

Expand the list to see the questions for an indicator.

Local Indicator Questions	HOLPA Household Form - Local Shared Test Version
Example indicator 2	Global introduction
Example indicator 3	Global agroecology_perspective
example_name_2 (decimal)	Global human_wellbeing
example_name (text)	Global environment
example_name_3 (integer)	Global governance
Example indicator 4	

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.

After you have placed your custom questions, you can drag to move them again if needed.

Local Indicator Questions	HOLPA Household Form - Local Shared Test Version
Example indicator 2	Global introduction
Example indicator 3	Global agroecology_perspective
Example indicator 4	Example indicator 3
	Global human_wellbeing
	Global environment
	Global governance

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:

- 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.
- 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.
- 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 feedback and findings gleaned from the pilot. Ensure you use the "pilot page" to do so.

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



SCAN QR Code in ODK Collect

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 expected before your enumerator team will see them.

If there are changes that can be published, they will appear here. We highly recommend reviewing the changes and publishing them on the [Initial Pilot Page](#).

Click to the submissions tab to view submitted form

Forms and submissions

Title	Status	No. of Submissions in ODK Central	No. of Submissions in database	PUBLISH CHANGES	MANUAL
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

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.

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](#)

The main pilot page.

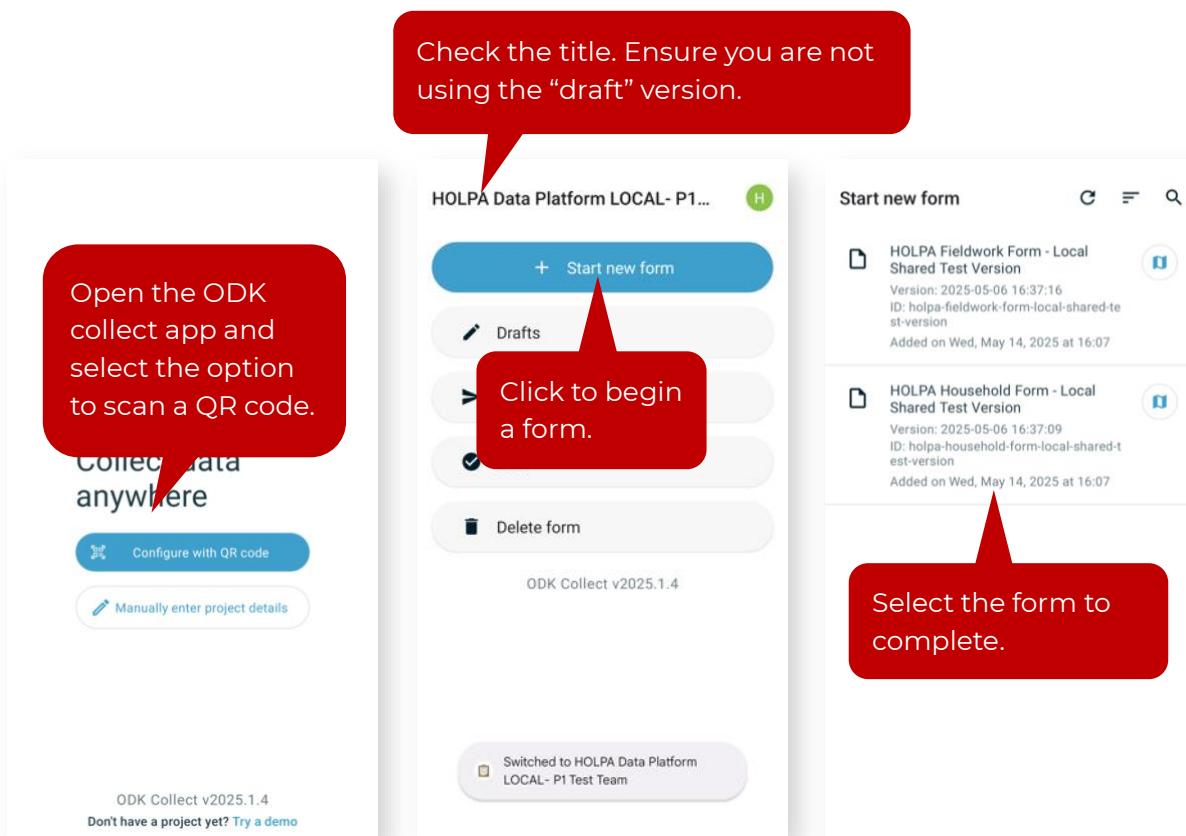
Before you conduct the pilot, ensure you have:

- 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.

Set up live forms for data collection

Your team is currently in **pilot testing mode**. To switch to live data collection, please confirm:

- All the required changes to the survey have been made and published.
One or more of your forms has changes that have not been published. This may be due to continuing. [Click here](#) to review the status of the forms.
- All rounds of pilot testing and subsequent adjustments have been concluded.
- All enumerators have ceased test or pilot submissions, and all subsequent form submissions do so.

If the above statements are true, click the button below to start live data collection.

SWITCH TO LIVE DATA COLLECTION

Access live forms

You will be able to access the live forms once you have confirmed that you are ready to commence live data collection. Please see the above section or page instructions for more information.

Read the guidance carefully and switch to live data collection when you are ready.

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 ID, enter the project ID listed below. Your device will be linked and you will have access to the forms listed below. Enumerators using this device 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

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.

A screenshot of the monitor data collection page. At the top, there's a summary section with two tables: 'Data Collected' and 'Summary'. A red speech bubble points to the summary table with the text 'A brief summary of data collected.' Below this is a 'Download raw data' section with a 'RAW SURVEY SUBMISSION DATA' button and a 'DOWNLOAD CSV' button. Another red speech bubble points to the 'RAW SURVEY SUBMISSION DATA' button with the text 'Download raw response data.'. Below these is a 'Submissions By Location' section with a table for 'Districts'. A red speech bubble points to this table with the text 'Show submissions by location at different levels.' The table shows data for District One and District Two, with a total of 8 households and 0 complete ones. The page also includes navigation tabs for DISTRICTS, SUB-DISTRICTS, VILLAGES, FARMS, and SUBMISSIONS, and a per-page dropdown set to 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.

The screenshot shows the 'Data Analysis' page of a survey dashboard. At the top left is the 'Survey Dashboard' navigation bar. On the right is a green 'INSTRUCTIONS' button with a help icon. The main content area has a title 'Data Analysis'. Below it is a section titled 'Download data for analysis'. It contains a list of what the dataset includes: 'All the data from the live data collection.', 'Agroecology and performance indicators, automatically calculated at farm level.', and 'A detailed data dictionary to help you navigate through the data.' A red callout bubble points to the 'SURVEY DATASET' download link. The 'SURVEY DATASET' link is accompanied by a blue circular icon with a white downward arrow. Below the link is a brief description: 'Download the complete dataset from your survey. This export includes calculated agro-ecology and performance indicators and a detailed data dictionary.' To the right of the download links is a blue 'DOWNLOAD XLSX' button. At the bottom of the page, there is a note: '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 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.'

Download the data for analysis.