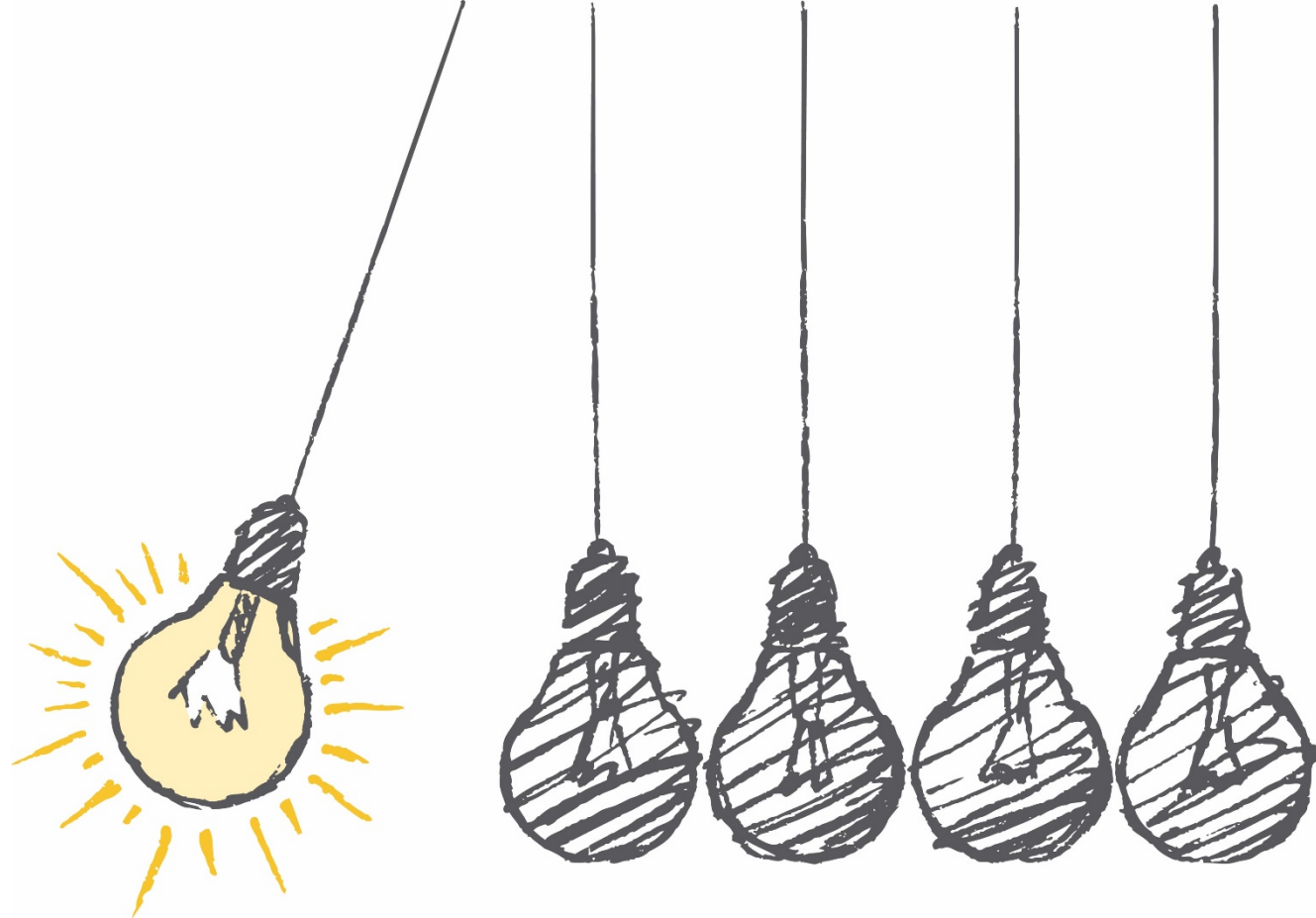# **SurveyCTO within the World Bank**

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About [SurveyCTO](#)

SurveyCTO is a powerful, field-tested platform that allows you to collect high-quality data using mobile phones, tablets, or computers—even when you're offline.
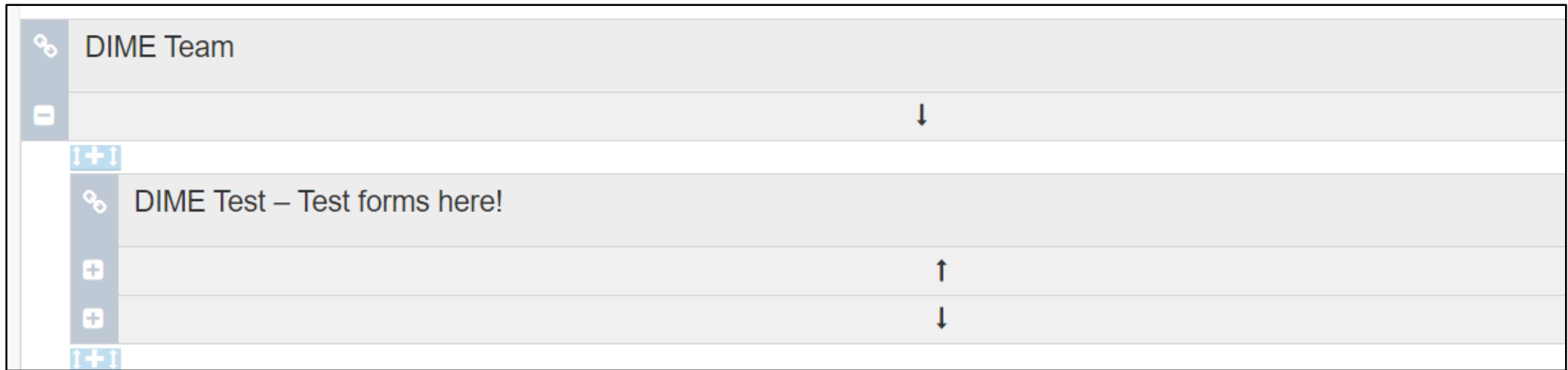
- World Bank has an enterprise solution for SurveyCTO server – [survey.wb.surveycto.com](#)
  - Any data on this server is secure and encrypted
  - Internal server is cheaper than the commercial server
  - Quick(er) responses from the SurveyCTO support team
  - Managed by DIME Analytics
  - Upgraded to a new and improved version (v2.6) in early January

What is a server?

- In SurveyCTO all questionnaires and data associated with a project sits on a server

- Main purpose: Allows project team to communicate with the data and the field team to collect and upload that data

- Not as technical as it sounds
    - For our purposes it is a just like a web page on the internet

DIME Team on the server

- All DIME team members have access to a server for free

- The DIME Team server can be used to create and test survey forms

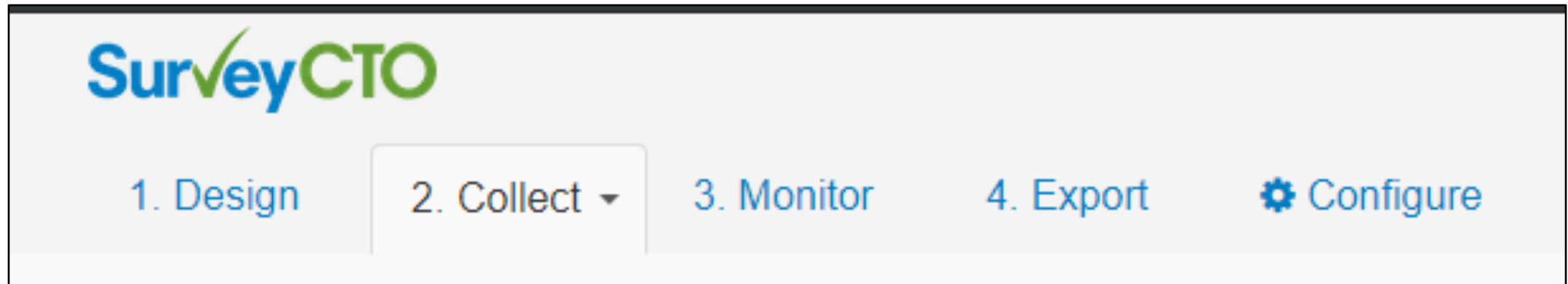- No data can be submitted on the test server

Requesting a server

- When to request a server?
    - When the team is ready to start data collection
- How much does a server cost?
    - $179 per month within the World Bank
- How to request a server?
    - Request on eServices [here](#) (requires intranet access)
- What to include in request?
    - Server name
    - Survey start and end date
    - Charge code
- Submit a request as early as possible with a <u>minimum 2 business days</u> to activate server
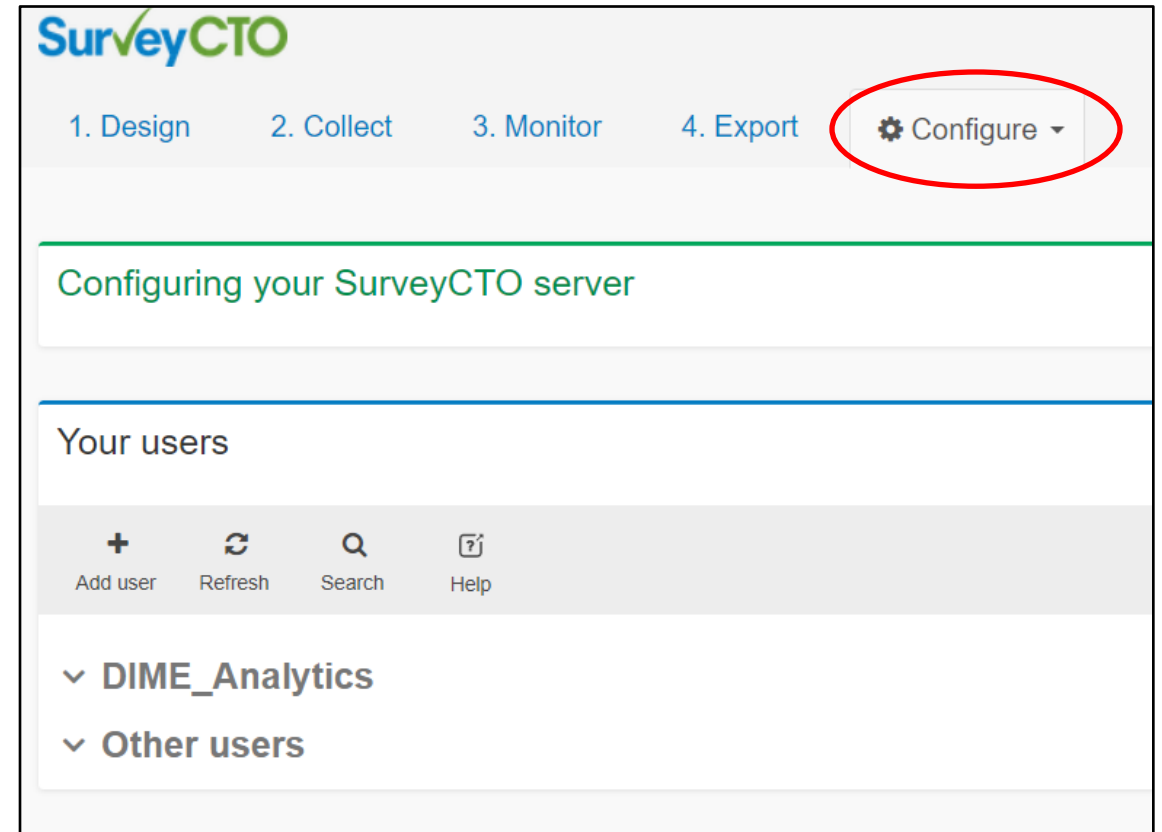
Interacting with the server

- Admins listed on the eServices request have access to the server once it is set up
- A server has the 5 tabs

Accessing the server

- Through the configure tab, the admin can
  - Add or remove any number of members
    - Members can be internal (i.e World Bank) or external
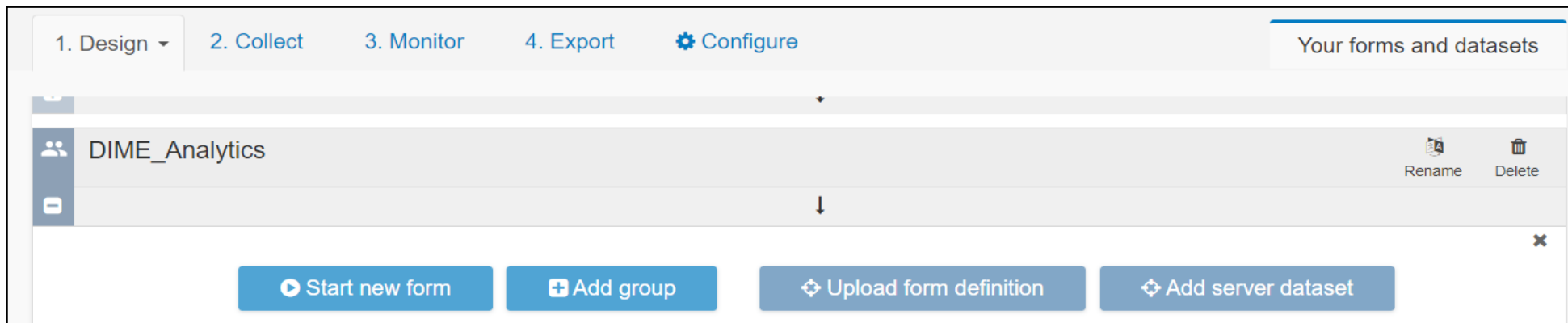 - Define level of access for each member (through roles)

Your team on the server

- The standard roles on each server are

  - Admin – complete access

  - Form & data manager – view and edit forms and data

  - Data manager – view and edit data

  - Enumerator – can only access forms on tablets for data collection

- Custom roles can be create by DIME Analytics for

  - Different access permissions from the standard ones listed above

    - E.g. Data view access for government counterparts

    - Up to 4 roles per server

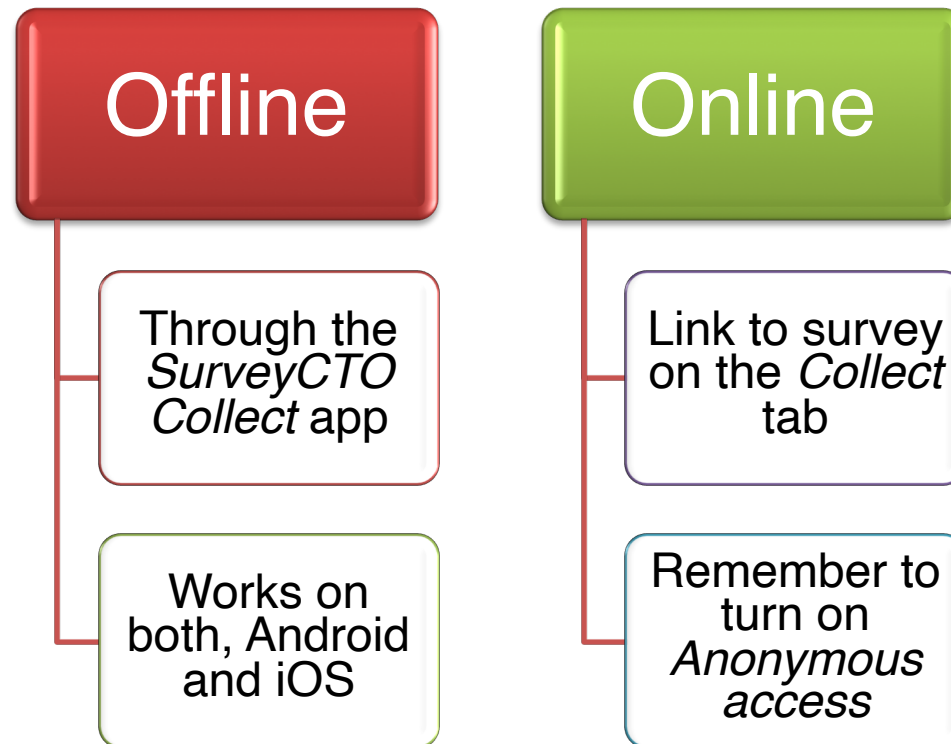 - A user requires access to more than 1 server

Setting up for data collection

- Tab to use: *Design*

- Design and upload survey forms to the server

- Forms can be designed using

  - Form builder (click and point)

  - [Excel](#)

- Another FC Continuing Education will cover designing survey SurveyCTO forms
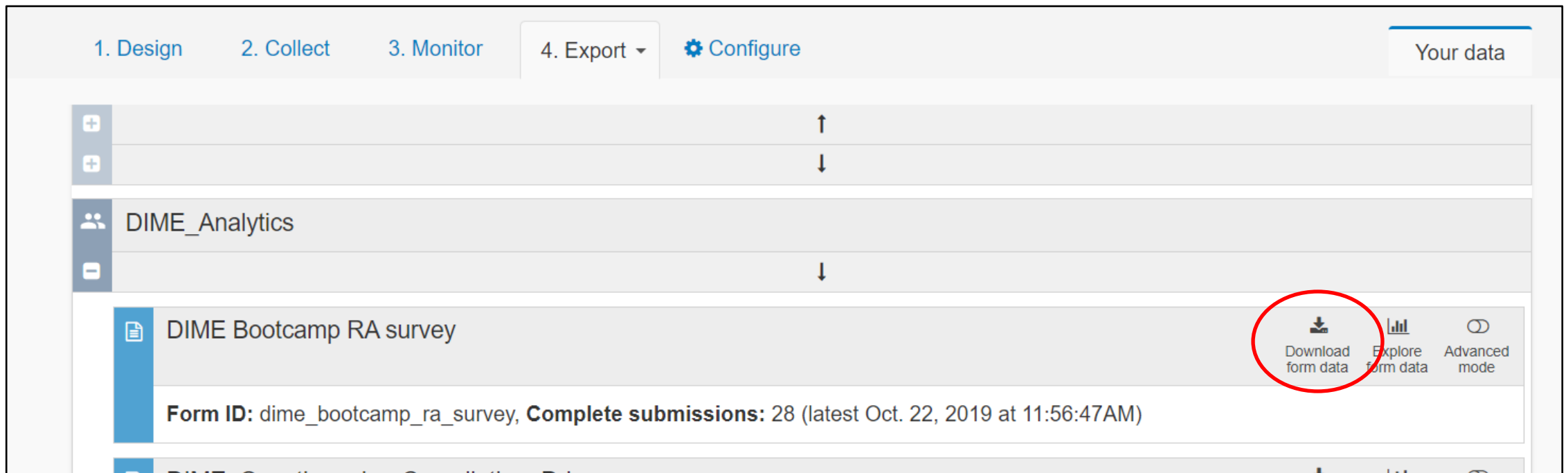
Collecting data

- Tab to use: *Collect*
- 2 modes of data collection

Offline

Through the *SurveyCTO Collect* app

Works on both, Android and iOS

Online

Link to survey on the *Collect* tab

Remember to turn on *Anonymous access*

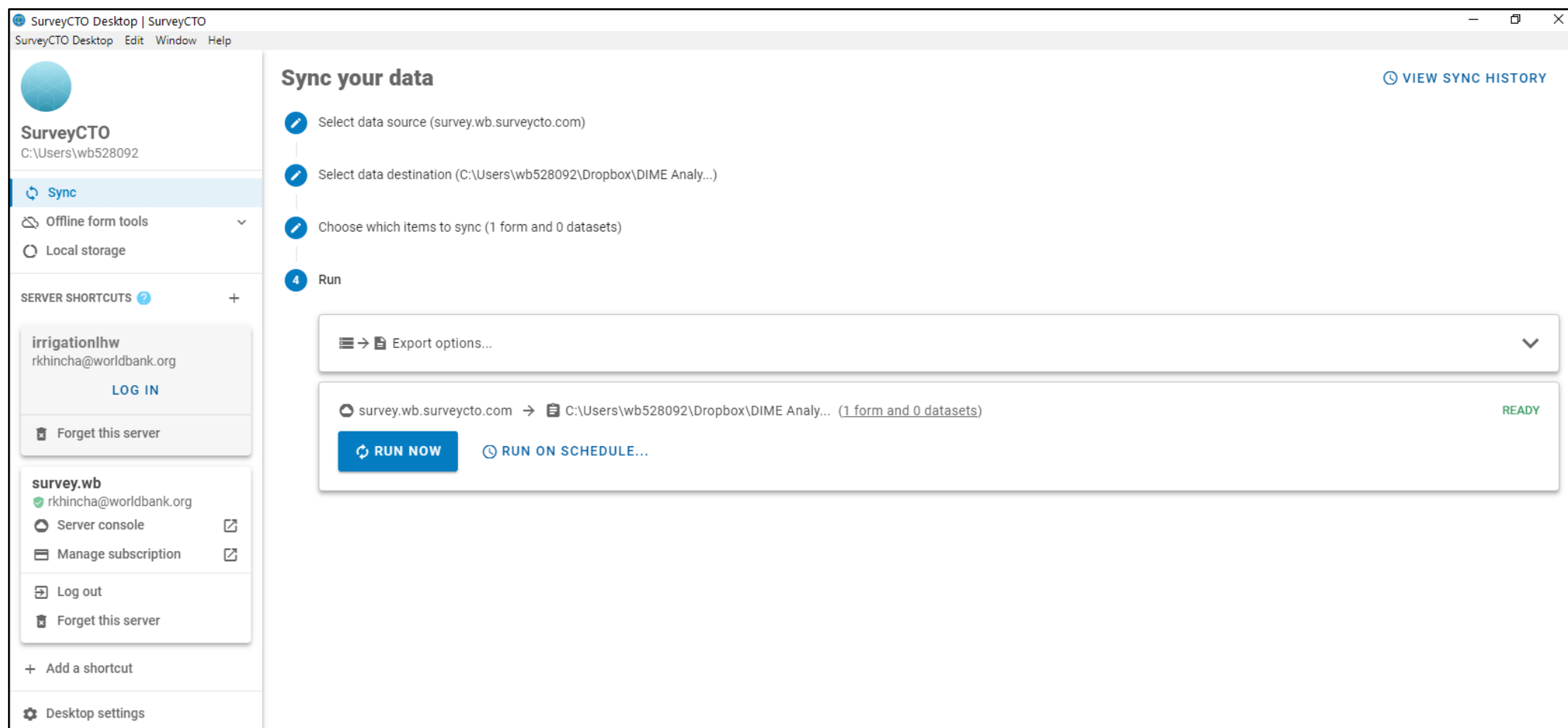# Downloading data

- Tab to use: *Export*

- Can publish certain fields directly to Google Sheets
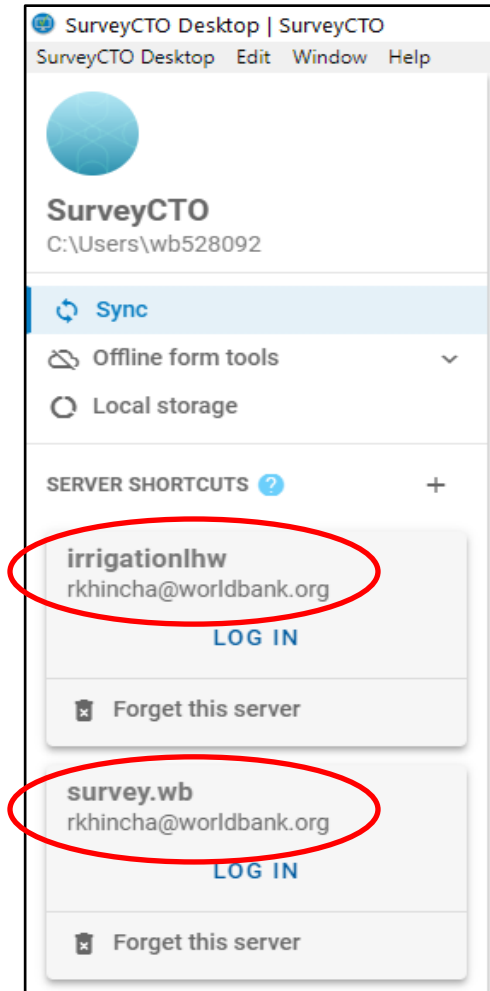
Downloading data using SurveyCTO desktop

- A more efficient way to download data from the server is using SurveyCTO Desktop

- New improved data export solution from SurveyCTO

- SurveyCTO Desktop is new to v2.6 and replaces SurveyCTO Sync

- Install SurveyCTO Desktop [here](#)

SurveyCTO Desktop

Benefits of SurveyCTO Desktop

- Multiple servers in same location
- Schedule data downloads
- Auto-run processes after data download such as
  – Import & append do file
  – High frequency checks

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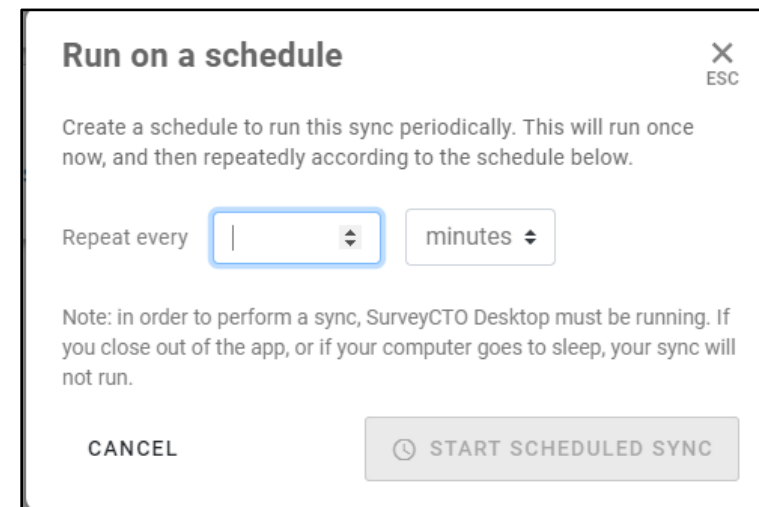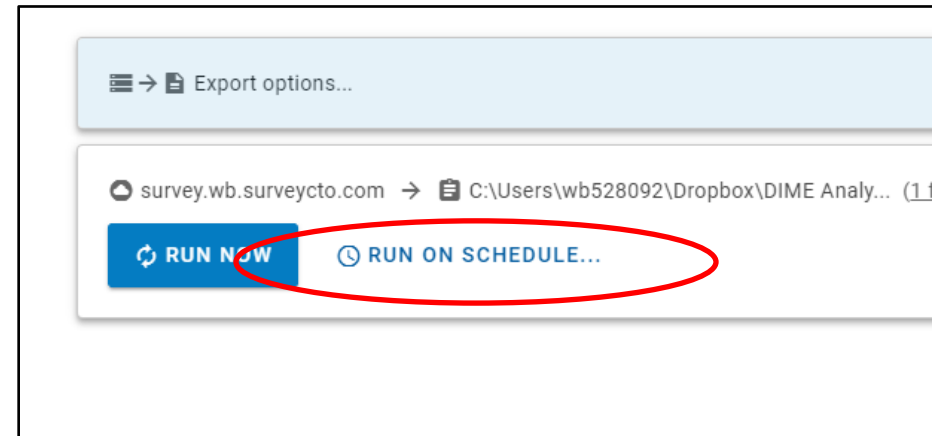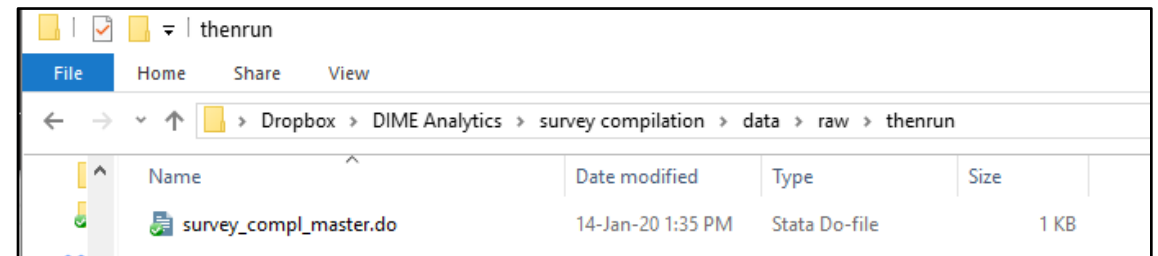 - High frequency checks

Benefits of SurveyCTO Desktop

- Multiple servers in same location
- Schedule data downloads
- Auto-run processes after data download such as
  - Import & append do file
  - High frequency checks

Auto-run other processors after export.
If enabled, all files in the "thenrun" subdirectory of your export directory will be executed after every export.

Requires creating a folder titled *'thenrun'* in the data export location which contains a do file to run.

	thenrun
File	Home Share View

← → ∨ ↑ 📁 › Dropbox › DIME Analytics › survey compilation › data › raw › thenrun

Name	Date modified	Type	Size
📄 survey_compl_master.do	14-Jan-20 1:35 PM	Stata Do-file	1 KB

Closing/extending a server

- Server closure reminder email ~1 week prior to closing date
- 2 possible options for next steps

Extend the server	Close the server

• Re-submit a new e-services request with
  • Same server name
  • New start date = End date of old server request
	• Reply to the closure reminder email
	• Create a copy on local computer and delete <u>all</u> forms and data from the server
	  • Else the team will be charged for another month of server time
	• Remember to upload a copy of the each questionnaire to the *Questionnaire library* in *DIME Team*

Points of contacts for questions

- [SurveyCTO support](#)

  – Technical questions about coding forms

  – Note that you reach out to the support center only when you have a paid server

- [DIME Analytics](#)

  – Admin questions about the server setup

Thank you!