

Aim and learning outcomes including the steps to making a survey

The aim of this screencast is to guide you through the steps to produce a form for ODK or Enketo, and to export the data for analysis. Firstly, you will design a data-entry form using Microsoft Excel. As part of this you will understand how to improve the quality of the data using required fields and basic skip logic. Once the form is completed, you will convert it into the format needed to upload it to the server. From here, you can view the forms on ODK or Enketo and enter data. Once data has been entered, you can submit the form and download the data for analysis.

We will now go through these steps in more detail. To start with, build the questionnaire in Microsoft Excel using the format XLS. You can find out more about XLS forms at xlsform.org. Once you have made the form in Excel, you should then convert it into an XML format using an online/offline application. The XML file can then be uploaded to the server. Once the file has been uploaded to the server, you can access the questionnaire/form through ODK or Enketo. Enter some test data, send the finalised form and download as a .csv file for analysis.

We will now show you how to build your questionnaire in Microsoft Excel.

First, open a new Excel form and label three sheets: 'survey', 'choices' and 'settings'. Bert will demonstrate how to do this.

In the survey sheet, label the columns. You will need the essential columns 'type', 'name' and 'label'. The columns 'required', 'relevant' and 'constraint' are optional but will reduce the errors with data collection. The type column refers to the type of question. Each type has its own unique code which we will demonstrate. The name column is the name of your variable which you will see in the .csv output file. The label is the question you will see on the tablet or the computer. This can be in multiple languages.

You should add 'yes' to the required column if you want the question to be answered and to prevent missing data. The relevant column is used for skip logic and the question will only appear if relevant. For example, a question about the type of car will only appear if the answer to the preceding question about owning a car is 'yes'. The constraint column sets a limit for answers which are acceptable. The appearance column is used for the display of the questions on the screen. We do not cover it within this screencast however, if you want more than one question to appear on the same page, you'd use grouping with the appearance as a table or field list. The appearance function also allows us to, for example, change the way we'd see the calendar for a date.

The choices sheet requires three essential columns: 'the list name', the 'name' and the 'label'. The list name is the list of options and the name are the possible answers. For example, you might have a question 'which is your highest level of education?'. The list_name may therefore be 'education' - this could be same as or differ from the variable name. The name includes the different options for education e.g. primary, secondary, tertiary or nil. The label refers to the answers you will see in the form e.g. on the device.

The types of questions may include select one where you can choose only one option, multiple choice where you can choose multiple options, free text which allows does not specify the answers but allows

you to enter any text, a number, date e.g. the date of birth or date an event happened, GPS coordinate e.g. of the centre of the village, the scan of a barcode e.g. for an ID sticker or laboratory sample or a photo which allows you to take a photo. The text in brackets shows how these should be entered in XLS forms.

The settings sheet must include the public key. This is the key needed to encrypt the form so that the data cannot be viewed once saved. The other columns are optional but are good practice. These include the form title which is the name of the form which will appear in the list of forms on ODK or the top of the Enketo webform, the form ID which is unique to each form and will be seen on the server, the version number which is normally the date and time the form is produced, the default language e.g. the language you want the form to appear in, although this can be changed within the ODK application/Enketo webform, the change log e.g. the name of the person making the changes, the version and a short description of the changes and finally, the style. The style is only used for Enketo to enable your webform to appear across multiple pages or make it look like a paper questionnaire. Save this file onto your computer.