

Module 8: Advanced data collection with SurveyCTO

Terre des hommes, Iraq

Part of this support was adapted from materials provided by Doherty, Inc., the creators of SurveyCTO

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Training agenda

- Module 1: Introduction to SurveyCTO
 - General overview of the platform
 - Getting started on SurveyCTO mobile on a test survey
 - SurveyCTO vs Kobo: what are the differences?
- Module 2: Setting up a project
 - Presentation of survey management and workflow with SurveyCTO,
 - form life cycle,
 - user rights
 - Overview of data management
- Module 3: Data quality
- Module 4: Data analysis
 - Data Explorer
 - Exporting data
 - Set up of data analysis in other tools
- Module 5: Data protection in SurveyCTO
 - Data protection in SurveyCTO
 - Setting up data protection in SurveyCTO
- Module 4: Datasets/ basic case management
 - Overview of the notions
 - Set up of a test WASH follow up form

Objectives

- 👤 Understand the potential and use cases associated to SurveyCTO compared to other tools in use in Tdh
- 👤 Know how to set up a mobile data collection with relevant data management and life cycle in SurveyCTO
- 👤 Know how to set up the SurveyCTO possibilities such as data quality possibilities, data protection and basic case management



Why this training?

- ❶ Tdh often manages personal information and/or sensitive data → Kobo is not a sufficiently secure tool for this
- ❷ The follow up of infrastructure, people etc is often necessary to improve the quality of action of Tdh, and is not possible (or very difficult to set up) with more standard MDC tools

The most used MDC tools in Tdh

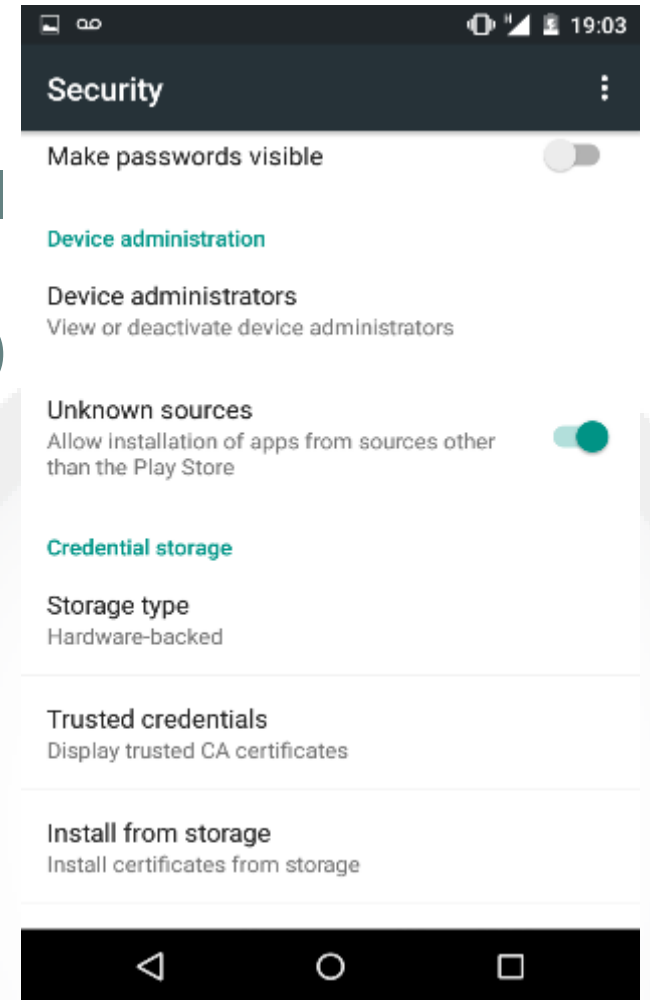
 Here are the MDC tools used in the Tdh context:

| Tool | Summary |
|---|--|
|  KoBoToolbox | Open Source tool that is free for the humanitarian actors. Suitable for simple surveys, without very sensitive data, sometimes a little unstable |
|  CPIMS+ | UNICEF/IRC/Save the Children business tool dedicated to child protection, for the use of social workers. |
|  SurveyCTO | Advanced paying tool that makes a certain level of case management possible, with excellent management of sensitive data -a little more complex to put in place than the above |
|  CommCare HQ | Open Source paying tool adapted to the follow-up of cases in the Health field (includes SMS component)- a little more complex to put in place than the above. Used in certain West African contexts (IEDA project) |

Introduction to SurveyCTO

First overview of SurveyCTO

- ❶ Open your Android device
- ❷ Access
«**ServerName**.surveycto.com/collect» through a navigator (adapt to your SurveyCTO server name)
- ❸ Download the SurveyCTO app (you may need to « allow unknown sources » in your security settings)



Specify the server address

The screenshot displays the ODK Aggregate application interface. The top status bar shows the time as 11:28 AM and battery levels at 87%, 86%, and 86% respectively. The main menu on the left includes options like 'Fill Blank Form', 'Edit Saved Form', 'Send Finalized Form', 'View Sent Form (2)', 'Get Blank Form', and 'Delete Saved Form'. The 'General Settings' section in the middle has a 'Server' option highlighted with a green box. The 'Server Settings' section on the right shows the 'Type' as 'ODK Aggregate' and the 'URL' field highlighted with an orange box, containing the text '(adapt)'. The 'Username' and 'Password' fields are also highlighted with orange boxes and contain the text '(adapt)'.

First overview of SurveyCTO

- 👤 Download and fill the DemoCartONGTraining form
- 👤 What did you find particularly interesting?

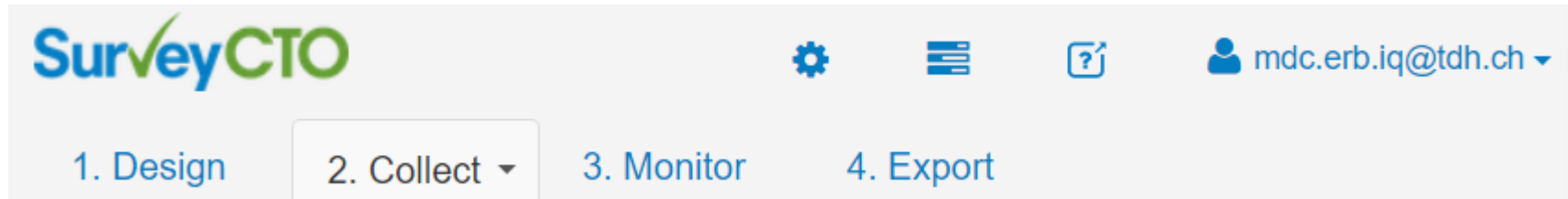


Kobo vs SurveyCTO: the main differences

| | Advantages of Kobo | Advantages of SurveyCTO |
|--------------------------|--|--|
| General | Free Open source | Individual server for the organization maintained by SurveyCTO, good management of tool updates Good management of form revisions |
| Interface | User-friendly analysis features directly embedded in the interface | Mobile and web interface more user friendly and user centric |
| Data quality | Easy modifying of a submission | Advanced monitoring of team members Automated Quality Checks |
| Data security | User rights can be project based (Enterprise version in SurveyCTO) | Good management of encrypted data in the platform Ability to manage encryption with a simple web interface Additional automated backups to device's internal storage |
| Advanced features | | Basic case management easy to set up (injecting data from one form to another) |

Setting up a project

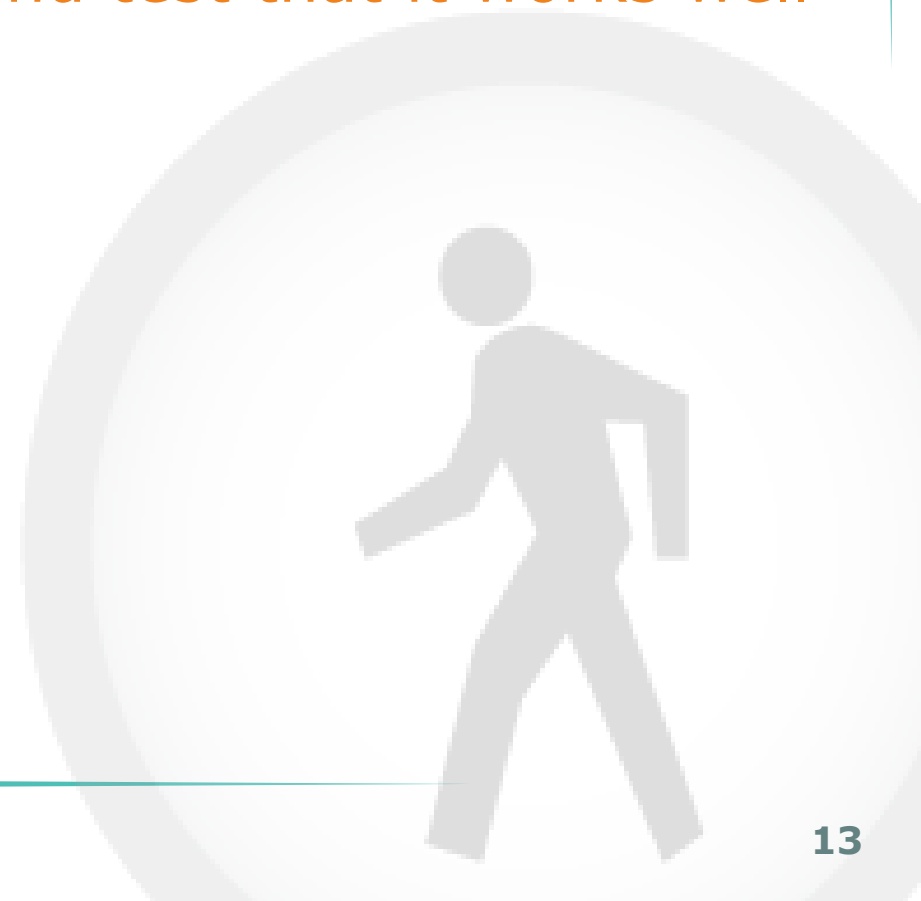
The server console



- 👤 the Design tab – to create, edit, deploy, and preview your survey forms
- 👤 the Collect tab – to share the web version of your survey forms after they have been deployed
- 👤 the Monitor tab – to follow completed submissions and monitor your data for errors
- 👤 the Export tab – to directly analyse or download your collected data

Exercise

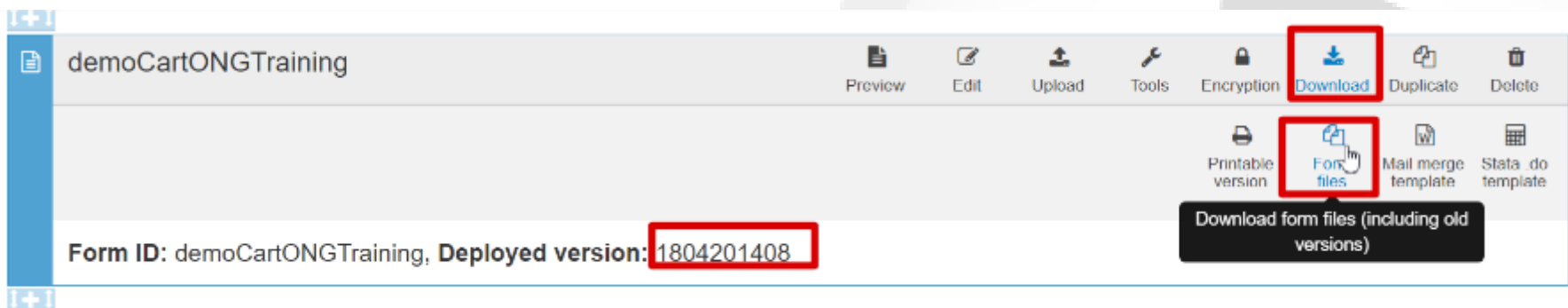
- ❶ Import the reduced Post Distribution Monitoring XLSform (create a group with your name, and make sure all your forms have your name in the title during this training) and test that it works well with SurveyCTO



Survey life cycle

- 👤 Automatically calculated once per minute
 - See the settings sheet
 - YYMMDDHHMM format
- 👤 Past versions:
 - Design > Form > Download > Form files > Previous deployed versions

👤



The screenshot shows the interface for 'demoCartONGTraining'. The top navigation bar includes icons for Preview, Edit, Upload, Tools, Encryption, Download, Duplicate, and Delete. The 'Download' icon is highlighted with a red box. Below the navigation bar, the 'Form files' option is also highlighted with a red box. A tooltip below 'Form files' reads 'Download form files (including old versions)'. At the bottom, the 'Form ID: demoCartONGTraining, Deployed version: 1804201408' is displayed, with the version number highlighted by a red box.

demoCartONGTraining

Preview Edit Upload Tools Encryption Download Duplicate Delete

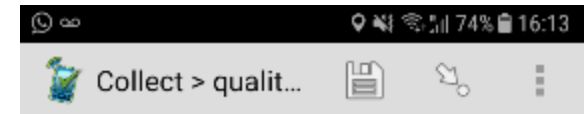
Printable version Form files Mail merge template Stata do template

Download form files (including old versions)

Form ID: demoCartONGTraining, Deployed version: 1804201408

Non-linear form navigation

- ❶ SurveyCTO Collect supports hyperlinking
- ❷ If hyperlinking is activated in Collect, any references to group names or variables in labels will appear as hyperlinks on the device screen
- ❸ This allows users to create “navigation menus” in the form
- ❹ When colored form navigation is enabled in *SurveyCTO Collect*, hyperlinks to groups will be colored red or green depending on whether one or more required fields within the group still require responses



Exercise

- ❶ Change your form (online or in XIs form, as you prefer) by adding a reference to a previous field in a note
- ❷ Make hyperlinks visible on ODK Collect
- ❸ Deploy your changes & note how SurveyCTO manages the versioning of the form (& check out the hyperlinks at the same time!)

User rights

- 👤 Explore the possibilities of the platform
- 👤 Note that it is not possible with the Premium licence to limit the rights of a user to only a given project

Access: Data manager (collection and download)

Edit Delete

User role

Current role: **DATA MANAGER (COLLECTION AND DOWNLOAD)**

Change role to:

- Administrator (full access, plus subscription management)
- Form, data, and user manager (can also administer users)
- Form and data manager (can administer forms and datasets)
- Data manager (collection and download)
- Data collection only

Password

New password:

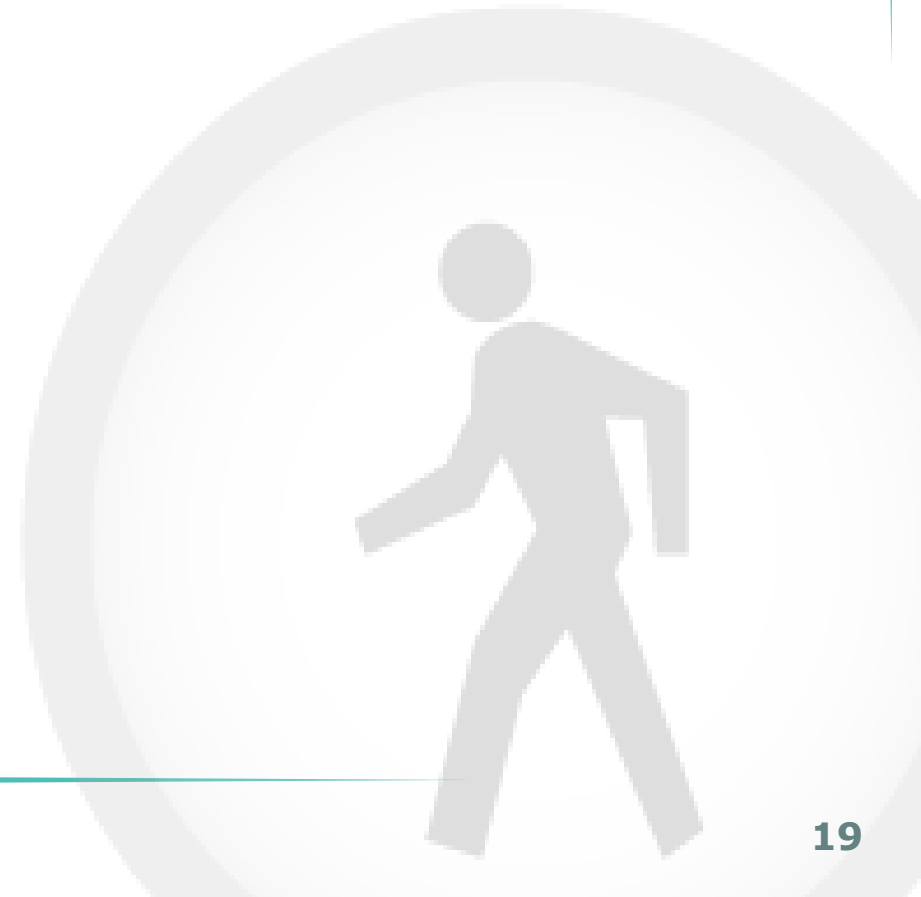
Re-enter password:

Cancel Change password

Data quality

Exercise

- ❶ What are the data quality features that you can think of relating to Mobile Data Collection?



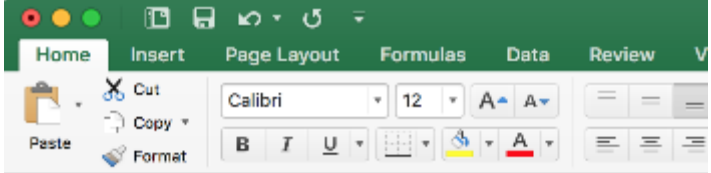
Specific good data quality possibilities of SurveyCTO

- 🕒 Beyond the usual data quality features that all ODK related software possess:
 - Constraints(regex etc)
 - Inbuilt calculations
 - Skip patterns
 - General data monitoring through near real-time data visualisation
- 🕒 ...SurveyCTO offers:
 - Form audits: Text/audio/speed Audits
 - Using automated data quality checks
 - Defining a workflow for data validation

Form audits: Text Audits

- Field type: "text audit"
 - Number of seconds spent on a question / field
 - Supplementary CSV media file
 - Optional appearance column parameter:
 - "p" for probability:
p=50 (for 50%)

| type | name | appearance |
|------------|------------|------------|
| text audit | text_audit | p=50 |



The screenshot shows a spreadsheet application with a ribbon menu (Home, Insert, Page Layout, Formulas, Data, Review) and a toolbar. The active sheet is 'Sheet1'. The data table has three columns: 'Field name', 'Total duration (seconds)', and 'First appeared (seconds into survey)'. The table contains 24 rows of data, including fields like 'date_enum', 'start_time_enum', 'first_letter_name', 'enumerator', 'district', 'mandal', 'census_village', 'note_uniqueid', 'building_type', 'note_consent', 'consent', 'audio_consent', 'resp_name', 'resp_hoh', and various 'has_consent' entries for different locations and phone numbers.

| | A | B | C |
|----|---------------------------|--------------------------|--------------------------------------|
| 1 | Field name | Total duration (seconds) | First appeared (seconds into survey) |
| 2 | date_enum | 14 | 46 |
| 3 | start_time_enum | 1 | 61 |
| 4 | first_letter_name | 3 | 62 |
| 5 | enumerator | 6 | 64 |
| 6 | district | 3 | 71 |
| 7 | mandal | 3 | 73 |
| 8 | census_village | 3 | 76 |
| 9 | note_uniqueid | 2 | 79 |
| 10 | building_type | 4 | 82 |
| 11 | note_consent | 2 | 85 |
| 12 | consent | 2 | 87 |
| 13 | audio_consent | 2 | 89 |
| 14 | resp_name | 3 | 91 |
| 15 | resp_hoh | 3 | 94 |
| 16 | has_consent[1]/village | 3 | 97 |
| 17 | has_consent[1]/habitation | 3 | 100 |
| 18 | has_consent[1]/landmark | 3 | 103 |
| 19 | has_consent[1]/phone_1 | 6 | 106 |
| 20 | has_consent[1]/phone_1_o | 3 | 111 |
| 21 | has_consent[1]/phone_1_o | 3 | 111 |
| 22 | has_consent[1]/cult_crops | 4 | 115 |
| 23 | has_consent[1]/aadhaar_fa | 6 | 119 |
| 24 | has_consent[1]/she_aware | 3 | 125 |

Form audits: Text Audits

- 🕒 Timestamp alternative
 - calculate_here fields

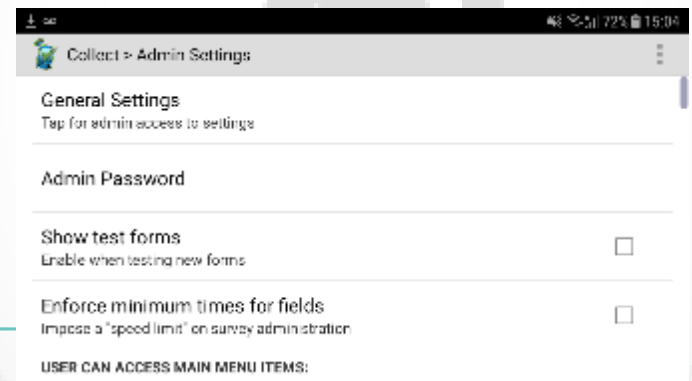
| | type | name | calculation |
|---|----------------|-----------|--|
| 7 | calculate_here | fieldname | once(format-date-time(now(), '%Y-%b-%e %H:%M:%S')) |

Form audits: Speed Limits

- “minimum_seconds” survey sheet parameter
- Set a required number of seconds per field

| type | name | label | minimum_seconds |
|------------------|-----------|--|-----------------|
| | | Welcome to the sample auditing form. Please swipe forward to continue. | |
| note | intronote | NOTE: You are being recorded. | 15 |
| select_one yesno | consent | Would you like to continue? | 10 |

- ⓘ Either invisible to enumerator or else blocking him (see Admin Settings on Collect)



Collect - Admin Settings

General Settings
Tap for admin access to settings

Admin Password

Show test forms ☐
Enable when testing new forms

Enforce minimum times for fields ☐
Impose a "speed limit" on survey administration

USER CAN ACCESS MAIN MENU ITEMS:

Form audits: Speed Limits- count & list

- ❶ **speed violations count** : Counts number of fields for which minimum_seconds is violated.
speed violations list: Lists names of fields for which minimum_seconds is violated.
- ❷ **"speed violations audit"** field:
 - "v" for number of violations it takes to activate:
 - "d" (duration) for number of seconds to record for
 - Example: after 5 violations, record for 120 seconds

| type | name | appearance |
|------------------------|----------------|------------|
| speed violations count | speedViolCount | |
| speed violations list | speedViolList | |
| speed violations audit | speedViolAudit | v=5;d=120 |

Form audits: Audio Audits

- ❶ Random audio recordings: **"audio audit"** field type
- ❷ Appearance column parameters:
 - "p" for probability - e.g. = 50 (for 50% of the sample)
 - "s" for start
 - Could be # of seconds into form: **s=120** (for 2 minutes)
 - Could be a random # of seconds : s=60-240 (1 to 4 minutes)
 - Could be field name: **s=fieldname**
 - "d" for duration
 - Could be # of seconds to record: **s=120** (for 2 minutes)
 - Could be field name: **d=fieldname**

| type | name | appearance |
|-------------|-----------|-------------------------------|
| audio audit | fieldname | p=10;s=20;d=60 |
| audio audit | fieldname | p=50;s=0-600;d=30 |
| audio audit | fieldname | p=50;s=firstfield;d=lastfield |

Automated quality checks

 (Available for numeric questions)

Create a new quality check

Select the type of quality check:

Value is too frequent

Use this to check for a particular value's frequency and warn whenever it is above the threshold you specify.

Select the fields to be checked:

- ☐ province
- ☐ district
- ☐ gps_location
- ☐ consent
- ☐ respondent_name

Warn when this field value:

0

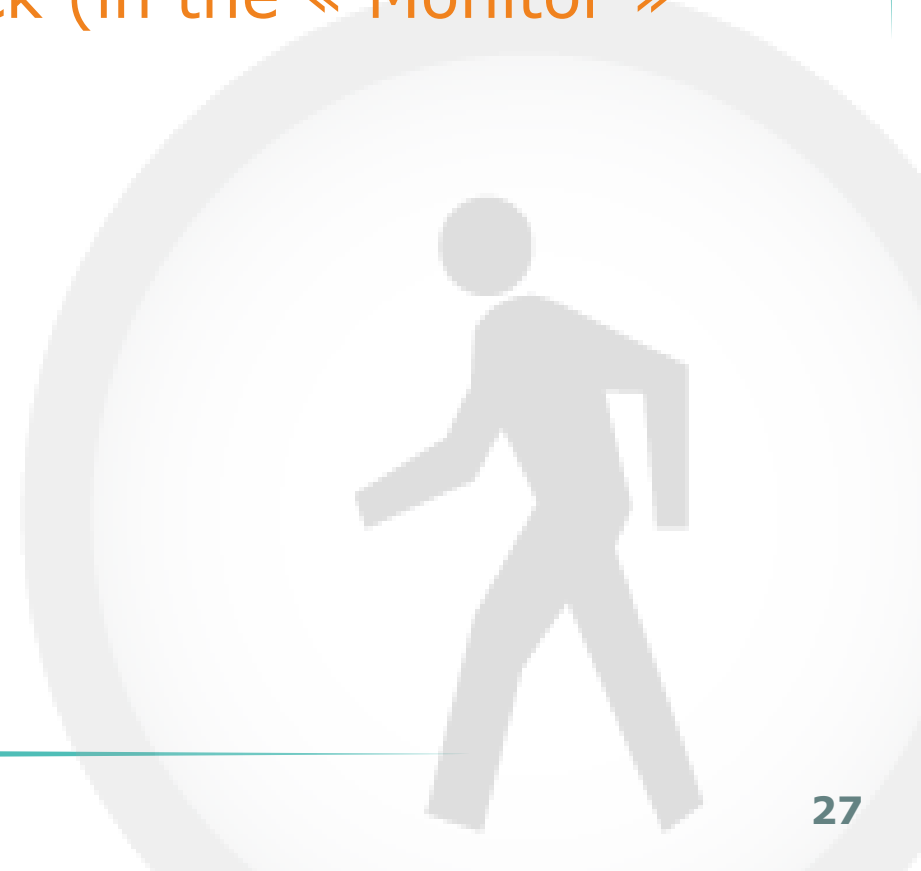
Leave blank to check for missing values.

Occurs > this % of the time:

20

Exercice

- ❶ Add to your form :
 - 1 relevant speed limit
 - 1 text audit
 - 1 automatic quality check (in the « Monitor » section)
- ❷ deploy it and test it



Survey workflow



Many aspects can be defined in the survey workflow:

- Flagging submissions
- Holding them for review
- ...

Enable review and correction workflow for this form?

YES

Submissions to flag and hold for review

Choose which submissions will be held for review. These submissions will require approval before being exported or published to downstream systems.

None

Some

All

Some incoming submissions will be flagged for review

☒ Flag incoming submissions based on results of quality checks

Requires at least one quality check to be set up. [Click here to learn how to set up quality checks...](#)

All

Only critical

☒ Flag any submission with a submission-specific QC warning (e.g., "value is too high")

☐ Flag any submission that is part of a *group* that triggered a QC warning during the last full evaluation (e.g., "group mean is different")

☐ Flag any submission that would further contribute to a field-specific QC warning raised during the last full evaluation (e.g., "value is too frequent")

☐ Flag a random percentage of submissions

Corrections require comments

You can require users to enter a comment to explain every correction they make.

ON

Comments required

Un-approve and un-reject

The un-approve and un-reject options allow reconsideration of submissions, so that further comments and corrections can be made. May have [consequences for downstream data systems](#).

OFF

Un-approve and un-reject disabled

Approve-all

The approve-all option allows users to bulk-approve all submissions awaiting review, rather than reviewing and approving them individually.

OFF

Approve-all button hidden

Encrypt all comments

You can encrypt comments in case they might contain (or allude to) sensitive data. If enabled, users will need the private key in order to view or export comments.

OFF

Comments will be unencrypted

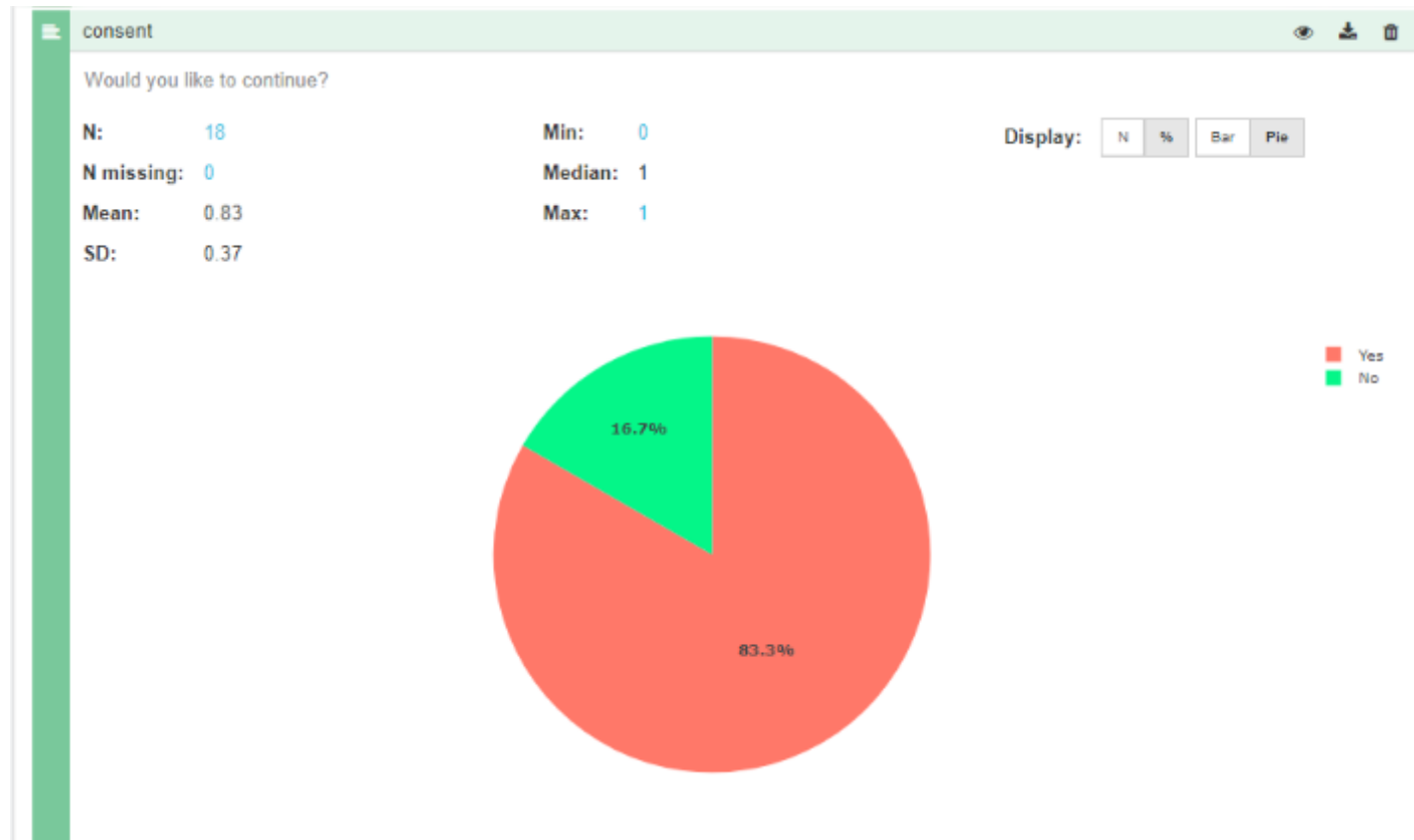
Cancel

Save

Data analysis

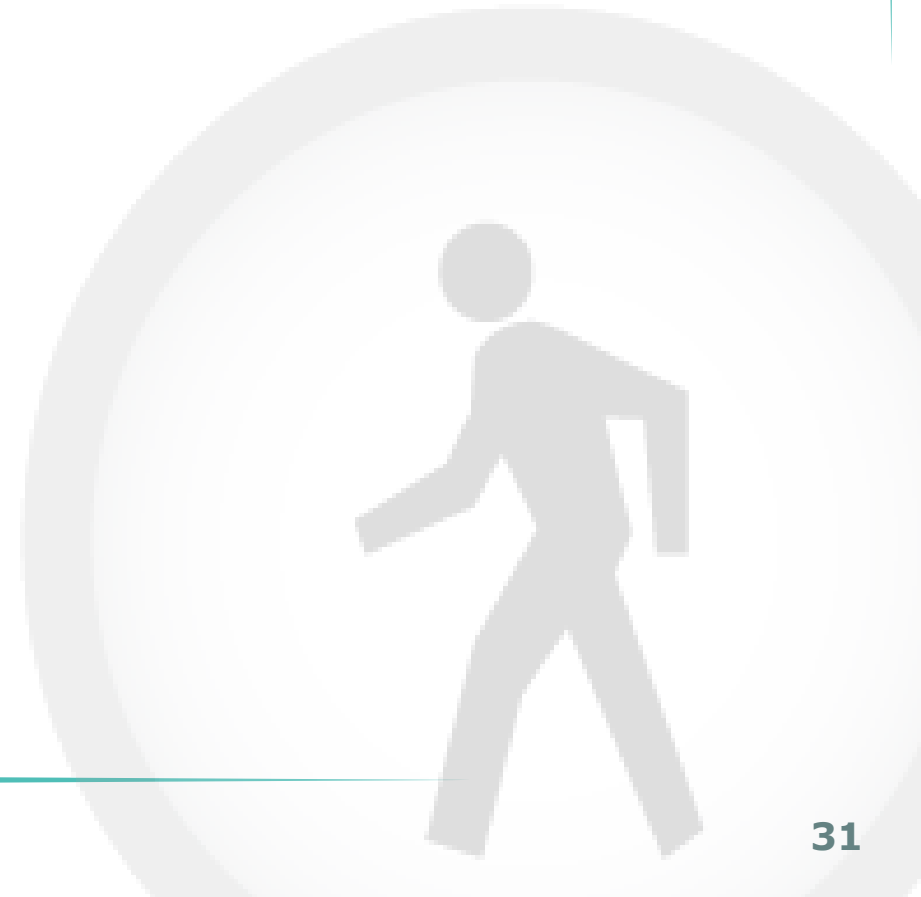
The Data Explorer

- Launch the data explorer through the « Monitor » tab and selecting the relevant fields



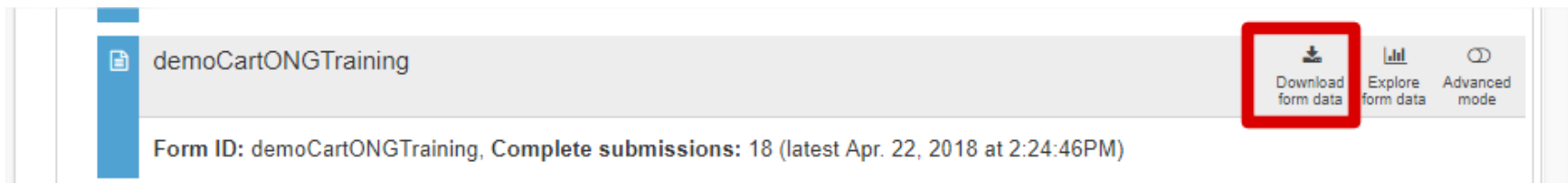
Exercice

- 👤 Set up a data explorer adapted for your survey's needs (check your analysis plan) and save it



Basic export

 You can export your data in CSV format to Excel or for manual import in other tools (through the « export » tab)



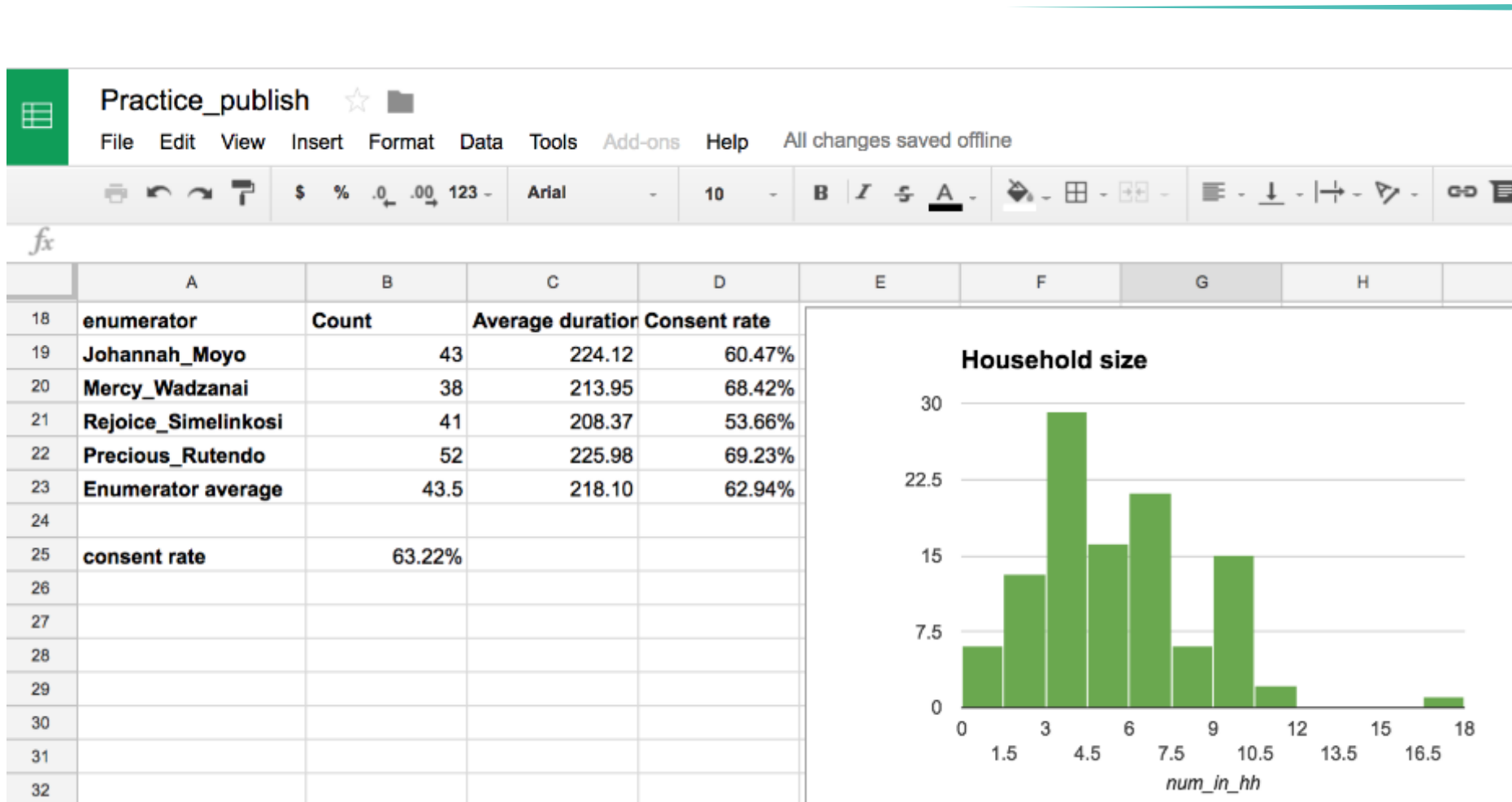
You can also use SurveyCTO Sync if you want to make your exports more automatic



Integration with other tools options

- ❶ You can also integrate it with other tools automatically, such as:
- ❷ Google Sheets
- ❸ Google Fusion Tables
- ❹ Google Earth
- ❺ Salesforce (via Zapier or Openfn.org)
- ❻ ...Other systems using SurveyCTO's API, webhooks

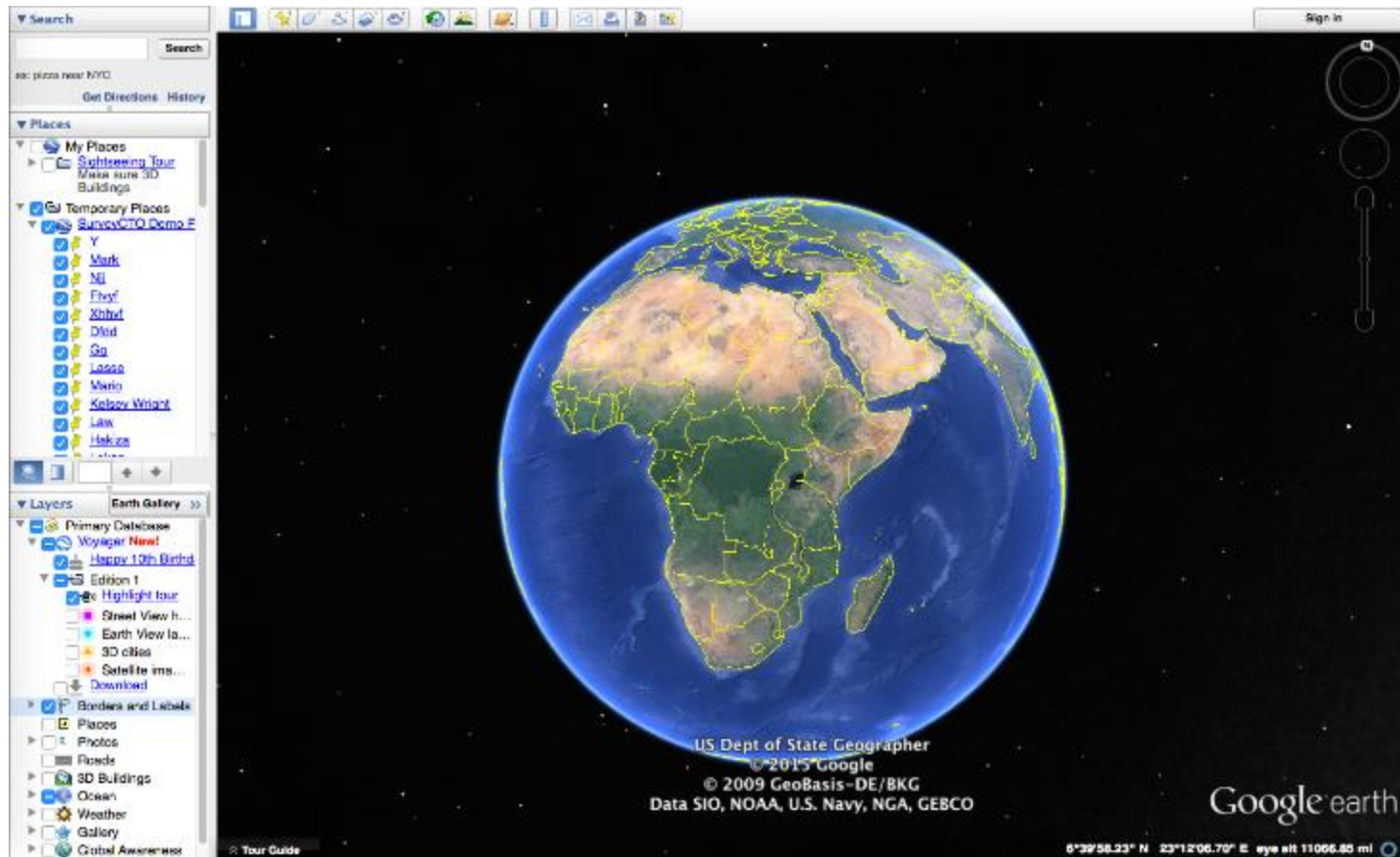
Google Sheets Publishing



Tips & tricks

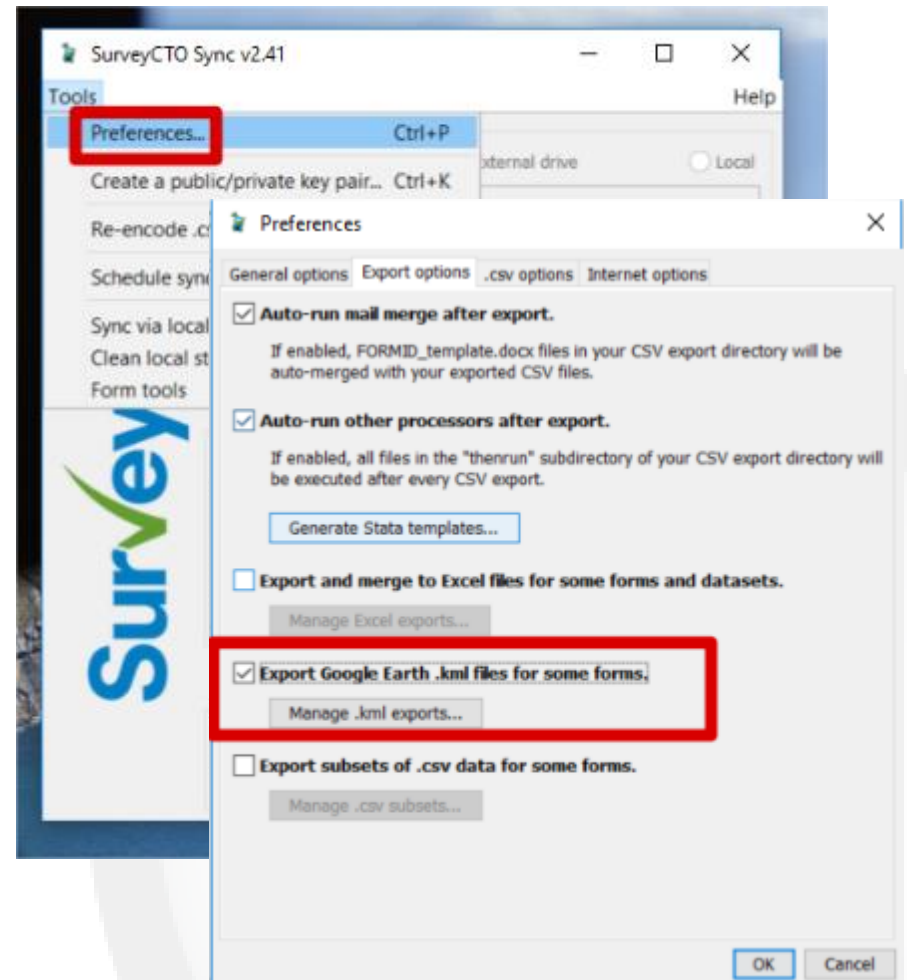
- ❶ If you want to publish certain data only to a google sheet (or a dataset), you will need to base it on a field in the source form that has value 1 or 0 (ex: « is_eligible »)- such as a calculated field.
- ❷ The data can take a few minutes to update in the Google Sheet
- ❸ You can modify the data in the google sheet, but you can not modify the data in the source form

Integration options: Google Earth



Integration options: Google Earth

- ❶ In SurveyCTO Sync, go to “tools”, “preferences” and explore the fourth option in the “Export Options” and then explore your data





Data protection in SurveyCTO

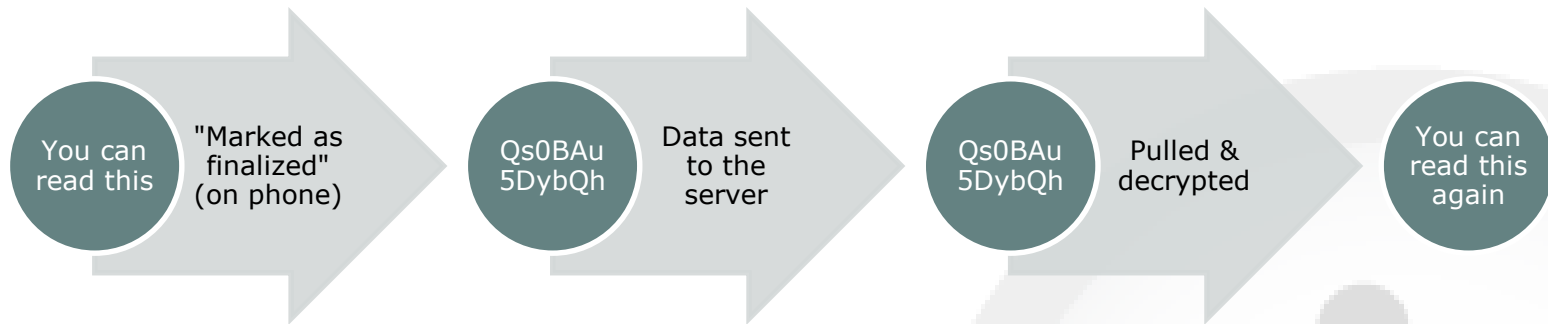
Protection features of SurveyCTO

- 👤 SurveyCTO is EU-based hosting option
- 👤 Secure Sockets Layer (SSL) for data in transit
- 👤 Optional form encryption
- 👤 Cold room computer support
- 👤 On-device backups
- 👤 Server-side redundancy - minute to minute for 30 days



What is encryption?

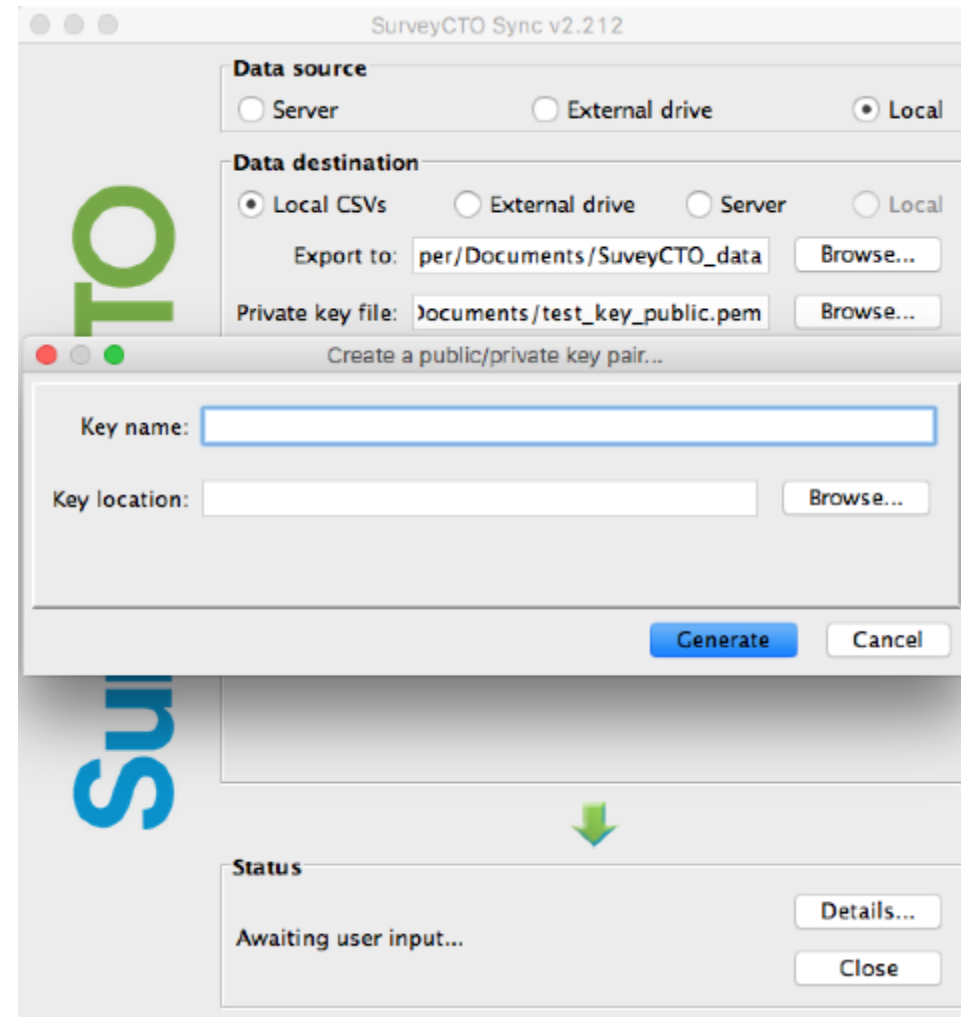
- ❶ Encryption is the method by which plaintext or any other type of data is converted from a readable form to an encoded version that can only be decoded by another entity if they have access to a decryption key



- ❷ Encryption works with the combination of a **public key** and a **private key**.
 - A **key** (public and private) is a unique long string of characters.
 - The **public key** is used to transform the readable text collected into a random string of alphanumeric characters that cannot be identified.
 - The **private key** is essential to decrypt the data.
- ❸ Encrypted data is only as safe as the private key is managed

Form encryption

- ❶ Generate public/private key pair
 - online from the server console
 - offline using SurveyCTO Sync
 - With an external software
- ❷ Decrypt using the private key:
 - online from the server console
 - offline with SurveyCTO Sync
- ❸ For security reasons, you cannot update an existing form on your server, changing it from:
 - Unencrypted to encrypted
 - Encrypted to unencrypted
- ❹ Publishable fields marked “yes”



Cold room computer

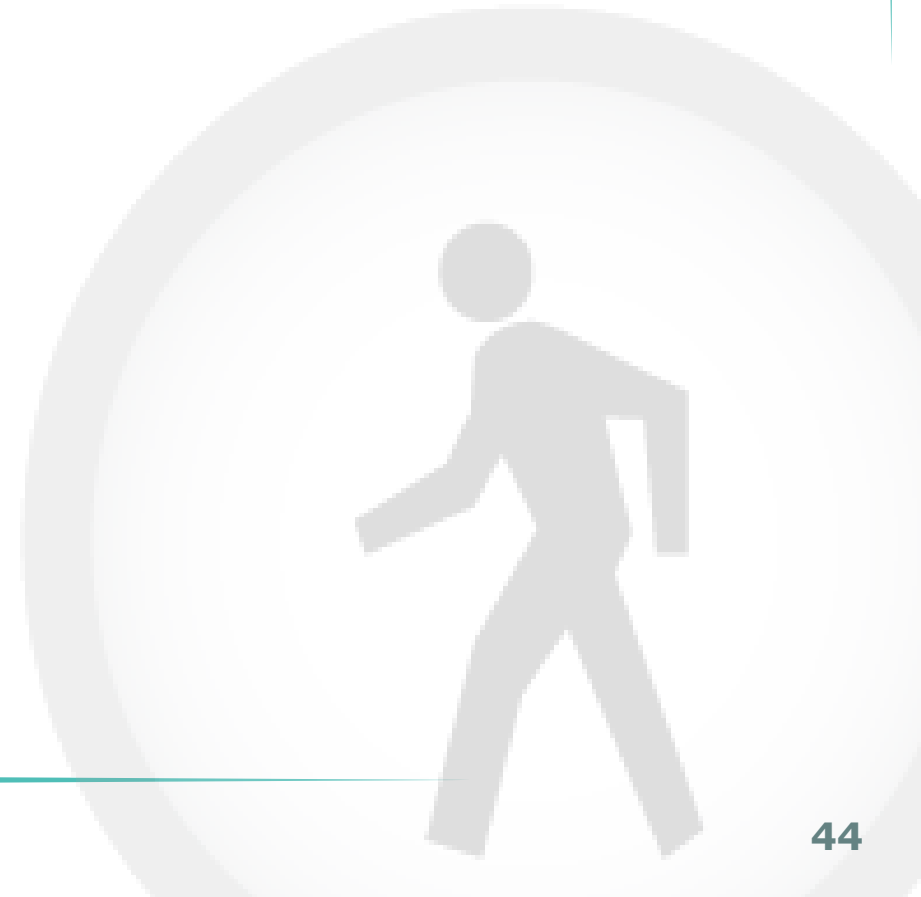
- ❶ For added security, you may choose not to store that private key on an Internet-connected computer;
- ❷ the user may use SurveyCTO Sync to transport the data to a secure "cold-room" computer, and only then decrypt the data.



Server datasets & basic case management

Exercice

- ❏ Anyone ready to explain what data preloading is?



Data pre-loading

- It means that you can attach an external CSV to a form
- Means you can update the CSV without changing the form
- See example: Attendance lists

| | A | B | C |
|----|-----------------------------|---|---|
| 1 | id,name,grade | | |
| 2 | 1,Bach Deirdre,grade1 | | |
| 3 | 2,Bagnell Mercedes,grade1 | | |
| 4 | 3,Boyden Ena,grade1 | | |
| 5 | 4,Broeckel Stephnie,grade1 | | |
| 6 | 5,Chabot Sindy,grade1 | | |
| 7 | 6,Claunch Librada,grade1 | | |
| 8 | 7,Darbonne Celestina,grade1 | | |
| 9 | 8,Delpriore Geri,grade1 | | |
| 10 | 9,Demeritt Ilda,grade1 | | |
| 11 | 10,Disanto Evelina,grade1 | | |
| 12 | 11,Duron Crissy,grade1 | | |

| | A | B | C | J |
|----|----------------------------|-----------------|--|--|
| 1 | type | name | label::English | appearance |
| 2 | date | date | What is the date ? | |
| 3 | select_one activityType | activityType | What is the type of activity? | |
| 4 | select_one sessionAnimator | sessionAnimator | Who is giving the session? | |
| 5 | select_one sessionType | sessionType | What type of session is it? | |
| 6 | select_one grade | grade | What is the grade concerned? | |
| 7 | select_multiple attendee | attendee | What are the names of the children present ? | search('preloadchildren','contains','grade',{grade}) |
| 8 | | | | |
| 9 | | | | |
| 10 | | | | |
| 11 | | | | |
| 12 | | | | |
| 13 | | | | |

- Appearance setting of the question:
 - "search(source, 'contains', columnsToSearch, searchText)«**
 - This filters the list of children based on the answer to a previous question.

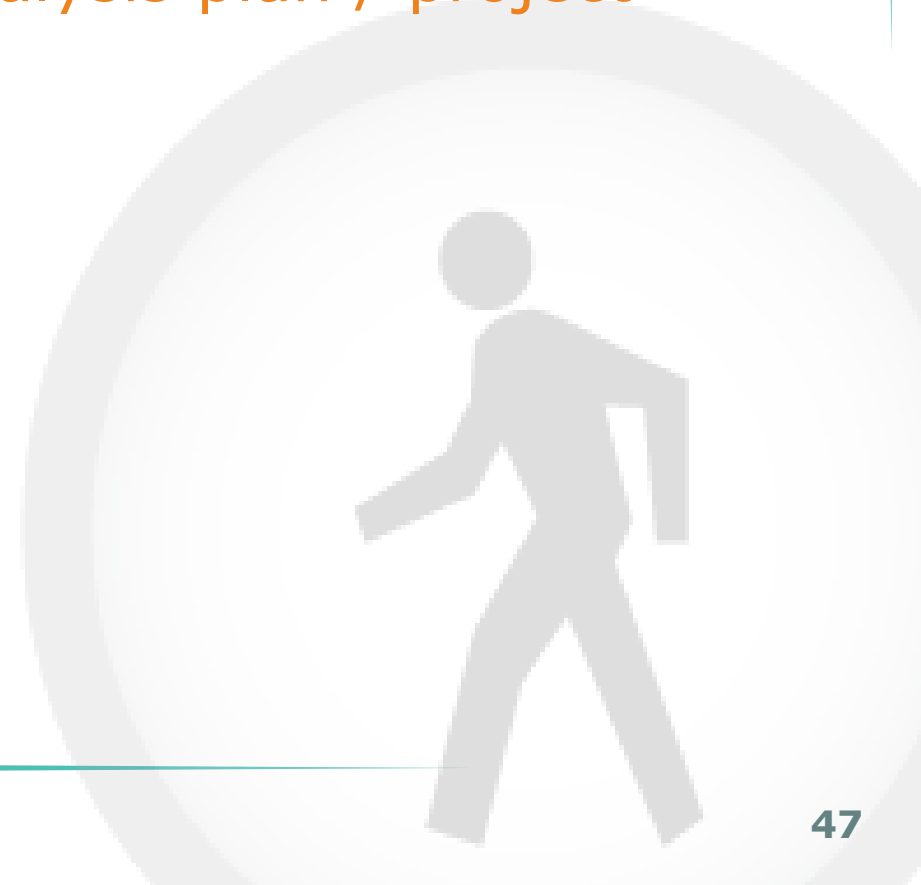
| type | name | label::English | appearance |
|--------------------------|----------|--|--|
| select_one grade | grade | What is the grade concerned? | |
| select_multiple attendee | attendee | What are the names of the children present ? | search('preloadchildren','contains','grade',{grade}) |

| | | | |
|------------|------|----------------|--|
| | A | B | |
| list name | name | label::English | |
| 0 attendee | id | name | |

| | | | |
|---|---------------------------|---|---|
| | A | B | C |
| 1 | id,name,grade | | |
| 2 | 1,Bach Deirdre,grade1 | | |
| 3 | 2,Bagnell Mercedes,grade1 | | |

Exercice

- 👤 Look at the Attendance XLSform and attached CSV, then import the forms and test the result
- 👤 Analyse the data also: do you think the analysis will correspond to your analysis plan / project requirements?

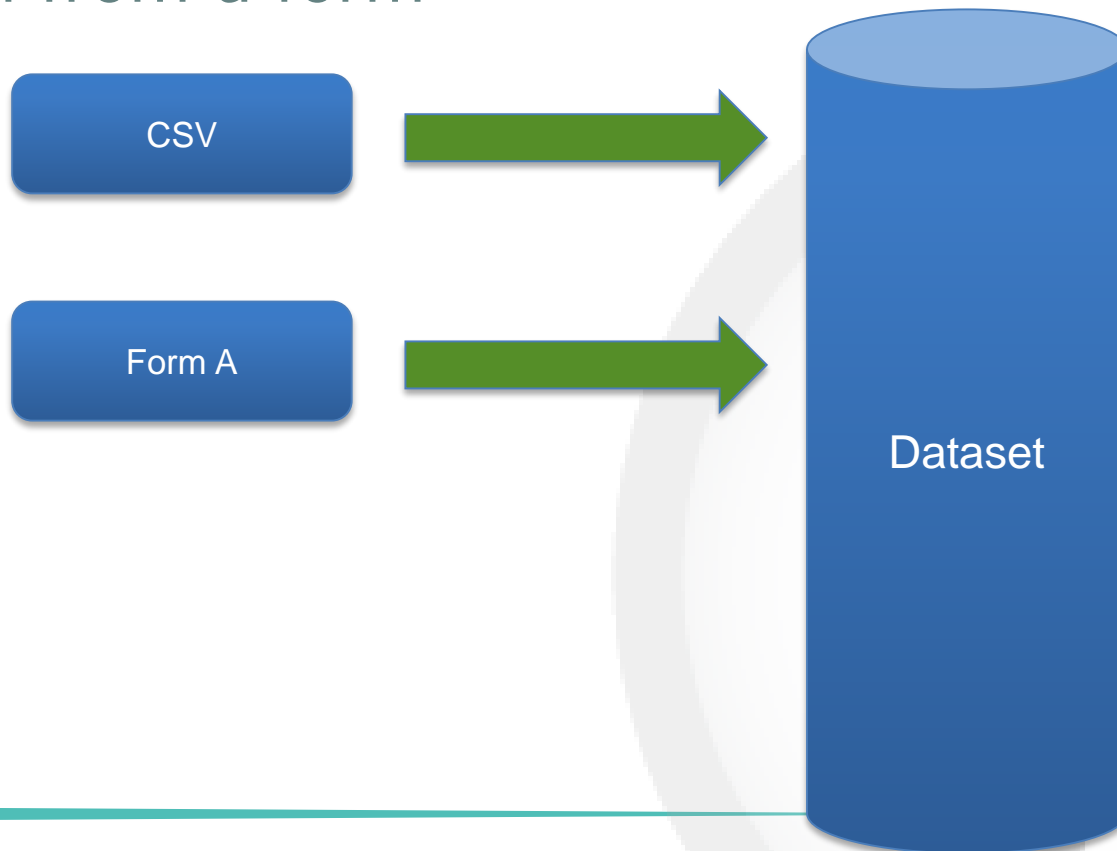


Server Datasets

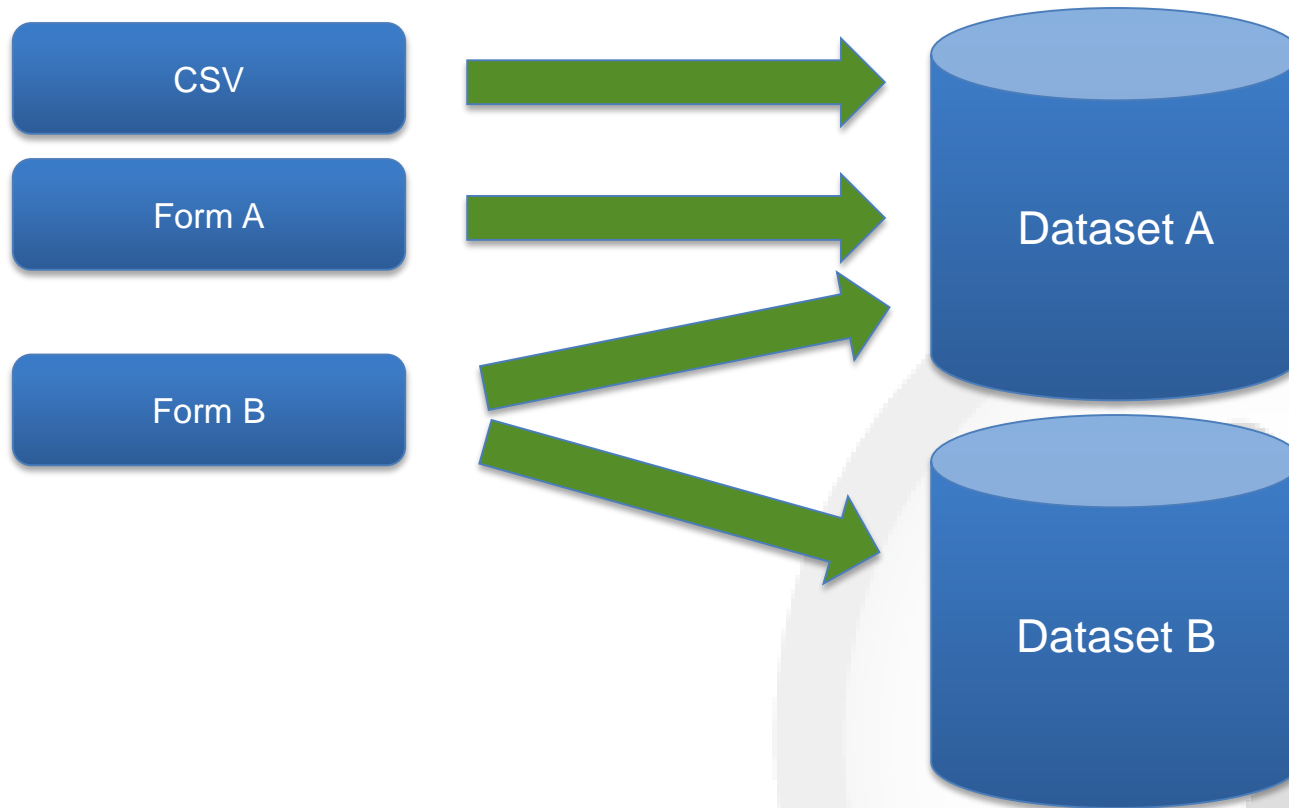
- ❶ Server datasets are an alternative to these CSV file attachments: they are data tables which can be *published to* and *pre-loaded from*
- ❷ Can be empty to start with or populated at any point by replacing, appending or merging in data
- ❸ They can be used to:
 - Transfer data between forms
 - Collate data from several forms or split data from a single form
 - Publish externally
 - Any combination of the above!

Server Datasets: Populating Them

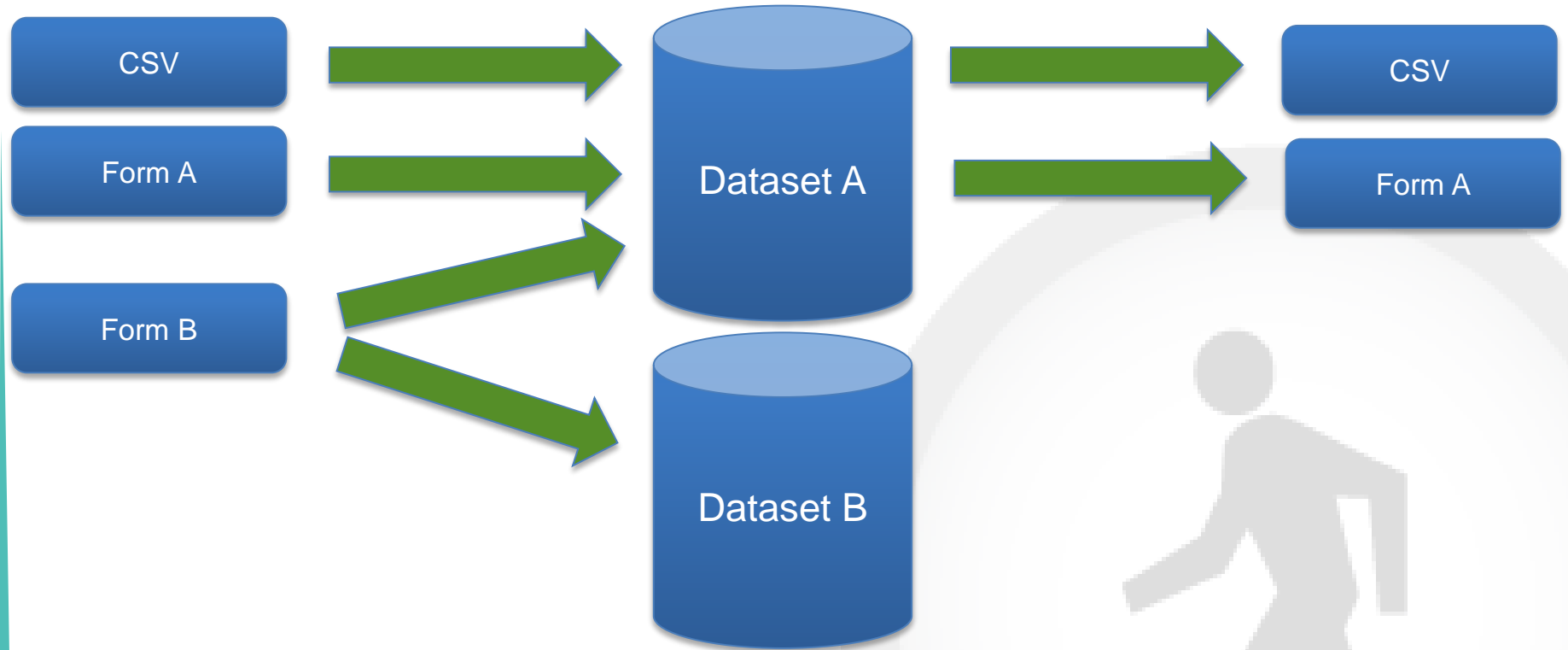
- 👤 Upload a CSV
- 👤 Publish from a form



Server Datasets: Publish to many destinations



Server Datasets: many layers

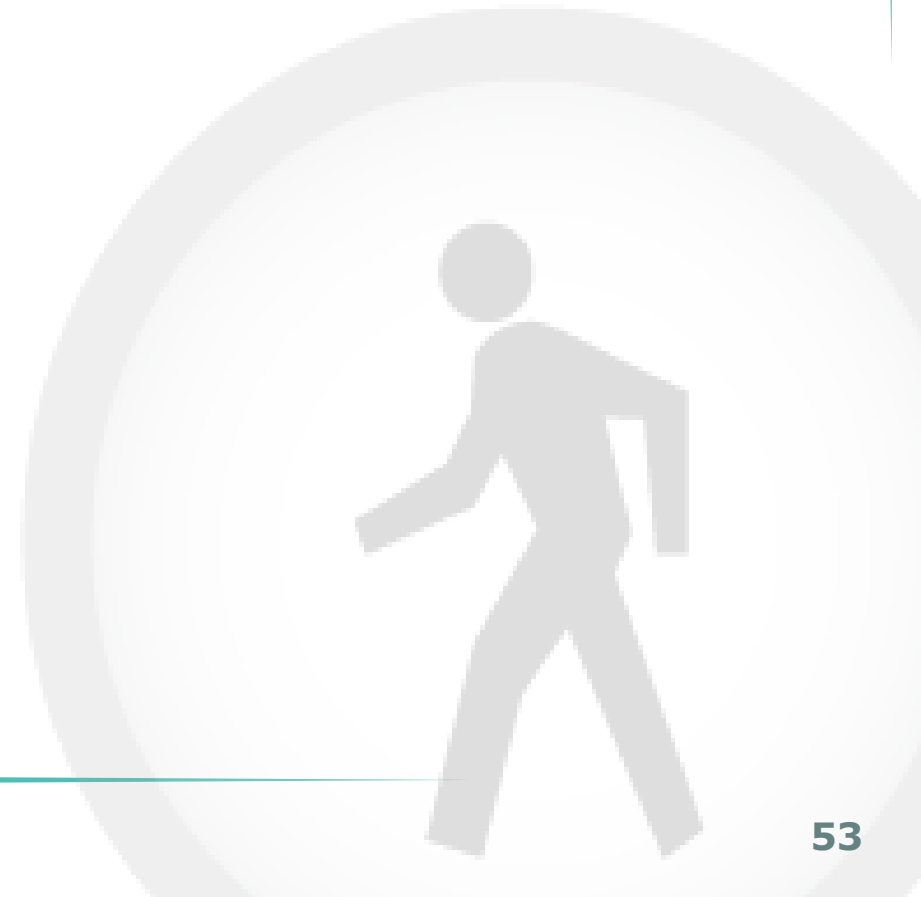


Server Datasets

- ❶ Simple in that:
 - Can't be queried
 - Can't be summarised in the system
 - Can't be used with the Data Explorer
- ❷ Encrypted fields can't be published in any way
- ❸ Datasets records can't be deleted automatically but they can be overwritten or manually edited

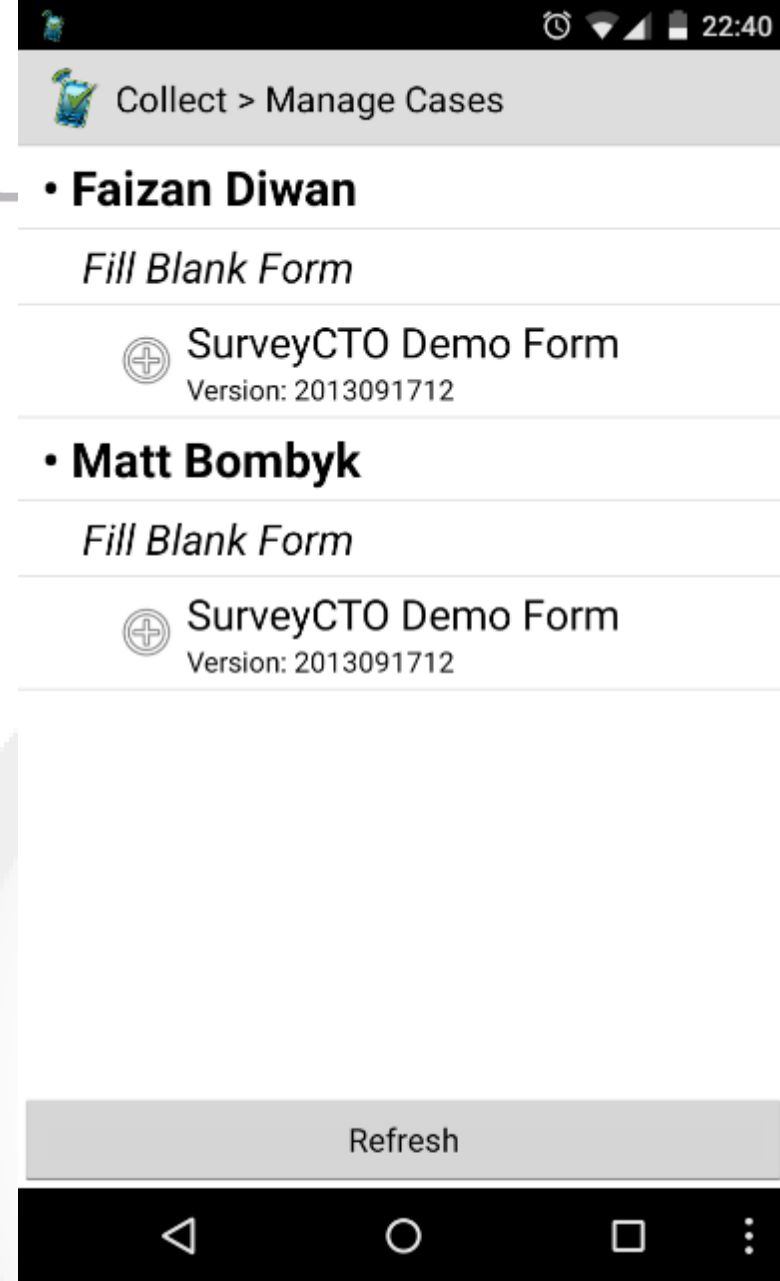
Exercice

- ❶ Let us create a server dataset for water tanks from a CSV
- ❷ And then create a form for the follow-up of water tanks



Case Management

- “Cases” is a particular type of Server Dataset, with which you can organise data collection around cases (people, households, boreholes)
- One case can have many forms associated
- Useful for longitudinal data collection
- Uses a unique “cases” dataset for defining cases
- Cases can be:
 - Pre-populated
 - Added through publishing
 - Updated through overwriting



The cases dataset


- Seeded through a CSV upload or filled directly online

The screenshot shows a web interface for creating a dataset. At the top, there are four buttons: 'Start new form', 'Add group', 'Upload form definition', and 'Add server dataset'. The 'Add server dataset' button is highlighted with a red box and a tooltip that reads: 'Create a server dataset for attaching data to a form, case management, or advanced data flows'. Below these buttons, there are three tabs: 'New dataset for data', 'New dataset for cases' (which is selected and highlighted with a red box), and 'New dataset from definition'. The 'New dataset for cases' tab has a sub-header: 'Create new cases dataset for case management'. The form contains the following fields and options:

- Dataset title:** A text input field containing the word 'Cases'.
- Dataset ID:** A text input field containing the word 'cases'.
- Show case list as:** A section with three radio button options:
 - ☒ Tree list (all cases and forms)
 - ☐ Table (all cases)
- ☒ Include finalized+sent forms?

Below the form, there is a text block: 'Your new cases dataset will automatically include the correct columns. To add rows for your cases, you can click to upload a .csv file or edit the dataset directly, once you've added it.' At the bottom right, there are two buttons: 'Cancel' and 'Create dataset' (highlighted with a red box).







The cases dataset


 Cases

AttachPublish intoEditUploadDownloadRenamePurge dataDeleteSettings

Dataset ID: cases, Version: 3, Records: 2

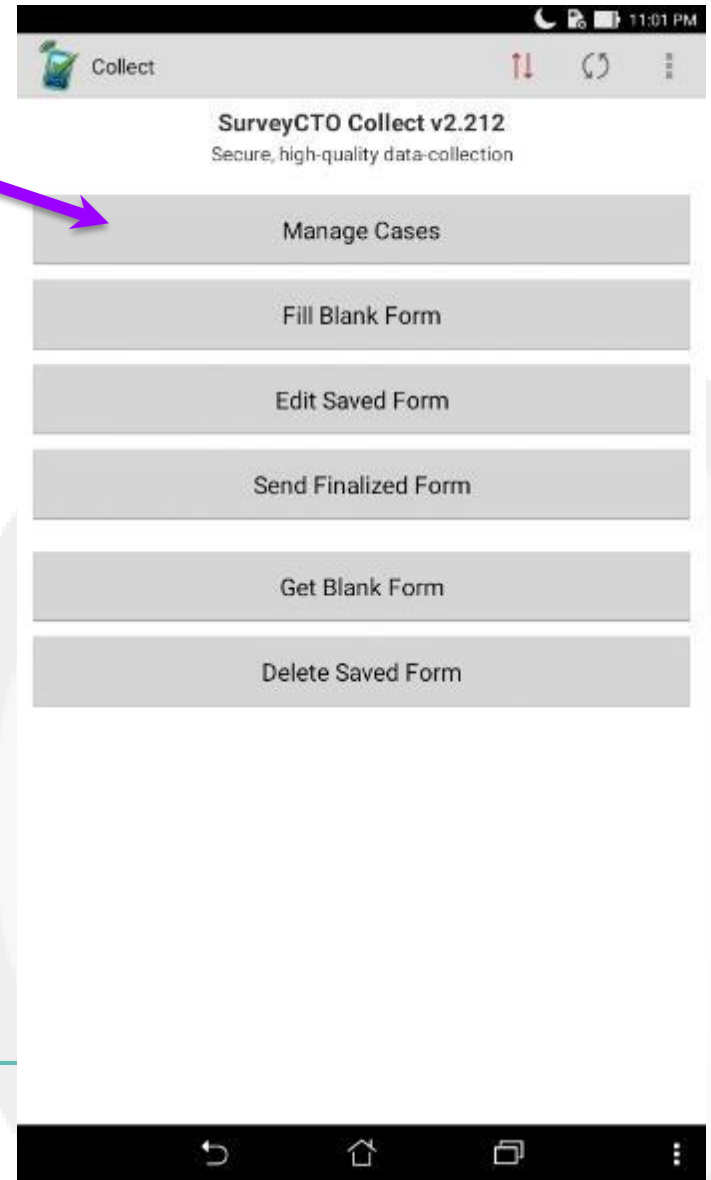
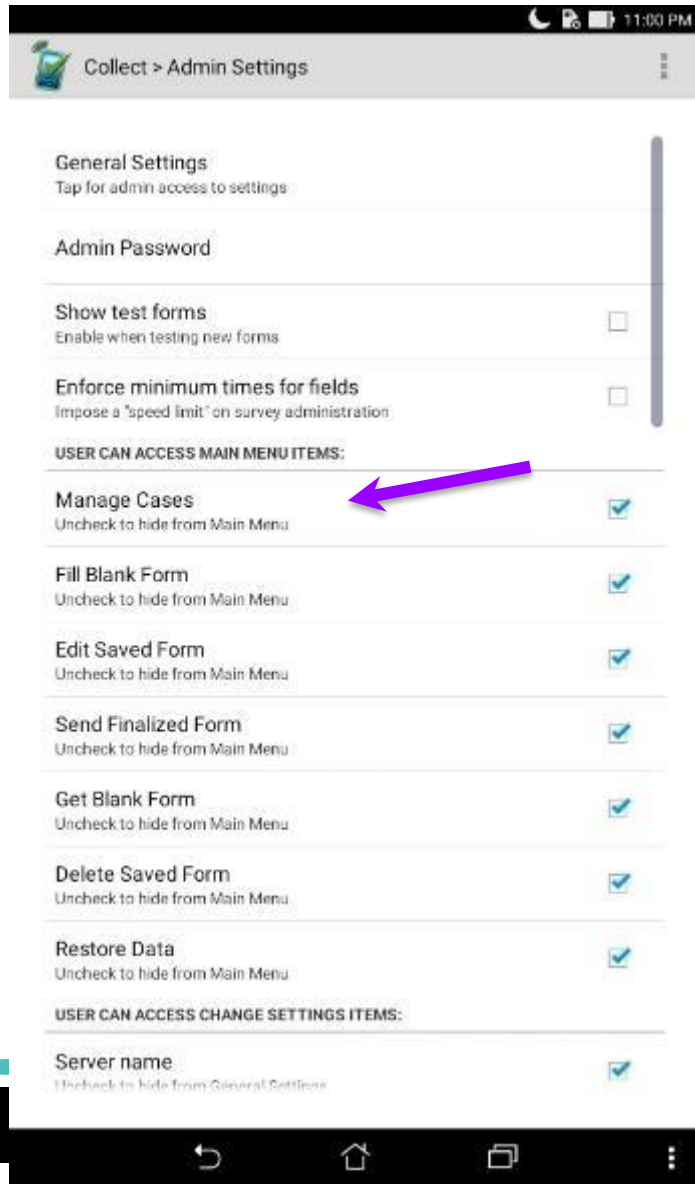
Edit dataset

| | id | label | formids | users | roles | sortby |
|---|------|---------------|-------------------------------------|-------|-------|--------|
|  Edit  Add  Delete | WTP1 | Water Plant 1 | renovation_task_1,renovation_task_2 | | | |
|  Edit  Add  Delete | WTP2 | Water Plant 2 | renovation_task_1,renovation_task_2 | | | |

 Add row

Close

Case Management on SurveyCTO Collect



Exercice



Add

- One case to the « cases » database (manually, one at a time to avoid conflict)
- one new renovation activity to the SurveyCTO project each



then test the Case management on SurveyCTO and fill in a few submissions



Analyse the data also: do you think the analysis will correspond to your analysis plan / project requirements?

End of session exercise

- ❶ Create a form on school identification (with 5 questions) either using XLSform or the online builder
- ❷ Make it publish into a dataset of schools of your making
- ❸ Set up two forms related to these schools:
 - One short one for the follow up of WASH risks in schools, covering such questions:
 - What type of student toilets/latrines are at the school?
 - How many girls toilets/latrines are currently usable?
 - How many boys toilets/latrines are currently usable?
 - One for the building of latrines, covering such questions:
 - How many latrines were built for girls
 - How many latrines were built for boys

Exercise

- ❶ Add to your forms :
 - 1 relevant speed limit
 - 1 text audit
 - 1 automatic quality check (in the « Monitor » section)
- ❷ deploy it and test it
- ❸ Publish the results:
 - of the follow up to a Google sheet
 - Of the Identification of risks WASH to Google Earth

Templates & a few advanced calculations



SurveyCTO templates

- Explore the surveyCTO templates
- Which ones do you think could be relevant to your needs?

Start new form - Step 1

Get started by giving your new form a title and unique ID, then click *Next* to continue.

Form title:

Enter the form's title, as it should appear to users. You can change it later.

Form ID:

Enter a short, unique ID for this form. It cannot include spaces or punctuation and you cannot change it later.

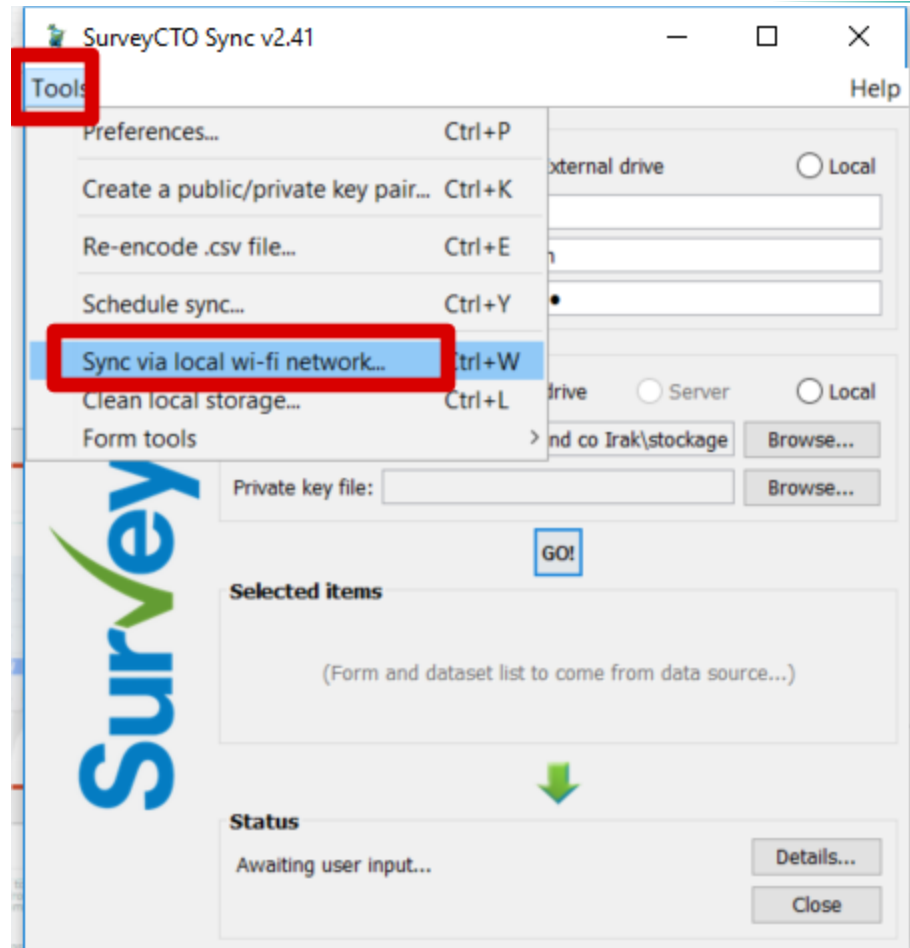
☒ Use a sample form as your starting point?

Select a sample you want to use as a starting point:

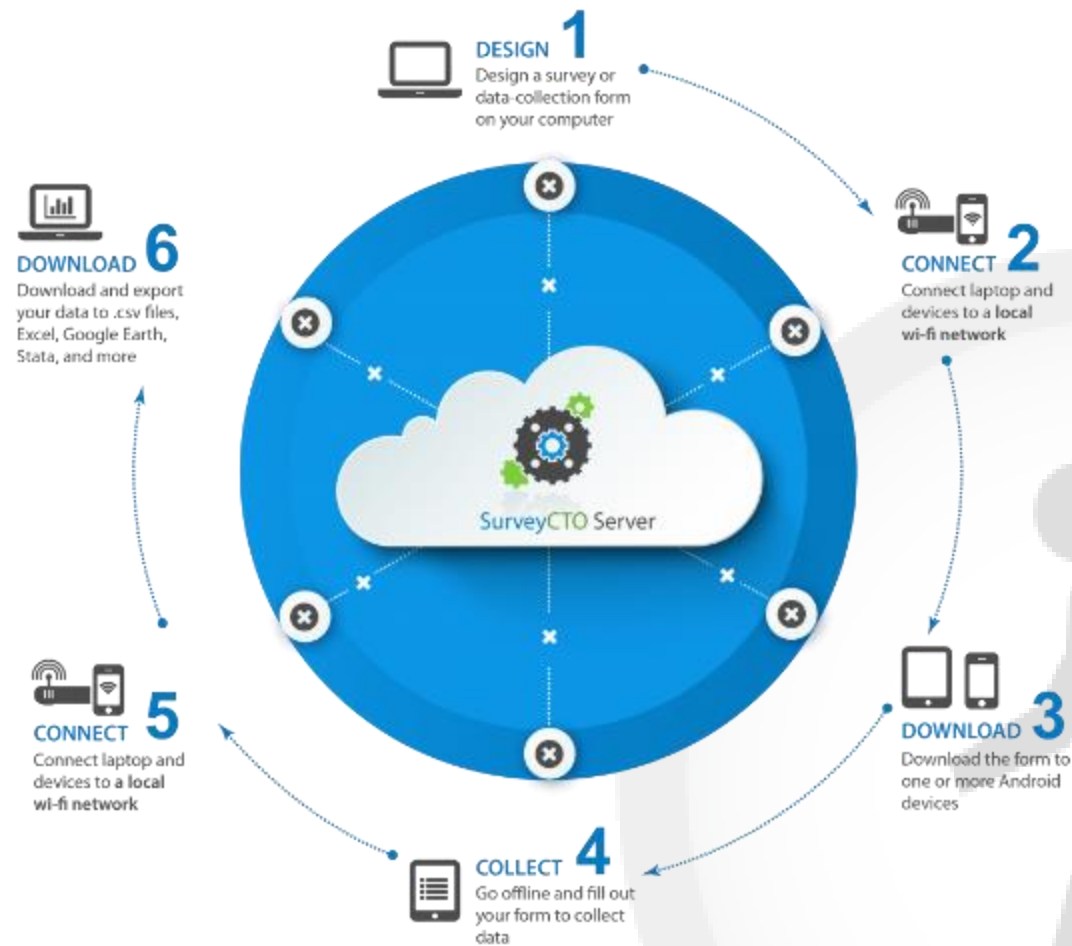
| | |
|---|----------------------|
| <input type="radio"/> The basics: Common elements in any form | View |
| <input type="radio"/> Languages: Including translations | View |
| <input type="radio"/> Randomization: Randomizing form elements | View |
| <input type="radio"/> Images: Adding pictures and other graphics | View |
| <input type="radio"/> Field lists: Multiple questions on a single screen | View |
| <input type="radio"/> Cascading selects: Filtering multiple-choice option lists | View |
| <input type="radio"/> Rosters: Two methods for repeated questions | View |
| <input type="radio"/> Rosters: A third, hybrid method for repeated questions (repeat_count) | View |
| <input type="radio"/> Rosters: Choosing among earlier entries (variation 1) | View |

Offline syncing

Offline Syncing



SurveyCTO's offline workflow:



Offline Syncing

- ❶ SurveyCTO's normal workflow requires connecting to the internet at least to sync updated form definitions from your cloud server to devices and to upload finalised submissions from devices to your cloud server
- ❷ Offline Syncing allows users to push form definitions via SurveyCTO Sync on a laptop to devices connected to the same Wi-Fi network (but no internet is required)
- ❸ And allows users to upload finalized surveys from devices to Sync on a laptop connected to the same Wi-Fi network (but no internet is required)
- ❹ In other words, SurveyCTO Sync installed can essentially act as a local server on a laptop- all you need is a wireless router to create an offline wifi!
- ❺ **Check out the SurveyCTO user doc "Operating more fully offline (without the internet)"**