

Creating Data Collection Forms

Data Collection: Form Design

Delta's **Data Collection Module** contains four functional areas: Create/Edit Form, Collect Data, Review Data, and Analyze & Report. Click the Data Collect icon in the left navigation to enter the module.

The screenshot shows the Delta Data Collection interface. The top navigation bar includes the Delta logo, the project name "Water and Sanitation Project", and user icons. The left sidebar contains navigation links: Home, Settings, Proj. Mgmt, Log frame, Data Collect (highlighted), Dashboards, Learning, and Admin. The main content area is titled "Data Collection" and displays a list of forms. The forms listed are: "CONDITIONAL LOGIC EXAMPLE" (created 2020-08-10 16:55:32), "TEST" (created 2020-08-04 22:31:21), "SAMPLE DATA COLLECTION FORM" (created 2019-09-17 19:56:31), "RECENSEMENT DES ÉLÈVES" (created 2019-02-06 16:13:43), and "PROJECT BENEFICIARIES" (created 2018-11-13 10:34:02). Each form entry includes a description and a "Display Image" button. A "+ Add Form" button is located at the top right of the list.

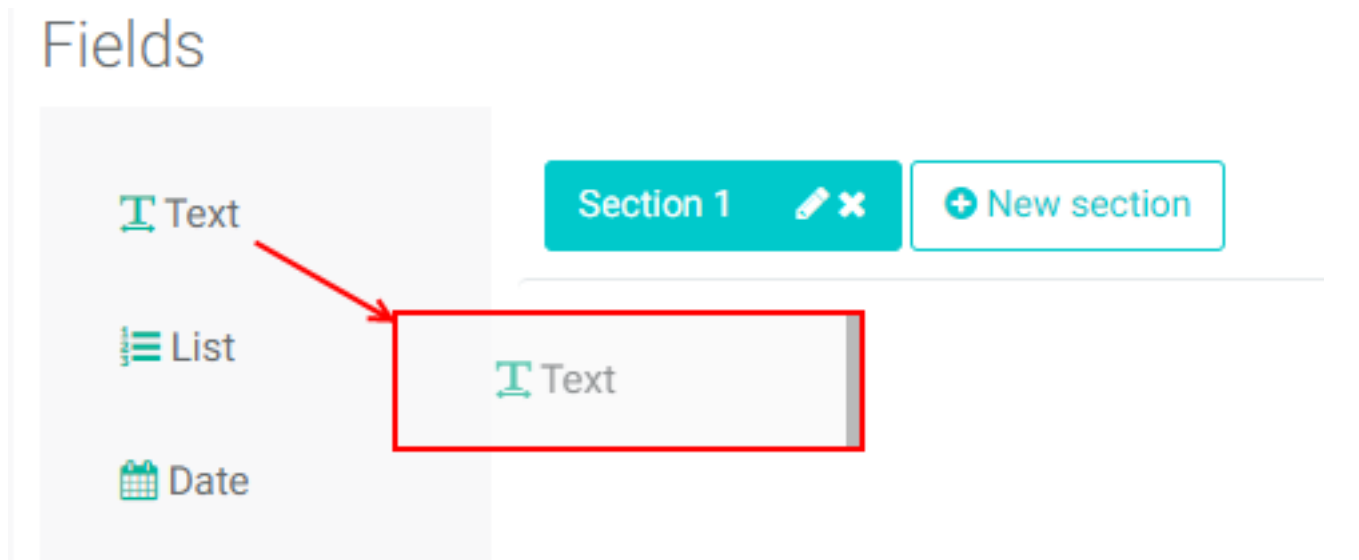
To **create a new form**, click the + Add Form button at the top right to bring up the **Form Design** screen.

The screenshot shows the Delta Data Collection Form Design interface. The top navigation bar and left sidebar are identical to the previous screenshot. The main content area is titled "Forms" and displays a form design canvas. The canvas includes a "Form Name" field, a "Description" field, and a "Fields" section. The "Fields" section contains a list of field types: Text, List, Date, Number, Choice, Score, Picture, Audio, and GPS coordinates. A "Section 1" button is visible, along with a "New section" button. The form design canvas is currently blank, showing only the field types and section buttons.

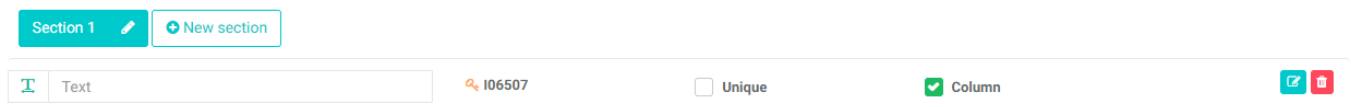
Enter a name for the form in the Name field.

To add a field of a particular type to the form structure, click, hold, and drag your selection onto the blank area of the screen.

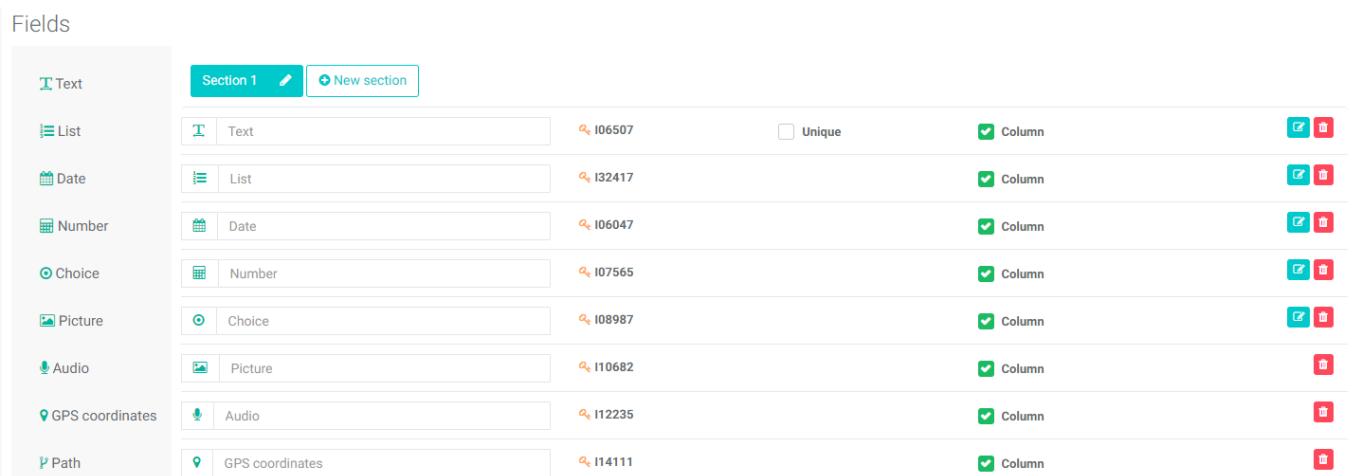
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Select the spot where you want to place the field, and release the selection. The field and its parameters appear on the page.



Each field type has its own parameters. Each also is automatically assigned a unique identifier by the system. This identifier appears to the right of the label of the field, along with a key icon, and always begins with the capital letter "I".



NOTE: make sure that you replace the placeholder text in the field name with an actual name for the field. If you do not, Delta will display the dataset with no headers (which is what the Column checkbox does, using the field name), or will use the field's unique key identifier as the header. Unique key identifiers and using conditional logic (skip logic) are discussed in detail in the article [Data Collection: Unique Identifiers & Skip Logic](#).

The first of the ten types of field is **Text**.

Enter the label of the text field. Checking the Unique box forces a unique entry into this field every time data is entered into the form during data collection. Checking the Column box will display the data from this form in columnar form during data review.

To configure the text field, click its Edit icon.

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Text

☐ Multi line

character Limit *

125

☐ Required

Condition

Set condition for the field

✓ OK

Check Multiline to allow more than one line of text to be displayed on the form. Enter the maximum numbers of characters allowed for this data entry (required). Check the Required box to make this data entry mandatory. Add a condition if appropriate, then click OK when you're done.

The **List** data field type allows you to add pick lists, parameters from the project settings, and other forms. After adding a List field to your form, click its Edit icon to further configure the field.

The first option, **List Options**, allows you to create pick lists in your form. Select List Options, then add the items to be displayed in the pick list. Click the Add button after each one. Check/uncheck the Required box, add a condition if appropriate, then click OK when you're done.

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List

List options

Pre-set Options

Forms

LIST OPTIONS

Enter an option

Add

Required

Condition

Set condition for the field

✓ OK

The second option, **Pre-set Options**, allows you to select a set of project parameters, such as geography list or log frame. Select Pre-set Options, then select the desired parameter. Check/uncheck the Required box, add a condition if appropriate, then click OK when you're done.

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List

☐ List options

☒ Pre-set Options

☐ Forms

☒ Units of measure

☐ Stakeholders

☐ Locations

☐ Log Frame

☐ KPI Disaggregation

☐ Required

Condition

Set condition for the field

✓ OK

Selecting Units of Measure will populate a pick list with the units of measure entered in the project settings. The pick list will appear in the data collection form when it's used.

Selecting Stakeholder will populate a pick list with the stakeholders from the project settings. The pick list will appear in the data collection form when it's used.

Selecting Locations will display all the project locations in a pick list. This option is useful in a couple of ways: it makes sure location names are consistent, and it also provides the GIS part of the system with the correct data for this particular dataset's geospatial visualization.

Selecting Log Frame will make all the log frame elements available in a pick list. This option is used to associate form data to a particular activity or indicator.

Selecting Disaggregation Categories will bring up a pick list from which you can select the project disaggregation category you want to use in the form.

The third option, **Forms**, allows you to select another form in order to incorporate it into the form you're creating. Select Forms, then select the form you want to use.

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List

List options

Pre-set Options

Forms

Project Beneficiaries

Recensement des élèves

Sample Data Collection Form

TEST

Required

Condition

Set condition for the field

✓ OK

A specialized use of the Forms option is linking baseline (static) with timeline (variable) data in the context of longitudinal studies.

The **Date** data field type is self-explanatory. After adding a Date field to your form, click its Edit icon to further configure it.

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Date

Format *

Aug 10, 2020

☐ Required

Condition

Set condition for the field

✓ OK

Select a date format from the pick list. Check/uncheck the Required box, add a condition if appropriate, then click OK when you're done.

NOTE: A typical use of this field is to enter the date the data collection took place. This allows the system to place the record in its proper reporting period. Date fields appear in the Period field of an indicator's [Populate With Data File](#) parameters.

The **Number** data field type is also straightforward. Its only parameter is the number of digits after the decimal point. After adding a Number field to your form, click its Edit icon to configure it.

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Number 

Format *

10.00 

☐ **Required**

Condition

Set condition for the field

 **OK**

Select the number of digits after the decimal point from the pick list. Check/uncheck the Required box, add a condition if appropriate, then click OK when you're done.

The **Choice** data field type allows you to quickly build pick lists for your form. After adding a Choice field to your form, click its Edit icon to further configure it.

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Choice



LIST OPTIONS

Add

☐ Allow multiple selection

☐ Required

Condition

Set condition for the field

✓ OK

Add the items to be displayed in the pick list. Click the Add button after each one. Check/uncheck the Allow Multiple Selection box, check/uncheck the Required box, add a condition if appropriate, then click OK when you're done.

The next field type is **Score**. This field allows you to add options for scoring an item, for example on a five-point Likert scale. This is especially useful for surveys. Enter each option and its score one at a time, clicking the + button after each one to save it. You may enter as many options as you need.

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Score Field



LIST OPTIONS

Excellent (5)



Good (4)



Neutral (3)



Mediocre (2)



Bad (1)



Option

Value

Option

0



☐ Required

Condition

Set condition for the field

✓ OK

The last four data field types, Picture, Audio, and GPS Coordinates, and Path, require no parameters.

The **Picture** field type has no configurable elements. It will appear as a More icon in the data collection form. Clicking the More icon will allow you to navigate to the location of an image to add it to the dataset. Supported formats include GIF, JPEG, and PNG. The field acts as a placeholder so the photo can be added after the record has been imported, for example a photo of a interviewed person.

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To **add a photo to an existing record** in a data collection form, click the name of the form you want to work with from the Data Collection module landing page, and either manually create a record or import data. Open the record you want to add the photo to, click the More (...) icon next to the title of the Photo field, and navigate to the image file you want to use. Click OK to confirm. The photo will appear in the form.

The screenshot shows the DELTA Water and Sanitation Project interface. On the left is a blue sidebar with icons for Home, Settings, Proj. Mgmt, Log frame, Data Collect, Dashboards, Learning, and Admin. The main area is titled 'SAMPLE DATA COLLECTION FORM' and has tabs for 'Edit Form', 'Collect Data' (selected), 'Review Data', and 'Analyze & Report'. Below the tabs is 'Section 1' with a red close button. It contains several fields: 'Name of Interview Subject' (text input), 'Photo of Interviewee' (with a red box around the 'More' icon), 'Audio of Interview' (with a 'More' icon), and 'Coordinates of Data Collection' (three input fields with values 45.522071, -73.561123, and 0, plus location icons). A 'Save' button with a green checkmark is at the bottom right. The footer shows 'Currently Connected: 1 User' and 'Copyright DELTA Monitoring & Evaluation ©'.

Graphic formats supported by the Photo field are: .xbm, .tif, .jpg, .jpeg, .jfif, .webp, .ico, .tiff, .bmp, .png, .jpeg, .svgz, .jpg, .gif, and .svg. Keep in mind that larger photo file sizes may slow down the system's display speed, so consider sampling down very large image files into smaller copies.

The **Audio** field type has no configurable elements. It will appear as a More icon in the data collection form. Clicking the More icon will allow you to navigate to the location of an audio recording to add it to the dataset.

Adding an audio file is similar to adding a photo. In an existing record, click the More (...) menu next to the title of the audio file, navigate to the location of the audio file, and click OK to confirm. The selected audio file will be available for playback in the audio player interface.

Audio formats supported by the Audio field are: .weba, .webm, .opus, .oga, .flac, .m4a, .ogg, .AMR, .wav, .mp3, .mid, .aiff, .wma, .au, and .aac.

The **GPS Coordinates** field type has no configurable elements. The GPS coordinates of the data collection site will be entered into the form automatically if the person using the form is in range of a network. GPS coordinates can also be added in after the fact, for example if data collection took place offline but the coordinates are known. The information in this type of field will inform geospatial visualization reports.

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The screenshot displays the DELTA Water and Sanitation Project interface. On the left is a vertical sidebar with icons for Home, Settings, Proj. Mgmt, Log frame, Data Collect (highlighted), Dashboards, Learning, and Admin. The main area is titled 'SAMPLE DATA COLLECTION FORM' and has a red close button (X) in the top right. Below the title are four tabs: 'Edit Form', 'Collect Data' (active), 'Review Data', and 'Analyze & Report'. The 'Collect Data' tab shows 'Section 1' with a red close button. The form fields include: 'Name of Interview Subject' (text input), 'Photo of Interviewee' (image upload icon), 'Audio of Interview' (audio player showing 0:00 / 0:00), and 'Coordinates of Data Collection' (a red-bordered box containing three input fields with values 45.522071, -73.561123, and 0, along with a location pin icon). A green 'Save' button is at the bottom right. At the bottom of the interface, it says 'Currently Connected: 1 User' and 'Copyright DELTA Monitoring & Evaluation ©'.

NOTE: the third coordinate of the GPS field is Altitude. The first two coordinates, Longitude and Latitude, are sufficient to correctly place the data record in spatial visualization reports.

The field can also be used as a location/geographic query when setting up an indicator to be populated by a data file, or added as a data layer in indicator geospatial data maps.

The **Path** field type has no configurable elements. Paths are a specialized GPS-based field which allows people in the field to note their coordinates at several points during traveling, for example while doing fieldwork in several successive locations. The geospatial visualization map for this type of field will display the trajectory taken by the user while performing data collection.

NOTE: these particular visualizations are very fine-grained, and you will most likely need to zoom in very close to see them on the map, as they typically only cover a few miles/km. They can also be added as a data layer in indicator geospatial data maps.

Each form structure screen can hold up to ten fields. If your form is longer, you can create as many form sections as required. Click the + New Section button to create a section. To edit the name of the section, click its Edit icon and enter the new name. Click the checkmark to save the name, or the X to cancel.



To reorder the fields, click and hold a field's icon (to the left of its label), and drag it up or down to another spot. Release the field in its new spot.

When you're done building the form, click OK at top right of the screen. The new form will appear in the list.

Previous: [Indicators: KPIs Results Framework](#) | Next: [Data Collection: Other Form Settings](#)

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