

Creating Data Collection Forms

Data Collection: Other Form Settings

There are several more tasks you can perform in this part of the Data Collection module once you've created a form. They are described below.

To **edit a form**, click its name in the list. This will bring up the Form Design screen. Make your changes, and click OK at top right to save your work and return to the Forms list page. The form will be timestamped with the day and time of the last edits.

 2020-08-04 22:31:21

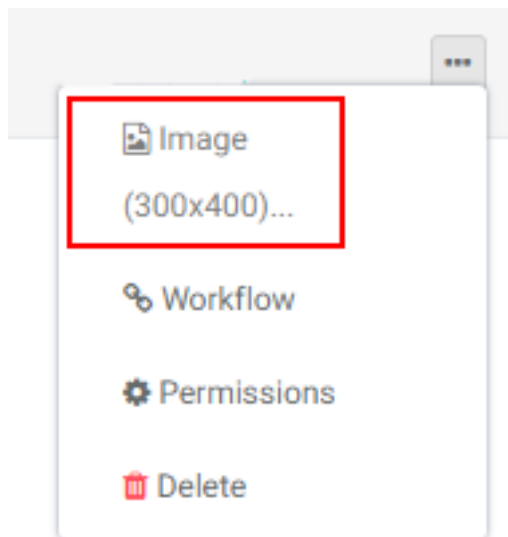
Delta now supports using data collection forms as surveys. Check the **Survey** box to mark your form as a survey. The article on [Collecting Data](#) describes in detail how to use this functionality.

☐ Survey ☐ Private

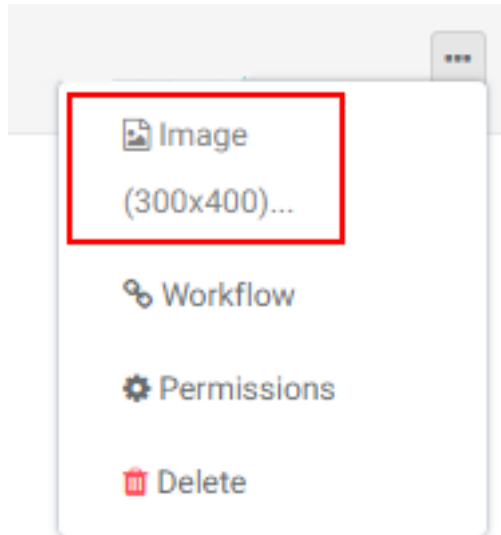
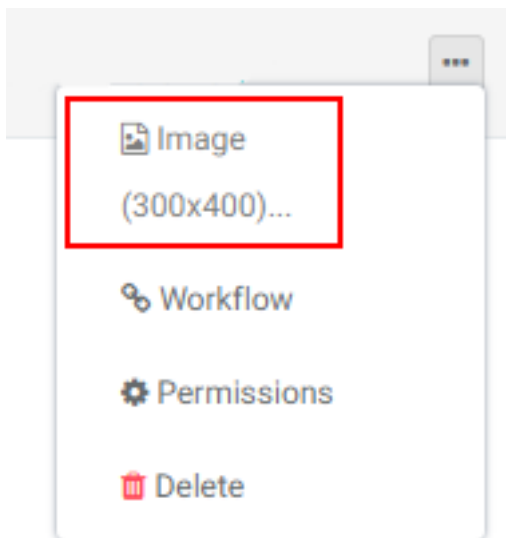
You can opt to make a form **private**. In practical terms, this makes the form invisible to all except the user who created it. This is useful if you create a form over several sessions and don't want anyone to use it before it's ready. Check the Private box at top right to keep your form hidden from other users.

☐ Survey ☐ Private

You can associate an **image** with a form. From the Forms list screen, select Image from the form's More menu.

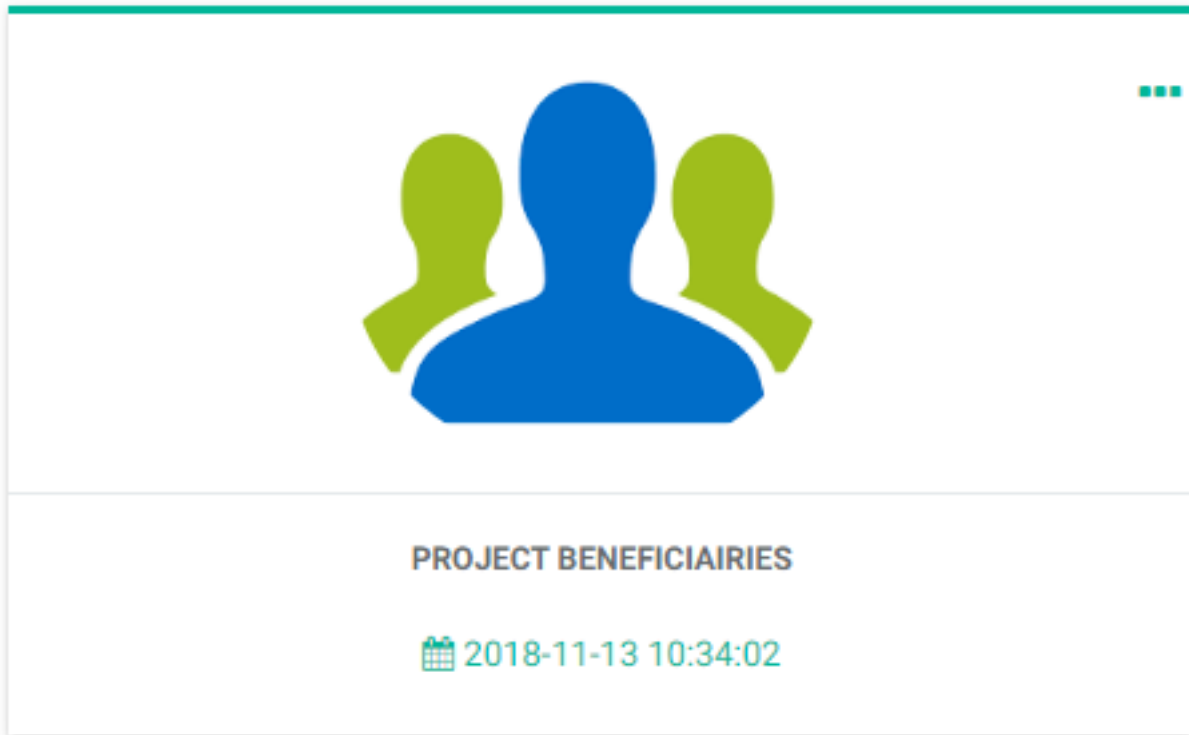


Creating Data Collection Forms



Navigate to the location of your image, then click Open or press Enter on your keyboard. The image will appear on the form tile.

Creating Data Collection Forms

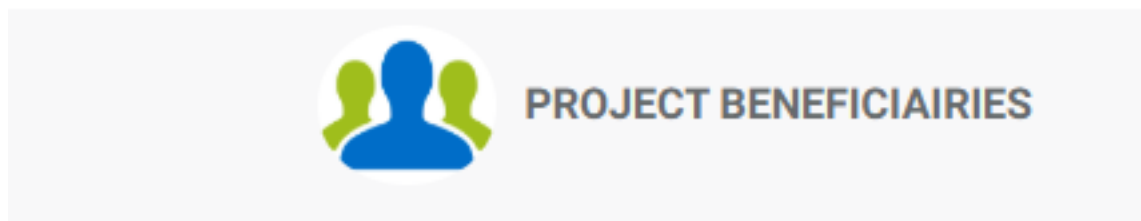


The image is displayed automatically in Tile view, but can be toggled on and off in List view.



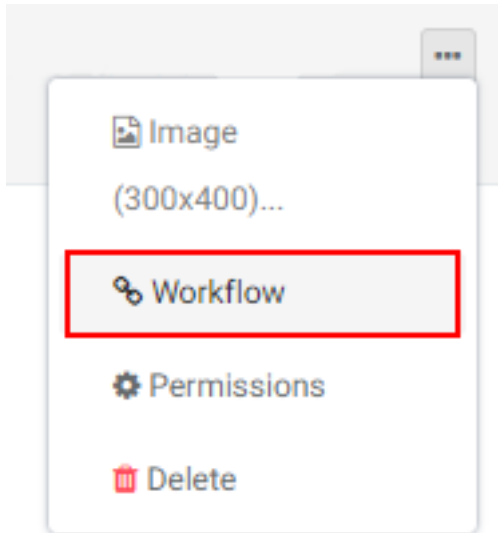
The image also appears at the top middle of the screen next to the form's name once the form is open.

Water and Sanitation Project



To **create a workflow** for a form, select Workflow from the form's More menu.

Creating Data Collection Forms



Click the Add button at top right to bring up the workflow popup window.

Workflow ✕

Name *

Color 

User *

Select User ▼

 **OK**

Enter the name of the workflow, and assign a user to it. Editing the color is optional. Click OK when you're done. The new workflow step is displayed as a tile on the screen.

Creating Data Collection Forms

The screenshot shows a 'Data Collection' interface. At the top, it says 'Data Collection'. Below that is a profile picture of a woman and the name 'TRAORE Mariam Evelyne'. To the right of the name is a green upward arrow and the number '1'. At the bottom right, there are two icons: a green pencil (edit) and a red trash can (delete).

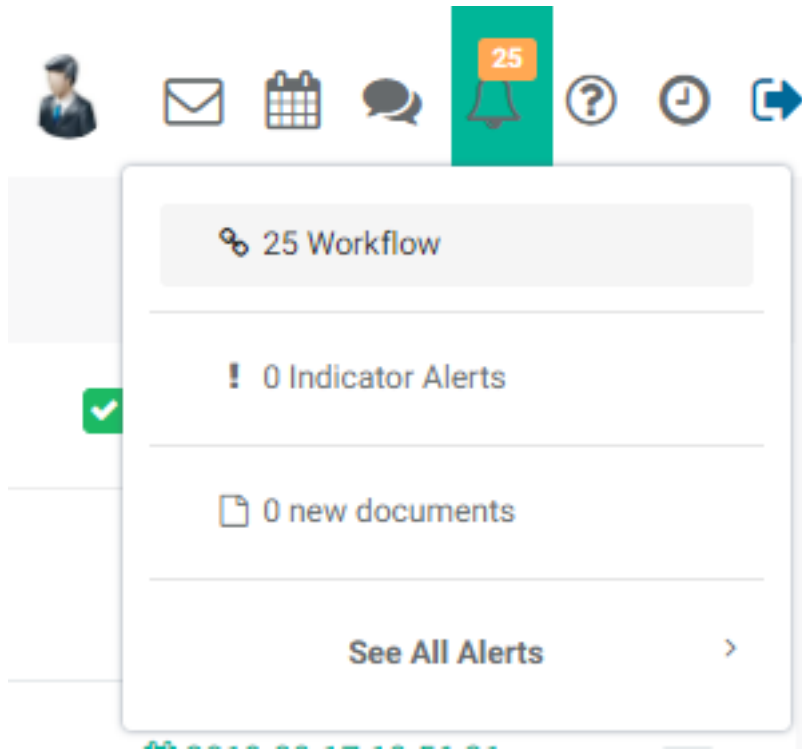
Create as many steps as are needed to complete the workflow for the form. Each step will feature a number reflecting its order in the workflow.

The screenshot shows the 'DELTA' application interface. The top bar includes the 'DELTA' logo, the project name 'Water and Sanitation Project', and a toolbar with icons for user, mail, calendar, chat, alerts, help, and settings. The main content area is titled 'Data Collection' and shows a 'Workflow (Beneficiaries of credit)' with two steps. Step 1 is 'Enter data' for 'TRAORE Mariam Evelyne' with a green upward arrow and the number '1'. Step 2 is 'Validate data' for 'DARAULT SERGE' with a green upward arrow and the number '2'. A sidebar on the left contains icons for Home, Settings, Proj. Mgmt, Log frame, Data Collect (highlighted), Dashboards, Learning, and Admin. The bottom status bar shows 'Currently Connected: 1 User' and 'Copyright DELTA Monitoring & Evaluation ©'.

To **edit a workflow step**, click its Edit icon, make your changes, and click OK to save your work and return to the Workflow screen. To **delete a workflow step**, click on its Delete icon. **NOTE:** you can only delete the last step of a workflow. Once it is deleted, the previous step becomes the last and can then be deleted.

Users who are selected to be parts of a workflow will receive a notification in their Alert icon in the Main Toolbar.

Creating Data Collection Forms



Click the Alert icon to view your assigned items in the system

A screenshot of the DeltaGIS Form management interface. The 'Form' tab is selected and highlighted with a red box, showing '25' pending items. Below the tabs is a 'Select a form' dropdown menu with 'Project Beneficiaries' selected. A table lists the form's records with columns for Photo, Name, Gender, and Village. Each row has a checkbox in the right margin.

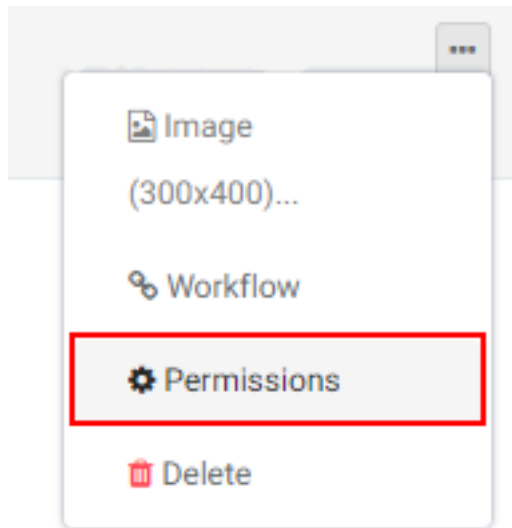
Photo	Name	Gender	Village	
	Mutambayi Clarisse	Female	K3020100 - Suba	☒
	Chumba Sophie	Female	K4020200 - Mara	☒
	Chirchir Augustine	Male	K3020200 - Teso	☒

NOTE: in the example above, 25 notifications were created because the data collection form has 25 existing records in it. Regardless of where you set up workflows in Delta, the system will create every instance of an alert. In this case, the recipient of the alerts indeed saw 25 tasks pending in the Workflow section of the Alerts space.

Note also that notifications for a project will only appear once the user has clicked on the project to open it.

To **assign permissions** to a form, select Permissions from the form's More menu.

Creating Data Collection Forms



The Permissions screen will appear. **NOTE:** Only regular users will be shown in the list at left. Superusers do not appear on this screen since they have explicit permissions to the entire system.

A screenshot of the DELTA Water and Sanitation Project interface. The top bar shows the DELTA logo, the project name 'Water and Sanitation Project', and several utility icons. A left sidebar contains navigation links: Home, Settings, Proj. Mgmt, Log frame, Data Collect, and Dashboards. The main content area is titled 'Data Collection' and 'Permissions (Project Beneficiaries)'. It features a table with columns for 'Users', 'MetaData' (View, Edit / Delete), and 'Data' (View, Edit / Delete). The table lists five users: TRAORE Marie Jeanne, [redacted], [redacted], BROU Serge, and test SISSAO. Each user has checkboxes for the four permission categories. An 'OK' button is at the bottom left of the table area.

Users	MetaData		Data	
	View	Edit / Delete	View	Edit / Delete
TRAORE Marie Jeanne	☐	☐	☐	☐
[redacted]	☐	☐	☐	☐
[redacted]	☐	☐	☐	☐
BROU Serge	☐	☐	☐	☐
test SISSAO	☐	☐	☐	☐

A form's **metadata** is its structure. Those permissions allow a user to make changes to the form itself. The form's **data** is the dataset of information collected using that form. Those permissions allow working with only form data.

For each user, select the permissions you want to grant. Click OK when you're done.

To **delete a form**, select Delete from the form's More menu, then confirm the deletion. **NOTE:** all data contained in the form will also be deleted.

Previous: [Data Collection: Form Design](#) | Next: [Data Collection: Unique Identifiers & Skip Logic](#)

Unique solution ID: #1086

Author: n/a

Last update: 2023-07-01 21:28