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Form authoring and data collection
Authoring XLSForms

- Author your forms in Excel with XLSForm syntax
- XLSForms support:
  - Multiple languages
  - Locations (geopoint, geoshape, geotrace)
  - Signatures
  - Multimedia (images, audio, video)
  - Data validation checks
  - Skip logic
  - Calculations
  - Repeats
  - Cascades

Learn XLSForm syntax at www.xlsform.org
Add a form to make it available for data collection
Uploading forms

- Upload XLSForms from:
  - Your computer
  - An external downloadable URL (e.g. Google Sheets)
  - Dropbox
Collect data with any Android smartphone or tablet using ODK Collect or with Enketo webforms on any modern web browser (e.g., Chrome)
ODK Collect configuration

- Use https://odk.ona.io to configure ODK Collect server settings
- Enter your Ona username and password to download forms to your device and submit data
Collecting data in ODK Collect vs. Enketo

**ODK Collect**

- Works on Android devices only
- One questions per screen
- Barcode scanning, drawings and signature input
- Phone-specific metadata questions (subscriberid, simserial, phonenumber)

**Enketo**

- Works on any modern web browser in mobile devices or computer
- Full-form-as-one-page mode
- Only supports submission time

Both work offline, can launch form, collect and save data without internet or data connection.
Form authoring and data collection Q&A

“Additional functionalities of ONA like if possible calculation of area using geoshape and geotrace.”

“How to upload information in the Ona system, How it supports Open data kit, Interpreting data”
Data management
What are projects?

- Projects provide a means of organizing forms + data. Similar to a folder.
- Both organization accounts and personal accounts can have projects.
- Permissions for forms are set at the project level.
- Projects can be public or private.
Forms are stored within projects.

Permissions are project-based, allowing quick and secure sharing between users.
Role-based permissions

- Several people can work on the same project.
- Assign permission levels to other Ona users.
- Ensures secure sharing & collaboration, only specific people have access to forms and data.
## Role-based permissions

<table>
<thead>
<tr>
<th>Permission</th>
<th>Can view</th>
<th>Can view and download</th>
<th>Can submit</th>
<th>Can edit</th>
<th>Is admin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can view data in a map</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Can view data as summary charts</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Can view data in a table</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Can preview forms</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Can download forms</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Can download data</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Can submit data</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Can edit data</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Can change the project share settings</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can add, delete, replace or make forms inactive</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can edit project metadata</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can delete the project</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can transfer project ownership to another user or to an organization</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td></td>
</tr>
</tbody>
</table>
Advantages of role-based permissions

- **Data security** - control who can access your forms and data
- **No sharing of usernames and passwords**
- **Tagged submissions** - each form submission is tagged with the data collector’s username
- **Easy configuration of devices** - same URL configuration used across devices
Public and Private Projects

Public
Visible and findable by anyone.
Note: All forms and data in the project are public.

Private
Only accessible to the project owner and collaborators they choose.
What are organizations?

- Organizations provide a way of managing people, projects and data together.
- Organizations have members.
- Projects and their data are owned by organizations.
- Securely manage data across projects and multiple users.
# Org members

[Image: Screenshot of the Org members section in Ona]

## Add members using Ona usernames & assign roles

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Projects</th>
<th>Role</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matt Berg</td>
<td>2</td>
<td>Admin</td>
<td>Remove</td>
</tr>
<tr>
<td>Beta Tester</td>
<td>3</td>
<td>Member</td>
<td>Remove</td>
</tr>
<tr>
<td>Ona Support Team (you)</td>
<td>1</td>
<td></td>
<td>Leave</td>
</tr>
<tr>
<td>Carolyn Gulas</td>
<td>0</td>
<td>Project Manager</td>
<td>Remove</td>
</tr>
<tr>
<td>Roy</td>
<td>0</td>
<td>Member</td>
<td>Remove</td>
</tr>
</tbody>
</table>
Org members vs. Project collaborators

Org members

- Only have 3 roles: Admin, Project Manager & Member
- Must be added to the org member list
- Have access to org projects

Project collaborators

- User outside the org that gets a project shared with them on a project by project basis
- Have various permission levels
- Cannot access other projects in org not shared with them
Project collaborators

Collaborators (someone outside of your organization) are denoted with a C next to their username

Judith Stegemann · judith
Demo User · demome
Leigh Jaschke · ljaschke
Prabhas Pokharel · prabhasp

Admin
Can view and download
Admin
Organization projects

Org projects can be created by an **Org Admin** or **Project Manager** only.
Organization projects vs. Individual projects

**Org projects**

- Can have multiple Admins
- Has a group permission level for org admins and members
- Forms within an org project don’t appear in ODK Collect form list, unless they’re specifically added to the project with **Can submit** or higher permission level

**Individual projects**

- Has only one Admin
- No member-level permissions
Filtered datasets

Select the fields you want to show

All fields must be selected to enable editing of data in a filtered dataset. Learn more

<table>
<thead>
<tr>
<th>#</th>
<th>Name</th>
<th>Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>name</td>
<td>Name:</td>
</tr>
<tr>
<td>2</td>
<td>email</td>
<td>Email:</td>
</tr>
<tr>
<td>3</td>
<td>country</td>
<td>Country</td>
</tr>
<tr>
<td>4</td>
<td>ona_user</td>
<td>Are you currently using Ona?</td>
</tr>
<tr>
<td>5</td>
<td>use_ona</td>
<td>What are you planning to use Ona for?</td>
</tr>
<tr>
<td>6</td>
<td>learn</td>
<td>What do you want to learn more about Ona?</td>
</tr>
<tr>
<td>7</td>
<td>meta</td>
<td>meta</td>
</tr>
<tr>
<td>8</td>
<td>InstanceID</td>
<td>InstanceID</td>
</tr>
</tbody>
</table>

1. Select Fields
2. Add filters
3. Confirm and Save
Filtered datasets

Add filters

Show only records with specific answers. On the data table, this means showing only specific rows that match the filters below.

Are you currently using Ona? (var: ona_user) Equals Yes

Add filter

1 Select Fields 2 Add filters 3 Confirm and Save
Data visualization and analysis
Exporting data

Export data in CSV, XLS, JSON, OSM, and KML formats
Improved data visualization

Map

Table

Charts

Easily switch between map, table, and chart views
Mapping with filters

29. Are shops in this area open after day light?

- Yes always, (95)
- Yes sometimes (23)
- No (4)
- Never (2)
- No Answer (106)
Custom map colors

Choices Sheet
- Add appearance column
- On choice: add color: *name of color* e.g. color: orange.
Custom Basemaps

Add basemap to Kenya prim school survey
18feb2015

Map Provider: Map Box
Map ID: hot
Name: Humanitarian OpenStreetMaps Tile
Attribution: Op

Save  Cancel
Charts and dashboards

- Create bar and pie charts of your data
- Simple disaggregation by variables
- Download to computer or save to dashboard
Integrations
Google Sheets

- Support for google export is on the way - in the next 2-3 weeks.

- New submissions, edits and deletes would be reflected on the google spreadsheet.

- It should be possible to generate charts, pivot table from these which would be updated in realtime.
Load ona.R library.

```r
library(ona)
```

Download the form with id_string `amharic_tutorial` from the account `ukdemo` using the username `ukdemo` and supplying the password.

```r
tutorial <- onaDownload('amharic_tutorial', 'ukdemo', 'ukdemo', 'demo')
```

Initialize a data frame and get the time difference in the date field.

```r
tutorial_frame <- data.frame(tutorial)
max(tutorial_frame$date) - min(tutorial_frame$date)
```

```r
## Time difference of 478 days
```
- Send survey submission
- Use “Split by Expression” to determine flow
- Send notification via email or SMS to a contact or a group
Dashboards

- Rest Service: external host receives JSON submission when a submission hits ona.io
  - http://mspray.onalabs.org
- Ona API: https://api.ona.io/api
  - http://mapyourworld.org/
- Elasticsearch/Kibana
- Tableau - tableau.com
  - http://nor-som.onalabs.org/#/npa-boreholes
QA and Resources

- ona-community@googlegroups.com or https://groups.google.com/forum/#!forum/ona-community
- Support Email: support@ona.io
- Ona help site: https://help.ona.io
- API documentation: https://api.ona.io/static/docs/index.html
- XLSForm authoring documentation: http://xlsform.org
- https://gist.github.com/ukanga/292e9b65b0f417a597cabb5510dcfd59