

# Creating a Data Collection Form with EpiCollect5

## Reference Guide for Creating Field Surveys

Epicollect5 is a free web-based tool that enables you to collect customized data (including location and media) in the field using a mobile device. You can easily create a data collection form that can then be opened on a tablet or smartphone by anyone you share it with to collect data in the field (whether online or offline). You can then view, analyze, display, and export that data.

After reading this guide you should be able to:

- Design a data collection form on the Epicollect5 website,
- Share your data collection form with others, and
- Access your form from the Epicollect5 mobile app.

### Epicollect5 Basics

The Epicollect5 website can be found at <http://five.epicollect.net>.

To download the mobile app, search for “**Epicollect5**” in the Apple or Android app stores.

Epicollect5 has set up a Google community for the discussion of issues related to the application. It is a great place to ask or search for answers to any questions you may have about how Epicollect5 works. Go to <http://plus.google.com/communities> and search for “Epicollect5” to view and/or join the community.

### Login to Epicollect

1. Go to the Epicollect website at: <http://five.epicollect.net>.
2. Click on “**login**” in the upper right.

**Note:** you will need a Google login and password to create your own forms in Epicollect5. If you do not have one, go to <http://accounts.google.com> to set one up.

3. On the login page, select “**Sign in with Google**” and enter your Google login and password in the window that opens.

Note: the non-Google user login is only for a select group of Epicollect beta users. It is NOT open to the public and you cannot create an account.

4. Notice that once you are logged in you will have new options at the top of the page – “My Projects” and “Create a Project.”



## Create an Epicollect5 Form

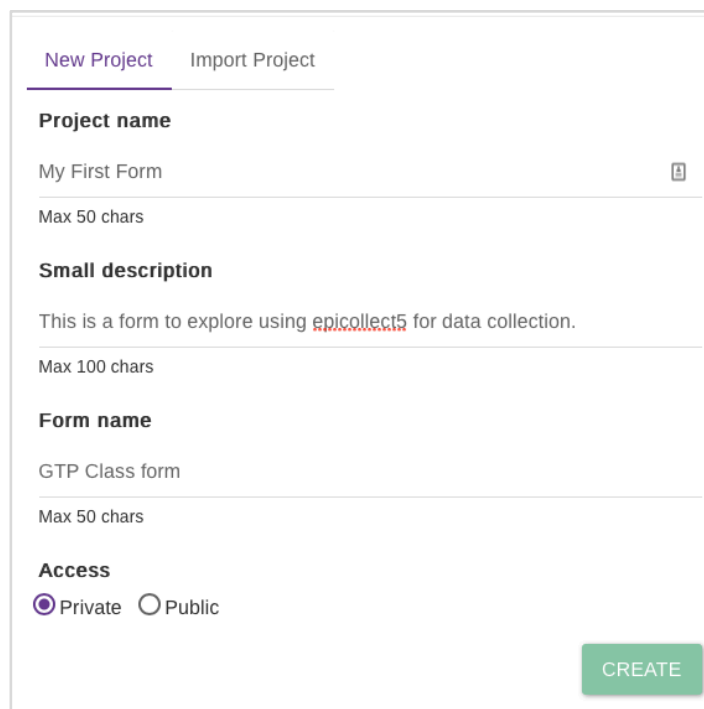
### Create a Project

1. To begin creating your own data collection form, click on “**Create Project**” at the top of your screen.



2. In the window that opens enter a project name, description, and form name. Use the suggestions in the graphic below or create your own.

**Note:** that the project name has to be unique. You cannot use a name someone else has already chosen. So instead of “my” below use your name.



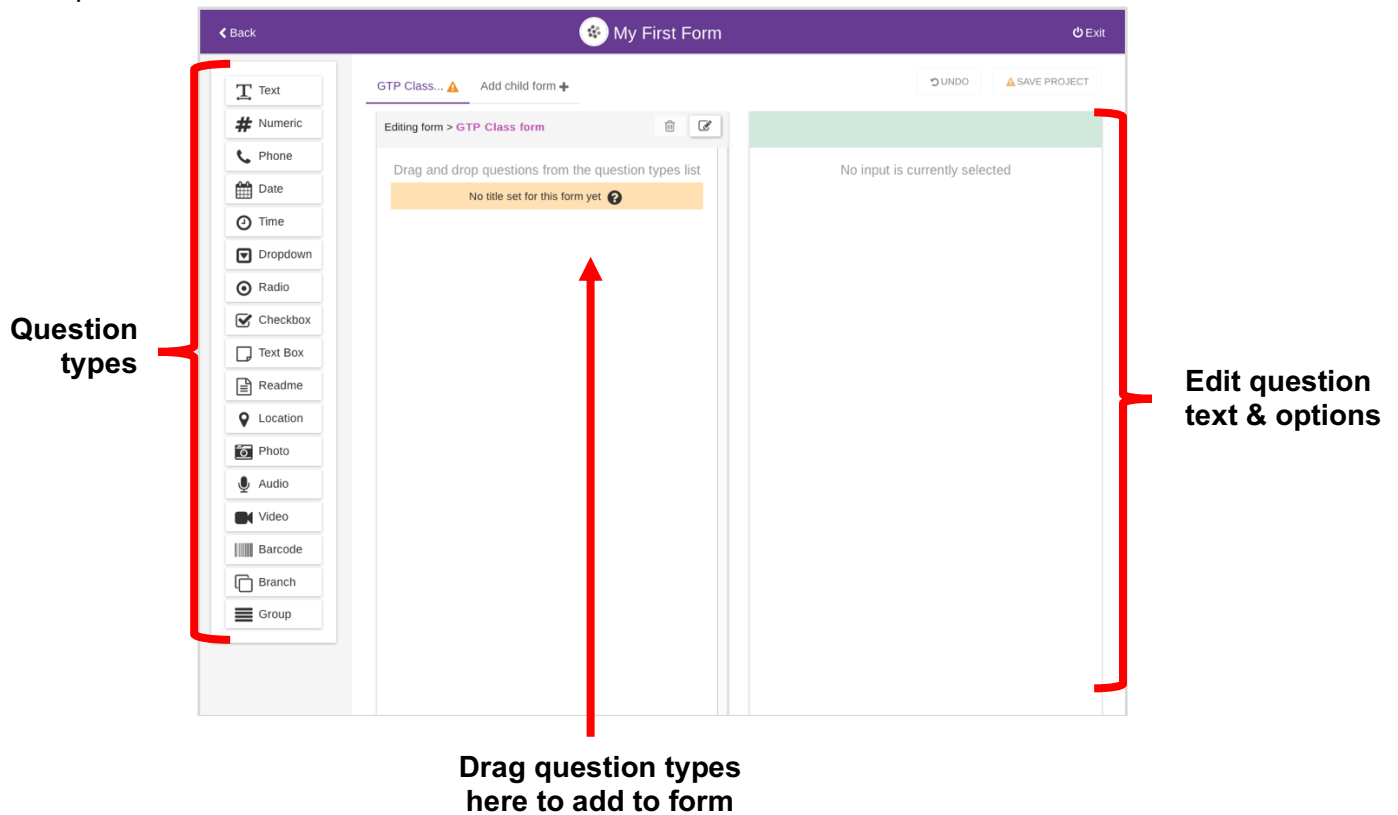
3. You can set access as either “Private” or “Public”. Private means the project is only accessible by you and those you specify, Public means anyone could access your project data. This setting can be changed at any time.
4. Click “**Create.**”
5. In the window that opens, select “**OK, open formbuilder now.**”



OK, OPEN FORMBUILDER NOW

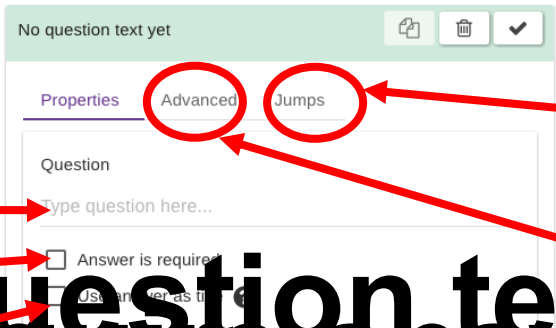
## Design Your Form

Take a moment to familiarize yourself with the Epicollect formbuilder. The graphic below should help:



### Add fields:

1. In the far left column **click and hold** on the type of field/question you would like to add to your form/survey and drag it to the middle column. This will add it to your form.
2. You can customize that field/question in the far right column. See diagram on Page 5 to understand your question options.



No question text yet

Properties **Advanced** Jumps

Question

Type question here...

Answer is required

Use answer as title

Skip questions based on response

Set response as title

Require answer

Question text

for point

Typing in a question prompt is a requirement. This will be what a user sees on the mobile form to provide the information requested. For example, if you choose a date field, the question might be, **“What is the Date?”**

4. To require a person to answer a question (i.e. the question can not be skipped or left blank), select the **checkbox** next to “answer required.”
5. If you want a particular question’s response to serve as to the overall title for that entry, **select use answer as title**. You can select up to 3 answers to serve as the title. This could be the date information was collected, the person who collected it, or some other information.
6. The **advanced tab** in the right column allows you to set other requirements for your question. The options will vary by question type. For example, for a date question you could select the format you would like the user to enter the data in. You can also select a default value for a question.
7. You can use the **Jumps tab** to allow users to skip questions based on the response to a particular question. For example, if you ask a multiple choice question, the next question could be different based on the user’s answer. See the section below on setting up Jumps.
8. Once you have completed all of the necessary settings for a particular question, you will see the title of your question in the center column. It should have a **green check** next to it. This means all of the necessary settings have been provided. If not, there will be an orange triangle with an exclamation point.
9. Explore the graphic below to see **what each question type does**:

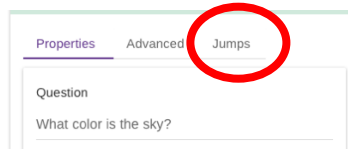


Type	Description
Text	A simple text input
Numeric	An input which allows only numbers (integer or decimal), it will use a numeric keyboard layout on the mobile device
Phone Number	An input which allows only numbers, it will use a phone keyboard layout on the mobile device
Date	An input to enter a date, it will use a date picker on the mobile device. <b>The value stored is timezone independent.</b>
Time	An input to enter the time, it will use a date picker on the mobile device. <b>The value stored is timezone independent</b>
Dropdown	Multiple choices input, it will show all the possible answers on a popup
Radio	Multiple choices input, it will list all the possible answers immediately. Only one answer can be chosen
Checkbox	Multiple choices input, it will list all the possible answers immediately. Multiple answers can be chosen
Text Box	A big box to enter text on multiple lines
Readme	An input that does not require any answer, useful to show hint/tips to users while completing the questionnaire or at the beginning of it as introductory text.
Location	Geographic data, answer will be the latitude and longitude provided by the device hardware. Accuracy is also captured (best value is usually 4/5 meters depending on device). Both latitude and longitude values are rounded to 6 decimal places, providing a precision up to 11.1 cm. <a href="#">More Info</a>
Photo	An image taken with the camera, or an image file picked by the one stored on the device
Audio	An audio recording using the device microphone
Video	A video recording using the device camera
Barcode	Uses a barcode scanner to get the answer ( <a href="#">what barcodes do you support?</a> )
Branch	A dynamic list of entries, useful for questions like "List your family members"
Group	Inputs within a group will be displayed on the same device screen

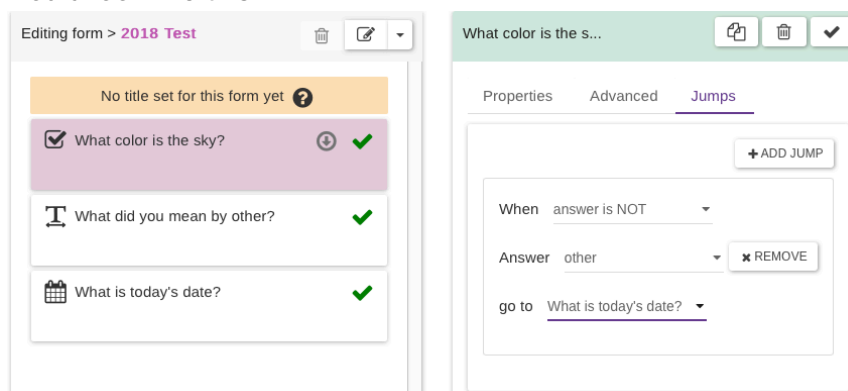
### Setting up question “jumps” (i.e., skips)

Occasionally you will want to collect different information based on a user’s response to a particular question. For example if you ask a multiple choice question that includes an “other” option, you are likely going to want to know why the user selected “other.” However, if the user did not select “other” you don’t want to ask “what did you mean by other?” This is when a jump (or skip) is helpful.

1. After adding a question that you would like to be the basis of a skip/jump, select the **Jumps** tab in the far right column. **NOTE:** *This can only be done once you have already added the questions you want to skip and the question you want to jump to.*



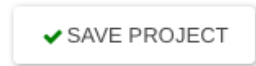
2. Select **+Add Jump**.
3. In the box that opens, under **When**, select what you want to trigger the jump. For example,
4. Under **Answer**, select what answer value would trigger the jump.
5. Under **go to**, select the question you would like to jump to.
6. For example, if you are looking to ask “What did you mean by other?” following a multiple choice question, you would only want the user to skip that question if they DID NOT answer “other.” (i.e., If they did select other you would want them to move on to the next question – What did you mean by other?) In this scenario, so you would select When - **answer is NOT** and Answer - **Other** and then go to proper next question. Your Jumps box would look like this:



In this example, the user would only see the “What did you mean by other?” prompt if they had answered “other” to the “What color is the sky?” question. If they did not answer “other,” they would jump to the “What is today’s date?” question.

### Save your project

1. When you are done adding questions to your form, select **Save Project** in the upper right.



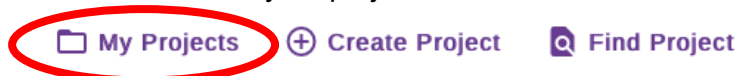
2. Once your project is saved, leave the formbuilder by clicking **Exit**.



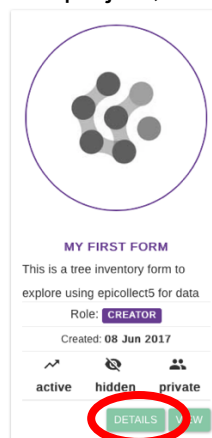
### Edit Project Settings

Once you have created a project and form, you can also edit your project details and settings.

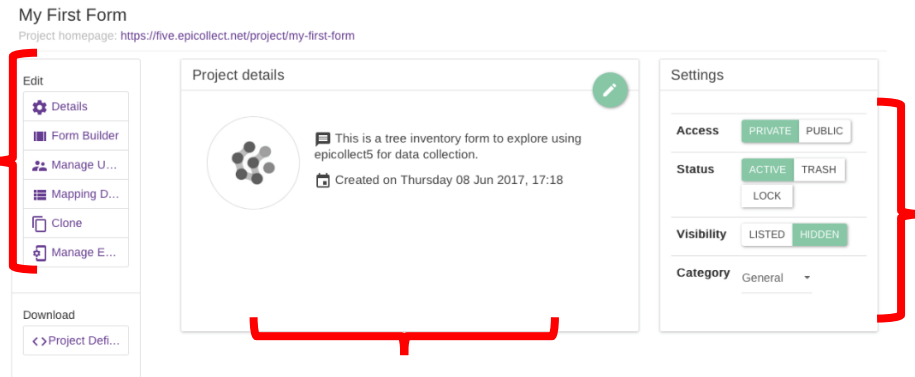
1. Assuming you are still logged in to your account on Epicollect, select **My Projects** from the top menu bar to view all of your projects.



2. To review the settings of a particular project, select **Details**.



- The details page that opens is where you manage everything about your project. Review the image below to get oriented with this page. The graphic explains what you can do with each of the edit menu items:



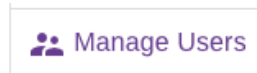
**Choose which part of your project you want to edit**

**Edit your project icon and description**

**Control who can find your project**

## Add Users

- To control who can access, edit, and/or add to your project, select **Manage Users** from the edit menu (left column).

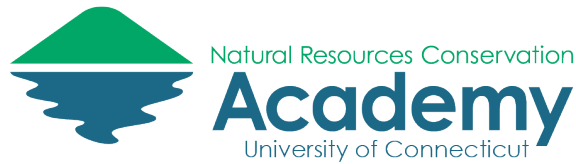


- Note that there are 4 types of users you can have access your account.
  - Creator** – The person who setup the project (i.e. you). This can't be changed. Creator has full access to the project, can authorize other users, and change settings and forms.
  - Managers** – has full access like a creator except they can't assign other managers.
  - Curators** – can view, edit and upload data, but cannot make changes project settings or forms.
  - Collectors** – can view and upload their own data only. Cannot make changes project settings or forms.

- To add another authorized user, select **Add Users** on the far right side of page.







7. Add an email address for a user (they will use this email address to log in to the system). Assign the user a role based on the options above using the **Role dropdown menu**. Select **Add User**.

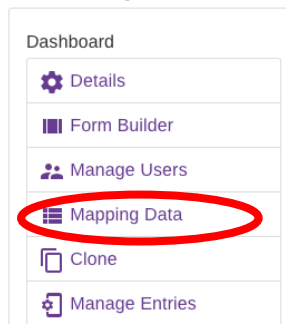
A screenshot of a web interface dialog box titled "Add User to this project" with a close button (X) in the top right corner. The dialog contains two input fields: "Email" with the value "cary.chadwick@uconn.edu" and "Role" with a dropdown menu currently showing "Collector". At the bottom of the dialog are two buttons: a grey "CLOSE" button and a purple "ADD USER" button.

8. Any person you add should now appear under the tab for their assigned role.
9. **Note:** The folks you add as users DO NOT receive an automatic email confirmation that they have been added to your project. If you want them to know you have added them you have to tell them. See "Sharing" section below.
10. **Another Note:** Users need to have a Google login to use Epicollect. If you don't want your users to have a Google login, you can make your project public. (See next section.)

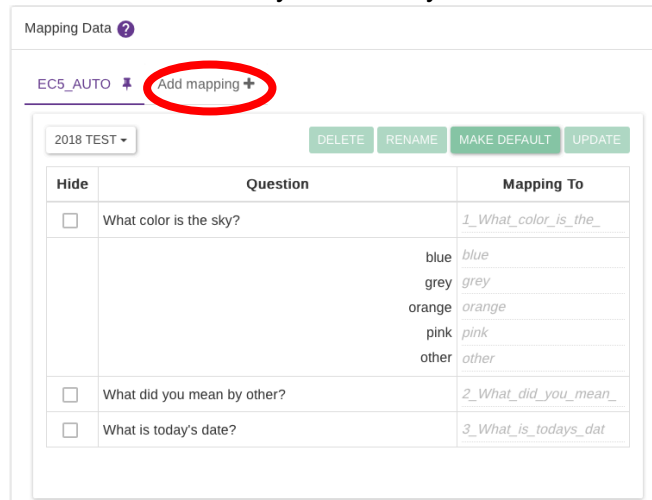
### Editing Your Data Field Names/Categories

By default, Epicollect5 uses the questions you create as field names in your data table. However, the field names are a limited number of characters, so that when you look at a column in the data table the column headings are shortened versions of your questions and often not clear what was being asked. For this reason, it is a good idea to customize what each question is called in your data table.

1. In your project Dashboard, select **Mapping Data**.



- In the Mapping Data window, notice you will see the questions you added to your form and the data field name that it will use by default in your data table and map.



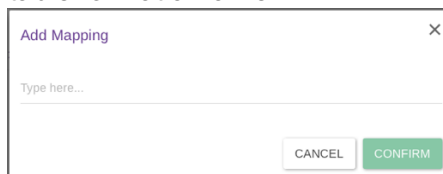
Mapping Data ?

EC5\_AUTO ▾ Add mapping +

2018 TEST ▾ [DELETE] [RENAME] [MAKE DEFAULT] [UPDATE]

Hide	Question	Mapping To
<input type="checkbox"/>	What color is the sky?	1_What_color_is_the_
		blue blue
		grey grey
		orange orange
		pink pink
		other other
<input type="checkbox"/>	What did you mean by other?	2_What_did_you_mean_
<input type="checkbox"/>	What is today's date?	3_What_is_todays_dat

- To customize the "Mapping To" field names, select **Add mapping+**.
- Give your customized data table format a name.

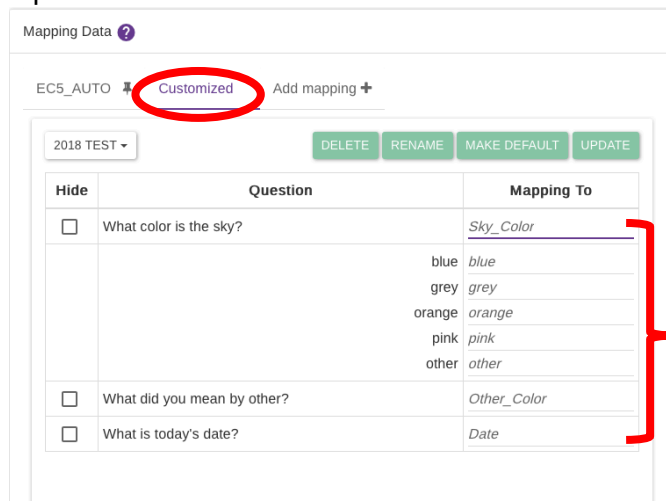


Add Mapping ×

Type here...

[CANCEL] [CONFIRM]

- With your new data table format name selected, you can begin customizing the field names for each question.



Mapping Data ?

EC5\_AUTO ▾ Customized Add mapping +

2018 TEST ▾ [DELETE] [RENAME] [MAKE DEFAULT] [UPDATE]

Hide	Question	Mapping To
<input type="checkbox"/>	What color is the sky?	Sky_Color
		blue blue
		grey grey
		orange orange
		pink pink
		other other
<input type="checkbox"/>	What did you mean by other?	Other_Color
<input type="checkbox"/>	What is today's date?	Date

**Click here to edit field names**

- Pro Tip:** Mapping programs generally do not like field names with spaces in them. It is best to create field names without spaces. For example: SkyColor or Sky\_Color. This will make it much easier to import your data into a variety of mapping programs later on.

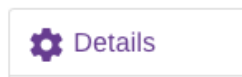


## Making your Project Public

Making your project public will allow anyone to view & collect data for your project without having to login with a google account. Rest assured however, they cannot edit your project settings or form(s).

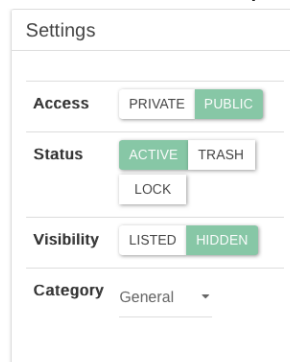
Once your project is public, you can still restrict who can access it by making it a “hidden” project. This means a user needs the project url or exact project name to find it on the web or in the app.

11. To make your project public, select **Details** from the edit menu on the project settings page.



12. In the **Settings** panel on the right side, select **Public** for the Access.

13. Also in the **Settings** panel, decide whether to select **Hidden or Listed** for visibility. Listed means your project will show up in the project gallery on the Epicollect website for anyone to see. Hidden means a user needs the project url to access it.

A screenshot of a "Settings" panel. It contains four sections: "Access" with "PRIVATE" and "PUBLIC" buttons (PUBLIC is selected); "Status" with "ACTIVE", "TRASH", and "LOCK" buttons (ACTIVE is selected); "Visibility" with "LISTED" and "HIDDEN" buttons (HIDDEN is selected); and "Category" with a dropdown menu showing "General".

You are now ready to start collecting data with your customized form! See the Epicollect5 App guide for information on how to access your form on your mobile device.