Photo: WFP/Rein Skullerud

Survey Designer

User Manual

WFP
World Food Programme

SAVING LIVES
CHANGING LIVES

RAM IM Ecosystem – December 2023

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Introduction

WFP has identified a corporate-wide critical gap in the process of converting assessment and monitoring data into operational knowledge in a timely manner. WFP has been investing in the development of databases and engines capable of accommodating and processing household survey data for evidence creation. These evidence-generating platforms, including the Survey Designer, are now available as part of an

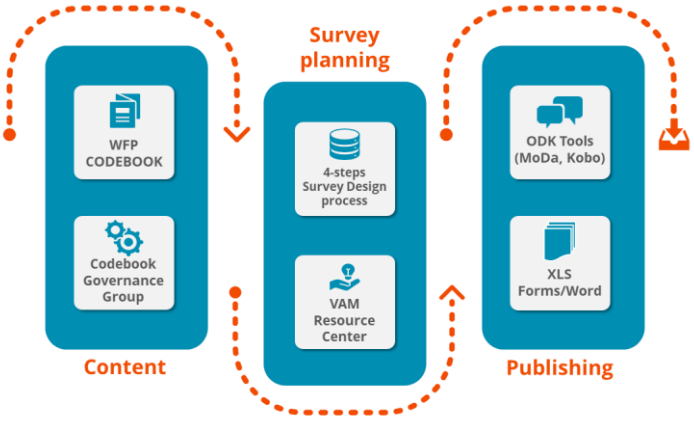
.

This manual is for any Survey Designer user, either WFP employee or an external partner employee. This manual aims at supporting users in building a survey through a guided, efficient, and conscious selection of content.

What is Survey Designer

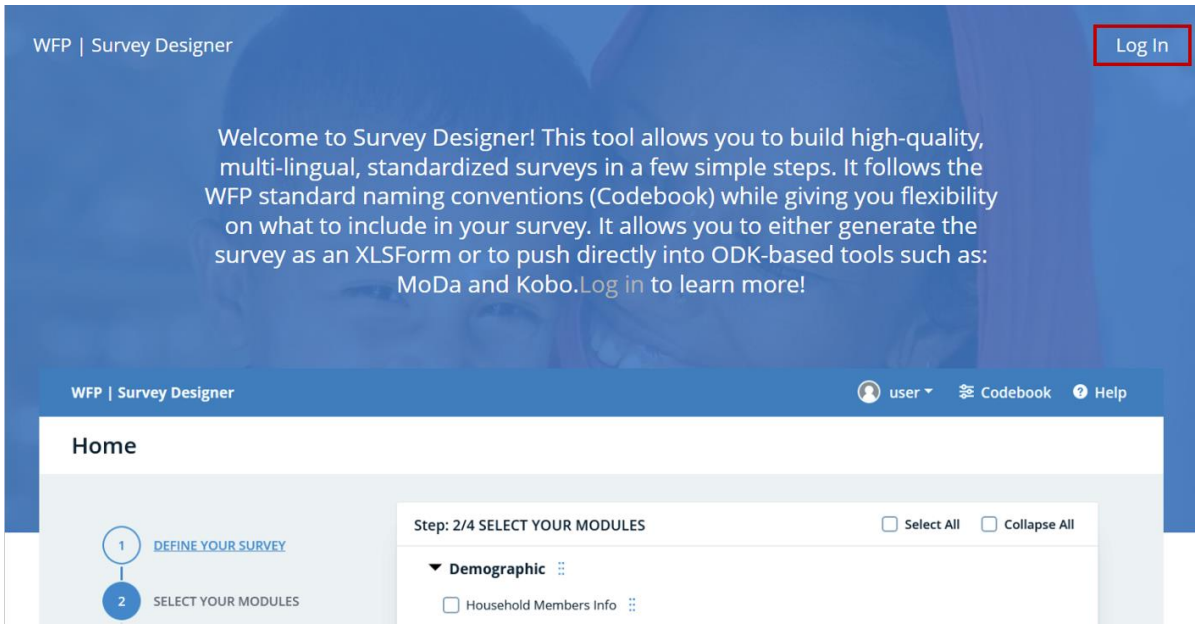
Survey Designer is a web-based tool that allows users in the field to build **tailored surveys** in **multiple languages** using **standardized corporate survey content**. The platform helps users **reduce time and effort** in the survey planning and design phases, improving the **quality of data** and enabling **data comparability** for decision-making. The adoption of the Survey Designer is a crucial step to enforce **automation** in the data flow process from survey planning to data collection, data analysis and visualization.

Surveys can be generated through a **4-step user-friendly process** and then **exported** into different formats (Word and XLS) or **directly submitted to ODK tools** (MoDa, Kobo). The **standardized corporate content** used to build surveys can be navigated through the **Codebook**, an XLSForm database containing all survey items (questions, choices, survey types and other fields). A link to the **VAM Resource Centre** gives leads to all the **methodological and operational materials** related to survey content (guidelines, analytical scripts, survey templates).

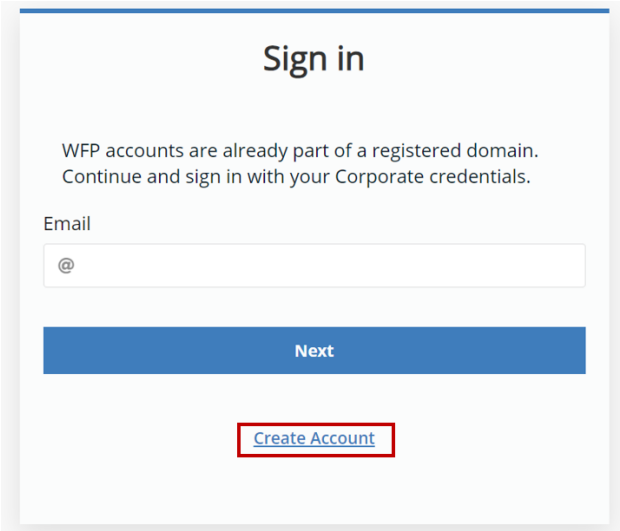


Log-in and homepage

When accessing the Survey Designer platform, user can log in from the top right corner.

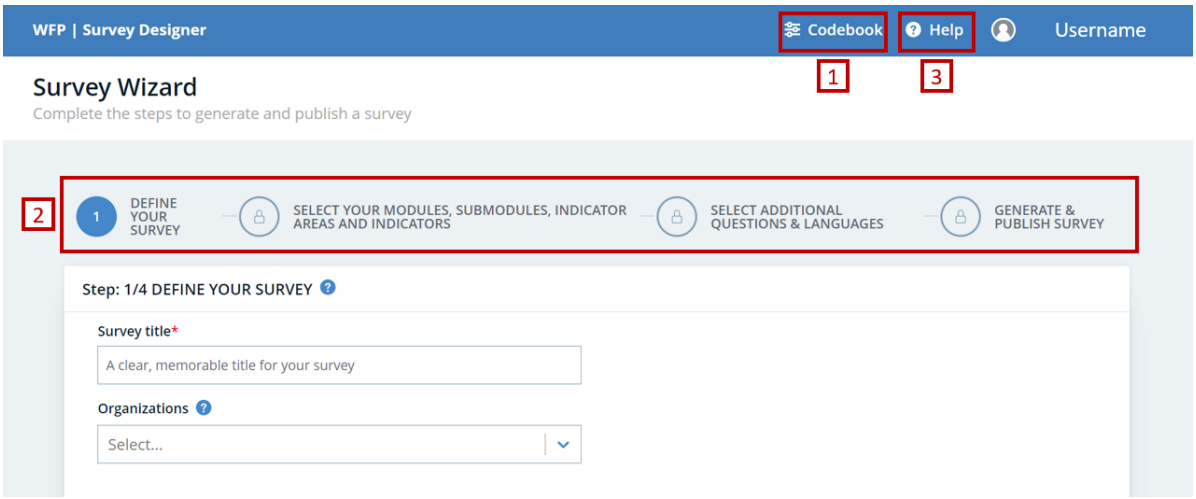


WFP users can directly enter the platform using their corporate credentials. First-time users not from WFP must **create an account** before being able to sign in.



Once signed-in, users can access the homepage which provides access to the:

1. **Codebook**
2. **4-step Survey Design Process**
3. **Help Page**



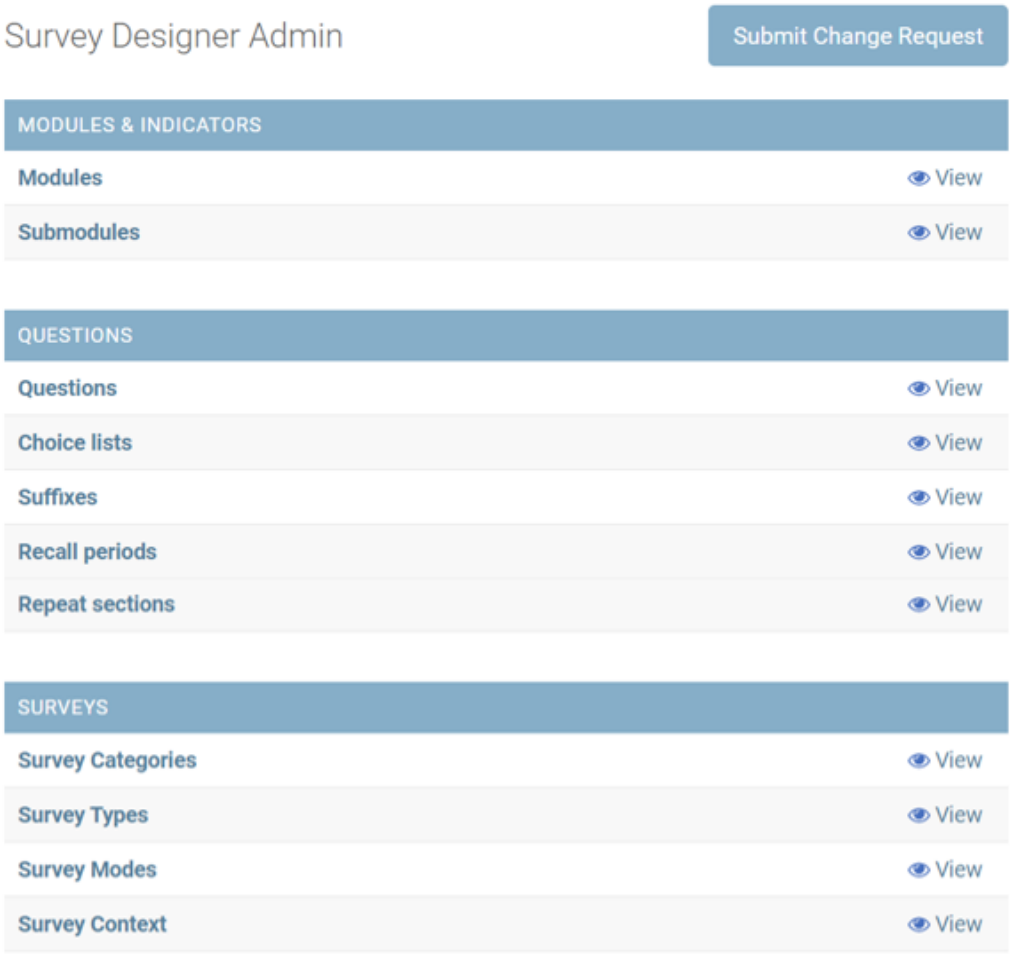
The homepage corresponds to the first step of the Survey Design process, which will be explained in detail in section 'The four-step design process'. Users that want to generate a new survey and submit it to an ODK-tool or export it in a Word or XLS format should start the process by selecting the different options in the dropdown lists. From the top bar, it is possible to access either the Codebook page (see section 'How to plan a Survey') page or the Help Section (see section 'Help Section').

How to design a Survey

The set-up of a questionnaire in Survey Designer should follow a specific procedure that makes the whole **data collection phase more effective**. It is strongly recommended for users to follow carefully the 3 steps below, before starting the design of a survey in Survey Designer, to ensure a smooth process and high-quality survey.

1. Navigate the Codebook

Before starting to design their surveys, users are highly recommended to **familiarize with the Codebook**, by clicking on the Codebook section in the top bar. The structure of the Codebook is that of a repository for the different survey elements that populate surveys. In the Codebook section, users can navigate survey content through different filters corresponding to different survey entities (modules, submodules, indicators, questions, choice lists… etc.).



The overall content is organized into the following survey elements:

Modules are groups of submodules organized by thematic areas (e.g.: Demographic, Nutrition, Food Security… etc.) and reflect how survey content is normally organized. These groups are identified, in XLSForms, by "*begin_group*" and "*end_group*" statements. In step 2 of the 4-steps survey design process, they appear as accordions for the selection of the submodules to include in the survey.

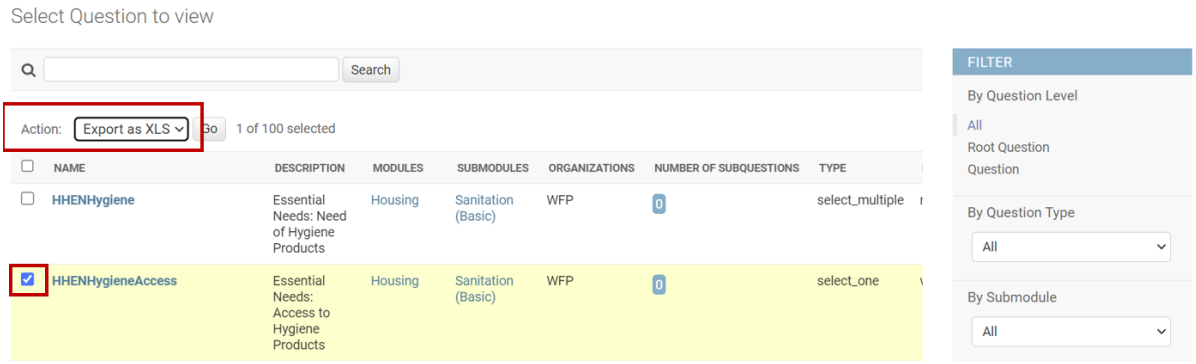
Submodules are set of questions; and one or more submodules define a Module. Submodules are grouped by thematic areas or by other survey standards (e.g., indicator, survey type). Submodules are the basic units to build a survey in the Survey Designer.

Indicators are groups of questions that allow to collect data needed to compute an indicator. Indicators can be considered as a parallel and independent way to add questions, different from submodules. Questions that allow collection of data to compute an indicator might be split in various submodules. If a question is part of both, and both are selected, the question is not duplicated. Indicators can contain survey

questions belonging to different submodules. Indicators are, in some cases, linked to the organization's Corporate Results Framework (CRF).

Indicator Areas section lists all the thematic areas that are used to organize indicators. They permit the grouping of indicators in Step 2 of the 4-steps survey design process.

Questions are the basic unit for survey design. They are mapped to one or more submodules and/or to one or more indicators. A system of filters based on other survey elements can be used to navigate the questions repository. From this section, it is possible to export selected questions from the platform in the Survey Designer compatible XLSForm format. This is done by using the checkbox on the left and selecting the "*Export as XLS*" command in the *Action Dropdown* (top left).



Choice Lists appear in multiple selection-type questions. The choice lists are standardized and can be associated with one or more questions.

Suffixes are final parts of variable names, introduced by an underscore. Suffixes indicate logic variations, also known as subquestions, of the Root Question, which is the neutral version of a survey questions. The Codebook allows up to a maximum of two suffixes for a single subquestion. Suffixes selection, meaning inclusion of optional subquestions, is possible in step 3 of the 4-steps survey design process.

Recall Periods, like suffixes, are marked by underscores and are positioned at the end of variable names. They identify some temporal variations of the Root Questions, thus generating subquestions referred to different times of reference. Recall Periods selection is possible in Step 3 of the 4-steps survey design process.

Repeat Sections contain special groups of survey elements that allow the repetition of one or more questions. A single repeat question section links the repeated questions to the count-repeat variable that shapes the repetition. This generates a "begin_repeat" and "end_repeat" entity in the XLSForm.

Survey Categories is the section containing all the standardized macro-classifications of surveys. Survey Categories generally correspond to thematic or operational areas related to the surveys.

Survey Types a more detailed level of classification of standardized surveys. Survey Types are the basic reference unit for the mapping of Submodules (and respective Modules) to different standardized forms.

Survey Modes lists the standardized modes of data collection (Face-to-Face, Remote or CATI, Mixed, etc.). Survey modes operate as an additional filter for Modules and Submodules. Submodules might differ depending on the survey mode selected thus the same Survey Type might produce different forms based on the mode adopted.

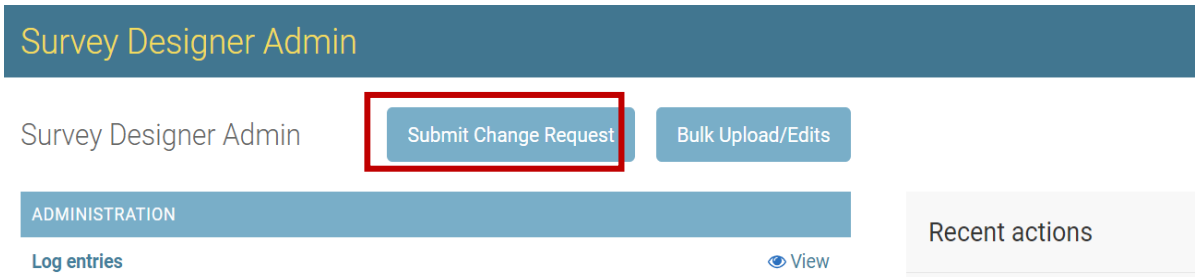
Survey Contexts contain the different additional groups of Submodules that can be added to standard Survey Types to tailor the surveys based on different contexts (ex.: rural context, refugee-camps, urban context, etc.). When selected in step-1 of the 4-steps process, it adds submodules to the form and must be referenced to specific survey types.

2. Modify the Codebook

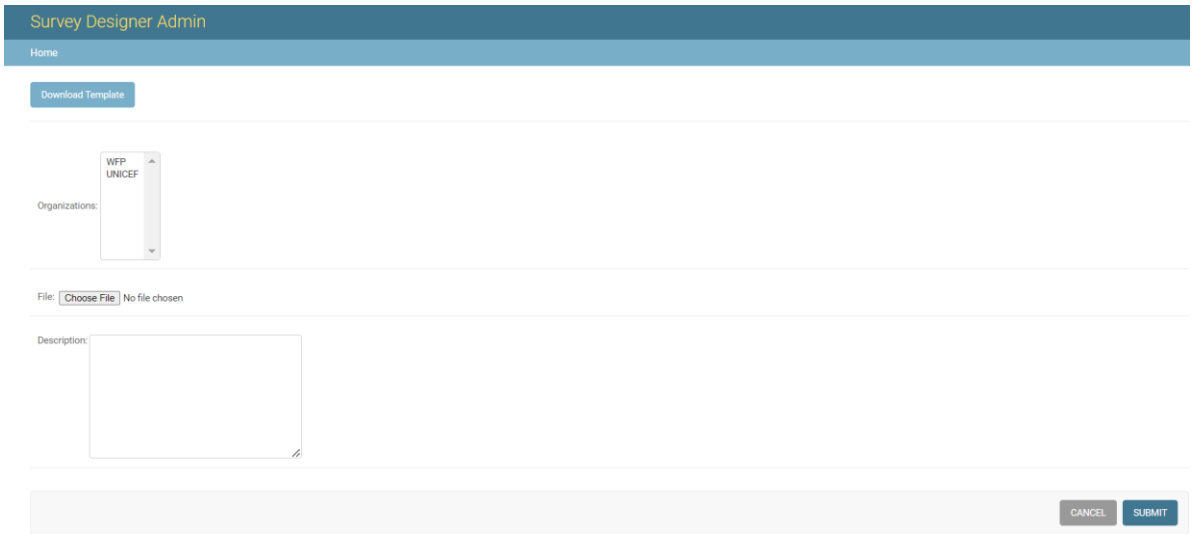
Users are not directly allowed to modify the standard survey content from the platform, but they are able to propose content additions or edits to Codebook administrators through two different procedures:

They can submit a file containing the edits or the additions to administrators through the **'Submit change request'** section on the top of the Codebook section. By clicking on the 'Submit Change Request' button, it is possible to download a template of a Survey Designer-compatible *upload form*, fill it in with the new content that is to be proposed, re-upload it in the platform ('Choose file' command) and submit it to the administrators. The *upload form* can contain both new content and/or modifications for existing content. New requests can be assigned to one or more organizations through the dedicated filter and details to guide the validation can be reported in the 'Description' section. The file will be stored and technically validated by the administrators, before undergoing the governance procedures. If approved, the new content will be integrated to the Codebook.

Users can also submit the proposed changes to the administrators through **existing communication channels** (See section 'Request for Support').



By using one of the two procedures, users will be able to have the proposed changed discussed by the administrators within one month from the submission date. Feedback on the discussion will be provided to the users who proposed the edits.



3. Data Library

Before generating a questionnaire in Survey Designer, ensure that you have created a new survey in the WFP Data Library platform to store all the survey materials, including documentation on objectives and meta-data on the activities that will be carried as part of the data collection. An equivalent approach with dedicated storage tools is also recommended for practitioners of other organizations.

Once these two steps are completed, the survey planning phase is finalized, and user can start designing their surveys.

The Four-Step Design Process

Step 1: Metadata and Type of Survey

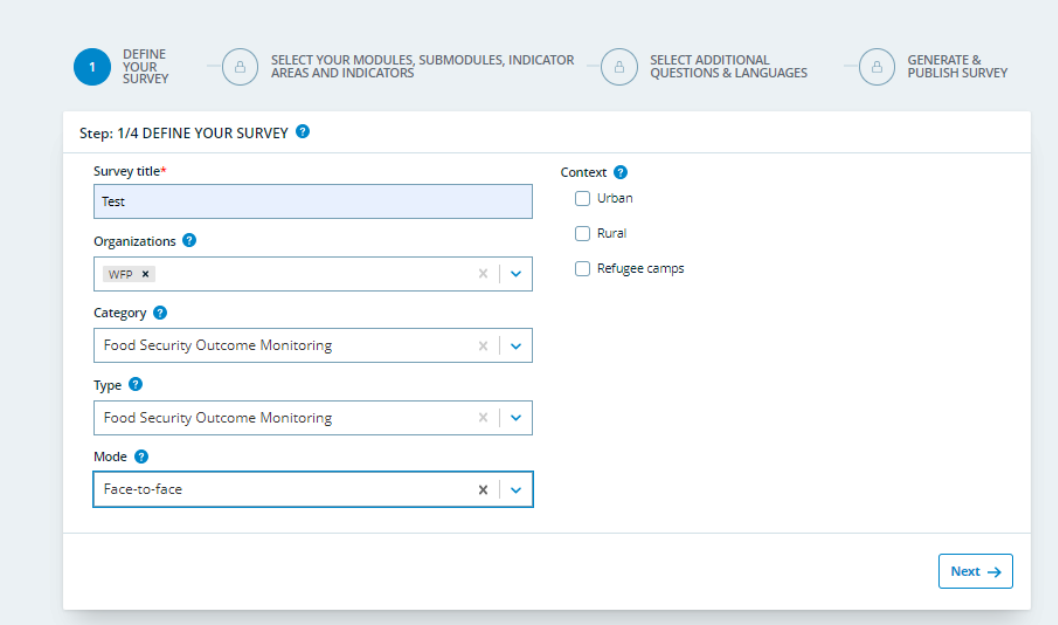
The first step helps users define the general features of their surveys and the related metadata.

The survey title bar requests users to insert a **survey title**. The survey title will **identify the survey** in the saved surveys storage section and in the ODK Tool projects but not in the exported Word or XLSForm files in Step 4/4.

In Step 1, users **should select** one or more **organizations that will be involved in the data collection**. The selected organization(s) filter the rest of the following dropdowns:

- **Survey Categories**
- **Survey Type**
- **Survey Mode**
- **Survey Context**

This selection will filter the survey content that users will be able to add in the following steps (Modules, Submodules, Indicators, Suffixes, Recall Periods).

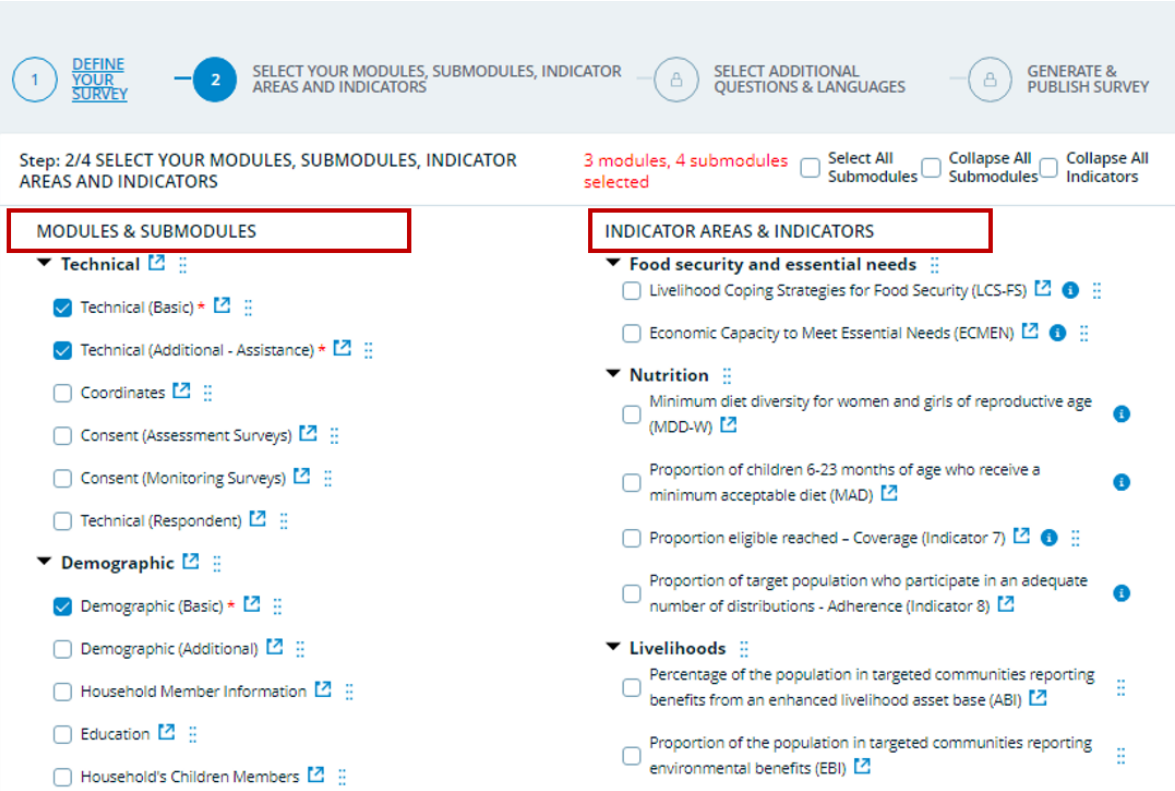


Once the selection of all the filters is completed, clicking on the 'Next' button brings users to the Step 2/4.

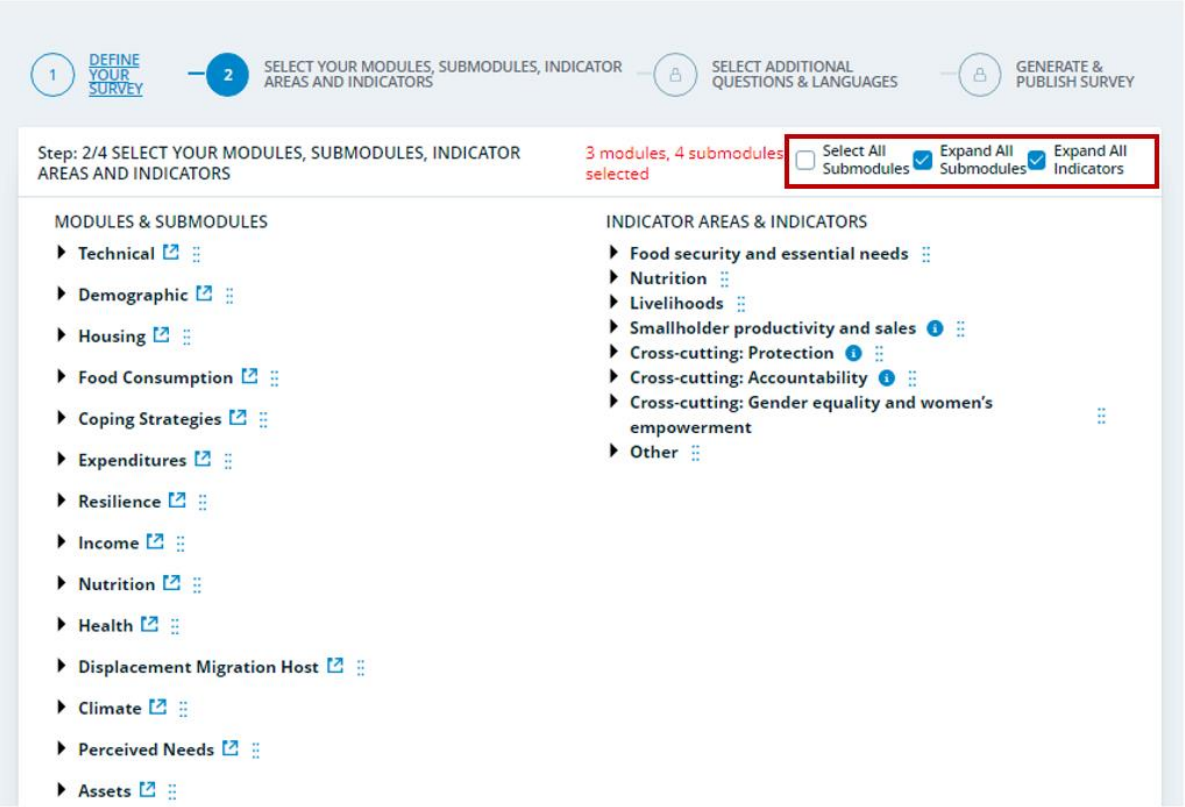
Step 2: Modules, Submodules and Indicators Selection

Step 2/4 is a crucial step for the definition of survey content and its organization.

The left column (‘**MODULES & SUBMODULES**’) allows the selection of survey submodules grouped under respective modules. These are filtered based on the categories, types, modes, and contexts selected in Step 1/4. Similarly, the right column (‘**INDICATOR AREAS & INDICATORS**’) lists all the indicators filtered based on the selections made in step ¼ and organized into thematic indicator areas.

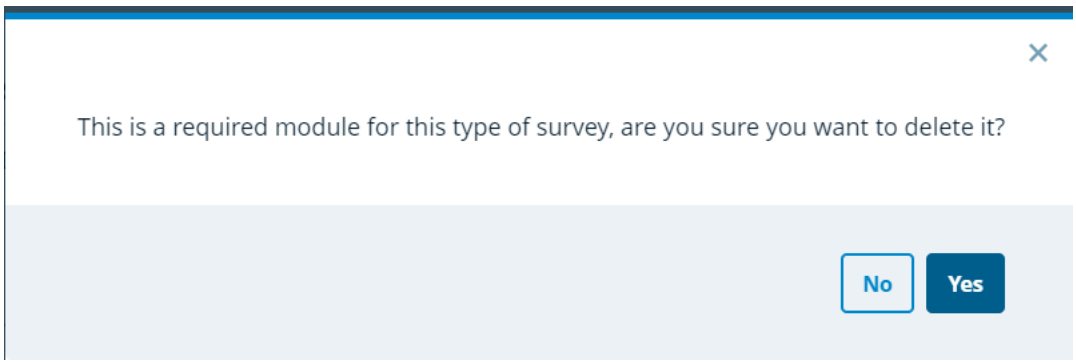


Three **tick boxes** in the top-right list options to help users **manage the list of submodules and indicators more efficiently**. (‘*Select all Submodules*’, ‘*Collapse all Submodules*’, ‘*Collapse all Indicators*’). Collapsing Submodules or Indicators lists provide users with a comprehensive overlook of the content.



Based on Step 1 survey type, some of the **submodules appear as already selected** when starting this step. These preselected submodules, and their associated survey questions, reflect the **recommendations of the thematic area experts** related to the **minimum data collection requirements**. They are intended as required items for the selected survey type.

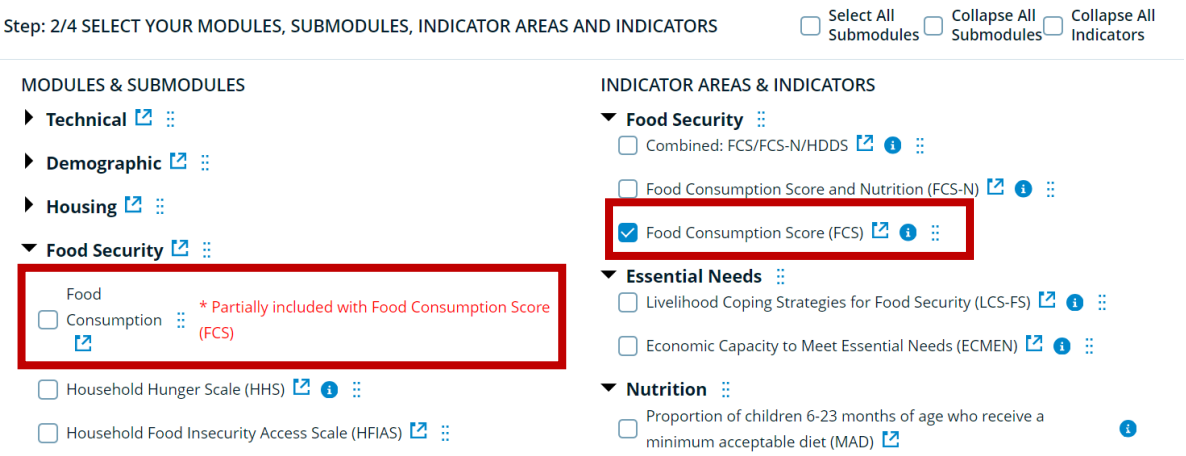
Required submodules can always be removed from a survey, if necessary, by unselecting the submodule and pressing 'Yes' on the automatic confirmation message.



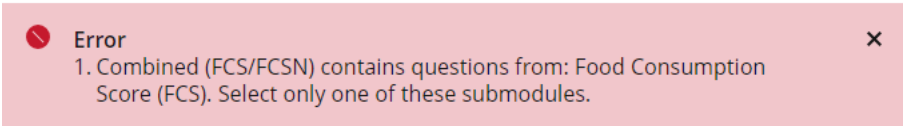
Default selection of **Indicators** is **not included** in the current version of Survey Designer, so users must **actively select the indicators to be included in the survey** from the right column. Users must ensure they are familiar with their office's indicator collection and reporting requirements when planning and designing their surveys.

The **arrow boxes** on the right of each Module, Submodule and Indicator **redirect** the user to the **Codebook** section with the survey content included in the submodule/indicator. (See section *Navigate the Codebook* for more info). The **info tag 'i'** on the right of Submodules and Indicators **redirect users to the VAM Resource Centre** that stores the methodological materials related to the content.

The interaction between Indicators and Submodules is the most crucial aspect of this section. When clicking on an Indicator, the platform will flag with a **message in red** the modules containing the questions included in the indicator. Selecting an indicator does not necessarily include the full submodule, but only the questions that are mapped to the indicator. If users only require questions related to the indicator, no further action is needed. However, users should select the submodule (left column) itself if they want to include all the submodule questions, and not only those in the indicator.



When including two or more submodules containing **duplicate questions**, an **error message** flagging the issue appears. Users must unselect the submodules with duplicated questions before moving forward.

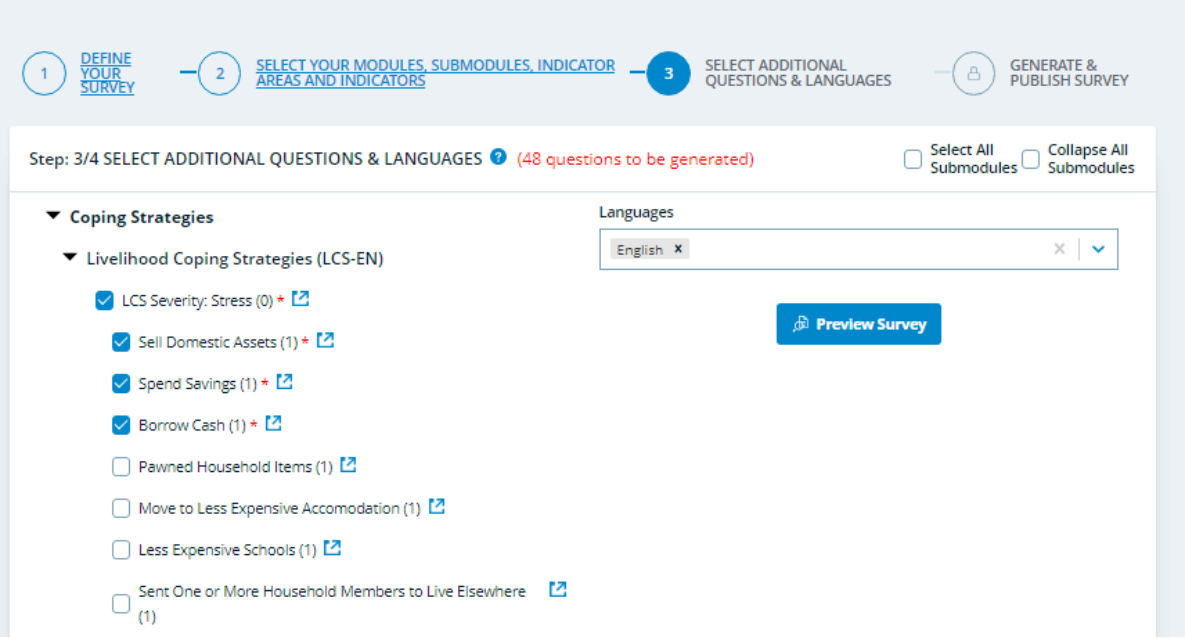


Step 2/4 displays **Modules, Submodules and Indicators** in the default **order** defined in the Codebook. However, users can manually edit, through drag and drop, the order of the different entities in case the order needs to be customised.

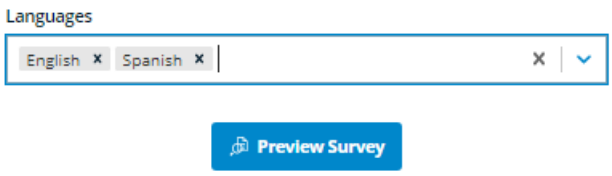
Users without any errors will proceed to the next step when clicking on the **'Next'** button.

Step 3: Suffixes, Recall Periods, Languages and Preview

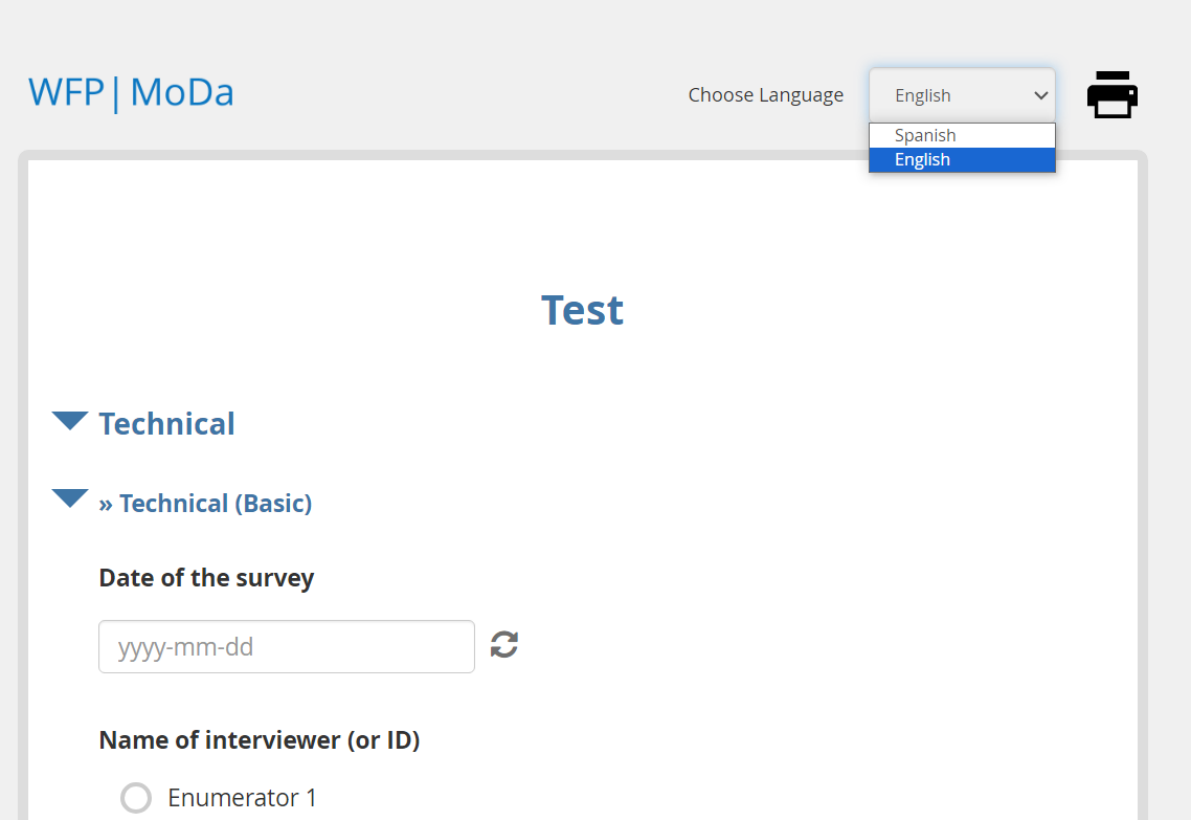
Step 3/4 allows a further level of customization of the surveys. In the left column users may select **suffixes**, **nested suffixes** and **recall periods**. The arrow boxes on the right of each suffix or recall period in the list, redirect users to the Codebook content associated with the selected suffixes. Also in this case, users can use the arrow boxes to verify the included questions.



On the right side of the page, it is possible to select one or more **languages** for the survey. The languages that appear in the menu are the languages in which **at least one of the selected questions** has available **translations**. Therefore, it is useful for users and for administrators to **double check in the preview** whether the **translations are all available** or if they need to be integrated manually (refer to Step 4/4 for further instructions).



By clicking on **'Preview Survey'**, a preview will be automatically generated. The preview will show the survey in the **format that will be displayed during data collection**. It is possible to visualize the survey in the selected languages using the top right menu.

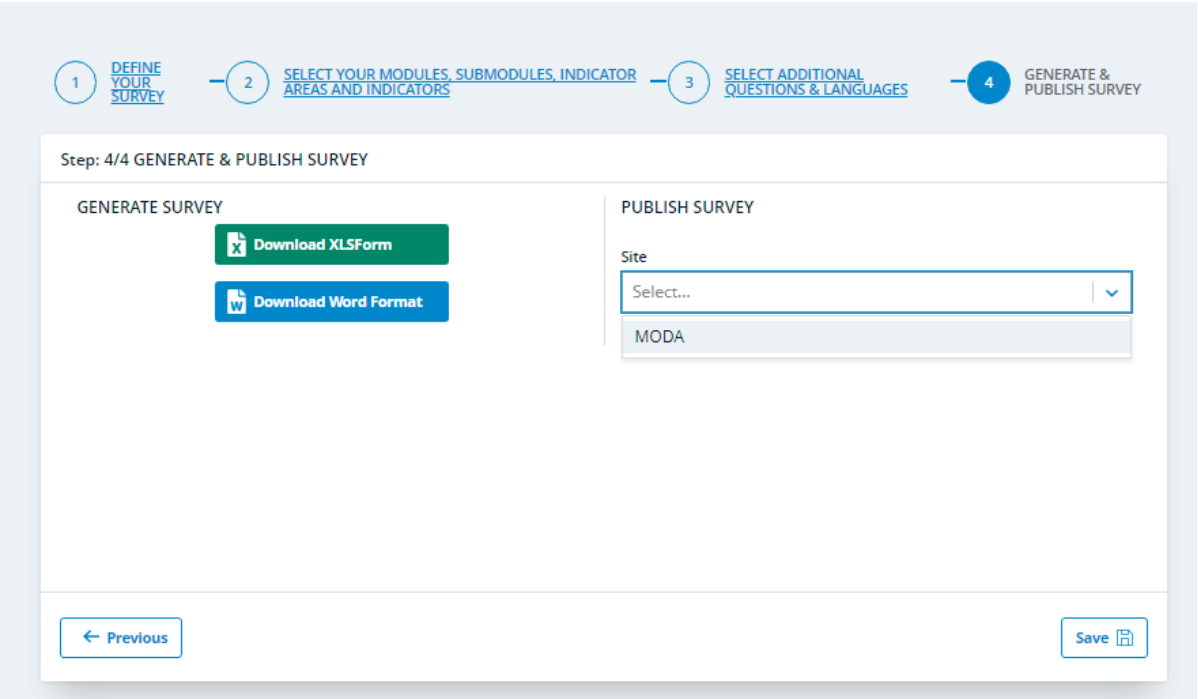


A printable version of the preview can be obtained by clicking on the **print button**. The preview allows the **final check of the survey's coherence**. The survey preview automatically generates a **link** that is useful for **survey dissemination with a non-technical audience** or to **double check** with thematic area colleagues the **validity of the uploaded content**.

Clicking on the 'Next' button, takes users to Step 4/4.

Step 4: Survey Export: XLS Form, Word, Submission to ODK Tools

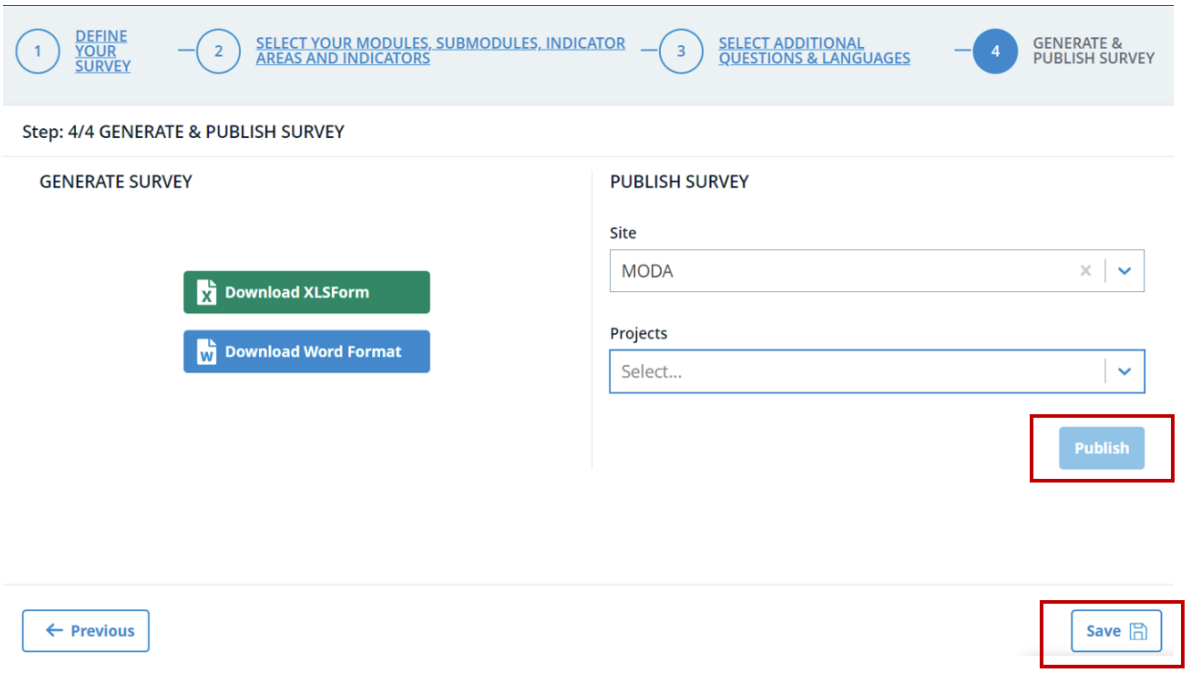
Step 4/4 is the final step of the survey design process.



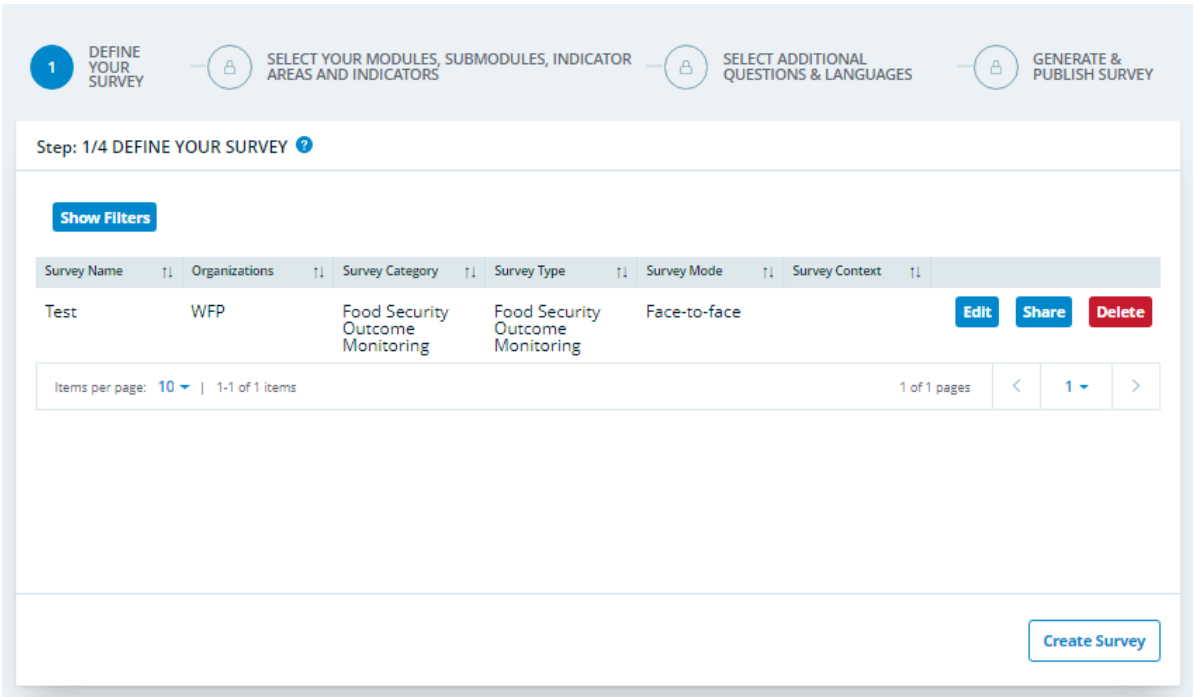
The left part of the page allows the **export** in standard **XLSForm** files or in **Word format**. While the Word format, together with the Enketo preview link, are the most efficient tools for dissemination to an unqualified public, the XLSForm file can be used to share the survey with a technical public or for a final check of the content. If the **standard content needs to be customized**, the **XLSForm can be edited manually** before the reupload on one of the ODKTools for data collection. Administrators can use the XLSForm as a final check of the quality and the functioning of the survey content.

The right part of the page allows the **direct submission** of the generated survey **to the ODK Tools** connected. To connect the Survey Designer with an ODK tool, check the '*Set-up the connection to data collection tools*' section below.

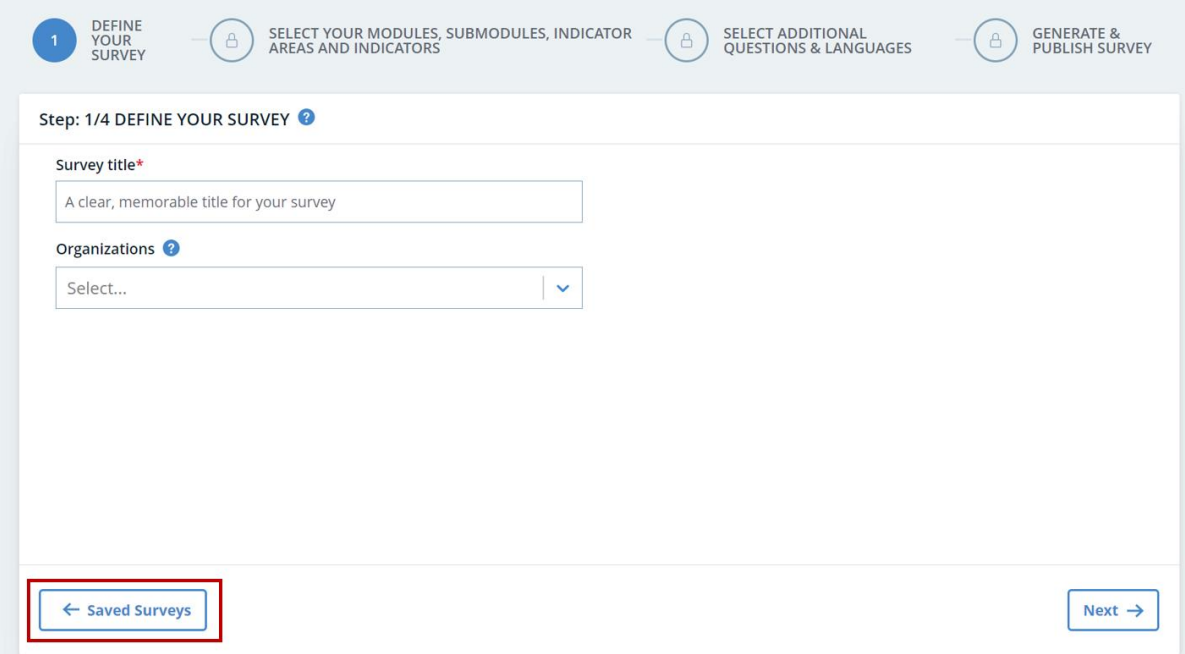
The '**Site'** dropdown allows the **selection of the ODK tool**. This selection automatically filters the Projects menu below, that allow users to select the specific folder of the ODK Tool storage database they want to send the survey to. Once the selection is finished, clicking the Publish button will push the survey to the ODK Tool. The last function available in step 4/4 allows users to **save the generated survey**.



By clicking on the 'Save' button on the bottom right of the page, the platform automatically stores all the options selected to generate the survey. Users are redirected to the **database of stored surveys** where surveys can be edited, shared, deleted, or restored to regenerate the survey pattern in case users want to duplicate the survey (see section '*Saved Survey*').



After at least one survey has been created by a user, the saved surveys can be directly accessed from the Step 1 of the Survey Design Process.



Saving and Sharing Surveys

Sharing saved surveys

When sharing a survey, a **unique link** for the saved survey is generated. This grants any other **Survey Designer user** with the link the **possibility to copy** that survey and **save** it among its own surveys. This will create a **clone of the survey**, initially, which the recipient user can freely modify, and which will have a separate sharing link. It is thus **not possible for two users to work on the exact same survey simultaneously**: once the survey is copied, the two are decoupled. This prevents other users from modifying your own content, while enabling collaboration by sharing original questionnaires.

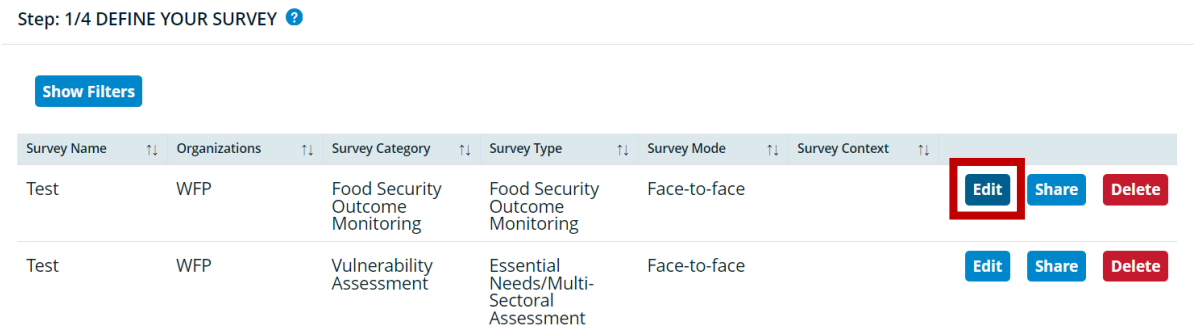
To **simplify collaboration**, we encourage users to follow the below example:

1. Colleague A to name their survey with the date of creation and version (e.g., 231120_ Country X_FSOM_v1)

2. Colleague A to send their survey link to colleague B responsible for reviewing the content
3. Colleague B to copy the survey received from the link
4. Colleague B to edit the survey and rename as the new version (e.g., 231125_Country X_FSOM_v2)
5. Colleague B to send the survey link to the next colleague for review

Editing saved surveys

Users can edit their own survey, maintaining the same link originally shared. This allows users to **progressively update surveys** as needed including new submodules and indicators, and particularly selecting new suffixes and recall periods when the relevancy of those should change. This function allows **version control** and **real-time updating** of content by the authors, without having to recreate and reshare surveys.

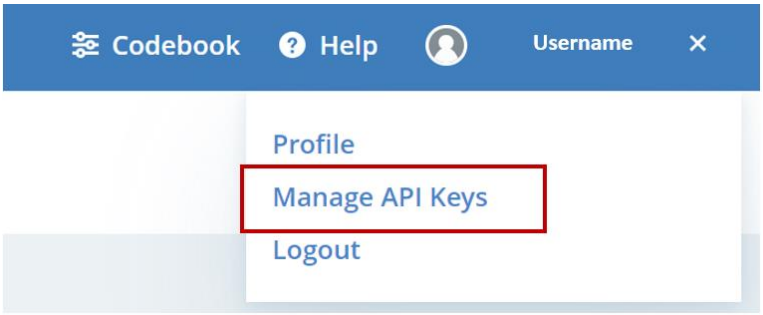


Deleting saved surveys

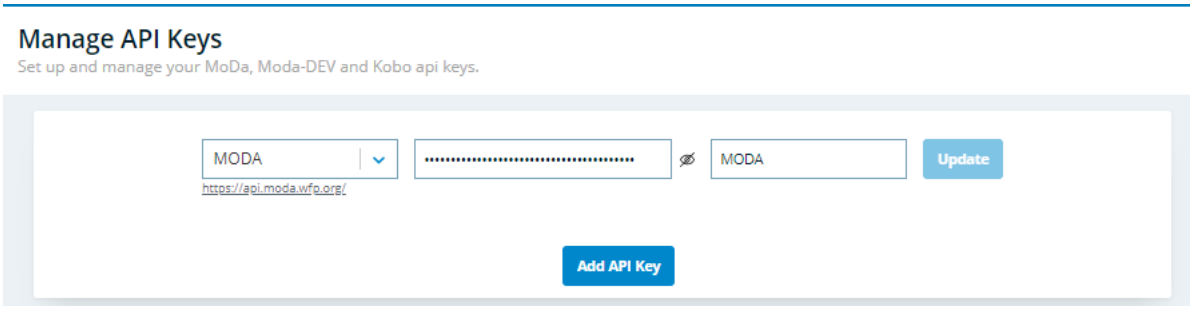
If the **survey is deleted**, **no user will be able to retrieve** the survey even if the link was previously shared. The page will not be found. This is equivalent to invalidating a shared link and can be useful in case a shared link is no longer valid.

Set-up the connection to data collection tools

Survey Designer allows users to **directly publish** the survey generated to one or more of the **data collection tools** (MoDa, Kobo, etc.) that are based on the ODK technology (see Step 4). To enable this function, users must set the connection to an ODK Tool by adding their **API (Application Programming Interface) key** or token in the *Manage API Keys* section. API keys and token can be accessed in the platform navigation bar under the user's profile.

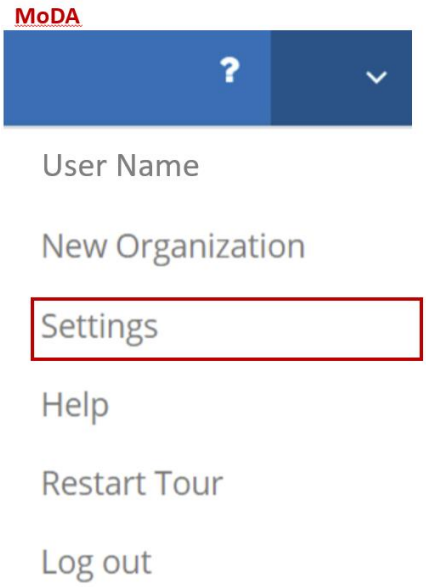


Accessing the ***'Manage API Keys'*** section opens a new page with the API Keys credentials. Users should select from the dropdown the ODK Tool (MoDa, Kobo, etc.) they want to establish a connection with. the API Key must be inserted in the second bar in the centre. In the third box, users can specify a unique name identifying the API Key. Users can find their **API Keys** in their **personal page in the ODK platforms**. Note that those keys will not be visible to other users or platform administrators.

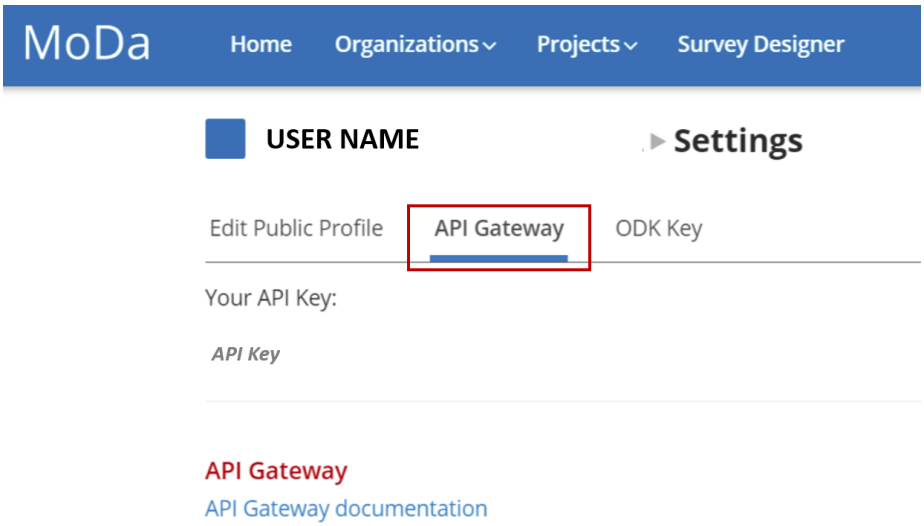


To find the API Key to MoDa, users must:

1. Enter their **personal page in MoDa** and click on the initial letter of their name at the top-right of the navigation bar.
2. In the dropdown menu, access the **'Settings'** section



3. Open the **API Gateway** section. The API Key is reported in the page.



4. **Copy the API Key and paste it** in the dedicated bar in the Survey Designer '*Manage API Keys*' page.
5. Click on the **'Update'** button

After following these steps, the platform establishes the connection to MoDa and surveys created with the Survey Designer will be automatically published on the ODK Tool.

Help Section

The **Help Section** remains a key tool to review frequently asked questions and suggestions from Administrators, as well as finding contacts. It can be accessed from the homepage by clicking on the Help tag on the top bar. This page provides a general overview on the functioning of the platform and on the basic entities of the Codebook. It also provides useful contacts for support requests (email addresses, SharePoint, Teams, etc). New users are encouraged to read the help section when starting to use the platform.

Requests for support

To ask for support on the use of the platform, please refer to different dedicated channels:

- **Teams:** Survey Designer Teams Channel
- **Email:** RAM.IM.ECOSYSTEM <ram.im.ecosystem@wfp.org>

We highly encourage you to reach out to us in the following cases:

- Report **bugs/issues**.

- Submission of survey content **translations** in local languages.
- Request platform **development**, new features, or enhancements.
- Ask for **help** if any question is not addressed by the Help Section.
- **Discuss** survey content edits.
- Ask for support on **MoDa/Kobo** submissions.
- Provide **any feedback** on the use of the Survey Designer.

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