

Mobile Data Collection Toolkit - SurveyCTO

Workflows of a SurveyCTO form

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What is the benefit of workflows on SurveyCTO?

Setting up workflows for reviewing and correcting some (or all) of the forms and datasets on the server allows, for example, to:



- **Review submissions** (form responses) before they are published or exported
- **Make corrections** to submissions
- **Approve** or **reject** submissions



Only approved submissions can be used afterwards (exporting data to Excel, or to other analysis tools via the API, etc.).

Activate workflows

Workflows are activated in the "Monitor" tab:

The screenshot displays the SurveyCTO web interface. At the top, the 'Monitor' tab is selected and circled in orange. Below the navigation bar, the 'Form submissions and dataset data' section is also circled in orange. The main content area shows the 'Groupe Ghana' group and the 'Ghana Baseline' form. In the top right of the form's toolbar, the 'Review workflow' button is circled in orange. Below this, the 'Form ID: ghana-baseline, Complete submissions: 0' is shown. The 'Review workflow settings' section contains the text: 'The review and correction workflow allows you to review submissions before they are released for publishing or export, making corrections, rejecting, or approving as appropriate. If this workflow is enabled, some or all submissions may need to be approved before they are published or exported. [Learn more...](#)'. At the bottom of this section, the question 'Enable review and correction workflow for this form?' is followed by a 'YES' button, which is circled in orange.

Manage workflows (1/5)

For each form, workflows allow you to :

Enable review and correction workflow for this form?

YES

1

Submissions to flag and hold for review

Choose which submissions will be held for review. These submissions will require approval before being exported or published to downstream systems.

None Some All

All incoming submissions will be flagged for review

1

Define which submissions (which lines of form responses) should be reviewed (possibly revised) and then validated. If you choose to review only certain submissions, you will need to define under what conditions the data should be reviewed and validated:



To learn more about reviewing, editing and validating submissions, watch the [SurveyCTO video demonstration](#).

Manage workflows (2/5)

Submissions to flag and hold for review

Choose which submissions will be held for review. These submissions will require approval before being exported or published to downstream systems.

None **Some** All

Some incoming submissions will be flagged for review

1

Flag incoming submissions based on results of quality checks

Requires at least one quality check to be set up. [Click here to learn how to set up quality checks...](#)

- Flag any submission with a submission-specific QC warning (e.g., "value is too high")
- Flag any submission that is part of a *group* that triggered a QC warning during the last full evaluation (e.g., "group mean is different")
- Flag any submission that would further contribute to a field-specific QC warning raised during the last full evaluation (e.g., "value is too frequent")

All Only critical

2

Flag a random percentage of submissions

Select percent at random

1

It is possible to request to review and validate only entries based on the results of automated quality checks* .

2

It is possible to request to review and validate only a certain percentage of the submissions (in addition to those that would have been retained based on the results of quality controls).

Manage workflows (3/5)

For each form, workflows allow you to :

2

Corrections require comments

You can require users to enter a comment to explain every correction they make.



Comments not required

3

Un-approve and un-reject

The un-approve and un-reject options allow reconsideration of submissions, so that further comments and corrections can be made. May have [consequences for downstream data systems](#).



Un-approve and un-reject disabled

2

Ask users to enter a comment to explain what was done for each correction they made.

3

Advanced setting to be used with caution - Change the status of a submission (approved or rejected) at any time.

Manage workflows (4/5)

For each form, workflows allow you to :

4

Approve-all

The approve-all option allows users to bulk-approve all submissions awaiting review, rather than reviewing and approving them individually.

OFF

Approve-all button
hidden

Cancel

Save

4

Allow users to approve all submissions that need to be reviewed and validated in one go, rather than having to do so individually for each submission.



If a new submission is to be reviewed, you will receive a notification on the server and can then review and possibly validate that submission.

→ To learn more, check out the [SurveyCTO demo video](#).

Manage workflows (5/5)



When exporting data related to a form, it is possible to export both **approved data**, and/or data **held for review**, and/or **rejected data** (by default, rejected data and data held for review are unselected).

- **All corrections that have been made to submissions are recorded in the exported data** (*review_comments* and *review_corrections* columns added at the end of the database).
- To learn more, check out the SurveyCTO [demonstration video](#).

Workflows are relatively advanced parameters and must be adapted to the constraints (time, human resources, budget, etc.) that you have in the field. It is therefore not always relevant to use them.



For these reasons this tutorial is quite short. More information can be found in the [SurveyCTO documentation](#).

Other SurveyCTO tutorials available

In this toolbox, you will also find the following tutorials:

- **Groups, subgroups** and workspaces
- Centralized management of **roles, users** and **teams**
→ **Scenario** on the use of teams, groups and roles
- **Encryption of** data collected on SurveyCTO
- **Security settings** for SurveyCTO Collect
- **Submission types** on SurveyCTO
- **Case Management** on SurveyCTO
→ **Scenario** on case management and user-based access control
- **Importing** data into SurveyCTO
- **Automated quality checks** on SurveyCTO
- Data **filtering** before downloading on the SurveyCTO server
- **Bulk data deletion** on the SurveyCTO server

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