

# Mobile Data Collection Toolkit - SurveyCTO

## Scenario on the use of teams, groups and roles

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# Why might this scenario be useful to you?



This scenario will give you an example of :

- The use of teams
- **Role** management (**custom roles** and **pre-configured global roles**)
- **User** management
- **Groups** organization



This scenario presents an example of how to organize surveys on SurveyCTO, but it does not detail the steps to do so; it is not a tutorial\* .

## Scenario:

The international solidarity organization *Terre des ONGs* has deployed SurveyCTO in the field. Several countries, including *Ghana* and *Kenya*, use this tool for mobile data collection. Currently, each country has its own server. However, **the organization's headquarters (HQ) would like to set up a single server for all operations taking place in Africa** in order to centralize information, and also to allow each operation to set up some common data collection.

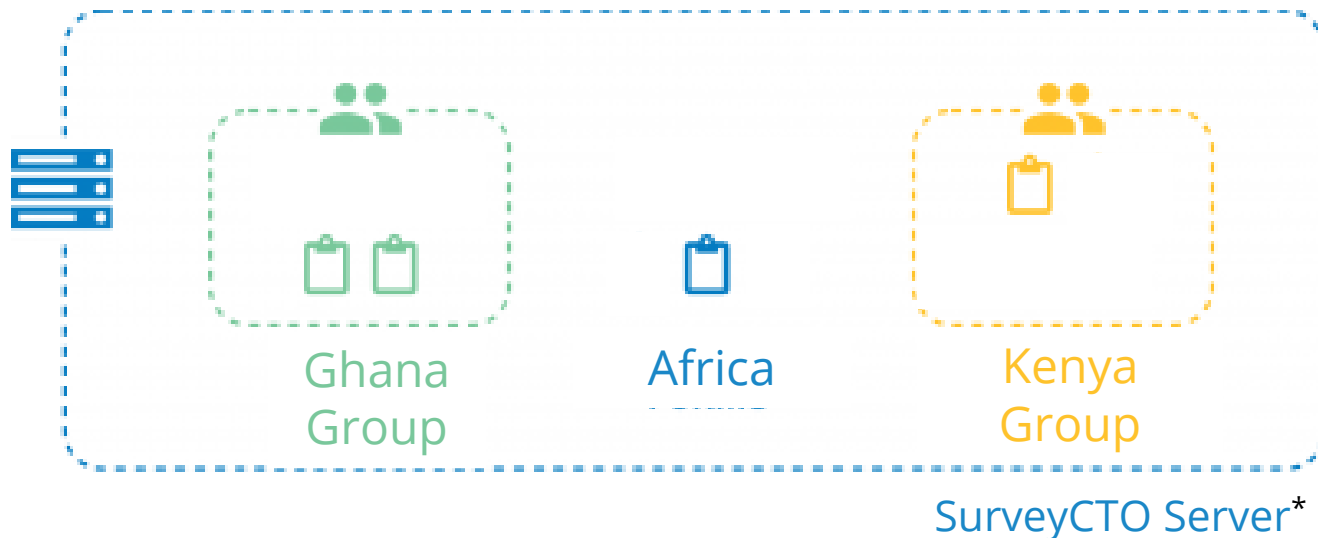
Thus:

- *Ghana* would like to deploy 2 questionnaires (*Ghana Baseline & Ghana Endline*) visible only to *Ghana* teams.
- *Kenya* would like to deploy 1 questionnaire (*Kenya Needs Assessment*) visible only to *Kenya* teams.
- *Terre des ONGs's* headquarters would like to deploy 1 questionnaire (*Africa Program Evaluation*) visible to the *Kenya* and *Ghana* teams.

# Proposed organization on SurveyCTO:

Creation of 2 **teams**:

- **Ghana** - with access to *Ghana group* forms + *Africa group* surveys (shared group)
- **Kenya** - with access to *Kenya group* forms + *Africa group* surveys (shared group)



# Proposed organization on SurveyCTO:

Creation of **custom roles**\* associated with each country - Example for the *Ghana team* (similar roles for *Kenya*):



- **Ghana - Data collection only** (enumerator (x2) )



- **Ghana - Data manager**



- **Ghana - Form and data manager**



- **Ghana - Form, data and user manager**



Each user in the *Ghana* team has access to all surveys in the *Ghana* group + *Africa* group (shared group).

# Proposed organization on SurveyCTO:

Assignment of a **global role**\* associated with the headquarters (*Africa*):

 • **Global Role - Administrator**



Each user associated with a global role has access to all surveys on that particular SurveyCTO server: *Ghana + Kenya + Africa* (shared group).

# Organization of the groups

Ghana group		Rename	Delete						
↓									
	Ghana Baseline	Test	Edit	Upload	Tools	Encryption	Download	Duplicate	Delete
Form ID: ghana-baseline, Deployed version: 1									
	Ghana Endline	Test	Edit	Upload	Tools	Encryption	Download	Duplicate	Delete
Form ID: ghana-endline, Deployed version: 1									
↑									
Kenya group		Rename	Delete						
↓									
	Kenya Needs Assessment	Test	Edit	Upload	Tools	Encryption	Download	Duplicate	Delete
Form ID: kenya-needs-assessment Deployed version: 1									
↑									
Africa		Rename	Delete						
↓									
	Africa Program Evaluation	Test	Edit	Upload	Tools	Encryption	Download	Duplicate	Delete



# Group Organization:

Name of the group	Contains the forms :
Ghana Group	<ul style="list-style-type: none"><li>• Ghana Baseline</li><li>• Ghana Endline</li></ul>
Kenya Group	Kenya Needs Assessment
Africa	Africa Program Evaluation

# Teams management



**Terre des hommes**  
Helping children worldwide.



# Organization of the teams:

The screenshot shows the SurveyCTO web interface. At the top left is the SurveyCTO logo. To the right are navigation icons: a home icon, a warning icon with a red '1', a menu icon, a help icon, and a user profile icon for 'renforcement-osc@cartong.org'. Below the navigation bar are four tabs: '1. Design', '2. Collect', '3. Monitor', and '4. Export', followed by a 'Configure' dropdown menu. On the far right of this bar is a 'Your teams' dropdown menu. The main content area is titled 'Your teams' and contains a toolbar with '+ Add team', 'Refresh', and 'Help' icons. Below the toolbar are two team entries:

Team Name	Lowercase Name	Pause	Edit	Delete
<b>Ghana</b>	ghana			
<b>Kenya</b>	kenya			

→ 2 teams : *Ghana* and *Kenya*

# Roles management



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## User roles and permissions

[+](#) Create role [↻](#) Refresh [?](#) Help

### Ghana - Data collection only

Permission to see and collect data for all forms owned by Ghana

ID: ghana\_COLLECTOR

### Ghana - Data manager

Permission to see and collect data for all forms owned by Ghana, plus permission to view and download data for all forms and datasets owned by Ghana

ID: ghana\_DATA\_MANAGER

### Ghana - Form and data manager

Permission to see and collect data for all forms owned by Ghana, permission to view and download data for all forms and server datasets owned by Ghana, and permission to add, edit, or delete all forms and datasets owned by Ghana, plus permission to view and download data for all forms and datasets owned by Ghana

ID: ghana\_FORM\_MANAGER

### Ghana - Form, data and user manager

Permission to see and collect data for all forms owned by Ghana, permission to view and download data for all forms and server datasets owned by Ghana, and permission to add, edit, or delete all forms and datasets owned by Ghana, plus permission to view and download data for all forms and datasets owned by Ghana, and permission to add, edit, or delete users

ID: ghana\_MANAGER

### Kenya - Data collection only

Permission to see and collect data for all forms owned by Kenya

ID: kenya\_COLLECTOR

### Kenya - Data manager

Permission to see and collect data for all forms owned by Kenya, plus permission to view and download data for all forms and datasets owned by Kenya

ID: kenya\_DATA\_MANAGER

### Kenya - Form and data manager

Permission to see and collect data for all forms owned by Kenya, permission to view and download data for all forms and server datasets owned by Kenya, and permission to add, edit, or delete all forms and datasets owned by Kenya, plus permission to view and download data for all forms and datasets owned by Kenya

ID: kenya\_FORM\_MANAGER

### Kenya - Form, data and user manager

Permission to see and collect data for all forms owned by Kenya, permission to view and download data for all forms and server datasets owned by Kenya, and permission to add, edit, or delete all forms and datasets owned by Kenya, plus permission to view and download data for all forms and datasets owned by Kenya, and permission to add, edit, or delete users

ID: kenya\_MANAGER

### Administrator (full access, plus subscription management)

Full administrator permission system-wide, including permission to manage the SurveyCTO subscription

ID: GLOBAL\_ADMIN

# Role management :

The following **roles** provide access to surveys for the following **groups**:

Name of the role	Ghana Group	Kenya Group	Africa
Ghana - ...	✓	X	✓
Kenya - ...	X	✓	✓
Administrator	✓	✓	✓



The same **role** can be assigned to several **users** (for example, several enumerators).

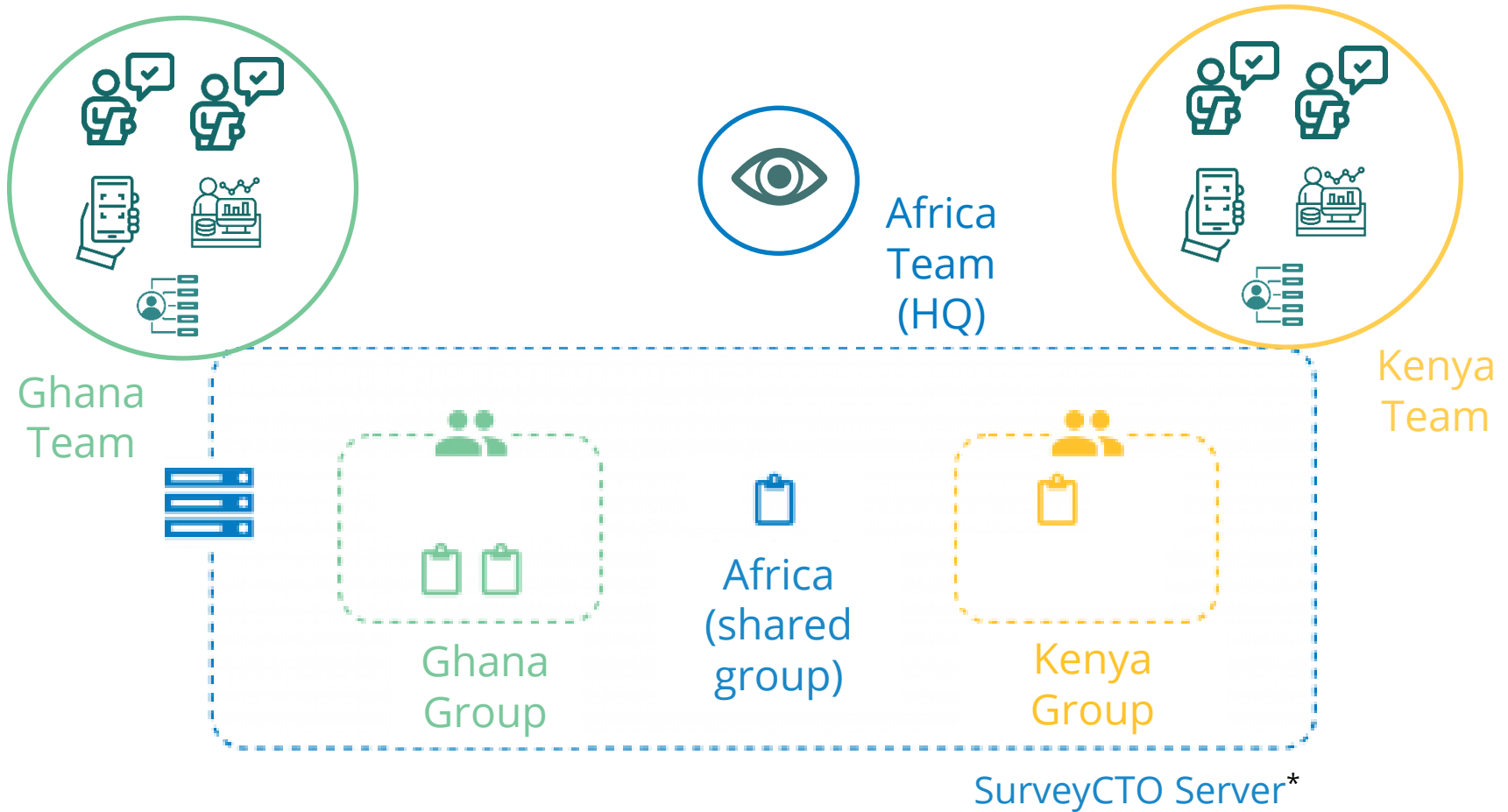
**A single user can only have one role.**

# Conclusion scenario



# Proposed organization on SurveyCTO:

Schematically, we would have all of these roles (*Ghana, Kenya and HQ*).



# 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**
- **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
- **Workflows** of a SurveyCTO form
- **Automated quality checks** on SurveyCTO
- Data **filtering** before downloading on the SurveyCTO server
- **Bulk data deletion** on the SurveyCTO server

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