Authoring Custom Field Forms 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) on the web or in the field using a mobile device. You can 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.

> **1 - Building Custom Field Forms**

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 Spectrum 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 Epicollect works. Go to https://spectrum.chat/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 form using 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.

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."

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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.

   📁 My Projects   ⊕ Create Project   🔍 Find Project

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. Create a unique name for your form.
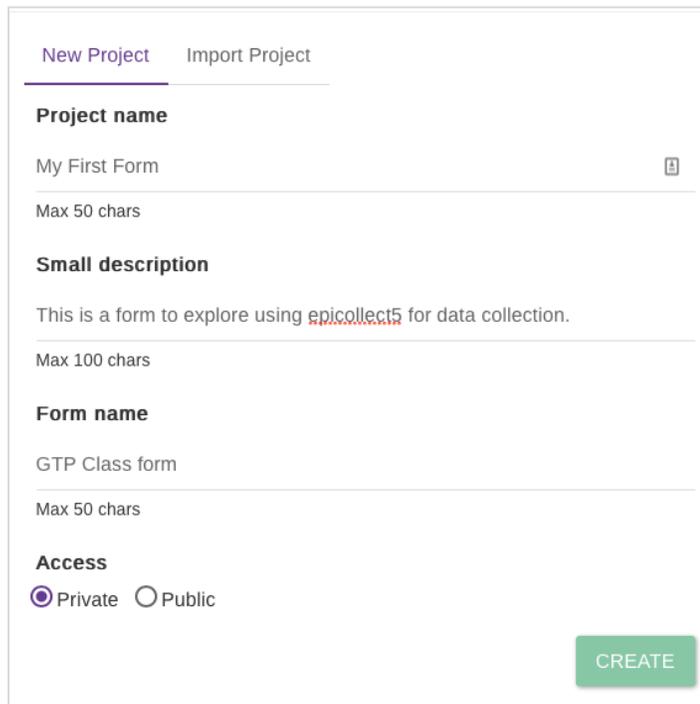
New Project	Import Project

   Project name

   My First Form

   Max 50 chars

   Small description

   This is a form to explore using epicollect5 for data collection.

   Max 100 chars

   Form name

   GTP Class form

   Max 50 chars

   Access
   ⦿ Private ○ Public

   CREATE

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. It may be wise to keep your form private until it is polished and complete.

4. Click "**Create**."

5. In the window that opens, select "**OK, open formbuilder now**."
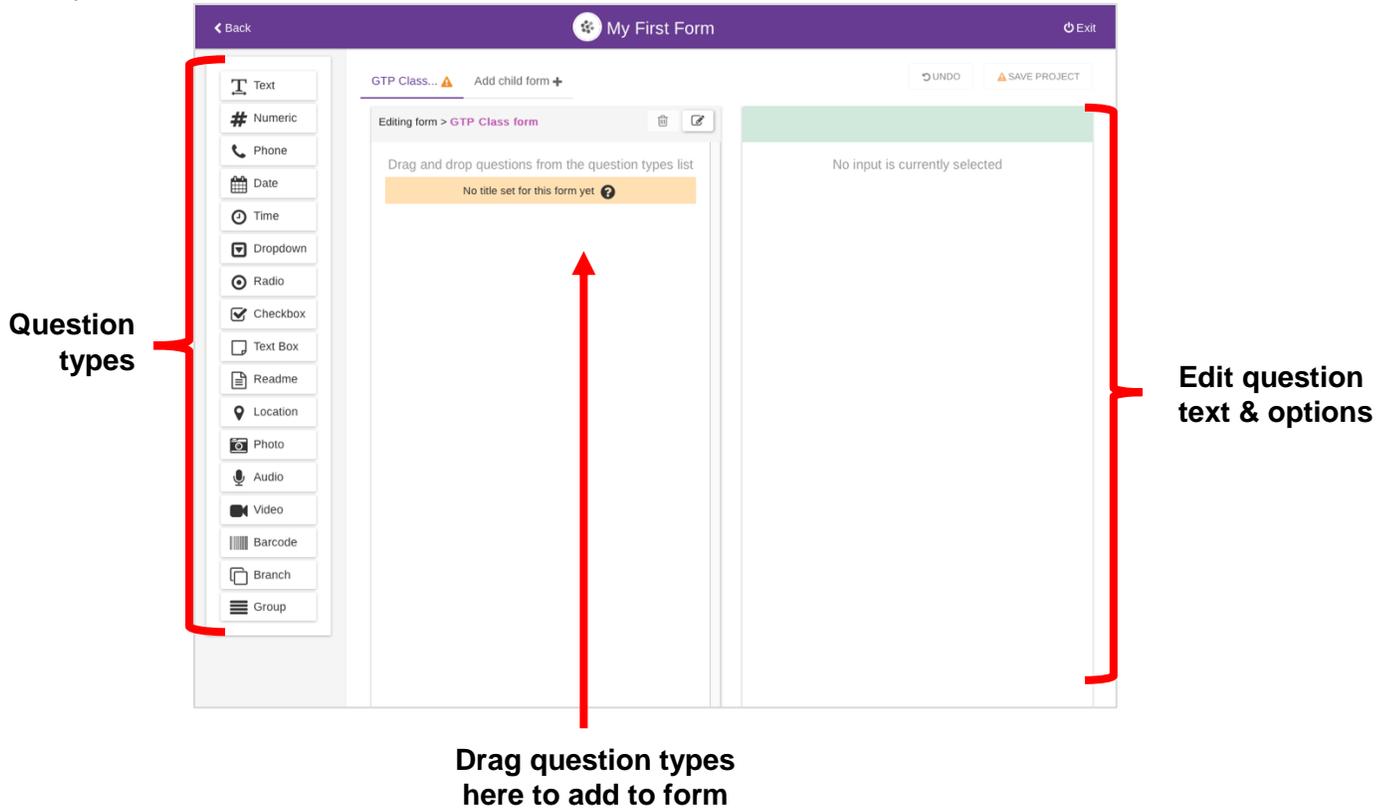
   OK, OPEN FORMBUILDER NOW

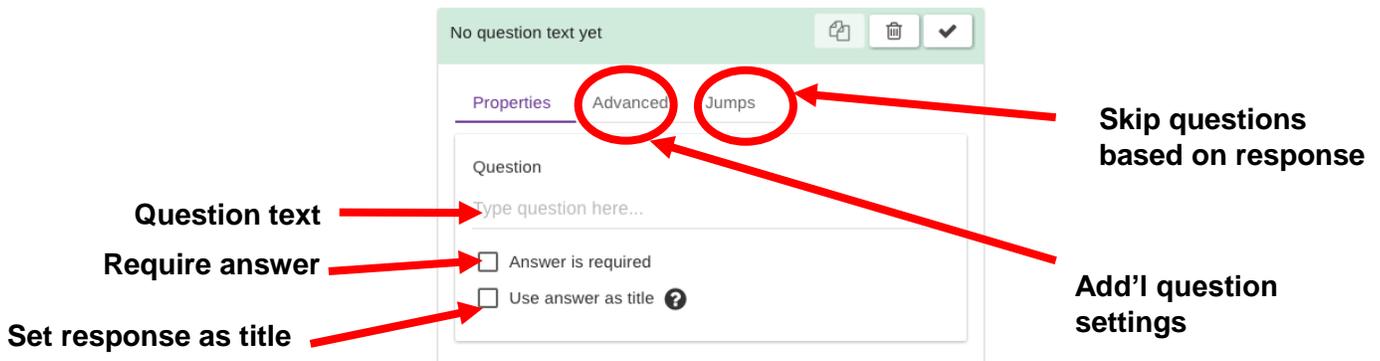# Authoring Custom Field Forms with Epicollect5
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Design Your Form

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

Question types → (left column)

Edit question text & options → (right column)

Drag question types here to add to form ↑ (middle column)

Add fields:

1. In the far left column **click and hold** on the 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 below to understand your question options.

Question text → Type question here...

Require answer → Answer is required

Set response as title → Use answer as title

Skip questions based on response → Jumps

Add'l question settings → Advanced

3. Type in a question prompt under "question". 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.

8. Once you have completed all of the necessary setting 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. **The value stored is timezone independent.**
Time	An input to enter the time, it will use a date picker on the mobile device. **The value stored is timezone independent**
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. More info
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 (what barcodes do you support?)
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

Save your project

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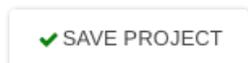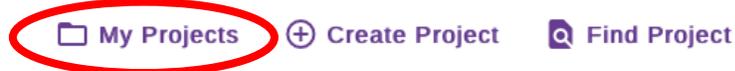
✔ SAVE PROJECT

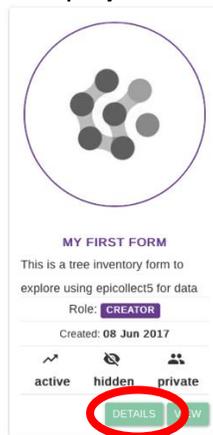2. Once your project is saved, leave the formbuilder by clicking **Exit**.

Edit Project Settings

Once you have created a project and form, you can also edit your project details and settings.
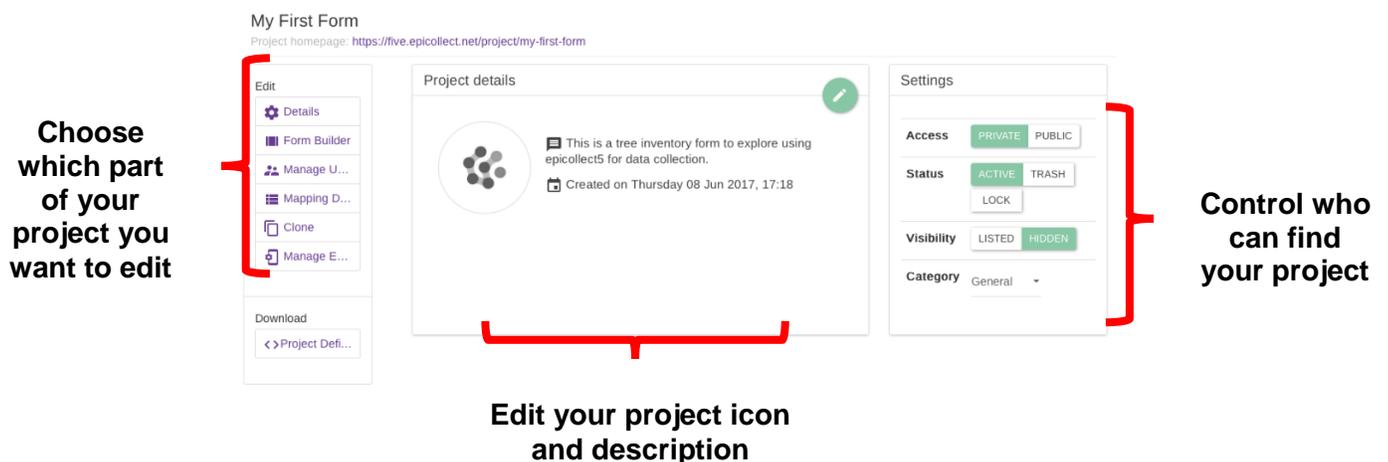
1. Assuming you are still logged in to your account on Epicollect, select **My Projects** from the top menu bar to view all of your projects.

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

MY FIRST FORM
This is a tree inventory form to explore using epicollect5 for data
Role: CREATOR
Created: 08 Jun 2017

active   hidden   private

DETAILS   VIEW

3. 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 below explains what you can do with each of the edit menu items:

Choose which part of your project you want to edit

Control who can find your project

Edit your project icon and description

Add Users

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

5. 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.

6. To add another authorized user, select **Add Users**.

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 base on the options above using the **Role dropdown menu**. Select **Add User**.
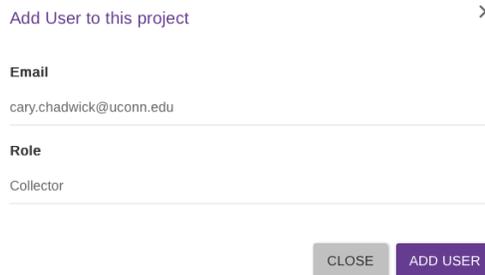
8. Any person you add should now appear under the tab for their assigned role.

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 on page 9.

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.)
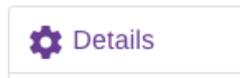
Making your Project Public

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.
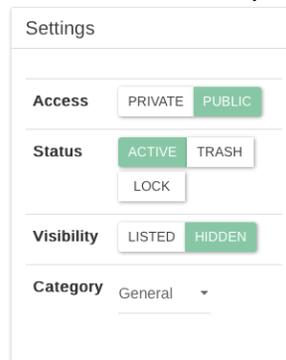

Access your Form from a Mobile Device

1. If you have not already done so, **download the Epicollect5 mobile app** to your smartphone or tablet using your device's app store. Just search for **Epicollect5**.

2. Open the **epicollect5** app on your device.

3. The app will open to the **Projects** screen. Select **Add Project**.
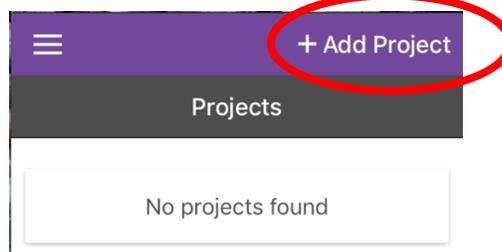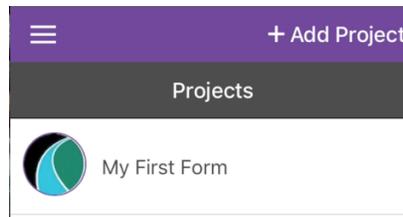
4. In the **Search for a project** box, enter the **name of the project** you created on the Epicollect website or the name of a project a friend created.
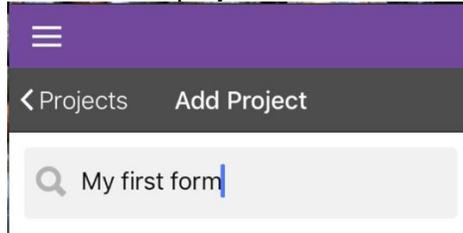
5. When your project appears below the search box, **select** it. (If it doesn't show up make sure you have the right project name.)

6. Your project will then load and appear on your **Projects** screen. **Select** it by tapping on it.

You have now loaded your form on your mobile device and can begin collecting data.

Sharing your Form with Others

To share your form with others so that they can also collect data under your project, ask them to download the Epicollect5 app to their device.
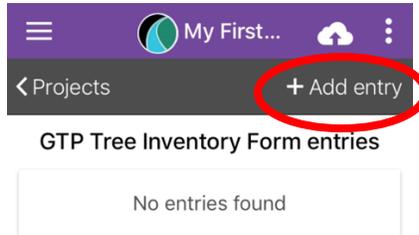
Give them the project name and have them follow the steps above to open it on their device. They can then follow the steps below to begin collecting data. If they are having trouble finding your project, you can also send them a direct link (URL).

Collecting Data

1. To start collecting data on your form, select **Add entry** from your project page.

2. Your form will open. **Fill it out**.

3. When you finish filling out the form, select **Save entry**.

4. Once your entry is saved, you will return to your project screen. To continue collecting data at another location, select **Add entry** again.

5. Note that the data you collect is saved to your device, but is not automatically saved to the Epicollect website.

6. To save your data to the Epicollect website, select **Upload now**. You can either do this after each entry or when you are done collecting data.
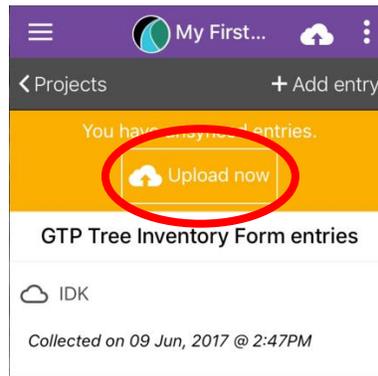
7. The upload data screen will open. Select **Upload data**.
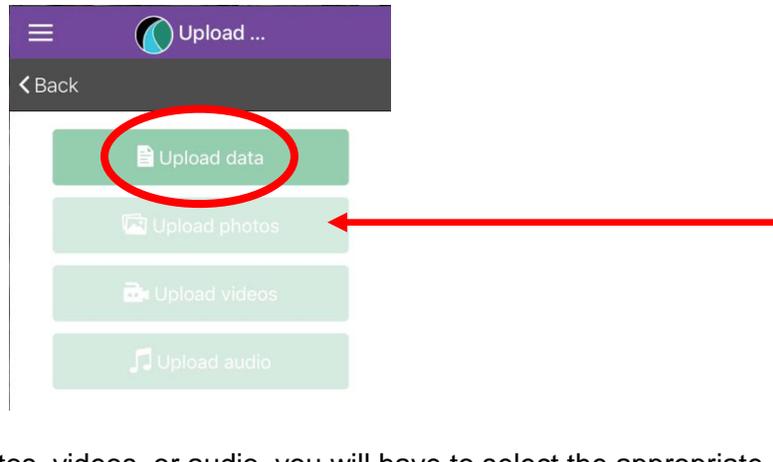
8. If you have collected photos, videos, or audio, you will have to select the appropriate button for each of those to save them to the Epicollect website, after the data is uploaded.

Congratulations! You made a custom Epicollect form and added a new entry using the mobile app. Now go forth and collect more data!