## **Prerequisites**

You have designed and produced an ODK XForm

You have logged in to [CABI CKAN Data Repository](https://ckan.cabi.org/) using your CABI CKAN login

You have navigated to a CKAN project where you have permission to manage datasets

## **Stage 1: Uploading forms and testing**

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|  | **Task Description** | **Action** |
| 1.1 | Navigate to the ODK dashboard of the CKAN project | **Project** > **ODK** tab > **Forms** |
| 1.2 | Select xlsx xform file to upload | * **Choose file** button * Select the xform file * **Publish** button |
|  | If successful your form should appear in the list below labelled “For testing”  If an error message appears here check that your xlsx for meets the [XForm](https://xlsform.org/en/) format |  |
| 1.3 | Add media to your form (optional)  If you want to show media, such as images in your form then add them here. You must refer to these filenames in your xform. | * Click the **manage media files** button      * **Choose file** button * Select the media files * **Upload** button |
| 1.4 | Add new collaborators or collaborator groups. Go to the ODK dashboard and add/edit collaborators as required  This is creating an ODK ‘user’. Note this is separate from a CKAN user/account | (To add a single collaborator)  **Project** > **ODK** tab > **Collaborators**   * Click the **+ Add collaborator** * Fill in collaborator details and password * Click **Add collaborator**   Or  (To add collaborators to groups)  **Project** > **ODK** tab > **Collaborator groups** |
| 1.5 | Assign collaborators to the form. Go to the form view and assign collaborators or collaborator groups. | (To assign a single collaborator)   * Click the **collaborator** button * Click the **+ Join collaborators** * Select the collaborator from the dropdown * Tick **Can submit data** * Click the **Join collaborator** button |
| 1.6 | Send the form out to users for testing using the ODK Collect app. Make sure users have been signed up as collaborators. Send the user their ODK collaborator details and the ODK Collect Settings (e.g. <https://ckan.cabi.org/odk/demo>) | **Project** > **ODK** tab > **Forms**  Above the table of forms there is an **ODK Collect Settings** URL |
| 1.7 | Collect feedback on the form from testing and update xform as required | Click the U**pdate xlsx** button to upload a newer version of your form |
| 1.8 | Check the submitted test data to make sure you have captured everything you had planned | Click the **Download testing data in CSV format** button to view the test data |

## **Stage 2: Publishing a form**

Once you have completed Stage 1 and you are happy with your form and data outputs you can publish it to collect live data. Note that it is difficult to make edits to forms during the middle of a large data collection campaign so make sure your form and data outputs have been thoroughly tested by all interested parties.

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| 2.1 | Upload your form to the CKAN project where you want your live data to be stored. Note this may be a different project to where you carried out the testing, if so, navigate to the ODK dashboard of the CKAN project and complete the upload process from Stage 1 | (see above) |
| 2.2 | Promote your form from **testing** to **final stage (**published) | * Click the **create repository** button      * Select a **Primary key**. This should be a unique value from your form. You could use the ODK automated start time value. You can’t use a field that is in a repeatable group. |
|  | If successful your form should now appear in the forms list labelled as **With repository**  If an error message appears here, check that your xlsx for meets the [XForm](https://xlsform.org/en/) format and that you have entered a valid primary key |  |

## **Stage 3: Create a dataset to hold/share your incoming ODK data**

Once you have completed Stage 2 and your form is live you can create a **dataset** which will allow you to share the incoming ODK data through the CABI CKAN data repository (rather than in the ODK settings).

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| 3.1 | From the ODK form list, copy the data download link | **Project** > **ODK** tab > **Forms**   * Go to the form you want to share data from and click the **Show access links** button      * Copy the **Link for the CKAN resource** to somewhere you can access it later. |
| 3.2 | Navigate to the CKAN project where you want to host a version of you ODK form data. Note this can be different to the project where you have set up the ODK form | **Project** > **Datasets** tab |
| 3.3 | Add an ODK dataset to the CKAN project | * Click the **+ Add Dataset** button      * Add metadata details for the dataset including whether this dataset should be ‘public’ or ‘private’ * Click **Next: Add Data** button      * Click the **Link** button and add the **Link for the CKAN resource** that was collected in 3.1      * Enter metadata details and set **Resource type** as **ODK Repository** |
| 3.4 | Add media download link as additional resource | * In the dataset **resources** tab click to **+ Add new resource** * Repeat steps in 3.3 but replace “/**xlsxdownload**” in the resource URL with “/**mediadownload**” |
|  | Now your ODK data can be accessed separately from the ODK form view. This may be useful if you are working with different teams who are independently collecting and analysing the data. It also allows you to record metadata against the ODK dataset |  |