



## Magpi Mobile Data Collection QUICK GUIDE

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## What can Magpi do?

Magpi makes it very easy and inexpensive to collect data using phones and tablets instead of paper forms. You can create and configure electronic forms on Magpi. Your respondents fill out the forms by SMS or through an app. Magpi stores, analyzes, and presents this data in several formats.

## How to be successful at mobile data collection

Magpi is a powerful and simple tool to help you easily and inexpensively collect data in the field – much more easily and expensively than ever before. Still, there are a number of important things to keep in mind when you are creating forms or collecting data in the field – and these will dramatically increase your chance of success:

1. **Test the form** – never go to the field without extensively testing your form well in advance of your field activity
2. **Test the hardware** – never go to the field without testing your form on the same kind of phone that will be used in the field, well in advance of your field activity. Longer forms require more memory, which usually means a more expensive phone, so do not plan to collect data with a 500 question survey on a \$30 basic phone.
3. **Allow adequate time to register all users** – if you have many data collectors or other users to be registered, do not leave it until the last minute, just in case you have problems with connectivity. Register everyone at least several days in advance, and confirm that they are able to log into the system on the phone and, if needed, on the web.
4. **Allow adequate time to train your field team** – our standard training protocol allows five full days for training, including practice data collection in the field followed by classroom review. Two hours of training is not adequate. Have your data collectors practice in the field, with the correct form, for at least several hours before the “real” data collection activity.
5. **Plan for connectivity problems** – even if you are planning to upload data directly from the field, poor network connections may make this impossible. Make sure your field staff know what to do if they cannot upload data (for example, they can just plan to bring the phone to the office at the end of the activity). Make sure they understand that the data will be safely stored on the phone for as long as necessary.
6. **Tell us quickly about any problem** – the sooner you contact our support team, the sooner they can help. **The fastest way to get help is to email [support@datadyne.org](mailto:support@datadyne.org)** (not to email or call a friend at DataDyne, or info@datadyne.org or anyone else).

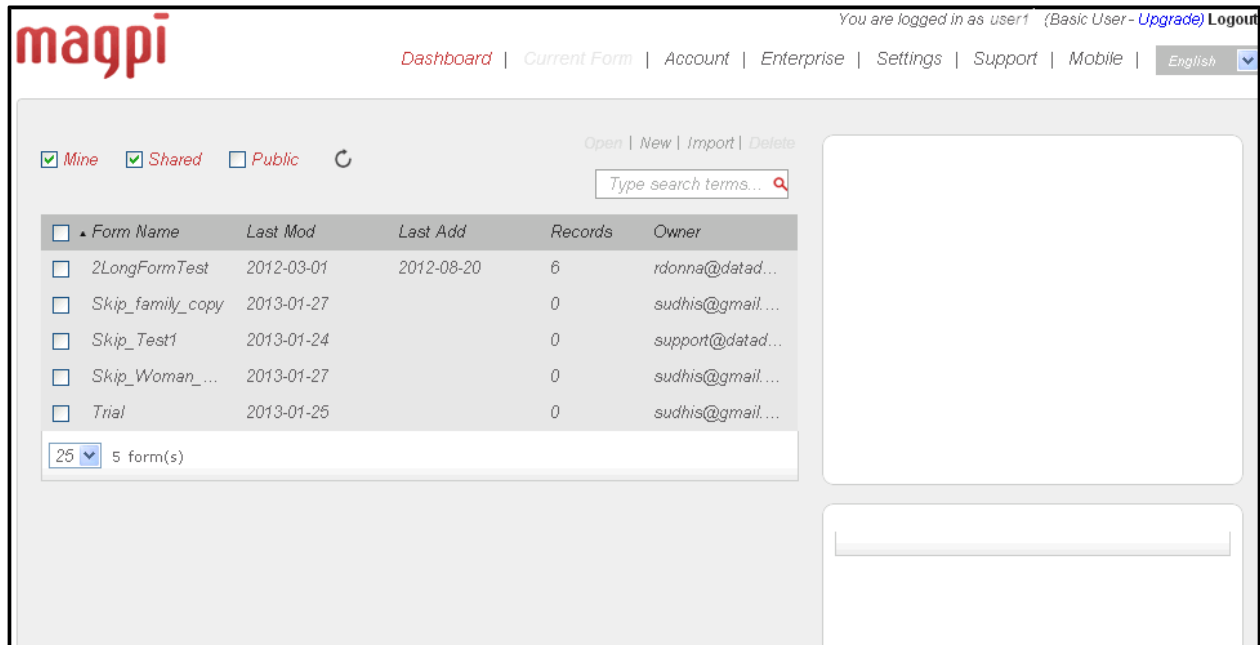
## Getting Started

1. Register with your email id at [www.magpi.com](http://www.magpi.com).
2. Verify the link sent to your email id.

## Getting Around

### Dashboard

When you first log in you will see the dashboard (figure 1). The dashboard shows all the forms that you have created or those that others have shared with you.



The screenshot shows the Magpi dashboard interface. At the top left is the Magpi logo. The top right corner displays the user's login status: "You are logged in as user1 (Basic User - Upgrade) Logout". Below the logo is a navigation menu with links: "Dashboard", "Current Form", "Account", "Enterprise", "Settings", "Support", "Mobile", and "English" (with a dropdown arrow). The main content area features a filter section with checkboxes for "Mine" (checked), "Shared" (checked), and "Public" (unchecked), along with a refresh icon. To the right of the filters are links for "Open", "New", "Import", and "Delete", and a search box labeled "Type search terms...". Below this is a table listing forms:

<input type="checkbox"/>	Form Name	Last Mod	Last Add	Records	Owner
<input type="checkbox"/>	2LongFormTest	2012-03-01	2012-08-20	6	rdonna@datad...
<input type="checkbox"/>	Skip_family_copy	2013-01-27		0	sudhis@gmail...
<input type="checkbox"/>	Skip_Test1	2013-01-24		0	support@datad...
<input type="checkbox"/>	Skip_Woman_...	2013-01-27		0	sudhis@gmail...
<input type="checkbox"/>	Trial	2013-01-25		0	sudhis@gmail...

At the bottom of the table, there is a pagination control showing "25" in a dropdown menu and "5 form(s)".

Figure 1: The Dashboard

## Creating a new survey form

1. Login to [www.magpi.com](http://www.magpi.com).
2. In the Magpi dashboard, click **New** above the search box. A screen for creating questions in the form opens (Figure 2). This screen is called the Design Tab (note the highlighted Design tab in Figure 2).

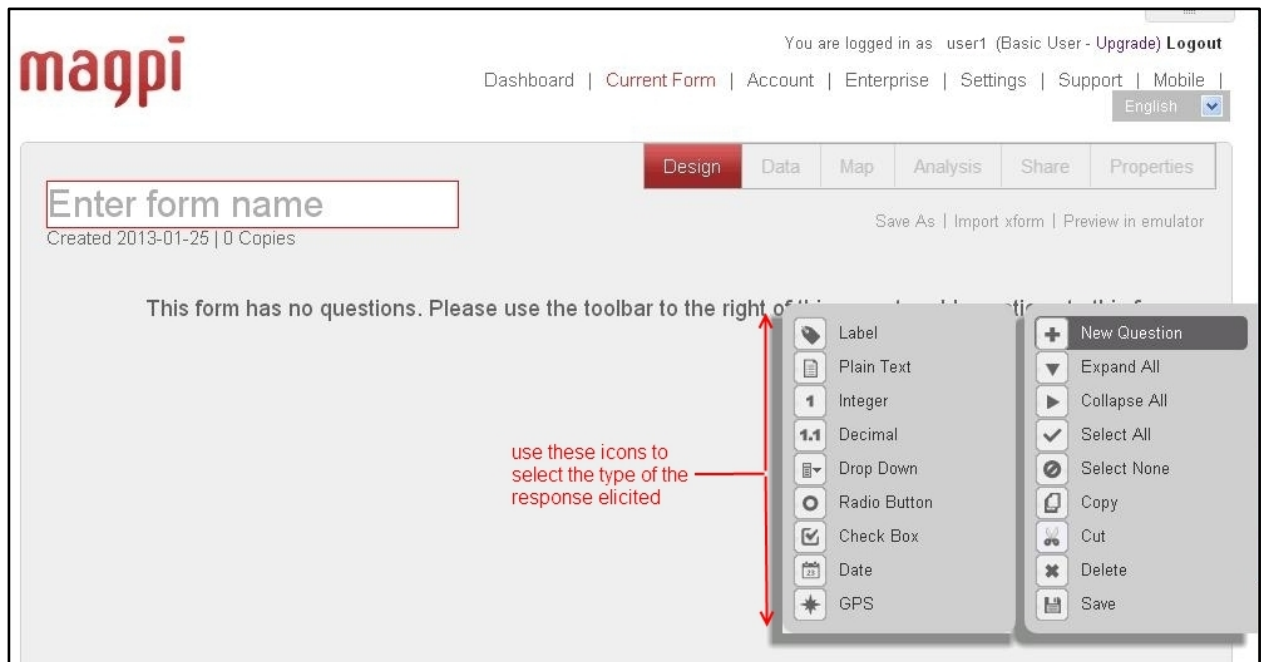




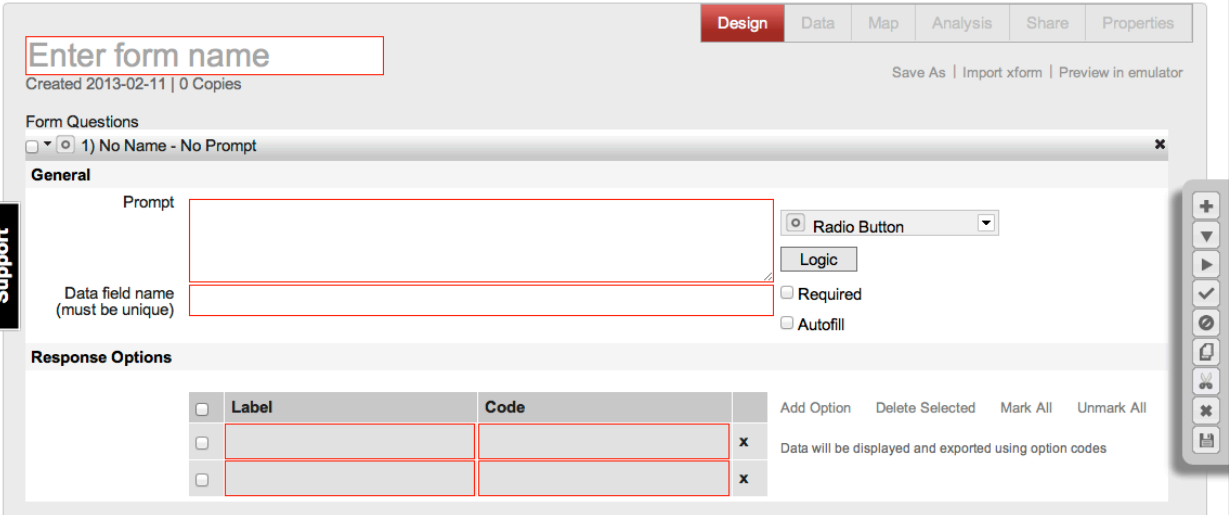
Figure 2: Creating a form using the commands on the toolbar

3. In the **Form name** box, enter a name for the new form.
4. Click  to save (it's always a good idea to save frequently as you create or edit a form).

## Add questions to your form

1. Choose “New Question” from the toolbar at the right of the screen (using the  icon). As you click on or hover over the New Question command, the toolbar expands to a sub menu showing the types of new questions you can add that you can set for a question (see Figure 2).
2. Select the question type from the submenu.

After you choose a question type, the question will appear on the left area of the screen, with a variety of parameters that you must set. For example, in Figure 3 you can see the parameters that must be set for a radio button question (a type of multiple choice that allows the user to pick only one option):

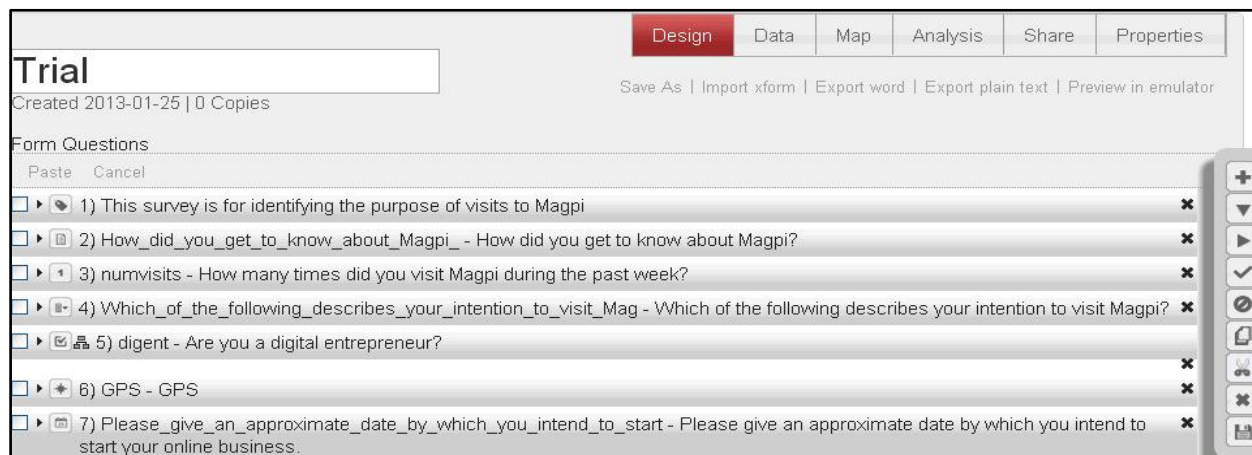


The screenshot shows a software interface for designing a form. At the top, there are tabs for 'Design', 'Data', 'Map', 'Analysis', 'Share', and 'Properties'. Below the tabs, there is a text input field for 'Enter form name' and a status bar indicating 'Created 2013-02-11 | 0 Copies'. On the right side, there are buttons for 'Save As', 'Import xform', and 'Preview in emulator'. The main area is titled 'Form Questions' and shows a list of questions, with the first one being '1) No Name - No Prompt'. A 'Support' sidebar is visible on the left. The configuration panel for the selected question is shown, with sections for 'General' and 'Response Options'. In the 'General' section, there are input fields for 'Prompt' and 'Data field name (must be unique)'. A dropdown menu is set to 'Radio Button', and there are checkboxes for 'Required' and 'Autofill'. In the 'Response Options' section, there is a table with columns for 'Label', 'Code', and a selection column. The table has two rows, each with a checkbox, an empty 'Label' field, an empty 'Code' field, and an 'x' in the selection column. To the right of the table are buttons for 'Add Option', 'Delete Selected', 'Mark All', and 'Unmark All'. Below the table, it says 'Data will be displayed and exported using option codes'. On the far right, there is a vertical toolbar with various icons for navigation and editing.

Figure 3: Adding a Multiple Choice Question

3. Enter the “Prompt”: this is the text that will appear on the screen of the phone or tablet.
4. Enter the “Data Field Name”: this is the name of the data variable that will appear at the top of the relevant column in the dataset.
5. Enter the response options where applicable.

Note: for multiple choice questions you will need to specify the “Response Options”. These must have a “label”, which is what will appear on the phone screen for that choice. Optionally, you can also define “codes” that will appear instead of the labels in the dataset. For example, you could have “Yes” and “No” appear as the choices on the phone, but have “1” and “0” appear in the data set (1 for every time the respondent said Yes and 0 for no).



**Figure 4: A list of questions in a form**

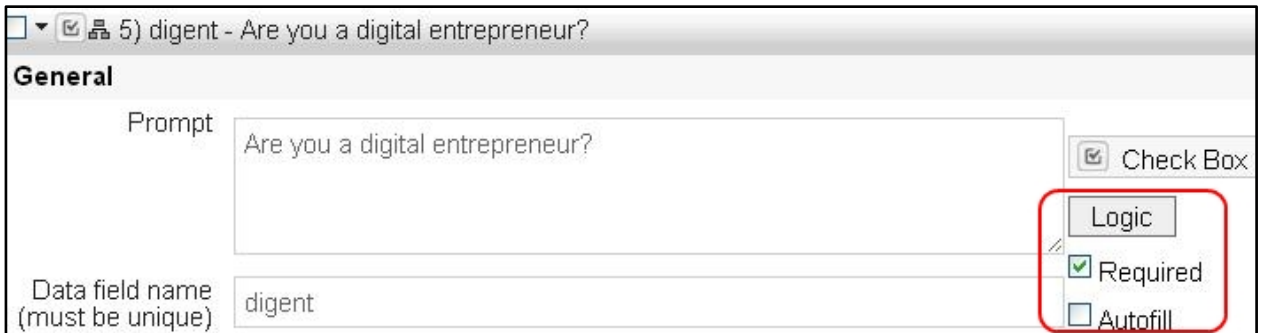
Question Type	Purpose	Keyboard shortcut	Data field name	Additional options
Label	This does not create a question; it displays information on the screen of the mobile device	Ctrl+	NA	NA
Plain text	User can enter text information	Ctrl+F	Required	NA
Integer	For integer responses (0, 1, 2, 3...)	Ctrl+E	Required	Provide minimum and maximum integer values
Decimal	For decimal value responses (.04, 1.01 etc.)	Ctrl+D	Required	Provide minimum and maximum values
Drop down	User can select a single response from the options that you provide (multiple choice)	Ctrl+P	Required	Provide the possible response options for the question
Radio button	User can select a single response from the options that you provide (multiple choice)	Ctrl+R	Required	Provide the possible response options for the question
Check box	User can select <u>several</u> responses from the options you provide (multiple choice)	Ctrl+K	Required	Provide the possible response options for the question
<u>Date</u>	User can enter a date	Ctrl+Q	Required	NA
<u>GPS</u>	To collect the location information	Ctrl+G	Required	NA

**Figure 5: List of Question Types**

## Adding Skip Logic

You can have Magpi jump over certain questions depending on the response to previous questions. For example, if you have a question asking “Gender? Male or Female”, if the person answers “Male” you can skip over the questions pertaining to pregnancies.

1. To insert logic, click the **Logic** button (Figure 4).



5) digent - Are you a digital entrepreneur?

**General**

Prompt: Are you a digital entrepreneur?

Data field name (must be unique): digent

Check Box

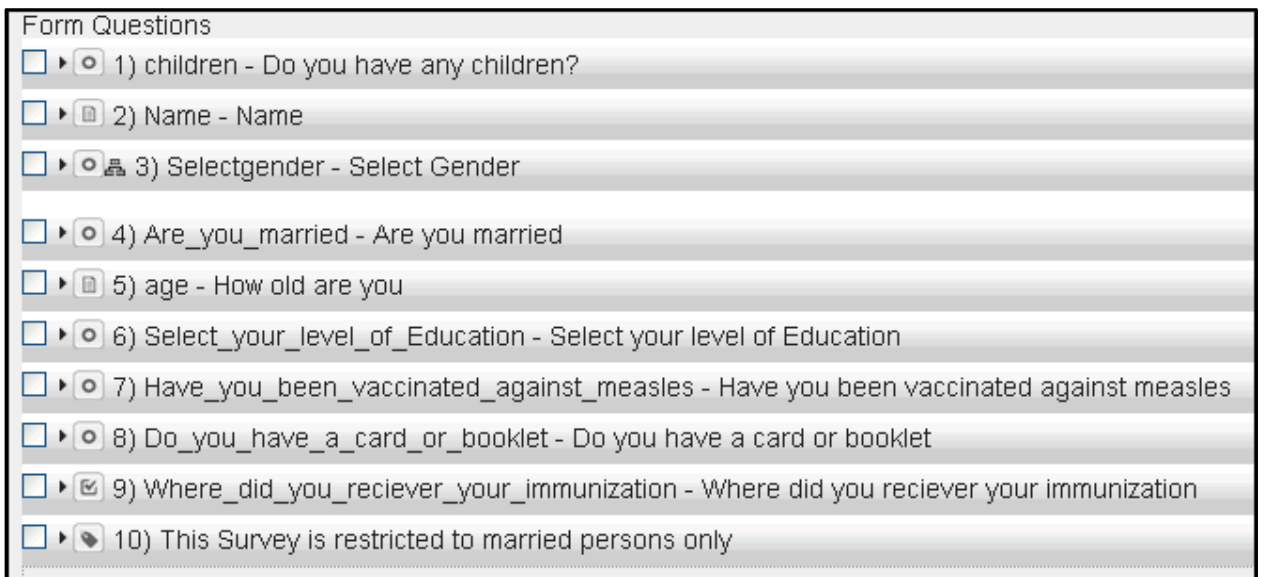
**Logic**

Required

Autofill

**Figure 5: Special functions**

2. By selecting from the multiple pulldown menus in the Logic window (Figure 6), select the combinations of logical steps that you want Magpi to perform. See the following example form (Figure 6) which uses the **IF** condition (Figure 7):



Form Questions

- 1) children - Do you have any children?
- 2) Name - Name
- 3) Selectgender - Select Gender
- 4) Are\_you\_married - Are you married
- 5) age - How old are you
- 6) Select\_your\_level\_of\_Education - Select your level of Education
- 7) Have\_you\_been\_vaccinated\_against\_measles - Have you been vaccinated against measles
- 8) Do\_you\_have\_a\_card\_or\_booklet - Do you have a card or booklet
- 9) Where\_did\_you\_reciever\_your\_immunization - Where did you reciever your immunization
- 10) This Survey is restricted to married persons only

**Figure 6: Sample form**

If you want to restrict the sample form in Figure 6 to married persons, use the logic in Figure 7 (the Question Logic window pops up when you click the Logic button): If participants' marital status is “**No**” for question 4, the form jumps to question 10: “This survey is restricted to married persons”.



Figure 7: Using the IF logic

## Making a question required










3. To make a question mandatory, select the **Required** checkbox (Figure 5). Users will not be able to skip these questions.

## Auto filling

To enable Magpi to auto fill, select the **Autofill** checkbox (Figure 5). Magpi fills in the response to a question with the answer from the previous question. For example, if you have a free text question called “Village Name”, and you will have many respondents from that village (ie, many forms to fill), if you make Village Name autofill, when you get to the household of the second respondent, the field will be filled automatically with the value from the first household (you can always edit the value, however). Each time you change the value in the field, subsequent households will have the new value.



## Miscellaneous form editing functions

Function	Click	Keyboard shortcut
Select a question/s	Checkbox adjacent to the question/s	
Delete selected questions		<b>Ctrl+Shift+D</b>
Copy a question		<b>Ctrl+Shift+C</b>
Cut a question		<b>Ctrl+Shift+X</b>
Expand all questions		<b>Ctrl+Down</b>
Collapse all questions		<b>Ctrl+Up</b>
Select all questions		<b>Ctrl+A</b>
Deselect all questions		<b>Ctrl+U</b>
Save changes		<b>Ctrl+S</b>
Paste a question	Click <b>Paste</b> beneath the question where you want to paste the copied/cut question.	NA
Delete question	Click  icon adjacent to question	

## Exporting form description to Microsoft Word format

You can export forms to Word in order to have a copy to view in meetings, or a backup copy for the field by clicking **Export word**

## Previewing your form

To preview the form you created:

Click **Preview in Simulator**.

This also lets you test response patterns and the logic patterns you created. Note that you will need to have the latest version of Java installed on your computer (and Java is very frequently updated).

## Copying a form

To create a copy of a form on Magpi, first open the form and then click **Save As**. This creates a copy without any of the data from the original. You can edit the name of the copied form, of course.

## Installing Magpi on your phone or tablet

### Installing the Magpi mobile app (for all operating systems except iPhone/iPad/iPod touch)

#### Downloading the Magpi mobile app to your laptop or desktop, then transferring to the phone or tablet

1. Login to [www.magpi.com](http://www.magpi.com) from your laptop/desktop
2. Click the **Mobile** tab to see a list of mobiles/operating systems (OS) compatible with Magpi.
3. Click the name of your phone/OS (you can go directly to this at [www.magpi.com/m](http://www.magpi.com/m))
4. Download the app
5. Transfer the app file to your mobile phone or tablet.
6. If you have not logged into Magpi, you can also use the **Download Mobile App** link on the [magpi.com](http://magpi.com) home page.

#### Downloading the Magpi mobile app directly to your phone or tablet

1. Open [www.magpi.com/m](http://www.magpi.com/m) in the phone's web browser.
2. In the list, click the phone model that is closest to your phone.
3. When your phone prompts before installing Magpi, click **Yes**.

Magpi installs in the application folder.

4. When the phone prompts you before running the app, click **Yes**.

### Installing the Magpi mobile app for iPhone or iPad or iPod touch

Either:

1. Follow this link: <https://itunes.apple.com/us/app/magpi/id499388914?mt=8> to locate the Magpi app and purchase it (it costs US \$1.99)

or

2. Open the App Store app on your iOS device and search for Magpi

The app is purchased like any other iOS app, and you will be automatically updated of any updates in the future (all updates are at no charge).

## Downloading forms to the mobile app

Every app has a method to download forms from the website to the phone.

For iPhone, click **Server** on the main screen.

For Android, choose **Manage Files**.

For Symbian, click the **Options** button.

## Filling out forms using the mobile app

1. Open the Magpi app on your phone and login using the same userid/password combination you used to log into magpi.com on your laptop/desktop computer.
2. Highlight the desired form in the form list and click/tap on it.
3. The app will now display the questions one by one
4. To move forward through the questions, select Options and then Next (on iOS devices you will swipe your finger from right to left to move forward)

## Filling and sending the forms using structured SMS (from any phone)

Please refer to the full Magpi user guide for information on this **paid** service.

## Uploading collected data from the mobile app

For each type of mobile app, there is a slightly different method of uploading data.

For iPhone, at the end of each form, you will have the option of uploading the record.

For Symbian, at the end of each form, you will have the option of uploading the record.

For Android, after filling in a form, you can choose **Send Completed Data** from the main screen.

## Sending by SMS

This feature is available only for Symbian phones now, not for iPhones or Androids. If you are using the Symbian phone, and internet is not available, the phone will ask you if you want to upload data by SMS. This will happen in the background.

## Sharing forms

To share a form with other users so they can download it to their phones, or view the data online and perform other functions, open the form and go to the Sharing tab.

### 3 ways to share a form: by email, by SMS, or by groups

Email	SMS	Groups
For users of the Magpi mobile app)	For users of any mobile phone	This <u>paid</u> feature lets you organize your contacts into groups and share a form with a group
1 - Go to the top section on the Sharing tab.	1 - Go to the middle section on the Sharing tab.	This feature is only available to Enterprise users. For more information, refer to the full Magpi manual, or click the <a href="#">Pricing</a> link at the main Magpi login page
2 - Add the relevant users' email addresses in the box on the right. Separate multiple addresses with a comma.	2 – Add the relevant users' mobile number in the box on the right. Only those users will be able to enter data in the form by SMS.	
3 - Select the role you wish to assign with the dropdown menu:	The number should include the country code, and no spaces or punctuation.	
FormAdmin allows all privileges	For example, a US number of (222) 222-2222 would be entered as 1202222222.	
dataManager allows collection of data on mobile and also editing online	3 - Enter the outgoing mobile message (this will be sent to all mobile numbers entered in the box above).	
mobileDataCollector allows the user to collect data with the form on a mobile device	The default message is:	
4 - Click <b>Send invitation</b>	<a href="#">From magpi.com. Form 21974 has been shared with you. Please respond by SMS in the format: 21974#firstquestion#secondquestion</a>	
The invited users will now be able to download the form to their mobile devices.	The most important part of the message is the form ID number (21974 in the example above). When sending in data by SMS, the user <b>MUST</b> start the SMS message with the correct form ID number. That will ensure that the data goes to the right form.	

## Viewing the collected data

To review the data that the responders have filled in a form, do the following:

1. From your laptop or PC, log onto [www.magpi.com](http://www.magpi.com).
2. Click the form in the dashboard list.
3. Open the form. A form with data in it will automatically open in the Data tab. At that point you can export the data or click on the Analysis tab to see a preliminary report.

## Contact Us

The Datadyne Tech Support Team is happy to assist in case of any issues at any stage of your data collection. The fastest way for us to assist you is to contact us at: [support@datadyne.org](mailto:support@datadyne.org)

You can also view our user support forums at [datadyne.zendesk.com](http://datadyne.zendesk.com)