***Day 1 – ToT, Intro to iFormBuilder***

**Day’s Objectives:**

By the end of the afternoon, meeting participants:

* Understand the advantages and disadvantages of electronic data collection in emergency response and recovery.
* Feel comfortable handling iDevices and iForm client
* Feel comfortable with administrative functions of iFormBuilder
* Can build simple forms in iFormBuilder software

# Introduction

**9:00 – 9:30**

**Facilitator: X**

**Session Objectives**

By the end of the session, participants:

* Are familiar with the facilitator and each other
* Have shared their expectations for the workshop

**Key messages**

1. Participants will not be ICT4D experts after this training. But participants will have the basic knowledge and skills to implement and design ICT4D solutions—and know what references and resources are available to support ICT4D initiatives in CRS projects/programs

**Materials**

Equipment: LCD Projector, 2-3 iDevices with Pre-Test Form uploaded

Supplies: Flip Chart, markers

| **Time** | **Method** | **Facilitation notes: Introduction** |
| --- | --- | --- |
|  | *Preparation* | * Prepare flip chart with proposed Ground Rules: * Mobile devices turned off or on silent * No email or non-training computer work during sessions * Start/end on time * ASK QUESTIONS—ASK FOR CLARIFICATION |
| 9:00 – 9:30 | *As people come into the training* | As people come in, pass out a few devices with the ICT4D pre- and post-test survey uploaded onto it. Have them fill out the form, giving light guidance as necessary – some participants might never have used an iDevice and iForm before, but it is fairly user-friendly so most should be able to complete the form with little or no help. |
| *Plenary*  *(15 min)* | * Welcome participants to the training, go through housekeeping   Introduce yourself, explaining your role in CRS, content of the training.  Ask for the support of all participants – it is a large group and I am one person. There are some “ringers” who are scattered throughout (make sure Nancy, Vera, Amy, and Jocelyn are fairly separated) but if you have grasped the topic at hand during individual exercises, please make sure the people sitting next to you are on the right track and do not need support. I’ll get to everyone in due time. ☺  Ask everyone to introduce themselves, their title and give their expectations for the workshop – put expectations on flip chart  People can continue filling out the pre-test form on the iDevice as introductions are made.  SHARE **Key Message 1:** Participants will not be ICT4D experts after this training. But participants will have the basic knowledge and skills to implement and design ICT4D solutions—and know what references and resources are available to support ICT4D initiatives in projects/programs  REVIEW **Ground Rules** flip chart. Ask if there are any additional ground rules participants would like to add. |

# SESSON 1: Introduction to ICT4E, example uses in emergency response, and when to use it

**9:30 – 10:30**

**Facilitator: X**

**Session Objectives**

By the end of the session, participants:

* Know what ICT4D stands for and how it is used in emergency response projects.
* Understand what needs to be in place and questions that need to be asked before implementing ICT in emergency programming

**Key messages**

1. ICT4D can complement many different kinds of project, but the decision about whether or not to include ICT4D as part of the tools or strategies adopted for a specific project should be made on a case-by-case basis as a part of the larger project design process.
2. When considering whether or not to introduce ICT4D into an existing project, weigh the advantages of ICT4D against things such as:

* Time remaining in the project period—is it worth the effort to introduce ICT4D given the project time remaining?
* Is the project’s existing system or approach working well—does it need to be replaced by an ICT4D system?

1. Understanding the problem you are trying to address through technology is critical to successful implementation
2. For projects that are considering an ICT4D component it is critical to involve IT team members as early as possible to assist.
3. Timing of the integration of ICT into a project should also take into consideration the longer term benefit for the organization and for the local partner/government/communities. Even if it is a short project, it could make sense to build local capacity in the use of ICT at that time, since there might be carry on projects or further emergency work.

**Materials**

Equipment: LCD Projector

Supplies: Flip Chart, markers

Handouts: 1.4.1 Key Questions for Concept Development; 1.4.2\_2014\_ICT\_analysis-tool; 1.4.3\_Group Work\_ICT4E Implementation;

| **Time** | **Method** | **Facilitation notes: Session 1 – What is ICT4D?** |
| --- | --- | --- |
| 9:30 – 11:00 | *Presentation- Session 1.1 What is ICT?*  *(5 min)* | Review the objectives for the Intro to ICT4D session:   * Know what ICT4D stands for and * How ICT4D is used in emergency response projects.   **ASK**: **What is ICT4D?**  Advance slide with ICT4D acronym and definition (source: GKIM)  **ASK**: **What is ICT4*E*?**  Advance slide with ICT4E acronym and toolkit |
| *Plenary*  *- Session 1.2*  *(10 min)* | **ASK: How is your organization using—or planning to use—ICT4D?**  Allow time for participants to respond. Note responses on a flip chart.  As required and as time permits, **probe for experience/lessons** from country programs already doing ICT4D:   * What were some of the biggest challenges as you were designing your ICT4D solution? * What is something you wish you had known—or had thought of—when you were beginning your ICT4D work? |
| *Presentation*  *- Session 1.3*  *(5 min)* | REVIEW the different examples of the use of ICT in emergency response, together with their advantages and disadvantages. |
| *Plenary (10 min) Session 1.4* | **ASK: Do participants agree or disagree with the statement “ICT is appropriate for every project”?**   * Write down on flip chart reasons for disagreeing and agreeing.   **ASK: What key information is needed when deciding whether or not to integrate ICT4D into a project?**   * Put these on a flip chart.   SHARE **Key Messages:**   * **Key Message 1: ICT4D can complement many different kinds of project, but the decision about whether or not to include ICT4D as part of the tools or strategies adopted for a specific project should be made on a case-by-case basis as a part of the larger project design process.** * **Key Message 2: When considering whether or not to introduce ICT4D into an existing project, weigh the advantages of ICT4D against things such as:** * **Time remaining in the project period—is it worth the effort to introduce ICT4D given the project time remaining?** * **Is the project’s existing system or approach working well—does it need to be replaced by an ICT4D system?** * DISTRIBUTE Handout 1.4.1. * Review the “**Know before you go!**” slide (*slide 22*) detailing the Key Questions to ask during the ICT4E Concept Design:  1. What is the **problem(s)** you are trying to address?   SHARE **Key Message 3:**  **Understanding the problem you are trying to address through technology is critical to successful implementation**   1. What is the **ICT landscape** in the country and project area?   SHARE **Key Message 4:**  **For projects that are considering an ICT4D component it is critical to involve IT team members as early as possible to assist. This does not necessarily need to be GKIM but does need to be someone who can assist in a proper analysis.**   1. What is the **ICT4D landscape** in the project area and for the problem(s) you seek to address? 2. Who are the project’s potential ICT4D **users**? 3. Who are the project’s ICT4D **beneficiaries**? 4. Who are the project’s ICT4D **implementers**? 5. How much **time** is needed **to develop and test** the solution?   SHARE **Key Message 5:**  **Timing of the integration of ICT into a project should also take into consideration the longer term benefit for the organization and for the local partner/government/communities. Even if it is a short project, it could make sense to build local capacity in the use of ICT at that time, since there might be carry on projects or further emergency work.**   1. Does the project have **money** to cover the cost of an ICT4D solution?   As needed explain what the terms/concepts in the Key Questions mean: ICT landscape; ICT4D landscape; for users/beneficiaries knowing about literacy, mobile access, mobile literacy, reaction to proposed solution; implementer’s capacity and buy-in; time required to develop and test different types of ICT4D solutions; must have a budget. |
|  | *Session 1.5*  *Group work (30 min)*  *Plenary Report*  *(15)* | Divide participants into sector groups (General ERR, Livelihoods, Health/Hygiene)  Distribute Handout 1.4.2 (Group Work, Exercise 1)  Work through key questions for specific groups (30 min) then have the different groups report back in plenary.  **Refer to** 1.4.2 2014\_ICT\_analysis\_tool as potential resource. |

COFFEE BREAK until 11:30am

# SESSION 2: Device Orientation - Enumerators iOS7

**11.30 - 12:00**

Facilitator: X

**Session Objectives**

By the end of the session, participants:

* Are familiar with the use of iDevices

**Key messages**

1. Devices should never be taken to the field without a protective case

**Materials**

Equipment: LCD Projector, iDevices with iOS7 software, keys for opening sim card

| **Time** | **Method** | **Facilitation notes: Session 2 – Device Orientation** |
| --- | --- | --- |
|  | *Preparation* | Make sure the iDevices have the latest iOS7 software, so that everyone can follow the presentation slides. |
| 11.30 – 12:00 | *Griffin case Exercise – in plenary*  *(10 min)* | Show first slide of presentation (Session 2 : Device Orientation), which shows ruggedized case. **Explain** the importance of case for protecting device from dust, being dropped, and (small amounts of) water. **Explain** that the case does not protect the device if it is dropped in a river or left in a puddle for a long period of time.  SHARE **Key Message 1:**  **Devices should never be taken to the field without a protective case.**  **ASK**: “Do you know how to take the case off?”  Lead the group in taking the case off the device, show them where the sim card can be inserted for devices with cellular capability. Explain how sim cards allow data to be uploaded via 3G or E network providers. Sim cards must have 3G/E connection, be activated for data/internet packages and have an active balance in order for data upload to work. (Only necessary for those managing the devices) |
| *Presentation*  *(20 min)* | Run through the remainder of the presentation, orienting the participants to how to use the device. Go as slow as necessary to make sure that everyone has time to practice each aspect a few times to get the hang of it.  Make sure that orientation is for Androids as well. |

# SESSION 3: Using the iForm Client

**12:30 – 13.00**

**Facilitator: X**

**Session Objectives**

By the end of the session, participants:

* Are familiar with how to open and use the iForm client on their devices.

**Key messages**

1. Setting up devices takes time. Make sure you plan for that device configuration time.

1. Records that have not been uploaded (torn page or hourglass icon) only exist on the device. If you delete one of these records, THERE IS NO UNDELETE, since it is not in the cloud database.

**Materials**

Equipment: LCD Projector

| **Time** | **Method** | **Facilitation notes: Session 3 – Using the iForm Client** |
| --- | --- | --- |
| 12:30 – 13:00 | *Presentation (30 min)* | Note: make sure that all devices have proper settings for the iForm Client (Autosync, Sync on Upload, Delete on Upload all set to ON; Photo size small…)  SHARE **Key Message 1:**  **Setting up devices takes time. Make sure you plan for that device configuration time.**  Using their assigned devices, have each participant open the CRS iForm client on their device and lead them through the presentation.  Have each participant open the ICT4D Workshop pre-test that was filled out before the workshop began and go through each of the fields in more detail, allowing time for questions.  Have participants sync the devices (Even if there is no data for upload).  Have each participant partially fill out survey, save it and observe the “torn page” icon an incomplete survey displays in iForm. Reference the slide with the record icons and make sure participants understand the difference between each one.  Have the participants delete the incomplete record from the device.  SHARE **Key Message 2:**  **Records that have not been uploaded (torn page or hourglass icon) only exist on the device. If you delete one of these records, THERE IS NO UNDELETE, since it is not in the cloud database.** |

**LUNCH BREAK**

# SESSION 4: iForm Account Maintenance

**14:00 – 15:30**

**Facilitator: X**

**Session Objectives**

By the end of the session, participants:

* Are familiar with how to view and analyze data in an iForm database, create and delete users and user groups, create form groups and assign forms to users, and maintain iForm licenses for their project’s profile.

**Key messages**

1. An iForm license is used per user, per device. Example: If you use 1 username (e.g. Drcdemo) on 2 devices, you are using 2 licenses, even though you are using 1 username.
2. Just because there are no more licenses does not mean that you need buy more. Check the “last log in” dates of the current licenses to see if some are not being used. Also, check that there are no devices logged in with two licenses. Deactivating a license used on a device is not permanent – that device will simply not be able to log in for the next 7 days with the deactivated username.

**Materials**

Equipment: LCD Projector

| **Time** | **Method** | **Facilitation notes: SESSION 4: iForm Account Maintenance** |
| --- | --- | --- |
| 14:00 – 14:30 | *Data view and analysis portion of Presentation (30 min)* | *Note: This session is usually best done by connecting the projector to the facilitator’s computer and leading the participant’s through each of the iForm sections on their own computers. The presentation can be used as a back-up in case there are technical difficulties.*  *Reminder: In order for participants to be able to view all iForm menu options, their user IDs must be enabled as administrators.*  Have each participant log onto iForm using their devices ID by accessing crs.iformbuilder.com.  Review the different components of the Data Grid (tabs, username, profile number, logout button, ect…)  Using the ICT4D pre-test form as an example (or any other form that might be available), walk the participants through the different data view and analysis options on the Data Tab. As data connections might be slow, stop frequently to make sure that everyone has been able to load the different view options. |
| 14:30 – 15:00 | *Form portion of Presentation (30 min)* | Go through the different components of the Forms tab (Form Builder will be left until the afternoon).  Have participants practice assigning forms to their user, and creating form groups.  *Note: all form groups should be created with the participant’s unique username in the title, so as not to create duplicates.* |
| 15:00 – 15:15 | *User portion of Presentation (30 min)* | Go through the different components of the User tab.  Walk participants through the user creation process, explaining all the different fields (no need to save it, if there are no licenses left).  Have participants create a user group and assign their form group to that user group.  *Note: all user groups should be created with the participant’s unique username in the title, so as not to create duplicates.* |
| 15:15 – 15:30 | *License management portion of Presentation (30 min)* | Go through the different components of the Company tab, focusing on the License option.  Spend time on the process of obtaining new/more licenses – the SharePoint page should open when that option is chosen in the Company tab – as well as how to deactivate licenses in order to some up.  SHARE **Key Message 1:**  **An iForm license is used per user, per device. Example: If you use 1 username (e.g. Drcdemo) on 2 devices, you are using 2 licenses, even though you are using 1 username.**  SHARE **Key Message 2:**  **Just because there are no more licenses does not mean that you need buy more. Check the “last log in” dates of the current licenses to see if some are not being used. Also, check that there are no devices logged in with two licenses. Deactivating a license from a device is not permanent – that device will simply not be able to log in for the next 7 days with the deactivated username.** |

Coffee break

# SESSION 5: Building simple forms in iForm

**4:00 – 5.00**

**Facilitator: X**

**Session Objectives**

By the end of the session, participants:

* Can build simple forms using iFormBuilder

**Key messages**

1. There are certain words that are reserved and cannot be used as a data column name (full list at https://iformbuilder.zendesk.com/hc/en-us/articles/201698530). The Label can say anything, but the data column name cannot appear in this list (common reserved words are “date”, “time”, “location” and “comment”). If you do use one of these words by accident, iForm will delete the widget and return an error message. Many times, iForm will continue to remember the error, even if it is corrected and give it repeatedly when the form is saved. For this reason, every time iForm returns an error, we recommend reloading the form to avoid unnecessary errors.
2. Option lists can be shared between forms, so make sure the title is helpful to others and NEVER delete or modify an existing option list, since you don’t know who might be using it. That being said, try to use existing option lists where possible to avoid duplication.
3. Creating Option Lists is a two part process. You must first SAVE the list and the ASSIGN the list to the widget where it belongs. Before you move on, VERIFY that the option list that appears in the Option List tab a) is correct and b) has an easily identified name (sometimes the # Option List title remains, which is unhelpful to everyone).

**Materials**

Equipment: LCD projector hooked up to the facilitator’s computer;

Flipchart and sticky notes

Handouts: 1.5.1 Individual Exercise

| **Time** | **Method** | **Facilitation notes: SESSION 5: Building simple forms in iForm** |
| --- | --- | --- |
| 4:00 – 4:45 | *In plenary, each participant on their computer (30 min)* | *Note: remind participants to name their forms and option lists uniquely by including their username in the titles.*  **Handout 1.5.1 Exercise #1 (Simple form building)**  Walk participants through building a simple “Workshop Registration Form”  STEP 1:   * Go to the Form Builder section of the Forms tab * Select “Create New Form” * Review the different fields that appear on the New Form’s title page * Let participants know about the website [www.iconfinder.com](http://www.iconfinder.com) where free icons can be found, as well as how to find their url addresses. * Save the new form (make sure participants notice that this is also where forms can be deleted)   STEP 2:   * Once the title page is complete (form name, table name, icon as a minimum), create your first required field “Participant’s Name”. * Review the contents of the **“Common”** section of the Element Properties * Review the contents of the **“Input Properties”** section of the Element properties. Go through the list of all the possible Input Types (participants can also hover their mouse over the Input Type to read a description).   **ASK**: “What input type should the field ‘Participant’s Name’ be?”  **ANSWER**: Participants could answer “Text” or “Pick List”, but since we are just starting off, go with Text. We will cover Pick Lists and Option lists a bit later.   * All participants should now have a form with one REQUIRED text field for the participants name (go around and check each computer to make sure everyone is keeping up. Do this continually throughout the exercise).   STEP 3:   * Now let’s create a new required field for the “Workshop Date”   **ASK**: “What input type should the field ‘Workshop Date’ be?”  **ANSWER**: Participants should answer “DATE”.  SHARE **Key Message 1:**  **There are certain words that are reserved and cannot be used as a data column name (full list at** [**https://iformbuilder.zendesk.com/hc/en-us/articles/201698530**](https://iformbuilder.zendesk.com/hc/en-us/articles/201698530)**). The Label can say anything, but the data column name cannot appear in this list (common reserved words are “date”, “time”, “location” and “comment”). If you do use one of these words by accident, iForm will delete the widget and return an error message. Many times, iForm will continue to remember the error, even if it is corrected and give it repeatedly when the form is saved. For this reason, every time iForm returns an error, we recommend reloading the form to avoid unnecessary errors.**  STEP 4:   * Now let’s create a new required field for the “Participant’s Gender”   **ASK**: “What input type should the field ‘Participant’s Gender’ be?”  **ANSWER**: Participants should answer “Select”. If they answer “Pick List” explain how Select is a better choice for questions that have few possible answers.   * Review the contents of the **Option List** section of Element Properties, and select “Option List Manager”. * Have participants create an Option List for Gender (*remind them to put their usernames in the title so each list is unique. Also, make sure that each participant uses a different option list, since they can become overwritten if everyone selects # Option List.)* * Save the new Option List, then find it under its new name and Assign it to your Participant’s Gender widget.   SHARE **Key Message 2:**  **Option lists can be shared between forms, so make sure the title is helpful to others and NEVER delete or modify an existing option list, since you don’t know who might be using it. That being said, try to use existing option lists, where possible to avoid duplication**  SHARE **Key Message 3:**  **Creating Option Lists is a two part process. You must first SAVE the list and the ASSIGN the list to the widget where it belongs. Before you move on, VERIFY that the option list that appears in the Option List tab a) is correct and b) has an easily identified name (sometimes the # Option List title remains, which is unhelpful to everyone).**  STEP 5:   * Let’s rearrange the order of the questions in the survey.   **ASK**: “What do you do if you want to have the workshop date be the first question asked in the survey?”  **ANSWER**: Participants should practice dragging the workshop date up to the top of the survey to rearrange the order of the questions.  STEP 6:   * Now let’s create a new required field for the “Participant’s Sector”. Options can include Shelter, WASH, Agriculture/Livelihoods, Protection, Operations, and OTHER   **ASK**: “What input type should the field ‘Participant’s Sector’ be?”  **ANSWER**: Participants should answer “Pick List”. If they answer “Select” explain how Pick List is a better choice for questions that have many possible answers.   * Let participants know that Pick Lists work similar to Selects in that you need to assign an Option List to the widget. Making sure that no one is using the same option list, see if they can remember the steps to creating the option list.   STEP 7:   * Let’s stop for a moment and check our progress on the devices. See if the participants remember how to sync. If any errors appear while syncing that were covered in the Session 5 – Troubleshooting, try to jog their memory as to the solution. * After syncing, participants should be able to do a first test on their draft form. Have them correct any errors they find and then re-sync.   STEP 8:  **ASK**: “What do we do if we need to capture the Sector in the case that the response is “Other”?  **ANSWER**: Participants should come up with some version of Skip Logic.   * Participants should create a required text field “If other Sector, please specify”. * Review the **Smart Control** tab of the Element Properties. Instruct participants to create the condition that the field should only appear when the answer to the previous question is “Other” (data\_column\_name\_previous == (option list value of Other for previous)) * Have the participants sync their devices and test their logic. Support where necessary.   STEP 9:   * Have participants add a field for a required Photo of the Participant   **ASK**: “What do we do if we need to take a photo of the participant?  **ANSWER**: Participants should come up with Image.  STEP 10:   * Have participants add a field for a non-required GPS coordinate for the workshop   **ASK**: “What do we do if we need to capture the GPS coordinates of the workshop?  **ANSWER**: Participants should come up with Location.  STEP 11:   * Save, sync and test! |
| 4:45 – 5:00 | *Exercise (10 min)* | If there is time, have everyone collect workshop data from 3 different people and sync the data into the iForm database. If there is no time, skip this part.  If the GPS does not work, make sure that participants have the Cellular Services on their iPads activated and also make sure that in Settings -> Privacy -> Location Services that Location Services is set to on and that the iForm client is activated within Location Services. |
| 5:00 – 5:15 | *Flip Chart and sticky notes* | Before people leave, draw a line down the middle of a flipchart paper with a happy face on one side and a sad face on the other. Hand out sticky notes and have people write what they liked and disliked about the day on the notes. Have them post the notes on the appropriate side of the flip chart as they leave. |