



Expanding Opportunities Worldwide

SOFTWARE USER'S MANUAL

ACDI/VOCA Mobile phone based Beneficiary Registration & Update System

Software Developed by:



THE
HUMANITARIAN
FOSS PROJECT

Building Free Open Source Software for Society

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About this Document: This document provides user documentation for the smart phone application for beneficiary tracking, developed by the Humanitarian FOSS Project in collaboration with ACDI VOCA. The documentation is in sections based on basic equipment maintenance and user roles.

Revision Sheet

Release No.	Date	Revision Description
Rev. 0	6/20/11	Initial Draft of User Manual
Rev. 1	6/22/11	Draft version in English
Rev. 2	6/23/11	Draft version with updated Screenshots

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2 GENERAL OVERVIEW

Welcome to the ACDI/VOCA Mobile phone based Beneficiary Registration & Update Application, mobile based data collection application. You can use this application to:

- Mobile registration of health and agricultural beneficiaries.
- Mobile updates for the following events during a distribution event:
 - Distribution update—to record a beneficiary’s attendance or absence at a distribution event.
 - Suppression update—when a beneficiary’s benefits are delayed due a variety of possible events (e.g., death, fraud, ineligibility).
 - Modification update—when a error is corrected in a beneficiary’s record.
 - Transfer update—when a beneficiary is transferred to another program phase (mal nourished child, in prevention child, expecting mother, nursing mother).

An important advantage of using the Mobile Application is the ability to receive and send data directly to the central TBS Server when out in the field. This ability to synchronize information enables everyone to have a common, dynamic view of the latest information. Field work is accomplished in the application through the use tasks that guide you through the various processes. The following user guide is organized by designated user roles.

2.1 BACKGROUND INFORMATION:

For 43 years and in 145 countries, ACDI/VOCA has empowered people in developing and transitional nations to succeed in the global economy. Based in Washington, D.C., ACDI/VOCA is a nonprofit international development organization that delivers technical and management assistance in agribusiness systems, financial services, enterprise development and community development in order to promote broad-based economic growth. ACDI/VOCA currently has approximately 90 projects in 40 countries and revenues of approximately \$124 million.

The ACDI/VOCA Multi Year Assistance Program (MYAP) started in February 2008 and has three components: the first component aims at increasing and diversifying both agricultural and non-agricultural livelihood opportunities for the rural poor in the Southeast. This component aims to increase production yields and quality of staple and cash crops, as well as improve access to markets, through encouraging and strengthening community associations and group savings plans. The second component focuses on long-term nutrition and health needs of vulnerable populations. This component concentrates on increasing nutritional levels for households through direct distribution of rations complemented by health, nutrition, hygiene training, health services and providing opportunities to improve sanitation infrastructure. The third component increases the ability of communities to prepare for and respond to shocks, such as natural disasters, through the development of an Early Warning System.

ACDI/VOCA has partnered with Bureau de Nutrition et Développement (BND) for the implementation of the second component of its program. BND takes care of the logistics of the direct distribution (including internal

transportation, shipping and handling) as well as the latrine building. Southeast Haiti is a remote, hard to reach place and ACDI/VOCA field staff faces immense challenges when setting up and implementing aid distribution programs. When aid is delivered paper forms and fingerprint identification are used to keep track. This takes time, leads to long lines and makes it difficult to ensure that people get what they need. The challenge has been how to replicate this process using technology in locations where there is no electricity and no Internet.

ACDI/VOCA worked with the Humanitarian Free Open Source Software (FOSS) project (<http://hfoss.org/>) which is a collaborative, community-building project that was started by a group of computing faculty and open source proponents at Trinity College, Hartford, Connecticut. The HFOSS Project is an NSF funded project aimed at getting Computer Science undergraduates engaged in building free and open source software (FOSS) that benefits the public good. The HFOSS project has developed numerous smart phone applications for other humanitarian organizations with the help of students. The Humanitarian Free and Open Source Software (HFOSS) will create a new Smart phone application on the Google Android operating system that will allow Haiti field teams to easily and quickly register new beneficiaries and update beneficiary records during or following distribution events.

As a result, ACDI/VOCA in collaboration with the Humanitarian FOSS Project developed a more sophisticated and reliable beneficiary registration and updating system that could be used in the field in Haiti.

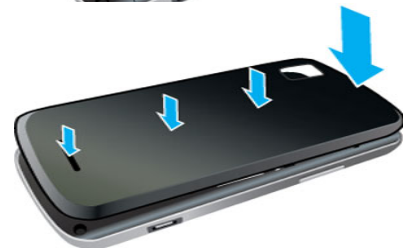
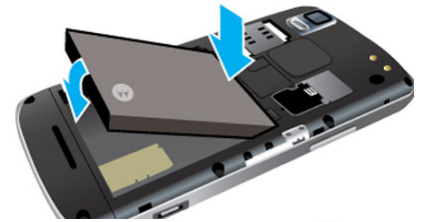
3 GET TO KNOW YOUR PHONE

3.1 SET UP YOUR PHONE

When you unpackage the box, you will find several components such as phone, battery, phone's back cover, USB cable and power plug. Here are steps to set up the phone:

1. Install the battery
 - Insert the battery into the opening at the back of the phone, making sure that the connectors line up.
 - Put the battery cover over the battery compartment and press gently until hear a click.
2. Charge the battery for at least three hours to make sure it is fully charged before using
3. Press and hold the Power/Screen Lock button on top of your phone to turn it on.

As the phone is turned on, it will display some setup instructions. Be sure to add email and other accounts when prompted. Or, touch Skip to go to the home screen and start use the phone. You can go back and add accounts later.



3.2 PHONE BASICS



- **Power/Screen Lock Button:** turn the phone on / off or put the phone to sleep
- **Message Light:** flashing when there is incoming new messages or check phone's charging status
- **Volume Buttons:** adjust the ringer volume or adjust the voice volume during a call
- **Home Key:** press to return to the home screen. Press and hold the home key to see your most recently used apps
- **Menu Key:** open additional options for whatever screen user is seeing
- **Micro USB Connector:** connect the phone charger or an optional USB cable.
- **Microphone:** allow other callers to hear you clearly when you are speaking to them.
- **Search Key:** open a Google search screen so you can search the web
- **Back Key:** return to the previous screen
- **Touchscreen:** display all the information necessary to operate the phone, such as Contacts list, the date and time, and the battery strength.
- **Programmable Button:** open your favourite feature with just one press
- **3.5mm Headset Jack:** plug in either a stereo headset or an optional headset for hands-free conversation.

3.3 TURNING YOUR PHONE ON AND OFF

Turn On: Press and hold Power/Screen Lock button on the top of the phone.

Once the phone is on, it may display “Starting Services.” When the phone finds a signal, it prompts you to unlock the screen by dragging the slide to the right. Now you are ready to operate the phone. If your phone is unable to find a service after 15 minutes of searching, a Power Saver feature is automatically activated. This feature conserves your battery power when you are in an area where there is no signal.

Turn Off: Press and hold Power/Screen Lock button to open the phone option menu. Press Power Off to turn the phone off.

3.4 THE MENU, HOME, AND BACK BUTTONS

Directly under the screen of the phone, there is one row of 4 physical buttons: Menu, Home, Back, and Search.



For the purposes of the application and basic phone functions, only the Menu, Home, and Back buttons will be predominately used.

1) The Menu Button

The first button of the row is the Menu button. Pressing the Menu button will often open up a new set of buttons applicable to whatever is being done at the moment. For example, pressing the Menu button while on the home screen of the phone will open two rows of new buttons: Add, Profiles, Search, Wallpaper, Notifications, and Settings. For the POSIT applications, pressing Menu will be mainly used to getting to the Settings buttons (or in case of the Administrator, the Settings buttons and the Admin button).

To remove the new set of buttons that pressing Menu brings up, merely press Menu again and the buttons will disappear.

2) The Home Button

The second button is the Home Button. Pressing the Home button brings you directly to the home screen of the phone. If the Home button is pressed while engaged in the POSIT application (or most other applications), then the application will remain running in the background. Therefore if you press the application button again, you will return to whatever place you were in the application before pressing the Home button.

3) The Back Button

The third button is the Back button. Pressing the Back button takes you back a page in an application. The Back button is the only way to successfully logout and close the POSIT application. When on the home screen of POSIT, pressing back will cause a dialog box to open and ask you whether or not you want to leave the application entirely. If you press OK, you will logout.

NOTE: Pressing the Back button or the Home button while in the middle of entering information for beneficiaries or updating may cause the information that was already entered to disappear.

3.5 THE ALT, DELETE, AND UPPERCASE KEYS

There are 3 keys on the physical keyboard that will be used frequently for the POSIT applications: The ALT, Delete, and Uppercase keys.



1) The ALT key

If you look at your phone, you will notice that almost all keys on the keyboard have two characters on it. The character on the bottom of the key is colored white while the character on top is a very light gray. Pressing any key on the keyboard will automatically enter the character on the bottom. To access the top characters, you will need to press the ALT key located on the bottom row of the keyboard.

Pressing the ALT key once will allow you to access only ONE of the top characters. Upon pressing the top character you want, the entering of characters will automatically default back to the bottom characters. Therefore, if you wanted to type the phrase 'box1red2', you would type the following: b, o, x, ALT, 1 (once you press the key for 1, the keyboard will go back to entering the bottom characters until you press ALT again), r, e, d, ALT, 2.

To lock the keyboard so that you can type a stream of top characters without pressing the ALT in between, press the ALT key twice. This will lock the keyboard to enter only the top characters until you are ready to access the bottom characters. To go back to entering the bottom characters, press the ALT key once and you will be able to

type bottom characters again. Therefore, to enter the phrase 'red12345box', you would press the following keys: r, e, d, ALT, ALT, 1, 2, 3, 4, 5, ALT, b, o, x.

To keep track of which kind of character is being typed, you will notice that the cursor will change in correspondence to what is being done. When typing the bottom characters, the cursor will be a simple vertical line. When the ALT key is pressed once, the cursor will get a triangle on top of the line. When the ALT key is pressed twice, the cursor will change into a Y-shape.

2) The Uppercase Key

Using the Uppercase key is similar to using the ALT key. To write one capital letter, press the Uppercase key (the leftmost key in the third row shaped like an arrow pointing up with a bar over it) once. (pic of uppercase key). To enter a stream of capital letters, press the Uppercase key twice.

3) The Delete Key

If you make a mistake entering something, merely place the cursor behind whatever you want to be changed and press the Delete key (the rightmost key at the end of the second row shaped like a flag pointing left with a little X on it). Pressing the Delete key will erase one character. Pressing the Delete key and holding it down will erase a stream of characters quickly for however long you hold the key down.

3.6 BATTERY AND CHARGER

Your phone is provided with a Lithium Ion (Li-Ion) battery. It allows you to recharge your battery before it is fully drained. When there is about 15% ~ 20 % battery power left, your phone warns you with an audible alert.

Tip: Long backlight settings, searching for service, vibrate mode, browser use, and other variables may reduce the battery's standby times.

Notice, When removing the battery, make sure that the power is off so that you do not lose any stored numbers or messages.

Warning: Do not handle a damaged or leaked Lithium Ion battery because you can be burned.

4 USER ROLE: NORMAL USER

4.1 LOGGING IN

1. Log into the application using the username and password that the administrator has given you (See Figure 1).
2. After logging in, press the Menu button on the phone. A menu will appear showing the available options: Settings and About. Press the Settings option (See Figure 2).

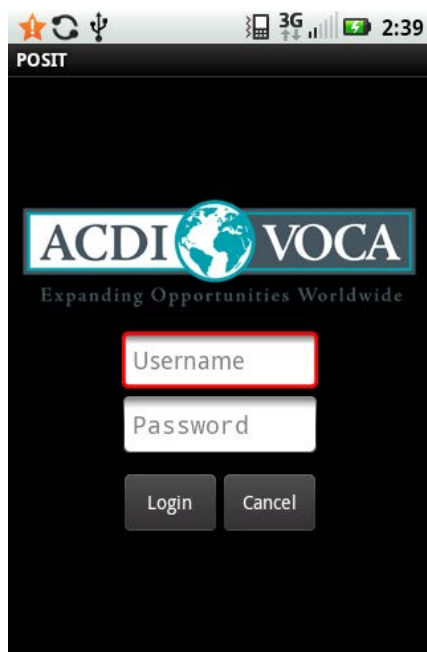


Figure 1: Login screen.

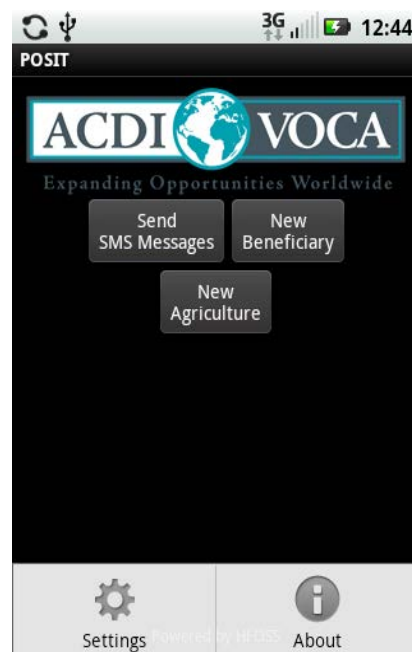


Figure 2: The main screen menu.

4.2 CHANGING LOCALE

1. After pressing the settings option, you will be taken to a different screen that contains two other options: About and ACDI/VOCA Preferences (See Figure 3). Press the Preferences options. Under Preferences, press the Locale option on the phone's screen (See Figure 4).
2. After pressing the Locale option, you will be given the option to change the locale to either English or Haitian Creole.

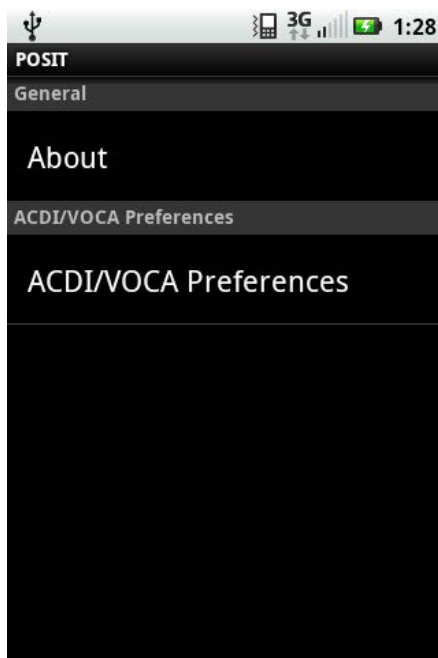


Figure 3: Available options under settings.

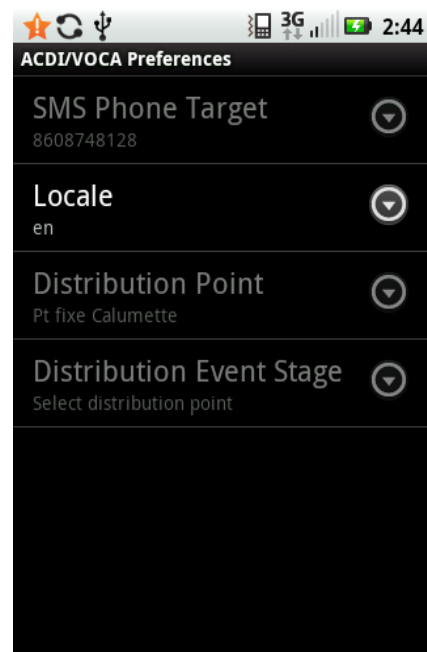


Figure 4: Available options under ACDI/VOCA preferences.

4.3 REGISTERING NEW BENEFICIARY

1. Under the main menu screen, press the New Beneficiary button.
2. After pressing the New Beneficiary button, you will be guided to a new screen, where you will be asked to input basic information such as name, address, date of birth, sex, beneficiary category, etc. (See Figure 5) *Note: There will also be questions that may lead to other follow-up questions (See Figure 6).*
3. When you are done filling out the New Beneficiary form, click the Save to Db form to save the registration information (See bottom of Figure 6).

The screenshot shows the POSIT mobile application interface. At the top, there is a status bar with icons for a star, a refresh button, a USB symbol, 3G signal strength, and a battery icon, along with the time 2:41. Below the status bar, the application title 'POSIT' is displayed. The main content area is titled 'General Information' and is divided into sections: 'Name and Address' with input fields for 'First Name', 'Last Name', and 'Locality'; 'Date of Birth' with a date picker showing 'Jun 22 2011'; 'Sex' with radio buttons for 'Female' and 'Male'; and 'Number of people in home'.

Figure 5: New beneficiary form.

The screenshot shows the POSIT mobile application interface. At the top, there is a status bar with icons for a star, a refresh button, a USB symbol, 3G signal strength, and a battery icon, along with the time 2:41. Below the status bar, the application title 'POSIT' is displayed. The main content area is titled 'Questions' and contains three questions, each with 'Yes' and 'No' radio button options: 'Are you a mother leader?', 'Have you received a visit from a mother leader?', and 'Are you receiving aid from ACDI/VOCA Agriculture Program?'. At the bottom of the screen, there is a red text label 'Save the registration' and a 'Save to Db' button.

Figure 6: Save new beneficiary registration information.

4.4 NEW AGRICULTURE BENEFICIARY

1. Under the main menu screen, press the New Agriculture Beneficiary button.
2. After pressing the New Agriculture button, you will be guided to a new screen, where you will be asked to input some information similar to that of the New Beneficiary category. Other information include amount of land, seed types, tools, etc. (See Figures 7 and 8) *Another way to get to the New Agriculture screen is by answer Yes to the last question on the New Beneficiary form.*
3. When you are done filling out the New Agriculture form, click the Save to Db form to save the information.

POSIT

General Information

Name and Address

First Name

Last Name

Locality

Date of Birth

Jun 22 2011

Communal section

Anse a Pitres

Figure 7: New Agriculture form.

POSIT

Beneficiary Category

Farmer MUSO Cattle Rancher

Store Owner Fisherman

Artisan Other

Number of people in home

Amount of Land (Carreau)

Seed Types

Vegetables Cereal

Figure 8: Additional view of the New Agriculture form.

4.5 SEND SMS MESSAGES

1. Under the main menu screen, press the Send SMS Messages button.
2. After pressing the Send SMS Messages button, you will be directed to a new screen where there will be a list of pending messages. To transmit the new registration information from the phone to the server in the head office, press the menu button and click the Send SMS Messages button.
3. If there are no pending messages, then a message will display on the screen reading, “No beneficiaries.”

4.6 LOGOUT

1. Under the main menu screen, in order to logout, press the back button on your phone (See Figure 9). You will be asked once whether or not you want to exit the program.

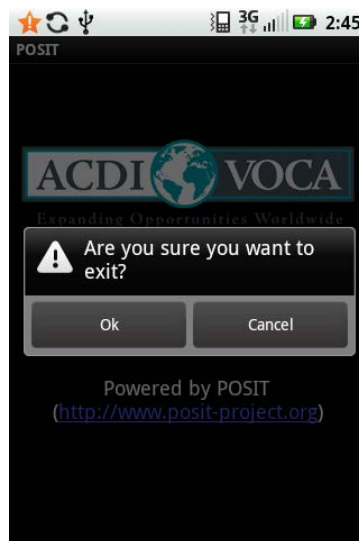


Figure 9: Exit screen.

5 USER ROLE: ADMINISTRATOR

5.1 IMPORTING THE DATA SET

****NOTE:** Before managing a distribution event, make sure that you have added the file of beneficiaries has been added to your phone. This can be done by plugging in your phone to your computer by USB cord. When plugged in, slide down the screen to view the different USB connections. Sliding down the screen can be done by placing a finger at the top of the screen and sliding your finger down the screen of the phone (Figure 10). You will see that one of the options on the new screen, under the Tab called 'Ongoing', is 'USB Connection.' Press 'USB Connection' and a menu will appear. Press 'USB Mass Storage' and then the 'OK' button.

When this is done, go to your computer you plugged the phone into and wait for the removable drive to mount in the "My Computer" and there should be a USB icon or removable drive listed. This icon represents your phone. Double click the icon and a window will opening showing the current folders in the phone. Click the 'acdivoca' folder. (If there is no 'acdivoca' folder, create one. Spell exactly as shown). When the 'acdivoca' folder opens, cut and paste (copy) the Beneficiare.csv file into it. The Beneficiare.csv will have been provided to you by the MIS manager. When you're finished, close the window and right click the USB icon and safely eject the phone.

Turn off the 'USB Connection' on the phone and return it to 'Charge Only' mode. This can be done by sliding the screen down again, pressing 'Charge Only' option, and pressing 'OK.'

****NOTE:** See Figure 11. The icon being pointed to is the Menu button referenced to in this guide. The button two to the right (the curved arrow) is the Back button, which will also be referenced.

You are now ready to begin.

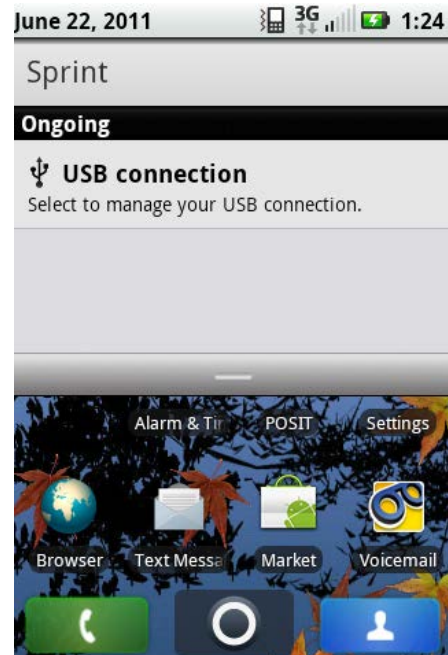


Figure 10: Sliding down the screen.

5.2 LOGGING IN

Login into the application using your **administrator** username and password (this will be provided to you by the MIS Manager).

After logging in, press the Menu button on the phone. A menu will appear showing the options: Settings, Admin, and About (Figure 12). Press the Admin option. You will be taken to the Administrator Function Menu (Figure 13).

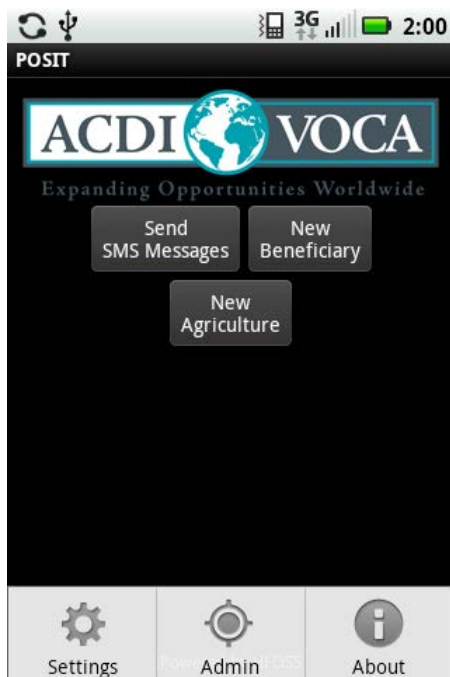


Figure 12: The main screen menu.

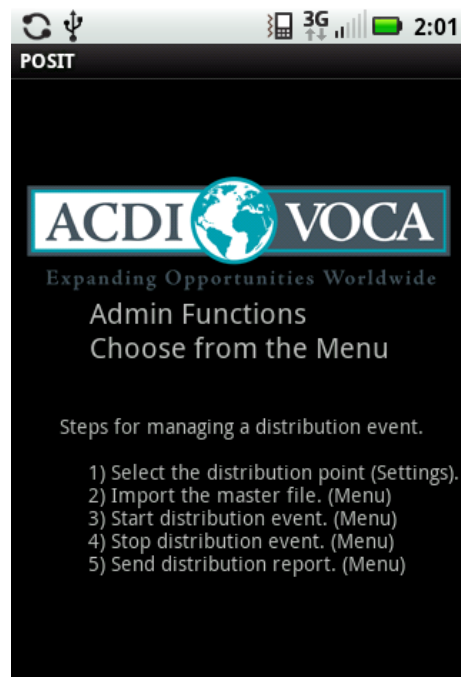


Figure 13: The Administrator Functions Screen.

5.3 MANAGING A DISTRIBUTION EVENT

There are 5 main steps for managing a distribution event.

1. Select a distribution point.
2. Import the master beneficiary file.
3. Start distribution event.
4. Stop distribution event.

NOTE: Remember if a distribution event lasts longer than 1 day, then you cannot press 'Stop Distribution' until the event is actually over.

5. Send distribution report.

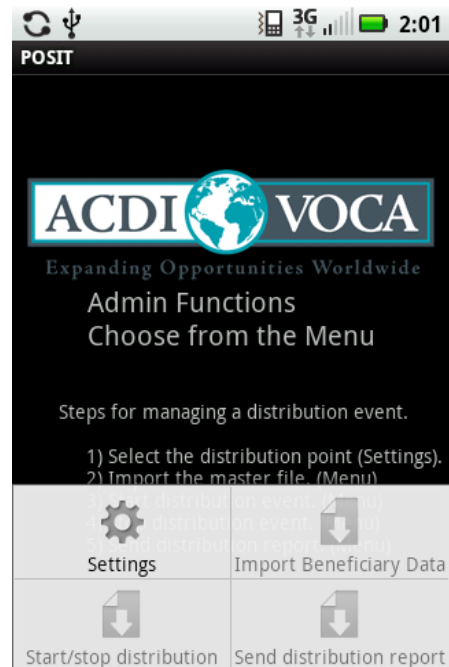


Figure 14: The admin functions menu.

5.3.1 STEP 1: SELECT A DISTRIBUTION POINT

Selecting a distribution point can be done by pressing the Menu button > Settings > ACIDI/VOCA Preferences.

In ACIDI/VOCA Preferences (Figure 15), press 'Distribution Event Stage'; upon pressing it, a drop down will appear (Figure 16).

Press the first option, 'Select distribution point'. When this option is pressed, the drop down menu will disappear and you will return to the ACIDI/VOCA Preferences.

Press the Distribution Point option and another drop down menu showing the different distribution points will appear.

Select a distribution point and when the drop down menu disappears, you will notice that the text under the Distribution Event Stage will have changed to the next stage, 'Import beneficiary file' (Figure 17).

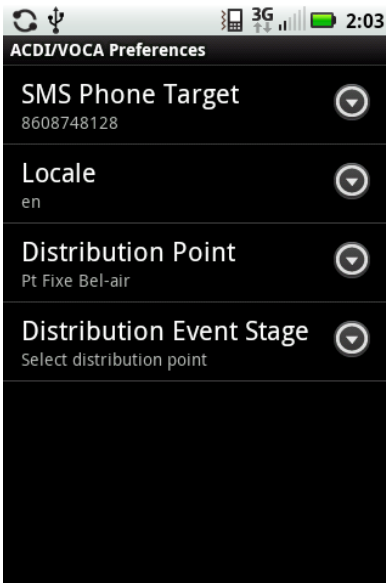


Figure 15: ACDI/VOCA Preferences.

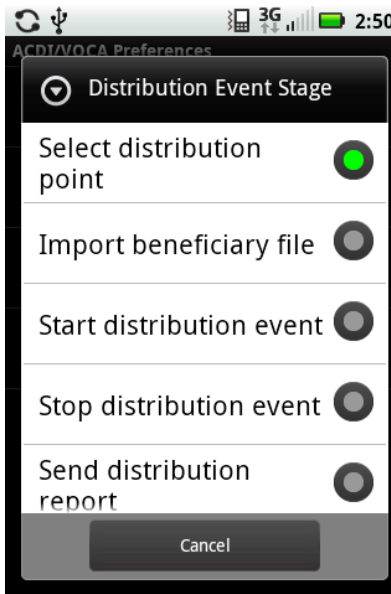


Figure 16: Distribution Event Stage drop down menu.

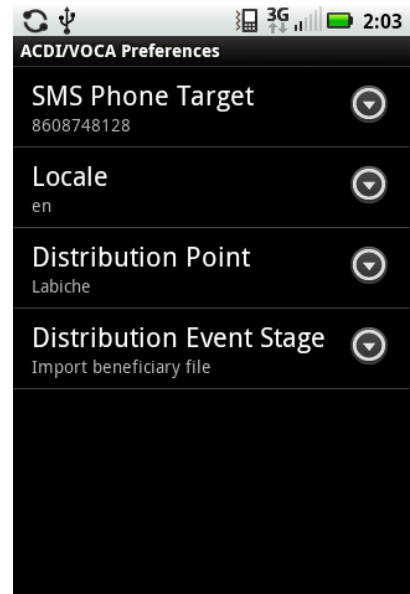


Figure 17: Import beneficiary file now selected

5.3.2 STEP 2: IMPORT THE MASTER BENEFICIARY FILE

When you have chosen your distribution point, navigate back to the Administrator Functions Menu. This can be done by pressing the Back button twice.

Press the Menu button and upon pressing, notice that the 'Import Beneficiary Data' option is now press-able (Figure 18). Press it and you will be taken to an administrator login screen (Figure 19). Provide your username and password. When you have logged in, the data will begin loading itself into your phone. A pop-up screen will appear, temporarily disabling use of the application while the data loads (Figure 20).

When the data has finished loading, the pop-up screen will disappear. Press the Menu button again and you will notice that the Start/Stop Distribution button is now enabled.

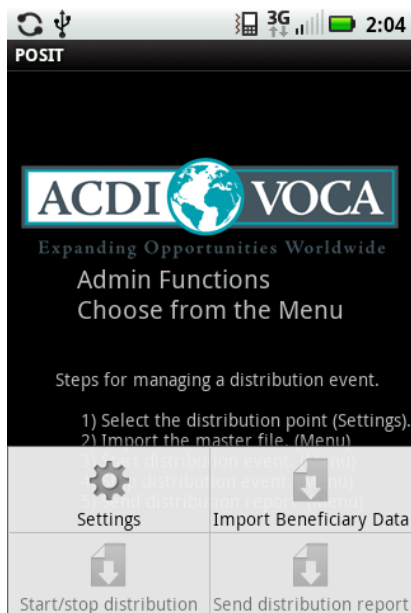


Figure 18: The enabled 'Import beneficiary data' option.

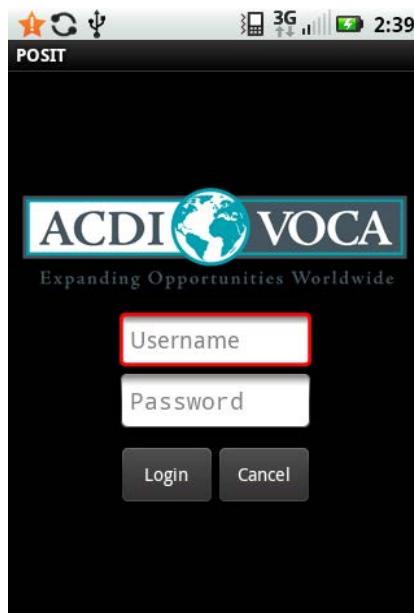


Figure 19: Administrator login screen

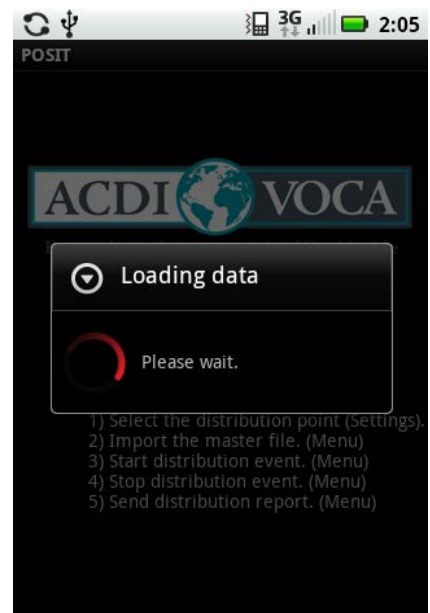


Figure 20: The load screen.

5.3.3 STEP 3: START A DISTRIBUTION

Press the **Menu button > Start/Stop Distribution**. A menu showing the two options: Start Distribution and Stop Distribution will appear (Figure 21). If you are just starting a distribution, then the 'Stop Distribution' option should be disabled.

Press 'Start Distribution'. After this, you can now begin adding new health beneficiaries, new agriculture beneficiaries, etc.

5.3.4 STEP 4: COMPLETE A DISTRIBUTION

When you are finished a distribution event, navigate back to the Administrator Functions Menu. Press Menu > **Start/Stop Distribution > Stop Distribution**.

5.3.5 STEP 5: SEND A DISTRIBUTION REPORT

To send a distribution report, press the **Menu button > Send distribution report** (Figure 22).

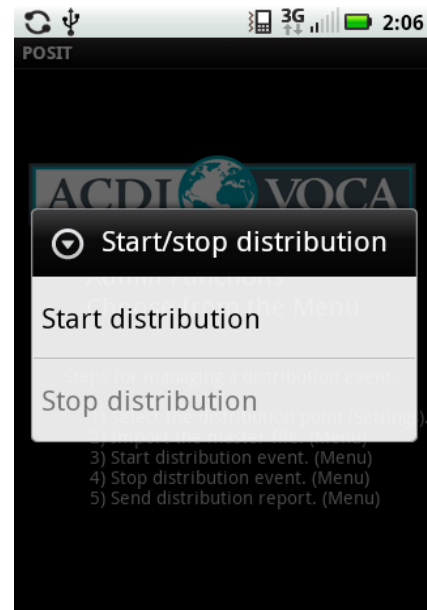


Figure 21: The 'Start/Stop distribution' option.

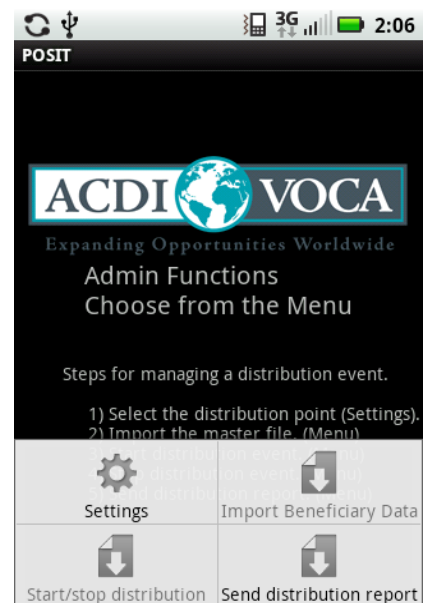
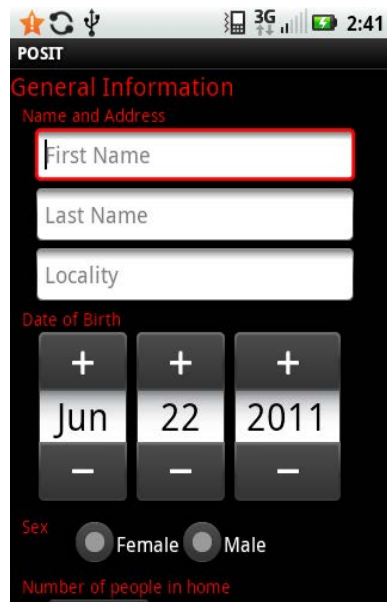


Figure 22: The 'Send distribution report' option.

5.4 MAKING A NEW BENEFICIARY

1. To make a new beneficiary form, press the 'New Beneficiary' button on the main menu (Figure 23).
2. The new beneficiary form will open on the screen (Figure 24). Fill out the necessary fields. When you are finished, press the 'Save to DB' button (Figure 25).



POSIT

General Information

Name and Address

First Name

Last Name

Locality

Date of Birth

Jun 22 2011

Sex

Female Male

Number of people in home

Figure 24: The New Beneficiary form

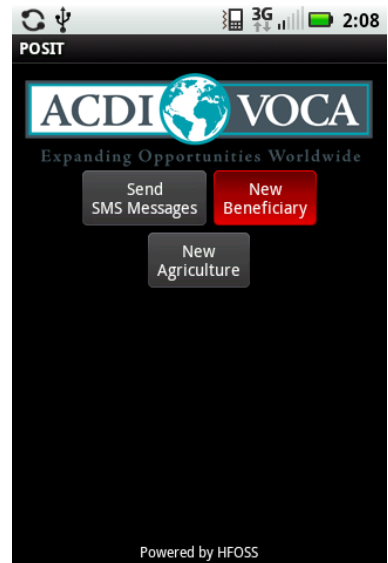
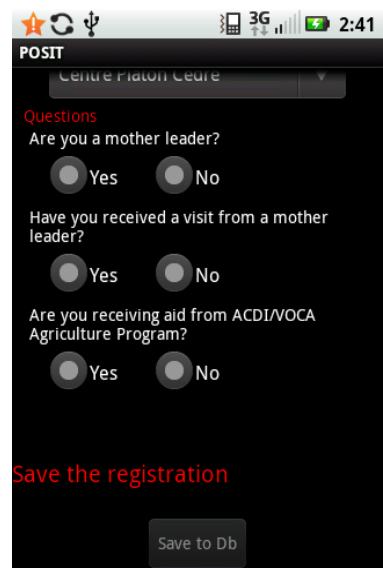


Figure 23: The 'New Beneficiary' option.



POSIT

Centre Platon Centre

Questions

Are you a mother leader?

Yes No

Have you received a visit from a mother leader?

Yes No

Are you receiving aid from ACIDI/VOCA Agriculture Program?

Yes No

Save the registration

Save to Db

Figure 25: The 'Save to DB' button.

5.5 MAKING A NEW AGRICULTURE BENEFICIARY

1. To make a new agriculture beneficiary form, press the 'New Agriculture Beneficiary' button on the main menu.
2. The new beneficiary form will open on the screen.
3. Fill out the necessary fields.
4. When you are finished, press the 'Save to DB' button.

5.6 UPDATING A BENEFICIARY

1. To update a beneficiary, press the 'Update Beneficiary' button on the main menu (only available during a distribution) (Figure 26).
2. The screen will open up, presenting a search field to lookup beneficiaries (Figure 27). Type in the ID number of the beneficiary to want to update. (**NOTE: Make sure the distribution point is correct before searching for beneficiaries) As you type in the ID number, the drop down menu above the search field will narrow down beneficiaries ID numbers as you keep typing. When you are finished typing, press the drop down menu and select the ID you need. Then press 'Lookup beneficiary'.
3. The update screen will appear with the information of the beneficiary displayed (Figure 28). Answer the update questions and when finished, press the 'Record the Update' button and you be returned to the main menu. You may also edit the beneficiary information by pressing the 'Edit' button.

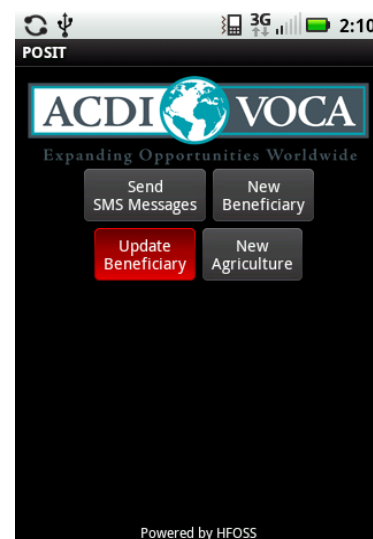


Figure 26: The 'Update Beneficiary' option



Figure 27: The search for beneficiaries.

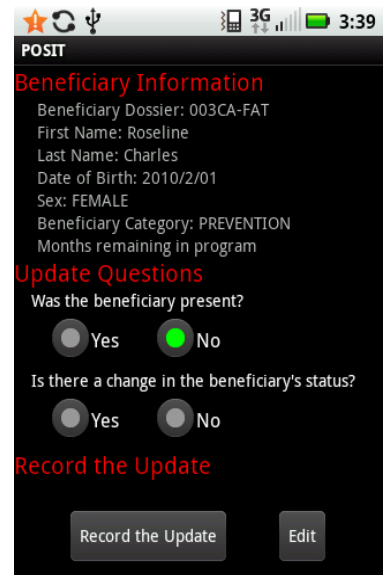


Figure 28: Recording or editing beneficiaries

5.7 LOGGING OUT OF THE APPLICATION

To logout of the application, merely navigate back to the main menu and press the Back button. Pressing the Back button will open a dialog window asking if you are sure you want to exit. Press the 'OK' button and you will be logged out.

6 OTHER PHONE HOW-TO'S

6.1 HOW TO MAKE ACCENTED LETTERS

In order to make a letter accented, you have press and hold down the key with the accented letter you want. When you do this, a menu will appear on the screen with a list of possible accented letters that correspond with the key you pressed. You make the choice of which accented character you want by directly pressing the button of the accented letter on the screen. Once pressed, the accented letter will appear wherever your cursor was.

To make a capitalized accented letter, merely press the Uppercase key (once if you only want one capitalized accented letter or twice if you want a stream of capitalized accented letters) and follow the same procedure for getting a lowercase accented letter.

Here's a list of which keys give accented letters:

e	è, é, ê, ë, e, ê, ë
r	ř
t	ť
y	ý, ý
u	ù, ú, û, ü, ů, ū
i	ì, í, î, ï, ī, ḯ
o	ø, œ, ö, ò, ó, ô, õ, õ
a	à, á, â, ä, æ, ã, å, ä, ā
s	š, ß, ś, š, ş
d	d'
g	ğ
l	ł
z	ź, ź, ź
c	ç, ć, č
n	ñ, ñ, ñ

6.2 HOW TO DEAL WITH GSM ISSUES

To utilize the phone and the POSIT application properly, the first thing that needs to be checked is whether or not the phone is in the correct network mode. The phone must use the GSM network mode. To configure this on the phone, go to Settings. Under Settings, go to Wireless Networks > Mobile networks > Network Mode. Upon pressing Network Mode, a drop down menu will appear and make sure that the option is on 'Any GSM / UMTS.'