

# First Steps

User Guide - Version 5.5

**Kinaki** is a unique and intuitive data analysis tool designed to ease and enhance reporting, monitoring and evaluation through effective use of data collected in development, humanitarian and social projects.

[www.kinaki.org](http://www.kinaki.org)

## Content

<b>Content</b> .....	2
General Info about the Kinaki Tool .....	4
Step 1 – Login into the Kinaki Platform.....	6
Step 2 – Project Selection .....	8
Step 3 – Predefined Filters.....	9
Step 4 – Displaying Column Filters.....	9
Step 5 – Selecting Column Filters.....	10
Step 6 – Possibility to hide / display all of the Original Data .....	11
Step 7 – Selected Questions .....	12
Step 8 – Data Filtering – Data Type.....	12
Step 9 – Data Filtering – Hard Filter .....	13
Step 10 - Respondents Comparison - Soft Filter.....	15
Step 11 – Results Table and Chart .....	16
Step 12 – Saving Filters .....	17
Step 13 – Report Center.....	18

Dear Kinaki User:

We developed Kinaki to help make data collection and analysis easy and efficient. By using Kinaki to store, analyze, and report on data, we hope that you will be able to engage with the data and discover meaningful and helpful results that will improve your understanding of your project(s). In particular, we hope you will use the knowledge you glean from the data analyzed in Kinaki to find ways achieve your desired outcomes and meet the needs of your project participants.

We are a team of humanitarian, development, social work, and information technology specialists who created Kinaki to address our need for improved tools when tracking and reporting on project data. In each of our industries, an enormous amount of data is collected - however, it is not always used to its greatest potential. This is a disservice to our work and, most importantly, to the people from whom the data is collected.

We hope that you will find Kinaki a useful way to collect, store, analyze and view data; but, most of all, that it will prove to be a spring-board for more effective data usage and a way to honor those who will be most impacted by its use.

Thank you, The Kinaki Team

**Kinaki Team – Europe and North America**

E-mail: [info@kinaki.org](mailto:info@kinaki.org)

Phone: Europe +420 774 018 851, Canada: 1-613-518-1729

Address Europe: Salanga s.r.o., Tylova 23, Pilsen, 301 00 The Czech Republic

Address Canada: Salanga Inc., 71 Bank Street, 6th floor Ottawa, ON K1P 5N2 Canada

## General Info about the Kinaki Tool

### Uses of Kinaki

- Assessing ongoing and emerging needs during project design and implementation
- Monitoring change and shaping project activities to reflect participants' needs
- Timely reporting of project results
- Tracking the individuals and groups who participate in projects, in a cost-effective manner
- Evaluating projects and comparing multiple data sets

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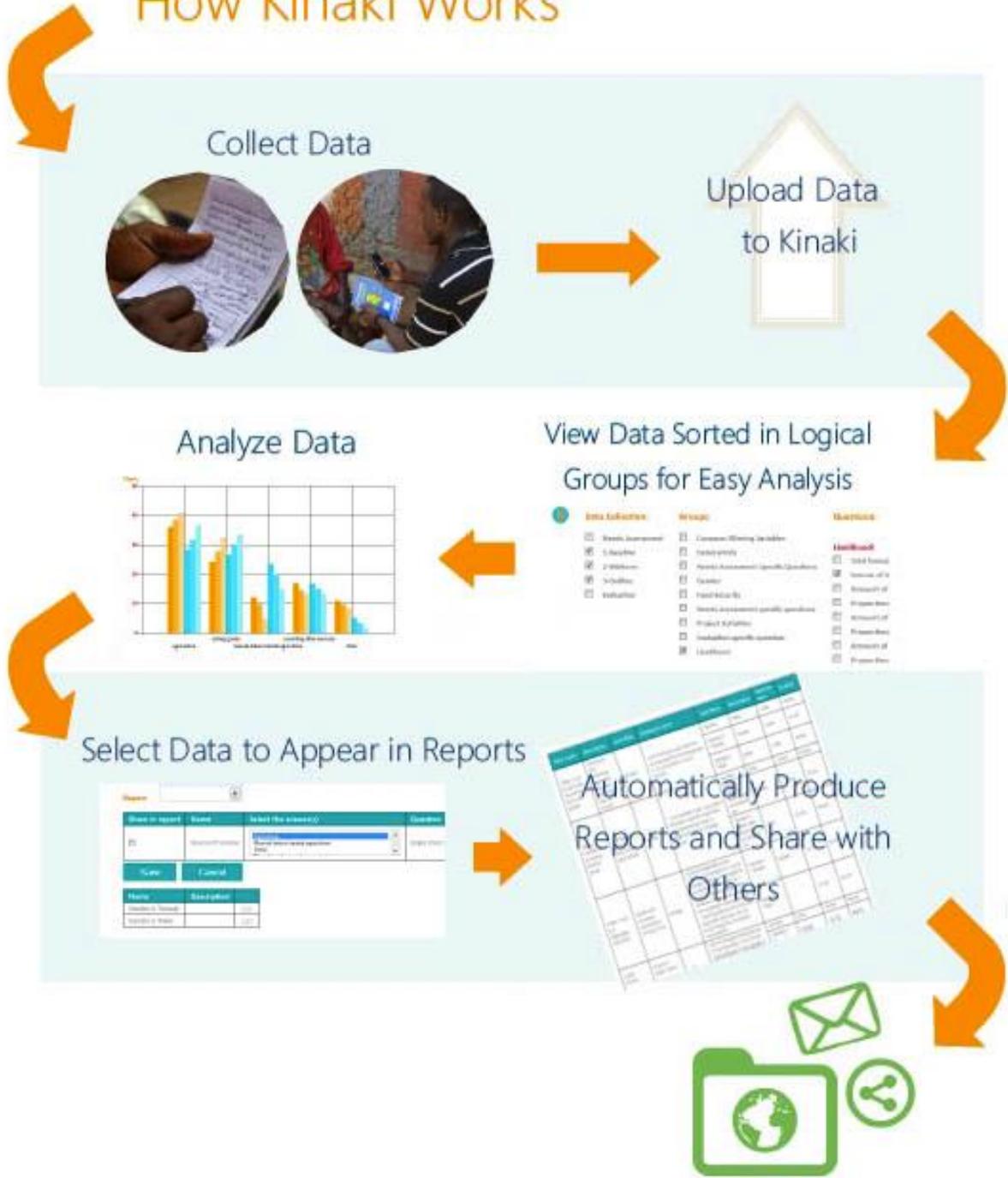
### Features

- Enables a seamless transition from data collection to data analysis:
  - Compatible with data collected through cell phones, tablets, or paper questionnaires
  - Automated data uploads of electronically collected data, directly from the field
  - No data entry required with electronic data collection tools - maximizing efficiency and accuracy
- User accounts with various features:
  - Online platform can be accessible to project staff and partners around the world
  - Different levels of access available for different user needs
- Simple user interface allows data analysis without knowledge of complicated statistical software
- Automated results:
  - Customized reports automatically generate results needed for reporting
  - Integrated automated graphs and tables that can be exported into Excel
- Regular data back-up and secure access to platform
- Effective and active system of client support and problem solving
- Training for HQ and field teams available

## General info

about the  
Kinaki tool

## How Kinaki Works



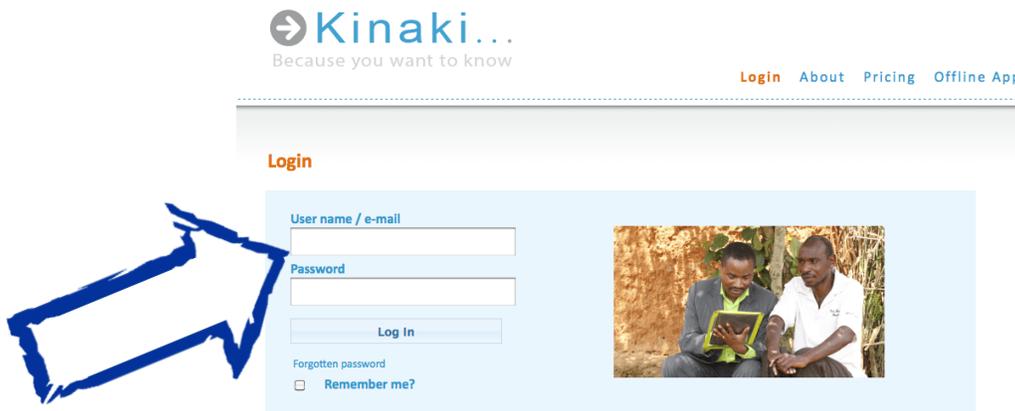
## Step 1 – Login into the Kinaki Platform



## Step 1

Log in  
to Kinaki  
using your  
credentials

Go to [www.kinaki.org](http://www.kinaki.org). When you select 'Login' from the top menu, you will be taken to a page where you can enter your account information.

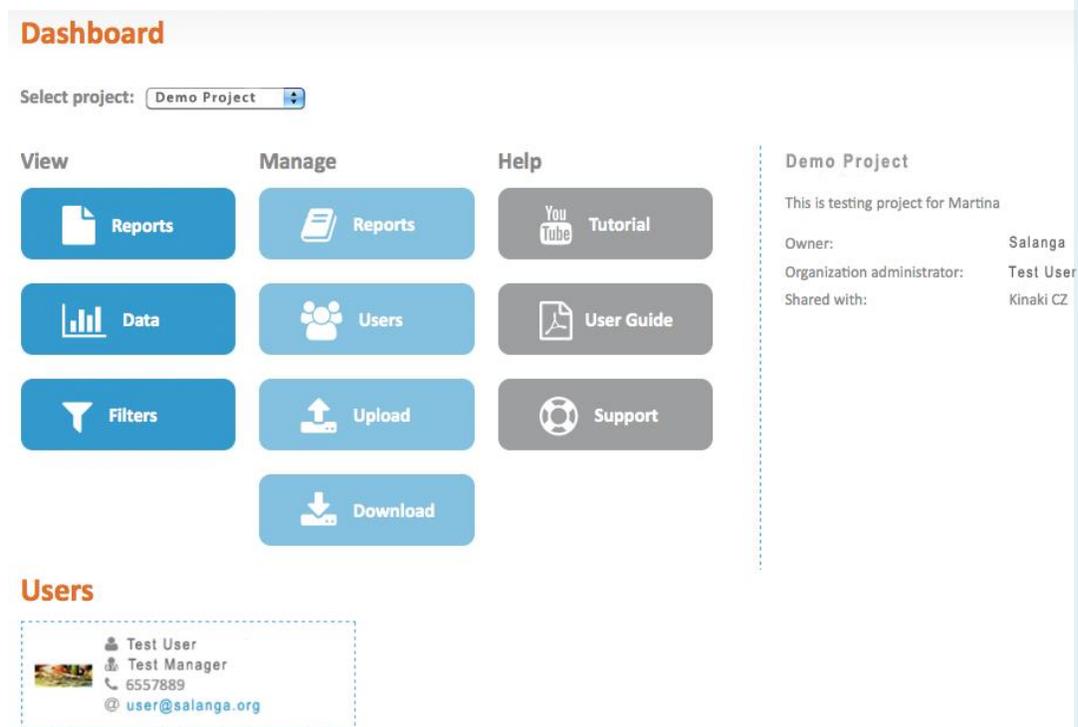


## Dashboard

After you log in to Kinaki platform you will be directed to a Dashboard page.

This page:

- shows the most commonly used functions and enables quick and easy navigation within the Kinaki platform
- gives an overview of the project that you are working on
- shows the names and roles of users who have access to the selected project



**Dashboard**

Select project:

View	Manage	Help
 Reports	 Reports	 Tutorial
 Data	 Users	 User Guide
 Filters	 Upload	 Support
	 Download	

**Demo Project**

This is testing project for Martina

Owner: Salanga  
Organization administrator: Test User  
Shared with: Kinaki CZ

**Users**

-  Test User
-  Test Manager
-  6557889
-  user@salanga.org

## Step 2 – Project Selection

If you have multiple projects, you can change the project you are working on by selecting the project from the drop down menu.

### Dashboard

Select project:



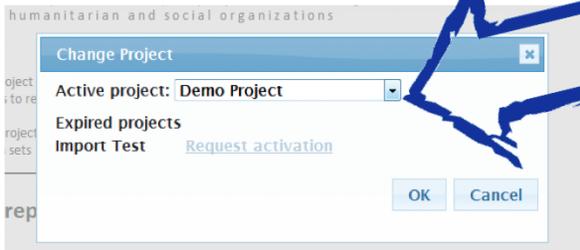
Another way to change the project is by clicking on the name of the project in the upper right-hand corner of your screen.

**Reports** [Offline App](#) [Support](#) [Contact](#)

user@salanga.org  
Demo Project / Emma  
Log off



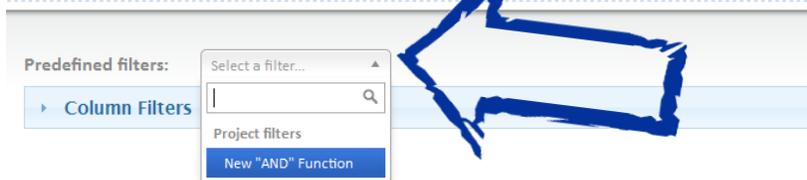
In the dialogue box that appears, select a new project.



## Step 2

Select the project  
you want to  
work on

## Step 3 – Predefined Filters



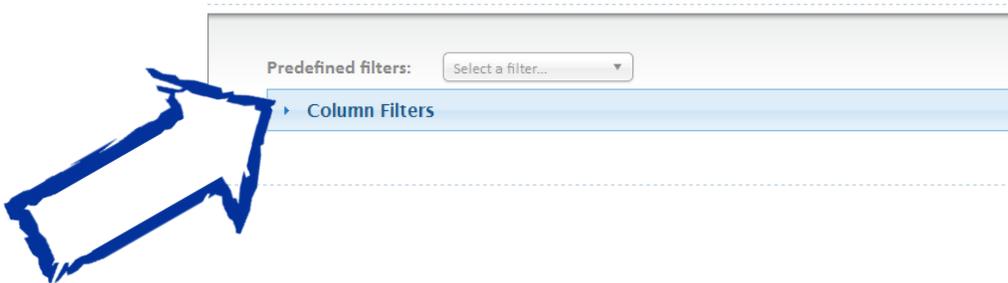
Predefined filters will help you access commonly used, previously saved, filters which will quickly calculate indicators that you have already defined.

**Tip:**

Predefined filters can be used for automated reports to provide regular reporting to your donors or partners. Making your own pre-defined filters is explained in Step 13.

## Step 4 – Displaying Column Filters

(Data Collection, Groups and Questions)



Column filters are used for selecting groups of indicators and questions to be displayed in the results table.

**Tip:**

You don't need to use Column filters if you already selected a Predefined filter (Step 3), unless you want to check what values are included in the predefined filter.

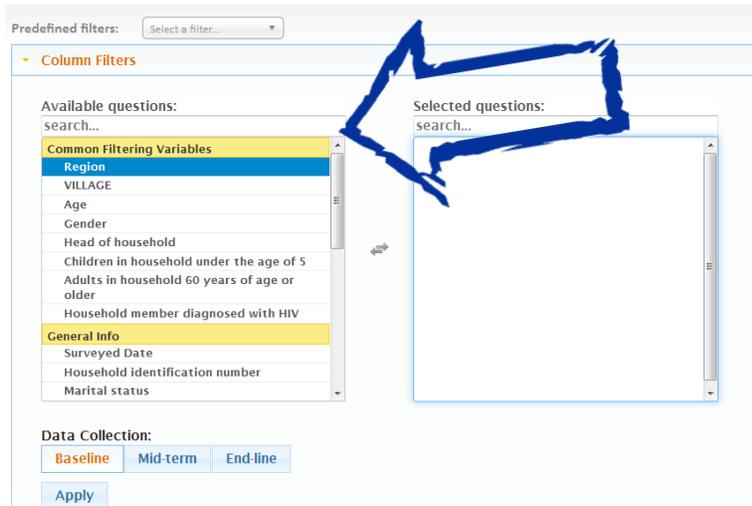
## Step 3

Select predefined filters  
OR  
Continue to the next step

## Step 4

Display Column Filters menu by clicking on the arrow beside 'Column Filters'

## Step 5 – Selecting Column Filters



### Step 5

Select data collection(s)

AND

Select the question(s) you want to display in statistics

Click on the **APPLY** button

There are two actions to be done within the Column Filters:

- 1) **Questions** – Questions are the most basic units, that is, the variables that will be displayed in the results table. To make the selection of particular questions easier, all questions are grouped together based on sectors (themes) or other logical units, as they are usually grouped in a questionnaire. The names of each group are highlighted in yellow to make it easy to find the question you are looking for

**Tip:**

The wording of questions is shortened to a “question name” and number (if assigned) - which is decided upon during project set-up in Kinaki.

- 2) **Data Collection** – This second action allows you to choose which data collection you want the display to work with. A data collection can be, for example, a Baseline Survey, Midterm Data Collection, End-line Survey or Evaluation. It can also be data gathered for quarterly or annual reports, tracking activities, or any other data collection you set up in your project.

You need to select at least one Question and one Data Collection to be able to proceed to the next step. When you select a question from the ‘Available Questions’

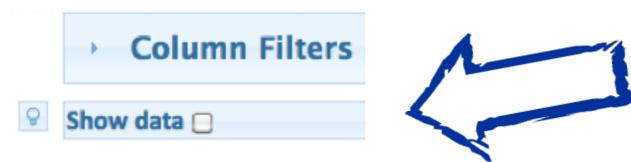
**Note:** Data cannot be displayed if you do not select at least one option for each filter (Data Collection and Available Questions)

menu, it will move to the 'Selected Questions' menu. If you are having trouble finding a question, use the search function at the top of either menu. When you have selected your Question and Data Collection, click on the 'Apply' button.

**Tip:**

The first group of questions is called 'Common Filtering Variables' – this group contains variables you may often use in calculating your results, e.g.: specific beneficiary groups or other key sorting variables (gender, age, district, households with people with HIV, children under 5, etc.). These questions are always automatically selected. This group of variables is defined during the project set-up in Kinaki.

## Step 6 – Possibility to hide / display all of the Original Data



This function allows you to hide or display all of the data from all the respondents. If you want to look through the data used for the results table and charts, you can display it by ticking the button 'Show data'. The table with the data will then appear as below.

Data:							
Baseline	Marcela	Toha	35	Female	✓	✓	✗
Baseline	Marcela	Toha	57	Male	✗	✗	✗
Baseline	Marcela	Toha	63	Female	✓	✓	✓
Baseline	Marcela	Toha	35	Male	✓	✗	✗
Baseline	Marcela	Panu	42	Female	✓	✓	✗
Baseline	Marcela	Toha	58	Male	✓	✓	✗

**Tip:**

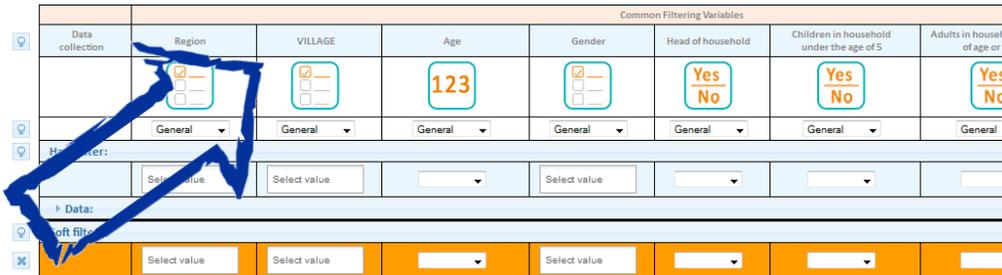
You can scroll through all of the original data by guiding your cursor inside the Data Source Table and scrolling up and down through the data.

## Step 6

Hide or display the Data Source Table

**Note:** Displaying Data Source Table may increase the time needed for the system to respond and may require a faster Internet connection

## Step 7 – Selected Questions



Common Filtering Variables							
Data collection	Region	VILLAGE	Age	Gender	Head of household	Children in household under the age of 5	Adults in household of age or older
			123		Yes No	Yes No	Yes No
	General	General	General	General	General	General	General
Hard filters:	Select value	Select value		Select value			
Data:							
Soft filters:	Select value	Select value		Select value			

Once the Data Collection and Question(s) are selected and loaded (by clicking the 'Apply' button) Kinaki will display the Selected Question(s) as well as variables from the 'Common Filtering Variables' category (please refer to [Step 5](#) for more information).

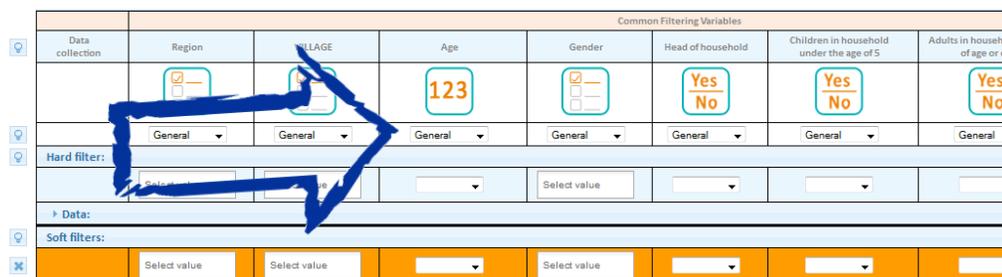
**Tip:**

If you hover the cursor above the column title, you will see the entire question as it was asked in the questionnaire during data collection.

## Step 7

Read the entire Question as it was asked in the original data collection

## Step 8 – Data Filtering – Data Type



Common Filtering Variables							
Data collection	Region	VILLAGE	Age	Gender	Head of household	Children in household under the age of 5	Adults in household of age or older
			123		Yes No	Yes No	Yes No
	General	General	General	General	General	General	General
Hard filters:	Select value	Select value		Select value			
Data:							
Soft filters:	Select value	Select value		Select value			

Selecting the data type allows you to determine what kind of data will be displayed in the results table. There are five data types to choose from:

**General:** Displays the number of responses according to the selected filter, the total number of respondents to the question, and the percentage, e.g. 20% (40/200)

## Step 8

Select the data type to determine how the data will be displayed in the results table

If *no* hard filter is applied it displays “Percentage (Number of soft filtered / Total count)”

If a hard filter *is* applied it displays “Percentage (Number of soft filtered / Number of hard filtered)”

**Percentage:** Calculated the same way as when the ‘General’ data type is selected, but only the percentage calculation is visible.

**Count:** Displays the number of responses to a question (e.g. if 10 people respond to a question, the count is 10)

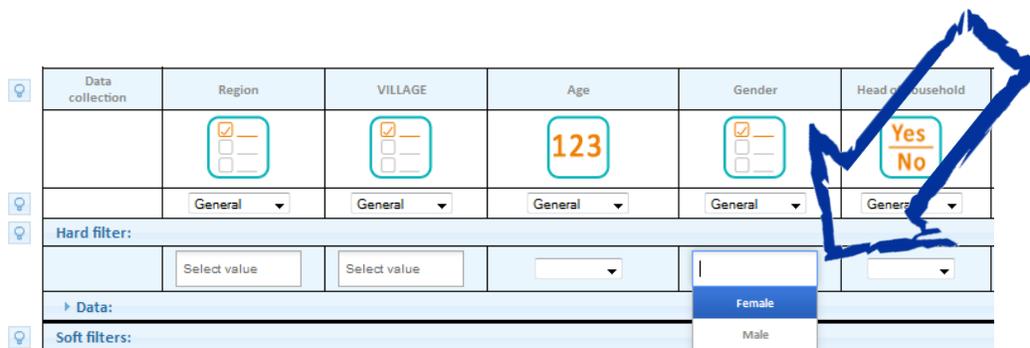
*Note: for “Yes/No” questions, only “Yes” responses are counted. Use the “General” data type function to view the count for “No” or “Empty” responses.*

**Sum:** Displays the sum of all numbers (available only for questions with a numeric response)

**Average:** Displays the average of all numbers (available only for questions with a numeric response)

**Tip:** To better determine what kind of data you want to display, hover your cursor over the question type icon, and a tooltip will appear to show you the kind of data that was gathered (e.g. numeric response).

## Step 9 – Data Filtering – Hard Filter



Data collection	Region	VILLAGE	Age	Gender	Head of household
			123		
	General	General	General	General	General
<b>Hard filter:</b>					
	Select value	Select value			
<b>Data:</b>				Female	
<b>Soft filters:</b>				Male	

The Hard Filter tool provides you with the opportunity for “absolute” data filtering. For example:

## Step 9

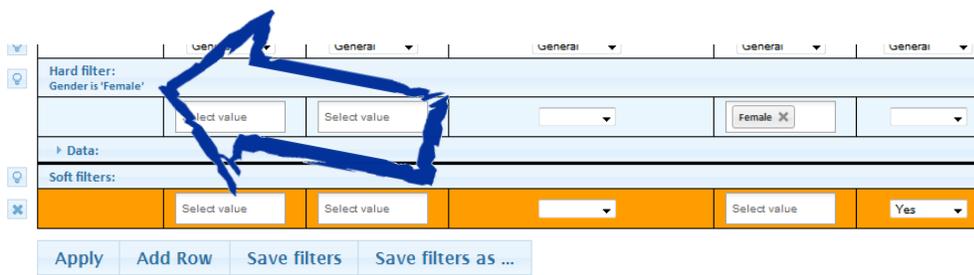
Select absolute data filtering by using the “Hard Filter” tool (if applicable)

Click on the **APPLY** button

If you want to analyze data from respondents from a specific geographic area or only respondents belonging to one of your target groups (e.g.: people with children under 5), you can select these criteria from the column corresponding to these variables in the Hard Filter row. You can select multiple criteria in one column by pressing CTRL and clicking on the criterion you want to select. You can also select criteria in multiple columns.

After you select all the Hard Filter criteria you need, click on the 'Apply' button to activate the filter (you can use any 'Apply' button visible).

When Hard Filter criteria are selected, Kinaki will add a note about the selected filter criteria under the Hard Filter's title and in the Results Table as shown on the following picture:

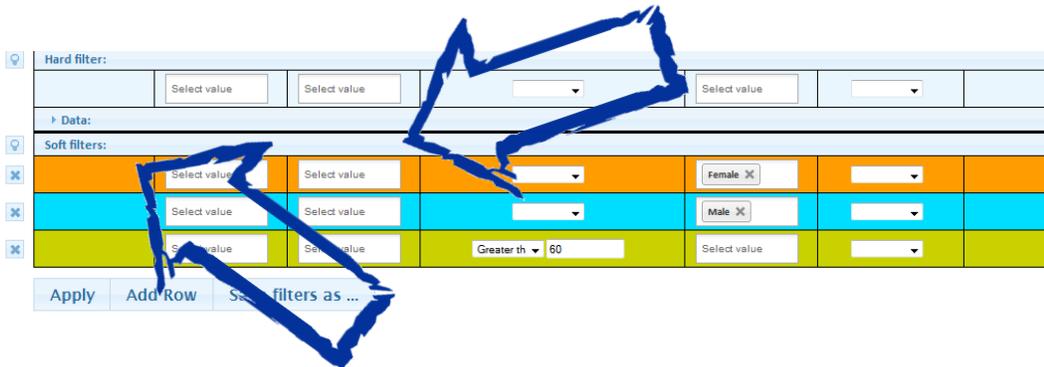


The screenshot shows the filter configuration interface. The 'Hard filter' section is titled 'Gender is 'Female'' and contains several columns with 'Select value' text boxes and dropdown menus. One dropdown menu is set to 'Female'. Below this is a 'Soft filters' section with similar controls. At the bottom of the filter section are buttons for 'Apply', 'Add Row', 'Save filters', and 'Save filters as ...'. Below the filter section is the 'Results Table'.

		Livelihood	
Gender is 'Female'	Total household income for last month	Source of income	
	Baseline	Baseline	

Note: Selecting any values in Hard Filter will affect all tables below. Only data matching your selection will be displayed in the Data Source Table and will also be used in the results table and chart

## Step 10 - Respondents Comparison - Soft Filter



The screenshot shows a 'Soft filters' section with a table. The table has columns for 'Select value', a dropdown menu, and a radio button. The rows are color-coded: orange, blue, and green. A blue hand-drawn box highlights the 'Apply' button and the 'Add Row' button.

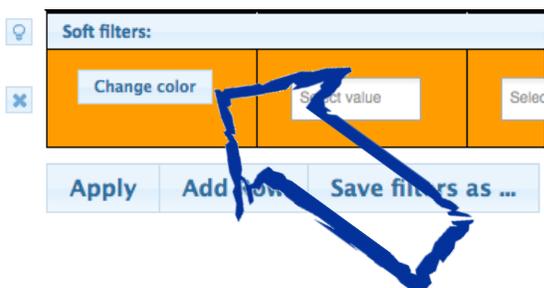
Soft Filtering is a tool that allows you to compare different groups of respondents. Each Soft Filter row represents (and will correspondingly create) a row in the Results Table with the values of selected criteria for that filter. For users of MS Excel, Soft Filters are a function similar to that of a Pivot Table.

You can select criteria from multiple columns at the same time (e.g. if you want to filter for responses from women who are over 60 years of age and heads of their household). You can add or delete each filter row in order to create a customized Results Table.

Values selected in a Soft Filter will determine how the results will be calculated in the Results Table for each question selected in [Step 5](#).

**Tip:**

You can change the colour of each soft filter line based on your preference. The colour of the soft filter reflects the respective column in the Results Table.



The screenshot shows a 'Soft filters' section with a table. The table has columns for 'Change color', 'Select value', and 'Select'. A blue hand-drawn box highlights the 'Change color' button and the 'Select value' dropdown menu.

## Step 10

Select values in Soft Filters to compare different groups of respondents. Add more Soft Filters (rows) as needed

Click on the **APPLY** button

## Step 11 – Results Table and Chart

The Results Table shows results relevant to the Question(s) you selected in [Step 5](#) with a breakdown for each answer (columns) of the selected Question, as well as the breakdown based on the Soft Filter(s) selected (rows).

The Results Table only shows the data allowed by the Hard Filter, if selected (as described in [Step 9](#)).

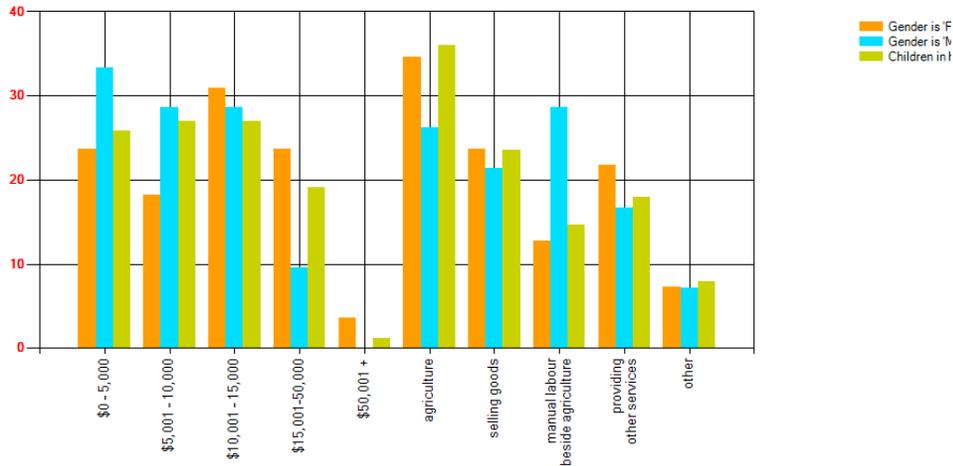
In the event that more than one data collection was selected, the Results Table and Chart, will show data for each question, broken down by each data collection.

## Step 11

View or export the Results Table or related Chart

Gender is 'Female' AND Head of household is yes	23.6% (13/55)	18.2% (10/55)	30.9% (17/55)	23.6% (13/55)	3.6% (2/55)	34.5% (19/55)	23.6% (13/55)	12.7%
Gender is 'Male' AND Head of household is yes	33.3% (14/42)	28.6% (12/42)	28.6% (12/42)	9.5% (4/42)	0.0% (0/42)	26.2% (11/42)	21.4% (9/42)	28.6%
Children in household under the age of 5 is yes	25.8% (23/89)	27.0% (24/89)	27.0% (24/89)	19.1% (17/89)	1.1% (1/89)	36.0% (32/89)	23.6% (21/89)	14.6%
<b>Total (no soft filter)</b>	<b>25.2% (36/143)</b>	<b>25.9% (37/143)</b>	<b>28.0% (40/143)</b>	<b>18.9% (27/143)</b>	<b>2.1% (3/143)</b>	<b>32.9% (47/143)</b>	<b>25.2% (36/143)</b>	<b>16.8%</b>

Chart:



[Export Results to Excel](#)

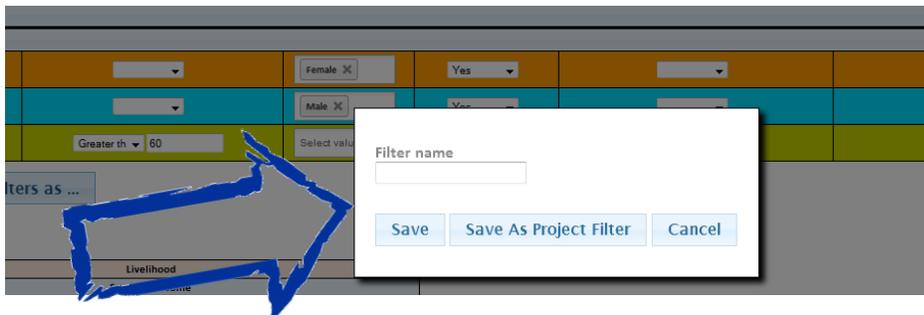
[Export Data to Excel](#)

[Export All Data to Excel](#)

## Step 12 – Saving Filters



If there is a certain filter you will be referring to often (e.g. using the results in reports and/or ongoing analysis) you can save the filter by selecting the “Save filters as...” button.



A dialogue box will appear where you can name the filter. If you want to share the filter with your other colleagues working on the project select “Save As Project Filter” (the filter will be available for all other users on the project). If the filter is for your personal use, simply select “Save”.

### Tip:

To keep project filters organized, easy to use and accessible, a naming system should be agreed upon by all of the users of that project. For example, all filters could be numbered according to the corresponding results in the logic model or they could be named by group.

## Step 12

### Saving Filters

Save time by saving frequently used filters. After saving, the filter names will appear in the drop down menu at the top of the page and will be called ‘Predefined Filters’ for quick access.

## Step 13 – Report Center

In the Report Center you will find reports that are shared with you. There may be several reports available to view within one project. In order to choose a specific report, select the report from the drop down menu.

### Report Center

Report:



You can export the selected report into Excel to further edit or analyze the data by selecting the respective button at the end of your report.

You can then print your report. The print button can also be found at the end of your report.



## Step 13

Select the report  
you want to  
work with