KOBOTOOLBOX USERS' GUIDE

The KoBoToolbox is a versatile and powerful open-source platform designed for data collection, management and analysis.

Whether conducting surveys or monitoring programs, it serves as a reliable solution for the Project in collecting, managing and analyzing data efficiently and effectively.

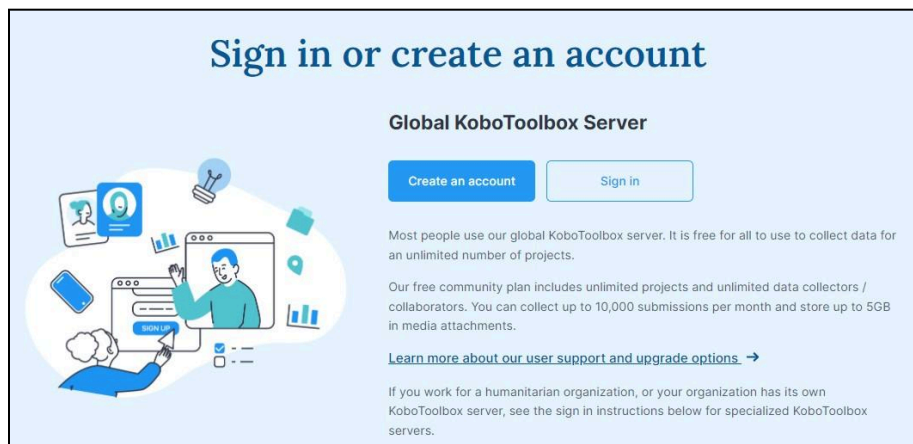What do you need to make use of the Tool?

a. A laptop that is connected to the internet
b. A smartphone or tablet that has a GPS/Location capabilities (preferred)
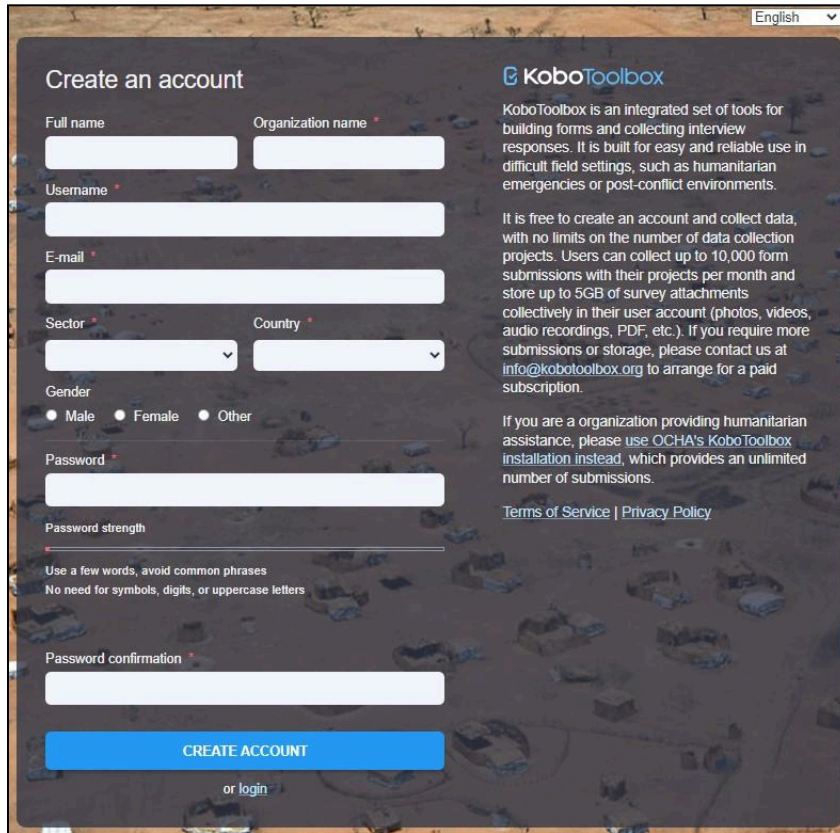
Creating an account

1. On your browser, go to this link : http://www.kobotoolbox.org/
2. Click "Create an account"

3. Select "Create an Account"

4. Fill out all the required information *
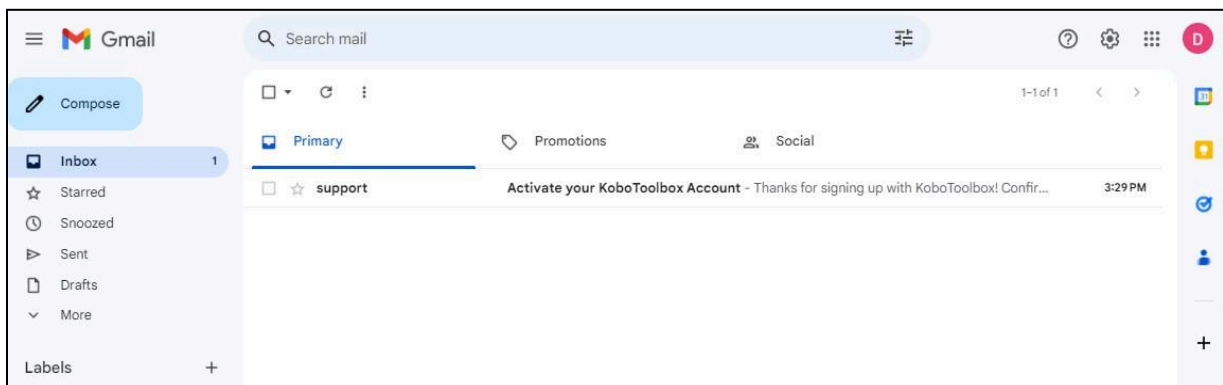5. On Sector –> Choose - Other
6. Click "CREATE ACCOUNT"

7. A link will be sent thru your email to activate you KoBoToolbox account

8. Open your email used in your registration,

9. Select the email with subject entitled "support" and click the "link" to activate
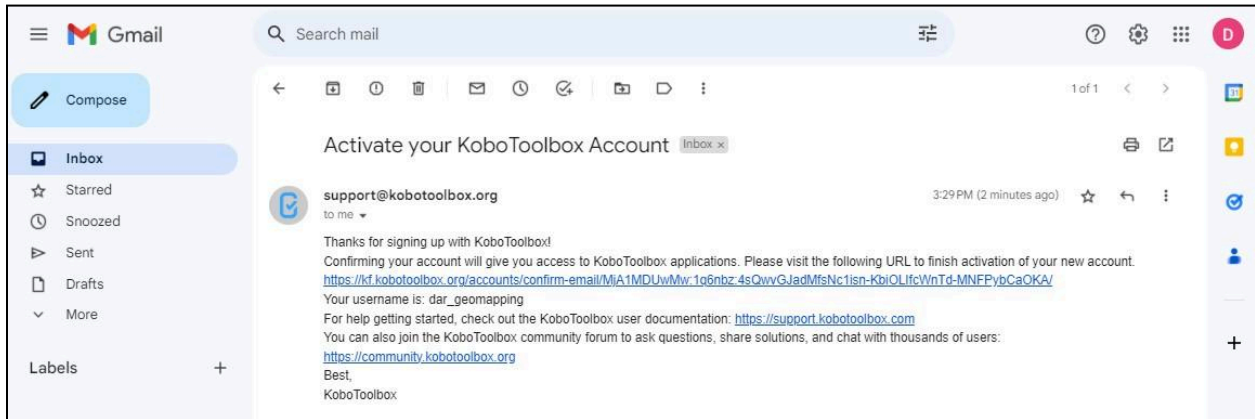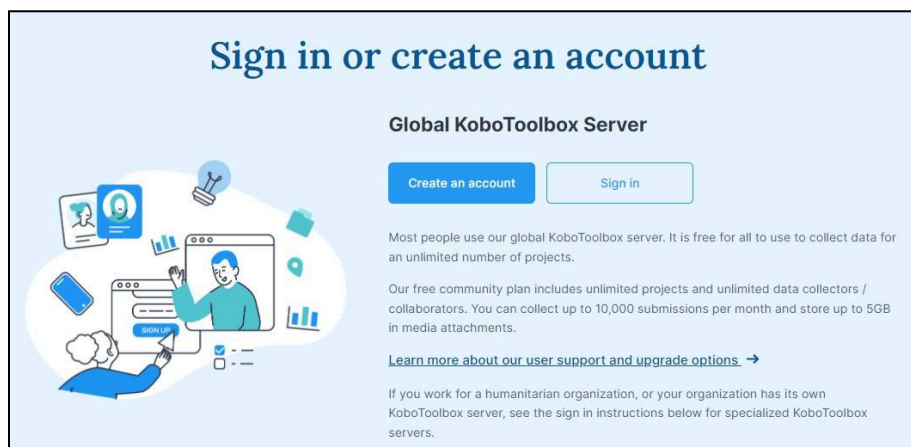

10. Click "CONFIRM"

11. You are now ready to sign-in to the KoBoToolbox

12. Log-in using your Username and password, then click "LOGIN"

<mark>Creating a Project from Scratch</mark>

13. The Main Page in KoBotoolbox will be displayed as shown below
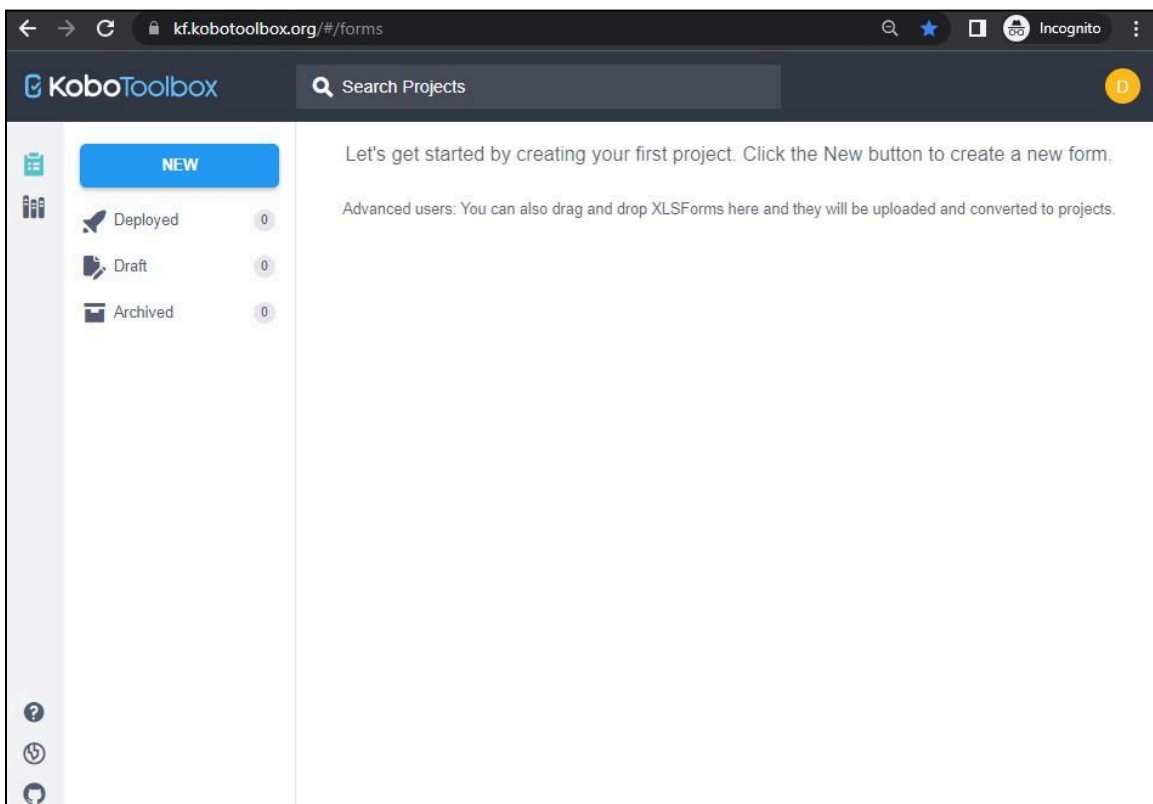
14. Familiarize with the User Interface of KoBoToolbox
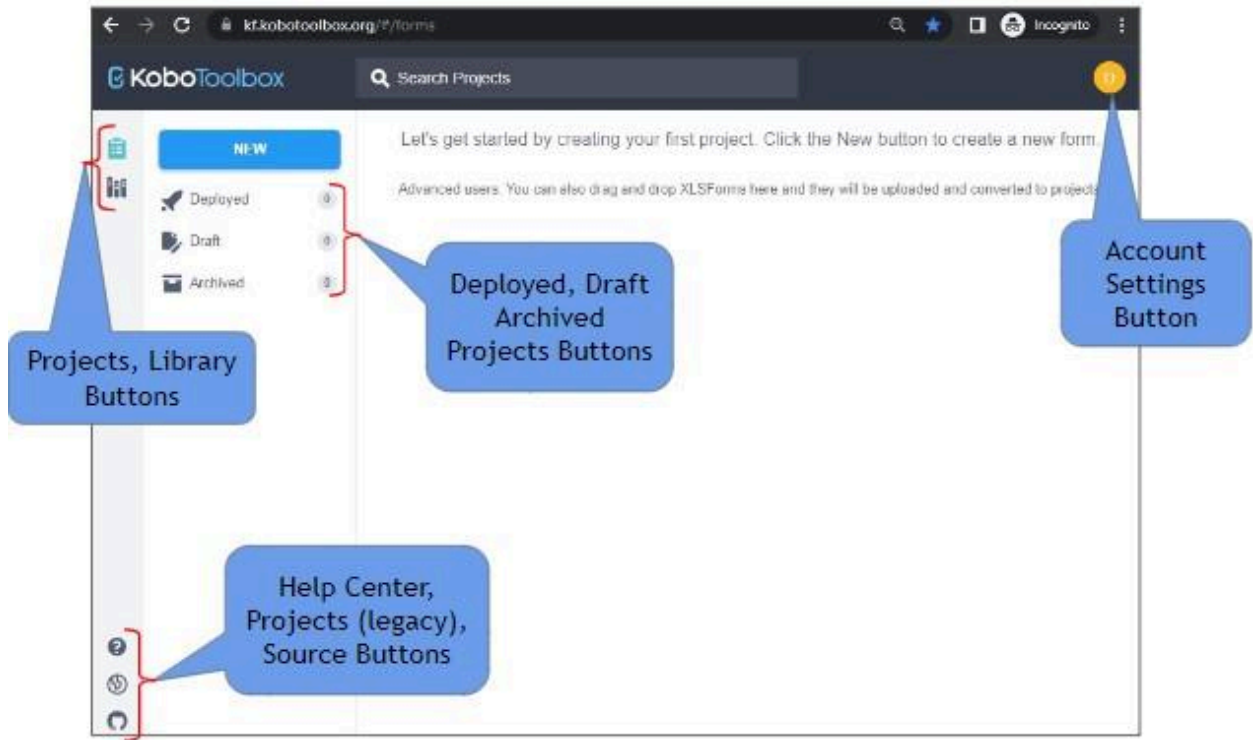
15. Create Data Collection Form
16. Click "NEW"
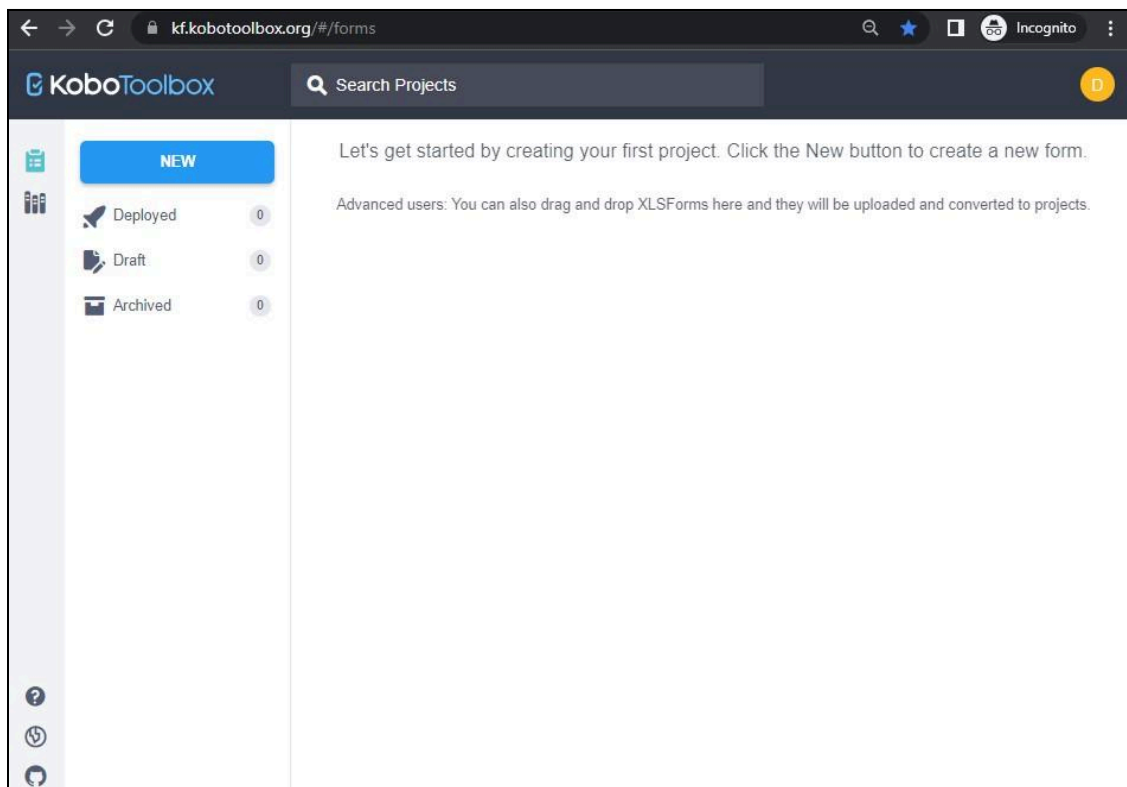
17. A menu of how to create the Project will be displayed
18. Select "Build from scratch"

19. A Project Details Input window will appear
20. Encode all required fields to continue
21. On Sector, select "Others"
22. Click "Create Project"

23. The Main Page in creating a form is displayed
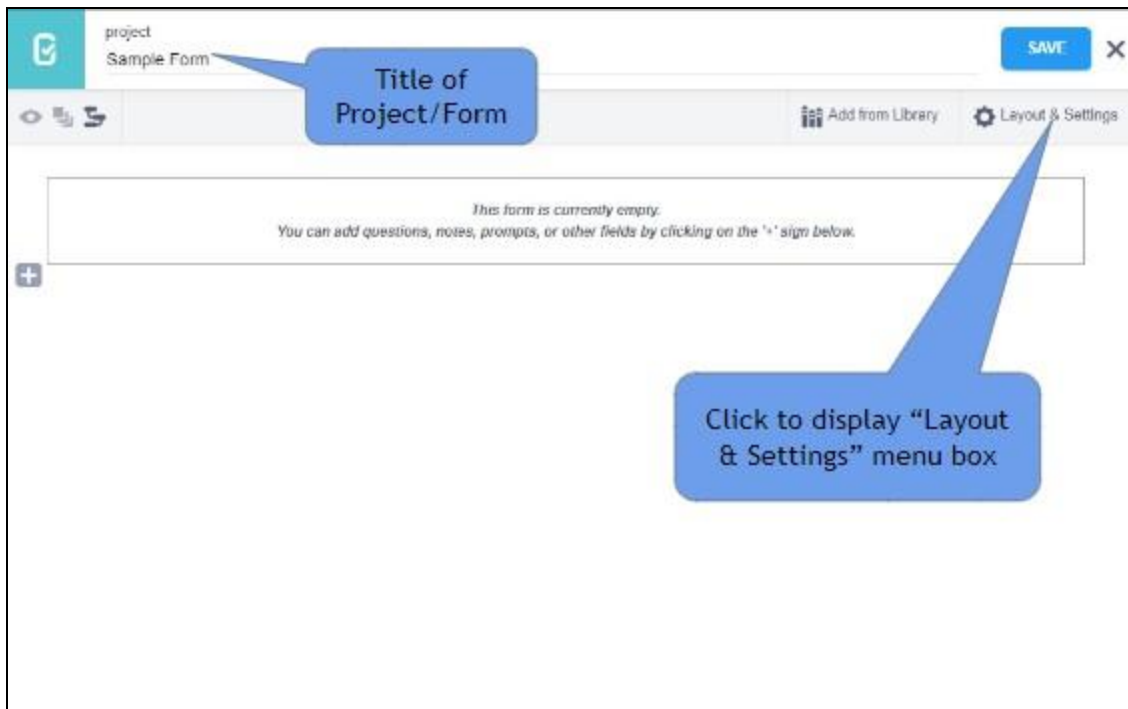
24. Open the "Layout & Settings" window

25. Type in the box provided the Question as how it will be displayed on the actual form.
26. Click on the "ADD QUESTION" to choose what type of question this is.
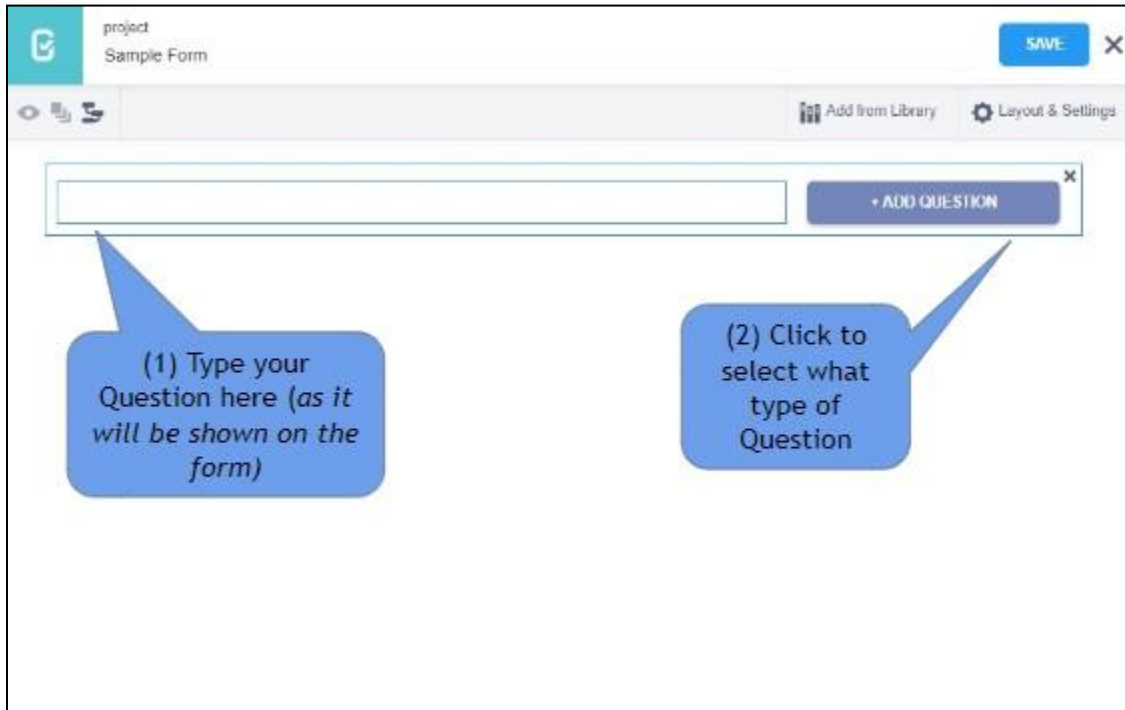
27. For this example choose "text" type by clicking it
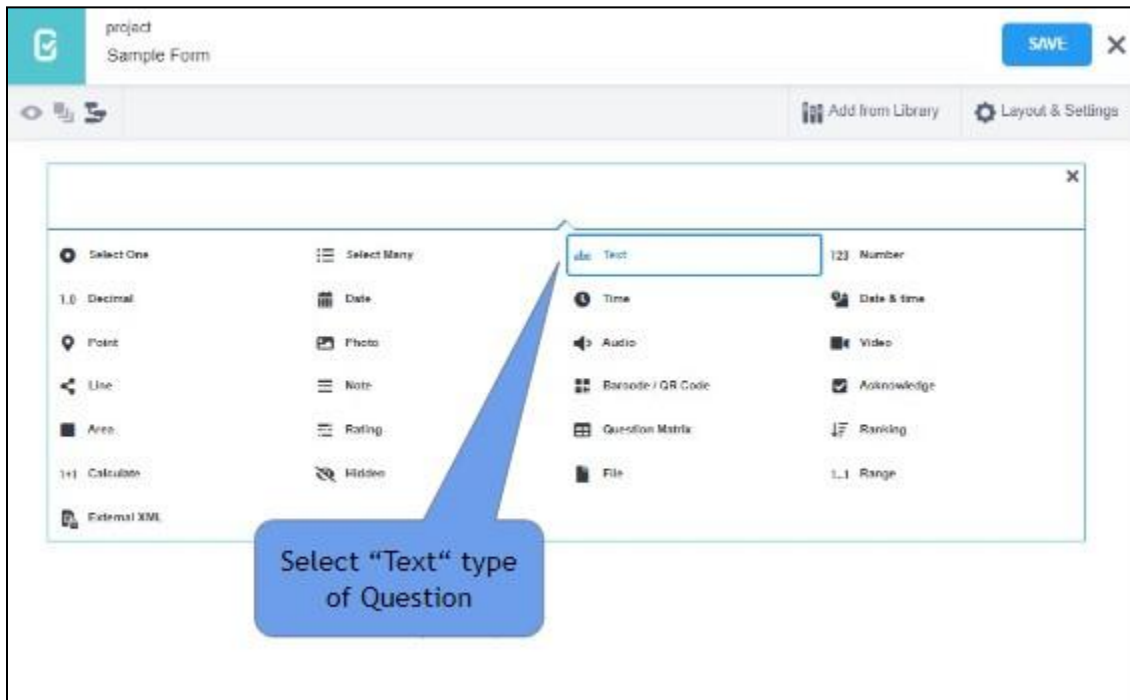
28. This screen will be displayed showing the icons on the right side of the question, the Settings, Delete Question, Duplicate Question and Add Question in Library.
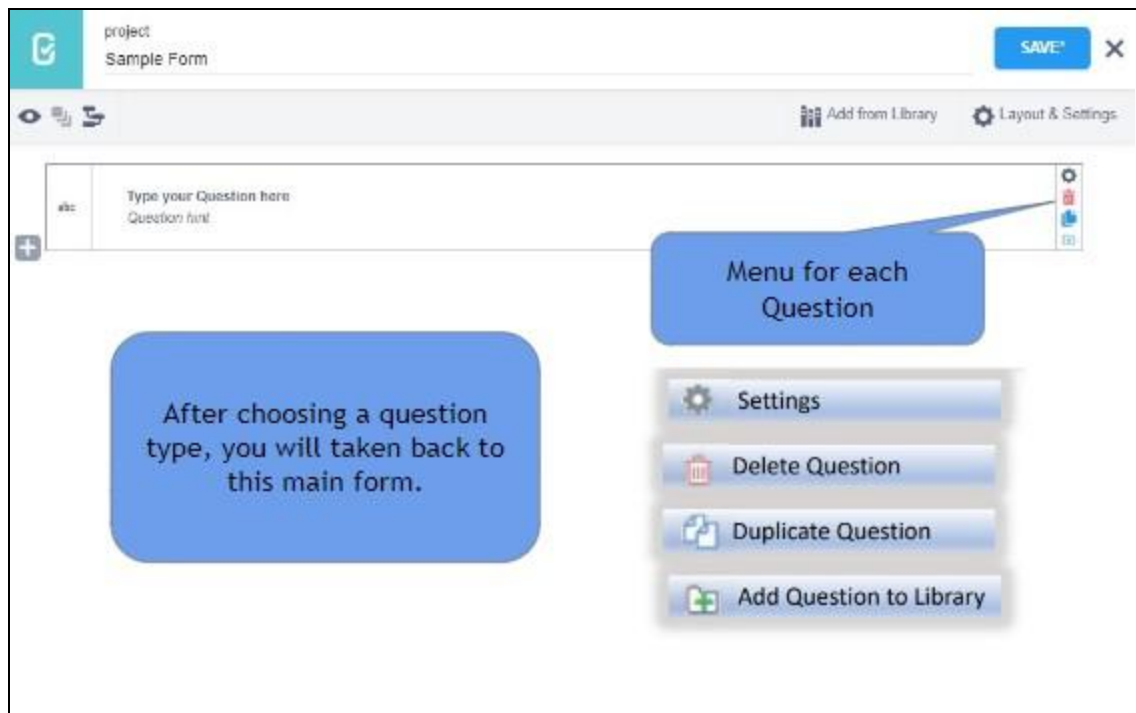
29. Selecting Settings will display more choices on how you will configure the particular question, how it will respond to entries based on the conditions given.
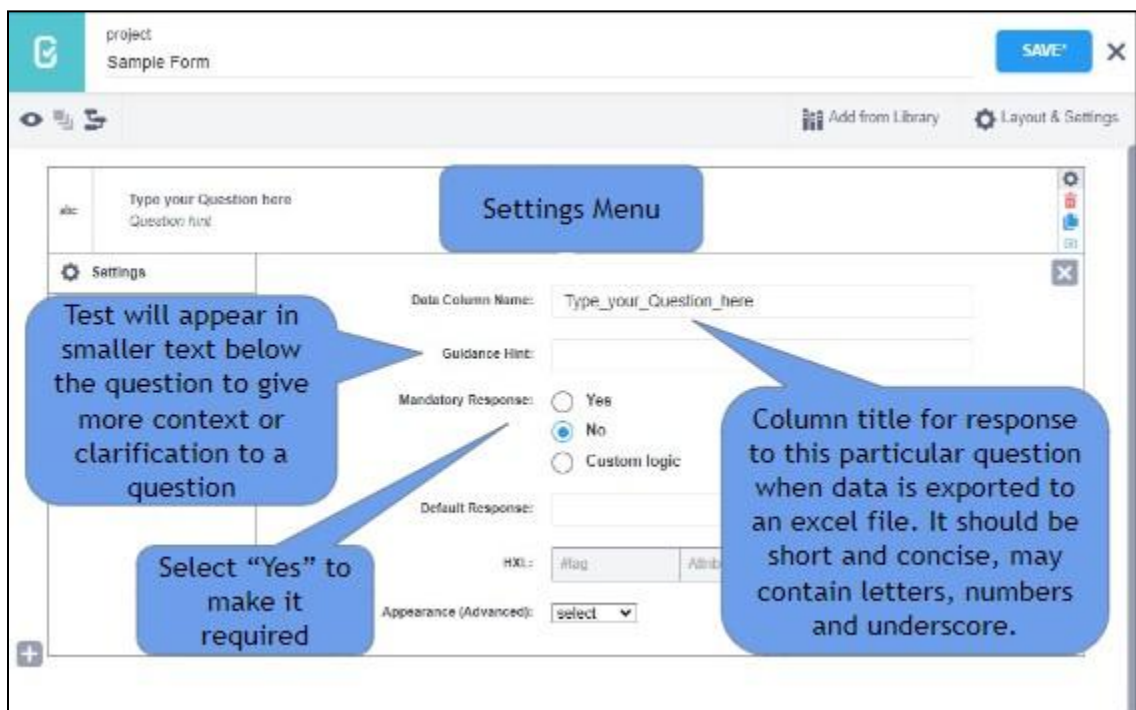
30. Add another Question by selecting the "Plus" sign just below the existing question
31. Type the "Question Text" then click the "+ADD QUESTION" button
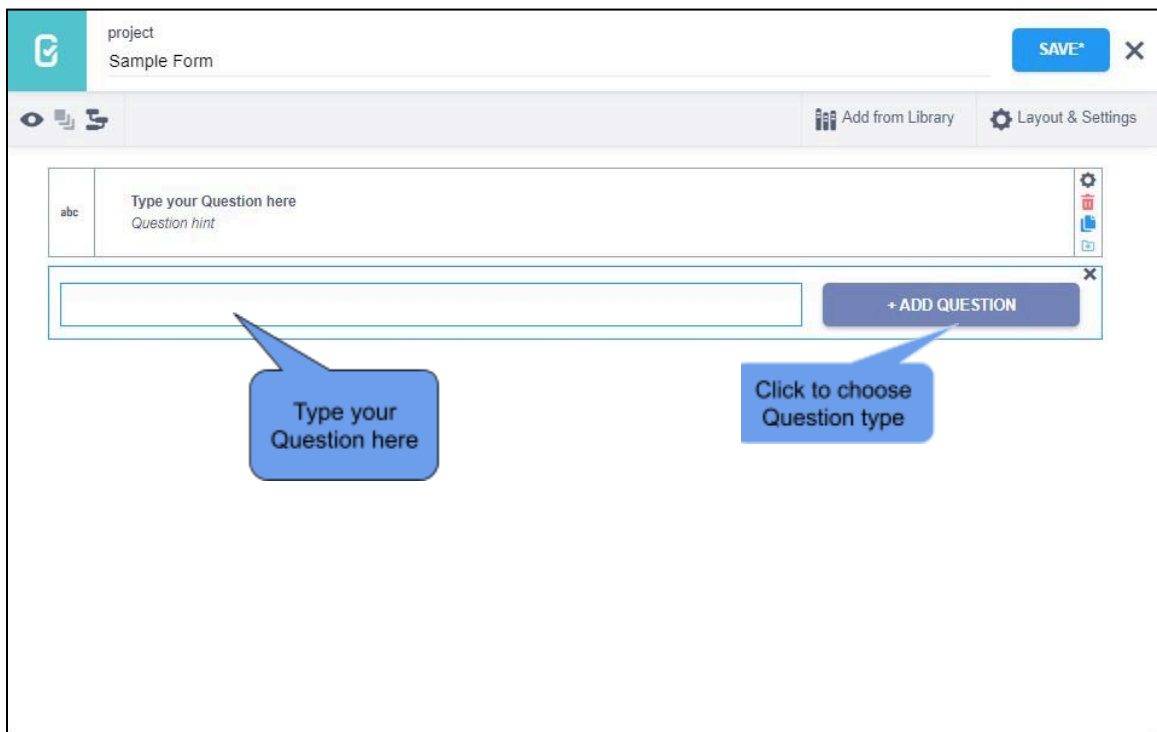
32. Select the "Select One" type.
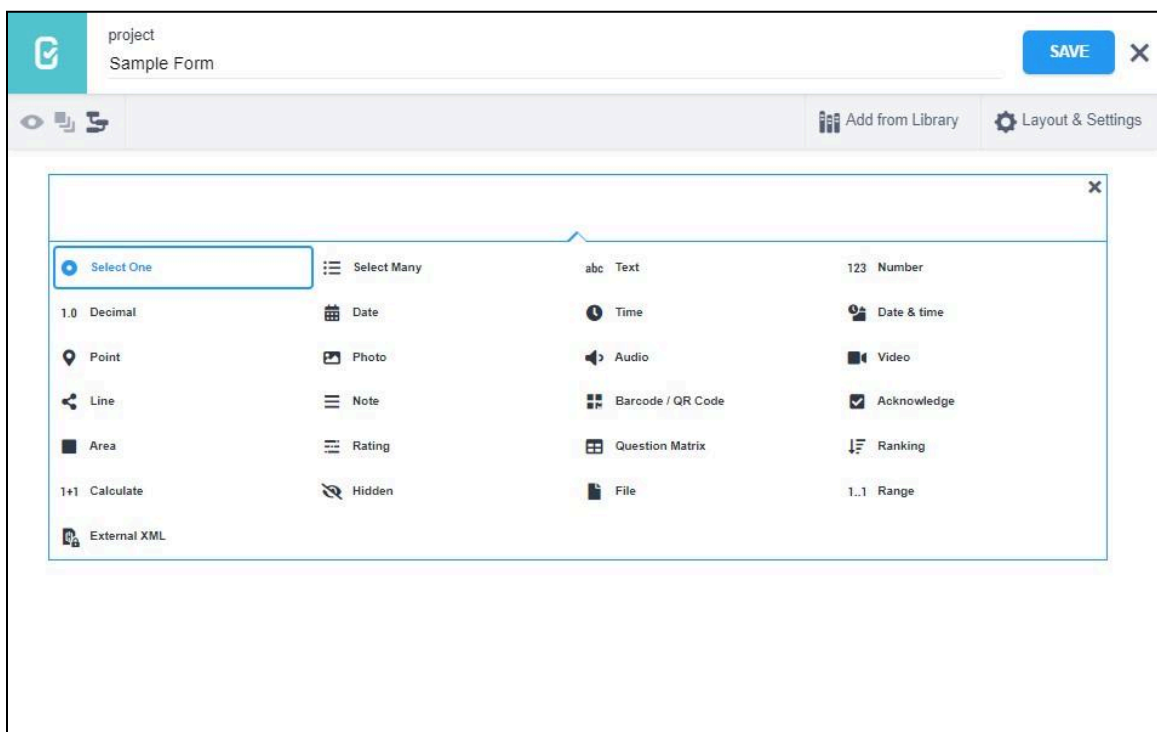
33. Enter all the possible answers as a choice to the question.
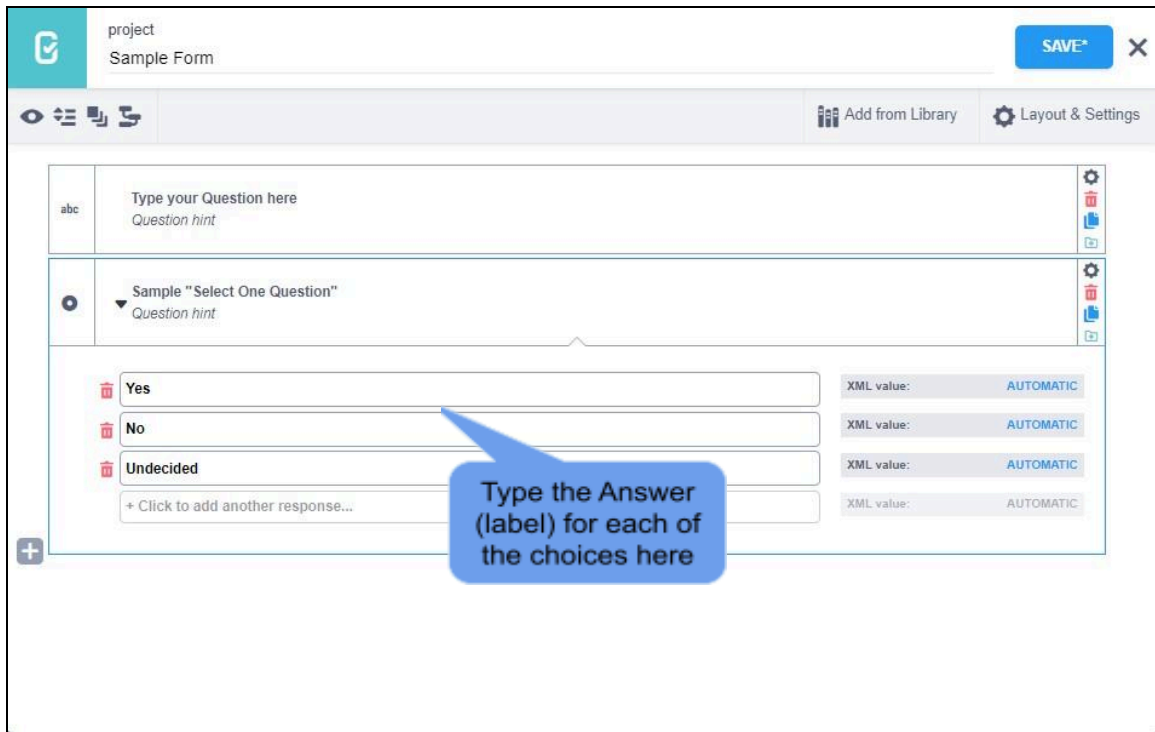
34. Make sure to click the "SAVE" button to save changes made to the Project as often as possible so as not to lose your latest updates on your Project.
35. On Settings, choose "Skip Logic" to display the screen as shown below
36. Select "+ADD A CONDITION" to create a condition for this specific question.

37. By adding a condition to the question, this window below will be displayed
38. Choose your reference question to base the behavior of the current question, if it will be displayed or not, based on the condition/s created.
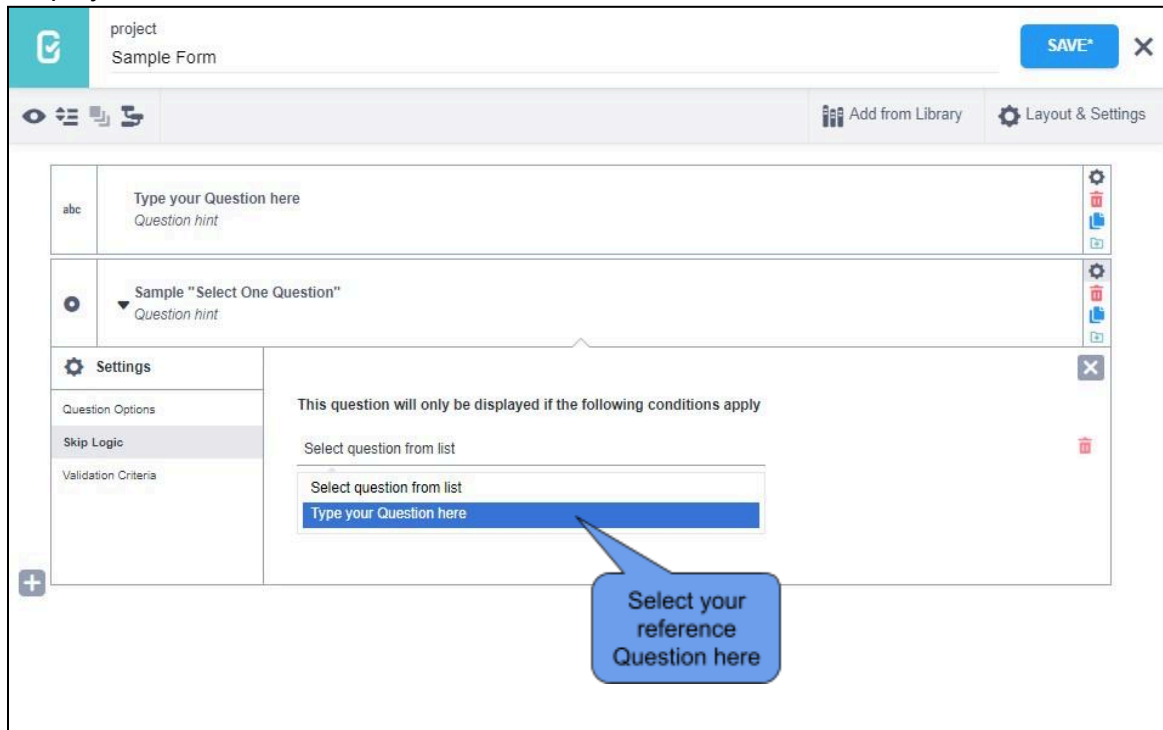
39. Select what condition should it be, "**Was answered**", "**Was not answered**", "**Equal to**" or "**Not Equal to**"
40. You can click "ADD ANOTHER CONDITION" if needed
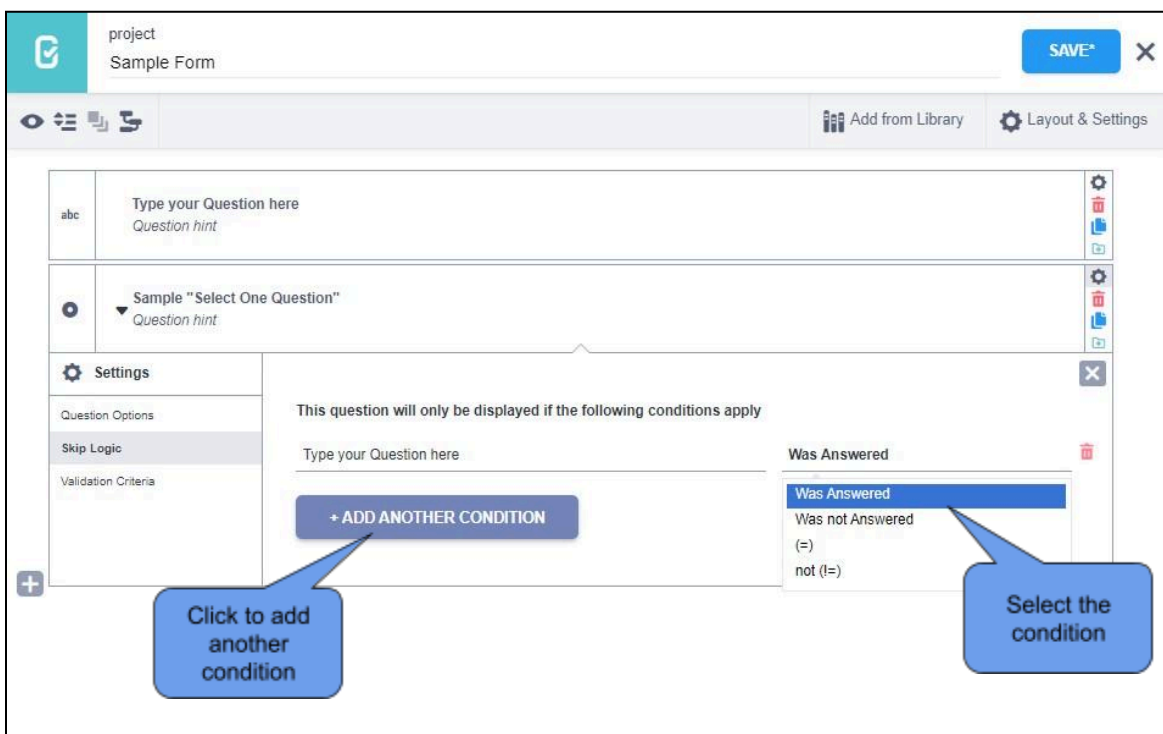
Exploring the different Question Types
Question types and their corresponding Answer Input

Question type	Icon	Answer input
integer	123	Integer (i.e., whole number) input.
decimal	1.0	Decimal input.
range	1..1	Range input (including rating).
text	abc	Free text response.
select_one [options]	⦿	Multiple choice question; only one answer can be selected.
select_multiple [options]	☰	Multiple choice question; multiple answers can be selected.
select_one_from_file [file]	⦿	Multiple choice from file; only one answer can be selected.
select_multiple_from_file [file]	☰	Multiple choice from file; multiple answers can be selected.
rank [options]	n/a	Rank question; order a list.
note	≡	Display a note on the screen, takes no input. Shorthand for type=text with readonly=true.
geopoint	📍	Collect a single GPS coordinate.
geotrace	⌇	Record a line of two or more GPS coordinates.
geoshape	■	Record a polygon of multiple GPS coordinates; the last point is the same as the first point.
date	📅	Date input.
time	🕐	Time input.
dateTime	🕑	Accepts a date and a time input.
image	🖼	Take a picture or upload an image file.
audio	🔊	Take an audio recording or upload an audio file.
background-audio	☰	Audio is recorded in the background while filling the form.
video	🎥	Take a video recording or upload a video file.
file	📄	Generic file input (txt, pdf, xls, xlsx, doc, docx, rtf, zip)
barcode	⚏	Scan a barcode or QR Code
calculate	1+1	Perform a calculation; see the Calculation section below.
acknowledge	☑	Acknowledge prompt that sets value to "OK" if selected.
hidden	🚫	A field with no associated UI element which can be used to store a constant.

41. List of Question Types in KoboToolbox

● Select One	☰ Select Many	abc Text	123 Number
1.0 Decimal	📅 Date	🕐 Time	📅 Date & time
📍 Point	🖼 Photo	🔊 Audio	🎥 Video
⤴ Line	☰ Note	▦ Barcode / QR Code	☑ Acknowledge
■ Area	☲ Rating	▦ Question Matrix	⬇ Ranking
1+1 Calculate	🔍 Hidden	📄 File	1..1 Range
External XML			
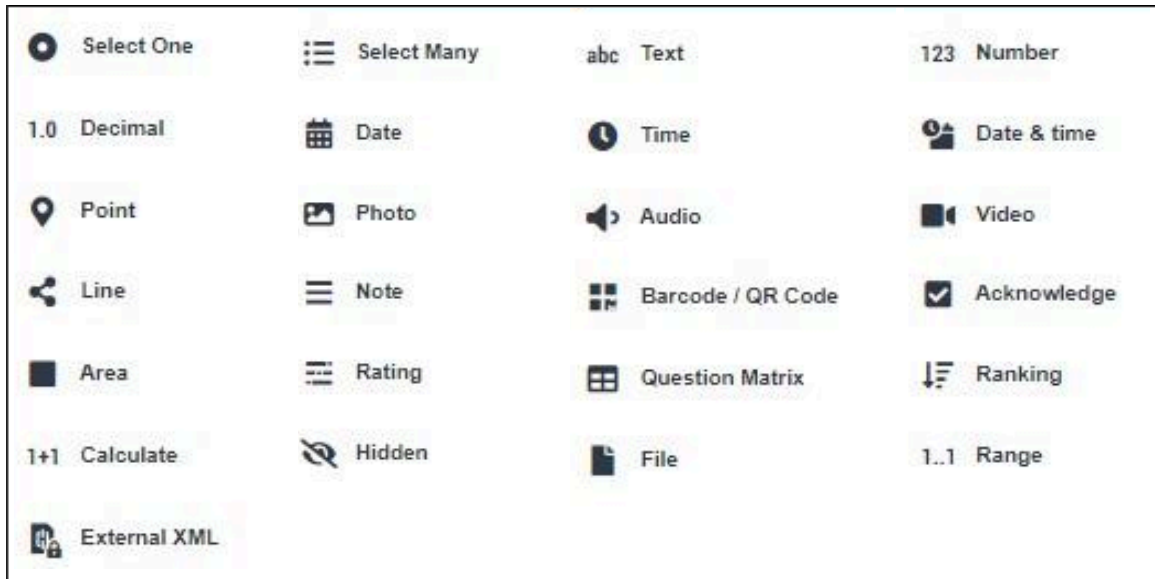
42. Description for each question type

⊙ Select One | ☰ Select Many | abc Text | 123 Number

Select One
This question type allows you to create a multiple-choice question where the user can only choose one option as an answer.

For example, if you are interviewing a beneficiary and need to know his/her status, a "Select One" question could ask the respondent to choose his/her status as "Host Community", "IDP", or "Refugee". The respondent can only fall into one of these categories.

Select Many
Similar to the "Select One" question, this option allows you to provide respondents with a list of options to choose from when answering a question. The difference is that they will be able to choose multiple answers.

For example, a question asking who benefits (e.g. women, men, children) from an implementation site should allow the respondent to select more than one of these options.

Text
A text question allows a respondent to write whatever they want as an answer. This provides for flexibility, but can lead to unstructured data and implies room for error.

For example, a question asking the respondent's name would require a text field. However, a question asking the respondent which state he/she is in may be better served by a "Choose One" so that there is no chance of a typographical error.

Number
A number question only allows the user to answer a question using whole numbers (integers).

For example, a question asking how many beneficiaries are served by a project would be best answered with a whole number. (e.g. 950) However, a question asking how much money (e.g. $199,999.95) is invested in a project would be best served by a "Decimal" question (*see next slide for details*).

1.0 Decimal

Decimal
As mentioned in the previous slide, a "Decimal" question is used when the possible answers related to numbers with decimals (fractions), such as monetary values (e.g. $149,999.99), percentages (e.g. 0.67), or weight (e.g 64.5kg).

Date

Date
A "Date" question allows the respondent to choose a date on a calendar. It does not include time.

For example, "What is your birthday?" or "What day was this survey performed on?
This question can also be useful in surveys, e.g. when asking for the birth date of a beneficiary.

Time

Time
The "Time" question allows the respondent to choose a time (e.g. 12:30).

For example, question like "What time did this survey take place" would use this.

Date & time

Date & Time
This combines the two questions to the left, allowing the respondent to choose a date on the calendar and enter a time.

For example, "When exactly was this survey?" Given date and time are in the same question, the output in Excel will also be combined in the same cell. This allows for quick sorting of entries by old and newer ones.

Point

Point
A "Point" question will use your phone's in-built GPS (Global Positioning Service) device to find where you are. It includes results in latitude and longitude, (together they constitute the coordinates of the respective location on earth) as well as altitude, and accuracy values. Accuracy tells you how precise the collected coordinates are in meters. This question should be used in almost every survey.

Photo

Photo
This allows respondents to take photos on-site, or upload photos they have saved on their smartphones. The photos will be saved on the server and directly connected to each data entry through a hyperlink. On-site photos are very valuable for the purposes for M&E purposes. When carrying out surveys, it be may be advisable not to take photos of respondents, but for instance take a picture of a paper sheet.

Audio

Audio
This allows a respondent to enter an audio recording into the survey. It could be useful for beneficiary interviews, recording noise levels of a site, or making audio notes in addition to filling out survey questions.

Video

Video
Similar to "Photo" and "Audio", this will allow respondents to record and upload video footage to a survey. Be careful when including video questions in forms, as file sizes can quickly become large, slowing uploads and using up data space on the account.

Line

Line
Similar to the "Point" option, a "Line" question uses your phone's GPS capabilities to draw lines on a map.

For example, if you want to map a road, you can use the "Line" option to trace its path.

Note

Note
Similar to a text field, but specifically for respondents to make a note of something.

For example, if a particular question may require additional information, it could be followed by a note.

Barcode / QR Code

Barcode / QR Code
Inserting the barcode question requires you to install a barcode reading application on your phone. KoBo will access this app when prompted with a barcode question.

For example, scanning beneficiary ID cards.

**Acknowledge**

Acknowledge
Use an "Acknowledge" question to make a respondent confirm that they have performed a task.

For example, a mandatory "I have answered this survey honestly" question.

Area
Area
Similar to the "Point" and "Line" questions, an "Area" question uses your phone's GPS to tract the geographic area of a place.

Rating
Rating
Use this to create an ordering question with multiple selection terms and options.

Question Matrix
Question Matrix
Use this to create a matrix question with multiple conditions and selection options.
(*NOTE: This question is in beta testing*)

Ranking
Ranking
Use this question to have respondents rank a number of options in a list.
(*NOTE: This question is in beta testing*)

1+1 Calculate
Calculate
This is an advanced method of performing calculations on responses to questions answered in your form if needed prior to data export.

File
File
This method is used to enter a generic file (txt, pdf, xis, xisx, doc, docx, rtf, zip)

1..1 Range
Range
This is an advanced method for calculating responses to questions answered in your form if necessary before exporting data.

==Preview Form to test entries/debugging==

43. On the main Project page (edit mode)
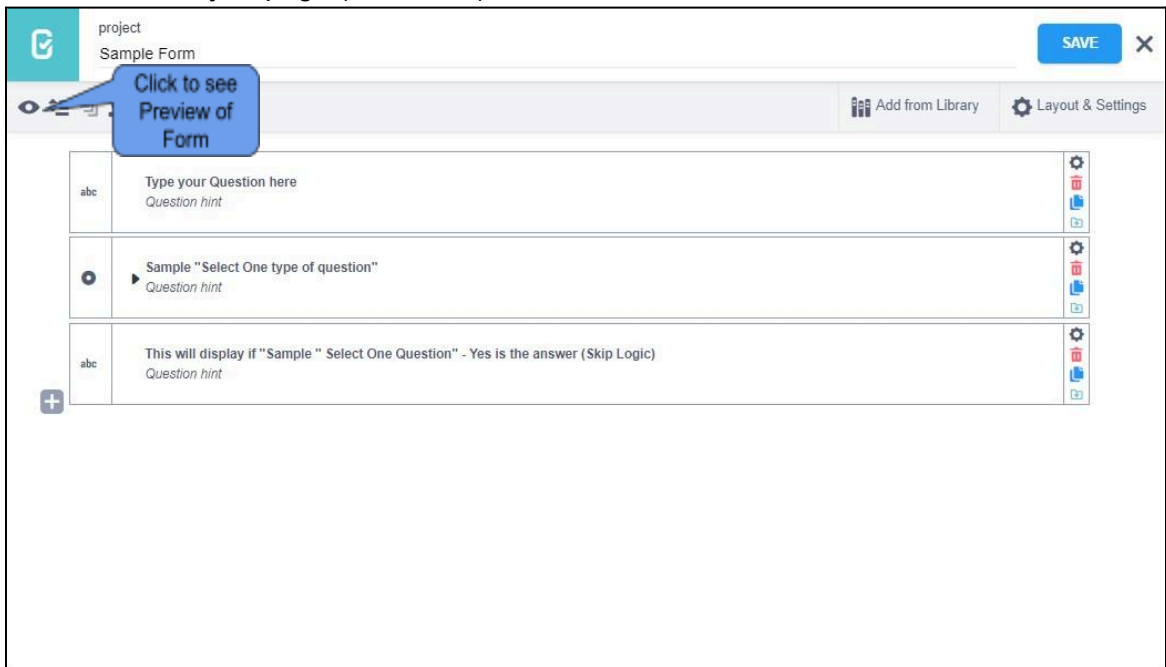
44. A Preview window of the Form will be displayed
45. It will give you a glimpse on how the form will be displayed once deployed as shown