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

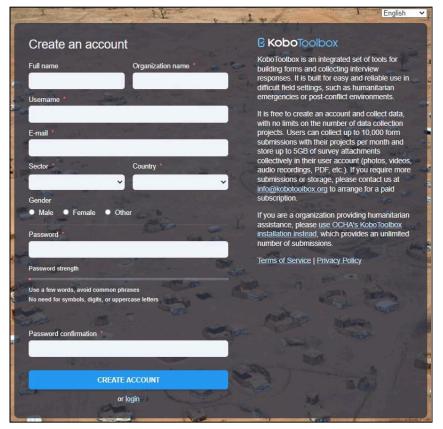
- 1. On your browser, go to this link : <u>http://www.kobotoolbox.org/</u>
- 2. Click "Create an account"



3. Select "Create an Account"

Sign in o	r create an account
	Global KoboToolbox Server
	Create an account Sign in Most people use our global KoboToolbox server. It is free for all to use to collect data for an unlimited number of projects. Our free community plan includes unlimited projects and unlimited data collectors / collaborators. You can collect up to 10,000 submissions per month and store up to 5GB in media attachments. Learn more about our user support and upgrade options. → If you work for a humanitarian organization, or your organization has its own KoboToolbox server, see the sign in instructions below for specialized KoboToolbox

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



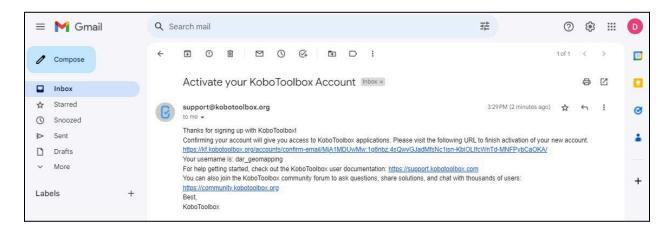
7. A link will be sent thru your email to activate you KoBoToolbox account



8. Open your email used in your registration,

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0	Compose	□• c :				1-1 of 1	<	>	
	Inbox 1	Primary	Promotions	ළ, Social					
☆	Starred	🔲 🚖 support	Activate your KoboToolbo	x Account - Thanks for signing u	p with KoboToolbo	x! Confir	3:29	PM	~
0	Snoozed								Ø
⊳	Sent								
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~	More								
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9. Select the email with subject entitled "support" and click the "link" to activate

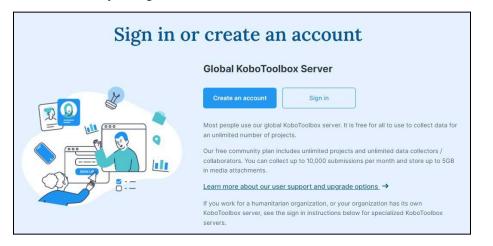


10. Click "CONFIRM"



Signing into KoboToolbox

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

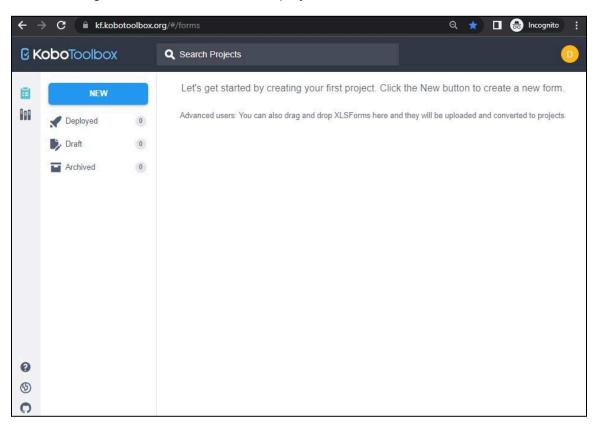


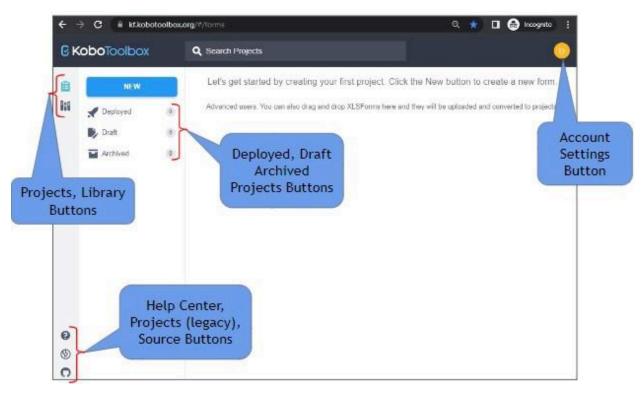
12. Log-in using your Username and password, then click "LOGIN"



Creating a Project from Scratch

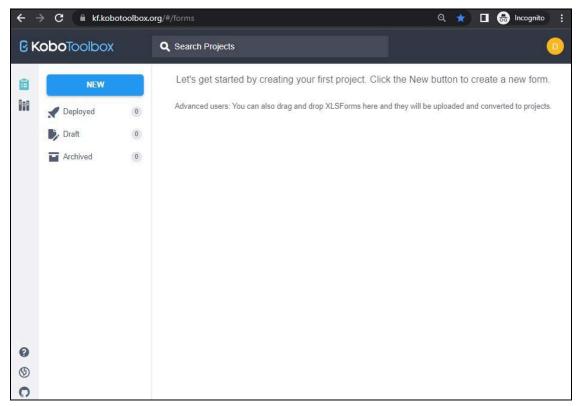
13. The Main Page in KoBotoolbox will be displayed as shown below





14. Familiarize with the User Interface of KoBoToolbox

- 15. Create Data Collection Form
- 16. Click "NEW"

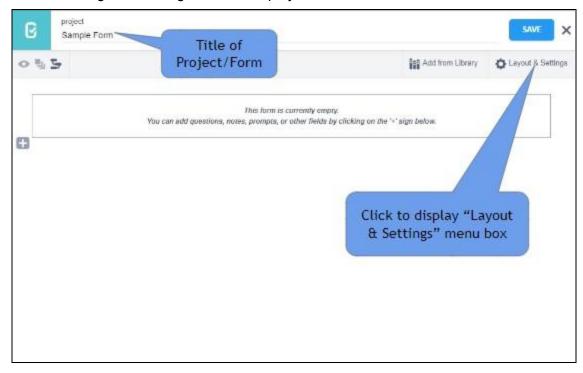


- 17. A menu of how to create the Project will be displayed
- 18. Select "Build from scratch"

Create projec	t Choose a source		
Choose one of th	e options below to continue. You will be	e prompted to enter name and other details in	further steps.
	Build from scratch	Use a template	
	Upload an XLSForm	C Import an XLSForm via URL	

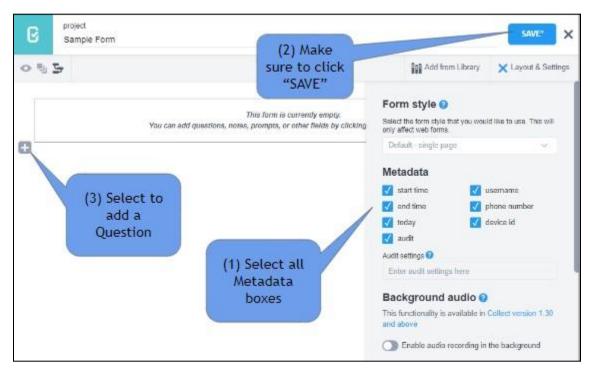
- 19. A Project Details Input window will appear
- 20. Encode all required fields to continue
- 21. On Sector, select "Others"
- 22. Click "Create Project"

Project Name (required)				
Enter title of project here	Name your Project (survey form), provide a brief			
Description		, provide a brief ption, choose the		
Enter short description here	Sect	tor and Country		
Sector (required)		Country (required)	Click to	
Select	~	Select	create a new Project	

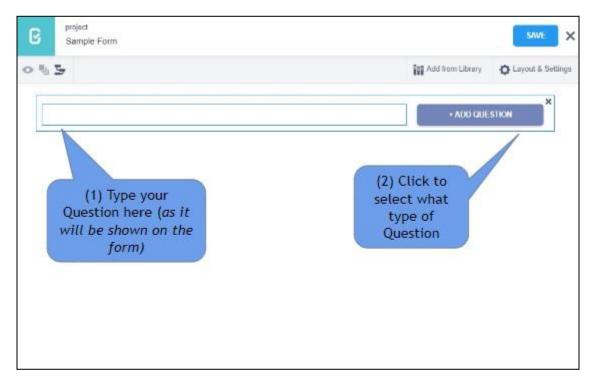


23. The Main Page in creating a form is displayed

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

			Add from Library	O Layout & Settin
				×
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1.0 Decimal	Date.	G Time	Date & time	
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Are.	≅ Rating	Guestion Matrix	1₹ Ranking	
1+1 Calculate	R Hidden	E File	1_1 Range	
External XML				
	Select "Text" ty of Question	pe		

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.

SAVE" X		project Sample Form	C
Library 🏟 Layout & Settings	Add from Library		• % 5
O di		Type your Question here Question had	ih:
h	Menu for each Question		Ð
	Settings	After choosing a question	
n	Delete Question	type, you will taken back to this main form.	
tion	Duplicate Question		
to Library	Add Question to 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.

95				Add from Library	O Layout & Settin
she	Type your Question here Question here	Sett	ings Menu		
Ø Sett	ings				X
smal the q mo	will appear in ler text below uestion to give re context or fification to a question	Guidance Hint: Mandatory Response: Default Response:	 Yes No Custom logic 	Column title for to this particular when data is ex an excel file. It	r question ported to should be
	Select "Yes" to make it	HXL: Appearance (Advanced):	Atag Ata	short and conc contain letters, and underso	numbers

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



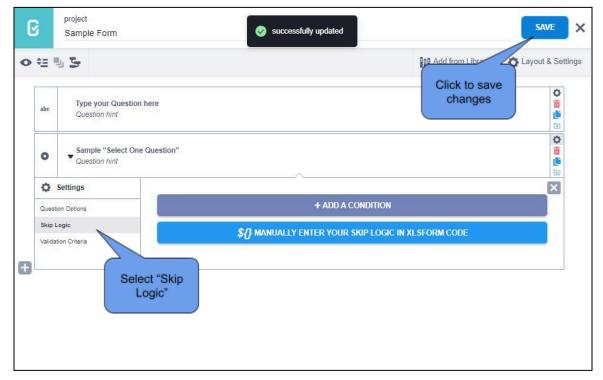
32. Select the "Select One" type.

5				Add from Library	-
					×
		/	<		
O Sele	ect One	Select Many	abc Text	123 Number	
1.0 Deci	imal 🏛	Date	C Time	Date & time	
• Poin	nt 💌	Photo	Audio	Video	
< Line	. =	Note	Barcode / QR Code	Acknowledge	
Area		Rating	Question Matrix	↓ ₽ Ranking	
1+1 Calc	culate 🛛 🕅	Hidden	File	11 Range	
Exte	rnal XML				

33. Enter all the possible answers as a choice to the question.

	•	2		Add from Library	🏠 Layout & Se
abc		Type your Question here Question hint			
0		Sample "Select One Question" Question hint			
	Ō	Yes		XML value:	AUTOMATIC
	Ō	No		XML value:	AUTOMATIC
	Ō	Undecided		XML value:	AUTOMATIC
		+ Click to add another response	Type the Answer (label) for each of the choices here	XML value:	AUTOMATIC

- 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.

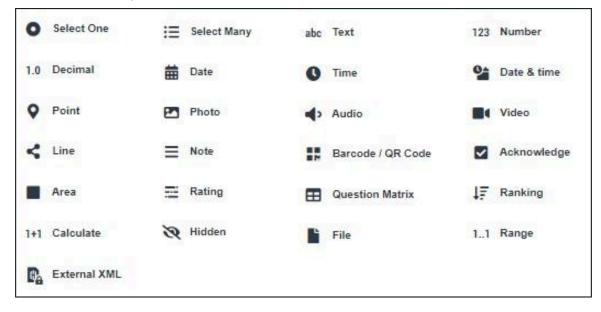
¢ <u>⊒</u> !	4 5	bA as	from Library 🏠 Layout & Setting
-			
abc	Type your Question Question hint	on here	
0	Sample "Select O Question hint	ne Question"	
¢	Settings		×
Questi	ion Options	This question will only be displayed if the following conditions apply	
Skip L	ogic	Select question from list	Î
Validat	tion Criteria	Select question from list	
		Type your Question here	
		Select your	
		reference	

- 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

¢≞	9. 5		Add from Library	Cayout & Settin
abc	Type your Questio Question hint	n here		
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Ques	stion Options	This question will only be displayed if the following conditions apply		
Skip	Logic	Type your Question here	Was Answered	Î
Valida	lation Criteria	+ ADD ANOTHER CONDITION	Was Answered Was not Answered (=) not (!=)	
	Click to anot condi	her		Select the condition

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	11	Range input (including rating).
text	abc	Free text response.
select_one [options]	0	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]	0	Multiple choice from file; only one answer can be selected.
select_multiple_from_file [file]	iΞ	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 Q		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	曲	Date input.
time	G	Time input.
dateTime	9	Accepts a date and a time input.
image	2	Take a picture or upload an image file.
audio	•	Take an audio recording or upload an audio file.
background-audio	Ξ.	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	8	A field with no associated UI element which can be used to store a constant.



41. List of Question Types in KoboToolbox

42. Description for each question type

Select One

Select One

This question type allows you to create a multiplechoice 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

E 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

abc 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.

123 Number

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

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.

① 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.

On 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.

9 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.

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.

Photo

Photo

≡ Note

Note

specifically for

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.

Similar to a text field, but

respondents to make a

particular question may

information, it could be

note of something.

For example, if a

require additional

followed by a note.

Audio

Audio This allows a respondent

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.

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.

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

File

Question Matrix

Question Matrix

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

1..1 Range

ns

<u>Calculate</u> This is an advanced

method of performing calculations on responses to questions answered in your form if needed prior to data export. This method is used to enter a generic file (txt, pdf, xis, xisx, doc, docx, rtf, zip)

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)

€ ●¥		i torton of	Add from Library	SAVE X
	abc	Type your Question here Question hint		
	0	Sample "Select One type of question" Question hint		
-	abc	This will display if "Sample " Select One Question" - Yes is the answer (Skip Logic) Question hint		
Ð				
6				

17 Ranking

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

- 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

Form Preview	×
Sample Form	*
Type your Question here	
Sample "Select One type of question" Yes No Undecided	
Validate Click to validate entries Powered by ENK	10 -