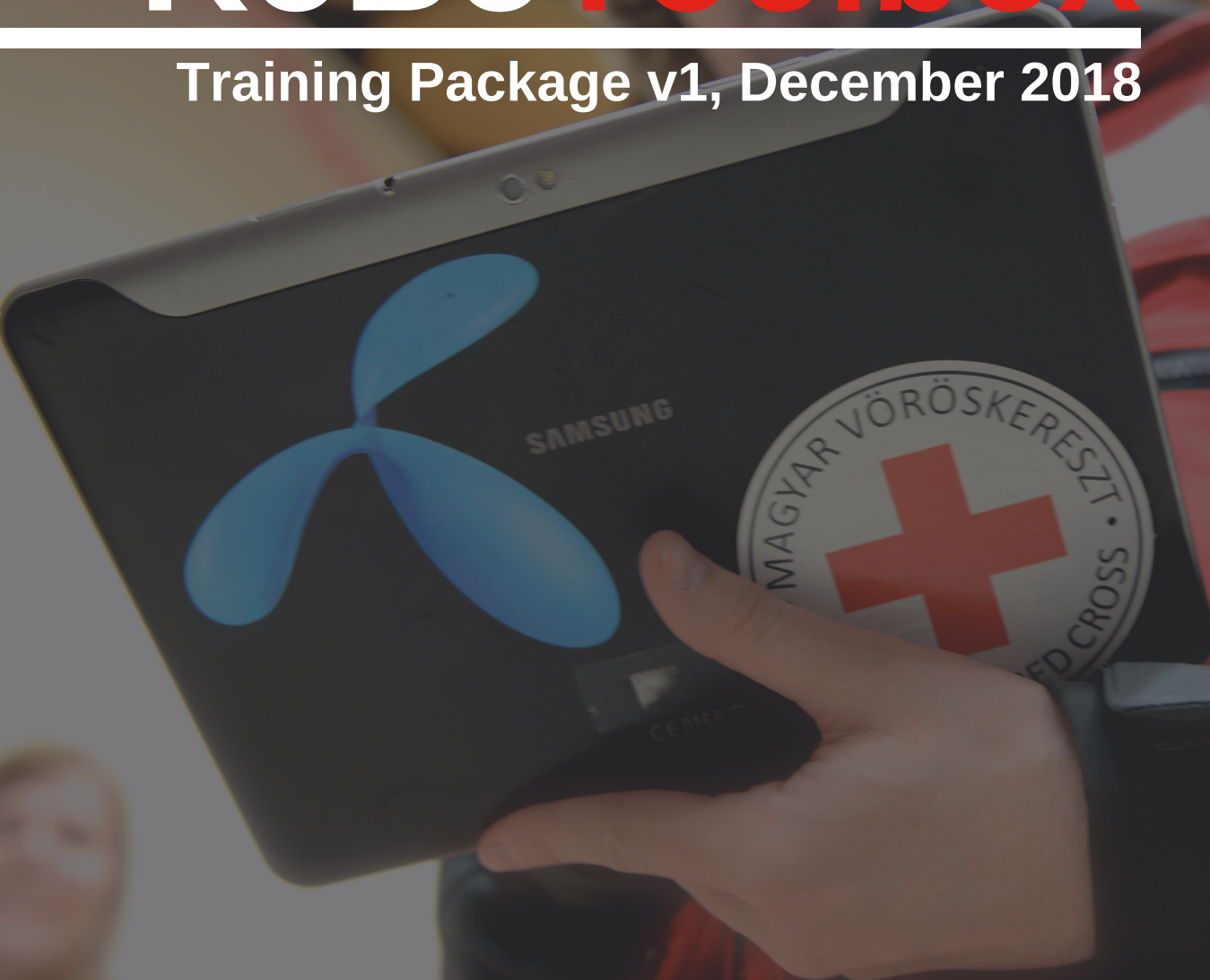


KoBoToolbox

Training Package v1, December 2018



INTERNATIONAL



FEDERATION

What is KoBoToolbox ?

- KoBo Toolbox is a free open-source tool for mobile data collection.
- It allows to collect data in the field using mobile devices such as mobile phones or tablets, as well as with paper or computers.
- There are two separate instances of KoBoToolbox for humanitarians and other users:
kobo.humanitarianresponse.info and **kf.kobotoolbox.org**
- The adaptation of KoBo Toolbox for humanitarian use was a joint initiative between OCHA, Harvard Humanitarian Initiative (HHI) and the International Rescue Committee (IRC).

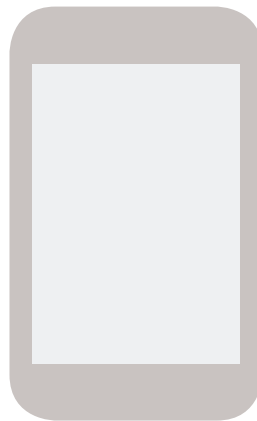
Why KoBo ?

- **It is a ready-to-use all-in-one platform** for developing, storing, managing and sharing forms, as well as managing and sharing collected data.
- **It is based on OpenDataKit (ODK).** KoBo Toolbox is fully compatible and interchangeable with ODK Collect and XLSForm, but delivers more functionality such as an easy-to-use formbuilder, question libraries and integrated data management. It also integrates other open-source ODK-based developments such as formhub and Enketo.
- **It is being continuously improved and optimised** particularly for the use of humanitarian actors in emergencies and difficult field environments, in support of needs assessments, monitoring and other data collection activities.
- **It is free.** All humanitarian actors can create accounts on the dedicated server and use them without limitations on data or time. There is no need to install any server, but if there is a need, organisations can install it on their own servers.

KoBo supports the full data collection cycle



form design



data
collection



analysis

Currently available features

Form builder

The form builder is fully compatible with XLSForms, allowing a flexible interchange between the formats at any stage of form design, and a seamless transfer of previously designed XLSForms into KoBo Toolbox.

Question library

The form builder integrates a question library, which allows prepared questions to be rapidly identified and inserted into a form as it is designed.

Android- or browser-based data collection

Data collection via both methods is fully supported offline as well as online.

Data submission

When offline, data is stored locally on both the app or browser, and then submitted directly to the server whenever an internet connection becomes available.

Currently available features

Data management

The Toolbox allows aggregation, editing and annotation of the data directly within the platform, as well as mapping of geo-referenced data and photo display. The API allows dynamic and automated interaction with the data, including its seamless integration into other databases or websites.

Data download

Data can be downloaded in a number of formats - XLS, CSV, JSON, and KML (if GPS data was collected), ready for analysis in Excel, SPSS, or other statistical packages.

Data analysis in Excel

The KoBoToolbox Excel Data Analyser facilitates analysis of survey responses.

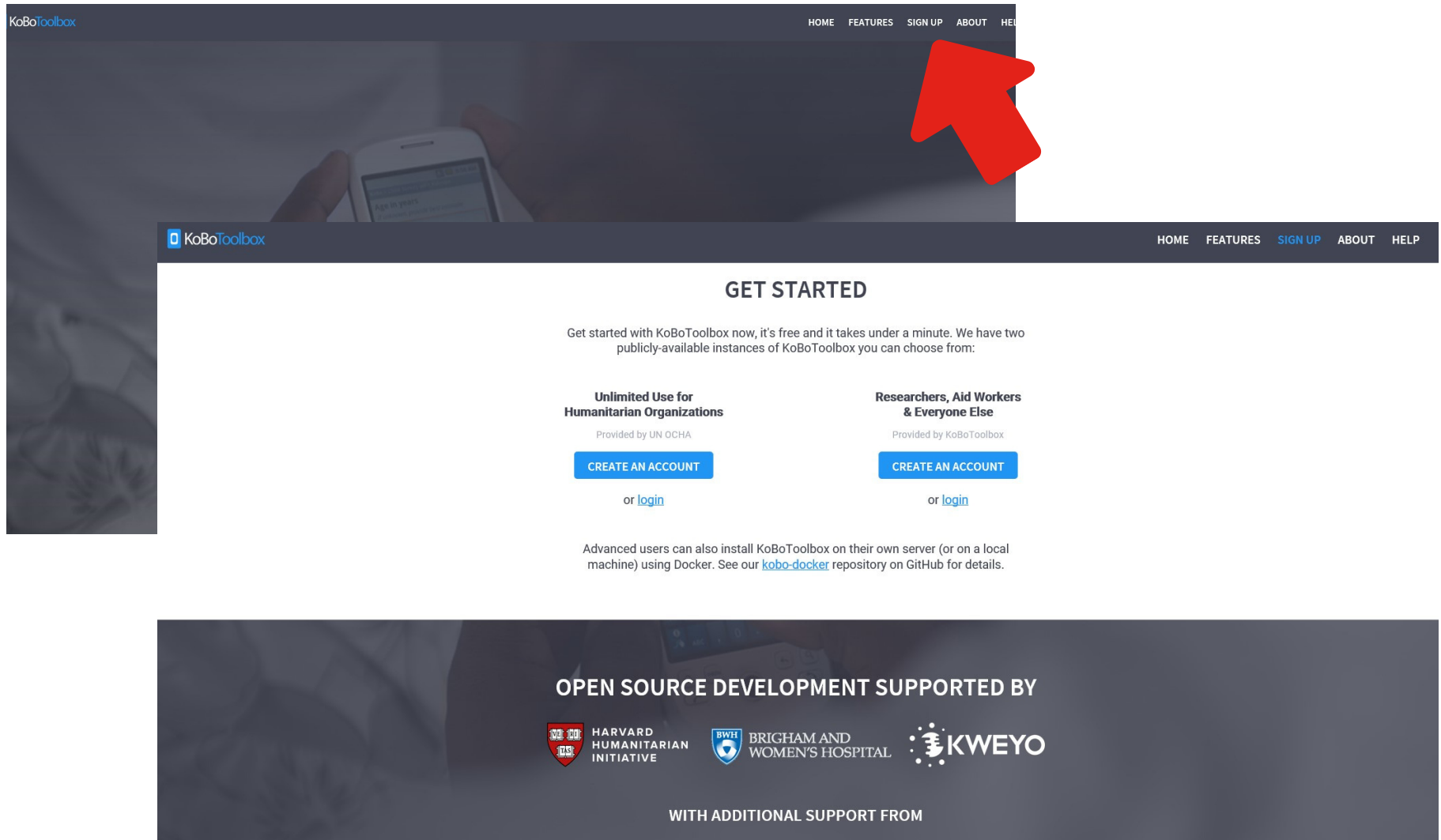
Can be downloaded [HERE](#).

User access control

Users create separate accounts and their forms and data are inaccessible to other users and system administrators. Forms and project data can be shared with other users with multiple permission options.

Get Started

www.kobotoolbox.org



The screenshot displays the KoBoToolbox website. The top navigation bar includes links for HOME, FEATURES, SIGN UP, ABOUT, and HELP. A red arrow points to the 'SIGN UP' link. The main content area is titled 'GET STARTED' and contains the following text:

Get started with KoBoToolbox now, it's free and it takes under a minute. We have two publicly-available instances of KoBoToolbox you can choose from:

Unlimited Use for Humanitarian Organizations Provided by UN OCHA CREATE AN ACCOUNT or login	Researchers, Aid Workers & Everyone Else Provided by KoBoToolbox CREATE AN ACCOUNT or login
---	---

Advanced users can also install KoBoToolbox on their own server (or on a local machine) using Docker. See our [kobo-docker](#) repository on GitHub for details.

At the bottom, a section titled 'OPEN SOURCE DEVELOPMENT SUPPORTED BY' features logos for the Harvard Humanitarian Initiative, Brigham and Women's Hospital, and Kweyo. Below this, it says 'WITH ADDITIONAL SUPPORT FROM'.

Landing page

The screenshot displays the KoBoToolbox landing page. The main interface features a dark header with the KoBoToolbox logo, a search bar, and a user profile icon. A sidebar on the left contains navigation icons and a 'NEW' button. The main content area shows a table of projects with columns for Name, Shared by, Created, Last Modified, and Submissions. A modal window is overlaid on the main content, showing a detailed view of a project with a 'NEW' button and a list of project items.

KoBoToolbox Search Projects

NEW

Deployed

Name	Shared by	Created	Last Modified	Submissions
ERU_readiness		Yesterday at 9:38 AM	Today at 9:06 AM	1
IFRC_initial_assessment_tool		Last Monday at 9:47 AM	Last Monday at 9:47 AM	0
Surge Co				

Draft

Name
Core Competency Framework

KoBoToolbox Search Projects

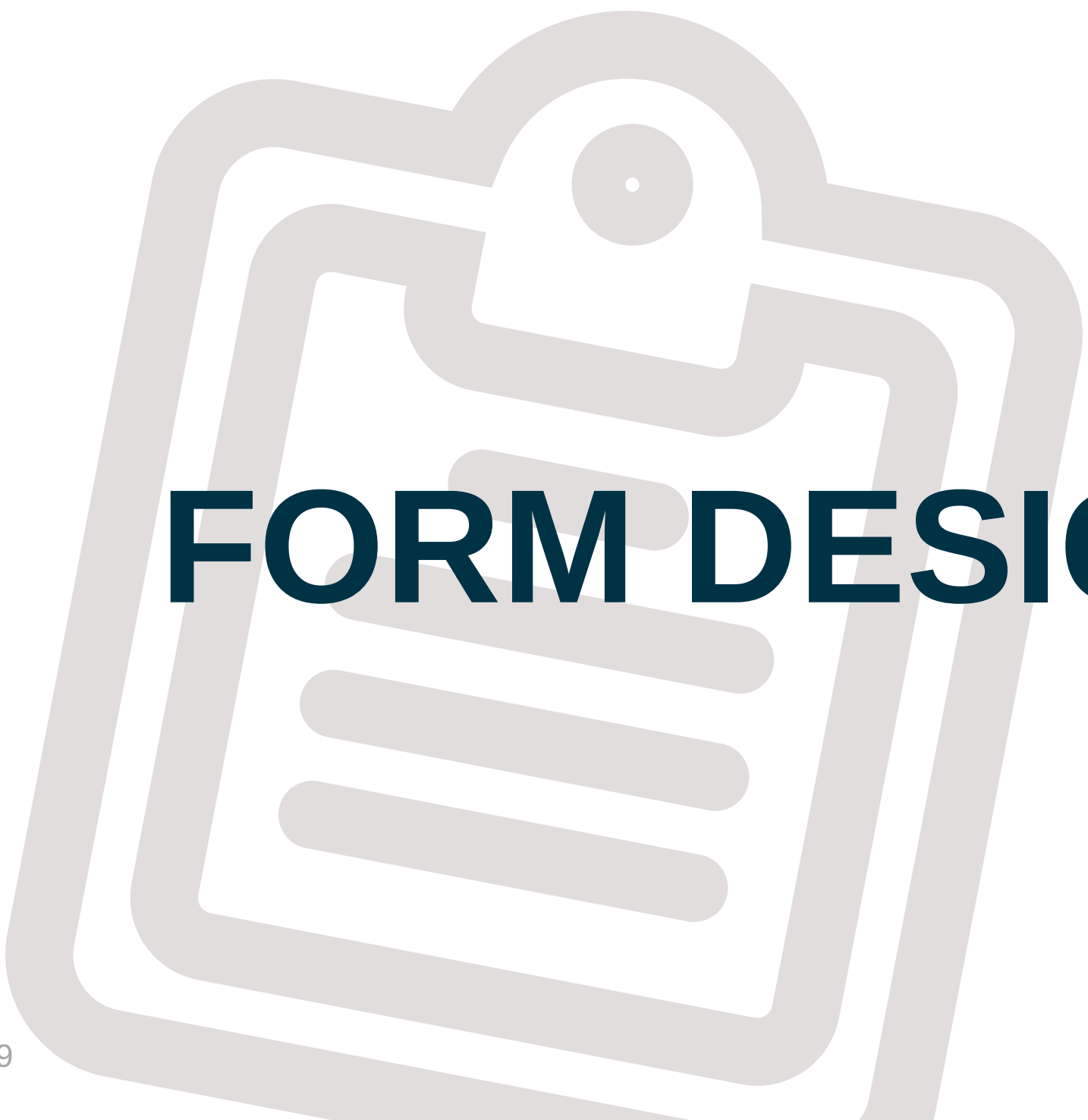
NEW

Deployed

Name
ERU_readiness
IFRC_initial_assessment_t
Surge Core Competencies

Draft

Name
Core Competency Framework



FORM DESIGN

Creating a form

Create project: Choose a source

Choose one of the options below to continue. You will be prompted to enter name and other details in further steps.



Build from scratch



Use a template



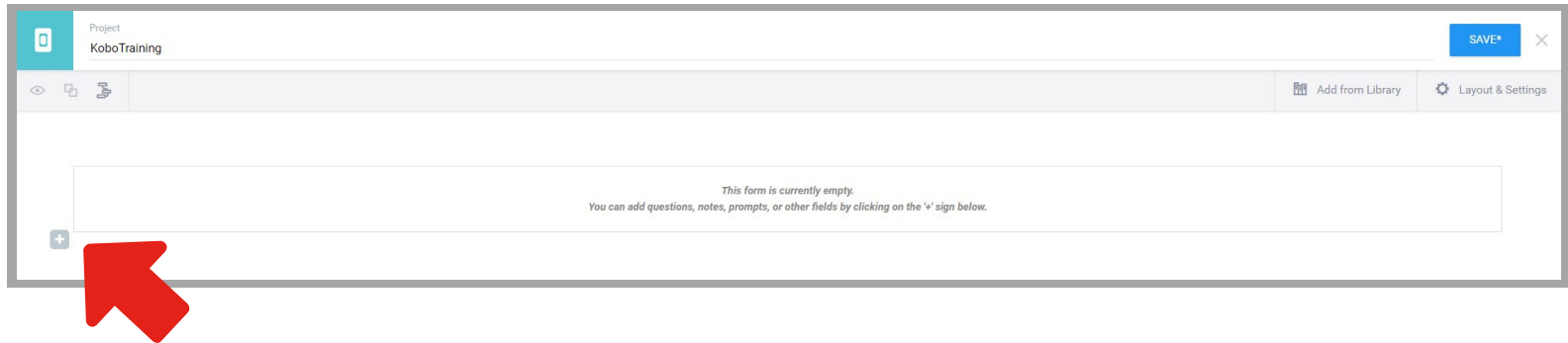
Upload an XLSForm



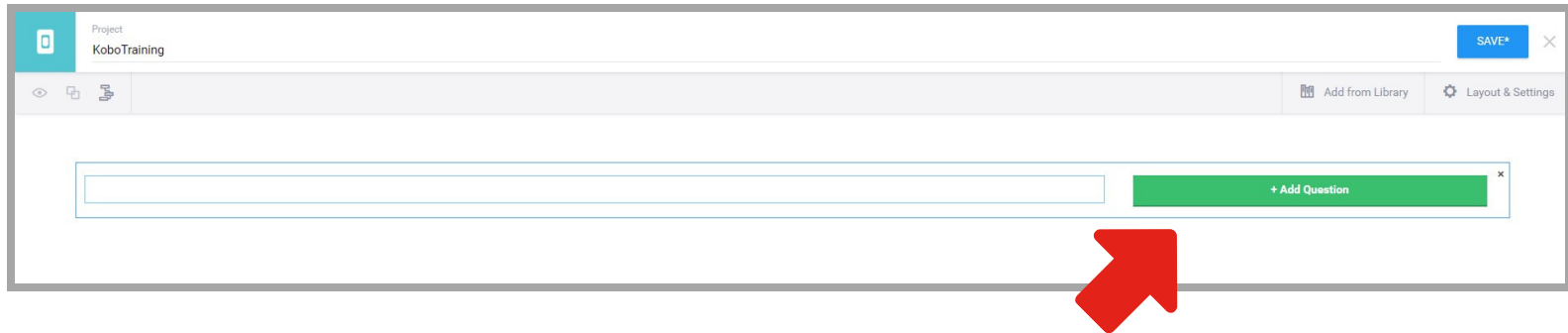
Import an XLSForm via URL

Using the form builder

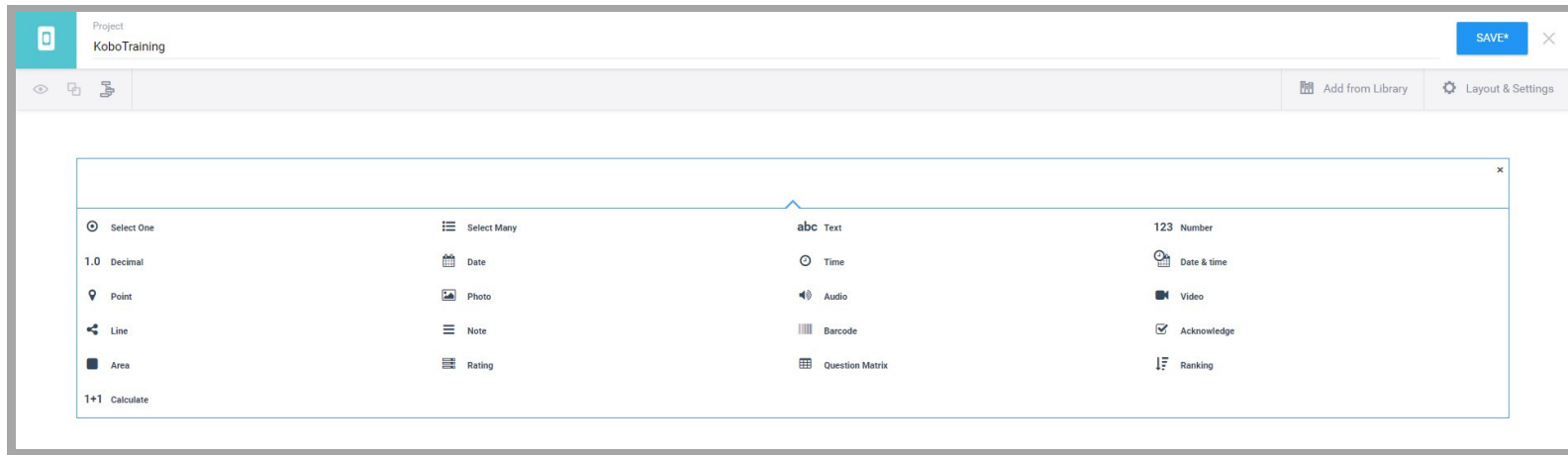
1.



2.



3.



Question Types

	Select One	Multiple choice question; only one answer can be selected.		Date	Date input.
	Select Many	Multiple choice question; multiple answers can be selected.		Time	Time input.
	Text	Free text response.		Date & time	Accepts a date and a time input.
	Number	Whole number input.		Photo	Take a picture or upload an image file.
	Decimal	Decimal input.		Audio	Take an audio recording or upload an audio file.
	Note	Display a note on the screen, takes no input.		Video	Take a video recording or upload a video file.

Question Types



Acknowledge

Acknowledge prompt that sets value to “OK” if selected.



Rating



Point

Collect a single GPS coordinate.



Question Matrix



Line

Record a line of two or more GPS coordinates.



Ranking



Area

Record a polygon of multiple GPS coordinates; the last point is the same as the first point.



Barcode

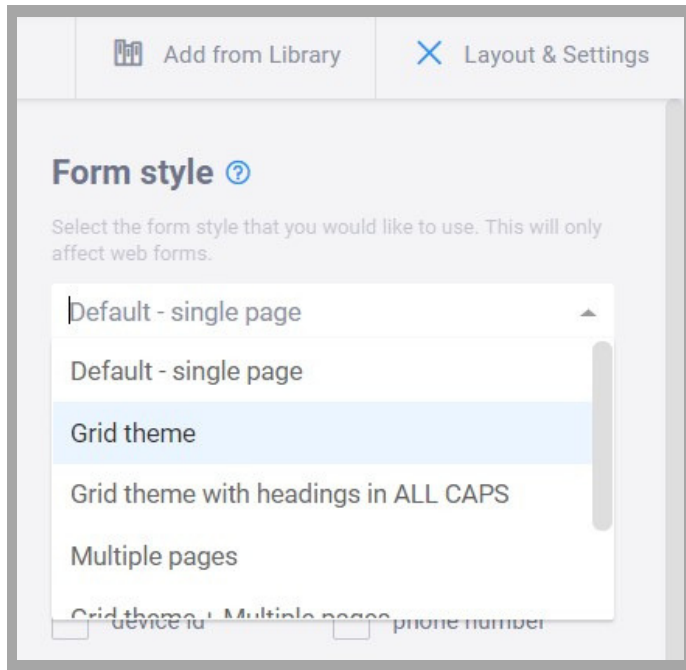
Scan a barcode, requires the barcode scanner app to be installed.



Calculate

Perform a calculation

Form style



Form style works only with Enketo Webforms, more information can be found [HERE](#).

Default - single page

Grid theme

Grid theme with headings in ALL CAPS

Multiple pages

Grid theme + Multiple pages

Grid theme + Multiple pages
+ headings in ALL CAPS

Form style

* Name of disaster

* Date

* Enumerator, Name and Family Name

* Geographical area name

* Setting
☐ urban
☐ rural
☐ semi urban

* number of people before the disaster

* number of people who have left the area

* number of people who have returned

* number of people currently living in the area

* number of people affected (SUM)

* number of people displaced

* number of affected non-displaced

* number of casualties

Do you have a situation of concern in the one or more of the following sectors?

* Health

Default - single page

Grid theme

Grid theme with headings in ALL CAPS

Multiple pages

Grid theme + Multiple pages

Grid theme + Multiple pages
+ headings in ALL CAPS

Form style

NAME OF DISASTER	*
DATE yyyy-mm-dd	* 
ENUMERATOR, NAME AND FAMILY NAME	*
GEOGRAPHICAL AREA NAME	*
SETTING ☐ urban ☐ rural ☐ semi urban	*
NUMBER OF PEOPLE BEFORE THE DISASTER	*
NUMBER OF PEOPLE WHO HAVE LEFT THE AREA	*
NUMBER OF PEOPLE WHO HAVE RETURNED	*
NUMBER OF PEOPLE CURRENTLY LIVING IN THE AREA	*
NUMBER OF PEOPLE AFFECTED (SUM)	*
NUMBER OF PEOPLE DISPLACED	*
NUMBER OF AFFECTED NON-DISPLACED	*
NUMBER OF CASUALTIES	*
DO YOU HAVE A SITUATION OF CONCERN IN THE ONE OR MORE OF THE FOLLOWING SECTORS?	
HEALTH ☐ Yes ☐ No	*
FOOD ☐ Yes ☐ No	*
WASH	*

Default - single page

Grid theme

Grid theme with headings in ALL CAPS

Multiple pages

Grid theme + Multiple pages

Grid theme + Multiple pages
+ headings in ALL CAPS

Form style

Default - single page

Grid theme

Grid theme with headings in ALL CAPS

Multiple pages

Grid theme + Multiple pages

Grid theme + Multiple pages
+ headings in ALL CAPS



The screenshot shows a web form interface within a KoBoToolbox window. The form is titled "IFRC_initial_assessment_tool". It features a single text input field labeled "* Name of disaster". Below the input field is a blue "Next" button. At the bottom of the form, there are two navigation links: "Return to Beginning" with a left arrow icon and "Go to End" with a right arrow icon. The KoBoToolbox logo is in the top left corner, and a printer icon and a menu icon are in the top right corner. The text "Powered by ENKETO" is visible at the bottom right of the form area.

Metadata

Select the form style that you would like to use. This will only affect web forms.

Default - single page ▼

Metadata

☒ start time	☐ username
☒ end time	☐ sim serial
☐ today	☐ subscriber id
☐ device id	☐ phone number

Details

Description

Enter short description here

Please specify the country and the sector where this project will be deployed.

Sector

Select... ▼

Country

Select... ▼

☐ Help KoboToolbox improve this product by sharing the sector and country where this project will be deployed. All the information is submitted anonymously, and will not include the project name or description listed above.

start time

Start date and time of the survey.

end time

End date and time of the survey.

today

Day of the survey.

device id

IMEI (International Mobile Equipment Identity)

username

Username configured (if available).

sim serial

SIM serial number.

subscriber id

IMSI (International Mobile Subscriber Identity)

phone number

Phone number (if available).



These will not appear among the questions on the form, but you will see them when viewing your submitted survey data.

Question Options

The Name is the unique identifier (ID) of each question.

This field is mandatory and only letters, numbers, and underscores are allowed

Hints are help texts that will be displayed underneath your questions on the form.

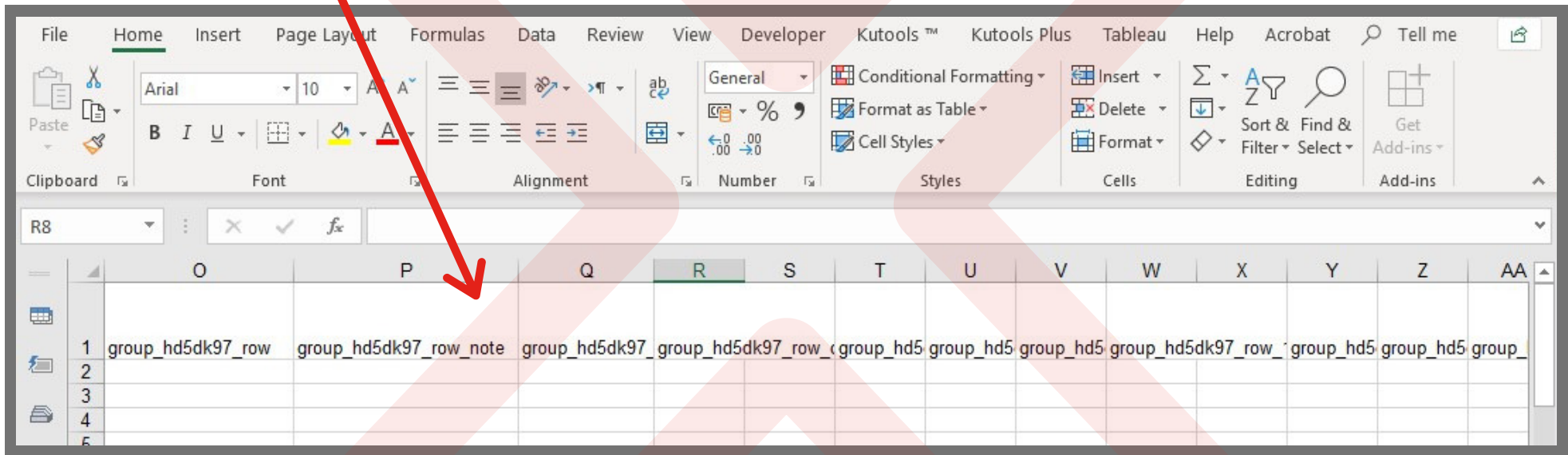
It is optional and is used to provide additional instructions to your enumerator

The screenshot shows a web interface for configuring a question. On the left is a sidebar with a 'Settings' menu containing 'Question Options', 'Skip Logic', and 'Validation Criteria'. The main area is titled 'abc * Name of disaster'. It contains several configuration fields: 'Data Column Name' with the value 'name', 'Question Hint' (empty), 'Mandatory Response' set to 'Yes' with a checked checkbox, 'Default Response' (empty), 'HXL' with a '#tag' input and an 'Attributes' button, and 'Appearance (Advanced)' with a 'select' dropdown. Two red arrows originate from the explanatory text above: one points to the 'Data Column Name' field, and the other points to the 'Question Hint' field.

abc	* Name of disaster
Settings	
Question Options	
Skip Logic	
Validation Criteria	
Data Column Name:	name
Question Hint:	
Mandatory Response:	☒ Yes
Default Response:	
HXL:	#tag Attributes
Appearance (Advanced):	select ▼

Question Options

**PLEASE DO NOT DO
IT TO YOURSELF**



OR YOUR ANALYST !

Question Options

If a question is required, the interviewer needs to provide an answer in order to finalize the form.

The screenshot shows the 'Question Options' settings for a question with the label 'abc' and the text '* Name of disaster'. The settings are as follows:

- Data Column Name:** name
- Question Hint:** (empty text box)
- Mandatory Response:** ☒ Yes
- Default Response:** (empty text box)
- XML:** #tag (Attributes)
- Appearance (Advanced):** select (dropdown menu)

This allows specifying a default response that the interviewer can accept or change.

It is not recommended as it might create an accidental bias.

Question Options

The screenshot shows a form for configuring a question. It includes fields for 'Data Column Name' (set to 'name'), 'Question Hint', 'Mandatory Response' (checked 'Yes'), 'Default Response', and 'HXL' (set to '#tag' and 'Attributes'). The 'Appearance (Advanced)' dropdown menu is open, showing options: 'select', 'select', 'multiline', 'numbers', and 'other'. A red arrow points to the 'multiline' option.

This advanced setting allows displaying the question in a modified way.

Appearance options are dependent on the type of question, for example a select-one question has different appearances than a text-question.

multiline

Best if used with web clients, makes the text box multiple lines long.

minimal

Answer choices appear in a pull-down menu.

quick

Relevant for mobile clients only, this attribute auto-advances the form to the next question after an answer is selected.

field-list

Entire group of questions appear on one screen (for mobile clients only).

compact

Displays answer choices side by side with minimal padding and without radio buttons or checkboxes. Particularly useful with image choices.

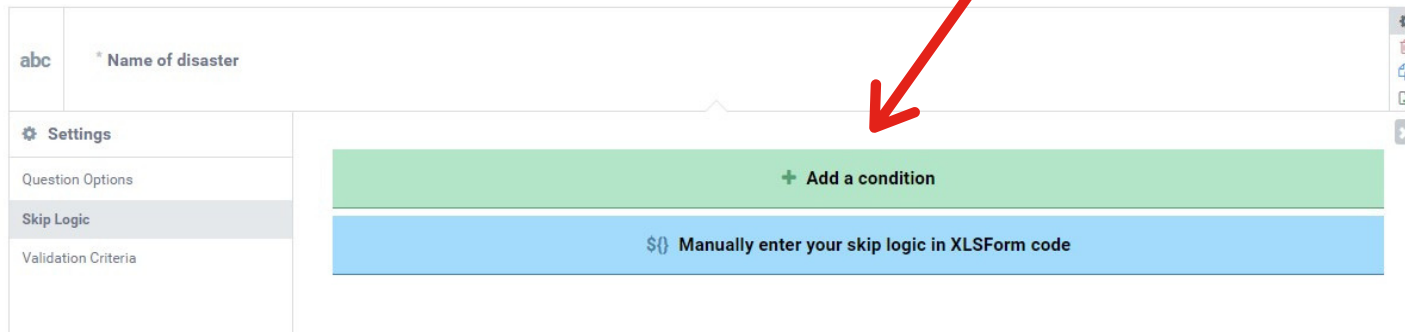
likert

Best if used with web clients, makes the answer choices appear as a Likert scale.

An XLSForm with all of the appearance attributes in this table is available [HERE](#).

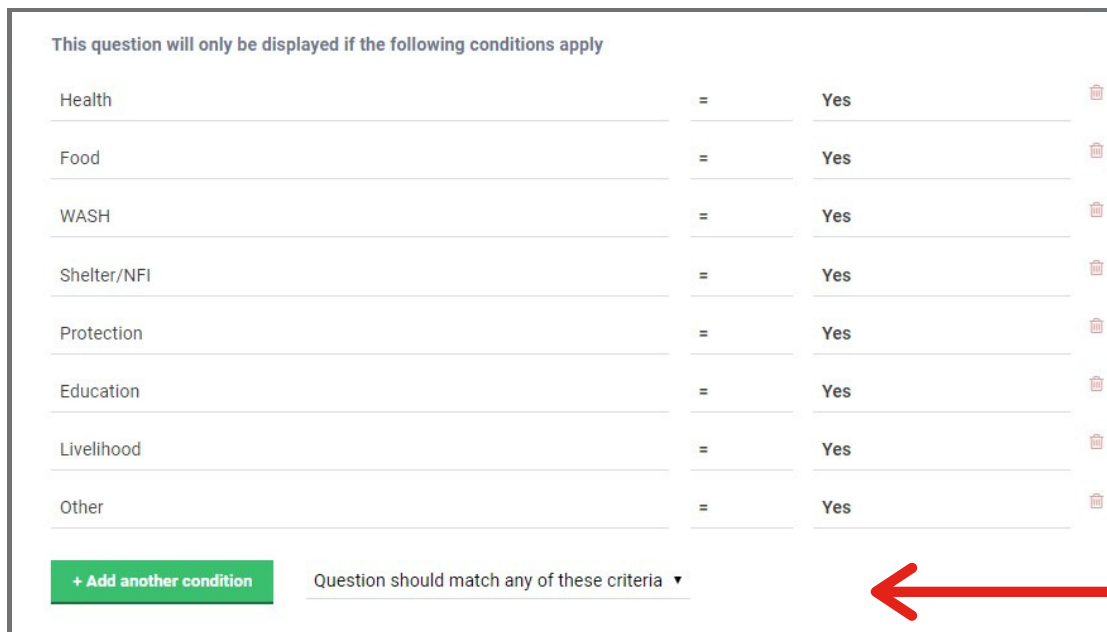
Skip Logic

Skip logic controls which question should be displayed only if a certain condition is (or multiple conditions are) fulfilled.



The screenshot shows the 'Skip Logic' settings for a question group. On the left is a sidebar with 'Settings', 'Question Options', 'Skip Logic' (selected), and 'Validation Criteria'. The main area has a green bar with '+ Add a condition' and a blue bar with '\${} Manually enter your skip logic in XLSForm code'. A red arrow points to the green bar.

Conditions are always applied to the question or group that should be sometimes hidden, sometimes visible.



The screenshot shows a table of conditions for a question. The title is 'This question will only be displayed if the following conditions apply'. The table has three columns: a criterion, an operator, and a value. The criteria listed are Health, Food, WASH, Shelter/NFI, Protection, Education, Livelihood, and Other, all with the operator '=' and value 'Yes'. At the bottom, there is a green button '+ Add another condition' and a dropdown menu 'Question should match any of these criteria' with a red arrow pointing to it.

Criterion	Operator	Value
Health	=	Yes
Food	=	Yes
WASH	=	Yes
Shelter/NFI	=	Yes
Protection	=	Yes
Education	=	Yes
Livelihood	=	Yes
Other	=	Yes

When using **two or more conditions**, be sure to choose between the two options whether the question should match any (**at least one**) of these criteria, OR **all of them**.

Validation Criteria

Constraints

The screenshot shows a user interface for configuring validation criteria. On the left is a sidebar with a 'Settings' section containing 'Question Options', 'Skip Logic', and 'Validation Criteria' (which is selected). The main area has a header 'abc * Name of disaster'. Below this is a green bar with a '+ Add a condition' button. Underneath is a blue bar with a code icon and the text 'Manually enter your validation logic in XLSForm code'. At the bottom is an 'Error Message:' label followed by a text input field. Two red arrows point to the blue bar and the error message field.

This feature allows you to avoid accidental or invalid answers, especially in numeric questions (Integer or Decimal response types). However, validation can be used on any question.

It is a very useful feature, as it saves time on data cleaning.

for example, you can restrict a question about age to numbers between 0 and 120

For more information on validation criteria go [HERE](#)

Optional message an enumerators will see when they enter an invalid response.

Golden Rule

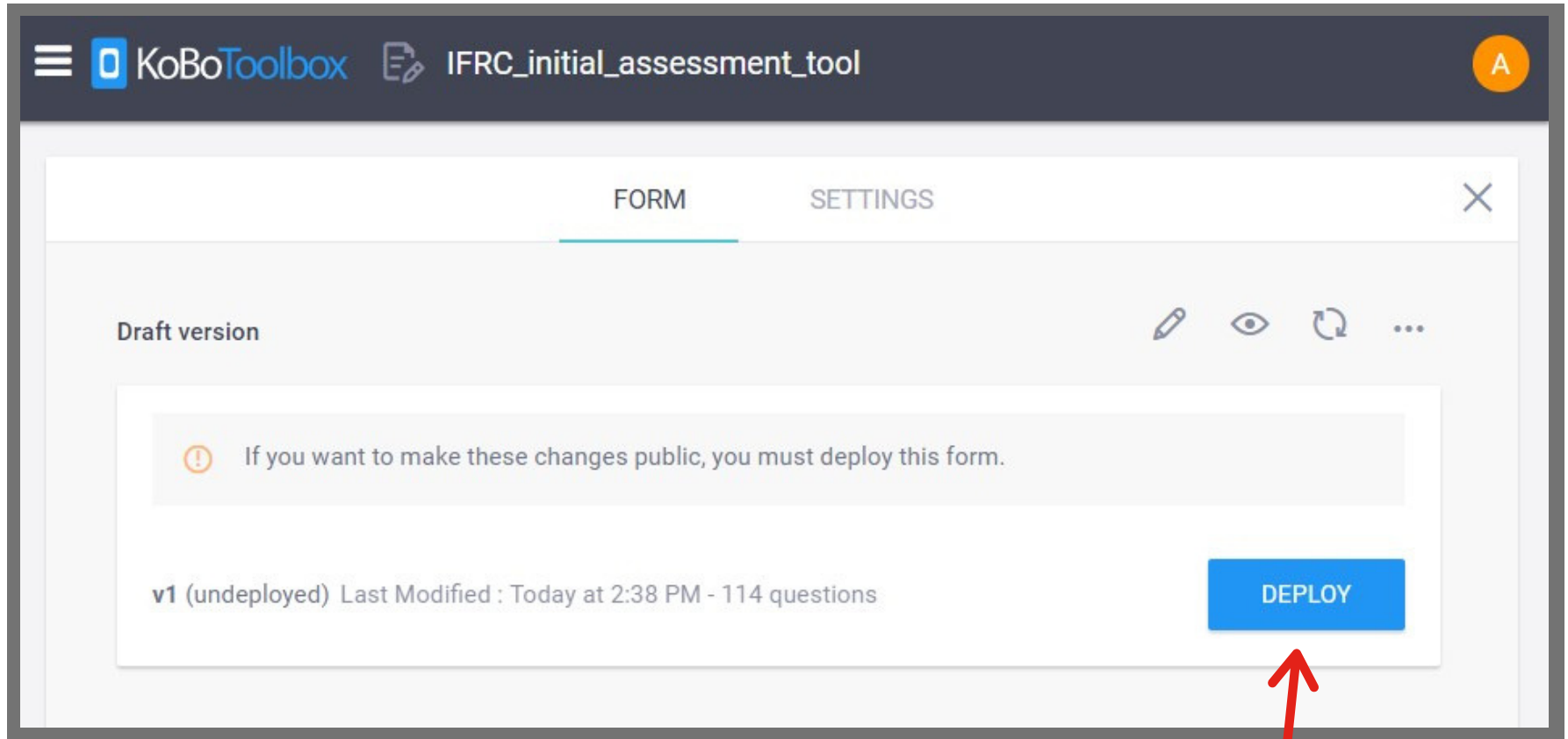
of Survey Design

**TIME SPENT ON
QUESTIONNAIRE DESIGN**

= 4x

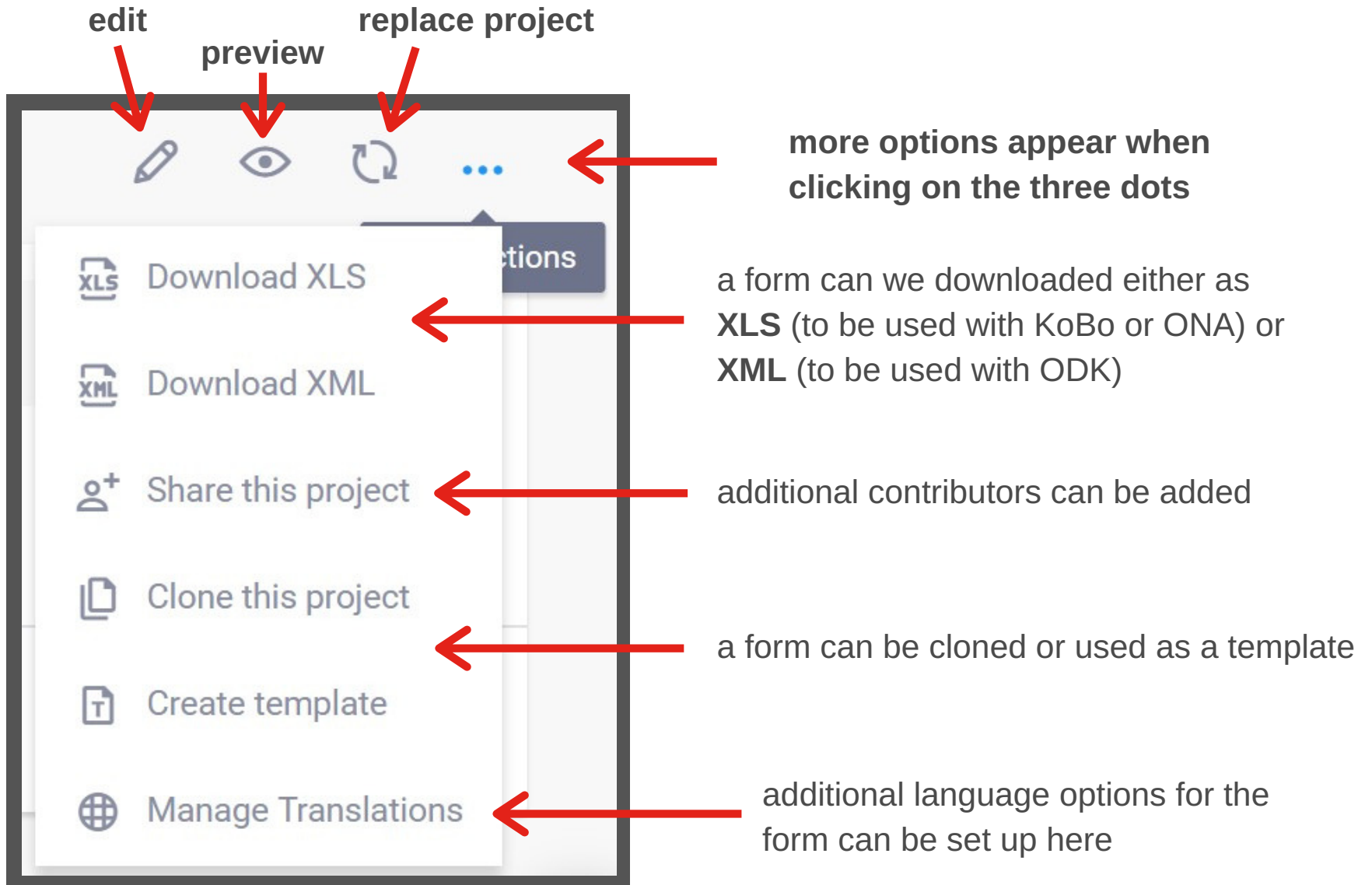
**TIME SAVED
ON DATA
CLEANING &
ANALYSIS**

Deploying a Form



Once **DEPLOY** button is clicked, a form will be live and data collection can begin.

Form Management



The screenshot shows the Form Management interface. At the top, there are four icons: a pencil (edit), an eye (preview), a circular arrow (replace project), and three dots (more options). Red arrows point from text labels to each of these icons. The 'more options' menu is open, showing a list of actions: 'Download XLS', 'Download XML', 'Share this project', 'Clone this project', 'Create template', and 'Manage Translations'. Red arrows point from text labels to each of these menu items. The labels and arrows are as follows:

- edit** (points to the pencil icon)
- preview** (points to the eye icon)
- replace project** (points to the circular arrow icon)
- more options appear when clicking on the three dots** (points to the three dots icon)
- a form can be downloaded either as XLS (to be used with KoBo or ONA) or XML (to be used with ODK)** (points to the 'Download XLS' and 'Download XML' items)
- additional contributors can be added** (points to the 'Share this project' item)
- a form can be cloned or used as a template** (points to the 'Clone this project' and 'Create template' items)
- additional language options for the form can be set up here** (points to the 'Manage Translations' item)

Editing a Form

KoBoToolbox IFRC_initial_assessment_tool 0 submissions

NEW

Deployed 4

Draft 1

Archived 0

SUMMARY FORM SETTINGS

Current version

If you want to make these changes public, you must deploy this form.

v2 (undeployed) Last Modified : Last Thursday at 10:41 AM - 114 questions

edit

REDEPLOY

Collect data

Online-Offline (multiple submission)

COPY OPEN

This allows online and offline submissions and is the best option for collecting data in the field.

KoBoToolbox Search Projects

NEW

Deployed

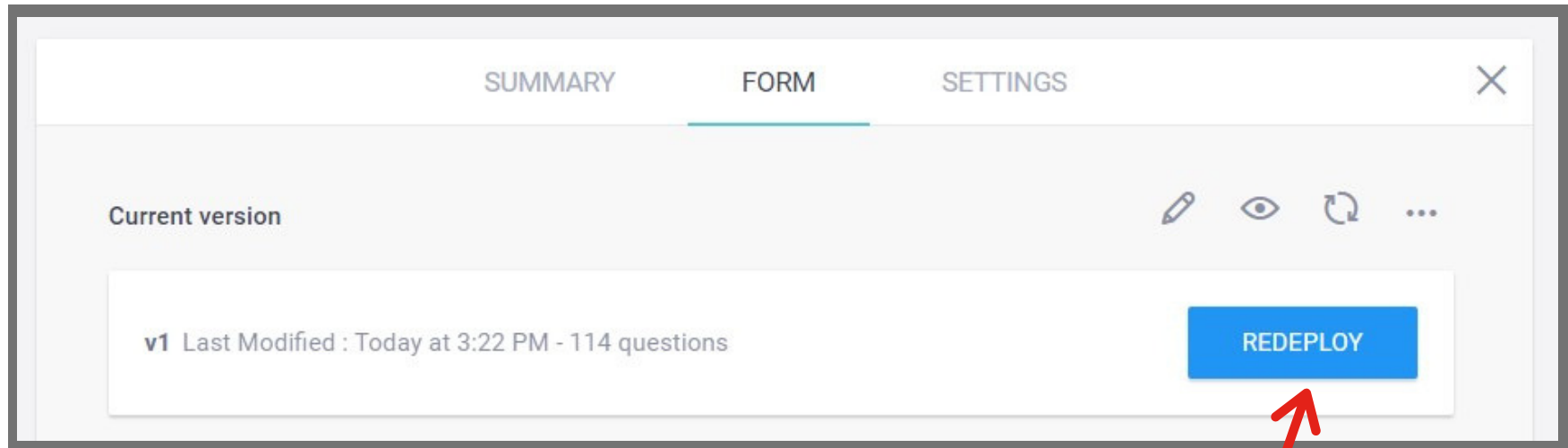
Name	Shared by	Created	Last Modified	Submissions
IFRC_initial_assessment_tool		October 29, 2018	Last Thursday at 10:45 AM	1
IFRC_initial_assessment_tool		November 7, 2018	Last Thursday at 10:45 AM	1
ERU_readiness		November 1, 2018	November 2, 2018	2
Surge Core Competencies Self Assessment Tool		October 1, 2018	October 2, 2018	1

Draft

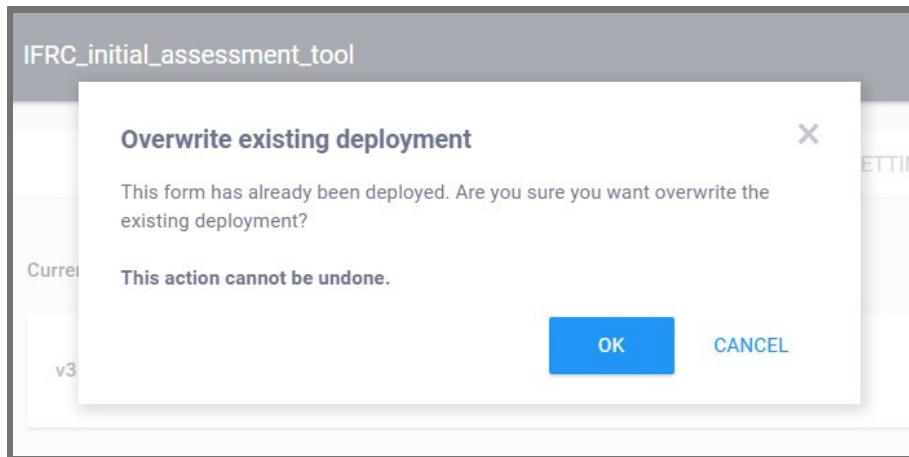
Name	Shared by	Created	Last Modified	Submissions
Core Competency Framework Self Assessment		August 20, 2018	August 20, 2018	0

Form can be edited by clicking on the pencil icon, which directs to the FormBuilder, or by downloading the XLS file and re-uploading it after making the changes.

Editing a Form



The screenshot shows a web interface with three tabs: 'SUMMARY', 'FORM' (selected), and 'SETTINGS'. Below the tabs, there's a section titled 'Current version' with a list of versions. The first version is 'v1 Last Modified : Today at 3:22 PM - 114 questions'. To the right of this version is a blue button labeled 'REDEPLOY'. A red arrow points from the text below to this button. Above the 'REDEPLOY' button are icons for edit (pencil), view (eye), refresh (circular arrow), and a menu (three dots).



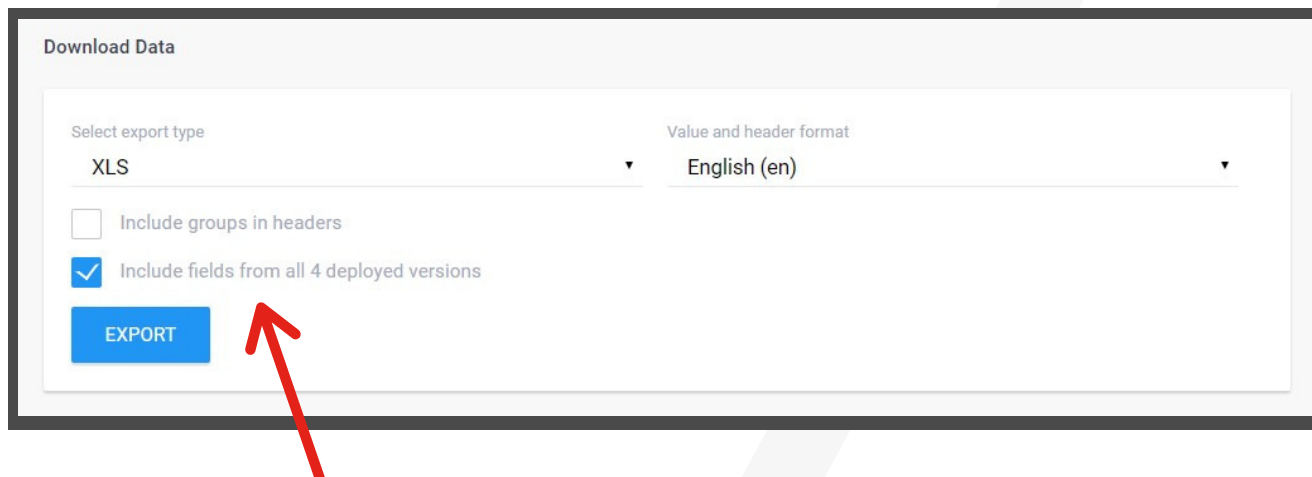
The screenshot shows a modal dialog box titled 'Overwrite existing deployment' with a close button (X) in the top right corner. The text inside the dialog reads: 'This form has already been deployed. Are you sure you want overwrite the existing deployment?' and 'This action cannot be undone.' At the bottom of the dialog are two buttons: 'OK' (blue) and 'CANCEL' (light blue).

**Form needs to be redeployed
after the changes were made.**

Editing a Form

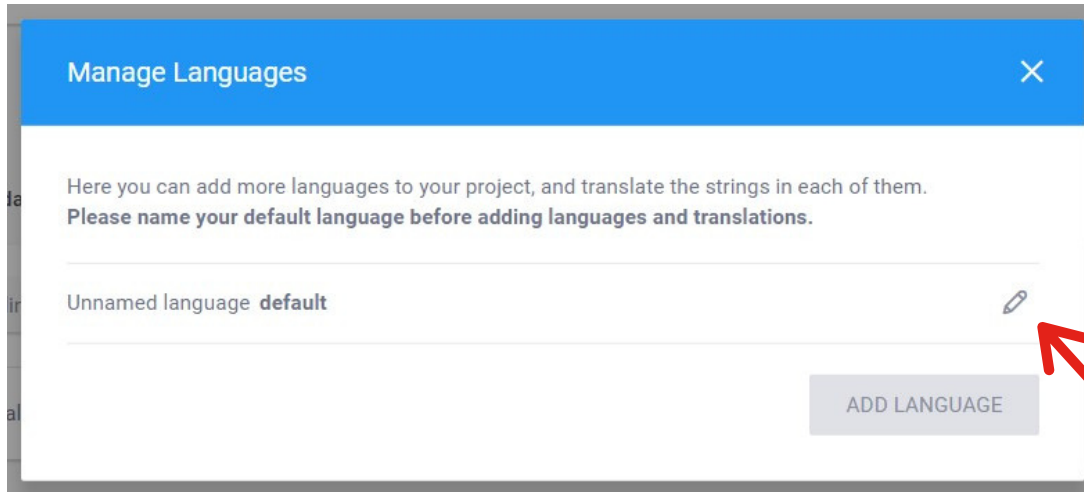
Redeploying the form makes the changes live, but there is still access to the previous versions of the form, which can be cloned to create new projects.

When you change a form, you will be able to choose between including all data (default) or only data from the most recent version of the form.



The screenshot shows a 'Download Data' dialog box. It has two dropdown menus at the top: 'Select export type' with 'XLS' selected, and 'Value and header format' with 'English (en)' selected. Below these are two checkboxes: 'Include groups in headers' (unchecked) and 'Include fields from all 4 deployed versions' (checked). At the bottom left is a blue 'EXPORT' button. A red arrow points to the 'EXPORT' button.

Language Options

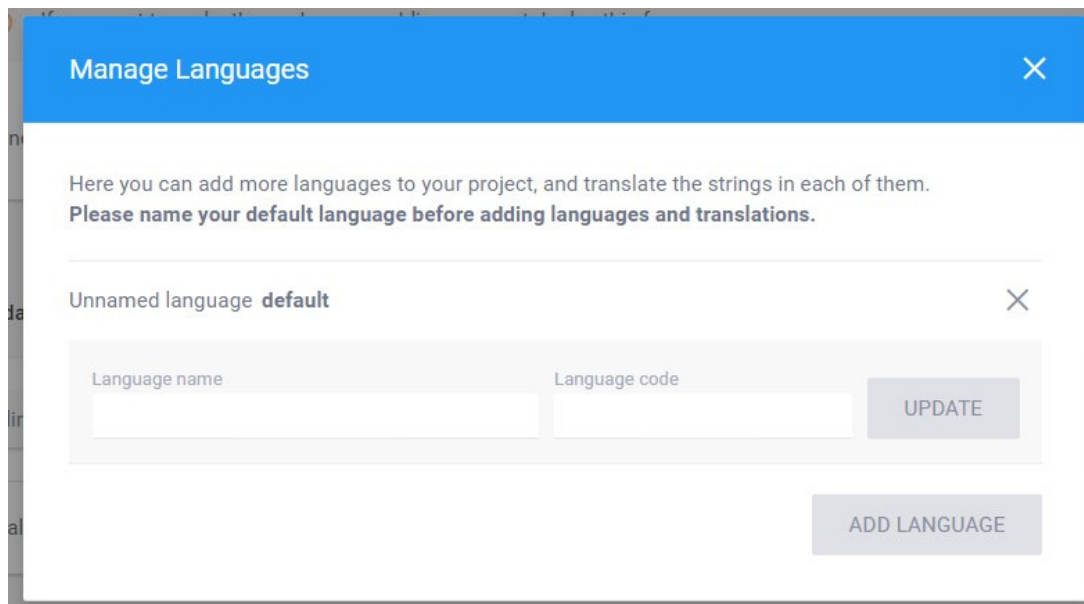
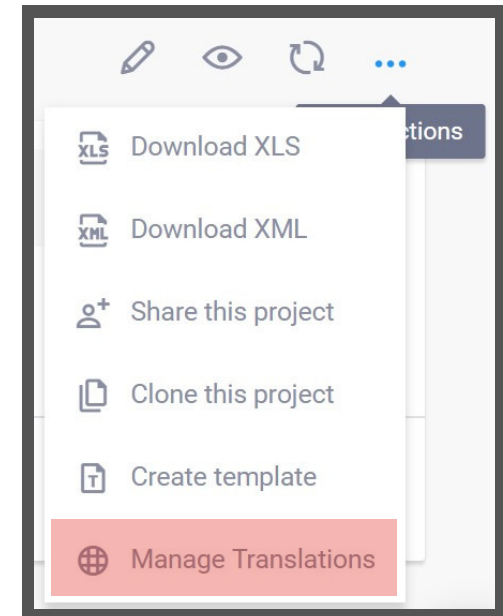


Manage Languages

Here you can add more languages to your project, and translate the strings in each of them.
Please name your default language before adding languages and translations.

Unnamed language default

ADD LANGUAGE



Manage Languages

Here you can add more languages to your project, and translate the strings in each of them.
Please name your default language before adding languages and translations.

Unnamed language default

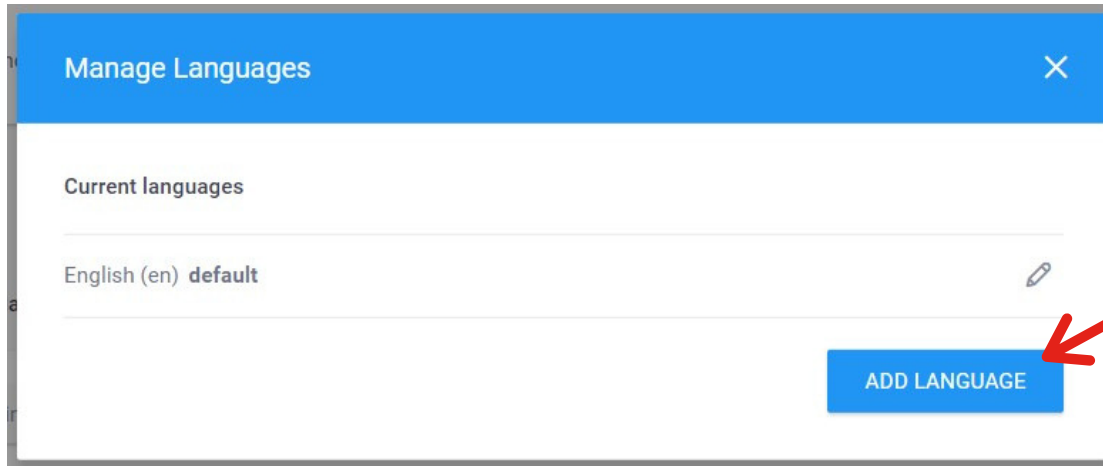
Language name Language code UPDATE

ADD LANGUAGE

First you have to set up a **default language**.

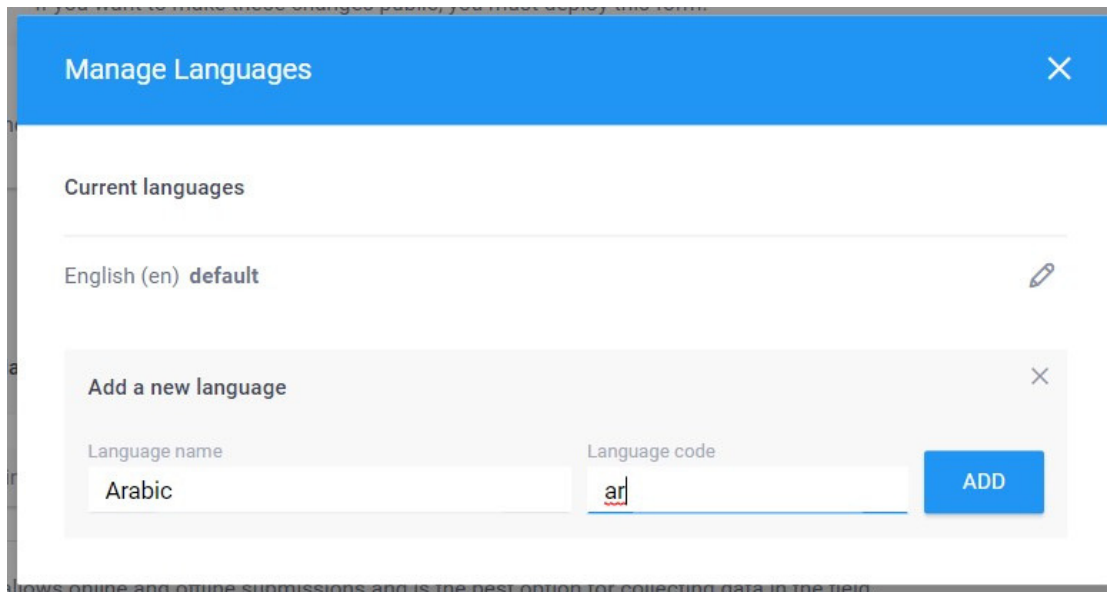
It is the language in which the form was initially created.

Language Options



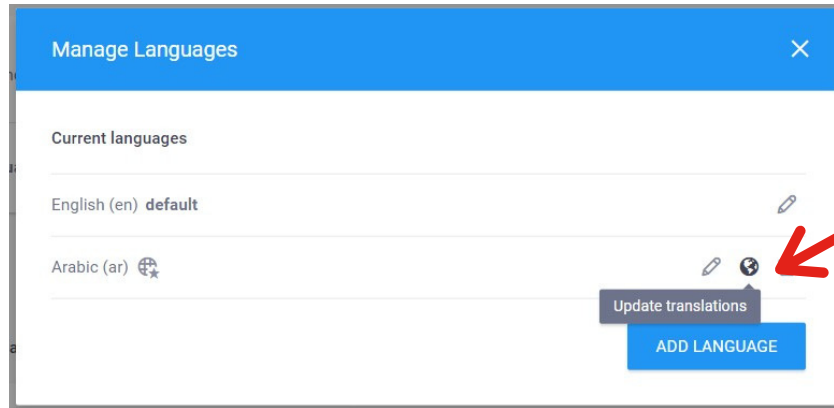
The screenshot shows a 'Manage Languages' dialog box. At the top is a blue header with the title 'Manage Languages' and a close button (X). Below the header, the 'Current languages' section contains a list with one entry: 'English (en) default'. To the right of this entry is a small edit icon (pencil). At the bottom right of the dialog is a blue button labeled 'ADD LANGUAGE'. A red arrow points from the text on the right towards this button.

Once a default language is set up, you can add another language.



This screenshot shows the same 'Manage Languages' dialog box, but with the 'Add a new language' sub-dialog open. The sub-dialog has a title bar with 'Add a new language' and a close button (X). It contains two input fields: 'Language name' with the text 'Arabic' and 'Language code' with the text 'ar'. To the right of these fields is a blue button labeled 'ADD'. The 'Current languages' section in the background remains visible.

Language Options



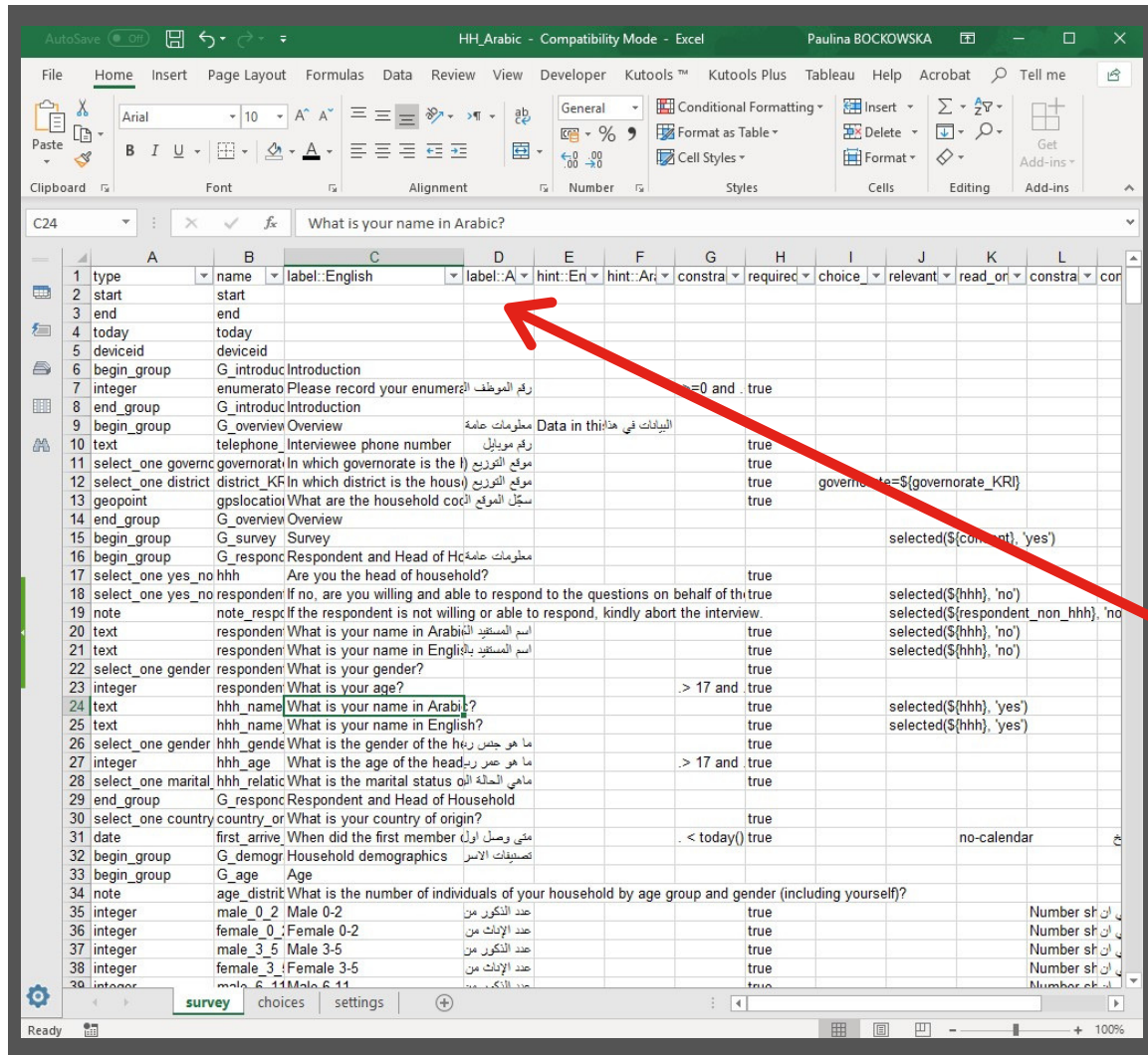
Once another language is added, click on an icon **Update translations**, and simply fill the table with translated text.

The 'Translations Table' dialog box displays a table for translating strings from English to Arabic. The table has two columns: 'Original string' and 'Arabic (ar) translation'. The 'Original string' column lists various disaster-related terms, and the 'Arabic (ar) translation' column provides the corresponding Arabic text. At the bottom, there are 'BACK' and '* SAVE CHANGES' buttons.

Original string	Arabic (ar) translation
Name of disaster	
Date	
Enumerator, Name and Family Name	رقم الموظف الميداني
Geographical area name	
Setting	
number of people before the disaster	
number of people who have left the area	
number of people who have returned	
number of people currently living in the area	
number of people affected (SUM)	
number of people displaced	
number of affected non-displaced	

Language Options

Another way to add additional language to the form is by exporting the form to XLS format, making the changes in an application like Excel, and then importing it again.



This allows your translator to quickly add all the required translations in Excel - without having to access to KoBo account.

1. Export the form to XLS.
2. Find the column called 'label'. Insert another column to the right of label. In the header (first row) of this new column, write label::language.
3. Then, if you have hints / error messages in your form, the same needs to apply to those columns.
4. Do the same in **Choices** sheet.
5. Return to KoBoToolbox and click on "Replace with XLS", then upload your updated XLS Form.

Detailed instructions can be found [HERE](#)



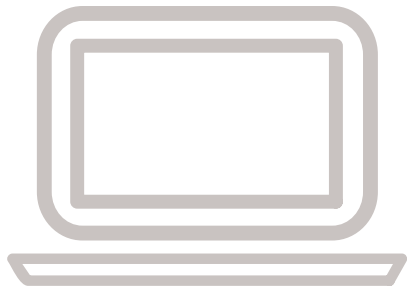
DATA COLLECTION

Data Collection

KoBoToolbox allows data collection in multiple ways. Because KoBoToolbox is built on the Xform/ODK technology, our forms are compatible with a number of different tools that can be used for data collection.

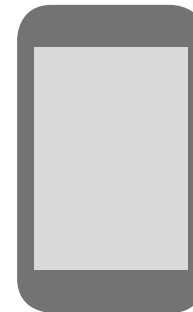
Enketo Webform

- Web Forms, also known as Enketo, are used by KoBoToolbox to preview your forms and to enter data directly on your computer.



KoBoCollect App

- KoBoCollect is an Android app that can be installed on any standard Android phone or tablet.



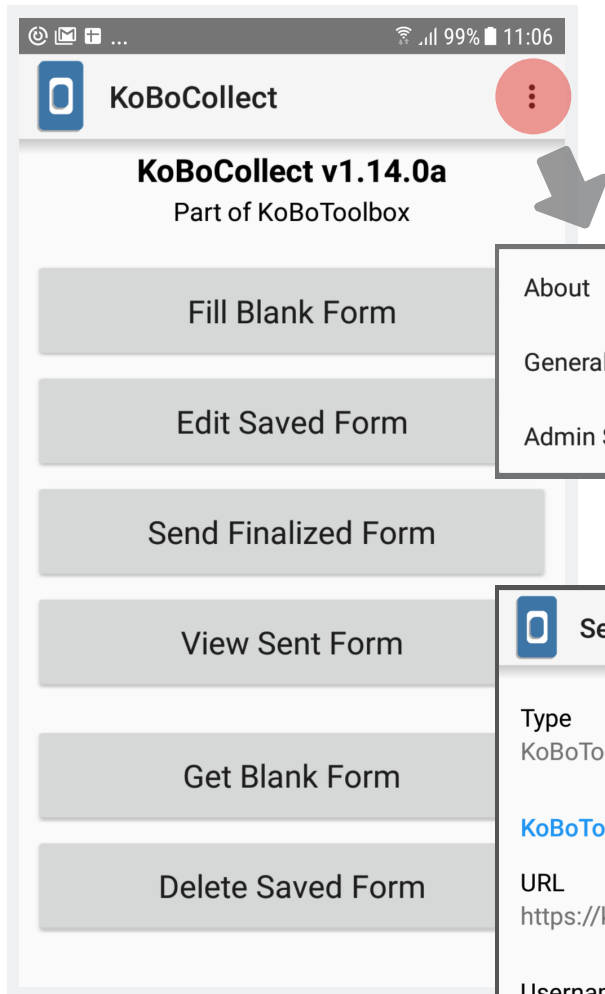
The app can be downloaded from **HERE.**

Enketo vs. KoBoCollect

	Web Forms (Enketo)	KoBoCollect App
Devices	any mobile device or computer	Android only
Default form display	all questions on the same screen	one question per screen
Data upload	automatically when connection available	on user request or immediately if connection available
Different form styles	yes	no
Encryption	not for storage, but always during transfer	can be enabled for storage on device and on the server and requires a separate tool (ODK Briefcase) to decrypt data

Downloading the App

After installing KoBoCollect, you need to configure it so that it can be used together with your KoBo account for data collection.

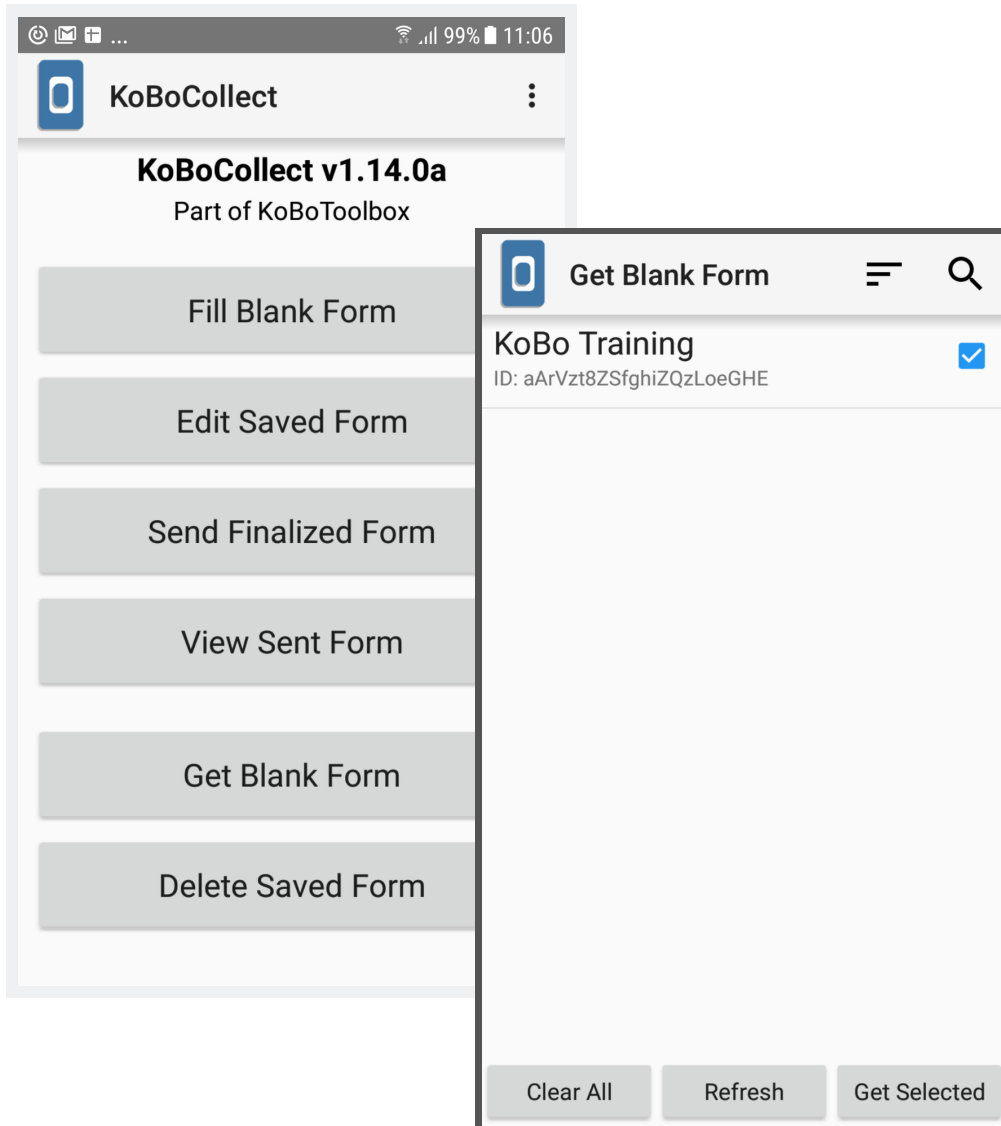


1. Install KoboCollect on your Android device.
2. On your Android device, open KoBoCollect and open the General Settings (this may be in the top right of your screen, the bottom right, or a button in the center bottom - depending on your Android version).

3. In General Settings, under URL, enter the server URL
`https://kc.humanitarianresponse.info`
4. Still in General Settings, enter your username and password.

These instructions are also listed on the Form page after you have deployed your project.

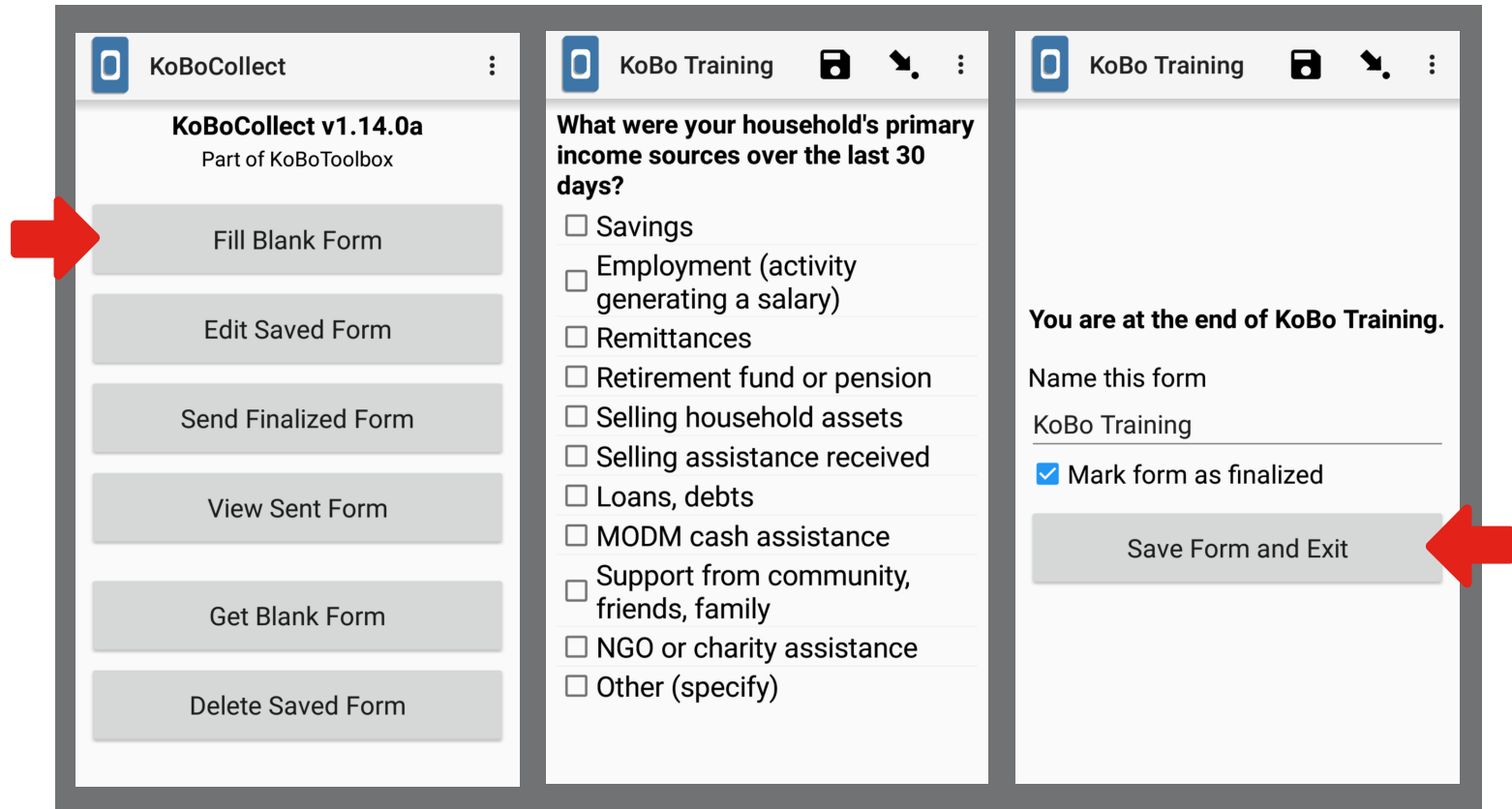
Downloading Forms



To download forms from your account and start data collection, follow these steps:

1. Make sure you are connected to the Internet on your device. Also, you need to have deployed at least one project in KoBoToolbox.
2. On the home menu of KoBoCollect, click Get Blank Form.
3. A list of all your forms from your different projects will be shown. Select the ones you wish to download) and click Get Selected.

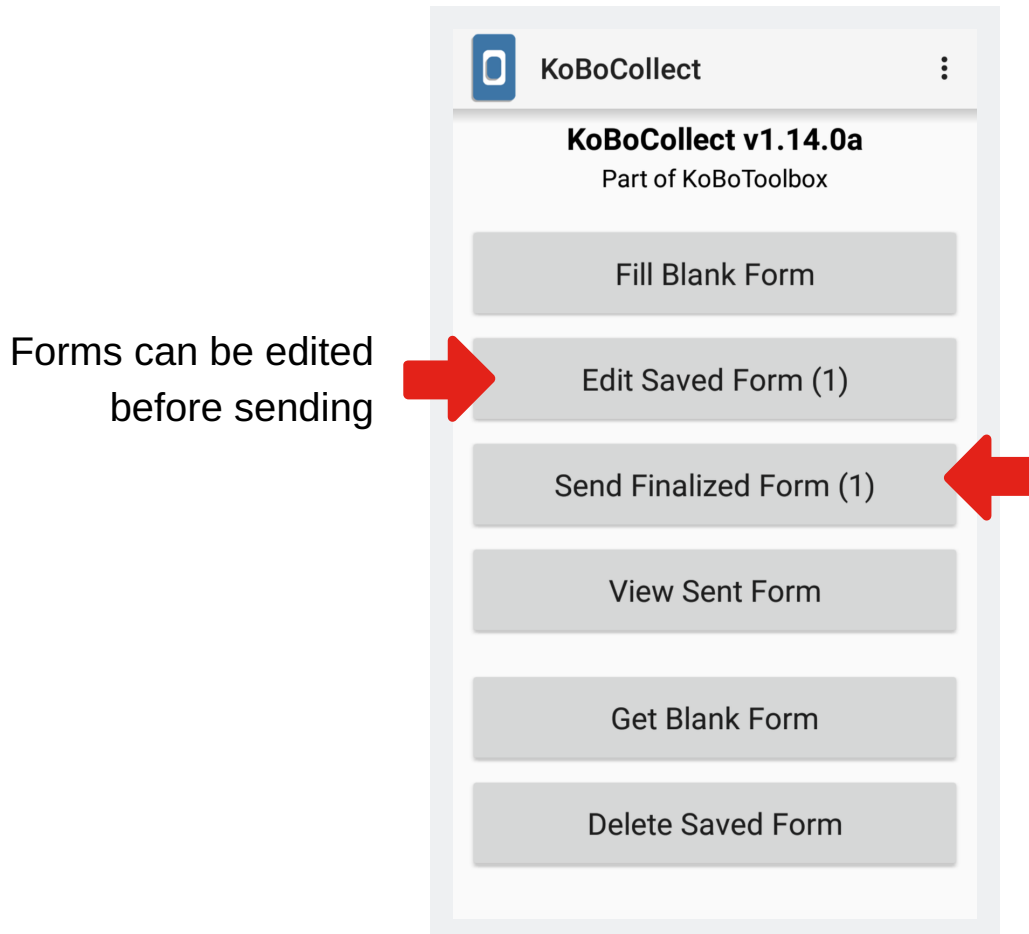
Mobile Data Collection



To collect data:

1. Click on Fill blank form.
2. Select the form to which you would like to enter data.
3. Go through all the questions (swiping your finger from right to left).
4. At the end click on Save Form and Exit (making sure the form is marked as 'finalized').

Mobile Data Collection



Uploading finalized data

1. From the home screen, click on Send Finalized Form.
2. A list of your most recently collected forms appears.
3. Click Select all (or select the ones you wish to send), then click Send Selected.



Troubleshooting KoBoCollect - the three most common issues, explained [HERE](#).

Collecting Data Offline

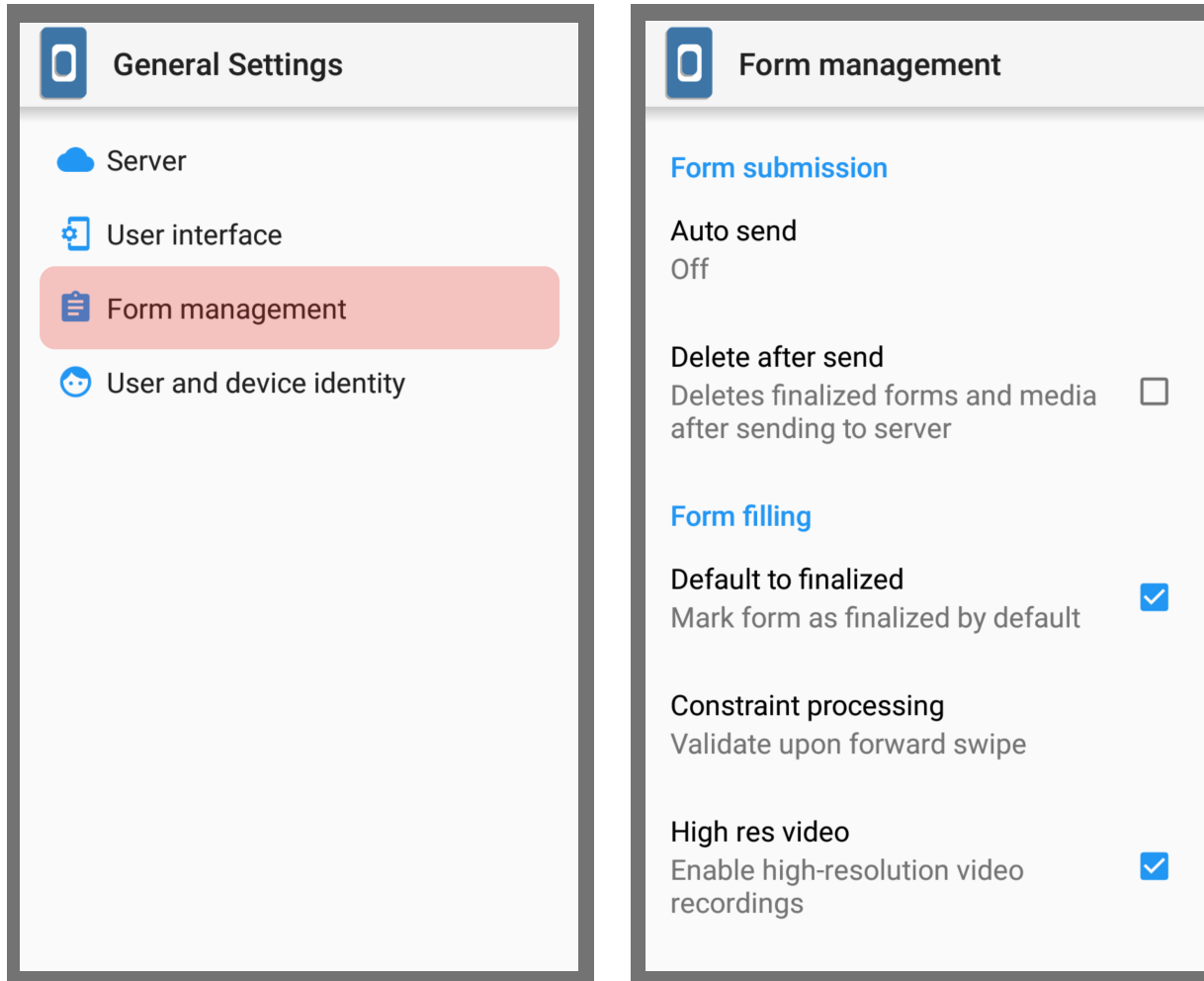
All data collection can take place offline, both with KoBoCollect and with Web Forms.

When a user enters data it is stored first on the device. KoBoCollect can be set to attempt sending the information through a network connection immediately or only at a later stage when the interviewer or supervisor wants to upload finalized forms.

Web Forms will always attempt to upload data immediately and will retry until a connection has been established again.

More information on collecting data offline can be found [**HERE**](#).

KoBoCollect Settings



General Settings

- Server
- User interface
- Form management**
- User and device identity

Form management

Form submission

Auto send
Off

Delete after send
Deletes finalized forms and media after sending to server ☐

Form filling

Default to finalized
Mark form as finalized by default ☒

Constraint processing
Validate upon forward swipe

High res video
Enable high-resolution video recordings ☒

- There are additional advanced configurations of the form, which can be access through General Settings.

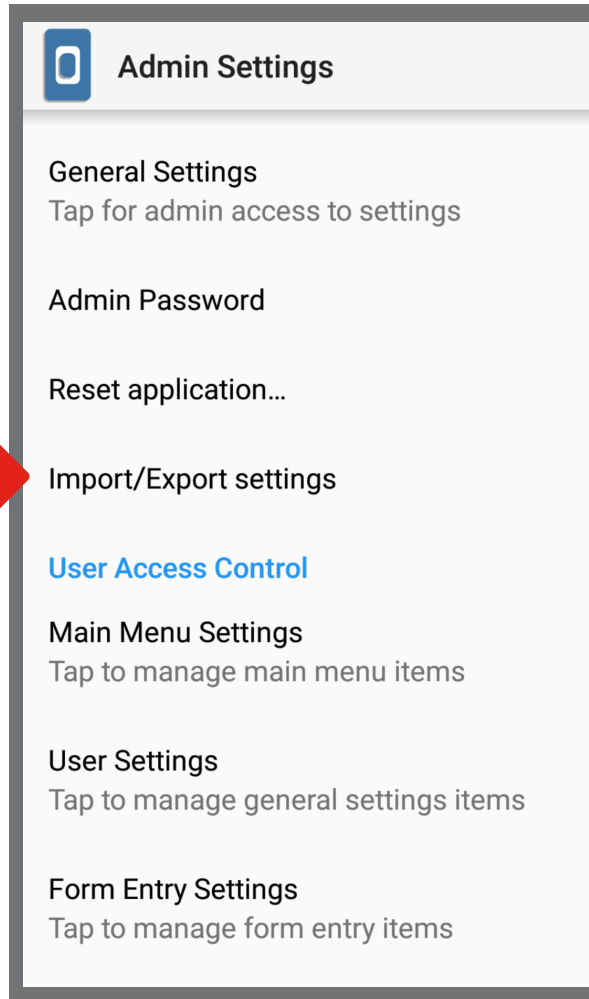
KoBoCollect Settings

KoBoCollect allows to copy settings from one phone to another, by using the QR code.

Click on Import/ Export settings and simply scan the code using the device to which you want to export the settings.



Be careful with sharing the code, as by default it includes your admin and server passwords.



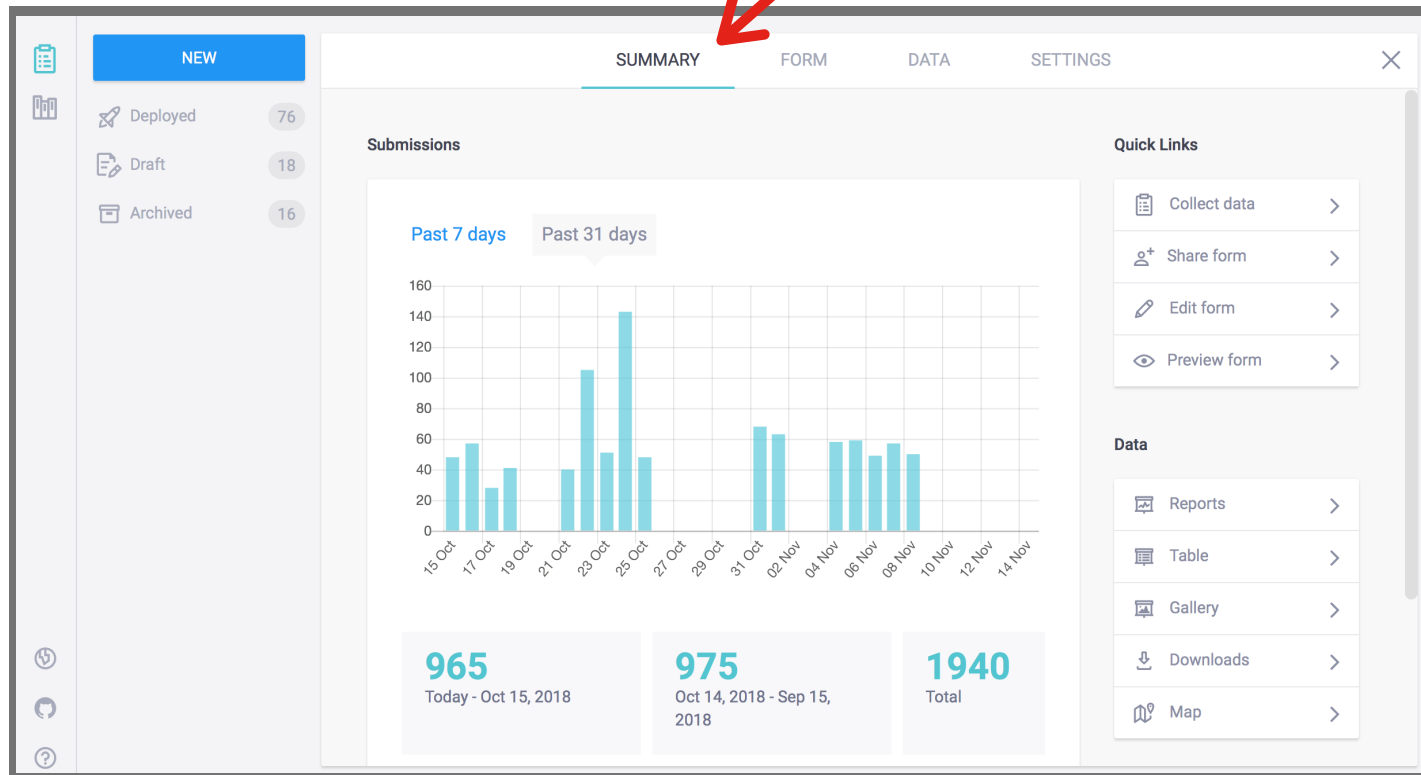


DATA MANAGEMENT

Data Management

The project summary gives a visual display of the high-level information relating to the project.

This includes the project's meta data (description, country, sector), the list of users that have access to this project, and a graph of the submissions over time, giving an overview of how the project is progressing.



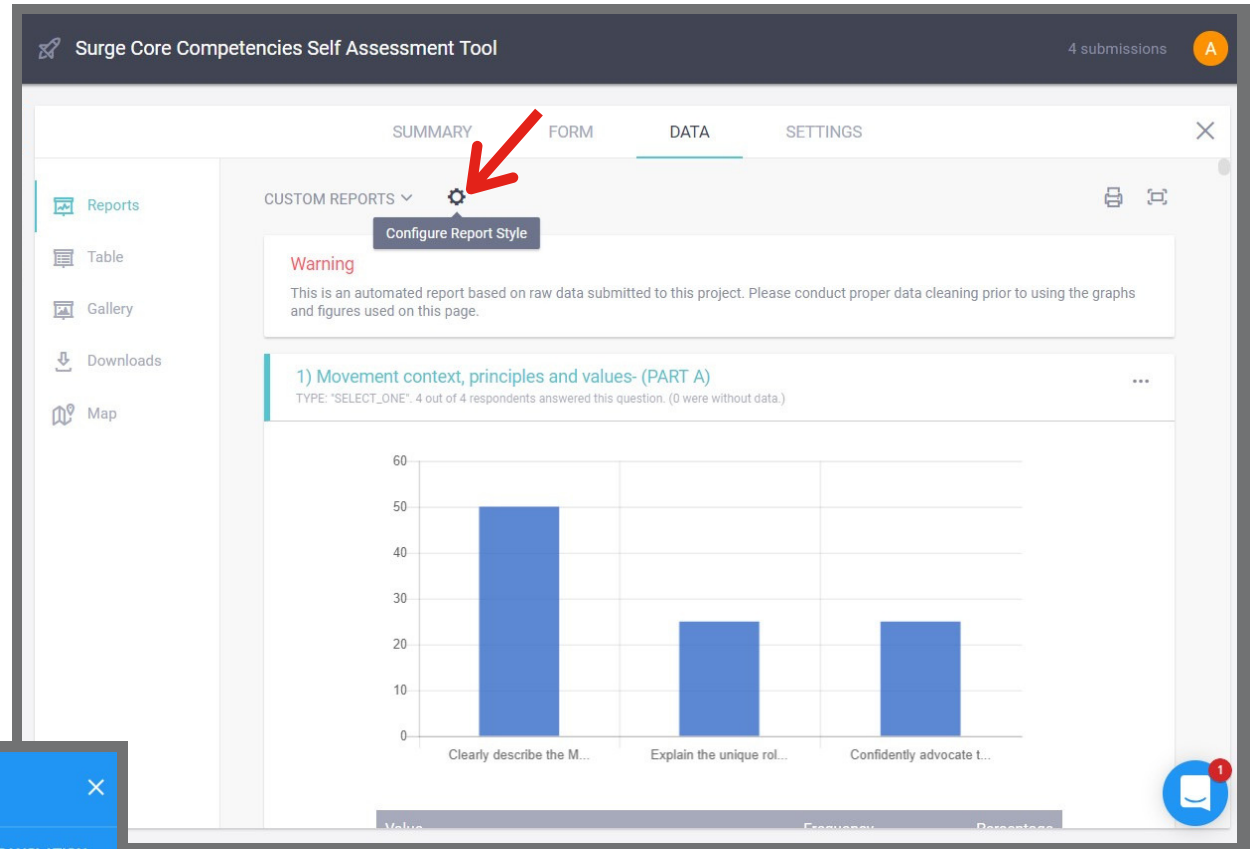
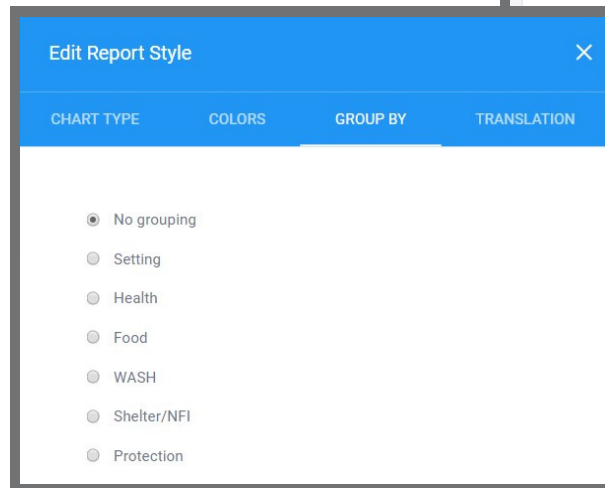
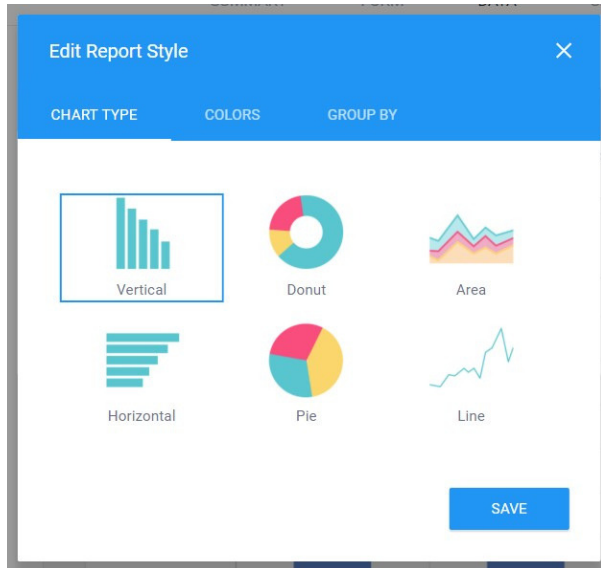
Analysing Data - Table

KoBo allows to explore the data collected, in different formats.

The screenshot displays the KoBoToolbox interface for a project named 'Nord Kivu - CEA - sensitization'. The top bar shows '1217 submissions' and a user profile icon 'E'. The left sidebar contains navigation options: Reports, Table (highlighted with a red arrow), Gallery, Downloads, and Map. The main content area has tabs for SUMMARY, FORM, DATA (selected), and SETTINGS. Below the tabs, it indicates '1 - 30 of 1217 results.' and shows a table of data. The table has columns for various categories, with some cells containing numerical values. At the bottom, there is a pagination control showing 'Page 1 of 41' and a '30 rows' dropdown. A red arrow points to the 'Table' tab in the top navigation bar.

Introduction / ...	Introduction / ...	Introduction / ...	Introduction / ...	Sensibilisatio...	Sensibilisatio...	Sensibilisatio...	Sensibilis...
Simbilyabo	Sensibilisatio...	Causerie éduc...	Lavage de ma...	561	481	636	
Simbilyabo	Sensibilisatio...	Dialogue Com...	Lavage de ma...	154	83	831	
Kanzulinzuli	Sensibilisatio...	Dialogue Com...	Lavage de ma...	2	1	18	
Kanzulinzuli	Sensibilisatio...	Dialogue Com...	Lavage de ma...	2	1	18	
Vighole	Sensibilisatio...	Dialogue Com...	Enterrements ...	29	53	8	
Luotu	Porte a porte		Lavage de ma...	45	49	77	38
Katolo	Porte a porte		Signes et sym...	45	49	77	38
Kyangike	Porte a porte		Enterrements ...	120	65	117	79
Vutsundo	Porte a porte		Enterrements ...	116	61	95	151
Rughenda	Porte a porte		Enterrements ...	37	22	48	48
Mitova	Porte a porte		Enterrements	95	58	119	93

Analysing Data - Report



When you click on the Configure Report Style, you can create summary reports with graphs and tables and adjust your report's charts and colours.

It also allows to disaggregate the data in reports i.e. by gender, region or sector - click on **GROUP BY**.

Analysing Data - Custom Reports

KoBo allows to create custom reports in which users can include only the indicators they are actively monitoring.

The screenshot displays the 'Surge Core Competencies Self Assessment Tool' interface. The top navigation bar includes 'SUMMARY', 'FORM', 'DATA', and 'SETTINGS'. A red arrow points to the 'CUSTOM REPORTS' dropdown menu, which is open, showing options for 'Default Report' and 'Create New Report'. The main content area shows a bar chart for '1) Movement context, principles and values- (PART A)' with three categories: 'Clearly describe the M...', 'Explain the unique rol...', and 'Confidently advocate t...'. Below the chart is a table with columns 'Value', 'Frequency', and 'Percentage'.

Custom Report

Untitled Report

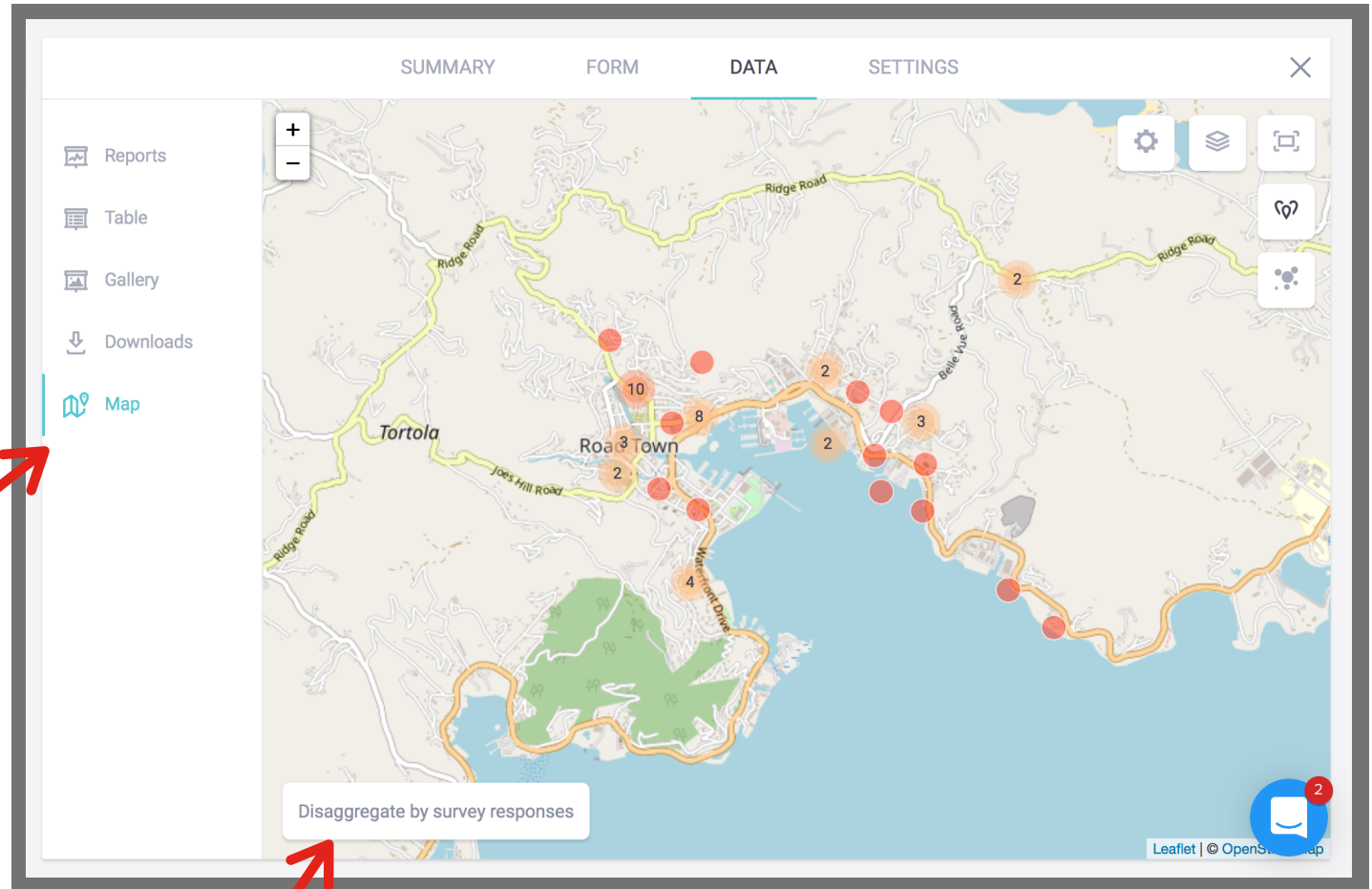
Include the following questions:

- ☐ 1) Movement context, principles and values- (PART A)
- ☐ 1) Movement context, principles and values- (PART B)
- ☐ 1) Movement context, principles and values- (PART C)
- ☐ Unlabeled
- ☐ 2) The Movement in the humanitarian sector (PART A)
- ☐ 2) The Movement in the humanitarian sector (PART B)
- ☐ Unlabeled
- ☐ 3) Coordination-
- ☐ Unlabeled
- ☐ 4) Assessment-
- ☐ Unlabeled
- ☐ 5) Programme Management and Reporting- (PART A)
- ☐ 5) Programme Management and Reporting- (PART B)
- ☐ 5) Programme Management and Reporting- (PART C)

Value	Frequency	Percentage
Clearly describe the Movement mandates, fundamental principles & values and relate them to own work	2	

Analysing Data - Map

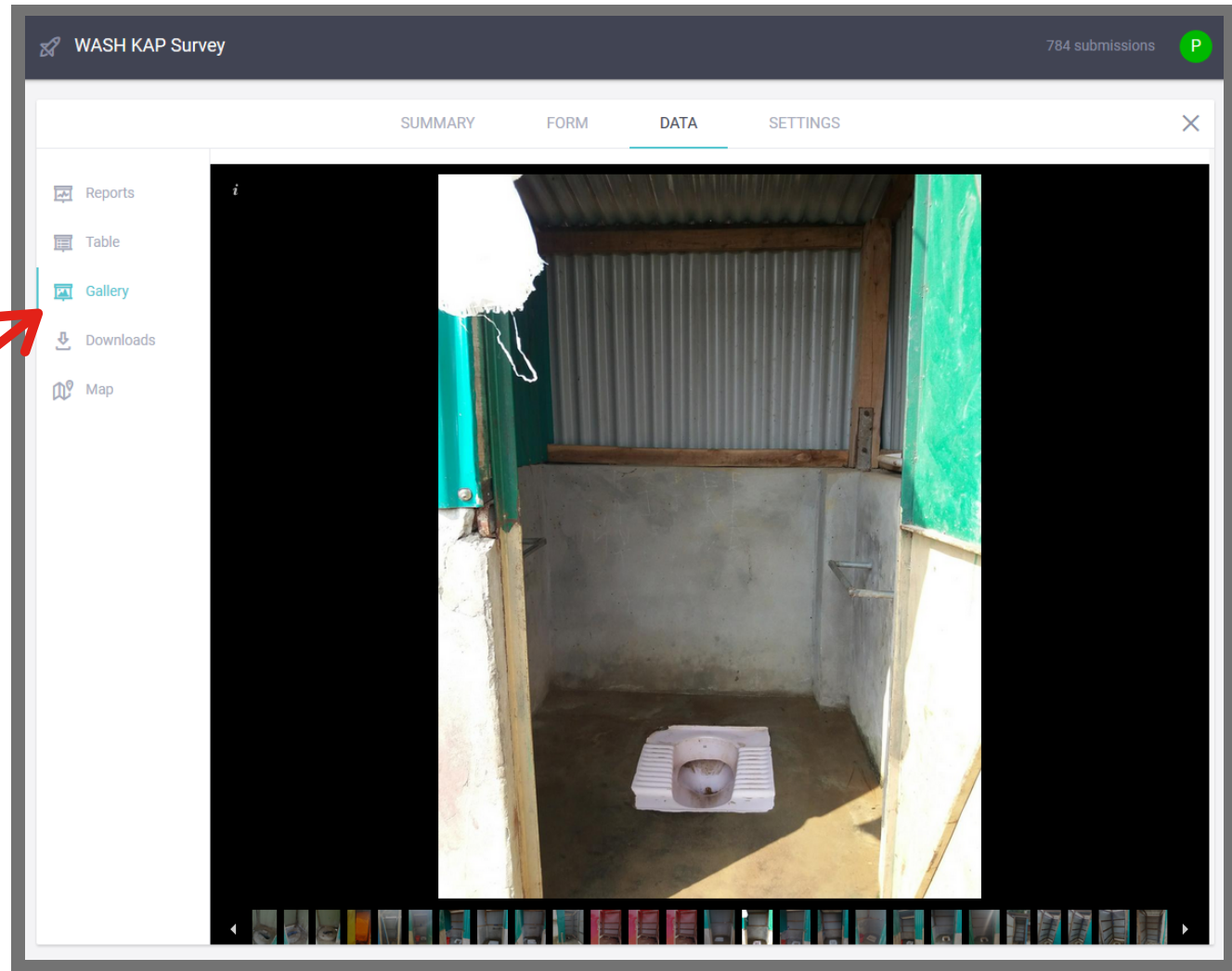
Recorded GPS locations can be viewed on a map



and can be disaggregated
by survey responses

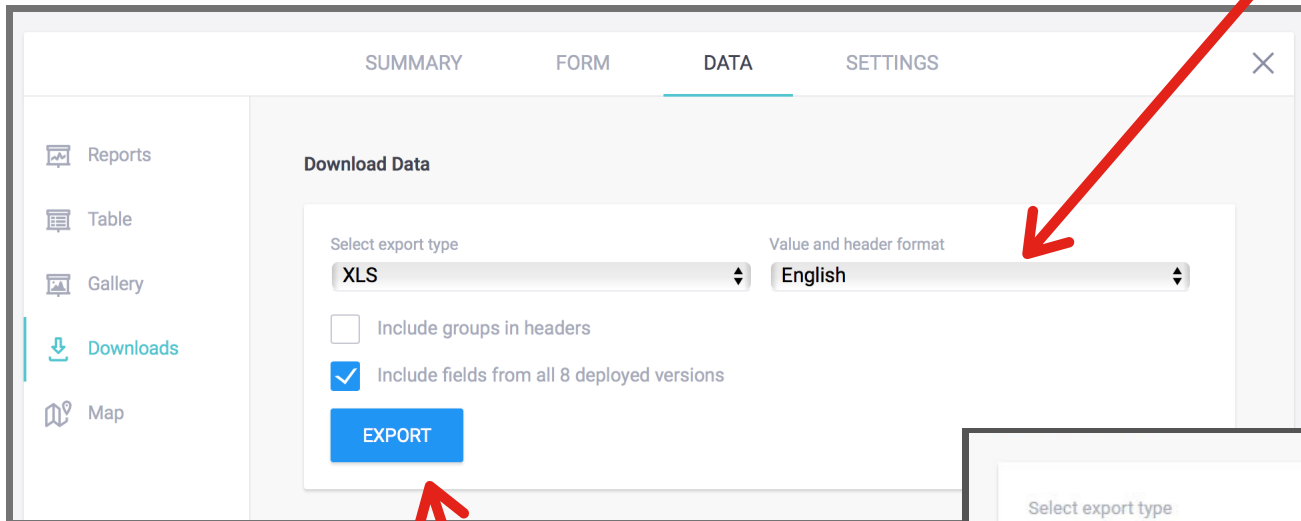
Analysing Data - Gallery

In the gallery you can see your collected media



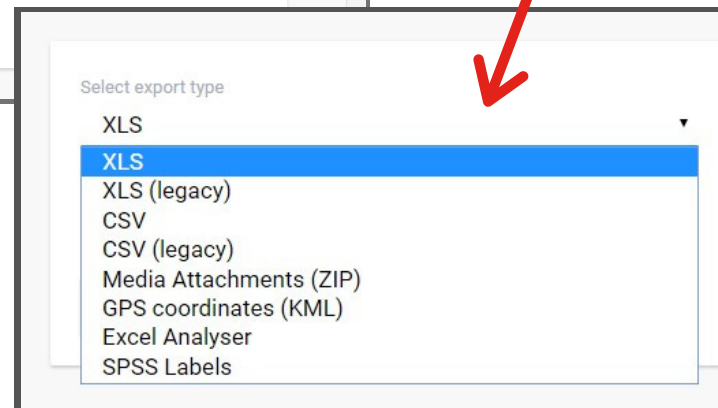
Downloading Data

When the form is in multi-language, one can select in which language the data should be downloaded.



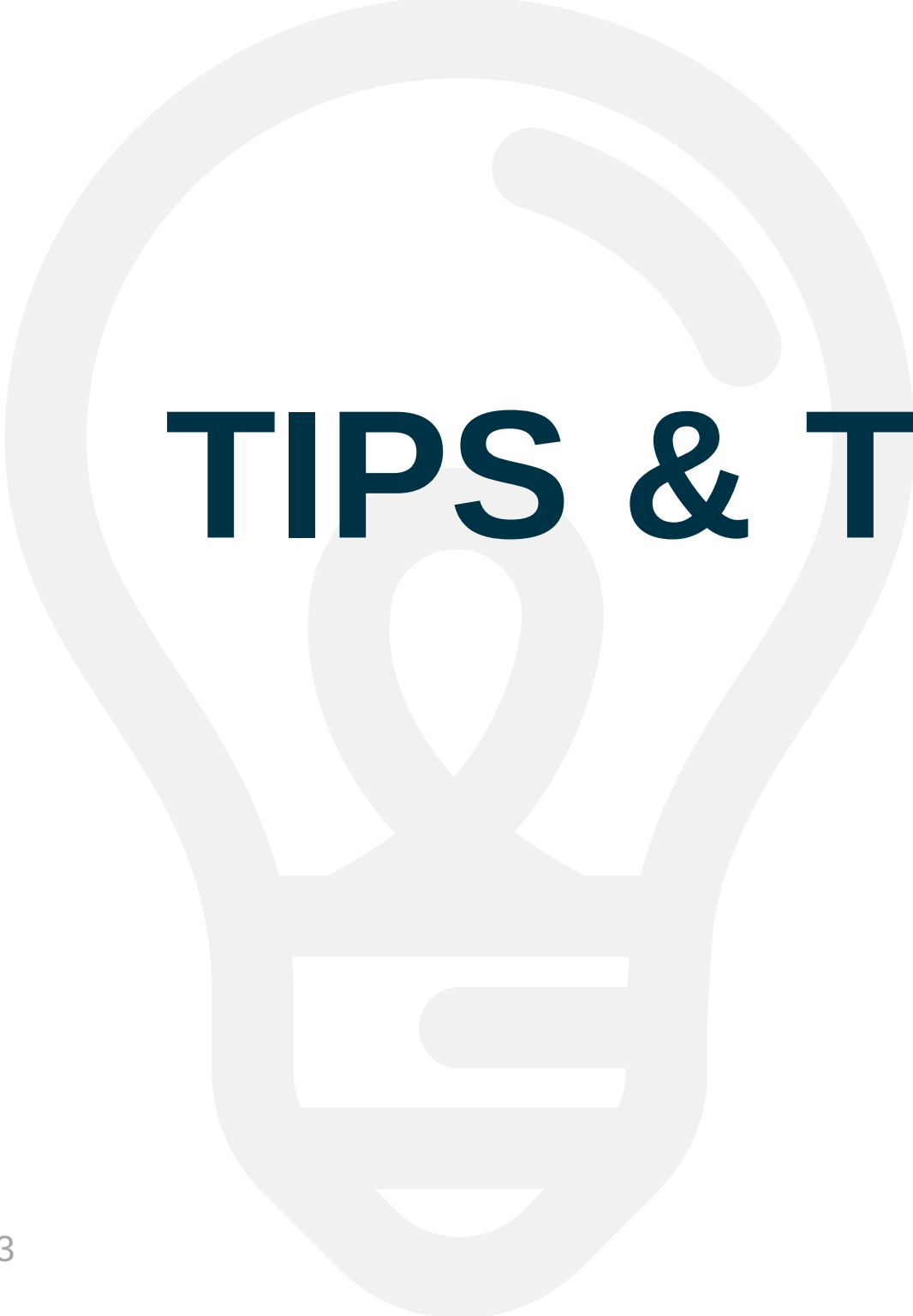
The screenshot shows a web application interface with a sidebar on the left containing icons for Reports, Table, Gallery, Downloads, and Map. The main content area has tabs for SUMMARY, FORM, DATA, and SETTINGS. The 'DATA' tab is active, displaying the 'Download Data' form. This form includes two dropdown menus: 'Select export type' (set to 'XLS') and 'Value and header format' (set to 'English'). Below these are two checkboxes: 'Include groups in headers' (unchecked) and 'Include fields from all 8 deployed versions' (checked). A blue 'EXPORT' button is at the bottom of the form. A red arrow points from the text above to the 'Value and header format' dropdown.

Data can be downloaded in multiple formats.



This is a close-up of the 'Select export type' dropdown menu. The menu is open, showing a list of export formats: XLS, XLS (legacy), CSV, CSV (legacy), Media Attachments (ZIP), GPS coordinates (KML), Excel Analyser, and SPSS Labels. The 'XLS' option is currently selected and highlighted in blue. A red arrow points from the text above to this dropdown menu.

To download your data, first select the desirable format and then press **EXPORT**.



TIPS & TRICKS

Tips

- **Set up the metadata for the start and end of the survey**

During a pilot it allows to check how long does it take to do an interview; also can be used as a check if enumerator did not rush or in extreme cases made up data completely

- **Put constraints for numerical entries such as age, family size, or phone numbers**

- **Add question hints for clarification**

for instance: 30 minutes walking = 2 km (approximately)

- **If you have lots of numerical data, download it in CSV**

Excel exports everything as text-fields, meaning you need to "convert to numbers" manually. This problem does not happen with CSV exports.

- **Archive forms that are no longer used for data collection**

To avoid collecting data using the wrong form; it is especially important when having a large team of enumerators

- **A mandatory question, is only mandatory when the question is asked (visible)**

You can set a question to mandatory even when it can be skipped with Skip-Logic functionality. If the question

Tips - Questions

Grouping Questions and Repeating Groups

Groups are collection of one or more questions (or groups themselves) inside a form.

- By using groups:
- A large form can be divided into multiple large sections.
 - Several questions can be skipped by grouping them and setting a single Skip logic condition.
 - A set of questions should be repeated indefinitely for every unit, such as members of a household.
 - A set of questions should be displayed together on the same screen during data entry.

To **create a group** just select one question, then click the Group Questions button. Then, drag and drop the other questions in your form that you want included in this group.

The screenshot displays the KoBo Training form editor interface. At the top, there's a header bar with the project name 'KoBo Training' and a 'SAVE' button. Below the header, a toolbar contains icons for viewing, editing, and grouping questions. A tooltip 'Create group with selected questions' is visible over the grouping icon. The main area shows a form titled 'What were your household's primary income sources over the last 30 days?'. This form contains a list of questions, each with a corresponding value field. The questions and their values are:

Question	Value
Savings	savings
Employment (activity generating a salary)	employment_activity_generatin
Remittances	remittances
Retirement fund or pension	retirement_fund_or_pension
Selling household assets	selling_household_assets
Selling assistance received	selling_assistance_received
Loans, debts	loans_debts
MODM cash assistance	modm_cash_assistance
Support from community, friends, family	support_from_community_frien

Tips - Questions

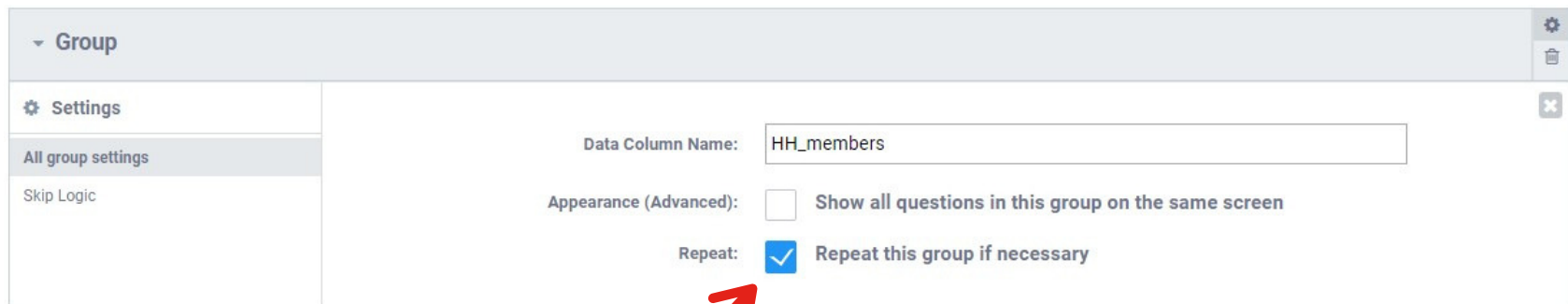
Grouping Questions and Repeating Groups

- In order to display all questions on the same screen when collecting data with KoBoCollect, click on the group's settings box and tick 'Show all questions in this group on the same screen'.

Creating a Group of Repeating Questions

- To create a group of repeating questions, first group the questions that should be repeated and then go to the group's Settings and tick Repeat this group if necessary.

The number of times this repeat group can be answered is by default unlimited.



The screenshot shows the 'Group' settings interface in KoBoCollect. On the left, there is a sidebar with a 'Group' header and three options: 'Settings' (selected), 'All group settings', and 'Skip Logic'. The main area displays the following settings:

- Data Column Name:** A text input field containing 'HH_members'.
- Appearance (Advanced):** A section with two options:
 - ☐ Show all questions in this group on the same screen
 - ☒ Repeat: Repeat this group if necessary

A red arrow points to the checked 'Repeat' checkbox.

ADVANCED USERS: It is possible to set the number of loops in advance to a specific number. To specify the number of repeat loops, save your form and export it to XLS format. Inside the file, add a column in the survey sheet called 'repeat_count'. For the specific repeat group in your file, enter a number into that column.

Tips - Questions

Defining 'Other' in select-one or select-many questions

In order to capture all possible responses when asking a select-one or select-many question, include the response option "other" to the list of choices.

▼ What were your household's primary income sources over the last 30 days?

Savings	Value: AUTOMATIC
Employment (activity generating a salary)	Value: AUTOMATIC
Remittances	Value: AUTOMATIC
Retirement fund or pension	Value: AUTOMATIC
Selling household assets	Value: AUTOMATIC
Selling assistance received	Value: AUTOMATIC
Loans, debts	Value: AUTOMATIC
MODM cash assistance	Value: AUTOMATIC
Support from community, friends, family	Value: AUTOMATIC
NGO or charity assistance	Value: AUTOMATIC
Other (specify)	
+ Click to add another response...	

Then add a text question below this to prompt the respondent to specify their answer.

Click on the Settings icon for the text question, and add the condition that this text question will only appear if "other" was selected in the preceding question.

abc If other, please specify

Settings

Question Options

Skip Logic

Validation Criteria

This question will only be displayed if the following conditions apply

What were your household's primary income sources over... = Other (specify)

+ Add another condition

Tips - Questions

Rating vs. ranking questions

A rating question asks survey respondents to compare different items using a common scale

e.g. “Please rate each of the following objects on a rating scale of 1-10, where 1 is ‘not at all important’ and 10 is ‘very important.’”

A ranking question asks survey respondents to compare a list of different objects to one another

e.g. “Please rank each of the following items in order of importance with #1 being the most important object to #10 being the least important object.”

- The Ranking question asks respondents to compare items to each other by placing them in order of preference.
- When analyzing ranking questions, an average ranking is calculated for each answer choice, allowing to quickly evaluate the most preferred answer choice.

Tips - Questions

Question Matrix response type

The **Question Matrix** response type allows users to create a group of questions that display in a matrix format, whereby each cell within the matrix represents a separate question.

	Possess?	How many?
Car	☐ Yes ☐ No	_____
Bike	☐ Yes ☐ No	_____
TV	☐ Yes ☐ No	_____

To use this response type, define the number of rows and columns you want in your matrix set and give each row and column a label or name. Each column can be a different question type.

NOTE: This response type only works when using Enketo, utilizing the Grid-theme layout. Forms are set to single page layout by default - to change it, find the "layout" button in the formbuilder toolbar, select "grid-theme", save this change, and redeploy your form to make these changes live.

This question type is not compatible with XLSforms!

Tips - Question Library

The question library allows you to save and reuse frequently used questions.

- To manage the Question Library click on the application menu button in the top left and choose Question Library from the sidebar. By default the library will display all questions saved there.
- Questions can be viewed or edit individual by clicking on the edit button at the right of each question.
- New questions can also be added from within the library. Just click on NEW and then select Question.

KoBoToolbox Search Library P

NEW

- Question
- Template
- upload
- collection

My Library Filter by type: Select...

Name	Type	Owner	Last Modified
1 What is the number of individuals of your household by age gro...	Question	me	Today at 10:53 AM
1 Please record your enumerator ID code.	Question	me	Today at 10:52 AM

2 library items available

Tips - Question Library

The question library also allows you to create forms templates and questions collections, both in the interface of the platform, as well as by importing large sets of questions and blocks from Excel, based on the XLSForm standard. By default, each XLS file will import as a new Collection.

Advanced users will find it more practical to start from existing XLSForms than copying existing question content into the tool one by one.

THIS EXCEL FILE can be use a template to create collections.

The file generally follows the XLSForm format. There a few differences:

- The main sheet containing the questions should be name library instead of survey.
- (Optional) Question blocks should be defined in the additional column called block, writing the same block title in each row of the table that should be included in the block. The block label has no limitations in terms of characters, but it needs to be the exact same spelling to avoid breaking the block up ('Household questions' is different from 'household questions'). Use a block title that makes it easy to identify the contents later on.
- Any row in the template sheet that doesn't have a value in the block column will be imported as a separate question.
- (Optional) Define any tags for the question or block by adding a column tag:[your tag name] for each tag, then writing '1' in each row that should use the tag. In the case of blocks, it's enough to write '1' in any of the rows in the block regardless which one. It's enough to mark one of the questions in the block, though it doesn't matter if several questions are tagged.

Tips - Collecting GPS Locations

Location coordinates can be collected easily in all forms with the 'GPS' response type.

The interviewer will be asked to press a button in the form after which the device will attempt to find the current location in the form of latitude and longitude coordinates.

To collect a GPS coordinate during the data collection process simply add a GPS question to your form. During data entry the enumerator will see a button on their device to register their current location. If their device doesn't have a GPS sensor or GPS is disabled, a location might be determined using other means, which might not be as accurate.

To obtain a GPS signal you should be outdoors with good visibility of the sky.

To get a strong GPS signal:

- Stand as far from buildings, trees, or other structures as possible
- Make sure your body isn't obstructing view of the sky
- Get an initial GPS location at the beginning of the day before starting to collect points in the field
- Enable A-GPS (data-network assisted) on your device

Tips - Permissions

KoBoToolbox allows giving different permission levels to a data collection project.

Requiring passwords for accessing forms

By default KoBoToolbox only requires a username and password for accessing data and managing your projects. Forms can be accessed by anyone who knows the respective URL. To require users to log in to access your forms go to Settings inside your online account and tick 'Require authentication to see forms and submit data'.

Setting Project-specific user permissions

To control Project permissions go to the Settings box in your data collection project, enter the username of the user who should get new permissions, select the permission level, then click Save Permissions. **The three available permissions are:**

- Can view (access data collected),
- Can edit (make changes to the collected data or the project description, which includes viewing permissions),
- Can submit to (only collect data but not see results)

Detailed instructions can be found [HERE](#)

Tips - Record Validation

A Project owner can give a “Can Validate” permission to other users.

Users with this permission can view a record, edit it if necessary, and assign a status to the record in question. Assigning a status to a particular record/submission raises data collection standards for teams with more than one enumerator.

The validation status labels available include:

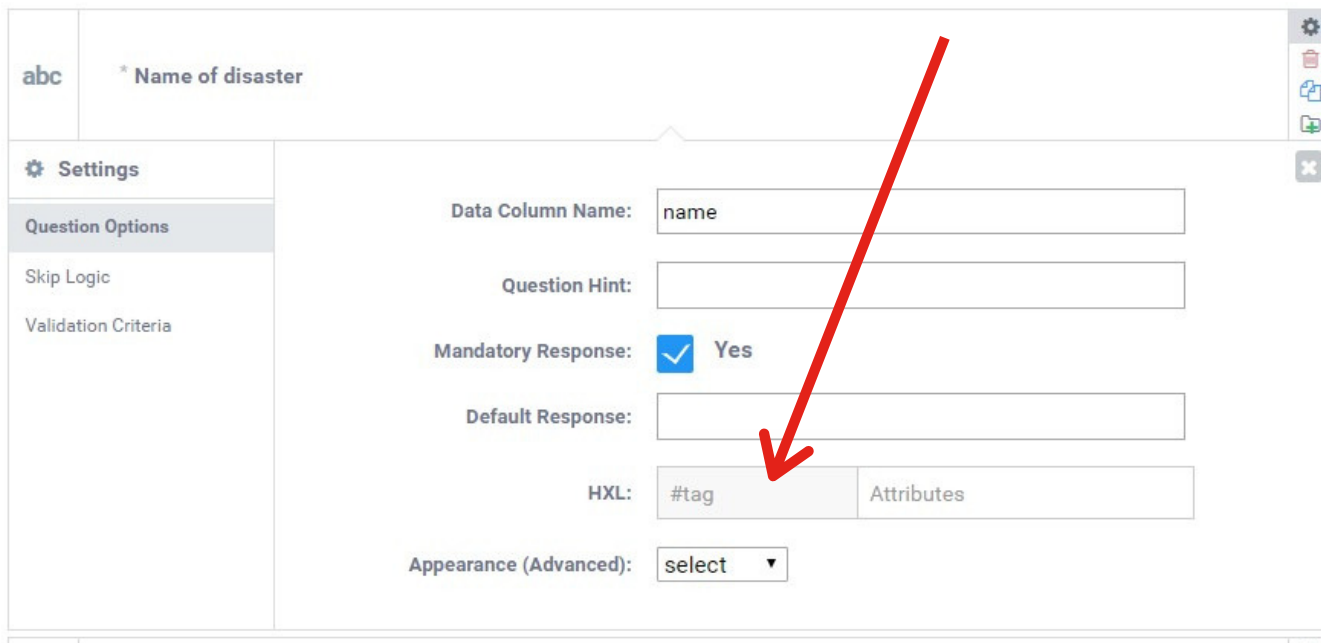
- **On Hold:** Record is under review.
- **Approved:** The data within this record is accurate.
- **Flagged for Removal:** The data within this record should be removed from the data set.

This new permission adds a “Validated” column to your project's data table.

Detailed instructions can be found [HERE](#)

Tips - HXL tags

HXL stands for Humanitarian Exchange Language. The goal of HXL is to improve information sharing during a humanitarian crisis by creating a simple way to promote interoperability of data. It does this by coding the data through hashtags #.



The screenshot shows a form editor interface. On the left is a sidebar with a 'Settings' section containing 'Question Options', 'Skip Logic', and 'Validation Criteria'. The main area is titled 'abc * Name of disaster'. It contains several fields: 'Data Column Name' with the value 'name', 'Question Hint' (empty), 'Mandatory Response' with a checked checkbox and the text 'Yes', 'Default Response' (empty), and 'HXL' with the value '#tag' and an 'Attributes' field. A red arrow points to the '#tag' value in the HXL field. At the bottom, there is an 'Appearance (Advanced)' dropdown menu set to 'select'.

More information on HXL, can be found [HERE](#)

KoBo Hacks

1.

Number questions can save ONLY up to 9 digits (positive or negative number).

If you want a numeric response but need a number with more than 9 digits (i.e. larger than the one given above) - e.g. for long phone numbers in some countries - you can do this with a trick. Instead of a Number question, add a Text question to your form. Then in the Appearance setting of the question, set it to numbers. This will show the number keyboard instead of the standard text keyboard.

2.

Referencing responses Inside Another Question

When referencing other questions always use the unique question name inside the question referencing style: `${question_name}`

3.

Encrypting Forms

KoBoCollect supports the ability to encrypt the content of a form the moment it is marked as completed and ready for submission on the phone.

This procedure is quite technical and is intended for users who are comfortable with advanced technical instructions and requires strict attention to detail.

Instructions on how to do it can be found [HERE](#).

4.

Restricting text responses with regular expressions

KoBo allows restricting possible responses to text questions (and technically any other question) by using the very powerful regular expression syntax, or regex.

To use a regex to restrict possible options, follow these steps for your text question:

- Go to the question's Settings
- Go to Validation Criteria, choose the manual syntax option
- Enter your regex between the quotation marks of this formula **regex(., " ")**

For reference, "." (the period) refers to 'this question', while the regular expression inside the quotation marks needs to conform to the established regex rules.

Examples of regular expressions:

- Only allow a number of nine digits (e.g. a phone number): `regex(., '^[0-9]{9}$')`
- For a ten digit phone number use `regex(., '^[0-9]{10}$')`
- If the first number can't be 0, use `regex(., '^[1-9][0-9]{8}$')`
- Only allow a valid email address `regex(., '[A-Za-z0-9._%+-]+@[A-Za-z0-9.-]+\.[A-Za-z]{2,4}')`
- Enter a code (e.g. beneficiary ID) consisting of numbers and lowercase letters, up to 6 characters long `regex(., '[a-z]{1,6}$')`
- Enter a beneficiary ID corresponding to a specific existing format, e.g. "mz-00-0000" `regex(., '^mz-[0-9]{2}-[0-9]{4}$')`

Visit www.regexr.com for help and more examples.

KoBo Hacks

5.

Adding a custom logo to your form

One of the optional features is including a custom logo at the beginning of the form once it has been deployed as a new survey project.

- You first need a file called `form_logo.png` which contains your logo. Make sure the file size is no more than a few kilobytes since it will load faster and won't be very big in any case.
- In your survey project, open the Project settings box. Under 'Existing form files' click Add document to select the file on your computer and upload it.
- When you get the form (whether on KoBoCollect or in Enketo Web forms) the logo will be downloaded along with the rest of the form and displayed at the very beginning.

6.

Collecting signatures

Kobo Collect allows for a digital signature to be collected directly on the screen of the phone/tablet.

To add this to your form:

- Open or download the XLS version of your form.
- Create the question and set the type as "image"
- Set the appearance to "signature".

7.

Adding Cascading Select Questions

See the VIDEO HERE

KoBo Hacks

8.

Custom formatting in Web forms

When using web forms (Enketo) as your data collection method you have the option to format your question labels in several ways.

To format your note text use one of these options:

- *emphasize* words by wrapping them inside `_these_` or `*these characters*`
- **strongly emphasize** words by wrapping them inside `__these characters__` or `**these**`
- a link can be added by using `[a link](https://www.kobotoolbox.org)`



This formatting will not work in KoBoCollect, which will just show the `_` or `*` characters along with the text.

9.

Adding media to your form

In addition to text questions or responses, you can also include visual or audio media in your forms and have it play or display inside the questionnaire. This works both on the Android app as well as in Web forms (Enketo).

You can include images, videos or audio in your form. This requires exporting the file to the XLSForm format and then editing it in Excel.

Instructions on how to do it can be found [HERE](#).

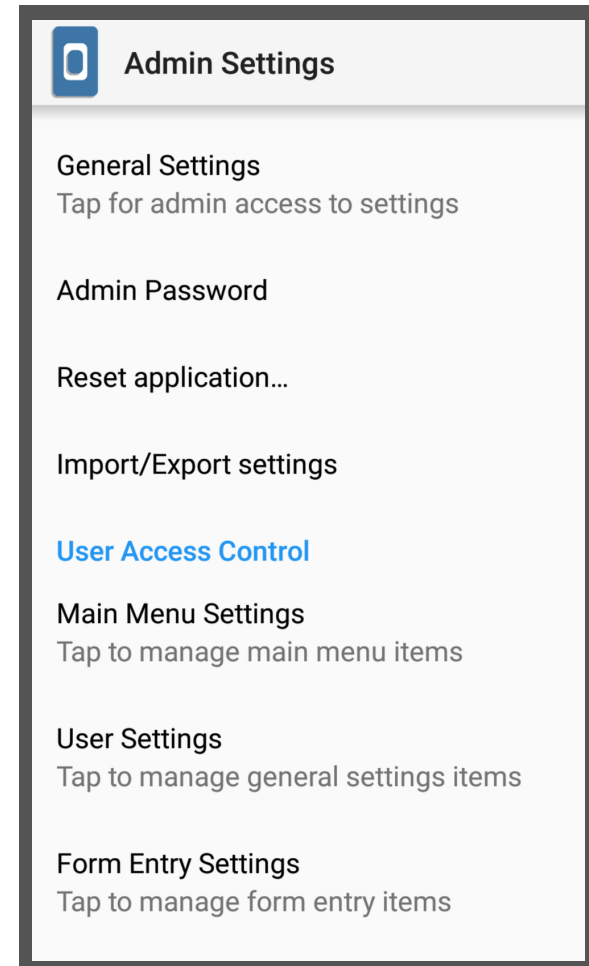
KoBo Hacks

10.

Hiding buttons and options within KoBoCollect

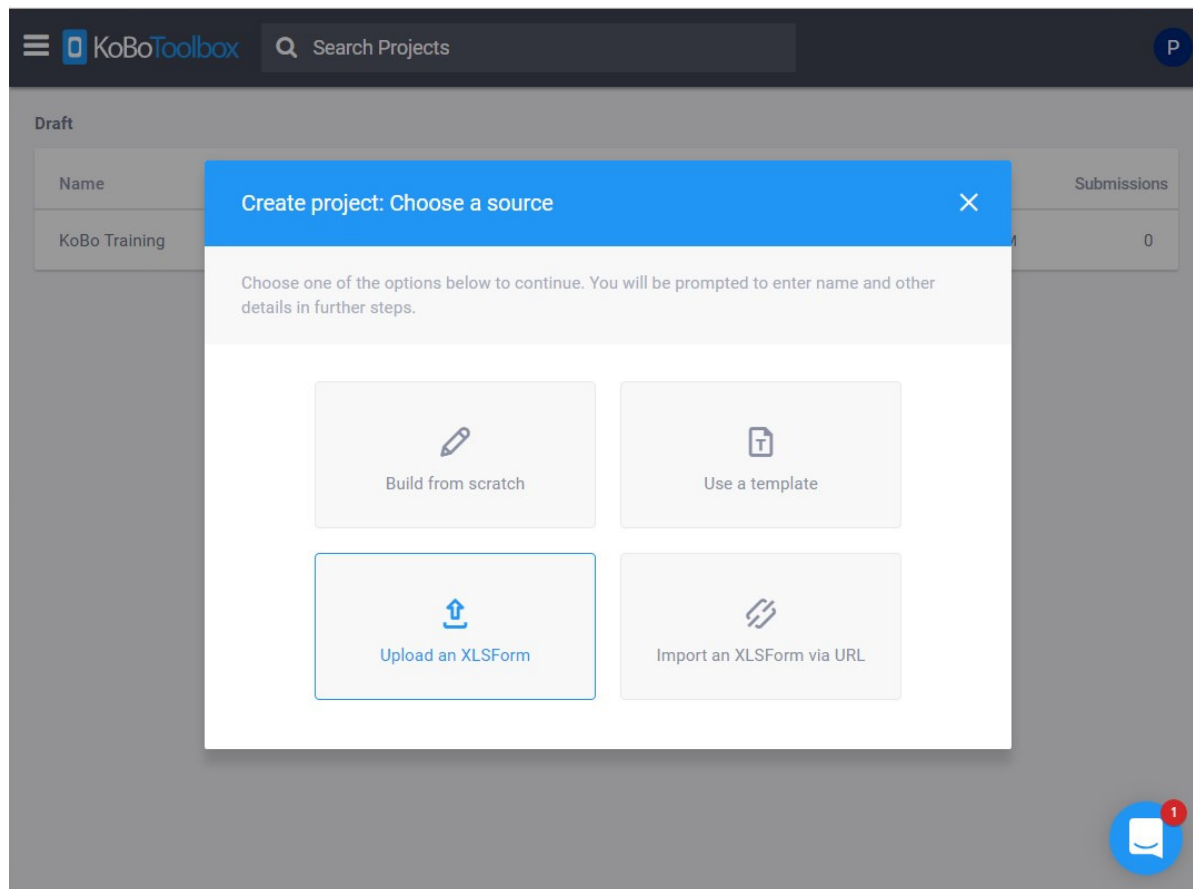
You are able to hide many of the buttons available in KoBoCollect.

1. On the home screen click the Android menu button.
2. Choose Admin Settings.
3. Select the buttons you would like to hide from the different screens. If you set an admin password, your interviewers won't be able to access the Admin settings to ever get access to these buttons.



XLSForm - Excel

You can import an existing form from an external file in the XLSForm format or via URL.



When importing an XLSForm via URL, please make sure that the URL points to the XLS file directly and that it is publicly accessible. A quick way to test this is to load the URL in a browser: it should trigger the download of the file. (If it loads a page in the browser, then it's not the right URL.)

Additional Features



Converting your Data into SPSS and/or Stata - [HERE](#)

Pulling your data into Excel Power Query - [HERE](#)

Pulling your data into PowerBI - [HERE](#)

Using the Excel Analyzer - [HERE](#)

REST Services - [HERE](#)

KoBoToolbox on Your Computer or Server - [HERE](#)

The background features a large, light gray circular arrow pointing clockwise. Overlaid on this are two faint, light gray icons: a document with horizontal lines on the left and a document with a checklist on the right.

PRACTICAL EXERCISE

Exploring KoBo Formbuilder

Create a KoBo form with the excerpt from the IFRC Initial Assessment tool



INTERNATIONAL
FEDERATION

Initial Assessment Tool

Name of Disaster:

Date:

Enumerator, Name and Family Name:

Geographical area name:

Setting (Urban/rural/semi urban):

people before the disaster:

people who have left the area:

people who have returned:

of people currently living in the area:

people affected (SUM):

people displaced:

affected non-displaced:

casualties:

1. Do you have a situation of concern in the one or more of the following sectors?

Health	Food	WASH	Shelter/NFI	Protection	Education	Livelihood	Other
Yes No	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No

2. If yes, what is the severity of this problem?
Scoring: 1= minor problem and 5= life threatening problem

Health	Food	WASH	Shelter/NFI	Protection	Education	Livelihood	Other

3. If yes, what are the main factors contributing to this problem?
Scoring: 1= factor with low impact | 2= factor with medium impact | 3= factor with high impact

Factors	Health	Food	WASH	Shelter/NFI	Protection	Education	Livelihood	Other
Access								

Initial Assessment Tool

International Federation of Red Cross and Red Crescent Societies

4. Without more assistance than the one already provided, are you worried about your ability to meet your basic needs for the following sectors in the next 3 months?
Scoring: 1= Not worried at all and 5= Worried of survival concerns

Health	Food	WASH	Shelter/NFI	Protection	Education	Livelihood	Other

5. Who are the top three affected groups that require immediate assistance in this area?

Affected Group #1 :	Affected Group #2	Affected Group #3

6. What are the top three priority sectors requiring immediate assistance in this area?

Priority Sector #1 :	Priority Sector #2	Priority Sector #3

7. What are the top three vulnerable groups requiring immediate assistance in this area?

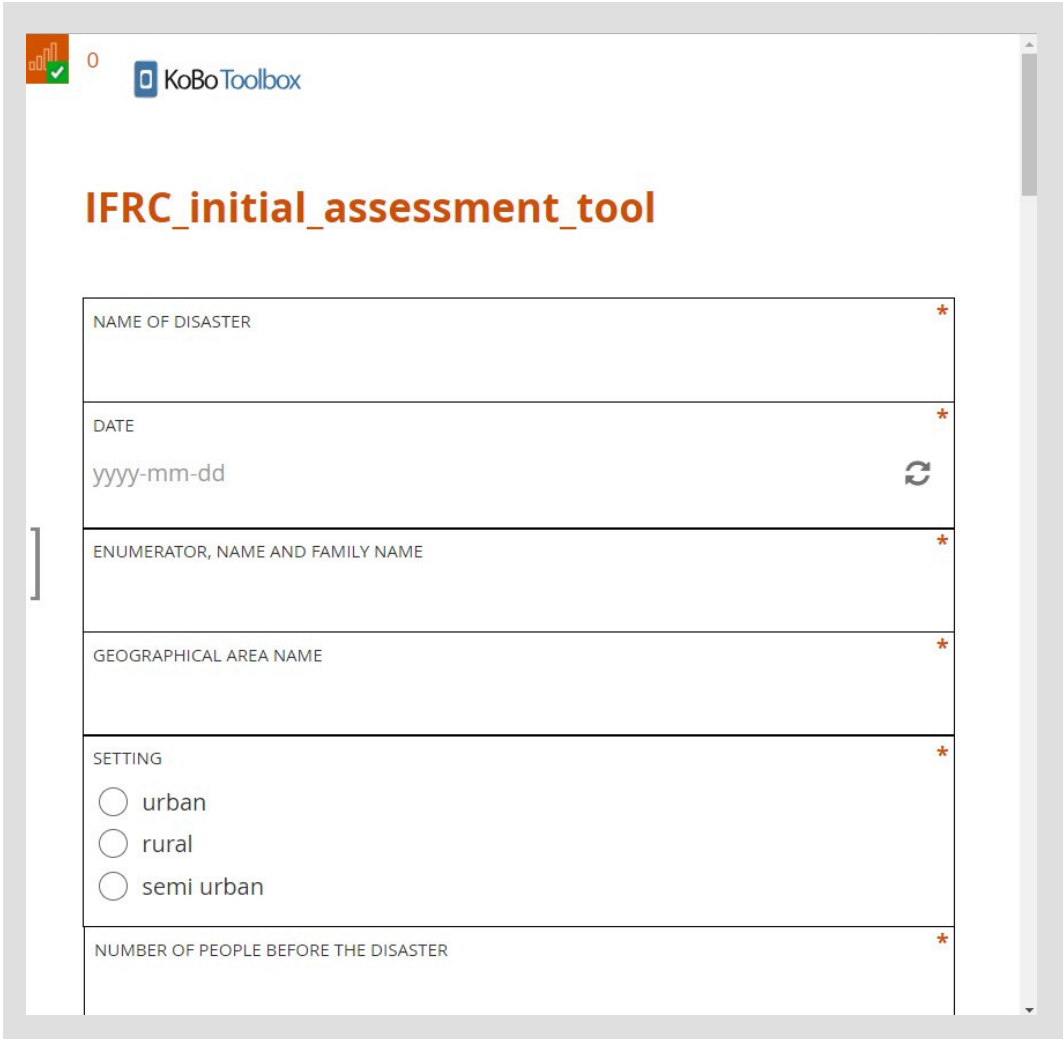
Vulnerable Group #1 :	Vulnerable Group #2	Vulnerable Group #3

8. What are the top three response modalities you would favour? (Chose among cash assistance, Service provision, in kind, etc.). If cash selected, verify that markets are functioning...

Response Modality #1 :	Response Modality #2	Response Modality #3

Exploring KoBo FormBuilder

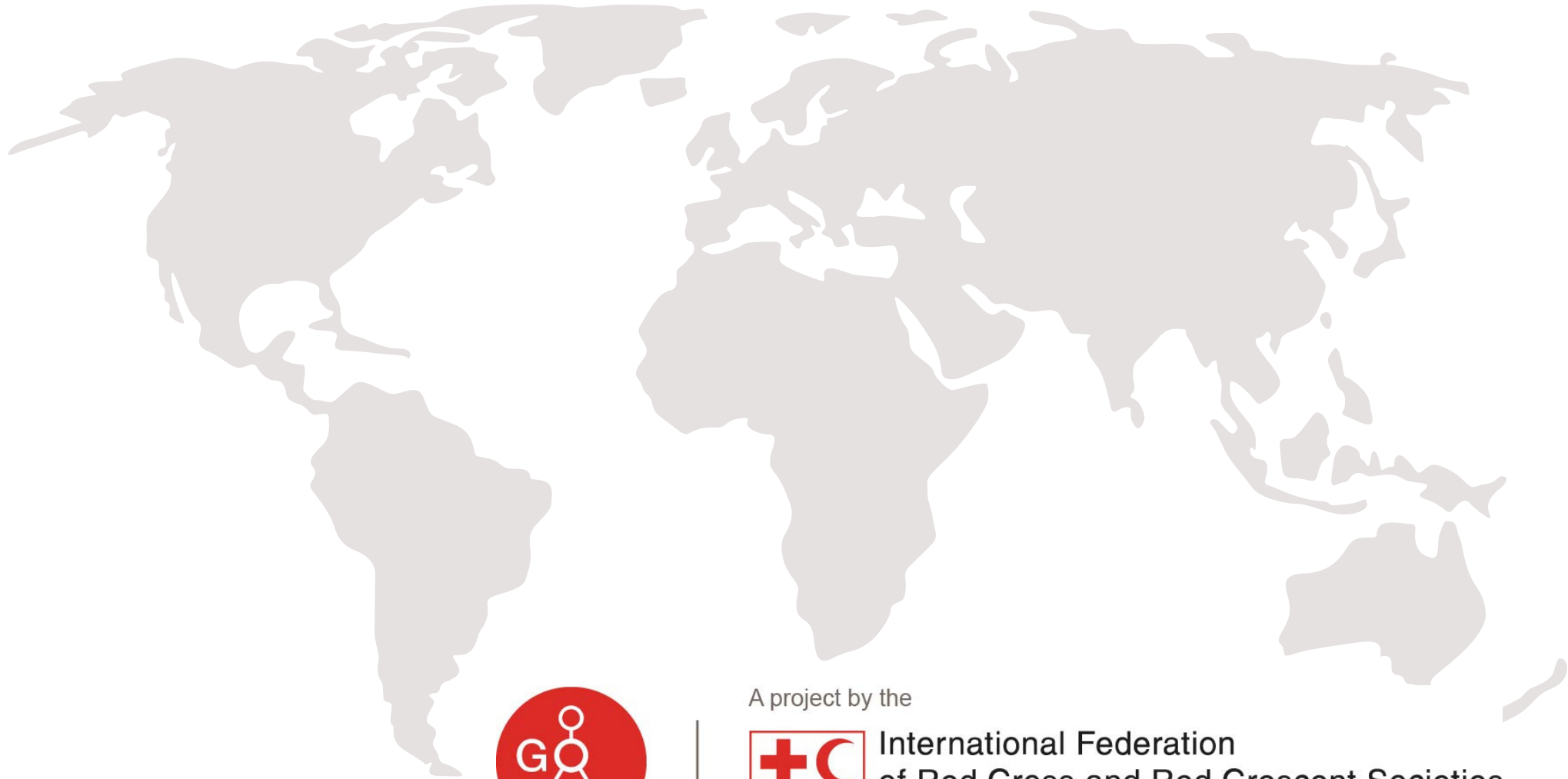
Solution



The screenshot displays the KoBo Toolbox interface. At the top left, there is a status bar with a green checkmark icon, a '0' indicator, and the 'KoBo Toolbox' logo. The main title of the form is 'IFRC_initial_assessment_tool' in orange text. The form consists of several input fields, each with a red asterisk indicating it is a required field:

- NAME OF DISASTER**: A text input field.
- DATE**: A text input field with a placeholder 'yyyy-mm-dd' and a refresh icon on the right.
- ENUMERATOR, NAME AND FAMILY NAME**: A text input field.
- GEOGRAPHICAL AREA NAME**: A text input field.
- SETTING**: A radio button group with three options: 'urban', 'rural', and 'semi urban'.
- NUMBER OF PEOPLE BEFORE THE DISASTER**: A text input field.

The End



A project by the



International Federation
of Red Cross and Red Crescent Societies

Acknowledgements

UNHCR

OCHA

REACH

Terre Des Hommes

MapAction

CartONG

Harvard Humanitarian Initiatives

KoBoToolbox Help Centre