Kobotoolbox Tutorial

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Introduction

This tutorial will guide you through the first steps for using KoboToolbox, from creating an account, generating a form with different types of questions, collecting data online and offline, exporting and visualizing data.

What is Kobotoolbox?

KoboToolbox is an open source platform for the collection, management, and visualization of data. As the most widely used primary data collection tool in the nonprofit sector, it is the tool of choice for over 14,000 social impact organizations worldwide.

☑ KoboToolbox

Kobotoolbox features

- Build questionnaires in the web or using XLSForm
- Translate questionnaires into multiple languages
- Create a questions library

- Collect data offline or online in multiple devices (mobile phones, tablets, laptops)
- Visualize data in maps and reports
- Download data in multiple formats (XLS, CSV, KML, ZIP, GeoJSON)
- Share and collaborate on projects

Getting started in KoboToolbox

1. Create an account

- 1. Go to https://www.kobotoolbox.org/sign-up/
- 2. Select 'Global KoboToolbox Server'
- 3. Enter the required information in the form and click on create account.

Global Server
High quality data collection tools for social impact organizations working in challenging environments.
For organizations that prefer data hosting in the European Union, please create an account on the EU-based server.
Get started by creating a free account on our Community Plan, which includes unlimited projects, unlimited data collectors and collaborators, 5,000 submissions per month, and 1GB of file storage.
For more data collection, file storage, and features, get in touch to upgrade your plan.

2. Login to KoboToolbox

- 1. Go to https://kf.kobotoolbox.org/account/login
- 2. Enter your username and password

	lbox
Username	of the the
fmvaldezg	
Password	1
LOGIN	
Create an account	Forgot password?
	The second

My Projects Dashboard

In the My Projects View you will find all your projects listed. You can see on the left side a list of the Status of your projects just below the 'New' button. On the upper right you will find three option to apply to your projects: archive, share or delete.



Creating a new questionnaire

- 1. Login to your account (see step 2 on previous section)
- 2. On the *My Projects* view, click on New
- 3. Select the option Build from scratch

Create project	: Choose a source		×
Choose one of the	e options below to continue. You will be p	prompted to enter name and other deta	ils in further steps.
	Build from scratch	T Use a template	
	Upload an XLSForm	© Import an XLSForm via URL	

4. Enter a title for your project, along with a sector and a country. Then click on Create Project.

Project Name (required)			
Enter title of project here Your proje	ct title here	9	
Description			
Enter short description here A descri	ption for yo	our project here	
Sector (required)		Country (required)	
Select	~	Select	\sim

5. Start adding new questions by clicking on the 🕒 button and then Add a question.

6. We are going to add a Select One type question by clicking over the first option.

			^	
0	Select One	i≡ Select Many	abc Text	123 Number
1.0	Decimal	Date Date	Time	Date & time
۰	Point	Photo	🛋 > Audio	Video
<	Line	≡ Note	Barcode / QR Code	Acknowledge
•	Area	E Rating	Question Matrix	↓ , Ranking
1+1	Calculate	X Hidden	File File	11 Range
Pa	External XML			

7. In the new question, you will have a space to add the question prompt, a hint on how to re-

ł	_ New Question Question hint	Hint text
ā	Option 1	
亩	Option 2	
	+ Click to add another response	Response options

spond and a list of options to respond the question.

8. Once you are done creating questions, you can click on ______ button located on the upper right corner of the screen.

SAVE

9. Click on the Return to list button located on the upper left corner to go back to the dashboard

6

Deploying and sharing a questionnaire

1. Preview your questionnaire:

Once you are done creating the questionnaire, you might like to preview it. To do so, click on the name of your project on the list in the dashborad.

ßκ	obo Toolbox	Q Search							•
	NEW	My Projects	∓ filter	⊞ fields					i : i
		 Project name 			* Status	* Owner		- Date deployed	* Submissions
		Infrastructure)		R deployed	me	Today at 3:37 PM	Today at 3:30 PM	0
		Who are we?			R deployed	me	October 25, 2023	October 25, 2023	3
		Field collection			by deployed	me	April 11, 2023	February 22, 2023	4

You will see a summary of the project, displaying the description, the project status, number of questions, the owner, last time modified and deployed. Also, on the bottom of the page you will see a chart and statistics of the submissions.

To preview your questionnaire, click on **Preview form** on the Quick Links menu on the right of the screen.

Θĸ	xodlooT odo	Infrastructure	0 submissions
Ш iii	NEW	SUMMARY FORM DATA SETTINGS Project information Quick Links Description Image: Collect data Image: Collect data Image: Share project Status Questions Questions Owner Image: Collect data Image: Share project Image: Status Questions Questions Owner Image: Collect data Image: Share project Image: Collect data Image: Share project Image: Collect data Image: Share project Image: Collect data Image: Collect data Image: C	> > > >
00		Submissions Fast 7 days Past 31 days No chart data available for current period. 0 Nov 1, 2023 - Nov 7, 2023 0	

A temporary popup windows will show a complete functional version of the form. You can fill up the questions, but the responses will not be loaded to your project.

2. Deploy the questionnaire

Deploying your form is needed to make it available to the public, or to those who will be filling the form in the field.

To deploy the form, click on FORM menu on the top of the screen, next to SUMMARY. Then, click on the DEPLOY (or REDEPLOY if you made changes to the form) button.

Θĸ	obo Toolbox		0 submissions 🕞
Ē	NEW	SUMMARY FORM DATA SETTINGS	
		Current version	r o (j …
		If you want to make these changes public, you must deploy this form.	
		v2 (undeployed) Last Modified : Today at 3:37 PM - 5 questions	REDEPLOY
		Languages: This project has no languages defined yet	•
		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.	

Remember to redeploy your form each time you made changes to the questions in order to see them in the form you are sharing.

3. Preparing the for before data collection

Before starting to collect data, you will want to set up the mode of collection. In the same window FORM, under the section Collect data you will see a drop-down menu with multiple options. Select the one that best adapts to the type of collection you will be doing. In this case, we will set it on Online-Offline (multiple submissions) as we want to collect data without being connected to the internet.

C Ka	xodlooT od c	Infrastructure					0 submissions
Ē	NEW		SUMMARY	FORM	DATA	SETTINGS	
		Current version					/ o fj …
		If you want to make these changes public, y	ou must deploy this	form.			
		v2 (undeployed) Last Modified : Today at 3:37 PN	1 - 5 questions				REDEPLOY
		Languages: This project has no languages defined yet					
		Collect data					
		Online-Offline (multiple submission)	·				COPY OPEN
		This allows online and offline submissions and is	the best option for c	ollecting data in t	he field.		

Now, to start collecting the data you can simply click on the COPY button to copy the URL of your form. You can share this url with the people that will be adding entries to the form.

Or you can click on OPEN to open the form from the browser on the device you are using.

Collecting data on a mobile device

1. Once you open the URL of the form, if the form includes a location question, you will see a message asking to provide access to location services. Be sure to allow access if you want to be able to use the location of your phone in the form.

📶 Mint 奈	3:58	РМ 1	@ 🖉 98% 🚺						
0	C KoboToolbo	X							
	Infrastr	ucture							
*Typ	*Typ "ee.kobotoolbox.org" would like to use your current location. This website will use your precise location because "Safari" currently has access to your precise location.								
C	Don't Allow	Allow							
0 5	tairs								
00	Other								
AA	🔒 ee.kobot	oolbox.org	Ċ						
<	> 1) []	C						

2. Fill out the questions as needed.

alli	Mint 🗢 4:01PM	@ @ 98% 🛃
*	Type of infrastructure	
	 Building 	
	C Light pole	
	O Bench	
	O Food Truck	
1	O Stairs	
]	O Other	
	Name	
	Charles Library	
*	Point and shoot! Use the camer photo	a to take a
	AA 🔒 ee.kobotoolbox.org	5

3. If there is a location question on the form. Click on the record the current location icon.



Il Mint 🗢	4:01PM	@ @ 98% 💋
*Record you	current location	1
	¢	
latitude (x.y	°)	
39.98245		
longitude (x.	y°)	
-75.155464	ļ.	
altitude (m)		
	38.41	25137329101!
accuracy (m)	26.42	87705695430
筪		
	A Cours Durch	
	ee.kobotoolbox.org	1

4. Once you are done filling the questions, and you get to the bottom of the form, click on Submit form.

al Mint 🗢	4:02 PM	@ 0 98% 📢
-75.155	464	
altitude (m)	38.	4125137329101!
accuracy (m	26.	4287705695430
Ŵ		
]	8 Save Dra	ift 🚯
	🗸 Submit	t 1
	Powered by EM	IKĚTO
	ee.kobotoolbox.	org

Collecting data offline

Before going to the field or while you are still online, be sure to follow these steps:

1. Open the form using the URL when you are still online.

- 2. To bookmark the form, if you are using an iPhone, click on the Share option
- $3.\ {\rm Click}\ {\rm on}\ {\rm Add}$ to home screen.

•1	Mint 穼	3:10 PM	@ 🖉 81% 🛃
	C	Infrastructure ee.kobotoolbox.org Options >	×
			Maps
	Сору		Å
	Add t	o Reading List	00
	Add E	Bookmark	m
	Add t	o Favorites	\mathfrak{L}
	Add t	o Quick Note	m
	Find o	on Page	Ę
	Add t	o Home Screen	Ð
	Mark	qu	8
	Print		ā

4. You will see an icon created on your home screen with the name of your form Warning! Do not clear you internet browser history if you are collecting data offline. Well done! Always use the homescreen shortcut you just created to open the form.

- 5. Fill out the form as needed and then click on the Submit button.
- 6. Since you are offline, you will see a message Record queued for submission.

12:54 🕇	≁ 📧		
Record queued for submission.			
Queued records, except thos draft, are uploaded automatii background, every 5 minutes page is open and an Internet available.	e marked as cally, in the when the web connection is		
9	ОК		
)			
latitude (x.y °)			
longitude (x.y °)			
altitude (m)			
accuracy (m)			
ee.kobotoolbox.org			

- 7. All data you fill and submit in the form while offline will be stored in your browser cache and remain in queue until you are back online.
- 8. You can see the queued records by clicking on the left edge of the screen. This will open a side panel like the one below, listing all records waiting to be uploaded.



- 9. Once you are back online, simply click on the Upload button. Although the form will try to upload every 5 minutes, it is a good practive to check the queued panel to be sure all records have been uploaded.
- 10. Alternatively, if you think you will not have connection soon and fear loosing your records, you can export the data and save it in your phone as a ZIP file.

12:55	≁ 📧		
Export Created			
Export file created for all unsubmitted records belonging to this form.			
Infrastructure_2024-10-2	3_ <u>12-54-58.zip</u>		
	ОК		
Upload	,		
Export			
Queued records, except those marked as draft <i>e</i> , are uploaded automatically, in the background, every 5 minutes when the web page is open and an Internet connection is available.			
To force an upload in between automatic attempts, click Upload.	hera to take a		
🖳 🕘 🔒 ee.kobotoolbo	ox.org Č		
< > ট			

11. To do so, simply click on the $\tt Export$ button on the queued panel and then click $\tt OK$ when the file is created.



12. Then click on Download and your ZIP file will be saved in you device. This file contains a .xml file with every record.

Attribution

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