



KoboToolbox Training

For the SDG AI Lab Volunteers

Overview:

- Digital Data Collection Basics
- KoboToolbox Web Interface tour
- Designing and Deploying Forms
- Collecting and Managing Data

Friday, December 13, 2024

Digital Data Collection

KoboToolbox is a free and open-source data collection platform designed for humanitarian, development, and research purposes, enabling users to collect and manage field data efficiently.

Two main modes of data collection

- Web Surveys (Browser Based)
- Mobile Forms (Android Based)

Feature	Web Surveys	Android App
Internet Dependence	Requires internet connection	Works offline, syncs later
Device	Any web-enabled device	Android devices only
Target User	Direct respondent input	Enumerator-mediated collection
Use Case	Broad, dispersed respondents	Field data collection
Multimedia Geospatial Input	Limited (depends on browser)	Rich multimedia support

Web surveys are ideal for self-administered questionnaires and respondents with consistent internet access.

Webapps are better suited for structured, enumerator-led fieldwork in remote or offline environments.

KoboToolbox is based on ODK, the difference is in the pricing structure and the date of release for new features.

Only KoboToolbox offers a free plan to nonprofit organisations but be conscious of limits imposed on this plan (number of submissions, file storage).

	Category	Monthly Cost	Submissions	Automatic speech-to-text transcription	Machine translation of transcripts	File Storage
KoboToolbox (Nonprofit)	Community	Free	5000 /month	10 minutes/month	6000 characters/month	1 GB
	Professional	US\$ 129.00	25000 /month	120 minutes/month	72000 characters/month	Unlimited
	Enterprise	Custom	Custom	Custom	Custom	Unlimited
KoboToolbox (Other)	Starter	US\$ 24.00	1000 /month	5 minutes/month	3000 characters/month	0.5 GB
	Community	US\$ 88.00	5000 /month	10 minutes/month	6000 characters/month	1 GB
	Professional	US\$ 166.00	25000 /month	120 minutes/month	72000 characters/month	Unlimited
	Enterprise	Custom	Custom	Custom	Custom	Unlimited
ODK	Standard	US\$ 199.00	10000 /month			Unlimited
	Professional	US\$ 499.00	25000 /month			Unlimited
	Enterprise	Custom	Custom			Unlimited

KoboToolbox Web Interface

Main page “My Projects”

The screenshot shows the KoboToolbox web interface. At the top left is the KoboToolbox logo and a search bar. Below the logo is a sidebar with a 'NEW' button and three categories: 'Deployed' (3 items), 'Draft' (1 item), and 'Archived' (0 items). The main content area is titled 'My Projects' and contains a table with the following columns: Project name, Status, Owner, Date modified, Date deployed, and Submissions. The table lists several projects, including 'Introduction Training for the 2010-11 Lab Network', 'Kobo Toolbox Training', 'Survey', and 'Test Project 1'. A callout box points to the 'NEW' button, and another callout box points to the first project name in the table.

Project name	Status	Owner	Date modified	Date deployed	Submissions
Introduction Training for the 2010-11 Lab Network	Deployed	me	Yesterday at 11:55 AM	December 5, 2010	0
Kobo Toolbox Training	Deployed	me	Last Wednesday at 4:...	December 5, 2010	0
Survey	Deployed	me	December 5, 2010	December 5, 2010	0
Test Project 1	Deployed	me	Today at 11:55 AM		0

Create a new Project (Form)

Click on form name to drill down to form specific information

Form page has four tabs

- Summary
- Form
- Data
- Settings

KoboToolbox Kobotoolbox Training for the SDG AI Lab Volunteers Session Scheduling 9 submissions R

NEW

Deployed 3

Draft 1

Archived 0

SUMMARY FORM DATA SETTINGS

Project information

Description
-

Status	Questions	Owner
deployed	11	me

Quick Links

- Collect data >
- Share project >
- Edit form >

Demonstration of the four tabs and their various features

Summary Tab

- High-level information and quick links

Form Tab

- Upper right icons
- Deploy/Redeploy
- Collect data section
- Copy Button: Copies Form link to clipboard
- Open Button: Opens/previews form in Enketo
- Anonymous submissions

Data Tab

Settings Tab

- General
- Media
- Sharing
- Connect Projects

Designing and Deploying Forms

There are four options to create a new form

- From Scratch (using Form Builder)
- Using a Template
- Uploading an XLSForm
- Importing and XLSForm from a URL

Form Builder

- 25 Types of questions supported
- Questions can be grouped
- Questions can be cascaded
- Layout and settings can be adjusted

Based on a scenario, a demonstration of how to build, preview, deploy and collect data using a browser-based form.

XLSForms Overview

Collecting and Managing Data

Data Collection

- Using KoboCollect (Mobile App)
- Using Enketo web forms

Data Management and Analysis

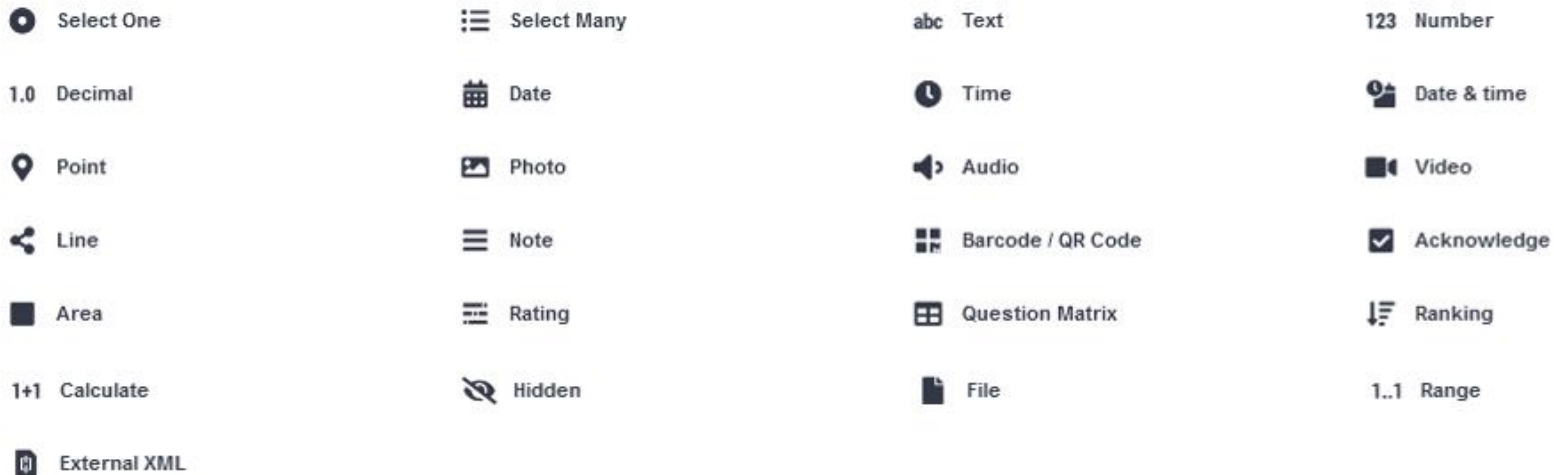
- Data Tab
 - Table
 - Reports
 - Gallery
 - Downloads
 - Map

Other Items

- Library and Public Collections
- Best Practices
- Online Resources

Form Design Scenario

Question Types:



Survey of favourite food based on age:

Questions:

- Location (Point)
- Name (Text)
- Birth Date (Date)
- Age (Calculate)
- Favourite Fruits (Select One – with images)
- Dinner (Photo)

Example form: Survey of favourite food:

Location (Point)

- Mandatory: Yes

Name (Text)

- Mandatory: Yes

Birth Date (Date)

- Mandatory: No

Age (Calculate)

- Calculation: $\text{round}((\text{today}() - \{\text{birthday}\}) \text{ div } 365,2)$

Fruits (Select One – with images)

- Mandatory: Yes
- Options: Apples / Bananas / Oranges

Dinner (Photo)

- Mandatory: No

Adding Photos to questions in form:

Download XLS of form

Open in Excel and add media::images column to choices

Replace form with changes

View Form – no images

Upload images

Redeploy

Open form (refresh browser)

View form with images

Synchronous link to Excel :

- **Generate a named export**
- **Get asset UID of the project**
 - (https://kf.kobotoolbox.org/#!/forms/{asset_uid}/data/downloads)
- **Open the Asset Export Settings**
 - (https://kf.kobotoolbox.org/api/v2/assets/{asset_uid}/export-settings/)
- **Locate the URLs, data_url_csv and data_url_xlsx**
- **In Excel create a new “From Web” data source using the data_url_xlsx and your authentication if required**

Exported data is only refreshed every 5 minutes

Exports must be completed within 2 minutes otherwise they will fail

Best Practices:

- **Plan form design rather than jumping into the technology**
- **Design forms from a user's point of view**
- **Avoid free text for any inputs that are quantitative or categorial**
- **Use advanced features (Skip Logic, Constraints, etc)**
- **Use Media (Images, Videos, and Audio)**
- **Use GPS**
- **Test forms in field conditions**
- **Train users on the form UAT and provide documentation**
- **Be conscious of sensitive data and data security**
- **Create forms in an iterative fashion of continual testing**

On-Line resources:

KoboToolbox Help

<https://support.kobotoolbox.org>

KoboToolbox Forum

<https://community.kobotoolbox.org>

ODK Help

<https://docs.getodk.org>

ODK Forum

<https://forum.getodk.org>

XLS Help

<https://xlsform.org/en>

Synchronous link to Excel (in KoboToolbox Help)

https://support.kobotoolbox.org/pulling_data_into_excelquery.html

https://support.kobotoolbox.org/synchronous_exports.html

Often it may be best just to Google your question or any issues you may have to find answers. Many tutorials on KoboToolbox are also available on YouTube.