

# MEAL Capacity Strengthening Session: Orientation to Kobo Tool

21 February 2023 | Local Capacity Strengthening for Response  
(LCS4R)

2022 Feb 16



# Objectives for this training

- Understand the functionalities, benefits, and limitations of Kobo Toolbox for mobile data collection and management
- Learn how to develop a form using the Kobo interface
- Learn the steps to implement a data collection project on Kobo



Kobo Toolbox is a free and open-source toolkit for data collection and analysis

It allows you to collect data in the field using mobile devices such as mobile phones or tablets, as well as with paper or computers.

<https://www.kobotoolbox.org/>



## Why Use Kobo?

Huge time saver! Bypass the step of manually entering results from paper to Excel

Improved data quality, through inbuilt controls on mobile forms

Widespread use of smart phones and availability of mobile internet

Greater possibilities for analysis and mapping

Quicker and more effective utilization of data



## Examples of when to use Kobo

Quantitative component of assessments

Baseline and endline surveys

KAP surveys

Post-distribution monitoring

Mapping services (e.g. health facilities, water points)

Surveillance and case finding (e.g. cholera outbreak)



## Pros

Provides full functionality without purchase and is highly usable

Accessible for NNGOs

Multiple question types

Data quality through constraints, skip patterns, etc.

Compatible with xls standard / ODK through import function

User-friendly interface to design surveys



## Limitations

no case management functionality

cannot track one participant in multiple projects/services

cannot track data over time easily

Few appearance options

calculation options limited

# Tutorial on using Kobo



# Create an account

Use this link:  
[https://kf.kobotoolbox.org/  
accounts/signup/](https://kf.kobotoolbox.org/accounts/signup/)

**Create an account**

**KoBoToolbox**

KoBoToolbox is an integrated set of tools for building forms and collecting interview responses. It is built by the Harvard Humanitarian Initiative for easy and reliable use in difficult field settings, such as humanitarian emergencies or post-conflict environments.

This instance of KoBoToolbox is hosted and supported by [UN OCHA](#) and can be used without limitations by any humanitarian organization. **Please sign up with your organization's email address.**

If you are not working for a humanitarian organization, please instead sign up at [the instance hosted by the Harvard Humanitarian Initiative](#).

You can also download and install KoBoToolbox on your own server or on your own computer.

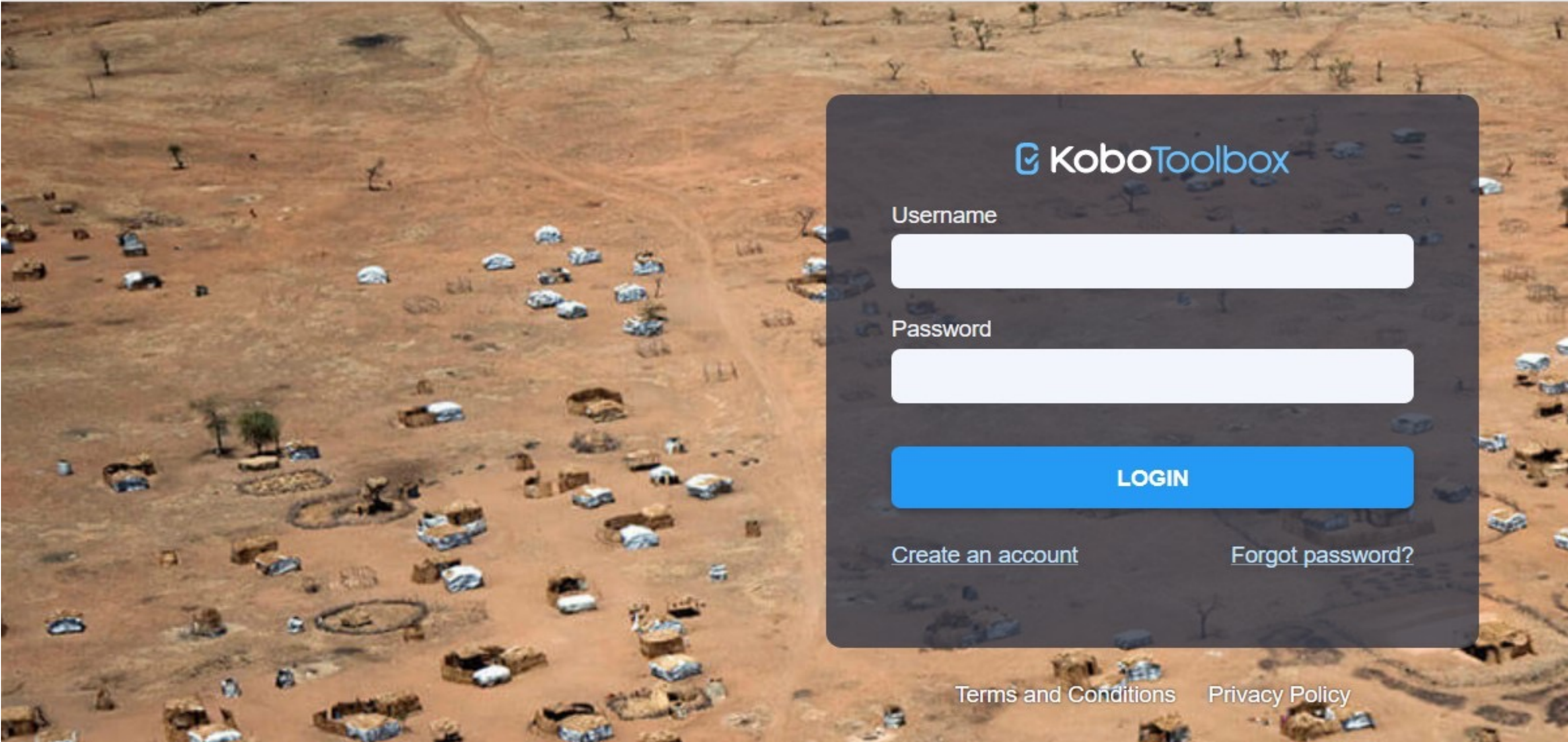
[Terms of Service](#) | [Privacy Policy](#)

**Create Account**

[or login](#)

# Log in

<https://kobo.humanitarianresponse.info/>



# Basic Layout

The screenshot displays the KoBoToolbox web interface. At the top left is the KoBoToolbox logo. A search bar labeled 'Search Projects' is located at the top center. A user profile icon with the letter 'J' is in the top right. On the left sidebar, there are navigation icons for a clipboard, a bar chart, and three circular icons at the bottom. The main content area is divided into two sections: 'Deployed' and 'Draft'. Each section contains a table of project entries.

**Deployed**

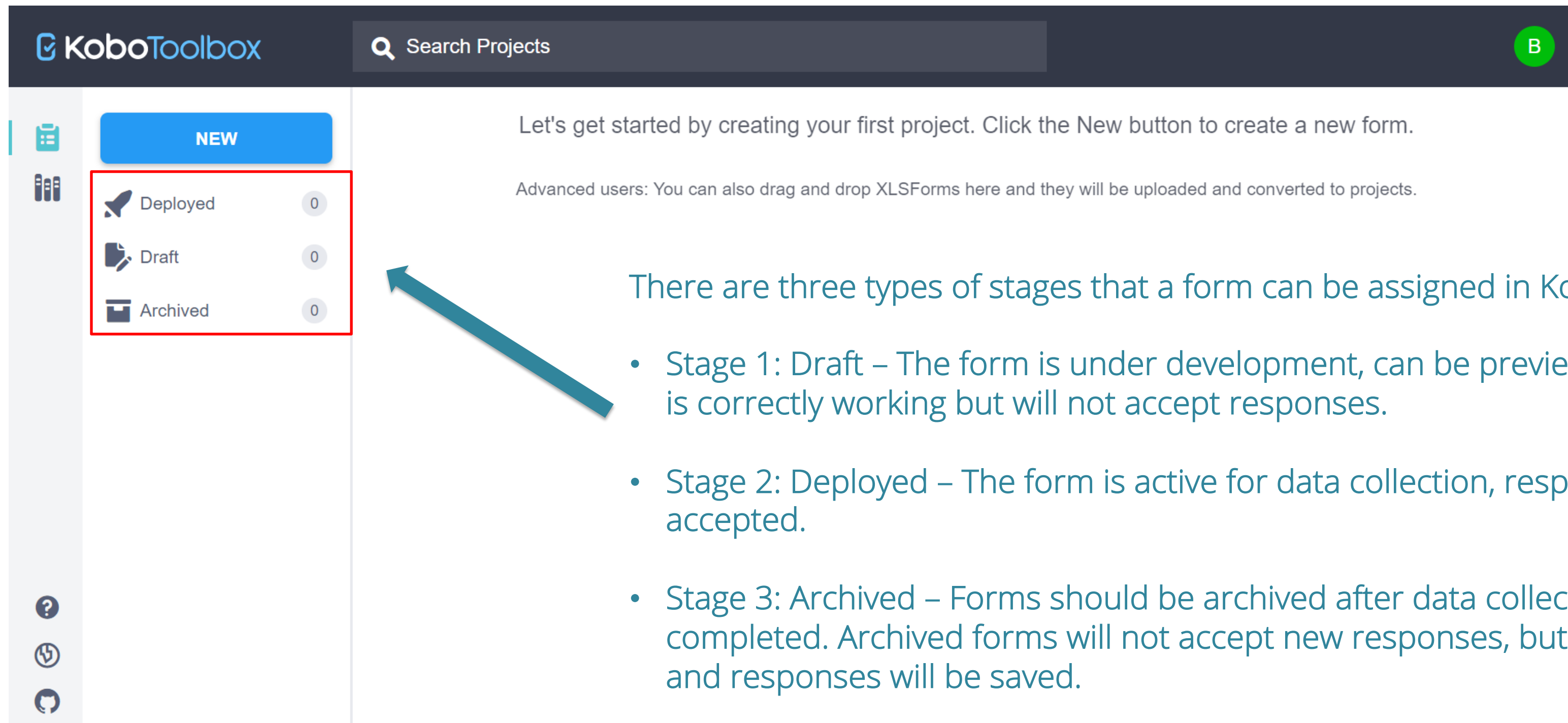
Name	Shared by	Created	Last Modified	Submissi...
Test		December 14, 20...	August 22, 2016	0
NFI Registration Borno Dec 2015		December 8, 2015	February 5, 2016	8

**Draft**

Name	Shared by	Created	Last Modified	Submissi...
Test3		December 16, 20...	December 16, 20...	0

On the left sidebar, there is a 'NEW' button and three filter options: 'Deployed' (2), 'Draft' (1), and 'Archived' (0). A purple chat bubble icon is visible in the bottom right corner of the interface.

# Types of form stages:



The screenshot shows the KoboToolbox interface. At the top, there is a dark header with the KoboToolbox logo on the left, a search bar labeled "Search Projects" in the center, and a green circular profile icon with the letter "B" on the right. Below the header, on the left side, there is a sidebar with a "NEW" button in a blue box. Below the "NEW" button, there are three items: "Deployed" with a rocket icon and a count of 0, "Draft" with a document icon and a count of 0, and "Archived" with a folder icon and a count of 0. These three items are enclosed in a red rectangular box. A teal arrow points from the text on the right towards this red box. The main content area on the right contains the following text:

Let's get started by creating your first project. Click the New button to create a new form.

Advanced users: You can also drag and drop XLSForms here and they will be uploaded and converted to projects.

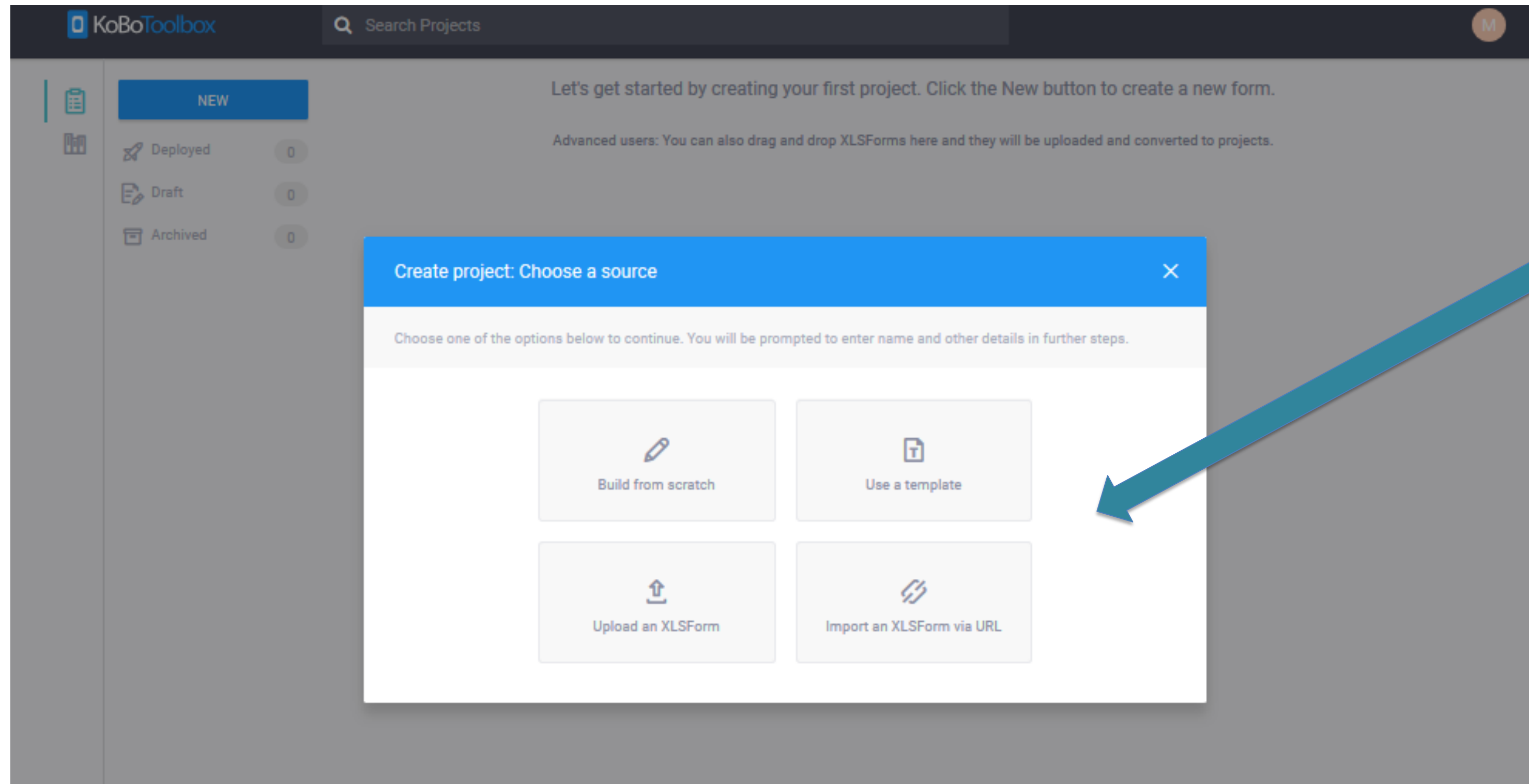
There are three types of stages that a form can be assigned in Kobo:

- Stage 1: Draft – The form is under development, can be previewed to test it is correctly working but will not accept responses.
- Stage 2: Deployed – The form is active for data collection, responses are accepted.
- Stage 3: Archived – Forms should be archived after data collection is completed. Archived forms will not accept new responses, but the form and responses will be saved.

# Building a form: Create a new project

The screenshot shows the KoBoToolbox web interface. At the top left is the KoBoToolbox logo. To its right is a search bar labeled 'Search Projects'. In the top right corner is a user profile icon with the letter 'M'. Below the search bar is a sidebar with a vertical list of options: 'NEW' (highlighted in blue), 'Deployed' (with a count of 0), 'Draft' (with a count of 0), and 'Archived' (with a count of 0). A teal arrow points from the text 'Click on "new" to create a new form' to the 'NEW' button. To the right of the sidebar, there is instructional text: 'Let's get started by creating your first project. Click the New button to create a new form.' and 'Advanced users: You can also drag and drop XLSForms here and they will be uploaded and converted to projects.'

# Building a form: Create a new project



The screenshot shows the KoBoToolbox web interface. At the top, there is a search bar and a user profile icon. On the left, a sidebar contains a 'NEW' button and three categories: 'Deployed' (0), 'Draft' (0), and 'Archived' (0). The main content area displays a message: 'Let's get started by creating your first project. Click the New button to create a new form. Advanced users: You can also drag and drop XLSForms here and they will be uploaded and converted to projects.' A modal dialog box titled 'Create project: Choose a source' is open, featuring a close button (X) in the top right corner. Below the title, it says 'Choose one of the options below to continue. You will be prompted to enter name and other details in further steps.' The dialog contains four buttons arranged in a 2x2 grid: 'Build from scratch' (with a pencil icon), 'Use a template' (with a document icon), 'Upload an XLSForm' (with an upload icon), and 'Import an XLSForm via URL' (with a link icon). A large teal arrow points from the right side of the slide towards the 'Use a template' button.

There are four types of sources you can use to create the form:

1. Build from scratch
2. Use a template
3. Upload an XLSform
4. Import an XLSform via URL

# Building a form: Create a new project

KoBoToolbox Search Projects M

NEW

Deployed 0

Draft 0

Archived

Let's get started by creating your first project. Click the New button to create a new form.

Advanced users: You can also drag and drop XLSForms here and they will be uploaded and converted to projects.

### Create project: Project details

Project Name  
Enter title of project here

Description  
Enter short description here

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

Sector Country  
Select... 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.

BACK CREATE PROJECT

Complete the following to create the project:

1. Project name
2. Description
3. Specify the sector
4. Specify the country

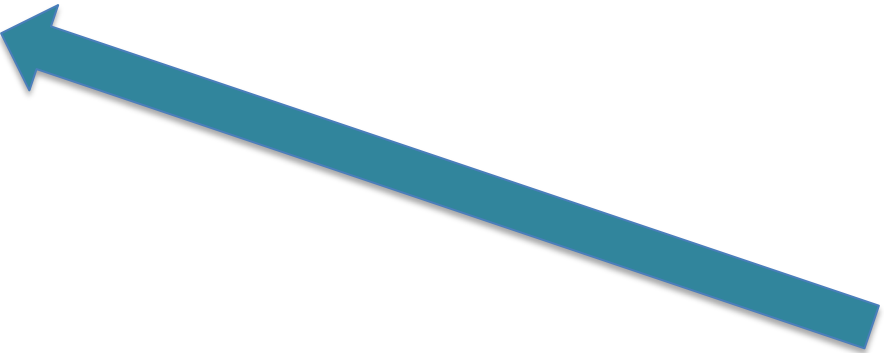
# Building a form: new project view

MET SAVE ×

Layout Search Library

METADATA:START TIME, END TIME

*This form is currently empty.  
You can add questions, notes, prompts, or other fields by clicking on the '+' sign below.*



Click here to add questions





# Building a form: question types

The screenshot shows the Kobo Toolbox form builder interface. At the top, there is a teal header with a clipboard icon, the text 'MET', a blue 'SAVE' button, and a close icon. Below the header is a toolbar with icons for visibility, copy, layout (with a dropdown arrow), and a search bar labeled 'Search Library'. The main area displays a grid of question types, each with an icon and a label:

Select One	Select Many	abc Text	123 Number
1.0 Decimal	Date	Time	Date & time
Point	Photo	Audio	Video
Line	Note	Barcode	Acknowledge
Area	Matrix / Rating	Ranking	1+1 Calculate










At the bottom right of the interface is a purple speech bubble icon.

•Remember: Kobo Toolbox can only create a form if your questions are answerable by what is in their platform.

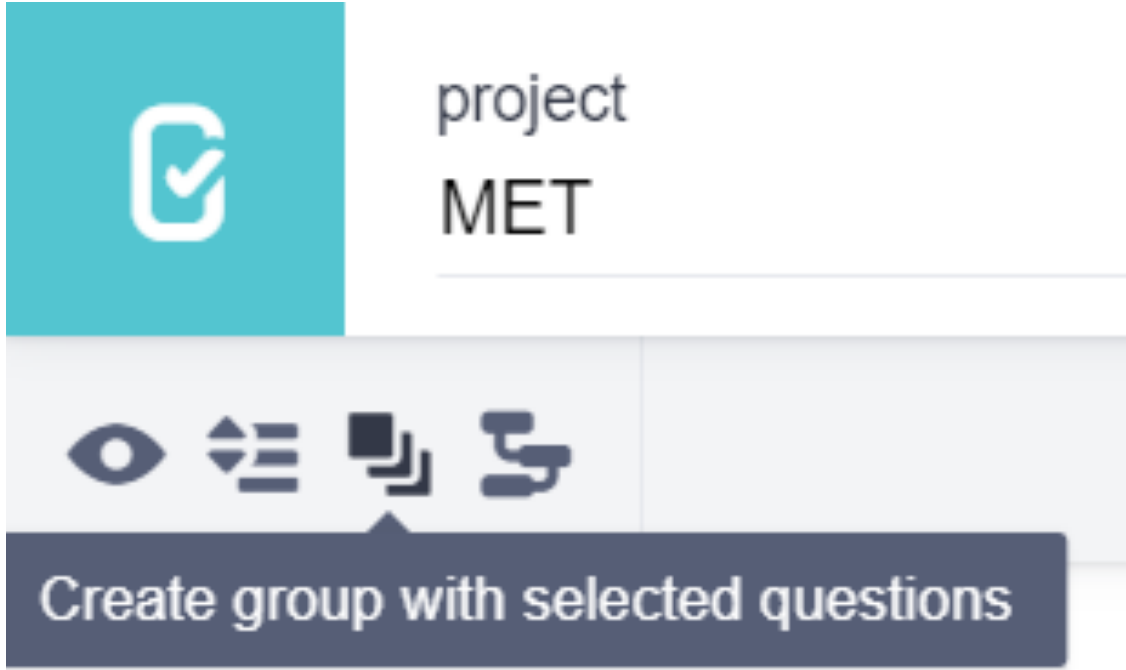
•Once you have finished your questionnaire, save the project. You can now deploy the project in Kobo Collect.

# Group questions













1. Hold SHIFT and multi select the questions you would like to group

123	How many children are here? <i>Question hint</i>	  
123	* How long have you been here? <i>Question hint</i>	  
<input checked="" type="radio"/>	▶ Are you aware of your rights and obligations? <i>Question hint</i>	  

2. Then press on "Create Group with selected questions"



3. Name the question group

▼ Household questions		  
123	How many children are here? <i>Question hint</i>	  
123	* How long have you been here? <i>Question hint</i>	  
<input checked="" type="radio"/>	▶ Are you aware of your rights and obligations? <i>Question hint</i>	  

# Form features to improve data quality

Require response

The screenshot shows a configuration window for a survey question. The question text is "\* Which region of the world are you from? (home country)" with a "Question hint" below it. The configuration panel on the left includes "Settings", "Question Options", "Skip Logic", and "Validation Criteria". The main configuration area includes:

- Data Column Name:** A text input field containing "region".
- Guidance Hint:** An empty text input field.
- Mandatory Response:** Three radio button options: "Yes" (selected), "No", and "Custom logic".

On the right side of the configuration panel, there are icons for settings, delete, copy, and share, along with a close button (X).

# Form features to improve data quality

Constrain values entered

The screenshot shows a form editor interface. At the top, a question is displayed: "123 Approximately how many networking events did you attend?" with a "Question hint" below it. On the right side of the question, there are icons for settings, deletion, and duplication. Below the question, a "Settings" panel is open, showing options for "Question Options", "Skip Logic", and "Validation Criteria". The "Validation Criteria" section is active and displays the text: "This question will be valid only if the following conditions apply" and "This question's response has to be >". A text input field next to the greater-than sign contains the number "0". On the right side of the validation criteria panel, there is a close button (X) and a delete icon (trash can).

# Form features to improve data quality

Use skip function to prevent illogical data

The screenshot displays a form configuration interface with two questions. The first question is "Are you a member (registered) of the GBV AoR Community of Practice?" with options "Yes" (XML value: yes) and "No" (XML value: no). The second question is "Where do you currently access/use the CoP?" with a note "(Please check all that apply to you.)". Below the second question, a "Settings" panel is open, showing "Skip Logic" selected. A rule is defined: "Are you a member (registered) of the GBV AoR Community of Practice?" equals "Yes". A teal arrow points to the gear icon in the top right of the second question's configuration area, and another teal arrow points to the "Skip Logic" option in the settings panel.

**Question 1:** Are you a member (registered) of the GBV AoR Community of Practice?  
*Question hint*

- Yes (XML value: yes)
- No (XML value: no)
- + Click to add another response... (XML value: AUTOMATIC)

**Question 2:** Where do you currently access/use the CoP?  
(Please check all that apply to you.)

**Settings**

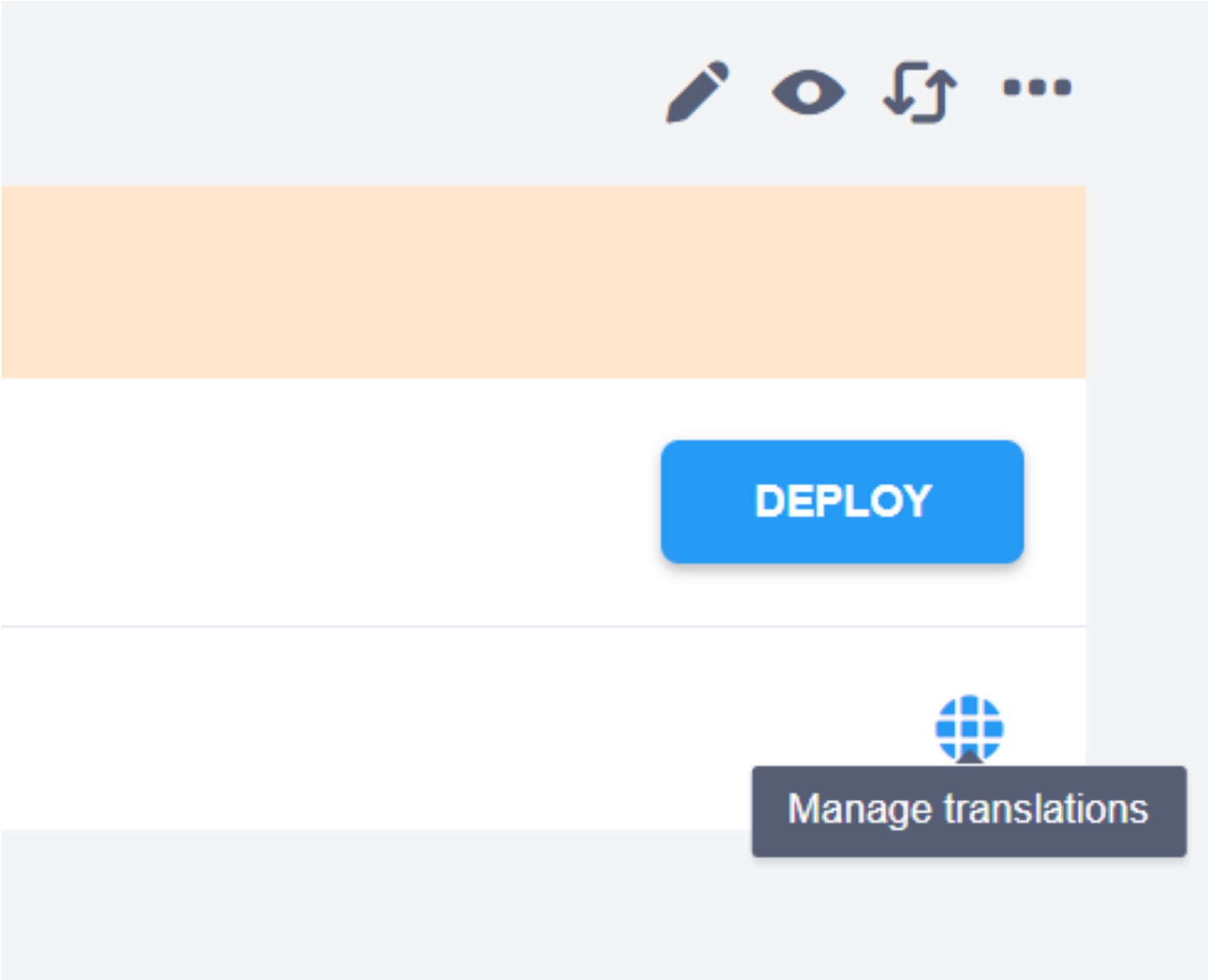
- Question Options
- Skip Logic**
- Validation Criteria

**Skip Logic Rule:** This question will only be displayed if the following conditions apply

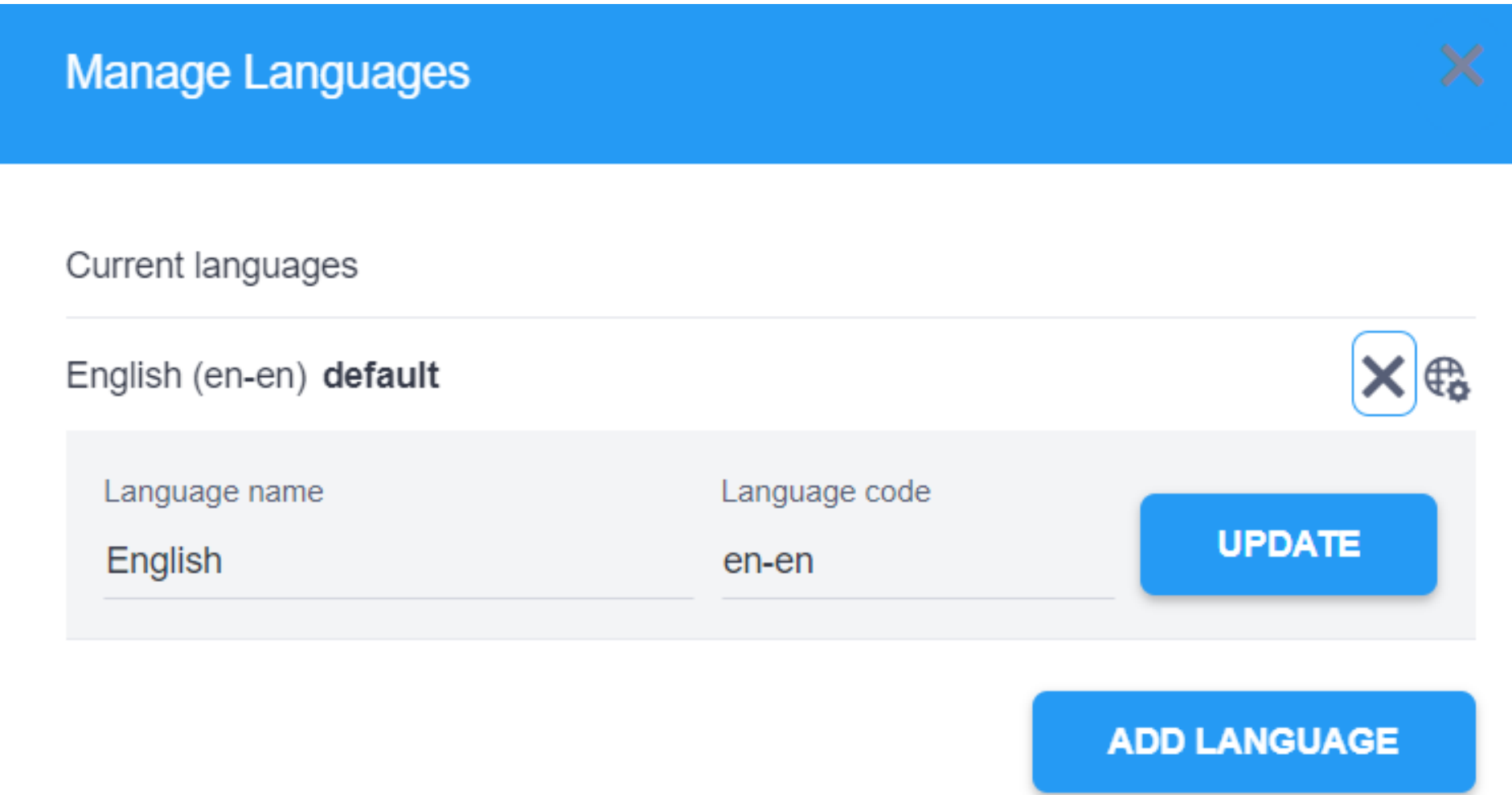
Are you a member (registered) of the GBV AoR Community of Practice? = Yes

# Translations / languages

1. Press on "Manage translations"



2. Set default language name and code i.e. English en-en



# Translations / languages

## 3. Add more languages as needed

Manage Languages
✕

Current languages

---

English (en-en) **default** ✎ 🌐

---

Arabic (ar-sy) ✎ 🌐 🗑️

---

Add a new language ✕

Language name  Language code  ADD

## 4. Add translations

Translations Table

Original string	✎ Arabic (ar-sy) translation
Household questions	أسئلة العائلة
How many children are here?	كم عدد الأطفال هنا؟
How long have you been here?	منذ متى وانت تعيش هنا؟
Are you aware of your rights and obligations?	هل لديك المعرفة عن حقوقك وواجباتك؟
Option 1	خيار رقم 1
Option 2	إختيار رقم 2

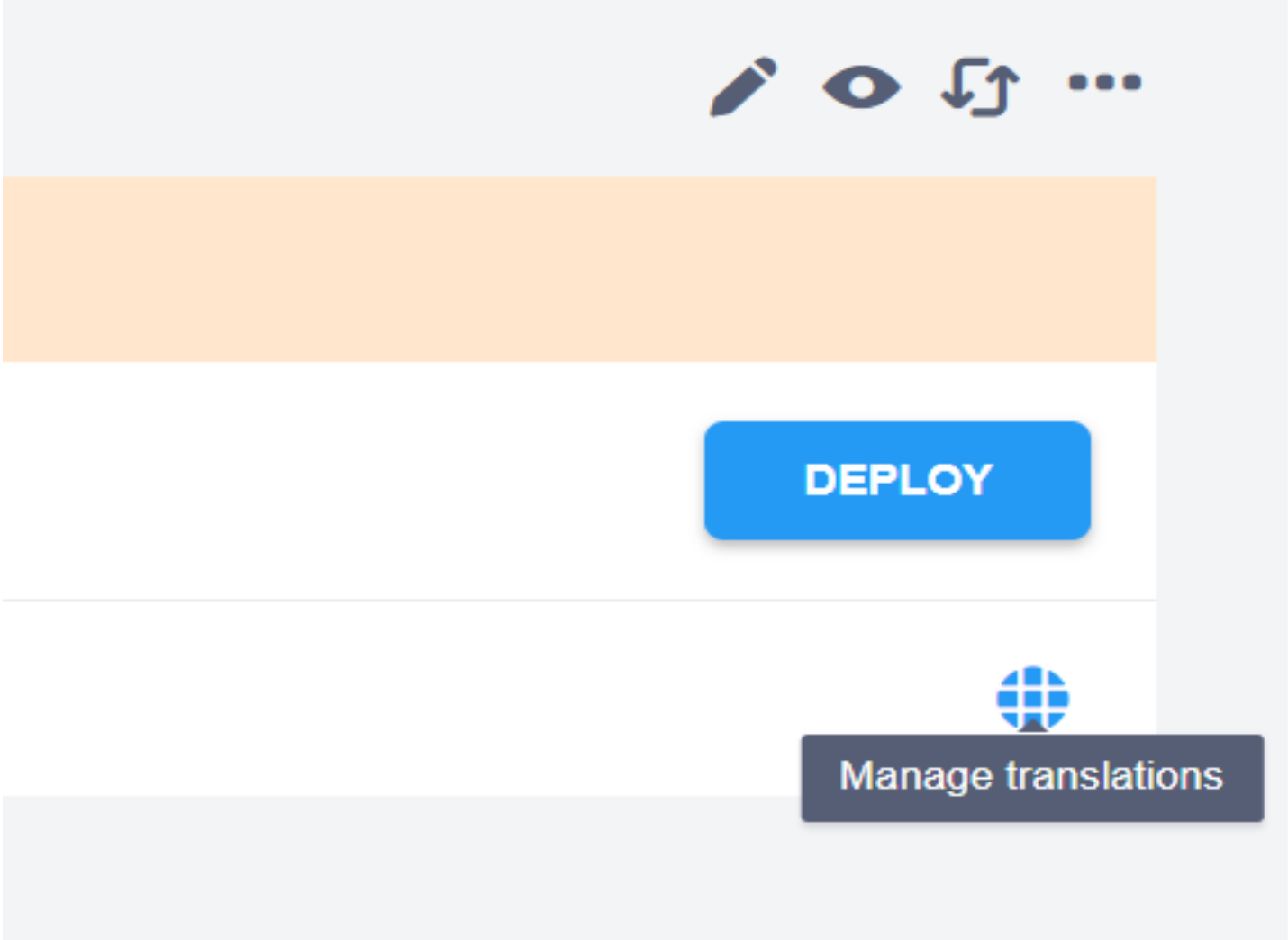
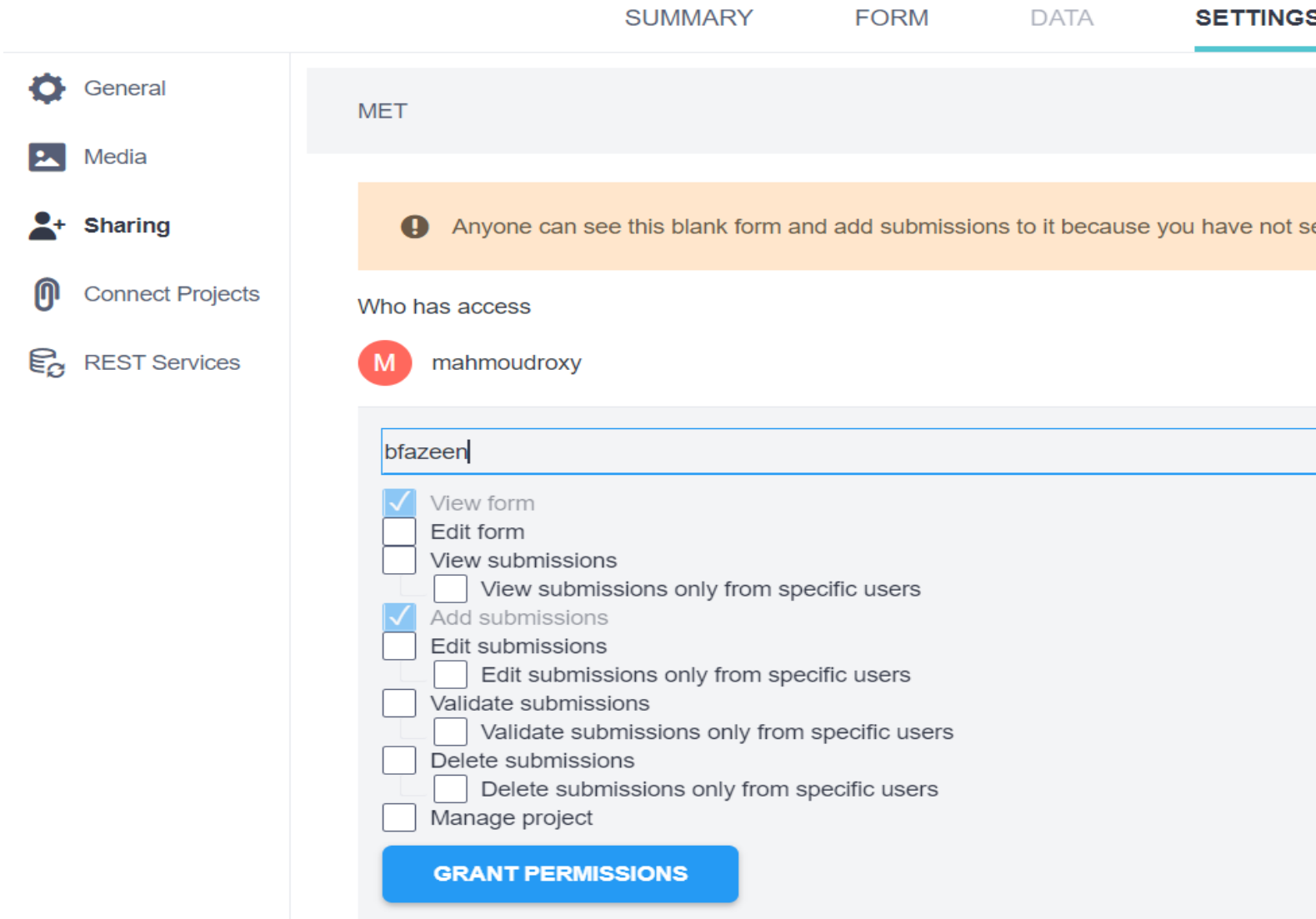
Prev
Page 1 of 1
Next

BACK
\* SAVE CHANGES

# Provide different levels of access and deploy a form


1. Choose the SETTINGS tab and add the Kobo username of the person you would like to give access. Setup form permissions as required and press grant permissions.

2. Once form is ready, press on "DEPLOY".








# Review dashboard where all forms exist

  J

**NEW**

-  **Deployed** 2
  - Relapse Study Caregiver Questionnaire
  - Gender Analysis Pilot Training - Participant Feedback Survey
-  **Draft** 1
  - MGBViE Alumni Survey
-  **Archived** 4

**Deployed**

Name	Shared by	Created	Last Modified	Submissions
Relapse Study Caregiver Questionnaire International Medical Corps' Malnutrition Relapse Study		April 14, 2022	February 9, 2023	673
Gender Analysis Pilot Training - Participant Feedback Survey		October 4, 2022	December 6, 2022	10

**Draft**

Name	Shared by	Created	Last Modified	Submissions
MGBViE Alumni Survey		Today at 11:35 AM	Today at 2:41 PM	0

# Ways to implement data collection in the field

- Kobo Collect or ODK are apps for data collection in resource-constrained environment, allows offline data collection
- Can only be used in phones or tablets using the Android Operating System
- Can be downloaded via Google Play

Kobo Collect

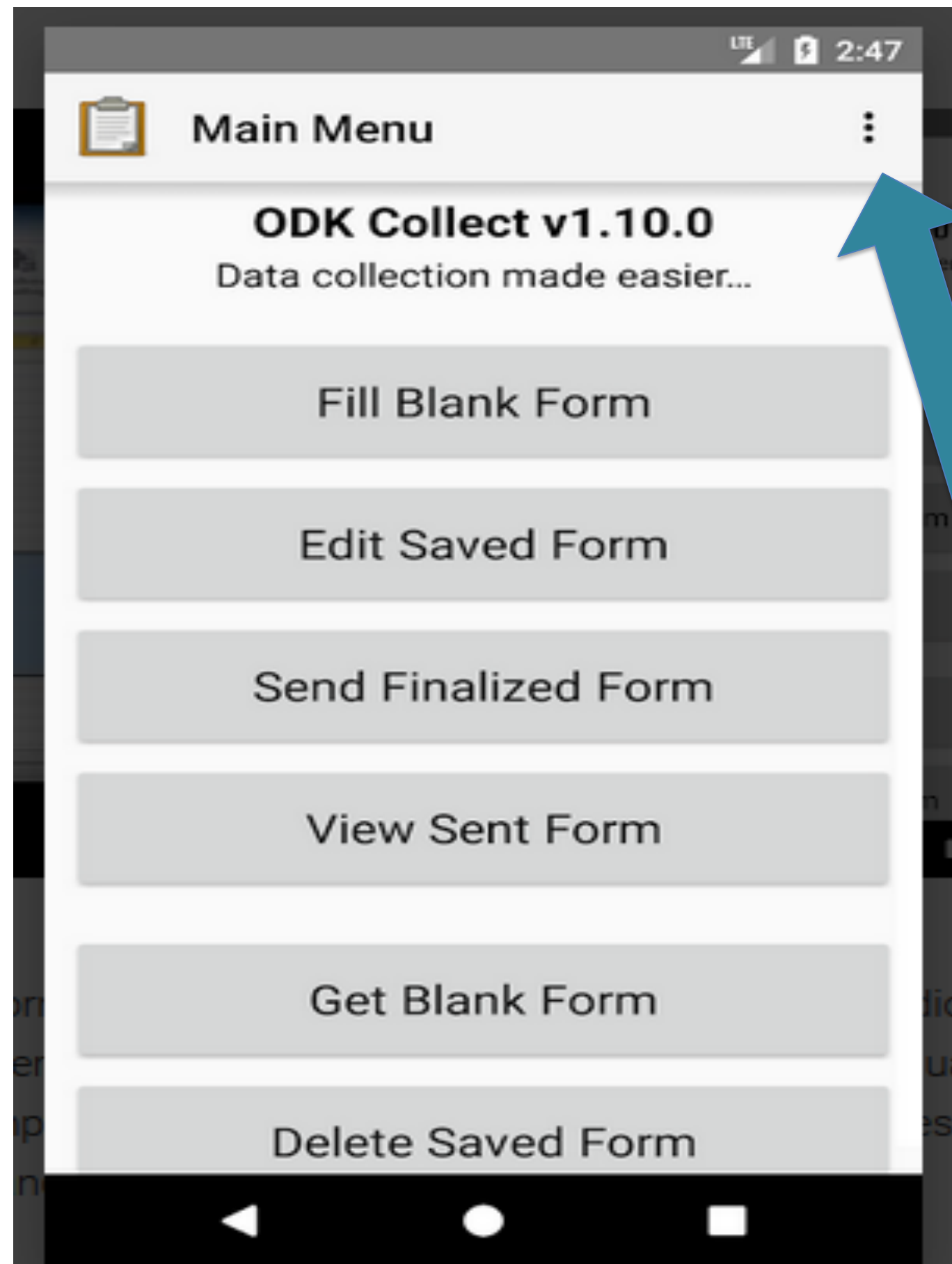


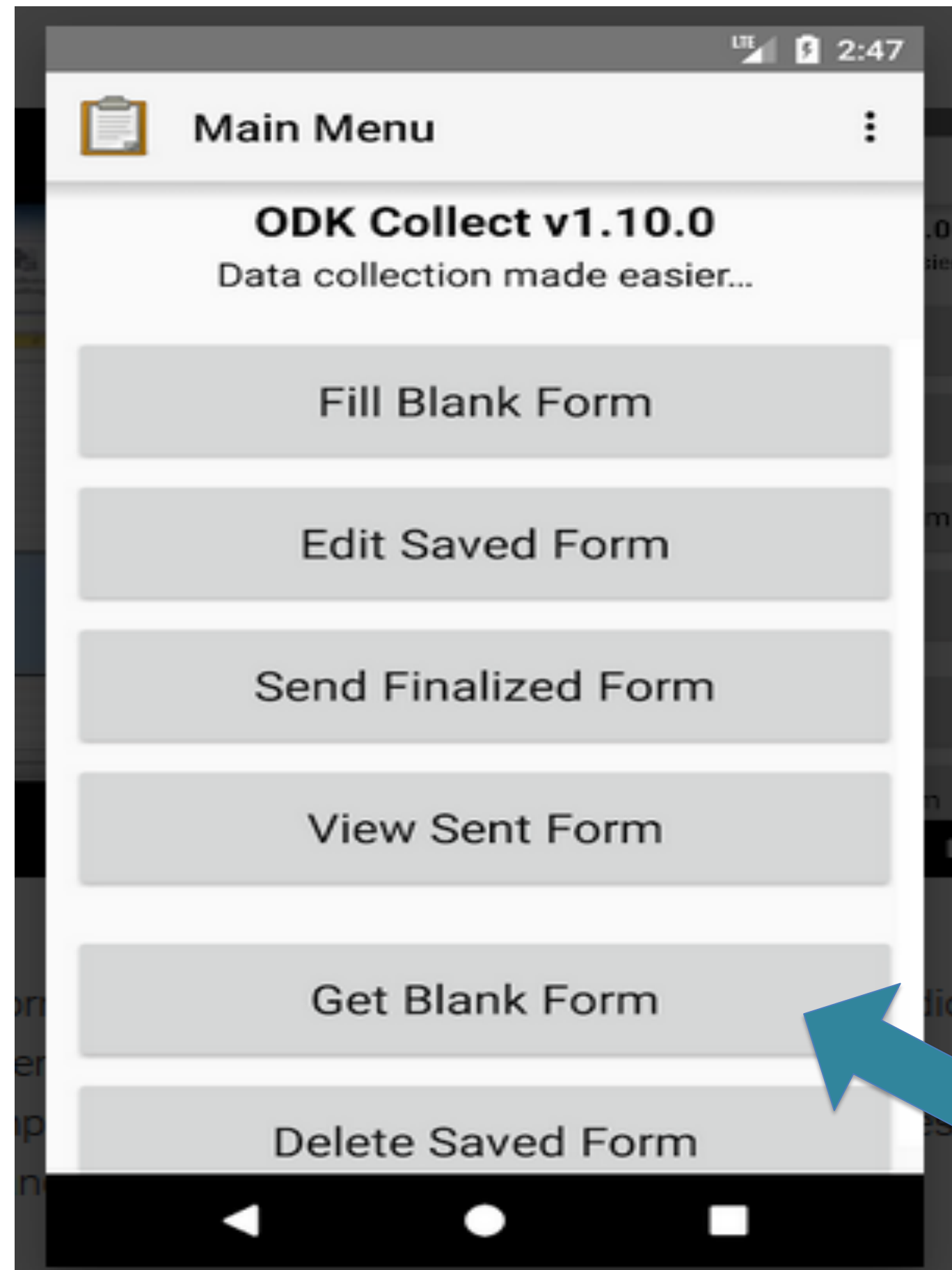
ODK Collect



# Installing application

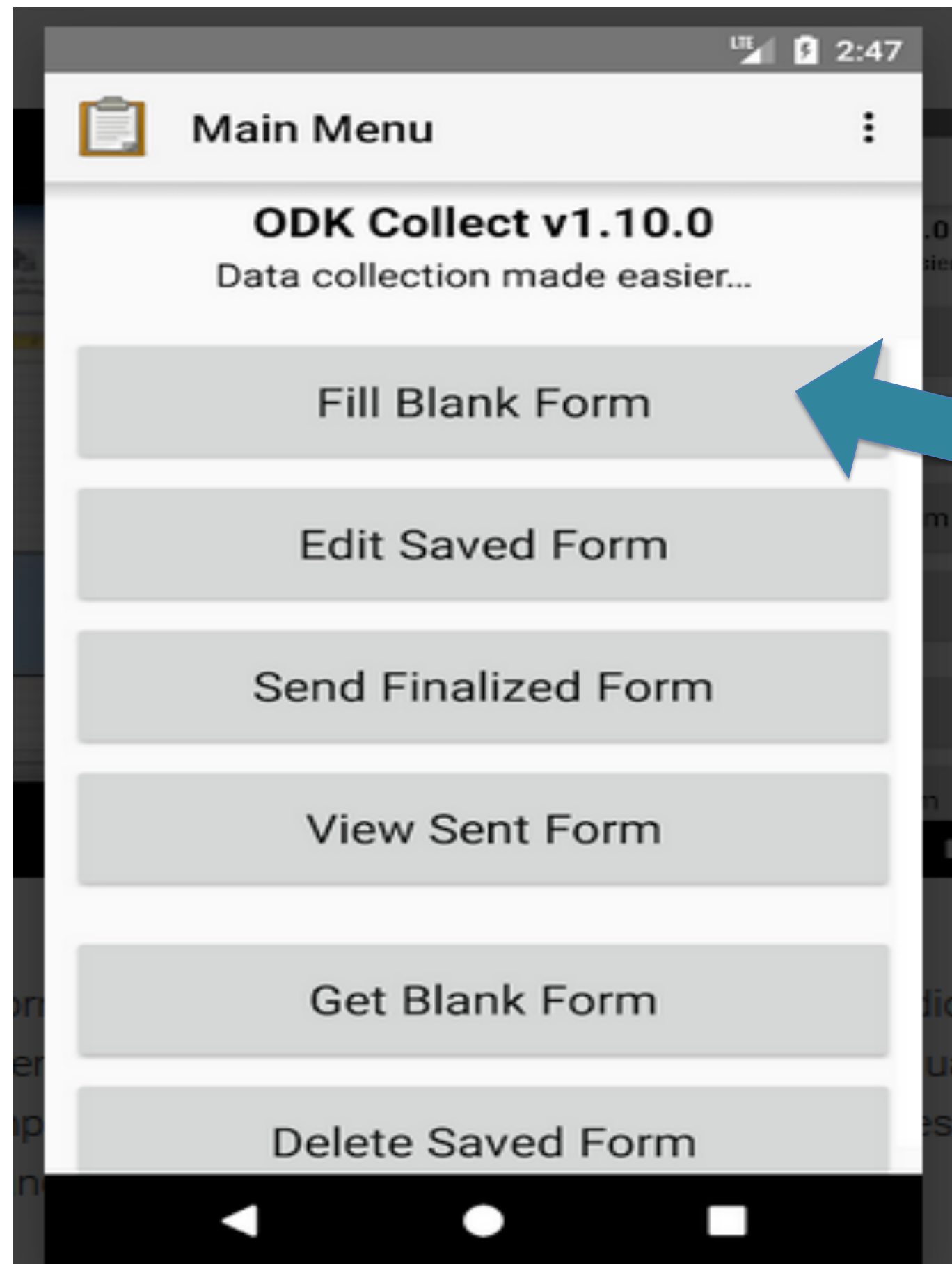
- Using your phone, go to your Applications and open Play Store.
- Search for KOBO COLLECT or ODK Collect
- Install Kobo Collect or ODK Collect on your phone.
- Once installed, open the application and look for the General Settings (you need to press the three dots on the side of your screen)





## Access forms on server

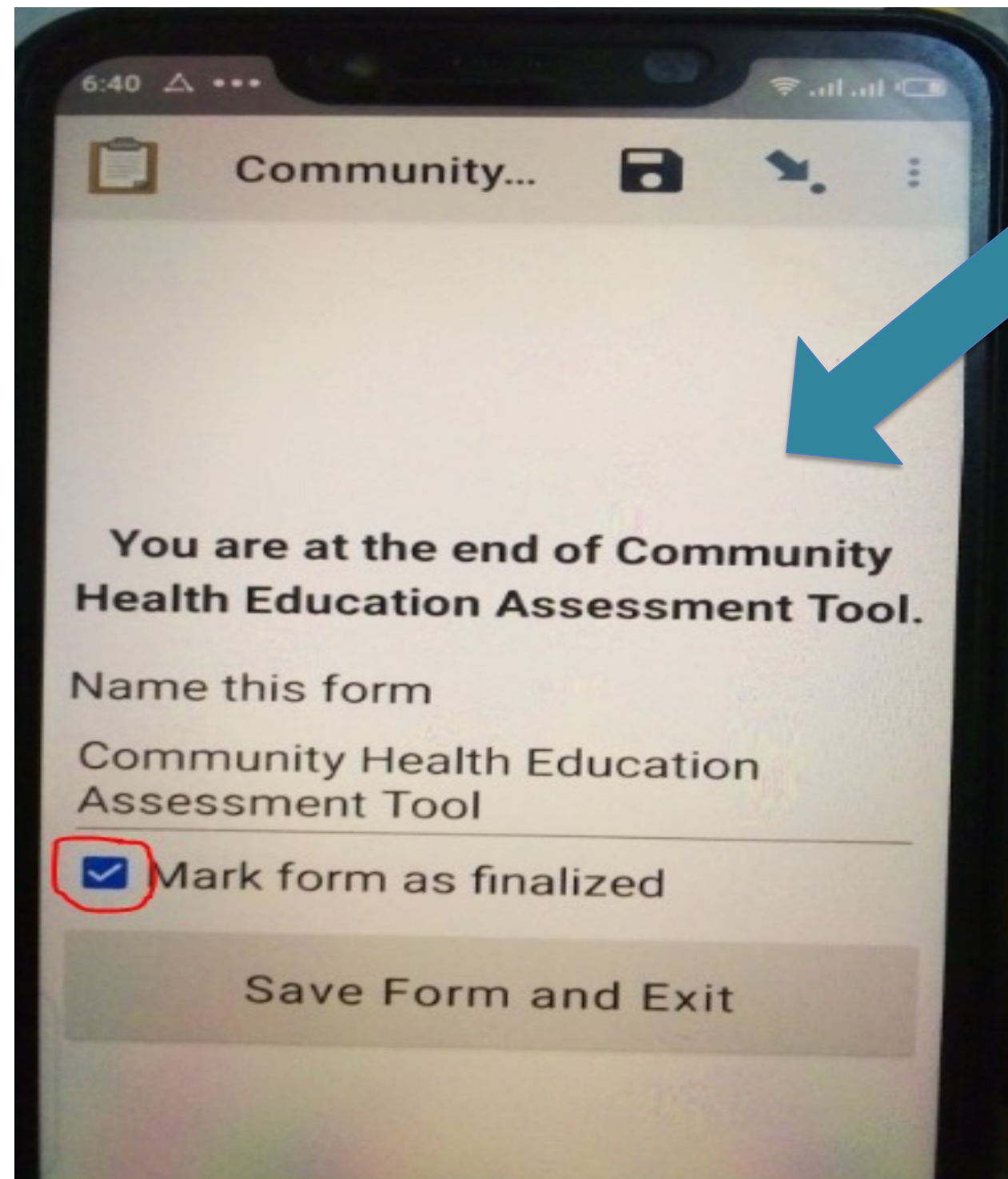
- In the General Settings page, click on the server and then enter
- URL:  
`http://kc.humanitarianresponse.info/yourusername.`
- Username: xxxxx
- Password: xxxx
- Go back to the main page (where you will see the form options).
- This will connect to the server to get deployed forms



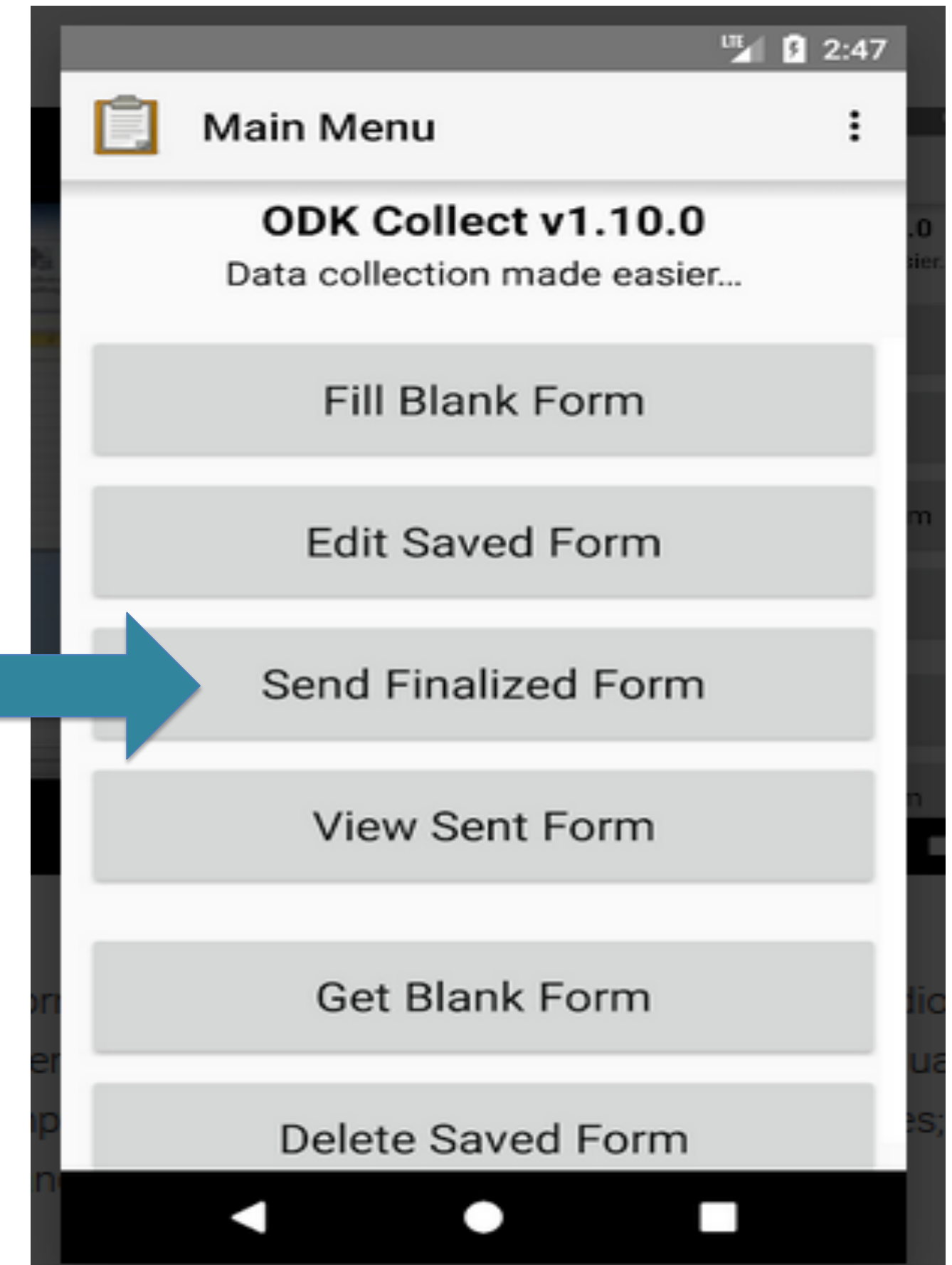
# Collect and save data

- To start collecting data, press FILL BLANK FORM and choose the form that you want to use.
- This will take you to the list of blank forms available in the server
- Once you are done in collecting the information, you will reach the last page which says **YOU ARE AT THE END THE FORM**

# Collect and save data



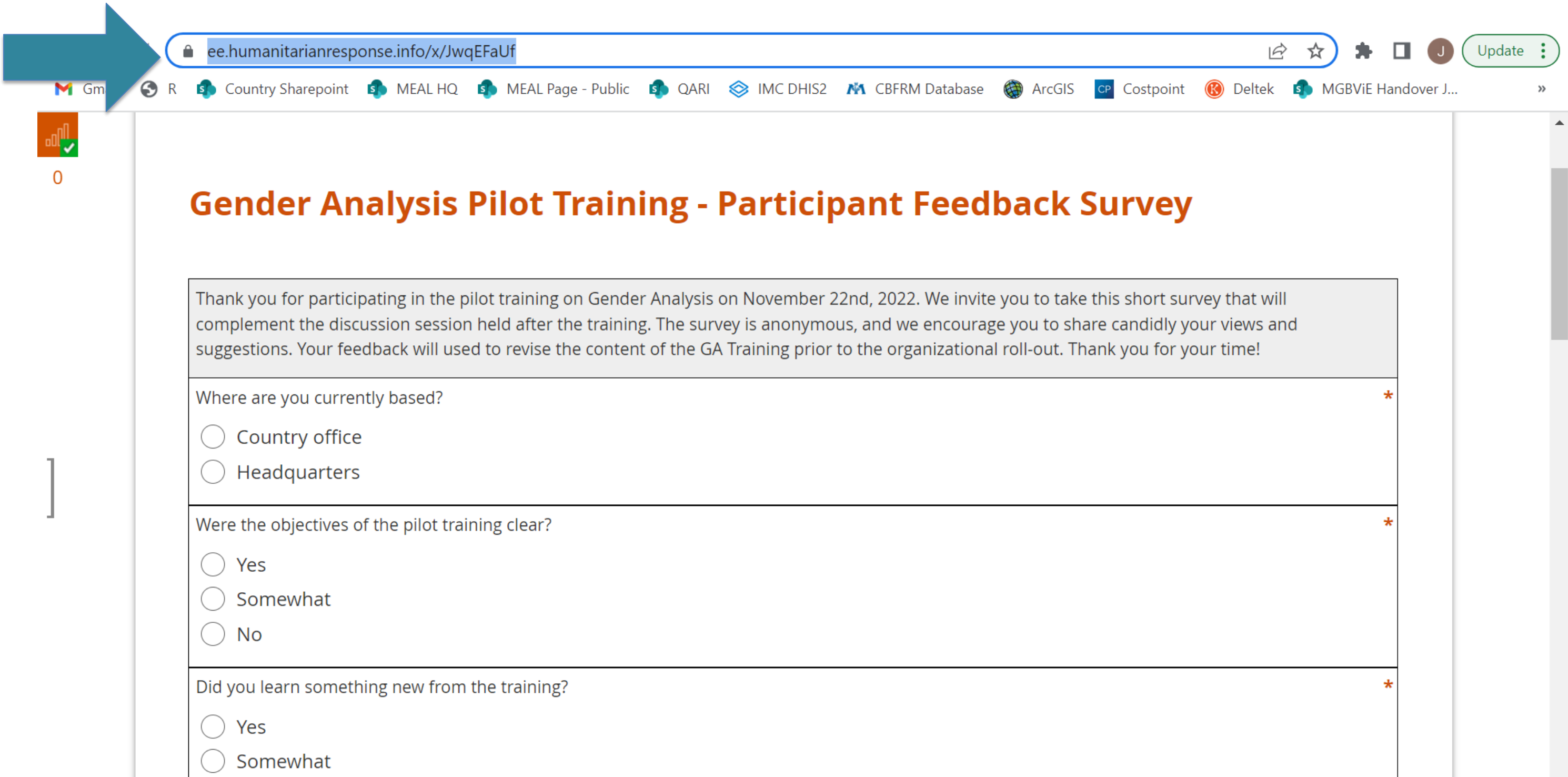
- Collect more data if you have any or upload.
- Connect to internet to send finalized form



# Web-based data entry- alternative to phones/tablets

The screenshot displays the KoboToolbox interface for a survey titled "Gender Analysis Pilot Training - Participant Feedback Survey". The top navigation bar includes the KoboToolbox logo, the survey title, and a notification for "10 submissions". Below the navigation bar, there are tabs for "SUMMARY", "FORM", "DATA", and "SETTINGS", with "FORM" being the active tab. On the left sidebar, there are sections for "NEW", "Deployed" (with 2 items), "Draft" (with 1 item), and "Archived" (with 4 items). The main content area shows the survey details: "v3 Last Modified : December 6, 2022 - 18 questions" and a "REDEPLOY" button. Below this, it states "Languages: This project has no languages defined yet" with a globe icon. A "SHOW FULL HISTORY" link is also present. Under the "Collect data" section, there is a dropdown menu set to "Online-Offline (multiple submission)", a "COPY" button, and an "OPEN" button. A red circle highlights the "FORM" tab and the "OPEN" button. A teal arrow points from the "FORM" tab down to the "OPEN" button. Another teal arrow points from the "Online-Offline" dropdown menu to the right.

# Web-based data entry- alternative to phones/tablets



The image shows a browser window with a teal arrow pointing to the address bar. The address bar contains the URL `ee.humanitarianresponse.info/x/JwqEFaUf`. The browser's taskbar at the top shows various application icons including Gmail, R, Country Sharepoint, MEAL HQ, MEAL Page - Public, QARI, IMC DHIS2, CBFRM Database, ArcGIS, Costpoint, Deltek, and MGBViE Handover J... The survey page content includes a thank-you message and three questions with radio button options.

## Gender Analysis Pilot Training - Participant Feedback Survey

Thank you for participating in the pilot training on Gender Analysis on November 22nd, 2022. We invite you to take this short survey that will complement the discussion session held after the training. The survey is anonymous, and we encourage you to share candidly your views and suggestions. Your feedback will used to revise the content of the GA Training prior to the organizational roll-out. Thank you for your time!

Where are you currently based? \*

- Country office
- Headquarters

Were the objectives of the pilot training clear? \*

- Yes
- Somewhat
- No

Did you learn something new from the training? \*

- Yes
- Somewhat



# Download data from the deployed form

1. Choose the "DATA" tab and then choose "Downloads" from the left column.

2. Select export type (xls) as excel extension.

3. Press on "EXPORT" from the right.

4. Your browser will download the export raw data file.

The screenshot shows a web interface with a top navigation bar containing 'SUMMARY', 'FORM', 'DATA', and 'SETTINGS'. The 'DATA' tab is active. On the left, a sidebar menu includes 'Table', 'Reports', 'Gallery', 'Downloads', and 'Map'. The 'Downloads' section is open, displaying a 'Select export type' dropdown menu with options: XLS, CSV, GeoJSON, SPSS Labels, CSV (legacy), GPS coordinates (KML), XLS (legacy), and Media Attachments (ZIP). The 'XLS' option is selected. To the right, there is a 'Value and header format' dropdown menu set to 'English (en-en)'. A blue 'EXPORT' button is located at the bottom right of the interface.

# Reports feature

1. Choose "DATA" tab and then "Reports" from the left column

The screenshot shows the 'DATA' tab of a reporting interface. On the left, a sidebar contains navigation options: Table, Reports (highlighted), Gallery, Downloads, and Map. The main content area has tabs for SUMMARY, FORM, DATA (selected), and SETTINGS. Below the tabs, there is a 'CUSTOM REPORTS' section with a gear icon. A warning message states: 'This is an automated report based on raw data submitted to this project. Please conduct proper data cleaning prior to using the graphs and figures used on this page.' Two data summary cards are shown:

- How many children are here?**  
TYPE: "INTEGER". 2 out of 2 respondents answered this question. (0 were without data.)  
Summary table:

Mean	Median	Mode	Standard deviation
3.00	3.00	*	1.41
- How long have you been here?**  
TYPE: "INTEGER". 2 out of 2 respondents answered this question. (0 were without data.)  
Summary table:

Mean	Median	Mode	Standard deviation
8.00	8.00	*	5.66

2. Data collected will be shown here.

The screenshot shows the 'DATA' tab of the reporting interface. It features the same navigation and tabs as the previous screenshot. Below the tabs, a question is displayed: 'Are you aware of your rights and obligations?' with the note 'TYPE: "SELECT\_ONE". 2 out of 2 respondents answered this question. (0 were without data.)'. Below the question is a bar chart showing the distribution of responses:

Value	Frequency	Percentage
Yes	2	100%
No	0	0%

# Reports feature

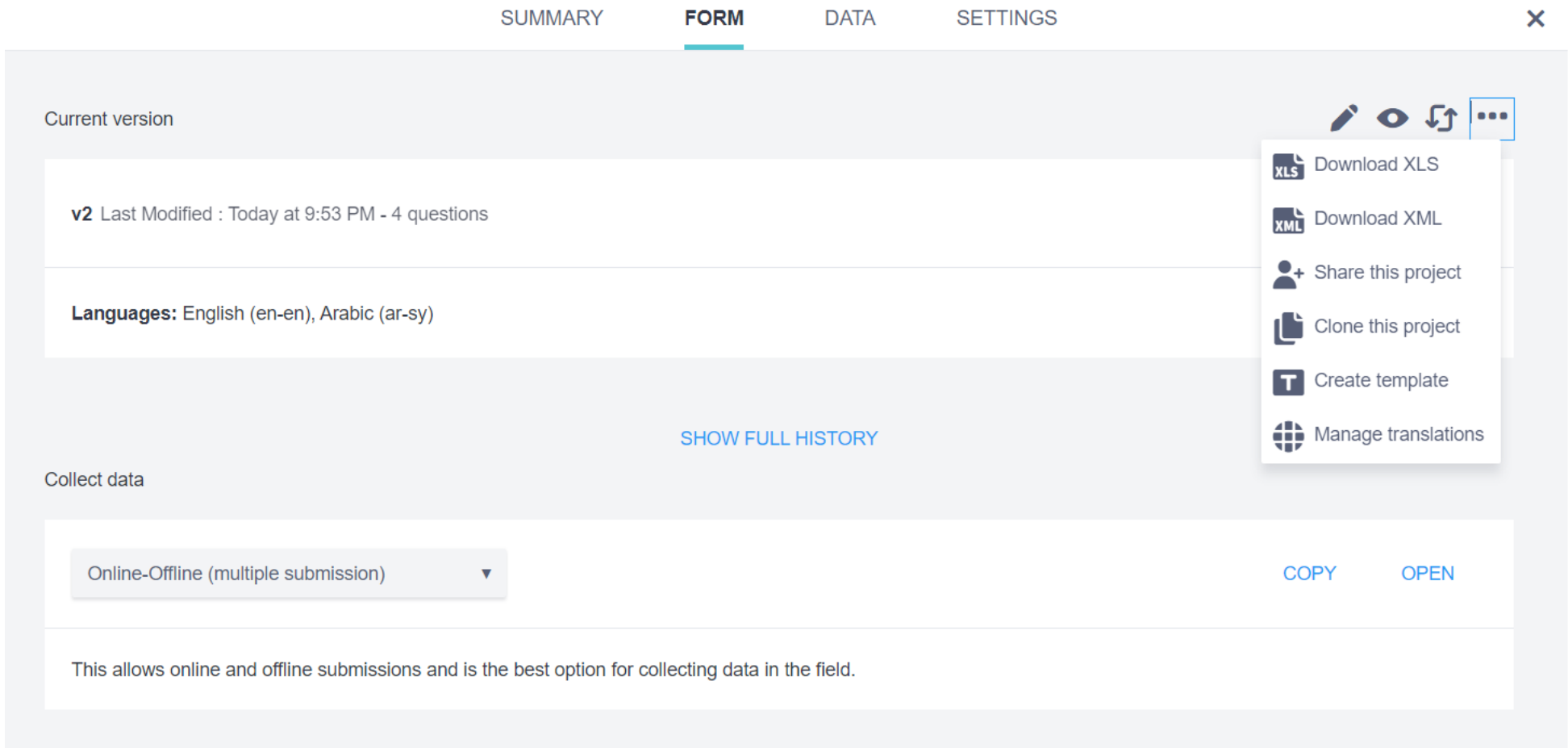
To view data with other languages

1. Press on the settings icon from the "DATA" tab and the "Reports" column.
2. Press on "SAVE" to view the data in another language

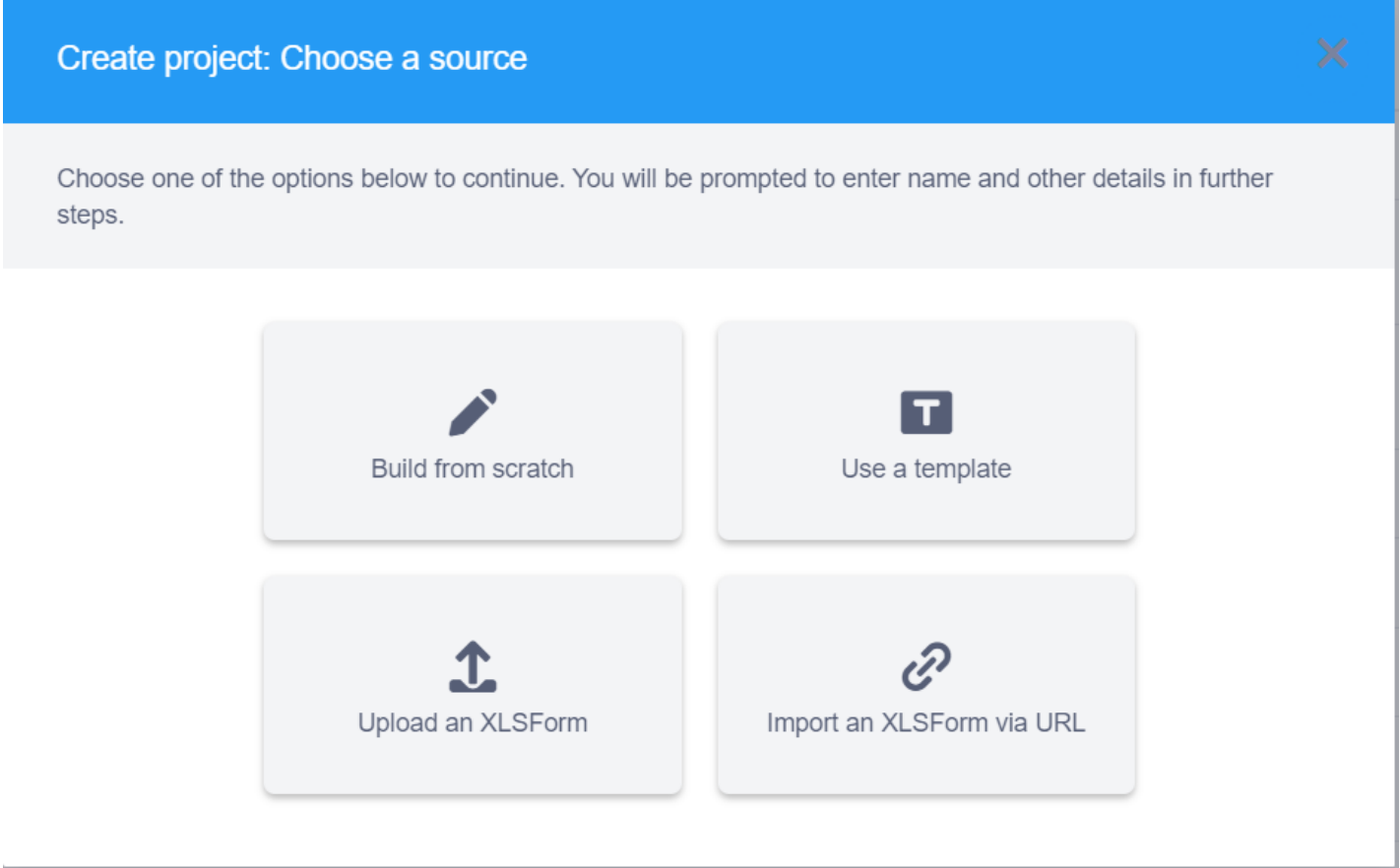
The screenshot displays the 'DATA' tab of a reporting application. A teal arrow points from the 'Settings' icon in the 'CUSTOM REPORTS' section to the 'Reports' column in the left sidebar. Another teal arrow points from the 'Reports' column to the 'Edit Report Style' dialog box. The dialog box has a blue header with a close button (X) and four tabs: 'CHART TYPE', 'COLORS', 'GROUP BY', and 'TRANSLATION'. The 'TRANSLATION' tab is active, showing two radio button options: 'English (en-en)' and 'Arabic (ar-sy)'. The 'Arabic (ar-sy)' option is selected. A blue 'SAVE' button is located at the bottom right of the dialog box. Below the dialog box, the text 'منذ متى وانت تعيش هنا؟' is visible, followed by the text 'TYPE: "INTEGER". 3 out of 3 respondents answered this question. (0 were without data.)'.

# Cloning a form vs creating a template

Cloning a form: this will create an identical copy of the whole project “form”.



Creating template: this will only copy the questions, answer options and the style of the project to be used as a template for new projects.



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