



# KOBO TOOLBOX

Creating a New Survey/Project (01.02)

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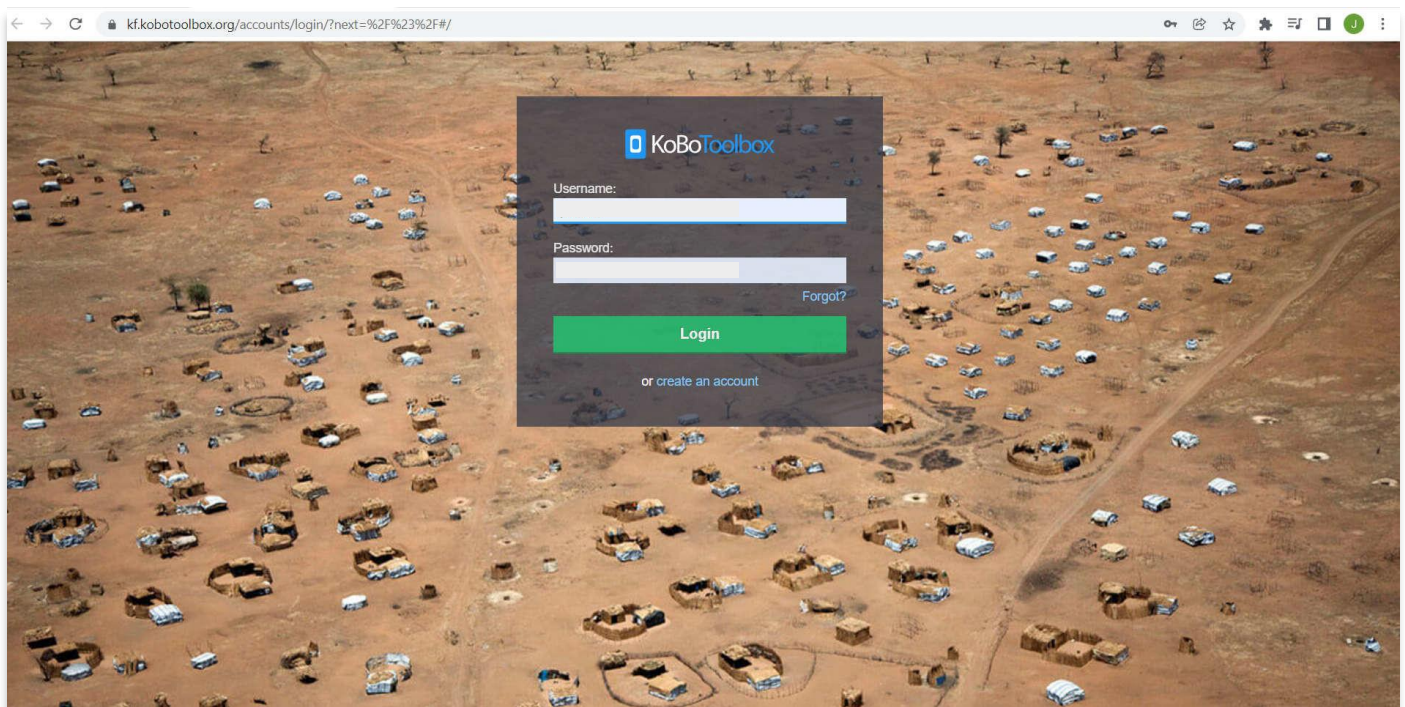
## ABOUT KOBO TOOLBOX

KoBoToolbox is a free and open source software package for location and descriptive data collection. Information can be collected at heritage sites through tablets and phones using the KoBoCollect app or through the web browser interface, even when those devices are offline. Location and descriptive data recorded in the field can then be synched up with GIS software once an internet connection has been reestablished.

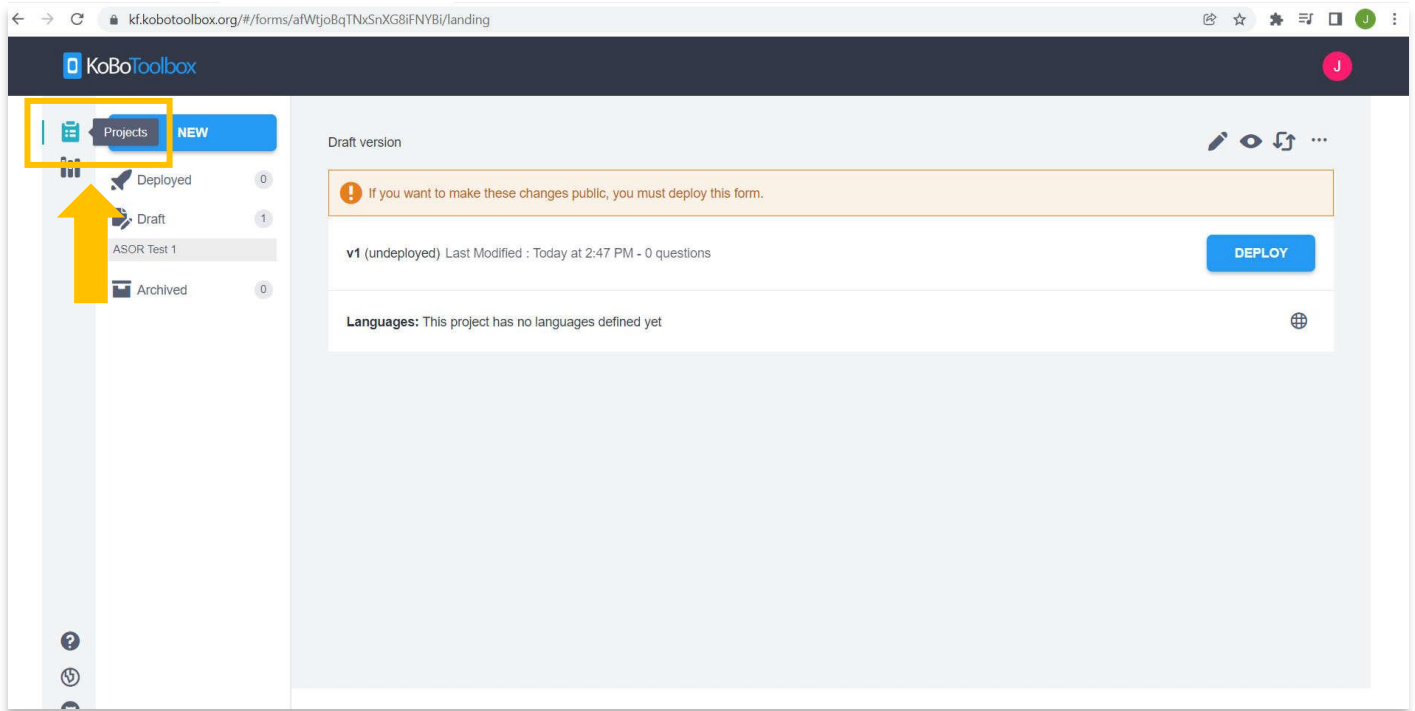
This **ASOR tutorial (01.02)** will cover how to create a new **Survey** or **Project**, share permissions with other users, and add additional languages in KoBoToolBox on a desktop computer, laptop, and tablet.

## WORKFLOW

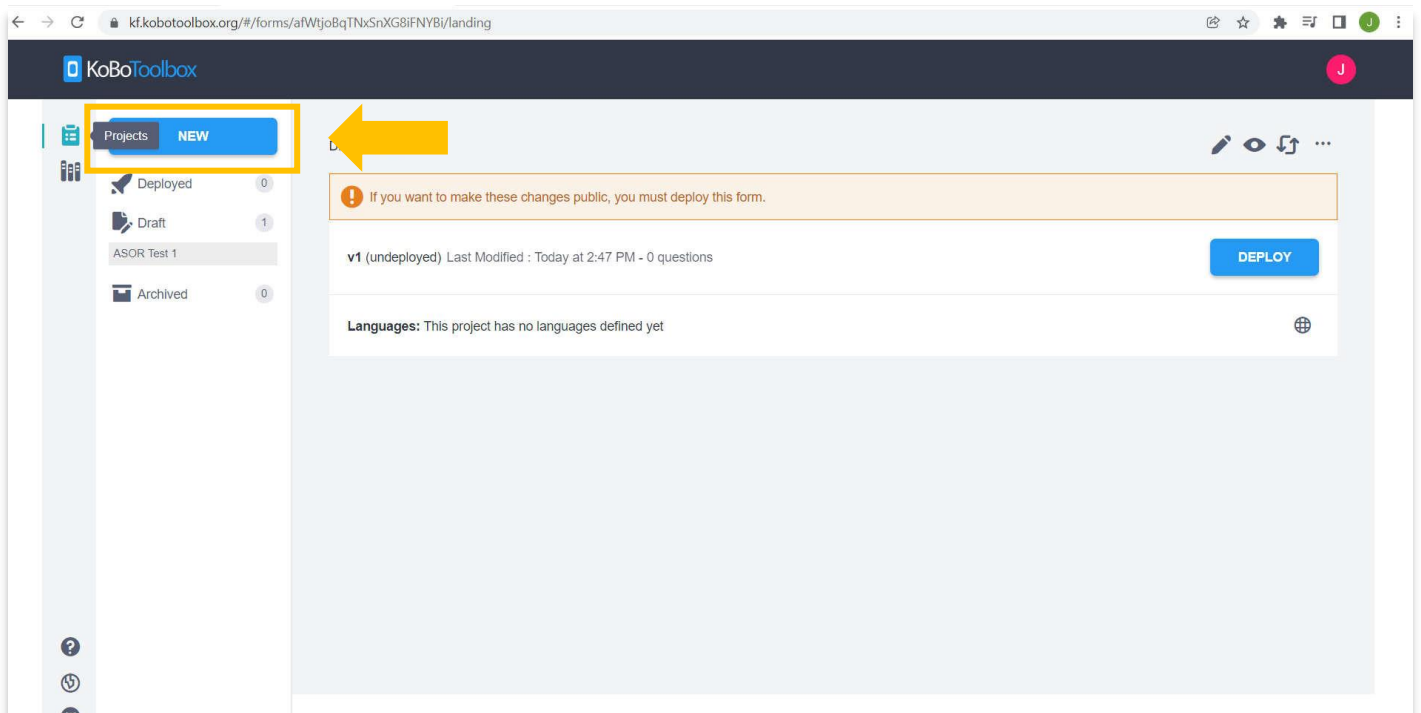
1. Login to your KoBoToolBox Account: <https://kf.kobotoolbox.org/accounts/login/>. Use your Username and Password created in [ASOR Tutorial 01.01 \(Creating a KoBoToolBox User Account\)](#).



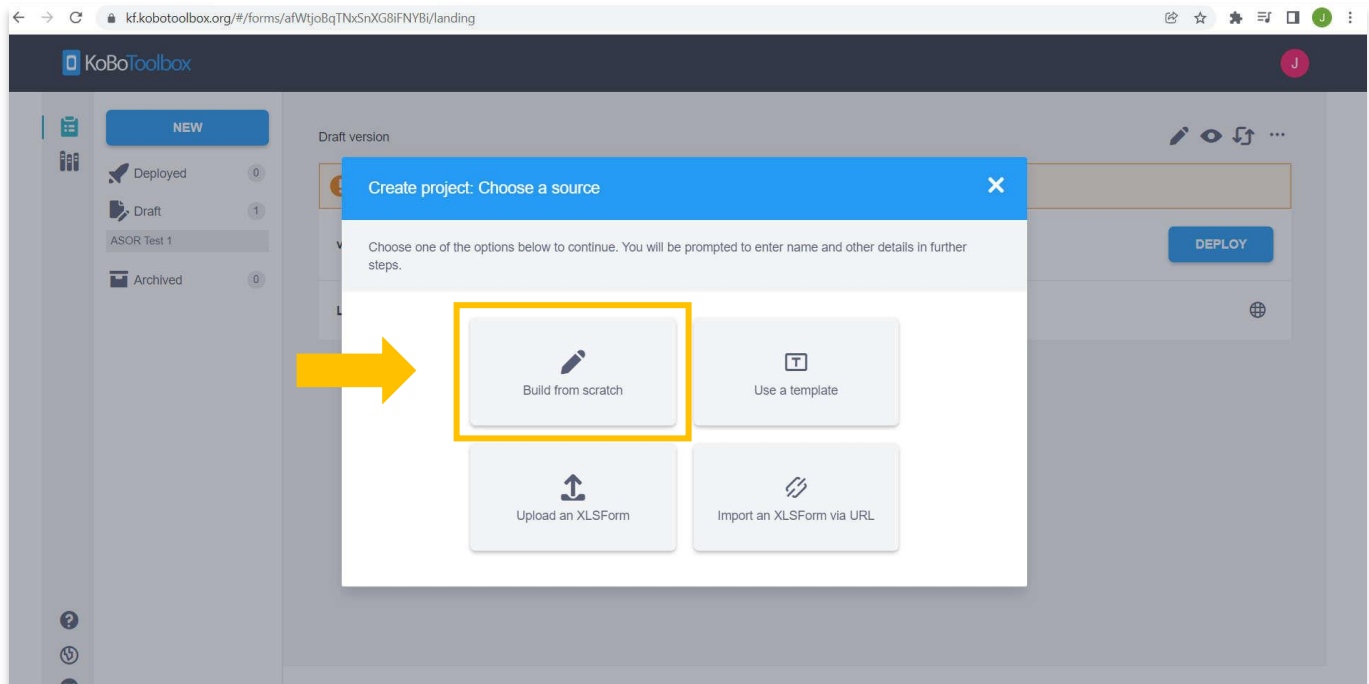
- Once logged in, you will be directed to your KoBoToolBox Dashboard. This is where your surveys and projects will be stored. After your first login, you will not have any projects here. To create a new project, select the **Projects** icon in the top right. It looks like a blue clipboard.



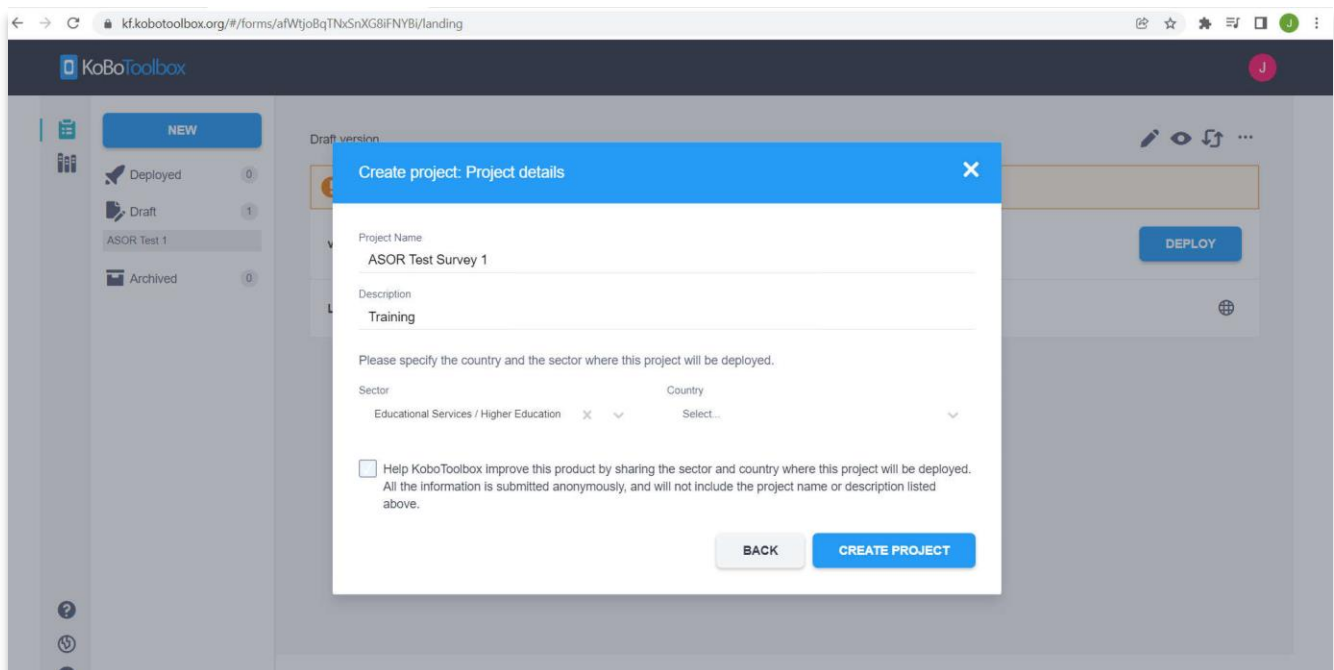
- Then click the blue **New** button.



4. A “Create Project” pop-up window will appear. For our purposes, select **Build from Scratch**.

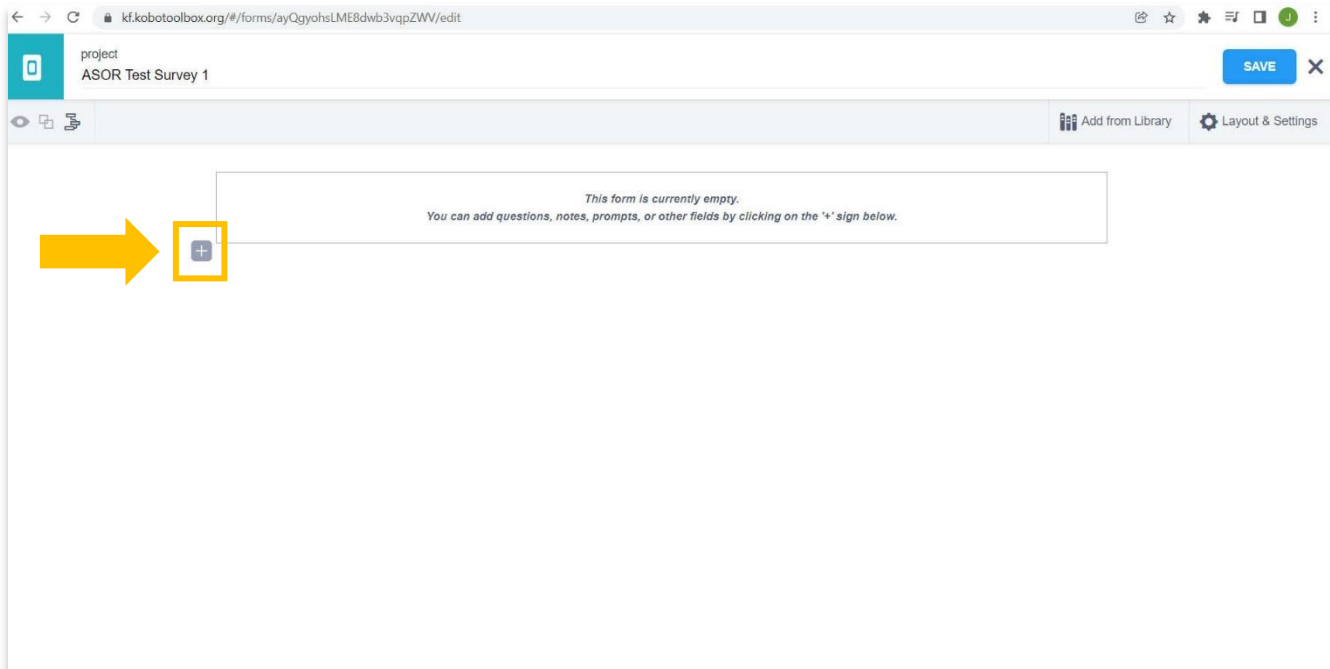


5. Fill out the information in the field provided. \* Note – You do not need to click the box that states, “Help KoboToolBox improve this product...” Once all fields are completed, select the blue **Create Project** button.

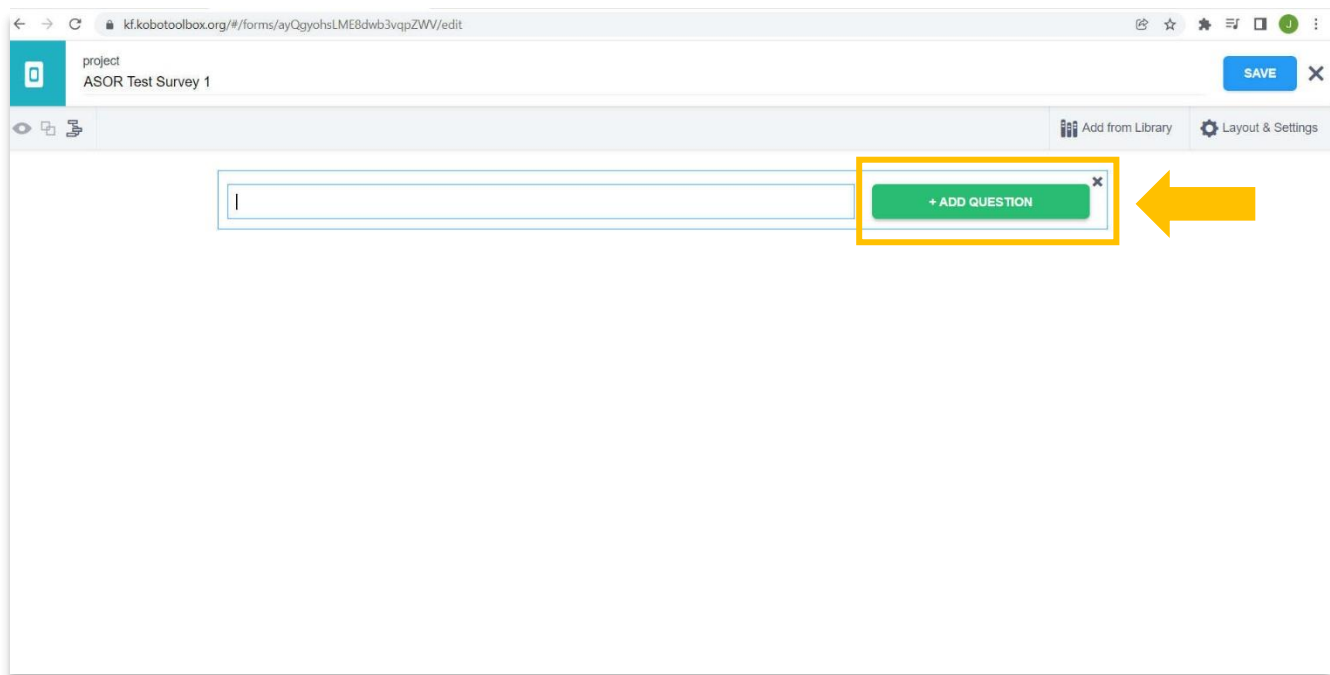


6. You will be taken to an empty project form page. From this page you can begin to build your collection form. This will be the form that you use when collecting information, so prior to adding new questions and survey fields, you should consider the type of information that you and your partners wish to collect.

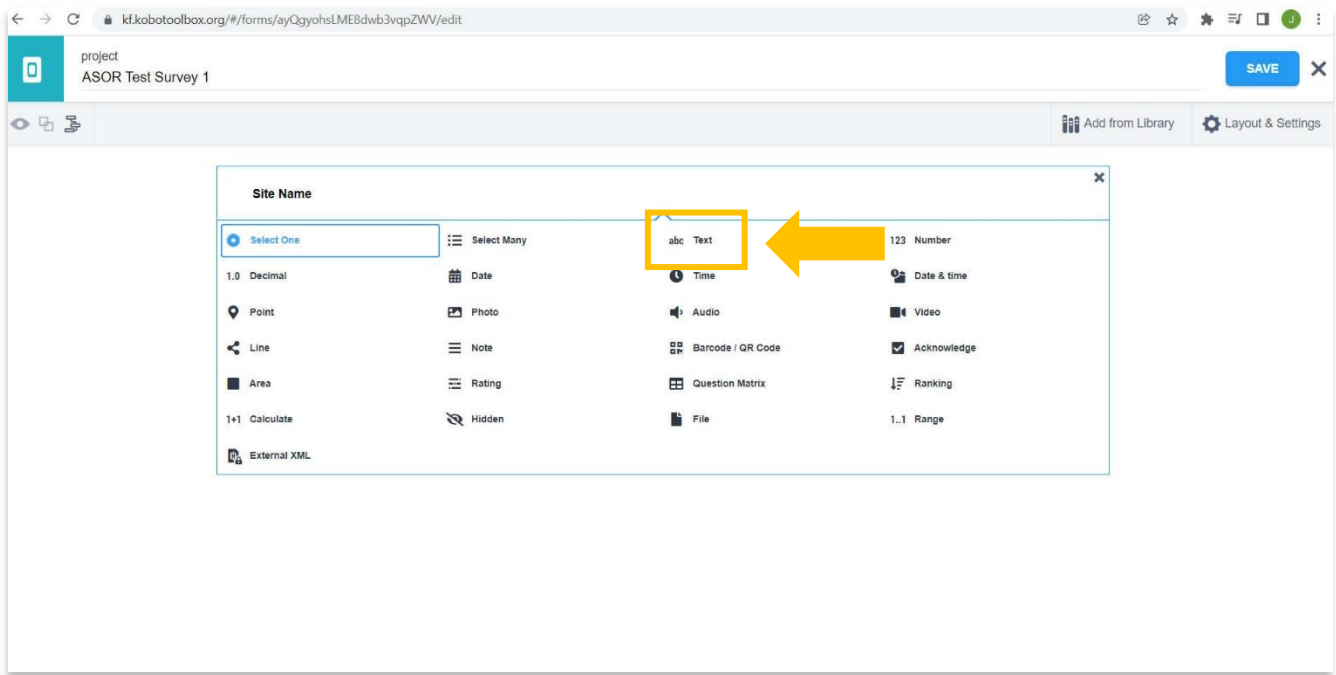
To add a new field on the form, select the **+ icon**.



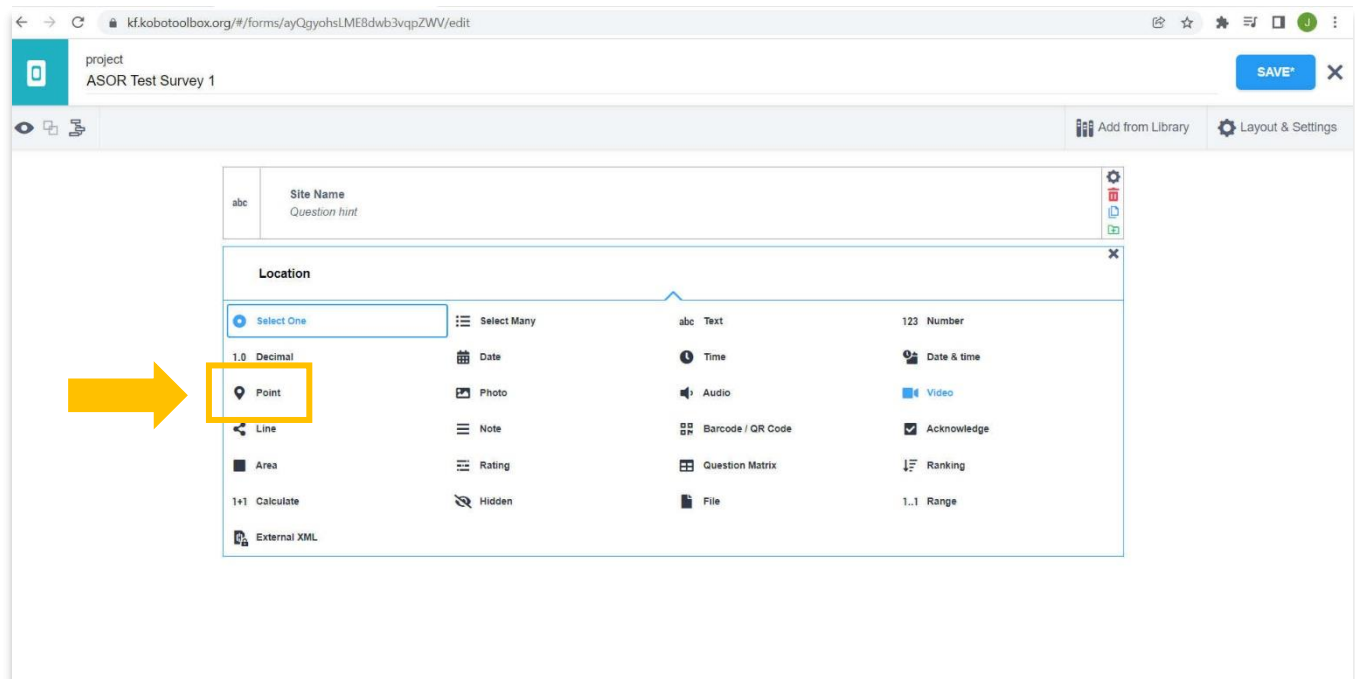
7. Here you can add any type of question or field name that would be useful for your survey. For example, add a field named, **Site Name**, then select the green **+Add Question** button.



8. A drop-down will appear that allows you to choose the structure of the field. There are many ways you could design each field. Select **Text** for the Site Name field. This will allow users to enter text in the response.



9. You can add more questions for every type of information that you wish to collect. Another useful field would be **Site Location**. By selecting **Point**, you can record a geographical coordinate.



10. Another field that would be useful is **Site Type**. For this, you can select an option that controls the specific options or vocabulary used in the survey.

To do this, create a new question named **Site Type**, then pick **Select One** in the dropdown. There is not a limit to the number terms you can add, however typically 5-10 options within a single question would be more useful than having too many, which would become difficult to scroll through when collecting data in the field.

The screenshot shows the KoboToolbox form editor interface. At the top, the project name is 'ASOR Test Survey 1'. Below the project name, there are two existing questions: 'Site Name' and 'Location'. A third question, 'Site Type', is being created. A yellow arrow points to the 'Select One' option in the dropdown menu for the 'Site Type' question. The dropdown menu also shows other options like 'Select Many', 'Text', 'Number', 'Date', 'Time', 'Date & time', 'Point', 'Photo', 'Audio', 'Video', 'Line', 'Barcode / QR Code', 'Acknowledge', 'Area', 'Rating', 'Ranking', 'Calculate', 'Hidden', 'Question Matrix', 'File', and 'Range'.

The screenshot shows the KoboToolbox form editor interface. The 'Site Type' question is now configured with a list of options: 'Building', 'Monument', 'Cemetery', and 'Ruins'. Each option has an 'XML value' field set to 'AUTOMATIC'. There is a '+ Click to add another response...' button at the bottom of the list. The 'Site Name' and 'Location' questions are still visible above the 'Site Type' question.

- Each question will appear on the form in the order that you created them. You can change the order of questions by dragging questions up and down.

project  
ASOR Test Survey 1

SAVE

Add from Library Layout & Settings

Location  
Question hint

Site Name  
Question hint

Site Type  
Question hint

Building XML value: AUTOMATIC

Monument XML value: AUTOMATIC

Cemetery XML value: AUTOMATIC

Ruins XML value: AUTOMATIC

+ Click to add another response...

Building

+ ADD QUESTION

12. Additional information you may wish to collect:

- Street Address (if known) – Text in dropdown
- Date/Time of Recording – Date & Time in dropdown
- Photos – Photo in dropdown
- Building material – Select One in dropdown
- Current Condition – Text in dropdown

**There are many other options for questions. These will be dependent upon your survey goals and research questions.**



13. Any time you create a new question or make changes to your form, it is best practice to save your project by clicking the blue **Save** button. An \* will appear in the save button if changes have been made to the project, but the project has not yet been saved.

The screenshot shows the Kobotoolbox form editor interface. The top bar displays the project name "project ASOR Test Survey 1". In the top right corner, a yellow arrow points to a blue button labeled "SAVE\*", indicating that changes have been made but not yet saved. Below the top bar, there are icons for "Add from Library" and "Layout & Settings". The main form area contains several questions: "Site Name" (text input), "Location" (text input), "Site Type" (dropdown menu), and "Date of Construction" (text input). The "Site Type" dropdown is expanded, showing a list of options: "Building", "Monument", "Cemetery", and "Ruins". Each option has a corresponding "XML value" of "AUTOMATIC". A plus icon is visible at the bottom left of the form area.

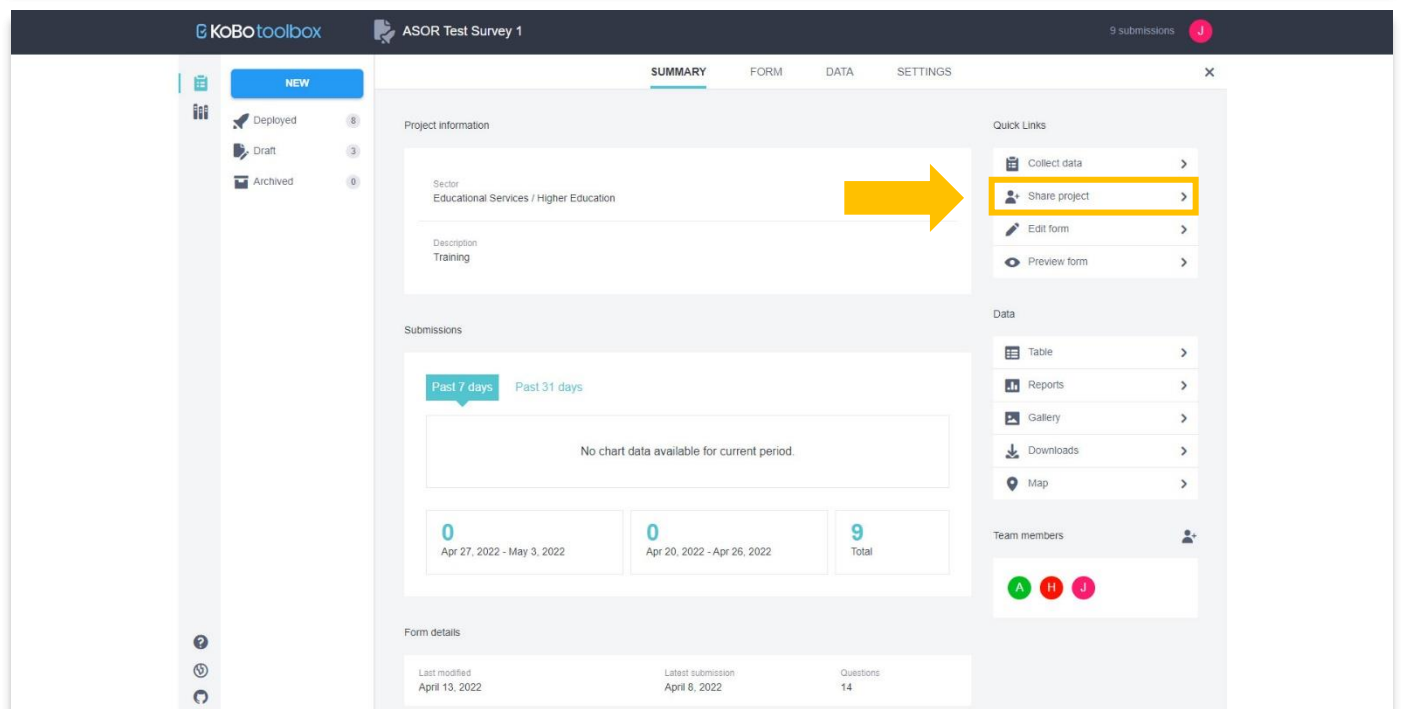
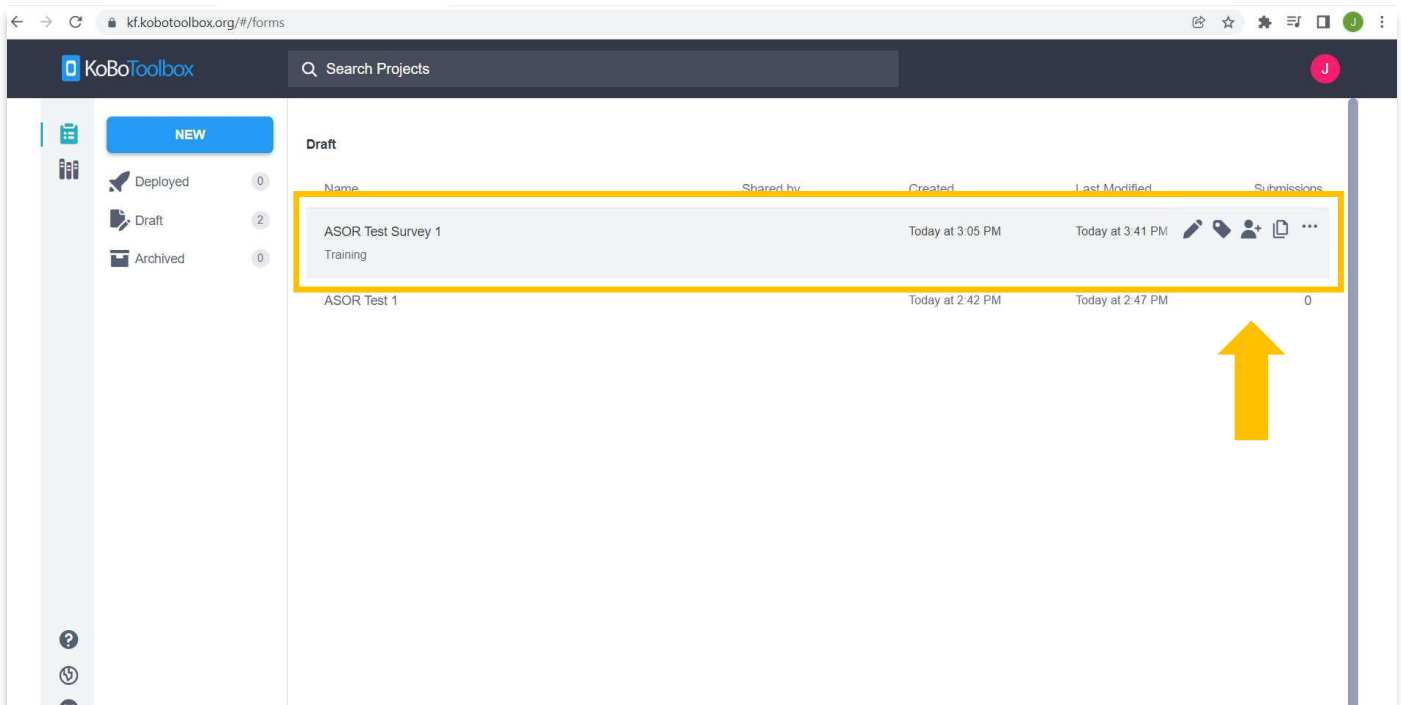
14. Once finished adding questions to your form, click on the blue icon in the top left corner to return to your dashboard and view all your projects.

The screenshot shows the Kobotoolbox form editor interface. A yellow arrow points to a blue icon in the top left corner, which is used to return to the dashboard. The form contains the same questions as the previous screenshot: "Site Name", "Location", "Site Type", and "Date of Construction". The "Site Type" dropdown is expanded, showing the same list of options: "Building", "Monument", "Cemetery", and "Ruins". Each option has a corresponding "XML value" of "AUTOMATIC". A plus icon is visible at the bottom left of the form area.

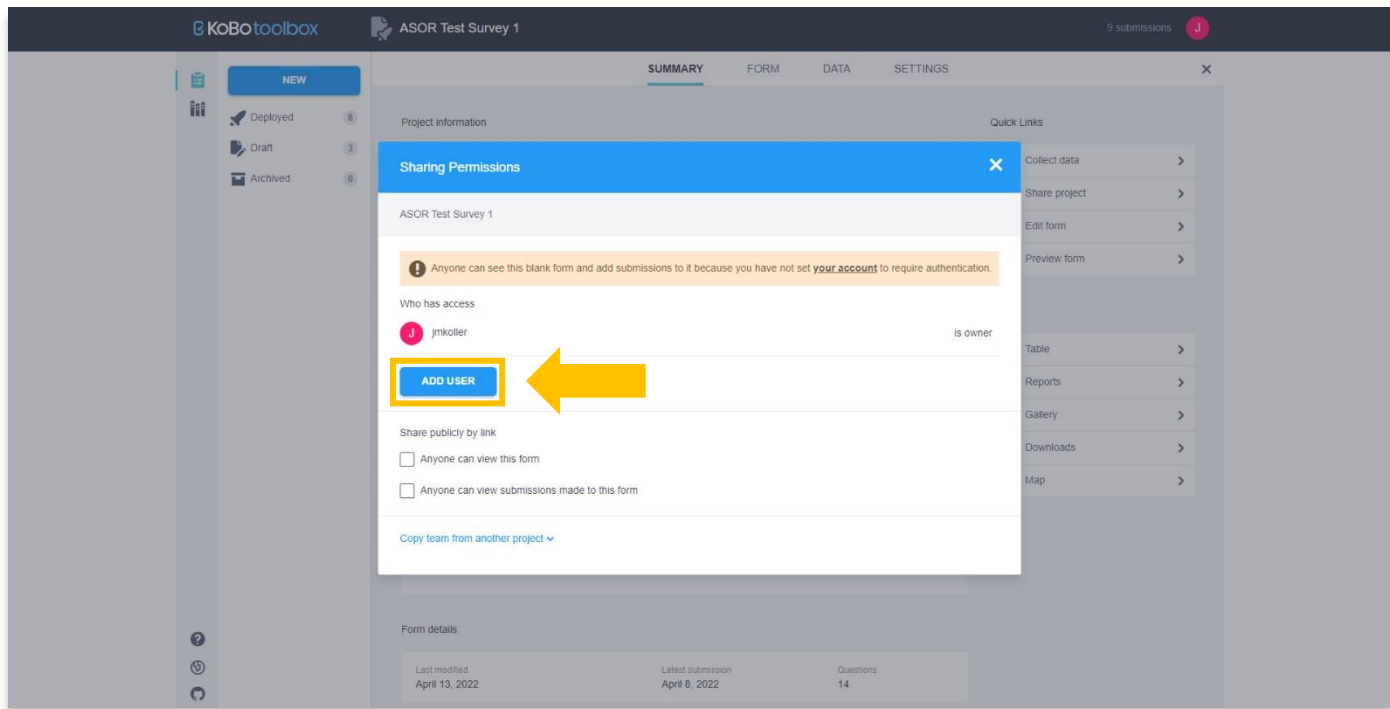
## GRANTING EDITING PERMISSIONS TO OTHER USERS

15. KoboToolbox allows giving different permission levels to a data collection project. While most users may only use a single user to manage, access, and enter data for a given project, sometimes more complex scenarios require different levels of access.

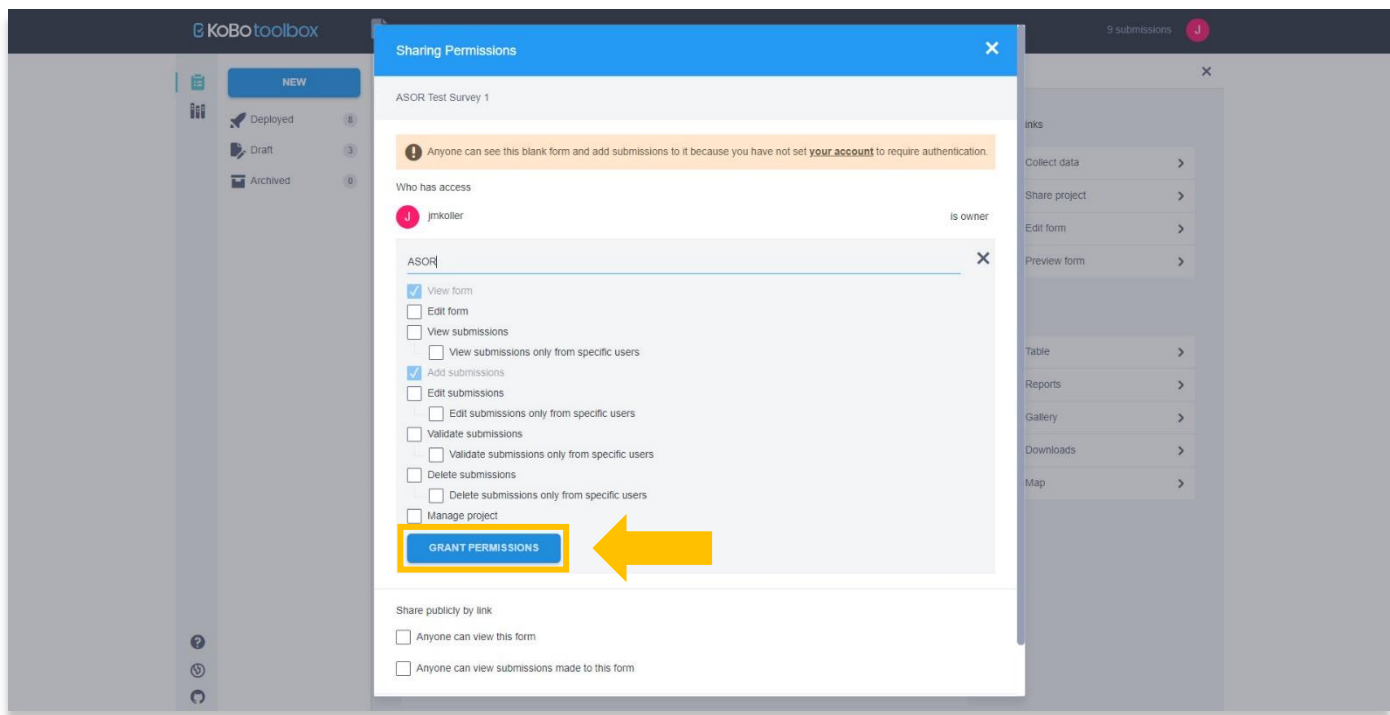
Select the project you wish to share access with from the main KoboToolbox dashboard. In the **Summary** tab, choose **Share Project**. You can also hover over the project in the main dashboard and select the share icon.



16. Choose the **Add User** button to give project permissions to another user.

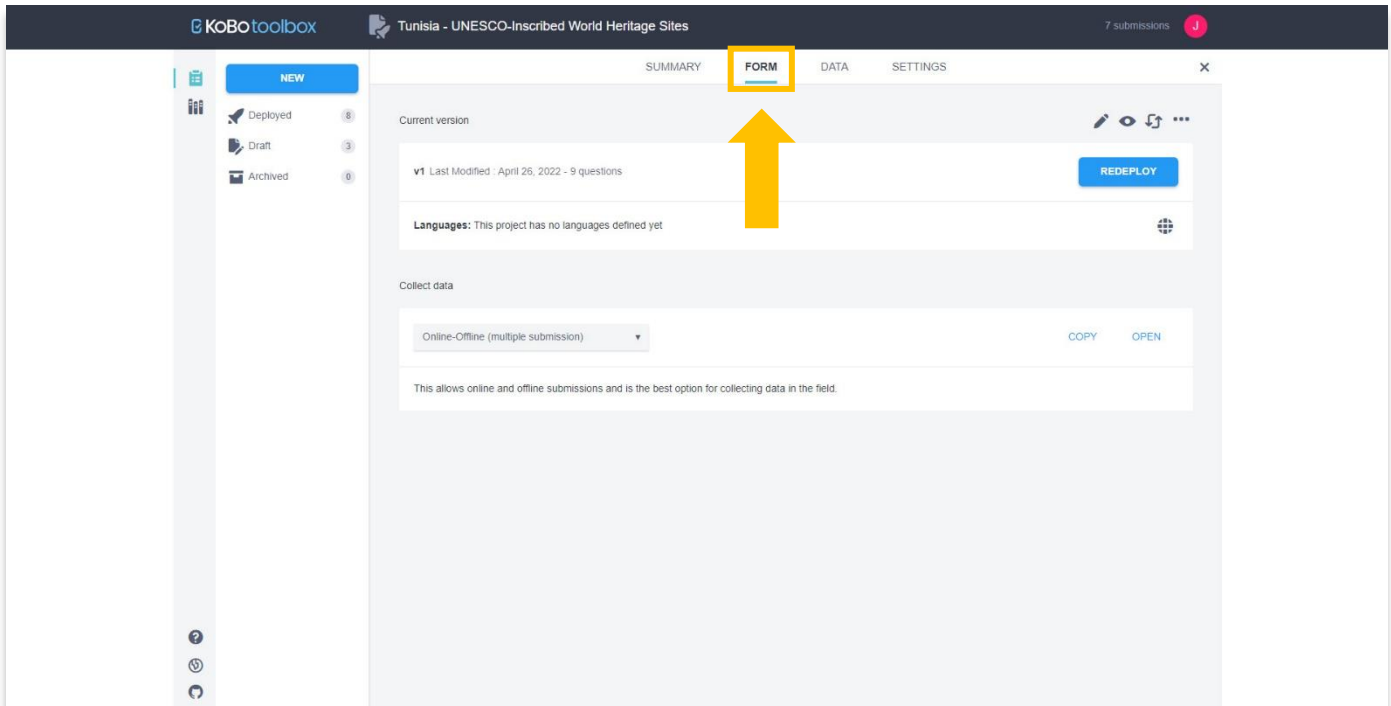


17. Add the username (not email address) and set the permission levels in the pop-up. Once completed select the **Grant Permissions** button.

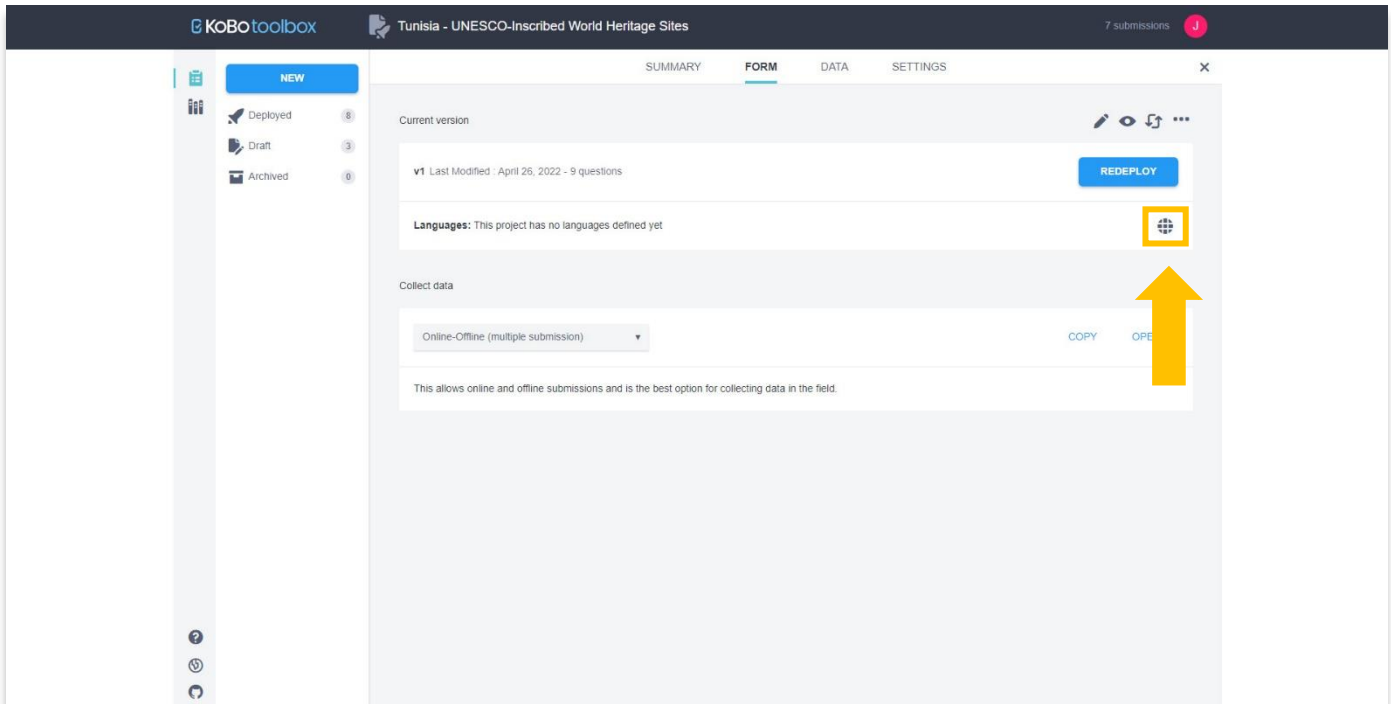


## LANGUAGE SETTINGS

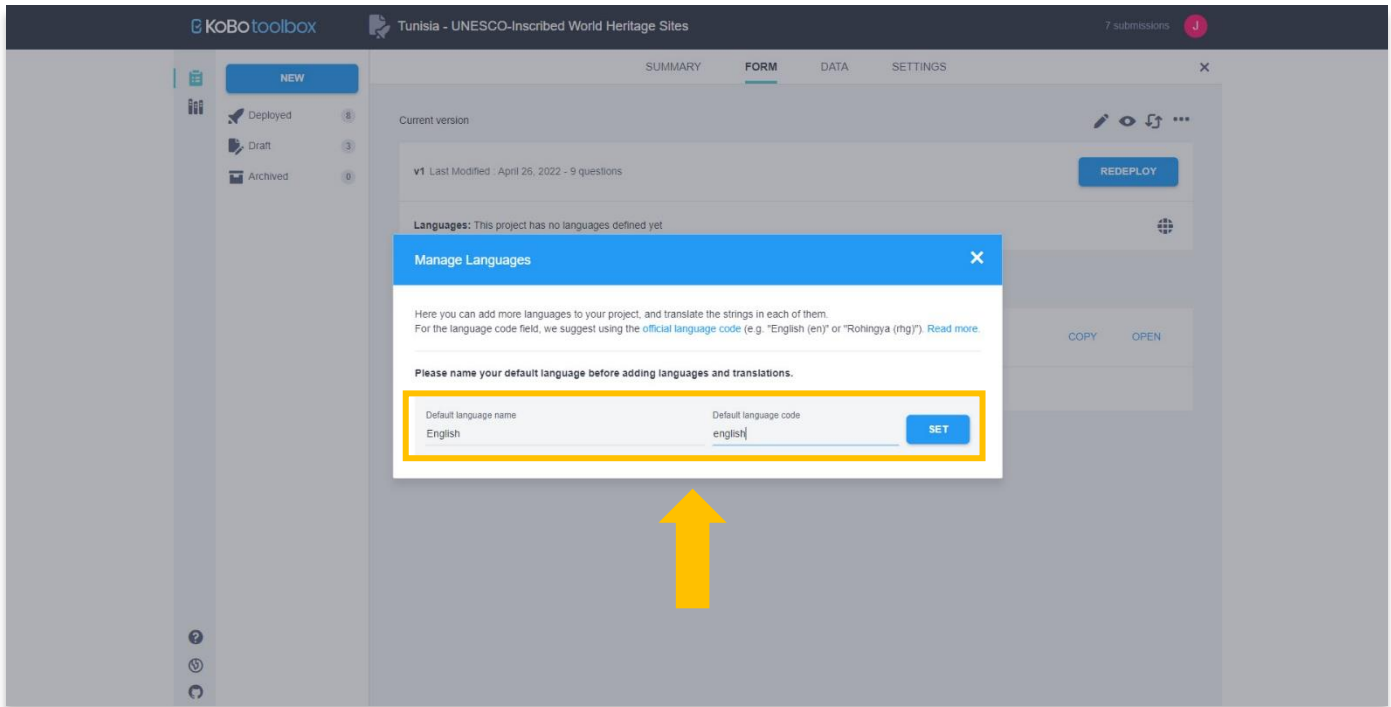
18. KoboToolbox forms offer multiple language settings. To add languages, open your project from the dashboard and select the **Form** tab.



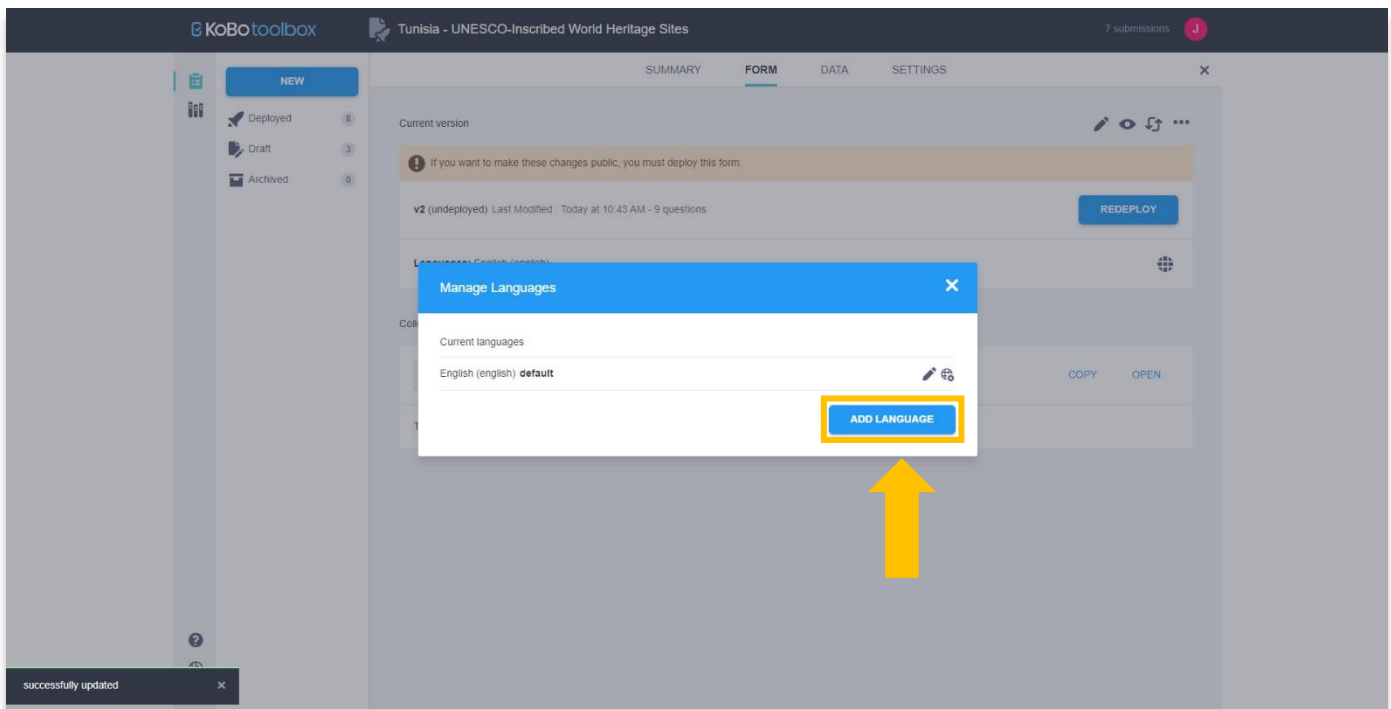
19. Select the **Language Icon**.



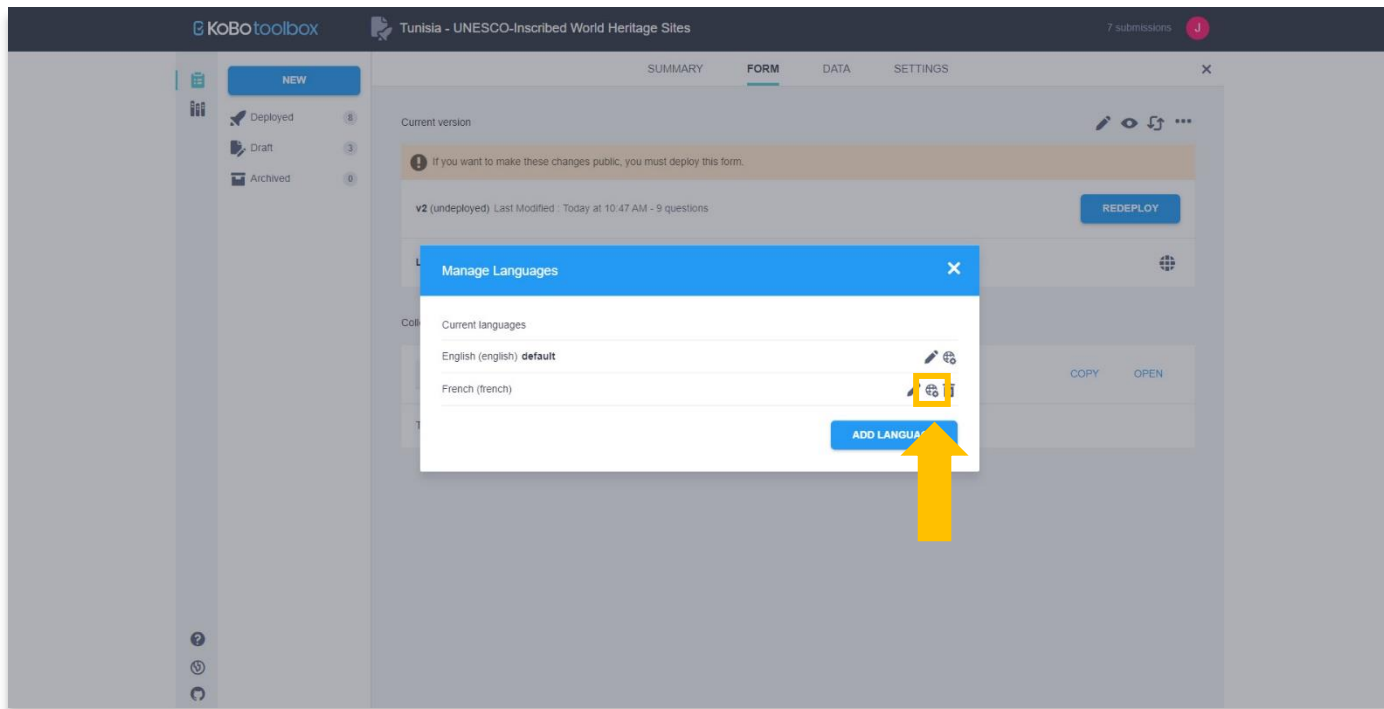
20. Enter the default language for the form. Select the **Set** button.



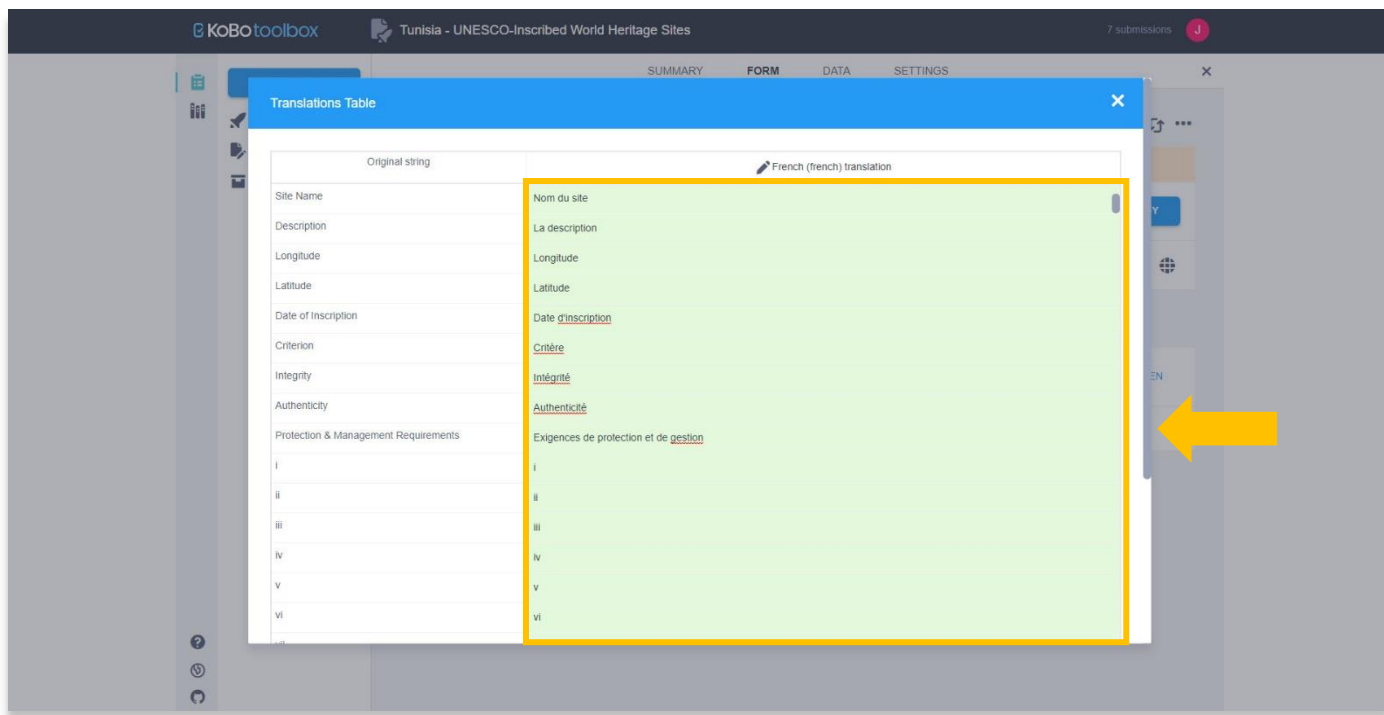
21. After setting the default language, you can add a second language by selecting the **Add Language** button.



22. Add the language name (see step 20 of this tutorial), then select the **Update Translations** button.



23. Fill in the translations for each question in the right column. Every term in your form will appear in this pop-up, including the answer options created for **Select One** or **Select Many** questions.



24. Select the **Save** button at the bottom when you are finished adding translations. A message will appear at the bottom left of your browser confirming that the translations have been saved. Close the pop-up to return to the project page.

KoboToolbox Tunisia - UNESCO-Inscribed World Heritage Sites 7 submissions

SUMMARY FORM DATA SETTINGS

Date of inscription Date d'inscription

Criterion Critère

Integrity Intégrité

Authenticity Authenticité

Protection & Management Requirements Exigences de protection et de gestion

i i

ii ii

iii iii

iv iv

v v

vi vi

vii vii

viii viii

ix ix

x x

Prev Page 1 of 1 Next

\* SAVE CHANGES

25. Select the **Preview** button. 

KoboToolbox Tunisia - UNESCO-Inscribed World Heritage Sites 7 submissions

SUMMARY FORM DATA SETTINGS

NEW

Deployed 8

Draft 3

Archived 0

Current version

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

v2 (undeployed) Last Modified : Today at 10:54 AM - 9 questions

Languages: English (english), French (french)

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.

REVIEW

26. A drop-down menu will now appear on your form that allows you to choose a language. Additional languages can be added by repeating steps 21 through 24 of this tutorial.

The screenshot shows the KoBoToolbox interface for a form titled "Tunisia - UNESCO-Inscribed World Heritage Sites". The "Form Preview" window is open, displaying the form fields: "Site Name", "Description", "Longitude", "Latitude", and "Date of Inscription". A yellow arrow points to the "Choose Language" dropdown menu, which is currently set to "English". The dropdown menu is open, showing "English" and "French" as options.

The screenshot shows the same KoBoToolbox interface, but the "Choose Language" dropdown menu is now set to "French". The form fields are labeled in French: "Nom du site", "La description", "Longitude", "Latitude", and "Date d'inscription".





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