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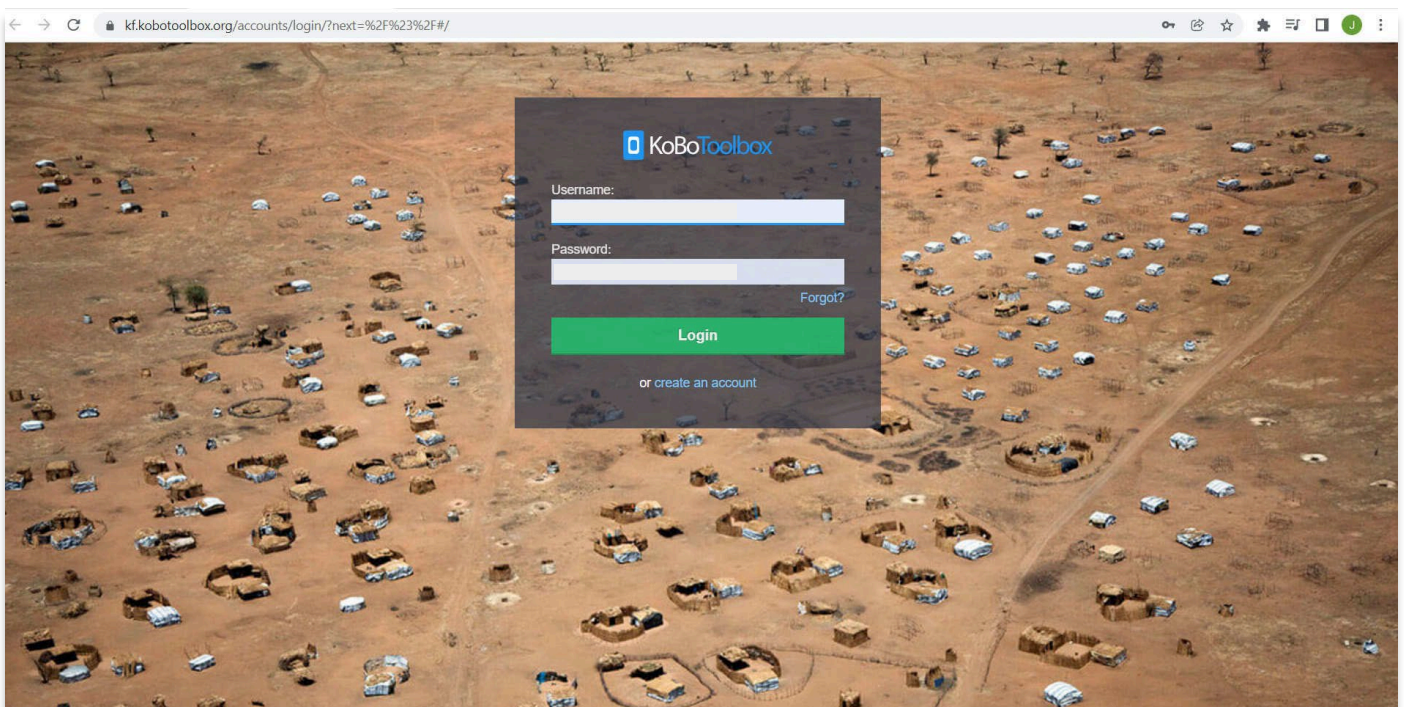
2. Once logged in, you will be directed to your KoBoToolBox Dashboard. This is where your surveys and projects will be stored. After your first login, you will not have any projects here. To create a new project, select the Projects icon in the top right. It looks like a blue clipboard.
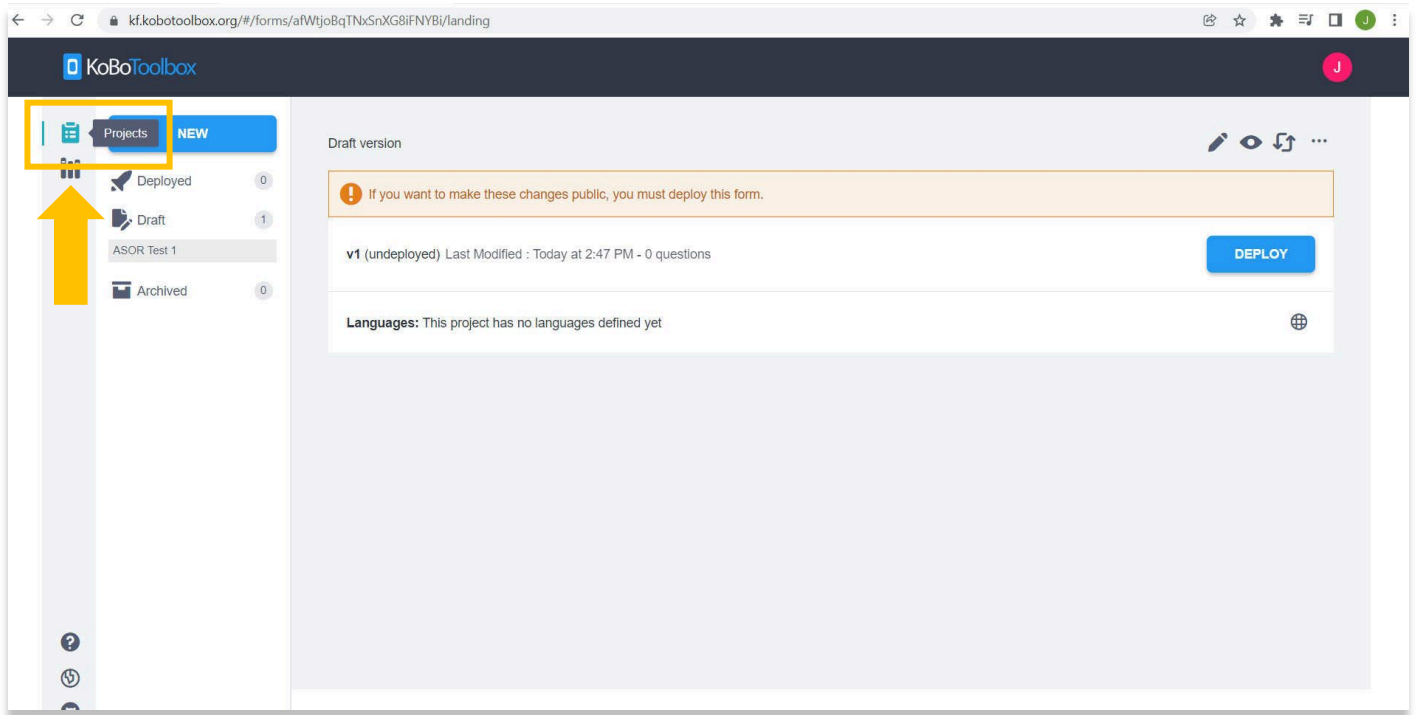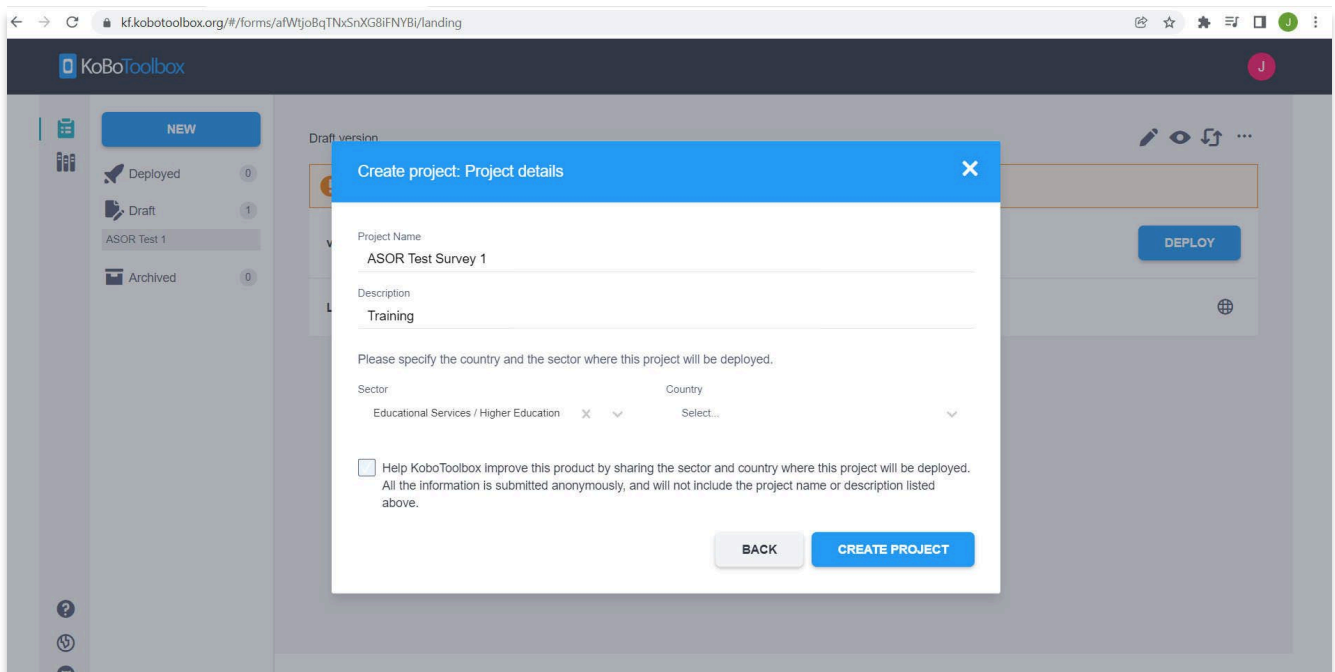

3. Then click the blue New button.
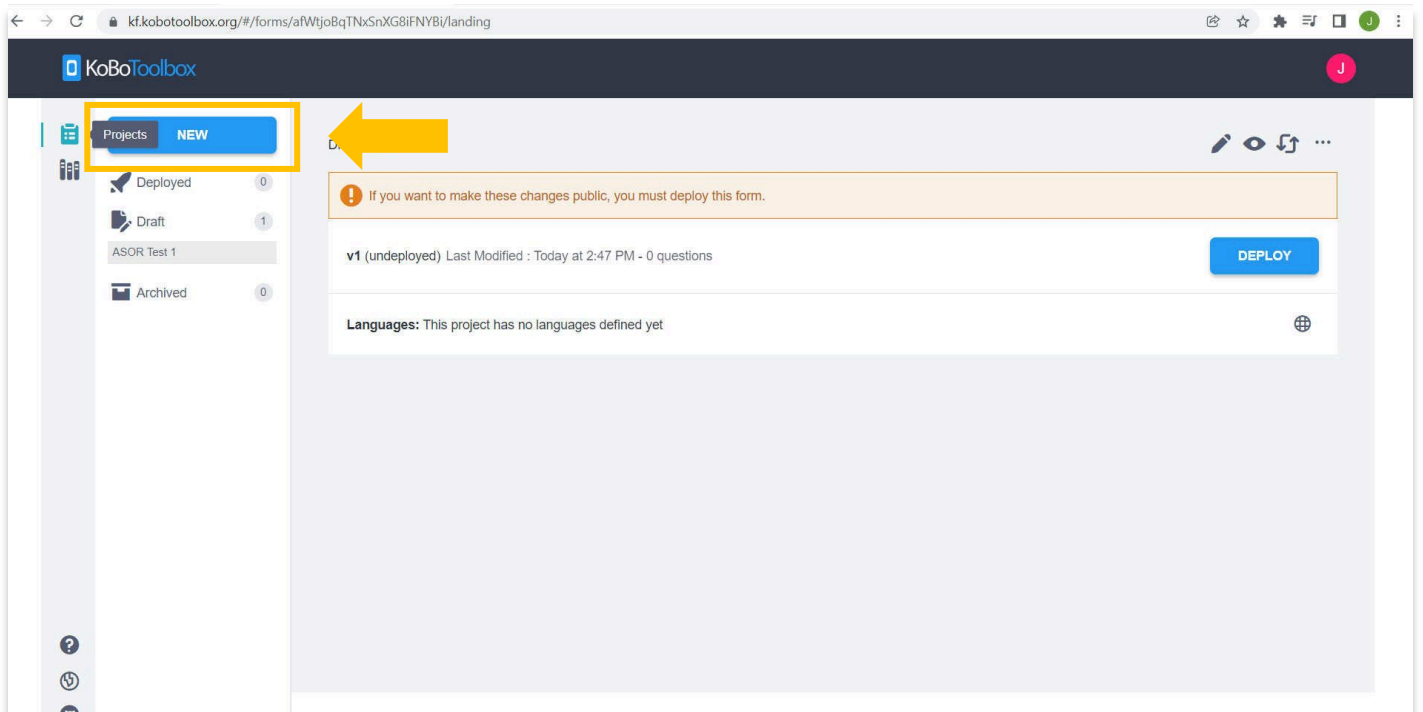
4. A "Create Project" pop-up window will appear. For our purposes, select Build from Scratch.
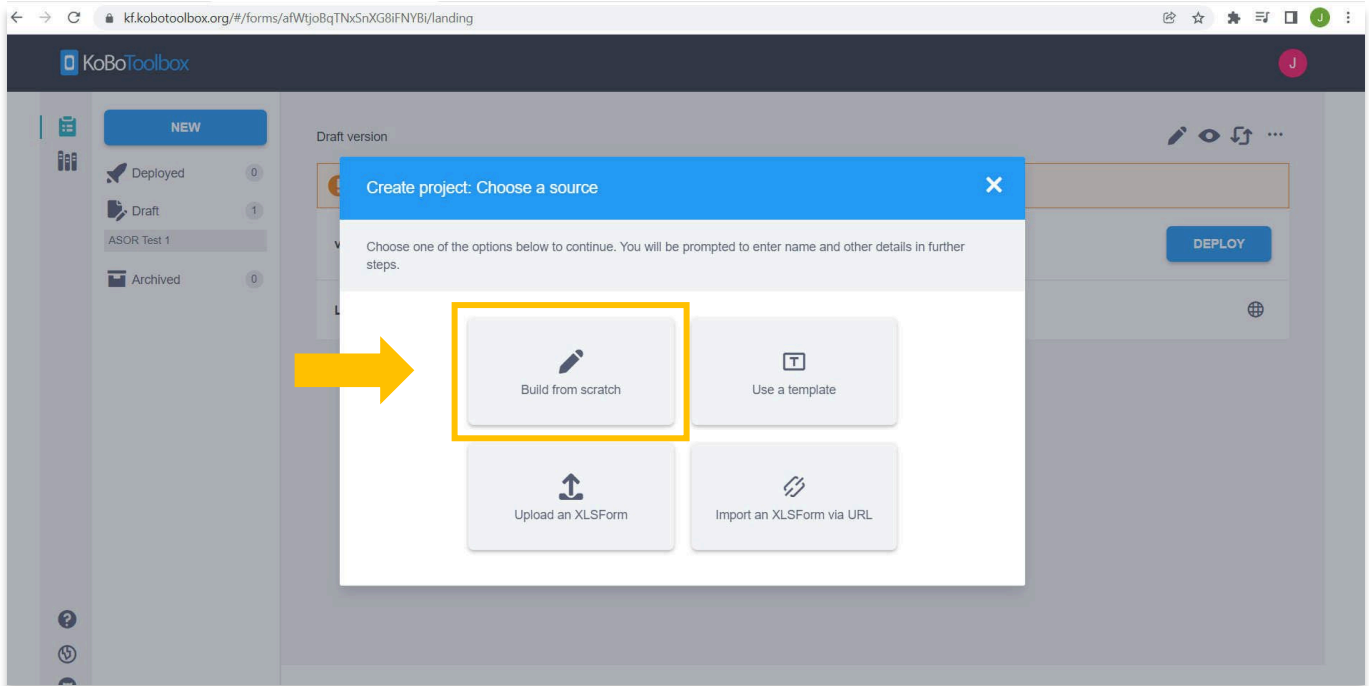
5. Fill out in the information in the field provided. * Note – You do not need to click the box that states, "Help KoboToolBox improve this product…" Once all fields are completed, select the blue Create Project button.

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.
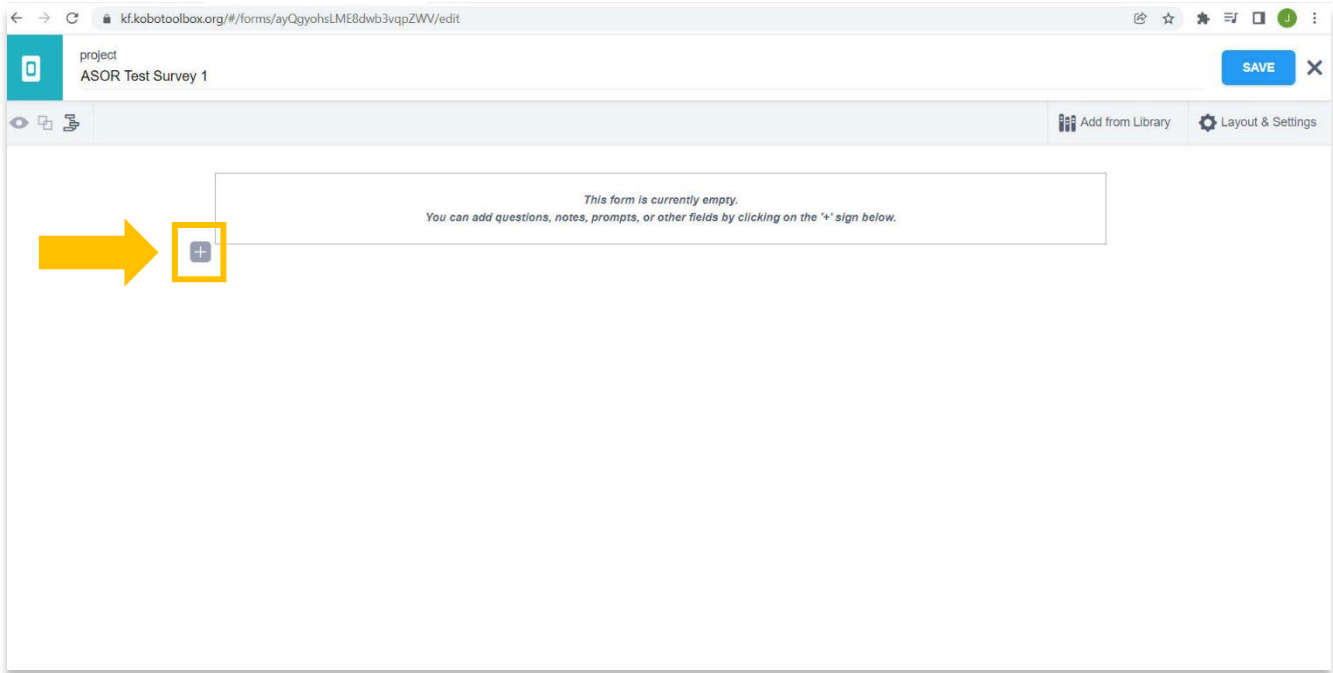
7. Here you can add any type of question or field name that would be useful for your survey. For example, add a field named, **Site Name**, then select the green +Add Question button.
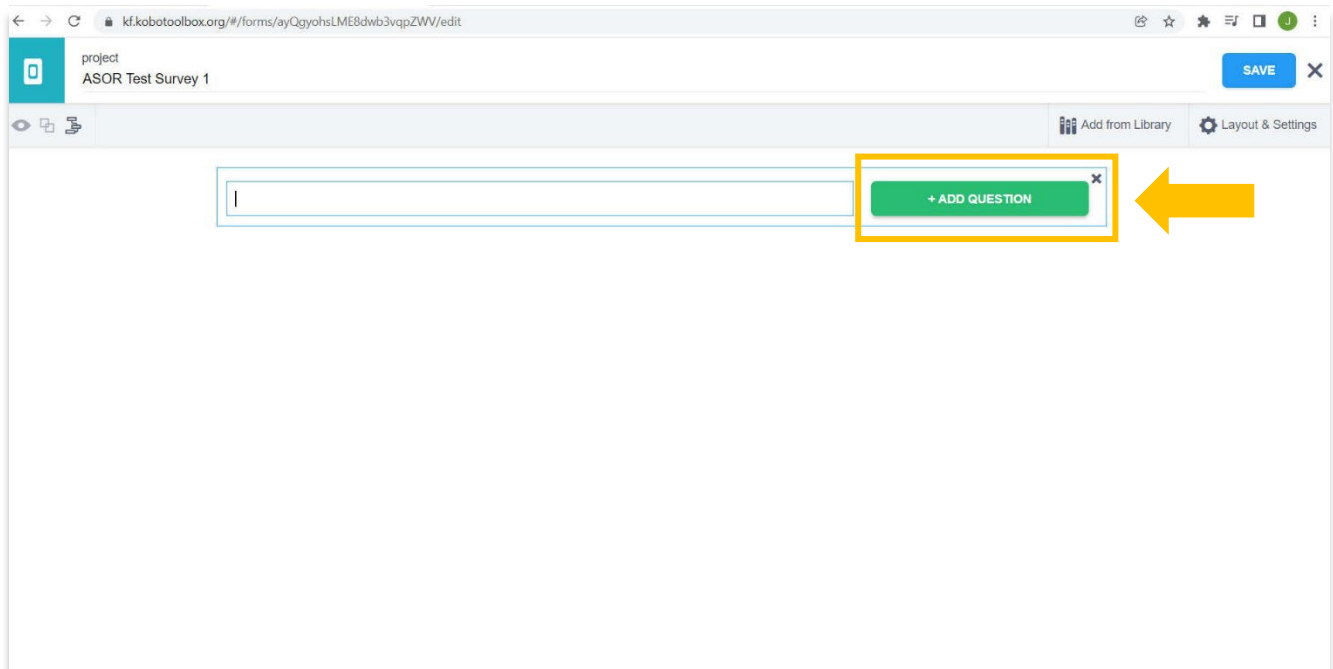
8. A drop-down will appear that allows you to choose the structure of the field. There are many ways you could design each field. Select Text for the Site Name field. This will allow users to enter text in the response.
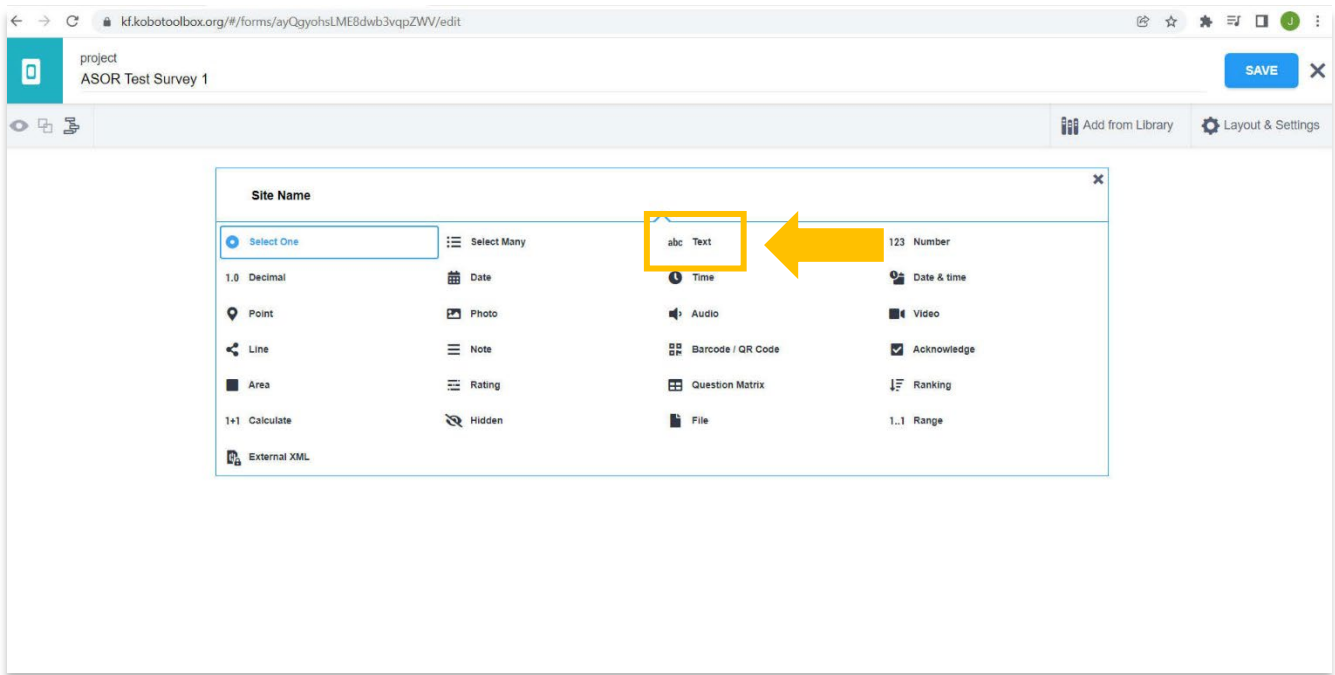

9. You can add more questions for every type of information that you wish to collect. Another useful field would be Site Location. By selecting Point, you can record a geographical coordinate.
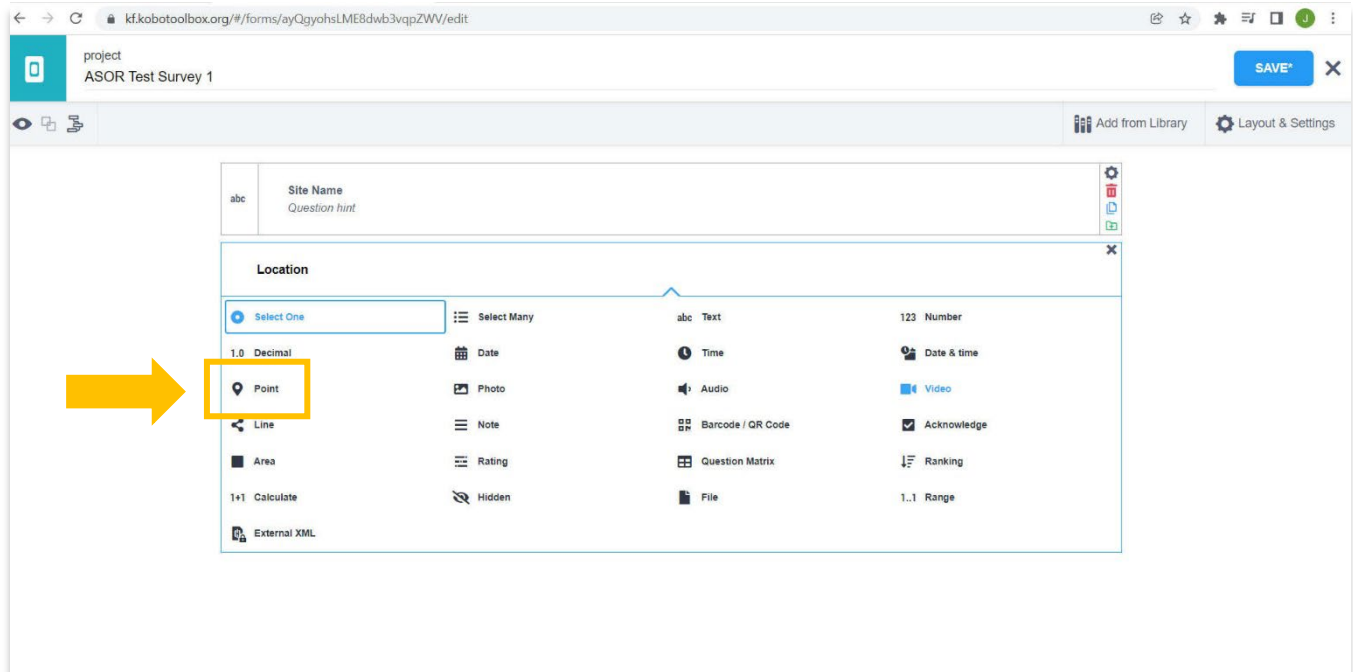
10. Another field that would be useful is **Site Type**. For this, you can select an option that controls the specific options or vocabulary used in the survey.

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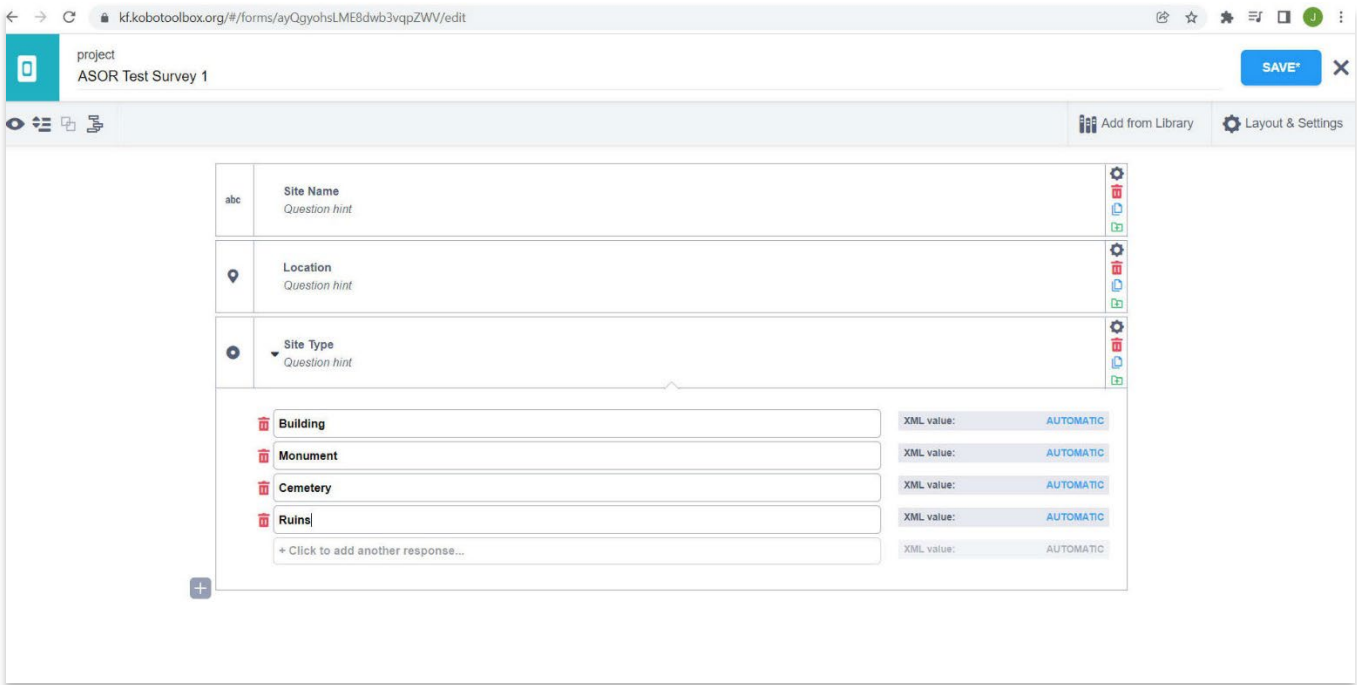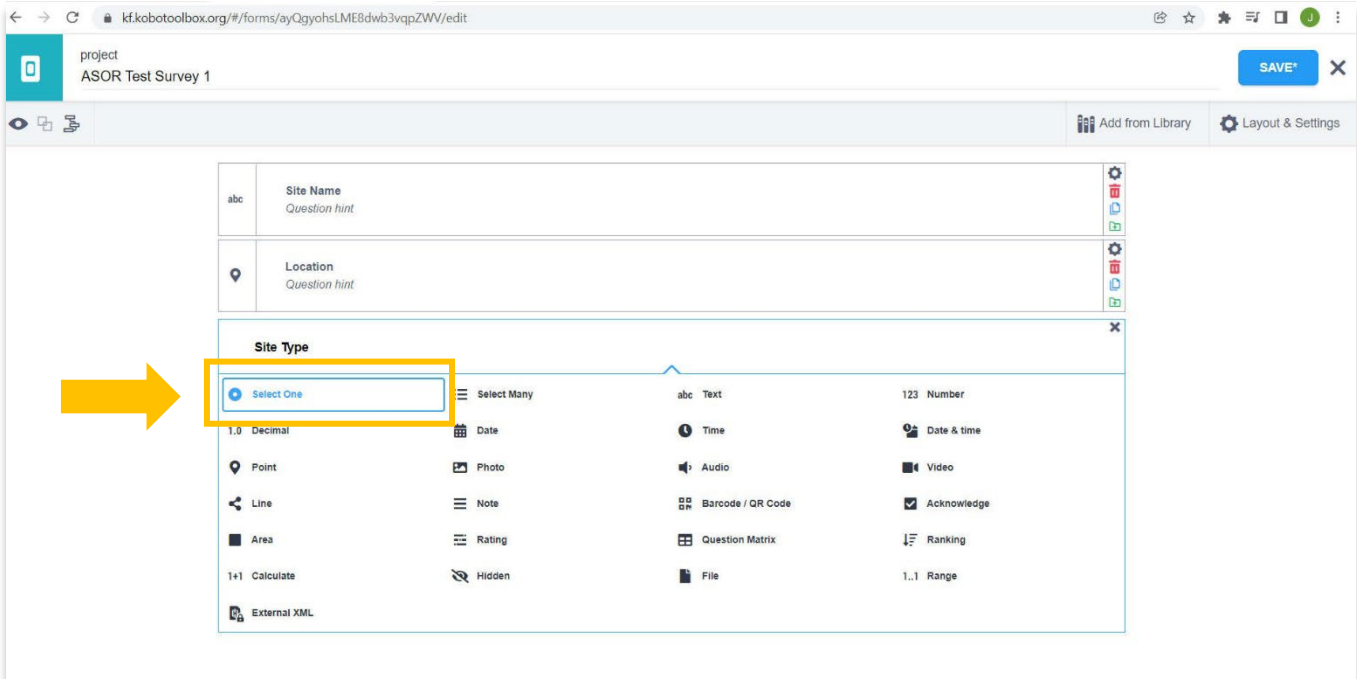
11. Each question will appear on the form in the order that you created them. You can change the order of questions by dragging questions up and down.
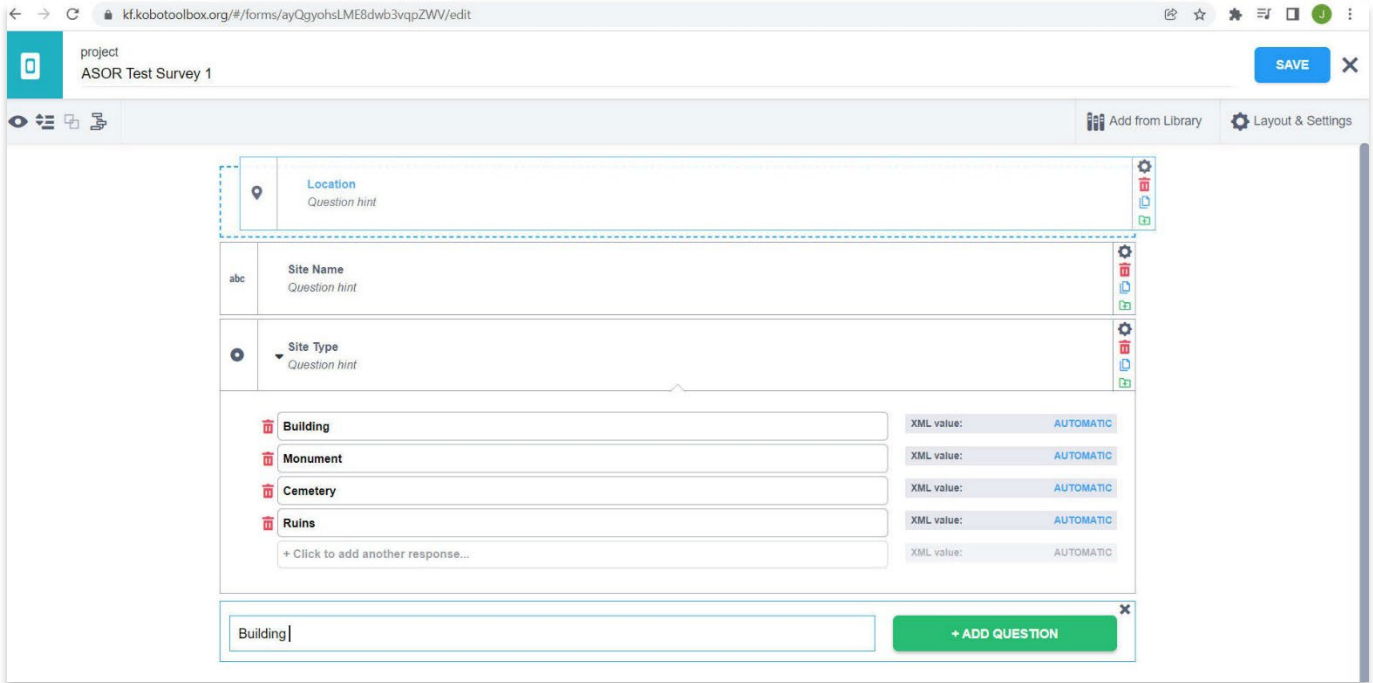

12. Additional information you may wish to collect:
    a. Street Address (if known) – Text in dropdown
    b. Date/Time of Recording – Date & Time in dropdown
    c. Photos – Photo in dropdown
    d. Building material – Select One in dropdown
    e. Current Condition – Text in dropdown

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.
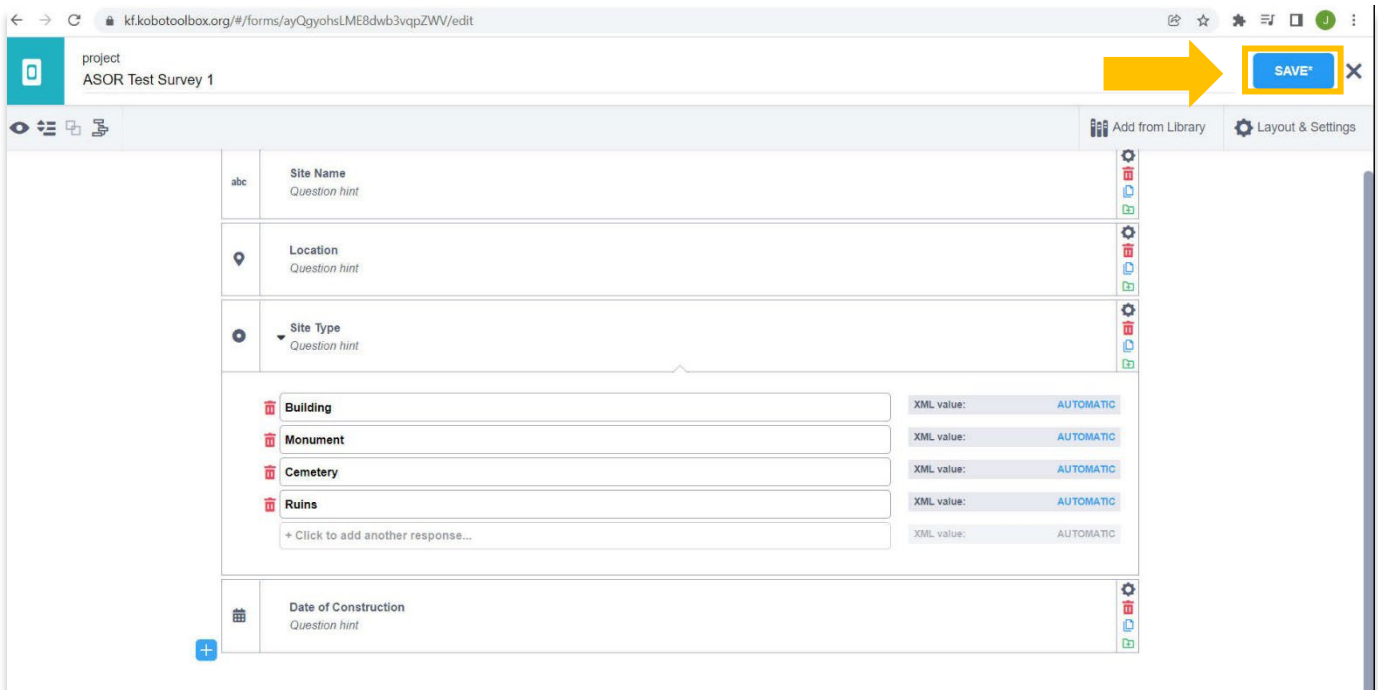

14. Once finished adding questions to your form, click on the blue icon in the top left corner to return to your dashboard and view all your projects.
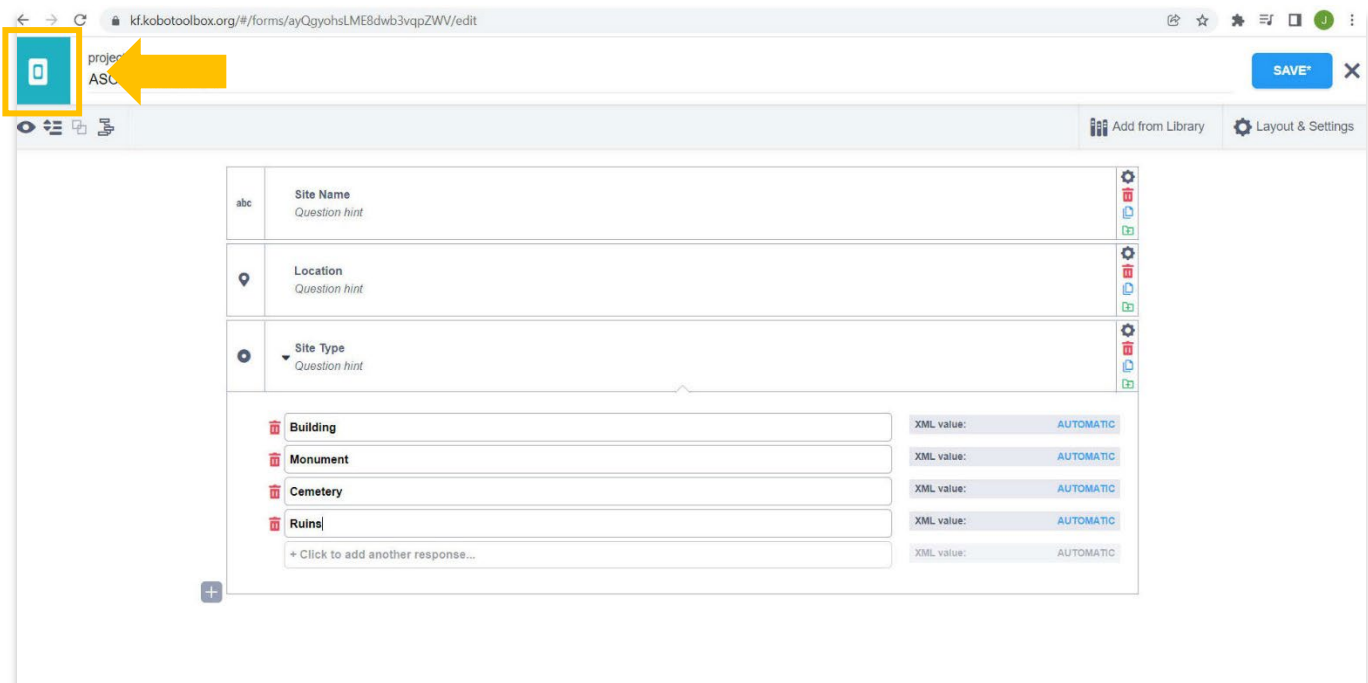
GRANTING EDITTING PERMISSIONS TO OTHER USERS

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.
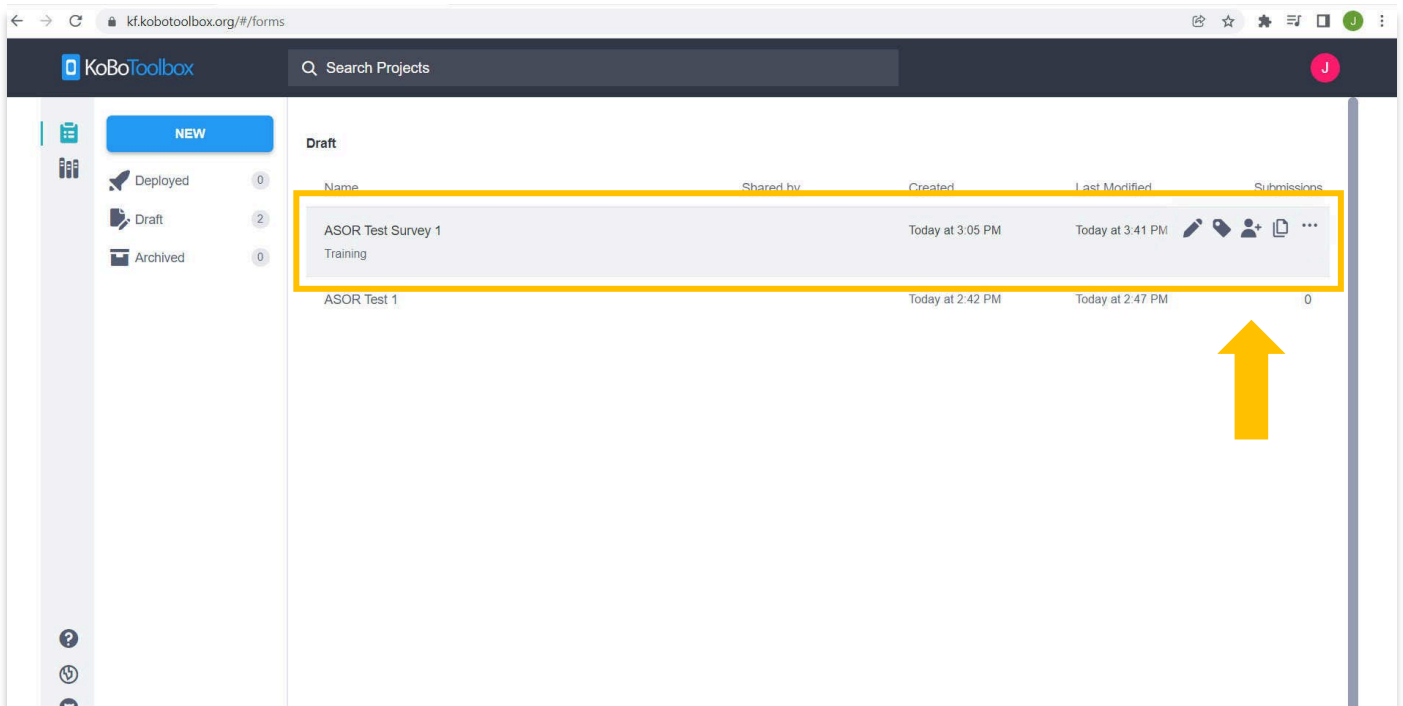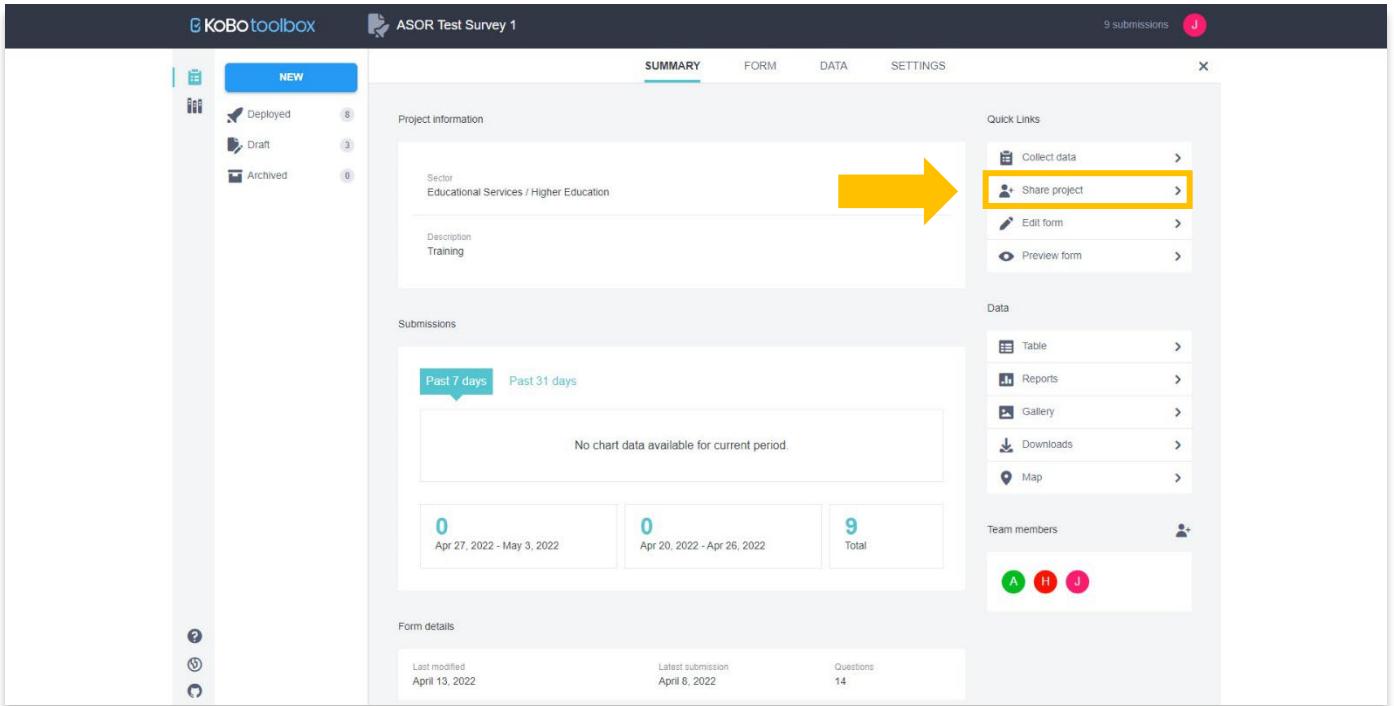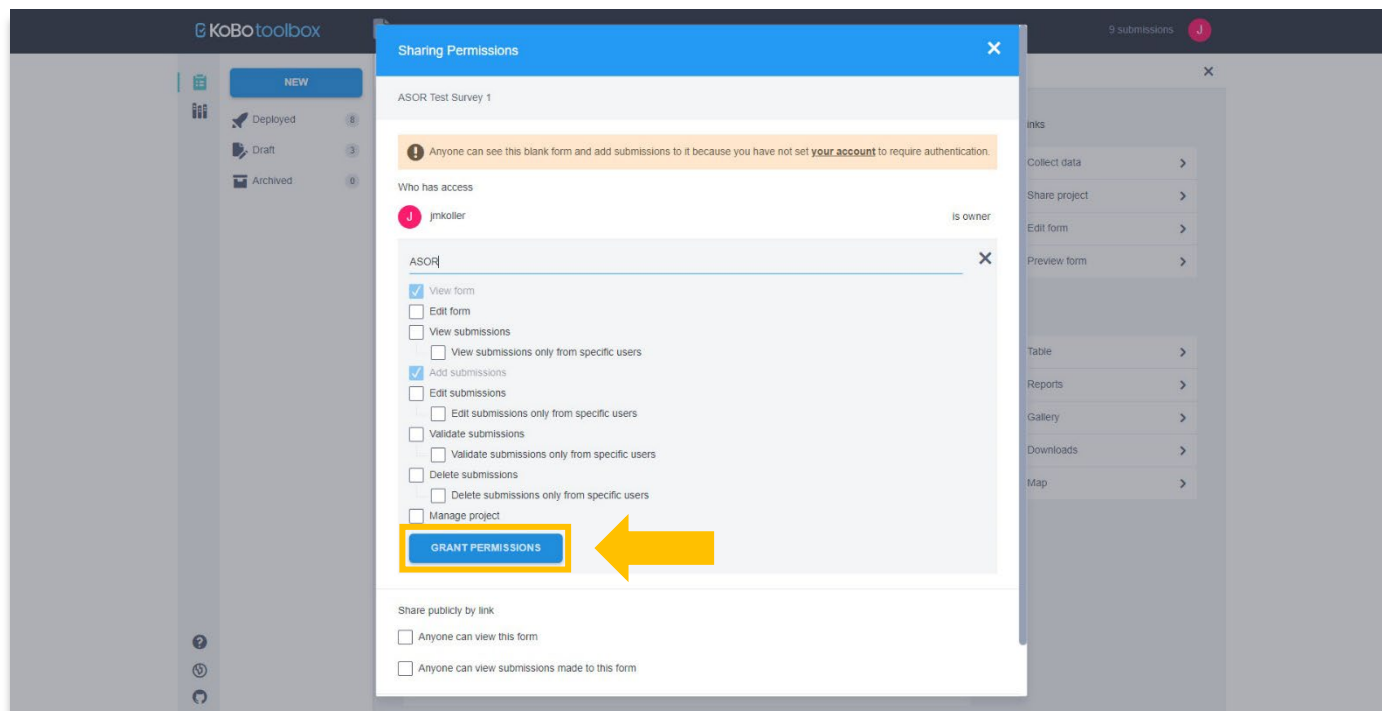
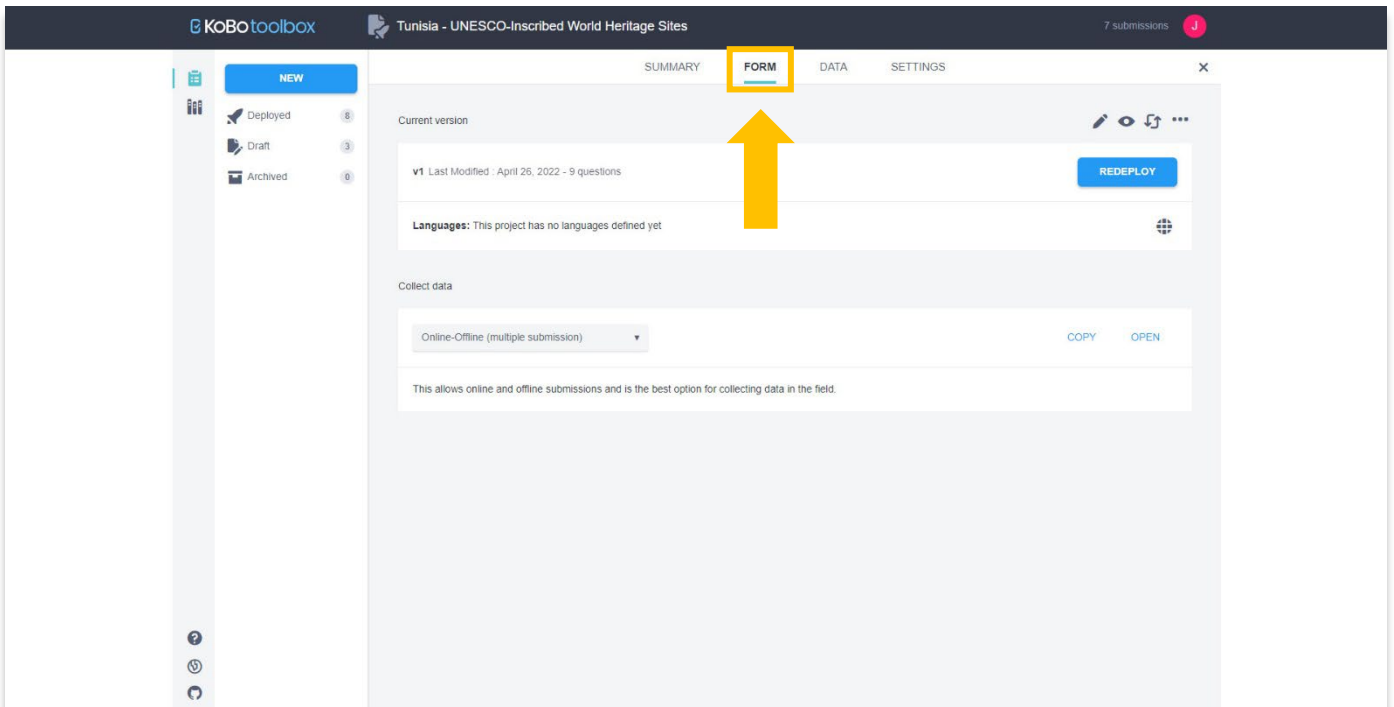16. Choose the **Add User** button to give project permissions to another user.
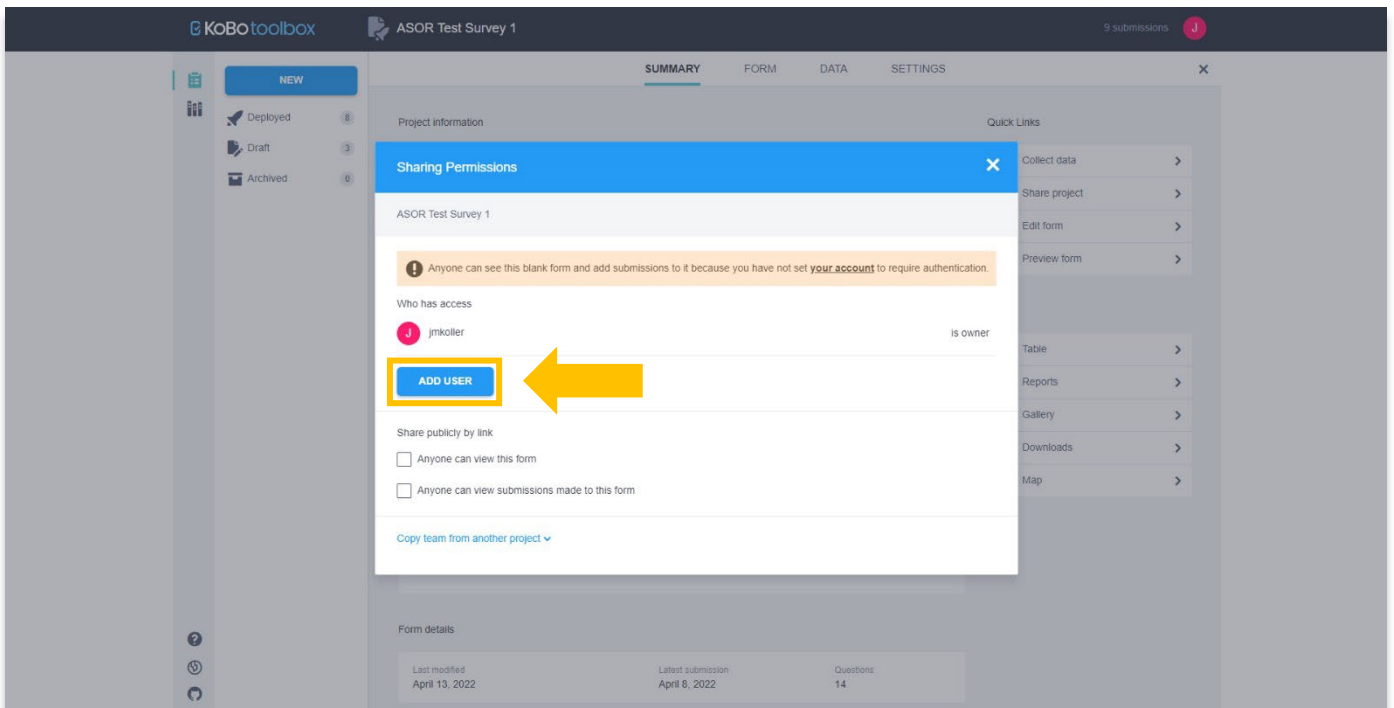
17. Add the username (not email address) and set the permission levels in the pop-up. Once completed select the Grant Permissions button.
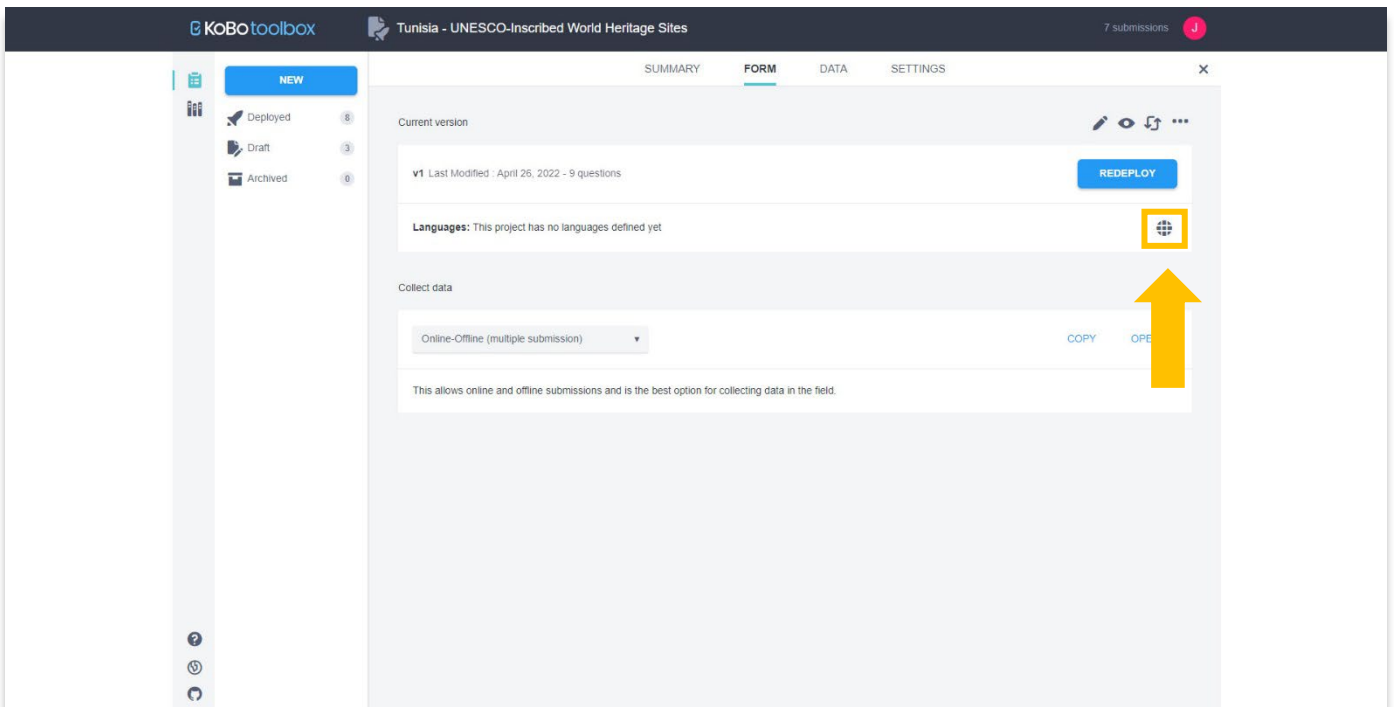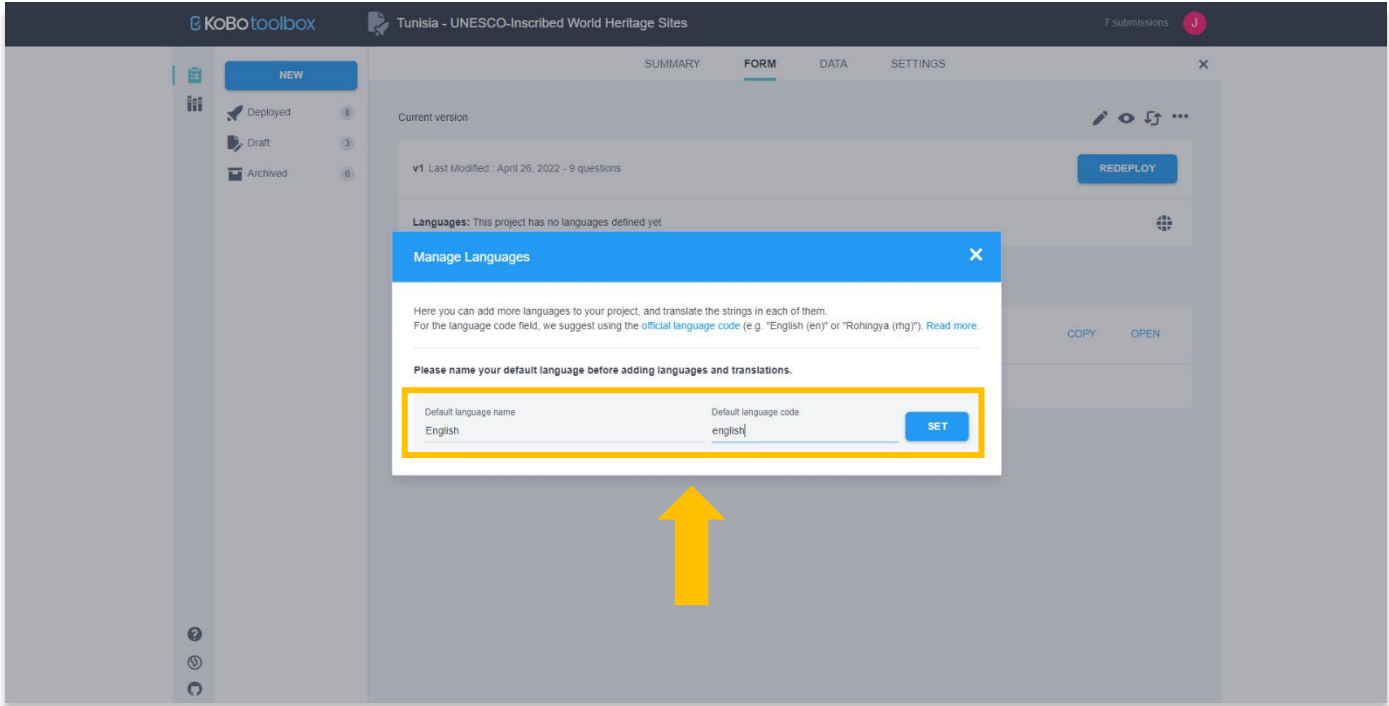
LANGUAGE SETTINGS

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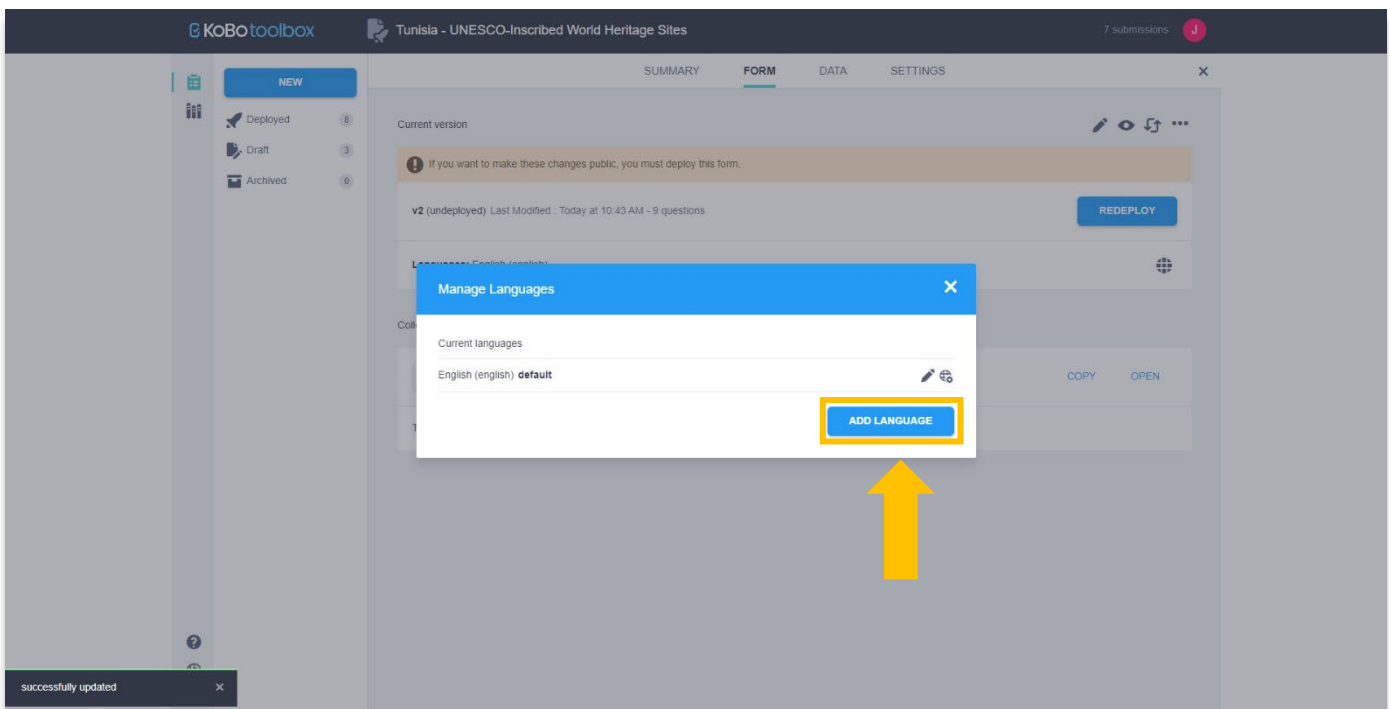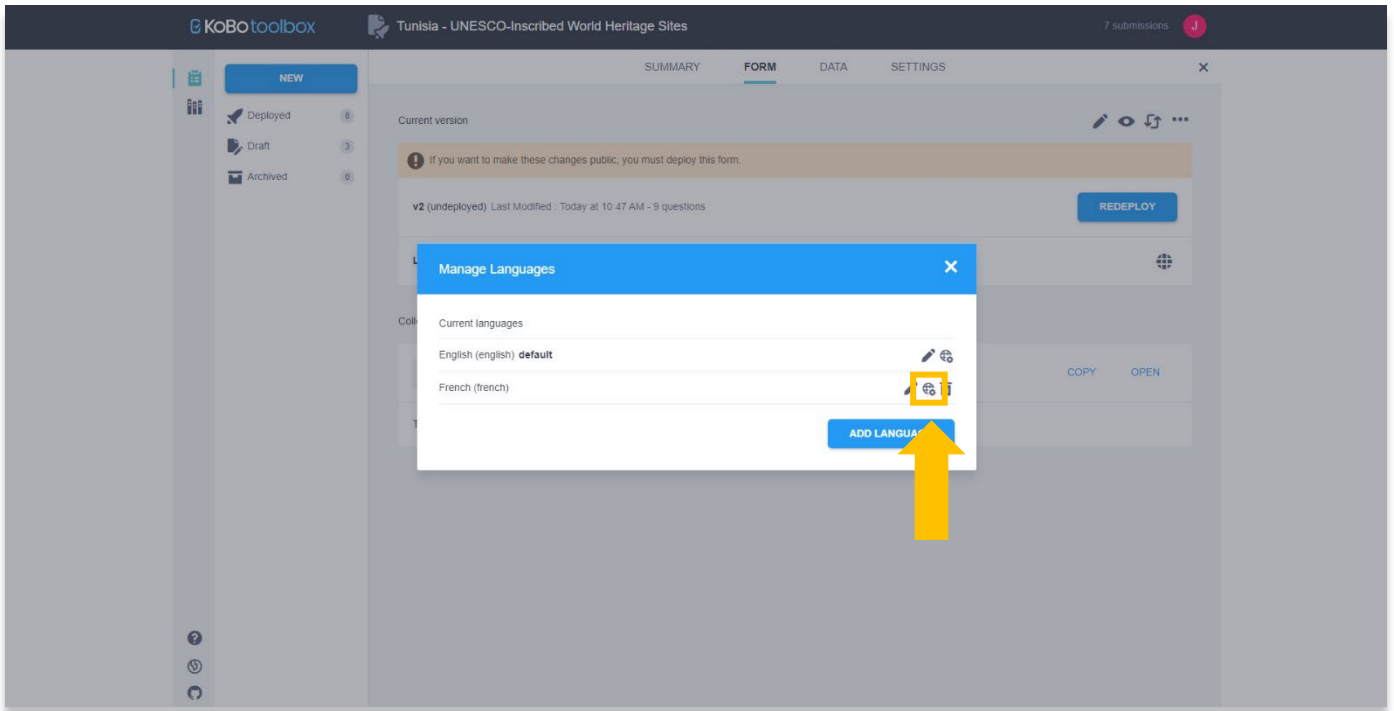

19. Select the Language Icon. ⊕

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.
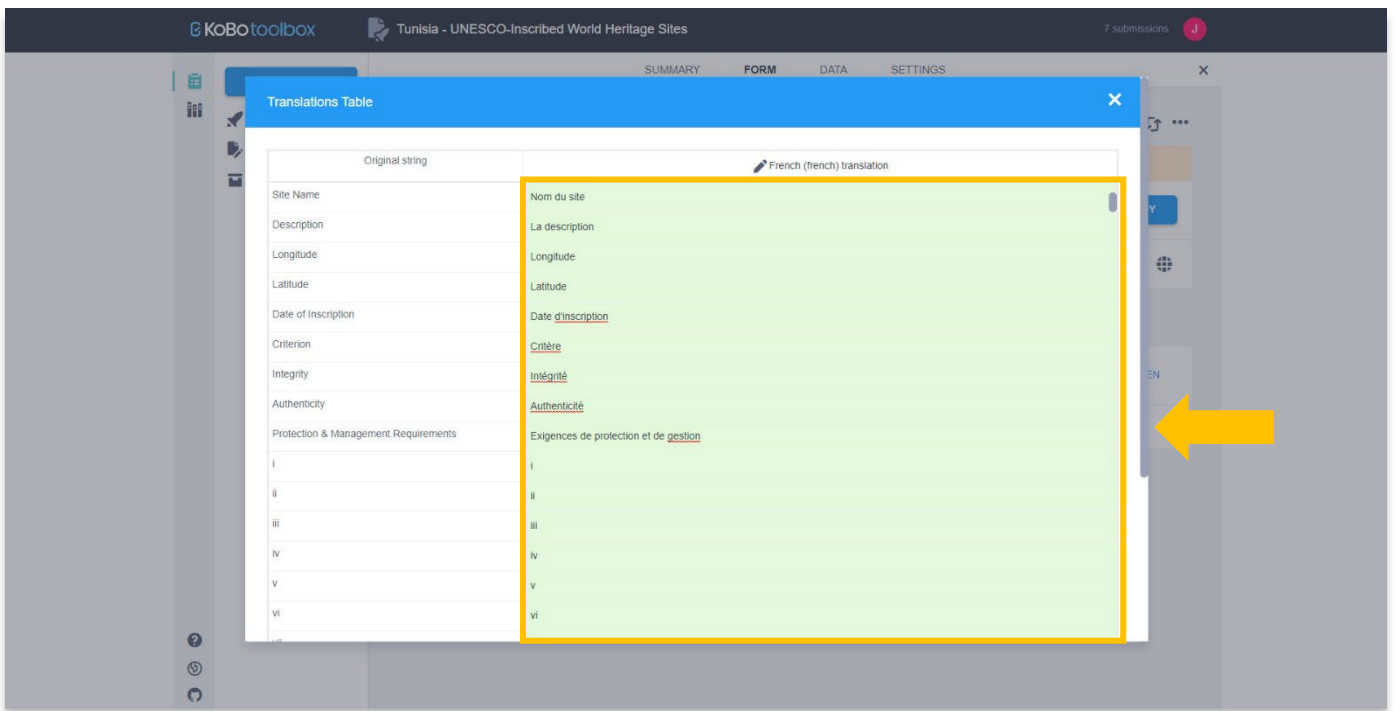
24. Select the Save button at the bottom when you are finished adding translations. A message will appear at the bottom left of your browser confirming that the translations have been saved. Close the pop-up to return to the project page.
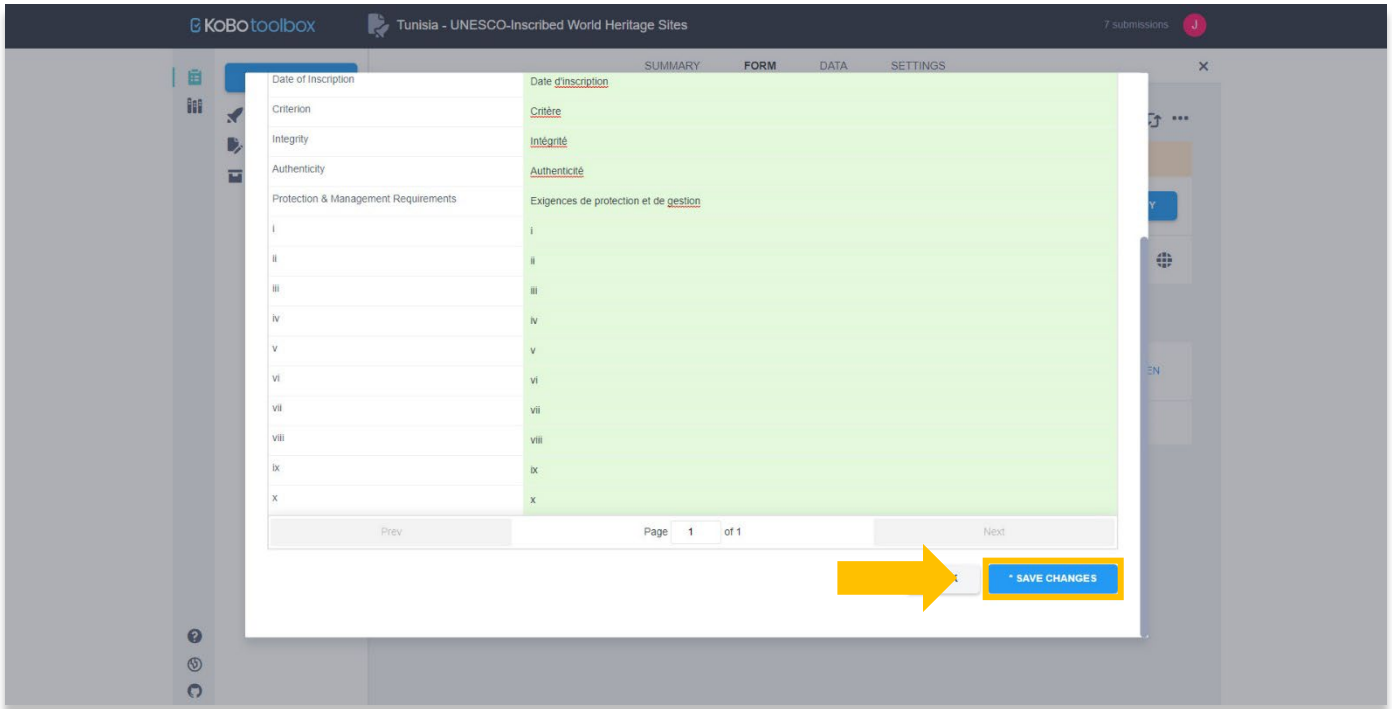
25. Select the Preview button. 👁
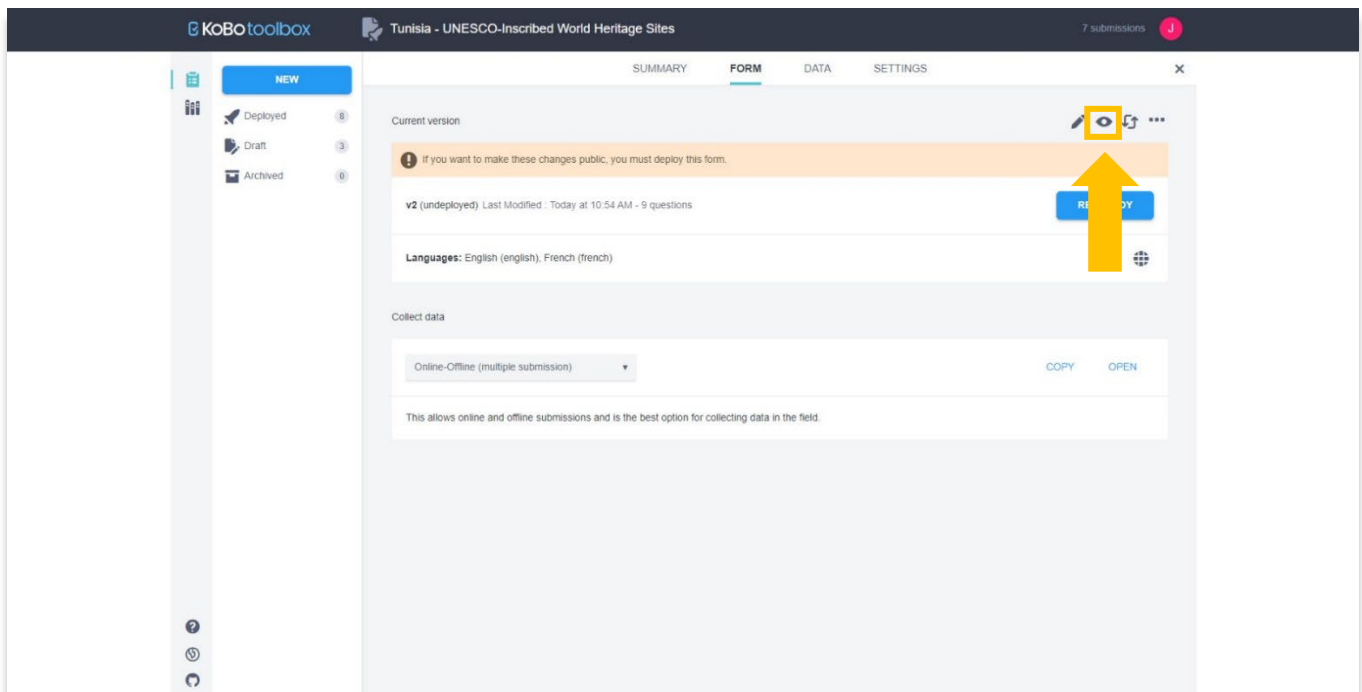
26. A drop-down menu will now appear on your form that allows you to choose a language. Additional languages can be added by repeating steps 21 through 24 of this tutorial.

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CULTURAL HERITAGE INITIATIVES
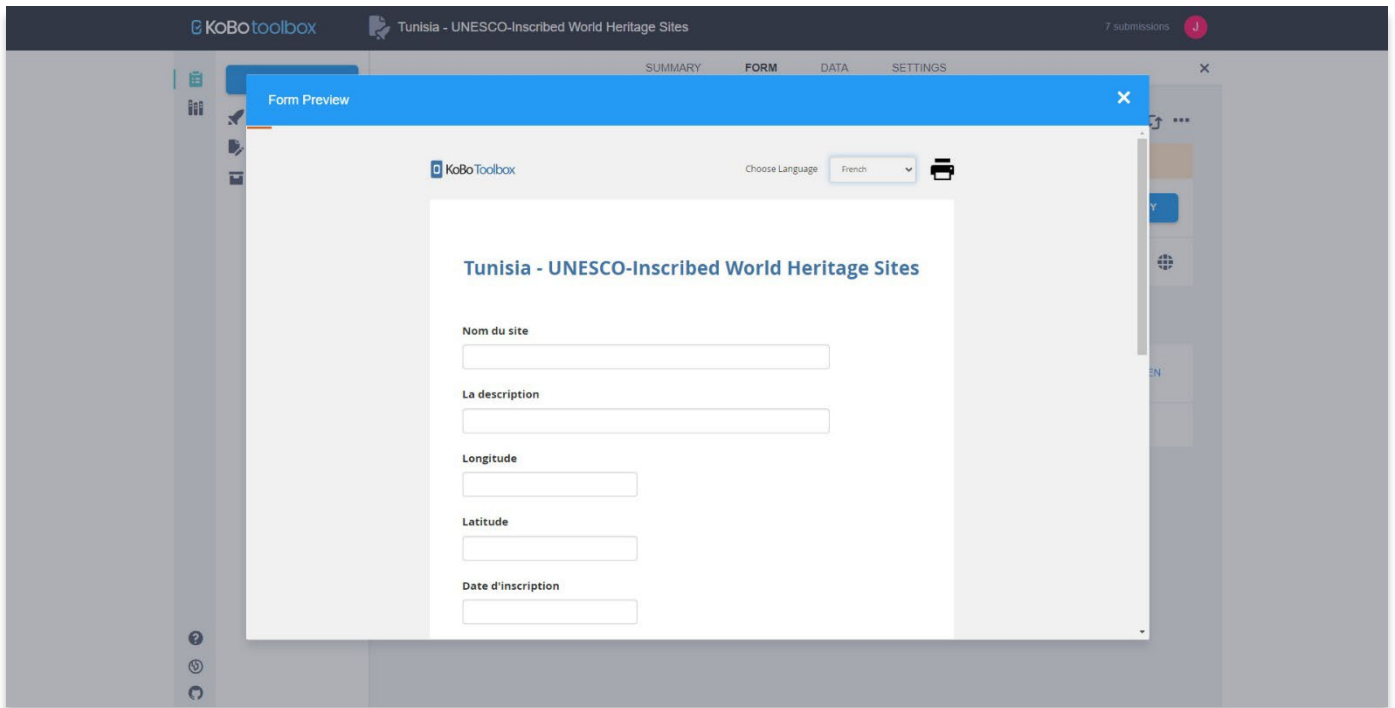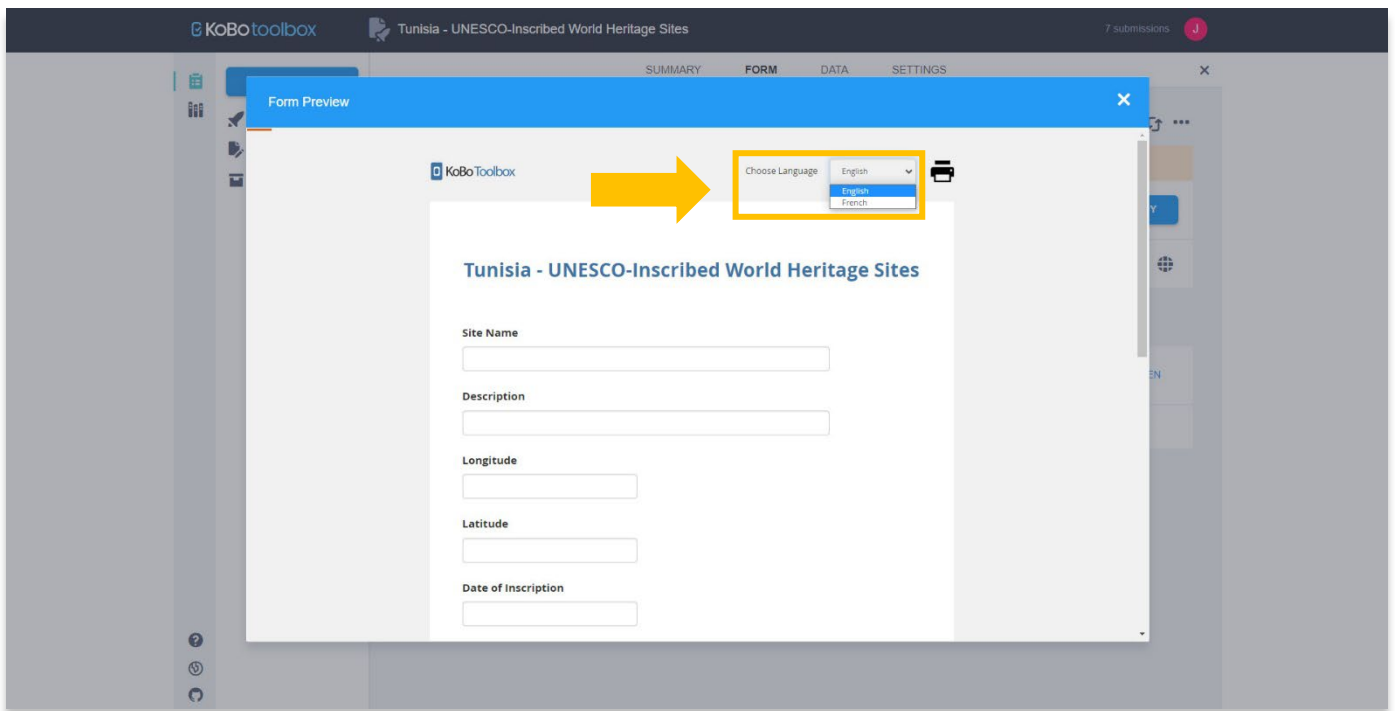
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