



# ASOR Cultural Heritage Initiative

KoboToolbox & KoboCollect

## Module 01.02: Creating a New Survey Form

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## ASOR KoboToolbox Module 01.02 – Creating a New Survey Form:

### Adjusting Languages and Toolbars

KoboToolbox is a free and open-source software package for collecting location and descriptive data. 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 synced with GIS software once an internet connection has been reestablished.

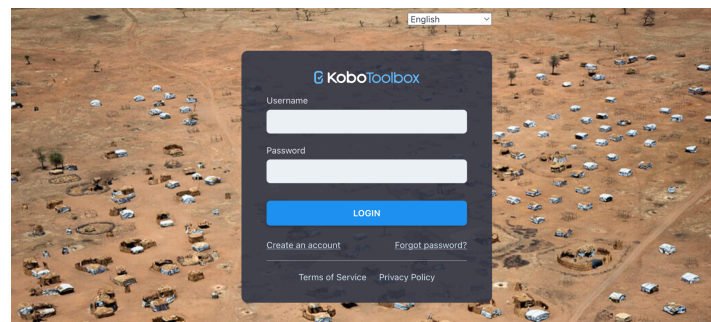
This **ASOR Tutorial (01.02)** will cover how to navigate the KoboToolbox interface, including the settings menu, language preferences, toolbar, and guide you through creating your first survey form in KoboToolbox.

## KEY CONCEPTS

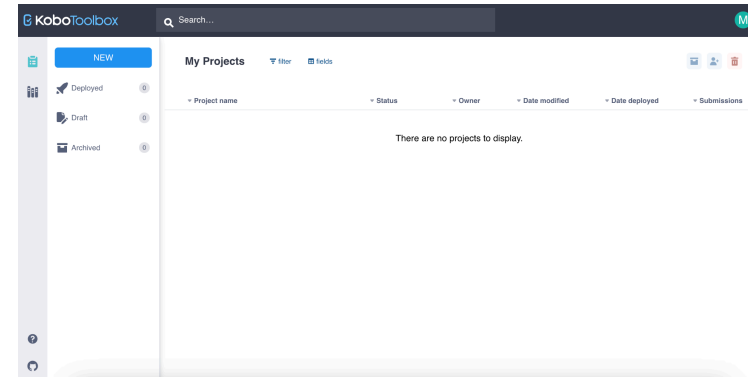
- ❖ Learn to toggle language settings.
- ❖ How to access the main dashboard.
- ❖ Navigating security to change username and password.
- ❖ Understanding usage limits for free and paid accounts.
- ❖ Building forms to structure future data collection.
- ❖ Creating a form from scratch.
- ❖ Understanding question components (name and type).

## CREATING A NEW PROJECT FORM

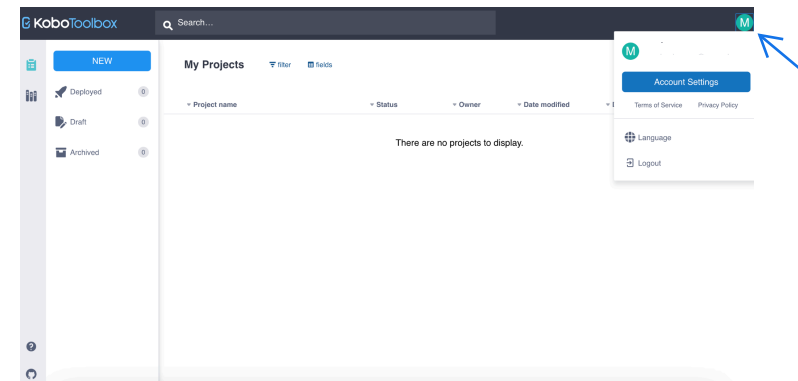
1. Log in to your KoboToolbox account:  
<https://kf.kobotoolbox.org/accounts/login/>. Use your Username and Password created in [ASOR Tutorial 01.01 \(Creating a KoboToolbox User Account\)](#).



2. Once logged in, you will be directed to your KoboToolbox **Dashboard**. The Dashboard organizes all of your projects. After your first login, your dashboard will be empty.



3. Choose your **profile icon** in the top right to access the software settings. Then choose Account Settings.



**Language** | You can adjust the language for the entire interface if you prefer to use a language other than English.



Account Settings

[Terms of Service](#)

[Privacy Policy](#)



**Profile** | Here you can make changes to your account information.

**Security** | You can change your password and your email address associated with your KoboToolbox account.

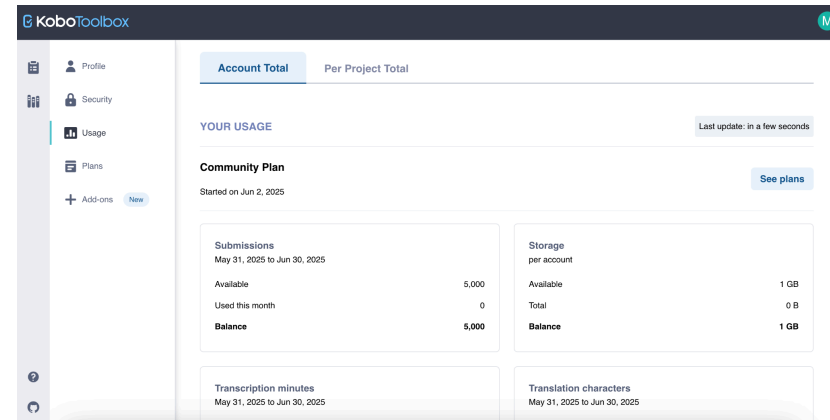
The screenshot shows the 'SECURITY' section of the KoboToolbox user interface. On the left is a sidebar with icons for Profile, Security, Usage, Plans, and Add-ons. The main content area has a 'Password' field with a masked password and an 'Update' button. Below it is an 'Email address' field with a placeholder 'Type new email address' and a 'Change' button. An 'API Key' field with a masked key and a 'Display' button is also present. A 'Two-factor authentication' section shows a toggle switch set to 'Disabled' and a message: 'Two-factor authentication (2FA) verifies your identity using an authenticator application in addition to your usual password. We recommend enabling two-factor authentication for an additional layer of protection.' A grey box below states: 'This feature is not available on your current plan. Please visit the Plans page to upgrade your account.' At the bottom, there is a 'RECENT ACCOUNT ACTIVITY' section with links for 'Log out of all devices' and 'Export log data'.

**Plans** | There are advanced plans to choose from (for a monthly fee) if you need more storage.

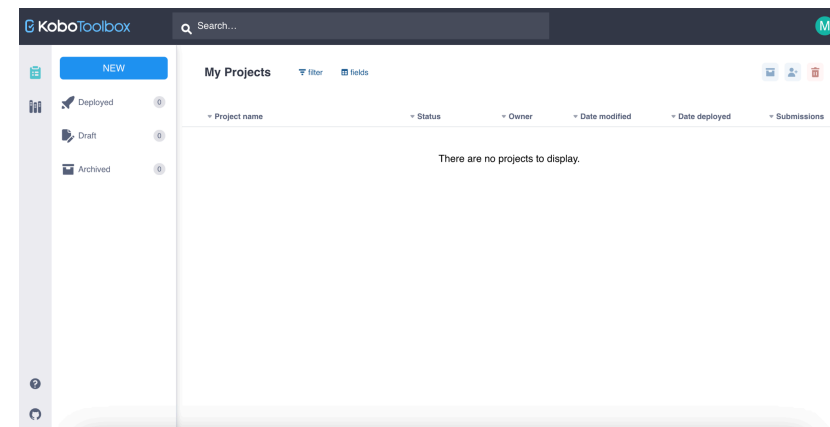
The screenshot shows the 'Plans' section of the KoboToolbox user interface. The sidebar is the same as in the previous screenshot. The main content area has tabs for 'Monthly' and 'Annual'. Under the 'Monthly' tab, there are two plan cards. The 'Community' plan is 'Free' and includes: 5,000 submissions /month, 1 GB file storage, Unlimited projects / forms, Unlimited data collectors / collaborators, and Online / offline data collection. The 'Professional' plan is '\$159.00 USD/month' and includes: 25,000 submissions /month, Unlimited file storage, Unlimited projects / forms, Unlimited data collectors / collaborators, Online / offline data collection, and Support our open source development. An 'Upgrade' button is at the bottom of the Professional plan card. A link 'Display full comparison' is at the bottom right.

**Usage** | Track how much data you are collecting every month.

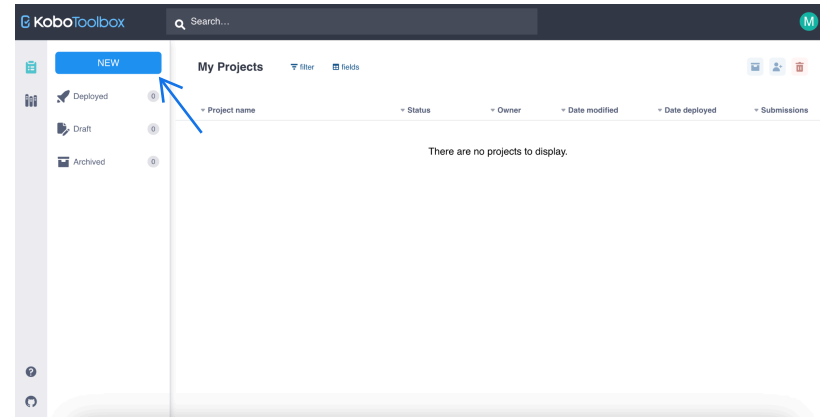
*\* KoboToolbox only allows 5,000 entries per month and 1GB of storage for its free tier. If you are using the free tier, please be mindful of the amount of data you are using. KoboToolbox is well-suited for data; however, it is not a long-term data storage solution.*



4. Back to the dashboard to create a new survey form.



5. Select the blue **New** button to create a new project from the main dashboard.



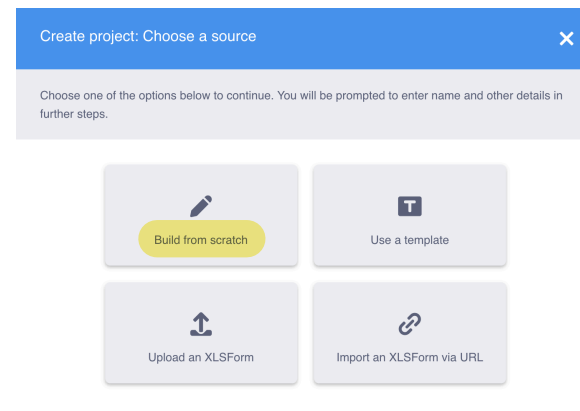
6. In the pop-up window, four options appear:

**Build from Scratch** | Use this option when creating an entirely new form.

**Use a Template** | You can save any project form as a template. Choose this option if you have already created a form and wish to use it again.

**Upload an XLS Form** | Upload a Microsoft Excel Form. See [here](#) for further documentation.

**Import an XLSForm via URL** | Upload a Microsoft Excel Form using a URL instead of a





file on your local computer. See [here](#) for further documentation.

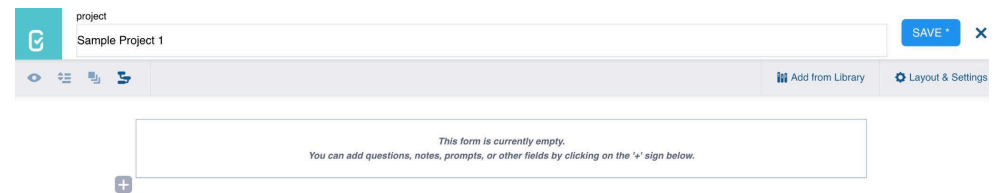
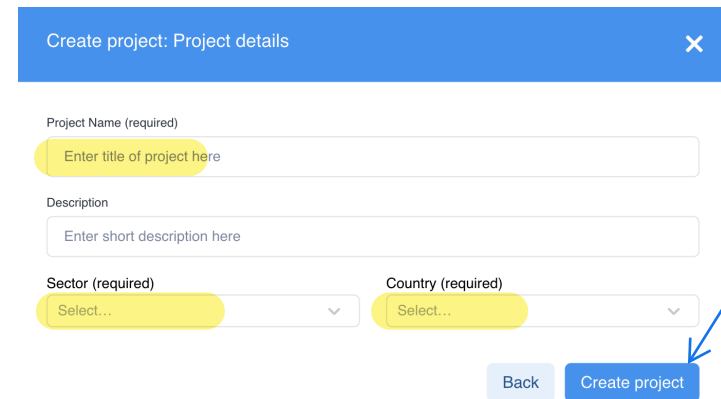
7. Choose **Build from Scratch** for this tutorial. Enter the required information to set up your project.

Once all fields are completed, select the blue **Create Project** button.

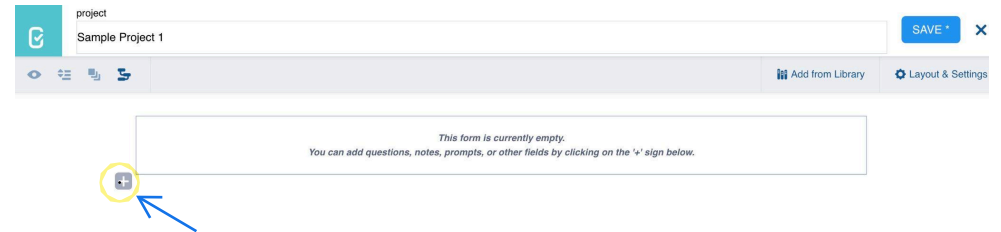
*\* You can change these details at any time, including the project name.*

8. You are now at the new project form. This page will appear empty at first. You can add new questions through this form builder tool. Another way to think about this form is as a database. Instead of creating questions, you can add database fields.

*\* Before you begin, please consider the type of information that you and your partners wish to collect. You will control the phrasing of each question and how KoboToolbox will collect that information (i.e. free text, multiple choice, images...etc.).*

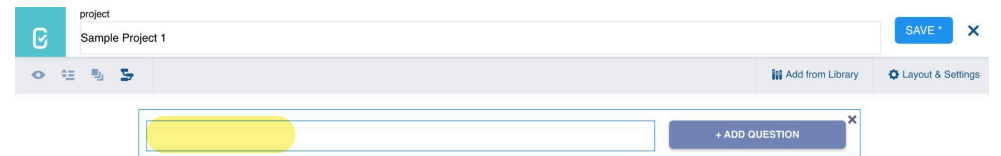


9. To add a new question/database field, select the + icon.

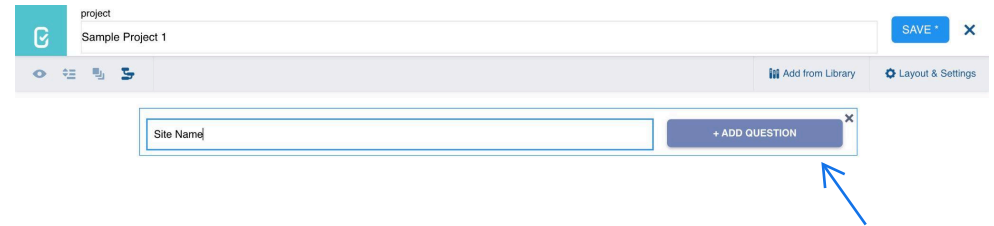


10. Type in the name of your first question or database field. We recommend "Site Name" for your first question.

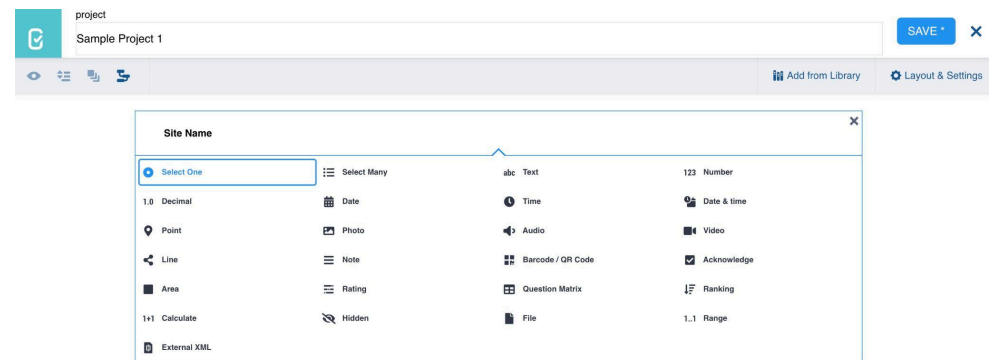
*\* You are only creating the database fields at this point. The data collection will come at a later stage. How you phrase Questions/Database Fields will affect the data you collect. It is important to think not just about what you plan to collect, but how you will collect the data using the questions created in this form.*



11. Select the blue **+Add Question** button after you have named the question.

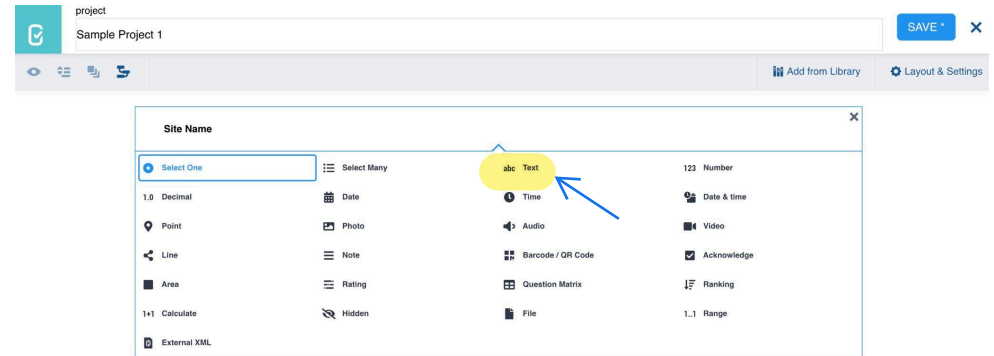


12. A drop-down will appear with many options about how information will be collected. We encourage you to explore all of the question types shown above. This will be further discussed in the next module (01.03).



13. For the first example (Sample Project 1), we will choose **Text**. This question type will allow you to write any text or numbers you wish when collecting data, which will work well for a question like “Site Name” because each entry will have a unique name.

*\*Always save after every question you create*



14. Be sure to **save** after every question you create.



## RESOURCES

Importing XLS with URL: [https://support.kobotoolbox.org/xls\\_url.html](https://support.kobotoolbox.org/xls_url.html)

Importing XLS with form: [https://support.kobotoolbox.org/getting\\_started\\_xlsform.html](https://support.kobotoolbox.org/getting_started_xlsform.html)

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

KoboToolbox Support: <https://www.kobotoolbox.org/help/>

KoboToolbox Login: <https://kf.kobotoolbox.org/accounts/login/>

Previous Module (1.01): <https://chi-kobo.events.asor.org/portals/0101CreatingAUserAccount>

Next Module (1.03): <https://chi-kobo.events.asor.org/portals/0103SurveyFormQuestionTypesDatabaseFields>



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