ASOR Cultural Heritage Initiative

KoboToolbox & KoboCollect

Module 01.04: Creating a New Survey Form: Advanced Features

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ASOR KoboToolbox Module 01.04 – Creating a New Survey Form:

Advanced Features

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 (01.04)** is built for advanced Kobo users. Learn how to create hierarchies among your form questions (database fields) and how to share projects with other Kobo users.

KEY CONCEPTS

❖ Learn how to reorder questions by dragging them into a new position.

❖ Insert new questions between existing ones using the + icon.

❖ Make questions mandatory so users must answer them before submitting.

❖ Use skip logic to show or hide questions based on earlier responses.

❖ Add translations manually to support multiple languages in your project.

NAVIGATING ADVANCED FEATURES

ADJUSTING QUESTION ORDER

The position of questions (top to bottom) on the final data collection form will correspond with their order on the **Edit Form** page. You can change the order of questions through the following steps:

1. Hover over the icon of any question
2. Left click and hold over it
3. Drag it up and down

You may also insert a new question at any place by selecting the **+** icon that appears upon hovering over any question.
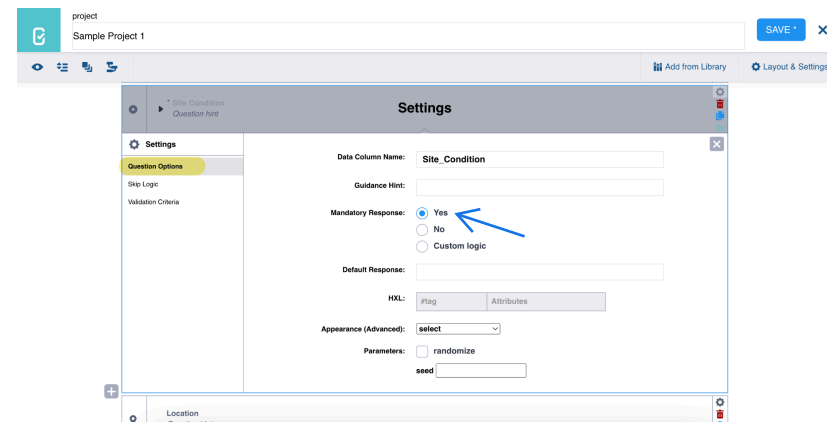
Notice the **icons** located to the right of each question:

1. Settings
2. Trash/delete
3. Duplicate Question
4. Add a question to the library
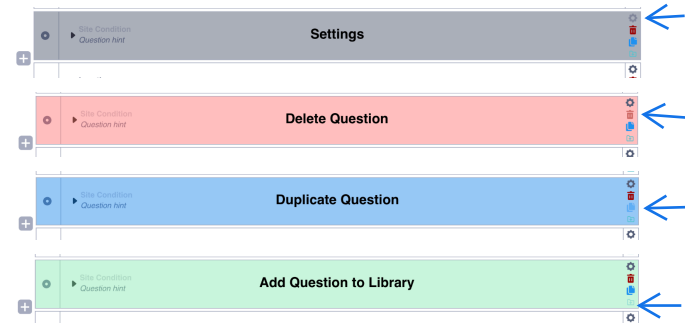
MANDATORY RESPONSE

Choose **Settings** for your Site Condition question. Notice the prompt for **Mandatory Response**. Select "**Yes**" to require users to answer this question before submission.
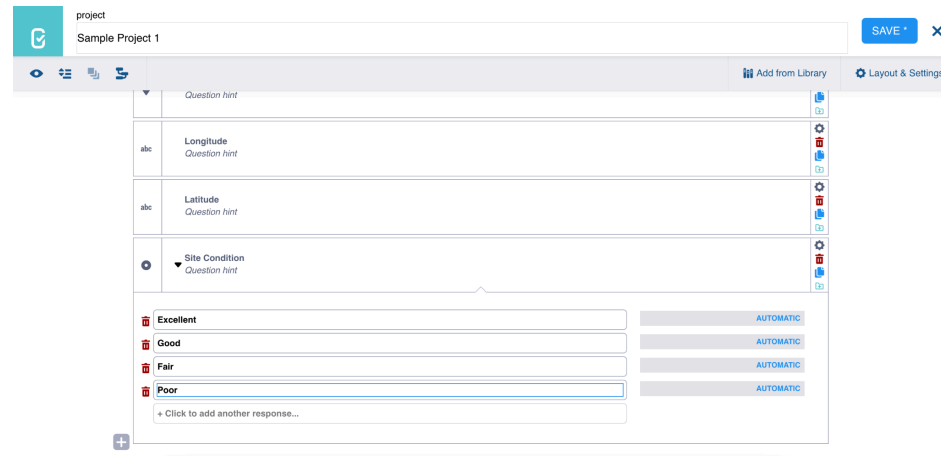
SKIP LOGIC

You may wish to hide some questions if they aren't relevant to all sites that you are documenting.
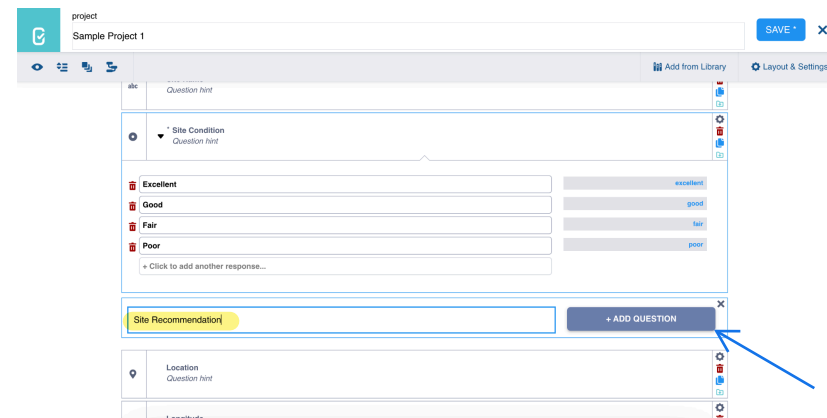
For example, let's return to your **Site Condition** question. When a specific location has been documented as being in "Poor" condition by someone on your team, you may wish to have a new question appear, asking the user to provide recommendations for repair or restoration.

This question does not need to appear if the site is in Good or Excellent condition. Thus, we want the **Site Recommendation** question to only appear when a user answers "Poor." KoboToolbox can do this through skip logic.

Create a new question called **Site Recommendation** just below your **Site Condition** question.
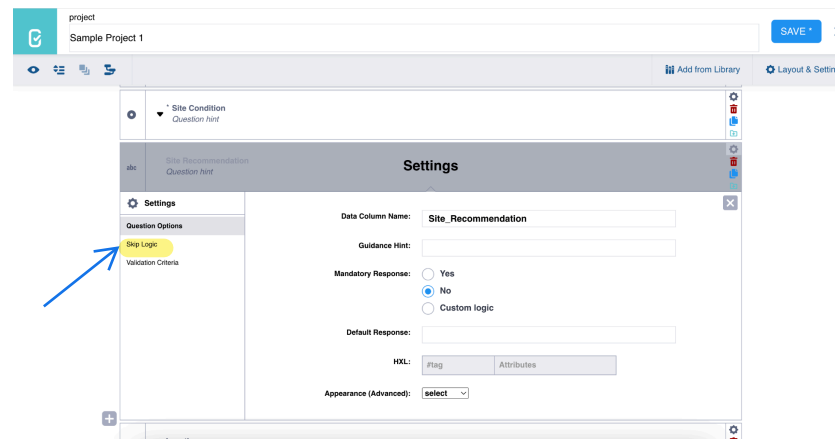
1. Once the question is added, select settings to the right of your Site Recommendation question, then choose **Skip Logic** in the left menu.
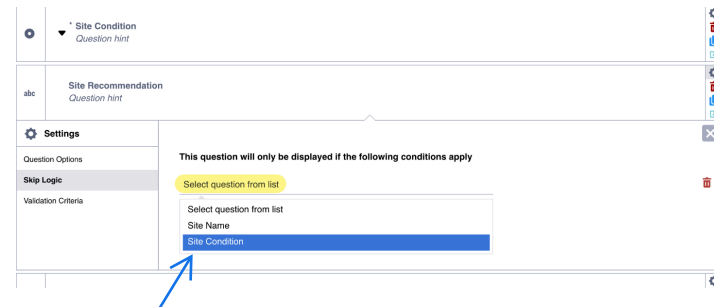

2. Once in Skip Logic, choose **+ ADD A CONDITION**
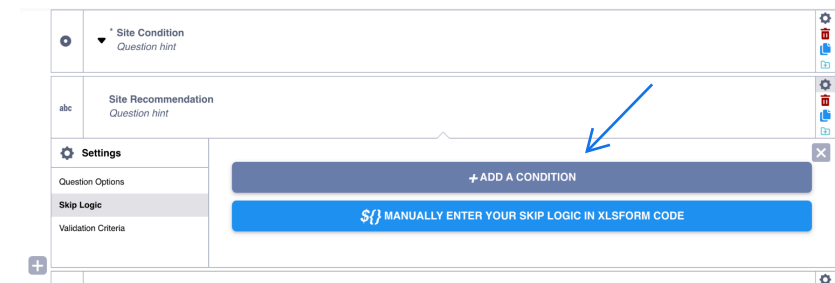
3. A drop-down will appear. Choose Select Question from the list. Then select Site Condition.

   If you do not see **Site Condition** in the drop-down list, ensure that your current question is below **Site Condition** on your form. The order of questions matters, and the drop-down menu only offers questions located above it.
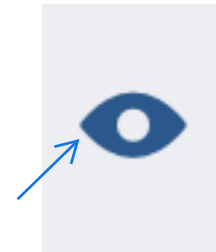

4. Choose **Poor** from the options list. Now your Site Recommendations question will only appear when a use chooses **Poor** in the site condition questions.
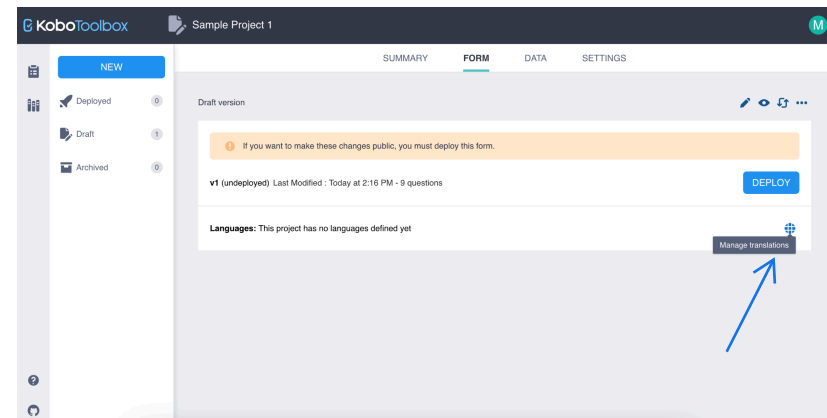
   Always save after every question you create
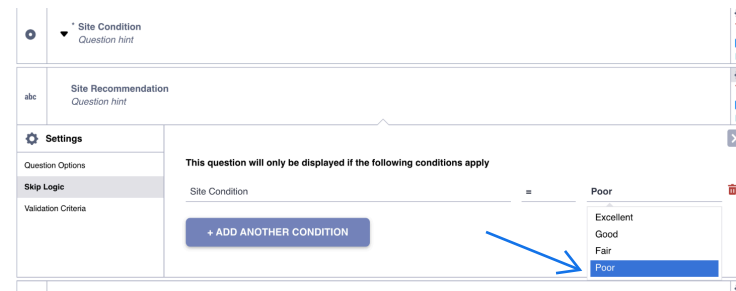
5. Be sure to save your questions. Once done, you can view your form at any time by **selecting the icon that looks like an eye**.

ADD A LANGUAGE

1. Return to **form** then select the **Language Icon** or **manage translations.**

2. Enter the default language for your project. Select the **Set** button.

3. After setting the default language, you can add a second language by selecting the **Add Language** button.
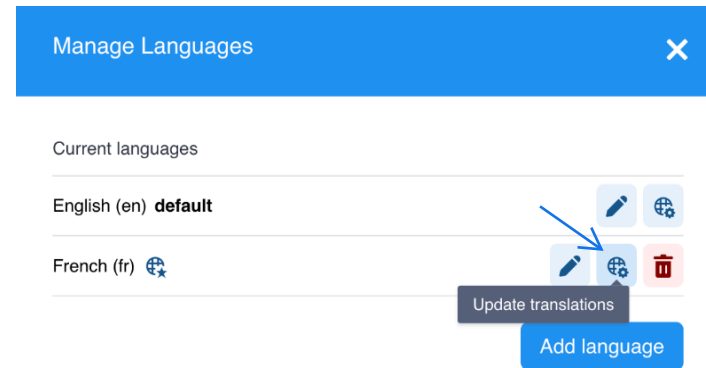
4. Add the language name and code, then select the **Add** button.

5. **Update** the translation button.

6. **Kobo does not translate for you**; Manually type in the translations for each question into the **green column** on the right. Every term in your form will appear in this pop-up, including the answer options created for Select One or Select Many questions.

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


8. It should now be available to view in the preview. 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 3 through 5 of this tutorial.
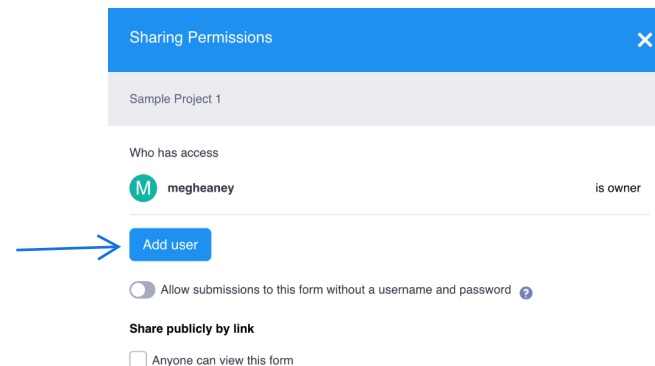
SHARING PROJECT

1. KoboToolbox offers multiple permission levels to users for any given project. The person who created the project is called the **Owner**. The Owner can allow other users to **manage, edit, or access** their project.

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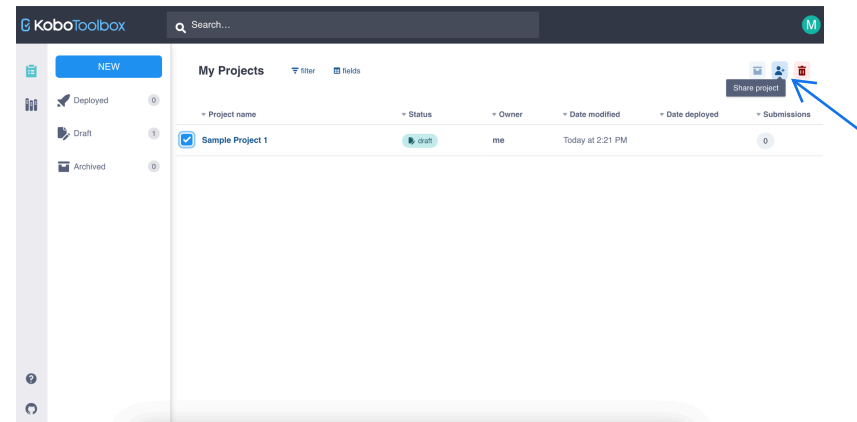
2. Choose the **Add User** button to give project permissions to another user. Add the username (not email address) and set the permission levels in the pop-up. Once completed, select the **Grant Permissions** button.

   * Usernames are case sensitive. JKoller <u>is not</u> the same username as JKOLLER

RESOURCES

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

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

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

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

Next Module (1.05): https://chi-kobo.events.asor.org/portals/0105DeployingASurveyFormProject

VIEW ALL ASOR TUTORIALS FOR FREE

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