

## What is KoBo Toolbox?

KoBo Toolbox is a free open-source tool for mobile data collection, available to all. 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.

It is being continuously improved and optimised particularly for the use of humanitarian actors in emergencies and difficult field environments, in support of needs assessments, monitoring and other data collection activities.

The adaptation of KoBo Toolbox for humanitarian use is a joint initiative between OCHA, Harvard Humanitarian Initiative (HHI) and the International Rescue Committee (IRC).

## Why would I collect data like this?

**It is faster.** Data does not need to be transcribed from paper to computers before it can be analysed. Some analyses can be applied within minutes of the data being collected

**It is more accurate.** Enumeration errors are minimised because of the data validation that can occur in real time as data is collected. Transcription errors are entirely eliminated

**It is optimised for humanitarian work.** It works offline, is easy to use (requires no technical

knowledge to manage and enumerators can be trained within minutes), and can be rolled out rapidly in even the harshest or remotest situations. If all else fails, paper forms can be used as a backup and integrated with other data.

## Why would I use KoBo Toolbox?

**It is based on OpenDataKit (ODK).**

Acknowledging that many agencies are already using ODK, a de facto open source standard for mobile data collection, KoBo Toolbox is fully compatible and interchangeable with ODK but delivers more functionality such as an easy-to-use formbuilder, question libraries and integrated data management. It also integrates other open-source ODK-based developments such as formhub and Enketo.

**It is fully supported.** The implementing partners are committed to providing support for the platform, not just to help you use it and to fix any bugs, but to continue its development and regularly add new features, including ones which you suggest.

**It is free.** All humanitarian actors can create accounts on the dedicated server and use them without limitations on data or time. Organisations can also install it on their own servers or directly contribute to its further development

**It is easy.** It supports the full data collection cycle - form design, data collection and analysis - in a user friendly manner. Just follow the steps below.

## Using KoBo – a short guide

### Step 1 - Preparations before starting a data collection project using KoBo

Once you have decided to go ahead and use KoBo Toolkit for your data collection needs in the field, this is what you need to do to be ready to start:

- 1) [Sign up for a KoBo account](#) (it's completely free and you have unlimited storage and access to support from OCHA)
- 2) [Decide on which device you want to use for your data collection \(see article on KoBo support page\)](#) - also taking into consideration time of procurement process and availability of devices.
  - a) If you are using Android phones/tablets
    - i) Ensure you have sufficient amount of phones/tablets for your data collection needs
    - ii) [Install bar code scanner](#)
    - iii) [Install KoBo Collect app on all phones/tablets](#)
  - b) If you are using iPhones
    - i) Ensure you have sufficient amount of phones for your data collection needs
    - ii) [Ensure all phones have Chrome installed](#)
    - iii) [Ensure all phones have a bar code scanner app installed](#)
  - c) If you are using PCs
    - i) Ensure you have sufficient amount of PCs for your data collection needs
    - ii) [Ensure all PCs have Chrome installed](#)
    - iii) [Download the Data Analyser tool](#) (optional, but needed for improved analysis capacity)

[Now you're ready to go ahead with designing your forms.](#)

[Always ensure you have your assessment plan ready before starting to design your survey!](#)

## Step 2 - Designing a form

[Once you have finished your preparations](#), the first step of the data collection is designing your form. This is worth spending some extra time on to ensure it fulfills your needs.

- 1) [Always ensure that you have done your assessment plan](#) and know which information you need and how to use the information before starting to designing your form
- 2) If several partners are involved, try getting all partners in the same room and create the form directly in KoBo, rather than mailing around paper forms and then “translating” them into KoBo – it will give a much better results and is a faster way of [designing the form](#)
- 3) Try keeping your form as simple as possible, step by step instructions on how to use the different functionalities of the KoBo formbuilder can be found [here](#)
- 4) Use naming conventions, see link for general recommendations [here](#), although there may be country specific differences
- 5) Don't forget using the [Question Library](#) functionality, if applicable
- 6) If you need more complex functionality than what is available in the interface of the KoBo formbuilder, remember that you can always export your form and add the additional functionality in the Excel sheet (KoBo is totally synched with ODK), but do this only after you have finished the rest of your form. See here for links to [XLSForm](#), [Open Data Kit](#), how to create questions for [scoring](#), [ranking](#), [P-codes](#) and [cascading lists](#)
- 7) If you need your form in multiple languages, follow instructions [here](#)
- 8) Don't forget to preview your form before saving and exiting to check for any spelling errors, errors in added logic, etc.

[Once the form is created you are ready to deploy it and start collecting the data.](#)

## Step 3 - Collecting the data

[Once your form has been designed](#), you are ready to start collecting the data.

- 1) Train the enumerators, so they fully understand questions and methodology
- 2) [Deploy the form you want to use for your data collection](#)
- 3) If enumerators are going offline – no problem, the forms will be uploaded to the system once they are connected again
  - a) [If you are using Android phones/tablets](#)
    - i) Ensure all phones/tablets can access the survey by setting up the correct URL ([Server URL set up](#))
    - ii) Ensure that all phones/tablets have the relevant form(s) downloaded from your account ([Download forms from your account](#))
    - iii) Clean the phones/tablets so they can only access relevant surveys and settings by hiding buttons and options ([Hiding buttons and options within KoBoCollect](#))
    - iv) Ensure all phones/tablets are fully charged - note that tablets usually take a long time to charge
  - b) If you are using smartphones
    - i) [Upload the survey to all phones \(preferably by bar code scanner\)](#)
    - ii) Ensure all phones can access the survey
    - iii) Ensure all phones are fully charged
  - c) If you are using PCs
    - i) [Ensure all PCs can access the survey](#) (even if internet is available, in case it stops working)
    - ii) Ensure all PCs are fully charged (in case of power failure)
    - iii) Always print plenty of paper copies for backup (the preview functionality gives the best layout)!
    - iv) When the data collection is done, it's time for the last step - [analysing the data](#).

## Step 4 - Analysing the data

[When your data is collected](#), it's time for the analysis step.

- 1) Ensure all the forms have been submitted (check if any devices are still offline and have not completed their submissions)
- 2) If you are without any network connection, transfer the information from mobile devices to PC by cable
- 3) Use the KoBo analyzing possibilities
- 4) Export data to [Data Analyser](#) and/or [Excel or other formats](#) and continue the analysis

Always make sure you have a data analyser involved when analysing the data to ensure quality of analysis - automated analysis is never a substitute!

## Get more detailed information

Consult our [FAQs](#) for common questions on all sorts of topics and ask for [technical support](#) – to report bugs, provide feedback and even to request new feature – and for implementation support questions.

<http://support.kobotoolbox.org/>