1. How to: build a form

KoBoToolbox guidelines

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Create an account

Before you can start, you need to log in. If you or your organization don't have an account yet, you need to create an account.

❯ Always check if your organization already has a KoBo account before creating a new one!

1. Go to: https://kobo.humanitarianresponse.info/accounts/login
2. Click: **create an account**
3. Fill in the details
4. Click: **create account**

Building your form is possible in two ways: (1) create your own form or (2) edit a shared form (a form that is shared with you by other users of kobo.humanitarianresponse.info).

Create your own form

1. Click: **New**
2. Choose: **Build from scratch**
3. **Enter the title** of your project under Project Name. It is not needed to fill in more project details.
4. Click: **Create project**
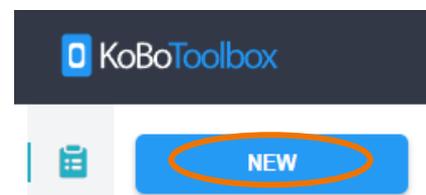
Edit a shared form

1. Make sure the form is shared with you. The other party needs to know your username in order to share it.
2. Click: **Projects**
3. Go to: **Draft**
4. Find the form you want to edit and click on it.
5. Click on the **pencil icon** to edit the form.
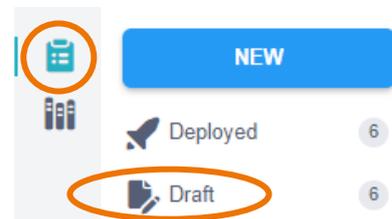
It is possible that the pencil icon is not activated and you get the message that *Editing capabilities are not granted.* In that case follow the next steps:

1. Ask the person who shared the form with you to grant you permission to edit
2. Once they granted you permission, the pencil icon will get activated and you can click on it.

If they don't want you to edit the form because they want to keep it as the original:

1. Click on the '**More Actions**' icon (3 dots)
2. Select: **Clone this project**
3. Enter the name of the project and click: **OK**
4. You can now click on the pencil icon to edit your form.
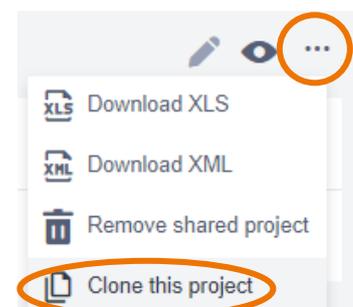
❯ If you use a form that is created and managed by someone else, keep in mind that the other party can also view your submissions from data collection. If you don't want that: choose for cloning the project. In that case you will create your own project.

Creating questions

If you have followed the previous steps you are now in the form builder. Which looks like this:
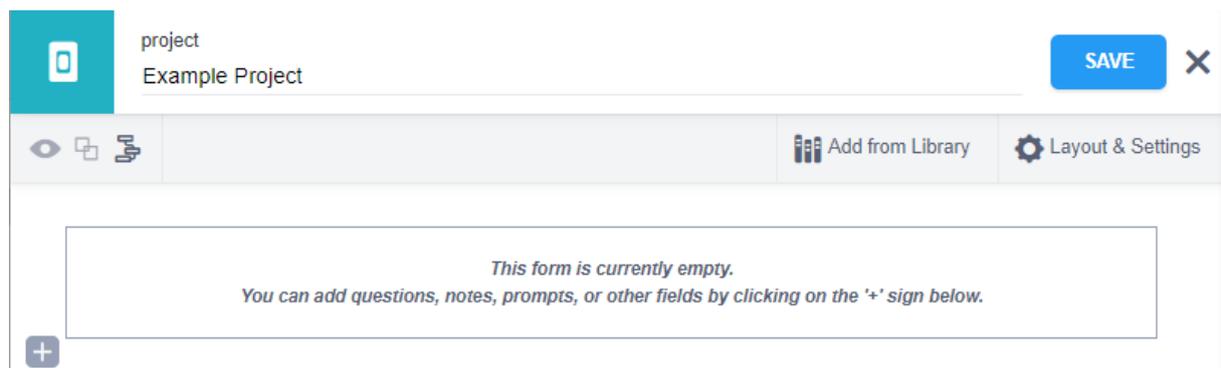
Important first steps

› For the sake of validity, go to: **Layout & Settings** and make sure that **start** and **end time** are selected. You can now see how long it took the enumerator to fill in the form.

› Regularly click: **save**! So you won't risk losing your work.

Creating notes and questions

1. Click: **+**
2. Type your question.
3. Click: **+ add question**

You will see that there are different kind of questions, also shown in the picture below.
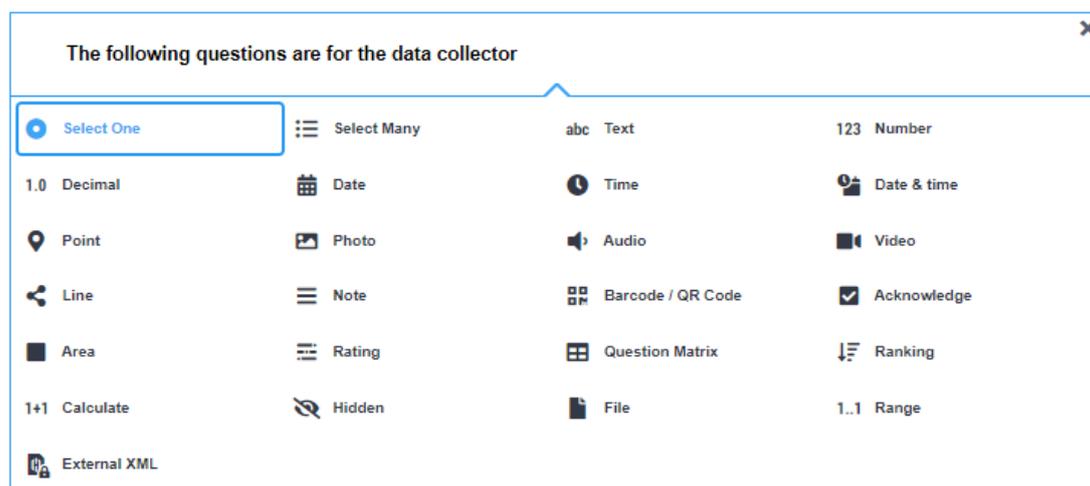
The options: Select one, Select many, Text, Number, Decimal, Date, Note, and Rating are the ones that you will probably use the most. Pick the option that suits your question most. In this example, we will use the Note option as we want to give information to the data collector instead of asking for answers from the respondent.

Mandatory response

When all respondents need to answer a specific question, follow the next steps:

1. Click: **settings**
2. Go to: **Question Options**
3. Choose: **Yes** for Mandatory response.

> ❯ If you use the Note option, don't ask for a mandatory response! Since respondents are not able to answer a note, they won't be able to complete the survey when a response is mandatory.

Grouping questions

Once you have drafted your first questions, you can create a group. This will not only help to create a nice overview and see which questions belong to the same topic, it also allows to use group settings. For example, to add *skip logic* for the grouped questions. More information about *skip logic* can be found on the next page.

1. Select the question or note that you have drafted

It highlights to blue. At the same time the icon for Create group with selected questions gets activated.

2. Click: **Create group with selected questions**

You should now be able to see the question has been grouped (despite the fact that there is only one question at the moment).

3. Change the name of the group
4. Add other questions by dragging them into the group or by clicking: **+**

The same way it is possible to group questions inside a group if you want to.

Adding validation criteria

In order to avoid accidental or invalid answers, especially for numeric questions, you can add validation criteria to your questions. To add validation criteria:

1. Click: **Settings**
2. Go to: **Validation Criteria**
3. Click: **+ ADD A CONDITION**

It is possible to write an **Error Message** (optional). This is the message your data collector sees when they enter an invalid response.

Adding skip logic

By default, all questions are always visible. *Skip logic* controls which question should be displayed only if a certain condition (or conditions) is fulfilled. Conditions are always applied to the question or group that should be hidden or visible, depending on the situation.

Follow the next steps to add *skip logic*:

1. Click: **Settings**
2. Go to: **Skip logic**
3. Click: **+ ADD A CONDITION**
4. Select the right question and condition.