



The field data collection toolkit for challenging environments

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KoboCollect

Is there any child under 10 years old living here?

Yes

No

Committed to improving humanitarian and development data collection globally

■ Topics

PART I - NEW FEATURES

- **Dynamic Data Attachments / Basic Case Management**
- **Public Collections**
- **Bulk Data Editing**
- **Template Locking**
- **Integrated Audio Recording**
- **Two-factor Authentication**

PART II - DESIGN & UPCOMING

- **Formbuilder Improvements**
- **Auto-Report Enhancements**
- **Usage Study**
- **Team / Organization Level Views**
- **Transcription & Translation Features**
- **Qualitative Data Analysis**
- **User Support & Training Options**

Part I

New features recently rolled out

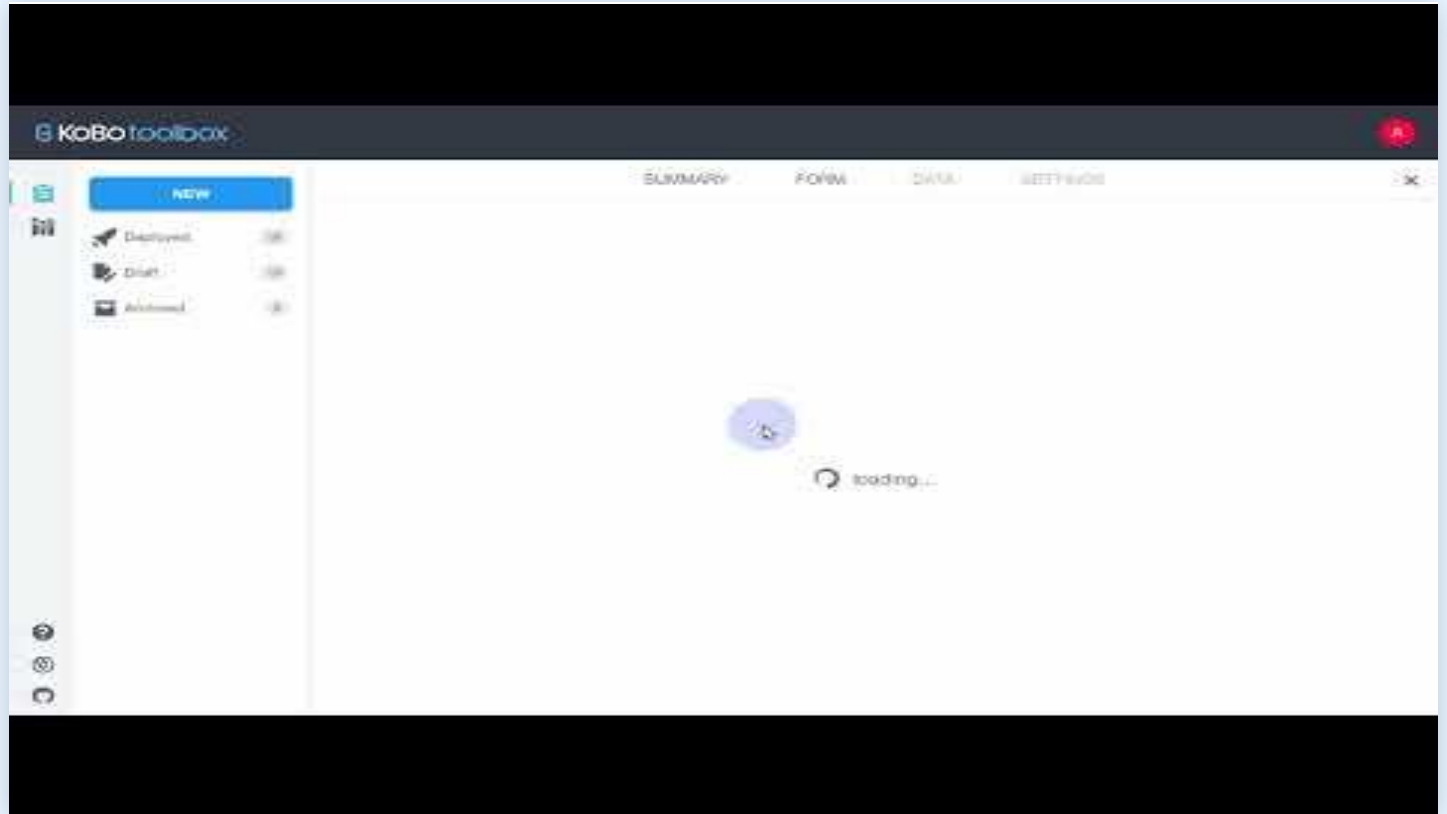
Dynamic data attachments / basic case management

Dynamic data attachments allows you to implement basic case management by pulling data from one project into another

The screenshot displays a form builder interface for a form titled "Item distribution form". A blue callout box at the top states: "Calculate" questions using a common field to pull data from parent form to child form. The main area shows a list of four dynamic data attachments, each with a diamond icon and a formula: `instanceOf("projectData@id = current().id_id")District`, `instanceOf("projectData@id = current().id_id")TA`, `instanceOf("projectData@id = current().id_id")Sex`, and `instanceOf("projectData@id = current().id_id")Age`. Below these is a "Note" question with the text: `Beneficiary is ${it.Beneficiary_Name}, ${it.sex}, age ${it_age} from TA ${it_TA} in ${it_district} district`. A blue callout box at the bottom right points to this note question, stating: "Note" question to display the pulled data. A dark grey box at the bottom left is labeled "Child form (Round 2)". The interface includes a "SAVE" button in the top right, an "Add from Library" button, and a "Layout & Settings" menu.

Public collections

Public Collections are user contributed question templates that everyone can use to quickly create forms



Bulk data editing

Now you can edit multiple form submissions in the data table using the new **Bulk Data Editing** feature

The screenshot displays the KoBoToolbox interface for a 'Child Nutrition' form. The interface is divided into several sections:

- Header:** KoBo toolbox logo, 'Child Nutrition' title, and '10 submissions' with a red notification badge.
- Navigation:** A sidebar on the left with a 'NEW' button and options for 'Deployed' (18), 'Draft' (18), and 'Archived' (0). A central menu includes 'Table', 'Reports', 'Gallery', 'Downloads', and 'Map'.
- Table View:** The 'DATA' tab is active, showing a table with columns: 'Validation', 'start', 'end', 'District', and 'Household ...'. The table displays 10 rows of data, including fields like 'Banda', 'Chirwa', 'Miliyadi', 'Matthias', 'Swira', 'Smart', 'Zoya', 'Samu', and 'Kwiyula'. A 'hide fields' option is visible at the top of the table.
- Footer:** A pagination bar at the bottom shows 'Page 1 of 1' and '30 rows'.

Part I

Q&A

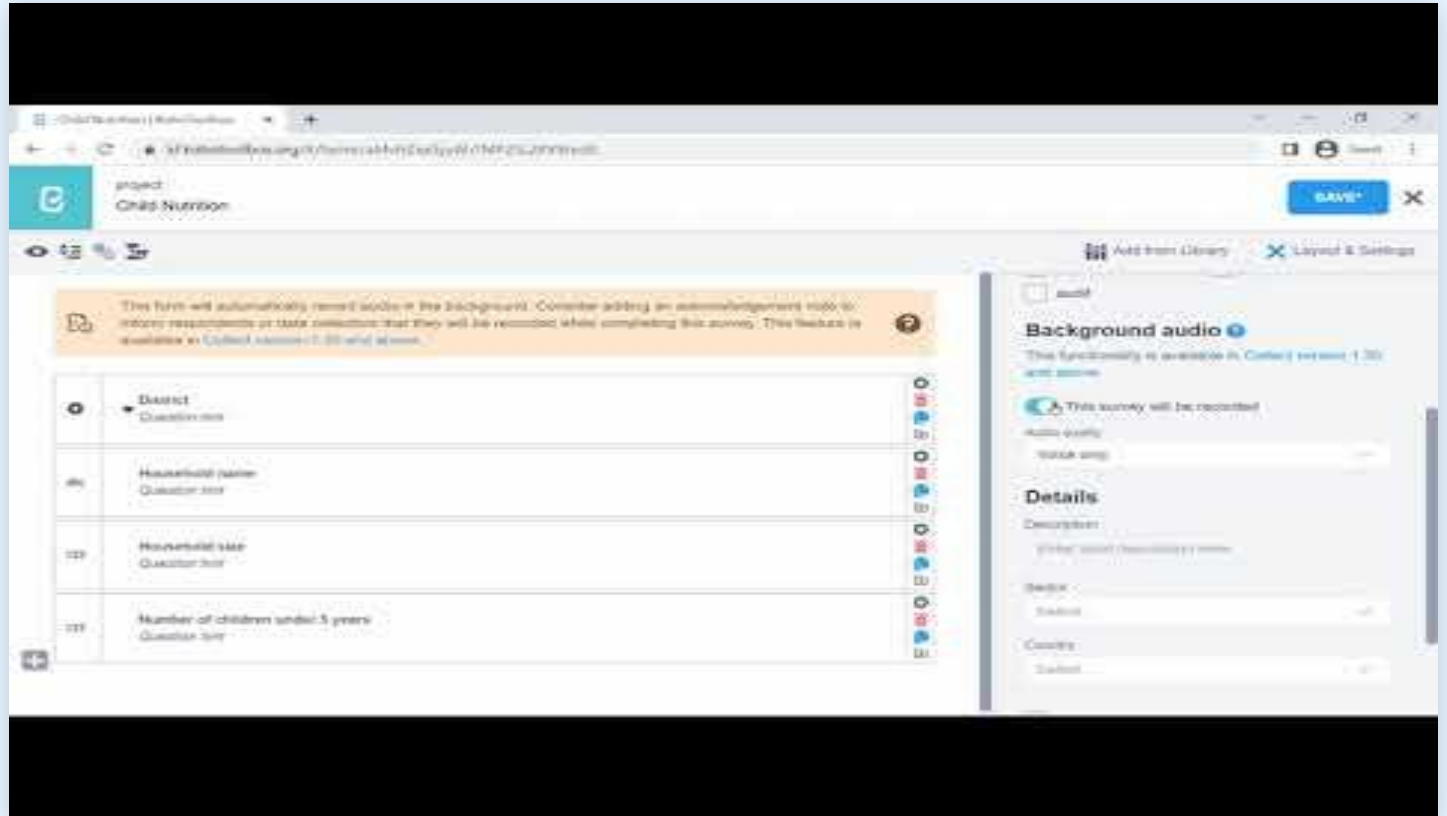
■ Template locking

The new **Template Locking** feature allows you to share form templates with restrictions of what can be edited and what shouldn't be



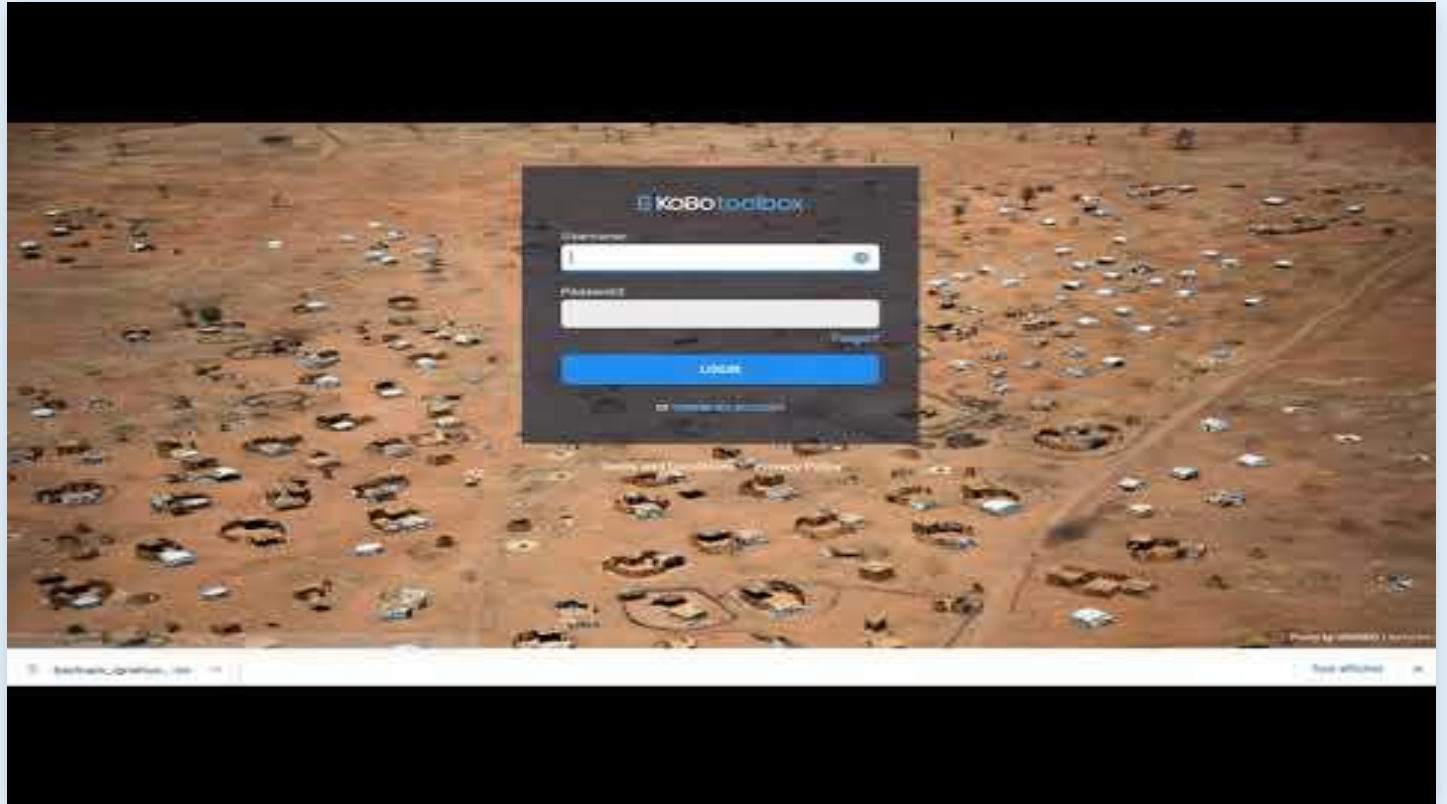
■ Integrated audio recording

Now you can record audio within KoboCollect - no need for a separate audio recording app



■ Two-factor authentication (2FA)

Two-Factor authentication provides an additional layer of security to your data



Part II

Q&A

Part II

Design research & upcoming features

Formbuilder improvements

Research and design of the future of the Formbuilder

Addressing the most requested needs from the community

Emphasis on accessibility, ease of use, and intuitiveness

Preliminary technical work and updates to the code.

The screenshot displays the Formbuilder interface for a project named "Test project". The interface includes a top navigation bar with a "SAVE" button and a close icon. Below the navigation bar is a toolbar with icons for navigation and editing. The main area shows a list of form questions:

- Question 1:** "Name" with a question hint "Question hint". It has a unique ID "abc" and a settings icon.
- Question 2:** "Gender" with a question hint "Question hint". It has a unique ID "123" and a settings icon. The question is expanded to show three radio button options: "Female", "Male", and "Other". Each option has an associated "XML value" field: "female", "male", and "other". There is also an "AUTOMATIC" option for the XML value. A button below the options says "+ Click to add another response...".
- Question 3:** "Age" with a question hint "Use only numbers". It has a unique ID "123" and a settings icon.
- Question 4:** "Tell us how was your experience in the last week" with a question hint "Question hint". It has a unique ID "123" and a settings icon.

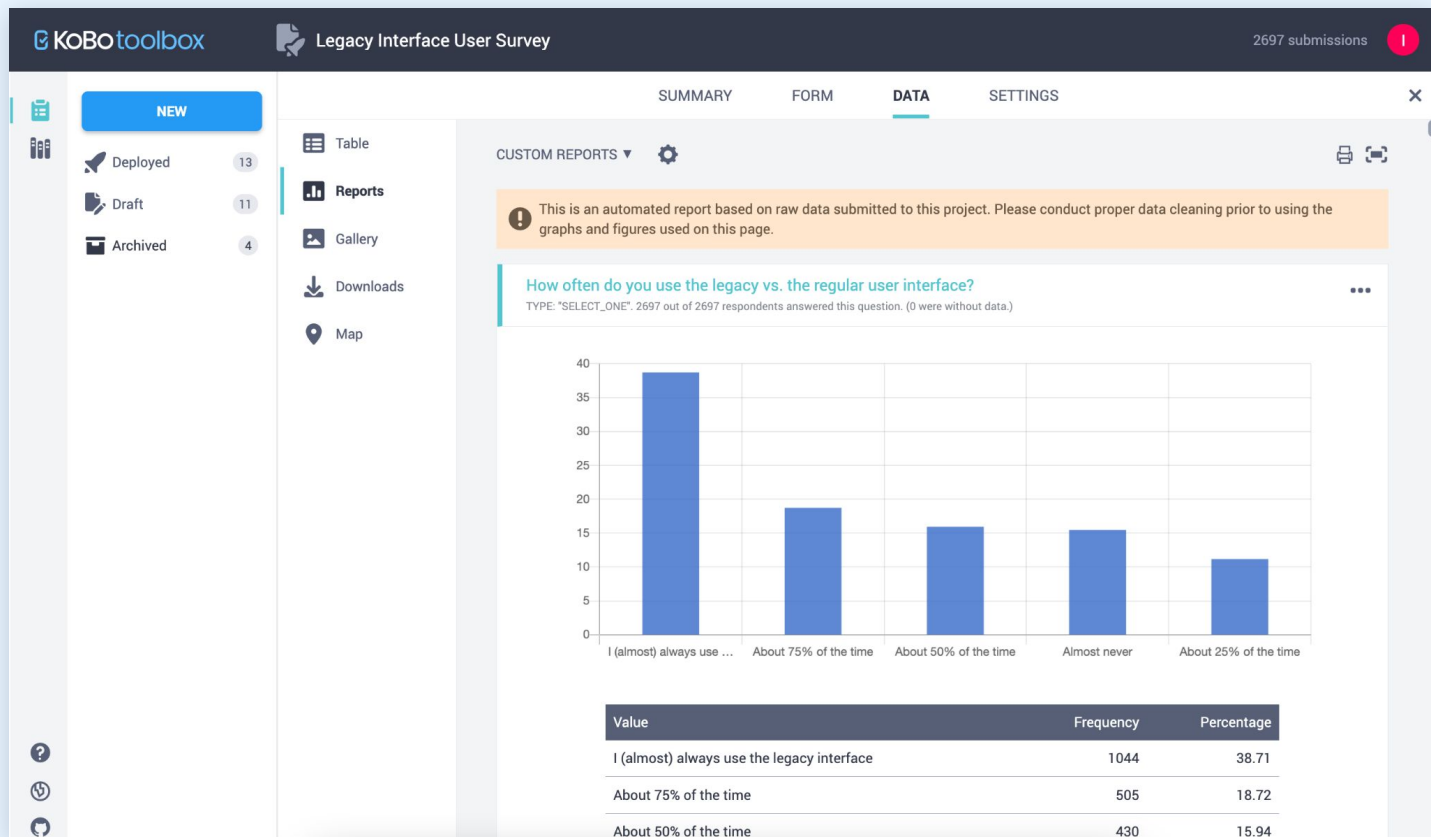
A plus sign icon is visible at the bottom left of the question list, indicating the ability to add new questions.

Auto report enhancements

Preliminary research to improve reports

User research and design on next phase

Emphasis on easier exports and customization, exploring new ways of creating graphs



Usage study in partnership with UNHCR

Better understand the needs of larger organizations, from the global to local level.

Identify most used features and greatest challenges

Obtain feedback prioritize needs and develop a development roadmap.

- Case management for historical data - Follow up surveys repeating the same form over periods of time and linking previously collected data
- More customizable downloads (i.e. labels and xml values)
- Improvement of the Reports section - easier access, more options and better UI
- Ability to customize forms using CSS and JS

For more detailed information, a PowerBI visual summary of the results can be found [here](#).

Key insights

Recurrent issues and challenges

User management and permissions

Management of users in a project continues to present multiple challenges. The system of permissions is insufficient to effectively manage large teams or assign tasks. Most common issues are not being able to see information about users beyond username, not being able to change ownership of a project, or having to add users one by one.

Projects monitoring

Particularly at the regional level, this is a recurring issue. There is no system to keep track of all the projects in the region, or have access to high level information about these projects.

Tracking changes and version history

Large teams often make changes to the form design, or edit the data collected afterwards. In both cases it is difficult to know when these changes happened and who made them. Knowing who made what changes and when can allow large teams to collaborate more efficiently.

Manage multiple related projects (topic related or historical data)

Often projects (forms) are repeated periodically and data needs to be contrasted with data from previous interviews. In other contexts, surveys simply overlap or complement each other and access to both before, during or after the interview is necessary. This is still complicated to manage properly in KoBoToolbox. Other regional managers also expressed the difficulty of managing the large number of projects they have to oversee. Having a way to group related projects or filter the list of projects more effectively would save much time.

Uploading lists of respondents

Often projects have a predetermined list of responders to interview, with their contact information and relevant data. At the moment, there is no system to upload or use this data in KoBoToolbox, it needs to be managed externally.

project owners to have the option deactivated, or having to create separate accounts, which increases challenges and security vulnerabilities.

High priority

Project / team management

Expose project meta details to regional super-admins

Install Django report builder to expose project meta details for superadmins

Creation and management of data collector accounts

Create easier ways to create accounts (and manage those accounts) for enumerators and supervisors of those enumerators.

Project dependent temporary users

Allowing the creation of profiles directly tied to a project. These profiles would be deleted once the project is archived.

Security improvements

Single Sign On (SSO) / Integration with Active Directory

Some organizations running KoBoToolbox servers need their staff to log in with Active Directory. Interested organizations include UNHCR, World Bank, MSF, among others.

Medium priority

Require 2FA for all users of a given server / team

Allow admins of a given organization to enforce the use of 2FA for all users that are part of that organization.

Enforcing password complexity for users

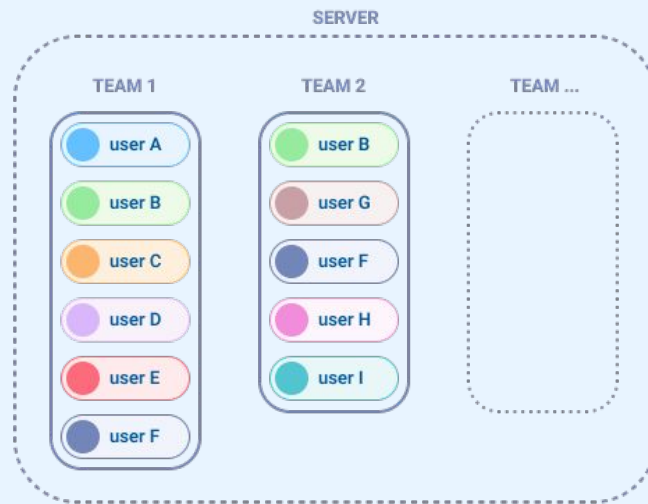
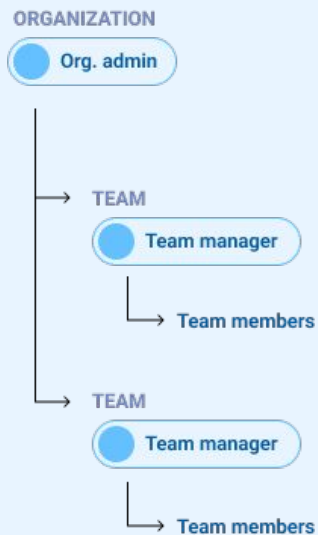
It would be good if the Create an account

Team/organization level views

Addresses organizational needs for transparency and team hierarchies

Higher data security across teams

Ensures the correct forms, sharing settings, and metadata are used across a team / organization



■ Transcription & translation features

Collect more open-ended responses

Deeper understanding of affected people

Transcribe automatically or manually

Translate transcripts, notes, text responses

The screenshot displays a survey question: "How was your experience working with us in the last year?". The interface includes a "Done" button in the top right corner and a progress indicator showing "Item 99999 of 99999". Below the question, there are two tabs: "TRANSCRIPT" and "TRANSLATIONS". The "TRANSCRIPT" tab is active, showing a transcription of the response in Italian. The transcription is labeled "Italian, Italy" and "Machine generated" with a timestamp of "2 mins ago". The text of the transcription is: "È stato un anno impegnativo, ma nel complesso mi è piaciuta la sfida. La situazione nel paese è molto difficile e tutti qui sentono lo stress e il disagio psicologico. Ma ce la caviamo, fondamentalmente perché ci sosteniamo tutti a vicenda e ci assicuriamo che ci sia una buona atmosfera. Il momento peggiore è stato a marzo, quando stava accadendo il peggio della crisi. Ero appena arrivato e non sapevo cosa fare o come gestirlo, ma Olivier mi ha davvero aiutato a superarlo. Mi sento fortunato ad averlo qui con noi. L'unica cosa che cambierei è l'ufficio. Non abbiamo abbastanza scorte, spazio o internet per il lavoro che dobbiamo fare, abbiamo bisogno di una messa a punto migliore." To the right of the transcription, there are icons for editing and deleting. Below the transcription, there is a video player showing a file named "name_of_the_file_0001.mp3" with a duration of 1:21. The video player has a play button and a progress bar. To the right of the video player, there is a "Submission" section with a "choose fields" link. The submission details include: Name: Alessandro de Simone; Upload a picture of your working space; File uploaded; Select your duty station: Cameroon; What languages can you speak fluently?: Italian, English, French.

Qualitative data analysis

Quickly turn qualitative data into actionable insights

Manual tagging at first

Automated summaries

The screenshot displays a software interface for qualitative data analysis. At the top, a search bar contains the text "How was your experience working with us in the last year?". To the right of the search bar, it shows "Item 99999 of 99999" and a "Done" button. Below the search bar, there are three tabs: "TRANSCRIPT", "TRANSLATIONS", and "ANALYSIS", with "ANALYSIS" being the active tab. On the right side of the interface, there are icons for "Side menu" and "Settings".

The main content area is divided into two columns. The left column contains a "Brief summary of the audio" section with a blue "+ Add question" button and a gear icon. Below this, there is a text box containing the summary: "Refugee who travelled from Afghanistan by foot. Extremely difficult journey. Husband died along the way. Multiple cases of abuse, particularly near national borders. Dire need of water and food." The right column contains a "Submission" section with a "choose fields" link. It shows the start and end times of the audio: "Start May 23, 2022 11:51:52" and "End May 23, 2022 12:43:07". Below this, there is a link to upload a picture of the working space: "Upload a picture of your working space kaDoaw32jFOKAan.jpg" and a field for "Select your duty station" with the value "Cameroon".

The right column also features a media player for the audio file "name_of_the_file_0001.mp3" with a "show more" link and a progress bar showing 0:00 to 1:21.

Data security

- ISO 27001 policies and audits
- Data Processing Agreements for GDPR compliance
- Industry best practices for encryption in transit and at rest
- Dedicated data security officer
- Transparent documentation of all policies and data security measures on the website at https://support.kobotoolbox.org/is_my_data_safe.html

KoboToolbox data security measures: Keeping your data safe

Last updated: 6 Apr 2022

We take data protection very seriously. Data security means protecting our users' data from any threats that may exist. This article summarizes some of our administrative, physical, organizational, and technical measures for enforcing data security on the KoboToolbox servers maintained by Kobo, Inc., the [nonprofit organization behind KoboToolbox](#).

We are fully compliant with the European Union's General Data Protection Regulation (GDPR). If you are located in the European Union, [you can sign a data processing agreement \(DPA\) here](#).

Confidentiality

Physical Access Control

- Physical access control measures, amongst others, are implemented by Amazon Web Services (AWS), which is used to host our KoboToolbox servers. These measures include, for example, video surveillance and physical security of server and network facilities, maintaining key card access control, limiting access to only authorized personnel. For a full list of details about AWS technical and organizational measures for physical access control, [see this article](#) on data center controls provided by AWS.

Electronic Access Control

- All KoboToolbox accounts are password-protected. Users are provided visual feedback about the complexity of their password, which encourages them to select a stronger password when applicable. Only encrypted password hashes are stored on the KoboToolbox server, utilizing the default open-source framework provided by Django, which uses the [PBKDF2](#) algorithm with a SHA256 hash. Plain text passwords are never saved on the server.
- All database content is encrypted at rest (disk-level encryption).
- Data sent to the server is encrypted in transit using SHA-256 with RSA encryption.
- Users can [choose to also enable encryption of their project data \(data-level encryption\)](#) which renders it inaccessible at all stages of data processing and requires a private key to decrypt it locally.

Internal Access Control

- Only authorized system administrators can access the KoboToolbox Server. They may only do so for the express purpose of updating installed software or maintaining the server infrastructure.

■ User support and training options

Introducing professional support options

Dedicated user support staff

Professional training for beginners, intermediate, and advanced users

	Always free	Advanced	Pro	Enterprise
Support				
Vibrant community forum	✓	✓	✓	✓
Self-serve learning base with tutorials, documentation, and training videos	✓	✓	✓	✓
Online training course and certificate		✓	✓	✓
Standard support (troubleshooting)		✓	✓	✓
Advanced support (forms, integrations, etc.)			✓	✓
Priority response timing			✓	✓
Access to immediate support through chat				✓
Professional training				
Consultations with KoboToolbox experts			✓	✓
Custom training sessions		On demand	On demand	✓

Part III

Q&A

Get in touch:

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