KoboToolbox

The field data collection toolkit for challenging environments

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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
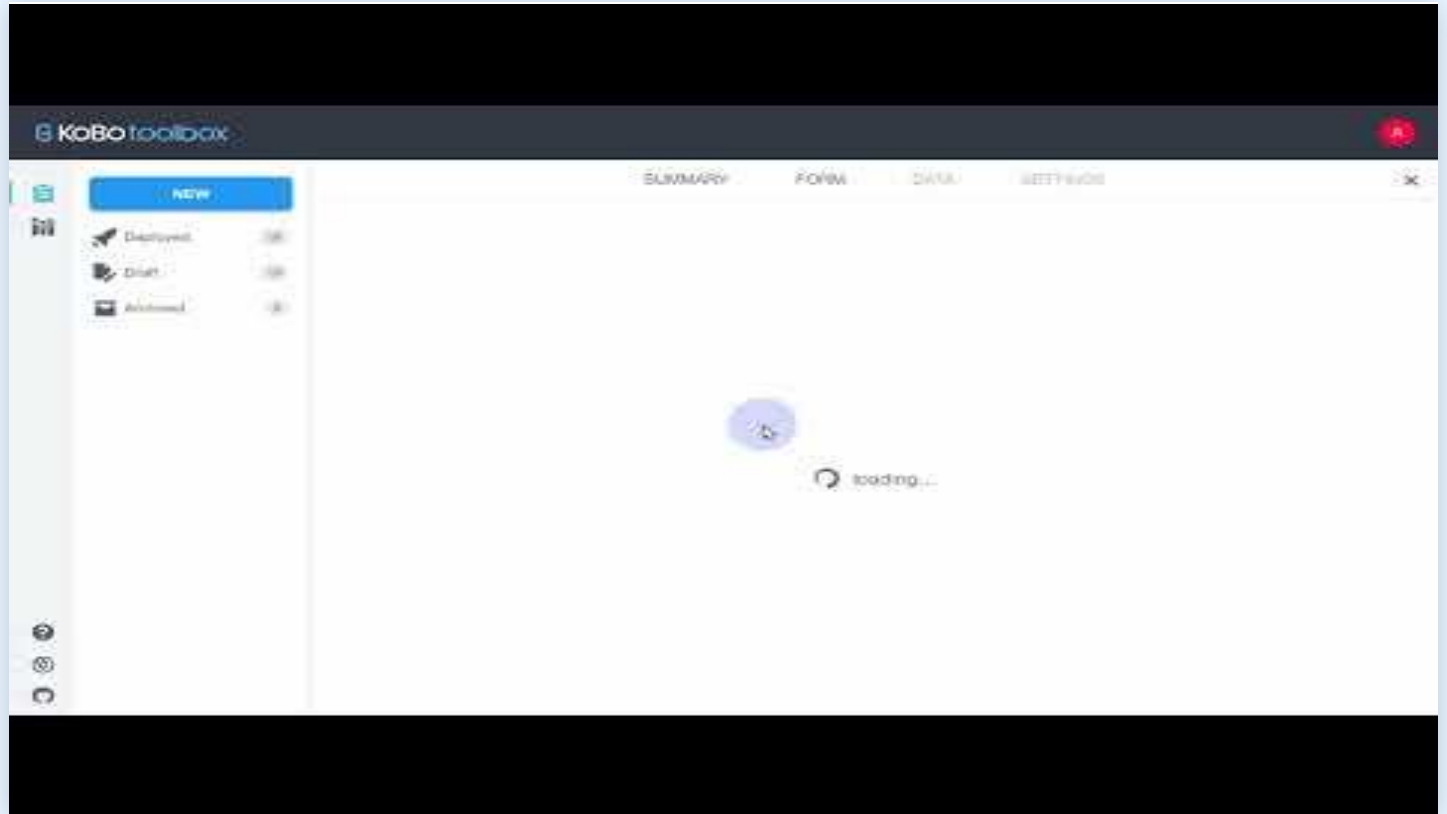**New features recently rolled out**

Dynamic data attachments / basic case management

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

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

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
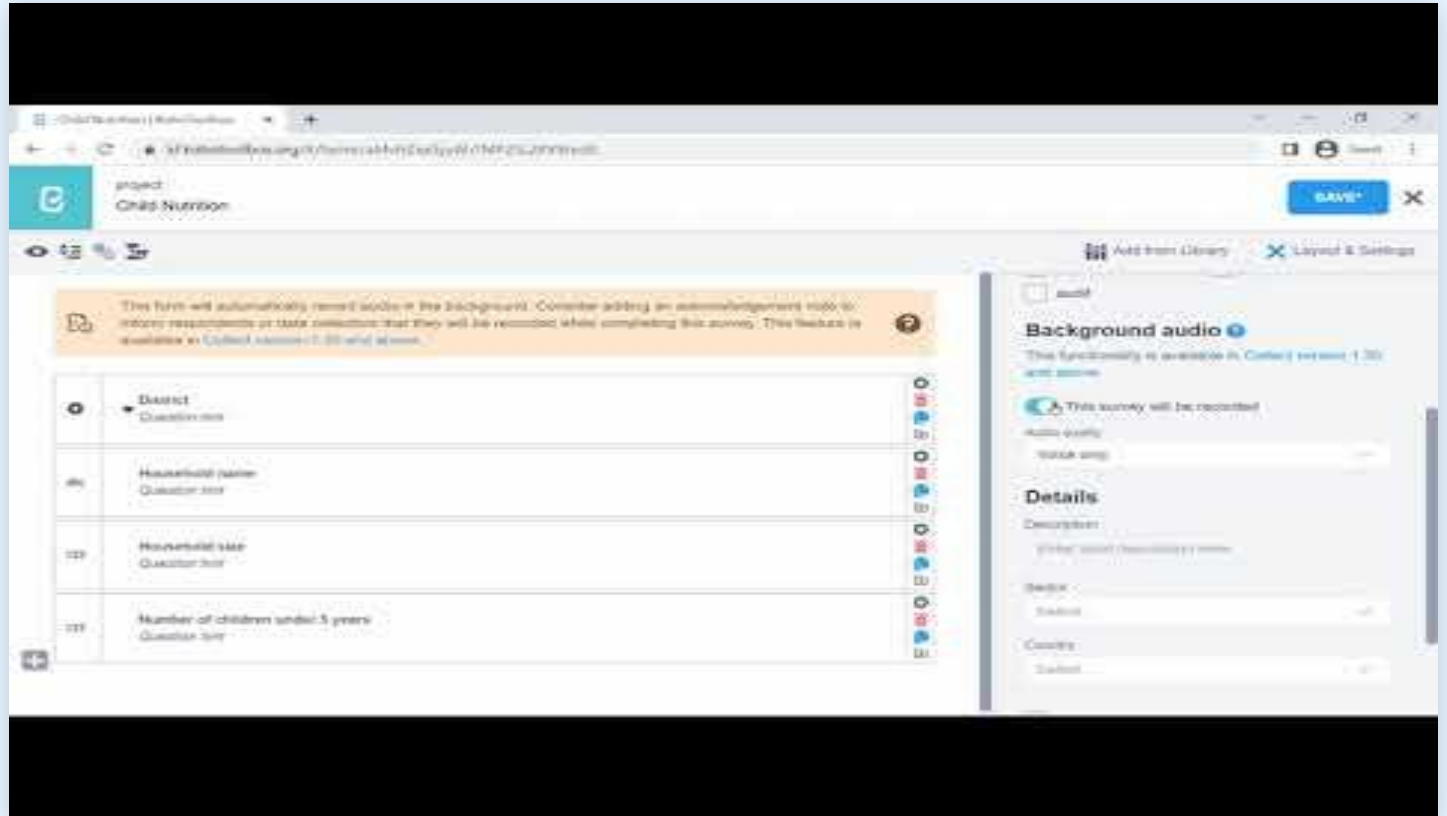
Two-factor authentication (2FA)

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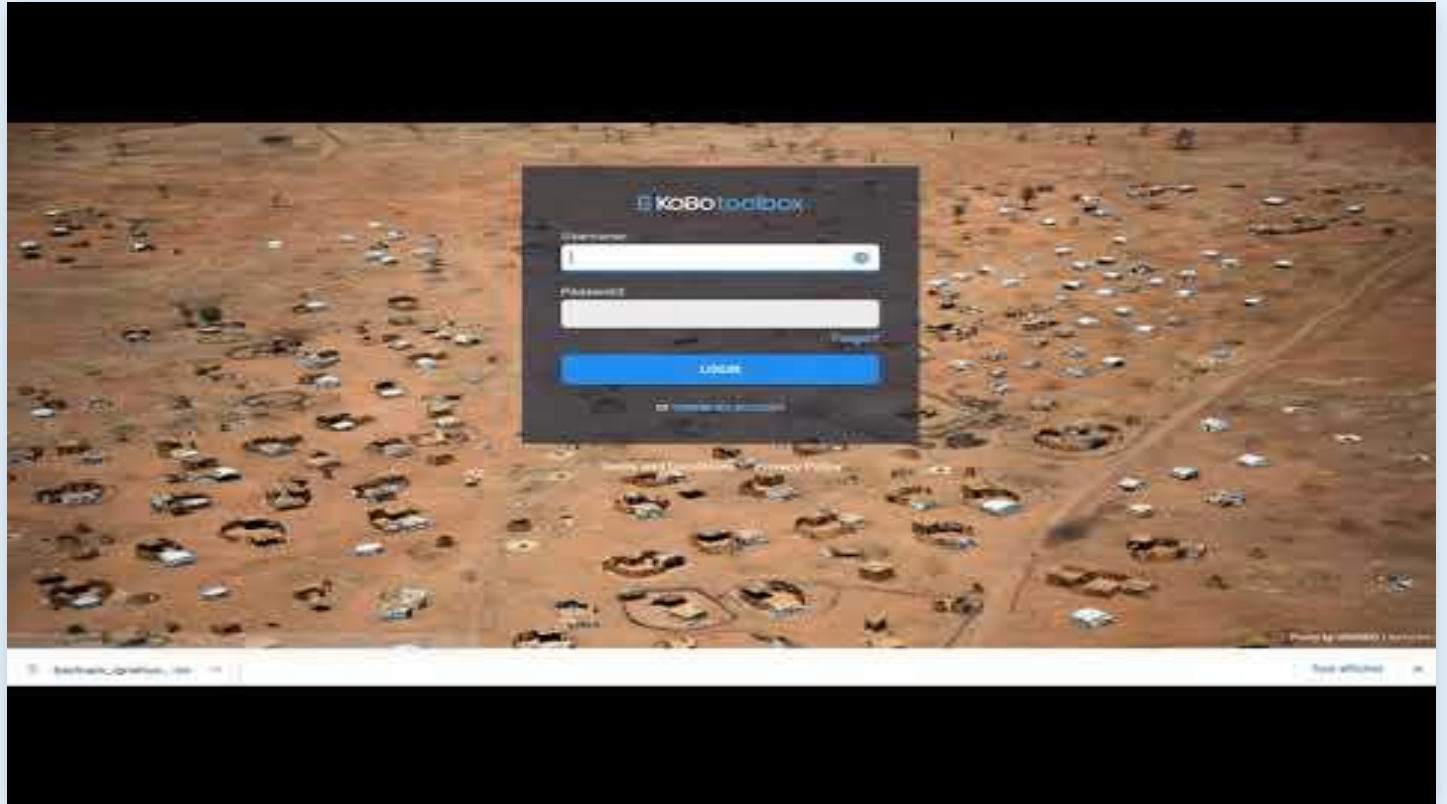
Part II

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.

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
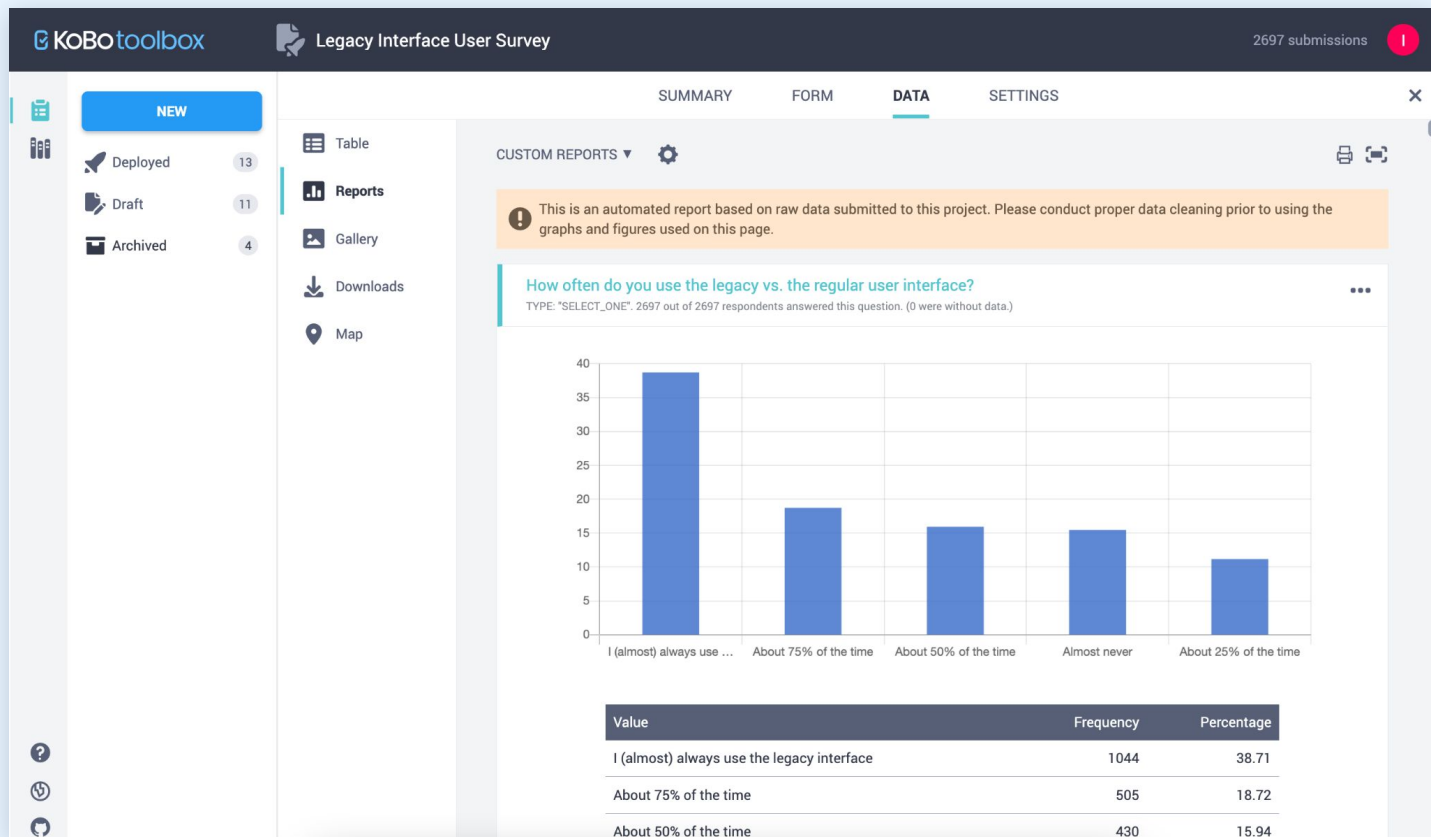
Usage study in partnership with UNHCR

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.
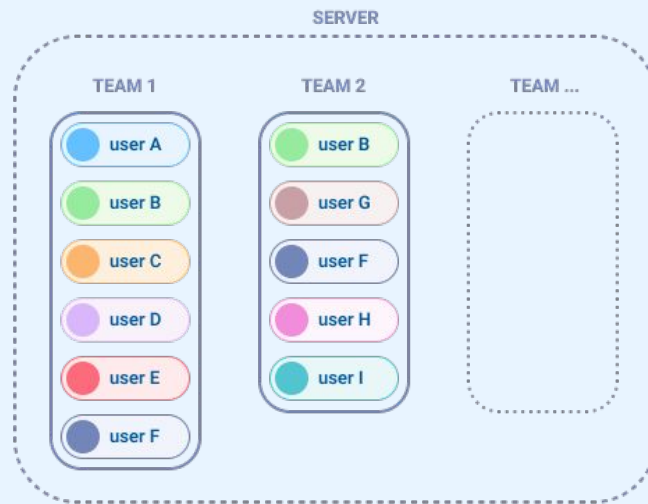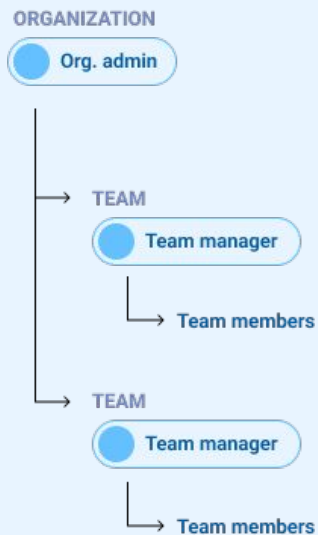
Enforcing password complexity for users

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

ORGANIZATION

Org. admin

TEAM

Team manager

Team members

TEAM

Team manager

Team members

SERVER

TEAM 1

user A
user B
user C
user D
user E
user F

TEAM 2

user B
user G
user F
user H
user I

TEAM ...

Transcription & translation features

Collect more open-ended responses

Deeper understanding of affected people

Transcribe automatically or manually

Translate transcripts, notes, text responses

How was your experience working with us in the last year?

Item **99999** of 99999

Done

TRANSCRIPT   TRANSLATIONS

Side menu   Settings

Italian, Italy   ● Machine generated   2 mins ago

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.

name_of_the_file_0001.mp3   show more

0:00   1:21

Submission   choose fields

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

How was your experience working with us in the last year?

Done

TRANSCRIPT   TRANSLATIONS   **ANALYSIS**

Side menu   Settings

+ Add question

Brief summary of the audio

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.

Key topics mentioned

Refugee ×   Hunger ×   Victim of abuse ×   Afghanistan ×

name_of_the_file_0001.mp3   show more ▾

0:00   1:21

Submission   choose fields

Start
May 23, 2022 11:51:52

End
May 23, 2022 12:43:07

Upload a picture of your working space
kaDoaw32jFOKAan.jpg

Select your duty station
Cameroon

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

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:

info@kobotoolbox.org