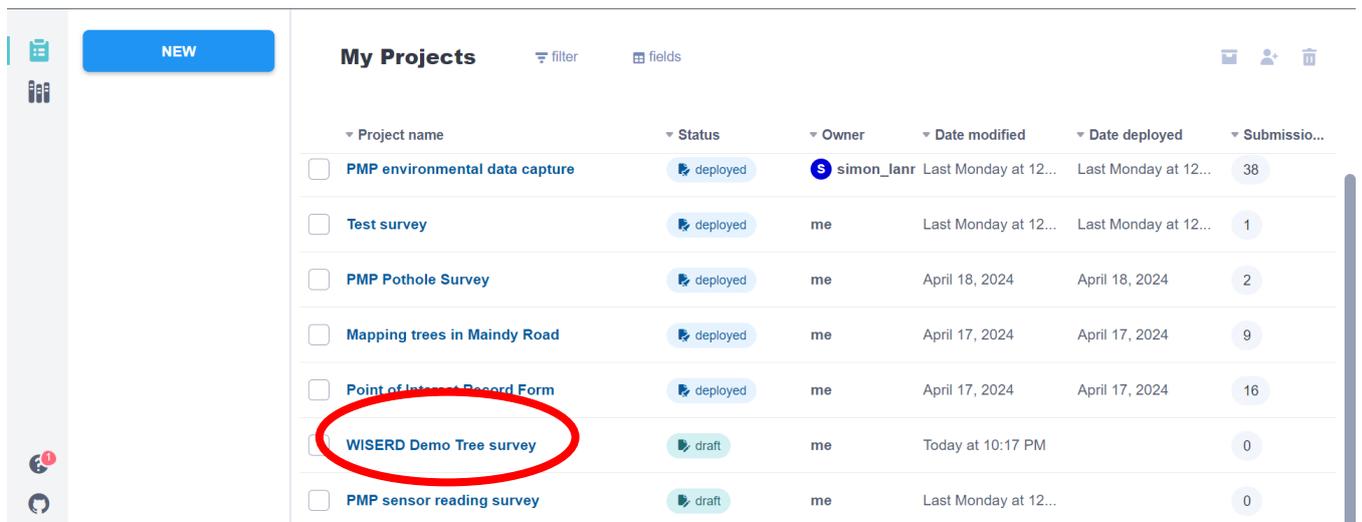


KoboToolbox

This tutorial will show you how to manage your survey, and then deploy and share your survey with others

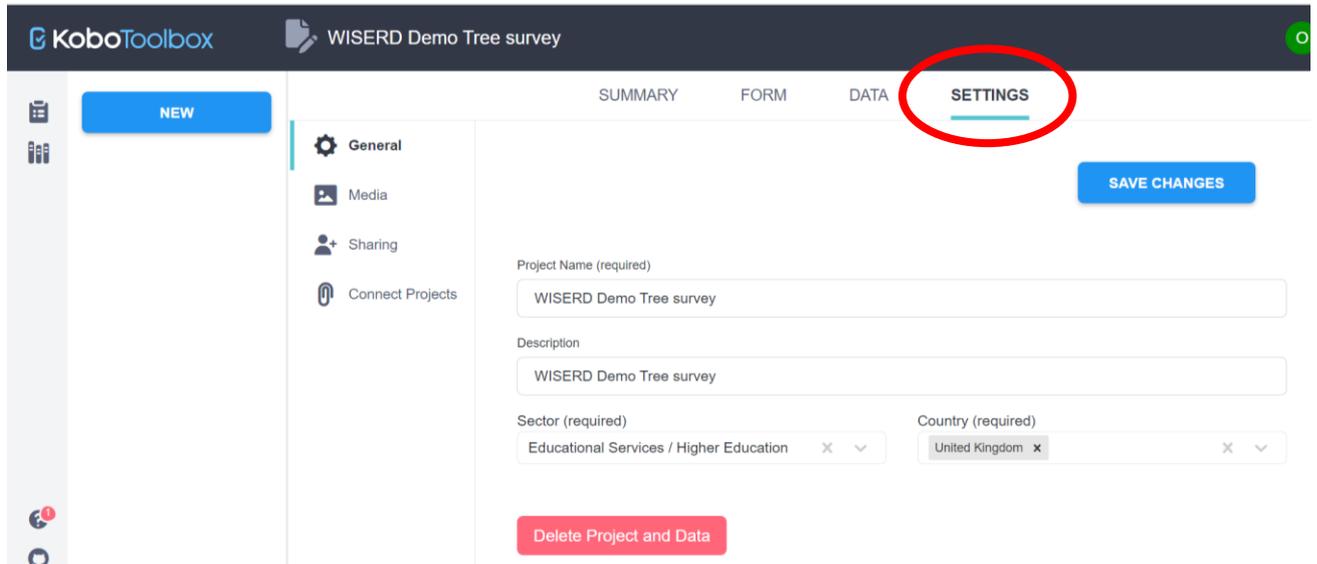
Managing your survey

The dashboard displays all your current surveys. Click on a blue title to access a survey eg [WISERD Demo Tree survey](#) and it will bring you to the project survey information page.



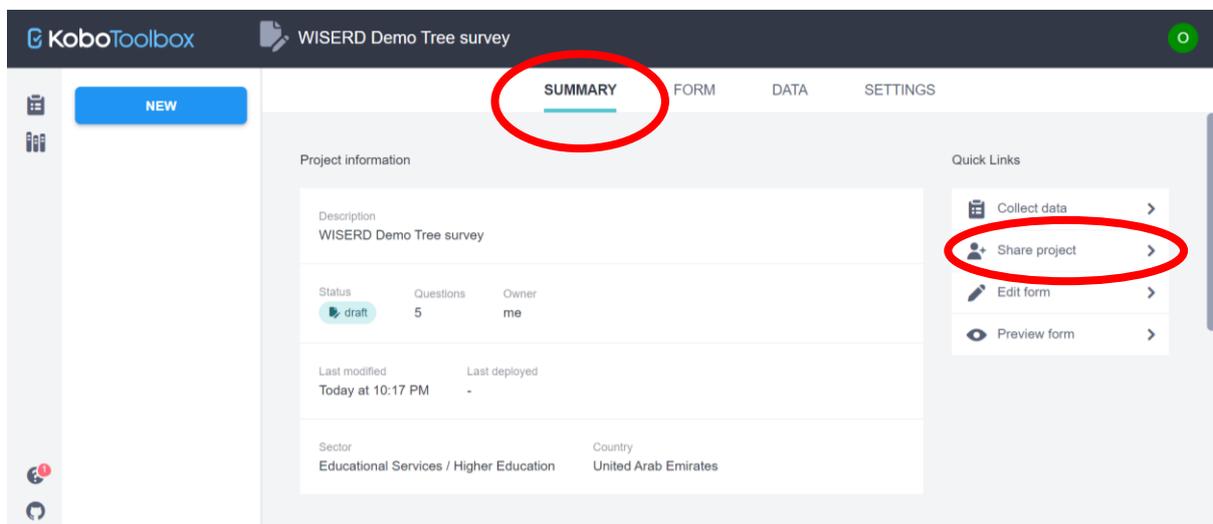
The screenshot shows the 'My Projects' dashboard in KoboToolbox. The dashboard has a sidebar on the left with a 'NEW' button and a main table of projects. The table has columns for Project name, Status, Owner, Date modified, Date deployed, and Submission count. The 'WISERD Demo Tree survey' is circled in red.

Project name	Status	Owner	Date modified	Date deployed	Submission...
<input type="checkbox"/> PMP environmental data capture	deployed	simon_lanr	Last Monday at 12...	Last Monday at 12...	38
<input type="checkbox"/> Test survey	deployed	me	Last Monday at 12...	Last Monday at 12...	1
<input type="checkbox"/> PMP Pothole Survey	deployed	me	April 18, 2024	April 18, 2024	2
<input type="checkbox"/> Mapping trees in Maindy Road	deployed	me	April 17, 2024	April 17, 2024	9
<input type="checkbox"/> Point of Interest Record Form	deployed	me	April 17, 2024	April 17, 2024	16
<input type="checkbox"/> WISERD Demo Tree survey	draft	me	Today at 10:17 PM		0
<input type="checkbox"/> PMP sensor reading survey	draft	me	Last Monday at 12...		0



SETTINGS allows you to edit the survey (project) name, description, sector and country as well as deleting the survey.

The DATA and FORM pages are currently empty as we have not deployed the form or collected any data.

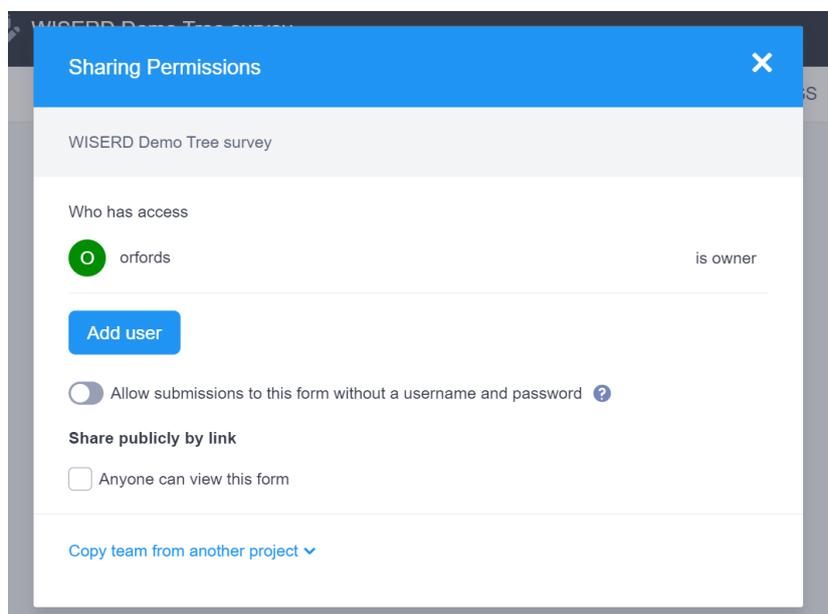


SUMMARY provides a summary of the survey. Currently it is Draft and has 5 questions.

The **Preview form** button in the right-hand panel allows to view what the survey will look like once it has been deployed on-line. You can check for spelling mistakes etc

The **Edit form** button in the right-hand panel allows you to edit the survey if you see something that needs changing in the preview.

Click on the **Share project** button in the right-hand panel. This brings up the Sharing Permissions box.



You can **Add User** who could be a friend or colleague who you want to share the survey and allow them to change it. *You need to know their Kobo username to do this.*

You can then check the boxes of which permissions you want them to have on the survey eg View Form, Edit Form, Edit Submissions etc. Obviously if you allow someone the Edit the form, they will automatically get permission to View it etc.

Click on **Grant permission** button at the bottom to set the new user permissions

New username

apricesw

- View form
- Edit form
- View submissions
 - View submissions only from specific users
 - View submissions based on a condition
- Add submissions
- Edit submissions
 - Edit submissions only from specific users
 - Edit submissions based on a condition
- Validate submissions
 - Validate submissions only from specific users
 - Validate submissions based on a condition
- Delete submissions
 - Delete submissions only from specific users
 - Delete submissions based on a condition
- Manage project

Grant permissions

To share the form with other people so they can complete it, toggle on the “Allow submissions to this form without a username and password”. Also check the “Anyone can see this form” box. This is important if you are sharing it with the general public.

WISERD Demo Tree survey

Who has access

 orfords is owner

 apricesw Add submissions · Edit form · Edit submissions · View form · View submissions  

Add user

Allow submissions to this form without a username and password 

Share publicly by link

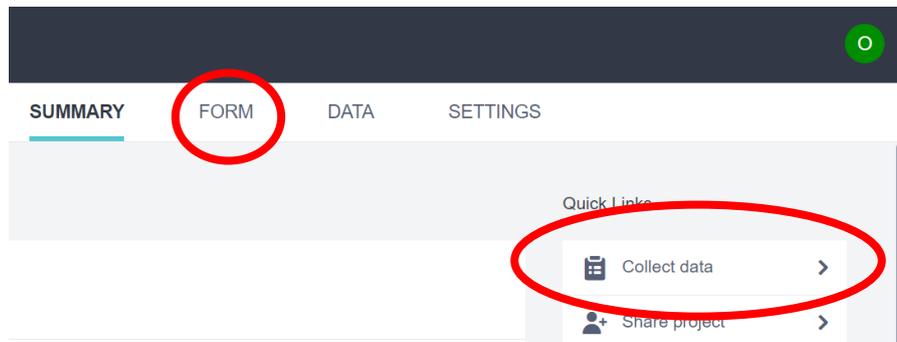
Anyone can view this form

Shareable link

<https://eu.kobotoolbox.org/#!/forms/aCPe3NgEKY7sRKGRu6djEd>

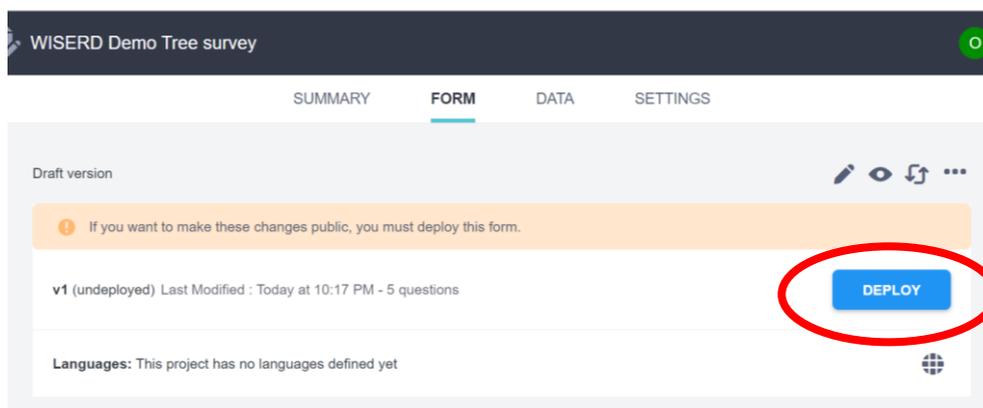
Click on the *close dialog box* cross in the top right hand corner to save the changes

To deploy the survey either click on the **Collect data** button in the right-hand panel of the SUMMARY page or select FORM at the top of the page.



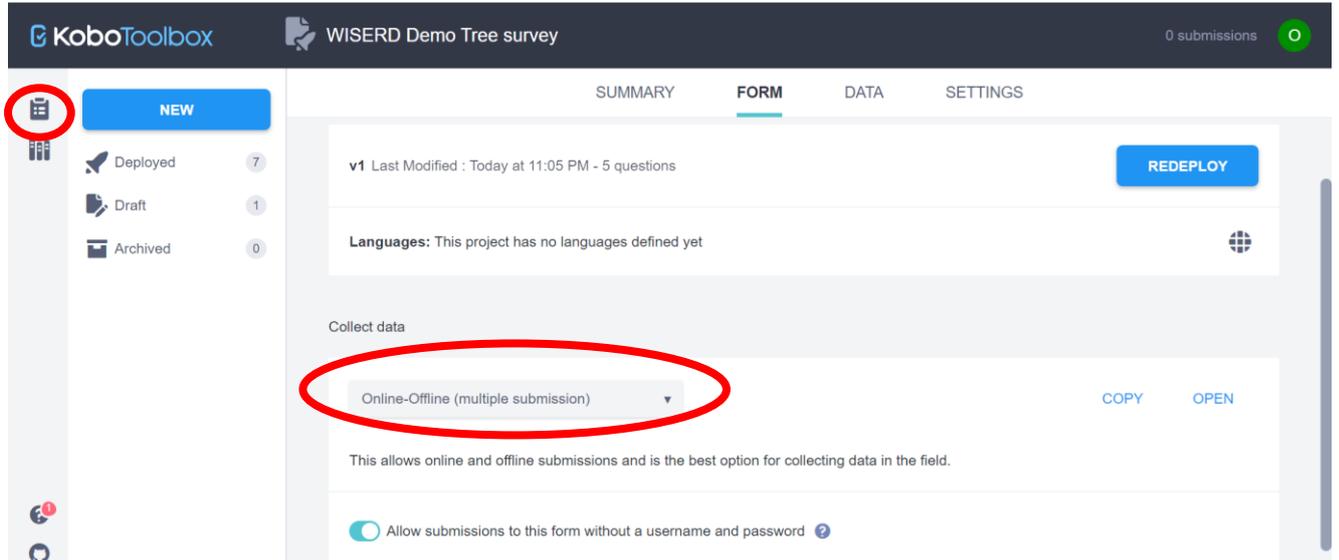
Deploying your survey

To share the survey click on the DEPLOY button



Ensure that the “**Online-Offline (multiple submissions)**” option has been selected from the collect data pull-down menu. This allow the survey to be collected in places where there is no wi-fi or mobile phone signal and it also allows a user to upload a form multiple times (which may be necessary if they are doing something like a tree survey and you want them to collect data on multiple trees – each tree being one form).

You can select different options from the collect data pull-down menu eg Online-only (once per respondent) depending on the purpose of your survey. If in doubt, use the **Online-Offline (multiple submissions)** option.



The screenshot shows the KoboToolbox interface for a survey titled "WISERD Demo Tree survey". The interface is in the "FORM" tab. On the left sidebar, the "NEW" button is circled in red. Below it, there are buttons for "Deployed" (7), "Draft" (1), and "Archived" (0). The main content area shows the survey details: "v1 Last Modified : Today at 11:05 PM - 5 questions" and a "REDEPLOY" button. Below this, there is a "Languages" section stating "This project has no languages defined yet". The "Collect data" section has a dropdown menu with "Online-Offline (multiple submission)" selected, which is circled in red. To the right of the dropdown are "COPY" and "OPEN" buttons. Below the dropdown, there is a description: "This allows online and offline submissions and is the best option for collecting data in the field." At the bottom, there is a toggle switch for "Allow submissions to this form without a username and password" which is currently turned on.

If you make any changes to the Collect data pull-down menu options, you will need to click on the REDEPLOY button.

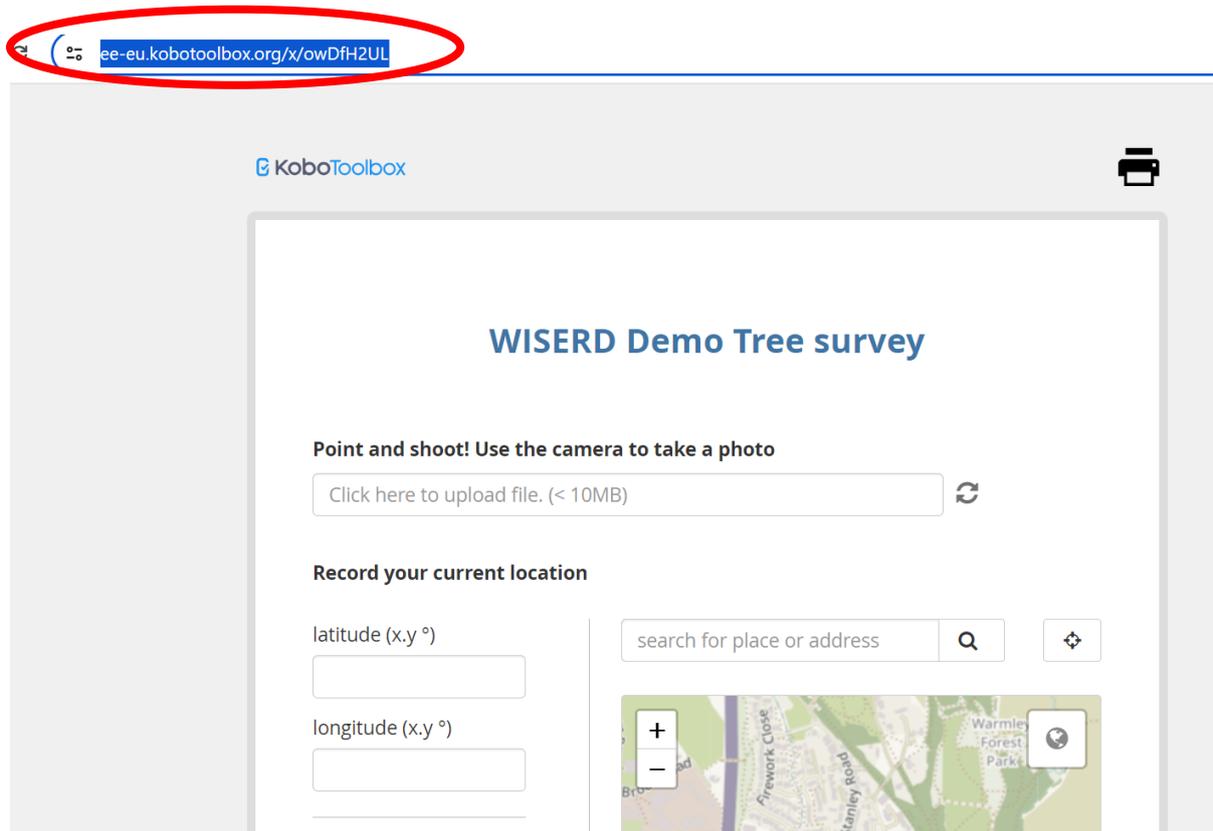
Click on OPEN to preview what your survey will look like on a web-browser.

To go back to the project page, click on the **Projects** button in the top left-hand corner. You will see that the **WISERD Demo Tree survey** is no longer draft and has been deployed.

To make any further changes, click on the project blue title.

Sharing the survey

To share the survey with other people, such as the general public, click on FORM at the top of the page and then OPEN to preview the survey. The URL at the top of the page is the weblink you can share with others.



The screenshot shows a web browser window with the address bar highlighted in red, containing the URL <https://ee-eu.kobotoolbox.org/x/owDfH2UL>. The page content is a survey form titled "WISERD Demo Tree survey" on the KoboToolbox platform. The form includes a file upload field with the text "Click here to upload file. (< 10MB)", a "Record your current location" section with input fields for latitude and longitude, and a map interface with a search bar and zoom controls.

<https://ee-eu.kobotoolbox.org/x/owDfH2UL>