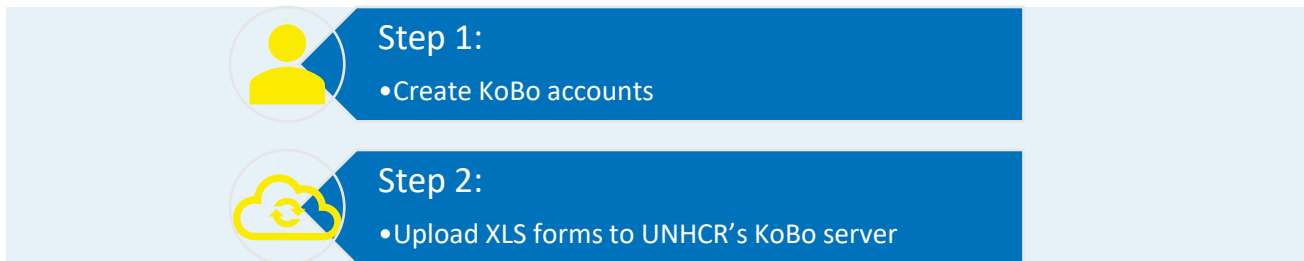


RMS KoBo How-to Guide

⚠ Remember to abide by data protection principles and refer to your Data Sharing Agreement.



Step 1. Create KoBo accounts

For survey partners:

- All partners need to **create an account on [UNHCR's KoBo server](#)** which can be freely accessed by external partners. You can create as many accounts as you want with only one email address.
 - Alternatively, operations (or DIMAs) can create a KoBo account for the survey partner and share the account information with the partner organization.
- The survey partner **creates a single, common KoBo account for all enumerators** who are involved in data collection. This is the account enumerators will use to collect data.
- A **separate account is needed for the partner's survey manager** or for other project managers that are involved in data collection. These accounts will be granted additional permissions, including the ability to edit the surveys submitted by enumerators.

For UNHCR:

- The global **RMS HQ team account** is: *rms_hq*. Regional Bureaux and Country Operations can also create a common account for the purpose of all Results Monitoring Surveys and communicate their KoBo account names accordingly.

Step 2. Upload XLS forms to UNHCR's KoBo server

- **The project name for all surveys should be "RMS [Name of the Country] [Year]"** – for example, "RMS South Africa 2022".
- The **description and sector fields are mandatory**. More detailed information such as population group type, mode of survey or the month of the start of data collection can also be entered.

For survey partners:

- Ensure the XLS form is in its **final version before uploading** the form to UNHCR's KoBo server. The final form should be uploaded prior to enumerator training and should include all field-tested translations. Enumerators will continue to test the form during training and pilot testing, to minimise changes to the form during data collection, which should be avoided.
- The survey partner can deploy the final XLS form themselves or share it with UNHCR colleagues to deploy on their behalf.
 - If the survey is deployed by the partner, partners add relevant **UNHCR colleagues within the country operations, as well as at least one focal point from your DIMA** (check account name with your DIMA) **and RMS HQ team account** (*rms_hq*) to the project and grant 'manage project' permission.
 - If UNHCR colleagues upload and deploy the XLS form, partner colleagues **communicate the KoBo account usernames** created for enumerators, survey managers and any other staff that need to have real time access to the survey.
- Partners can use the same KoBo accounts for enumerator training and data collection.

For UNHCR:

- The **RMS Coordinator** or **RMS data focal point** (i.e., colleague who has basic understanding of questionnaire preparation, XLS form programming and experience in using KoBo) are responsible for **managing the XLS form during the data collection exercise** and are available to respond to any emerging problems. In case no such expertise exists, or in case of issues that cannot be resolved at country level, reach out to your DIMA.
 - If the survey is deployed by the partner, ensure that relevant **UNHCR colleagues from your country operation as well as at least one focal point from your DIMA** (check account name with your DIMA) **and RMS HQ team account** (*rms_hq*) **are added** to the project and granted 'manage project' permission.
 - If survey is uploaded by UNHCR, inform partner of deployment and **grant access at appropriate levels of permission** for the enumerator account and the survey manager account. The necessary permissions for each account are illustrated below.

Roles and permissions	UNHCR			Partner Organization	
	HQ	RB	CO	Enumerators	Survey Manager
View form	x	x	x	x	x
Edit form	x	x	x		x
View submissions	x	x	x	x	x
Add submissions	x	x	x	x	x
Edit submissions	x	x	x		x
Validate submissions	x	x	x		x
Delete submissions	x	x	x		
Manage project	x	x	x		