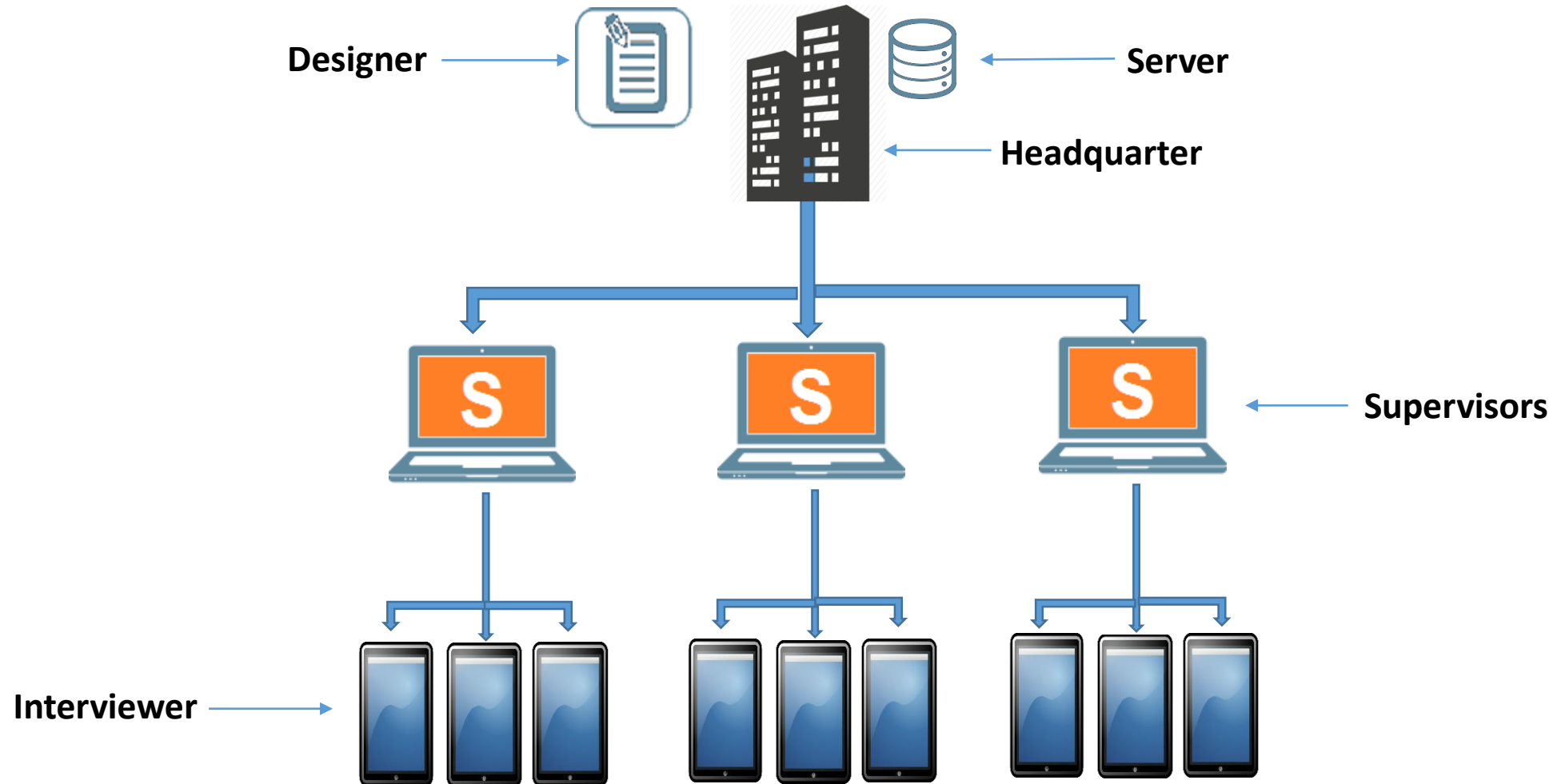


WORKSHOP ON RECRUITMENT COSTS SURVEY

Survey Solutions: Operationalisation (HQ, SUP, INVs)

International Labour Organisation
New Delhi , April 26-27,2018

Workflow



Headquarters

- The Headquarters software is a set of connected tools for the administrator and headquarters users.
- Unlike other components of CAPI, Headquarters roles and responsibilities are to manage the entire survey process.
- It plans survey, manage resources and has authority over other components of Survey Solutions.

Headquarter User Accounts

- Headquarter has authority to create all user accounts;
- Supervisor accounts should be created first;
- Interviewer accounts should be created within an existing supervisor account
- Supervisor or interviewer accounts can be locked by headquarters
- Accounts may get locked if too many incorrect or unauthorized logins occur.

For training purposes, we are using Survey Solutions Demo Server

Headquarters Log In

<https://demo.mysurvey.solutions/Account/LogOn?ReturnUrl=%2F>

Log In: Headquarters1

Pwd: Headquarters1

Functions of Headquarter

- Track the overall progress of the survey;
- Create survey assignments for supervisors and investigators (survey setup)
- Review the completed work by supervisors and interviewers
- Accept or reject the completed work by supervisor and investigator
- Management of resources such as Supervisors, Investigators
- Export the data collected from the assignments for analysis
- Manage work on multiple surveys

Tracking overall progress

Headquarters has mechanisms in place to track overall progress of the survey(s);

- reports of the status of fieldwork progress by;

- questionnaires

- team of supervisors

- status duration

- devices/interviewers

- geography

- speed

Headquarters users can download report as XLSX or CSV or TAB formats.

Progress Reports

- Whether you are relying on a handful of interviewers, or administering a nationwide survey with hundreds of teams, stay in control with rich set of reports that allow tracking the statuses of the questionnaires in the system, determining the bottlenecks and monitoring the progress of the survey and teams performance.
- Ready interviews status report
- Report by supervisors, interviewers, teams
- Chart representation
- Survey progress on map
- Progress report can be extracted anytime
- Daily, weekly or progress report of any duration can be extracted

Supervisor's Role

Supervisors don't conduct interviews and collect the data themselves but play a pivotal role in data collection process:

- supervisors are generally experienced investigators, having good surveys experience, management skill and knowledge about methods and process of data collection
- investigators directly report to supervisors
- respond to enumerators inquiries regarding questionnaire, variable concepts and definitions, logistics, software, hardware issues etc.
- make sure enumerators in their team are properly equipped with survey instruments, questionnaires

Supervisor's Role

- make sure enumerators in their team are properly equipped with survey instruments, questionnaires
- locating households or units where the data collection should occur
- making assignments to the enumerators of their team
- Supervisor don't have to assign all survey household immediately, they can assign in a small batch and more after completion of interviews
- help in locating, mapping of sample/survey households
- assign replacement households when necessary
- verify and assure the quality of survey, collected data, missing information and accordingly take decision to review, accept, reject or re-assign interviews

Supervisor's Role

- Receive Assignment from Headquarters
- Create assignment for investigators

Supervisor Software log in

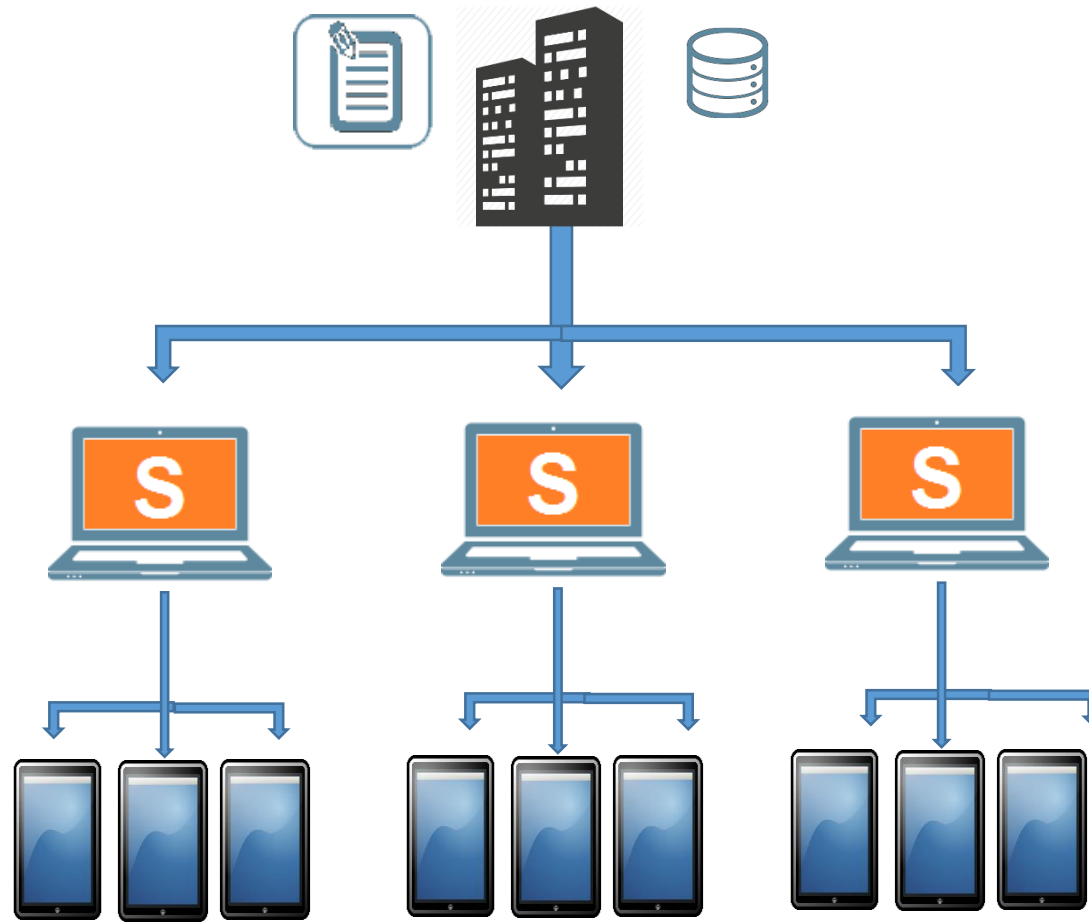
Use Survey Solutions demo server for log in

Use headquarter provided user id and password

<https://demo.mysurvey.solutions/Account/LogOn?ReturnUrl=%2F>

Team supervisors have separate interface (window), can track assignment progress of respective team of interviewers

Workflow



Supervisors **receive** assignment, location of survey, sample etc. from headquarters.

Supervisors **assign** assignment to their respective teams.

Supervisor Software

The components of Supervisor software are

- Reports
 - Surveys and Statuses
 - Team members and Statuses
 - Quantity
 - Speed
 - Map Report
- Interviews
- Teams and Roles
- Assignments
- Supervisors work on desktop or laptop
- Computers must be connected to internet to connect to Survey Solutions headquarter server

Interface Languages

Interviewer application is used for real (on field) data collection or interviews

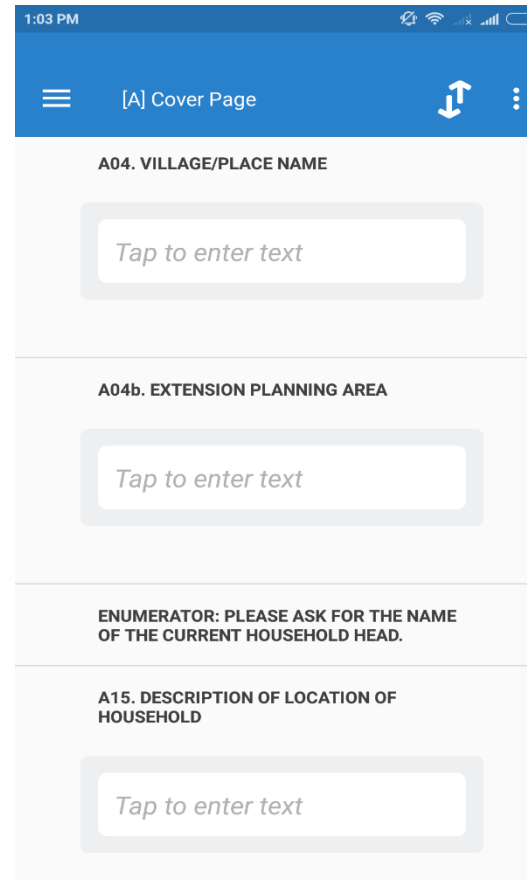
- The application responds to the device language setting of tablets.
- Language setting of tablets leads to localization of interface; it affects menus, dialogs and application error and warning messages.
- The languages supported are;

English	Chinese
French	Thai
Spanish	Indonesian
Portuguese	Khmer
Russian	
- User can still design the questionnaire itself in any language, including the texts of the questions, options, instruction and validation message.

Interviewer Application

The change in device language settings don't change the original questions but device interface.

Example: English to Portuguese



1:03 PM

[A] Cover Page

A04. VILLAGE/PLACE NAME

Tap to enter text

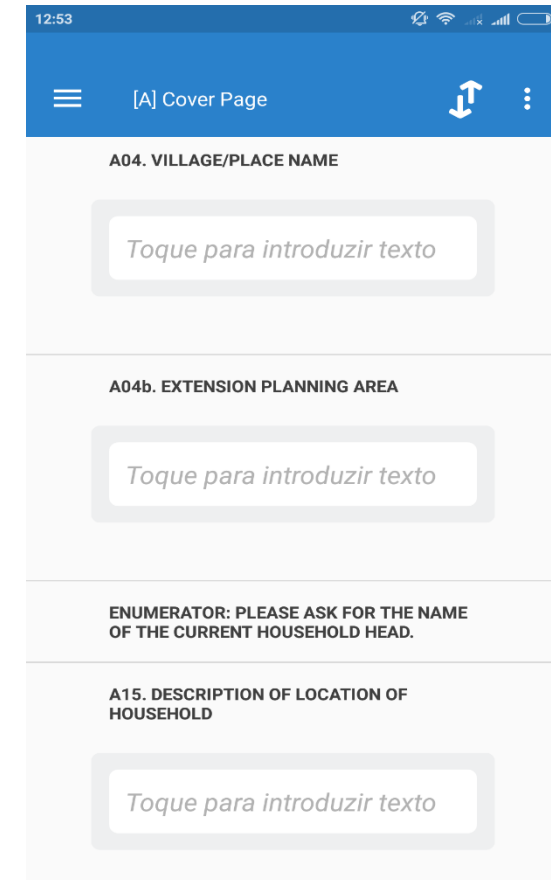
A04b. EXTENSION PLANNING AREA

Tap to enter text

ENUMERATOR: PLEASE ASK FOR THE NAME OF THE CURRENT HOUSEHOLD HEAD.

A15. DESCRIPTION OF LOCATION OF HOUSEHOLD

Tap to enter text



12:53

[A] Cover Page

A04. VILLAGE/PLACE NAME

Toque para introduzir texto

A04b. EXTENSION PLANNING AREA

Toque para introduzir texto

ENUMERATOR: PLEASE ASK FOR THE NAME OF THE CURRENT HOUSEHOLD HEAD.

A15. DESCRIPTION OF LOCATION OF HOUSEHOLD

Toque para introduzir texto

Interviewer Application

The change made in Portuguese language but neither language of the original questionnaire nor the codes had changed.

12:49 PM

[A] Cover Page

ENUMERATOR: PLEASE RECORD THE CURRENT LOCATION OF THE HOUSEHOLD.

Please confirm this information with your supervisor

IHS REGION (USED FOR VALIDATIONS)

☐ North

☐ Central

☐ Southern

A01. DISTRICT

A03b. ENUMERATOR: IS THIS EA RURAL OR URBAN?

☐ URBAN

☐ RURAL

Interviewer Application

The screenshot displays the 'Completo' (Complete) screen of the Interviewer Application. At the top, a green header bar contains a hamburger menu icon, the word 'Completo', and a vertical ellipsis icon. Below the header, a light gray bar displays the message 'You are about to complete interview 76-38-38-53'. The main content area is divided into sections. The first section, titled 'STATUS DE PERGUNTAS', shows three statistics: '5 Respondeu' (answered), 'Não Sem resposta' (no answer), and 'Não Erros' (no errors). The second section, titled 'NOTA PARA SUPERVISOR', features a text input field with the placeholder 'Toque para introduzir texto'. Below this, a green button labeled 'COMPLETO' is visible. At the bottom of the screen, a light gray box contains the text: 'DEPOIS QUE VOCÊ TERMINAR ESTA ENTREVISTA, SERÁ MARCADA COMO CONCLUÍDA E SERÁ ENVIADO PARA SUPERVISOR DURANTE A PRÓXIMA SINCRONIZAÇÃO'. The Android navigation bar is visible at the very bottom.

10:22 da tarde

Completo

You are about to complete interview 76-38-38-53

STATUS DE PERGUNTAS

5 Respondeu	Não Sem resposta	Não Erros
----------------	---------------------	--------------

NOTA PARA SUPERVISOR

Toque para introduzir texto

COMPLETO

DEPOIS QUE VOCÊ TERMINAR ESTA ENTREVISTA, SERÁ MARCADA COMO CONCLUÍDA E SERÁ ENVIADO PARA SUPERVISOR DURANTE A PRÓXIMA SINCRONIZAÇÃO

Interviewer Application

- the application exchanges data between entire CAPI system (supervisors and headquarters);
- data can be remotely synchronized anytime depending on the availability of connectivity;
- end of the survey, the headquarter will aggregate data collected from all the devices into a single large database which can be used by researchers, statisticians, economists, social scientists etc. after data cleaning (if required) for various analysis.

Interviewer Application

Survey Solutions *Interviewer application* is the only program the interviewers work with on field;

- it provides a practical reference on how to perform common tasks;
- it allows data collection in electronic format;
- designed data validation measure (keeping checks and balances, in a pre-specified region, between a fixed longitude and latitude etc.) as well as flow and control;

Interviewer Application

- Normally the tablets are pre-configured in headquarters (resource management office) for interviewers, so that they don't have to change settings, but to click on interviewer icon to start working with the software:



interviewer

Interviewer Application Requirement

Interviewer application tablet requirement:

- works on Android 4.3.1 + devices
- is installed from the headquarter server (not from Google Market)
- personal model: 1 interviewer = 1 device

Interviewer Application

- Survey Solutions Interviewer Software requires three credentials to login into program to start data collection;
 - Synchronization Endpoint (use <https://demo.mysurvey.solutions> in case of demo server)
 - Log in (user id provided by headquarter)
 - Password (provided by headquarter)
- Synchronization Endpoint will be address of localized/personal server in case demo server is not used

Note: According to Survey Solutions team suggestions, to connect to the demo server, users should start the address with “https”. For other servers, this may or may not be “http”.

Installing Interviewer Application

- **Step 1:** On the home screen of the tablet, click on the **Applications** button. The button is usually located in the middle of the bottom toolbar and the icon is a circle with six dots. In the applications menu, Select **Settings**. Select **Security** and make sure that **Unknown Sources - Allow installing application from sources other than the Play Store** is selected/ticked.
- **Step 2:** Open the **Chrome** browser and navigate to the address of your server. If you are using the [demo server](https://demo.mysurvey.solutions) for testing purposes go to <https://demo.mysurvey.solutions>.
- **Step 3:** Click on the **Get Interviewer App** button and wait until the download is completed. If an area question is included in the questionnaire, make sure you also **uncheck the Exclude ESRI Map support check box**.
- **Step 4:** Go back to the home screen and select **Applications—>Downloads**. Click on the last version downloaded and choose **Install**.

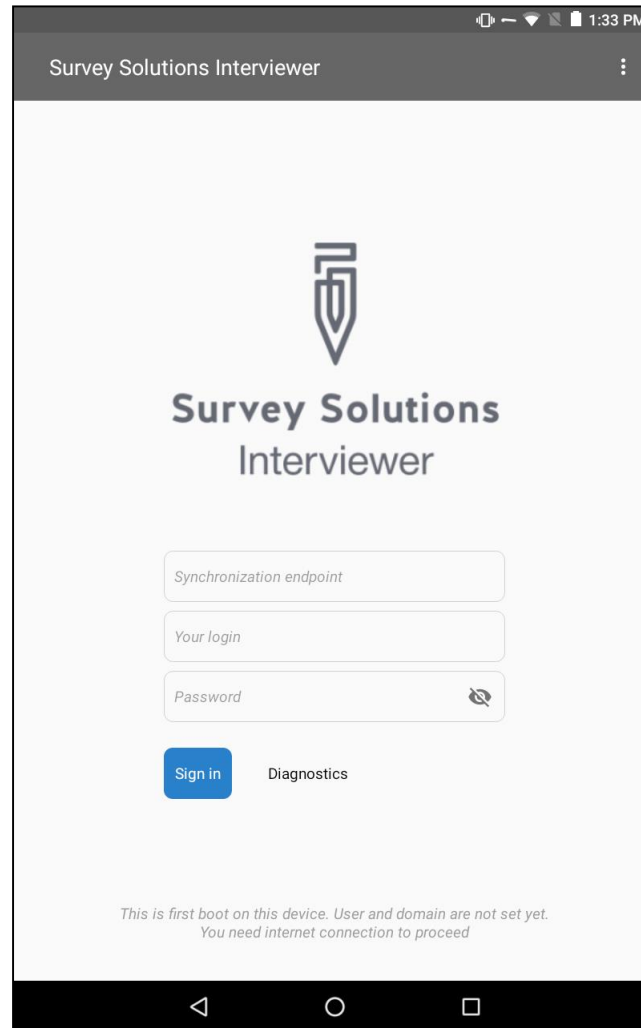
Installing Interviewer Application

- **Step 5:** After the installation is completed, go back to the tablet's home screen and open the ***Interviewer*** Application.
- **Step 6:** Enter the server address *https://demo.mysurvey.solutions* in the Synchronization point, and the enumerator's user name and password. You can reveal the password typed using the eye symbol on the corner of the text field.

When typing the server address, pay attention to whether you should start the address with “http” or “https”. To connect to the demo server, users should start the address with “https”. For other servers, this may or may not be “http”.


- **Step 7:** Tap on the synchronization button

Interviewer Application



The image shows a mobile application interface for the 'Survey Solutions Interviewer'. At the top, a dark header bar contains the text 'Survey Solutions Interviewer' and a three-dot menu icon. Below the header, the app's logo is centered, consisting of a stylized shield icon. Underneath the logo, the text 'Survey Solutions Interviewer' is displayed in a bold, sans-serif font. The main content area features three input fields: 'Synchronization endpoint', 'Your login', and 'Password'. The 'Password' field includes a toggle icon for visibility. Below these fields are two buttons: a blue 'Sign in' button and a 'Diagnostics' link. At the bottom of the screen, a message states: 'This is first boot on this device. User and domain are not set yet. You need internet connection to proceed'. The entire interface is framed by a black border, and the bottom of the screen shows standard Android navigation icons.


Survey Solutions Interviewer



Survey Solutions
Interviewer

Synchronization endpoint

Your login

Password 

[Sign in](#) [Diagnostics](#)

This is first boot on this device. User and domain are not set yet.
You need internet connection to proceed

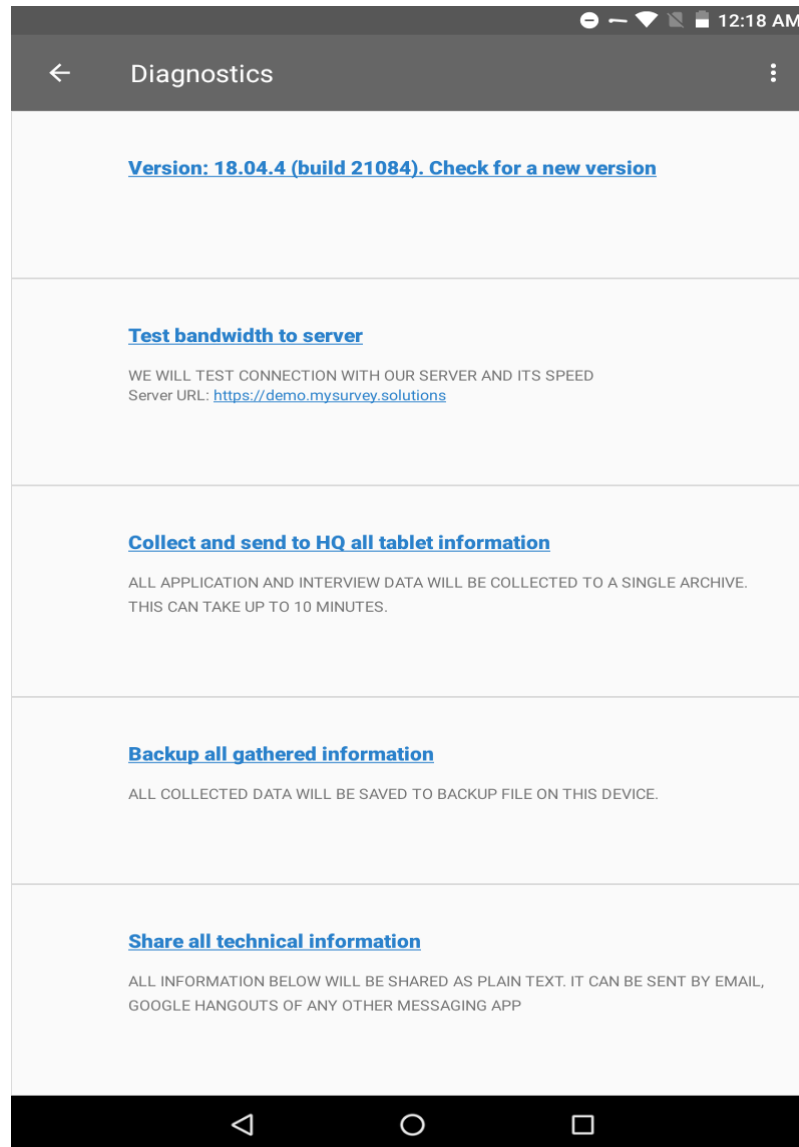
Diagnostics

The Interviewer application consists 'Diagnostics' button to troubleshoot synchronization and functioning issue. Under this menu user can see following measures:

- Updates
- Test network connection
- Manually back up the data collected to Headquarters
- Create a backup of data collected on the tablet device
- Share device specifications and information

Note: According to Survey Solutions team suggestion, these measures should not be taken by interviewers. Supervisors, headquarters and technical persons can take these decisions.

Diagnostics



Interviewer Settings

The screenshot displays the 'Interviewer Settings' application on a tablet. The interface is organized into sections with expandable settings. At the top, a status bar shows the time as 8:06 PM. The 'Interview settings' section includes 'GPS Receive timeout' (Number of seconds to wait for coordinates), 'Desired accuracy of GPS questions' (Number of meters to set accuracy), 'Show location on map' (checked, Load map to show location for GPS questions), and 'Vibrate when invalid answer is given' (checked, The tablet is going to vibrate when an answer didn't pass the validation). The 'Connection settings' section includes 'Supervisor URL' (https://demo.mysurvey.solutions), 'Server Response timeout' (Number of seconds to wait until server response), 'Communication package size' (Number of bytes for package by receiving/transmitting data from/to supervisor application), and 'Event chunk size' (How many events could be read with one query). The 'About application' section shows 'Device ID: 27d21c933920cf90' and 'Application version: 18.04.3 (build 21031)'. The bottom of the screen features a standard Android navigation bar.

Interview settings	
GPS Receive timeout	Number of seconds to wait for coordinates
Desired accuracy of GPS questions	
Number of meters to set accuracy	
Show location on map	<input checked="" type="checkbox"/>
Load map to show location for GPS questions	
Vibrate when invalid answer is given	<input checked="" type="checkbox"/>
The tablet is going to vibrate when an answer didn't pass the validation	
Connection settings	
Supervisor URL	https://demo.mysurvey.solutions
Server Response timeout	
Number of seconds to wait until server response	
Communication package size	
Number of bytes for package by receiving/transmitting data from/to supervisor application	
Event chunk size	
How many events could be read with one query	
About application	
Device ID:	27d21c933920cf90
Application version:	18.04.3 (build 21031)

Note: According to Survey Solutions team suggestions, interviewers must not touch settings.

Assignment

Assigned interview looks like a card with assignment number (supervisor and headquarter will use to identify the assignment), number of interviews, identification details of households to be interviewed.

#20	NLSS 2017 - Community Questionnaire (DRAFT) (v1) To collect: 3 interview(s)
Community Identification:	123
Community Name:	Community
Zone:	North Central
State:	Nasarawa
LGA:	Keffi
Sector:	Urban
START NEW INTERVIEW	

Assignment Status

Assignment Status

- Need to start new interview, move to location
- Started but not completed
- Completed
- Rejected

Interviewer can discard an interview (if he finds problem in it or wrong household selection etc.). Once discarded, it can't be recovered back! Careful!

Exit an interview using Dashboard button while interview in progress (data will be safe) and move to any other assignment.

Resume the unfinished interview.

Interview Rules

If any interview was rejected by supervisor, the interviewer must redo it or give convincing explanation to her/her supervisor.

The tablet vibrates and the questions are surrounded by a red outline, if the recorded answer is not valid. Vibration can be disabled by navigating the interviewer's settings and removing the checkbox.

Dashboard

Interviewer Dashboard helps interviewers in managing the workload.

- It offers an overview of the interviewer's assignments
- Tabs displayed at the top of the dashboard categorizes interview by their status
- The interface will be grey for Create new, Blue for Started, Green for Completed and Red for Rejected
- In earlier versions of Survey Solutions, interviewer follows the assignments, collecting data from sampled households in sample mode or starts surveys in census mode.

Dashboard

1 interviews for Kabhi

Create NewStarted (1)

Interviews which have been started but not completed
You need to complete it to be synchronized

03-05-55-00
Assignment #284

Introduction to Functions Tutorial - Training (v1)
Started on Apr 16, 20:02

OPEN

2 interviews for Kabhi

Create NewStarted (2)

Interviews which have been started but not completed
You need to complete it to be synchronized

03-05-55-00
Assignment #284

Introduction to Functions Tutorial - Training (v1)
Started on Apr 16, 20:02

OPEN

82-54-57-13
Assignment #285

Advanced Roster Tutorial - Training (v1)
Started on Apr 16, 20:27

OPEN

1 interviews for Kabhi

Create NewStarted (1)

Synchronization successfully completed
All assignments were updated

DONE

Create new interview using templates

#284

Introduction to Functions Tutorial - Training (v1)
To collect: 0 interview(s)

START NEW INTERVIEW

#285

Advanced Roster Tutorial - Training (v1)
To collect: 5 interview(s)

START NEW INTERVIEW

2 interviews for Kabhi

Create NewStarted (2)

Interviews which have been started but not completed
You need to complete it to be synchronized

03-05-55-00
Assignment #284

Introduction to Functions Tutorial - Training (v1)
Started on Apr 16, 20:02

OPEN

82-54-57-13
Assignment #285

Advanced Roster Tutorial - Training (v1)
Started on Apr 16, 20:27

OPEN

Dashboards

5 interviews for Kabhi

Create NewStarted (5)

Create new interview using templates

#284

Introduction to Functions Tutorial - Training (v1)
To collect: 0 interview(s)

START NEW INTERVIEW

#285

Advanced Roster Tutorial - Training (v1)
To collect: 4 interview(s)

START NEW INTERVIEW

#337

Copy of KNOMAD Listing ENG (v2)
To collect: 7 interview(s)

Name: Listing Questions Training

START NEW INTERVIEW

5 interviews for Kabhi

Create NewStarted (5)

Interviews which have been started but not completed
You need to complete it to be synchronized

03-05-55-00

Assignment #284

Introduction to Functions Tutorial - Training (v1)
Started on Apr 16, 20:02

OPEN

82-54-57-13

Assignment #285

Advanced Roster Tutorial - Training (v1)
Started on Apr 16, 20:27

OPEN

91-84-89-27

Assignment #337

Copy of KNOMAD Listing ENG (v2)
Started on Apr 21, 22:07

Name: Listing Questions Training

...

72-36-39-72

Assignment #337

Copy of KNOMAD Listing ENG (v2)
Started on Apr 21, 22:10

Name: Listing Questions Training

...

76-38-38-53

Assignment #337

Copy of KNOMAD Listing ENG (v2)

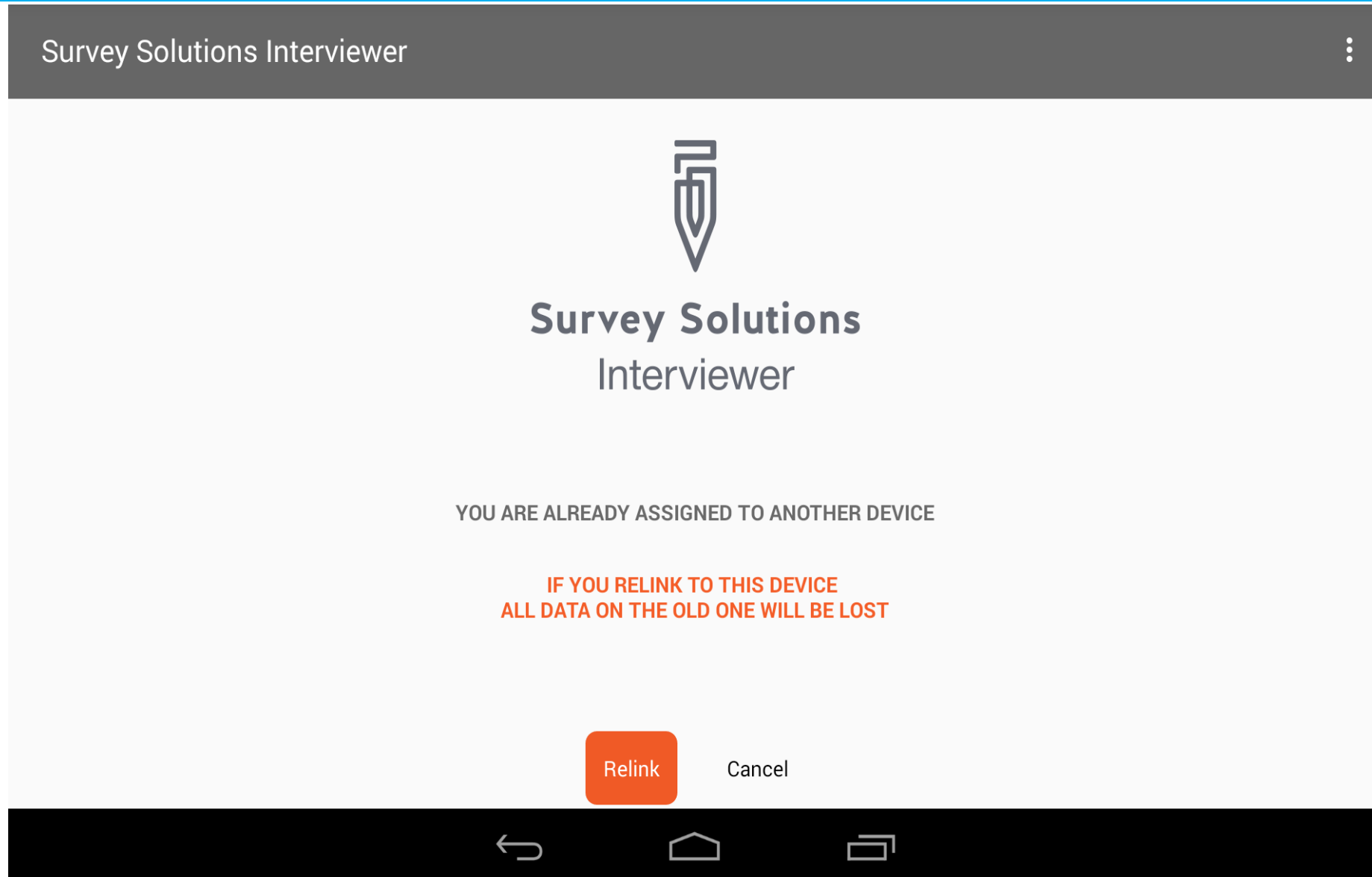
Name: Listing Questions Training

...

Comments

Comments can be left for any questions;
important to note if there is doubt in answer and interviewer needs to explain this to supervisor;
press a question of interest for a moment, comment field will appear and interviewer can type in it;
A comment can also be left to interviewer by supervisors (as a warning note, reaffirm answer, want a more probed answer etc.)

Re-linking



Re-linking

- Once an interviewer has signed in a tablet, that device ID is remembered and interviewer must continue using the same tablet.
- No other interviewer will be permitted to use the same device: they will not be able to enter their username unless the interviewer app is uninstalled (with immediate loss of all unsynchronized data).
- It is not possible for one user to work on several devices.
- When the user attempts to use the second device a warning is issued that the data that belongs to this user on the previous device will be discarded: *"You are already assigned to another device. If you relink to this device all data on the old one will be lost."*
- Re-linking a device causes loss of data collected on the original device. Do not re-link a device unless absolutely required!