Use of CAPI for agricultural surveys

Introduction and case management with Admin/Headquarters/Supervisor
Outline

• Differences b/t Admin, HQ, and Supervisor
• Review overview of workflow and life of a case
• Introduction to Admin, Headquarters and Supervisors
• Headquarters primary functions in SuSo
• Supervisor primary functions in SuSo
• HQ and Supervisor primary responsibilities in SuSo
Learning Objectives

• Know the difference between Administrator, HQ, and Supervisor
• Be familiar with workflow of Survey Solutions and events in the life a case
• Know how to access HQ and Supervisor
• HQ primary functions (create Supervisor, Interviewers, Import Template, Create Cases, Assign Cases to Supervisor)
• Supervisor primary functions (assign cases to Interviewers)
• Use HQ and Supervisor to approve/reject completed cases
• Know about creating field reports with HQ and Supervisor
Differences b/t Admin, HQ, and Supervisor
Administrator

- Functionalities:
  - Create Headquarters (supervisor, interviewers...)
  - Clean the server by removing data

- Location: Server – URL provided by World Bank or Hosting institution

- Has highest level of access

- Trusted

- Kept secure, not widely shared
Headquarters

- Functionalities:
  - Create and assign roles for Supervisors
  - Create interviewers
  - Import questionnaire from designer
  - Approve/reject questionnaires
  - Use reporting tools to monitor data collection
  - Export Data (separate session)

- Location: Server – URL provided by World Bank or Hosting institution
Headquarters – functions w/i SS

• Create and manage teams by:
  – Adding Supervisors
  – Adding Interviewers
  – Import questionnaires (add prefilled data when appropriate)
  – Assigning interviews to Supervisors

• Monitor progress of data collection by:
  – Generating Reports

• Monitor data quality by:
  – Reviewing completed questionnaires (cross checking)
Headquarters – functions o/s SS

• Headquarters is responsible for the overall organization of the data collection. This includes survey design, sampling strategy, data management, logistics, etc.

• As headquarters has an overview of ALL data collected, it is ideally positioned to export and tabulate data in real time to ensure that the targeted precision is being achieved.
Supervisor

• Functionalities:
  – Assign cases to interviews
  – Approve/reject questionnaires
  – Use reporting tools to monitor data collection

• Location: Server – URL provided by World Bank or Hosting institution
Supervisor – functions w/i SS

• Manage data collection by:
  – Assigning Interviews to Interviewers

• Monitor progress of data collection by:
  – Generating Reports

• Monitor quality of data by:
  – Reviewing completed questionnaires
Supervisor – functions o/s SS

• Supervisors do not conduct interviews, but play an important role in the data collection process by:
  – Making sure enumerators have the equipment they need and it’s working properly
  – Managing lists of enumeration units and assigning interviews to enumerators
  – Responding to enumerator questions: equipment, survey logistics, etc. (i.e. first point of contact for problems in the field).
  – In some cases, transportation.
Review overview of workflow and life of a case
Events in the life of a case

- Approved (ApprovedBySupervisor)
- Assigned to supervisor (SupervisorAssigned)
- Completed by interviewer (Completed)
- Rejected by supervisor (RejectedBySupervisor)
- Assigned to interviewer (InterviewerAssigned)
Introduction to Headquarters and Supervisor
HQ and Super: Where to find

- `{servername}.mysurvey.solutions`

- Same URL for HQ and Super
- Login using Super credentials or HQ credentials
HQ Dashboard

<table>
<thead>
<tr>
<th>Template Version</th>
<th>Questionnaire Template</th>
<th>Supervisor Assigned</th>
<th>Interviewer Assigned</th>
<th>Completed</th>
<th>Rejected by Supervisor</th>
<th>Approved by Supervisor</th>
<th>Rejected by HQ</th>
<th>Approved by HQ</th>
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<tbody>
<tr>
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<td>FINAL - Tanzania Crop Forecast_20</td>
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<td>6</td>
<td>3</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>52</td>
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</table>
Supervisor Dashboard
Headquarters primary functions in SuSo

- Create Supervisors
- Create Interviewers and assign to Supervisor
- Import template
- Create Sample
- Assign cases
- Export Data
Headquarters – Create Supervisor
Headquarters – Create Supervisor

- **Add supervisor** allows HQ to create a login for each supervisor.
- **Is locked** blocks the supervisor/interviewer from accessing the server.
Headquarters – Create Interviewer

[Image of a user interface showing filters for Supervisors and Interviewers, with a list of users like moa1, moa2, etc., and dates: Apr 15, 2017 15:45]
Headquarters – Create Interviewer
Headquarters – Import Template

1. Click Import Template button to load a questionnaire from Designer.
2. Click on a questionnaire from the list to create interview assignments.

Use your Survey Solutions Designer credentials to access your questionnaires.
### Headquarters - Import Template

Select a questionnaire to import

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<tr>
<th>TITLE</th>
<th>LAST MODIFIED</th>
<th>CREATED BY</th>
</tr>
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<tr>
<td>RETURN VISIT FOR YIELD - Tanzania Crop Forecast_2017_v1</td>
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<td>you</td>
</tr>
<tr>
<td>AGRIS_Eco_Updated</td>
<td>7 hours ago</td>
<td>shimagm</td>
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<td>AGRIS Core_updated</td>
<td>8 May 2017, 09:35</td>
<td>shimagm</td>
</tr>
<tr>
<td>DPS HouseHold Survey</td>
<td>8 May 2017, 09:00</td>
<td>dpuwes</td>
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<td>Copy of FINAL -Tanzania Crop Forecast_2017_v27_4_17</td>
<td>5 May 2017, 12:39</td>
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<tr>
<td>Cat 3_QUES 3_Crop area by inquiry_GPS_Iswadi</td>
<td>26 Apr 2017, 02:15</td>
<td>inswadi</td>
</tr>
<tr>
<td>CCE Ques I Particulars of parcels selected for crop cutting experiment as well as for physical observation</td>
<td>26 Apr 2017, 02:11</td>
<td>4everługit66</td>
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<tr>
<td>Cat 3_Ques 5B_Assessment_crop produce by farmers recall 15 days to 30 days after harvest_Iswadi_v3</td>
<td>26 Apr 2017, 02:11</td>
<td>4ever_lugit</td>
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<td>26 Apr 2017, 02:10</td>
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<td>26 Apr 2017, 02:10</td>
<td>inswadi</td>
</tr>
</tbody>
</table>
KEY CONCEPT!

Census vs. Sample Mode
• **Sample mode import** is when identifying data is used to help the Interviewer identify the enumeration unit.

• **Import with census mode** is used when no prefilled data exists. This is useful for example in exit polling and listing exercises.
Headquarters – Create Cases

- **New Interview** allows the user to insert pre-filled data one-by-one.
- **Batch upload** allows the user to insert pre-filled data as a tab-delimited file.
- **Web Interview** setup allows self-administered web interviewing (*not covered*)
Headquarters – Create Cases

- **Clone** makes a copy of the questionnaire
- **Delete questionnaire** remove the questionnaire from the server
Headquarters - Create Cases

Create new interview RETURN VISIT FOR YIELD - Tanzania Crop Forecast_2017_v1

Prefilled information

Supervisor Assignment

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5.20.0 (build 16489) | Get Interviewer App
Headquarters – Export Data

- Formats
  - STATA
  - SPSS
  - .tab
- Binary – Photos
- DDI – XML metadata

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<th>Main Survey Data</th>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>DDI</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>XML format</td>
<td>DOWNLOAD</td>
<td></td>
</tr>
</tbody>
</table>
Supervisor primary functions in SuSo

• Assign cases to Interviewers
Supervisor – Assign Cases

• Select an interview, and Assign.
Supervisor – Assign Cases

- HQ assigns cases to Supervisors and Supervisors assign cases to Interviewers.
- HQ/Supervisors can also select multiple cases and Approve or Reject them without visually inspecting the survey. This should not be used as a standard practice.
HQ and Supervisor primary responsibilities in SuSo

• Approve/Reject Completed Cases
• Create Reports
• **Template** filters by questionnaire.
• **Responsible** filters by Supervisor. *In Supervisor mode, filters by Interviewers.*
• **Status** filters by status of questionnaires.
HQ and Super – Approve/Reject

Click to open individual case
HQ and Super – Approve/Reject

- Approve/Reject interviews
- Write comments
- Flag
- Navigation between chapters
HQ and Super – Approve/Reject

- HQ/Supervisors can also select multiple cases and Approve or Reject them without visually inspecting the survey. **This should not be used as a standard practice.**
HQ and Super – Reports

- Reports are used for monitoring the progress of data collection.

- Notably, Supervisors can only create Survey and Statuses, Team and Statuses, Quantity, and Speed reports.
Survey and Statuses tabulates each questionnaire as rows, and the columns are the case statuses. Accordingly, the contents of the table are the frequencies of each questionnaire with the corresponding status.
• **Teams and Statuses** tabulates each Supervisor/Interviewers as rows, and the columns are the case statuses. Accordingly, the contents of the table are the frequencies of each questionnaire assigned to the respective Supervisor/Interviwer with the corresponding status.
Headquarters ONLY reports

- The Map Report and Cumulative Interview Chart report are only available in Headquarters mode. I honestly don’t know why this feature isn’t allowed at the Supervisor level to monitor interviews.
Headquarters ONLY reports

If there is GEO question, then the map report plots the point on a google map and shows metadata about the interview. Notably, clicking details will take you to the completed questionnaire.
Headquarters ONLY reports

Filter by questionnaire, version, and variable.
Headquarters ONLY reports

Cumulative Interview Chart

(Ver. 1) Group 1 Round 4

- Chart shows the number of interviews and respective statuses over time. Can filter by date, and questionnaire.
QUESTIONS?