

# Overview of Survey Solutions

## System and organization of training

# Outline

- What is a “case”?
- 4 Main Pieces
  - What are they?
  - What do they exchange?
- Life events of a case
- How the pieces fit together
- Each piece at a glance

# What is a “case”?

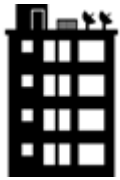
- Case:
  - ***a*** : a set of circumstances or conditions <is the statement true in all three *cases*>
  - ***b*** (1) : a situation requiring investigation or action (as by the police) (2) : the object of investigation or consideration

In surveys, a case refers to a questionnaire applied to a particular household, holding, etc. Otherwise known as an “interview”. If the survey, “Farm survey” is administered to Holder Joe. Then the **questionnaire completed by interviewing Holder Joe is a specific case.**

# The 4 Main Pieces: What are they?



–Designer, for creating questionnaires



–Headquarters, for centralized survey management



–Supervisor, for field-based survey management



–Interviewer, for data collection

# The 4 Pieces: What do they exchange?

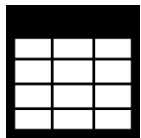
- Information



– Questionnaires—forms to assign



– Assignments—data collection tasks



– Data—information collected using a form



– Status—where an assignments sits in the survey workflow



# Life events of a case

- Conception – Designer + Tester



- Birth – Import and assignment



- School



Events recorded



- Career










Events recorded - Paradata



- First Answer Set
- Completed

# Life Events of a questionnaire

- Retirement   $\xrightarrow{\text{black}} \xleftarrow{\text{red}}$    $\xrightarrow{\text{black}} \xleftarrow{\text{red}}$   Events recorded 
- Data Export  OR   $\xrightarrow{\text{black}}$  

# What the pieces exchange

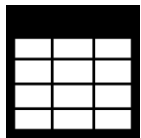
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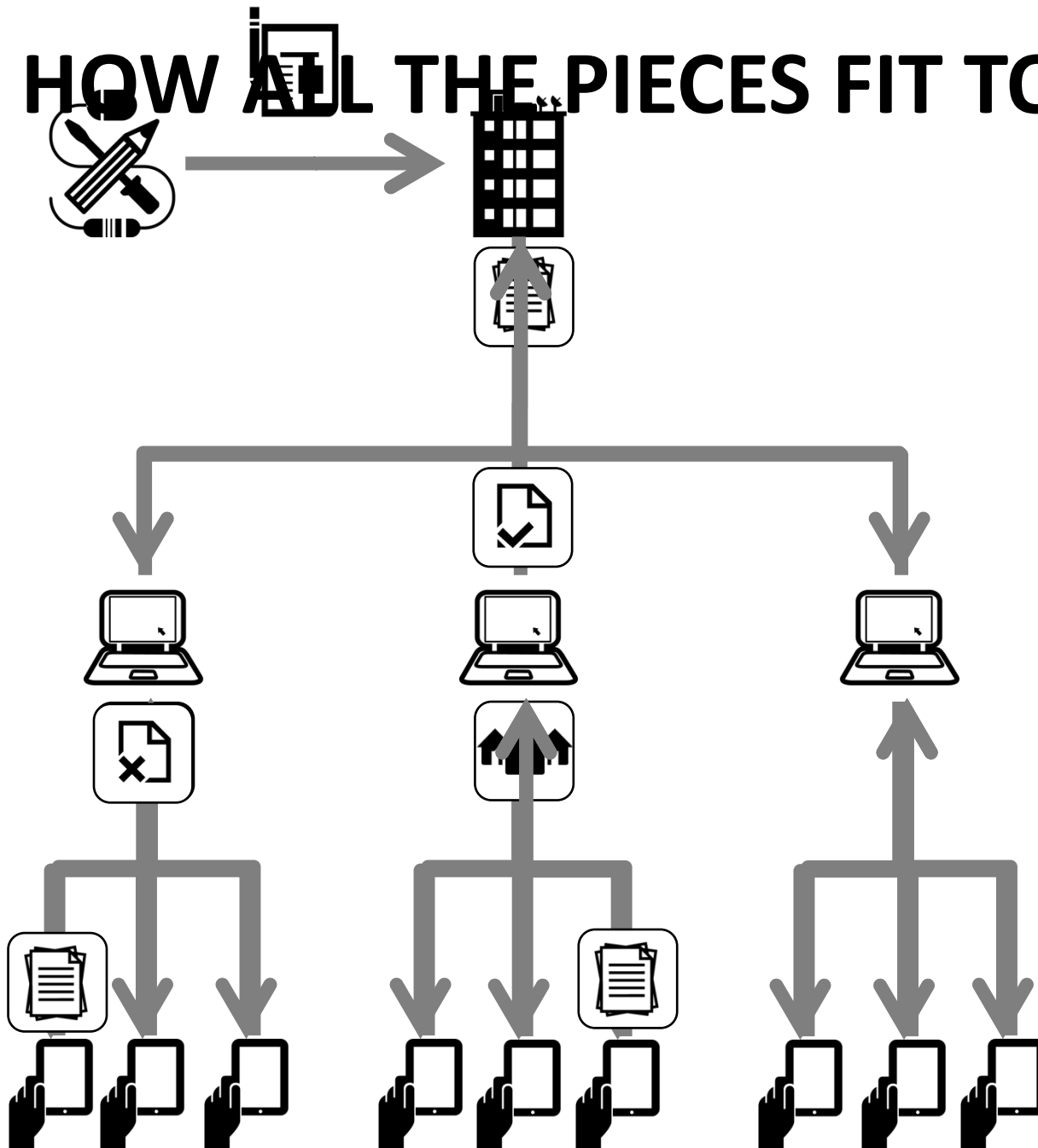


– Status—where an assignments sits in the survey workflow



KEY CONCEPT UP AHEAD!

# HOW ALL THE PIECES FIT TOGETHER



Researchers design questionnaires using visual tools and upload them to the central server

HQ distributes the

@ Internet

@ Internet

Supervisors monitor the submissions

Supervisors assign households to individual interviewers

WiFi



WiFi



Interviewers visit households and collect data

# Brief look at each piece



- Designer, for creating questionnaires



- Headquarters, for centralized survey management



- Supervisor, for field-based survey management



- Interviewer, for data collection



# Designer

- **How used**
  - ***Develop questionnaire content***—modules, rosters, questions
  - ***Dictate skip patterns***—what should be answered under what conditions
  - ***Program validation checks***—how answers should relate to one another and to known norms
- **Where to find it**
  - Web: <https://solutions.worldbank.org/>



# Designer, in images

MY QUESTIONNAIRE  
DRAFT2

MY QUESTIONNAIRES / PUBLIC QUESTIONNAIRES /  
DRAFT2 Tanzania NPS 2013/2014 Household Questionnaire (672Q, 32G, 36R) [VERIFY](#)

SECTION A-1

HOUSEHOLD IDENTIFICATION

12 REGIONregion

12 DISTRICTdistrict

12 WARDward

12 VILLAGE/ENUMERATION AREAvillage\_ea

A8 KITONGOJI OR MTAA NAMEmtaa\_name

12 HOUSEHOLD ID (FROM LIST)hh\_id

A8 NAME OF HOUSEHOLD HEADhead\_name

A8 NAME OF HOUSEHOLD HEAD FROM NPS YEAR 2head\_name\_v2

12 FULL HOUSEHOLD IDENTIFICATION FROM NPS YEAR 2full\_hh\_id\_v2

8- IS THIS HOUSEHOLDhh\_split

8- LOCATION OF HOUSEHOLDlocation

A8 NAME OF TRACKING TARGET FROM NPS YEAR 2name\_track\_v2

12 ROSTER ID OF TRACKING TARGET FROM NPS YEAR 2rosterid\_track\_v2

12 LOWEST ROSTER ID NUMBERlowest\_roster\_id

A8 DESCRIPTION OF LOCATION OF HOUSEHOLDdesc\_location

A-2: SURVEY STAFF DETAILS

A8 TIME INTERVIEW STARTtime\_start

A8 OBSERVATIONS ON THE INTERVIEWobservations

[ADD QUESTION](#) [ADD SUBGROUP](#) [ADD ROSTER](#) [ADD STATIC TEXT](#)

SECTION V: ANTtype\_marr\_spouse1

SECTION H: FOOtype\_marr\_spouse2

ADD NEW CHAPTERtype\_marr\_spouse3

type\_marr\_spouse4

spouse\_in\_hh

name\_spouse

[SAVE](#) [CANCEL](#)

This document is public [SETTINGS](#) [OLD DESIGNER](#) [LOG OUT](#)

This document is public [SETTINGS](#) [OLD DESIGNER](#) [LOG OUT](#)

SECTION A-1 / HOUSEHOLD IDENTIFICATION /

Question Type

12 Numeric

Variable name(?)

region

Variable Label(?)

Title

REGION

☐ Is Integer

Count Of Decimal Places

[ADD INSTRUCTION](#)

Condition expression (?)

Validation expression (?)

[this]<100

Validation message (?)

The region code is defined by two digits.

☐ Mandatory question

Question scope

Interviewer

[SAVE](#) [CANCEL](#) [DELETE](#) [CLONE](#) [MOVE TO >](#)

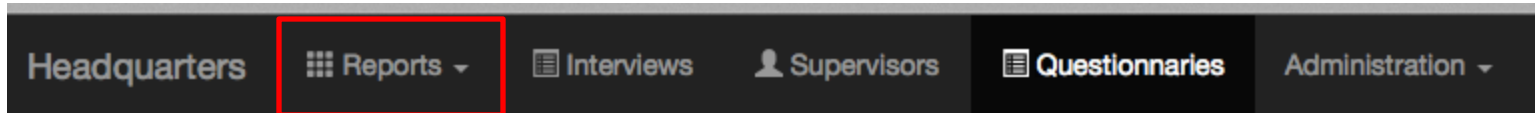


# Headquarters

- **How used**
  - ***Define the survey project***—survey staff, sample, and instruments
  - ***Manage workload***—assign work to supervisors
  - ***Control quality***—review supervisors' work
  - ***Manage data export***—output structured data at any point
- **Where to find it**
  - Cloud-hosted server, or
  - Self-hosted server



# Headquarters, in images



## Questionnaires

Import template

| Title  |                            | Export Data |
|--|----------------------------|-------------|
| Bangladesh Labour Force and Child Labour Survey 2015-18 (ver. 1) | Batch upload New Interview | CSV Delete  |
| Bangladesh Labour Force and Child Labour Survey 2015-18 (ver. 2) | Census mode                | CSV Delete  |
| SAINT LUCIA Labour Force (ver. 1)                                | Batch upload New Interview | CSV Delete  |
| Agricultural census (ver. 1)                                     | Batch upload New Interview | CSV Delete  |
| FEMME SEMAINE 1 ESA2N (ver. 1)                                   | Batch upload New Interview | CSV Delete  |
| HOMME SEMAINE 1 ESA2 (ver. 1)                                    | Batch upload New Interview | CSV Delete  |
| LSMS_Listing (ver. 1)  | Batch upload New Interview | CSV Delete  |
| Test (ver. 1)  | Batch upload New Interview | CSV Delete  |

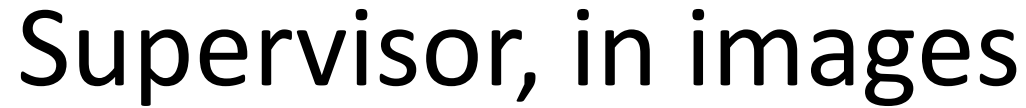
RejectedByHeadquarters  
ApprovedByHeadquarters

|                          |   |       |           |                          |                    |                          |
|--------------------------|---|-------|-----------|--------------------------|--------------------|--------------------------|
| <input type="checkbox"/> | Region:2, Area of residence:Urban, Household address:Harvard St. 9838 | Peter | 6/25/2014 | <input type="checkbox"/> | SupervisorAssigned | <input type="checkbox"/> |
|--------------------------|---|-------|-----------|--------------------------|--------------------|--------------------------|



# Supervisor

- **How used**
  - ***Manage workflow***—assign interviews to interviewers
  - ***Control quality***—review interviewers' work, approving or rejecting it
- **Where to find it**
  - Cloud-based (online)
  - Web-based (offline with synchronization to HQ)



Reports

 Interviewers

Reports

 Interviewers

Hi, SupSup1 ▾

|                    |                                     |              |                |                   |                 |               |               |                    |                    |                      |                                     |                               |                                     |  |
|--------------------|-------------------------------------|--------------|----------------|-------------------|-----------------|---------------|---------------|--------------------|--------------------|----------------------|-------------------------------------|-------------------------------|-------------------------------------|--|
| <div>SupSup1</div> | <div><input type="checkbox"/></div> | <div>1</div> | <div>123</div> | <div>ENFANT</div> | <div>fdfs</div> | <div>12</div> | <div>12</div> | <div>fdfsdfs</div> | <div>SupSup1</div> | <div>9/20/2014</div> | <div><input type="checkbox"/></div> | <div>SupervisorAssigned</div> | <div><input type="checkbox"/></div> | <div></div> |
|--------------------|-------------------------------------|--------------|----------------|-------------------|-----------------|---------------|---------------|--------------------|--------------------|----------------------|-------------------------------------|-------------------------------|-------------------------------------|--|




# Interviewer

- **How used**
  - ***Receive assignments***—new questionnaires, new interviews
  - ***Complete assignment***—collect data, module by module
  - ***Submit assignment***—confirm all questions are answered, send completed assignment for review
- **Where to find it**
  - Tablet



# Interviewer, in images

Survey Solutions Interviewer




**Survey Solutions  
Interviewer**

[Sign in](#) [Troubleshooting](#)

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

1 2 3 4 5 6 7 8 9 0 Del  
q w e r t y u i o p  
a s d f g h j k l Done  
↑ z x c v b n m , ! . ? ↑  
Ctrl Sym English(UK)

0 assignments for temp\_inter

 **Synchronization successfully completed**  
All assignments were updated


0 completed interviews uploaded  
0 interviews deleted  
0 rejected interviews returned  
0 new interviews downloaded

No New

Training IASRI questionnaire (v1)

[CREATE INTERVIEW](#)

Census mode, Interviews created: 0

 **Extension Services**

**I01. Did anyone in this household receive advice/  
information about agricultural/ livestock activities  
from any of the following sources in the past 12  
months?**

☐ NATIONAL AGRICULTURAL ADVISORY  
SERVICES (NAADS)

☐ INPUT SUPPLIER

☐ NGO

☐ COOPERATIVE/FARMER'S ASSOCIATION

☐ LARGE SCALE FARMER

☐ OTHER EXTENSION SERVICES

**I09. Are you informed of training programs organized  
by NAADS?**

☐ YES

☐ NO

**I10. Has any member of your household participated  
in a training program organized by NAADS in the past**



# Interviewer, in more images

Household Identification & Interview Details

HOUSEHOLD IDENTIFICATION

A01. DISTRICT

Tap to enter text

IGANGA

MAYUGE

SERERE

SIRONKO

A04. PARISH/WARD

A05. VILLAGE NAME

1 2 3 4 5 6 7 8 9 0 Del

q w e r t y u i o p

a s d f g h j k l Done

^ z x c v b n m , . ?

Ctrl Sym English(US)

Complete

You are about to complete this interview

QUESTIONS STATUS

70 Answered

30 Unanswered

No Errors

NOTE FOR SUPERVISOR

Tap to enter text

Complete

AFTER YOU FINISH THIS INTERVIEW IT WILL BE MARKED AS COMPLETED AND WILL BE UPLOADED TO SUPERVISOR DURING YOUR NEXT SYNCHRONIZATION

# Organization of training

- Day 1 (Monday) Overview and Getting started with the **Designer**
- Day 2 (Tuesday): Basic **Designer**
- Day 3 (Wednesday): Intermediate **Designer**
- Day 4 (Thursday): Case management with **HQ**, **Supervisor**, completing interviews with **Interviewer**.
- Day 5 (Friday): Data export with **HQ** and AOB

QUESTIONS?