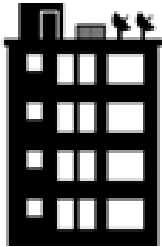


Introduction and case management with Admin/Headquarters/Supervisor



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

Designer



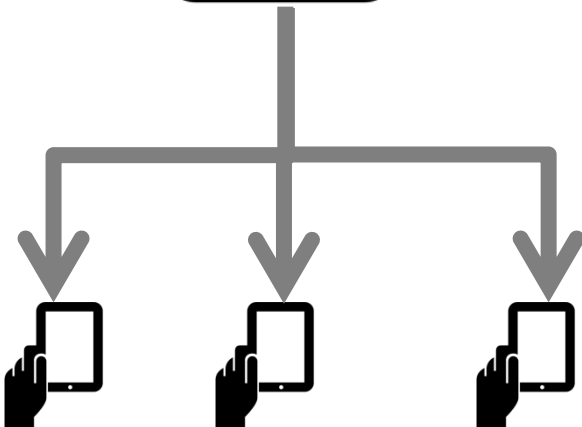
Headquarters



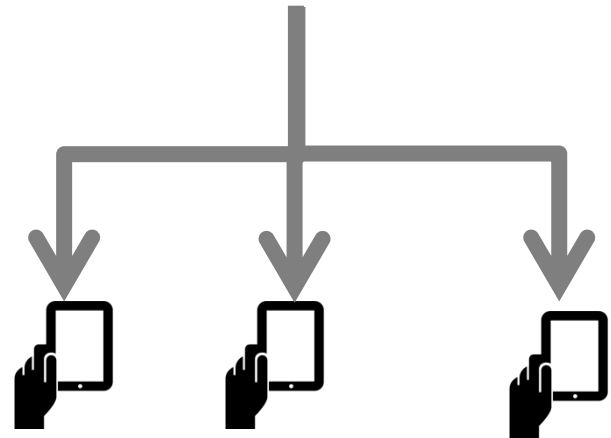
Supervisor



Supervisor



Interviewers



Interviewers

Administrator

- Functionalities:
 - Create and assign Headquarters role
 - 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
 - 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
 - Reviewing sync logs
- Monitor data quality by:
 - Reviewing completed questionnaires

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

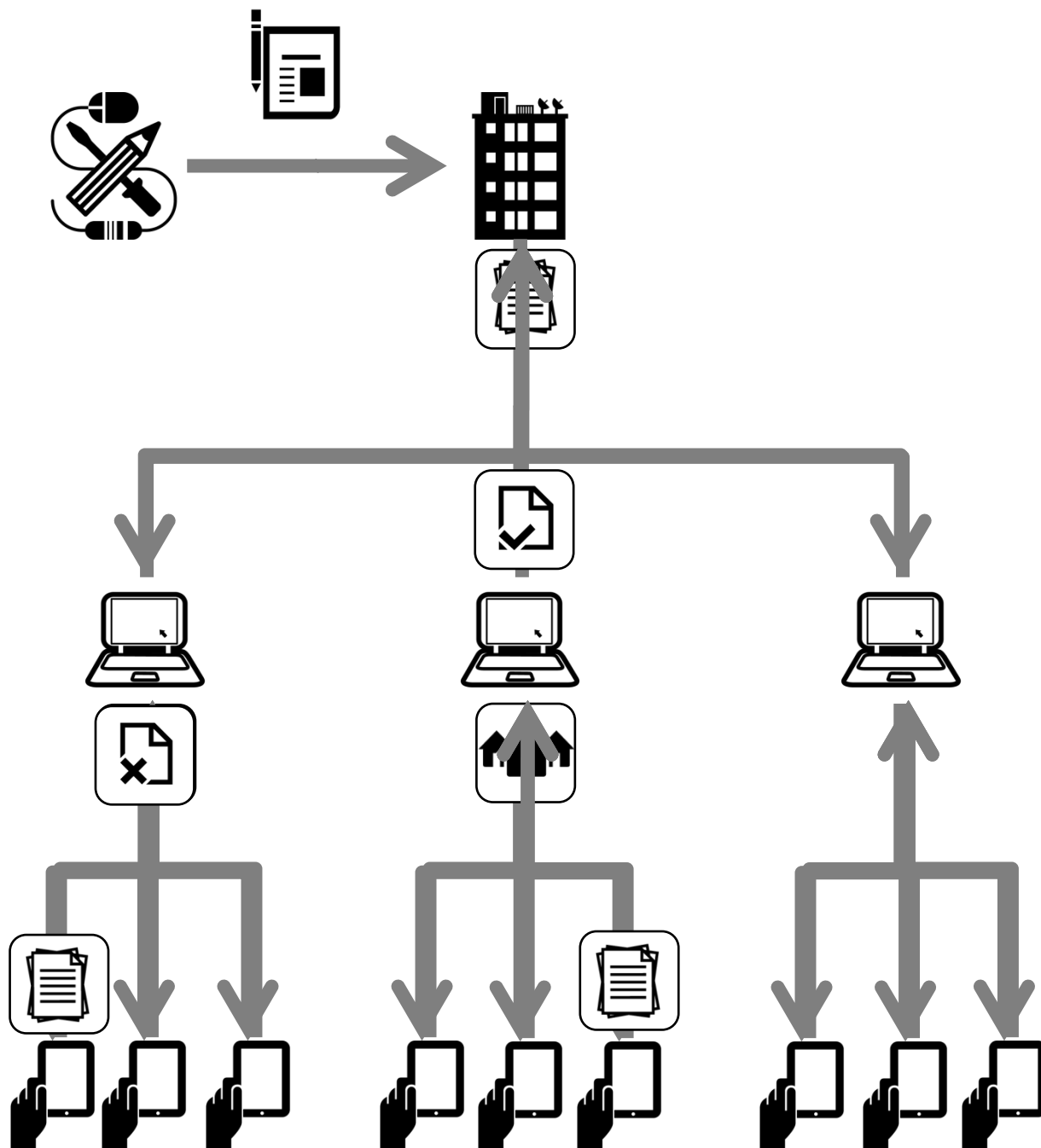
Supervisor – functions w/i SS

- Manage data collection by:
 - Assigning Interviews to Interviewers
- Monitor progress of data collection by:
 - Generating Reports
 - Reviewing sync logs
- 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 re: 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



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

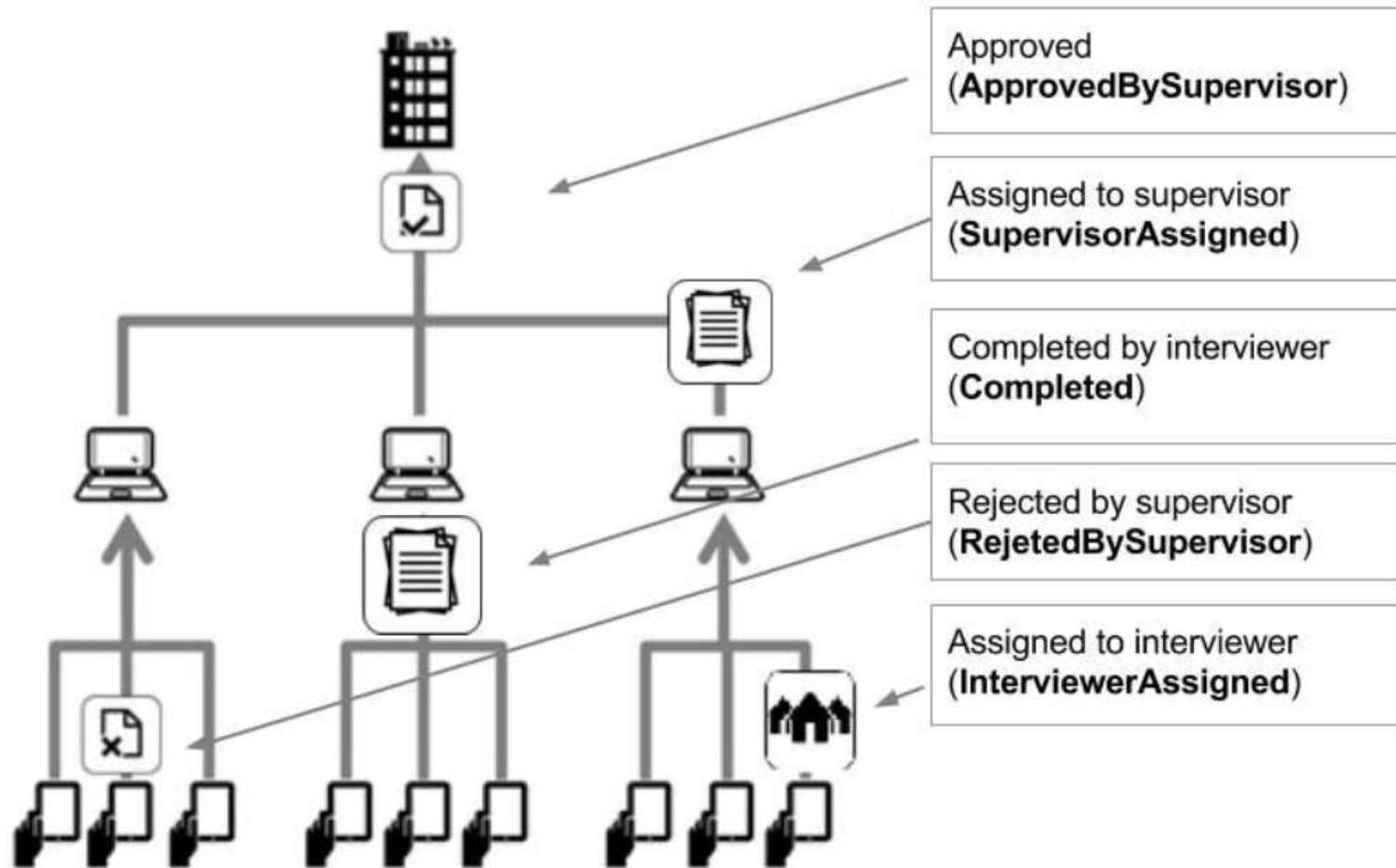


Interviewers visit households and collect data

Events in the life of a case

- Each event that happens in the life of a case is recorded with a time and date stamp. This metadata is made available through “Status” in reporting tables, and exportable metadata (more on the later is S.4).
- The events are:
 1. Created
 2. Supervisor Assigned
 3. Interviewer Assigned
 4. First Answer Set
 5. Completed
 6. Approved/Rejected by Supervisor
 7. Approved/Rejected by HQ
 8. Restarted

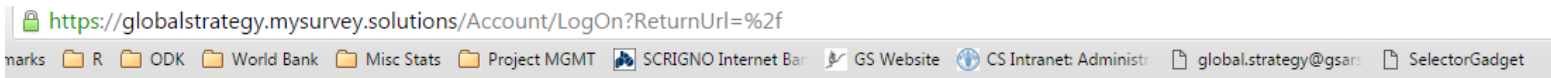
Events in the life of a case



Introduction to Headquarters and Supervisor

HQ and Super: Where to find

- ***[servername].mysurvey.solutions***



Please log in

User name

Password

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

HQ Dashboard

Headquarters

Reports

Interviews

Teams and Roles

Survey Setup

Data Export

GlobalStrategy

Hide filter

Supervisors

Any

Surveys and Statuses

Survey Name	Supervisor assigned	Interviewer assigned	Completed	Rejected by supervisor	Approved by supervisor	Rejected by HQ	Approved by HQ	Total
Gender - Version1 (ver.2)	1	0	0	0	0	0	0	1
Gender - Version1 (ver.3)	0	0	1	0	0	0	0	1
Gender - Version1_prefilled (ver.1)	0	1	1	0	0	0	0	2
AGRIS Labour 4 waves - Holding (ver.1)	0	0	0	0	0	0	2	2
AGRIS TEST - C CHIALASTRI (ver.1)	1	0	0	0	0	0	0	1

Supervisor Dashboard

Supervisor

Reports

Interviews

Team and Roles

Michael

Hide filter

Team members

Any

Surveys and Statuses

Survey Name	Supervisor assigned	Interviewer assigned	Completed	Rejected by supervisor	Approved by supervisor	Rejected by HQ	Approved by HQ	Total
Gender - Version1_prefilled (ver.1)	0	1	1	0	0	0	0	2
AGRIS Labour 4 waves - Holding (ver.1)	0	0	0	0	0	0	2	2

Headquarters primary functions in SuSo

- Create Supervisors
- Create Interviewers and assign to Supervisor
- Import template
- Create Sample
- Assign cases
- Approve completed cases

Headquarters – Create Supervisor

Headquarters Reports Interviews Teams and Roles

Supervisors

Any

Surveys ar

Supervisors
Interviewers
Batch User Upload

Survey Name	Supervisor assigned
Gender - Version1 (ver.2)	1
Gender - Version1 (ver.3)	0
Gender - Version1_prefilled (ver.1)	0
AGRIS Labour 4 waves - Holding (ver.1)	0
AGRIS TEST - C CHIALASTRI (ver.1)	1

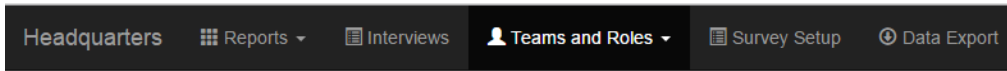
Headquarters Reports Interviews Teams and Roles Survey Setup Data Export

Supervisors

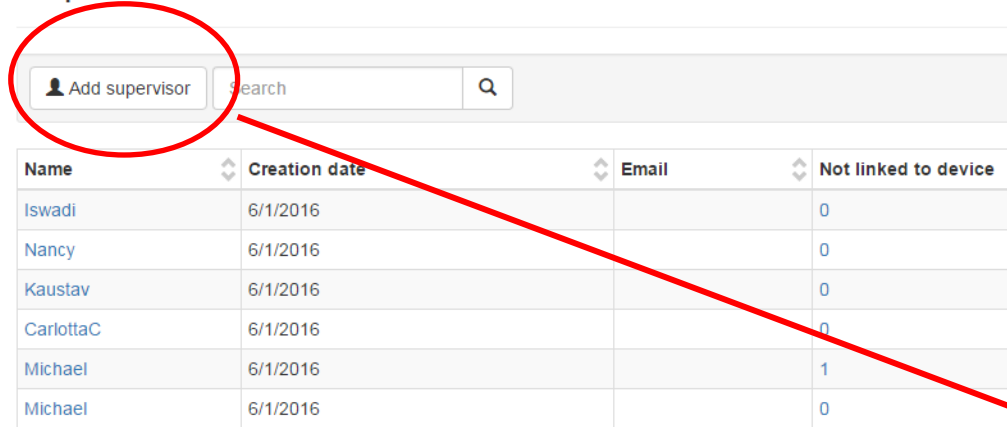
Add supervisor Search

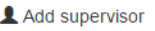

Name	Creation date	Email	Not linked to device
Iswadi	6/1/2016		0
Nancy	6/1/2016		0
Kaustav	6/1/2016		0
CarlottaC	6/1/2016		0
Michael	6/1/2016		1
Michael	6/1/2016		0

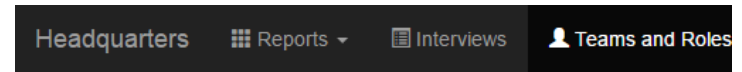
Headquarters – Create Supervisor



Supervisors



 Search 				
Name	Creation date	Email	Not linked to device	
Iswadi	6/1/2016		0	
Nancy	6/1/2016		0	
Kaustav	6/1/2016		0	
CarlottaC	6/1/2016		0	
Michael	6/1/2016		1	
Michael	6/1/2016		0	



Create supervisor

* User name

* Password

* Confirm password

Email

Full name

Phone number

☐ Is locked by Admin or HQ

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

Headquarters – Create Interviewer

Headquarters Reports Interviews Teams and Roles

Hide filter

Supervisors

Any

Surveys are

Supervisors
Interviewers
Batch User Upload

Survey Name	Supervisor assigned
Gender - Version1 (ver.2)	1
Gender - Version1 (ver.3)	0
Gender - Version1_prefilled (ver.1)	0
AGRIS Labour 4 waves - Holding (ver.1)	0
AGRIS TEST - C CHIALASTRI (ver.1)	1

Headquarters Reports Interviews Teams and Roles Survey Setup Data Export

Interviewers

Create Search

Name	Creation date	Email	Supervisor
Kaustav_1	6/1/2016		Kaustav
Michael_1	6/1/2016		Nancy
Nancy_1	6/1/2016		Nancy
Iswadi_1	6/1/2016		Iswadi
Kevin	6/1/2016	asdfas@gasdlfk.com	Nancy
MichaelInter	6/1/2016		Michael
IntCarlotta	6/1/2016		CarlottaC
MichaelInt	6/1/2016		Michael

Headquarters – Create Interviewer

Headquarters | Reports | Interviews | **Teams and Roles** | Survey Setup | Data Export

Interviewers

Supervisor: Any

Connected to device: Any

Archive status: Active users

Create | Search

Name	Creation date	Email	Supervisor
Kaustav_1	6/1/2016		Kaustav
Michael_1	6/1/2016		Nancy
Nancy_1	6/1/2016		Nancy
Iswadi_1	6/1/2016		Iswadi
Kevin	6/1/2016	asdfas@gasdlfk.com	Nancy
MichaelInter	6/1/2016		Michael
IntCarlotta	6/1/2016		
MichaelInt	6/1/2016		

Headquarters | Reports | Interviews | **Teams and Roles** | Survey Setup | Data Export

Create interviewer in team

* Supervisor: CarlottaC

* User name:

* Password:

* Confirm password:

Email:

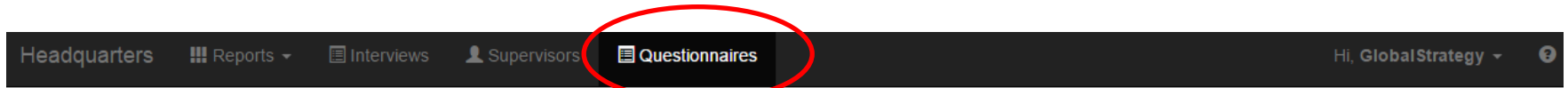
Full name:

Phone number:

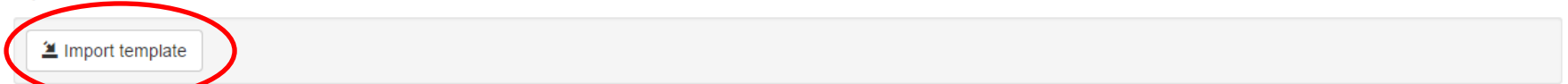
Is locked by Admin or HQ: ☐

Save changes Cancel

Headquarters – Import Template



Questionnaires



Census	Title	Version	Creation Date	Last Entry Date	Actions
✓	CENSUS_Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test	2	03/17/2015	03/18/2015	
	Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test	4	03/17/2015	03/18/2015	
✓	CENSUS_Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test	3	03/17/2015	03/18/2015	
✓	ARDS_Tanzania MONTHLY	1	04/11/2015	04/13/2015	



Attention! Before log in, please make sure that the 'Designer' website is available and it's not in the maintenance mode

Please sign in to designer

michael_rahija

.....







Sign in

Headquarters - Import Template

Headquarters Reports ▾ Interviews Supervisors Questionnaires Hi, GlobalStrategy ▾

Designer Questionnaires

Search

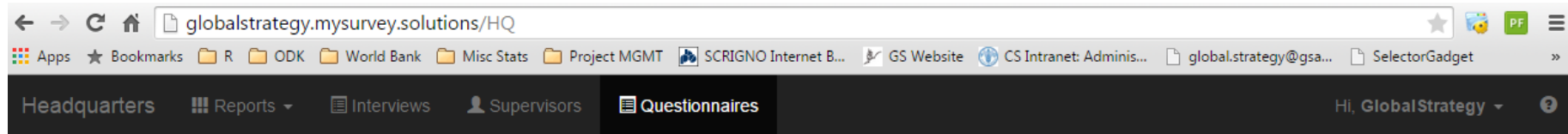
Title	
DURBAN_LSMS_HH_demo4Michael	 Import  Import with census mode
CROP - Test - Questionnaire	 Import  Import with census mode
ARDS_Tanzania MONTHLY	 Import  Import with census mode

- Regular **import** is when pre-filled in 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 excersises.

KEY CONCEPT!









Census vs. Sample Mode

Headquarters – Create Cases



Questionnaires

Import template

isus	Title	Version	Creation Date	Last Entry Date	Actions
✓	CENSUS_Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test	2	03/17/2015	03/18/2015	
	Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test	4	03/17/2015	03/18/2015	 
✓	CENSUS_Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test	3	03/17/2015	03/18/2015	 
✓	ARDS_Tanzania MONTHLY	1	04/11/2015	04/13/2015	
	DURBAN_LSMS_HH_demo4Michael	1	01/28/2015	05/05/2015	 

- **Batch upload** allows the user to insert pre-filled data as a tab-delimited file.
- **New Interview** allows the user to insert pre-filled data one-by-one.

Headquarters - Create Cases

Headquarters

Reports

Interviews

Teams and Roles

Survey Setup

Data Export

GlobalStrategy

Create new interview Gender - Version1_prefilled

Name of holder (test)

T Joe

Responsible

Michael

✕

Create

Cancel

Prefilled information

Supervisor Assignment

© 2016 The World Bank Group, All Rights Reserved. Legal.

5.9.10 (build 12369) | Get Interviewer App

Supervisor primary functions in SuSo

- Assign cases to Interviewers

Supervisor – Assign Cases

Supervisor | Reports | Interviews | Interviewers | Hi, Supervisor1

Filter | Hide filter

Template: Any

Responsible: Any

Status: Any

Interviews

Assign interviewer | Approve | Reject | Search

Interviewer1

	Responsible	Last Update	Has Errors	Status	Created on Client	
<input type="checkbox"/> Pre-filled Questions						
<input type="checkbox"/>	Interviewer1	3/19/2015		Completed	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Interviewer1	3/19/2015		Completed	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> ID3. Name of Responsible District Veterinary Officer::MichaelJordan	Interviewer1	3/18/2015		ApprovedByHeadquarters	<input type="checkbox"/>	

- Select an interview, and **Assign an interviewer.**
- 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

HQ and Super – Approve/Reject

Headquarters Reports Interviews Supervisors Questionnaires Hi, GlobalStrategy

Filter Hide filter

Template Any

Responsible Any

Status Any

Interviews

Approve Reject Delete Search

Pre-filled Questions	Responsible	Last Update	Has Errors	Status	Created on Client	
	Interviewer1	3/19/2015		Completed	<input checked="" type="checkbox"/>	
	Interviewer1	3/19/2015		Completed	<input checked="" type="checkbox"/>	
ID3. Name of Responsible District Veterinary Officer::MichaelJordan	Interviewer1	3/18/2015		ApprovedByHeadquarters	<input type="checkbox"/>	

- **Template** filters by questionnaire.
- **Responsible** filters by Supervisor. **In Supervisor mode, filters by Interviewers.*
- **Status** filters by status of questionnaires. Statuses include:
 - Approved by HQ, Approved by Super, Completed, Interviewers Assigned, Rejected by HQ, Rejected by Super, Super Assigned.

HQ and Super – Approve/Reject

Supervisor

Reports

Interviews

Interviewers

Hi, Supervisor1

Filter

Hide filter

Template

Any

Responsible

Any

Status

Any

Interviews

Assign interviewer

Approve

Reject

Search

Supervisor

Reports

Interviews

Interviewers

Hi, Supervisor1

Groups

Hide groups

CENSUS_Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test

New Chapter

SECTION ID: IDENTIFICATION

Interview Details

SECTION 1: PERSONAL BACKGROUND

CENSUS_Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test

Status: Completed

Responsible: Interviewer1

Approve

Reject

all

enabled (12)

answered (12)

unanswered (0)

invalid (0)

commented (0)

flagged (0)

supervisor's (0)

New Chapter

SECTION ID: IDENTIFICATION

Geo ref

latitude: 41.88168
longitude: 12.48797
accuracy: 27
altitude: 0

Write a comment...

This information is not part of the questionnaire. Enumerators should fill this section out directly after the interview.

ID1: Region:

Njombe

☒ Iringa

Morogoro

Dodoma

Write a comment...

ID2: District:

Ludewa

☒ Kilolo

Mtanga

Write a comment...

HQ and Super – Approve/Reject

Supervisor

Reports

Interviews

Interviewers

Hi, Supervisor1

Groups

Hide groups

CENSUS_Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test

New Chapter

SECTION ID: IDENTIFICATION

Interview Details

SECTION 1: PERSONAL BACKGROUND

CENSUS_Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test

Status: Completed Responsible: Interviewer1

Approve Reject all enabled (12) answered (12) unanswered (0) invalid (0) commented (0) flagged (0) supervisor's (0)

New Chapter

SECTION ID: IDENTIFICATION

Geo ref

latitude: 41.88168
longitude: 12.48797
accuracy: 27
altitude: 0

Write a comment...

This information is not part of the questionnaire. Enumerators should fill this section out directly after the interview.

ID1. Region:

Njombe

☒ Iringa

Morogoro

Dodoma

Write a comment...

ID2. District:

Ludewa

☒ Kilolo

Ulanga

Mpwapwa

Write a comment...

ID3. Name of Responsible District Veterinary Officer:

Paul Gasol

Write a comment...

Interview Details

Language of Interview

Swahili

☒ English

Write a comment...

- Approve/Reject interviews
- Write comments
- Flag
- Navigation between chapters

HQ and Super – Approve/Reject

Supervisor Reports Interviews Interviewers Hi, Supervisor1

Filter Hide filter

Template Any

Responsible Any

Status Any

Interviews

Assign interviewer Interviewer1

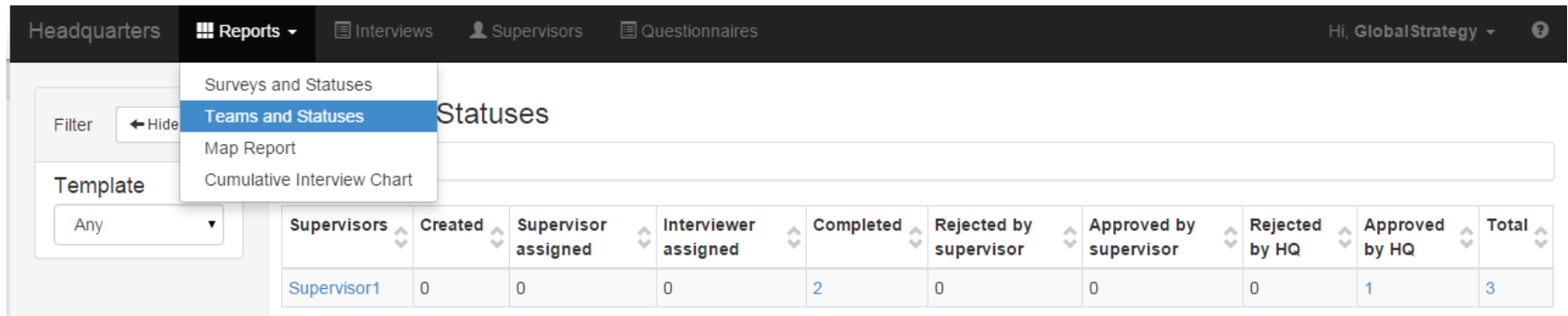
Approve Reject Search

	Responsible	Last Update	Has Errors	Status	Created on Client	
<input type="checkbox"/> Pre-filled Questions						
<input type="checkbox"/>	Interviewer1	3/19/2015		Completed	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Interviewer1	3/19/2015		Completed	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> ID3. Name of Responsible District Veterinary Officer::MichaelJordan	Interviewer1	3/18/2015		ApprovedByHeadquarters	<input type="checkbox"/>	

- 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.



The screenshot shows a web application interface with a dark header bar. The header contains navigation links: 'Headquarters', 'Reports' (with a dropdown arrow), 'Interviews', 'Supervisors', and 'Questionnaires'. On the right side of the header, it says 'Hi, GlobalStrategy' followed by a user icon. Below the header, there is a sidebar on the left with a 'Filter' section (containing a 'Hide' button) and a 'Template' section (with a dropdown menu showing 'Any'). The main content area displays a dropdown menu for 'Reports' with options: 'Surveys and Statuses', 'Teams and Statuses' (highlighted in blue), 'Map Report', and 'Cumulative Interview Chart'. To the right of the dropdown, the word 'Statuses' is visible. Below this, there is a table with 10 columns: 'Supervisors', 'Created', 'Supervisor assigned', 'Interviewer assigned', 'Completed', 'Rejected by supervisor', 'Approved by supervisor', 'Rejected by HQ', 'Approved by HQ', and 'Total'. The table has one data row for 'Supervisor1' with values: 0, 0, 0, 2, 0, 0, 0, 1, 3.

Supervisors	Created	Supervisor assigned	Interviewer assigned	Completed	Rejected by supervisor	Approved by supervisor	Rejected by HQ	Approved by HQ	Total
Supervisor1	0	0	0	2	0	0	0	1	3

- Notably, Supervisors can only create **Survey and Statuses** and **Team and Statuses** reports.

Headquarters/Super - Reports

Headquarters

Reports

Interviews

Supervisors

Questionnaires

Hi, GlobalStrategy

Filter

Hide filter

Supervisors

Any

Surveys and Statuses

Survey Name	Created	Supervisor assigned	Interviewer assigned	Completed	Rejected by supervisor	Approved by supervisor	Rejected by HQ	Approved by HQ	Total
Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test (ver.4)	0	0	0	0	0	0	0	1	1
CENSUS_Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test (ver.3)	0	0	0	2	0	0	0	0	2

- **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.

Headquarters/Super - Reports

Headquarters

Reports

Interviews

Supervisors

Questionnaires

Hi, GlobalStrategy

Filter

Hide filter

Template

Any

Teams and Statuses

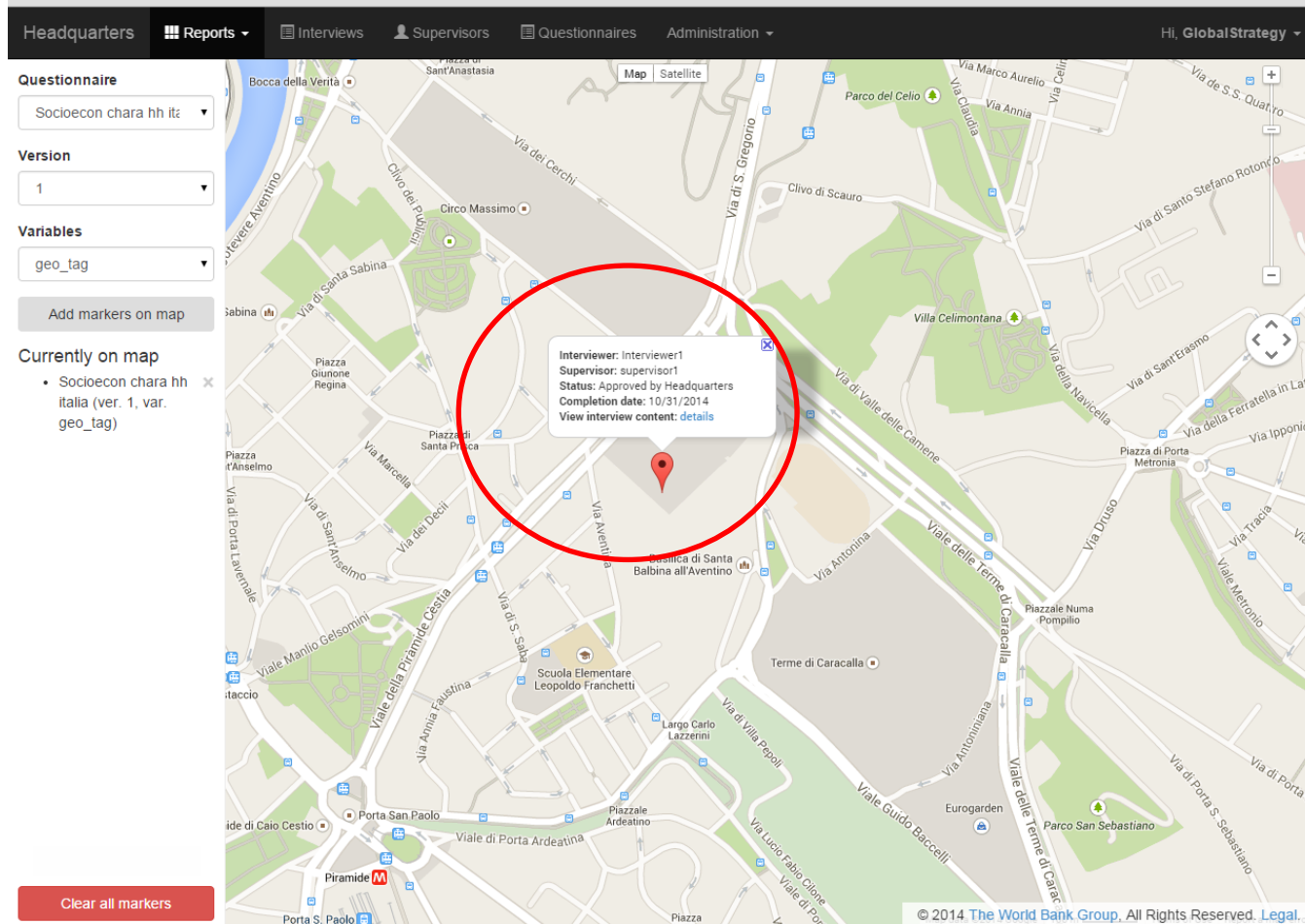
Supervisors	Created	Supervisor assigned	Interviewer assigned	Completed	Rejected by supervisor	Approved by supervisor	Rejected by HQ	Approved by HQ	Total
Supervisor1	0	0	0	2	0	0	0	1	3

- **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/Interviewer 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

The screenshot displays the 'Headquarters ONLY reports' interface. The top navigation bar includes 'Headquarters', 'Reports', 'Interviews', 'Supervisors', 'Questionnaires', and 'Administration'. The 'Reports' section is active, showing a sidebar with filters for 'Questionnaire', 'Version', and 'Variables'. The 'Questionnaire' filter is set to 'Socioecon chara hh it', 'Version' is set to '1', and 'Variables' is set to 'geo_tag'. A red circle highlights these filter options. The main area shows a map of Rome with a red pin marking a location. A tooltip for the pin displays the following information: 'Interviewer: Interviewer1', 'Supervisor: supervisor1', 'Status: Approved by Headquarters', 'Completion date: 10/31/2014', and a link to 'View interview content: details'. The bottom left of the map has a 'Clear all markers' button. The bottom right of the map shows the copyright notice: '© 2014 The World Bank Group. All Rights Reserved. Legal.'.

Headquarters ONLY reports

Questionnaire
Socioecon chara hh it

Version
1

Variables
geo_tag

Currently on map

- Socioecon chara hh it (ver. 1, var. geo_tag)

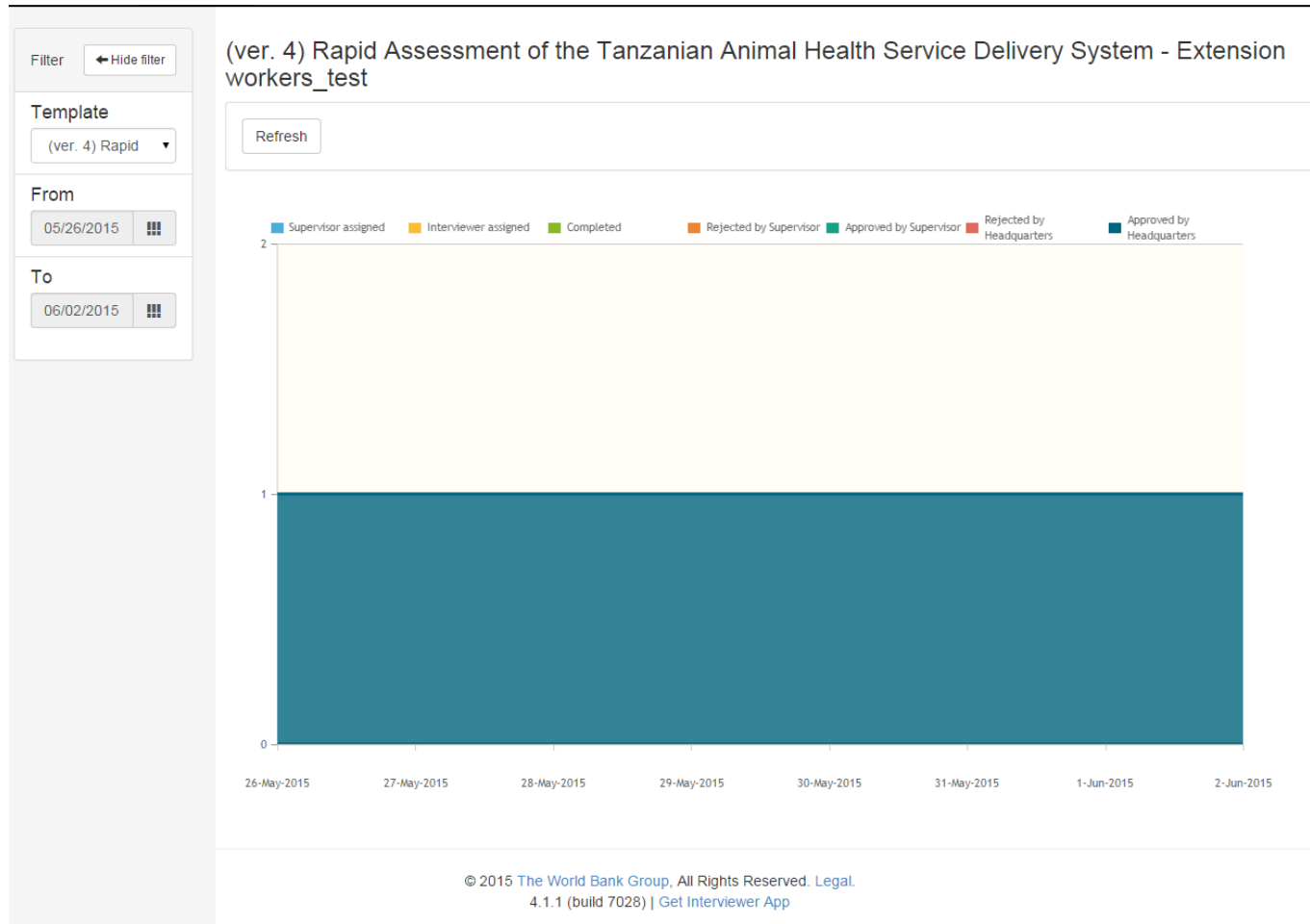
Interviewer: Interviewer1
Supervisor: supervisor1
Status: Approved by Headquarters
Completion date: 10/31/2014
[View interview content: details](#)

Clear all markers

© 2014 The World Bank Group. All Rights Reserved. Legal.

Filter by
questionnaire,
version, and
variable.

Headquarters ONLY reports



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

QUESTIONS?