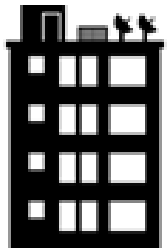
Introduction and case management with Admin/Headquarters/Supervisor



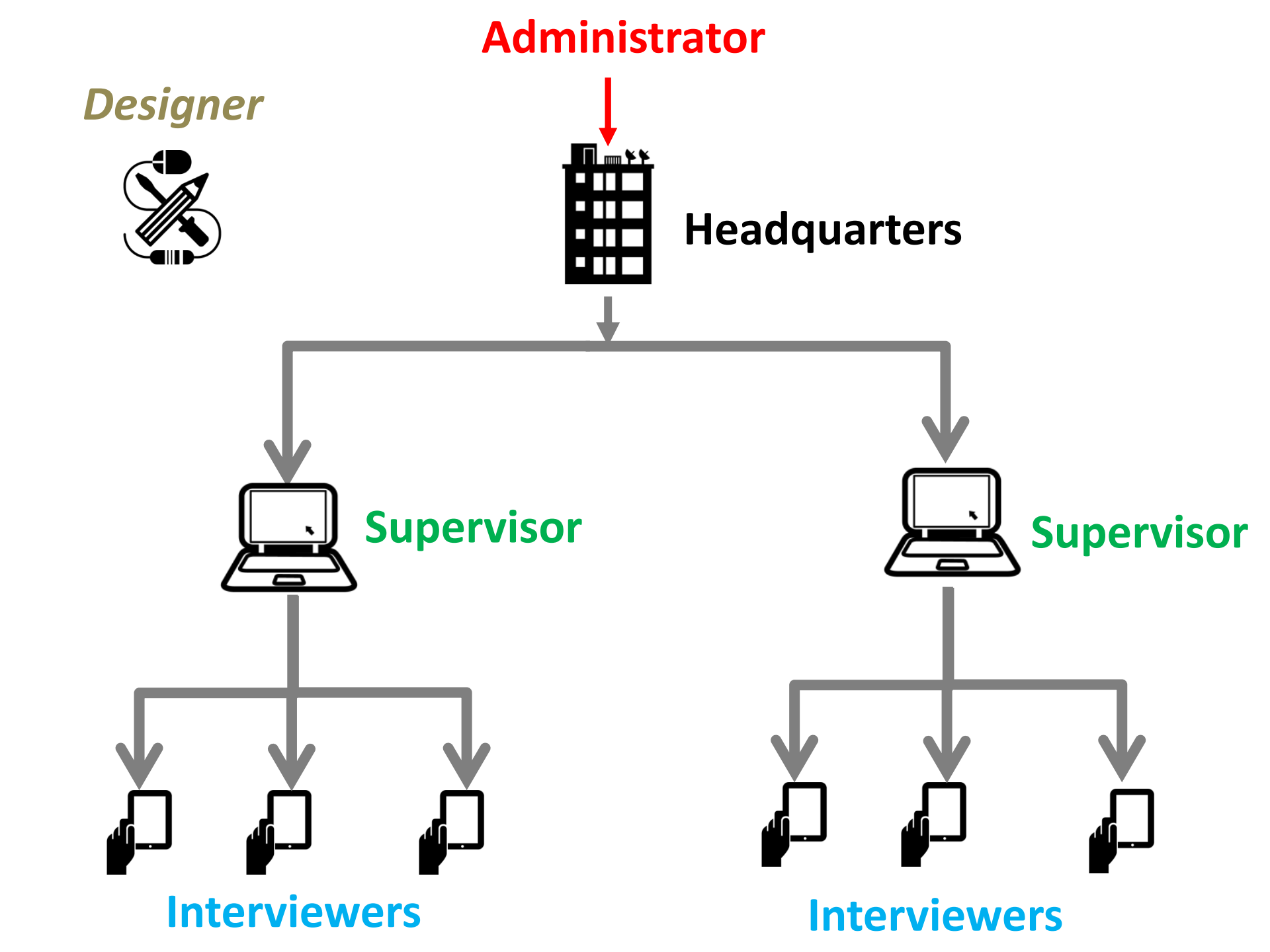
Outline

- 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

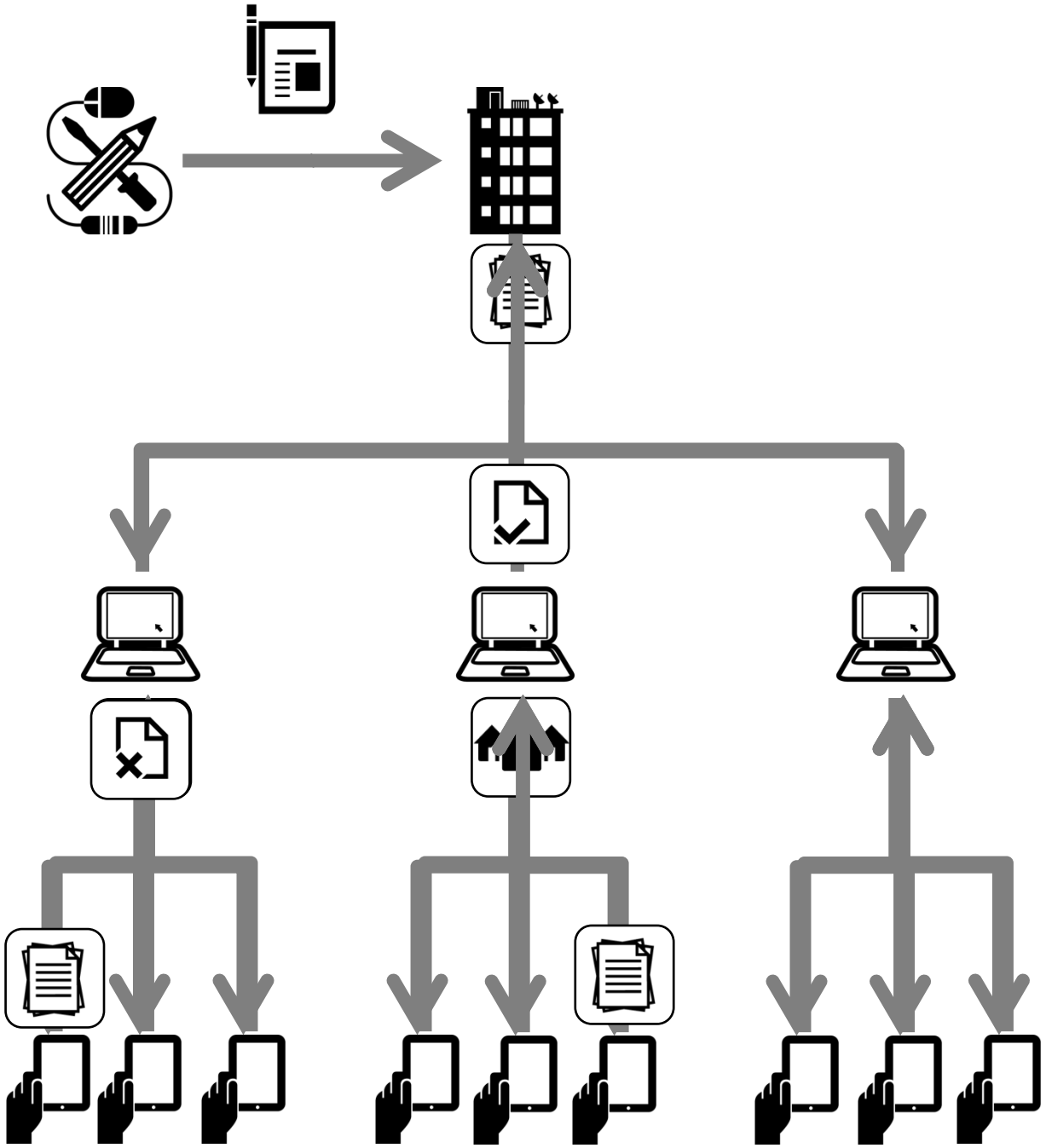
Supervisor – functions w/i SS

- 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

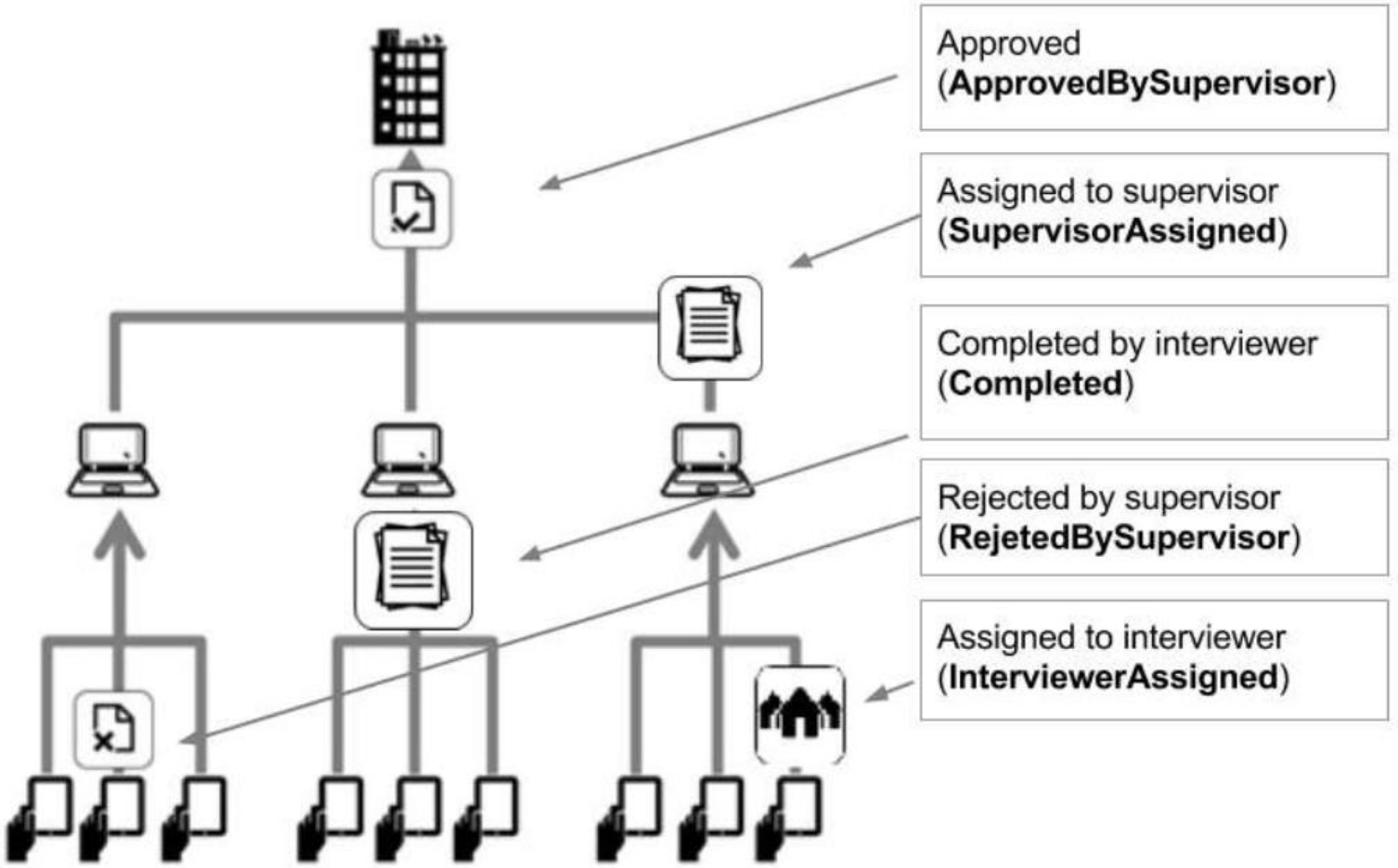
WiFi

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

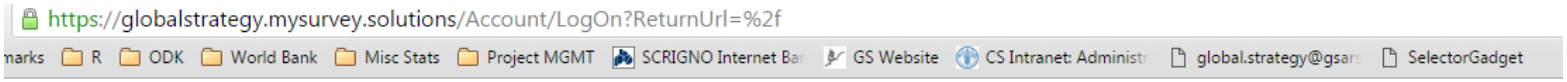
Events in the life of a case

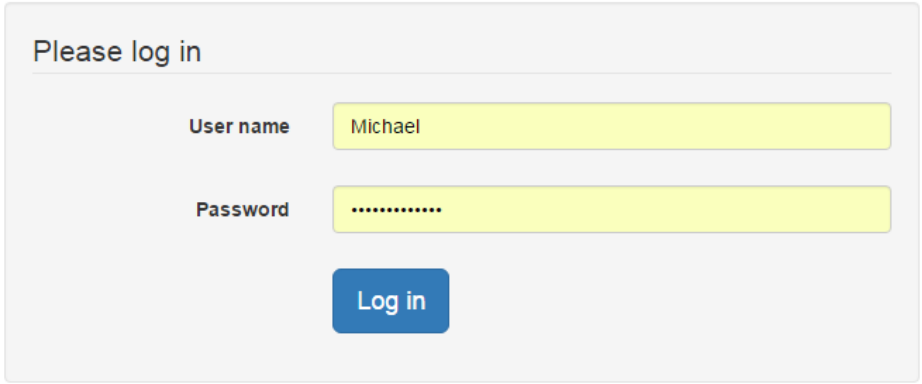


Introduction to Headquarters and Supervisor

HQ and Super: Where to find

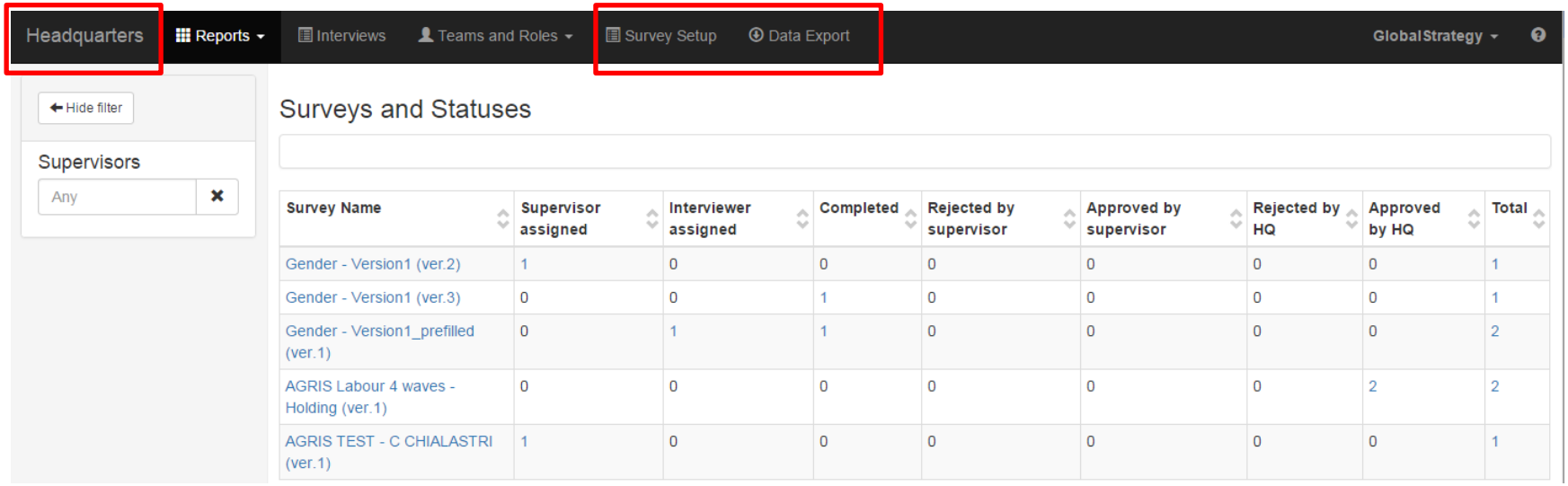
- ***[servername].***mysurvey.solutions





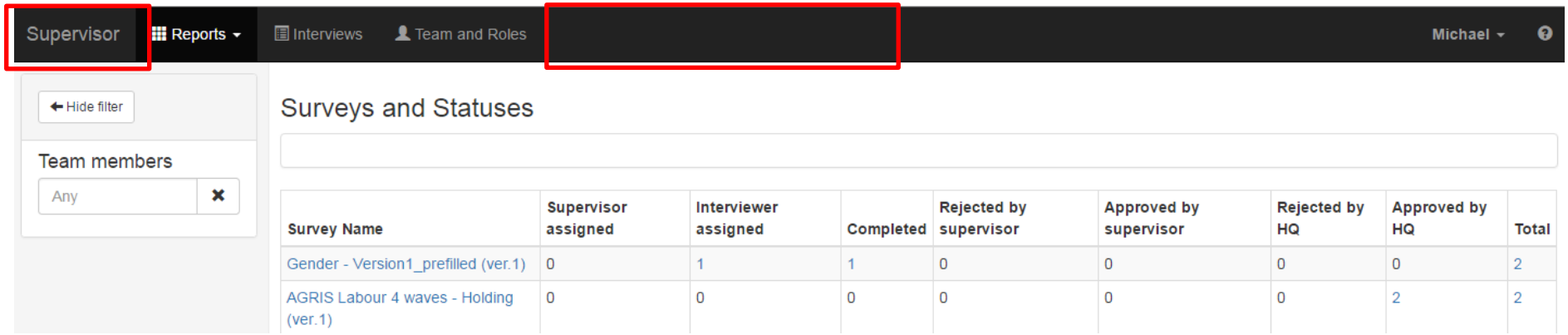
- Same URL for HQ and Super
- Login using Super credentials or HQ credentials

HQ Dashboard



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

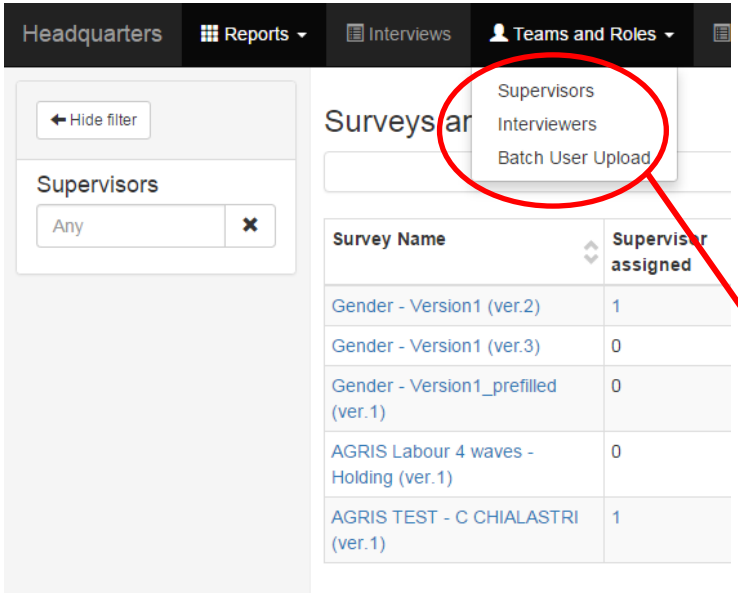
Supervisor Dashboard

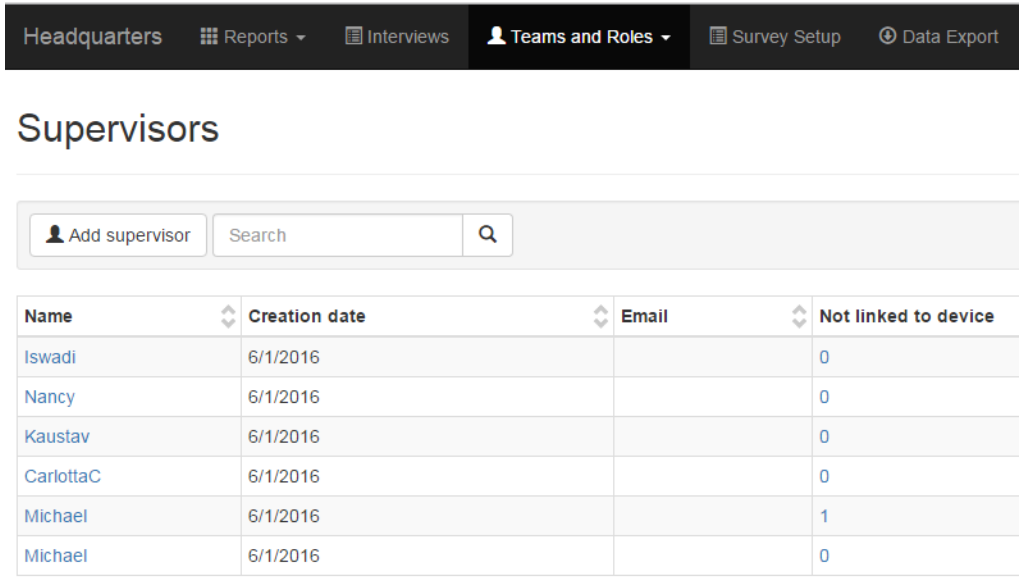


Headquarters primary functions in SuSo

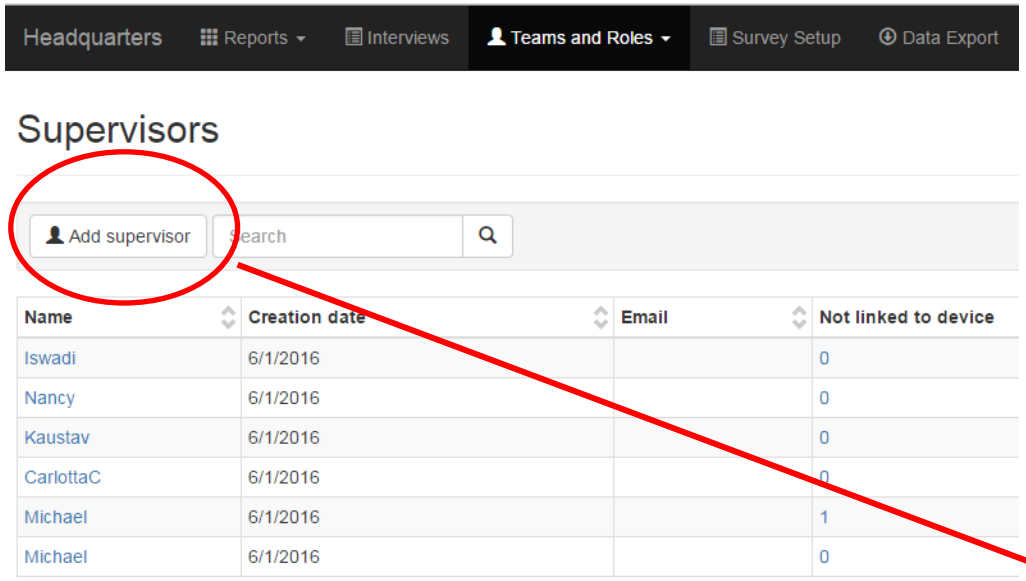
- Create Supervisors
- Create Interviewers and assign to Supervisor
- Import template
- Create Sample
- Assign cases
- Approve completed cases

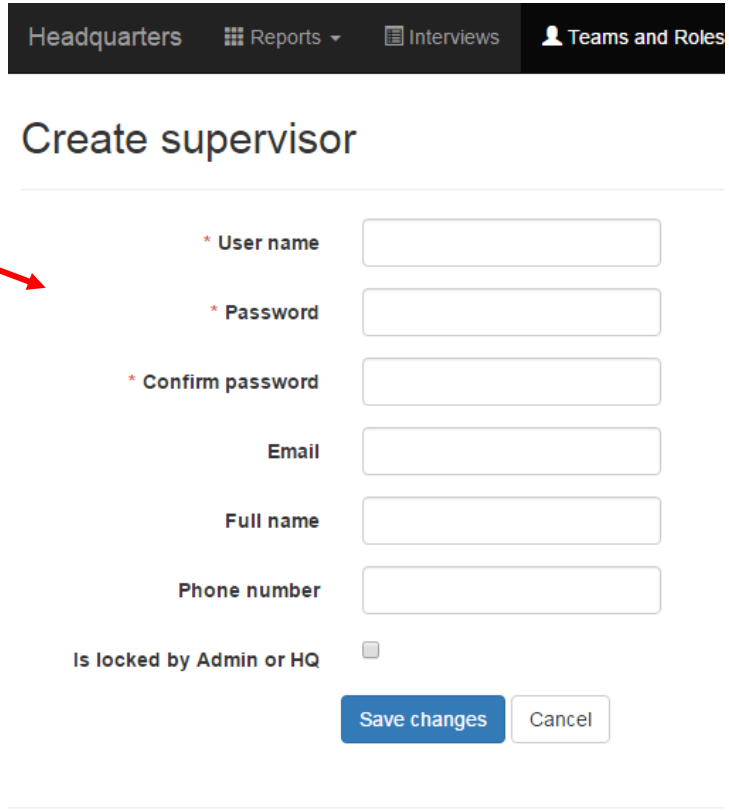
Headquarters – Create Supervisor





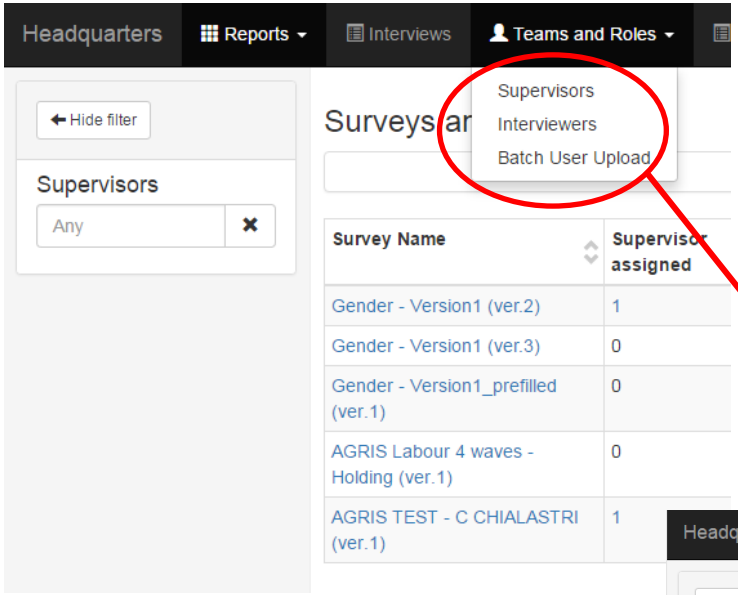
Headquarters – Create Supervisor

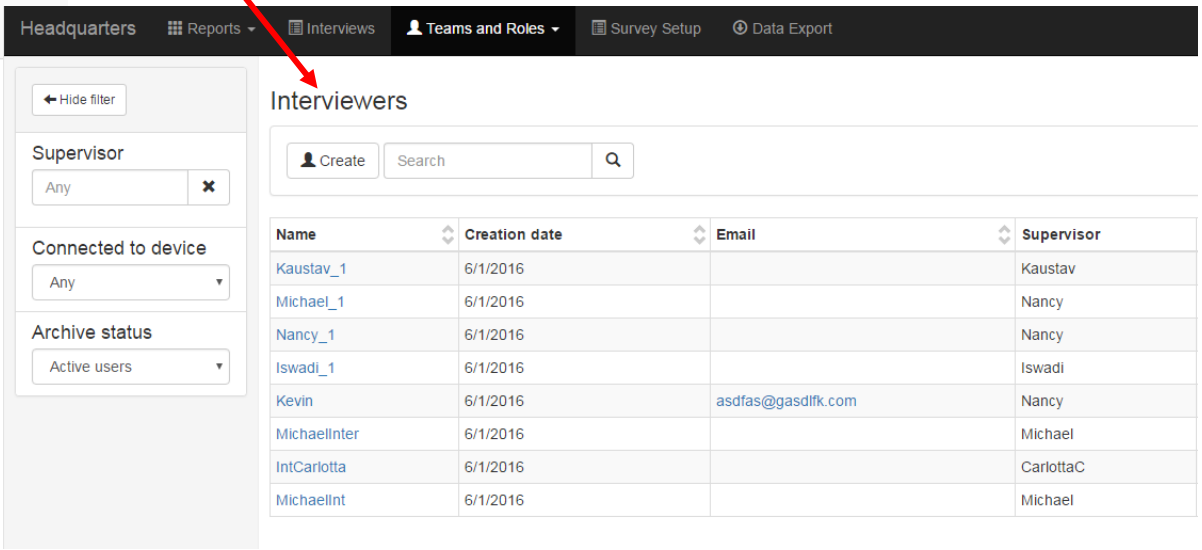




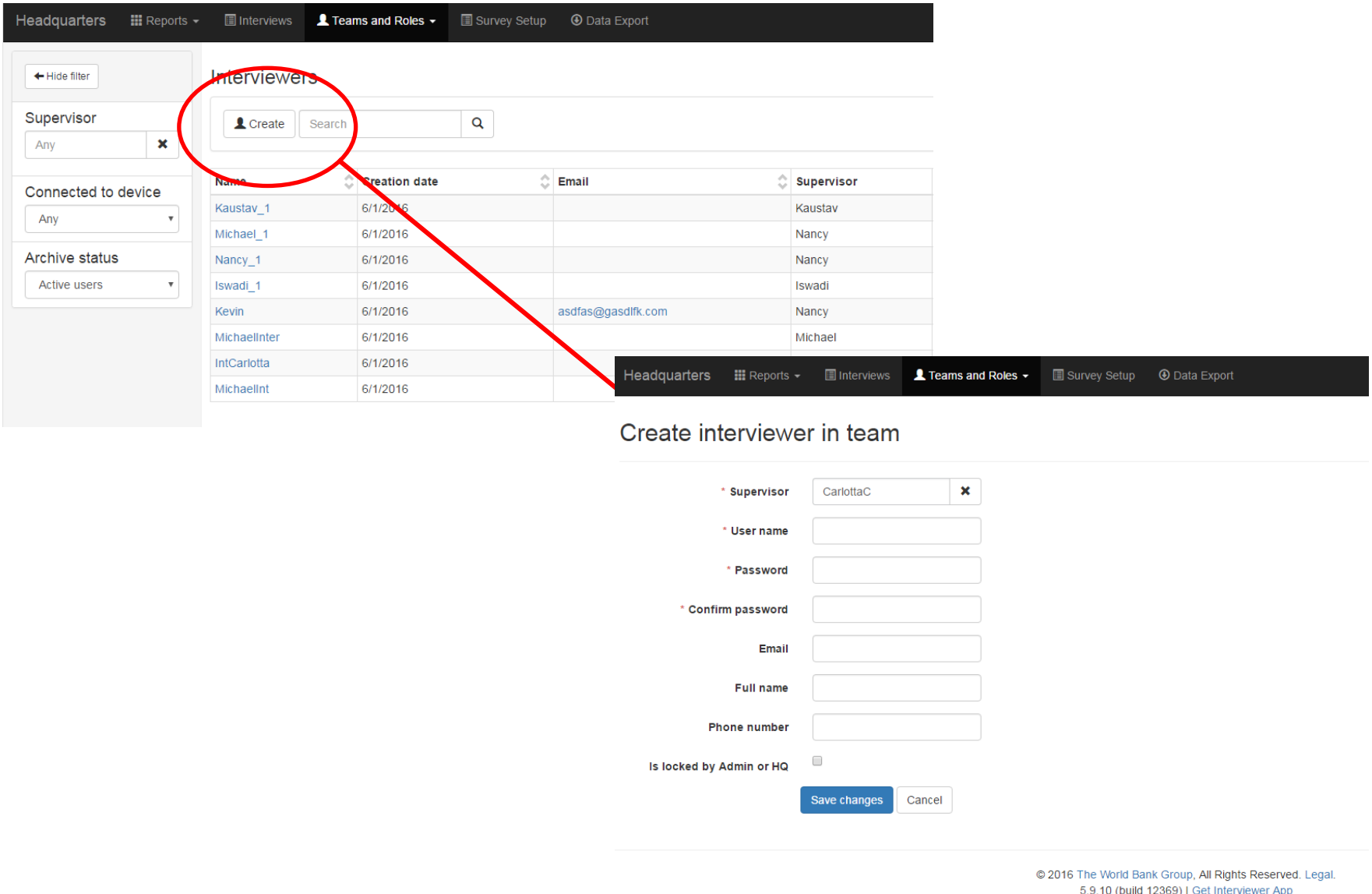
- **Add supervisor** allows HQ to create a login for each supervisor.
- **Is locked** blocks the supervisor/interviewer from accessing the server.

Headquarters – Create Interviewer





Headquarters – Create Interviewer



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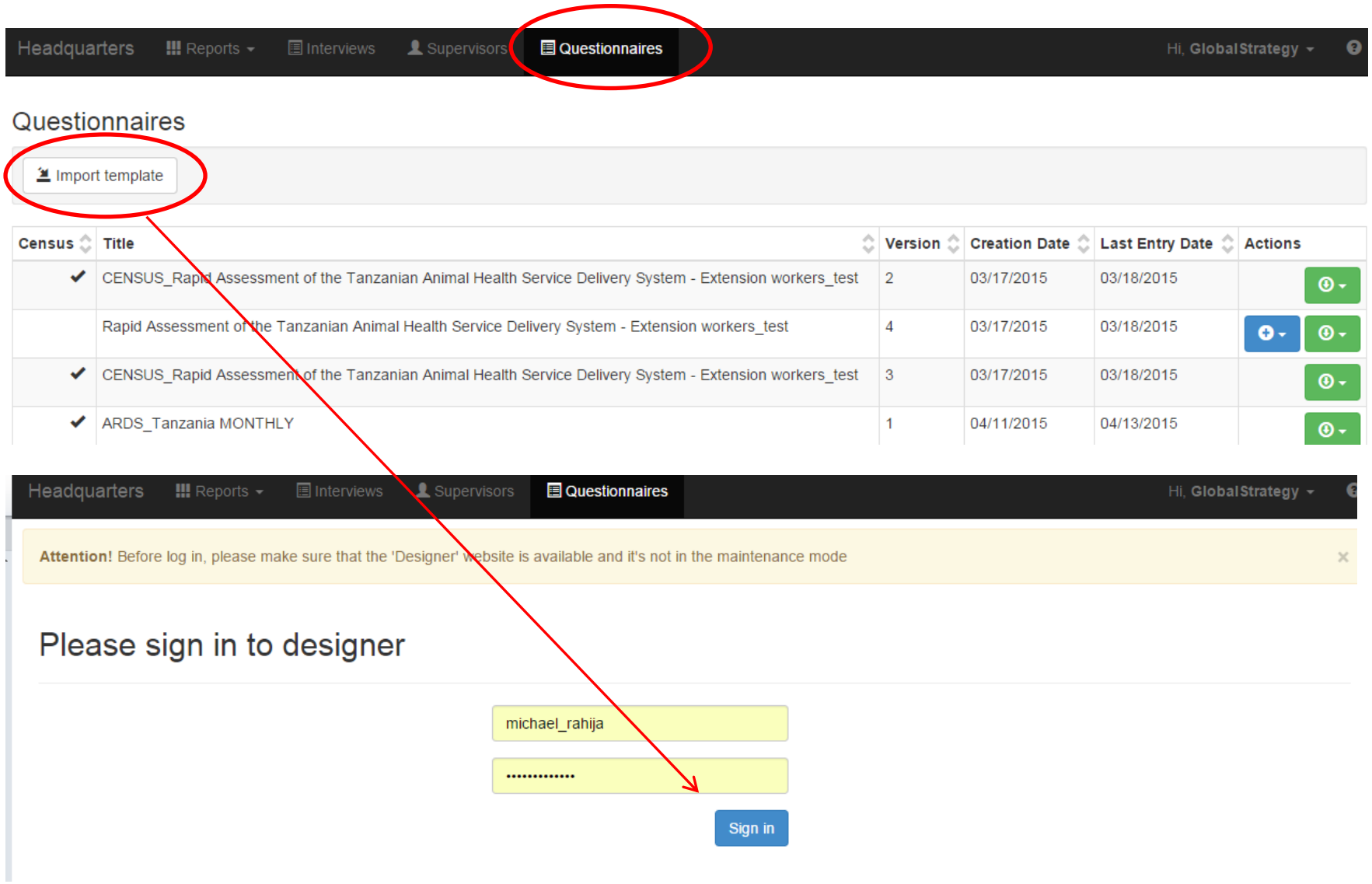
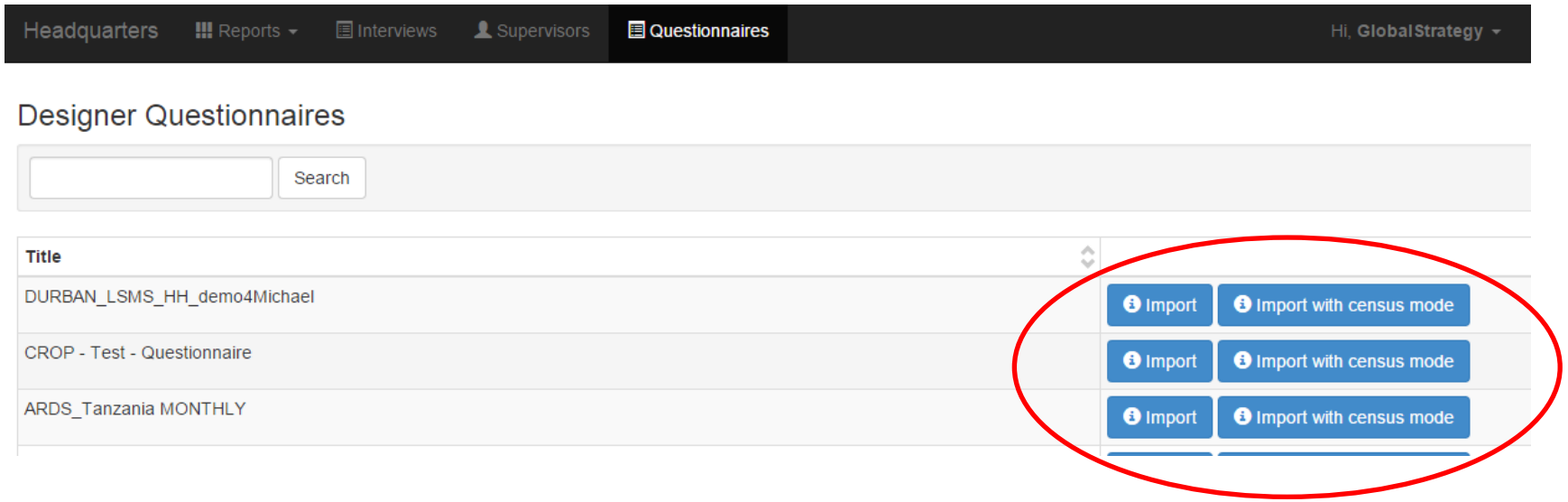
5.9.10 (build 12369) | Get Interviewer App

Headquarters – Import Template



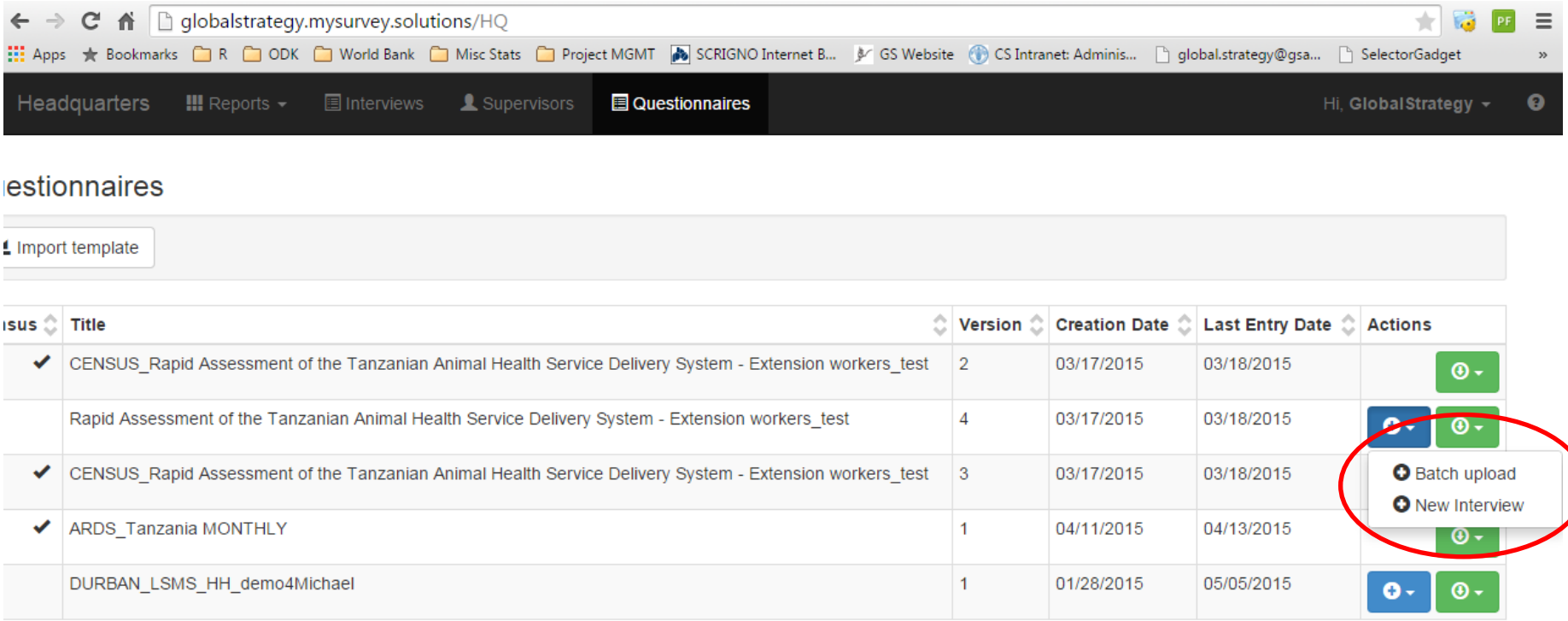
Headquarters - Import Template



- 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.

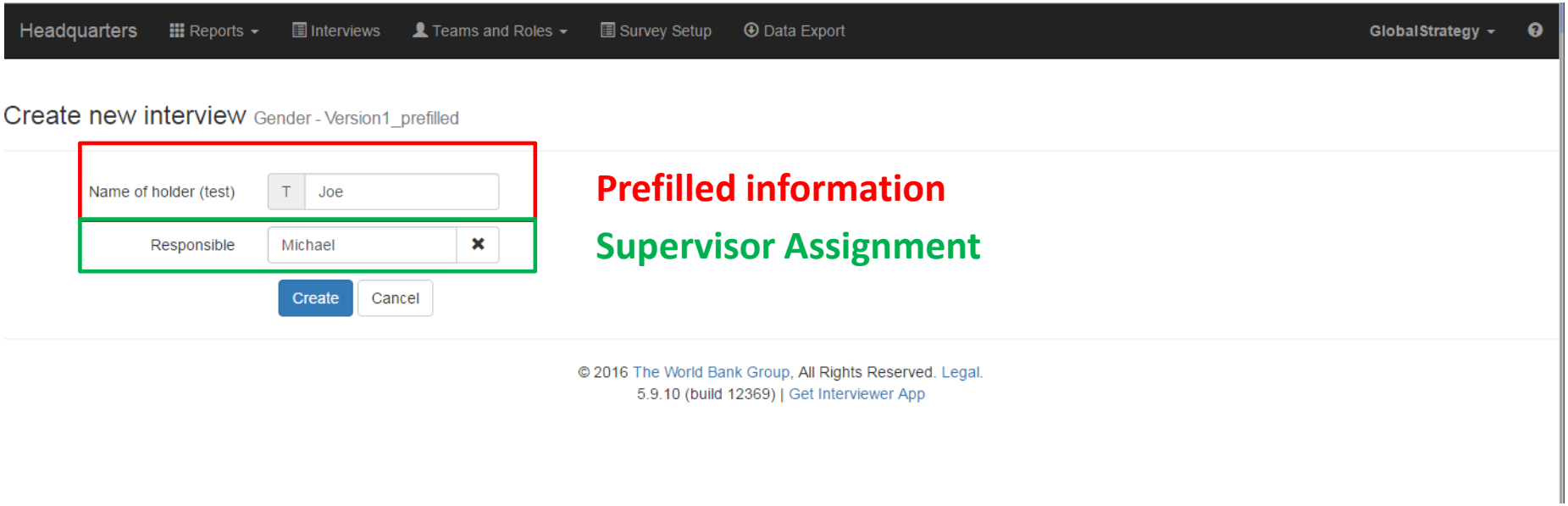
KEY CONCEPT!
Census vs. Sample Mode

Headquarters – Create Cases



- **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.

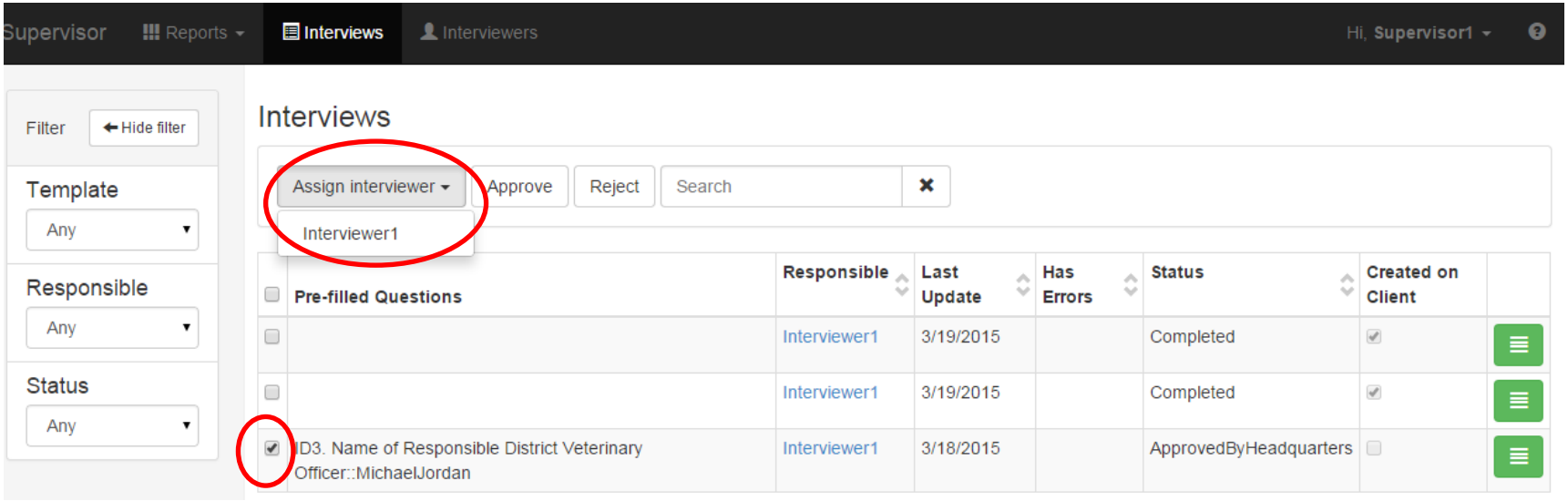
Headquarters - Create Cases



Supervisor primary functions in SuSo

- Assign cases to Interviewers

Supervisor – Assign Cases

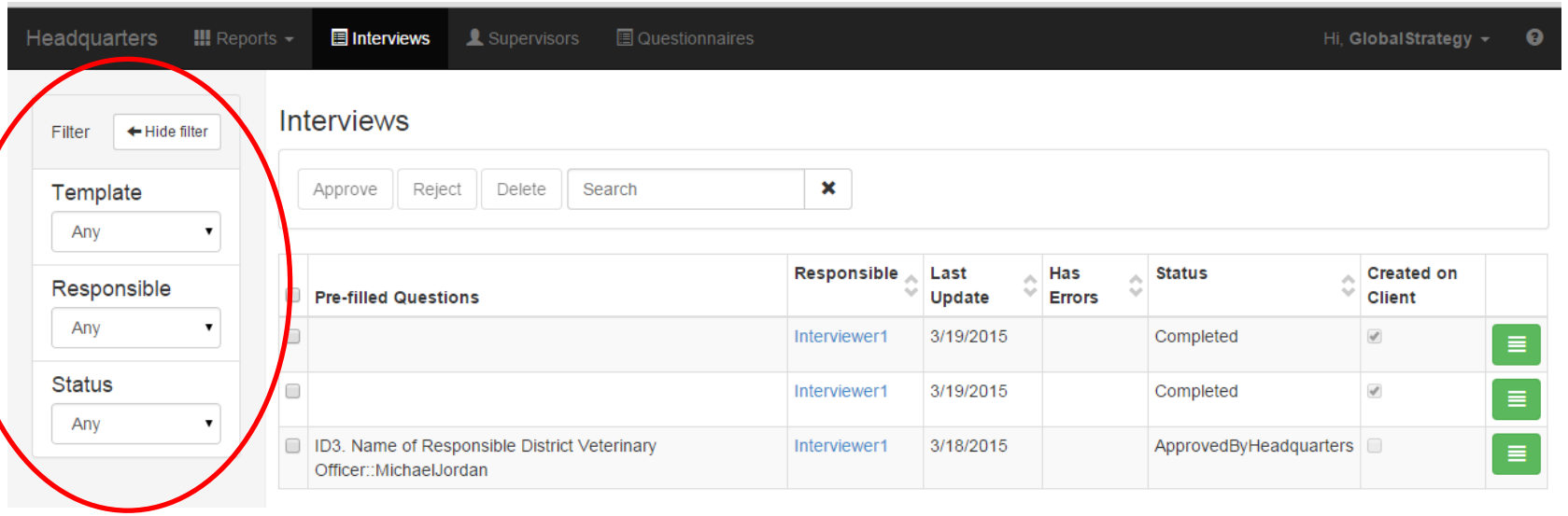


- Select an interview, and **Assign an interviewer**.
- HQ assigns cases to Supervisors and Supervisors assign cases to Interviewers.
- HQ/Supervisors **can also select multiple cases and Approve or Reject** them without visually inspecting the survey. **This should not be used as a standard practice.**

HQ and Supervisor primary responsibilities in SuSo

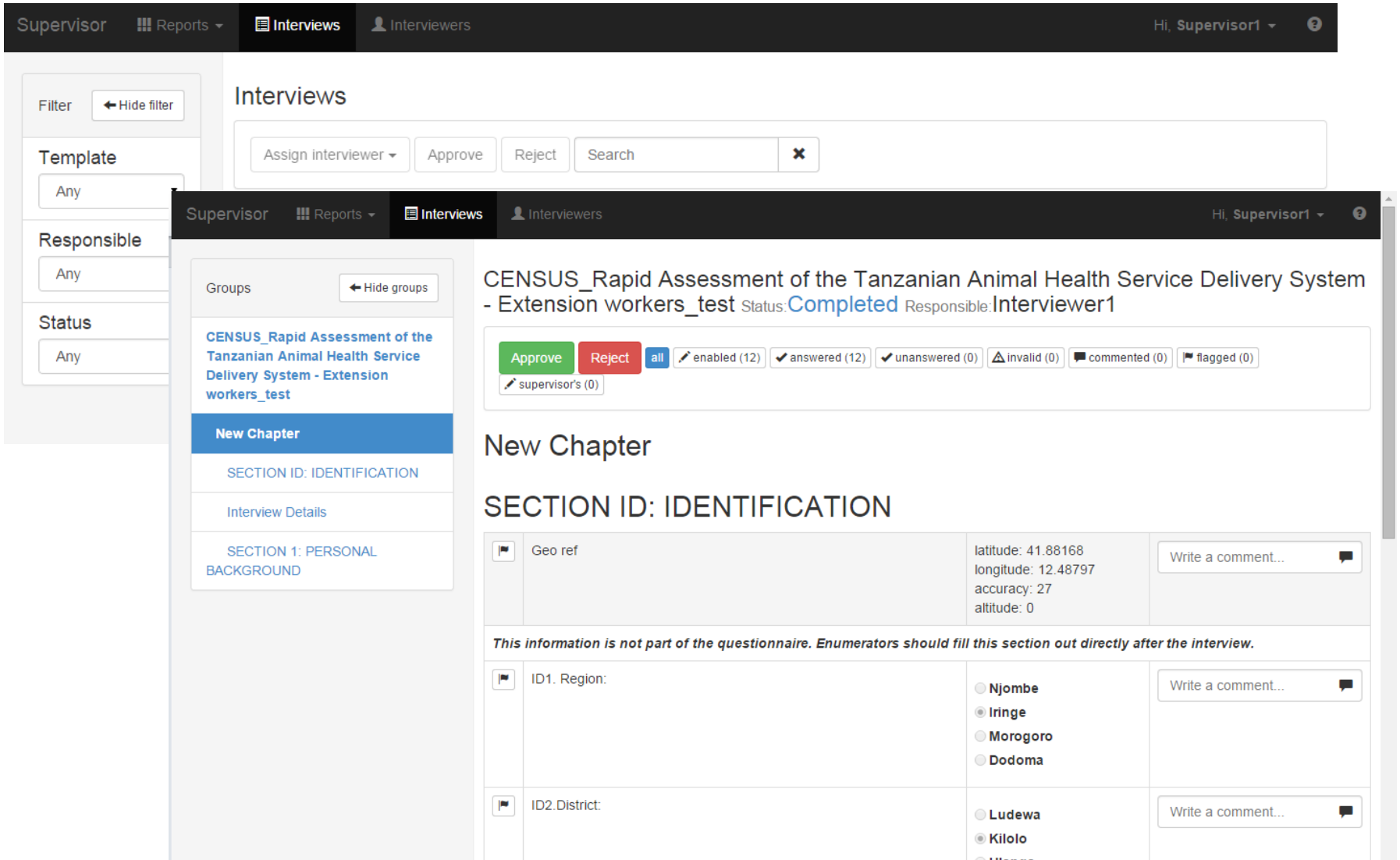
- Approve/Reject Completed Cases
- Create Reports

HQ and Super – Approve/Reject

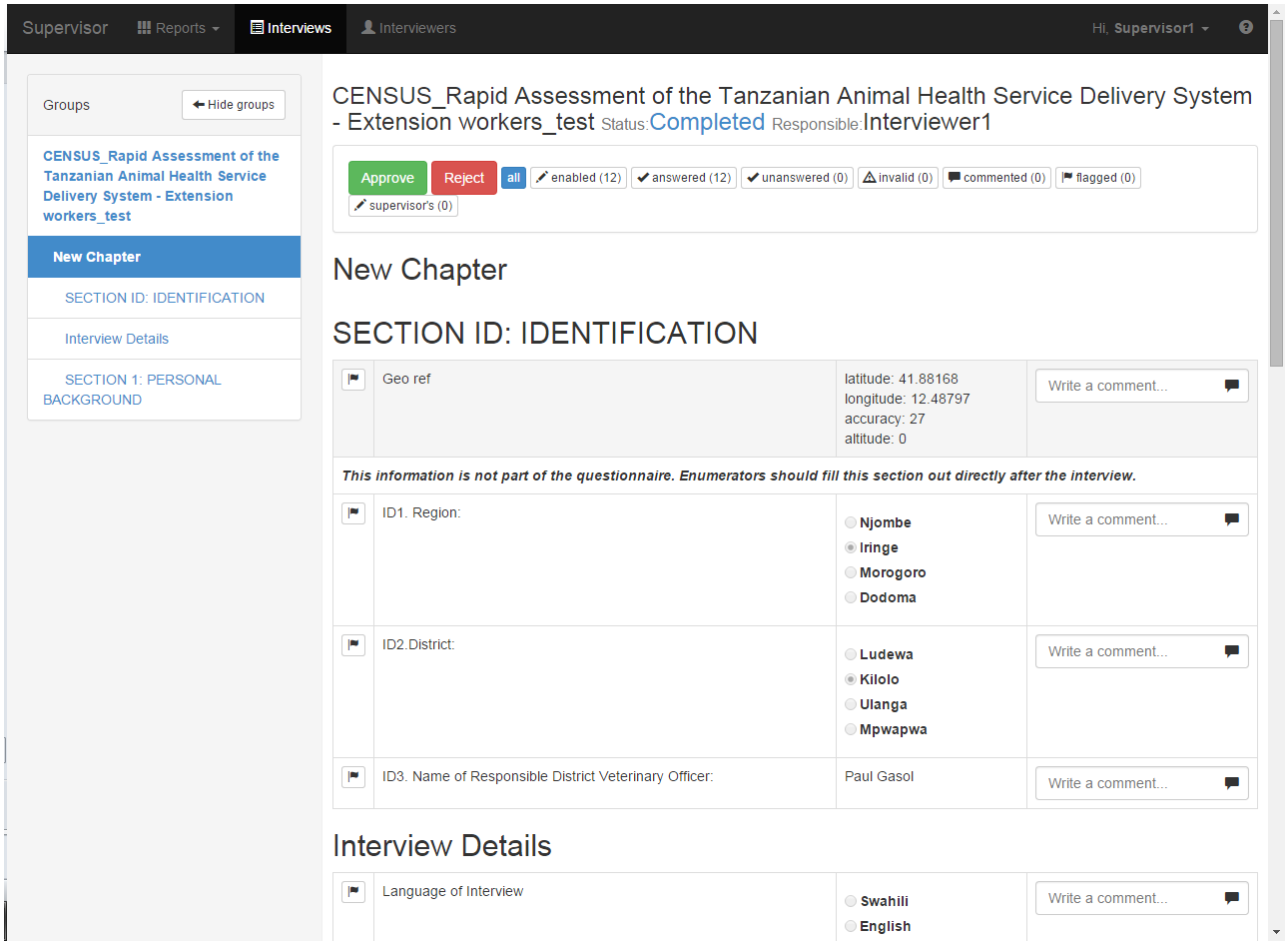


- **Template** filters by questionnaire.
- **Responsible** filters by Supervisor. **In Supervisor mode, filters by Interviewers.*
- **Status** filters by status of questionnaires. Statuses include:
  - Approved by HQ, Approved by Super, Completed, Interviewers Assigned, Rejected by HQ, Rejected by Super,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

HQ and Super – Approve/Reject

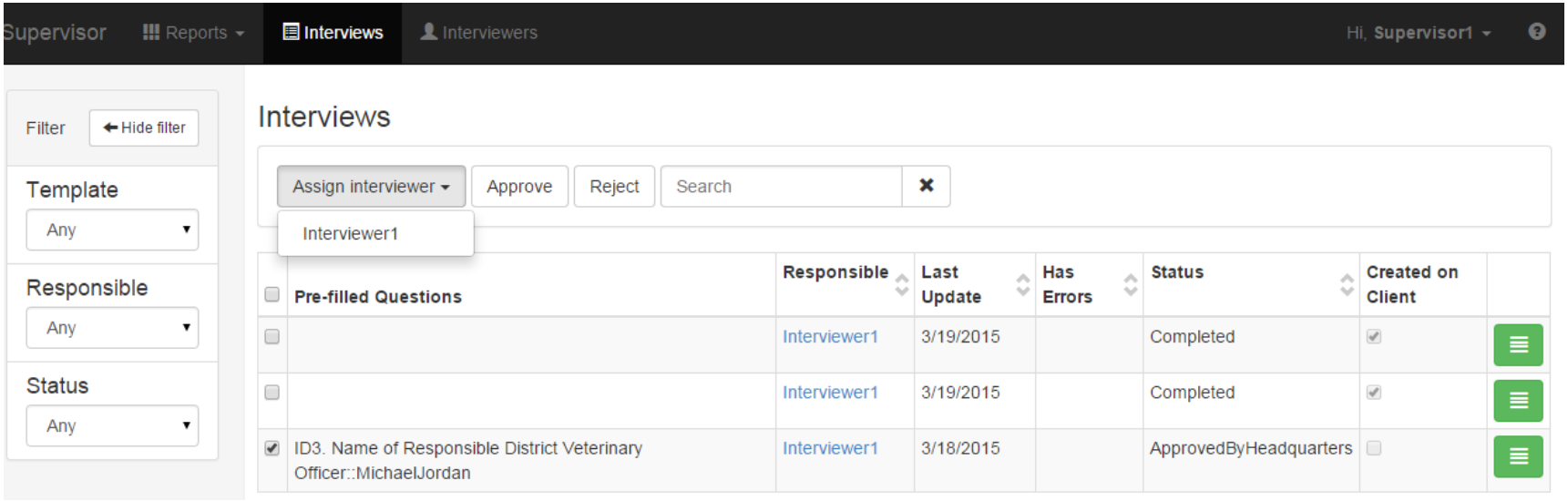


HQ and Super – Approve/Reject



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

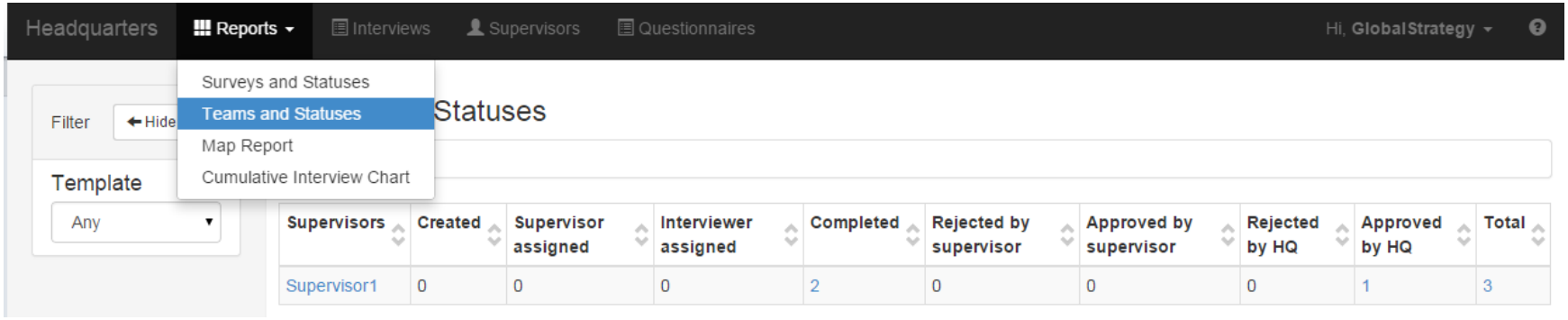
HQ and Super – Approve/Reject



- 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.**

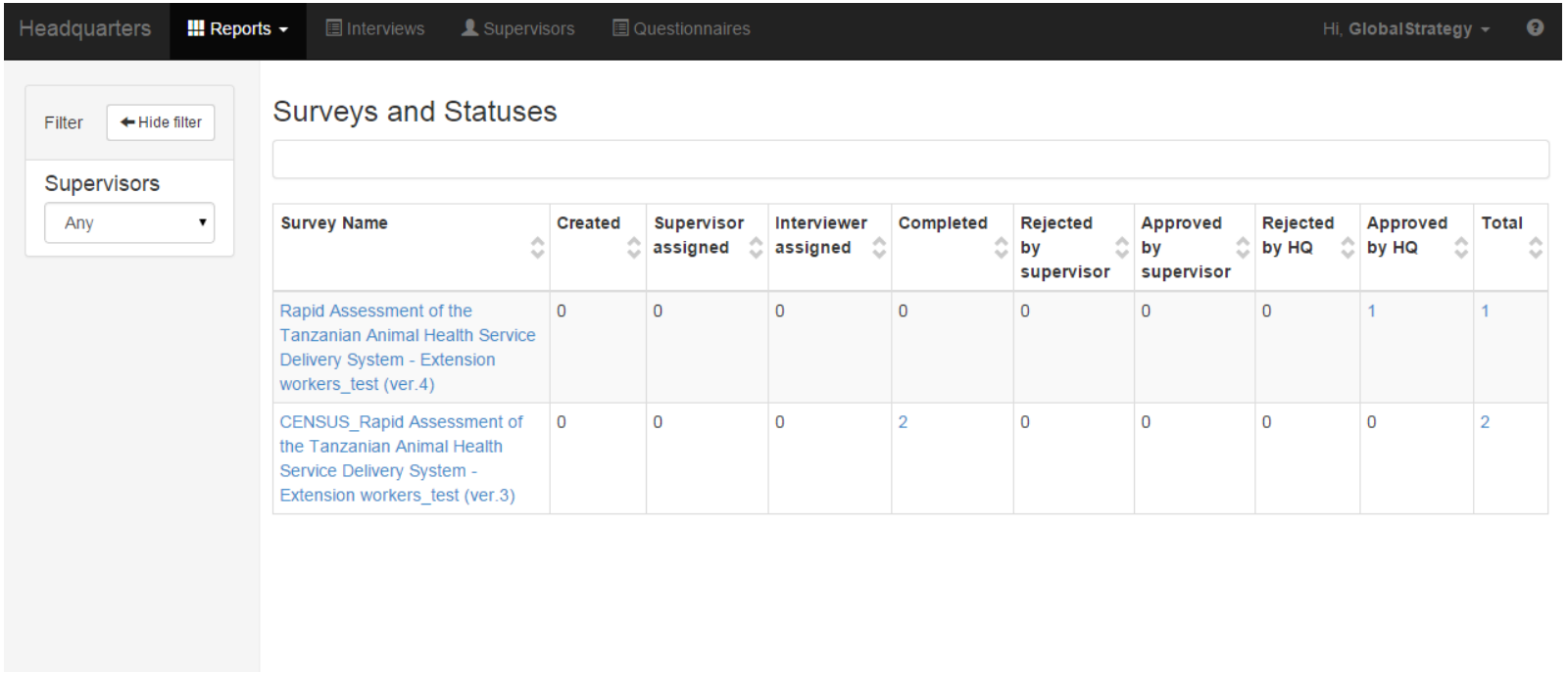
HQ and Super – Reports

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



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

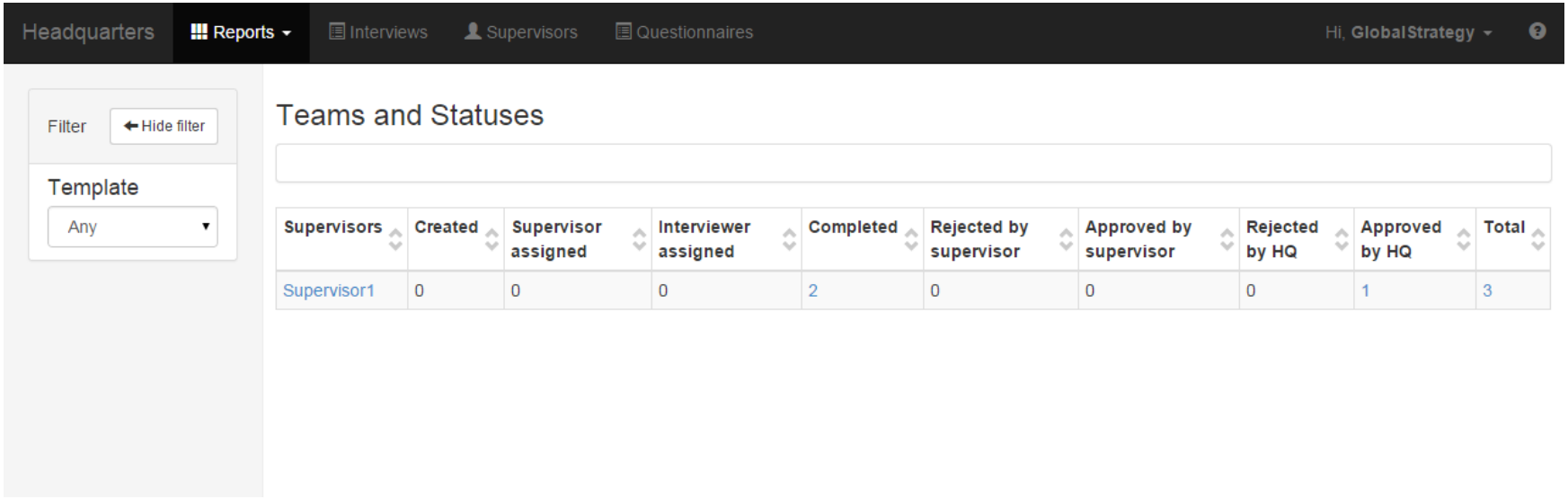
Headquarters/Super - Reports



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

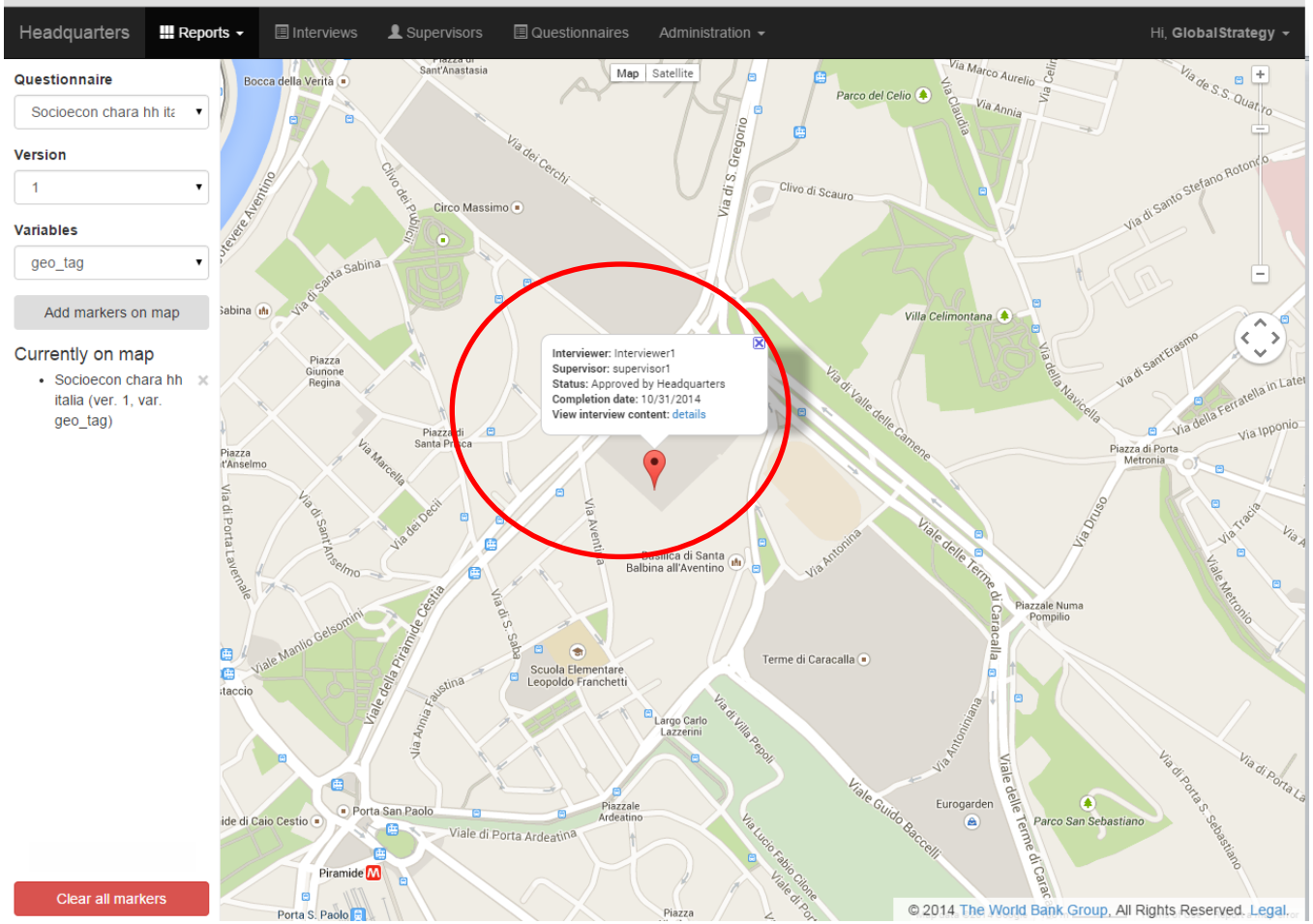


- **Teams and Statuses** tabulates each Supervisor/Interviewers as rows, and the columns are the case statuses. Accordingly, the contents of the table are the frequencies of each questionnaire assigned to the respective Supervisor/Intervierwer with the corresponding status.

Headquarters ONLY reports

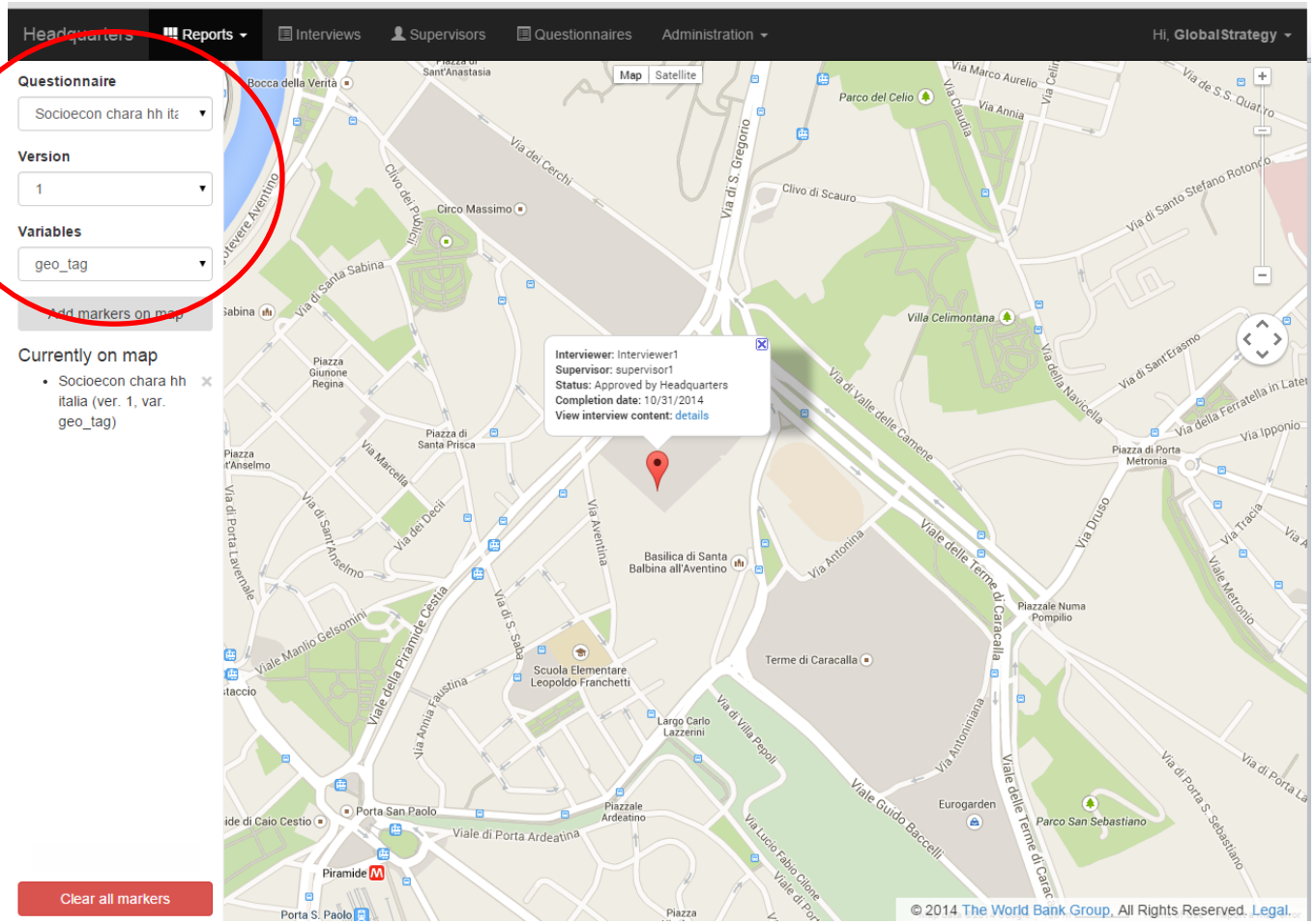
- The Map Report and Cumulative Interview Chart report are only available in Headquarters mode. I honestly don’t know why this feature isn’t allowed at the Supervisor level to monitor interviews.

Headquarters ONLY reports



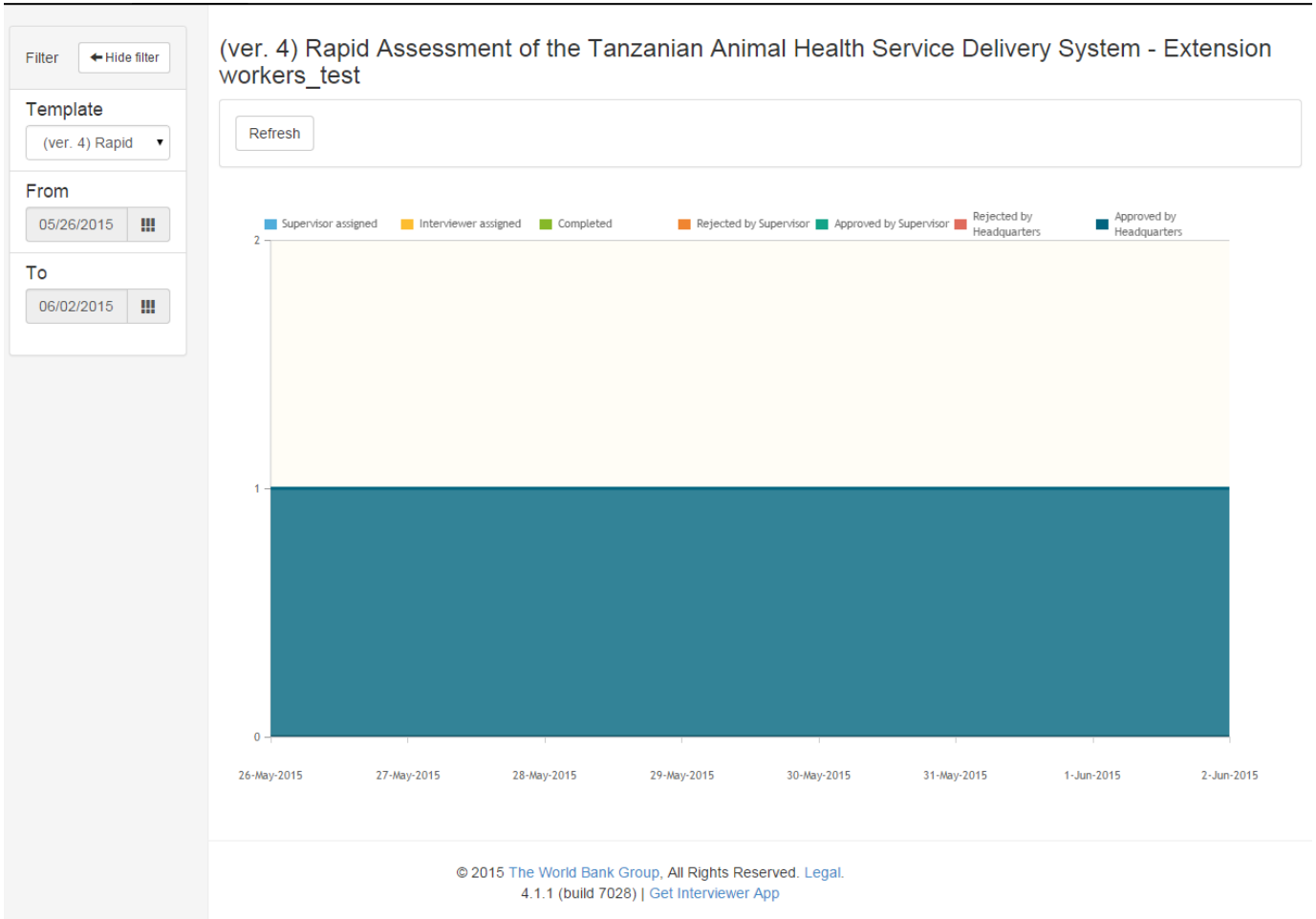
If there is GEO question, then the map report plots the point on a google map and shows metadata about the interview. Notably, clicking details will take you to the completed questionnaire.

Headquarters ONLY reports



Filter by questionnaire, version, and variable.

Headquarters ONLY reports



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

QUESTIONS?