

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 the context of this training, 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.**

What is a “case”?

Blank Questionnaire

2017 Agricultural Survey
1. Holder: _____
2. Age of holder: _____
3. Number of plots: _____
.
.
.
.
.
.
n.

Case

2017 Agricultural Survey
1. Holder: *Farmer Joe* _____
2. Age of holder: _____
3. Number of plots: _____
.
.
.
.
.
.
n.

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**



Events recorded

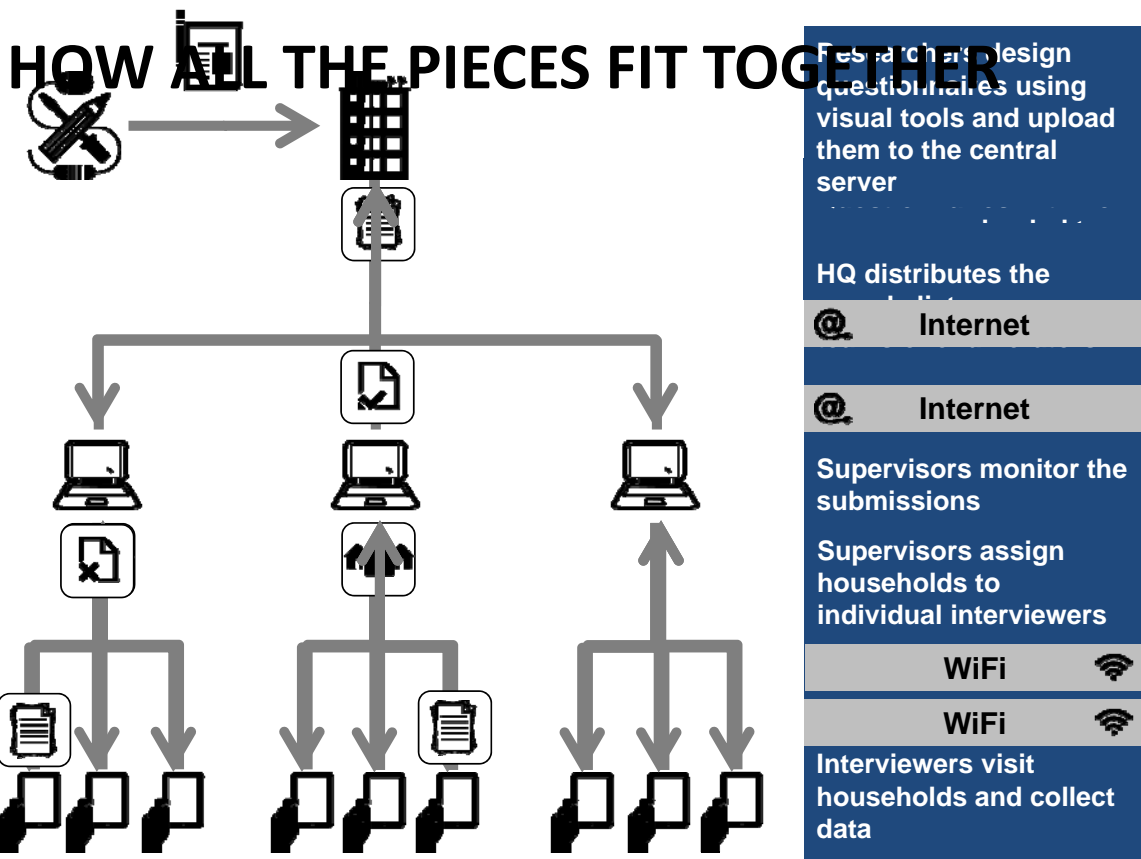


- **Data Export**



OR





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

The screenshot displays the Designer interface for a questionnaire titled "DRAFT2 Tanzania NPS 2013/2014 Household Questionnaire (5720, 300, 300)". The interface is divided into several sections:

- SECTION A:1 - HOUSEHOLD IDENTIFICATION**: A list of variables for data collection, including REGION, DISTRICT, WARD, VILLAGENUMERATION AREA, KITONGOR OR MTAAN NAME, HOUSEHOLD ID (FROM LIST), NAME OF HOUSEHOLD HEAD, NAME OF HOUSEHOLD HEAD FROM NPS YEAR 2, FULL HOUSEHOLD IDENTIFICATION FROM NPS YEAR 2, IS THIS HOUSEHOLD, LOCATION OF HOUSEHOLD, NAME OF TRACKING TARGET FROM NPS YEAR 2, ROSTER ID OF TRACKING TARGET FROM NPS YEAR 2, LOWEST ROSTER ID NUMBER, and DESCRIPTION OF LOCATION OF HOUSEHOLD.
- SECTION A:1 - HOUSEHOLD IDENTIFICATION (Detailed View)**: Shows configuration for the "REGION" variable. It includes fields for "Question Type" (set to "matrix"), "Variable name(s)" (set to "region"), and "Title" (set to "REGION"). It also features a "Count of Selected Places" field and an "Add restriction" section with a "Condition expression (C)" field.
- SECTION V: ANT** and **SECTION H: FOO**: Additional sections visible at the bottom of the interface.
- Navigation and Actions**: Includes buttons for "SAVE", "CANCEL", "DELETE", "CLOSE", and "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

The screenshot shows the Headquarters interface. The top navigation bar includes: Headquarters, Reports (highlighted with a red box), Interviews, Supervisors, Questionnaires, and Administration. Below this is a sub-navigation bar with: Headquarters, Reports, Interviews, Supervisors, Questionnaires, and Administration. The main content area is titled "Questionnaires" and features an "Import template" button. A table lists various questionnaires with columns for "Title", "Export Data", and "Census mode". The "Export Data" column contains "CSV" and "Delete" buttons. The "Census mode" column contains "Switch upload" and "New Interview" buttons. Below the table, there are two buttons: "RejectedByHeadquarters" and "ApprovedByHeadquarters". A table below these buttons shows a row with the following data: Region:2, Area of residence:Urban, Household address:Harvard St. 9838, Peter, 6/25/2014, SupervisorAssigned,



Supervisor

- **How used**

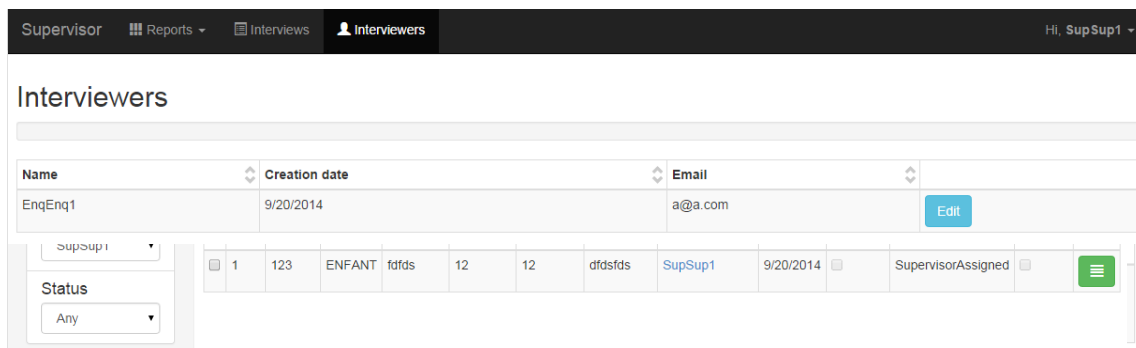
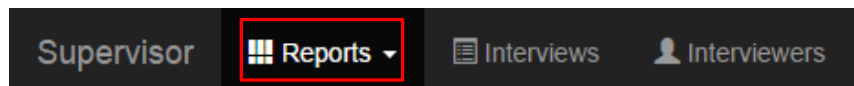
- **Manage workflow**—assign interviews to interviewers
- **Control quality**—review interviewers' work, approving or rejecting it

- **Where to find it**

- Cloud-based (online)
- Web-based (offline with synchronization to HQ)



Supervisor, in images





Interviewer

- **How used**

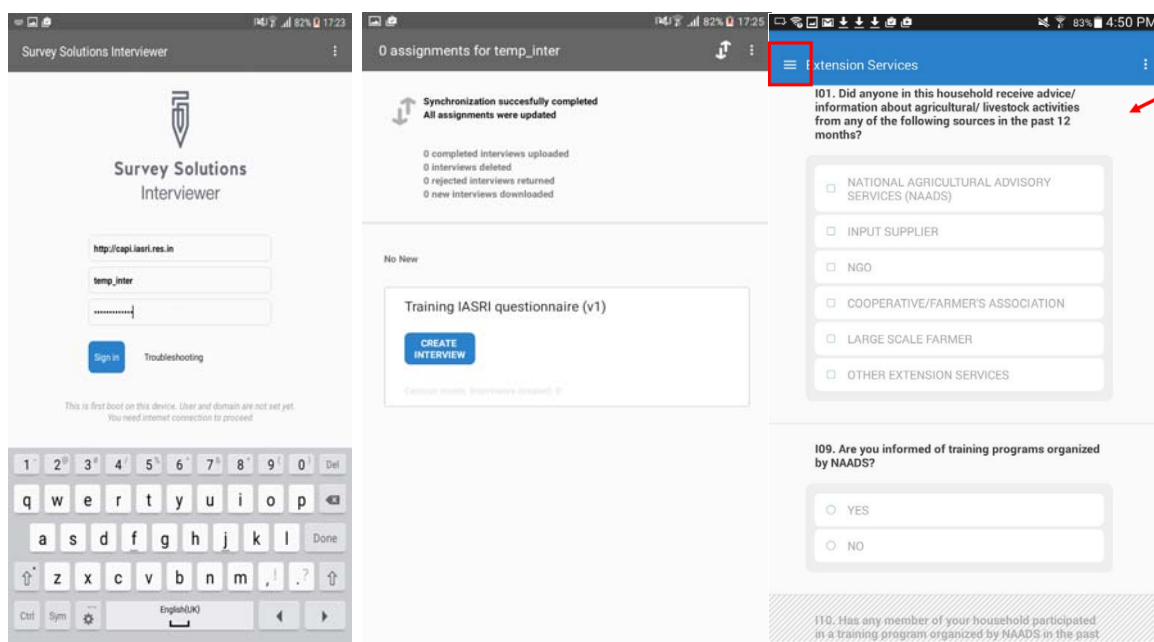
- **Receive assignments**—new questionnaires, new interviews
- **Complete assignment**—collect data, module by module
- **Submit assignment**—confirm all questions are answered, send completed assignment for review

- **Where to find it**

- Tablet



Interviewer, in images





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

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 **Set up -> Designer, and Tester**
- 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?