

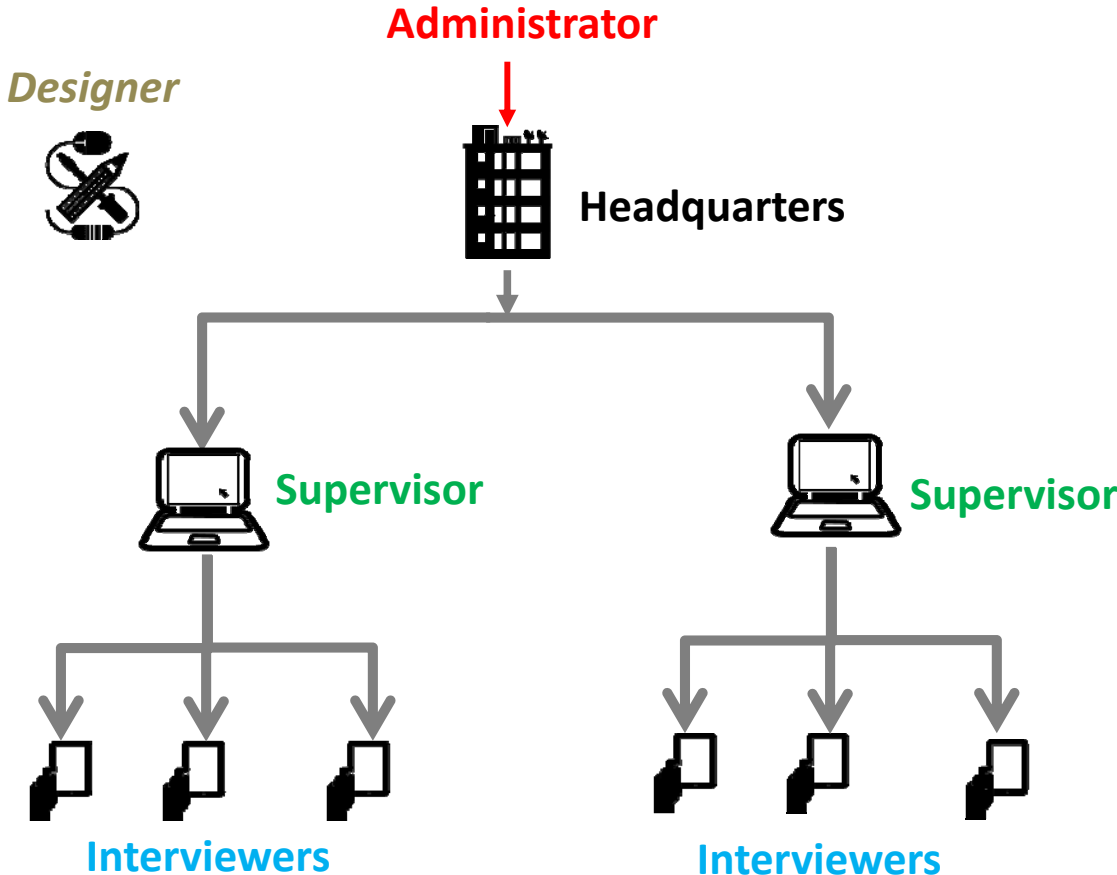
# Introduction and case management with Admin/Headquarters/Supervisor



## Outline

- Differences b/t Admin, HQ, and Supervisor
- Introduction to Admin, Headquarters and Supervisors
- Headquarters primary functions in SuSo
- Supervisor primary functions in SuSo
- HQ and Supervisor primary responsibilities in SuSo

# Differences b/t Admin, HQ, and Supervisor



# 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

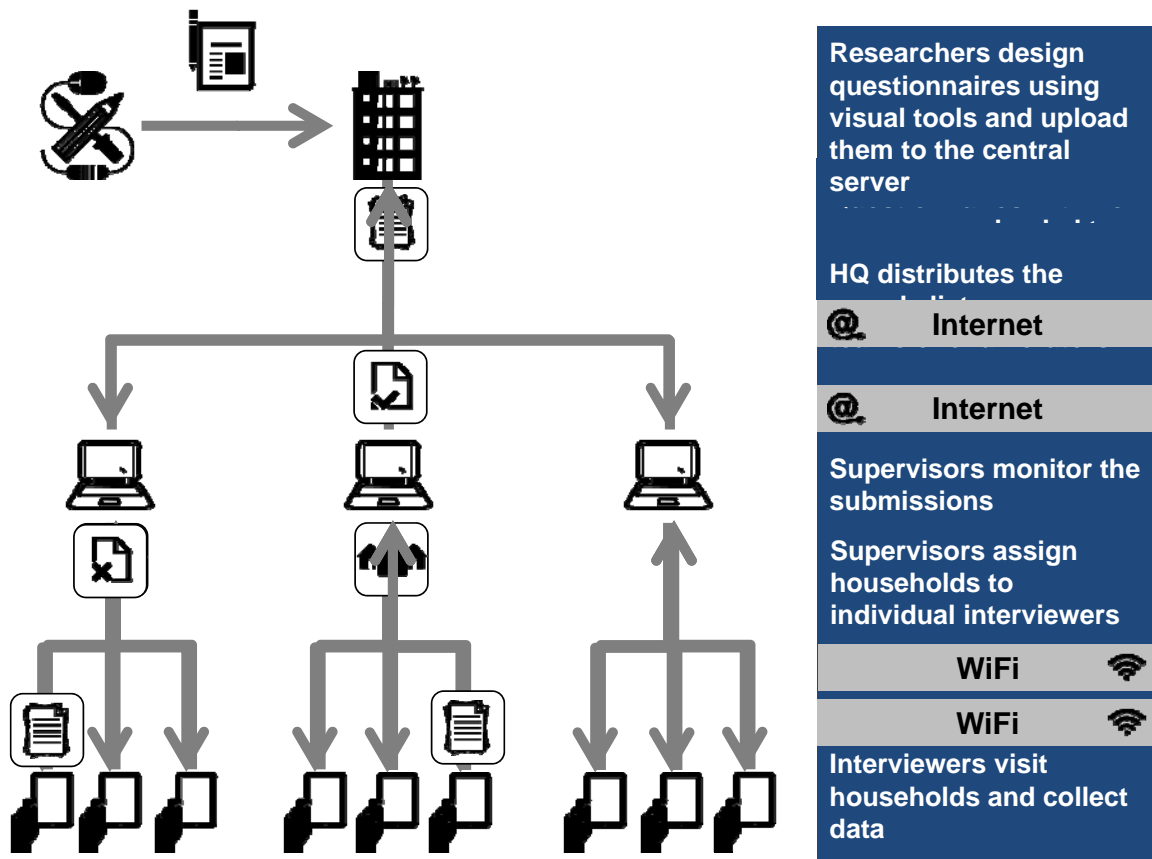
## Supervisor – functions w/i SS

- 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.

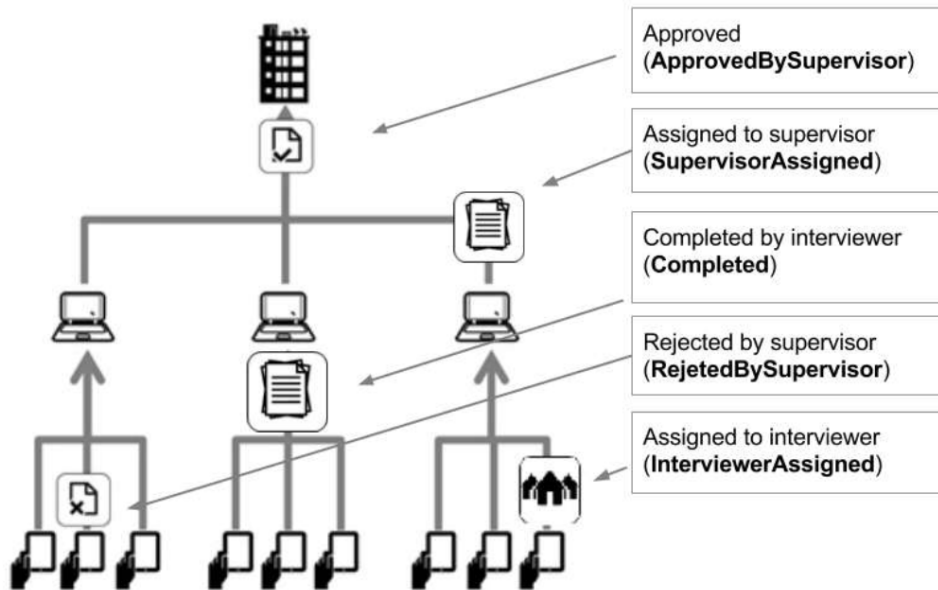
**Review overview of workflow and life of a case**



## 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.
- 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

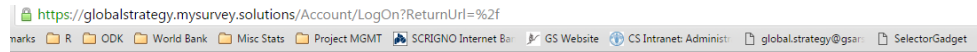


## Introduction to Headquarters and Supervisor



# 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

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

The screenshot shows the 'Headquarters' interface with the 'Teams and Roles' menu open. The 'Supervisors' option is circled in red, with an arrow pointing to the 'Supervisors' page. The 'Supervisors' page features a search bar and a table of supervisors.

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

The screenshot shows the 'Headquarters' interface with the 'Teams and Roles' menu open. The 'Add supervisor' button is circled in red, with an arrow pointing to the 'Create supervisor' form. The form includes fields for User name, Password, Confirm password, Email, Full name, and Phone number, along with a checkbox for 'Is locked by Admin or HQ' and 'Save changes' and 'Cancel' buttons.

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

# Headquarters – Create Interviewer

The screenshot shows the 'Headquarters' interface with the 'Interviewers' section active. A red circle highlights the 'Supervisors' dropdown menu, which contains the options 'Supervisors', 'Interviewers', and 'Batch User Upload'. A red arrow points from this menu to the 'Create' button in the 'Interviewers' section.

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

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@gasdtk.com	Nancy
MichaelInter	6/1/2016		Michael
IntCarlotta	6/1/2016		CarlottaC
MichaelInt	6/1/2016		Michael

# Headquarters – Create Interviewer

The screenshot shows the 'Headquarters' interface with the 'Interviewers' section active. A red circle highlights the 'Create' button, with a red arrow pointing to the 'Create interviewer in team' dialog box. A red text box states 'Interviewers must be assigned to a Supervisor'.

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

The 'Create interviewer in team' dialog box is shown. The 'Supervisor' dropdown menu is open, showing a list of supervisors: Bhanu\_sup, CarlottaC, Iswadi, Michael, and Nancy. The 'Save changes' button is highlighted.

# Headquarters – Import Template

Headquarters | Reports | Interviews | Supervisors | **Questionnaires** | Hi, GlobalStrategy

### Questionnaires

**Import template**

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	

Headquarters | Reports | Interviews | Supervisors | **Questionnaires** | Hi, GlobalStrategy

**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\_rahja  
 .....

**Sign in**

# Headquarters - Import Template

Headquarters | Reports | Interviews | Supervisors | **Questionnaires** | Hi, GlobalStrategy

### Designer Questionnaires

Search

Title	Actions
DURBAN_LSMS_HH_demo4Michael	
CROP - Test - Questionnaire	
ARDS_Tanzania MONTHLY	

- 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 exercises.

# Headquarters – Create Cases

Census	Title	Version	Import date	Creation Date	Last Entry Date	Actions
	Team 5 - Training Questionnaire - FAORAP - SAMPLE	1	09/28/2016	09/28/2016	09/28/2016	
✓	Training Questionnaire - FAORAP - Census	2	09/28/2016	07/13/2016	09/28/2016	
✓	Trying Translation_Household Roster	1	09/29/2016	06/13/2016	09/29/2016	
✓	Training Questionnaire - FAORAP - Census	1	09/28/2016	07/13/2016	09/28/2016	

- **Copy** make a copy of the questionnaire
- **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

Create new interview Gender - Version1\_prefilled

Name of holder (test) T Joe

Responsible Michael x

**Prefilled information**

**Supervisor Assignment**

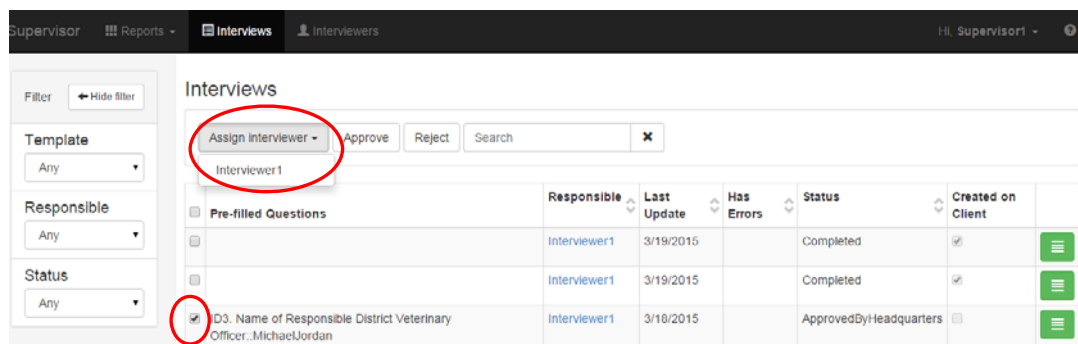
Create Cancel

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5.9.10 (build 12369) | Get Interviewer App

# Supervisor primary functions in SuSo

- Assign cases to Interviewers

## Supervisor – Assign Cases



The screenshot displays the 'Interviews' section of the SuSo application. On the left, there are filter options for Template, Responsible, and Status, all set to 'Any'. The main area shows a table of interviews. The 'Assign Interviewer' dropdown menu is highlighted with a red circle, and the 'Interviewer1' option is selected. The table below shows a list of interviews with columns for Responsible, Last Update, Has Errors, Status, and Created on Client.

	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"/>	D3: Name of Responsible District Veterinary Officer..MichaelJordan	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

Interviews **Actions** **Search** **Review**

Pre-filled Questions	Responsible	Last Update	Has Errors	Status	Received by Interviewer	Created on Client
Name of holder (test): Shima	CarlottaC	8/30/2016		SupervisorAssigned		
Name of holder (test): Jane	CarlottaC	8/30/2016		SupervisorAssigned		
Name of holder (test): Michael	CarlottaC	8/30/2016		SupervisorAssigned		
Name of holder (test): Joe	CarlottaC	8/30/2016		SupervisorAssigned		
Name of holder (test): Bill	CarlottaC	8/30/2016		SupervisorAssigned		
	Michael	8/23/2016		SupervisorAssigned		
Please select district name: Chukha	Bhutan_int	8/12/2016		ApprovedByHeadquarters		

- **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

Supervisor | Reports | Interviews | Interviewers | Hi, Supervisor

Filter: Hide filter




Template: Any

Responsible: Any

Status: Any

Interviews

Assign interviewer | Approve | Reject | 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"/>	

# HQ and Super – Approve/Reject

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

Trying Translation\_Household Roster | Status: Completed | Language: (فارسی) Trying Translator

Responsible: Random2016

enabled (0) | answered (5) | unanswered (1) | invalid (0) | commented (0) | tagged (0) | supervisor's (0) | hidden (0)

فهرست خانوادہ-اطلاعات پایه ای

نام	جیڈ	نوعیت
جیڈ	جیڈ	مرد
جیڈ	جیڈ	زن
جیڈ	جیڈ	1,985
جیڈ	جیڈ	زنجیرہ
جیڈ	جیڈ	قوس
جیڈ	جیڈ	مرد
جیڈ	جیڈ	تورق
جیڈ	جیڈ	مہ
جیڈ	جیڈ	زبان
جیڈ	جیڈ	جولانی
جیڈ	جیڈ	کوت

Toggle between languages

# HQ and Super – Approve/Reject

The screenshot shows the HQ interface for a survey titled "Trying Translation\_Household Roster" with a status of "Completed". The responsible user is "Random2016". The survey is titled "[B-1] Household Roster - Basic Information" and is for a household named "gjyf". The survey questions are:

- 1. NAME: gjyf
- 2. What is the gender of gjyf?: MALE (selected)
- 3. In what year was gjyf born? (4-DIGIT): 1985
- 4. In what month was gjyf born? (MONTH): JANUARY (selected)

- Approve/Reject interviews
- Write comments
- Flag
- Navigate between chapters
- Filter questions

# HQ and Super – Approve/Reject

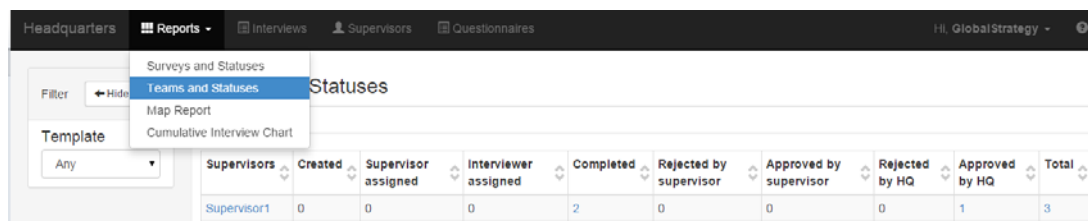
The screenshot shows the Supervisor interface with a list of interviews. The interface includes a filter sidebar and a main table of interviews.

Filter	Hide filter	Assign Interviewer	Approve	Reject	Search	Responsible	Last Update	Has Errors	Status	Created on Client
Template	Any	Interviewer1				Interviewer1	3/19/2015		Completed	<input checked="" type="checkbox"/>
Responsible	Any					Interviewer1	3/19/2015		Completed	<input checked="" type="checkbox"/>
Status	Any					ID3: Name of Responsible District Veterinary Officer..MichaelJordan	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.

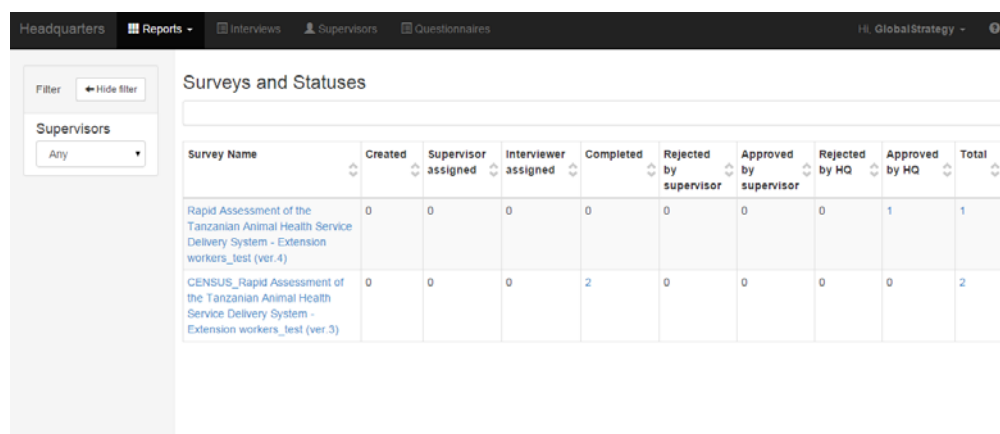


The screenshot shows the 'Statuses' report interface. On the left, there is a sidebar with a 'Filter' section containing a 'Hide filter' button and a 'Supervisors' dropdown menu set to 'Any'. Below the filter is a 'Template' dropdown also set to 'Any'. The main content area is titled 'Statuses' and contains a table with the following data:

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

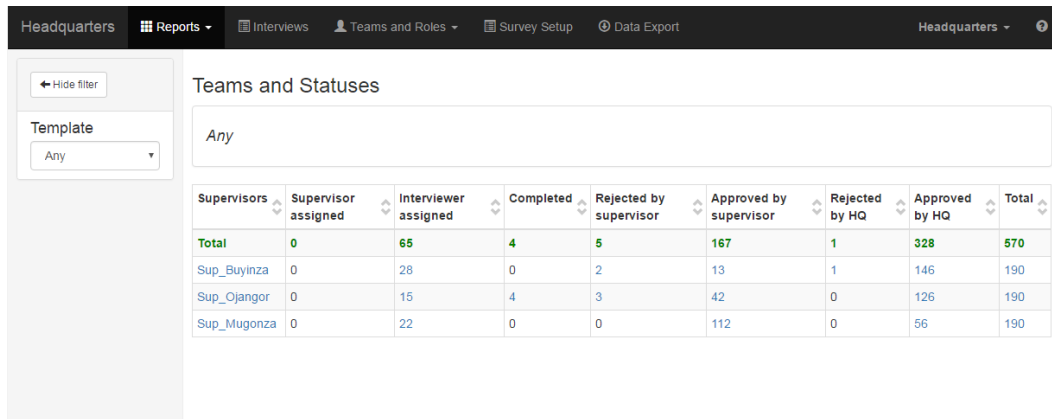


The screenshot shows the 'Surveys and Statuses' report interface. On the left, there is a sidebar with a 'Filter' section containing a 'Hide filter' button and a 'Supervisors' dropdown menu set to 'Any'. The main content area is titled 'Surveys and Statuses' and contains a table with the following data:

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



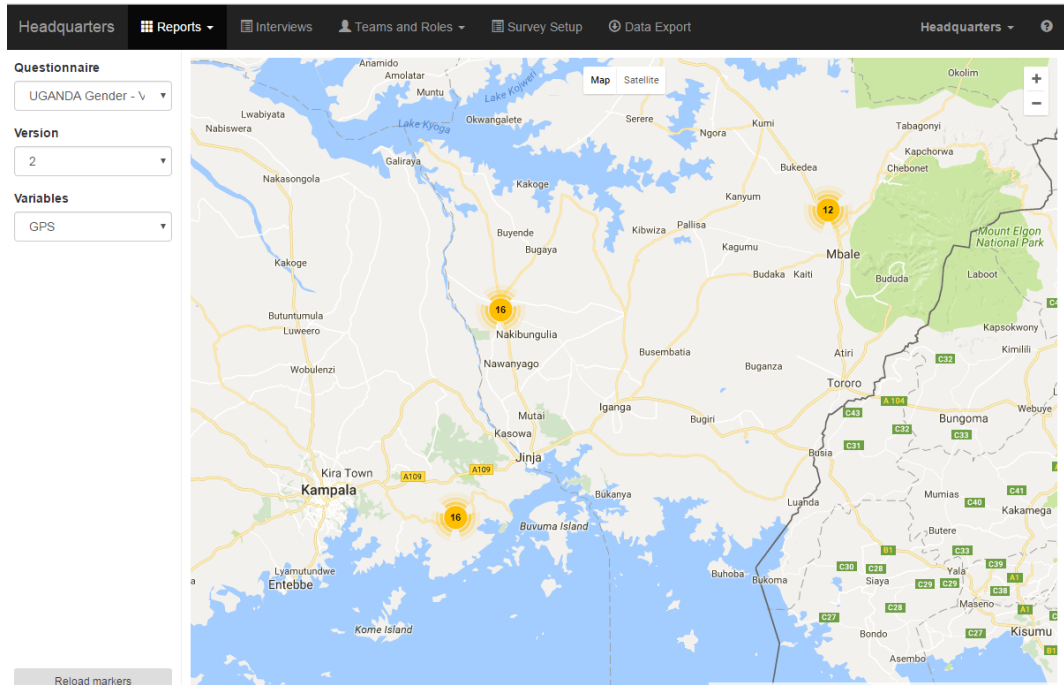
Supervisors	Supervisor assigned	Interviewer assigned	Completed	Rejected by supervisor	Approved by supervisor	Rejected by HQ	Approved by HQ	Total
<b>Total</b>	0	65	4	5	167	1	328	570
Sup_Buyinza	0	28	0	2	13	1	146	190
Sup_Ojangor	0	15	4	3	42	0	126	190
Sup_Mugonza	0	22	0	0	112	0	56	190

- **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.

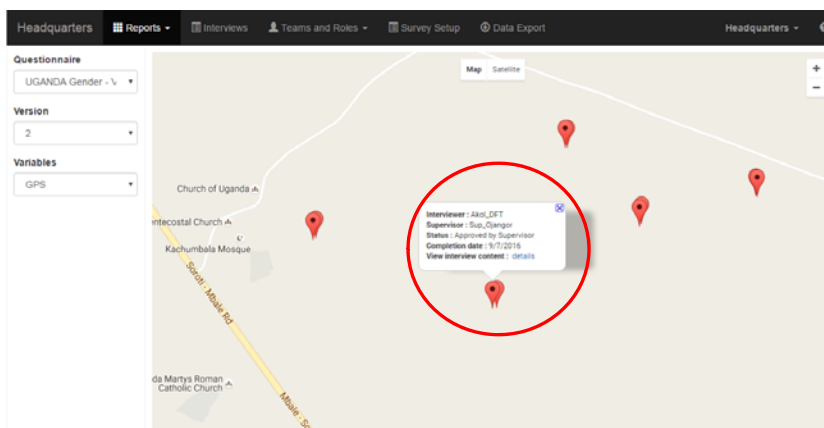
## Headquarters ONLY reports

- 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

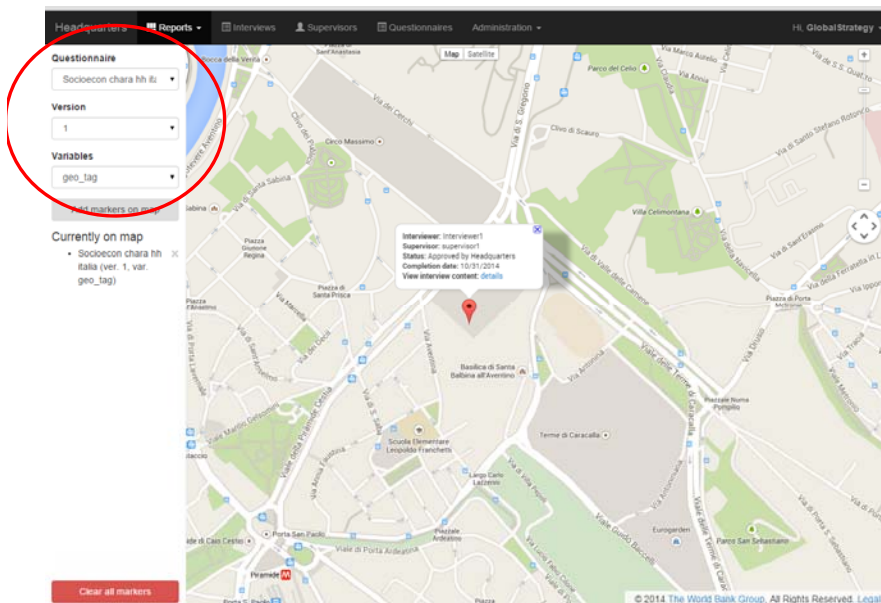


# Headquarters ONLY reports



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

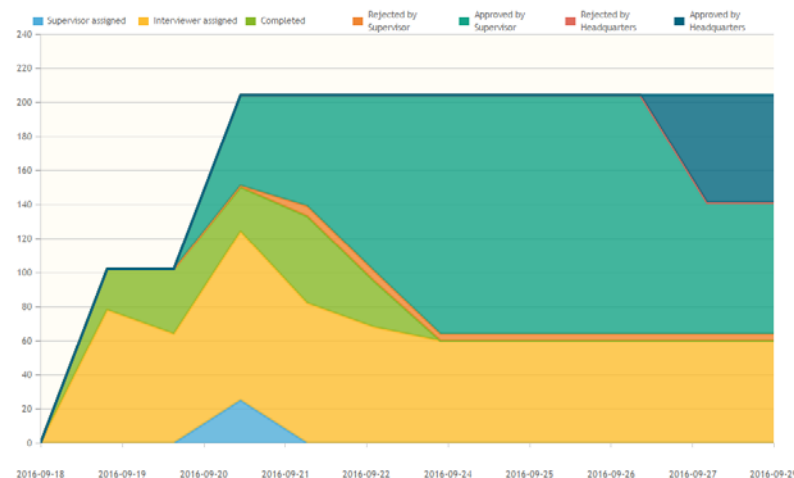


Filter by questionnaire, version, and variable.

# Headquarters ONLY reports

(ver. 6) ENUMERATION - UGANDA Gender - Version10 16Sept2016

Refresh



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

**QUESTIONS?**