Survey Solutions CAPI for surveys/censuses

Nadi, Fiji

Survey Solutions: Headquarter

Sergiy Radyakin
sradyakin@worldbank.org

Development Data Group (DECDG),
The World Bank

March 27-31, 2017

DEVELOPMENT RESEARCH

THE WORLD BANK

Food and Agriculture Organization of the United Nations

Role of Headquarter

Headquarter component provides the following functionality:

- Reports to track overall progress of the survey;
- Interviews to review and approve/reject completed interviews;
- Teams and Roles to manage teams (create accounts for all persons using Survey Solutions);
- Survey Setup to import survey instruments and export collected data;
- Data Export to export the data collected during the survey;

Headquarter Server

- Headquarter is a component that must be installed on a server that all other components can (and will) connect to;
- Hence it is important that the server is a reliable computer with a high uptime, connected using a fast and reliable internet connection.

- Cloud is most common and preferred location for placing the headquarter component.

HQ Server Setup

- If you are using a cloud solution, you will receive a web link to a server, where the headquarter component is already installed.
- If you are installing and configuring HQ server yourself, you must configure the Microsoft Windows Server, Microsoft IIS, and install the installation file you receive from the Survey Solutions team.
- After the HQ-component is installed you need to create (immediately, without delay) the administrator user account, by specifying the desired login and password.
- The login and password for the Survey Solutions administrator account don't have to be same as the computer's administrator user credentials (preferrably pick different name and password).
- The user designated as the administrator (the first user created, also known as the rootuser) has the privelege to create accounts and designate roles of all other users. In particular he can create headquarter, supervisor, interviewer and observer accounts.

HQ: Reports: Surveys and Statuses

- especially useful when administering multiple surveys simultaneously;
- displays progression of data collection in each survey by showing counts of interviews in each state (status);
- leftmost columns correspond to initial stages of data collection: the survey starts with all interviews assigned to supervisors.
- rightmost columns correspond to final stages of data collection: the survey is completed when all the interviews are approved by the headquarter.

HQ: Reports: Teams and Statuses

- similar to "Surveys and Statuses" report, but aggregates all surveys by team;
- displays progression of data collection by each team by showing counts of interviews in each state (status);
- leftmost columns correspond to initial stages of data collection: so teams having more interviews in the left columns are having more work left to do.
- rightmost columns correspond to final stages of data collection: the teams that have more interviews in the Approved By Headquarter column are closer to completion of their workload.

HQ: Reports: Maps Report

- this report is only useful if the survey collects geo-location (GPS);
- displays progression of data collection by showing on the map markers for locations of households where data was collected;
- no special map files are required: Google maps are used for map data;
- the report allows to discover patterns in the data (concentration around a certain location or a main road, faster progress in one area vs. another, etc.)
- to avoid cluttering, markers can be grouped together automatically in a group marker; to see individual household locations: zoom in.

HQ: Reports: Maps Report

To see a map report one needs to set up a few parameters in the left panel:

- Questionnaire - select which survey questionnaire you want to work with.

- Version - select which version (normally there is one version only) you want to work with.

- Variables - select which coordinates you want to show (most questionnaires record the location of the interview, one variable).

User accounts

- Headquarter user has the authority to create all other user accounts in the system;
- Supervisor accounts should be created first;
- Interviewer accounts should be created within an existing supervisors team;
- Accounts can be locked if necessary;
- Accounts may get locked if too many incorrect logins occur;