

Session 5B: Practice: Mastering the whole system – SAMPLE MODE

Each Team should decide which team member will perform the duties of the following roles:

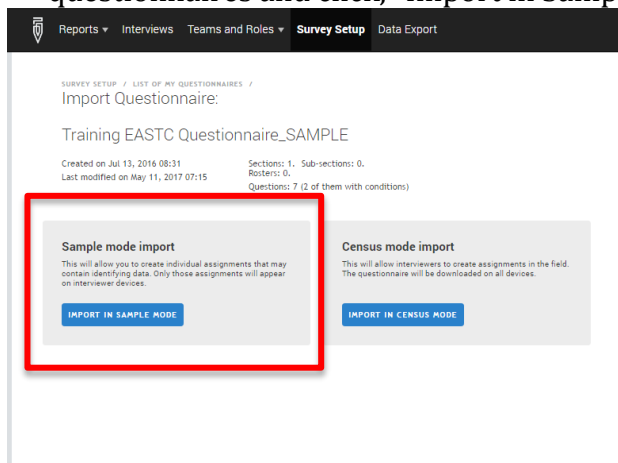
1. Headquarters (1 person)
2. Supervisor (1 person)
3. Interviewers (atleast 2 people)

TASK 1: Headquarters logs in and imports a questionnaire template in census mode.

- **Headquarters** should log onto the server <https://eastctrain.mysurvey.solutions> with the following credentials:
 - Team 1: login: Team1HQ, password: Password2016
 - Team 2: login: Team2HQ, password: Password2016
 - Team 3: login: Team3HQ, password: Password2016
 - Team 4: login: Team4HQ, password: Password2016
 - Team 5: login: Team5HQ, password: Password2016
- **Headquarters** should go to “Survey Setup”, and select import template



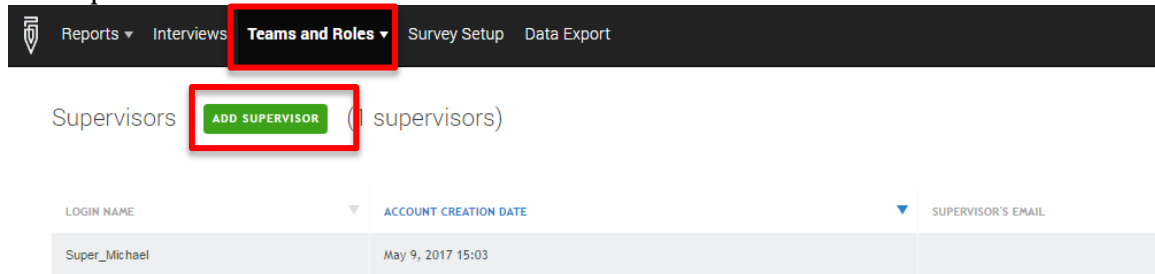
- Now you must login into the designer. For the purpose of this training, use the following credentials:
 - Name: Training_iasri, password: Password2016
- Now select “Training EASTC Questionnaire_SAMPLE” from the list of questionnaires and click, “Import in Sample Mode”.



- Note that this questionnaire is on “SAMPLE MODE”. As a result, the headquarters must create cases, and assign to Supervisors. This comes later in Task 4.

TASK 2: Headquarters must create Supervisor Roles.

- **Headquarters** must select Teams and Roles -> Supervisors -> Add Supervisor.



- The **Headquarters** for corresponding teams should create **Supervisors** with the following credentials (no other information is required):
 - Team 1: User name: Team1_Super, password: Password2016
 - Team 2: User name: Team2_Super, password: Password2016
 - Team 3: User name: Team3_Super, password: Password2016
 - Team 4: User name: Team4_Super, password: Password2016
 - Team 5: User name: Team5_Super, password: Password2016

SUPERVISORS / Create supervisor

This action will create individual user with supervisor rights, to create several users you can use [user batch creation](#).

* User name:

* Password:

* Confirm password:

Is locked by Admin or HQ

Personal information details (optional) will be visible to HQ users only

Full name:

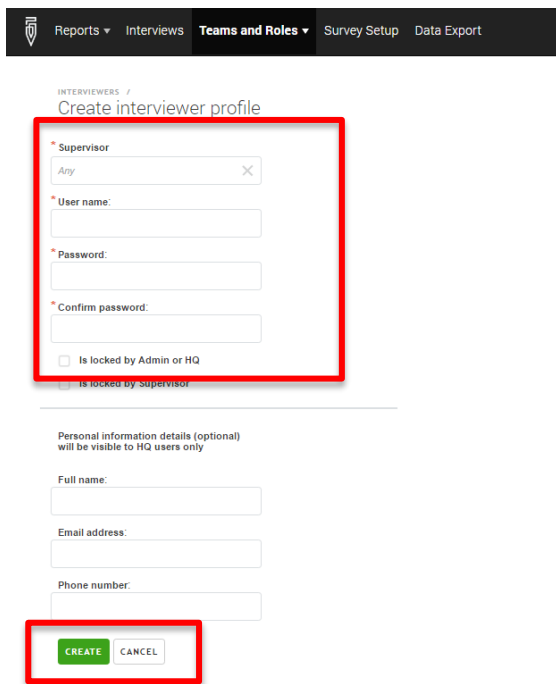
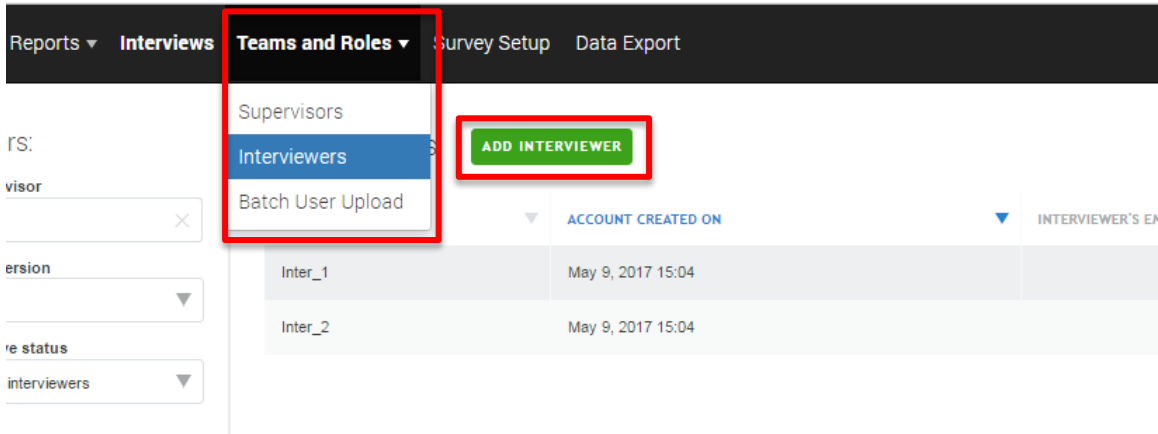
Email address:

Phone number:

TASK 3: Headquarters must create Interviewer Roles and assign them to the proper Supervisor

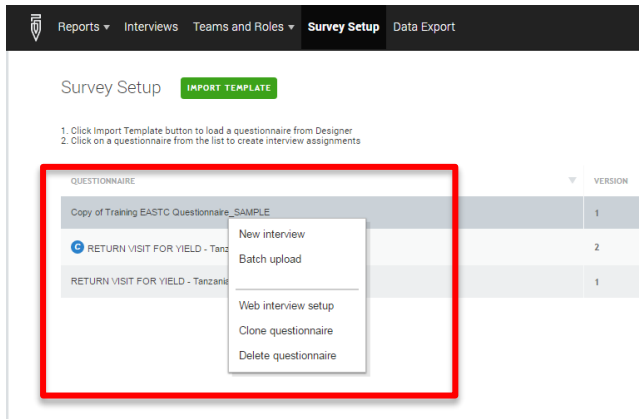
- The **Headquarters** for corresponding teams should create 2 **Interviewers** with the following credentials (no other information is required):
 - Team 1: User name: Team2_Super, password: Password2016
 - User name: Team1_Inter1, password: Password2016
 - User name: Team1_Inter2, password: Password2016
 - Team 2: User name: Team2_Super, password: Password2016
 - User name: Team2_Inter1, password: Password2016
 - User name: Team2_Inter2, password: Password2016

- Team 3: User name: Team3_Super, password: Password2016
 - User name: Team3_Inter1, password: Password2016
 - User name: Team3_Inter2, password: Password2016
- Team 4: User name: Team4_Super, password: Password2016
 - User name: Team4_Inter1, password: Password2016
 - User name: Team4_Inter2, password: Password2016
- Team 5: User name: Team5_Super, password: Password2016
 - User name: Team5_Inter1, password: Password2016
 - User name: Team5_Inter2, password: Password2016

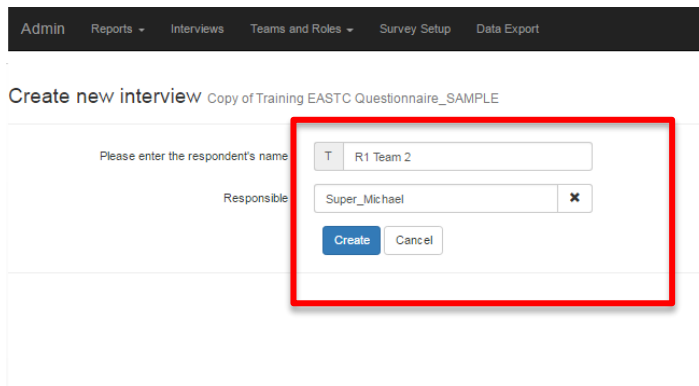


TASK 4: Headquarters must create cases and assign to interviewers.

- To create a case click “Survey Setup”, click on the questionnaire titled “Training EASTC Questionnaire_SAMPLE”. Select “New Interview”.

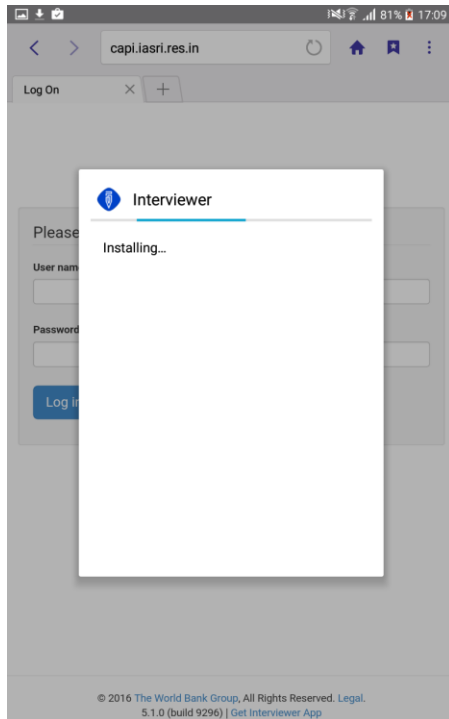


- Create the first case by entering the name “R1 Team [INSERT TEAM #]”. Choose the relevant supervisor for your team from the drop-down menu under “Responsible”.
- Create the second case by entering the name “R2 Team [INSERT TEAM #]”. Choose the relevant supervisor for your team from the drop-down menu under “Responsible”.
- Choose the relevant supervisor for your team team from the drop-down menu under “Responsible” and click “Create”.



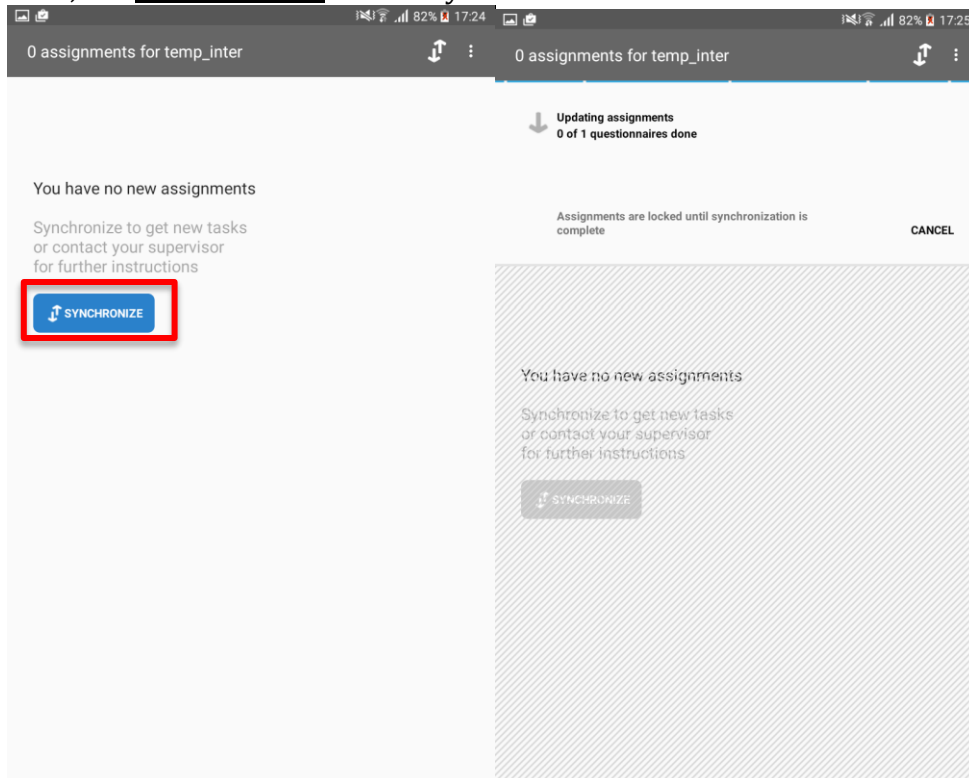
TASK 5: Supervisor must login and assign the two cases to interviewers.

- Supervisor should log into and use the correct credentials at <https://eastctrain.mysurvey.solutions>.
- Supervisor should go to “Interviews” and select the cases with status “Supervisor Assigned” , and the Responsible is the correct Supervisor. There should be two cases.
- Assign one case to each Interviewer.



TASK 6: Interviewers must log in to Interviewer Application, synchronize, and complete an interview.

- The **Interviewers** should open the interviewer application and enter their login credentials.
- Now, the **Interviewers** should synchronize.



- When synchronization is complete, there should be one assigned case on the dashboard.
- Open the questionnaire and create, and complete an interview.

- When this interview is completed, it should appear as completed on your dashboard. Now synchronize to send the completed case to the server.

TASK 7: Supervisors must log in to Supervisor to review and approve the completed cases.

- **Supervisors** must log onto the server using the proper credentials, and select “Interviews”. Then click on the 8 digit ID corresponding to the interview for approval.

Reports Interviews Teams and Roles Survey Setup Data Export Troubleshooting Help admin

Filters: Template (ver 1) FINAL -Tanzania Co... Responsible Any Status Any

Interviews

RESPONSIBLE	LAST UPDATE	HAS ERRORS	STATUS	RECEIVED BY INTERVIEWER	CREATED ON CLIENT
65-11-60-44	5/9/2017	---	RejectedBySupervisor	No	No
45-33-85-34	5/9/2017	---	ApprovedBySupervisor	No	No
61-07-39-65	5/9/2017	---	Completed	No	No
85-24-46-38	5/9/2017	---	Completed	No	No
91-84-61-71	5/9/2017	---	Completed	No	No
60-81-50-82	5/8/2017	---	Completed	No	No
05-91-55-32	5/8/2017	Yes	Completed	No	No
98-59-94-47	5/7/2017	---	Completed	No	No
51-87-47-44	5/7/2017	---	ApprovedBySupervisor	No	No
85-57-79-27	5/7/2017	---	ApprovedBySupervisor	No	No
23-35-10-51	5/7/2017	---	RejectedBySupervisor	No	No

- Supervisors should review the cases, and approve.

Supervisor Reports Interviews Team and Roles HI Team_1_Super

Training IASRI questionnaire Status: Completed Responsible: temp_inter

Approve Reject enabled (4) answered (4) unanswered (0) invalid (0) commented (0) flagged (0) supervisors (0) hidden (0)

New Section

Please select which team you belong to	<input checked="" type="radio"/> Team 1 <input type="radio"/> Team 2 <input type="radio"/> Team 3 <input type="radio"/> Team 4	Write a comment...
Please indicate which describes how you feel about the statement, "Survey Solutions is user friendly"	<input checked="" type="radio"/> Strongly disagree <input type="radio"/> Disagree <input type="radio"/> Neutral <input type="radio"/> Agree <input checked="" type="radio"/> Strongly Agree	Write a comment...
Have you used any type of electronic data collection devices before?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Write a comment...
Please enter the name of the CAPI software you have used before		Write a comment...
Do you think that Survey Solutions can be used to improve data collection processes in your institution	<input checked="" type="radio"/> Yes <input type="radio"/> No	Write a comment...
If you answered no the previous question, please enter the reason you think that CAPI can not offer any improvements.		Write a comment...

TASK 8: Headquarters must log in to review and approve the completed cases.

- Follow the same process that Supervisor completed. The only difference is that the **Headquarters** credentials should be used to log in to the server.