Survey Management Application – World Bank – User Guide

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System Overview and Concepts

The survey management system allows creation, scheduling and management of surveys. The surveys can be administered through SMS or by a call center operative.

The system is organized by projects – each project is a set of related surveys and contacts. Multiple projects can be created through the system website.

This documentation uses the following terms:

- **Survey**: A survey includes questionnaires and samples. Each questionnaire can be scheduled to run at a particular date and time. Each sample can be assigned to SMS surveys or to a particular CATI operator.
- **Questionnaire:** The set of questions to ask a given survey participant. These are also referred to as "forms" when using the system.
- **Sample**: A group of contacts. A given sample can be used in multiple surveys.
- **Contact**: A phone number and unique ID. Users can enter them manually or upload an Excel spreadsheet containing contacts. A contact is unique across an entire project - changing the phone number for a contact number will modify it for all surveys.

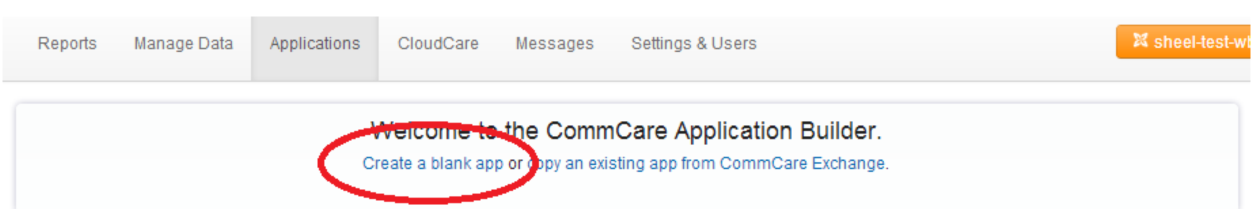
Creating a Project

Navigate to the system website. Log in with an existing user or create a new user. Choose the "Create a Blank Project" button to create a new project. Specify a name for the new project.

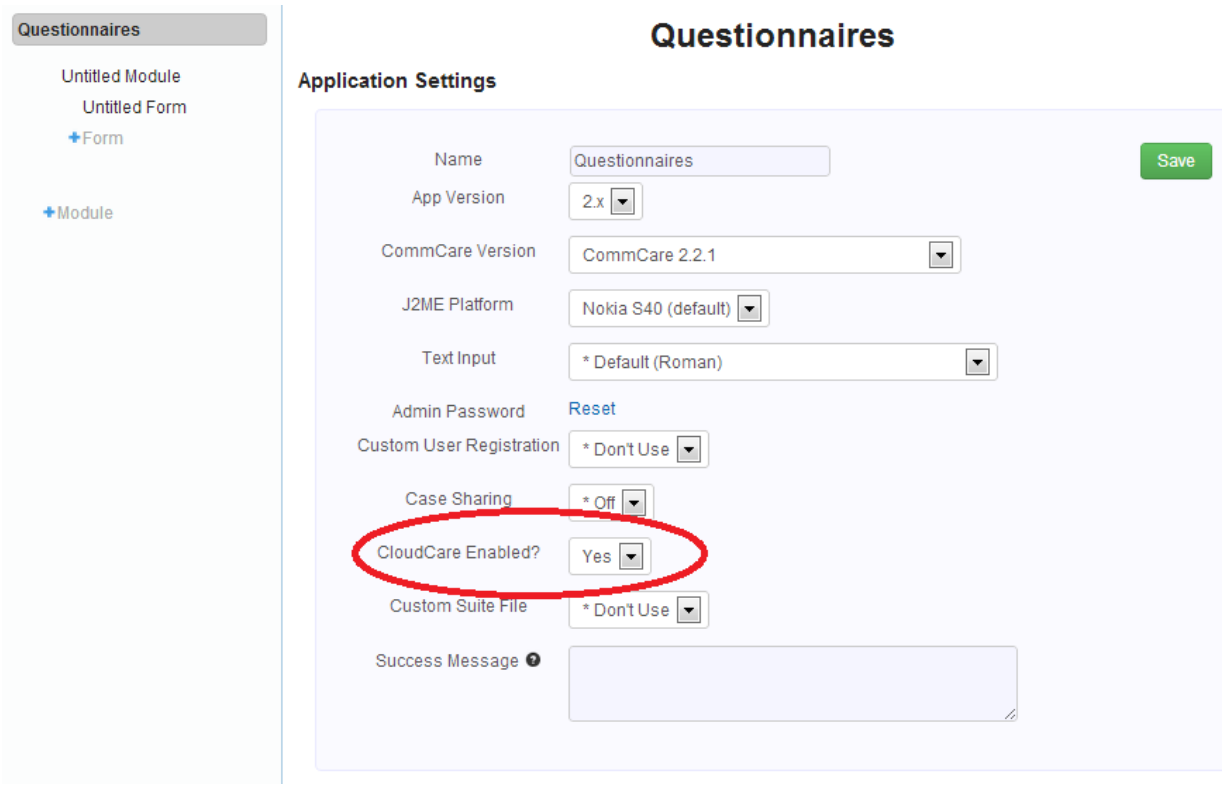
To work within an existing project, select the project name from those from the list of projects.

Defining Questionnaires

Questionnaires or forms designed in the system can be sent via a call center or SMS. To define a questionnaire, use the "Applications" tab at the top of the screen. Create a new application that will contain all the questionnaires for your project.



Once within an application, you can name it what you want (ex. "Questionnaires") and adjust the application's settings. It's also important to enable "CloudCare". This is the web-based system that call center operatives use to enter survey results.



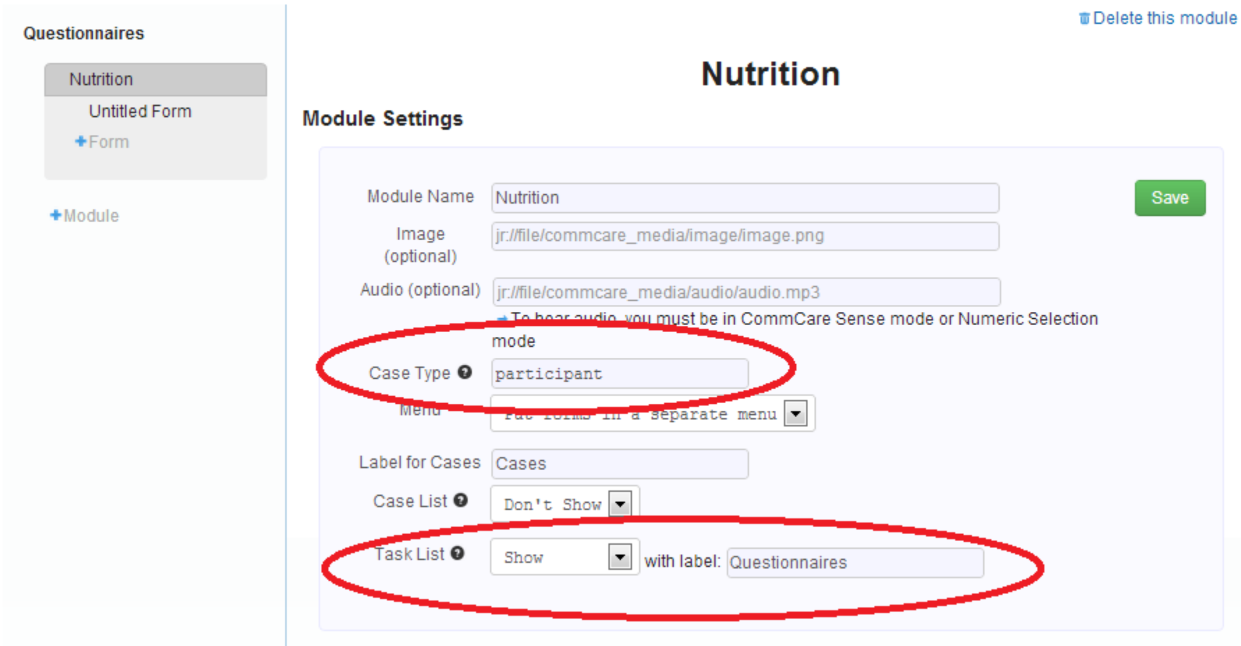
Setting up your Module

Once you create an application, you can use "Modules" to organize related questionnaires. The system generates one module as part of the system, but you can add additional modules using the "+ Module" button in the left sidebar.

Select a module (ex. the existing "Untitled Module" or add a new module), and set a name for it. For example, if you're doing a survey related to nutrition, you could call the module "Nutrition".

You will also need to specify a Case Type. Each contact in the system is represented by a *Case*. Cases will allow us to link multiple questionnaires submitted by the same contact. The system does support different types of Cases, but usually simplest to have the same case type across all your different modules (ex. using the case type "participant").

You'll also need to enable the "Task List" for the module. This will enable the list of questionnaires for a call center operative. You can choose a name for this list (It is simplest to use a name like "Questionnaires").



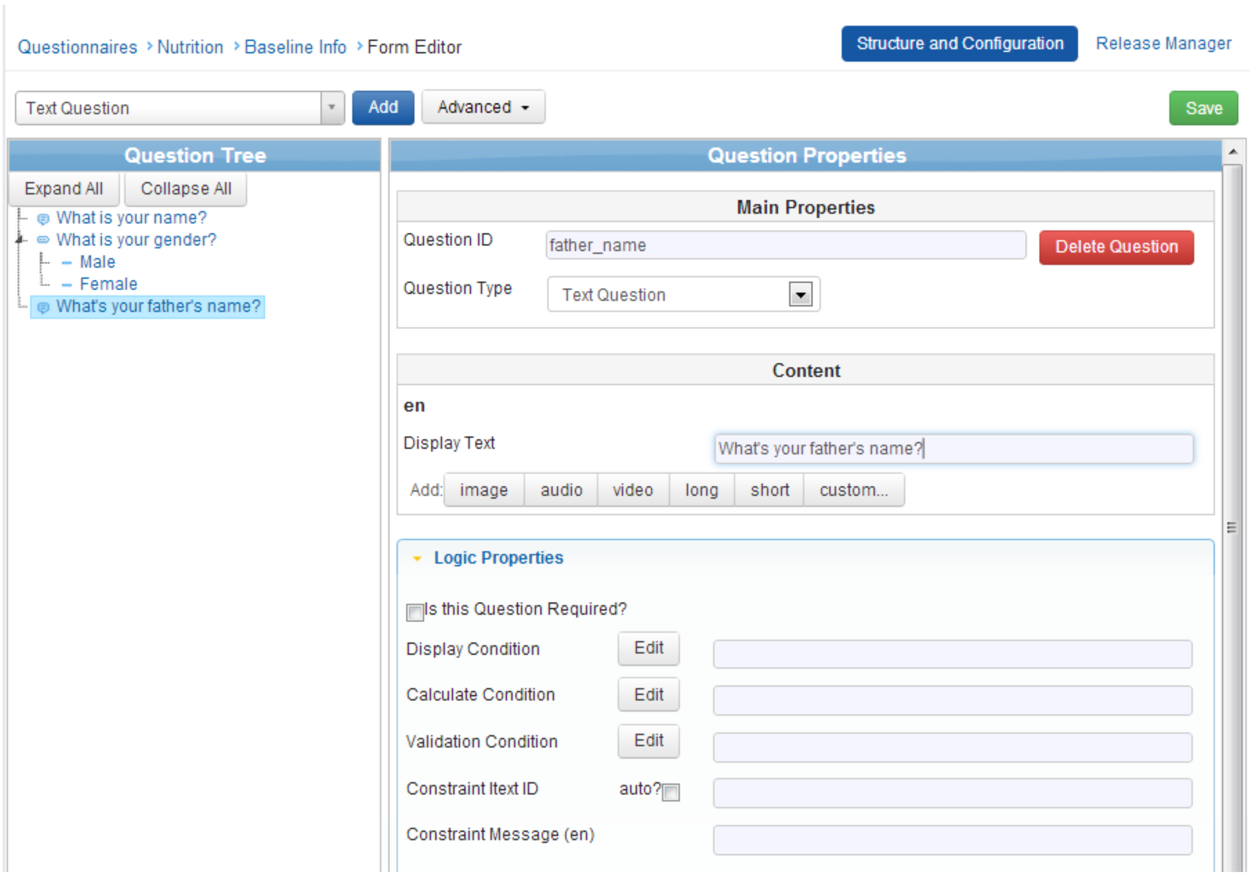
Defining Questionnaires

Within a module, you can then define the questionnaires (which are called forms within the system). Select an existing form or use the "+Form" button. Give the new form a name, and select the "Create" button. Forms that already have some questions will instead have an "Edit" button.

You will then be presented with the form editor, which allows you to create forms of varying complexity. More details on form editing capabilities are available here:
https://confluence.dimagi.com/display/commcarepublic/

https://confluence.dimagi.com/display/commcarepublic/Form+Designer

To add a new question to the form, select the question type the dropdown menu in the top left. For each question, you'll need to specify a question_id (a name used for the data in form exports) and display text (the text actually displayed to the user through the call center or SMS system). For example, you may set the question_id to "father_name" but set the display text to "What is your father's name?".

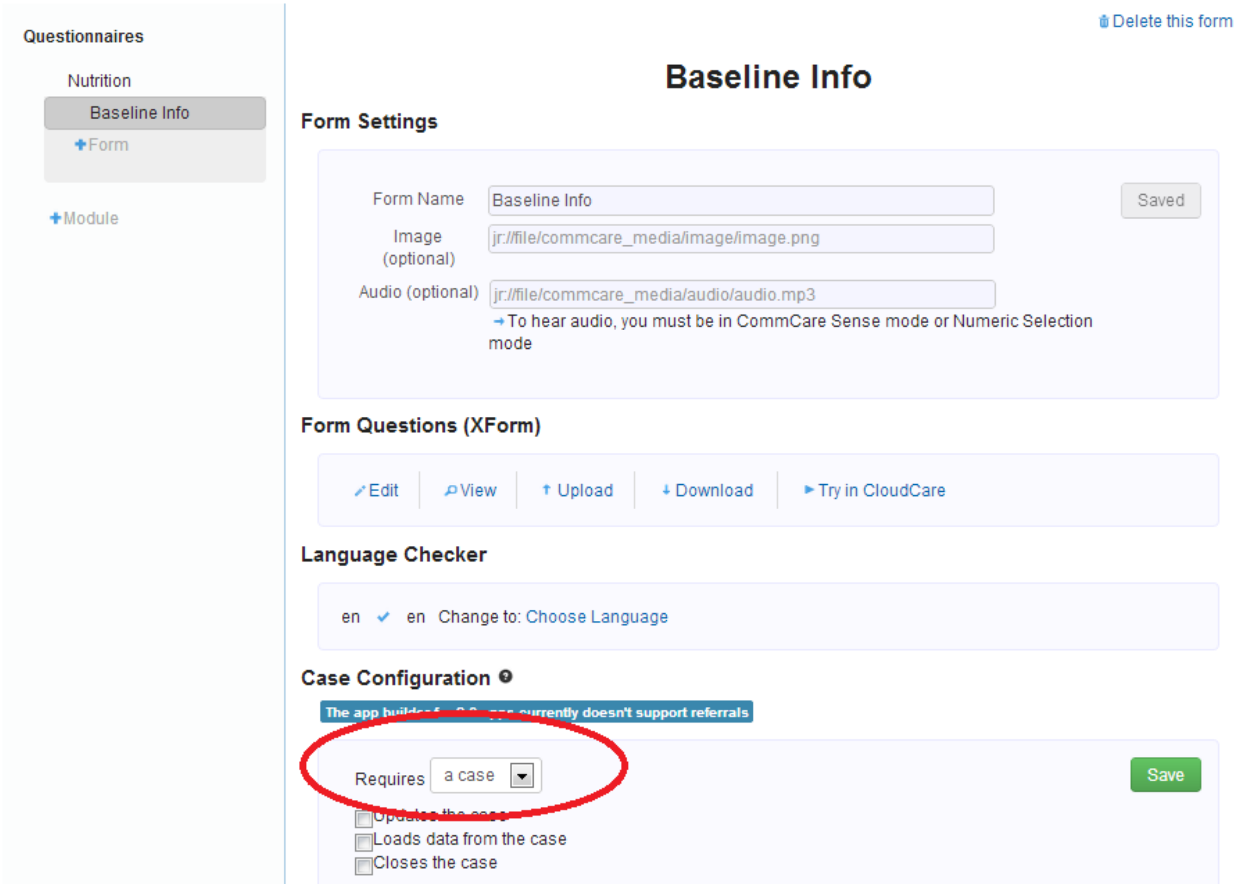


You can also specify display conditions for each question – logic that will control whether a question appears based on the answers to other questions. For example, if you ask a question "What is your gender" and the answer is "female", you may want to ask as a follow up question "Are you currently pregnant?"

Similarly, you can also specify validation conditions for each question – logic that will determine whether the answer to a particular question is valid. For example, you may not want participants in a survey to have the ability to say that their date of birth is in the future.

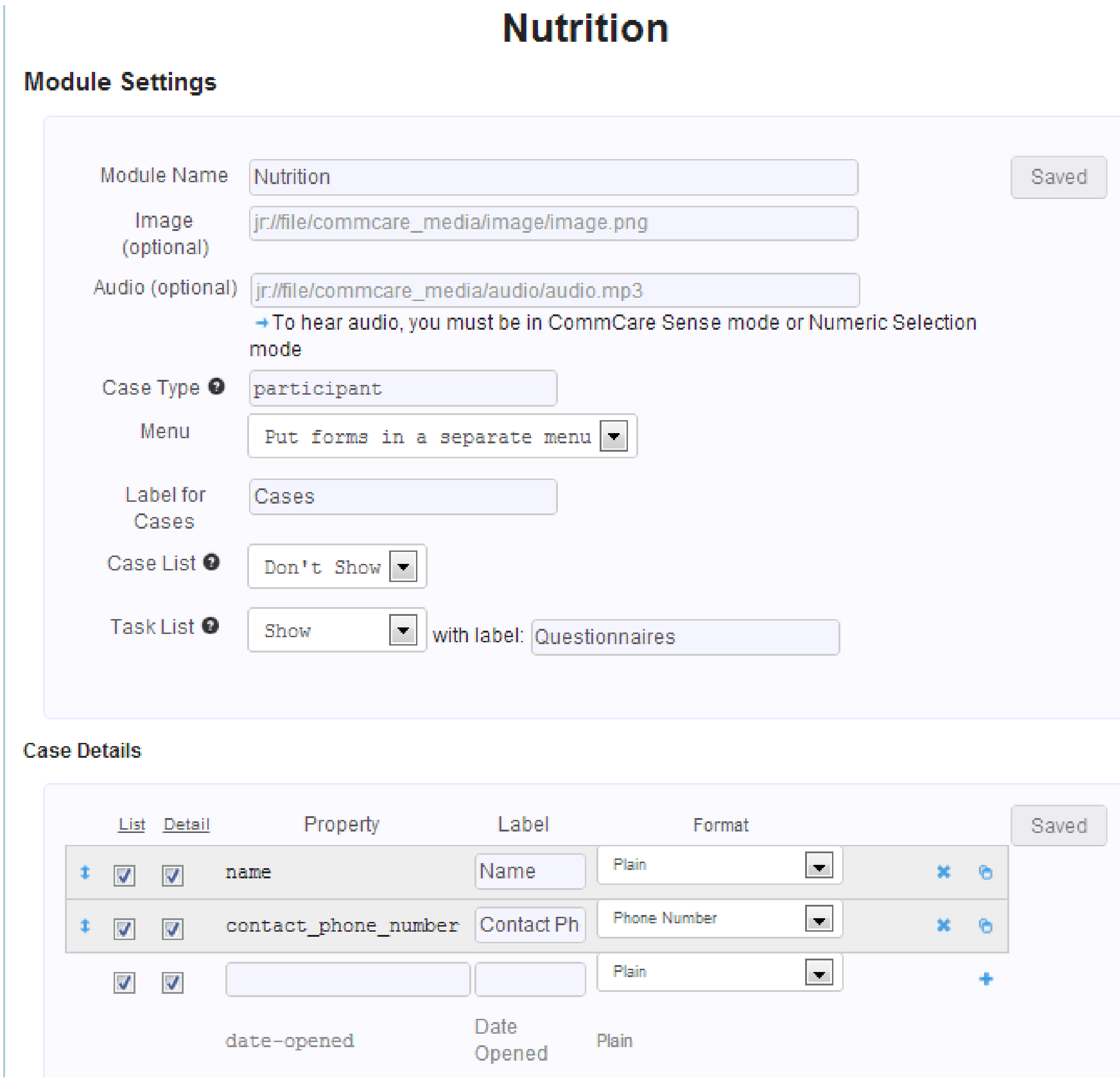
Completing Configuration on a Form and Module

After designing your form, return to the main form screen. There will be additional options titled "Case Configuration". You will need to set the "Requires" dropdown to "a case".



Once you've got the first form properly set up in your module, you'll need to finish configuring the module. Select the module from the left list and there should be additional options available titled "Case Details". Click on the entry titled "name" in the list. In the textbox below, you will also manually need to type "contact_phone_number" and hit the "+" button. This is needed to display the name and phone number of the participant in the CATI list.

These steps will create two entries ("Name" and "Contact Phone Number") at the top of the list.

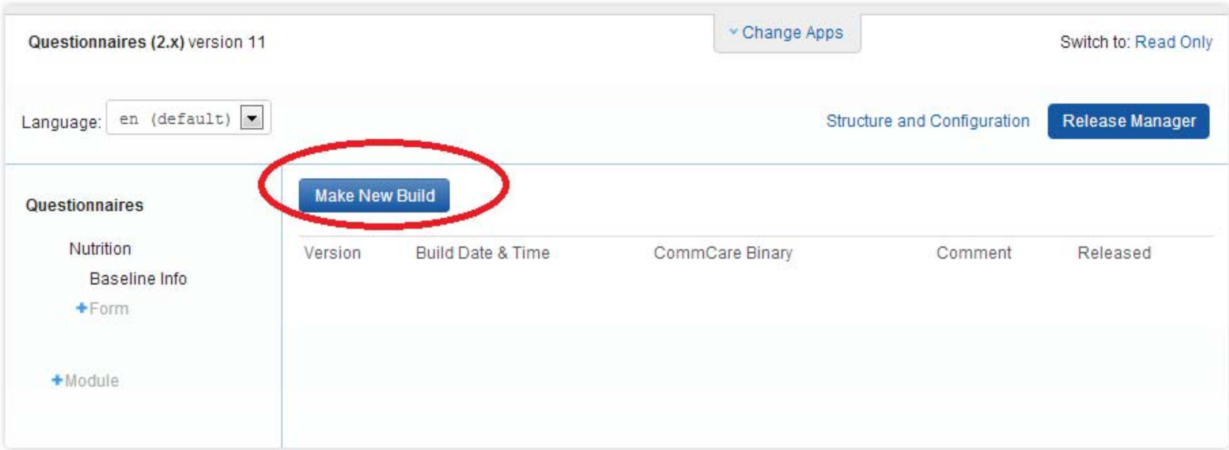


Additional Forms

Now that your module and first form is setup correctly, you can add additional questionnaires to the system using the "+Form" button. You will still need to make sure you enable the "Require a case" option for each form that you create.

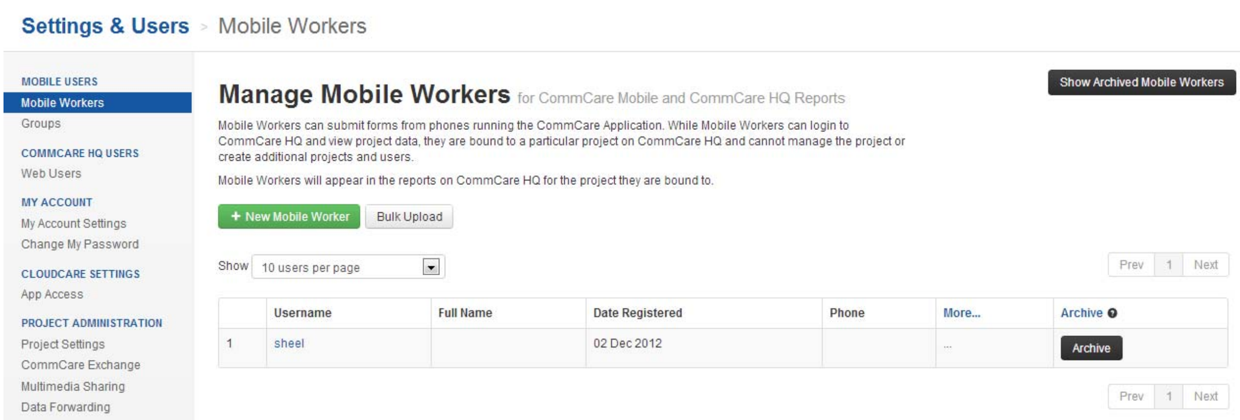
Building the Application

Once you've made all the changes you require to the forms, navigate to the "Release Manager" tab to rebuild the application. You can then continue to make changes to the application and only build when you'd like to make them available to SMS participants and call center users.



Defining Call Center Users

To create a call center user, select the “Settings and Users” tab at the top of the screen. On the left side, select “Mobile Workers”. This will list your existing call center users and allow you to add new users. When creating a user, you can specify the user’s name and password.



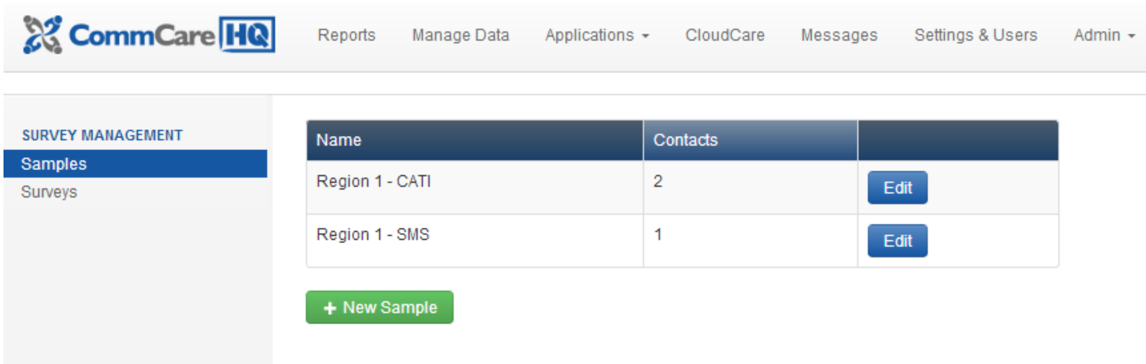
If you’d like to remove a user from the system you can just their password. The “Archive” functionality will actually hide any survey data that they’ve submitted and it is not recommended for this particular use case.

Managing Samples

A sample is set of related contacts that will receive the same survey. For example, you may create a sample for people in a particular geographical area, or for those people who will be receiving a particular incentive. You'll also need to create different samples for those contacts receiving questionnaires via SMS vs. call center.

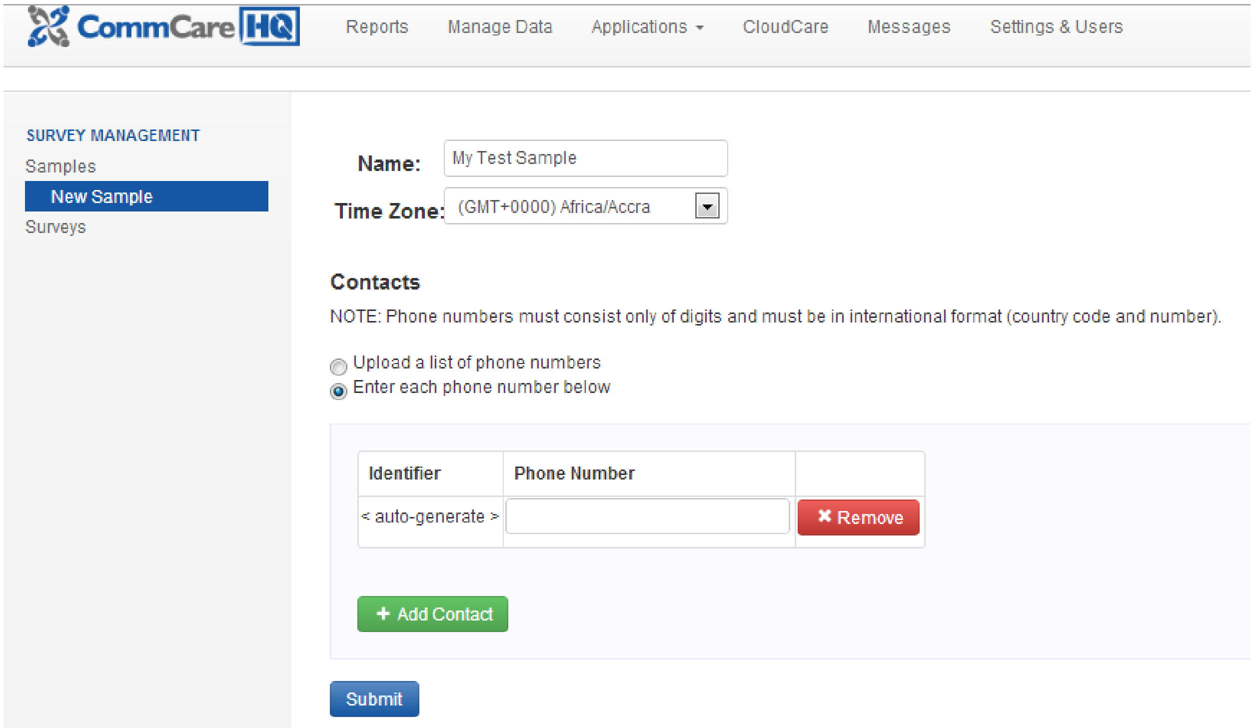
There are two ways to create a sample, either by entering each contact's phone number manually or by uploading an Excel document.

To create a sample, navigate to your project, then add a "/reminders/survey_list" to the URL. Your URL should look something like "www.<my-site>.com/a/<myproject>/reminders/survey_list". On the left side of the screen, select "Samples"



To create a new sample, click on the “+ New Sample” button. To edit an existing list, you can click the “Edit” button next to the name of the sample.
On the sample edit screen, you enter the following information:

1. **Name:** The name of the sample
2. **Time Zone:** The time zone of the sample – this affects when SMSs are sent out to each participant or when a questionnaire appears for a call center operative.
3. **Contacts:** The ability to add or upload contacts.



Contact Management

Contacts can be directly added to the system by just typing in the phone number. The phone number must include the country code and can only be comprised of digits. If an entered phone number matches an existing number in another sample, the two will be linked. Any edits to the contact in one sample will be reflected in the next sample.

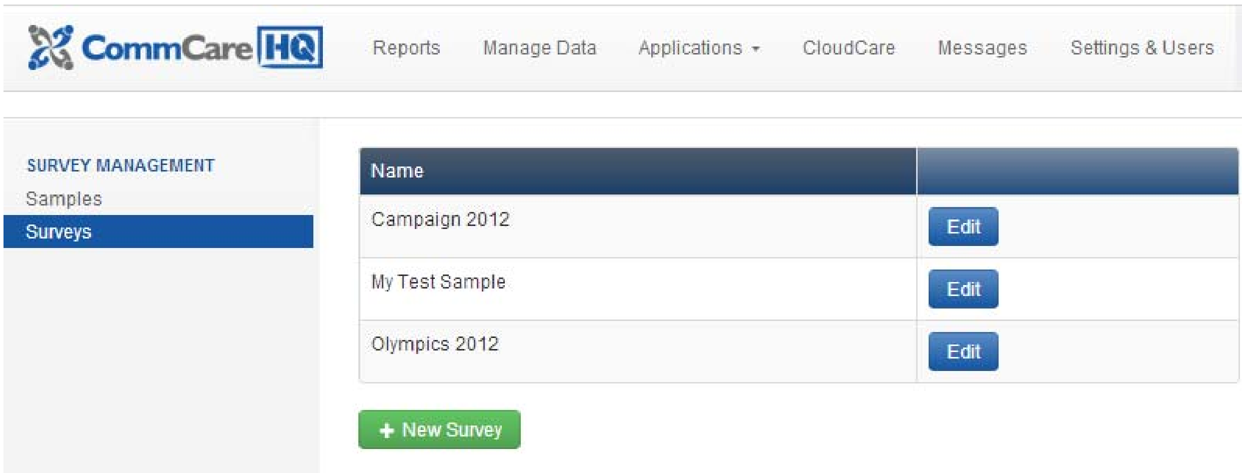
Contacts can also be uploaded using an Excel (xlsx) file. The document must contain a single column titled “PhoneNumber” and with the phone numbers listed there. Select the file, and click the Submit button.

To edit an existing contact within a sample, (for example, if a participants number changes) click on the link that represents the number. This will take you to a separate screen to edit the phone number. If that number is used across multiple samples, it will be changed for all the samples.

Managing Surveys

A survey is comprised a set of questionnaires and samples. The questionnaires are typically related to each other (a set of initial questions and recurring follow ups, for example). Different samples can be used to organize incentives, control SMS vs. call center, and which call center operative is responsible for a set of people.

To manage surveys, navigate to your project, then add a "/reminders/survey_list" to the URL.   Your URL should look something like "www.<my-site>.com/a/<myproject>/reminders/survey_list".   On the left side of the screen, select "Surveys"



To create a new survey, select the "+ New Survey Button".   To edit a survey, click the "Edit" button next to the survey.

You need to specify the following for a survey:

1. **Name:** Name of the Survey
2. **Waves**: A wave is a combination of a questionnaire and a time period to ask that question. Each sample will use its own time zone based on the dates and times specified here. Depending on your use case, you may ask the same questionnaire multiple times (different waves) or have different questionnaires at different times. A given wave is run for *all* samples in the questionnaire.
3. **Follow Up**: Whether the system will provide follow up reminders to survey participants for incomplete questionnaires. You can add multiple follow up times (ex. one after 2 days, another after 6 days, etc.).
4. **Samples**: The samples involved in the survey. You can specify the sample, the format (SMS or CATI), the CATI operator and the incentive (if any).

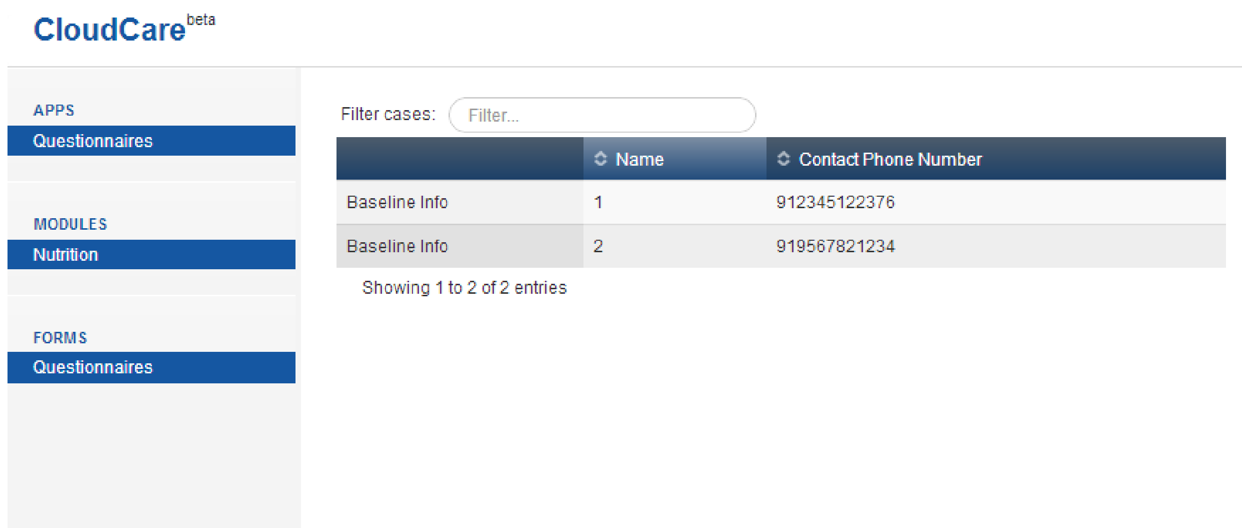
Once the time period for a given wave has expired, any incomplete questionnaires will be marked as "incomplete" and stored in the system. This assumes that there is no logic on the form preventing it from being submit (example, a required question that does not have a value yet).

Note: Once a survey has started (any waves have started), the samples are not editable. If you need to add additional samples to an existing survey, it is simplest to add another survey.

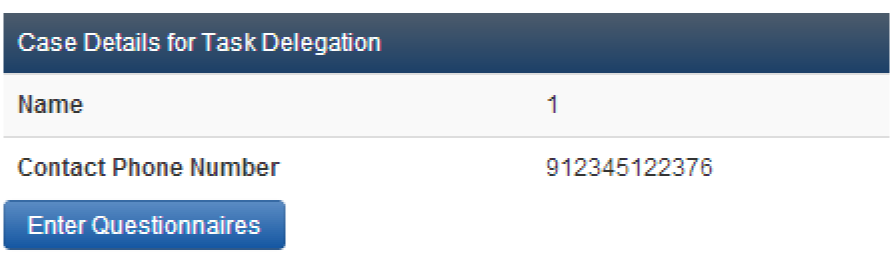
Using the Call Center System

To login to the call center interface, navigate to a URL similar to this one: www.<mysite>.com/a/<myproject>/login. The project name is specified when initially creating the project. You can then login using the call center user's username and password.

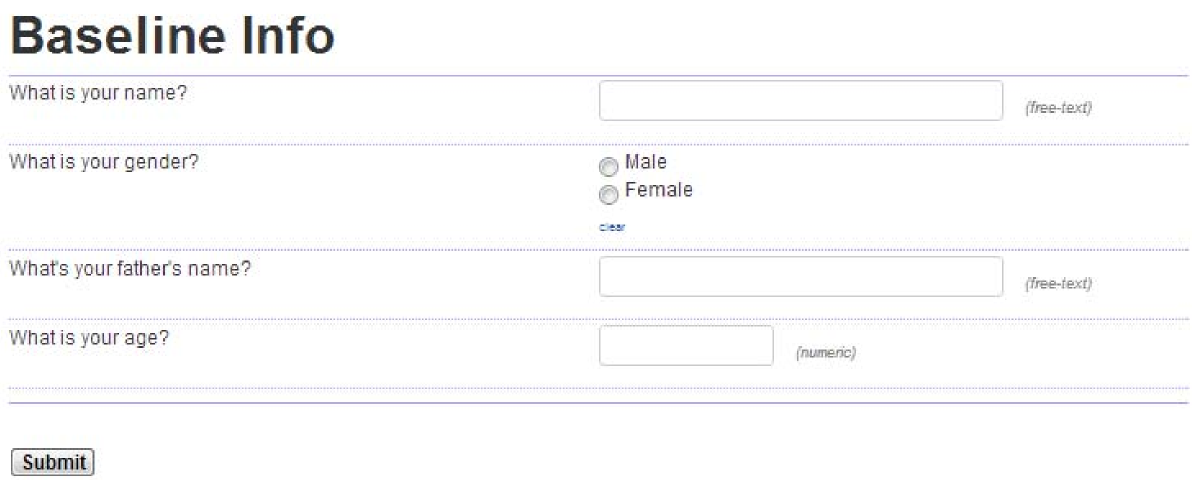
Once within the system, the left side will list the applications and modules you've defined. Selecting one of the modules will display the assigned questionnaires and participants for that call center operative.



Clicking on a participant will expose a button to enter the questionnaire for them.



The system will then display the questions for the user. Once all the questions are filled out, the Submit button can be used to send the results. The entry for that particular person will be removed from the list.



Exporting Data

Data in the system is structured in the following way:

- **Cases**: These contain the list of contacts/participants in the system. The name of this export is specified when creating the module. For example, if you named the case type "participant" for a module, there will be an export called "participant" that contains the list of all contacts who responded to questionnaires/forms in that module.
- **Forms**: The responses to each questionnaire are available through a form export. This export will also mark whether a survey was completed fully or only partially completed. This also includes the incentives associated with that survey and contact.

Additional details on data export from the system can be found here:

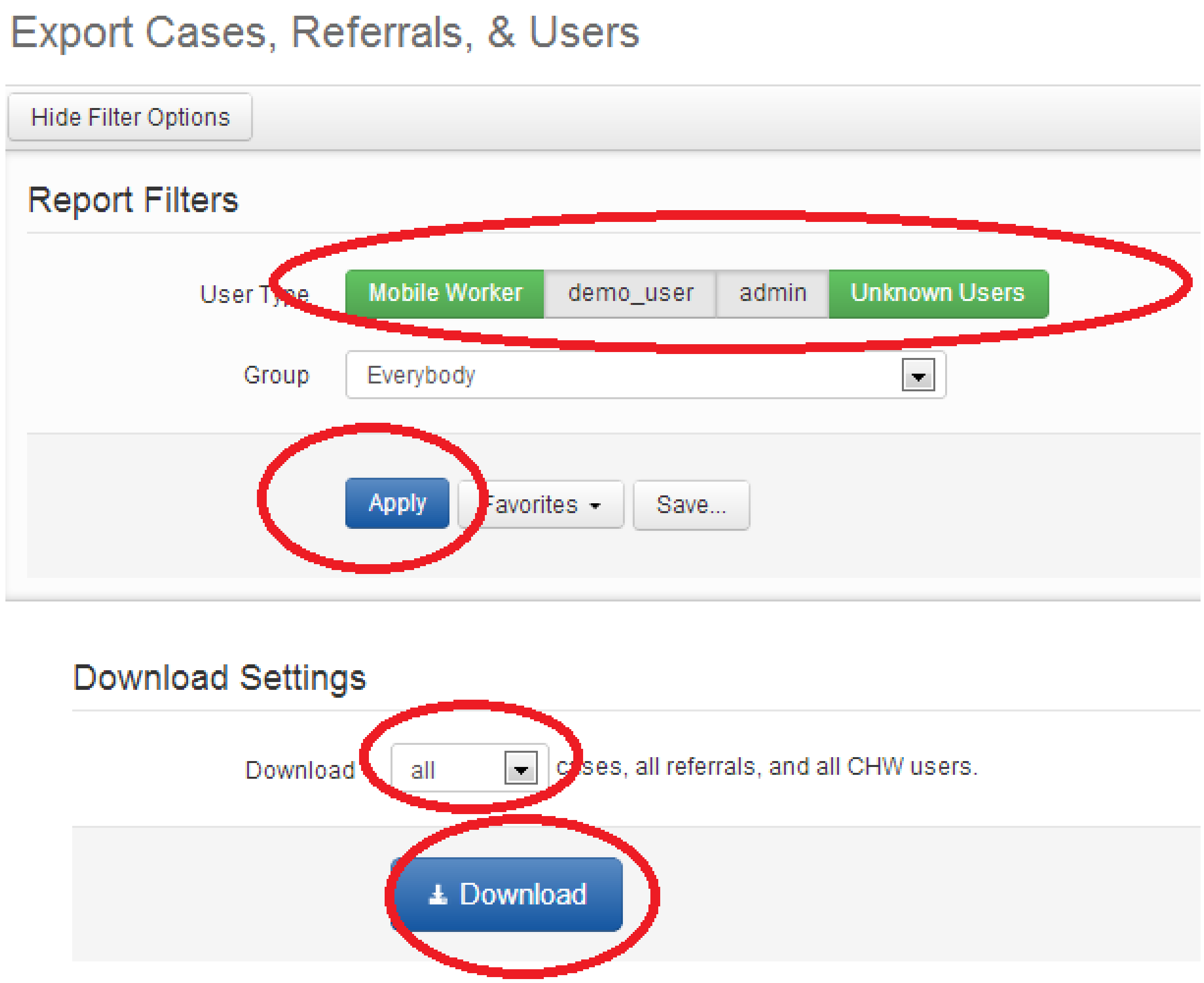
https://confluence.dimagi.com/display/commcarepublic/Monitoring+Your+Project

This also includes information on creating scheduled and email reports, monitoring worker performance and viewing all the data sent to the system.

Participant List Export

To export cases (the list of participants), navigate to the "Reports" tab and select "Export Cases, Referrals & Users". This page allows you to filter the data that is exported. First choose "Mobile Workers" and "Unknown Users" at the top of the screen and click the "Apply" button. This will include data from both Mobile Workers (your call center users) and Unknown Users (data coming in from SMS).

To download the participant list, the simplest option is to choose the "Download [all] cases, all referrals and all CHW users" option.



This will export a list of all cases in your system. In the resulting export, you will need to filter the column "type" to the case type specified in your module (ex. "participant").

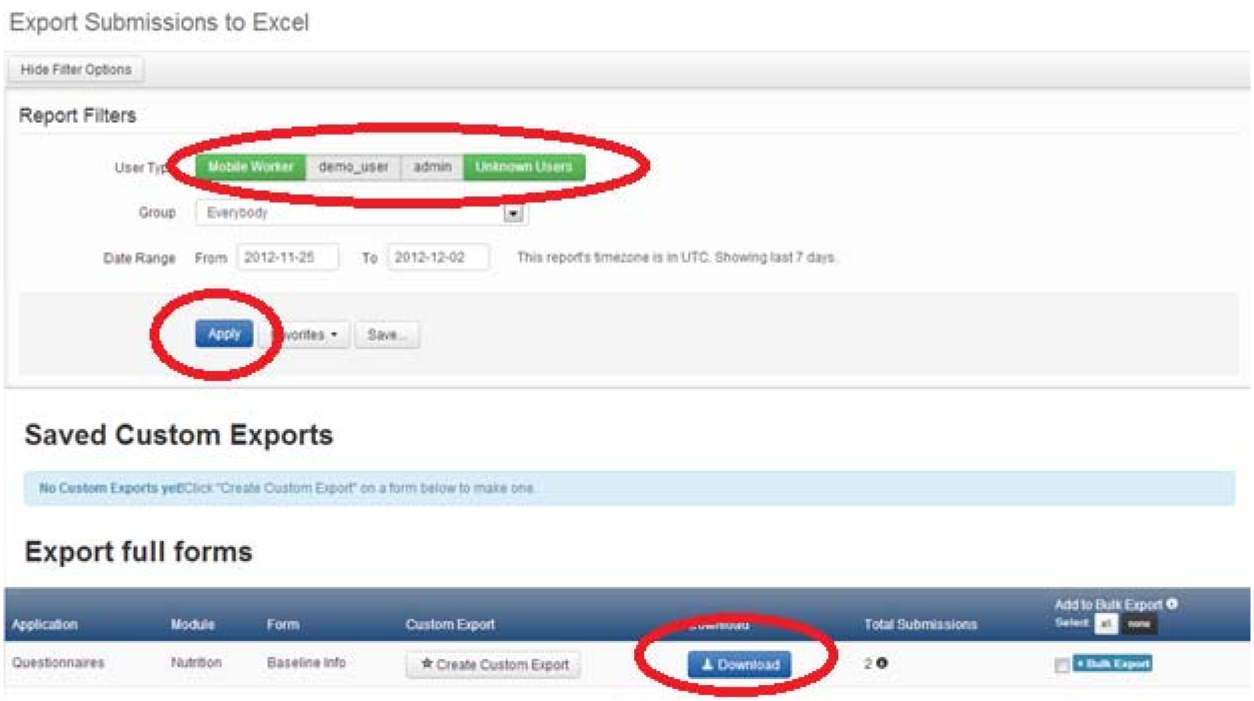
The following columns are important:

1. **case_id**: This is the identifier for a given contact. It can be used to identify a given contact across a number of questionnaires.
2. **d.contact_phone_number**: The phone number of the contact

Note: This export will only contain the list of participants **for whom a questionnaire has been submitted.**

Form/Questionnaire Export

To export forms, navigate to the "Reports" tab and select "Export Cases, Referrals & Users". This page has some options on filtering the data that is exported. You can choose the date range of form submissions you'd like to download. Similarly, make sure you have "Mobile Worker" and "Unknown Users" selected and click the "Apply" button.



The simplest option is to select the date range you care about and choose the "Download" button for the appropriate form. Within this export, the following columns are important:

1. **form|case|@case_id**: This is the identifier to map a given submission to a particular contact (from the participant list export).
2. **partial_submission**: This identifies whether a particular form was fully completed (for SMS forms).
3. **form|meta|deviceID**: This specifies whether the form was submitted by a call center user or through SMS. The value "cloudcare" refers to call center and "commconnect" refers to SMS.
4. **form|meta|timeStart** and **form|meta|timeEnd**: This specifies when the questionnaire was started and completed
5. **form|meta|username:** The username of the call center user for call center submissions
6. **form|<question_id>:** There will be a number of these entries that specify the different questions in the form.
7. **survey|incentive:** The incentive for the survey for the particular participant.

It is also possible to create custom export that only contains the columns that are required for analysis.