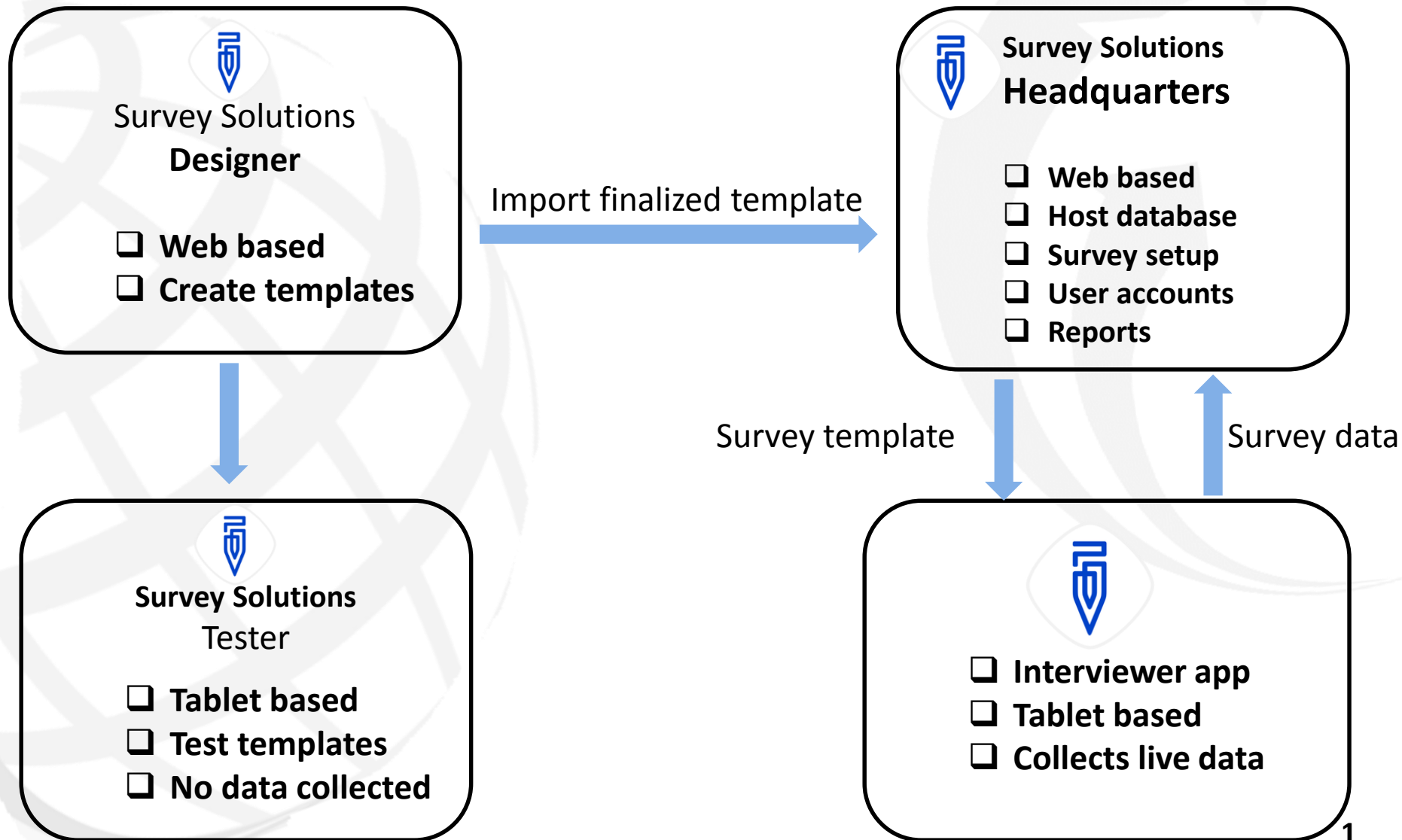


Survey Solutions CAPI Workflow



Designer and Tester

One web address and one account for all of your projects and surveys

Headquarters

Different web address and login details for each **Project**

- But within each project you can have multiple surveys

Interviewer

Same application but different login for each project

- Links with one headquarters at a time
- Can have multiple surveys on one tablet

Introduction to the Designer tool

<https://designer.mysurvey.solutions>



Survey Solutions Designer

A collaborative tool to create questionnaires
for the World Bank CAPI/CAWI platform.

Welcome to Survey Solutions Questionnaire Designer

Please log in or [Register](#)

- ☐ Show Password
- ☐ Stay logged in for a day

LOG IN

[FORGOT PASSWORD?](#)



Survey Solutions **Designer**

A collaborative tool to create questionnaires
for the World Bank CAPI/CAWI platform.

Register



I'm not a robot



reCAPTCHA
[Privacy](#) • [Terms](#)

REGISTER

[LOG IN](#)

[FORGOT PASSWORD?](#)



My Questionnaires

https://designer.mysurvey.solutions

Survey Solutions | Designer

MY QUESTIONNAIRES | QUESTIONNAIRES SHARED WITH ME | PUBLIC QUESTIONNAIRES | CREATE NEW

HELP | HI, ADBSOLUTIONS

TITLE	MODIFIED ON	CREATED ON	CREATED BY
-------	-------------	------------	------------

This list does not contain any records



Relational Operators

Operator	Meaning
==	Is equal to
!=	Is not equal to
>	Is greater than
>=	Is greater than or equal to
<	Is less than
<=	Is less than or equal to

3.2 Logical operators and multi-select questions

Logical Operators

Operator	Meaning
&&	AND
	OR
!	Not

Multi Select Operators

Operator	Meaning
.Contains()	This answer is amongst those selected
.ContainsOnly()	Only this value is selected
.ContainsAll()	All of these values are selected
.ContainsAny()	Any of these answers are selected
!.Contains()	This answer is not amongst those selected
.Length	Counts how many answers selected

3.3 System generated variables

System Generated Variables

Operator	Meaning
Self	References the current question
@rowcode	Specifies a row ID in roster
@optioncode	Specifies an option code in single or multi select question
@current	Refers to the current row being completed in a roster

3.4 LINQ expressions

LINQ expressions

Operator	Meaning
All	Checks if condition is true for ALL roster rows
Any	Checks if condition is true for ANY roster rows
Count	Returns a count of how many times the condition is true in roster

Example:

ROSTERNAME.OPERATOR($x \Rightarrow x.VARIABLE$ CONDITION)

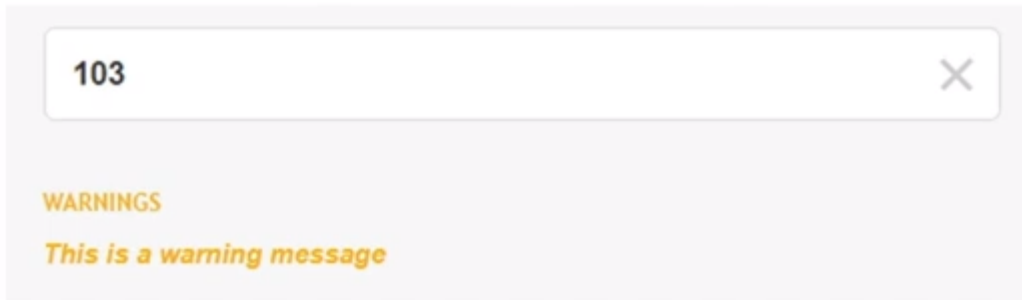


Enabling conditions for rosters

4.1 Introduction to validations

Error Messages and Warnings

- Warning messages display on orange



103

WARNINGS

This is a warning message

- Error messages display in red



203

ANSWER IS INVALID

This is an error message

4.3 Date validations

Operator	Meaning
== or !=	<p>Dates are the same or not the same</p> <p>For example: Date1 !=Date2 – two things cannot take place on the same day.</p>
<, >, >=, <=	<p>Relational operators</p> <p>For example: Date1 > Date2 – Date 1 is later in time than Date2</p>
FullYearsSince	<p>Returns a numeric number of years between two dates</p> <p>For example: Date1.FullYearsSince(Date2)</p>

4.4 Common validations for social research

LINQ expressions

Operator	Meaning
All	Checks if condition is true for ALL roster rows
Any	Checks if condition is true for ANY roster rows
Count	Returns a count of how many times the condition is true in roster

Example:

ROSTERNAME.OPERATOR($x \Rightarrow x.VARIABLE$ CONDITION)

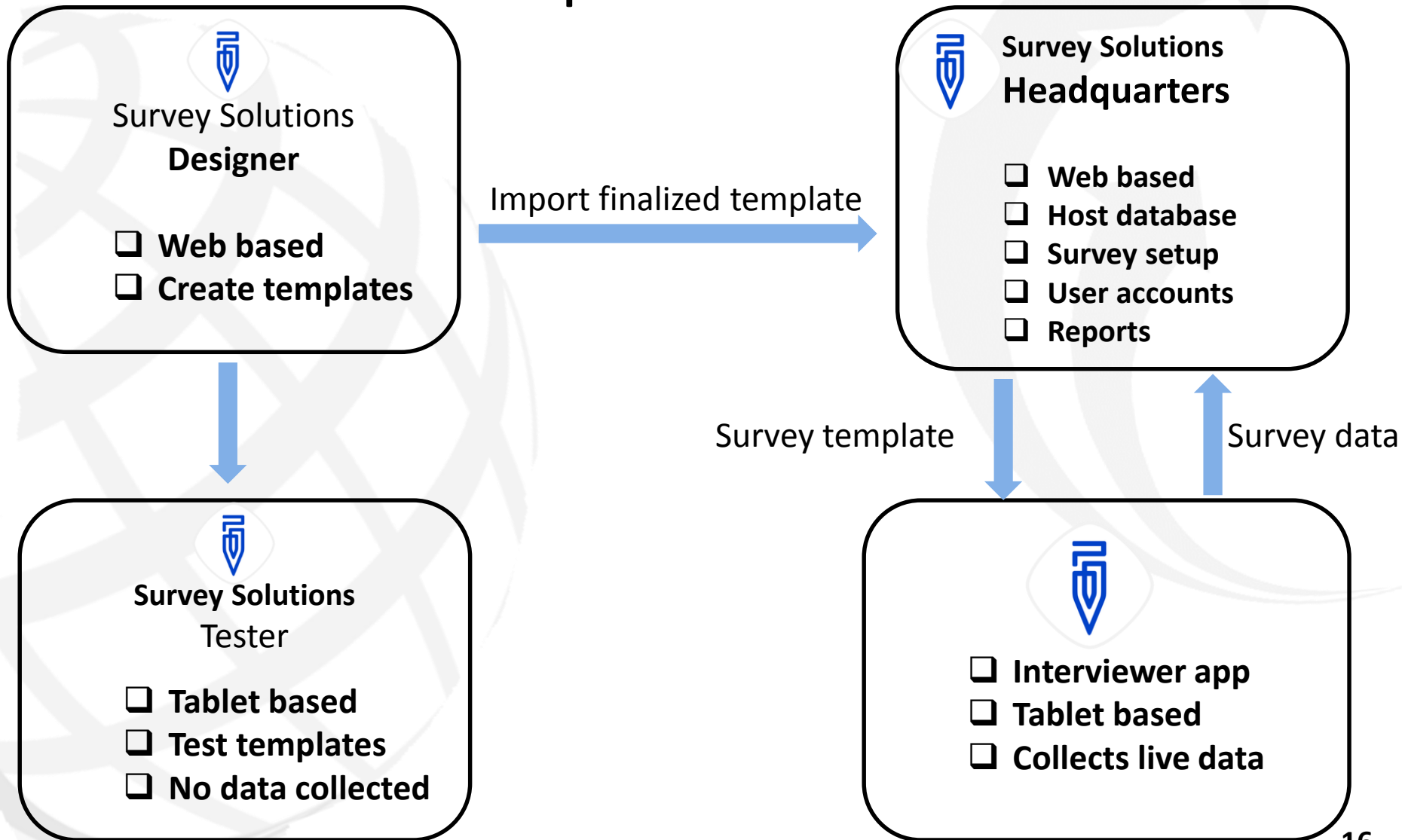


4.5 Cascading combo lists



Testing applications using the designer and tester applications

5.1 Introduction to Headquarters



Server Types

- **World Bank Cloud (recommended)**

East to set up

Data sorted securely on World Bank servers

- **Local Server**

Set up on your own server in country

Difficult to set up

Requires internet connected server

Demo Server

- Use a browser to enter <https://demo.mysurvey.solutions/>

Enter the following credentials:

Login : HeadquartersI

Password: HeadquartersI



5.2 Multi-language survey

5.3 Setting up user accounts

Components of Survey Solutions

- Headquarters (HQ)
 - Highest level of access
 - Roles:
 - Import questionnaire to the server
 - Create supervisor and interviewer accounts
 - Assign questionnaires to supervisors/interviewers
 - Accept/reject forms
 - Track overall progress of the survey

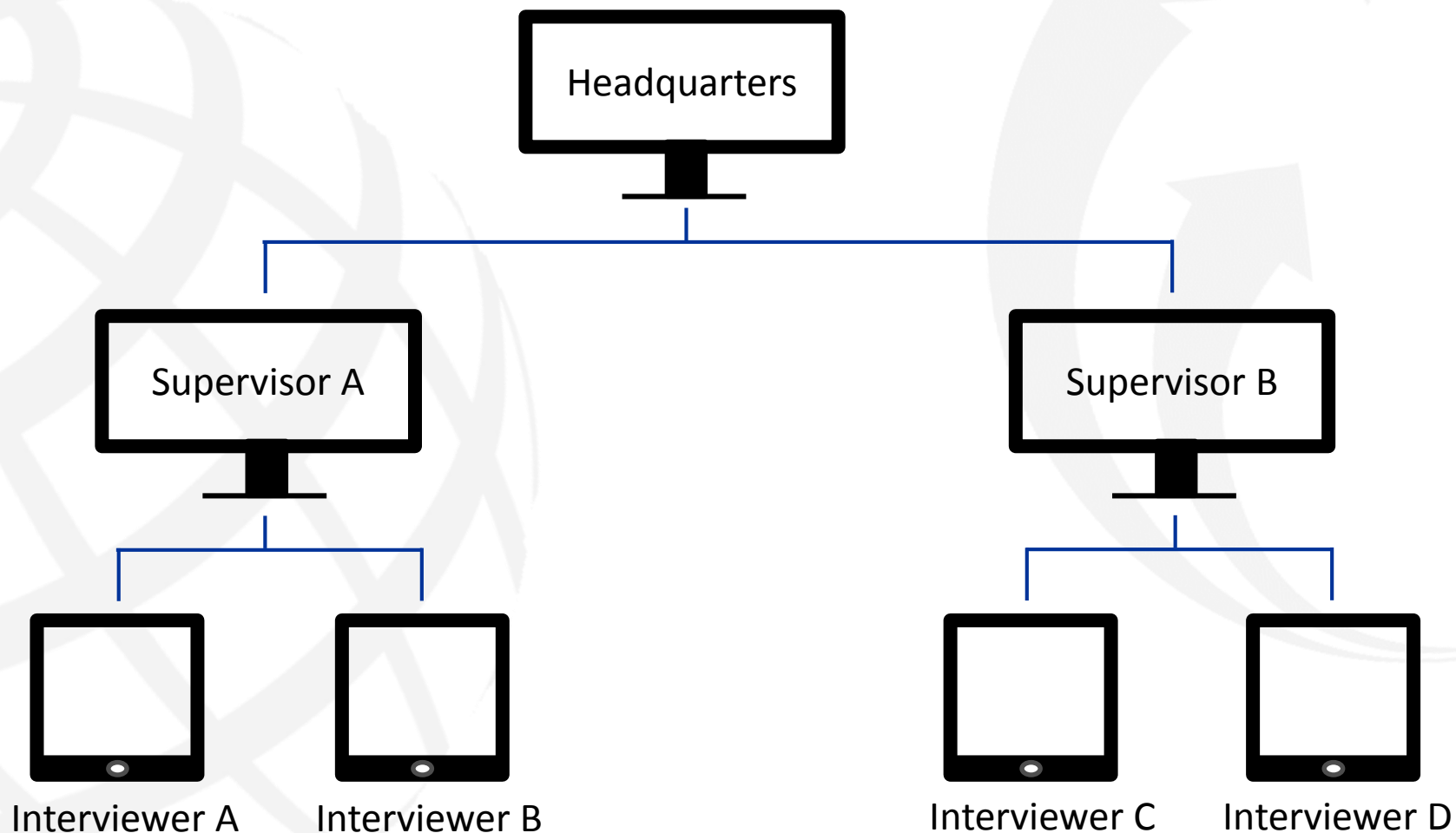
Components of Survey Solutions

- Supervisors (SV)
 - Mid-level access
 - Roles:
 - Assign questionnaires to interviewers
 - Accept/reject forms
 - Track general progress of the survey

Components of Survey Solutions

- Interviewers (IV)
 - Data collectors
 - Roles:
 - Complete forms
 - Send completed forms to supervisors

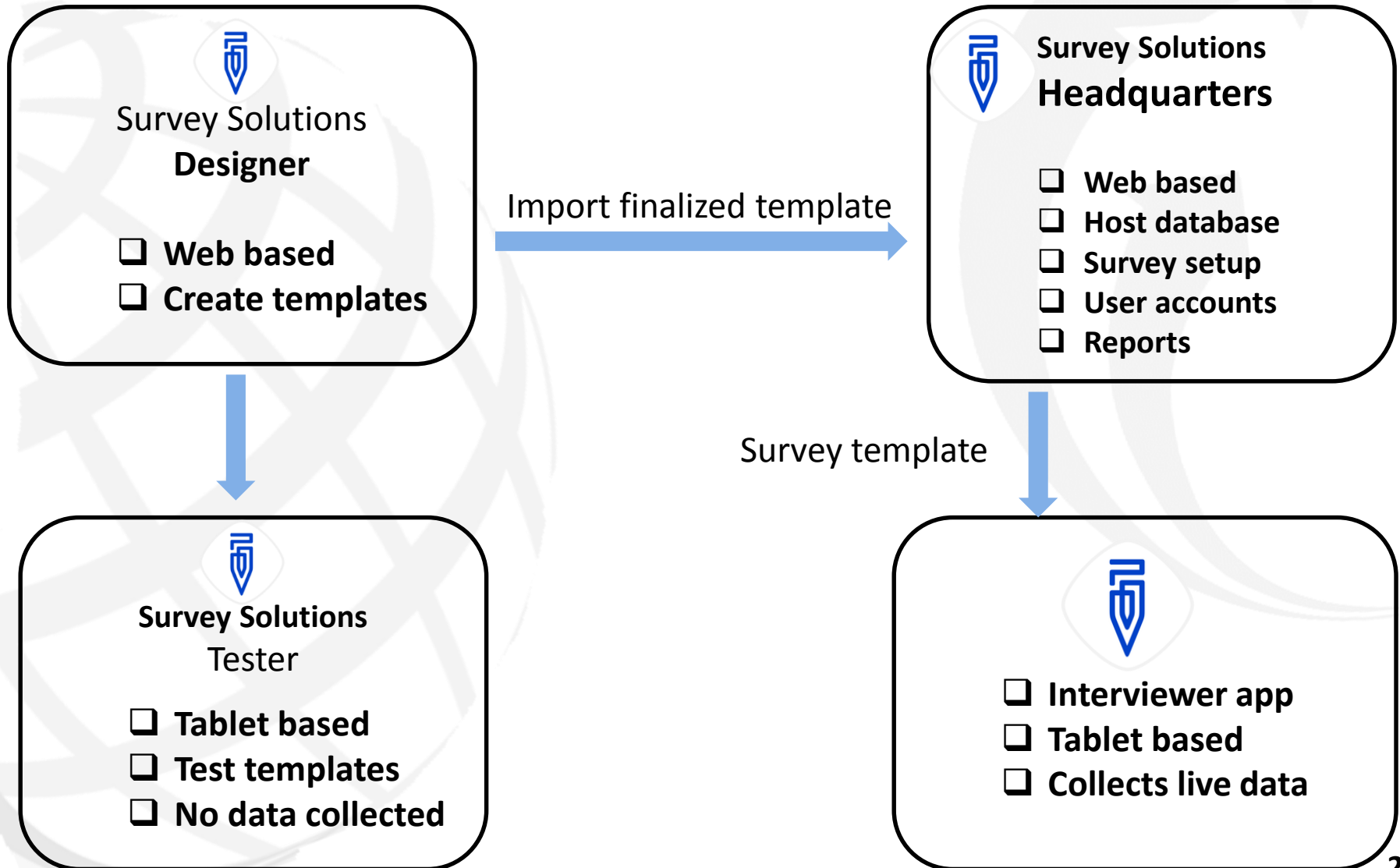
User Levels





5.4 Setting up interview application on tablets

5.5 Importing the questionnaire to headquarters and creating assignments





5.6 Collecting data on the interviewer app and synchronizing



6.1 Introduction to Quality Control (QC)

Data Flow

6.2 Approving and rejecting cases

What to Check?

- Unanswered Questions
- Questions with errors
- Questions with warnings
- Open Ended Questions

Rules to apply

- Never permitted
- Permitted with a valid interviewer comment
- Permitted with discretion of QC

Example 1

- If the questionnaire has exhaustive answers for all questions
 - For example: Gender
 - Male
 - Female
 - Prefer not to answer
 - Then rule might be
 - Missing answers are never allowed

Example 2

- If the questionnaire does not have exhaustive option for all
 - For example: Gender
 - Male
 - Female
 - Then rule might be: missing answers are permitted if an interviewer comment is included
 - “Respondent refuses to answer this question”

Example 3

- Error messages are used when an answer is truly impossible
For example: Age < 120, you could make a rule that says
“Red error messages are never permitted”
- OR for very unlikely but possible answers
For example: Age < 105, you could make a rule that says
“Red error messages are permitted with an interviewer comment”

6.3 Working example of case flow

6.4 Headquarters reports and metadata

6.5 Updates to questionnaires after fieldwork has started

7.1 Question Scope

Interviewer

These are normal question types like the ones we have been creating for the interviewer to complete. The default question scope is ***interviewer***.

Identifying

Questions defined as ***identifying*** supplies 'driving directions' for the enumerators. Answer can be pre-located. Some examples are: province, household id, household address, national identification number and name of the household head.

Supervisor

These are questions for the supervisor and/or headquarters to complete. For this reason, these questions are not displayed on the tablet.

Hidden

Questions not visible to the interviewer which have pre-loaded answers to be used in validations and enabling conditions. Examples are pre-loaded respondent information for re-contact type surveys.



7.2 Timestamps

7.3 GPS and geography questions

7.4 Computer Assisted Web Interviewing (CAWI)

Web Interview – Scenario 1

You have one contact person who will distribute your survey link for you

1. Set up one supervisor account and one interviewer account.
2. Create one assignment for that interviewer with quantity – 1

Web Interview – Scenario 2

You have a list of emails and maybe names or other identifying information

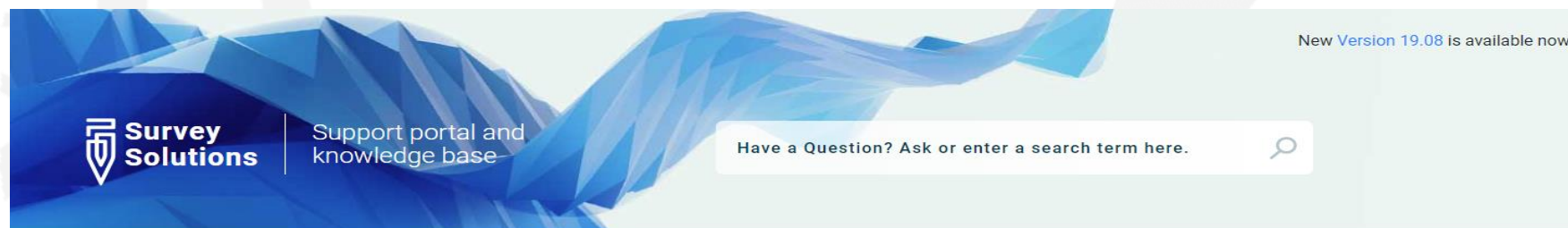
1. Set up one supervisor account with an interviewer account for each name in your list of potential respondents
2. Create a hidden question in the designer for name, email or other identifying variables
3. Create an assignment for each interviewer account with quantity 1 and populating the hidden variables with relevant information **(for example:name)**

7.5 Using variables and randomization in the designer tool



8.1 Support Portal

- <https://support.mysurvey.solutions/>



Getting Started

Overview: Printable materials
Instructions for respondents to Web Sur...
FAQ for IT personnel
Implementing a CAPI survey with Survey...

6 Articles >



FAQ

Tablet manufacturers
Support checklists
Scalability of Survey Solutions
Cloud server request

45 Articles >

Syntax Guide

Section functions
Syntax Guide: Filtered Answer Options
Syntax Guide: Multi-select questions
Syntax Guide: List questions

15 Articles >

User Forum

Welcome to our forum
Default value in a variable when a sectio...
Assignment Information
Filter multi-select from linked multi-select

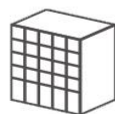
950 Topics >



Questionnaire Designer

Sharing a questionnaire
Tabular presentation of rosters
Variable names
Survey Solutions Limits

58 Articles >



Headquarters

Server Audit Log
Admin Settings
Standalone Server
Standalone Installation

53 Articles >



Supervisor

Supervisor App
Reassign an Interview
Distribute an Assignment
Manage Interviewer Accounts

9 Articles >



Interviewer

Interviewer App Notifications
Password Best Practices
Interviewer Password Reset
Set up an Interviewer tablet by scanning ...

21 Articles >

8.2 System updates and new features

8.3 Contacting Support

- <https://support.mysurvey.solutions/>
- Only contact Support if you are working on a real, live project

System outage

- Headquarters is not accessible (**offline**)
- Error when trying to login (**check your password**)
- For the Designer, system sometimes goes down for maintenance or technical problems

Technical Issue/Error

- Can be encountered in the Designer, Tester, Headquarters and/or Interviewer applications
- Contact Support **ONLY** if you have already checked thoroughly for the answer in the portal
- **AND** if you have posted a user question and have not received a reply
- **OR** issue is very urgent (**will affect fieldwork**)