



# **NubiS**

# **Supervisor Manual**

**Version 1.1**

**August 2016**

# Preface

Supporting every successful survey is a strong data collection tool.

At the University of Southern California's Center for Economic and Social Research (CESR), we have developed NubiS, accessible and versatile software for administering a questionnaire. NubiS:

- Runs on any server, PC, laptop or netbook, as well as on Android tablets or smartphones.
- Works with surveys that are face-to-face, via telephone and self-administered (*i.e.*, all traditional modes of data collection).
- Can be used in a number of languages.

Following NubiS' development in 2014, it has been the foundation of CESR's Understanding America Study, a panel of thousands of households representing the entire United States. NubiS also has been used in several large-scale longitudinal surveys and other projects around the world.

You, as supervisor, want a survey that lets you fulfill your duties with a minimum of fuss. We think you will find NubiS provides the underpinnings for data collection of breadth and depth while remaining user-friendly to you and your interviewers.

This manual is the document's second version, supplanting the initial release distributed in Summer 2015.

NubiS is free software; it may be redistributed and/or modified under the terms of the GNU Lesser General Public License, version 2.1 and later, as published by the Free Software Foundation.

For more information, feel free to contact us. CESR also can help with access to the Understanding America Study's panel, as well as providing assistance for survey hosting, design and management.

We're proud NubiS can support the quest for greater knowledge and wish you the best with your surveys.

Sincerely,

The NubiS team

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# 1. Supervisor

On the first screen that appears enter your supervisor username and password to login.

Haalsi SMS

Please enter your username and password to log in.

Username

Password

Login

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After you log in, you will see an overview of the interviewers for whom you are responsible. The screenshot below shows the interviewers that supervisor 1 is responsible for.

Haalsi SMS

Interviewers

Sample

Unassigned Sample

Reports

Search

Supervisor 1

Interviewers

Urid	Name	Username	# Contacts	# Completed	# Refusal	Last upload
6	<a href="#">iwer1</a>	1	22	0	1	2014-09-10 03:15:41
8	<a href="#">iwer2</a>	2	18	0	0	
9	<a href="#">iwer3</a>	3	22	0	0	
10	<a href="#">iwer4</a>	4	6	0	0	
11	<a href="#">iwer5</a>	5	10	0	0	
12	<a href="#">iwer6</a>	6	0	0	0	

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Clicking on any interviewer brings up more information, as well as allowing you to set a filter on the households and respondents this interviewer must visit and interview.

Haalsi SMS

localhost/haalsi/index.php

Haalsi SMS Interviewers Sample Unassigned Sample Reports

Search Supervisor 1

Interviewers / iwer1

All Completed Resisting Non sample Incompletes Needs Validation Moved out Suspect

Household(s)/Respondent(s) assigned to interviewer 'iwer1':

Household id	Name	Dwelling	Village	Last contact	Status	Refusal	Validation
BZTBC	Eckson Machave	0038	MP Stream	500	none	no	
DSVDD	Enny Mambane	0518	MP Stream	500	completed	no	
JZZJG	Phillis Mabunda			none	none	no	no
BQQXE	Andzisani Mabunda			none	none	no	no
GJHKF	Jane Mabunda			none	none	no	no

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The filters available are:

- **All:** Households and respondents attached to this interviewer.
- **Completed:** Households in which all respondents participated.
- **Resisting:** Households (or that have members) refusing to participate.
- **Non sample:** Households (or that have members) that cannot be located.
- **Incompletes:** Households that are not yet completed.
- **Needs validation:** Households with members for whom the survey needs to be validated.
- **Moved out:** Households with members who have moved out but should be interviewed.
- **Suspect:** All interviews where the system detected an abnormality in the survey.

On this screen, you also can select a household or respondent to view more details and leave remarks for the interviewers. (See the **Interviewer Manual** for more details.)

The screenshot shows the Haalsi SMS web application interface. The browser address bar displays 'localhost/haalsi/index.php'. The application has a navigation bar with tabs: 'Haalsi SMS', 'Interviewers', 'Sample', 'Unassigned Sample', and 'Reports'. A search bar and 'Supervisor 1' dropdown are on the right. The main content area shows the 'Interviewers / iwer1 / Household' view. It displays details for a household member: Name: Eckson Machave, Status: none, Dwelling: 0038, # of contacts: 0, Village: MP Stream. Below this, it shows contact information: Telephone: 0729431776, PSU: MP Stream, GPS: lat: -2743075.659, lon: 19585.152. A blue box labeled 'HH members' lists 'Eckson Machave (M) 54'. On the right, a sidebar titled 'Household BZTBC' contains links for 'info', 'Contacts', 'History', 'Remarks', and 'Edit'. At the bottom, there are two action buttons: 'Assign to different interviewer' with a dropdown menu showing 'iwer1' and a 'Reassign' button, and 'Assign final contact status' with a 'Select' dropdown and a 'Set status' button. The footer shows '© USC CESR - 2015'.

At the bottom of the screen, there are options to assign this case to a new interviewer and to assign a final contact status. Options here are:

- **502:** Final refusal
- **503:** Final non contact
- **504:** Final non sample

A final code of **500** will be assigned to all cases where a survey has been completed. At the end of the fieldwork, every case should have a final code attached to it.

On the right side, more information on the household or respondent can be requested.

For more information see the *Interviewer Manual*.

Only the respondent information screen has an option to assign a final contact status. Individual respondents cannot be moved to a different interviewer, only the household as a whole (including all respondents). Before moving a household, make sure the interviewer has returned the latest data to the server.

Haalsi SMS

localhost/haalsi/index.php

Haalsi SMS Interviewers Sample Unassigned Sample Reports

Search Supervisor 1

Interviewers / iwer1 / Household / Respondent

Respondent JZZJG

info

Contacts

History

Remarks

Edit

Name: Phillis Mabunda Status: none

Dwelling: 0518 # of contacts: 0

Village: MP Stream

Telephone: 0796243106

PSU: MP Stream

Sex: Female

Age: 41

Individual survey: Yes

Assign final contact status Select Set status

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Under the **Sample** tab, you can see the whole sample (independent of the interviewers).

Haalsi SMS

localhost/haalsi/index.php

Haalsi SMS Interviewers Sample Unassigned Sample Reports

Search Supervisor 1

Sample

All Completed Resisting Non sample Incompletes Needs Validation Moved out Suspect

Household(s)/Respondent(s) assigned to interviewer "Supervisor 1".

Household id	Name	Dwelling	Village	Last contact	Status	Refusal	Validation
<a href="#">BZTBC</a>	Eckson Machave	0038	MP Stream	none	none	no	
<a href="#">DSVDD</a>	Enny Mambane	0518	MP Stream	500	completed	no	
<a href="#">JZZJG</a>	Phillis Mabunda			none	none	no	no
<a href="#">BQQXE</a>	Andzisani Mabunda			none	none	no	no
<a href="#">GJHKF</a>	Jane Mabunda			none	none	no	no

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All options are identical as described above.

On the **Unassigned Sample** tab, you can assign households to an interviewer.

Haalsi SMS

localhost/haalsi/index.php

Haalsi SMS Interviewers Sample **Unassigned Sample** Reports

Filter on psu All psus Show

id	Name	Dwelling	Village
<input type="checkbox"/> CCTTR	Noah Khosa	0067	MP Stream
<input type="checkbox"/> CREMY	Linah Mokoena	0266	MP Stream
<input type="checkbox"/> JONRX	Solomon Dlamini	0476	MP Stream
<input type="checkbox"/> DZHWY	Elson Mabunda	0522	MP Stream

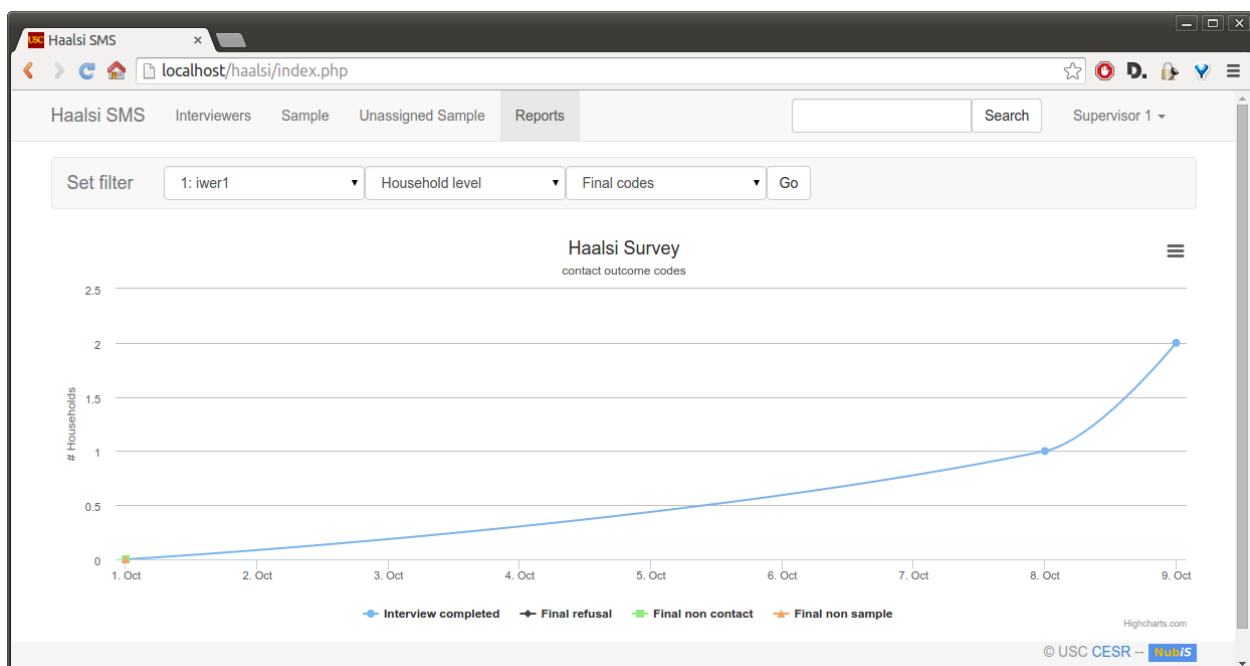
assign selected to: Select interviewer Assign

© USC CESR

Choose the individual households you would like to assign (or select them all by clicking on the checkbox next to **id**) and then pick the interviewer to whom you would like the selected household(s) assigned. The interviewer will need to click **send/receive** on their laptop before the new household is visible on their machine.

At the top of the screen, you can select unassigned samples by Primary Sampling Unit (PSU). This allows you to quickly select cases for certain interviewers.

The **Reports** tab gives an overview of fieldwork progress for your team, PSU or individual interviewer.





This report shows the final contact outcomes for Interviewer 1 for the household survey by day.

Under the **Supervisor1** dropdown menu in the top right, in **Preferences** you can specify in which region the system should be looking. Changing the region to **One region** and selecting a PSU will restrict to that PSU the overviews for the interviewer(s) and sample. If you think you are missing households or respondents, please check the filter settings.

The screenshot displays the Haalsi SMS web application interface. The browser address bar shows 'localhost/haalsi/index.php'. The application has a top navigation bar with tabs: 'Haalsi SMS', 'Interviewers', 'Sample', 'Unassigned Sample', and 'Reports'. A search bar and a 'Supervisor 1' dropdown menu are located on the right. The 'Preferences' section is active, containing two sub-sections: 'Filters' and 'Settings'. In the 'Filters' section, the 'Region:' label is followed by two buttons, 'All regions' and 'One region', and a dropdown menu currently showing 'Ireagh A'. The 'Settings' section includes a 'Survey:' label with 'Normal mode' and 'Test mode' buttons, and a 'Communication:' label with a dropdown menu showing 'Work on server'. A 'Save' button is positioned below the settings. The footer of the application indicates '© USC CESR - Haalsi SMS'.

Haalsi SMS

Interviewers Sample Unassigned Sample Reports

Search Supervisor 1

Preferences

Filters

Region: All regions One region Ireagh A

Settings

Survey: Normal mode Test mode

Communication: Work on server

Save

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