



NubiS

Interviewer 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 an interviewer, 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.

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

Table of contents

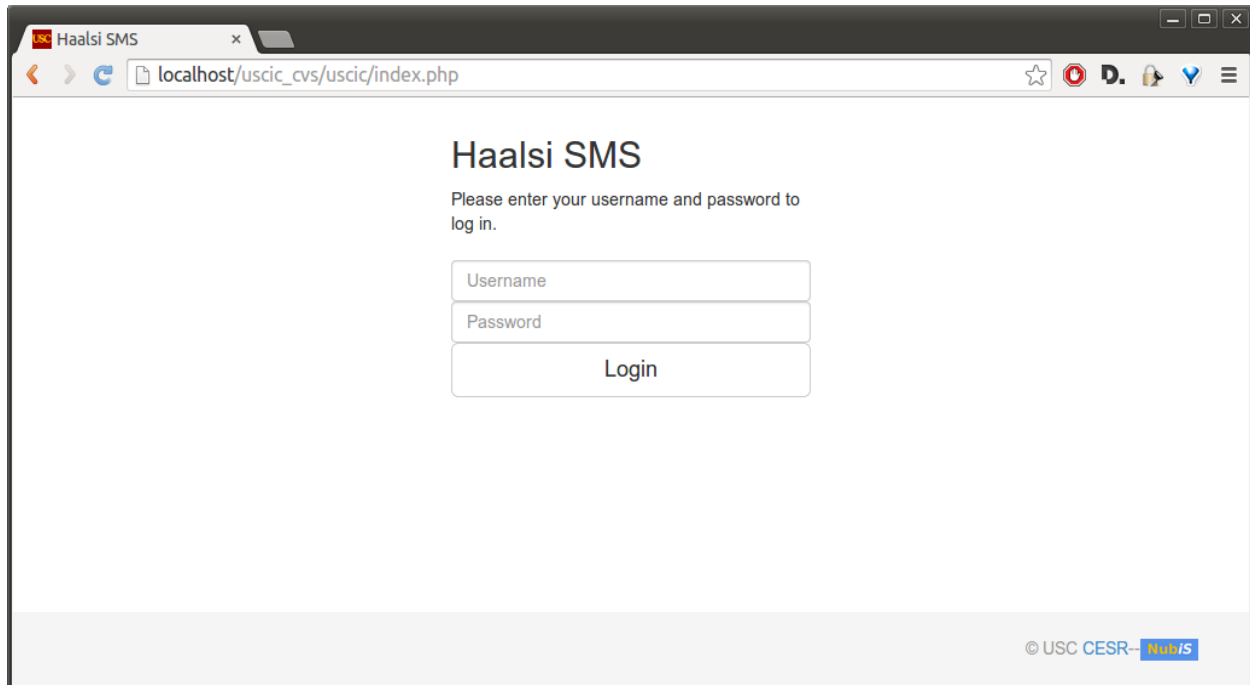
[Preface](#)

[Table of contents](#)

[1. Interviewer](#)

1. Interviewer

If you are working as an interviewer for a NubiS project, your systems administrator has provided you a website location and a username/password. To begin working, open a browser and direct it to the provided URL. You first will see the login screen:



Haalsi SMS

Please enter your username and password to log in.

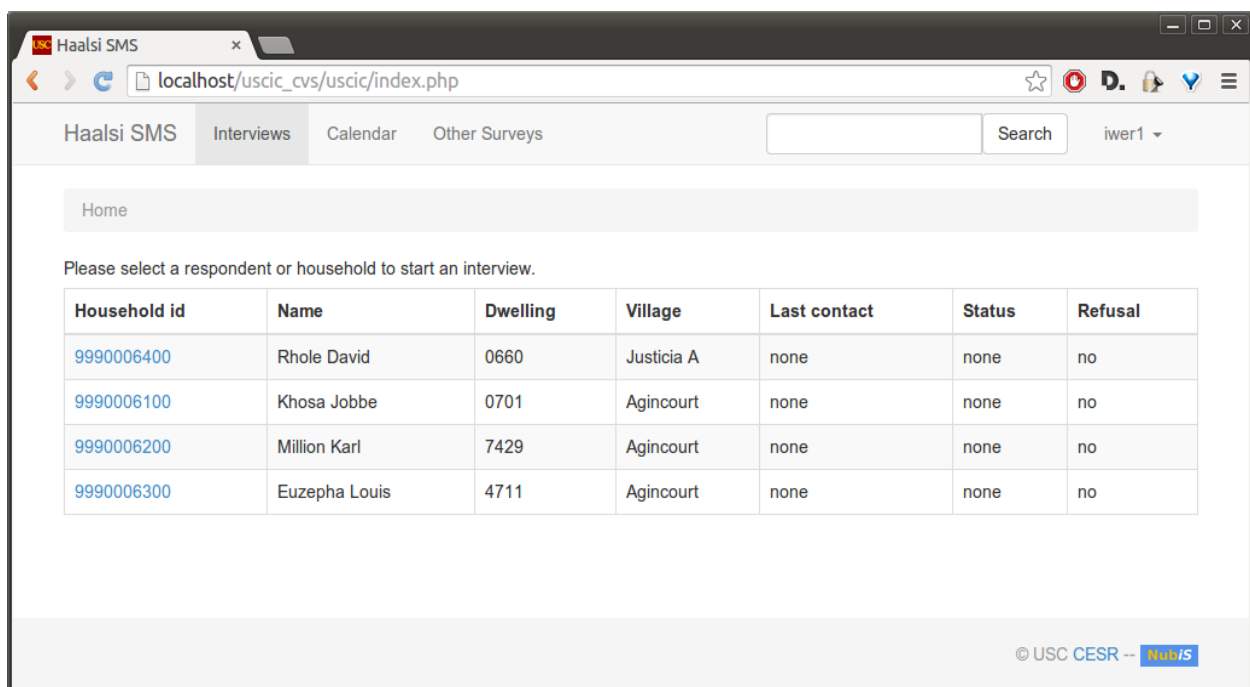
Username

Password

Login

© USC CESR - NubiS

After you log in, you will see an overview of households for you to interview. The screenshot below shows the test households with which you can try out the system.



Haalsi SMS Interviews Calendar Other Surveys

Search iwer1

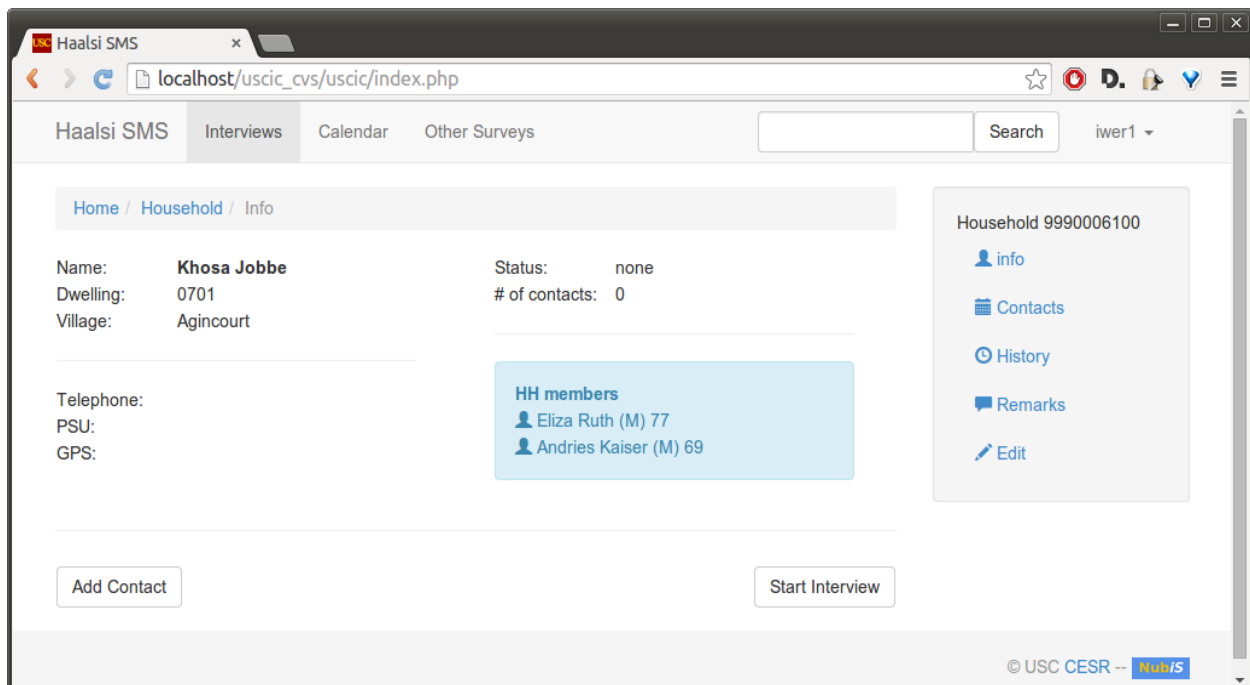
Home

Please select a respondent or household to start an interview.

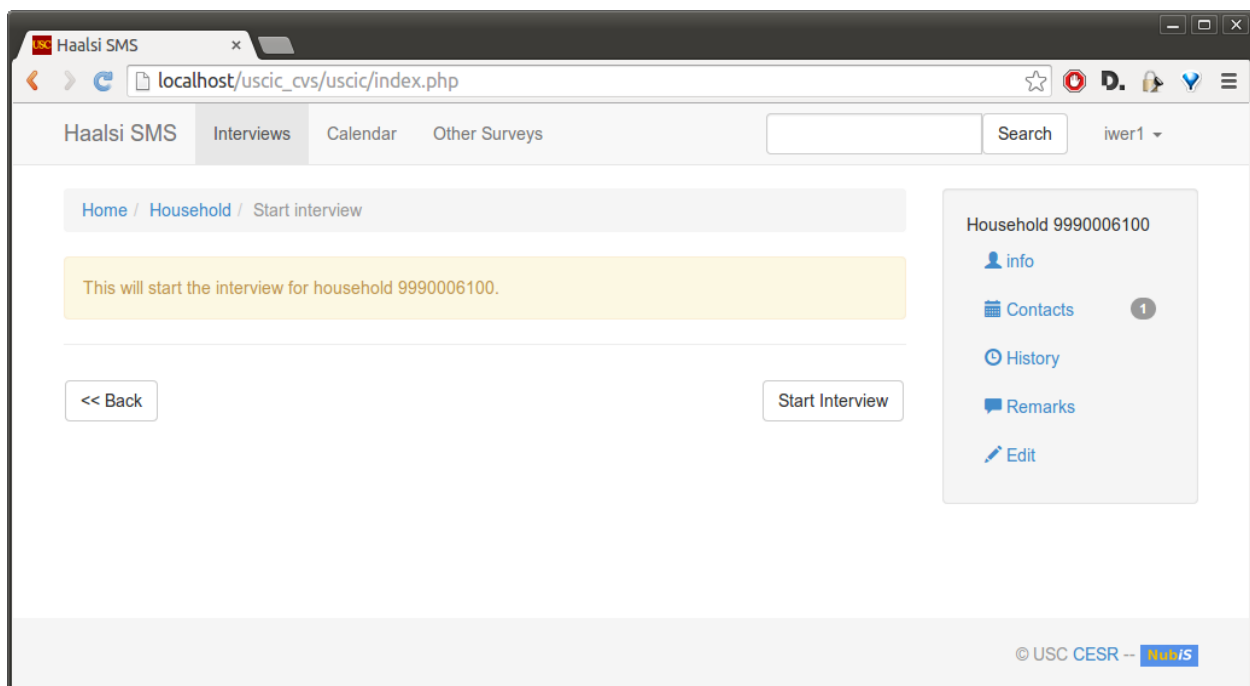
Household id	Name	Dwelling	Village	Last contact	Status	Refusal
9990006400	Rhole David	0660	Justicia A	none	none	no
9990006100	Khosa Jobbe	0701	Agincourt	none	none	no
9990006200	Million Karl	7429	Agincourt	none	none	no
9990006300	Euzepha Louis	4711	Agincourt	none	none	no

© USC CESR - NubiS

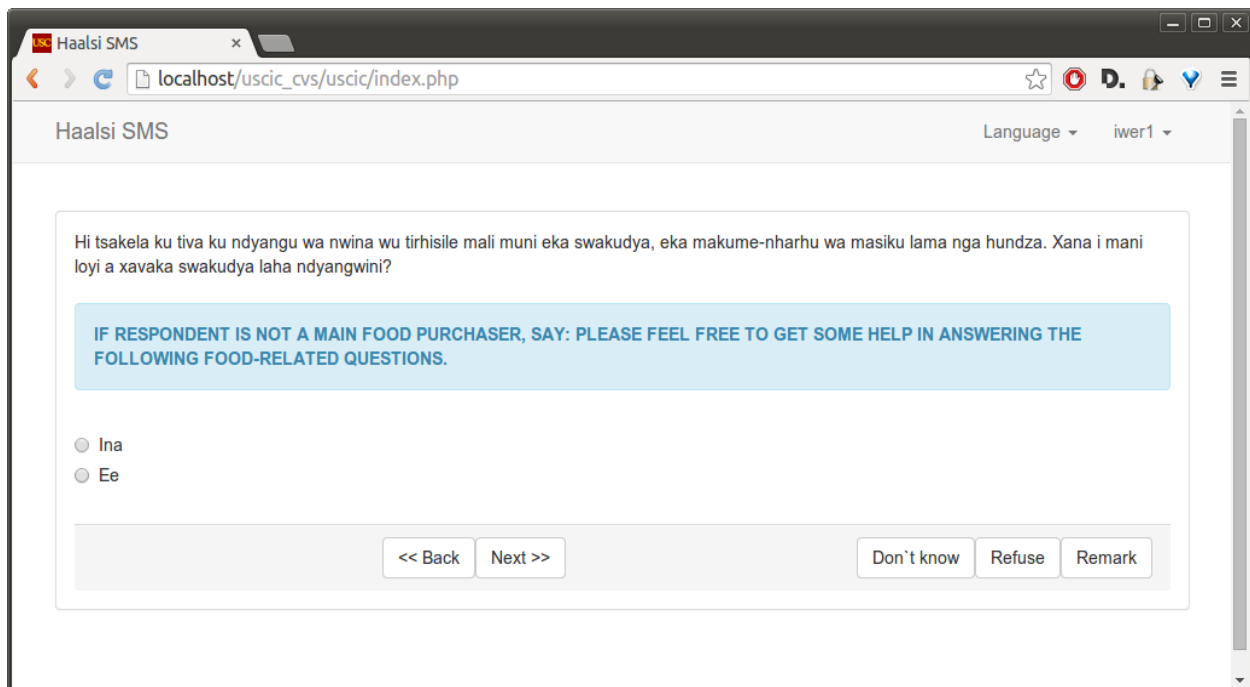
Click on any household to see more information or to start an interview.



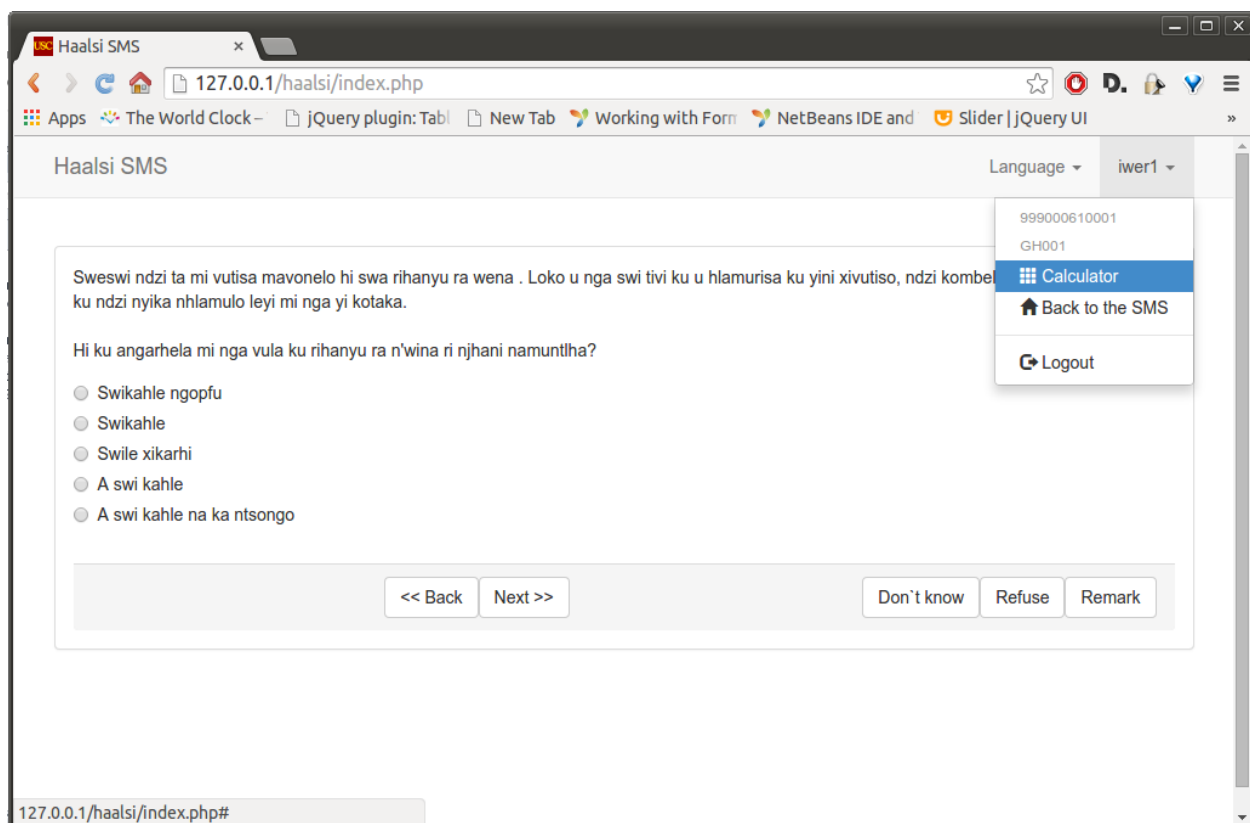
When starting an interview, the system will ask for a confirmation. Please make sure you are interviewing the right household or respondent.



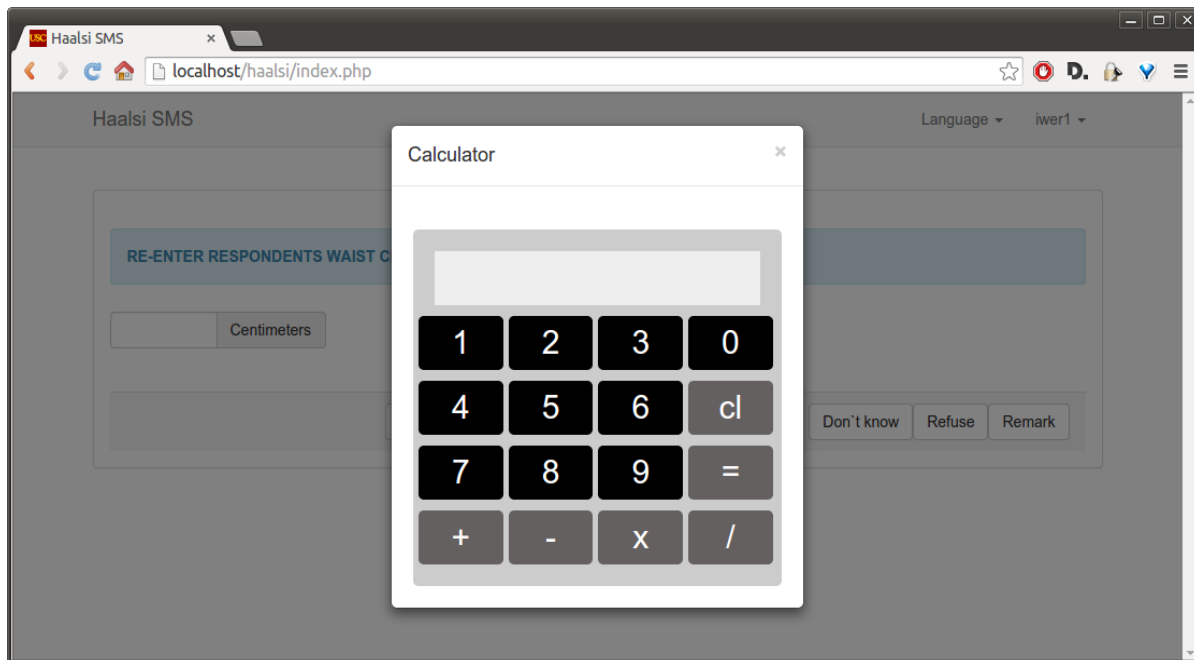
During an interview, every screen shows a question or instruction. Please read out the complete text to the respondent. After stating a question, input the answer given by the respondent. There also are options to assign **Don't know** or **Refuse** to each individual question. Comments can be left by choosing **Remark** at the bottom right of the screen.



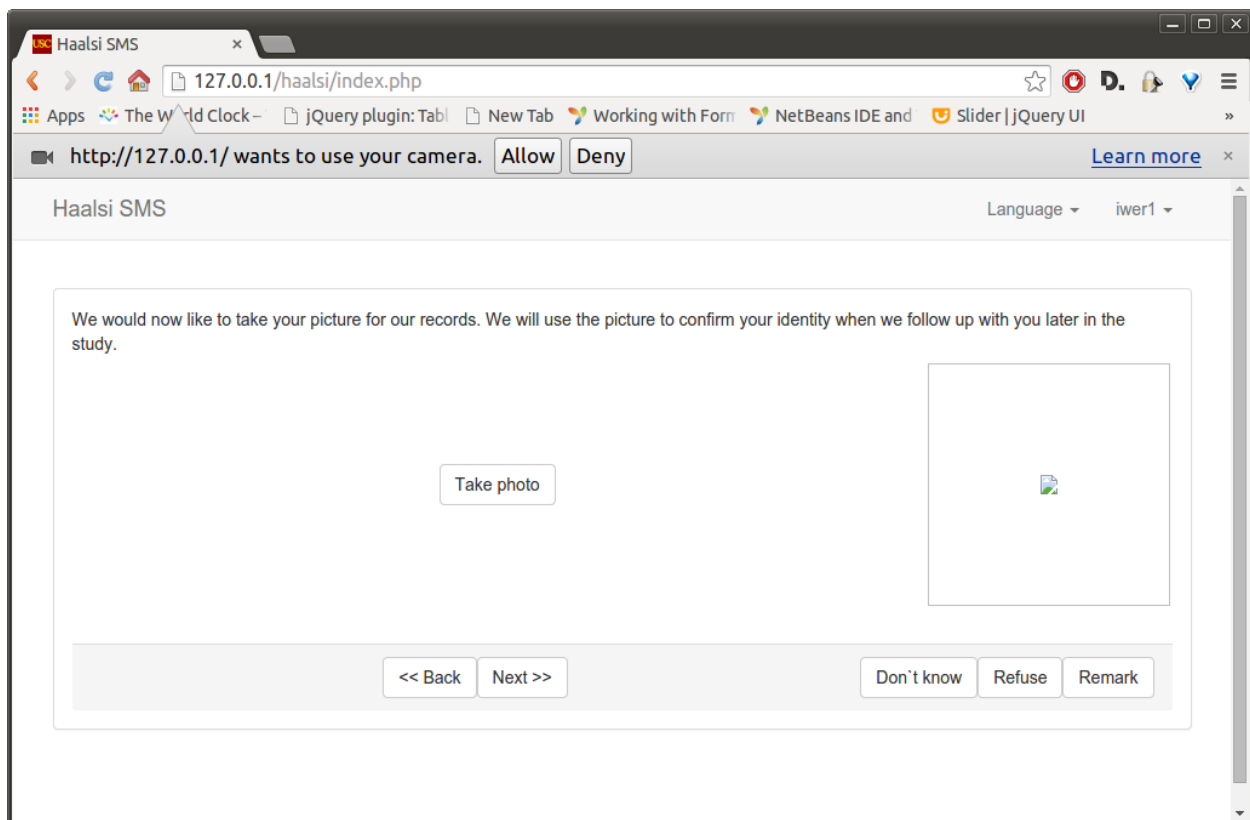
Clicking **iwer1** on the top right of the screen shows a menu where you can navigate back to the SMS. Use this when the respondent wants to complete the survey at a later time. You also can call up a calculator from the popup menu.



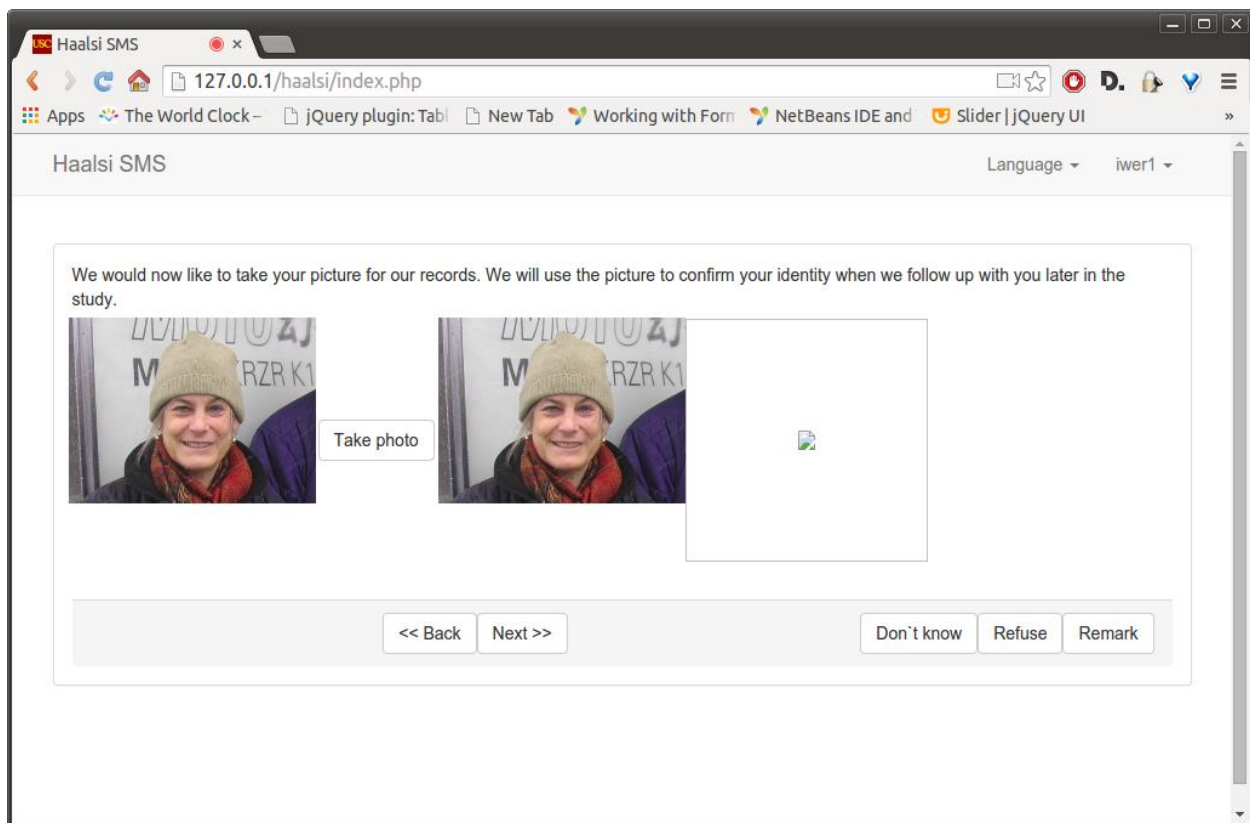
If you are done with your calculations, close the calculator by clicking the X in the upper right of the popup screen. The survey will continue where you left off.



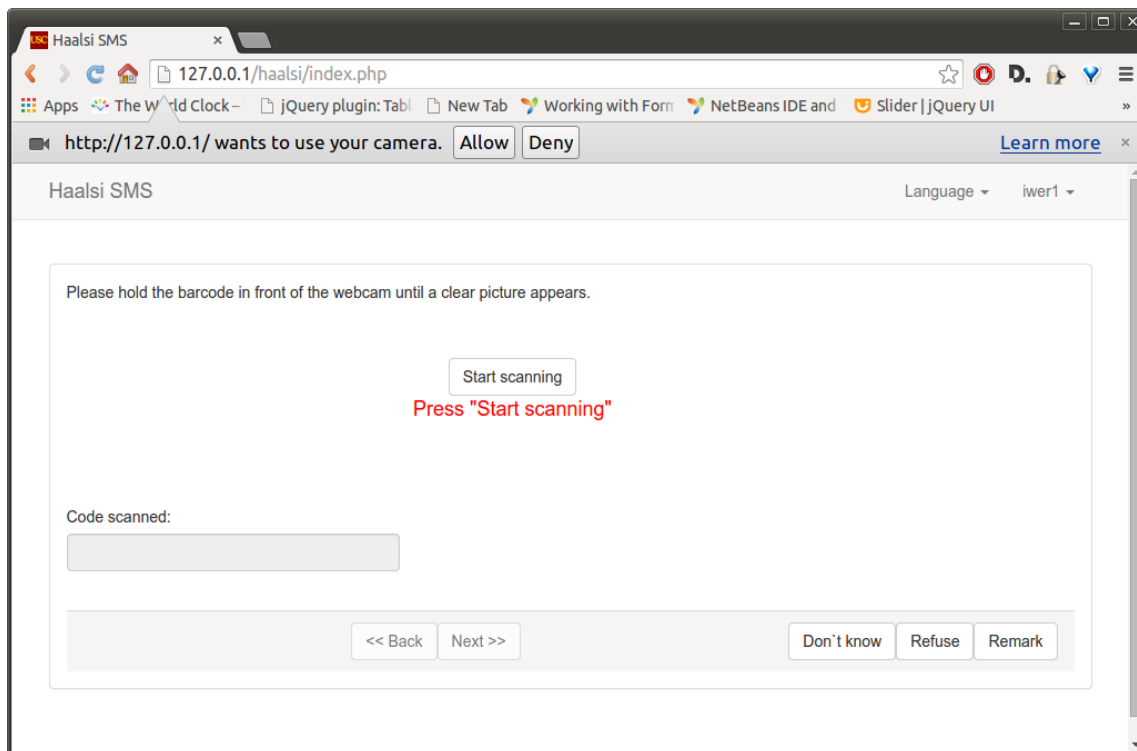
On some screens, you will need to enable the camera for your device. When the survey system asks for it, you can do so by clicking **Allow** on the top bar.



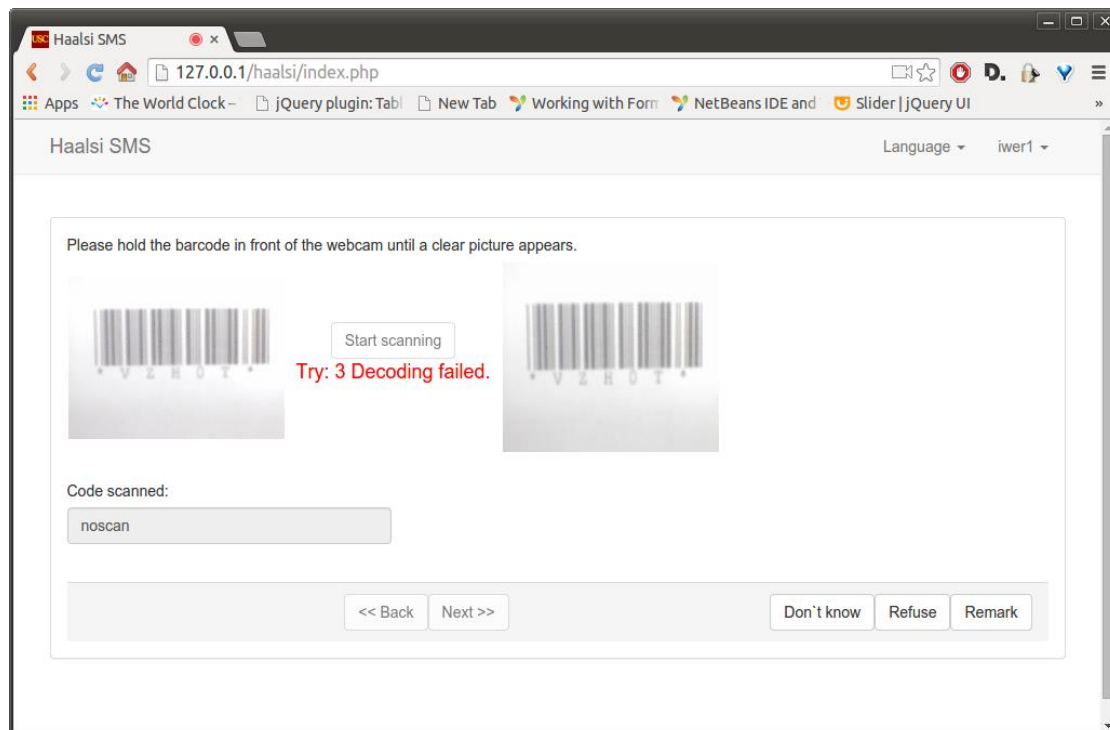
After allowing the system access, you will see the window on the left recording a video. Press **Take photo** when the respondent is happy about the way he or she looks. You can take multiple pictures before pressing **Next >>**, but only the last picture is stored in the system.



During the interview, the system may ask you to photograph a barcode. The procedure here is the same as when taking a picture. After pressing *Allow*, the system will start recording on the left screen.

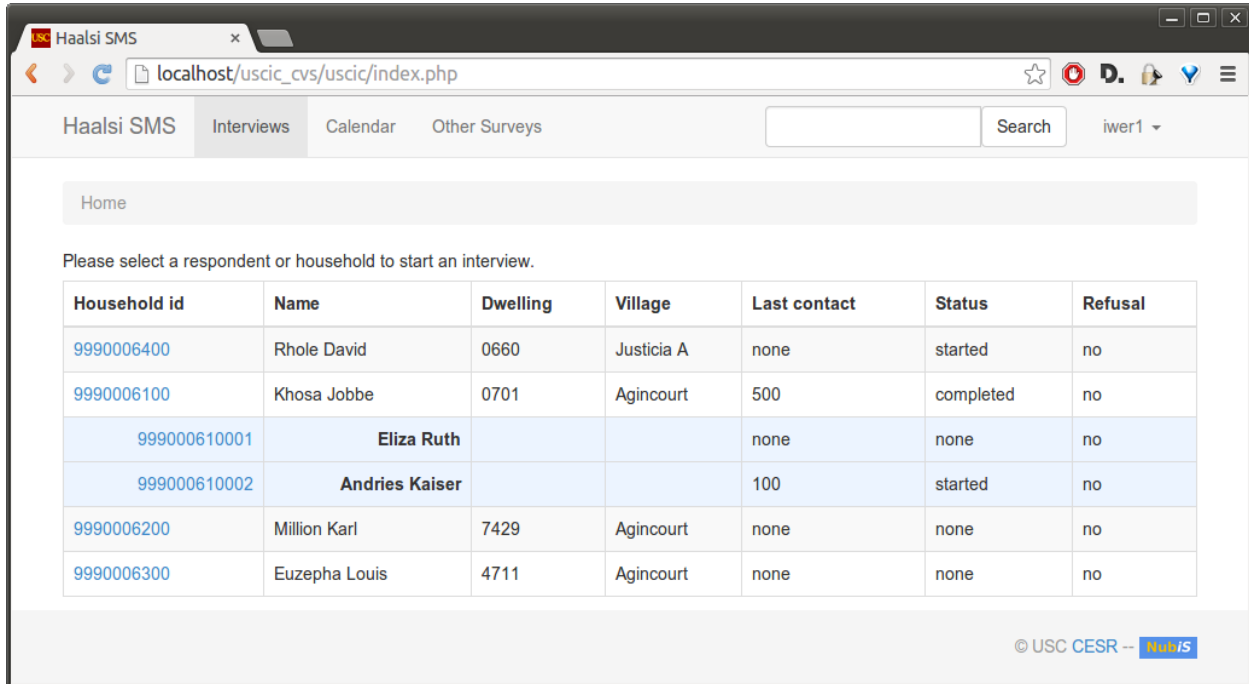


After allowing the system access to the camera, hold the barcode steady and close to the device. Press **Start scanning** and the right-hand window will show a snapshot of the barcode every 3 seconds.



The system should automatically recognize the barcode. If the barcode doesn't scan immediately, just keep it up in front of the camera and hold it still. The picture on the right side should be clear and in focus.

At the end of the survey, you will be routed back to the SMS automatically and the interview will show up as **completed**. After completion, you cannot go back into the survey. After finishing a household-level survey, new lines will be added for each respondent who needs to be interviewed.



The screenshot shows a web browser window with the URL `localhost/uscic_cvs/uscic/index.php`. The page title is "Haalsi SMS". The navigation bar includes "Haalsi SMS", "Interviews" (selected), "Calendar", and "Other Surveys". There is a search bar and a dropdown menu labeled "iwer1". Below the navigation bar, there is a "Home" button. The main content area displays a message: "Please select a respondent or household to start an interview." followed by a table of respondents.

Household id	Name	Dwelling	Village	Last contact	Status	Refusal
9990006400	Rhole David	0660	Justicia A	none	started	no
9990006100	Khosa Jobbe	0701	Agincourt	500	completed	no
999000610001	Eliza Ruth			none	none	no
999000610002	Andries Kaiser			100	started	no
9990006200	Million Karl	7429	Agincourt	none	none	no
9990006300	Euzepha Louis	4711	Agincourt	none	none	no

At the bottom right of the page, there is a footer: "© USC CESR -- [NubIS](#)".

On the task bar on the SMS screen, if you click *iwer1*, there are more options. One allows you to change your preferences:

Haalsi SMS | Interviews | Calendar | Other Surveys

Search | iwer1

Home

Please select a respondent or household to start an interview.

Household id	Name	Dwelling	Village	Last contact	Status	Refusal
9990006400	Rhole David	0660	Justicia A	none	started	no
9990006100	Khosa Jobbe	0701	Agincourt	500	completed	no
999000610001	Eliza Ruth			none	none	no
999000610002	Andries Kaiser			100	started	no
9990006200	Million Karl	7429	Agincourt	none	none	no
9990006300	Euzepha Louis	4711	Agincourt	none	none	no

© USC CESR -- [Haalsi/S](#)

Here, you can set filters and the region in which you are currently interviewing. Choosing these filters will reduce, on the main screen, the number of households available to interview.

Haalsi SMS | Interviews | Calendar | Other Surveys

Search | iwer1

Preferences

Filters

Households/Respondents:

Region:

Settings

Survey: [reset test cases](#)

Communication:

Also on the **Preferences** screen, you can switch between **Normal mode** and **Test mode**. Test mode allows you to play with the instrument, with four test households available, before conducting real interviews. If you have used all four households, click **reset test cases** to get four fresh test households.

On the info screen, you can start an interview and add a contact. Use this if you contacted the household or respondent, and set an appointment to do the actual interview.

The screenshot shows the 'Info' screen for Household 9990006100. The browser address bar shows 'localhost/uscic_cvs/uscic/index.php'. The navigation bar includes 'Haalsi SMS', 'Interviews', 'Calendar', and 'Other Surveys'. The breadcrumb trail is 'Home / Household / Info'. The main content area displays household details: Name: Khosa Jobbe, Dwelling: 0701, Village: Agincourt, Status: none, and # of contacts: 0. Below this, there are fields for Telephone, PSU, and GPS. A blue box titled 'HH members' lists 'Eliza Ruth (M) 77 Financial R' and 'Andries Kaiser (M) 69 Family R'. On the right, a sidebar for Household 9990006100 contains links for 'info', 'Contacts', 'History', 'Remarks', and 'Edit'. At the bottom, there are two buttons: 'Add Contact' and 'Start Interview'. The footer shows '© USC CESR' and a 'haalsi' logo.

After clicking the **Add contact** button, the following screen will appear:

The screenshot shows the 'Add contact' screen for Household 9990006100. The browser address bar shows 'localhost/uscic_cvs/uscic/index.php'. The navigation bar is the same as the previous screen. The breadcrumb trail is 'Home / Household / Add contact'. The form contains fields for 'Date/Time' (set to 08/12/2014 10:05 am), 'Outcome' (a dropdown menu with 'Please select'), 'Remark' (a text area), and 'Appointment' (a date/time picker). Below the form is an 'Add Contact' button. A yellow message box at the bottom states 'Please select an outcome of this contact.' The right sidebar for Household 9990006100 is identical to the previous screen, with links for 'info', 'Contacts', 'History', 'Remarks', and 'Edit'.

Choose any of the contact outcomes and add an appointment date and time when necessary.

Please select
101: Contact no resistance
102: Resistance
103: Unable to contact
104: Unable to locate
105: Unable to participate
106: All deceased
107: Language barriers

The appointments will show up on the **Calendar** tab. You can access the calendar by clicking on the tab on the top of the screen.

Haalsi SMS

Interviews

Calendar

Other Surveys

<< Prev

Today

Next >>

Year

Month

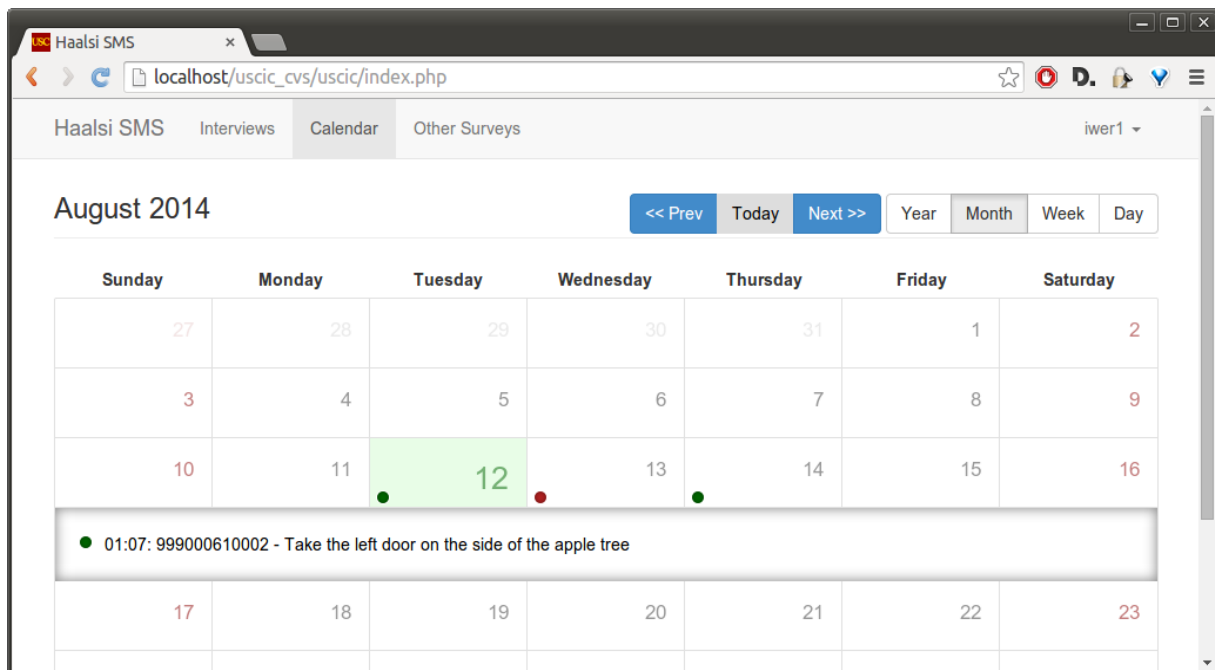
Week

Day

August 2014

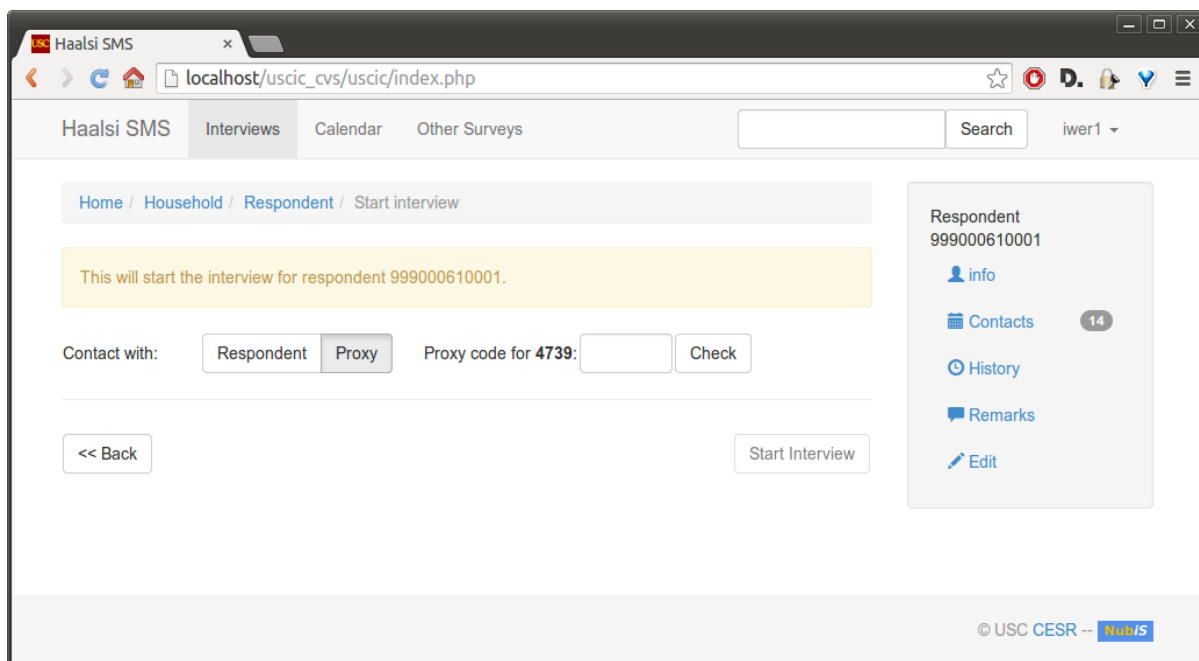
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

The current day is highlighted and appointments show up as dots on the calendar. Click on a dot to see more information, link directly to the household or respondent, add another contact or start an interview.



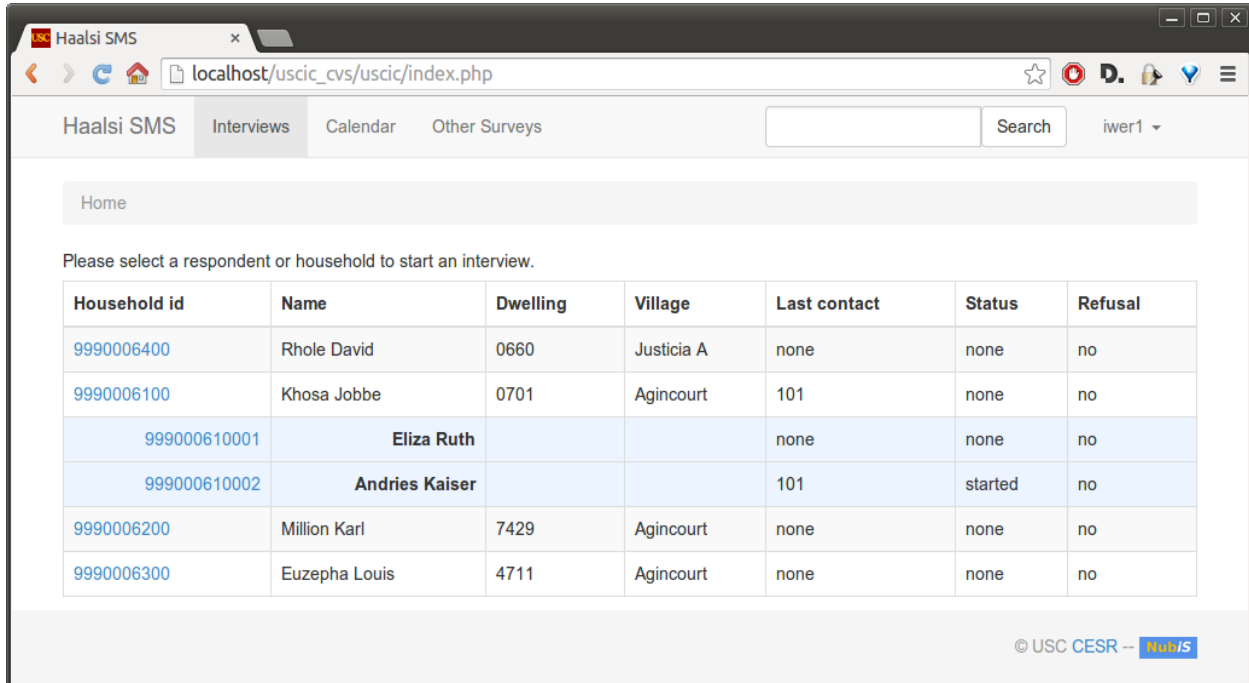
You can look at appointments in your calendar by day, week, month and year.

When starting an individual survey in proxy mode, you are asked to provide a proxy code. Call your supervisor and give the code appearing on your screen (in this example, 4739). The supervisor will give you another four-digit code that you can enter to start the survey in proxy mode.



After completing an interview, you can shut down the device by pressing the power button once. A message will appear with a number of options. Choose the **Shut Down** option at the right side of the message box. You can also shut down the device by holding down the power button for more than five seconds.[Office1]

If you don't use the computer for a while when it is on, the system will ask you to provide a password when you get back. The password that unlocks the device in this case is *iwert*.



The screenshot shows a web browser window with the address bar displaying `localhost/uscic_cvs/uscic/index.php`. The page title is "Haalsi SMS". The navigation bar includes "Interviews", "Calendar", and "Other Surveys". A search bar and a user dropdown menu showing "iwer1" are also present. The main content area has a "Home" link and a prompt: "Please select a respondent or household to start an interview." Below this is a table with the following data:

Household id	Name	Dwelling	Village	Last contact	Status	Refusal
9990006400	Rhole David	0660	Justicia A	none	none	no
9990006100	Khosa Jobbe	0701	Agincourt	101	none	no
999000610001	Eliza Ruth			none	none	no
999000610002	Andries Kaiser			101	started	no
9990006200	Million Karl	7429	Agincourt	none	none	no
9990006300	Euzepha Louis	4711	Agincourt	none	none	no

At the bottom right, there is a footer: "© USC CESR -- [Nubis](#)".

If at any time you are stuck in the system, click in the menu bar in the top left containing the system name (here 'Haalsi SMS'). It will take you back to the systems main page.