CAPI App User Guide

Forsta Plus v2022

This is revision 1 of the Forsta Plus v2022 CAPI App Administrator Guide published in January 2022. The information herein describes Forsta Plus CAPI App and its features as of Build nr. 2022.1.187. New features may have been introduced into the product after this build; go to www.forsta.com or check “News” on the Customer Extranet for the latest updates.

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What's New in this Revision?

Note: Only the latest changes to this documentation are listed here. Changes made to earlier revisions are listed in the "Changes to the User Documentation" document which can be downloaded from the company Extranet at https://extranet.confirmit.com. Note that you will need to log in to the extranet to download this document.

The following changes have been made in revision 1 of the Forsta Plus v2022 CAPI App Administrator Guide:

- The manual is updated with new logo, company and product names. Note that images will be updated at a later date, and URLs, folder names etc. will be corrected as the changes become applicable.
- The text in the Interview and Respondent Life Cycle topic is edited; a bullet point is removed as it is no longer valid (see Interview and Respondent Life Cycle on page 41 for more information).

Note: The general layout and language in this document is continually being corrected, adjusted and improved to ensure the user has the best possible source of information. Only NEW information and details of functionality that has changed since the previous revision are listed here - minor corrections to the text and document layout are not listed.

Important
We need your feedback so we can improve this document and provide you with the information you require. If you have any comments or constructive criticism concerning the content or layout of this documentation, please send an email to documentation@forsta.com. Please include in your email the section number and/or heading text of the section to which your comment applies.

1. Introduction

Note: Forsta Plus CAPI is a chargeable add-on. If your company has not licensed the CAPI add-on then the CAPI menus and associated options will not be available or visible in your Forsta Plus system.

Forsta CAPI (Computer Assisted Personal Interviewing) is built on the Forsta web-based platform. This enables the same advanced and sophisticated capabilities typical to online surveys to be used for offline face-to-face field work or for self-completion of the surveys. Multimedia elements such as advertising commercials, complex survey logic, advanced quota control and multilingual interviewing can be included in the surveys.

The platform is a 100% integrated application. CAPI users benefit from one common authoring environment that allows them to design surveys and manage projects and interview quotas, regardless of the data collection mode employed. Both CAPI and CAWI take advantage of Forsta Reportal.

As either an On-Demand hosted solution or a server installation, the platform provides centralized control of face-to-face field work. It allows the centralized distribution via the Internet of new and updated surveys to the CAPI enabled devices, and centralized sample management and communication with the interviewer workforce.

Interviewers connect to the Internet before commencing their field work, to synchronize new or updated surveys. They can reconnect during the field work or on completion to synchronize the response data with the central platform.

Forsta Plus enables businesses to conduct projects on both CAWI and CAPI using different samples running in parallel and thus increase their audience. Forsta Plus surveys and reports are designed and managed on the same integrated platform, enabling organizations to choose the preferred method of mixed mode data collection that best supports their particular business and/or methodology objectives.

1.1. Features

CAPI provides the following CAPI/Kiosk-specific components in addition to the Forsta Plus platform for survey design, survey translation, online data collection, and report creation and distribution. For more information, refer to the Forsta Professional Authoring and Reportal User Guides.

- **Administrator Module** - this is fully integrated with Forsta Plus and provides interviewer management, sample management, and synchronization status reports on the project progress.
- **Interviewer App** - this is usually installed on Android and/or iOS phones and tablets as well as on Windows-based devices. It provides access to Forsta Plus surveys that are deployed by a CAPI administrator and assigned to an interviewer. It allows control of these surveys (start, stop, cancel, postpone and restart interviews).
- **Synchronization** - can only be performed when the Interviewer Device is connected to the Internet. During the synchronization process, new or updated surveys, personal quotas and samples are downloaded to the interviewer device, response data is uploaded to the central server, and new Interviewer app updates are automatically downloaded and installed on the interviewer’s device. In addition, the interviewer is checked to establish whether he/she is in the same company as the survey, and if not, the capicommon and pxxx folders (if any) in the company file library are downloaded to the device.

The following chapters explain the features in greater detail, and describe how to install and set up CAPI App ready to conduct surveys.

1.2. Platform and OS Requirements

Refer to the Forsta System Requirements document which is published on the Forsta extranet.

1.3. Password Policy

As part of the continuous effort to ensure that Forsta Plus complies with the highest standards of security, the following password policy applies for end users (CAPI interviewers, report viewers, Analysts and Designers) and Professional Authoring or Survey Designer users (Professional/Translator).

General:

System messages are provided (with translations to commonly used languages) for these settings. The appropriate error messages will be displayed when users choose passwords that do not comply with the site settings.

The Authoring, Reportal and Community Portal modules all have ‘Forgotten Password’ functionality. This allows end users to trigger an email so they receive an activation link that opens a page where they can reset their password.

All passwords are hashed and not transmitted in plain text. Consequently, passwords will not be available in plain text for any system users. Instead, users will be sent an activation link to open a page where they can choose their own password.

On-Demand users:

The passwords for all areas of Forsta Plus must satisfy the same minimum requirements for complexity. Wherever passwords can be changed or set within the application, they will be validated against these rules before the change is accepted.

- **Password history** - the new password must be different from the last 12 passwords.
- **Minimum age** - the user will have to wait 24 hours after changing the password before being allowed to change it again.
- **Maximum number of login attempts** - after 5 invalid login attempts the account will be locked. The user will not be allowed to login again until the account is reactivated by the system administrator.
- **Uppercase characters** - the password must contain at least 1 uppercase letter.
- **Non-alpha characters** - the password must contain at least 1 character that is not a letter (a..z, A..Z).
- **Password length** - the password must contain at least 8 characters.
- **Password expiry days** - the password will expire after 60 days. (This will not apply for login to the CAPI app.)

It is possible to enforce even stricter requirements through certain company settings. Contact Forsta support if you wish to implement a stricter policy.

On-Premise users:

The following configurable settings are enforced for all On-Premise users. If the Company Administrator selects to use the settings, users will have to comply with these settings when changing their password:

- **Password history -** the new password must be different from the last X passwords.
- **Minimum age -** the user will have to wait X hours after changing the password before being allowed to change it again.
- **Maximum number of login attempts -** after X invalid login attempts the account will be locked. The user will not be allowed to login again until the account is reactivated by the system administrator.
- **Non-alpha-numeric characters -** a required minimum number of characters that are not numbers (0..9) or letters (a..z, A..Z).
    - **Uppercase characters -** a required minimum number of uppercase letters.
    - **Non-alpha characters -** a required minimum number of characters that are not letters (a..z, A..Z).
    - **Password length -** a required minimum number of characters in the password.
    - **Password expiry days -** the password will expire after a number of days. Note that this will not apply for login to the CAPI app.
    - **Password strength -** in addition to a combination of the above settings, a regular expression may be used to enforce an even stricter policy.

For Professional Authoring users, stricter requirements can be enforced through specific company settings. Refer to the server documentation provided with the release for details.

1.4. CAPI App Languages

The CAPI App menu system, buttons and system messages can be presented in a number of languages. These now include Arabic, Chinese (Mandarin), German, Indonesian, Japanese, Korean, Russian, Thai, Turkish, and Vietnamese.

Change the app language as follows:

1. Once logged into the app, tap on the **Menu** button and choose **Settings**.
2. In the Settings page, tap on the **Flag** icon to bring up the list of supported languages.
3. Choose the language you want to switch to.

2. Installing and Activating CAPI App on Interviewer Devices

You can install the CAPI App onto as many devices as you wish. However the number of CAPI devices that can be active at one time is restricted to the number of installations licensed. For example, if your company has licensed 10 CAPI installations, and installs the CAPI App onto 12 devices, all 12 devices can be used, but only 10 devices can be activated by the interviewers at one time. When the 11th interviewer attempts to activate his/her device, the interviewer will receive an error message stating that the allowed number of licensed CAPI installations has been exceeded.

Important
If a device is activated and a user is logged in, and an administrator then deactivates the device (via Console Management; (see How to Deactivate a Console on page 35 for more information)), the logged-in user can still collect data. However as soon as the user initiates a sync, the user will be logged out and an error message is displayed stating that the device is deactivated. Note that data will not be lost - collected data can be synced once the administrator re-activates the device.

Note: If more than one interviewer needs to login to a device, then the interviewers should ensure they synchronize the app before they log off after use to ensure any data they have collected is transferred to the server.

Companies with CAPI access are allocated one additional user with the role **CAPI Activation User**. This user has **system_company_administrate permission**, which gives access to all projects that are set up within the company. The **CAPI Activation User** must have the administrator access so that the generated activation codes could allow synchronization for all projects.

Note: The user who performs the installation and activation must have Administrator rights on the interviewer device.

A list of the end users (the interviewers who will be using the CAPI devices) must be registered in Forsta Plus before the activation codes can be sent so that multiple users can conduct surveys using the devices. This list can comprise User IDs and need not be “actual” personal names. Contact Forsta Plus Support for further details.

2.1. Requirements Prior to Commencing Installation and Setup

Before your company’s CAPI Activation User can start installing and setting up the CAPI devices, your company must complete the following:

- A CAPI End User list must be created using the End User Administration interface (see Interviewer Lists on page 5 for more information). Each End User list is assigned a unique List ID number, and the list ID number for your company’s list must be sent to Forsta’s License Administrator so it can be registered to your company.
- The details of the CAPI Interviewers – the people who will be conducting the offline interviews – must be set up in the CAPI End User list using the End User Administration interface. These details can be added to the list or edited at any time; the list can be changed after it is registered. Refer to the Professional Authoring User Guide for further details.
- Your company must register a specified number of CAPI Device licenses.

Forsta's License Administrator must then complete the following:

- The CAPI End User list ID that your company has provided to Forsta must be registered to your company.
- The number of CAPI devices that your company has licensed must be registered in Forsta Plus.
- In most cases a "CAPI Activation User" is designated for your company. This user is able to create the CAPI Activation Codes that are required to activate each CAPI device.

Once these tasks have been performed you will receive notification from Forsta's license Administrator. You may then commence installation.

On-Demand only: Contact Forsta Professional Services at support@confirmit.com when you need the End User List information to be added to your company settings.

On-Premise: contact your Forsta Plus Software Administrator for assistance.

2.2. Interviewer Lists

A CAPI End User list must be created using the Forsta Plus End User Administration interface.

To view any existing interviewer lists:

1. Go to the **End Users > Lists** menu command.

   The End User Lists page opens. This page contains all the End User lists currently available to you (if any).

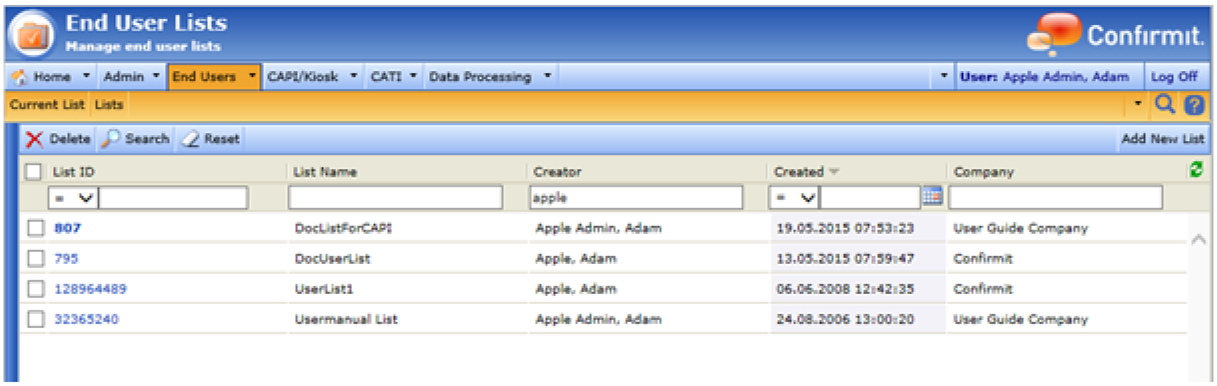

Figure 1 Example of an End User List for CAPI

2. Click on a blue List ID link to open the list.

   In the list's Users tab, all the registered interviewers are specified with UserID and email address.

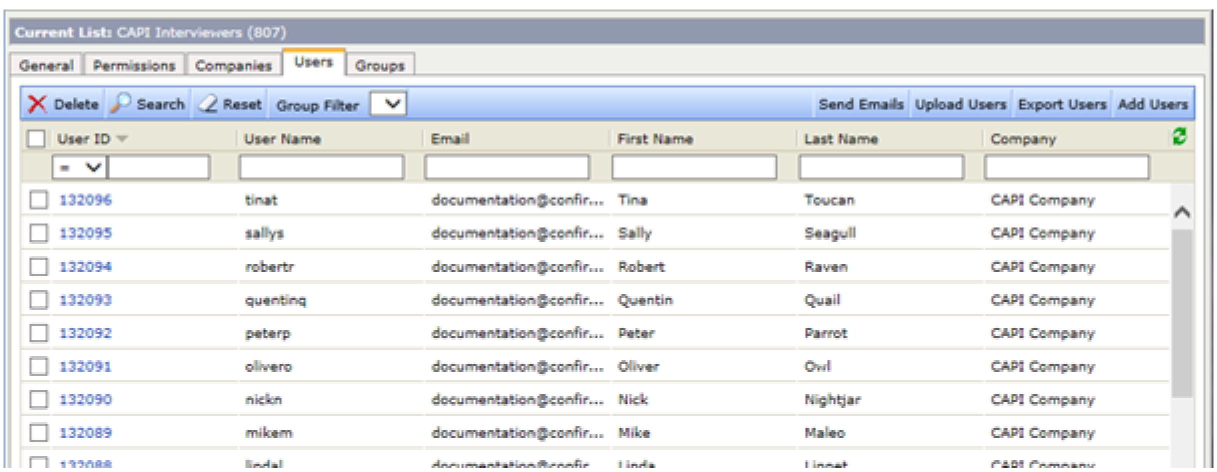

Figure 2 Example of users in an End User list

Note: You can create "non-personal" users in the user list, for example Interviewer_1, Interviewer_2 etc. so that any interviewer can log in as long as they use the correct password.

To create a new list:

1. From the End User Lists page click **Add New List**.

   The New End User List dialog opens.

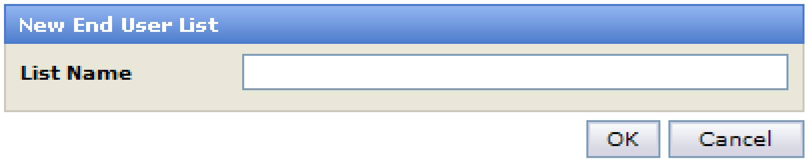

Figure 3 The New End User List dialog

2. Give the new list a logical name and click **OK**.

   The list is created, and opens on your display ready for you to add end users. The list will be included in the End User List page, and can be opened later for editing from there.

For more information about End User Administration, refer to the separate authoring user guide.

2.3. Generating the Activation Codes

Note: You (as the CAPI Activation User) must create the End User list and register the list ID with Forsta before you can create the activation codes. The list can be edited after registration (see (see Requirements Prior to Commencing Installation and Setup on page 4 for more information) for more information).

Important
The professional user account used to generate the CAPI activation codes is automatically allocated company admin rights, and that account is then permanently linked to the activated devices. The Admin role cannot be revoked, nor can the account be deleted, otherwise the CAPI devices will not be able to sync. If the server-side account is deleted for any reason, new activation codes will have to be issued.

2.3.1. The App Activation Code

Your interviewers will need to download and install the CAPI app to their device (see Installing, Upgrading, and Uninstalling CAPI App on page 7 for more information) and activate it using a code generated here.

To create the code:

1. On your PC, log on to Forsta Plus as the CAPI Activation User using the user ID and password sent by Forsta.
2. Go to the **CAPI/Kiosk > Admin > Console Activation** menu command.

   The CAPI/Kiosk Activation overlay opens.

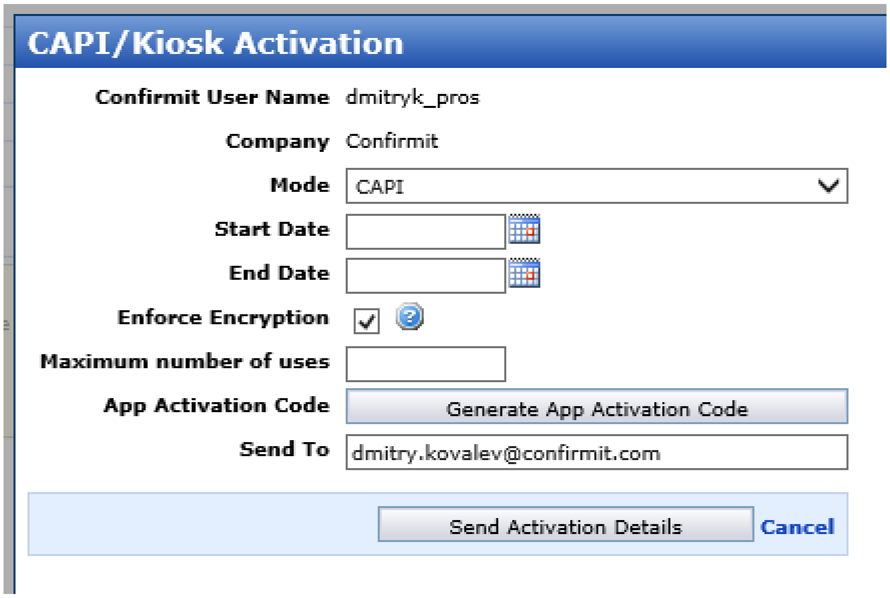

Figure 4 The CAPI App Activation overlay

3. Define the duration of the App activation code (the time frame during which the devices must be activated).

Note: The Start and End dates only control the validity of the code; after a device has been activated it will not expire. After the specified End Date it will not be possible to activate a device using the code. A new code must then be generated by the CAPI Activation User.

4. Decide whether you wish to enforce encryption, and check/uncheck the box as required.

   When Enforce Encryption is selected, the CAPI app can only be installed on devices that have device encryption enabled. If encryption is not enabled it will not allow the app to be installed. The app will not encrypt the device automatically. This option does not apply to CAPI on Windows.

5. Maximum number of uses - Applies to CAPI Apps only. Specify how many times can this code be used for activating CAPI Apps. This is an optional setting. This number does not get decremented when an installed CAPI app is deactivated. When the app has been installed the specified number of times, this code cannot be used any more

6. Click the **Generate...** button to create the code; the code is then presented in place of the button.

   One valid activation code can be used to activate a number of devices (not exceeding the number entered into the "Maximum Number of Uses" field) – you do not need to generate separate activation codes for each device. Remember that this code expires as soon as the specified number of installations is reached. Deactivating a device does not decrement the counter, so the number of available installations equals the number entered into the "Maximum number..." field. Generate the code once and distribute it to all the administrators who will be performing the installations. Note that you can only send the code by email to one address at a time from Forsta Plus. However, the code can be copied into emails produced by other applications (such as Outlook) and distributed en-mass as required.

2.4. Installing, Upgrading, and Uninstalling CAPI App

The procedure for installing, upgrading, and uninstalling CAPI App is different for Android and iOS devices and Windows.

2.4.1. Downloading and Installing CAPI App

For Android or iOS devices, download and install the CAPI App using the appropriate store application (Play Store for Android, App Store for Apple devices).

Alternatively, for Android devices that are restricted from downloading using the Play Store app, you can download the application directly from www.confirmitapp.com via your browser.

For Windows devices, download and install the CAPI App from www.confirmitapp.com via your browser.

2.4.2. Enterprise and Silent Installation for Windows

Windows provides support for unattended installation where enterprise deployment is required. The following parameters can be added after the setup exe:

/VERYSILENT	Display no visual setup. Used for enterprise deployments
/CURRENTUSER	Install in non-administrator mode
/ALLUSERS	Install in administrator mode
/DIR="<path>"	Override the default application folder (C:\Users\<USERNAME>\AppData\Local\Confirmit), typically used in conjunction with /ALLUSERS

For example:

```
C:\ConfirmitCapiAppSetup_2020.0.23.exe /VERYSILENT /CURRENTUSER
/DIR=”C:\Program Files (x86)\Confirmit\CAPI”
```

App Config (Windows)

To customize default app behavior, a config file is available:

```
C:\ProgramData\ConfirmitCAPI\app_config.json
```

This provides the following configurable properties:

```
"AppConfiguration": {
"LoginOnRestart": false,
"StartFullScreen": false
}
```

Where:

- LoginOnRestart – setting true will require the interviewer to login when the application is started.
- StartFullScreen – automatically starts the application in full screen mode (e.g. F11)

2.4.3. Upgrading CAPI App

To upgrade CAPI App on your Android or iOS devices, download and install the latest CAPI App version using the appropriate store application (Play Store for Android, App Store for Apple devices). Typically, apps will default to automatically update when a new version is available.

To upgrade CAPI App on Windows, download the latest version available from www.confirmitapp.com.

2.4.4. Uninstalling CAPI App

The uninstall procedure for CAPI App on your Android or iOS device is similar to any other app. On Android devices you can uninstall CAPI App via **Settings**, on iOS devices you can uninstall CAPI App by a long-press on the app icon and selecting **Delete App**.

Warning:
Uninstalling the app on Android and iOS devices is the same as deleting; all stored data is permanently removed and can not be recovered.

To uninstall CAPI App on Windows go to **Settings > Add or Remove Programs**. This action only removes the application files. To remove stored data, remove the following folders manually:

- C:\Users\<USERNAME>\AppData\Local\ConfirmitCAPI
- C:\ProgramData\ConfirmitCAPI

3. Setting Up

The following topics describe how to set up your system.

3.1. How to Set Up a Survey for CAPI/Kiosk

When you have created and programmed your survey in Professional Authoring or Survey Designer (refer to the appropriate user guide for more information), and you want the survey to be either only a CAPI survey or both a CAPI and a CAWI survey, proceed as follows:

1. Before you launch the survey, go to the **Designer > Survey Settings** menu command, **Survey Channels** tab, and select the CAPI/Kiosk survey checkbox (ringed below).

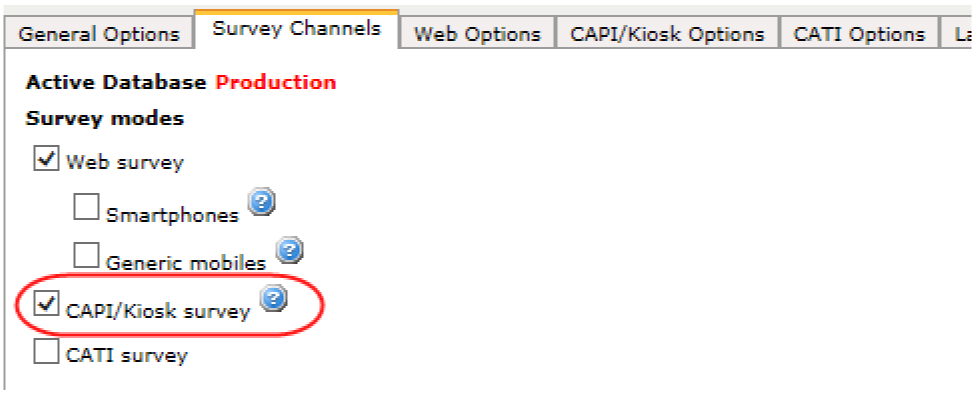

Figure 5 Selecting the CAPI/Kiosk Survey setting in the Survey Channels page

2. Go to the CAPI/Kiosk Options tab .

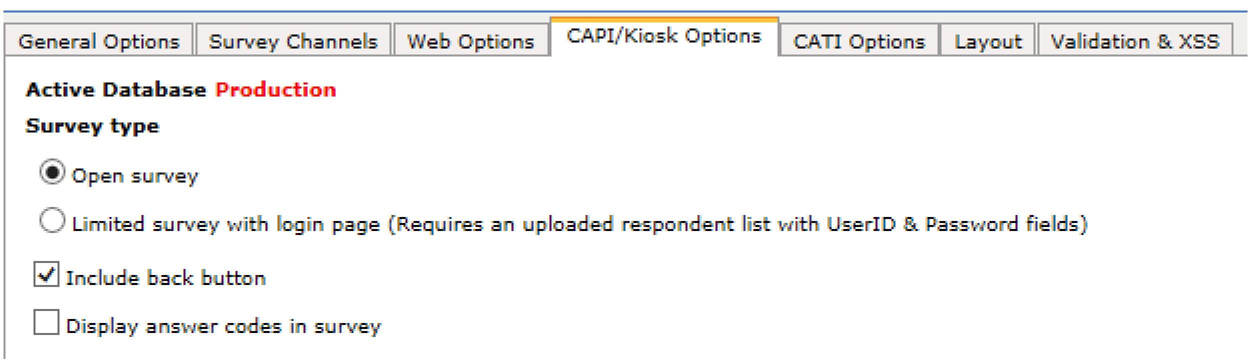

Figure 6 Setting the CAPI/Kiosk Options

This tab contains a number of options. As with web surveys, you can define a CAPI survey to be either Open or Limited.

- When a CAPI survey is defined as Open, the interviewers generate the interviews/responses themselves on the console. If the console is set up as a Kiosk, anyone who wishes to respond to a survey can do so.
- When a CAPI survey is defined as limited, the interviewers will either have specific respondents assigned to them or, if the console is set up as a Kiosk, respondents must log in to the survey using the userids/passwords that have been uploaded into the survey.

Also, you can specify that the answer codes are displayed beside the category text for single and multi questions. For example, a Gender question with the answers Male (code 1), Female (code 2) and Refused (code Ref), would be presented as:

1: Male
2: Female
Ref: Refused

The layout will always take the format **code label: category text**.

For information on other Survey Settings (Web options, Layout, Validation), refer to the Professional Authoring or Survey Designer User Guide as appropriate.

Note: Forsta Plus users who are to be CAPI administrators for a project must be given "Supervise CAPI Project" permission for the specific project in the Survey Management > Permissions page.

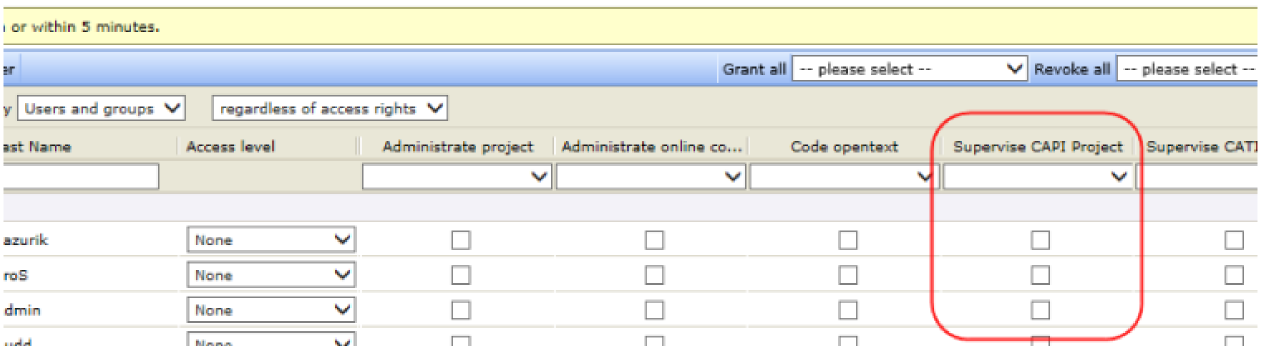

Figure 7 Setting the Supervise CAPI Project permissions

3.2. The Survey Channel Function

When a survey is to be conducted as both CAWI and CAPI, you may wish to display specific questions in one mode that are not required in the other. To achieve this, use the GetSurveyChannel() function.

If for example a survey has one group of questions that are to be shown only in the CAPI survey and another group of questions that are to be shown only in the CAWI survey, include two Conditional expressions in the survey to define this logic, as shown below.

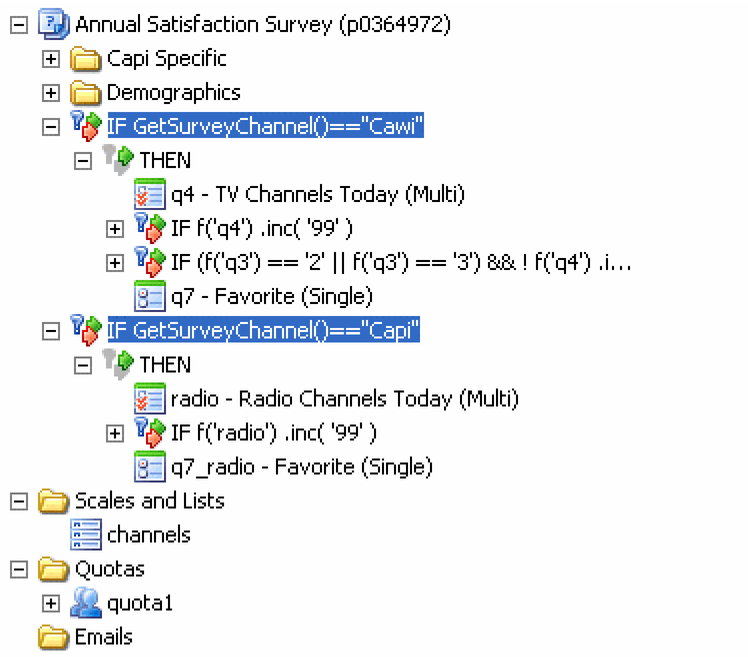

Figure 8 Using the GetSurveyChannel Function

In the example above, respondents answering the web survey will only see the questions concerning TV Channels, while the CAPI Interviewer will only be able to see and ask the questions concerning radio.

You can also set the channel mode into a hidden question using a script if for example you want to report on the channel mode.

Insert a script node into the survey and write the following script:

```
f("mode").set(GetSurveyChannel())
```

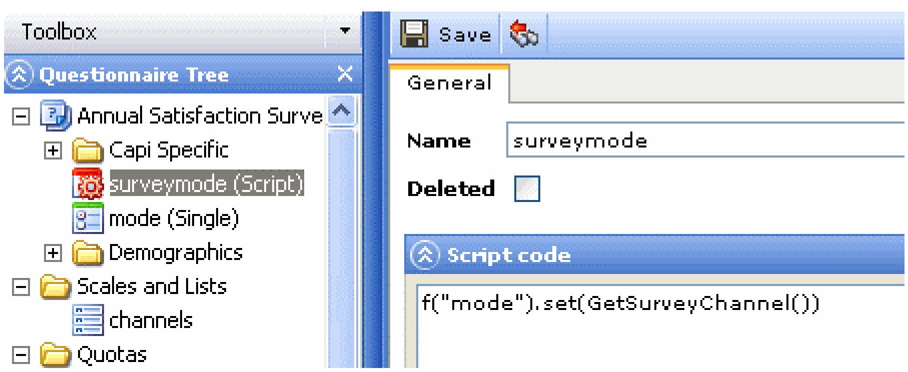

Figure 9 Adding GetSurveyChannel in script

The script must refer to the question where the survey mode is to be set. The question must be a Single question (here with ID "mode") with two Answers. Make the codes for these answers **Capi** and **Cawi**.

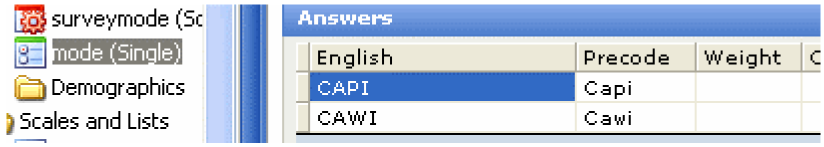

Figure 10 The Single question survey channel

3.3. Files in CAPI Surveys

Note: Refer to the authoring application's user guide for more information about the File Library functionality in Forsta Plus.

If you must refer to images or other files in a CAPI survey, then to ensure that the files are included in the survey during the synchronization process they must be stored in specifically named folders in the File Library. The folder name must be either the project number if they are used only in this project, or “CAPICommon” if they are shared across several CAPI surveys.

Note: The following characters are not allowed and must not be used in folder names in the File Library: + % / \ ? # $ & * | : " < >.

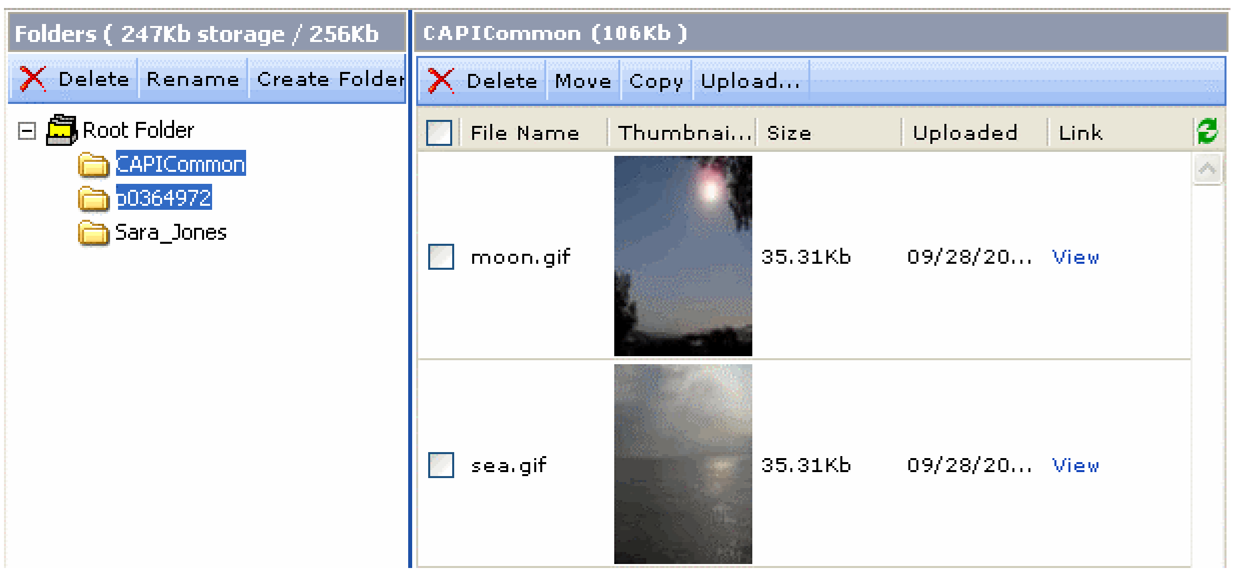

Figure 11 Files used in a CAPI survey

4. The CAPI/Kiosk Menu

The CAPI Administrator Module is fully integrated with Forsta Plus and includes the following functionality:

- **Interviewer Management** – enabling complete control of the interviewer workforce (see Interviewer Management on page 15 for more information).
- **Sample Management** – enabling proper sampling on “offline” populations (see Sample Management on page 18 for more information).
- **Synchronization Status** – ensuring the administrator is informed of project progress (see Synchronization Status on page 27 for more information).
- **Messaging system** – This module does not apply to the CAPI App.
- **Productivity Stats** – you can create reports of the interviewer productivity statistics (see Productivity Statistics on page 30 for more information).
- **Upload Interviewer Assignments** – in the event you have a large field force, where a large number of assignments need to be made on a regular basis, this function enables you to upload the assignments from a tab-delimited text file (see Uploading Interviewer Assignments on page 32 for more information).
- **Download CAPI Console** - This module does not apply to the CAPI App.
- **Admin** – provides access to the Administrator functions.

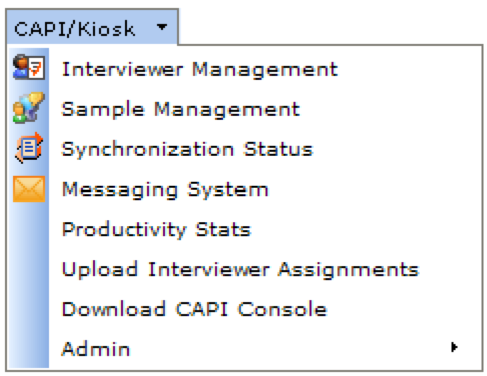

Figure 12 The CAPI/Kiosk menu

The Admin sub-menu is available only for CAPI administrators and has the following functions:

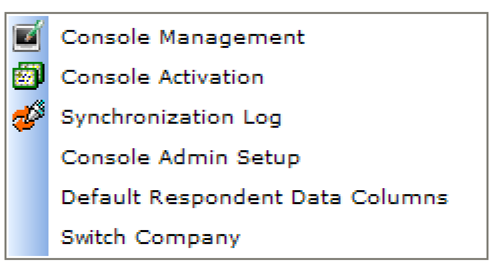

Figure 13 The Admin sub-menu

- **Console Management** – to set up and manage the console (see Console Management on page 33 for more information).
- **Console Activation** – to activate the console (see Console Activation on page 35 for more information).

- **Synchronization Log** – a list of console synchronization operations (see Synchronization Log on page 35 for more information).
- **Console Admin Setup** – This module does not apply to CAPI App.
- **Default Respondent Data Columns** - allows administrators to specify the default columns of respondent information that are to be displayed in the CAPI console (see Default Respondent Data Columns on page 37 for more information).

Note: Re-synchronization of productivity data, which was previously possible through this sub-menu, is now achieved via the Professional Authoring Admin menu. Refer to the Administrator manual for further details.

These functions are explained in the following topics.

4.1. Interviewer Management

When your survey has been launched as a CAPI survey (see How to Set Up a Survey for CAPI/Kiosk on page 10 for more information) and the interviewers are set up in a list in End Users, the CAPI administrator can start to administer the survey and interviewers.

This section is for the CAPI administrator.

4.1.1. How to Add or Remove Surveys for Interviewers

Note: You must have CAPI Project Supervisor permission for the survey before you can add and remove interviewers (see How to Set Up a Survey for CAPI/Kiosk on page 10 for more information).

To add/remove a survey for interviewers

1. Go to the **CAPI/Kiosk > Interviewer Management** menu command.

   The page shown below opens.

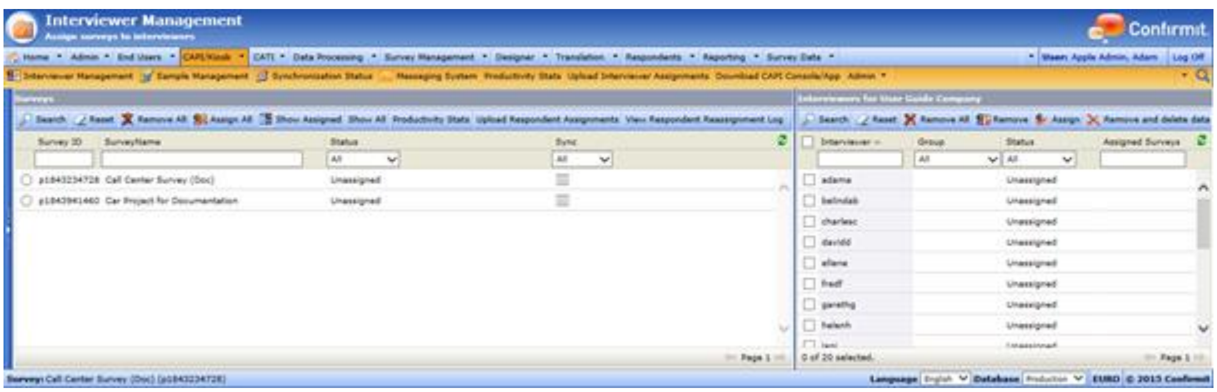

Figure 14 Example of the Interviewer Management screen

   The page shows two lists. The Surveys list on the left displays all the surveys that have been launched as CAPI surveys and to which the current administrator has access. The Interviewers list on the right displays all the interviewers who have been set up in the End User List to which a reference is made at the company level in the Forsta Plus User Administration interface.

2. To assign interviewers to a project or remove them from it, select the project and the interviewers, click the appropriate button in the toolbar above the interviewers list, then confirm the action.

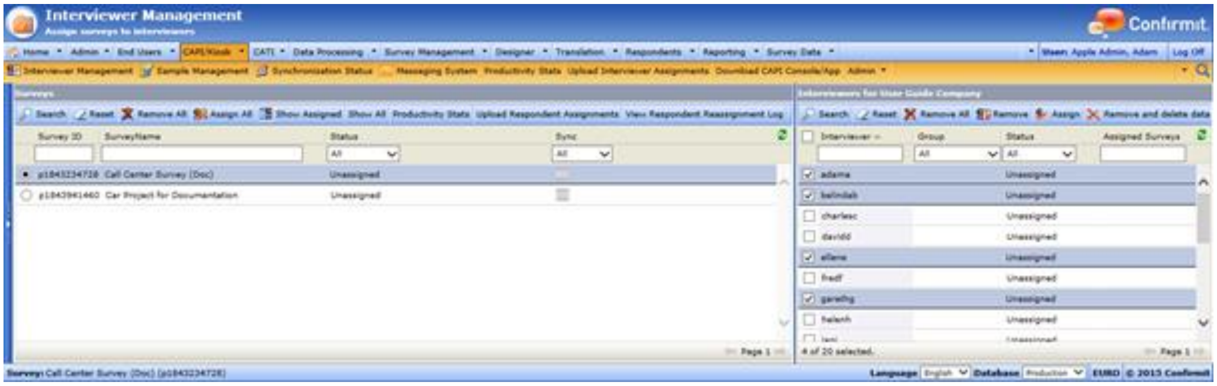

Figure 15 Selecting the project and interviewers

The screen will update and display the number of interviewers that are assigned to each survey in the Survey Status column, and the number of surveys each interviewer is assigned to in the Interviewers Status column.

Note: If an interviewer has collected and synchronized response data for a survey and is then re-assigned and replaced by a different interviewer, then the synchronized data for that survey will be transferred to the new interviewer. If the data has not yet been synchronized when the original interviewer is removed from the survey, then the system cannot know that this data exists. The response data collected by the original interviewer will then be stored in the interviewer console. To retrieve this data, you must re-assign the original interviewer to the survey and synchronize the console so that the data is transferred to the server. You can also delete the data when removing the interviewer (see (see Deleting Interview Data on page 17 for more information) for more information).

The project IDs of the surveys to which an interviewer has been assigned are displayed in the Assigned Surveys column in the Interviewers frame.

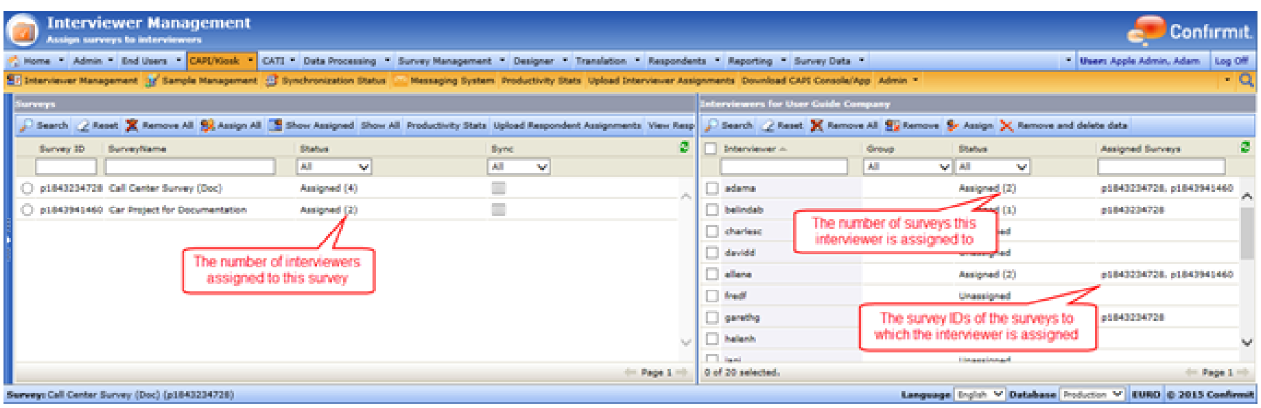

Figure 16 Assigning interviewers to a survey

The buttons in the Surveys frame are as follows:

- **Search** – in the event the list is extensive, you can add search criteria to the appropriate fields and click this button to reduce the list to a manageable size.
- **Remove All** – all interviewers that are assigned to the selected project will be removed.
- **Assign All** – all interviewers listed in the Interviewers frame will be assigned to the selected survey.
- **Show Assigned** – the Interviewer frame will be updated and only those interviewers who are actually assigned to a project will be displayed in the list.
- **Show All** – after you have clicked Show Assigned, click this button to re-display the entire list.

- **Productivity Stats** – click to open the Productivity Stats page.
- **Upload Respondent Assignments** – you can upload respondent assignments to simplify the management of larger field forces, for example where a large number of respondent assignments may need to be made at regular intervals (see (see Sample Management on page 18 for more information) for more information).
- **View Respondent Reassignment Log** – the Respondent Reassignment log displays details of respondent records that have been re-assigned from one interviewer to another, where data exists on the original interviewer's device. The administrator can then make a decision on whether or not to re-assign them back to the original interviewer (see (see How to Re-assign Respondents to Different Interviewers on page 23 for more information) for more information).

The buttons in the Interviewers frame are as follows:

- **Search** – in the event the list is extensive, you can add search criteria to the appropriate fields and click this button to reduce the list to a manageable size.
- **Remove All** – select a project in the Surveys frame, select one or more interviewers in the Interviewers frame and click Remove All to remove all allocated projects/surveys from the selected interviewers. They will then no longer have access to any surveys. The status columns in both frames will be updated to reflect the changes.
- **Remove** – select a project in the Surveys frame, select one or more interviewers in the Interviewers frame and click Remove to remove the selected project/survey from the selected interviewers. They will then no longer have access to this survey.
- **Assign** – select a project in the Surveys frame, select one or more interviewers in the Interviewers frame and click Assign to assign the selected interviewers to that project.
- **Remove and delete data** – when removing an interviewer from a project, if you also wish to delete the data that interviewer has collected for that project, click this button (see (see Deleting Interview Data on page 17 for more information) for more information).

Note: This action will only delete data from the console; it will NOT delete the data that has been collected in the survey database.

4.1.2. Deleting Interview Data

When an interviewer is removed from a project, you can also delete from the console any data collected by that interviewer for that project. This action allows you to reduce the amount of respondent data that is stored on CAPI console.

To delete data collected by an interviewer

1. In the Interviewer Management window, select the project and the interviewer you wish to remove from that project, and click **Remove and delete data**.

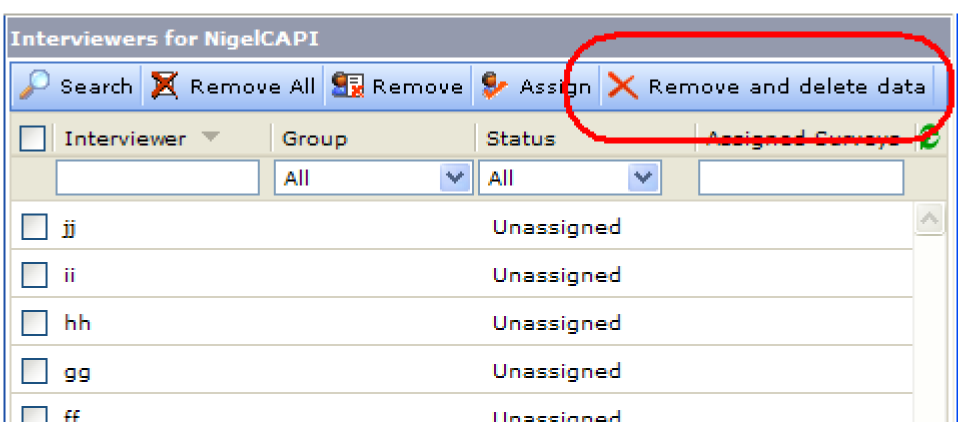

Figure 17 The Remove and delete data button

When the console is next synchronized and the assignment is removed, the data will also be deleted.

Completed and successfully uploaded respondents are removed from the app (see Interview and Respondent Life Cycle on page 41 for more information).

Note: As this operation will result in data being deleted from the CAPI App (not the database), you are prompted to select both the project and the interviewer(s) at the same time.

4.1.3. The Project Right-Click Menu

Select a project and right-click on it to open a drop-down menu.

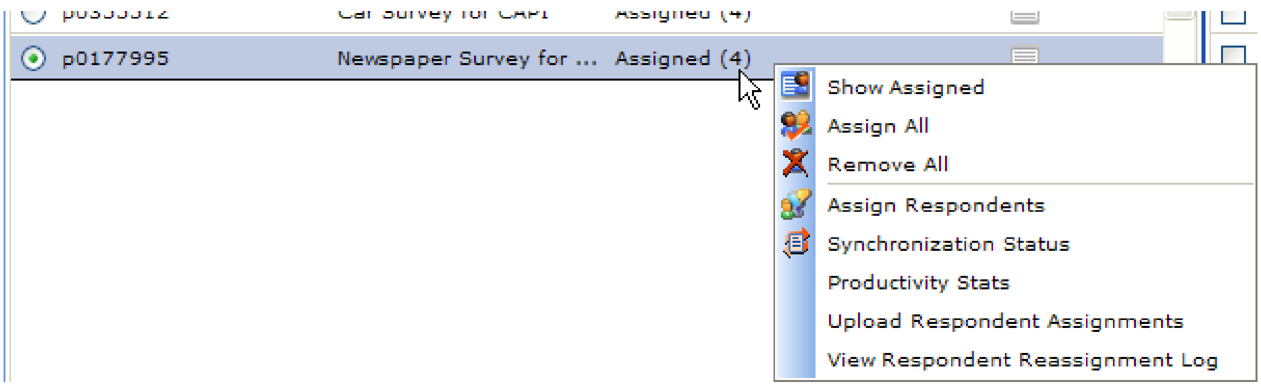

Figure 18 The Project right-click menu

Here you have menu access to three functions from the Interviewer Management frame, **Show Assigned**, **Assign All** and **Remove All**, and in addition you have direct access to functions from the Sample Management window (see Sample Management on page 18 for more information) and Synchronization Status functionality (see Synchronization Status on page 27 for more information) for the current project.

4.2. Sample Management

If you have a survey for which a known sample (set of respondents) has been uploaded, and these respondents are to be interviewed offline by a specified number of CAPI interviewers, you can divide the sample among the interviewers such that each respondent is assigned to a specific interviewer.

In the following example, the respondents will be assigned to interviewers based on a variable that has been uploaded along with the respondent file. The variable used in this case is “region”, or the respondents’ place of residence.

To divide a sample between specific interviewers

1. Go to the **CAPI/Kiosk > Sample Management** menu command.

   The page shown below opens.

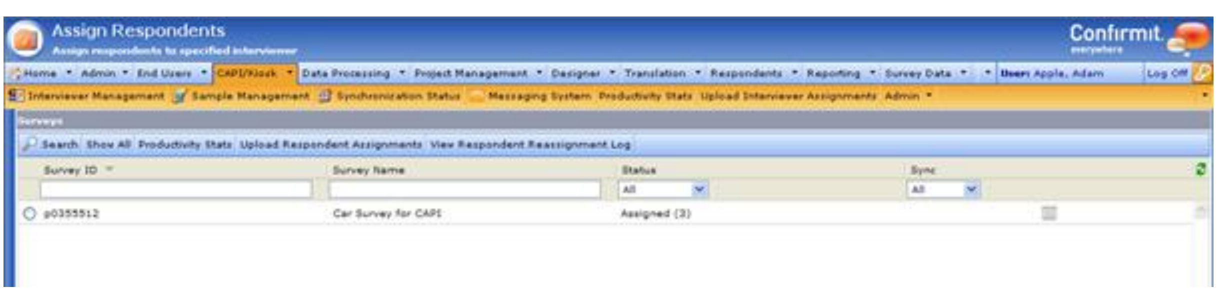

Figure 19 Example of the Sample Management page

The page lists all the surveys that have been launched as CAPI surveys and to which the CAPI administrator has access. The list is searchable, and you can sort it in descending or ascending order by clicking on the column titles (Survey ID, Survey Name).

2. Select a survey and right-click on it to open a drop-down menu with the following commands:

   - **Assign Respondents** – opens the interface in which you assign to interviewers the respondents who are uploaded into the project.
   - **Set Columns for Project** – opens the Set Default CAPI Columns interface. This allows the project administrator to specify the respondent information columns that are to be displayed in the CAPI console. This overrides for the project, the company default setting specified by the administrator (see Default Respondent Data Columns on page 37 for more information).
   - **Interviewer Management** – opens the **CAPI/Kiosk > Interviewer Management** window (see Interviewer Management on page 15 for more information).
   - **Synchronization Status** – shows the status for the current project.
   - **Productivity Stats** – click to open the Productivity Stats page (see Productivity Statistics on page 30 for more information).
   - **Upload Respondent Assignments** – you can upload respondent assignments. This simplifies the management of larger field forces, where a large number of respondent assignments may need to be made at regular intervals (see How to Upload Respondent Assignments on page 22 for more information).
   - **View Respondent Reassignment Log** – the Respondent Reassignment log displays details of respondent records that have been re-assigned from one interviewer to another, where data exists on the original interviewer's device. The administrator can then make a decision on whether or not to re-assign them back to the original interviewer (see The Respondent Reassignment Log on page 24 for more information).

3. Select **Assign Respondents**.

   The Assign Respondents window opens. This window comprises two areas; the area to the left lists the interviewers who have been assigned to the current survey, and the area to the right lists the respondents who have been uploaded into the current survey.

Note: If the project is also run as an open project where interviewers can choose the respondents, these respondents will also be listed here.

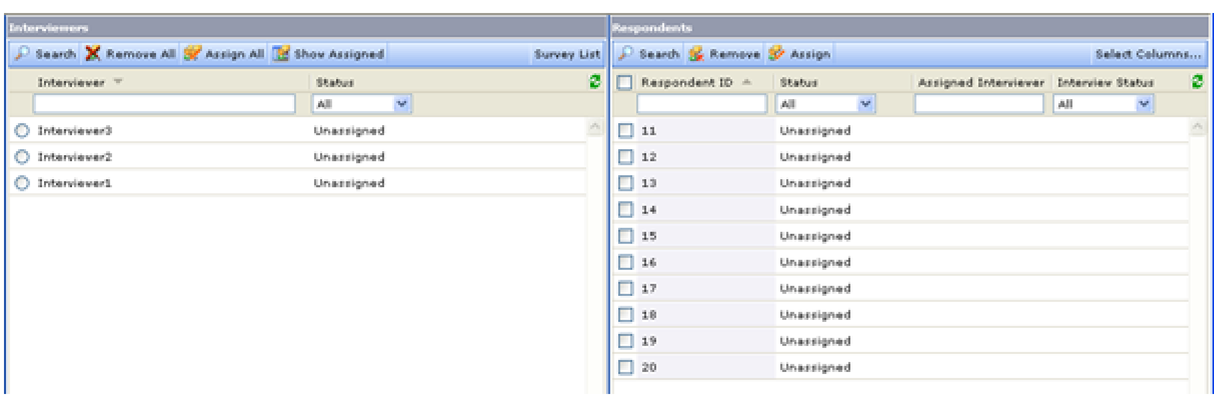

Figure 20 Example of the Assign Respondents window

A field selection pop-up window is available in the Respondents frame, which enables you to select the fields from the respondent list or system fields that you want to be displayed in this frame.

4. Click the **Select Columns** button (furthest right in the button bar) to open this window.

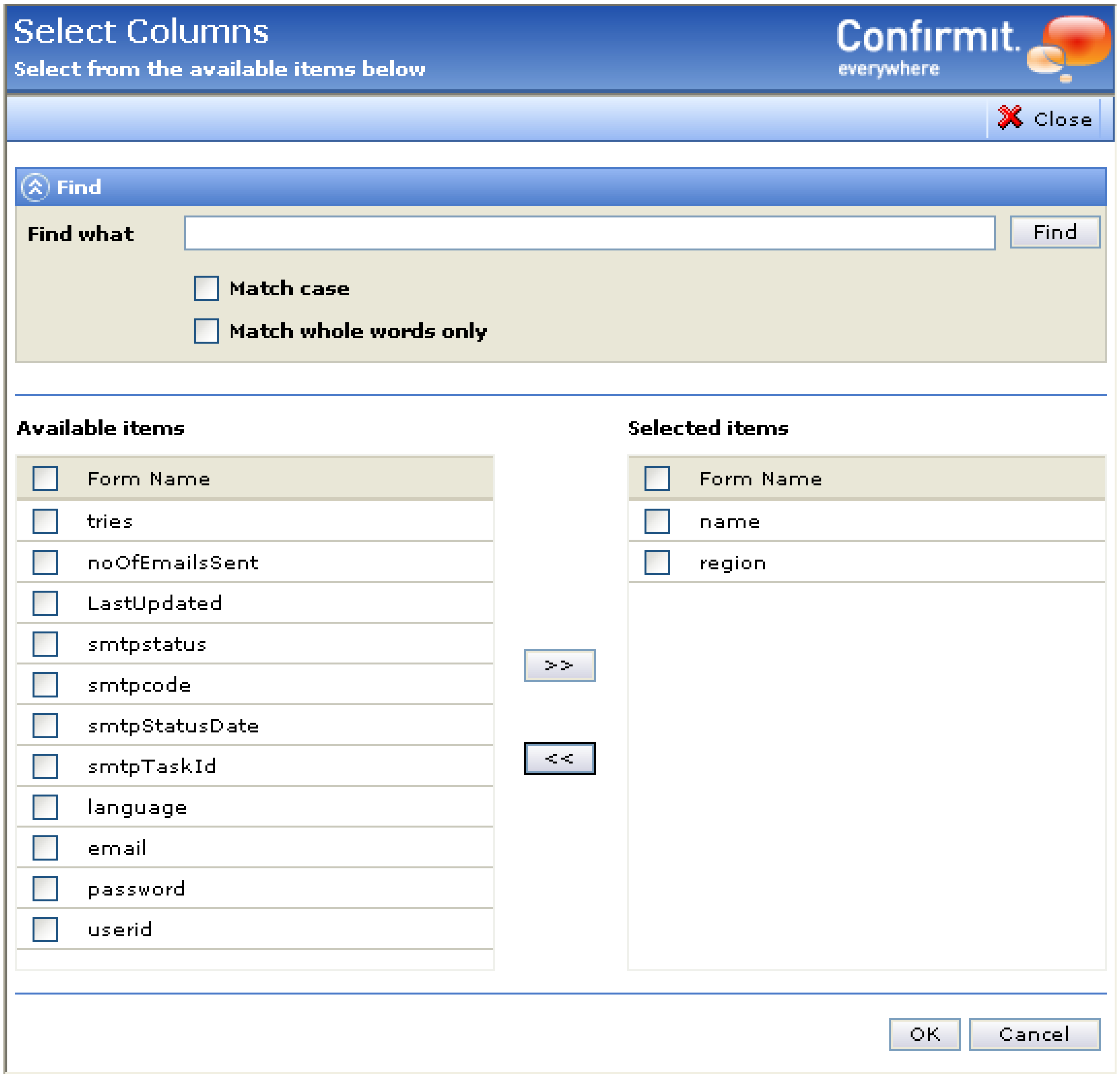

Figure 21 The Select Columns window

Assume for this example that we need to see the respondents' names and the regions of residence so that we can assign them to interviewers based on that information.

5. In the **Available Items** column, check the boxes beside the **region** and **name** options, and click the **>>** button to move them to the **Selected Items** column. The **region** and **name** columns are then added to the list.

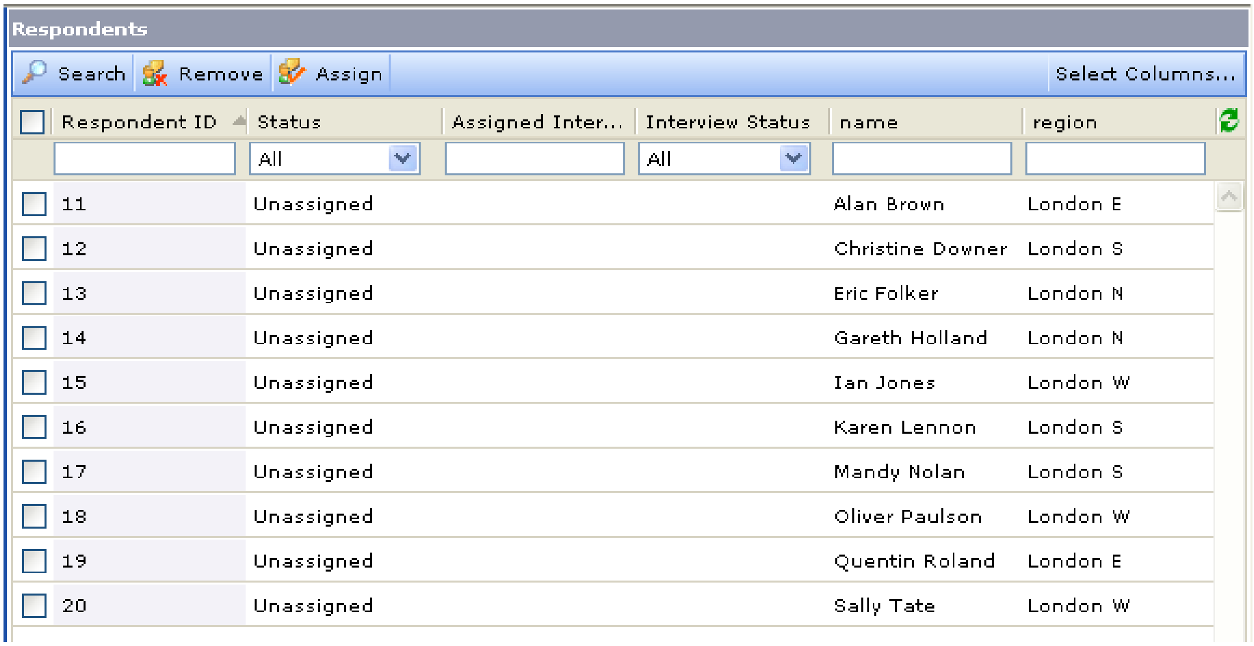

Figure 22 The Respondents list with the required columns displayed

6. Assign the respondents to the interviewers using the appropriate function:
    - Select an interviewer and some respondents and click **Assign** to assign the respondents to the interviewer.
    - Select an interviewer and click **Assign All** to assign all the respondents to the interviewer.
    - Select an interviewer and click **Remove All** to remove all respondents from that interviewer.
    - Select an interviewer and click **Show Assigned** to update the Respondent frame and show the respondents who are assigned to the current interviewer.
    - Click **Survey List** to go to the first screen in Sample Management, where all surveys are listed, so that you can choose another survey and assign respondents to interviewers in that survey.
    - Select respondents who are already assigned to interviewers and click **Remove** to remove those respondents from the interviewer.

Note: Right-click on an interviewer to open a drop-down menu from which you can execute three of the actions that are described above: Assign All, Remove All, and Show Assigned.

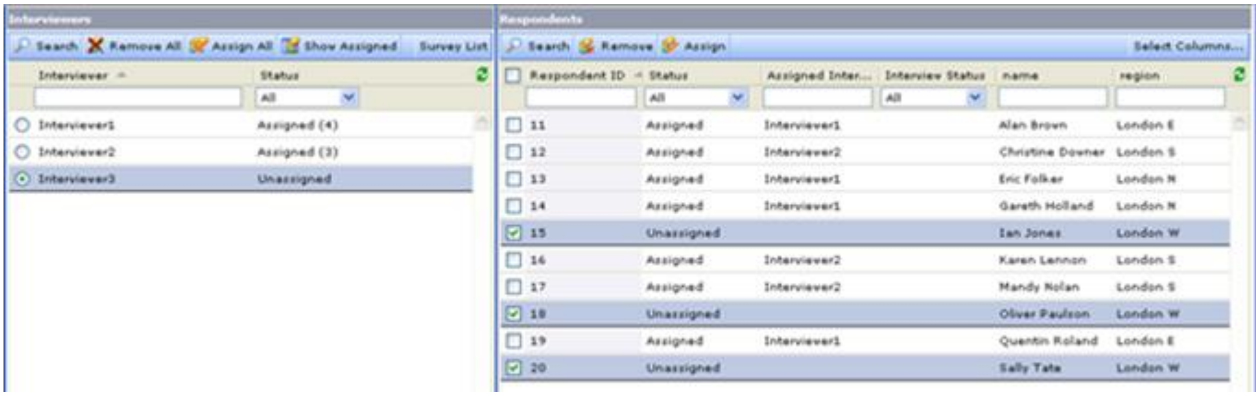

Figure 23 Assigning respondents to interviewers

In the example above, “Interviewer1” will visit respondents in London East and North, “Interviewer2” will visit respondents in London South and “Interviewer3” will visit respondents in London West. The CAPI administrator is about to assign the respondents residing in London West to the interviewer “Interviewer3”.

Select a respondent and right-click on it to open a drop-down menu offering the same options as the buttons.

4.2.1. How to Upload Respondent Assignments

The ability to upload respondent assignments simplifies the management of larger field forces, where a large number of respondent assignments may need to be made at regular intervals. In addition, it simplifies the ability to integrate with larger companies existing sample management systems.

You can upload assignments from a tab-delimited text file, with column headings in the first row. The data file must contain the following headings: **interviewer** and **respondentid**. '**interviewer**' refers to the 'User name' field from the CAPI interviewer end user list, '**respondentid**' refers to the ID of the sample record project. All texts are case-sensitive.

Note: You can also remove respondent assignments. If the 'interviewer' field is empty, the task will remove the assignment for that respondent ID.

To upload respondent assignments:

1. Go to the **CAPI/Kiosk > Sample Management** menu command.

   The Assign Respondents page opens.

2. In the Surveys list, select the project you wish to upload the assignments to.

3. Click **Upload Respondent Assignments**.

   The Upload Settings dialog opens.

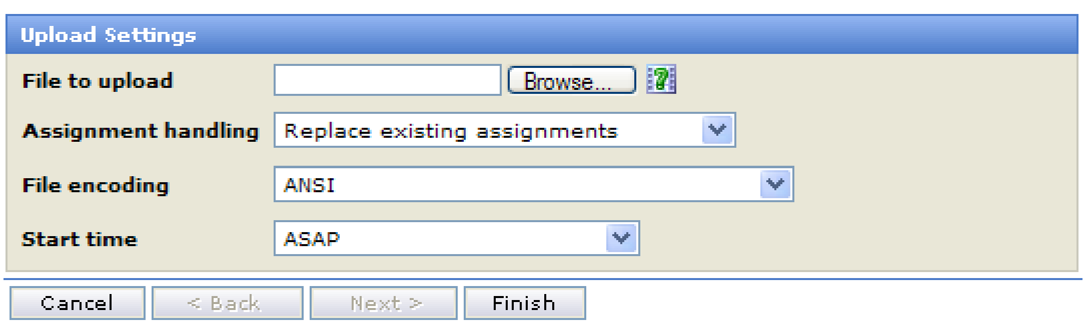

Figure 24 The Upload Settings dialog

4. Browse to and select the file you wish to upload.
5. Select how you wish the assignments to be handled.

   The upload can operate in one of two modes: The default behavior replaces any existing assignments, or you can select to leave existing assignments intact (to avoid accidentally re-assigning respondents to different interviewers).
6. Select the type of encoding used for the file.
7. Select the start time and any required recurrence.
8. Click **Finish**.

   The task will be performed as selected and at the time selected.

4.2.2. Automatic Assignment of Respondents to Interviewers during Respondent Upload

When loading respondent data into the system for a CAPI survey, you can assign the respondents to CAPI interviewers automatically. To do this the uploaded respondent tab delimited file must have a specific column included called **capiinterviewerid**. Note that it is optional to include this column, but if it is included then a value is mandatory. That is, the column cannot be empty. The value entered must correspond to the numeric internal 'User ID' allocated to the CAPI interviewer in the end user list.

For example, in the figure below User5 would need a value of **34287** to be automatically assigned to this respondent during respondent upload.

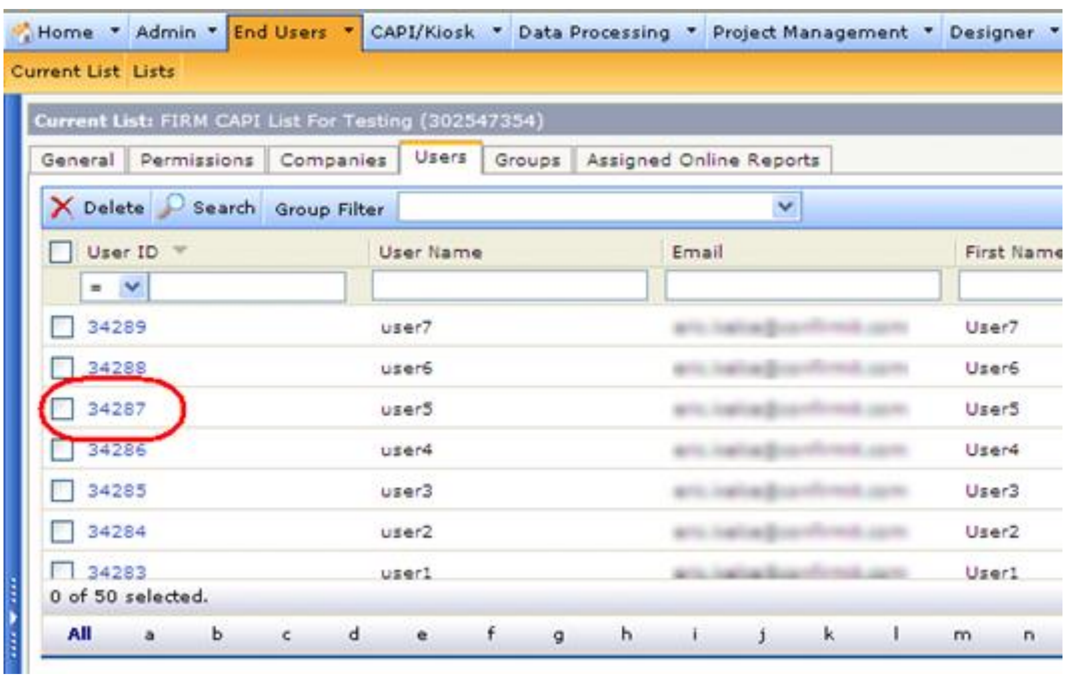

Figure 25 Example of a User ID to be used when automatically assigning respondents to interviewers

4.2.3. How to Re-assign Respondents to Different Interviewers

If for any reason you must change the interviewer who is assigned to a particular respondent, proceed as follows:

Note: Any respondent data that has been collected by the first interviewer and that has been synchronized with the server, will be transferred to the replacement interviewer when that interviewer next synchronizes, thereby enabling him/her to continue postponed surveys. Data that has not been synchronized when the first interviewer is reassigned will not be available to the new interviewer. During later synchronizations, only data for respondents currently assigned to that interviewer will be transferred. If a respondent is reassigned before collected data is synchronized, then that data will be marked as deleted (soft-deleted) in the console. To retrieve this data, reassign the respondent to the interviewer.

1. Go to the **CAPI/Kiosk > Sample Management** menu command.

   The survey list opens.

2. Select the survey you wish to work with, right-click on it and select **Assign Respondents** from the menu.

   The Interviewer and Respondent lists open.

3. In the Respondents list, select the respondents you wish to re-assign to a different interviewer.
4. In the Interviewers list, select the interviewer to which you wish to assign those respondents.
5. In the Respondents list, click **Assign**.

   A confirmation message appears.

6. Click **OK** to continue or **Cancel** to cancel the operation.

   If you click **OK**, a warning message appears:

   - If any of the selected respondents have the status Completed, Screened or Quota Full, then these respondents will not be re-assigned.
   - Any data that has been collected for the selected respondents, that has not yet been synchronized, will not be transferred to the new interviewer. You are therefore advised to synchronize before reassigning respondents.

7. Click **OK** to continue or **Cancel** to cancel the operation.

   If you click **OK**, the selected respondents are transferred to the new interviewer.

4.2.4. The Respondent Reassignment Log

This log displays details of respondent records that have been re-assigned from one interviewer to another, where data exists on the original interviewer’s device. The administrator can then make a decision on whether or not to re-assign them back to the original interviewer. The log simplifies the process of recovering data from interviewers who were previously assigned to an interview record but who have been removed.

Scenario's where this log may be useful include:

- The interviewer has records assigned but then is off sick and therefore records are centrally re-assigned to another interviewer.
- The interviewer has records assigned but then has technical difficulties meaning that he/she cannot synchronize and therefore records are centrally re-assigned to another interviewer.
- An interviewer has not synchronized for a long time and records have been re-assigned to another interviewer.
- Any other scenario where an interviewer is unable to synchronize to the server.

The log includes filtering and sorting capabilities, and summarizes the previous and existing assigned Interviewer. Administrators can select records, either individually or in groups, and revert ownership back (by clicking on the '' button in the menu).

1. Go to the **CAPI/Kiosk > Sample Management** menu command.
2. Select the survey you wish to see the log for.
3. On the Assign Respondents page, click **View Respondent Reassignment** Log.
4. Select the record(s) of interest and click **Revert Ownership**.

The reversion will take effect the next time the console is synchronized by the interviewer.

Important
This log does NOT allow for any merging data capabilities; there can still only be one record stored on the server.

4.2.5. Quota Management in CAPI Surveys

In CAPI surveys with quotas, you can divide the number of respondents required for each quota among the interviewers who are assigned to this survey. This chapter only describes the CAPI-specific functions of quota management. Refer to the Professional Authoring or Survey Designer User Guide for more details.

When a survey is launched as a CAPI survey, a folder called **Capi Specific** is added to the survey. The folder contains one single question “capiInterviewerId” and a script node “record capiInterviewerId”.

Note: The single question “capiInterviewerId” must not be modified.

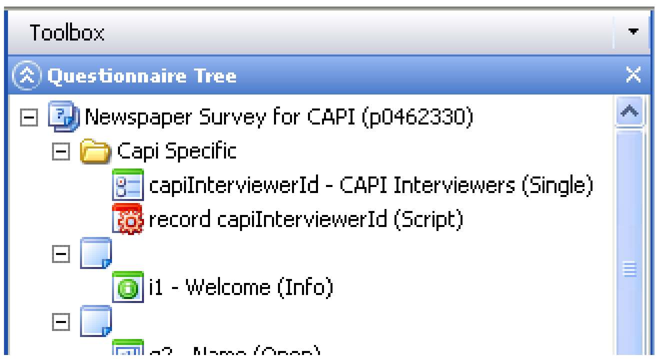

Figure 26 Example of CAPI-specific objects in the survey

These CAPI-specific objects set the CAPI Interviewer ID in the survey, and they can be used in for example quota management to insert the interviewer identification into the quotas.

When you set up a quota, for example on Gender in our example (refer to the authoring application User Guide for information on how to set up quotas), you can also drag the “capiInterviewerId” question into the quota and distribute the quota among the interviewers.

Figure 27 capiInterviewerID in a quota

Double-click on the quota or right-click and choose **Edit** to display the cells in grid format for each variable in the question by each interviewer.

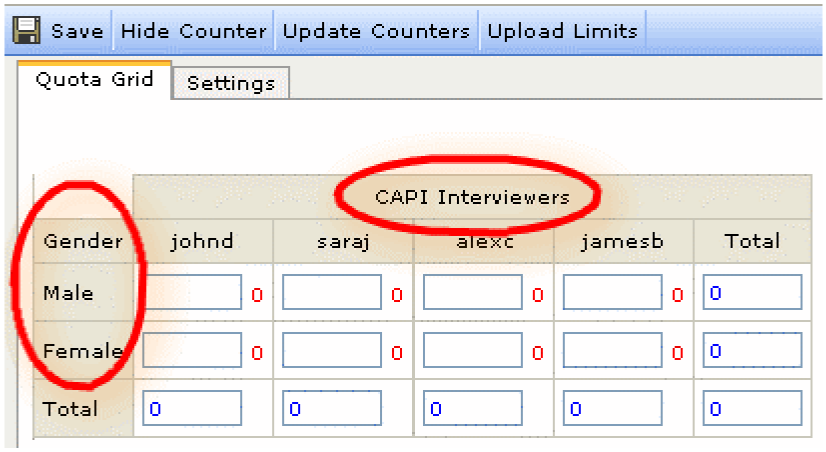

Figure 28 Example of a quota distribution grid

The variables "Male" and "Female" are displayed as rows and the assigned interviewers as columns in the quota grid, with cells for both "Male" and "Female" available.

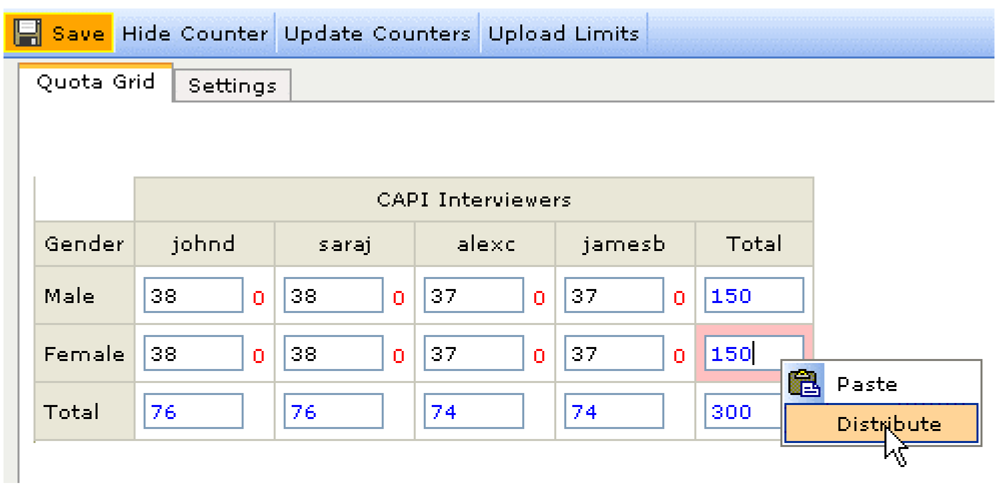

Figure 29 Example of distributed quotas (1)

You can fill in the quota limits in the Total column for each variable, then right-click and choose Distribute. The number in the Total column will then be distributed evenly amongst the interviewers. If some interviewers are to interview respondents for only one variable, for example only "Male", you can change the quota limits manually. The Total cells are updated automatically.

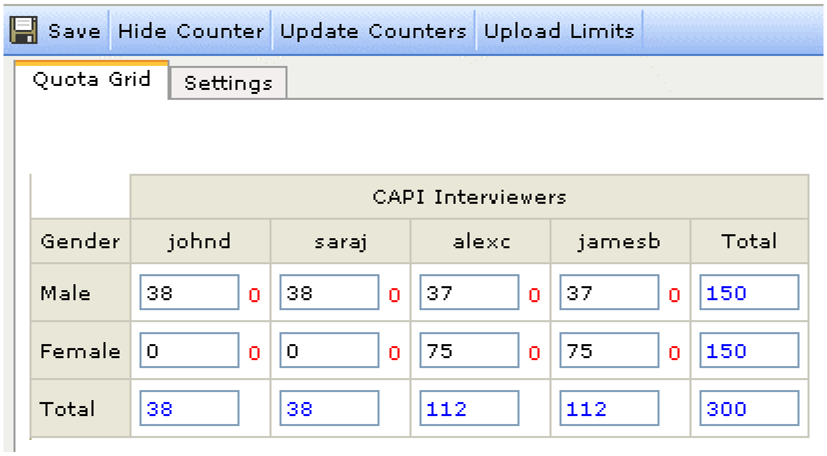

Figure 30 Example of distributed quotas (2)

When an interviewer has filled up the quota, an email is sent to the address entered in the quota Settings. Information about the quota and the CapiInterviewerId will be included in the email.

Respondents who are registered with status Quota full will be displayed in the Survey homepage/information page.

Refer to the authoring application's user guide for more details on Quotas and Quota Management.

4.3. Synchronization Status

CAPI supports the following synchronization tasks when the interviewer device is connected to the Internet:

- New or updated surveys are downloaded to the interviewer device, including any graphics and multimedia elements that are included in the survey.
- Personal quotas and samples are downloaded to the interviewer devices.
- Response data is uploaded from the console to the central servers.
- Files are transferred to/from the file library.

Note: All data flowing between CAPI App and the centralized server is encrypted.

When you have assigned surveys to interviewers, and the surveys are live, every time you make a change in a survey and re-launch it the interviewers will need to download the new version of the surveys during synchronization. The same applies to response data; as the interviewers collect data and send it to Forsta Plus, the CAPI administrator may need to track how many complete or incomplete responses each interviewer has gathered and transferred.

To track the number of gathered/transferred responses:

1. Go to **CAPI/Kiosk > Synchronization Status**.

   The Synchronization Status page opens.

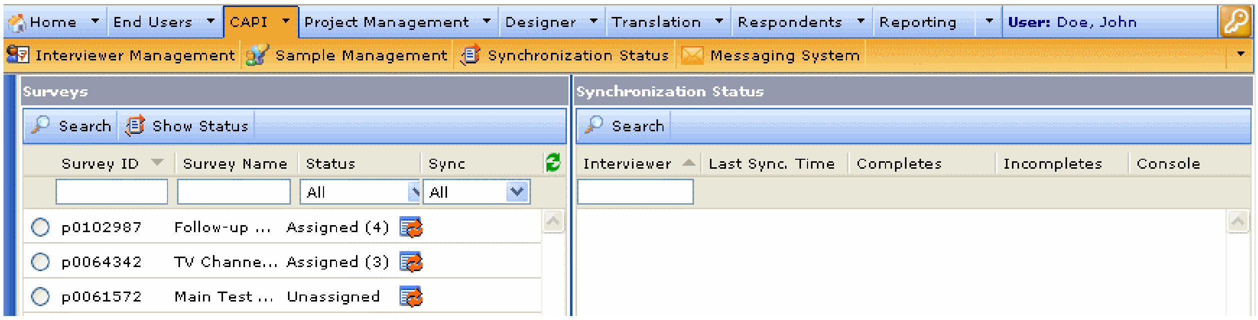

Figure 31 Example of the Synchronization Status page

The frame on the left displays all surveys that have been launched as CAPI surveys and to which the CAPI administrator has access. The list is searchable, and you can sort it in descending or ascending order by clicking on the column titles (Survey ID, Survey Name). The Sync column will show for each survey whether or not synchronization is enabled (see How to Enable and Disable Synchronization on page 28 for more information).

4.3.1. How to Enable and Disable Synchronization

By default, all CAPI surveys have Synchronization disabled. This means that the user or administrator must enable synchronization before the interviewer console can be synchronized with Forsta Plus.

To enable and disable synchronization:

1. Either go to the **CAPI/Kiosk > Interviewer Management** menu command (the Interviewer Management page opens),

   Or

   Go to the **CAPI/Kiosk Synchronization Status** menu command (the Synchronization Status page opens).

   In the page that opens, click the icon in the Sync column to toggle the status, then confirm the action.

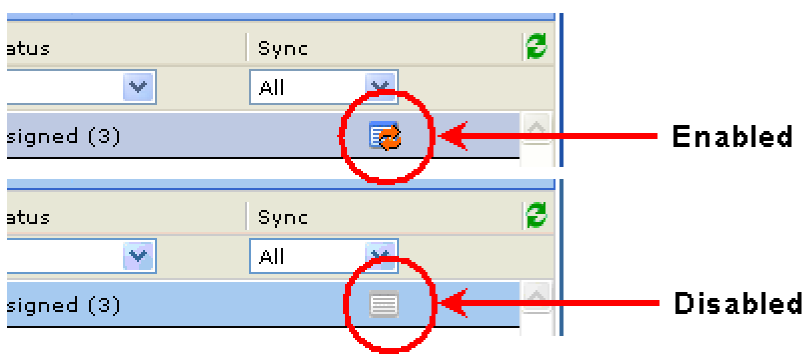

Figure 32 Enabling and disabling synchronization

When an interviewer synchronizes a console, any new surveys to which they have been assigned will be downloaded from the server and existing surveys will be updated, and any surveys from which they have been removed will be removed from the console.

4.3.2. The Synchronization Frame

The Synchronization Status frame is by default empty. To show the synchronization details of a survey:

1. In the Synchronization Status page, click on the radio button for the survey you wish to see the status for.
2. Click **Show Status**.

All interviewers who are assigned to this survey will be displayed in the Synchronization Status frame. The list shows the following information for each interviewer:

- The last time the interviewer synchronized his/her console with the centralized server (Last Sync. Time).
- The number of Completes and Incompletes that the interviewer has transferred to the centralized server.
- The Console column shows information about the console that the interviewer is using, for example to which Company on the centralized Forsta Plus server the user is attached, and if the user is online or offline.
- The Version column shows which survey version the interviewer has on the console.
- The Status column shows the survey version status. There are four statuses:
  - **Green bulb – Latest version**. Indicates that the survey currently in the console is the latest version.
  - **Yellow bulb – Old version**. Indicates that the survey currently in the console is an old version.
  - **Red bulb –No survey**. Indicates that the interviewer has not yet downloaded the survey.
  - **Unknown version** – Indicates that the survey currently in the console is an unknown version.

The illustration below shows that as yet no responses have been transferred to this survey.

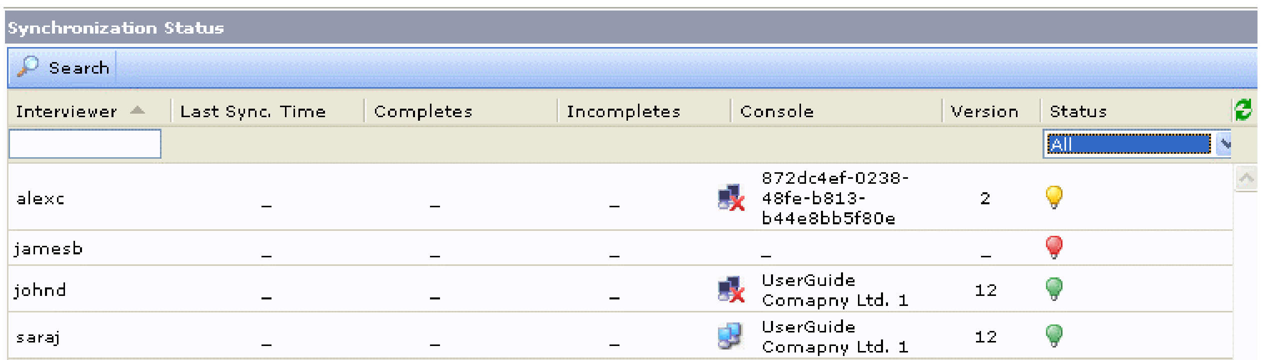

Figure 33 Synchronization Status with responses

Another example below shows that “saraj” has gathered and transferred 18 Completes and 2 Incompletes, while “johnd” has gathered and transferred only 1 Complete. “richg” has an old version of the survey.

Figure 34 Synchronization Status with responses

4.4. Productivity Statistics

The CAPI/Kiosk interface includes interviewer productivity reporting with statistics. The data presented within this report is available without the need to make any changes to the survey, and it does not rely on any specific questions within the survey. The productivity report is available from the **CAPI/Kiosk** menu and can be launched in one of two modes:

- Company-wide (across multiple surveys) (see The Company-wide Report on page 30 for more information)
- Survey-specific (see The Survey-specific Report on page 31 for more information).

The reports are essentially the same, however loading the report company-wide allows you to select the desired survey in addition to the other selection criteria.

4.4.1. The Company-wide Report

To load the company-wide report:

1. Go to the **CAPI/Kiosk > Productivity Stats** menu command.

   The Productivity Stats selection page opens as shown below.

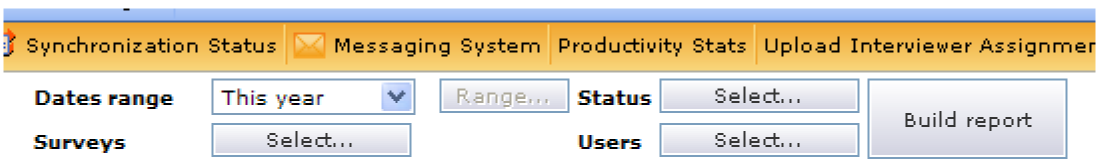

Figure 35 The Productivity Report selection page

2. Click on the various fields to open drop-down lists of the options available, then click in the appropriate check-boxes to make the required selections of dates, surveys, status and users. For each selection box, click **OK**.

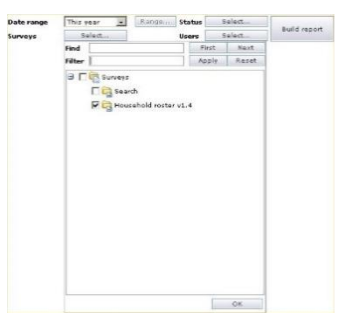

Figure 36 Example of selecting a survey

3. On completion, click **Build Report**.

   The resulting report is displayed as shown in the example below.

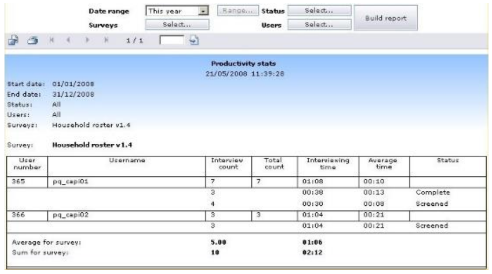

Figure 37 Example of a productivity report

4.4.2. The Survey-specific Report

To load the survey-specific report:

1. Go to the **CAPI/Kiosk > Interviewer management** or **Sample management** menu command.
2. Select the required project.
3. Click the **Productivity stats** button.

   The Productivity Stats page opens as shown below.

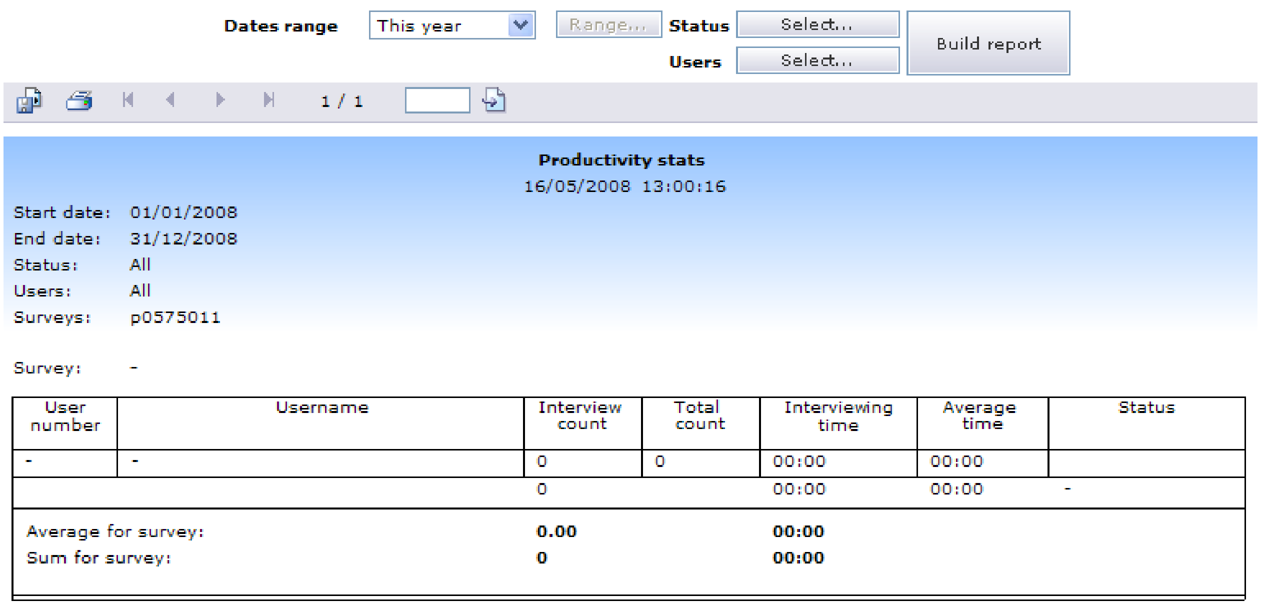

Figure 38 Example of the Productivity Stats page

4. Click on the various fields to open drop-down lists of the options available, then click in the appropriate check-boxes to make the required selections of dates, status and users.
5. On completion, click **Build Report**.

   The report is presented as for the company-wide report.

4.4.3. The Report Information

The report presents the following information:

- Header information:

- Date and time the report was run (localized to the administrator PC where browser is running).
- Start date: The selected date that the report is applicable from.
- End date: The selected date that the report is applicable to.
- Status: All selected statuses (Complete, screened, Quota fail, Error, Incomplete).
- Users: A comma-separated list of users selected or 'All' as appropriate.
- Surveys: A comma-separated list of surveys selected or 'All' as appropriate.

- Report data:
  - Survey: The name of the survey.
  - Username: The interviewer login name.
  - Interview count: Total count of interviews completed by this interviewer in the selected statuses.
  - Total count: Total number of interviewers completed by this interviewer in all statuses.
  - Interviewing time: mm:ss spent interviewing for that row.
  - Average time: Interviewing time / Interview count for this row.
  - Status: The status this row's data refers to, there will be one row per status, per interviewer that has a non zero count.
- Below the list of all users that have worked on the selected survey(s) is:
  - Average for survey: Total count / Number of interviewers in the list.
  - Sum for survey: Total count of interviews worked on for this survey.

At the top of the report is a toolbar. This allows the viewer to select a specific page in the report, go to the start/end page or jump to a specific page.

The report can be exported to any of the following formats:

- Crystal reports
- Adobe Acrobat
- MS Word
- MS Excel
- Rich Text Format

In addition, you can generate a printer-friendly version of the report such that it can be printed out.

Note: This report relies on the synchronization of productivity data. If any issues arise whilst the date is being synchronized, then a message will be displayed to the CAPI administrator during assignment and launching operations. If this should occur, a user with SYSTEM_CAPI_ADMINISTRATE permission is able to synchronize the unsynchronized data. For On-Premise customers this requires additional hardware and SQL configuration. Contact Support for further details.

4.5. Uploading Interviewer Assignments

In the event you have a large field force, where a large number of assignments need to be made on a regular basis, this function enables you to upload the assignments from a tab-delimited text file.

The data file must contain the headings **interviewer** and **projectid**. '**interviewer**' refers to the 'username' field from the CAPI end user list, while the '**projectid**' refers to the Forsta Plus project number. All texts are case-sensitive.

Note: The columns in the file to be uploaded MUST be in the order: interviewer, projectid.

To upload interviewer assignments

1. Go to the **CAPI/Kiosk > Upload Interviewer Assignments** menu command.

   The Upload Settings dialog appears.

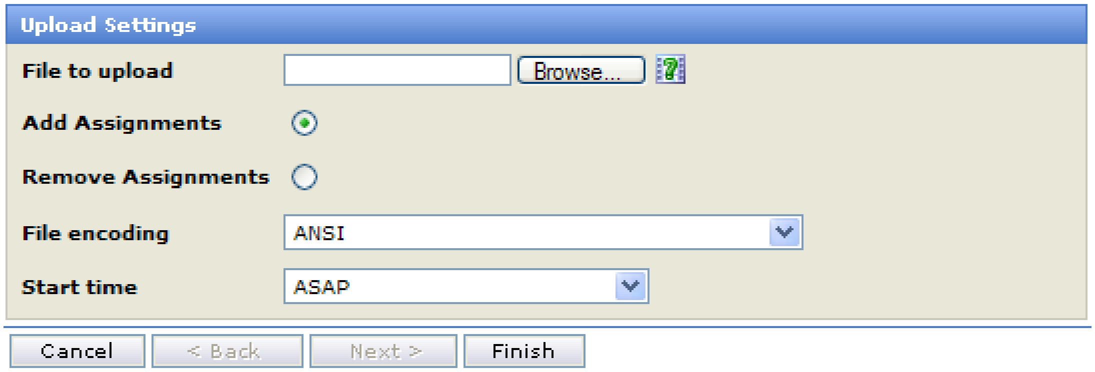

Figure 39 The Upload Settings dialog

2. Browse to and select the file you wish to upload.
3. Select whether you wish to add or remove assignments.
4. Select the type of encoding used for the file.
5. Select the start time and any required recurrence.
6. Click **Finish**.

   The task will be performed as selected and at the time selected.

4.6. Admin

This menu contains the functionality that is only accessible to the CAPI Administrator. These functions are described in the following sections.

4.6.1. Console Management

If a Forsta Plus user has the **system_capi_administrate** permission, the user will also have access to the Console Management functionality. This will normally be the same user who can generate the CAPI Activation files / codes.

This module for CAPI/Kiosk administrators provides an overview of all company consoles, their status (activated or deactivated), the ability to deactivate consoles not being used, and with the option of recording and listing relevant information on the consoles (CAPI version, operating system, owner information, contact information).

1. Go to the **CAPI/Kiosk > Admin > Console Management** menu command to open the Console Management page.
2. The latest console and Android versions are given at the top of the page.
3. Use the **View Mode** drop-down to select **Console Information** or **Synchronization Schedule**.

Note: The ability to schedule synchronization is not supported by the CAPI app.

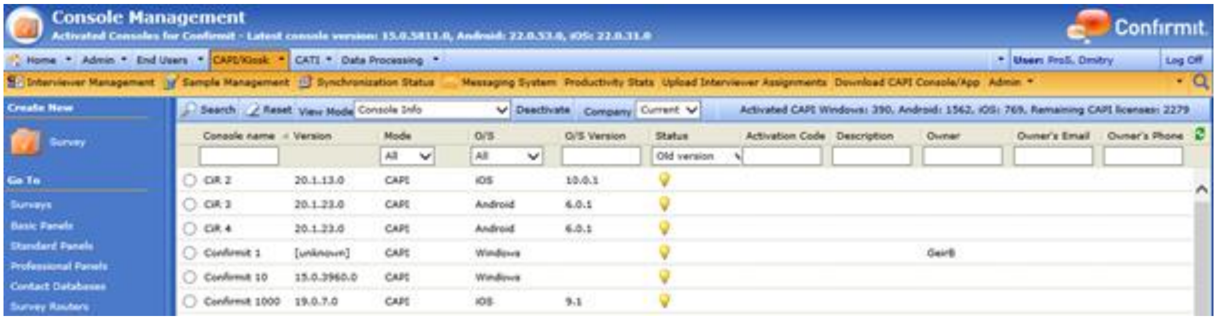

Figure 40 Example of the Activated Consoles page

This page lists all CAPI/Kiosk consoles that are activated for the company. All columns are searchable and sortable.

- **Console name –** the name of the console.
- **Version –** information about which CAPI/Kiosk version is installed on the console.
- **Mode –** whether the console is in CAPI or Kiosk mode.
- **O/S -** indicates the operating system in use for that console or device.
- **Status –** whether the console has the most recent version of CAPI installed or an older version.
- **Activation code -** shows an activation code used by a CAPI app
- **Description, Owner, Owner's Email, Owner's Phone –** fields for additional information.

The number of activated licenses listed by operating system, and the number of available licenses remaining, are displayed at the right end of the page toolbar.

4.6.1.1. How to Edit the Console Details

You can enter the details of each console, for example its name or registration number, the name of the owner/current user, the CAPI version installed etc. into the system.

1. In the Activated Consoles list, select a console, right-click on it, then choose the **Console Details** option from the menu.

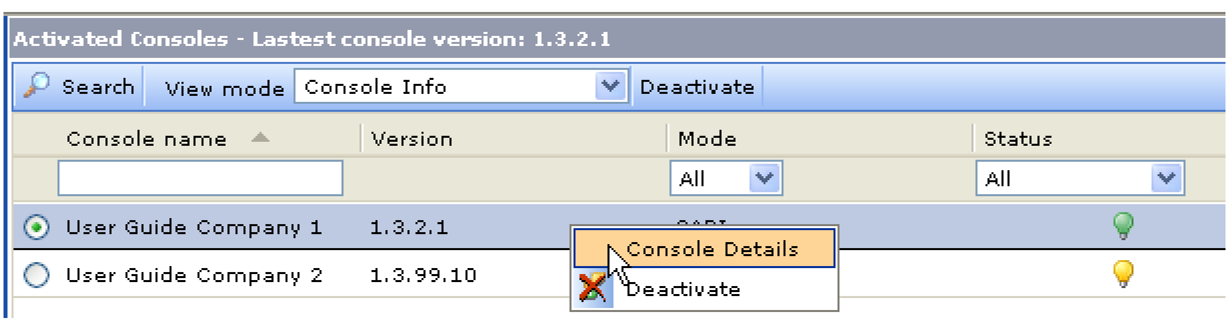

Figure 41 Opening the Console Details frame

A new frame opens towards the right side of the window.

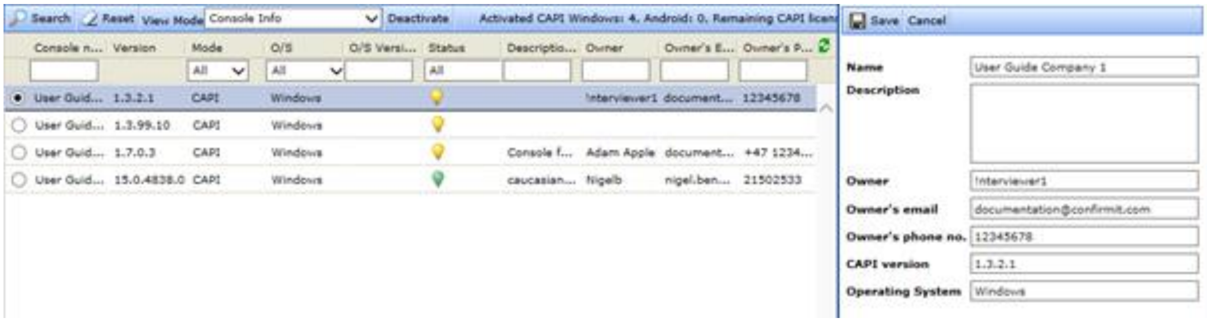

Figure 42 Example of the Console Details frame

2. Enter the console details and other information as required.
3. On completion, click **Save** to save the information.

   When you click **Save**, the information is displayed in the various fields as appropriate in the Activated Consoles frame.

4.6.1.2. How to Deactivate a Console

In the Activated Consoles list, select the console you wish to deactivate, right-click on it and select **Deactivate** from the menu.

The selected interviewer console is deactivated and the interviewer will not be able to log on to the console. A license is freed, allowing a different console to be activated if required (see Installing and Activating CAPI App on Interviewer Devices on page 4 for more information).

4.6.1.3. View Mode > Synchronization Schedule

Note: The ability to schedule synchronization is not supported by the CAPI app.

4.6.2. Console Activation

This menu command opens the CAPI/Kiosk Activation page for sending activation files to the console administrators (see The App Activation Code on page 6 for more information).

4.6.3. Synchronization Log

On this page, you can view a log of the console synchronization operations that have been performed for the various consoles in your company. The log shows details such as console name, interviewer name, the synchronization start time, the duration of the synchronization task, the number of responses transferred, status of the synchronization etc.

Note: You must have System_Administrate or System_Capi_Administrate permission to access this menu command.

To view the synchronization log

1. Login to Forsta Plus.
2. Go to the **CAPI/Kiosk > Admin > Synchronization Log** menu command.

   The CAPI Console Synchronization Log page opens. This page shows all the synchronization operations performed for your company.

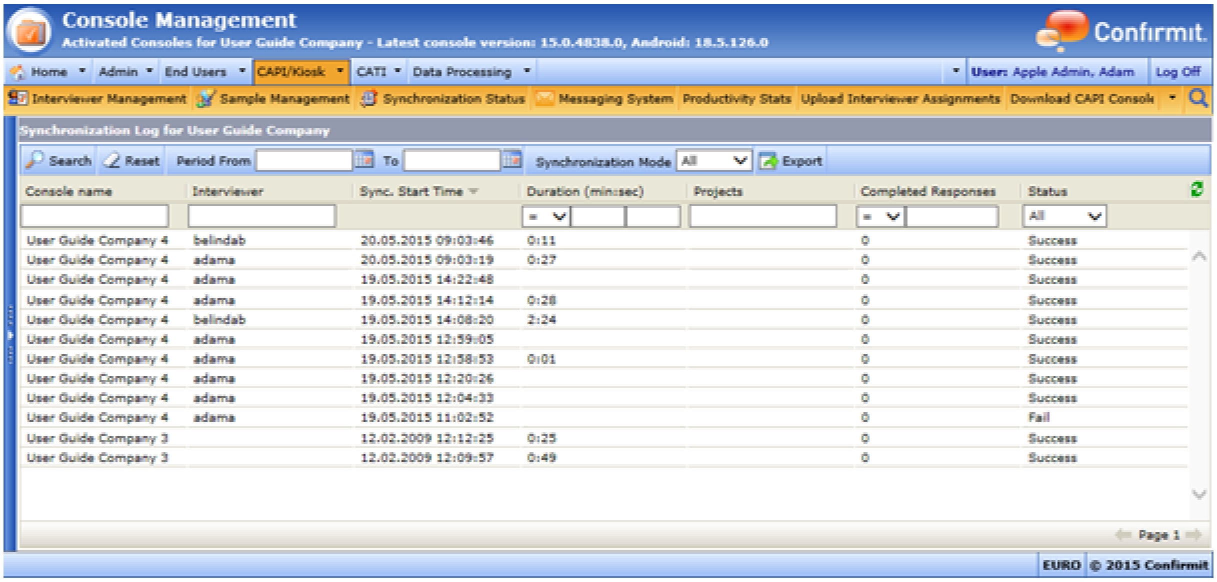

Figure 43 Example of a Console Synchronization Log page

"Project ID - pxxxxxx" will be displayed in the Projects column when responses have been synchronized over to the server.

3. If the list is extensive or you are looking for particular details, you can filter the list by entering dates into one or both of the date filter fields. You can also specify whether you wish to view all synchronization tasks, only those tasks that were initiated automatically, or only those that were initiated manually.

4. You can export the list via email (see How to Export the Synchronization Log on page 36 for more information).

4.6.3.1. How to Export the Synchronization Log

To export the list via email:

1. On the CAPI Console Synchronization Log page, click **Export**.

   The Export CAPI Console Synchronization Log overlay opens.

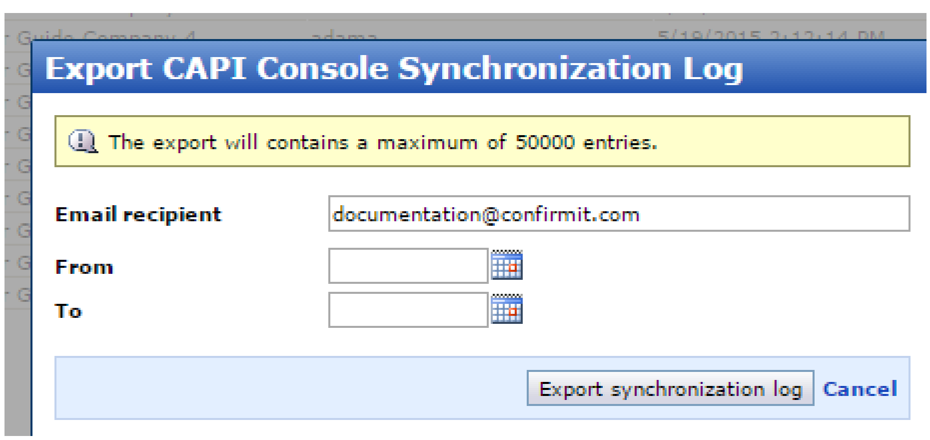

Figure 44 The Export CAPI Console Synchronization Log overlay

2. As required, edit the email address to which the log is to be sent. The default address is that of the currently logged on user - you.
3. If you wish to export only a subset of the logged items, set the date filters as required.
4. Click **Export synchronization log**.

   The log is downloaded as a zipped, tab-delimited .txt file, and the file is attached to an email and sent to the specified address.

4.6.4. Default Respondent Data Columns

This functionality enables administrators to specify a default list of respondent information columns that are to be displayed in the CAPI consoles under View Respondents. This is a company-wide default list that will apply for all projects; however the company default setting can be overridden for individual projects and consoles as required.

Note: If the company-wide default settings are overridden for an individual project, then any later changes to the default settings will not be applied to that project.

In the event no information columns are specified in either the company's Default Respondent Columns page or the projects Set Default CAPI Columns page, then after synchronization the CAPI console will display the "system default" columns. These are; ID, Interview Start Time, Interview End Time, Status, Description Respondent Source and Deletion Status. The console will therefore never display a respondent list with no information columns.

4.6.4.1. How to Set Up the Company Default

1. Go to the **CAPI/Kiosk > Default Respondent Columns** menu command.

   The Default Respondent Columns page opens. Here you can enter a list of columns that you wish to be displayed as default in the company's CAPI consoles.

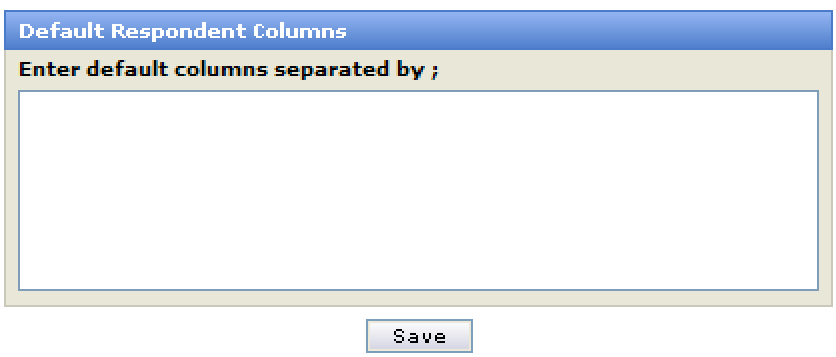

Figure 45 The Default Respondent Columns page

2. Type into the field the columns you wish to be displayed as default, separated by the ; character (see the figure below for an example), and click **Save**.
3. While typing in the column names, the following points must be noted:
   - The column names are not case-sensitive.
   - To specify the "Interview start time", type in interview_start.
   - To specify the "Interview end time", type in interview_end.

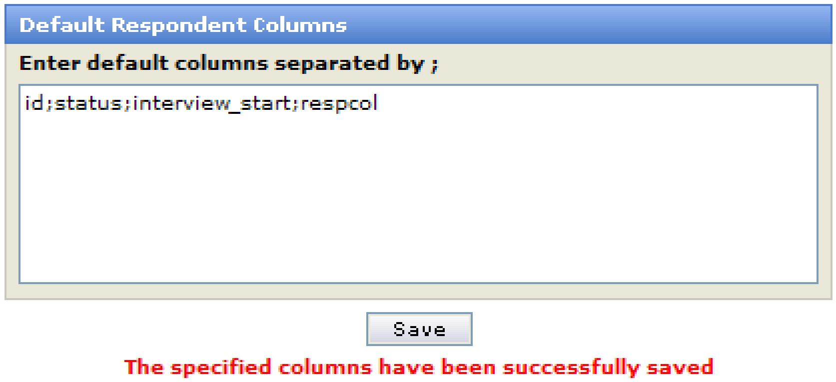

Figure 46 Example of a list of default columns

The company default setting is now defined, and this will be exported to the individual CAPI consoles the next time the consoles are synchronized. You can go into individual projects and override the company default setting if required.

4.6.4.2. How to Change the Default for a Specific Project

1. Go to the **CAPI/Kiosk > Sample Management** menu command.
2. In the Assign Respondents window, click on the radio button for the required survey to select it, then right-click on the survey and select **Set Default Columns** from the menu.

   The Set Default CAPI Columns for Project page opens.

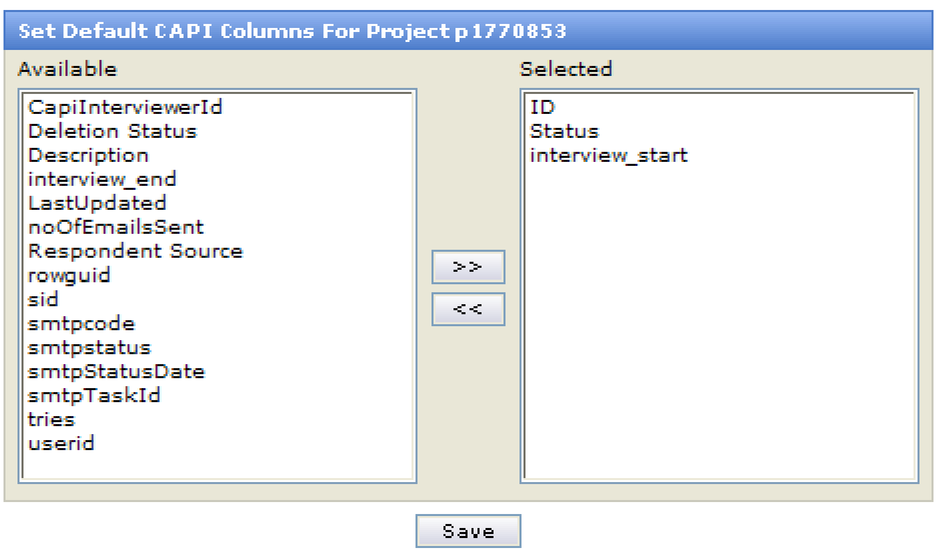

Figure 47 Example of the Set Default CAPI Columns for Project page

This page lists the available columns and those you have specified to appear as default (earlier in the procedure). Note that if you have specified columns that do not exist in the survey, then those columns will not appear in the Selected list.

Note that you can override the default selection you have made at any time by adding or removing columns from the default set. To do so:

3. In the Available list, using standard Windows techniques, select the column or columns you wish to include as default.

4. Click the **>>** button to move them to the Selected list.
5. If you wish to remove columns from the Selected list, select them in this list and click the **<<** button.
6. Click **Save** to save the changes.

Note: If you change the default column setup for an individual project by going to the Set Default CAPI Columns… page as described here, then that project will no longer be influenced by the setup in the Default Respondent Column page. This means that any later changes to the Default Respondent Column page will not be applied to this project.

7. The default column setup for the project is complete. The CAPI interviewer console(s) must now be synchronized to reflect the changes (see Interview and Respondent Life Cycle on page 41 for more information). Note that the console user (the interviewer) can also change the setup on their console if required (see Default Respondent Data Columns on page 37 for more information).

4.7. The File Library

The File Library is an area in Forsta Plus that is allocated to the users/interviewers, in which files can be stored. This area can be used to transfer files to and from the interviewer devices (see Files in CAPI Surveys on page 13 for more information).

If files stored in the File Library are to be transferred to the devices during synchronization, then the files must stored as described later in this section (see How to Transfer Files to a Specific Interviewer Console on page 39 for more information). If a file is deleted from the File Library, then that file will also be deleted from the devices during the next synchronization.

Note: Each company is allocated its own File Library area, and a company's File Library can be accessed by all users within the company. This means that if there are several Forsta Plus users in a company, then all of them will have access to all files stored in the File Library by any of the other users. Forsta therefore strongly recommends that to simplify navigation and file location, each user creates his/her own folder in the library in which to store their files.

The administrator can synchronize/transfer File Library files for a specific interviewer.

Note: During synchronization, the interviewer is checked to establish whether he/she is in the same company as the survey. If not, the capicommon and pxxx folders (if any) in the company file library are downloaded to the device.

4.7.1. How to Transfer Files to a Specific Interviewer Console

Note: You must have System_File_library_Access permission to transfer files.

1. Log on to Forsta Plus as the administrator.
2. Go to the **Home > File Library** menu command.

   The File Library window opens.

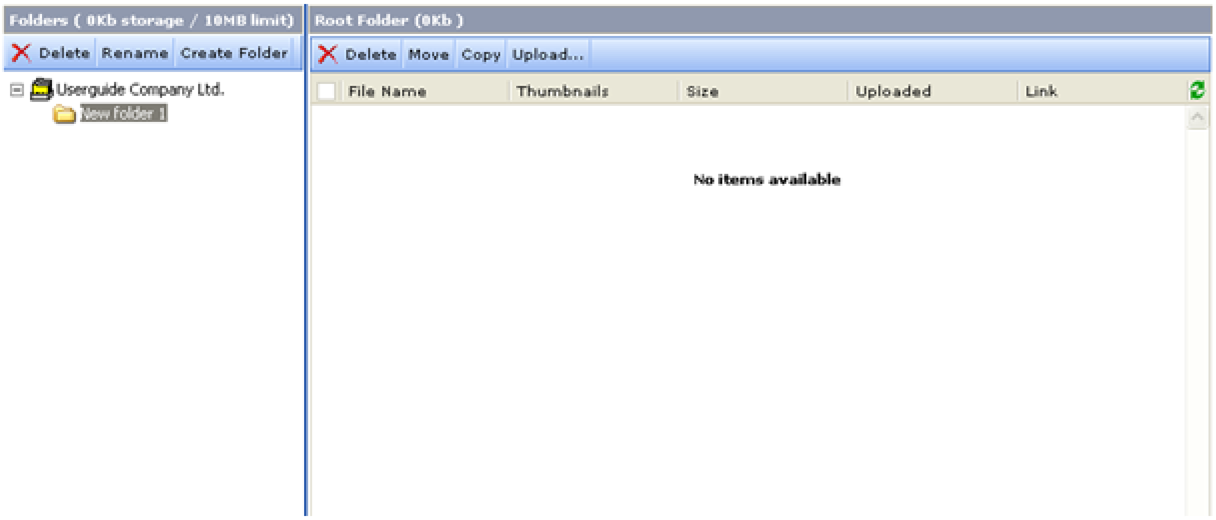

Figure 48 The File Library window

3. If necessary, create a new folder in the File Library for the interviewer, into which the files are to be uploaded.
4. In the Folders column, click **Create Folder**. A new folder is created under the company folder.
5. Name this folder CAPI + the interviewer ID, for example “CAPI_adamapple”.
6. Click on the new folder to select it, and in the Root Folder column, click **Upload**.

   The Upload Files pane opens in the lower part of the screen.

7. Browse to and select the files you wish to upload (note that you can upload up to five files at one time), then click **Upload Files**.

   The Files are copied into the selected folder.

5. Interview and Respondent Life Cycle

The following information is intended to assist CAPI administrators to better manage the interview and respondent life cycle for CAPI projects.

1. **Interview Status**

   Interviews can be Completed, Screened, Error, Canceled, Postponed, or Quotafull

2. **Redoing Interviews**
   - Canceled, Error, Postponed, Screened, and Quotafull interviews can be redone
   - Completed and uploaded interviews can be redone if "Allow respondents to re-enter a completed interview and change their answers" under Web Options is enabled for the survey. However any changes will not be uploaded to the server because (as per item 6 below) completed interviews on the server cannot be overwritten.

3. **Uploading Interviews**
   - Canceled interviews if never previously postponed will not be uploaded (see Cancel Behavior for New/Postponed Interviews on page 43 for more information)
   - Canceled interviews if previously postponed will be uploaded (see Cancel Behavior for New/Postponed Interviews on page 43 for more information)

4. **Reassigning Interviews**
   - The purpose of reassigning interviews is to transfer an interview that has not yet been completed from one interviewer to another interviewer.
   - Completed, Screened, and Quotafull interviews cannot be reassigned. These interviews are considered closed.
   - Error and Incomplete Interviews can be reassigned, but with a warning “Any data that hasn’t been synced won’t be transferred to new user”.
   - Assigned interviews that are canceled can be reassigned (see Cancel Behavior for New/Postponed Interviews on page 43 for more information).
   - New and Postponed interviews can be reassigned. CAPI administrator should be aware of possible unwanted scenarios which could arise from wrong practice. Possible scenarios are:

Correct practice:

- New or Postponed respondent is assigned to User 1.
- User 1 syncs and downloads respondent on Device 1.
- Respondent is reassigned to User 2.
- User 1 syncs and respondents is removed from Device 1.
- User 2 syncs and respondent is downloaded to Device 2, and life cycle continues.

Incorrect practice 1:

- A new or postponed respondent is assigned to User 1.
- User 1 syncs and downloads the respondent on Device 1.
- The respondent is reassigned to User 2.
- User 1 does not sync and the respondent remains on Device 1. However the respondent will be removed from the device with the next sync. Even if the user then completes the assignment or partially completes it and syncs, the server would reject the assignment as it is unassigned from this user.
- User 2 syncs and the respondent is downloaded to Device 2, and life cycle continues.

Incorrect practice 2:

- A New or Postponed respondent is assigned to User 1.
- User 1 syncs and downloads the respondent on Device 1.
- The respondent is reassigned to User 2.
- User 1 does not sync and the respondent remains on Device 1, User 1 makes some changes but does not sync.
- User 2 syncs and the respondent is downloaded to Device 2, User 2 makes some changes and syncs.
- The respondent is reassigned back to User 1.
- Now User 1 syncs but as the record is already on Device 1, it won't be overwritten, so changes made by User 2 won't be downloaded to Device 1. User 1 completes and syncs and overwrites the server record, so any changes made by User 2 are permanently deleted.

5. **Archiving Interviews**
    - o Cancelled, Error, Postponed, Screened, and Quotafull interviews are never archived and removed from the device.
    - o Completed but not uploaded interviews are never archived and removed from the device.
    - o Completed and uploaded interviews are archived and removed from the device with the next sync if "Allow respondents to re-enter a completed interview and change their answers" under Web Options is disabled for the survey.
    - o Completed and uploaded interviews are archived and removed from device after 30 days if "Allow respondents to re-enter a completed interview and change their answers" under Web Options is enabled for the survey.
6. **Overwriting Interviews**
    - o Completed Interviews on Server: Once an interview is completed and uploaded to the server, it will not be overwritten by the app, even when "Allow respondents to re-enter a completed interview and change their answers" under Web Options is enabled for the survey.
    - o Postponed Interviews on Device: Once an interview is postponed in the app, it will not be overwritten by the server, even when server copy of the interview is different from and perhaps newer than app copy of the interview.
7. **Device Local Storage Copy of Postponed Interviews When Unassigned**
    - o When a postponed interview in the app which is already uploaded to the server is unassigned or reassigned and the user syncs, though the interview record disappears from the app it remains on the device in local storage.

If at a later time the same interview record is reassigned back to this same user, the local storage copy of the interview on the device will be used, not the server copy.

This is because as per item 6 above, the server does not overwrite any existing postponed interviews on the device, even when the server copy of the interview is different from and perhaps newer than the app copy of the interview.

- o To overcome the above issue, you can instruct the app via scripting to remove the local storage copy of the postponed interview when it is unassigned.

As is described in the separate Scripting manual, to postpone an interview via scripting you can use the PostponeInterview (“description”) script. To postpone an interview and instruct the app to remove the local storage copy of the postponed interview when unassigned, you can use PostponeInterview (“description”, true).

8. **Shared Devices Between Interviewers**

- o As a copy of a postponed interview remains on the device local storage when unassigned (see Device Local Storage Copy of Postponed Interviews When Unassigned on page 42 for more information) and the server does not overwrite postponed interviews on the device (see Overwriting Interviews on page 42 for more information), if interviewers dealing with the same respondents plan to share devices, they must first sync to upload any complete/postponed respondents and then delete all data (on Android) or uninstall and reinstall (on iOS) before the next interviewer can use the device.

9. **Interviewer using Multiple Devices**

- o If an interviewer logs into multiple devices, the same set of respondents will be downloaded to all the devices. In such cases, a race situation can arise when the interviewer syncs from the different devices. The expectation is that:

- The earliest sync wins for Completed interviews.
- The latest sync wins for Postponed, Screened, and Quotafull interviews.

10. **Cancel Behavior for New/Postponed Interviews**

- o Status: The Postponed interview status changes to Canceled when **Cancel** is selected from the survey menu.

Note: When canceling Complete/QuotaFull/Screened/Error interviews, the status does not change to Canceled. However when canceling New interviews, the status changes to Canceled.

- o Upload: The App continues to upload canceled interviews if they were initially postponed. In this case, while the interview status in the app has changed to Cancel, it will remain Incomplete on the server.

If a new interview (never previously postponed) is canceled, the app will not upload it.

- o Archiving: Canceled interviews (whether initially postponed or not) are archived and removed from the device after 30 days if not touched and unassigned.
- o Cancel Modal: The Cancel dialog box is adjusted to indicate removal after 30 days and to indicate no upload if the interview was not initially postponed.

11. **Syncing**

- o **Manual Sync**: To upload interview results and download new respondents, the interviewer must manually initiate sync by tapping the app's **Sync** button. Manual sync also checks for survey updates and uploads the app event logs.
- o **Background Sync**: A background sync task checks survey updates but does not upload/download respondents and does not upload app event logs. Background sync on Android is performed every 30 minutes. On iOS the background sync depends on the operating system. If iOS thinks the app is still active while in the background, then a background sync would happen within half an hour, otherwise it could take longer. Furthermore, when the interviewer brings the app to the foreground, a sync is initiated for checking survey updates only.
- o **WiFi / Cellular Data**: The app uses WiFi when this is available, or Cellular Data when WiFi is not available, for respondent upload/download, for survey update checks, and for manually sending diagnostics via the app settings page. However, app event logs are uploaded only when a WiFi connection is available.'

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