# UGANDA BUREAU OF STATISTICS

THE REPUBLIC OF UGANDA

# UGANDA NATIONAL PANEL SURVEY

# 2010/11

## Team Leader's

## Manual of Instructions

**UGANDA BUREAU OF STATISTICS**

**P. O. BOX 7186**

**KAMPALA UGANDA**

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# 2 INTRODUCTION

CWEST (Capture With Enhanced Survey Technology) is a brand new survey technology developed by Economic Development Initiatives (EDI) Ltd to capture high quality data. CWEST brings interviewing, data entry, data quality check and data export together in one place. Using Ultra Mobile PCs (UMPCs) and a sophisticated software suite gives users the benefits of instant and accurate data collection.

Of course new technology means new logistical and survey management procedures and new skills for the Team Leaders, whose role is to supervise the work done by interviewers and to crosscheck all the data collected.

As the Team Leader is also the link between the interviewers and the survey headquarters, it is critical that they follow strict guidelines and ensure that their team members do as well. The following manual covers the following key issues:

1. How to keep the equipment charged in the field?
2. How to sample households for survey?
3. How to review electronic data?
4. How to transfer data to headquarters?

This document aims at giving an answer to all Team Leaders' queries concerning his/her CWEST duties.

Note, this manual should be considered as **additional** information to the **UNPS Interviewer Manual** All contents of these manuals are also part of the training materials for the Team Leader and should be studied carefully by any person involved in the survey.

# 3 TYPICAL EQUIPMENT OF SURVEY TEAMS USING CWEST TECHNOLOGY

Typical field equipment of a survey team using CWEST technology includes:

- Manuals containing general guidelines for interviewers and Team Leaders using CWEST technology
- Stationeries
- UMPCs
- Laptop (for Team Leader)
- UMPC Stylus pens
- UMPC bags
- UMPC batteries
- Field bags
- UMPC screen cleaning tissues
- Rain coats/ ponchos large enough to cover the interviewer and bag containing the equipment
- Identification cards
- Extension cables
- Invertors
- Solar panel
- Fluorescent light

- Accumulator batteries
- Solar regulators
- Options depending on the nature and complexity of the survey:
    - Manual specific to the survey
    - Personal Questionnaire Review Booklets
    - GPS – if required and not inherent to the UMPC being used
    - UMPC backup battery or battery pack
    - Anthropometric equipment

You will be required to establish a list of all required equipment for field work. Furthermore, you should document which equipment has been assigned and handed over to which interviewer in your team.

# 4 Overview of CWEST related Team Leader tasks

Team Leaders are often occupied with many important tasks, which can lead to stressful situations due to time constraints, negatively affecting data quality. CWEST has been developed to assist the Team Leader as much as possible in his/her tasks by adding various tools in the Questionnaire with the ultimate purpose of minimizing time spent on each of the Team Leader tasks while improving the quality of the data significantly.

The following table gives an overview of Team Leaders' tasks affected by CWEST, distinguishing between those tasks supported by CWEST technology and those that are not. Note that the table does not include all Team Leader tasks, only those tasks that are somehow affected by using CWEST technology instead of traditional survey methods. For a discussion of the other Team Leader tasks we refer to the manual specific to your survey project.

| Team Leader tasks supported by CWEST technology | Team Leader tasks outside the CWEST technology |
|---|---|
| ➢ Creating and distributing data files to interviewers<br>➢ Merging data collected by interviewers<br>➢ Reviewing data<br>➢ Checking records requiring follow-up<br>➢ Allocating sampled surveys to interviewers<br>➢ Transferring data<br>➢ Creating reports<br>➢ Backing up your data | ➢ Maintaining security<br>➢ Updating software if required<br>➢ Equipment hand-over procedure<br>➢ Preparing car for field work<br>➢ Battery charging procedure<br>➢ Feedback duties |

The remainder of this document discusses these tasks.

# 5 TEAM LEADER TASKS OUTSIDE CWEST TECHNOLOGY

## *5.1 MAINTAINING SECURITY*

Just as for traditional survey projects, but even more so for CWEST survey work, the Team Leader needs to maintain security of his/her team members at all times. New technology is attractive, not only for survey staff and data users, but to any person that sees value in UMPC equipment, including people with bad intentions... To date there have not been any security problems in any of our CWEST projects mainly due to the field staff accurately following our security guidelines. We recommend you to do the same.

Security guidelines:

- Select accommodation where you can safely store your equipment. Moreover, all your team members should preferably stay in the SAME place and share rooms, such that several eyes watch the equipment. Try to stay for longer periods in the same hotel such that you are respected by the hotel managers whom you can then ask to keep an eye on your rooms while you are away for field work.
- NEVER leave the equipment unattended. Establish a shift system such that at least one person of your team watches the equipment at all times (even during diner time). Alternatively you can keep the equipment individually (so that the values are spread around), but someone should always remain behind to watch around.
- Avoid travelling in the dark
- Pack the equipment in covers that do not give away their contents, i.e. use neutral covers. E.g. for UMPC bags use neutral (though protected) bags that from the outside look as if they contain stationeries. E.g. for the solar panel, develop a wooden box to be put on the roof of your car, which from the outside look as if they contain vegetables. Etc.
- Do not take UMPCs/laptops out of their bags in public. If you are working on a UMPC/laptop while back at your base camp you should work in your room.
- Watching of equipments while at their camps, some are following the exact procedure explained above while others have altered it a bit. The alternation is that instead of all equipments being kept together they keep them individually and since they always stay in the same house at list every time there is a person remaining behind watching around. All teams maintain the practise of staying in the same place (this helps a lot). Specifically for team members are recommended to share rooms with a minimum of 2 per room. This also adds levels of security.

## *5.2 UPDATING SOFTWARE IF REQUIRED*

One of the great advantages of CWEST is that the CWESTionnaires can easily be updated whilst in the field. Unlike traditional paper and pen survey work, CWEST does not require printing out of hundreds of new paper questionnaires in case the questionnaire gets updated. Instead, CWEST only requires a safe flash drive, a good internet connection and a responsible Team Leader.

The Team Leader is in charge of making sure that all UMPCs are installed with the latest version of the survey software. The moment an update of the software is available the Team Leader will be informed (usually by email) and will collect the new installation file by downloading it from the internet. Having collected the update, the Team Leader will install the update as soon as possible on EACH UMPC, typically using a flash drive. It may be that the update is copied to several flash drives, one for each team, if there are many teams, to speed up the process. This procedure is usually carried out *before* the UMPC gets handed over to the interviewer. Moreover, the moment the

software has been updated, the Team Leader is in charge of informing his/her team in detail about the changes made to the questionnaire.

### *5.3 EQUIPMENT HAND-OVER PROCEDURE*

The Team Leader is in charge of making sure all equipments are properly maintained by the interviewers in his/her team. In order to do so you need to receive and check all the equipments assigned to the interviewers every evening. Do not take for granted that all equipment from an interviewer is undamaged without crosschecking.

It is important that you organize yourself well in storing the equipment after it has been handed over to you. Mind you for keeping equipment misplaced.

We refer to the CWEST interviewer's manual for more details about the equipment hand-over procedure.

### *5.4 PREPARING CAR FOR FIELD WORK*

CWEST implies new challenges to the field car driver as well. This person needs to make sure that all equipment is safely stored in the car. The solar panel for instance is very delicate equipment, it should not be loaded with heavy materials on top otherwise you would cause serious damage. Moreover, in most of our CWEST projects, the car driver is responsible of charging the accumulators (usually by using solar panel) during the day, allowing the Team Leader and interviewers to proceed with their field work. Hence, the Team Leader needs to make sure that the driver knows how to handle the power systems and all the procedures for charging accumulators. Cf. section 5.5 for more details about the battery charging procedure.

### *5.5 BATTERY / POWER PACK CHARGING PROCEDURE*

A Team Leader is required to make sure that the accumulators are charged during the day and that the batteries of the UMPCs are fully charged each night before she/he goes to bed so that all equipment is 100% ready for use the next day. There exist several different power systems by which a Team Leader can charge the batteries of the UMPCs. The most popularly known power system is main electricity. However, electricity is not always available in the field.

The recommended alternative to mains electricity is generator, in which UMPCs can be charged in the same way as with Mains electricity. When using a generator you should:

1. Make sure that the generator is strong enough to power all UMPCs and other equipment
2. Make sure that you have read the manual that came with your generator and know how to properly:
    a. Turn the generator on
    b. Turn the generator off
    c. Add fuel
    d. Add Oil
    e. Service the generator when needed (see manual for timings)
3. Use a voltage stabilizer between the generator and the UMPCs to ensure that the voltage is stable. High voltages can damage the UMPC batteries.

Another power option commonly used in CWEST projects is natural solar energy. Yet another option is using generators. You will use the power systems interchangeably according to accessibility. If you are working in a cluster where there is electricity you will be able to use the power for charging your

UMPCs but this does not exempt you from charging your accumulators using other power systems such as solar power. Because of regular power cuts in many places, you should always make sure your accumulators are charged during the day. Since most inverters can convert DC to AC and vice verse you can use electricity power (if available) to charge your accumulators at the same time that you are charging your UMPCs.

Previous CWEST projects have mainly been using solar power as alternative to electricity. Solar power can be used to charge accumulating batteries (accumulators) which can later be used to charge UMPCs, to provide light or provide energy for other instruments which are to be used in the field area. Charging the solar panel should preferably be done on the car board so as to optimize the absorption of sunlight and to ensure safety of the materials used in the solar panel connection. One more advantage of this is that you can continue charging even when the car is moving.

In case you do not receive enough solar radiations during the day and the centre you are working in does not have electricity, you are advised to ask the car driver to charge your accumulators using the car batteries while driving around.

The solar panel is usually connected with an electrical cable with two wires, a red one and a black one. The red wire needs to be connected to a positive terminal of the regulator, while the black one needs to be connected to the negative terminal. The wires from the accumulator are similar, and they follow similar procedures. There are clear marks on the regulator indicating which connection goes to what pole.

The following are the points to note when laying out the solar power connection:

- Lay out the solar panel in a way that it will face the sunlight.
- Connect the wire from the solar panel to the regulator (solar power controller).
    - The red wire should be connected to the positive pole and the black wire should be connected to the negative pole.
- Connect the wire from the regulator to the batteries.
    - The red wire should be connected to the positive pole and the black wire should be connected to the negative pole.
- When the solar power is connected, the blue (charging) and orange (power out) lights on the regulator will switch on.
- When the battery is charging, the battery light signal will be off.
- Observe the red and green light on the inverter; A red light implies that the internal AC is cut off and the power is coming essentially from the battery, while the green light implies that the battery DC is cut off and that you are using AC source
- **Switch off all the sockets when connecting extensions and wires to a source of electric power.** You should as well maintain loose connections as this may cause damage to your electrical appliances. Once you are satisfied with your arrangements, switch on the socket to allow the charging process to commence

### *5.6 FEEDBACK DUTIES*

It is the Team leaders role to give feedback to HQ on any issues with the questionnaire and software so that they may be corrected quickly. This may be feedback of any kind, about the survey software, about the UMPC, about its battery use, its battery charging system, its bag use, etc.

Very important feedback, for instance, is feedback concerning the automatic validation check procedure. In case you find some errors yourself that were not detected by the automatic validation check procedure, **please notify this to your head quarters** as soon as possible. It is very important that you give this feedback, since it enables us to make the collected data more reliable for future research purposes.

The interviewers are asked to pass on their feedback to the Team Leader during the evening feedback discussion sessions. It is the task of the Team Leader in turn to pass on this feedback to the headquarters.

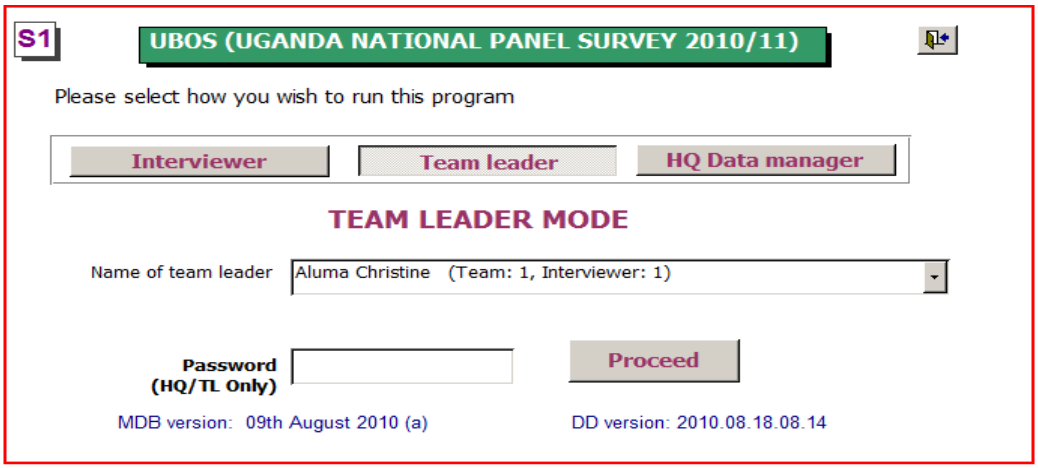
## 6 TEAM LEADER TASKS SUPPORTED BY CWEST TECHNOLOGY

As mentioned in Section 4, CWEST software contains various tools to assist the Team Leader in his/her field duties in order to minimize time spent on each Team Leader task while improving the quality of the data significantly.

This section discusses all Team Leader tools currently available in the CWEST software. Section 6.1 takes off by guiding you to the location of the Team Leader tools in the typical CWEST survey programs.

### *6.1 FINDING YOUR WAY TO THE CWEST TEAM LEADER TOOLS*

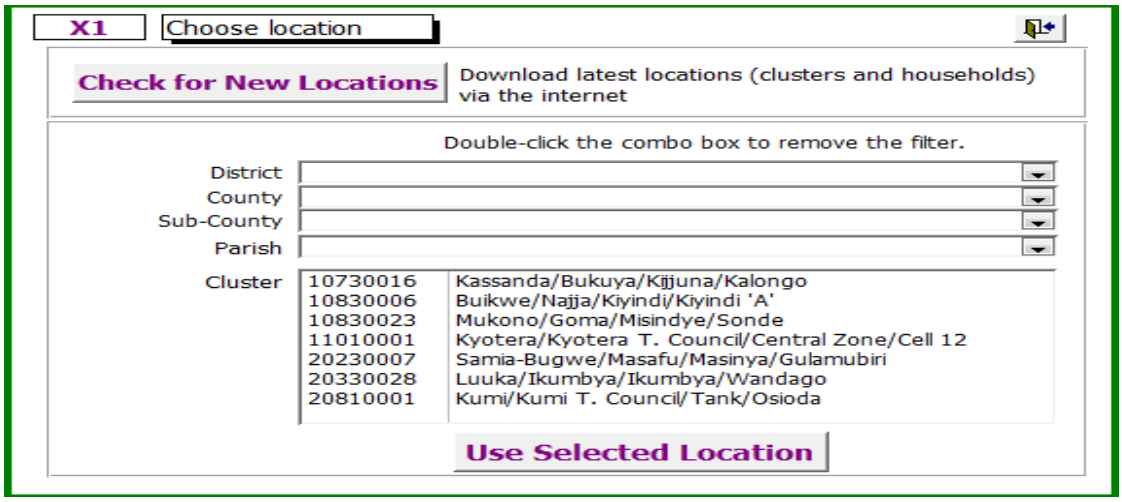
The software tools to be used by the Team Leader in order to carry out his/her tasks are usually grouped together on one form, i.e. form **X**, to which access is usually restricted to the Team Leader. In order to find your way to this form, please follow the following instructions. When opening up the survey program, form S1 opens up. Details of this form are discussed in the interviewer's manual.




1. First Click on the Team leader button.
2. Then Select your name from the drop down list
3. Enter your password
4. Then click on the Proceed button.

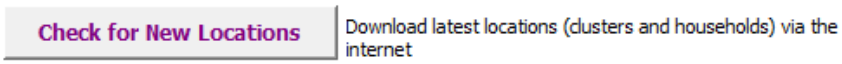
### *6.2 FORM X1 – CHOOSE LOCATION*

The first form to open within the Team Leader functions will be the Choose Location form.

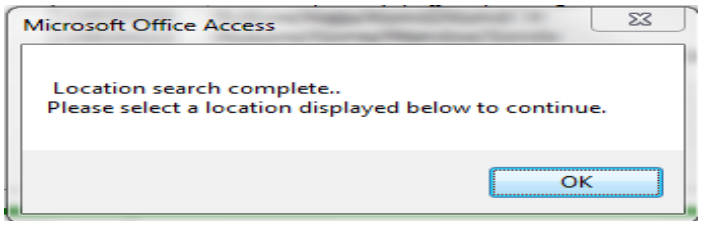



**On this form you can:**

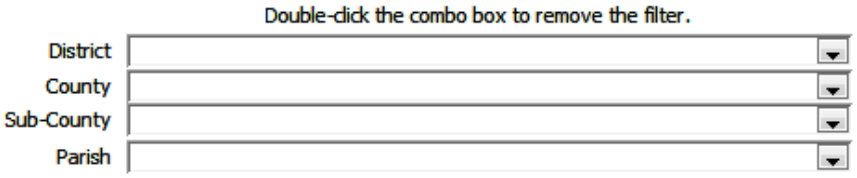
1. Download the latest locations (clusters and households) via the interview from the UBoS FTP server. To do this just click on the **Check for new locations** button.




When you do this a yellow screen will appear showing the database is 'working' when completed the following box will appear and the list of clusters will be updated.

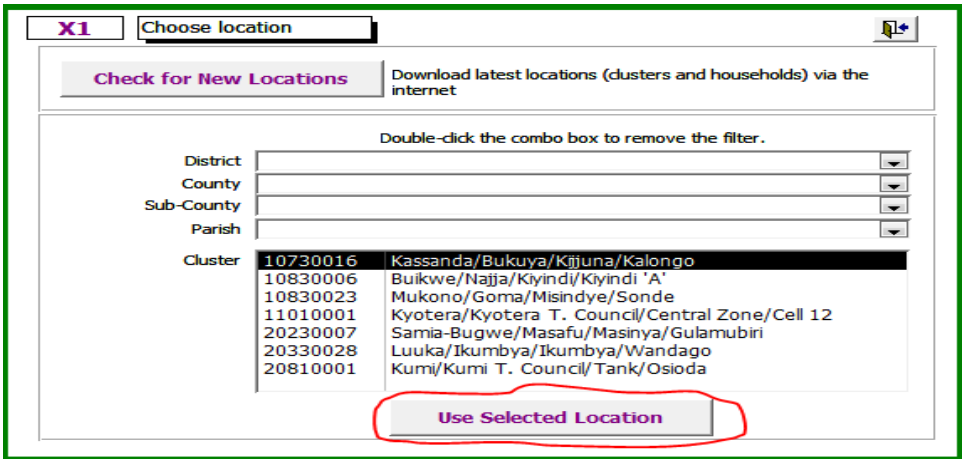



2. Filter the list of clusters by District, County, Sub-County and Parish by selecting the names from the four drop down boxes. For example if you select Kassanda in the district dropdown box then only clusters in the Kassanda District will appear in the list of clusters.



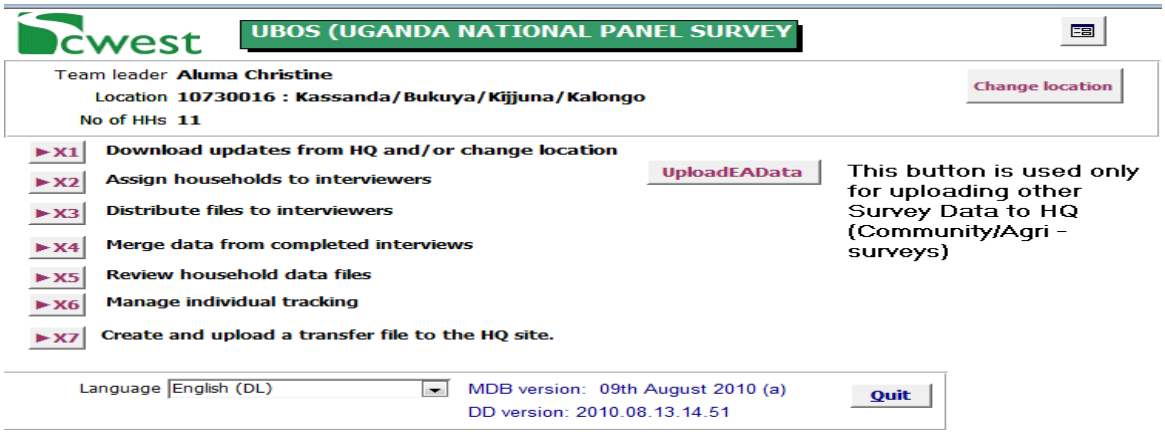

To remove a filter just double click on the appropriate combo box.

3. Select the cluster (location) that you are interested in by clicking on the cluster name in the cluster list and then click on the 'use selected location'




### 6.3 *Form X – Team Leader Main Screen*

Having selected the location you are interested in, the main X form will open, which consists of variety of Team Leader Functions. The tasks on form X are sorted in the sequence in which they need to be carried out. The following sections will discuss these software tools in much more detail.




Before we discuss the other sub-tabs, let is first discuss the general functions on this screen:

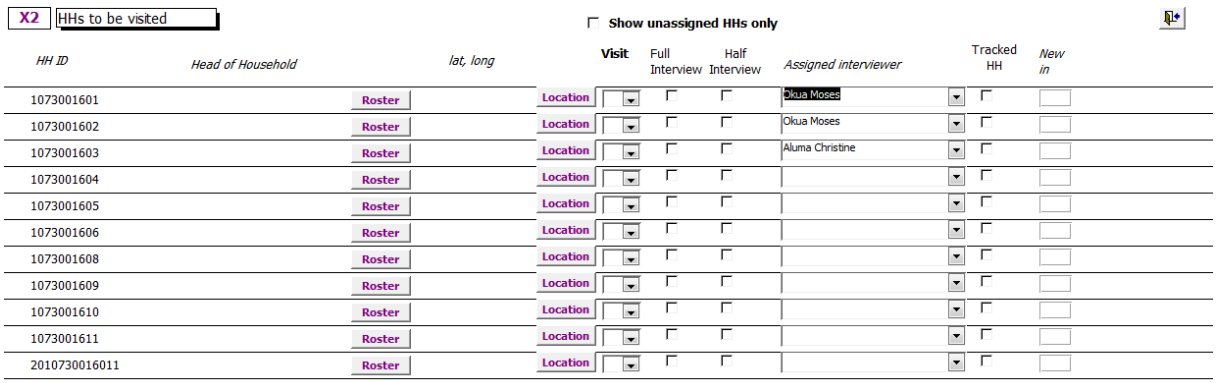
1. If you want to change the location/cluster you are reviewing click on either the Change location button or the ▶X1 Download updates from HQ and/or change location and you will be returned to Form X1 – as discussed in the previous section.
2. At the bottom of the screen you will see:
   a. the questionnaire language in this Survey only English is used so you don't need to change anything
   b. The current version of the database that you are using, please make sure you are always using the most recent version.
   c. The Quit button which you may use to close CWEST when you are finished.

In the following sections we will discuss the other options on this form.

### 6.3.1 *Form X2 – Assign Households to Interviewers*

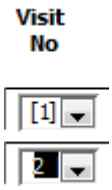
As the name suggests this form is to assign households to interviewers.

The form contains a list of all households for the selected cluster and for each household, detailing the Household ID and Head of Household. For each household there is also a Roster and Location button, these functions are described in the main survey manual. But in short, the Roster Button opens a screen showing the list of Household Members and the Location button opens a form showing the GPS and other location information known for each household.




The Team Leader should then assign each household to an interviewer by:

1. Select the Visit Number (Visit No) – i.e. is this the first or second visit? – from the drop down box, e.g.




2. Identify whether this is a full or half interview by ticking in the appropriate column

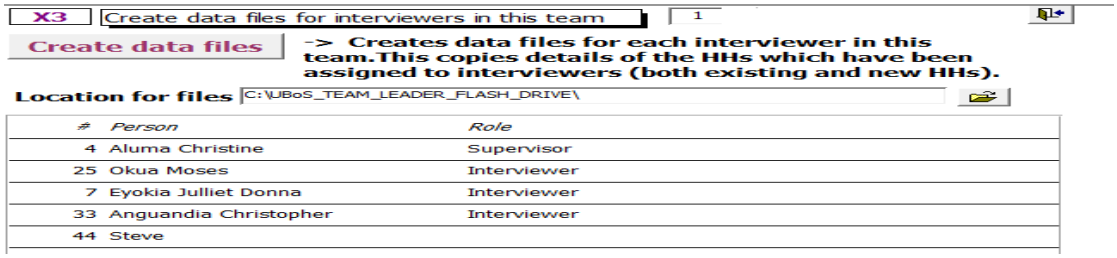
3. Select the Interviewers Name from the assigned interviewer column.

4. To simplify this task you can click in the Show unassigned HHs only tick box at the top of the screen which will then hide all households that have already been assigned.

**Note the final column 'New in Wave' will be populated automatically by CWEST**

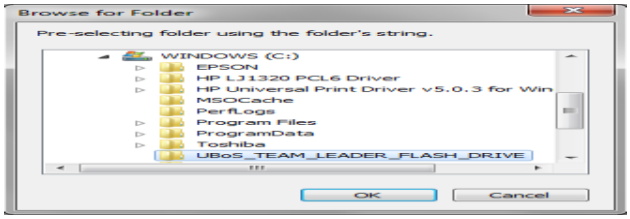
### 6.3.2 *Form X3 – Distribute Files to Interviewers*

Clicking the ▶X3 Distribute files to interviewers button brings you to form X3 where you can create and distribute data files to interviewers in your team. The creation of the data files to be distributed to the interviewers is done on the Team Leader's computer, using the form shown below:




The form provides a list of your team members (including yourself) and will enable you to create data files to transfer to each of their UMPCs. To do this, follow these instructions:

1. First make sure that you are using the latest data file from HQ and that you have assigned all households to the interviewers.
2. Enter the name of the folder that you wish to create the data files in. For simplicity it is recommended that you create and use a folder named **C:\UBoS_TEAM_LEADER_FLASH_DRIVE**
   - Note it is recommended that the data files are created on your PC and then copied to a flash drive
   - To locate the folder you wish to use click on and locate the folder within browser:




3. Finally, click on the Create data files button and the system will create a folders for each interviewer within the folder you have chosen containing the data files to be copied to the interviewers UMPC.
4. Within the main folder **[C:\UBoS_TEAM_LEADER_FLASH_DRIVE\]** you will find different interviewer specific sub-folders named after the interviewers in your team, each sub-folder containing the interviewer specific data files each containing the pre-entered information. Each data files is unique: The name of the data files end with cluster ID + interviewer ID. For example if you have:
   - An interviewer with the id of 1234 and name of Fred
   - The 'cluster' (e.g. village, island, university, suburb …) you currently want to interview has the id of ABCD

   The 'Create data files' screen indicates that the data files are in the directory **C:\UBoS_TEAM_LEADER_FLASH_DRIVE**. Then when you click on Create data files you will find the data file for this interviewer for this cluster in, C:\YOUR_SURVEY\InterviewerDataFiles\Fred\ABCD_1234.

   You can then copy these files onto your flash drive and distribute them to the UMPCs of the respective interviewers. IT IS IMPORTANT THAT YOU INSTALL THE RIGHT DATAFILE IN THE RIGHT UMPC, I.E. IN THE UMPC OF THE INTERVIEWER AFTER WHOM THE DATAFILE IS NAMED. Moreover, you need to make sure you install the file in the folder called "Datafiles" on the interviewer's UMPC.

Once you have installed these specific data files on all UMPC's your team is ready to start survey work.

### *6.3.3 Form X4 –Merge Data From Completed Interviews*

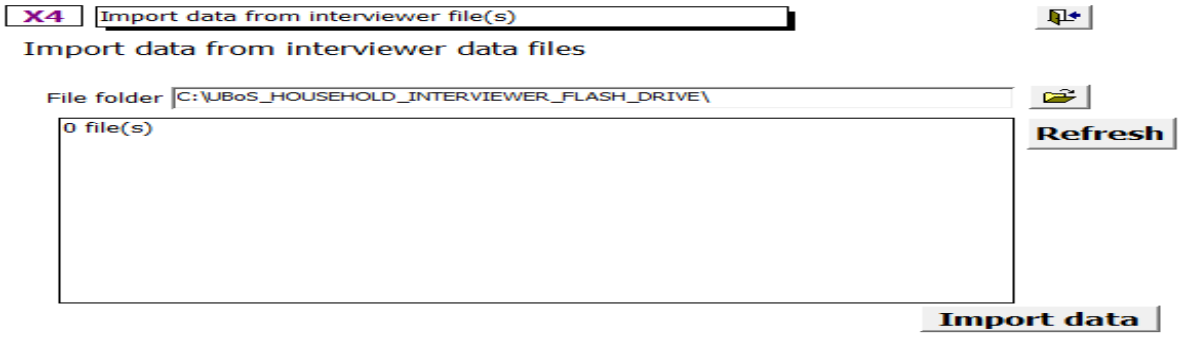
▶X4 Merge data from completed interviews

Clicking this button brings you to form X4 where you can import and merge files from interviewers.

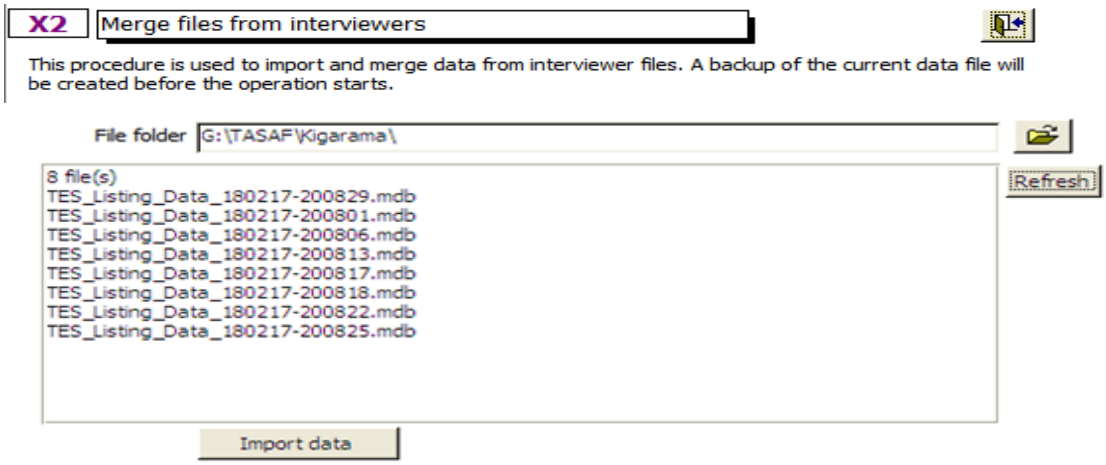
At the end of a survey day, when all your team members are back together with you in base camp, you need to merge all the data that your different team members have collected during the day into one merged data file on your PC. You will then have the whole day's data in one file, which will simplify the data review process (cf. section **Error! Reference source not found.**).

To start this process, copy the interviewer specific data files back off the UMPCs onto your flash drive. These have the same name as the ones you copied onto the UMPCs in the process described in section **Error! Reference source not found.**. In the example used previously, from Fred's UMPC you will copy the file ABCD_1234 from the directory 'Datafiles' on his UMPC ('ABCD' being the i.d. of the cluster and '1234' being the unique interviewer's ID for Fred).

Having collected all the day's data files from the team onto your flash drive, insert it into your PC, open the CWEST programme, connect to the 'cluster' surveyed today (island, village etc.) under your own name and move your way to form X4, shown below:




Use the button, browse to the location on your flash drive where you have copied the day's data files from your interviewers. They will then be listed on a screen similar to that below:




Double check that you have all the files you expect; if you have missed one and removed the flash drive to add another file then you will need to click the Refresh button to list the files again

When you are sure that you have all data files, click the Import data button. All the NEW interviews your team members created/changed during the day will be copied into the merged data file of the cluster on your PC. The screen will inform you of the number of new records that are imported.

**IMPORTANT:** Only interviews that are NOT YET present in your merged data file will get transferred. In case you asked an interviewer to change a certain interview on his UMPC, you need to make sure you first DELETE it in your merged data file; otherwise it will NOT get imported into your merged data file. This is to prevent duplication if you accidentally re-import old files.

Your merged data file will be the FINAL data that will eventually get transferred to the HQ. Hence, your ultimate goal must be to have a CLEAN merged data file. If an interview is not yet satisfactorily completed you can:

- Make the necessary changes in the merged data file yourself; or,

- Delete the record in the merged data file, ask the interviewer to make the changes in his/her UMPC and important the record again once the necessary changes have been made

We will look at how to review the merged data below in the next section.

### *6.3.4 Form X5 – Review Household data File*

Clicking on the ▶X5 Review household data files button leads you to form X5 where you can review merged data from interviewers.

Before transferring data to the head quarters, you will have to review it thoroughly. CWEST software assists you significantly in this task. The information you are presented with on form X5 shall be explicit to your survey and selected to allow you to quickly check the validity of the interview. An example of form X5 from a specific survey is given below:

X5 HHs with interview data

| HH ID | Head of Household | | Date of Last Visit | Interviewer | Last visit outcome | View interview data | OK Interviewer | OK Team leader |
|---|---|---|---|---|---|---|---|---|
| 1073001601 | | Roster | No data yet | | | HH | ☑ | ☐ |
| 1073001602 | | Roster | No data yet | | | HH | ☐ | ☐ |
| 1073001603 | | Roster | 09/07/2010 16:45:02 | Aluma Christine | Commenced Interview | HH | ☑ | ☐ |
| 1073001604 | | Roster | No data yet | | | HH | ☐ | ☐ |
| 1073001605 | | Roster | No data yet | | | HH | ☐ | ☐ |
| 1073001606 | | Roster | No data yet | | | HH | ☐ | ☐ |
| 1073001608 | | Roster | No data yet | | | HH | ☐ | ☐ |
| 1073001609 | | Roster | No data yet | | | HH | ☐ | ☐ |
| 1073001610 | | Roster | No data yet | | | HH | ☐ | ☐ |
| 1073001611 | | Roster | No data yet | | | HH | ☐ | ☐ |
| 2010730016011 | | Roster | No data yet | | | HH | ☐ | ☐ |

The screen contains a list of all the household data uploaded with HH ID, name of Household Head, date of last visit, name of interviewer and the outcome of the visit.

You should now:

1. For the interviews that have been completed, confirm that the interviewer is satisfied with the data and if so, tick the OK Interviewer ☑
2. Then click on the HH button for each completed interview, which will open the interview screen for that household. You should then:

    a. Go to the last tab (Tab 9) and click on the COMPLETE validation check button to run a pre-defined validity check on all the data and report any problems to you.

    b. Besides carrying out the automatic validation checks, it is advisable to also pick out at random several records that you check MANUALLY, without using the automatic validation check.

    c. In the rare case that a certain record needs to be re-visited or corrected by an interviewer (instead of by you), you need to DELETE the record from X3 by ticking the

button (remember that records do not get imported if they already exist in the merged datafile, that is why you have to delete it). Make a comment about this record in the Personal Review Booklet of the interviewer if they are being used for your survey.

3. When you are happy with the HH data tick in the OK Team leader tick box and then move on to the next HH Interview to be checked.

Even if you correct an error yourself, it is always useful to feed this back to the interviewer(s) to avoid the mistake to happening again.

### *6.3.5 Form X6 – Manage Individual Tracking*

Form X6, enables the Team Leader to manage individuals from 'tracked' households. Remember that it is Headquarters that decide which households are to be tracked. If a person from a 'tracked' household has moved within your enumeration area, then the TL will use this form to create a new household for the mover. If the member has moved to another area, then he/she will assigned to a new household by HQ.

By click on the ►X6 Manage individual tracking button, form X6, as below:

X6 Status of individuals

*Click on blue headings to filter data*

46 record(s)

Clear all filters

Create new HHs for TRACKED moved persons not already re-assigned

| HHID | PID | Name | Interview status | Dead | Tracked Mover | Location | Another area | Assigned interviewer |
|---|---|---|---|---|---|---|---|---|
| 1073001601 | 10730016011 | Yawe Fred | | ☐ | ☑ | | ☐ | Okua Moses |
| 1073001601 | 1073001601P2 | Test | | ☐ | ☑ | | ☑ | Okua Moses |
| 1073001602 | 10730016021 | OPIO PETER | | ☐ | ☐ | | ☐ | Okua Moses |
| 1073001603 | 10730016031 | Namugga Sinai | | ☐ | ☐ | | ☐ | Aluma Christine |

As with the previous forms, each household is detailed with the HH ID, the Person ID and name for each Household member, as well as the status of the interview for that household (e.g. commenced, completed, refused etc.

For TRACKED HOUSEHOLDS only, if during the interview:

1. It is established that the member has either died, then this will be automatically indicated by a ☑ in the Dead column.

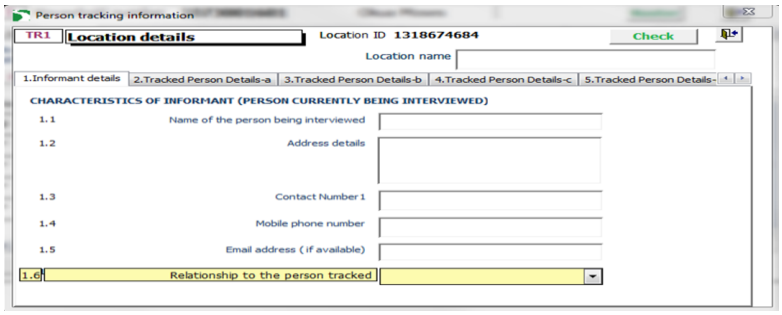
2. If the person has moved this will be shown by a ☑ in the tracked mover column and the name of persons new location will be noted in location column.

If the tracked mover column is clicked, the Team Leader should:

1. Click on the ... button to open the person tracking information form containing the tracking information that the interviewer has collected. If the person is not a tracked mover this form will appear blank, e.g.

2. For Tracked Movers the Team Leader should:

   a. Carefully review all the tracking data collected by the interviewer. If necessary follow up with the interviewer for clarification and if additional data is needed you may wish to send the interviewer back to the household or to other sources of information to ask additional questions.




b. On Tab 8, enter whether you believe the tracking information is adequate.

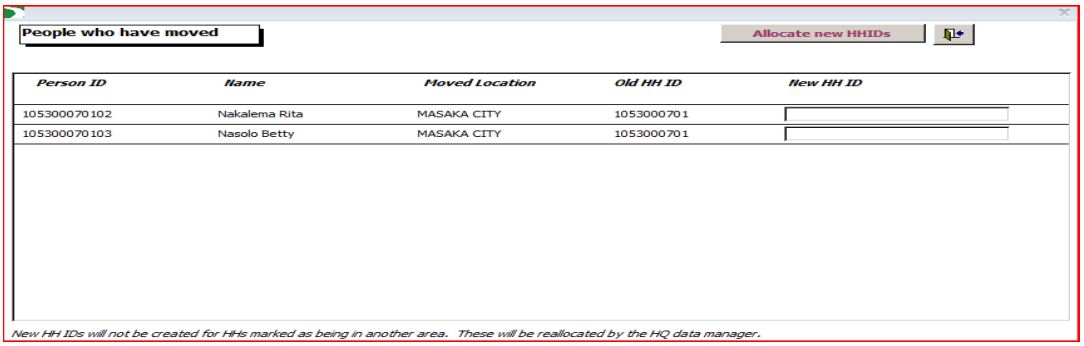
c. Identify from the tracking information if the mover has stayed within the Enumeration Area and can be reassigned to one of your team or if they have moved to another area and therefore need to be forwarded to HQ for reassignment.

d. If the person has moved to another area (i.e. cluster) then tick the

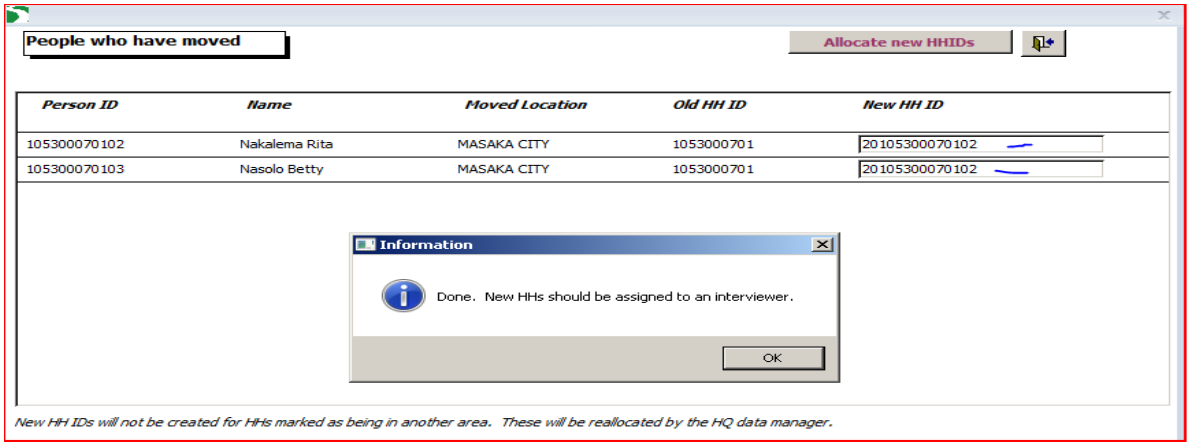
button.

3. Review all households before moving on to the next step.

4. When you have completed your review of the tracking information, you should then click on the **Create new HHs for TRACKED moved persons not already re-assigned** button. Tracked household members who have not yet been assigned a new HH ID and who have not moved to another area will appear (as below). The form that opens will show the Person ID, Name, Moved location and old HH ID for each tracked member.



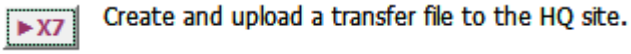

5. Now click on the **Allocate new HHIDs** button and CWEST will generate new Household IDs for the members who have moved within the area of the current cluster. If the person has moved to a new area, then these movers will be assigned new HH Ids by the Data Manager at UBoS HQ and will not appear on this form.




6. Finally Click Ok and return to the main menu.

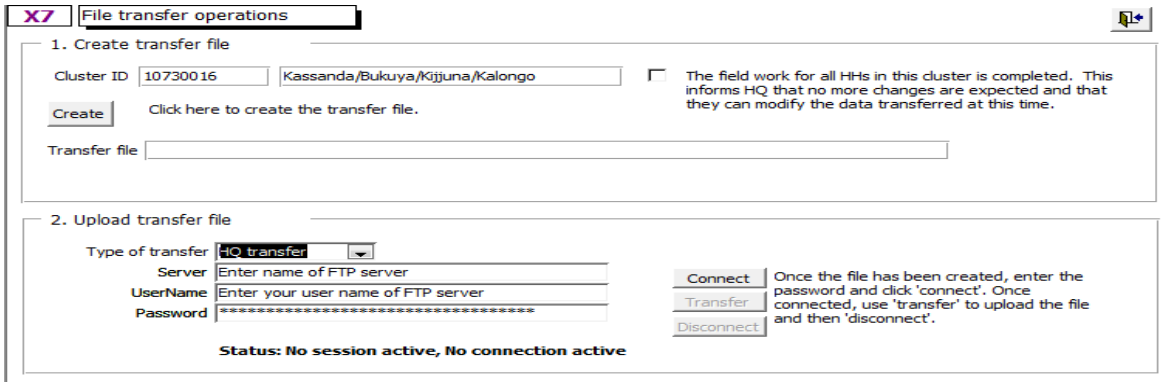
7. You can now go to Form X2 to assign these new households to your team.

### *6.3.6 Form X7 – Create and Upload a Transfer File to HQ Site*

By clicking on the 

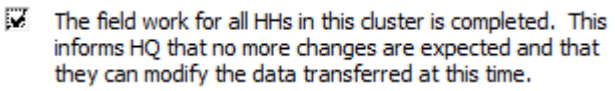
button you will open Form X7 which will allow you to either Back Up your data or transfer the data to HQ. To send the merged and reviewed data to headquarters, it is usual to use an 'FTP site'. This is a directory on the internet that can be accessed by you and headquarters.

Each evening or at least each time the Team Leader has access to internet, he/she needs to transfer new/edited data to HQ. Each time there are new or updated data records, you need to transfer them on ftp server. EVEN IF YOU HAVE NOT REVIEWED THE DATA, you need to transfer ALL records, because it also serves as a daily **backup**.




First you should,

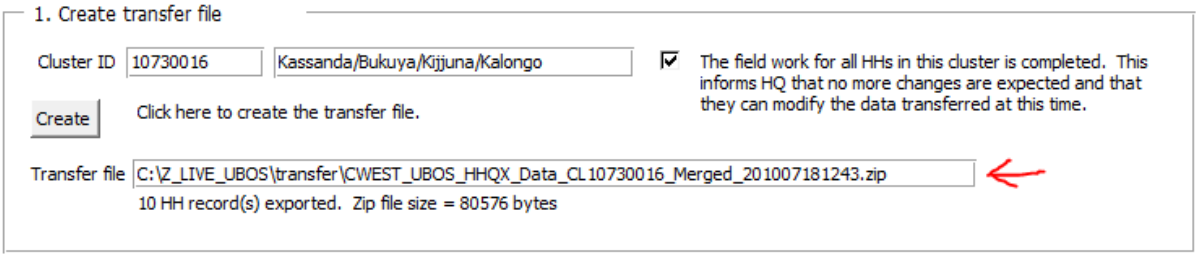
1. Ensure that the correct cluster ID and Cluster name is shown in section 1.

2. Determine whether the field work for the cluster is FULLY completed, if this is the case then click in the 

tick box.

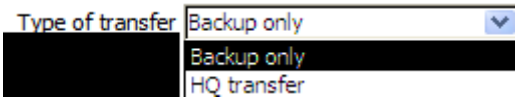
3. You may then create a transfer file by clicking on the

button. The location of the transfer file will be shown on the screen, e.g.




4. You are now ready to upload your data to the UBOS FTP site.

Note that: Backup transfers need to be done EACH EVENING of a survey data. Even if you have not yet reviewed the data because of time constraint, you need to do so, to avoid losing data in case of technical problems. As long as you select 'backup data', you will have the live version of the data and the HQ will not make any changes to it.



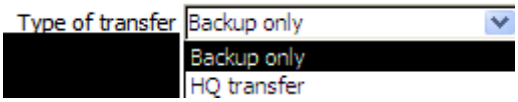

HQ transfers are transfers of FINAL data that has been reviewed by you and of which you are 100 % satisfied. Note that the moment you have transferred data to the HQ, the data is considered FINAL, and you should NOT make any further changes to it, because from that moment onwards the HQ will have the live version.

To do this:

a. Next make sure that your computer is connected to the internet. In the field this is usually by having a USB modem or phone connected to your PC. Open a web browser (e.g. Internet Explorer) to check that the link is working.

b.

c. Select the type of transfer




d. Ensure that the Server name and your name is correct. The 'Server', 'UserName' and 'Default folder' will be pre-filled with information specific to this survey.

e. Enter your username and password

f. Then click the Connect button

g. Once connected, click on the transfer button

h. Once the transfer is complete, click on the disconnect button

The information on the bottom of the screen will tell you when there is a connection and when transferring is taking place and completed. In the example screenshot above you have the message

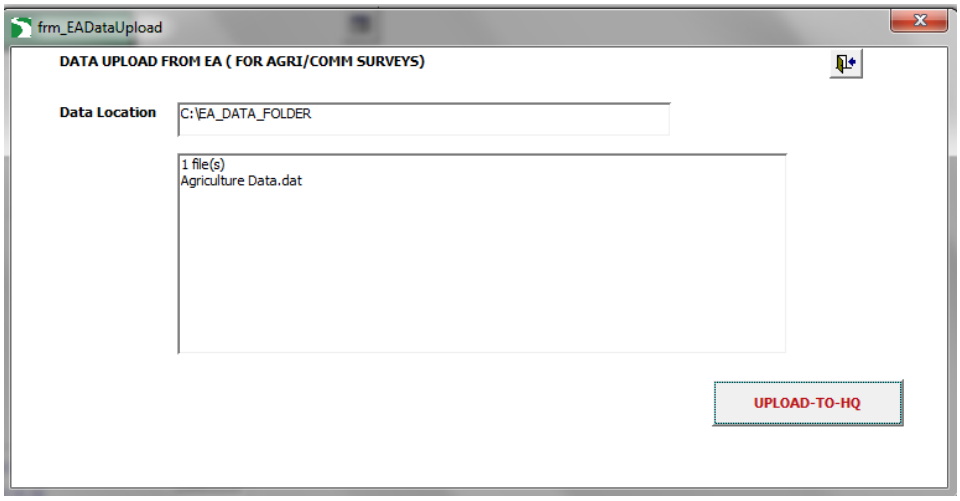
'Status: No session active, no connection active', this is because you have not yet entered the password and clicked 'Connect'.

### *6.3.7 UPLOAD EA DATA*

The upload EA Data button allows the Team Leader to transfer the data from the separate Community and Agriculture data processing system to HQ.

To do this:

1. Export the data from the Community and Agriculture data processing system in .dat format and save to the C:\EA_DATA_FOLDER on your computer.
2. Click on the UploadEAData button, this will open the frm_uploadEAData form – shown below. The form shows all files in the .dat format in this folder.




3. Check that your data file is present then click the UPLOAD-TO-HQ button and CWEST will transfer this data to UBOS HQ.