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Introduction to WebTrak

WebTrak is an on-line sample supervision tool. It is used to monitor the status of sample lines in the field. It gives supervisors the information that interviewers have access to in SurveyTrak, plus some special fields just for supervisors. Using WebTrak, you can monitor sample by using searches you design. More specifically, you can monitor call attempts, call notes, rates, send/receive dates, and result codes, just to mention a few.

This manual will familiarize you with WebTrak so you can use it to its fullest capacity. Although the manual will mention some common tasks that can be done with WebTrak, it does not attempt to include an exhaustive list. As you work with WebTrak, you will discover how you can best use it to help you with your work. Other team leaders can be a great resource to help you learn techniques and tricks in WebTrak.

Logging In To WebTrak

Once you are connected to the Internet via cable modem, iPass, etc., you can access WebTrak either by clicking on the WebTrak icon on your desktop or by clicking on the Internet Explorer icon. The WebTrak website is found at https://webtrak.isr.umich.edu/webtrak/dsp_login.cfm.

Enter your username and password. These are the same as your Windows log-in username and password. If you don't have this information, or you have forgotten it, please contact the Interviewer Help Desk.

Once you've entered your information, press <Enter> or single left click the **LOG-IN** button. Now you are in WebTrak.

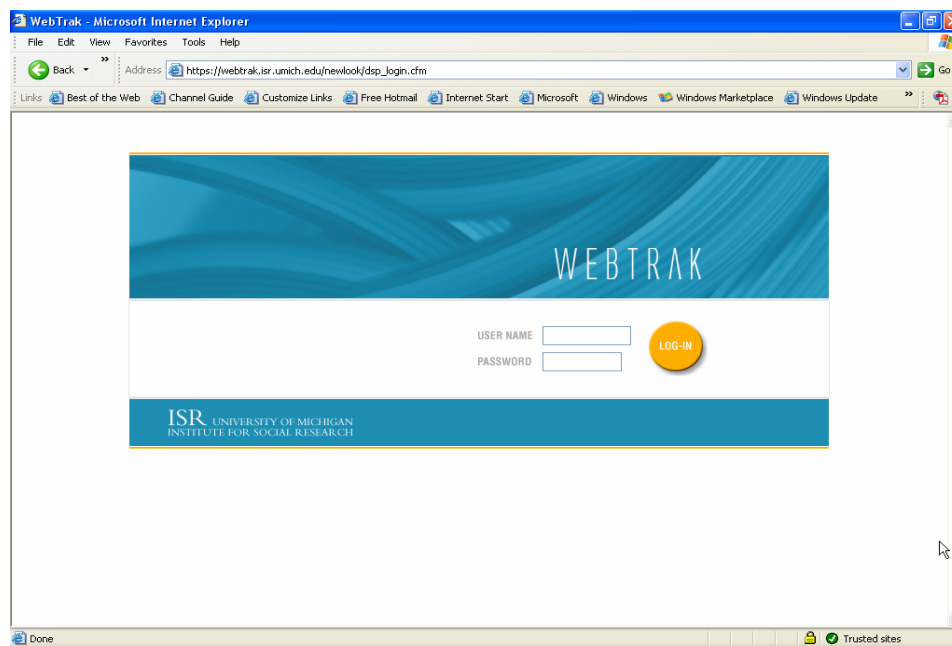


Fig. 1 Log-In Page

Select Project

Once logged in to WebTrak, you are automatically taken to the Select Project page. The highlighted button in the upper right corner identifies the page you are on.

The Select Project page lists the available studies/projects for your username. Study names are listed on the left side of the box and project names to the right. When choosing the project to view, be aware that some studies have more than one option.

Click the radio button next to the project you wish to select, and you are taken to the Current Project page for the selected project.

If at any point you wish to log-out, click the gold **LOG-OUT** button in the upper left corner.

The screenshot shows the WebTrak interface. At the top left is the 'WEBTRAK' logo and a gold 'LOG-OUT' button. To the right are three navigation tabs: '01. Select Project' (highlighted), '02. Current Project', and '03. Search Results'. Below the header, the page title is 'Select Project' with a sub-header 'Select Project'. The main content consists of two side-by-side tables. Each table has 'Study Name' and 'Project Name' columns. The left table lists studies like 'Casey', 'HRS 2004 Main', 'HRS 2004 Screener', 'HRS 2006 Pretest', 'HRS 2006 Production', 'HRS PDS 2005', and 'MTF 2006 Base Year'. The right table lists studies like 'MTF NR 2006', 'PSED', 'PSID 2005', 'PSID 2007', 'SCA', 'UMDES', and 'WebTrak Demo'. Each project name in both tables is preceded by a radio button. At the bottom of the page is the 'ISR UNIVERSITY OF MICHIGAN INSTITUTE FOR SOCIAL RESEARCH' logo.

Fig. 2 Select Project Page

Timing Out of WebTrak

Because of the confidential nature of the information that is displayed in WebTrak, the designers included a special security precaution. If you do not interact with the WebTrak display for 30 minutes, it will “time-out.” This means that the next time you go to click something on the page, you will have to log-in again. The amount of time you have left before you time out is displayed in the browser status bar in the lower left hand corner of your screen.

Current Project Page

Once you've chosen a project, you will reach the Current Project page. This page is the starting point for your work in WebTrak.

Each Project Page has two segments: Reports & Data Dictionary and Searches. Each segment will be discussed at length in the following sections.

The navigational tools on this page are the same throughout WebTrak. See below for a description of each.

Navigational Tools:

- Back** This button will return you to the previous page.
- Log-Out** This button ends the WebTrak session and returns to the log-in page.
- Header Buttons** The buttons at the upper right corner identify the page you are on and, when clicked, return you to pages you've visited.
- Bread Crumbs** Once the page name appears in blue, you may click it to return to that page.
- New Search** Clicking takes you to a new page to enter search criteria.

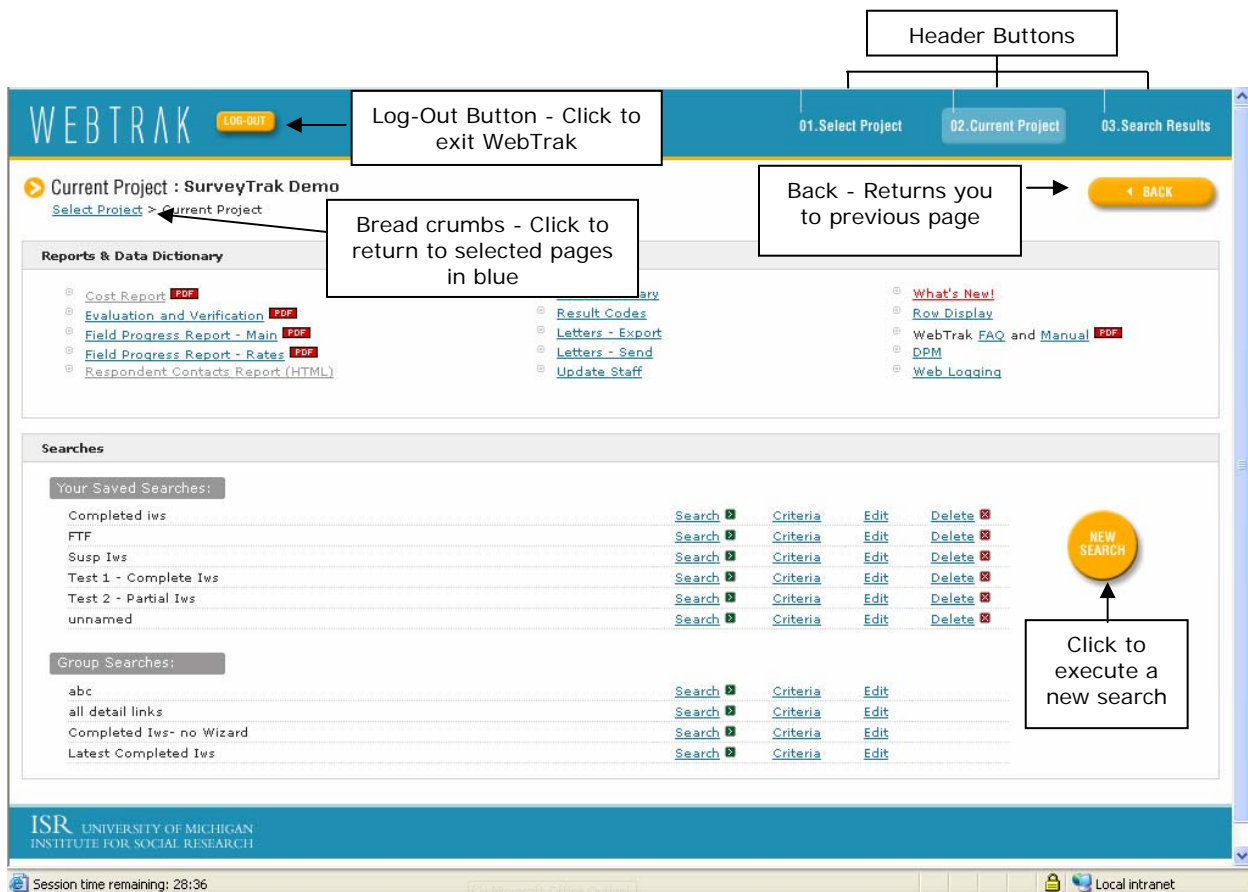


Fig. 3 Current Project Page

Reports & Data Dictionary

The options found under the Reports & Data Dictionary segment are project specific.

Reports

Select the hyperlink of the report to be displayed and a new browser window will launch. The reports are opened in Acrobat Reader (PDF) or HTML format and are printer-friendly. These reports are not interactive; you cannot sort or select any of the text in the document.

There are many features in Acrobat Reader, but the three main ones you may need are as follows:

- **Fit Width:** To enlarge the document and fill the page, click on **Fit Width** button.
- **Saving the Document to Your Hard Drive:** To save a document to your hard drive, single left click on the picture of the floppy disk. After you click on the disk, a pop-up window will appear, and you can choose where to save your document. The default is the My Documents folder on your hard drive. Type in a name for the file and press **Save**. Now the report is on your hard drive, and you can access it when you are offline. This also makes it easier to print.
- **Printing the Document:** To print a PDF report, either press the print icon (a picture of a printer) which is near the bottom left of the toolbar or go to the File menu and select Print. You can then either change the printer/document settings, or just press **Ok** to print.

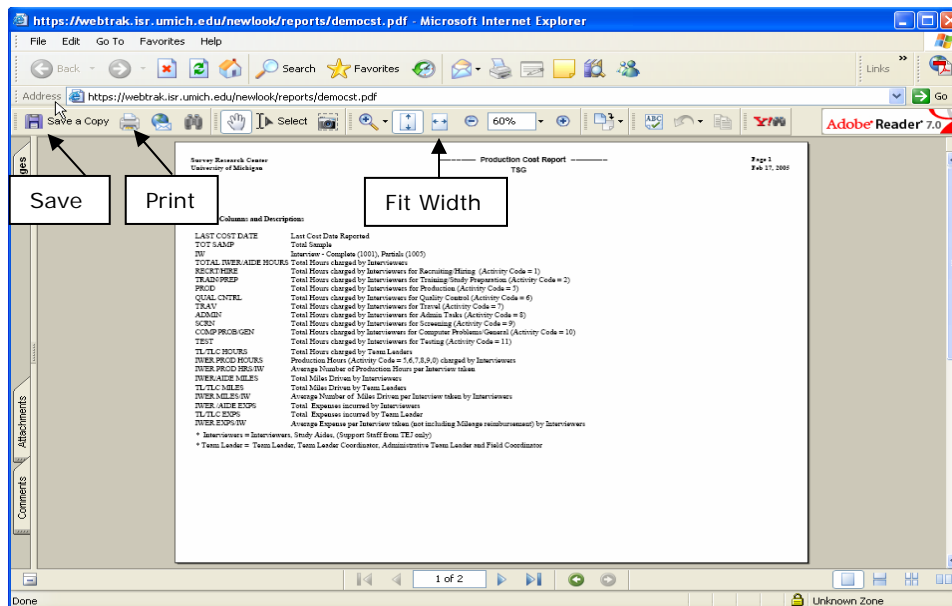


Fig. 4 Acrobat Reader Functions

After reviewing the report, click the “x” in the top right corner to return to the Current Project page.

Respondent Contacts Report (HTML)

A report common to all studies is the Respondent Contacts Report (HTML). This report provides a weekly summary of all 800 calls logged into RCLS (Respondent Contact Logging System) for a particular study. The calls are grouped by purpose of call. To see details of the calls, you would need to access RCLS or SurveyTrak. Click **Back** to return to the Current Project page.

Respondent Contacts Report

• Purpose of Calls - By Project

	Payment	Appointment	Address Update	Deceased	Refusal	General Info	Other	Total Calls
Totals	13	11	5	2	5	8	5	49

• Purpose of Calls - By Week

Week	Payment	Appointment	Address Update	Deceased	Refusal	General Info	Other	Total Calls
06/18/06 - 06/24/06	2	0	2	0	0	0	0	4
06/25/06 - 07/01/06	0	0	0	0	0	0	0	0
07/02/06 - 07/08/06	0	0	0	0	0	0	0	0
07/09/06 - 07/15/06	0	0	0	0	0	0	0	0
07/16/06 - 07/22/06	0	0	0	0	0	0	0	0
07/23/06 - 07/29/06	0	0	0	0	0	0	0	0
07/30/06 - 08/05/06	0	0	0	0	0	0	0	0
08/06/06 - 08/12/06	0	0	0	0	0	0	0	0
08/13/06 - 08/19/06	0	0	0	0	0	0	0	0
08/20/06 - 08/26/06	0	0	0	0	0	0	0	0
08/27/06 - 09/02/06	0	0	0	0	0	0	0	0
09/03/06 - 09/09/06	0	0	0	0	0	0	0	0
09/10/06 - 09/16/06	0	0	0	0	0	0	0	0
09/17/06 - 09/23/06	0	0	0	0	0	0	0	0
09/24/06 - 09/30/06	0	1	0	0	0	0	0	1
10/01/06 - 10/07/06	2	1	0	0	0	0	0	3
10/08/06 - 10/14/06	1	0	0	0	0	0	0	1
10/15/06 - 10/21/06	1	0	0	0	0	2	1	4
10/22/06 - 10/28/06	1	1	0	1	0	0	0	3

Fig. 5 Respondent Contacts Report

Data Dictionary

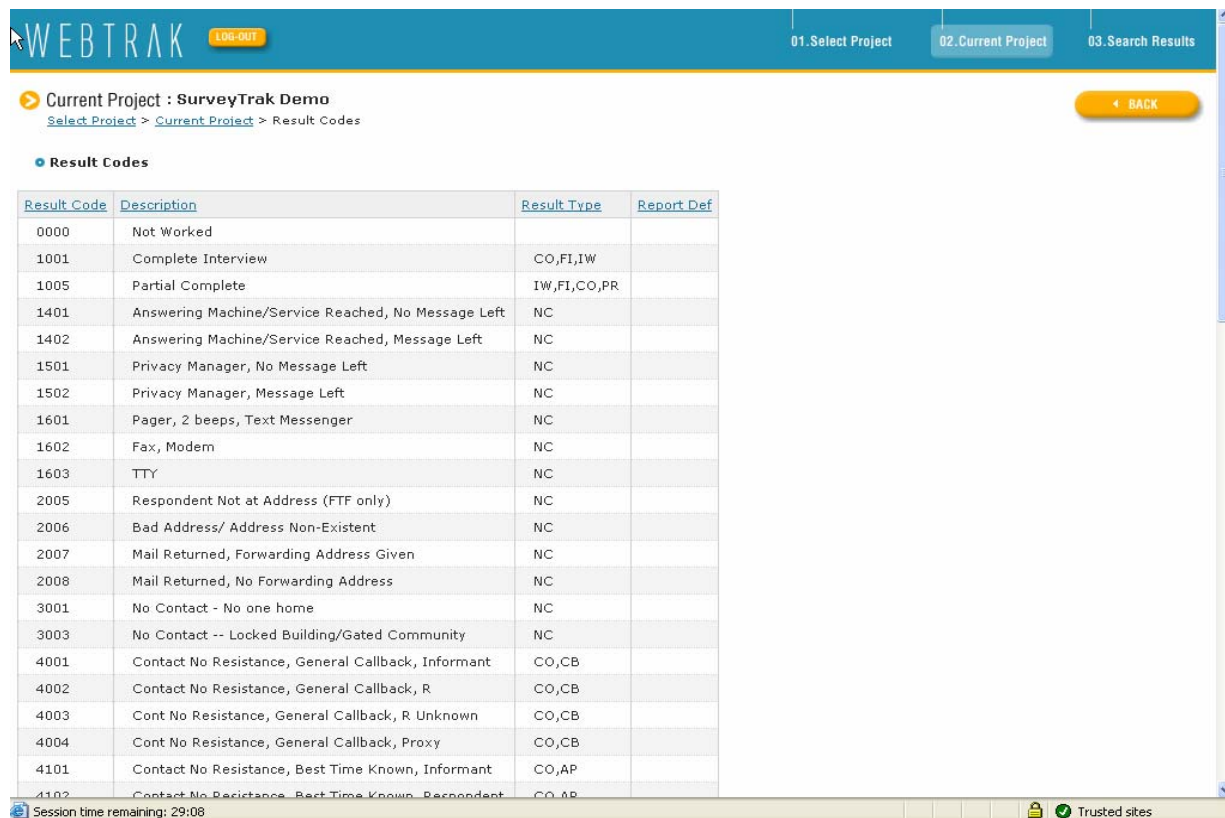
The data dictionary is a project specific guide which identifies where in the SurveyTrak database data are stored. It also indicates the source of those data, whether it's preloaded in Ann Arbor or comes from the interview instrument, SurveyTrak, or WebTrak.

To exit the data dictionary, either click the **Back** button or one of the Bread Crumbs.

Result Codes

Another option accessible from the Reports and Data Dictionary section is Result Codes. This page lists all possible result codes for a given project. In addition to result codes, the reports are based on result type and report definitions.

You may need to use the scroll bar to the right to view all of the result codes available for your project. To exit from this page, click **Back** or one of the Bread Crumbs.



Result Code	Description	Result Type	Report Def
0000	Not Worked		
1001	Complete Interview	CO,FI,IW	
1005	Partial Complete	IW,FI,CO,PR	
1401	Answering Machine/Service Reached, No Message Left	NC	
1402	Answering Machine/Service Reached, Message Left	NC	
1501	Privacy Manager, No Message Left	NC	
1502	Privacy Manager, Message Left	NC	
1601	Pager, 2 beeps, Text Messenger	NC	
1602	Fax, Modem	NC	
1603	TTY	NC	
2005	Respondent Not at Address (FTF only)	NC	
2006	Bad Address/ Address Non-Existent	NC	
2007	Mail Returned, Forwarding Address Given	NC	
2008	Mail Returned, No Forwarding Address	NC	
3001	No Contact - No one home	NC	
3003	No Contact -- Locked Building/Gated Community	NC	
4001	Contact No Resistance, General Callback, Informant	CO,CB	
4002	Contact No Resistance, General Callback, R	CO,CB	
4003	Cont No Resistance, General Callback, R Unknown	CO,CB	
4004	Cont No Resistance, General Callback, Proxy	CO,CB	
4101	Contact No Resistance, Best Time Known, Informant	CO,AP	
4102	Contact No Resistance, Best Time Known, Respondent	CO,AP	

Fig. 6 Result Codes

Letters – Export and Send

The **Letters - Export** link takes you to a batch page containing all pending letter requests for a project. Once the interviewer indicates in SurveyTrak that a respondent needs a particular letter, the request displays here until the letter is exported or disapproved. The requests can be sorted by clicking on your preference in the upper right corner: **Request Date** or **Approver Notes**. Letter requests for each sample ID are numbered sequentially, so **Letter No. 3** next to the sample ID indicates that it is the third letter requested for that sample ID.

In order to produce the letters to be mailed, the user clicks the “Export” checkbox of the letters to be sent, then clicks the “Export” button. When this button is clicked, a new browser window is opened with a list of exported requests. The user saves this window as a text file and imports it into Access or Excel for use in a mail merge program to mass produce the letters.

Export Letter Requests				Sort by: Request Date Approver Notes	EXPORT
SID: 1521-041 Letter No. 1					
Mailto: Mr Thomas Crown Sr 1254 Parker Ave Emerald City MI 63106	Iwer: Test User 46 - TU46 Letter Type: Sympathy Language: English Request Date: 03/02/2005	Letter Status: Pending Export: <input type="checkbox"/> Letter Sent:			
Iwer Notes: Approver Notes:					
SID: 1420-841 Letter No. 3					
Mailto: Mr Thomas Crown Sr 1254 Yellow Brick Rd. Emerald City MI 63106	Iwer: Test User 36 - TU36 Letter Type: Sympathy Language: English Request Date: 03/02/2005	Letter Status: Pending Export: <input type="checkbox"/> Letter Sent:			
Iwer Notes: wife passed away Approver Notes:					
SID: 1310-630 Letter No. 1					
Mailto: Mr. Ricky Martin 123 Cha Cha Cha Lane Ah Reba ND 33333	Iwer: SRO Training User 26 - TU26 Letter Type: Difficulty Completing IW Parts Language: Spanish Request Date: 03/21/2005	Letter Status: Pending Export: <input type="checkbox"/> Letter Sent:			
Iwer Notes: Approver Notes:					

Fig. 7 Letters - Export

Once a letter is exported it is moved to the **Letter - Send** page. This is another batch page and it allows the user to send (approve) multiple letter requests at once. The user checks the “Letter Sent” checkbox of the applicable requests, enters the date the letters were sent in the “Date Letters Sent” field, then click the “Mark Sent” button. The letter requests are then marked as sent and removed from this page.

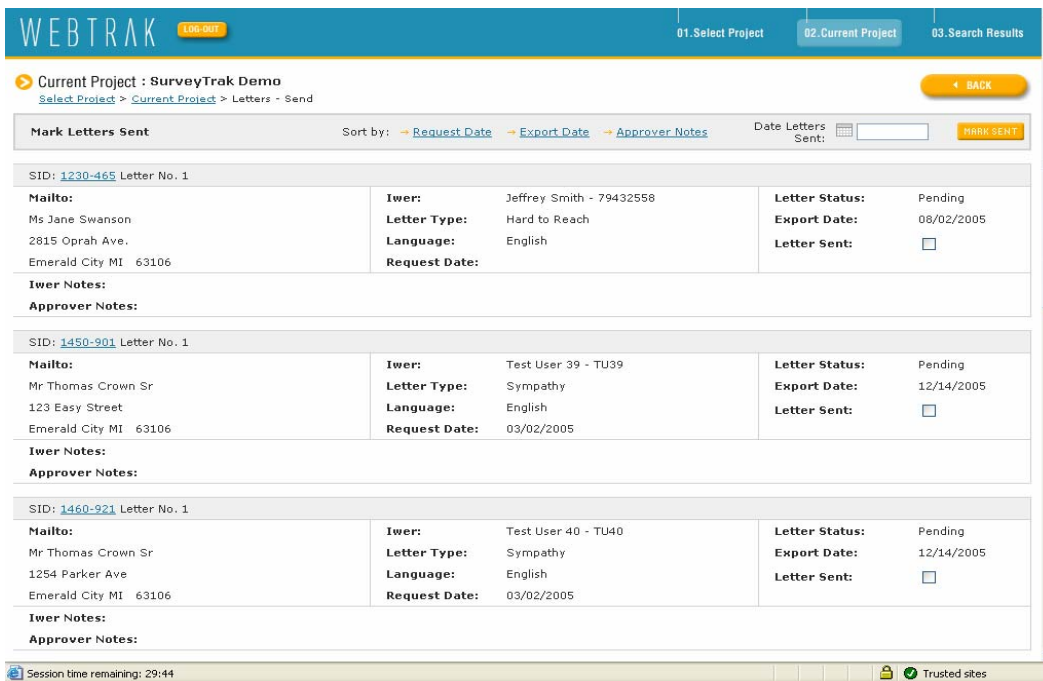


Fig. 8 Letters - Send

Sent and disapproved letter requests can be viewed by clicking on the **L** link in the Details column of the Sample page.

A letter request can be disapproved from either of these batch pages by clicking on the Sample ID link, then clicking the Disapprove check box in the Pending Letter Requests section.

Update Staff

The **Update Staff** link allows the user to change an interviewer's assignment or permissions, and add interviewers to a project. Only users with authorization to perform these tasks will be able to view this link.

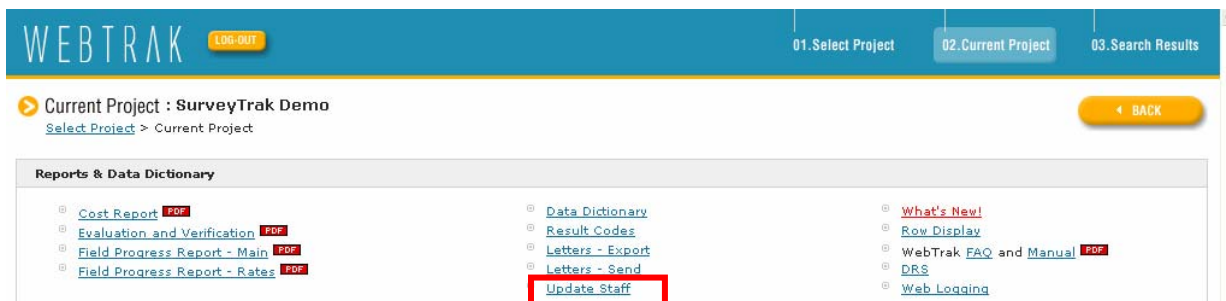


Fig. 9 Update Staff Link

The first page you come to after clicking **Update Staff** is the Update Staff page. This is a list of all staff members currently assigned to the project and includes id numbers, TL and PM information, and permissions for WebTrak access, payment approval, group searches and SurveyTrak status.

Iwer ID	Iwer Name	Role	TL ID	TL Name	PM ID	PM Name	WebTrak Access	Approve Payments	Create Group Search	Update Staff	SurveyTrak Status
85969388	Baker, Jeannie	Interviewer	43370107	Skoman, Marsha	98316575	Pattullo, Genise	Yes	No	No	Yes	Active
72440438	Burns, Alixandra	In-House Staff					Yes	No	No	No	Inactive
01835779	Casey, Dianne	In-House Staff					Yes	No	No	No	Inactive
79178487	Cheung, Gina-Qian	Interviewer	53583734	Guyer, Heidi	98316575	Pattullo, Genise	Yes	Create	Yes	Yes	Active
69114547	Freeland, Sara	Interviewer	53583734	Guyer, Heidi	98316575	Pattullo, Genise	No	No	No	No	Active
53583734	Guyer, Heidi	Team Leader	53583734	Guyer, Heidi	98316575	Pattullo, Genise	Yes	Approve	Yes	No	Active
12243721	Hemingway, Lloyd	Interviewer	53583734	Guyer, Heidi	98316575	Pattullo, Genise	No	No	No	No	Active
ahupp	Hupp, Andrew	In-House Staff					Yes	No	No	No	Inactive
41265472	Kim, Il-hwan	In-House Staff					Yes	No	Yes	No	Inactive
82916819	LaDronka, Kathleen	Interviewer	43370107	Skoman, Marsha	98316575	Pattullo, Genise	Yes	Approve	No	No	Active
16237770	Laidlaw, Joe	In-House Staff					Yes	No	No	No	Inactive
30537009	Li, Tong	Interviewer	53583734	Guyer, Heidi	98316575	Pattullo, Genise	No	No	No	No	Active
29014732	Logan, Maudine	In-House Staff					Yes	No	No	No	Inactive
sparker	Parker, Sharon	In-House Staff					Yes	No	No	Yes	Inactive
98316575	Pattullo, Genise	Team Leader	43370107	Skoman, Marsha	98316575	Pattullo, Genise	Yes	Approve	Yes	Yes	Active
51495764	Philippou, Ruth	In-House Staff					No	Approve	Yes	No	Inactive
82630070	Pierce, Andrea	Interviewer	43370107	Skoman, Marsha	98316575	Pattullo, Genise	No	No	No	No	Active
50804195	Ragland, Yvonne	Interviewer					No	No	No	No	Active
37404033	Rosenbaum, Jennifer	In-House Staff					No	No	No	No	Inactive
tinaschn	Schneider, Tina	In-House Staff					Yes	No	No	No	Inactive

Fig. 10 Update Staff Page

Clicking on a column heading, such as “Iwer Name,” will sort the list according to that heading. The three hyperlinks, **Add New Employee**, **Update Employee**, and **Update Assignments** encompass the options available on this page.

Add New Employee

You may add an employee to the project by clicking the **Add New Employee** link. This link takes you to the Find Staff Person page, Fig. 11. The employee must exist in the database already in order to add him or her.

Search Results : SurveyTrak Demo
 Select Project > Current Project > Update Staff > Find Staff Person

Find Staff Person

ID

Last Name

First Name

Fig. 11 Find Staff Person Page

You do not need to fill in all the blanks on this page. Entering an ID number, last name or first name will generate a list from which to choose the correct employee. You may also enter just the first few letters of a first or last name. Once you have selected the new employee, click Add New. If the person you want to add is not among this list, you may want to re-try using Find Again.

Once you have clicked on the Add New button, you will be taken to a page where you assign a role and preferences for the new employee. After this information is added, the employee will appear on the Staff List.

Update Employee

There are two ways to update an employee's permissions. You can either click on the employee name or employee ID in the Staff List or click on the hyperlink, **Update Employee**. Clicking on the employee name takes you directly to the page below. Here you are allowed to change the employee's supervisor, WebTrak Access, Approve Payments permission, and Create Group Searches permission. Once the appropriate changes are made, click on the **Change** button.

WEBTRAK LOG-OUT 01. Select Project 02. Current Project 03. Search Results

Search Results : SurveyTrak Demo ← BACK

Select Project > Current Project > Update Staff > Update Employee

Update Employee	
Employee	85969388 - Jeannie Baker
Supervisor	Skoman, Marsha
WebTrak Access	Yes
Approve Payments	No
Create Group Searches	No
<input type="button" value="Change"/>	

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Fig. 12 Update Employee Page

If you click on the **Update Employee** hyperlink, you will be taken to the Find Staff Person page, Fig. 11. This allows you to first search for the employee's name when the staff list is lengthy. Once you identify the correct person, you will be taken to the Update Employee page shown directly above.

Update Assignments

Supervisory assignments can be updated by clicking the **Update Assignments** hyperlink. Once clicked, you are taken to a page listing PMs and TLs for the project. Selecting a PM will generate a list of TLs and selecting a TL will produce a list of interviewers. Choose the name to which you want to assign another employee and click **Next**. Only one name may be selected when you click **Next**. The other column must specify "-select-."

Pick the interviewer (or TL if you chose to change an PM assignment) you want to move and click the >> button. You are allowed to make more than one move on this page, so proceed with further changes if necessary. If you move someone who shouldn't be moved, simply highlight the name and click <<. Once you are finished, click the **Assign** button and you will be returned to the Staff List page where you can view your updates.

What's New!

This is a new feature in WebTrak which highlights some of the key differences between the previous version of WebTrak and the one you are viewing now. All of the new features are explained in detail in this manual. Click **What's New!** for a brief overview.

Row Display

Row display allows you to select the number of rows to be displayed on the Sampleline and Addresses pages.

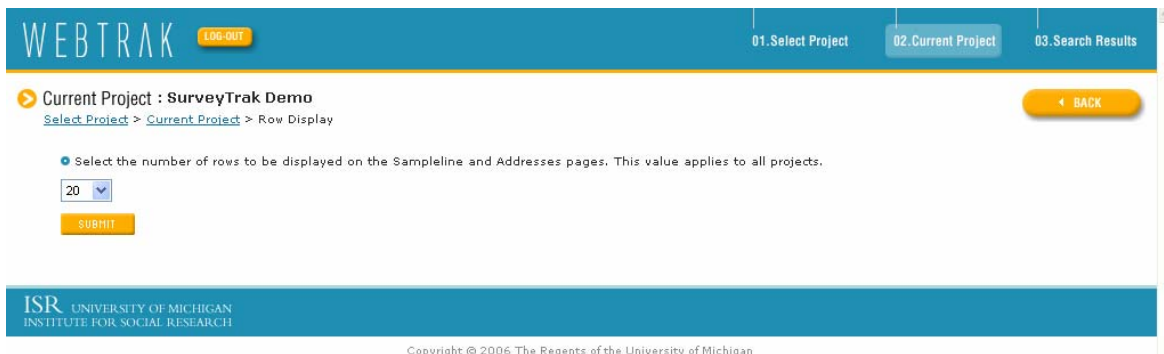


Fig. 13 Row Display

WebTrak FAQ and Manual

Clicking **FAQ** will lead you to a resource page of Frequently Asked Questions regarding WebTrak. Many of your questions will be answered on this page, so you may want to check it before calling the Help Desk.

Clicking **Manual** will open a new Adobe Reader window containing the WebTrak Manual.

DRS

The **DRS** (Dynamic Reporting System) link takes you to the DRS website.

Web Logging

This link directs you to a log-in page for SRO Logging.

Searches

The lower segment of the Current Project page is dedicated to search functions. Any saved searches will be shown on this page. Until a search is saved, "You have no saved searches" or "There are no group searches" will be displayed. After you have created a search, it will be listed under "Your Saved Searches." Group Searches are located beneath your saved searches.

In any case, the name of the search is listed on the left and on the right are four hyperlinks:

- Search** Executes the defined search. The search is rerun each time you press **Search**, so all of the sample lines that are in the database at that moment and that fit your search criteria will be displayed.
- Criteria** Displays a list of all the possible criteria for the search and lists the values actually used in the search.
- Edit** Allows the search criteria to be modified.
- Delete** Removes the existing search. This option is not available for Group Searches unless you created the search.

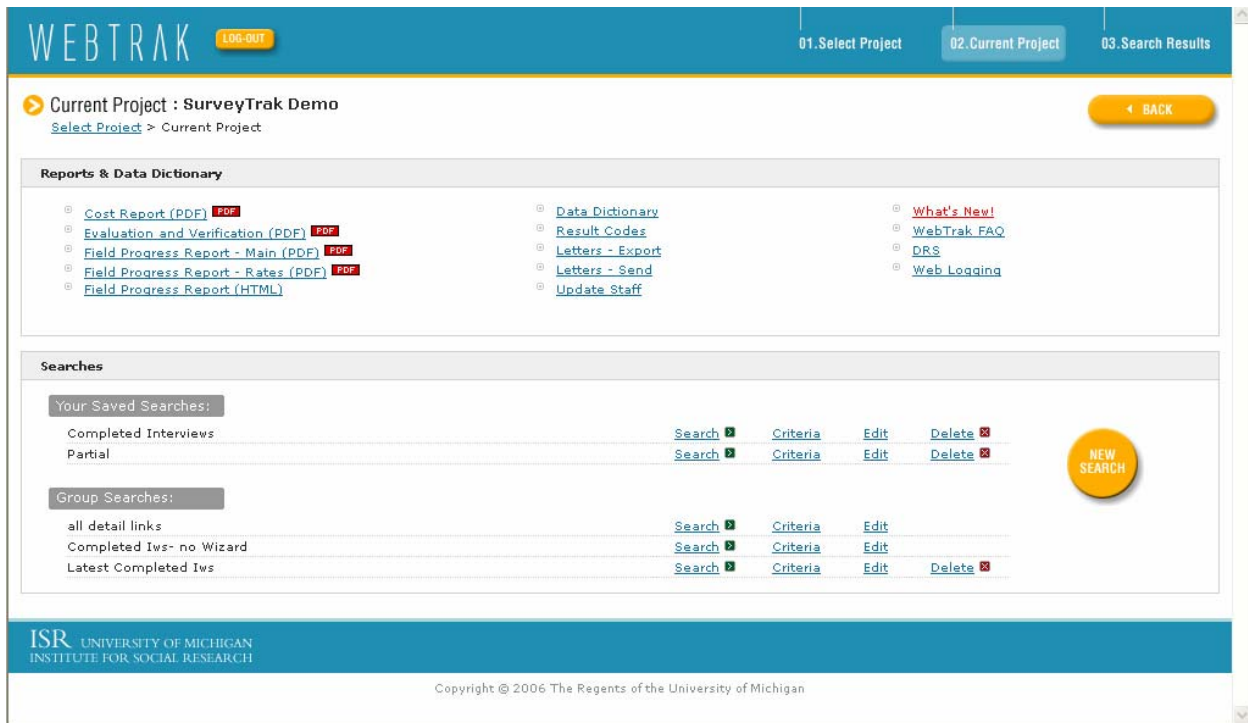


Fig. 14 Searches

New Searches

To create a new search, first click on the gold **New Search** button found on the Current Project page. You will be taken to the New Search page where you must determine the criteria for your search. WebTrak offers a variety of choices, which include: **Results, IW Status, Field Staff, Instrument & Sample, Sampleline ID, Evaluation, Letters, Payments, Respondent, and Verification**. Depending on the project requirements, other options may be displayed.

The following are the basic steps required to create a search:

1. From the Current Project page, click the **New Search** button.
2. Enter a descriptive name for the search in the field "Name of Search." **Note:** *WebTrak automatically names the search "unnamed" if you save it without giving it a name.*
3. Select your criteria for the search on the various tabs. See the following tab descriptions for details. **Note:** *Criteria can be entered on more than one tab.*
4. Click on the **Search** or **Search + Save** button. **Search** will execute the search according to your criteria without saving it. **Search + Save** will save the search and execute it at the same time.

Group Searches

WebTrak has the ability to allow searches to be set up by a manager and then be available for all managers and supervisors to use. The manager who creates the original group search retains edit rights to that search. All supervisors and managers have the ability to "save as" the group searches in order to customize these searches for their own needs.

Contact your production manager to get the permissions to create group searches.

Users with group search permissions will see a **Group Save** button on the New Search page. Once you select your criteria, click the **Group Save** button. The search is saved as a group search and the user is returned to the Current Project page.

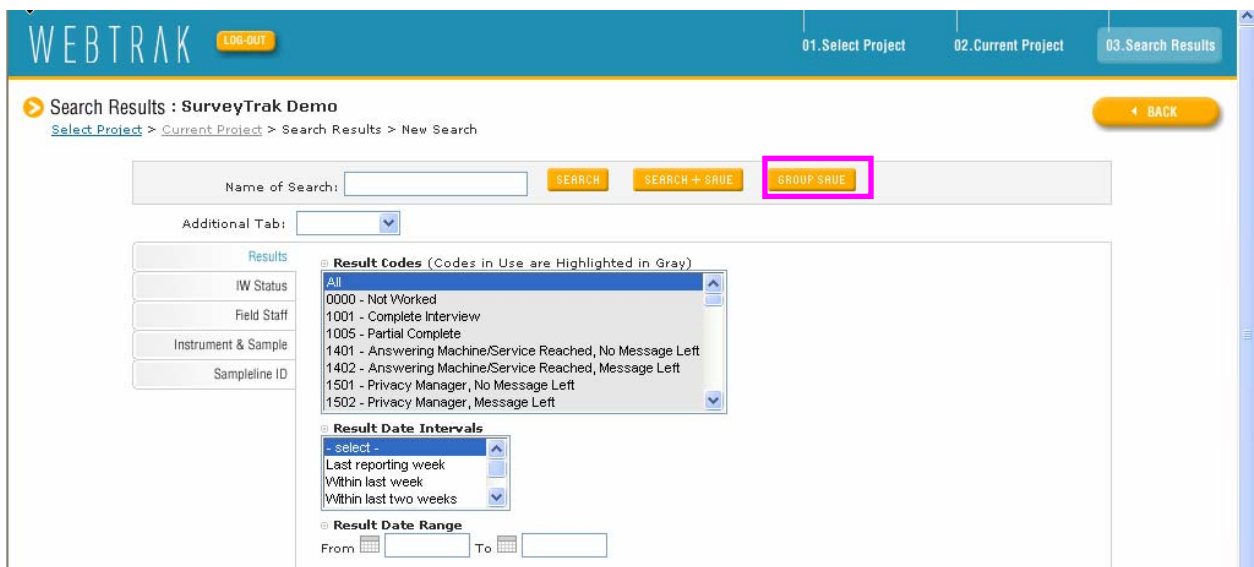


Fig. 15 Group Save

Search Criteria Tabs

Search criteria can be specified while creating a new search on the New Search page, or editing a saved search on the Edit Search page. As mentioned previously, search criteria may include the following: **Results**, **IW Status**, **Field Staff**, **Instrument & Sample** and **Sampleline ID**.

Additionally, search criteria can include **Evaluation**, **Letters**, **Payments**, **Respondent** and **Verification**. See the Additional Tab section on page 14 for adding these tabs.

The search criteria work together using a “logical and.” That means that your search will only bring up sample lines that meet all of the criteria that you have entered. If you don’t enter any criteria, all of the sample lines for the project will be displayed.

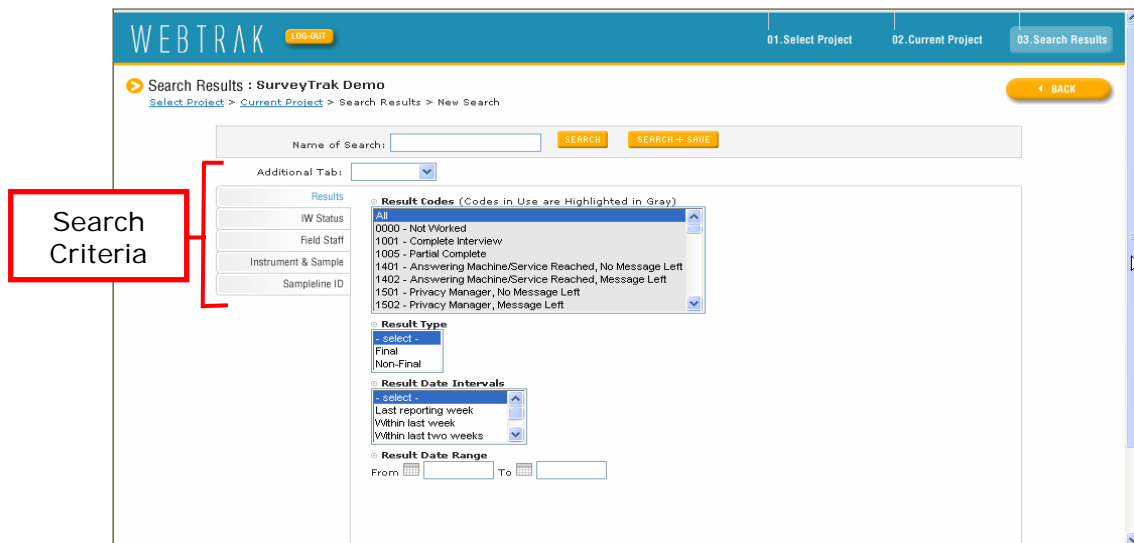


Fig. 16 Search Criteria

Additional Tab

In order to do searches based on **Call Wizard**, **CaseTrak**, **Evaluation**, **Letters**, **Payments**, **Respondent**, or **Verification**, you must first select the appropriate tab option from the Additional Tab dropdown menu. Once an option is selected, it will appear as the last tab on the Search Criteria list to the left.

Multi-Select Criteria

For all of the criteria where there is a drop down list of options, multiple options can be selected from the list. If you want the search to include all of those options, you can highlight all of them or select the "All" option. "All" is usually found at the top of the list. If you only want to search for some of the options, you will need to highlight specific values. This can be accomplished in two ways:

To select nonadjacent codes in WebTrak drop down lists, click the code. Hold down <Ctrl> and click on each additional code. To select adjacent codes in the WebTrak drop down lists, click the first code in the sequence. Hold down <Shift> and click on the last code in the list code.

***Tip:** If you select a code you don't want, hold down <Ctrl> and click the code again.*

For example, to find all the interviews that have specific result codes, perform the following steps.

- Click on the New Search button
- In the field "Name of Search" type "Test3"
- In the Result Codes box, scroll down and click on "4001"
- Hold down the <Shift> key and at the same time click on "4002"
- Hold down the <Ctrl> key and at the same time click on "4101"
- Click on **Search + Save**

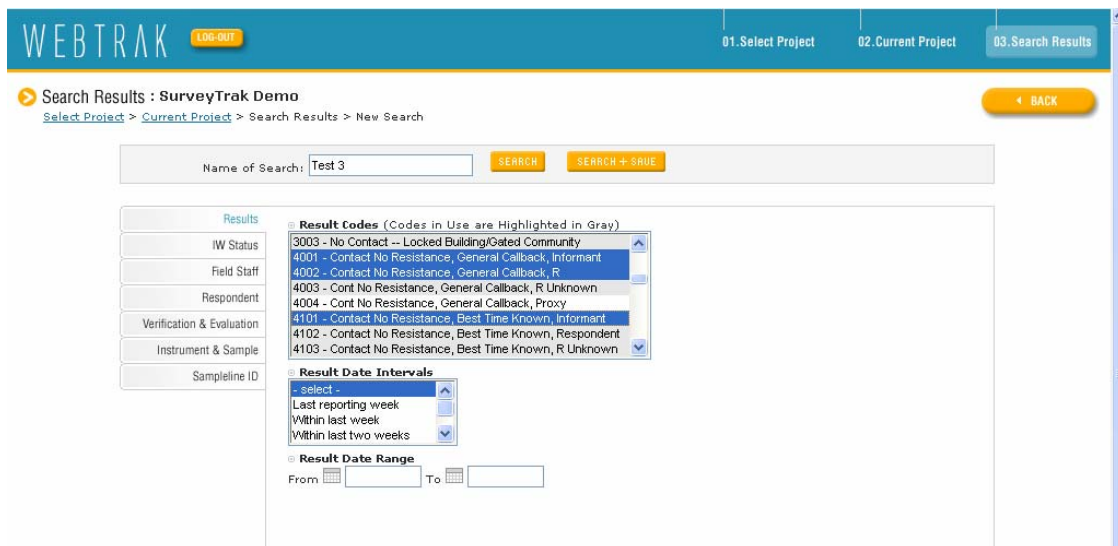


Fig. 17 Multi Select Search Criteria

Results

The first tab on the left is the **Results** tab. This is the default tab and will always appear first when creating or editing a search.

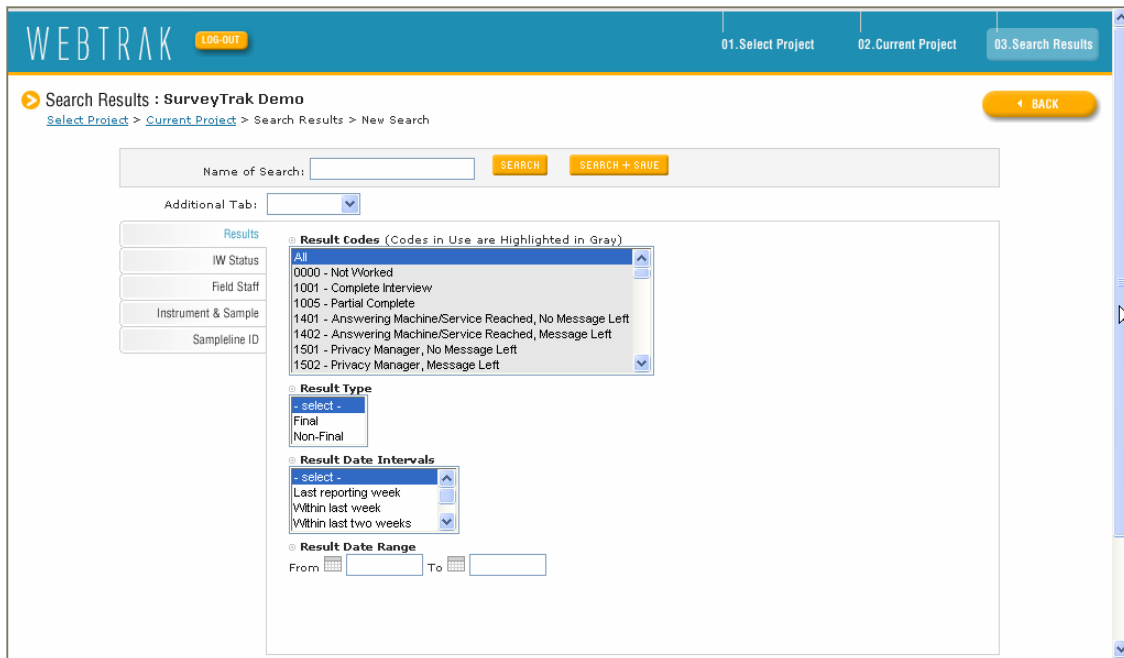


Fig. 18 Results Tab

Results Tab Options

Result Codes

Codes currently in use for the project you selected are highlighted in gray. The search only looks at the most recent result code entered in the Call Wizard. For example, if a case is now coded 1001, but it was once coded 4201, it will show up in a search for 1001, but not 4201. To select more than one option, see Multi Select Criteria.

Result Type

Allows user to search according to “Final” or “Non-Final” result codes.

Result Date Intervals

Week related intervals are provided from which to select. If you choose this option, WebTrak will always search this specified date range automatically.

The intervals are:

- Last reporting week - returns result dates from Sunday through Saturday of the previous week.
- Within last week - means the last 7 days prior to today. For example, if today is July 24th, this search will return result dates July 17th through July 23rd.
- Within last two weeks
- Older than last week
- Older than last two weeks

Result Date Range

If you click on the calendar icon to the left of the date fields, a calendar will pop-up on your page. It displays the current month, and highlights the current day in yellow. The double arrows in the top left and top right corners of the box move backwards and forwards one month respectively. The minus sign and the plus sign next to the year box in the window move backwards and forwards one year.

Click on the day of the month to select it. The calendar pop-up window will disappear, and the date will appear in the field. Once you've selected a date, you can change it by going back into the calendar pop-up window.

"From" field – If this field is left blank, the result dates displayed in the search results will be from the beginning of the project to the date entered in the "To" field.

"To" field – If this field is left blank, the result dates displayed in the search results will be starting at the date entered in the "From" field to today.

Note: *If you are searching for one day, that date must be entered in both the "From" field and the "To" field.*

You are not required to use the pop-up calendar; you may type in the date directly. However, we encourage the use of the pop-up calendar for proper date formatting.

IW Status

IW Status tab allows you to create searches based on the status of the interview. Several options are available for your customized search.

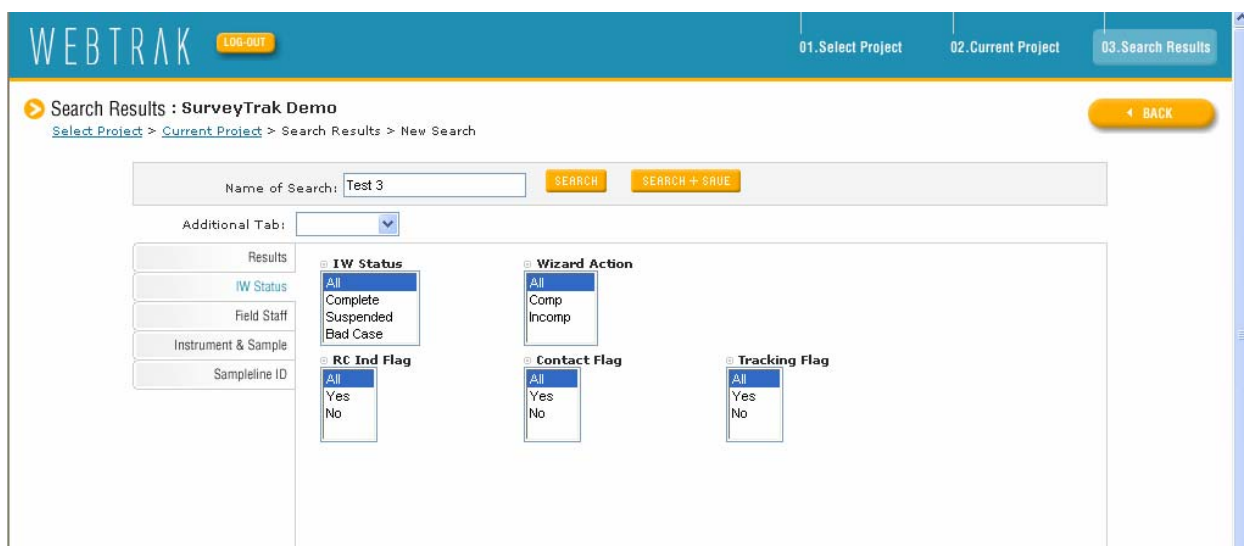


Fig. 19 IW Status Tab

IW Status Tab Options

IW Status

When an interview has been finished, the IW status is complete. If an interviewer exits prematurely and all the questions are not answered, the status will be suspended.

Wizard Action

Indicates if the Wizard Actions have been completed for a given Result Code including Interviewer Observations.

RC Ind Flag

Refusal Conversion Indicator. Selecting "Yes" will return any lines that have a refusal result code type. This corresponds to the * in the RC Ind column on the Sample tab in SurveyTrak.

Contact Flag

Selecting "Yes" will return the sample lines where the last attempt resulted in contact with someone. "No" will return all the sample lines where the last attempt did not result in a contact. See the Result Code list for all the result code types.

Tracking Flag

This is a fast way of selecting all the sample lines that are in tracking. Selecting "Yes" will return the samplelines where the last call record is a result code type of tracking.

Field Staff Tab

The third tab is the **Field Staff** tab. Here you can select search criteria based on particular people. The default for all of these fields is "-select-." You can leave this highlighted unless you want to search based on someone in that column. If you click on "All," you will see the sample lines belonging to everyone in that group (and since directly or indirectly every line is assigned to someone in every group, this means you will see all of the lines).

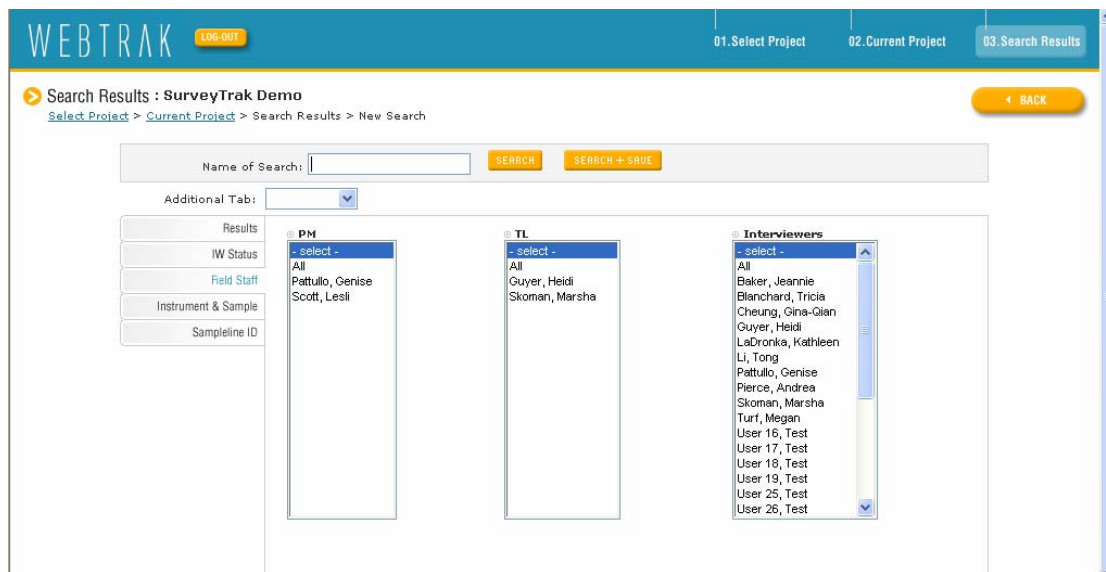


Fig. 20 Field Staff Tab

Note: The management levels that are displayed on this tab are project specific. For example, some projects have only TLs and interviewers.

Field Staff Tab Options

- PM** Selecting a PM (project manager) displays all of the sample lines belonging to the PM, TLs (team leaders) or interviewers assigned that PM.

- TL** Selecting a team leader from this column displays all of the sample lines belonging to the TL and any of the interviewers under that TL.

- Interviewers** Displays all of the sample lines belonging to that interviewer.

Instrument & Sample Tab

The options on this tab can change based on the project requirements. Below are some of the common options typically found on most projects.

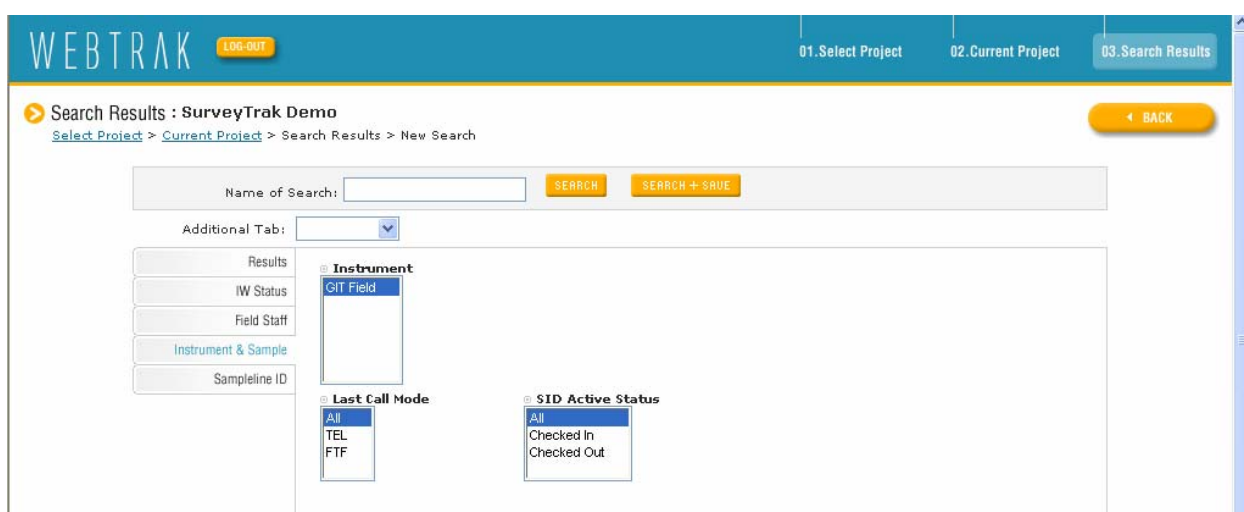


Fig. 21 Instrument & Sample Tab

Instrument & Sample Tab Options

- Instrument** If a project has multiple Blaise instruments, they will be available for selection.

- Last Call Mode** Allows selection of mode for the last call record for each interview. The options are "All," "TEL" and "FTF."

- SID Active Status** The option "Checked In" refers to the lines that have been selected on the laptop for "Check In" from the SurveyTrak menu option. Please contact the Interviewer Help Desk to have the line checked back out to the same or another interviewer.

Sampleline ID Tab

This tab allows for searching for complete Sampleline ID's or doing a partial search on the Sampleline ID.



Fig. 22 Sampleline ID Tab

Sampleline ID Tab Options

Enter whole Sampleline ID's separated by commas.

Enter a particular SID or set of SIDs. Enter all of the numbers of the SID.

Note: *The search will find the SID with or without the hyphen.*

To enter multiple SIDs, separate them by commas.

Enter a single, partial Sampleline ID using an asterisk as a wildcard.

Allows for searches with only some of the SID. Useful when a digit in the SID represents a specific group.

Examples:

To search for all the ids that begin with 123, enter: 123*

To search for all the ids that end with 123, enter *123

To search for the ids that have 123 somewhere in them, enter *123*

Evaluation Tab

The **Evaluation** tab allows searches based on interviewer evaluations performed in WebTrak. Also on this tab is the ability to select the interviews that have been taped.

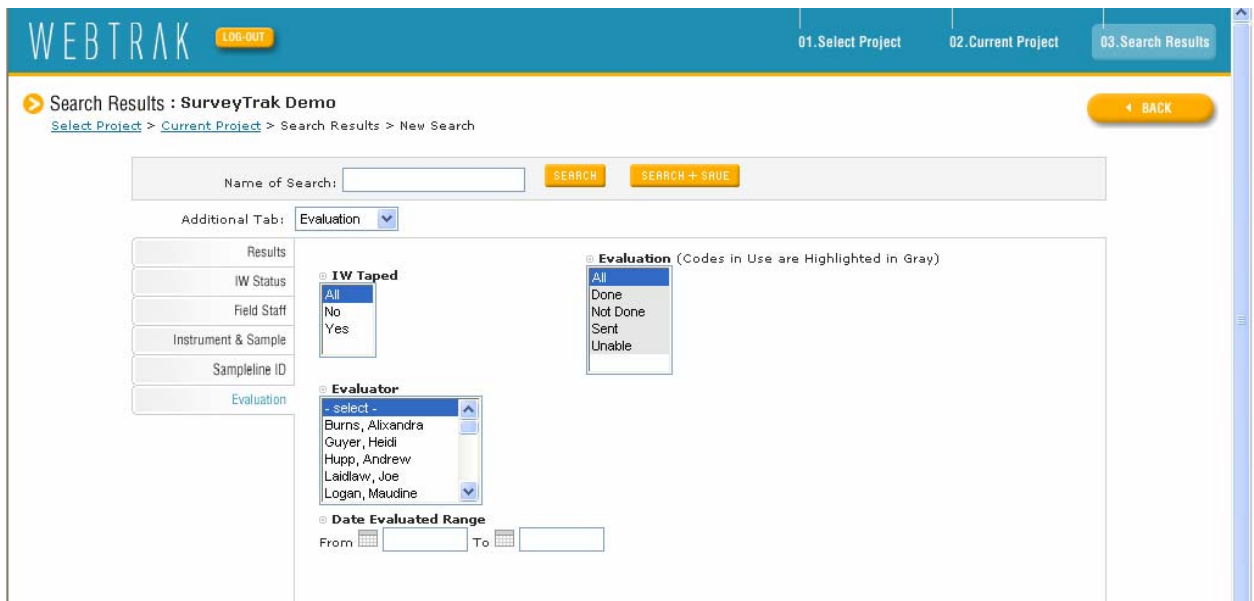


Fig. 23 Evaluation Tab

Evaluation Tab Options

- IW Taped** Allows you to search for interviews that have been taped by selecting "Yes."
- Evaluation** Lists status options of the evaluations being searched. The options that have actually been used thus far in the project will be highlighted in gray.
- Evaluator** Allows you to search for evaluations performed by a specific person.
- Date Evaluated Range** Enter dates in this format, 00/00/0000, or use pop-up calendar provided.

Letters Tab

The **Letters** tab allows for you to search for letters meeting criteria you determine using the options listed. **Letters** tab options are study specific.

The screenshot shows the 'Letters' tab search interface in the WebTrak system. At the top, there is a navigation bar with 'WEBTRAK' and 'LOG-OUT' on the left, and '01. Select Project', '02. Current Project', and '03. Search Results' on the right. Below the navigation bar, the page title is 'Search Results : SurveyTrak Demo' with a 'BACK' button. The main content area includes a search form with a 'Name of Search:' field, 'SEARCH', and 'SEARCH + SAVE' buttons. Below this is an 'Additional Tab:' dropdown set to 'Letters'. On the left, there is a sidebar with a list of search criteria: Results, IW Status, Field Staff, Instrument & Sample, Sampleline ID, and Letters (which is highlighted). The main search area contains several filter sections: 'Status' (Pending, Sent, Not Approved), 'Type' (Difficulty Completing IW Parts, Hard to Reach, More Info), 'Language' (English, Spanish), 'Requestor' (LI, Tong, Pettullo, Genise, Peng, Hueichen, Skoman, Marsha, Smith, Jeffrey), 'Date Requested Range' (From/To date pickers), and 'Date Sent Range' (From/To date pickers).

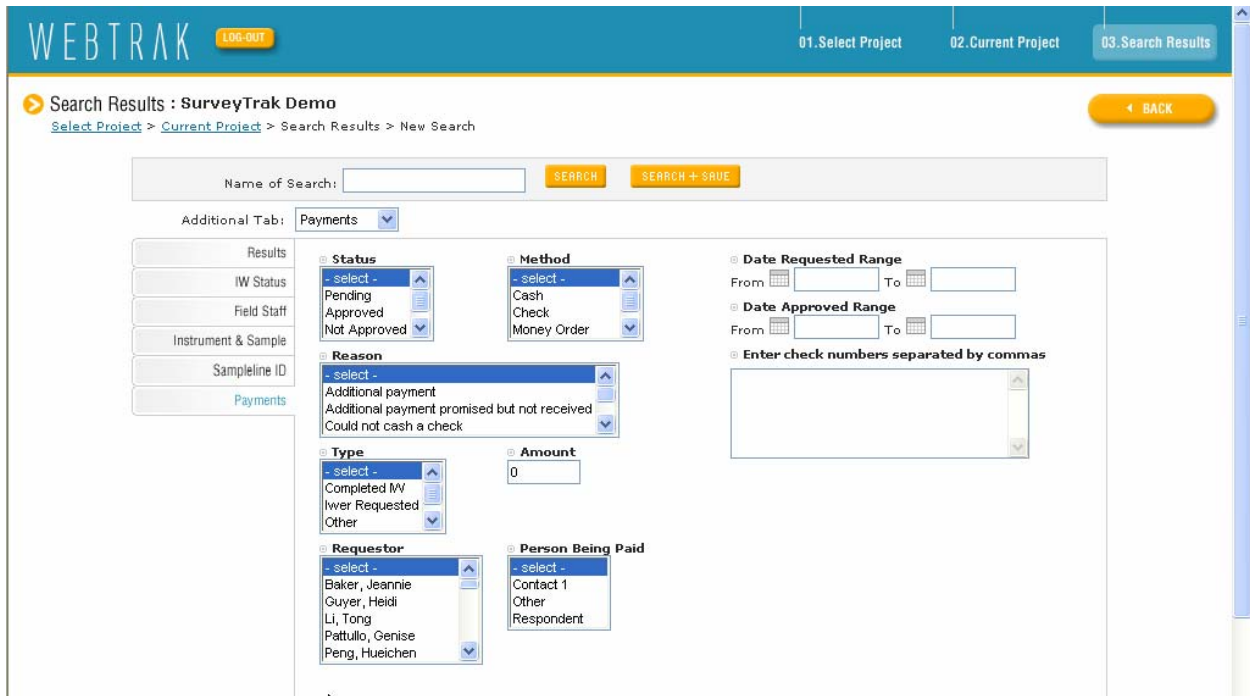
Fig. 24 Letters Tab

Letter Tab Options

- Status** Choose the status, pending, sent or not approved, of the letters you
- Type** Choose the type of letter you are searching for: difficulty completing IW parts, hard to reach, more info, other, refusal/resistance, or sympathy.
- Language** Searches based on English or Spanish letters.
- Requestor** Performs a search based on who requested the letter.
- Mail To** Searches based on to whom the letter is mailed.
- Date Requested Range** Use this format, 00/00/0000, or the pop-up calendar provided to specify a date range in which letters were requested.
- Date Sent Range** Use this format, 00/00/0000, or the pop-up calendar provided to specify a date range in which the letters were sent.

Payments Tab

The **Payments** tab makes it easy to check respondent payment status. You can search for payments based on a number of criteria as outlined below. The default for many of these payment options is “select.” If you do not wish to use that option as criteria for your search, leave “select” highlighted. **Payments** tab options are study specific.



The screenshot shows the SurveyTrak interface for the Payments tab. At the top, there is a navigation bar with 'WEBTRAK', a 'LOG-OUT' button, and three tabs: '01. Select Project', '02. Current Project', and '03. Search Results'. Below the navigation bar, the page title is 'Search Results : SurveyTrak Demo' with a 'BACK' button. A breadcrumb trail reads 'Select Project > Current Project > Search Results > New Search'. The main search area includes a 'Name of Search:' field with 'SEARCH' and 'SEARCH + SAVE' buttons. Below this is an 'Additional Tab:' dropdown set to 'Payments'. A sidebar on the left lists navigation options: 'Results', 'IW Status', 'Field Staff', 'Instrument & Sample', 'Sampleline ID', and 'Payments' (highlighted). The main search area contains several filter sections: 'Status' (Pending, Approved, Not Approved), 'Method' (Cash, Check, Money Order), 'Date Requested Range' (From/To date pickers), 'Date Approved Range' (From/To date pickers), 'Enter check numbers separated by commas' (text input), 'Reason' (Additional payment, Additional payment promised but not received, Could not cash a check), 'Type' (Completed IV, Iwver Requested, Other), 'Requestor' (Baker, Jeannie, Guyer, Heidi, Li, Tong, Pattullo, Genise, Peng, Hueichen), and 'Person Being Paid' (Contact 1, Other, Respondent).

Fig. 25 Payments Tab

Payments Tab Options

Status	Searches for payment info based on status: Pending, Approved, Not Approved, N/A.
Method	Conducts search based on method of payment.
Reason	These reasons cover unusual circumstances regarding respondent payment. When searching for typical respondent payments, leave “select” highlighted.
Type	This option is study specific.
Amount	Enter a dollar amount here. Acceptable formats include: 10, \$10, \$10.00.
Requestor	Searches payments requested by a particular person.
Person Being Paid	Conducts search by payee type from SurveyTrak.
Date Requested	Enter dates using this format, 00/00/0000, or use the

Range pop-up calendar to select dates.

Date Approved Range Enter dates using this format, 00/00/0000, or use the pop-up calendar to select dates.

Respondent Tab

The **Respondent** tab information is drawn from the information in the address tabs of the View/Edit window of SurveyTrak.

This tab will make partial matches. For example, if you enter "Ann" in the "City" field, it will give you all of the entries for "Ann Arbor."

The screenshot shows the WebTrak interface for search results. At the top, there is a navigation bar with 'WEBTRAK' and a 'LOG-OUT' button. Below this, there are three tabs: '01. Select Project', '02. Current Project', and '03. Search Results'. The main content area is titled 'Search Results : SurveyTrak Demo' and includes a breadcrumb trail: 'Select Project > Current Project > Search Results > New Search'. A 'BACK' button is located in the top right corner. The search interface features a 'Name of Search:' field with 'SEARCH' and 'SEARCH + SAVE' buttons. Below this, the 'Additional Tab:' is set to 'Respondent'. A sidebar on the left lists search criteria: 'Results', 'IW Status', 'Field Staff', 'Instrument & Sample', 'Sampleline ID', and 'Respondent'. The main search area contains several fields: 'First Name', 'Last Name', 'Address 1', 'Address 2', 'City', 'State' (a dropdown menu with 'All', 'Alabama', 'Alaska', and 'Arizona' visible), 'Zip', and 'Phone'. A 'Person Type' dropdown menu is also present, showing options 'R', 'C2', and 'C'.

Fig. 26 Respondent Tab

Respondent Tab Options

- First Name** Enter the first name of the respondent
- Last Name** Enter the last name of the respondent
- Address 1** Enter any portion of the address
- Address 2** Second line of the address information
- City** Enter the city
- State** Use the scroll bar to select the state
- Zip** Enter the zip code
- Phone** Enter phone number including area code into this field. If the project has a Phone 2 field in SurveyTrak, WebTrak automatically searches both Phone 1 and Phone 2.

Person Type R=respondent, C=contact, 2C=2nd contact. Corresponds to the SurveyTrak tab.

Verification Tab

This tab allows searches based on interview verifications performed in WebTrak.

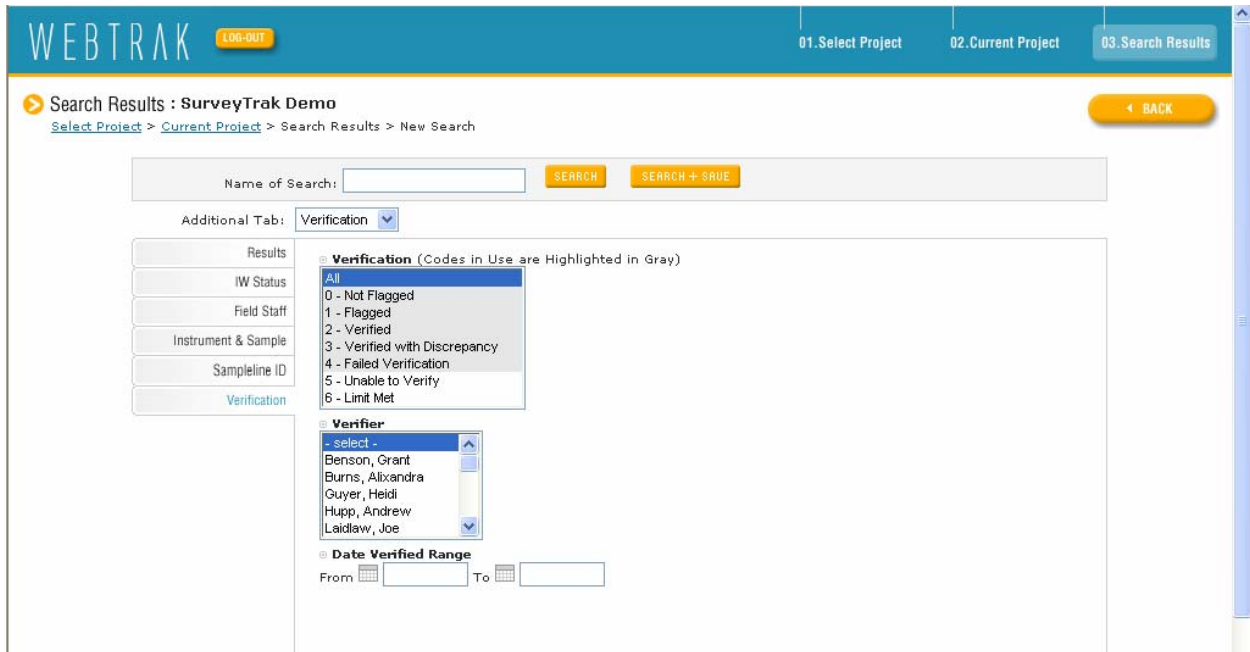


Fig. 27 Verification Tab

Verification Tab Options

Verification Allows you to search for verification flags. The options that have actually been used thus far in the project will be highlighted in gray.

Verifier Allows you to specify the verifier for the interview.

Date Verified Range Type in the date or use the pop-up calendar to specify the date in which you believe the interview was verified.

Search Results

Sample Page

Once **Search + Save** or **Search** is selected, the search results will be displayed on the Sample page. The columns on this page vary from project to project depending on the project's requirements.

WEBTRAK LOG-OUT 01. Select Project 02. Current Project 03. Search Results

Search Results : SurveyTrak Demo ← BACK

Select Project > Current Project > Search Results > Sample

Sample Addresses Interviewers Evaluations Verifications Criteria New Search

answering machine Edit

Displaying records 1 through 8 of 8

Details	<u>Sample ID</u>	<u>Ckd In</u>	<u>RC Ind</u>	<u>Interviewer</u>	<u>Result Date</u>	<u>Result</u>	<u>Wizard Action</u>	<u>IW Taped</u>	<u>IW Status</u>	<u>Last Call Mode</u>	<u>FTF Calls</u>	<u>TEL Calls</u>	<u>IW Length</u>	<u>Verification</u>	<u>Evaluation</u>	<u>Sample ID</u>
A C N R	1040-082	Y	0	Pattullo, Genise	07/29/2004	1401		No	Susp	TEL	0	1		V	E	1040-082
A C H R	1040-085	Y	0	Li, Tong	09/09/2004	1401		No		TEL	0	1		V	E	1040-085
A C R	1060-130	Y	0	Turf, Megan		1401		No			0	0		V	E	1060-130
A C R	1110-237	Y	0	Skoman, Marsha	11/11/2004	1401		No		FTF	1	1		V	E	1110-237
A C R	1170-341		0	Li, Tong	08/16/2005	1402		No	Susp	TEL	0	1		V	E	1170-341
A C I N P R	1220-443		0	Pattullo, Genise	11/07/2005	1401		No		TEL	1	1		V Flagged	E	1220-443
A C R	1400-804		0	User 34, Test	02/08/2005	1401		No		FTF	1	0		V	E	1400-804
A C R	1501-004		0	User 44, Test	02/01/2005	1402		No		TEL	0	1		V	E	1501-004

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Fig. 28 Search Results: Sample Page

The column headings are listed at the top and the bottom of the page. If the heading is underlined, it can have the sort order changed by simply clicking on the heading. If you click once, the information is sorted in ascending order. Clicking again sorts it in descending order.

Navigating the Sample Page

At the left of the page, directly above the column headings, there is text that displays the range of sample lines you are viewing and the total number of samplelines returned from the search. This feature helps you keep track of where you are if there are multiple pages of samplelines.

WEBTRAK LOG-OUT 01. Select Project 02. Current Project 03. Search Results

Search Results : SurveyTrak Demo
 Select Project > Current Project > Search Results > Sample

Sample Addresses Interviewers Evaluations Verifications Criteria New Search

Displaying records 1 through 20 of 66 ← Navigational Tools → 1 2 3 4 Next >

Details	Sample ID	Ckd In	RC Ind	Interviewer	Result Date	Result	Wizard Action	IW Taped	IW Status	Last Call Mode	FTF Calls	TEL Calls	IW Length	Verification	Evaluation	Sample ID
A	R	1100-201	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-201
A	R	1100-202	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-202
A	R	1100-203	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-203
A	R	1100-204	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-204
A	R	1100-205	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-205
A	R	1100-206	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-206
A	R	1100-207	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-207
A	R	1100-208	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-208
A	R	1100-209	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-209
A	R	1100-210	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-210
A	R	1100-211	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-211
A	R	1100-212	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-212
A	R	1100-213	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-213
A	R	1100-214	Y	0	Baker, Jeannie	0000		No			0	0		V	E	1100-214

Fig. 29 Samplelines Displayed

On the upper right side of the page, there are hyperlinks for each page of results. Click on the hyperlink to go directly to the page of your choice. You may also click **Next** to be taken to the next page in the sequence.

The number of rows displayed can be changed via the Row Display link on the Current Project page.

No Samplelines Found

Sometimes there will not be any samplelines that fit the search criteria. If that happens, the following page will appear:

WEBTRAK LOG-OUT 01. Select Project 02. Current Project 03. Search Results

Search Results : SurveyTrak Demo
 Select Project > Current Project > Search Results > Sample

Sample Addresses Iwer Info Evaluation Verification Criteria New Search

Displaying records 0 of 0

No samplelines found. Please [check your search criteria](#).

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Fig. 30 No Samplelines

Check the search criteria by clicking on the hyperlink phrase **check your search criteria** to make sure something was not entered unintentionally. The display that appears gives you the same information you would have gotten if you clicked on the **Criteria** button on this page.

Columns on the Sample Page

The column headings that appear are project specific. Listed below are some of the common column headings found on the Sample page.

Details	Displays hyperlinks: A - Address information for all SurveyTrak address tabs C - Call records H - Transfer history L* - Letter request information - N - Case note information P* - Respondent payment information R* - Respondent profile T* - CaseTrak information 8 - 800 line call(s) received (Respondent Contact Logging System - RCLS) * Not all studies use these options
Sample ID	The sampleline ID
Chd In	Indicates if the line has been checked in when the column contains a "Y." If the line needs to be sent to the interviewer, please contact the Interviewer Help Desk.
RC Ind	Refusal conversion indicator
Interviewer	The name of the interviewer assigned to line
Result Date	The date of the last call record in the Call Wizard
Result	The result code of the last record in the Call Wizard
Wizard Action	Contains "Suspended" if the interviewer has not completed the entry of the Wizard Actions
IW Taped	Indicates if the interview was taped.
IW Status	Indicates if the interview is complete or suspended
Last Call Mode	Indicates the mode on the last call record in the Call Wizard
FTF Calls	Indicates the number of face to face call records
TEL Calls	Indicates the number of telephone call records
IW Length	Indicates the length of the interview
Verification	Indicates the verification status
Evaluation	Indicates the evaluation status

Sample Page Buttons

When the search results are returned, WebTrak has more functions available. The active button is dark blue instead of the light blue default color, which indicates the page currently being displayed. The following figure displays the Sample page and the button functions will be described below.

WEBTRAK LOG-OUT 01. Select Project 02. Current Project 03. Search Results

Search Results : SurveyTrak Demo
[Select Project](#) > [Current Project](#) > [Search Results](#) > [Sample](#) ← BACK

[Sample](#) [Addresses](#) [Interviewers](#) [Evaluations](#) [Verifications](#) [Criteria](#) [New Search](#)

Displaying records 1 through 8 of 8

Details	Sample ID	Ckd In	RC Ind	Interviewer	Result Date	Result	Wizard Action	IW Taped	IW Status	Last Call Mode	FTF Calls	TEL Calls	IW Length	Verification	Evaluation	Sample ID
A C N R	1040-082	Y	0	Pattullo, Genise	07/29/2004	1401		No	Susp	TEL	0	1		V	E	1040-082
A C H R	1040-085	Y	0	Li, Tong	09/09/2004	1401		No		TEL	0	1		V	E	1040-085
A C R	1060-130	Y	0	Turf, Megan		1401		No			0	0		V	E	1060-130
A C R	1110-237	Y	0	Skoman, Marsha	11/11/2004	1401		No		FTF	1	1		V	E	1110-237
A C R	1170-341		0	Li, Tong	08/16/2005	1402		No	Susp	TEL	0	1		V	E	1170-341
A C L N P R	1220-443		0	Pattullo, Genise	11/07/2005	1401		No		TEL	1	1		V Flagged	E	1220-443
A C R	1400-804		0	User 34, Test	02/08/2005	1401		No		FTF	1	0		V	E	1400-804
A C R	1501-004		0	User 44, Test	02/01/2005	1402		No		TEL	0	1		V	E	1501-004

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Fig. 31 Sample Page Buttons

Following are brief descriptions of the Sample Page buttons. More comprehensive descriptions can be found below.

- Sample** Default page when search results are returned.
- Addresses** Displays the respondent addresses for the samplelines of the current search. To view the other addresses from the SurveyTrak tabs, click the **A** link in the "Details" column.
- Interviewers** Displays the Interviewer's ID, name, TL, PM, address, phone, Last Send Date and status for all the interviewers who appear in the search. To view this information for all interviewers, click the hyperlink that says **View All Iwers**.
- Evaluations** Displays all evaluation information for interviewers. To view this info for all evals (if any), click the hyperlink that says **View All Evaluations**.
- Verifications** Displays verification information for each sample id. To view this info for all evals (if any), click the hyperlink that says **View All Verifications**.
- Criteria** This will display the selections made for the current search.
- New Search** Use to create a new search.

Addresses Page

The **Addresses** button displays the respondent address information by Sample ID. To see information from the second address tab, click on the hyperlink **A**.

WEBTRAK LOG-OUT 01. Select Project 02. Current Project 03. Search Results

Search Results : SurveyTrak Demo ← BACK

Select Project > Current Project > Search Results > Addresses

Sample Addresses Interviewers Evaluations Verifications Criteria New Search

answering machine Edit

Displaying records 1 through 8 of 8

Details	Sample ID	Iwer ID	Interviewer	Result	Title	Firstname	Lastname	Address1	Address2	City	State	Zip	Phone
A C N R	1040-082	98316575	Pattullo, Genise	1401	Ms	Marie	White	65481 Sheridan Ave. #A		Emerald City	MI	63106	
A C H R	1040-085	30537009	Li, Tong	1401	Ms	Jane	Swanson	2815 Oprah Ave.		Emerald City	MI	63106	
A C R	1060-130	71851664	Turf, Megan	1401	Ms	Harriet	Schneider	2583 Hampshire Avenue		Emerald City	MI	80287	
A C R	1110-237	43370107	Skoman, Marsha	1401	Mr	Kathy	Howe	43223 Bishop		Emerald City	NT	48219	
A C R	1170-341	30537009	Li, Tong	1402	Mr	Thomas	Crown	1254 Parker Ave		Emerald City	MI	63106	
A C L N P R	1220-443	98316575	Pattullo, Genise	1401	Mrs	Sally	Harper	456 Maple Lane		Emerald City	MI	63106	
A C R	1400-804	TU34	User 34, Test	1401	Mr	Scott	Smith	2811 Michigan Ave.		Emerald City	MI	63106	
A C R	1501-004	TU44	User 44, Test	1402	Mr	Scott	Smith	2811 Michigan Ave.		Emerald City	MI	63106	

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Fig. 32 Addresses Page

Interviewers Page

The button lists the interviewer id, name, TL, PM, address, last send date and status.

WEBTRAK LOG-OUT 01. Select Project 02. Current Project 03. Search Results

Search Results : SurveyTrak Demo ← BACK

Select Project > Current Project > Search Results > Iwer Info

Sample Addresses Interviewers Evaluations Verifications Criteria New Search

answering machine Edit

Displaying records 1 through 6 of 6 [View All Iwers](#)

Iwer ID	Last Name	First Name	TL	PM	Address1	Address2	City	State	Zip	Phone	Work Phone	Cell Phone	Last Send Date	Status
30537009	Li	Tong	Guyer, Heidi	Pattullo, Genise									02/06/2006	Active
98316575	Pattullo	Genise	Skoman, Marsha	Pattullo, Genise									02/06/2006	Active
43370107	Skoman	Marsha	Guyer, Heidi	Pattullo, Genise									02/06/2006	Active
71851664	Turf	Megan	Guyer, Heidi	Pattullo, Genise				MI					04/25/2005	Active
TU34	User 34	Test	Guyer, Heidi	Pattullo, Genise									11/01/2005	Inactive
TU44	User 44	Test	Guyer, Heidi	Pattullo, Genise									07/15/2005	Inactive

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Fig. 33 Interviewers Page

Evaluations Page

This page provides information on interviewer evaluations performed in WebTrak if required by the project.

WEBTRAK [LOG-OUT](#) 01. Select Project 02. Current Project 03. Search Results

Search Results : SurveyTrak Demo
[Select Project](#) > [Current Project](#) > Search Results > Evaluation [BACK](#)

[Sample](#) [Addresses](#) [Interviewers](#) [Evaluations](#) [Verifications](#) [Criteria](#) [New Search](#) [Completed iws](#) [Edit](#)

Displaying records 1 through 20 of 58 [View All Evaluations](#) 1 2 3 Next >

Details	Sample ID	Interviewer	TL	Result Date	Iw Taped	Eval Flag	Eval Date	Evaluator
A C P R	1000-001	Sykora, Richard	Skoman, Marsha	07/21/2004	No	E Sent	03/22/2005	User 32, Test
A C P R	1000-002	Sykora, Richard	Skoman, Marsha	07/21/2004	No	E Done	02/12/2005	Skoman, Marsha
A C P R	1000-003	Sykora, Richard	Skoman, Marsha	07/21/2004	No	E Sent	02/12/2005	Skoman, Marsha
A C R	1000-004	Sykora, Richard	Skoman, Marsha	07/21/2004	No	E Sent	03/29/2005	User 25, SRO Training
A C R	1000-005	Sykora, Richard	Skoman, Marsha	07/21/2004	No	E Sent	03/29/2005	User 21, SRO Training
A C R	1000-006	Sykora, Richard	Skoman, Marsha	07/21/2004	No	E Done	03/29/2005	User 34, Test
A C R	1000-007	Sykora, Richard	Skoman, Marsha	07/21/2004	No	E Done	03/03/2005	User 41, Test
A C R	1000-008	Sykora, Richard	Skoman, Marsha	07/21/2004	No	E Sent	08/02/2005	User 29, SRO Training
A C P R	1000-009	Sykora, Richard	Skoman, Marsha	07/23/2004	No	E Done	03/29/2005	User 48, Test
A C R	1000-010	Sykora, Richard	Skoman, Marsha	07/23/2004	No	E Sent	03/29/2005	User 27, SRO Training
A R	1000-017	Sykora, Richard	Skoman, Marsha		No	E Sent	03/29/2005	User 21, SRO Training
A R	1000-018	Sykora, Richard	Skoman, Marsha		No	E Sent	04/12/2005	Logan, Maudine
A C N P R	1010-021	Li, Tong	Guyer, Heidi	01/12/2005	Yes	E Sent	02/14/2005	Skoman, Marsha

Fig. 34 Evaluations Page

Verifications Page

The Verifications page provides information on interview verifications performed in WebTrak if required by the project.

WEBTRAK [LOG-OUT](#) 01. Select Project 02. Current Project 03. Search Results

Search Results : SurveyTrak Demo
[Select Project](#) > [Current Project](#) > Search Results > Verification [BACK](#)

[Sample](#) [Addresses](#) [Interviewers](#) [Evaluations](#) [Verifications](#) [Criteria](#) [New Search](#) [Completed iws](#) [Edit](#)

Displaying records 1 through 20 of 28 [View All Verifications](#) 1 2 Next >

Details	Sample ID	Interviewer	TL	Result Date	Iw Taped	Ver Flag	Ver Date	Verifier
A C P R	1000-001	Sykora, Richard	Skoman, Marsha	07/21/2004	No	V Failed	03/22/2005	User 41, Test
A C P R	1000-002	Sykora, Richard	Skoman, Marsha	07/21/2004	No	V Failed	02/21/2005	Benson, Grant
A C P R	1000-003	Sykora, Richard	Skoman, Marsha	07/21/2004	No	V OK	02/12/2005	Skoman, Marsha
A C R	1000-004	Sykora, Richard	Skoman, Marsha	07/21/2004	No	V OK	03/29/2005	User 38, Test
A C R	1000-005	Sykora, Richard	Skoman, Marsha	07/21/2004	No	V OK	03/29/2005	User 29, SRO Training
A C R	1000-006	Sykora, Richard	Skoman, Marsha	07/21/2004	No	V OK	03/29/2005	Turf, Megan
A C R	1000-007	Sykora, Richard	Skoman, Marsha	07/21/2004	No	V OK	03/29/2005	User 47, Test
A C R	1000-008	Sykora, Richard	Skoman, Marsha	07/21/2004	No	V OK	03/29/2005	User 44, Test
A C P R	1000-009	Sykora, Richard	Skoman, Marsha	07/23/2004	No	V OK	03/29/2005	User 48, Test
A C R	1000-010	Sykora, Richard	Skoman, Marsha	07/23/2004	No	V OK	03/29/2005	User 27, SRO Training
A C P R	1000-011	Sykora, Richard	Skoman, Marsha	07/23/2004	No	V OK	03/29/2005	User 29, SRO Training
A C R	1000-012	Sykora, Richard	Skoman, Marsha	07/23/2004	No	V OK	08/02/2005	User 29, SRO Training

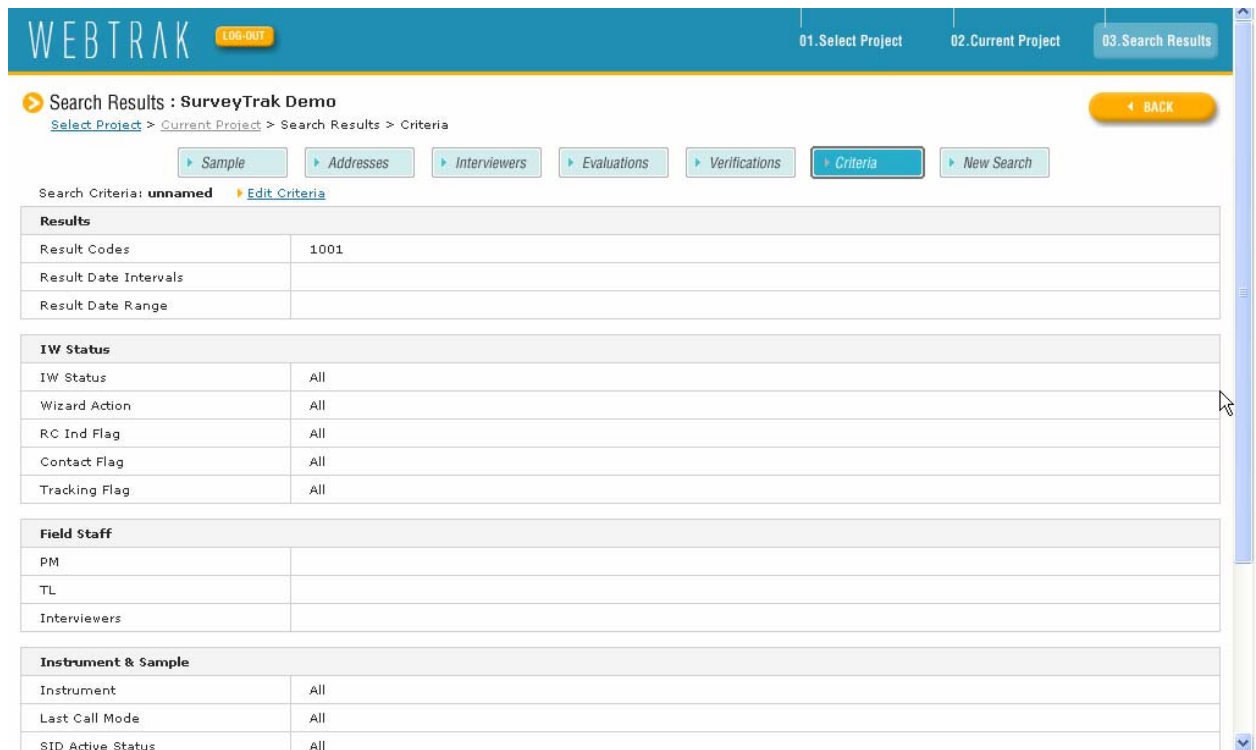
Fig. 35 Verifications Page

Criteria Page

The Criteria page can be accessed in several ways:

- Selecting the **Criteria** hyperlink for an existing search on the Current Project page.
- Selecting the **Criteria** button on the Sample page after a search is performed.
- Selecting the **check your search criteria** hyperlink when the message “No samplelines found” displays.

The same information displays no matter how it is accessed. This page is for display purposes only. If values in the search need to be changed, click the **Edit Criteria** hyperlink. Headings on the Criteria page match the search tabs.



The screenshot displays the WebTrak interface for the 'Criteria' page. At the top, there is a blue navigation bar with the 'WEBTRAK' logo, a 'LOG-OUT' button, and three tabs: '01. Select Project', '02. Current Project', and '03. Search Results'. Below the navigation bar, the page title is 'Search Results : SurveyTrak Demo' with a 'BACK' button. A breadcrumb trail reads 'Select Project > Current Project > Search Results > Criteria'. A row of search tabs includes 'Sample', 'Addresses', 'Interviewers', 'Evaluations', 'Verifications', 'Criteria' (which is highlighted), and 'New Search'. Below the tabs, the search criteria are listed as 'unnamed' with an 'Edit Criteria' link. The main content area contains four tables:

Results	
Result Codes	1001
Result Date Intervals	
Result Date Range	

IW Status	
IW Status	All
Wizard Action	All
RC Ind Flag	All
Contact Flag	All
Tracking Flag	All

Field Staff	
PM	
TL	
Interviewers	

Instrument & Sample	
Instrument	All
Last Call Mode	All
SID Active Status	All

Fig. 36 Criteria Page

New Search Page

Clicking the **New Search** button on the Sample page returns you to the New Search page where you are able to define criteria for a new search.

Search Examples

The following are step-by-step instructions for creating some common searches in WebTrak. The more you use WebTrak, the better you will become. **Note:** *Depending on who is assigned to the project, the people listed below may not be included. Select other people for the search examples. Additionally, some criteria listed below may not be available for all projects.*

Find all the interviews that have been completed.

Click on the **New Search** button
In the field "Name of Search" type "**Completed Interviews**"
On the **Results** tab, under "Result" box, click on "1001"
Click on **Search + Save**

Find all the interviews that have been completed for two interviewers.

Click on the **New Search** button
In the field "Name of Search" type "**Test2**"
Click on the **Field Staff** tab
Under the "Interviewers" column, click on a name.
Hold down the <**Ctrl**> key and at the same time click on another name.
Click on the **Results** tab
Under Result box click on "1001"
Click on **Search + Save**

Find all the interviews that have Contact Result Code.

Click on the **New Search** button
In the field "Name of Search" type "Test3"
On the **Results** tab, select the result code "4001"
Hold down the <**Shift**> key and at the same time click on "4204"
Click on **Search + Save**

Find all the interviews that have a tracking result code and for interviewer Genise Pattullo.

Click on the **New Search** button
In the field "Name of Search" type "Test4"
On the **Results** tab, select the result code "4510"
Click on the tab **Field Staff**
Under Interviewers box click on "Pattullo, Genise"
Click on **Search + Save**

Find all the interviews that have been flagged for verification for a team leader.

Click on the **New Search** button
In the field "Name of Search" type "TL Verification"
Click on the **Field Staff** tab
Under the "TL" column click on a name
Click on the Verification & Evaluation tab
Under verification box click on "1 – Flagged"
Click on **Search + Save**

Find all the interviews that are flagged for verification that have a NS Result Code.

Click on the **New Search** button
In the field "Name of Search" type "NER Verif"
On the **Results** tab, select the result code "7001"
Hold down the <**Shift**> key and at the same time click on "8011"
Click on the **Verification & Evaluation** tab
Under verification box click on "1 – Flagged"
Click on **Search + Save**