

queXS reports

Sample Report/ Quota Screen Snapshot

The Sample Report/Quota Screen Snapshot is available in the queXS administration menu under "quota report"

The screenshot shows a web browser window with the URL <http://localhost/dev/mcmasterreports/admin/>. The browser's address bar also lists other sites like ACTIVE, asterisk, ddidr, Groklaw, ISS, BBC, LG, LWN, queXML, Wiki, Work, FSM, LT, and HaD. The main content area displays a list of administrative tasks under the heading "Select a questionnaire from the list below".

- Questionnaire creation and management**
 - [Create a new questionnaire](#)
 - [Administer questionnaires with Limesurvey](#)
 - [Import a sample file \(in CSV form\)](#)
 - [Assign samples to questionnaires](#)
 - [Set values in questionnaire to pre fill](#)
 - [Quota management](#)
 - [Quota row management](#)
 - [**Quota report**](#)
 - [Add operators to the system](#)
 - [Assign operators to questionnaires](#)
 - [Modify operator skills](#)
 - [Shift management \(add/remove\)](#)
 - [Data output](#)
- Questionnaire progress**
 - [Display all future appointments](#)
 - [Sample call attempts report](#)
 - [Questionnaire outcomes](#)
- Performance**
 - [Operator performance](#)
- Client management**
 - [Add clients to the system](#)

At the bottom of the page, there is a JavaScript link: `javascript:link('mainobj','quotareport.php');` and a status bar indicating "0 errors / 0 warnings".

Select a questionnaire, then the sample file to display the report.

An example report is displayed below:

Strata	Status	Quota	Sample	Sample Used	Sample Remaining	Completions	% Complete
Total sample		4	4	4	0	2	50
Value like Adam	open		4	4	0	2	
Number with brackets	open		1	1	0	1	
TestQuota2asd		1				0	0
temp		2				2	100

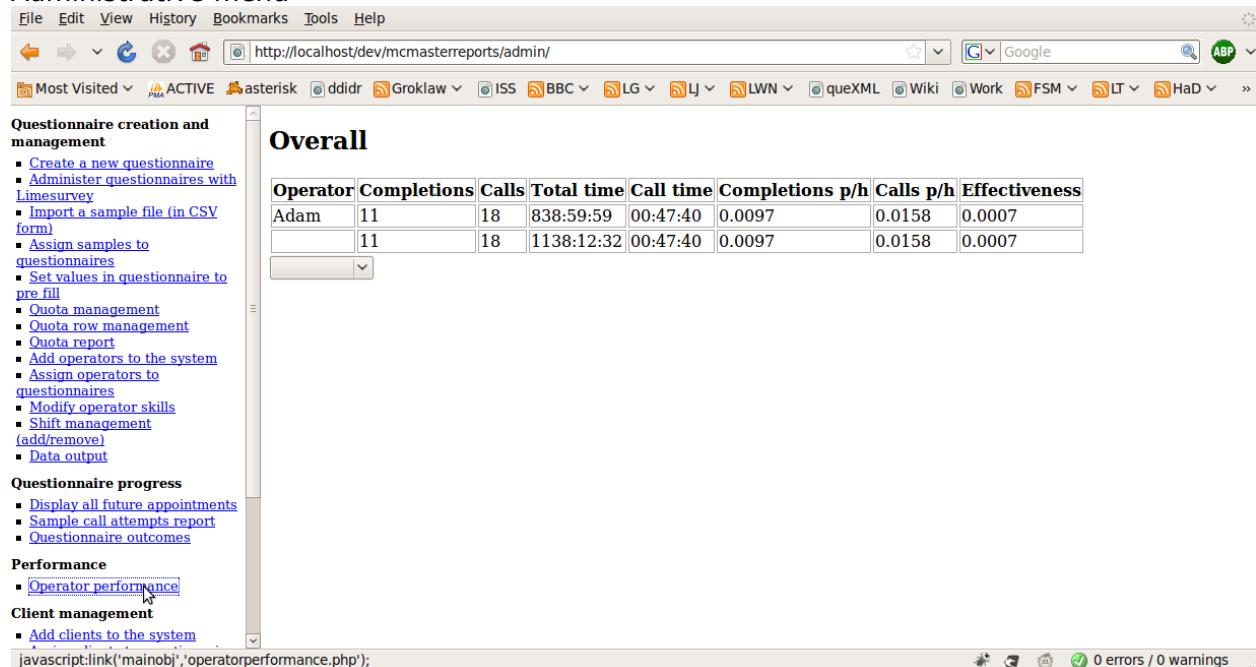
The report contains the following columns:

1. Strata
 - The strata is a "piece" of a sample.
 - The first strata displayed in the report is always the entire sample (Total sample)
 - Next, "quota row" strata are displayed (strata defined under "quota row management" in the administrative menu)
 - Next, "replicate" strata are displayed (strata defined under "quota row management" in the administrative menu, that do not automatically exclude sample records based on completed questionnaires)
 - Finally, "questionnaire" strata are displayed (strata defined inside limesurvey which are based on collected data (eg: Gender))
2. Status
 - The status of a particular strata row is either "open" or "closed"
 - "open" strata are sample records, or questionnaires available to interviewers.
 - "closed" strata records are not available to call or continue in a questionnaire
 - If a strata is not complete (reached the number of completions required to close it automatically) then by clicking on this status link, it is possible to manually open and close a strata
 - Note: if you manually close a strata, it will not automatically open again
3. Quota
 - This is the number of completions defined by the operator for the system to automatically allow to complete
 - Once this number of completions is reached, the system will automatically set the Status of the strata to "closed"
4. Sample
 - This is the number of sample records which match the quota criteria
5. Sample used

- The number of sample records which match the quota criteria, and that have been assigned to a case
6. Sample remaining
- The number of sample records which match the quota criteria, and have not been assigned to a case
7. Completions
- The number of sample records which match the quota criteria, that have been completed
8. % Complete
- The percentage complete of the quota: (completions/quota) * 100

Productivity report

The productivity report is available under "Operator performance" in the queXS Administrative menu



The screenshot shows a web browser window with the URL <http://localhost/dev/mcmasterreports/admin/>. The page title is "Overall". On the left, there is a sidebar with navigation links for "Questionnaire creation and management", "Questionnaire progress", "Performance", and "Client management". Under "Performance", the link "Operator performance" is highlighted. The main content area displays a table titled "Overall" with the following data:

Operator	Completions	Calls	Total time	Call time	Completions p/h	Calls p/h	Effectiveness
Adam	11	18	838:59:59	00:47:40	0.0097	0.0158	0.0007
	11	18	1138:12:32	00:47:40	0.0097	0.0158	0.0007

At the bottom of the page, there is a status bar with the message "javascript:link('mainobj','operatorperformance.php');".

This report can be broken down by project (questionnaire) and shift

File Edit View History Bookmarks Tools Help

http://localhost/dev/mcmasterreports/admin/

Most Visited ▾ ACTIVE asterisk ddldr Groklaw ISS BBC LG LWN queXML Wiki Work FSM LT HaD ▾

Questionnaire creation and management

- Create a new questionnaire
- Administer questionnaires with Limesurvey
- Import a sample file (in CSV form)
- Assign samples to questionnaires
- Set values in questionnaire to pre fill
- Quota management
- Quota row management
- Quota report
- Add operators to the system
- Assign operators to questionnaires
- Modify operator skills
- Shift management (add/remove)
- Data output

Questionnaire progress

- Display all future appointments
- Sample call attempts report
- Questionnaire outcomes

Performance

- Operator performance

Client management

- Add clients to the system

Done

Overall

Operator	Completions	Calls	Total time	Call time	Completions p/h	Calls p/h	Effectiveness
Adam	11	18	838:59:59	00:47:40	0.0097	0.0158	0.0007
	11	18	1138:25:52	00:47:40	0.0097	0.0158	0.0007
tt4							

This project

Operator	Completions	Calls	Total time	Call time	Completions p/h	Calls p/h	Effectiveness
Adam	6	11	08:08:26	00:34:01	0.7371	1.3513	0.0696
	6	11	08:08:26	00:34:01	0.7371	1.3513	0.0696
Wed 02 Sep 09:00AM till 08:30PM							

This shift

Operator	Completions	Calls	Total time	Call time	Completions p/h	Calls p/h	Effectiveness
Adam	3	7	07:56:08	00:22:28	0.3780	0.8821	0.0472
	3	7	07:56:08	00:22:28	0.378	0.8821	0.0472

0 errors / 0 warnings

The productivity report contains the following columns:

1. Operator
 - The operator (interviewer)
2. Completions
 - The number of completions
3. Calls
 - The total number of calls made
4. Total time
 - The entire time assigned to a case (total working time)
5. Call time
 - The amount of time on an active call
6. Completions p/h
 - The number of completions per hour of total working time
7. Calls p/h
 - The number of calls made per hour of total working time
8. Effectiveness
 - The proportion of time spent on calls versus total working time

Disposition report

The disposition report is available under the queXS administration screen under "Questionnaire outcomes"

File Edit View History Bookmarks Tools Help

http://localhost/dev/mcmasterreports/admin/

Most Visited ACTIVE asterisk ddidr Groklaw ISS BBC LG LWN queXML Wiki Work FSM LT HaD

Select a questionnaire from the list below

Questionnaire creation and management

- Create a new questionnaire
- Administer questionnaires with Limesurvey
- Import a sample file (in CSV form)
- Assign samples to questionnaires
- Set values in questionnaire to pre fill
- Quota management
- Quota row management
- Quota report
- Add operators to the system
- Assign operators to questionnaires
- Modify operator skills
- Shift management (add/remove)
- Data output

Questionnaire progress

- Display all future appointments
- Sample call attempts report
- **Questionnaire outcomes**

Performance

- Operator performance

Client management

- Add clients to the system

javascript:link('mainobj','outcomes.php');

0 errors / 0 warnings

Selecting a questionnaire will list the disposition report

File Edit View History Bookmarks Tools Help

http://localhost/dev/mcmasterreports/admin/

Most Visited ACTIVE asterisk ddidr Groklaw ISS BBC LG LWN queXML Wiki Work FSM LT HaD

Select a questionnaire from the list below

tt6

Outcomes

Sample status

Status	Number
Drawn from sample	4

Average time on a completed questionnaire: 0 Min 13 Secs

Outcome	Rate
Response Rate 1	0.67
Refusal Rate 1	0
Cooperation Rate 1	1
Contact Rate 1	0.67

Outcome	Count	%
Not attempted or worked	1	25.00
Complete	2	50.00
Quota filled	1	25.00
	4	100

Done

0 errors / 0 warnings

The report can be further broken down by operator or sample, then by shift

The screenshot shows a web-based administrative interface for managing questionnaires. On the left, a sidebar lists various management tasks under categories like 'Questionnaire creation and management', 'Questionnaire progress', 'Performance', and 'Client management'. The main content area displays disposition statistics:

- Outcome** table:

Outcome	Rate
Response Rate 1	0.67
Refusal Rate 1	0
Cooperation Rate 1	1
Contact Rate 1	0.67
- Sample** table:

Outcome	Count	%
Not attempted or worked	1	25.00
Complete	2	50.00
Quota filled	1	25.00
	4	100
- Operator:** A dropdown menu.
- Shifts:** A dropdown menu.

At the bottom right, there are status indicators: 0 errors / 0 warnings.

The disposition report displays:

1. Sample status
 - The number of records drawn from the sample (assigned to a case)
 - The number of records that remain in the sample
2. Average time on a completed questionnaire
3. AAPOR Outcome codes
 - These are calculated using [AAPOR Standard definitions \(see the report here\)](#)
4. Outcome codes
 - These codes are based on the AAPOR Standard definitions: Final Disposition Codes for RDD Telephone Surveys (See page 46 of the [AAPOR Standard definitions report](#))
 - The last row in this table is a total

Sample call attempts report

This report is available under "sample call attempts report" in the queXS administrative menu

File Edit View History Bookmarks Tools Help

http://localhost/dev/mcmasterreports/admin/

Most Visited ACTIVE asterisk ddidr Grokaw ISS BBC LG LJ LWN queXML Wiki Work FSM LT HaD

Questionnaire creation and management

- Create a new questionnaire
- Administer questionnaires with Limesurvey
- Import a sample file (in CSV form)
- Assign samples to questionnaires
- Set values in questionnaire to pre fill
- Quota management
- Quota row management
- Quota report
- Add operators to the system
- Assign operators to questionnaires
- Modify operator skills
- Shift management (add/remove)
- Data output

Questionnaire progress

- Display all future appointments
- Sample call attempts report
- Questionnaire outcomes

Performance

- Operator performance

Client management

- Add clients to the system

javascript:link('mainobj','samplecallattempts.php');

0 errors / 0 warnings

This report can be broken down by project (questionnaire), sample and then quota

File Edit View History Bookmarks Tools Help

http://localhost/dev/mcmasterreports/admin/

Most Visited ACTIVE asterisk ddidr Grokaw ISS BBC LG LJ LWN queXML Wiki Work FSM LT HaD

Questionnaire creation and management

- Create a new questionnaire
- Administer questionnaires with Limesurvey
- Import a sample file (in CSV form)
- Assign samples to questionnaires
- Set values in questionnaire to pre fill
- Quota management
- Quota row management
- Quota report
- Add operators to the system
- Assign operators to questionnaires
- Modify operator skills
- Shift management (add/remove)
- Data output

Questionnaire progress

- Display all future appointments
- Sample call attempts report
- Questionnaire outcomes

Performance

- Operator performance

Client management

- Add clients to the system

1: Test sample

This project

Number of cases	Call attempts made
3	1
1	2
4	

4: Number with brackets

This sample

Number of cases	Call attempts made
3	1
1	2
4	

This quota

Number of cases	Call attempts made
1	1
1	

Done

0 errors / 0 warnings

This report contains the number of call attempts made, and the number of cases that fall into that category.

For example, the first row contains how many cases have had 1 call attempt made, the second row contains the number of cases where 2 calls attempts were made, and so on. The last row always contains the total number of cases in that category (eg that sample, or that quota)

queXS quota's and their relation to reports

There are 4 types of quota's in queXS - although only 3 of them apply to these reports. The type of quota to ignore is listed under "Quota Management" in the queXS administration screen. This quota is ignored as it excludes an entire sample file - this is not appropriate given the specifications for these modifications.

Therefore the 3 quota types that relate to the reports above are:

1. Monitor outcomes of questions in completed questionnaires, and exclude selected sample records when completion limit is reached (Standard Quota Row)
2. Exclude selected sample records (Replicate)
3. Monitor outcomes of questions in completed questionnaires, and abort interview when completion limit is reached (Questionnaire)

1 - Standard Quota Row

This quota is used to exclude records from the sample (eg a province) based on data collected in the questionnaire (eg What province do you live in?). This quota is used where there is information in the sample to allow certain records to be excluded.

To create a quota row, click on "Quota row management" in the administration screen

The screenshot shows a web browser window with a navigation bar at the top containing links like 'File', 'Edit', 'View', 'History', 'Bookmarks', 'Tools', and 'Help'. The address bar shows the URL 'http://localhost/dev/mcmasterreports/admin/'. Below the address bar is a toolbar with various icons. The main content area has a title 'Select a questionnaire from the list below'. To the left is a sidebar with a tree view of administrative options. The 'Quota management' section is expanded, showing 'Quota row management' as the selected item. Other items in this section include 'Quota report', 'Add operators to the system', 'Assign operators to questionnaires', 'Modify operator skills', 'Shift management (add/remove)', and 'Data output'. Other sections visible in the sidebar include 'Questionnaire creation and management', 'Questionnaire progress', 'Performance', and 'Client management'. At the bottom of the page, there is a status bar with the text 'javascript:link("mainobj","quotarow.php");' and a message '0 errors / 0 warnings'.

Then select the question in the questionnaire that the quota applies to

File Edit View History Bookmarks Tools Help

http://localhost/dev/mcmasterreports/admin/

Most Visited ACTIVE asterisk ddir Grokaw ISS BBC LG LJ LWN queXML Wiki Work FSM LT HaD

Select a questionnaire from the list below

tt6

Select a sample from the list below

Test sample

Current row quotas (click to delete)

Replicate: Where name like Adam - Row quota not yet reached (Open)
 Replicate: Where number like (03) 9876 5432 - Row quota not yet reached (Open)

Select a question for the row quota

No question (Replicate)

Test question 1:
 Test question 2:
 Test 3:
 YEstno:
 adfasdfasd:

0 errors / 0 warnings

Then supply the parameters

File Edit View History Bookmarks Tools Help

http://localhost/dev/mcmasterreports/admin/

Most Visited ACTIVE asterisk ddir Grokaw ISS BBC LG LJ LWN queXML Wiki Work FSM LT HaD

Select a question for the row quota

Test question 1:

Select the sample variable to exclude

name

Enter the details for creating the row quota:

Pre defined values for this question:

No labels defined for this question

Describe this quota
 The code value to compare
 The type of comparison
 The number of completions to stop calling at
 Exclude from the sample where the value is like

0 errors / 0 warnings

1. Description
2. Code value to compare to
 - The value to compare against the data collected in the questionnaire
3. Type of comparison
 - The comparison operator
4. Number of completions
 - This is the quota size
5. Exclude from sample where the value is like

- The value to compare against in the sample file to exclude matching rows

2 - Replicate

This quota is used to manually exclude records from the sample. The administrator will use the open and close links in the quota report screen to exclude or allow sample records.

To create a replicate, click on "Quota row management" in the administration screen

File Edit View Bookmarks Tools Help

http://localhost/dev/mcmasterreports/admin/

Most Visited ▾ ACTIVE asterisk ddidr Groklaw ▾ ISS BBC ▾ LG ▾ LJ ▾ LWN ▾ queXML Wiki Work FSM ▾ LT ▾ HaD ▾ >

ABP ▾

Select a questionnaire from the list below

Questionnaire creation and management

- Create a new questionnaire
- Administer questionnaires with Limesurvey
- Import a sample file (in CSV form)
- Assign samples to questionnaires
- Set values in questionnaire to pre fill
- Quota management
- Quota row management **Quota row management**
- Quota report
- Add operators to the system
- Assign operators to questionnaires
- Modify operator skills
- Shift management (add/remove)
- Data output

Questionnaire progress

- Display all future appointments
- Sample call attempts report
- Questionnaire outcomes

Performance

- Operator performance

Client management

- Add clients to the system

javascript:link('mainobj','quotarow.php');

0 errors / 0 warnings

Then select "No question (Replicate)"

File Edit View History Bookmarks Tools Help

http://localhost/dev/mcmasterreports/admin/

Most Visited ACTIVE asterisk ddidr Grokaw ISS BBC LG LJ LWN queXML Wiki Work FSM LT HaD

Select a questionnaire from the list below

tt6

Select a sample from the list below

Test sample

Current row quotas (click to delete)

Replicate: Where name like Adam - Row quota not yet reached (Open)
 Replicate: Where number like (03) 9876 5432 - Row quota not yet reached (Open)

Select a question for the row quota

No question (Replicate)

Test question 1:
 Test question 2:
 Test 3:
 YEstno:
 adfasdfasd:

0 errors / 0 warnings

Then supply the parameters

File Edit View History Bookmarks Tools Help

http://localhost/dev/mcmasterreports/admin/

Most Visited ACTIVE asterisk ddidr Grokaw ISS BBC LG LJ LWN queXML Wiki Work FSM LT HaD

Select a question for the row quota

No question (Replicate)

Select the sample variable to exclude

name

Enter the details for creating the row quota:

Pre defined values for this question:

No labels defined for this question

Describe this quota

Exclude from the sample where the value is like

Add row quota

0 errors / 0 warnings

1. Description
2. Exclude from the sample where the value is like
 - The value to compare against in the sample file to exclude matching rows

3 - Questionnaire

This quota will abort an interview based on data collected in the questionnaire (sometimes referred to as a screener question). An example would be a quota on gender. A message will be displayed to the interviewer to read to the respondent, and the outcome for the case will be set to: "Quota filled".

To add a questionnaire quota, we use limesurvey. Firstly, select "Administer questionnaires with limesurvey"

The screenshot shows a web browser window with the LimeSurvey administration interface. The URL is <http://localhost/dev/mcmasterreports/admin/>. The left sidebar contains a navigation menu with sections like 'Questionnaire creation and management', 'Questionnaire progress', 'Performance', and 'Client management'. Under 'Questionnaire creation and management', the 'Administer questionnaires with Limesurvey' link is highlighted. The main content area displays a 'Logging in...' message: 'Welcome azammit' and 'You logged in successfully.' Below this, there's a 'LimeSurvey Version 1.85+ (7523)' notice and a 'Like it? Donate to LimeSurvey' button. At the bottom right of the main area, there are status icons for errors and warnings, showing '0 errors / 0 warnings'.

Choose the questionnaire, then select "Set survey quotas" (A pie icon)

The screenshot shows the LimeSurvey administration interface. On the left, a sidebar lists various management options like 'Questionnaire creation and management', 'Questionnaire progress', 'Performance', and 'Client management'. The main panel displays survey details for 'Survey tt4 (ID: 99152)'. Key information includes:

- Title:** tt4 (ID 99152)
- Survey URL (English):** http://localhost/dev/mcmasterreports/include/limesurvey/index.php?sid=99152&lang=en
- Description:** tt4
- Welcome:** (empty)
- Administrator:** ()
- Fax to:** -
- Start date:** -
- Expiry date:** -
- Template:** quexs
- Base language:** English - English
- Additional languages:** (empty)
- Exit link:** http://localhost/dev/quexslime185/rs_project_end.php
- Number of questions/groups:** 5/1
- Survey currently active:** Yes
- Survey table name:** lime_survey_99152
- Hints:** This survey is NOT anonymous.

At the bottom right, there are status indicators: 0 errors / 0 warnings.

Then choose "add new quota"

The screenshot shows the LimeSurvey administration interface with the 'Survey quotas' section selected. The table header is:

Survey quotas					
Quota name	Status	Quota action	Limit	Completed	Action

The body of the table shows:

		No quotas have been set for this survey.	0	0	Add new quota
			0	0	Quick CSV Report

At the bottom right, there are status indicators: 0 errors / 0 warnings.

Enter the description for the quota, the number of completions, and a message to display to the interviewer when the quota is full, then click on "add quota"

LimeSurvey

New quota

Quota name: Name

Quota limit: 10

Quota message: Sorry your responses have exceeded a quota on this survey.

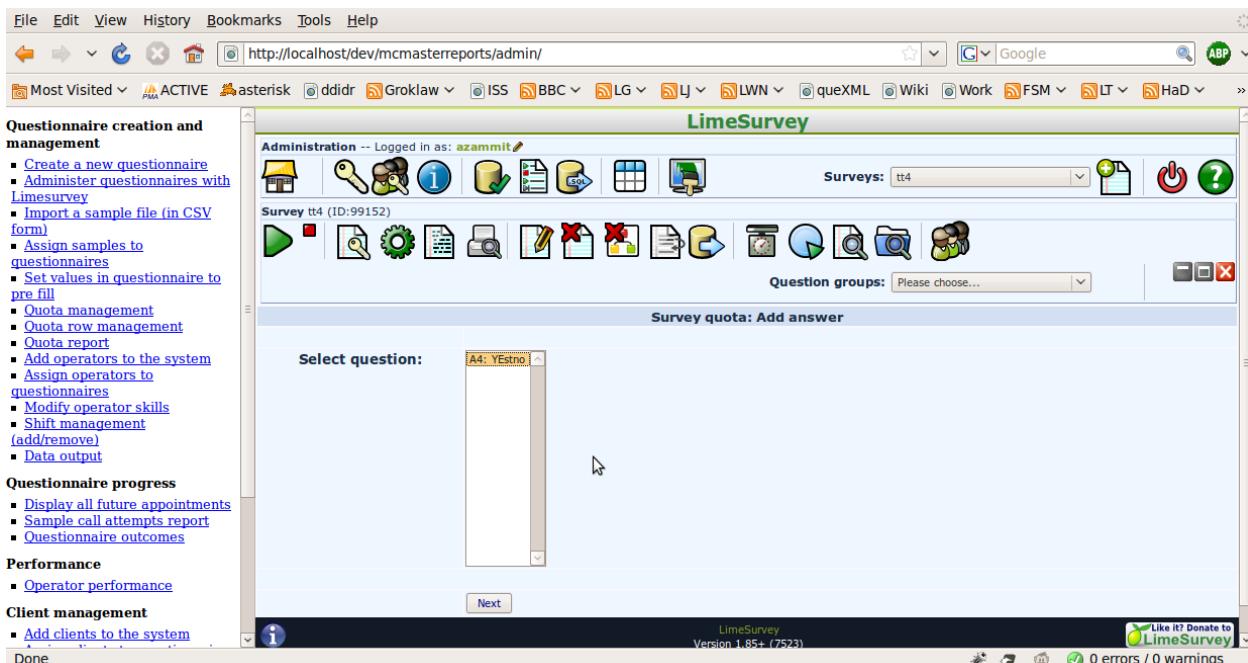
Add new quota

Now you must add "answers" to the quota to define which questions apply to the quota.
Click on "add answer"

Quota name	Status	Quota action	Limit	Completed	Action
Name	Active	Terminate survey	10	N/A	Modify Remove
	Questions	Answers	10		Add answer Add new quota Quick CSV Report
			10	0	

Select the question that will apply to the quota (Not all question type are available, see the [limesurvey documentation](#) for further information) and click next

Screenshot of the LimeSurvey administration interface showing the 'Survey quota: Add answer' screen. The left sidebar contains navigation links for questionnaire creation, management, progress, performance, and client management. The main panel shows a list of questions under 'Survey tt4 (ID: 99152)'. A dropdown menu 'Select question:' is open, showing 'A4: YEstno'.



Then select the response that will apply, and click next to complete creating the questionnaire quota

Screenshot of the LimeSurvey administration interface showing the 'Survey quota: Add answer' screen. The left sidebar contains navigation links for questionnaire creation, management, progress, performance, and client management. The main panel shows a list of questions under 'Survey tt4 (ID: 99152)'. A dropdown menu 'Select answer:' is open, showing 'Yes' and 'No'.

