

**Blaise**





# CMA – CMA Admin tool – CPI

Pre-conference training, October 23, 2023

# Overview of CMA / CMA Admin tool / CPI training

During this session, we will look in depth into the functionality and features of the Case Management Application, the CMA Admin tool and the Consumer Price Index (CPI) Application, which Team Blaise has developed.

Subjects you will learn more about during the session are:

- Compiling sources and deployment of CMA, CMA Admin tool and best practices to follow.
- CMA features/concepts. Some topics covered will be:
  - data models and settings in use by CMA and their purpose.
  - how does the CMA synchronization of cases between the interviewer's device and Blaise server work?
  - various demos of CMA features like conducting interviews, adding attempts, viewing of logs, spawning and syncing of cases.
- CMA Admin tool features/concepts. Some topics covered will be:
  - data models and settings in use by CMA Admin tool and their purpose.
  - defined user roles and their responsibilities within the CMA Admin tool application.
  - various demos of Admin tool features, like management of interviewers and supervisors, assigning cases, transferring cases, applying instructions to cases, and monitoring progress.
- CPI App features/concepts. Some topics covered will be:
  - data models and settings in use by the CPI App and their purpose.
  - steps to be taken in order to install the CPI App.
  - demo of the CPI App in action.



# CMA - History

Development started in 2019

- CMA 1.0 – Shipped with Blaise 5.8.2, July 2020
- CMA 1.5 – Shipped with Blaise 5.9.6 & 5.10.0, June 2021
- CMA 2.0 – Shipped with Blaise 5.11, December 2021
- CMA 2.5 – Shipped with Blaise 5.12, June 2022
- CMA 2.6 – Shipped with Blaise 5.13, December 2022

The original CMA 1.0 design / architecture has been extended to get to CMA 1.5 and later



# Current versions

- CMA 2.605. Shipped with
  - Blaise 5.12.14.3290 (2023 October 12 Bug Fix Version 13) and
  - Blaise 5.13.9.3463 (2023 October 12 Bug Fix Version 8)
- CMA Admin tool 2.11. Shipped with
  - Blaise 5.13.9.3463 (2023 October 12 Bug Fix Version 8)

CPI application not yet shipped. Will probably be part of 5.14



# CMA 2.0 presentations in 2022

- Early last year we did some online presentations on CMA 2.0
  - Slides and more than 5 and ½ hours of recordings are available on Internet



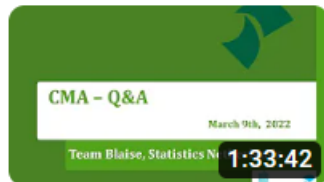
## CMA Workshop - January 27, 2022

CBS's Blaise • 84 views • 1 year ago



## Inside CMA Workshop - February 9, 2022

CBS's Blaise • 33 views • 1 year ago



## CMA Q&A session - March 7, 2022

CBS's Blaise • 41 views • 1 year ago



# CMA

## The basics of CMA



# CMA – Case Management Application

- CMA is an *application* to help *interviewers* to manage *cases* for one or more *surveys* on a *device*
- Created in Manipula Dialogs, source code is shipped as a ‘sample’ in <Documents>\Blaise5\Samples\Case Management\CMA
  - So it is possible to inspect the sources and change them if you want...
- Technical documentation is present in that folder; CMA\_Version2x.pdf





# CMA – Some design principles

- It should be *survey agnostic*
  - CMA has no knowledge of the datamodel of the survey
- It should be *result agnostic*
  - CMA only registers/displays the result/outcome code, it does not use them anywhere
- *As few statuses as possible*
  - Ultimately CMA only knows whether a case is handled or not
- *Automate* what can be automated
  - E.g. automatic (de-)installation of surveys
- *Configurable* by using setting files and CMA specific data models



# CMA – Application

- CMA will download, install, update, and uninstall topic surveys
- Contains many settings – can be customize to your business requirements
  - Capability to enable/disable nearly every feature
- Runs in DepApp, Android app (Google play store) and iOS-app (app store)
- CMA can function when an interviewer is offline and upload any changes when a connection is established



# CMA - Basics

- Interviewer receives assignments (cases)
  - *Cases database*
- For each case the interviewer needs to know where to conduct the interview
  - *Contact data* (no database...)
- Interviewer needs to be able to register what happened
  - *Attempts*
    - Automatically
    - Manually



# CMA – Cases database

- CMA is based on a centralized database with *cases*
  - *Centralized* means: installed on a server that is accessible through the internet
- Each *case* in the database is for a specific *survey*
  - A *survey* is a Blaise data model package installed on a server. Also called *Topic instrument*
- Each *case* can be assigned to a specific *user*
  - A *user* is defined in the server manager
  - By using a download interceptor the right assignments are selected
- The centralized database is called the ***launcher*** database
- The advices is not to modify the definition of that database
  - There is no need to...
  - But if you want you can...



# CMA – Demo

- I will walk you through the examples that are shipped with Blaise 5 and explain/show how CMA works
- I will use CMA Admin tool during the demo
  - Used to handle transfer of cases and management of interviewers
  - Also run with the DepApp
  - Online – unlike CMA you must have a live connection to the server



# CMA Admin tool – User definition

- In the world of CMA admin tool there are 4 different kind of users:
  - Interviewer – someone that will be using CMA
  - Supervisor – someone who manages the work of one or more interviewers
  - Manager – someone who manages one or more supervisors
  - Administrator – someone with administrative tasks for the admin tool



# CMA Admin tool - Roles

- There are 3 different roles
  - Supervisor – assign, transfer, reopen, release cases
  - Manager – import cases, perform consistency checks, assign cases to supervisor, view interview
  - Administrator – create users and manage access to surveys
- An interviewer can only have one supervisor and a supervisor can only have one manager
- A supervisor can also be allowed to act as manager
- A manager can also be allowed to act as administrator



Feel free to ask questions and please do!





# Some additional CMA survey examples

- Visitors Survey (a.k.a. Exit Survey)
  - Conducted on some of the Dutch Caribbean Islands
  - Is an example of spawning new cases using a donor case
- Institutions Survey
  - Conducted as part of the Cyprus 2021 population census
  - Is an example of spawning and grouping and of transferring data between CMA and instrument (in both directions)
- CPI application
  - Manipula Dialog based survey
  - Will be discussed later during this session



# CMA synchronization only

- NatCen (UK) is / will only be using the synchronization part of CMA
- They opted to extend their existing interviewer laptop case management to allow for Blaise 5 surveys by using CMA synchronization
- Blaise 5 surveys are downloaded and installed by CMA
- New assignments are handled through launcher database
  - This results in updates on tables in the local Access database
  - To enable this CMA 2.6 was extended with a trace log
- A Manipula setup acts as intermediate between CMA and their own system



# Call CMA Synchronization

PROCEDURE CallCMASynchroniation

INSTRUCTIONS

```
res:= CALL(LocalInstallPath+'cma\cma.msux '+  
           '-W:'+LocalInstallPath+'cma -Q:true -&:HandleSynchronization('+Credentials+'))
```

ENDPROCEDURE



# Manipula extensions

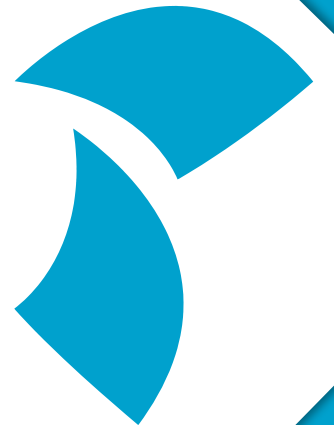
During implementation some/many generic extensions to Manipula were implemented. My two favourites:

- File assignment: `F:= G`
  - F & G are file handles inside the setup
  - F & G do not have to have same datamodel
  - Looking back I now wonder why Manipula 4 did not have this...
- Very late binding using `LOADDATAMODEL`
  - `MyMeta.LOADDATAMODEL(<filename>)` where MyMeta has been defined as (VAR)
  - All file handles using MyMeta are re-initialised.
  - Allows for reading/writing Blaise data that was unknown at start of setup



# CPI Application

Example of advanced CMA usage



# CPI application

- CPI = Consumer Price Index
- Designed in 2013 to collect prices for products in the Dutch Caribbean on a monthly basis
- Was originally a Blaise 4 Maniplus application running on a Windows tablet. Now converted to a Blaise 5 Manipula Dialogs applications that is hosted by CMA
- Uses a CMA 2.5 addition that allows CMA to start a Manipula Dialog package instead of a Datamodel package
  - See Appendix I of pdf for framework of such a setup
- For Manipula dialog package there is no survey database on the server
  - So survey data needs to be handled differently



# CPI application

- System works using a list of shops and each shop has a list of products that needs to be handled
- Input for the system is a csv file that holds all products for all shops
  - Still using the original definition made in 2013 to make transition from old system to new system easy
- In CMA each shop corresponds with one record in the launcher database
- The list with products is loaded in the blob field **CMA\_Data.Survey**
- The CPI application has read/write access to the launcher database
  - It is responsible for keeping the launcher database up-to-date



# CPI application

- In Blaise 5 it was originally designed to only run on a phone
  - CMA was adapted to enable running a phone (portrait mode; not allowed to switch to landscape)
- Recently it was changed to run also on a tablet
- This was done by introducing a second layout set
  - Not sure if that was a right decision because this now requires maintenance of the logic embedded in layout in two places, for instance enabling a button under a certain condition is now present twice





# Taking pictures

- The application also supports taking pictures of products
- Because of the size of pictures a mechanism was implemented to only download/upload changed pictures
  - Avoiding downloading same pictures for each new survey month
- CMA was extended with a mechanism to run a Manipula setup during synchronization
  - See Appendix G of pdf for framework of such a setup
- Pictures are stored in database on the server
  - CMA installs the datamodel of the database because it is defined as a child in the survey settings XML file



# Update pictures

The setup checks for changed/new pictures on server using the F.EXECUTEQUERY file method

```
SURVEYDATAFILE sdPictures:cpi_pictures
```

```
QUERYFILE qPictures
```

```
s:= 'SELECT productcode, lastchanged FROM CPI_Pictures_Form WHERE  
productcode like \"'+pShop+'%\"'
```

```
Res:= sdPictures.EXECUTEQUERY(s, qPictures)
```



# Next session...

- Consider visiting the Multimode / Case Management session



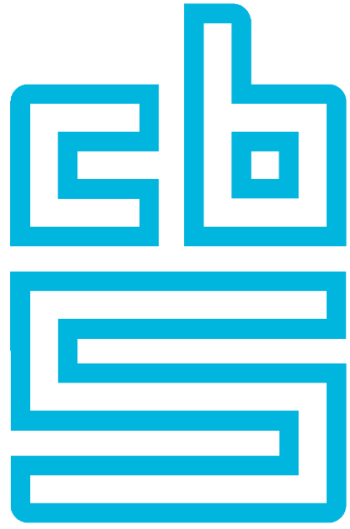
## Pre-Conference Training - October 23

Preconference training IBUC 2023			
		Room 1	Room 2
9:00am	9:45am	CMA/Admin tool/CPI	Performance testing
9:45am	10:30am		Manipula
10:45am	11:30am	Apps	Multimode / Case Management
11:30am	12:15pm	Building custom MVC apps	
1:15pm	2:00pm	Data	Deployment (Cloud/Fallback roles)
2:00pm	2:45pm	Data Entry Verification	
3:00pm	3:45pm	Tips and Tricks	
3:45pm	4:30pm	New feature demo	



**Thank you for  
participating  
in the training!**





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# CMA Admin Tool

The basics of the CMA Admin Tool



# Compiling CMA\_AdminTool

## Source files

- AdminTool\CMA\_AdminTool.bsol
  - CMA\_AdminTool: the user interface for supervisors/managers
  - CMA\_ManageInfo: datamodel who is a supervisor or manager and which surveys they can supervise/manage
  - CMA\_UserInfo: datamodel of all users (including interviewers) using CMA
  - CMA\_CustomScript: datamodel for database that can hold custom Manipula scripts that can be started by Admin tool (recent addition)
  - CMA\_AdminSettingsMeta: customize appearance and enable/disable features
- AdminTool\Demo\CMA\_AdminDemo.bsol
  - Contains additional Manipula setups to load cases and create a settings file



# Installing CMA Admin Tool

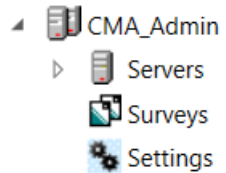
- Create an additional server park CMA\_Admin
  - Settings should be the same as the CMA and CMA\_App server parks
    - Run Mode = Disconnected; Sync Surveys When Connected = True
  - Users of the Admin Tool should have access to the following server parks
    - CMA
    - CMA\_Surveys
    - CMA\_Admin





# Installing CMA Admin Tool

- The server park CMA\_Admin



- Build the AdminTool\CMA\_AdminTool.bsol and install the multipackage CMA\_AdminTool.mbpkg at the server park CMA\_Admin

Instrument	Status
CMA_AdminTool	Active
CMA_CustomScript	Active
CMA_ManageInfo	Active
CMA_UserInfo	Active



**Rights**  
Specify the permissions for the user

Server Park:

- CMA
- CMAAdmin
- CMAApp
- CMASurveys
- LocalDevelopment

# Installing CMA Admin Tool

- Supervisors:
- Create a user (CMA\_Sup for the demo package) who uses the role CMA, and has access to CMA, CMA\_Surveys and CMA\_Admin



# CMA\_UserInfo/ManageInfo

- Add interviewers to CMA\_UserInfo
- Add Supervisors/Managers/Administrators to both CMA\_UserInfo and CMA\_ManageInfo
- Managers and Supervisors need to be added per survey

Cases

UserID	InstrumentID	SurveyName
cma_sup	2cbb4701-93fd-4217-8d56-02c769d2da11	EN=Labour survey,NL=Arbeidkrachtenonderzoek
cma_sup	a764d1a1-5277-4b1c-94ad-cf356dd2fba3	EN=ICT survey,NL=Automatiseringonderzoek
cma_sup	fe94aa68-e405-4ce4-84ab-e4a6a0139f45	EN=Health survey,NL=Gezondheidonderzoek
cma_sup	20cde0a2-67c2-4e6a-b02f-322065deb3e7	EN=Household survey,NL=Huishoudenonderzoek
cma_jen	fe94aa68-e405-4ce4-84ab-e4a6a0139f45	EN=Health survey,NL=Gezondheidonderzoek
cma_jen	20cde0a2-67c2-4e6a-b02f-322065deb3e7	EN=Household survey,NL=Huishoudenonderzoek
cma_man	2cbb4701-93fd-4217-8d56-02c769d2da11	EN=Labour survey,NL=Arbeidkrachtenonderzoek
cma_man	a764d1a1-5277-4b1c-94ad-cf356dd2fba3	EN=ICT survey,NL=Automatiseringonderzoek



# Supervisor Tool

- View/change cases for users
- View user logging
- Assign/Transfer/Restore/Release/Refresh/Reopen

The screenshot shows the 'CMA - Supervisor tool' window. At the top, there is a blue header with the title and two flags (UK and Netherlands). Below the header, there is a 'Surveys:' dropdown menu set to '<All>'. A table lists users with columns for 'User ID' and 'User name'. The table contains three rows: '<none>', 'CMA\_Ann' (Ann Blaise), and 'CMA\_Ben' (Ben Pascal). Below the table, there are buttons for 'Show cases', 'Export cases', and 'Restore user'. At the bottom, there are buttons for 'Logging', 'Switch Role', and 'Exit'.

User ID	User name
<none>	
CMA_Ann	Ann Blaise
CMA_Ben	Ben Pascal

The screenshot shows the 'List of cases for "CMA\_Ann"' window. It features a blue header with the title. Below the header, there is a 'Cases to show:' dropdown set to 'All' and a search filter. A table lists cases with columns for 'Location', 'Current owner', 'Start date', 'End date', 'Survey', and 'Town'. The table contains six rows of data. Below the table, there is a 'Select display order:' dropdown set to 'Identifier' and several icons. A detailed view of a case is shown below, including fields for 'ID', 'Status', 'Appointment', 'Last result', 'Last attempt', '# attempts', 'Town', 'Postal code', 'Address', 'Image', 'Name', 'Phone-1', and 'Phone-2'. A 'Case note' is displayed: 'This is the address of "Thor". You need to interview everyone present at this'. At the bottom, there are buttons for 'Change', 'Accept', 'Reopen', 'Close', 'Transfer', 'Restore', 'Release', 'Show attempts', 'Refresh', and 'Back'.

Location	Current owner	Start date	End date	Survey	Town
CLIENT	CMA_Ann			Health survey	Gotham City
CLIENT	CMA_Ann			Health survey	New York
CLIENT	CMA_Ann			ICT survey	New York
CLIENT	CMA_Ann			Health survey	Star City
CLIENT	CMA_Ann			ICT survey	Dakota City
CLIENT	CMA_Ann			Health survey	Central City

**ID:** 10,1    **Status:** Not started    **Appointment:**

**Last result:**    **Last attempt:**    **# attempts:**

**Town:** New York    **Postal code:** 72654    **Address:** School Street 26

**Image:**

**Name:**    **Phone-1:**    **Phone-2:**

**Case note:** This is the address of "Thor". You need to interview everyone present at this



# Supervisor Tool: Changing a Case

- Change case information in launcher
- Set status to REFRESHCASE\_REQ

List of cases for "CMA\_Ann", "ICT survey"

Cases to show: All Filter:

Location	Current owner	Start date	End date	Key	Town	Address	Name	Status
SERVER	CMA_Ann			15	Dakota City	Road to Avonlea 42	Virgil Ovid Hawkins	Complete
CLIENT	CMA_Ann			18	Coast City	Upper Downside 69	Hal Jordan	Not started
CLIENT	CMA_Ann			21	Chicago	Oxford Road 25	Brian Braddock	Not started
CLIENT	CMA_Ann			24	Wakanda	Piper Road 2	T'Challa	Not started
CLIENT	CMA_Ann			27	Blue Valley	Einstein Way 314	Courtney Whitmore	Not started
CLIENT	CMA_Ann			3	New York	2nd Avenue 7365 #132	Peter Parker	Not started
CLIENT	CMA_Ann			30	Washington DC	Capitol Hill 3	Lorena (Tula) Marquez	Closed
CLIENT	CMA_Ann			33	Chicago	Upper Downside 712	Donna Troy	Complete
CLIENT	CMA_Ann			36	New York	Awray Way 90	Diana Amazon Princess	Not started
CLIENT	CMA_Ann			39	New York	Fifth Avenue 9843 #768	Paul Canner	Not started
CLIENT	CMA_Ann			42	New York	Central Park 4	Reed Richards	Not started
CLIENT	CMA_Ann			45	Chicago	Blueberry Road 83	Rita Farr	Closed
CLIENT	CMA_Ann			48	New York	No Way 8	Adam Mann	Closed
SERVER	CMA_Ann	01/02/202	31/03/202	6	New York	Prof.Marmer Ave. 726 #654	Natasha Romanoff	Complete
CLIENT	CMA_Ann			19	New York	Main Street 5633	Pietro Maximoff	Not started

Select display order: Identifier

ID: 18 Status: Not started Appointment: # Attempts: 3

Last result: Last attempt: Last interview end time: First/Last download: First/Last upload:

Town: Coast City Postal code: 32433 Address: Upper Downside 69

Name: Hal Jordan Phone-1: 7683545143 Phone-2:

Case note: This person is also known as "Green Lantern"

#Cases: 15 (#Not started: 10, #Completed: 3, #Closed: 2) #Attempts: 3

Last attempt: 27-2-2023, 15:03:01 First/Last interview time: 21-2-2023, 15:48:37 / 27-2-2023, 15:02:53

Last interview end time: 27-2-2023, 15:03:00 Interview time used: 00:00:27 (00:00:09)

First/Last download: 16-2-2023, 13:42:38 / 16-2-2023, 13:42:38 First/Last upload: 21-2-2023, 15:48:52 / 27-2-2023, 15:03:06

Change Accept Reopen Close Transfer Restore Release

Show interview Show attempts Export survey data Refresh Back

Number of cases to edit: 1

Number of cases to edit: 1

Start date: mm/dd/yyyy 15

End date: mm/dd/yyyy 15

Supervisor:

Command line for edit:

Preload for edit:

Attempts route:

Details template:

Custom use:

Update cases Back



# Supervisor Tool: Transferring Cases

With the Admin Tool, it is possible to transfer cases in two ways

- Two Step: First the case goes to the server (current interviewer must sync). Next, the transfer user must sync
- One Step: Case is available for transfer interviewer immediately. A special instruction is used
  - Can remove null GUID after instruction has been executed
  - Null GUIDS will remain in the launcher database unless you delete them yourself



# Supervisor Tool: One Step Transfer

List of cases for "CMA\_Ann" x

 Do you want to wait for a transfer acknowledgement from the current interviewer before the actual transfer of cases takes place?

Cases

MainSurveyID	ID	CMA_ForWhom	CMA_InPossession	CMA_Location	CMA_CustomUse
fe94aa68-e405-4ce4-84ab-e4a6a0139f45	1,1	CMA_Ben			
00000000-0000-0000-0000-000000000000	20230227,11:53:20.108	CMA_Ann		RELEASE_SOME	fe94aa68-e405-4ce4-84ab-e4a6a0139f45;1,1

Cases Ann Syncs

MainSurveyID	ID	CMA_ForWhom	CMA_InPossession	CMA_Location	CMA_CustomUse
fe94aa68-e405-4ce4-84ab-e4a6a0139f45	1,1	CMA_Ben			
00000000-0000-0000-0000-000000000000	20230227,11:53:20.108	CMA_Ann		RELEASE_DONE	fe94aa68-e405-4ce4-84ab-e4a6a0139f45;1,1

Cases Ben Syncs

MainSurveyID	ID	CMA_ForWhom	CMA_InPossession	CMA_Location	CMA_CustomUse
fe94aa68-e405-4ce4-84ab-e4a6a0139f45	1,1	CMA_Ben	CMA_Ben	CLIENT	
00000000-0000-0000-0000-000000000000	20230227,11:53:20.108	CMA_Ann		RELEASE_DONE	fe94aa68-e405-4ce4-84ab-e4a6a0139f45;1,1

Last two steps can be done in any order



# Supervisor Tool: Two Step Transfer

List of cases for "CMA\_Ann"

Do you want to wait for a transfer acknowledgement from the current interviewer before the actual transfer of cases takes place?

Yes No

Cases

MainSurveyID	ID	CMA_ForWhom	CMA_InPossession	CMA_Location	CMA_CustomUse
a764d1a1-5277-4b1c-94ad-cf356dd2fba3	12	CMA_Ben	CMA_Ann	TRANSFER_REQ	

Cases Ann Syncs

MainSurveyID	ID	CMA_ForWhom	CMA_InPossession	CMA_Location	CMA_CustomUse
a764d1a1-5277-4b1c-94ad-cf356dd2fba3	12	CMA_Ben		TRANSFER_OK	

Cases Ben Syncs

MainSurveyID	ID	CMA_ForWhom	CMA_InPossession	CMA_Location	CMA_CustomUse
a764d1a1-5277-4b1c-94ad-cf356dd2fba3	12	CMA_Ben	CMA_Ben	CLIENT	

Ann must sync before case is available for Ben

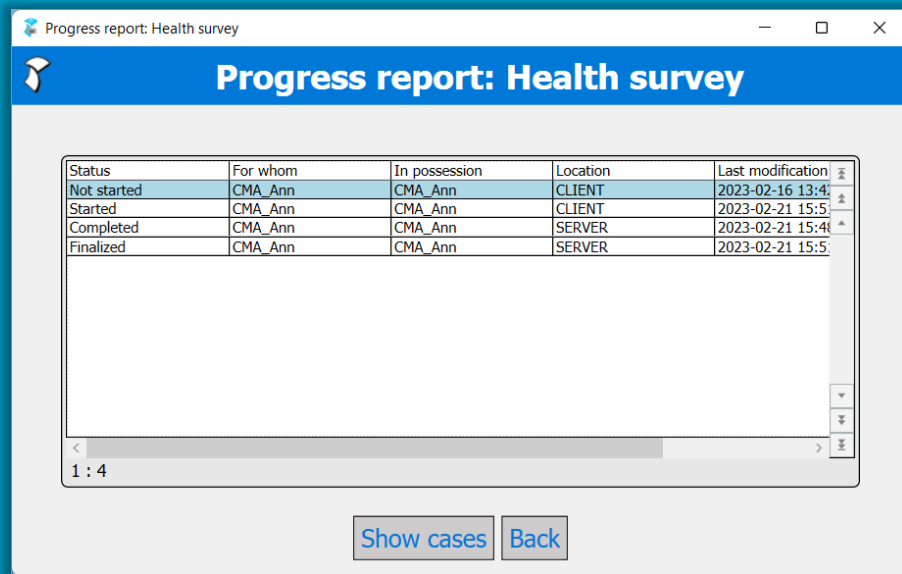
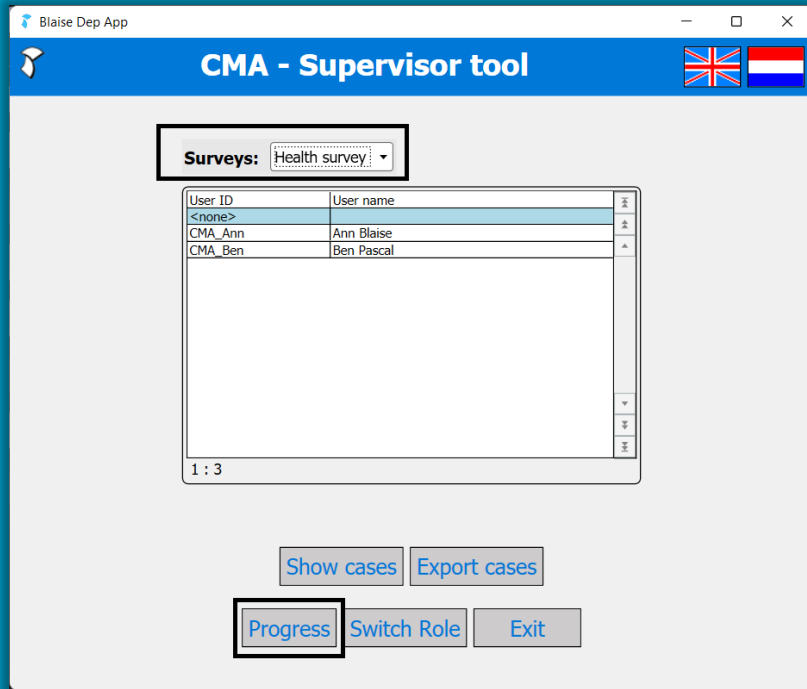




# Supervisor Tool: One vs. Two Step

- One Step
  - Pro: Ben doesn't have to wait for Ann to sync
  - Con: Ben doesn't have access to changes Ann may have made since last sync
- Two Step
  - Pro: Ben has the most up-to-date information regarding the case
  - Con: Ben has to wait for Ann to sync before he can receive the case





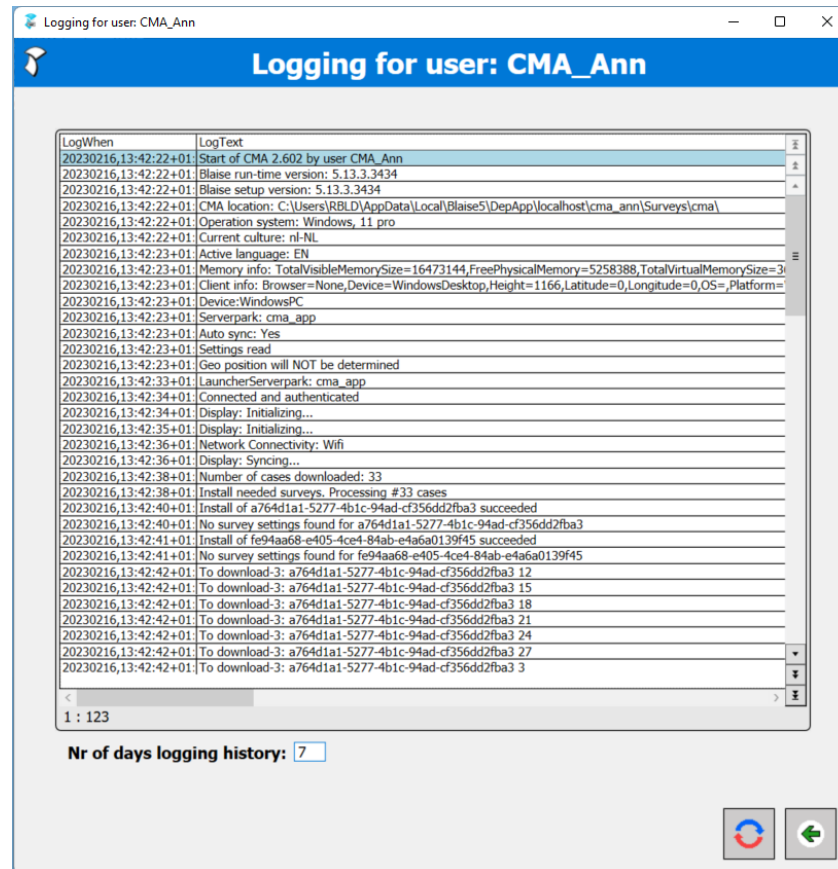
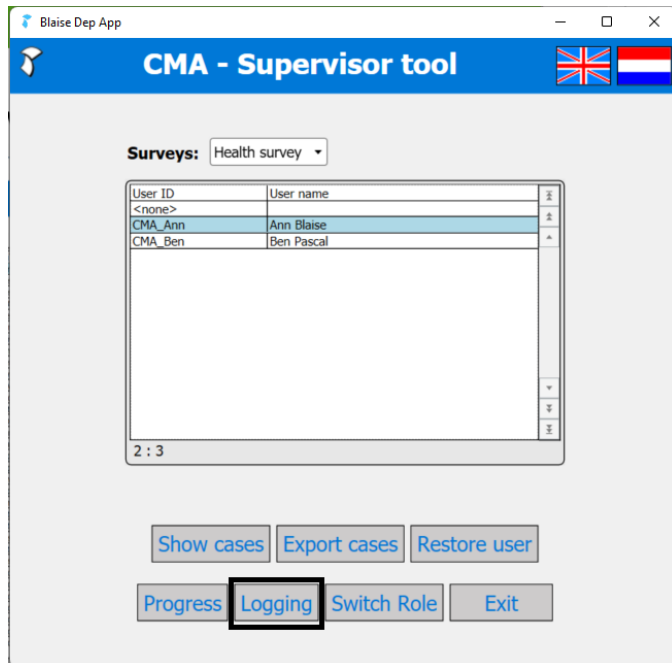
# Supervisor Tool: Progress Reports

- Get a progress report for the selected survey



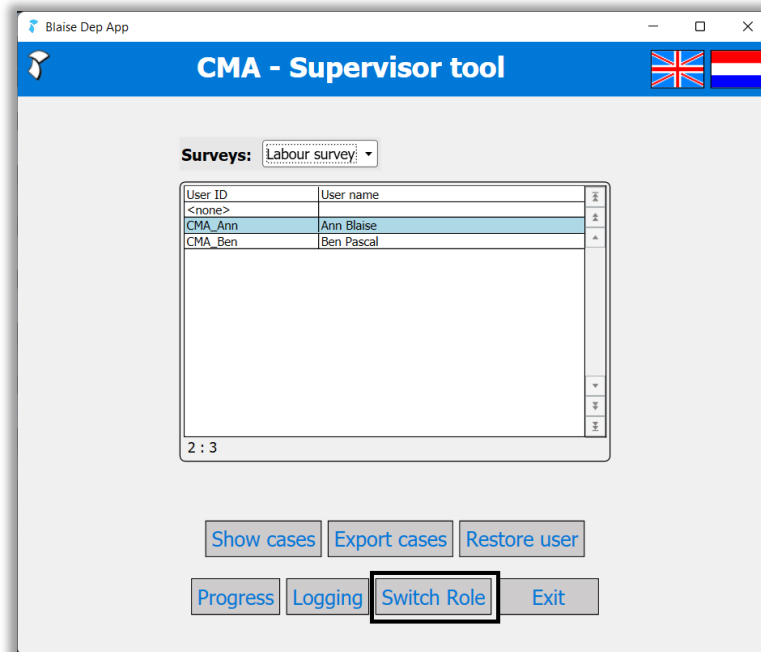
# Supervisor Tool: Logging

- View the logging uploaded by interviewers



# Supervisor Tool: Switching Roles

- Switch Role
  - Available to users with the following criteria
    - UserType = supervisor
    - ManagerID = <Empty>
  - Allows user to use both Supervisor and Manager functionality

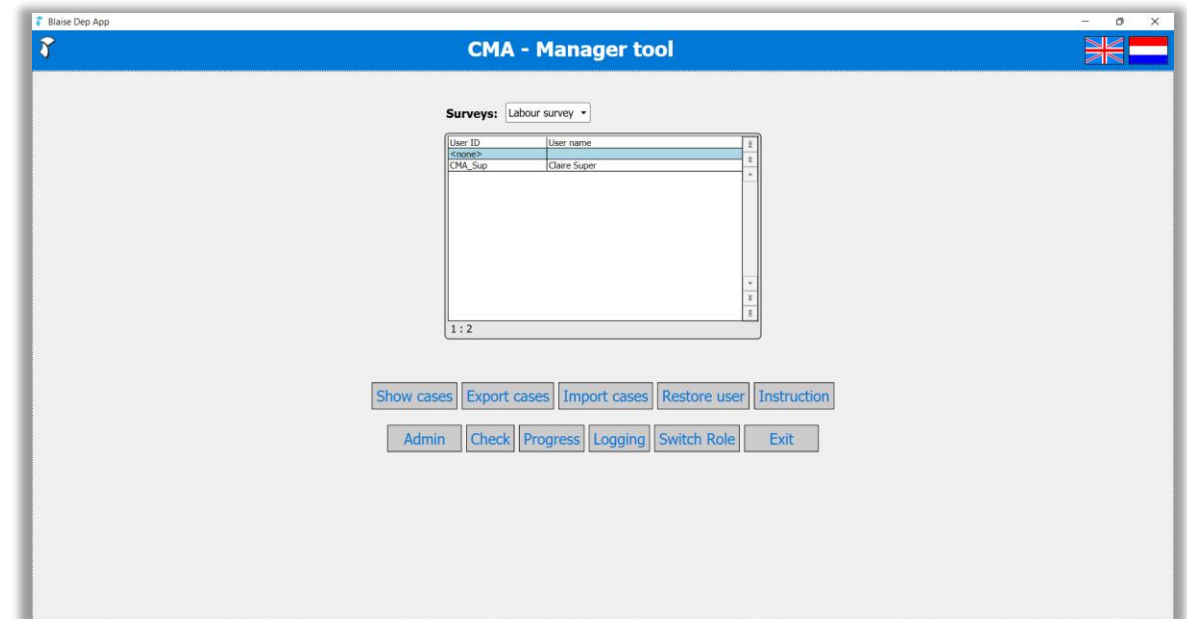


UserID	UserType	ManagerID	UserName	UserRole	AddressInfo	Location	MobileNr	DeviceInfo	SettingsFile
CMA_Ann	interviewer	cma_sup	Ann Blaise						<Empty>
CMA_Ben	interviewer	cma_sup	Ben Pascal						<Empty>
CMA_Joe	interviewer	cma_jen	Joe Surfs						<Empty>
CMA_Rob	interviewer	cma_jen	Rob Jones						<Empty>
CMA_Dan	interviewer	cma_jen	Dan Man						<Empty>
CMA_Eli	interviewer	cma_jen	Eli Jones						<Empty>
CMA_Sup	supervisor		Claire Super						<Empty>
CMA_Jen	supervisor	cma_sup	Jen Best						<Empty>
CMA_Min	supervisor	cma_sup	Min Sue						<Empty>
CMA_Man	manager		Anny Many						<Empty>



# Manager Tool

- Export/Import Cases
- Restore all cases for a selected interviewer
- Create Instruction
  - Release all cases
  - Release cases for selected survey
  - Release orphan cases
- Consistency Check
- Logging



# Manager Tool: Importing Cases

- Load a CSV/Excel file into the admin tool
- Cases can be generated in both the launcher and topic databases
- Add fields to CMA\_ContactInfo and CMA\_CustomUse

Prefix	Description
launcher:	This indicates that the column contains a value for the launcher. This prefix is optional (not using a prefix defaults to the launcher).
topic:	This indicates that the column contains a value for the topic (survey). For instance topic:person.firstname will assign the value to the field person.firstname in the topic database.
contact:	This indicates that the column contains a value for the CMA_ContactData fields. For instance contact:address will add a field-value pair to CMA_ContactData for address.
custom:	This indicates that the column contains a value for the CMA_CustomUse fields. For instance custom:projectcode will add a field-value pair to CMA_CustomUse for projectcode.



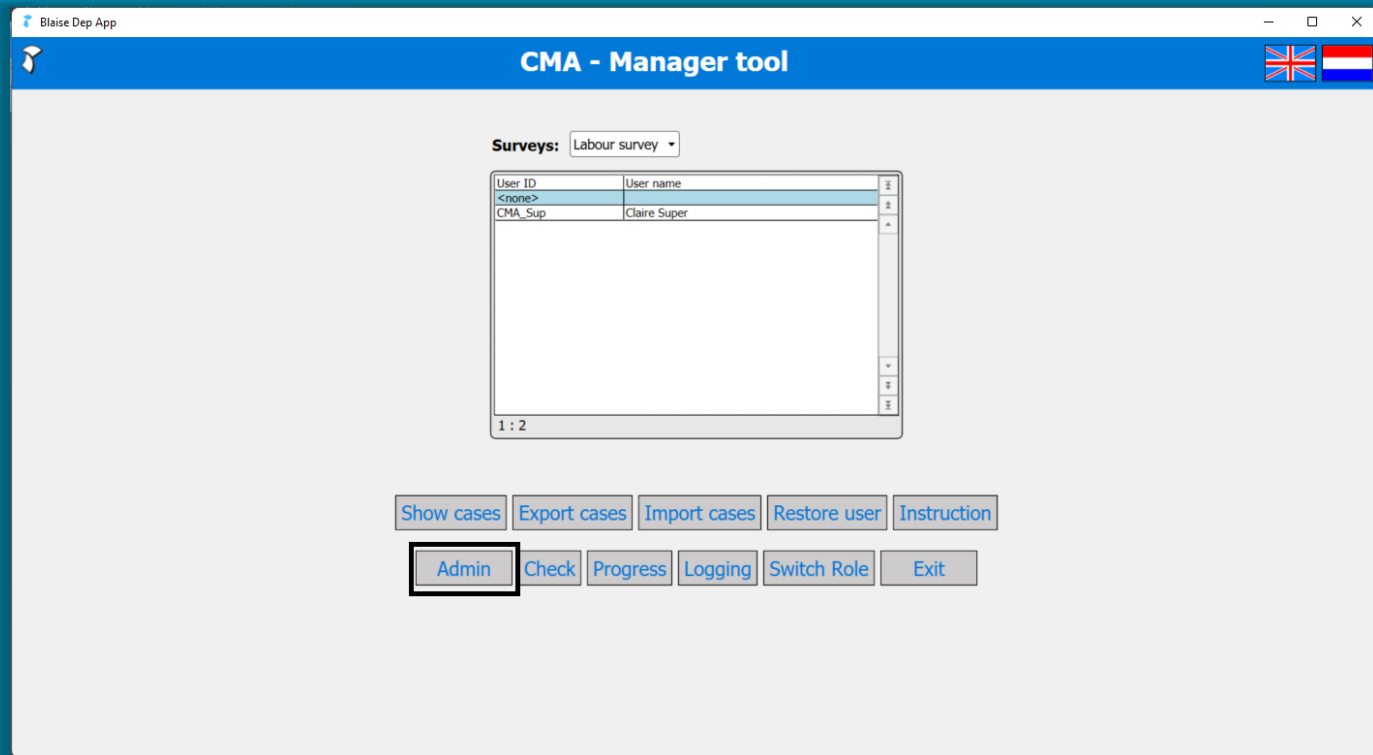
# Manager Tool: Consistency Checks

- Data saved as a blob in the launcher is compared with topic/attempts database
- If they are not consistent, you have the option to repair the case
- Data in the launcher (blob) is set in the topic/attempts database

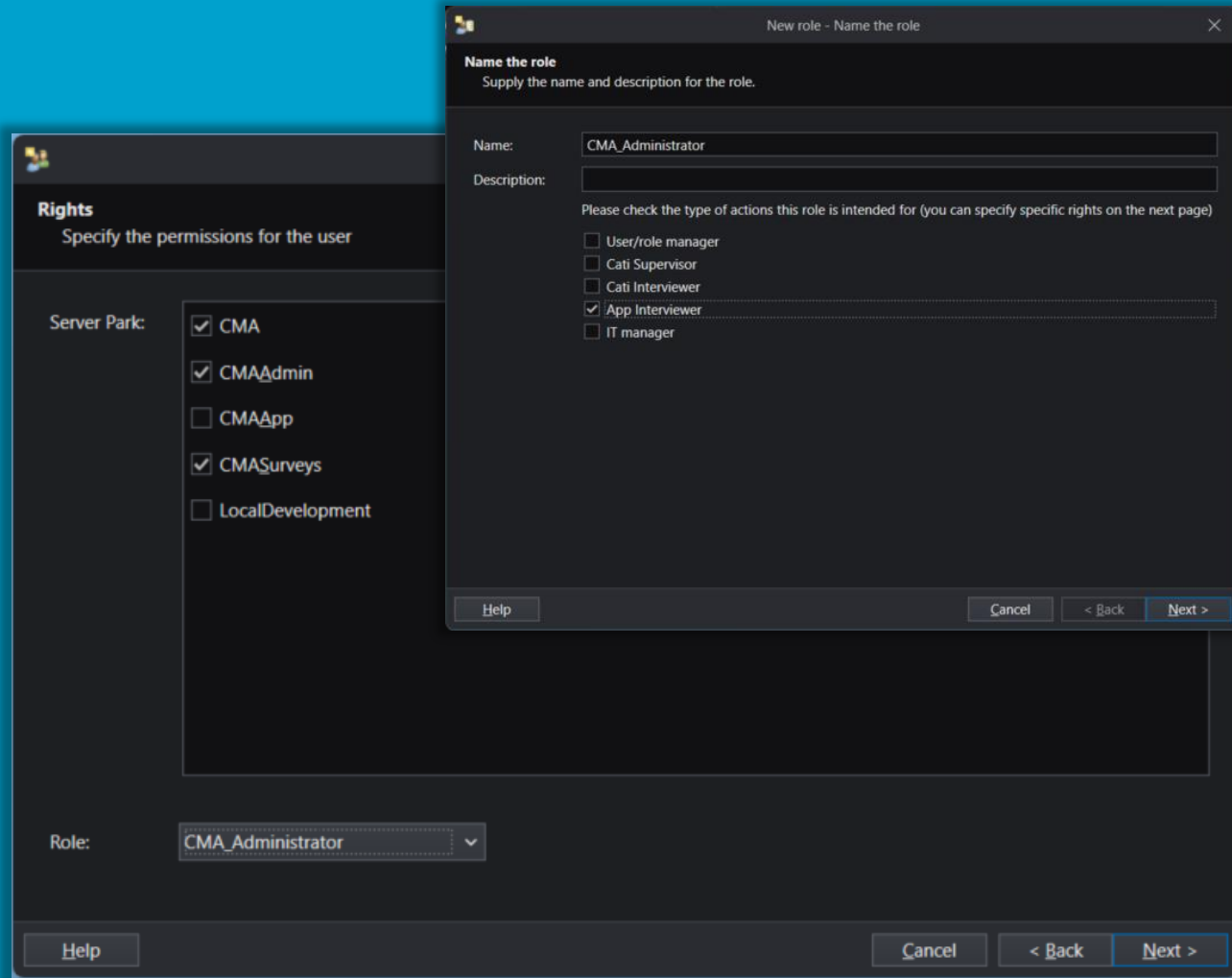


# Manager Tool: Admin

- Manager can switch to Admin role
- Use Administrator interface to add new users



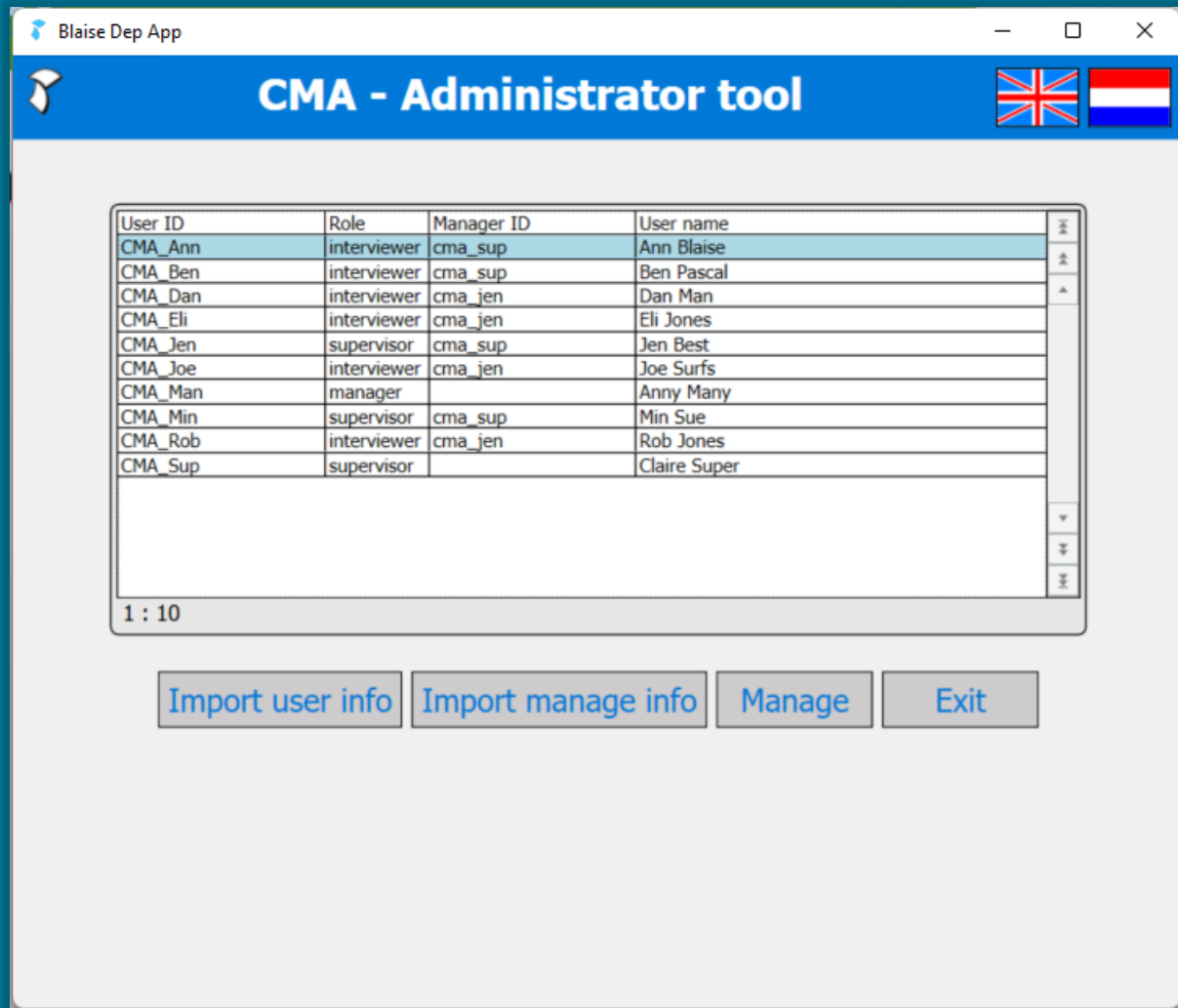




# Administrator Tool

- Can be accessed even if UserInfo/ManageInfo are empty
- Create a role in the server park  
“CMA\_Administrator”
- Create a new user with this role or assign role to existing user





# Administrator Tool

- Import Excel/CSV files into UserInfo/ManageInfo databases



# Administrator Tool

- Excel/CSV should use UserInfo/ManageInfo meta respectively
- First row in file should indicate the field names

	A	B	C	D
1	<u>UserID</u>	<u>UserType</u>	<u>ManagerID</u>	<u>UserName</u>
2	<u>CMA_Ann</u>	<u>interviewer</u>	<u>cma_sup</u>	<u>Ann Blaise</u>
3	<u>CMA_Ben</u>	<u>interviewer</u>	<u>cma_sup</u>	<u>Ben Pascal</u>
4	<u>CMA_Dan</u>	<u>interviewer</u>	<u>cma_jen</u>	<u>Dan Man</u>
5	<u>CMA_Eli</u>	<u>interviewer</u>	<u>cma_jen</u>	<u>Eli Jones</u>
6	<u>CMA_Sup</u>	<u>supervisor</u>		<u>Claire Super</u>
7	<u>CMA_Jen</u>	<u>supervisor</u>	<u>cma_sup</u>	<u>Jen Best</u>
8	<u>CMA_Man</u>	<u>manager</u>		<u>Anny Many</u>

	A	B	C
1	<u>userid</u>	<u>instrumentid</u>	<u>surveyname</u>
2	<u>cma_sup</u>	<u>2cbb4701-93fd-4217-8d56-02c769d2da11</u>	<u>EN=Labour survey,NL=Arbeidkrachtenonderzoek</u>
3	<u>cma_sup</u>	<u>a764d1a1-5277-4b1c-94ad-cf356dd2fba3</u>	<u>EN=ICT survey,NL=Automatiseringonderzoek</u>
4	<u>cma_sup</u>	<u>fe94aa68-e405-4ce4-84ab-e4a6a0139f45</u>	<u>EN=Health survey,NL=Gezondheidonderzoek</u>
5	<u>cma_sup</u>	<u>20cde0a2-67c2-4e6a-b02f-322065deb3e7</u>	<u>EN=Household survey,NL=Huishoudenonderzoek</u>
6	<u>cma_jen</u>	<u>fe94aa68-e405-4ce4-84ab-e4a6a0139f45</u>	<u>EN=Health survey,NL=Gezondheidonderzoek</u>
7	<u>cma_jen</u>	<u>20cde0a2-67c2-4e6a-b02f-322065deb3e7</u>	<u>EN=Household survey,NL=Huishoudenonderzoek</u>
8	<u>cma_man</u>	<u>2cbb4701-93fd-4217-8d56-02c769d2da11</u>	<u>EN=Labour survey,NL=Arbeidkrachtenonderzoek</u>
9	<u>cma_man</u>	<u>a764d1a1-5277-4b1c-94ad-cf356dd2fba3</u>	<u>EN=ICT survey,NL=Automatiseringonderzoek</u>




# CMA\_AdminSettings.xml

- A number of settings from CMA can be used for the Admin Tool as well
- Admin Tool specific settings to enable and disable buttons for Supervisors, Managers and Administrators
- See the Admin Tool documentation for a complete list of settings
- Create this file using Manipula
- Added to Admin Tool via bcps, make sure to rebuild the admin tool after changing settings



# CMA\_AdminSettings.xml: Admin-specific settings

- sMultiSelect: select more than one user for an action
  - E.g. Transfer multiple cases from one user to another
  - Enables multi select buttons 
- sRestoreUserBtn, sShowInterviewBtn, sAssignBtn, sAssignSupervisorBtn, sAcceptdBtn, sTransferBtn, sRestoreBtn, sReopenBtn, sReleaseBtn, sCloseBtn, sExportCSVBtn, sImportCasesBtn, sCheckBtn, sLoggingBtn, sProgressBtn, sInstruction, sEditBtn
  - Buttons across all interfaces can be enabled/disabled
- sAllowAdminTasksForManager: Allow managers to access the Administrator Tool



# CMA\_AdminSettings.xml: Admin-specific settings

- sExcelExePath: The location of Excel (the Admin Tool will try to open a generated CSV file for you)
- sExcelOutputPath: Path where csv files will be written to
- sShowSummary: Display an additional details template in the case overview
- sShowUDInSummary: Adds first
- sDataExportSep / sDataImportSep: separators used when exporting/importing CSV files



# CMA\_AdminSettings.xml: Admin-specific settings

- sShowSummary: Display an additional details template in the case overview
- sShowUDInSummary: Adds first/last download and upload to summary template

The screenshot displays a web application window titled "List of cases for 'CMA\_Ann'". It features a table of cases with columns for Location, Current owner, Start date, End date, Survey, Town, Address, and Name. Below the table, there is a "Select display order" dropdown set to "Identifier". A detailed summary for a case is shown, including fields for ID, Last result, Town, Image, Name, Case note, and a summary table with statistics like #Cases, Last attempt, Last interview end time, and First/Last download/upload times. At the bottom, there are buttons for "Change", "Accept", "Reopen", "Close", "Transfer", "Restore", "Release", "Show attempts", "Refresh", and "Back".

Location	Current owner	Start date	End date	Survey	Town	Address	Name
SERVER	CMA_Ann			Health survey	Gotham City	Main Street 4522	
CLIENT	CMA_Ann			Health survey	New York	School Street 26	
CLIENT	CMA_Ann			ICT survey	New York	Norman Bates Way 22	Susan Storm
CLIENT	CMA_Ann			Health survey	Star City	Opal Road 15 #312	
CLIENT	CMA_Ann			ICT survey	Dakota City	Road to Avonlea 42	Virgil Ovid Hawkins
CLIENT	CMA_Ann			Health survey	Central City	ElmStreet 666	
CLIENT	CMA_Ann			ICT survey	Coast City	Upper Downside 69	Hal Jordan
CLIENT	CMA_Ann			Health survey	Guardian	Metropolis Diagon Alley	
CLIENT	CMA_Ann			ICT survey	Chicago	Oxford Road 25	Brian Braddock
CLIENT	CMA_Ann			Health survey	Metropolis	Upper Downside 69	
CLIENT	CMA_Ann			ICT survey	Wakanda	Piper Road 2	T'Challa
CLIENT	CMA_Ann			Health survey	Opal City	Road to Nowhere 8	
CLIENT	CMA_Ann			ICT survey	Blue Valley	Einstein Way 314	Courtney Whitmore
CLIENT	CMA_Ann			Health survey	New York	Upper Downside 34	
CLIENT	CMA_Ann			ICT survey	New York	2nd Avenue 7365 #132	Peter Parker
CLIENT	CMA_Ann			ICT survey	Washington DC	Capitol Hill 3	Lorena (Tula) Marc
CLIENT	CMA_Ann			Health survey	Metropolis	Stratford Ave. 98	
CLIENT	CMA_Ann			ICT survey	Chicago	Upper Downside 712	Donna Troy
CLIENT	CMA_Ann			Health survey	Star City	Landslide 1	

ID:	1,1	Status:	Completed	Appointment:	
Last result:	100:Questionnaire is complete	Last attempt:	17-4-2023, 11:47:11	# attempts:	1
Town:	Gotham City	Postal code:	82634	Address:	Main Street 4522
Image:					
Name:		Phone-1:		Phone-2:	
Case note:	This is the address of "Batman". You need to interview everyone present at this address				

#Cases:	33 (#Not started: 31, #Started: 1, #Completed: 1)	#Attempts:	2
Last attempt:	17-4-2023, 11:50:42	First/Last interview time:	17-4-2023, 11:46:57 / 17-4-2023, 11:46:57
Last interview end time:	17-4-2023, 11:47:11	Interview time used:	00:00:14 (00:00:14)
First/Last download:	17-4-2023, 11:35:45 / 17-4-2023, 11:35:45	First/Last upload:	17-4-2023, 11:47:20 / 17-4-2023, 11:51:13



# CMA\_AdminSettings.xml

```
1  SETTINGS AUTOREAD=NO
2
3  USES CMA_AdminSettingsMeta
4
5  OUTPUTFILE Outp:CMA_AdminSettingsMeta('CMA_AdminSettings.xml',XML)
6  SETTINGS
7    CREATEBDIX=NO
8
9  MANIPULATE
10     //show all available buttons in the demo...
11     sShowInterviewBtn:= yes
12     sAcceptBtn:= yes
13     sReopenBtn:= yes
14     sTransferBtn:= yes
15     sRestoreUserBtn:= yes
16     sReleaseBtn:= yes
17     sRestoreBtn:= yes
18     sCloseBtn:= yes
19     sExportCSVBtn:= yes
20     sExportDataBtn:= yes
21     sMultiSelect:= yes
22     sAssignBtn:= yes
23     sShowSummary:= yes
24     sShowUDinSummary:= yes
25     sImportCasesBtn:= yes
26     sCheckBtn:= yes
27     sLoggingBtn:= yes
28     sProgressBtn:= yes
29     sInstructionBtn:= yes
30     sAllowAdminTasksForManager:= yes
31     sAssignSupervisorBtn:= yes
32     sEditBtn:= yes
33     sAddStartDateToFieldFilter:= yes
34     sAddEndDateToFieldFilter:= yes
35     sEditParts:= [seStartDate,seEndDate,seSupervisor,seCmdlineForEdit,sePreloadForEdit,seAttemptsRoute,seDetailsTemplate,seCustomUse] //all fields...
36
37
38     sExcelExePath:= 'C:\Program Files\Microsoft Office\root\Office16\EXCEL.EXE'
39     //sExcelExePath:= 'c:\program files (x86)\Microsoft Office\Office16\EXCEL.EXE'
40
41     Outp.WRITE
```

