



fieldplus
fieldwork management system

Module Name	Feature	Explanation / use cases / benefits	Further Benefits
Interviewers database	Full personal details such as unique code. address, telephone, bank details etc	With full history plus facility for additional user-defined fields for profiling and other information. Full quick lookup and search facilities e.g. by region or town etc.	Quick and easy export option for mail merge
	Notes and delivery details	Can have alternative delivery instructions	Alternative delivery instructions available in allocations with option to print on labels by job
	Each record linked to geographical region and supervisors)	Produce listings with full details for each region/supervisor. Also provide facility for supervisors to access system and view only their interviewers and jobs.	
	Suspend and allowed to work option	Can suspend interviewers who are awaiting legal documentation or if under investigation for QC or if taking work break and therefore not visible in job allocations. Override option "allowed to work" can be used if required for allocations but person remains "suspended" with visible ** against surname	Time saving if person not fully trained or suitable. Option to exclude Suspended interviewers in all reports. Suspended status is a user-defined feature so clients can personalise as required. Option to "HIDE" suspended records from view.
	MRS IID Card module [fieldplus^{id}]	Produce in house MRS [or client's own] IID Cards complete with digital photos	Maintenance and administration made easy.
	References	Store reference information and follow up	
	Training Details	Full history with user defined training types with feedback and follow-up. Ability to link training type to a specific job	Prevent interviewers with specific job training being allocated
	Work Experience details	Experience can be noted from application form or reference source or system will build up automatically. Can be used to record skill types such as languages etc. Displays last date job type done -	useful for providing reference or appraisal information
	Payroll Details	Full bank and tax details. Ability to fix rate for Interviewer according to region and skills. Can be modified on per job basis. Handles variable Holiday Pay rates whether accrued by time or money.	Can produce export file to integrate with external payroll systems
Quality Control Monitoring - linked within Interviewers	Validation, Appraisal and Editing Monitoring	Can be monitored for each of QC types - via Interviewers form, Information is fed to allocation/booking in and noted on status reports.	Visible reminder for all users. Additional user-defined fields for more detailed reporting.
	Validation History	Full details of all backchecking on jobs, dates, results and feedback	Prompts for allocations flagged for any QC at booking in

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	Appraisal History	Full details of all observations also type of observation on jobs, by whom, dates, results and feedback	Prompts for allocations flagged for any QC at booking in
	Editing History	Full details of questionnaire editing on jobs, dates, number edited with results and feedback	Prompts for allocations flagged for any QC at booking in
	Additional User defined QC module	Can be used for feedback, ongoing other quality control functions	Can be set up with prompts as for other QC functions such as Feedback etc.
Job Management	Job Setup	Register of all jobs with type, topic, methodology, schedule of dates and information on HO contacts for job	Can link training type to job and see on-screen job progress
	Job Types	All job types catered for [see below]	In addition to Standard & Interlocking quantitative quota tracking for Quant surveys
	Qualitative module	For Groups, depths, accompanied shops etc. Copy and paste facility. Produce spec sheets, overall control documents of groups and moderators; moderator check forms and respondent signature sheets. Respondent linking.	Standard and user-definable reports available to integrate company style and logos where applicable. Linked to the Respondent's database to give full flexibility to record details of respondents, if they have worked previously and list respondent by recruiter and job. Crucial quality control facility for pre-group recruitment as recommended by current QC standards.
	Halls [Central Locations]	Link to venue, scheduler for multiple dates. Produce Hall Schedules by date and forms for validations and feedback	Standard and user-definable reports available
	Mystery Shopper/Pre Select surveys	Import facility for sample with user defined fields. Allocate range of sample to interviewer and control result by job specific outcomes	Standard and user-definable reports available. Template for import file available. Ability to export and re-import sample details.
	Client & Third Party database	Link client to jobs, enter company and individual details, copy facility. All categories e.g. client, supplier etc.	Produce Status reports and Christmas Card lists
	Division	For internal use, showing divisions such as HO, Field, Internal etc.	Produce Status reports
	Venue [Location] database	Record all details of venues such as central locations, viewing facilities	Facility for user-defined information such as parking; kitchen facilities etc and photographs
	Budget and costings	Enter budgeted costs and produce results by entering payclaims	Can export interviewer fees, expenses and advances to external payroll systems controlled by payrun e.g. batch, monthly or weekly etc.
	Unique code protection and wave option	Keep job number with options to roll out waves and report on the job in total	
Job Closedown	Can prevent any additional changes to job or allocations once closed	Facility to "HIDE" closed jobs from view.	

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	Job Fees and Expenses	Use company defaults for specific fees combined with a fee scale e.g. Senior Interviewer inner city, Senior Interviewer rural area etc.	Produce personalised payclaims per allocation
	QuotaBreaker! module	Integrated quota breaking system that uses circular spread to calculate quota breakdowns	Calculates breakdown in minutes, produce overall office controls and individual quote sheets for interlocking and non-interlocking quotas. Handles minimum/maximum figures. Copy and paste facility for timesaving with import facility into fieldplus
	Job Allocations	Facility for bulk and multiple job allocations linked to sample points. Add allocation comments. Interviewers can work in areas other than their own.	Produce worksheets, spec sheets and quota sheets and generate labels; View listings of allocations and details; Produce progress and status reports by Region and Supervisor
	Job QC Setup	Monitoring facility to control overdue/required Quality Control right through allocation and booking in	
	Booking In/Return of work	Book in individually and by quota. Progress chasing can be done separately by Supervisors and checked off against actual returns.	Control QC and produce ongoing status reports and check performance of what is "claimed" to have been done as opposed to actual
Quality Control Module	Full Validation, Appraisal and Editing facility	Details of date, job, type of observation, overall comment, full note field [up to 500 digits per transaction] and follow up action and date, entered by Job. Links to QC in Interviewer records and Job management	Track QC from setup of job right through processes with prompts in allocations and booking in. Produce variety of reports to control due and overdue QC. Ideal to handle requirements of IQCS, MRQSA/BS7911 and ISO 20252 standards.
Respondent Module	Full respondent database, with links to recruiters, jobs and topics etc.	Provides full per-recruitment validation facility with dynamic lookups for easy searching. Can produce invitations and incentive receipts and other relevant paperwork.	Track history by recruiter, job, topic and date for Qualitative and Validation purposes only. Ability to link to PAF files.
Payroll Module	Allows set up of job fees and expenses	To produce personalised pay claims per allocation.	To reduce errors on fees and expenses
	Payclaim Entry and controls	Control payments by week, month etc with auditable history by interviewer, batch and job	Produce itemised pay advise slips for each payment; Full reporting by payclaim, interviewer totals etc. Multi currency function linked to individual interviewer rates.
	Calculation of Holiday Pay	Can be set to pay for rolled up or accrued holiday pay. Can be accrued either in money or time basis.	Full audit trail for accrued holiday pay. Can have variable rates.

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Overall features	Export option	Create export reports to link with external payroll software. [not part of standard system] Brings function into Fieldwork/Accounts remit.	Also option to import scanned payclaims - this would be considered outside the standard system.
	Full Payroll Processing Module	Integrated third party payroll software, Earnie 32 from Intex.	Comes with training and annual support option.
	Fully comprehensive list of reports and listings	The standard system has around 200 reports. These can be viewed on screen, printed, saved as file or emailed	Sorted by Category and unique naming feature. All reports are dated and display name, date and time of person printing. Additional User-Defined Reports can be produced and charged accordingly. Client can produce own reports
	Facility for in-house personalisation for screen names, e.g. Interviewer Status or Interviewer Category Forms have user-defined	Ease for in-house maintenance.	Main forms such as Interviewers, Jobs, Venues, Respondents have additional user-definable fields ready for activation
	Dynamic Lookup facility	Fast and effective lookup facility with export option	Can produce lookups for export to Excel or for mail merge data files.
	Export/Import facility	Existing Interviewer and Sample Point information can be imported and exported.	These may be specifically produced for each client and will fall outside standard system.
	User Management options	Fully definable user rights with CRUD attributes. Users can have own menus	Can protect main details from unnecessary deletion or modifications for certain users. Supervisors can view own interviewers and jobs remotely.
	Upgrade and Maintenance	Full administrator utilities such as linking tables, running SQL codes for updating fields and records; import facility to import modified or new report.	Annual maintenance does not necessarily require specialised IT support.

for further details of the **fieldplus** fieldwork management suite of systems - please call **Sue Levene** or **Keith Gordon** on **0844 8042469** or email **info@fieldplus.com**.