

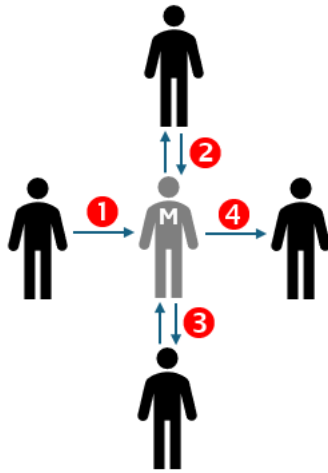


Global Oral Genealogy Contractor Audit Tool (CAT) Training Guide v1

Preliminary Preparation

You will need stable and consistent internet access while using the CAT.

You will need a document like the following to track the status of all interviews. The Pedigree Entry Form (PET) does not know the status of an interview—only the CAT does.



1. Field Manager gives paper collection form (PCF) mobile app file (ZIP) to Manager.
2. Manager gives paper collection form (PCF) to Data Entry Clerk. Data Entry Clerk transcribes interview into the Pedigree Entry Tool (PET), then returns paper collection form (PCF) to Manager.
3. Manager gives paper collection form to Paper Scanning Clerk. Paper Scanning Clerk scans paper collection form, then returns paper collection form and .PDF file to Manager.
4. Manager files paperwork and gives mobile app file (ZIP) and scanned paper collection form (PDF) to CAT Operator.

Manager's Interview Tracking Log							
	Rec'd PCF and ZIP from FM	Rec'd PCF from DEC	Rec'd PDF from PSC	Gave PDF and ZIP to CAT Ops	Need ZIP Rework?	Need PDF Rework?	Need PET Rework?
foldername	✓	✓	✓	✓			
foldername	✓	✓	✓				
foldername	✓	✓					
foldername	✓						
foldername							

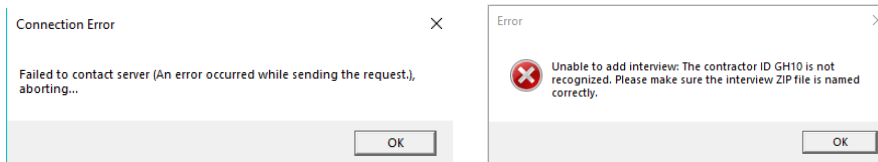
Before running the CAT, create a folder on your computer for each interview. Then, for each interview, add the following files to each interview folder:

1. The mobile app zipped file
2. The scanned paper interview collection form

GH10_004_20180605_1145.zip	9/25/2018 1:02 PM	Compressed (zipp...	11,688 KB
GH10_004_20180605_1145.pdf	2/5/2019 10:08 AM	Adobe Acrobat D...	347 KB

Running the Contractor Audit Tool (CAT)

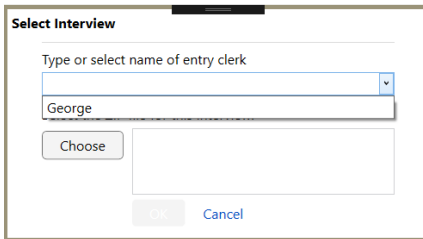
1. After your interview folders are prepared on the CAT computer, open the Contractor Audit Tool using the shortcut on the Desktop. **When starting the CAT, you will need to be connected to the internet.**
 - a. If you are not connected to the internet, you will get a message like one of the following error messages:



2. Click [Add Interview].

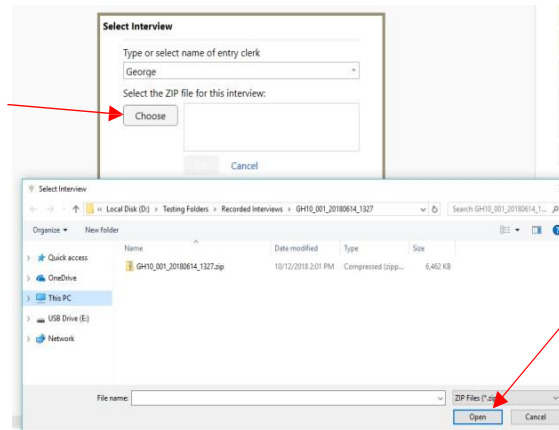


3. Type in the data entry clerk's name or if you have entered their name before, select them from the dropdown menu.

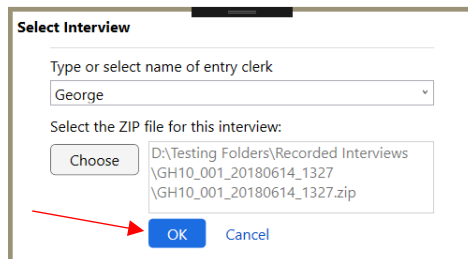


The 'Select Interview' dialog box has a title bar 'Select Interview'. It contains a text input field with the placeholder 'Type or select name of entry clerk' and a dropdown menu showing 'George'. Below this is a 'Choose' button and a large empty text area. At the bottom are 'OK' and 'Cancel' buttons.

4. Click [Choose] and select the interview zipped file. Click [Open].



5. Click [OK]



The 'Select Interview' dialog box is shown again. The 'Choose' button is highlighted with a red arrow. The text area now displays the file path: 'D:\Testing Folders\Recorded Interviews\GH10_001_20180614_1327\GH10_001_20180614_1327.zip'. The 'OK' button is also highlighted with a red arrow.

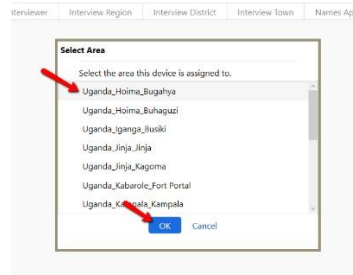
6. While running the first interview, you will see and verify the following:
 - a. Contractor Identity Verification.
 - i. If the information is correct, click [Yes].
 - ii. If not, click [No] and check the following:



The 'Contractor Identity Verification' screen displays the following information: Contractor ID, Account Name, and Email. Each field is followed by a redacted area (represented by horizontal bars). At the bottom, there are 'Yes' and 'No' buttons. A red arrow points to the 'Yes' button.

- iii. If the Contractor ID or account name are wrong, the interview name is not linked to your account. Make sure that the mobile phone is set up with the correct account information.
 - iv. If the email or phone number are incorrect, contact your Operations Manager.

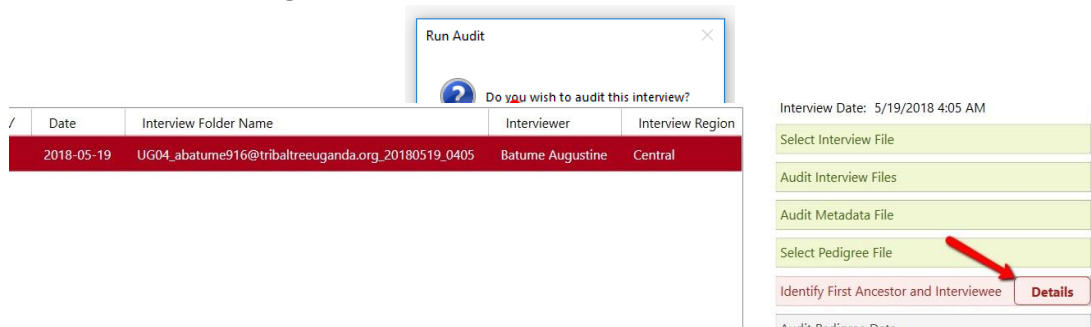
- b. You will be prompted to then select one of the geographical areas assigned to you.



7. The interview will then appear in the “In Progress” section of the CAT.
8. Click on the interview you wish to audit and click the [Start] button next to “Audit Interview Files.”

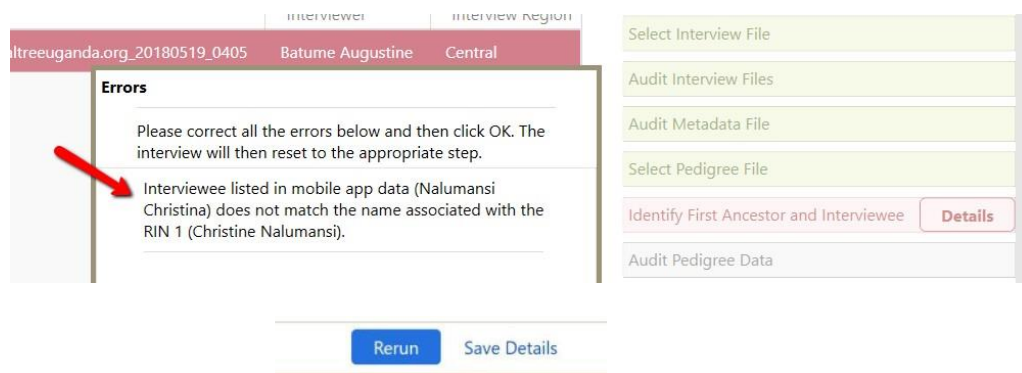


9. Click [Yes] to begin the CAT audit.

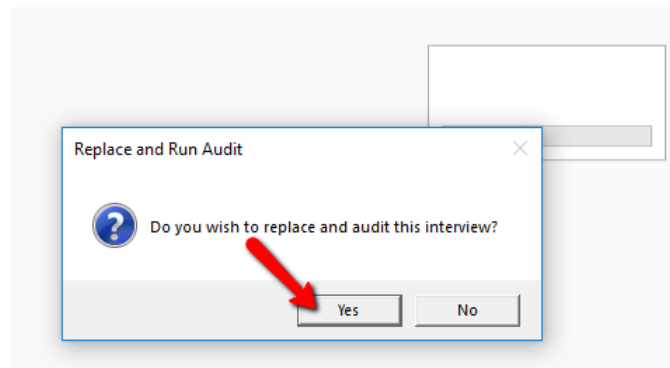


10. If an interview fails the CAT audit, the interview row in the CAT interface will turn red and the step in the right-hand column that the interview failed will turn red. Click the [Details] button to view or print the error message.

- a. If you are not able to resolve the error with the interview immediately, click on the [Save Details] button. You can then come back later and click on the error details to review and correct the error.
- b. After you correct the errors described in the bottom portion of the error message you will be able to rerun the interview by clicking on the [Rerun] button in the error message box. Then click [Start] and the CAT will prompt you to select the mobile app zip file of the interview to re-run the audit.



- The CAT will prompt you to replace the original interview file with the new interview file. Click [Yes] and the CAT will re-audit the interview.



- When the CAT audit is successfully completed it will automatically initiate the payment process.

Note: The CAT will not allow you to make any changes to an interview after it has been uploaded, unless it fails the VAC audit.

- After the CAT audit is complete, you will need to wait for the VAC audit to be completed before you will be able to see payment information for that interview.
- If an interview fails the VAC visual audit, the CAT will mark the “Records Operations Center Audit” red and move the failed interview into the “Issues” status. Follow the process detailed above to correct the error(s) and rerun the interview.

Select Interview File

Audit Interview Files

Audit Metadata File

Select Pedigree File

Identify First Ancestor and Interviewee

Audit Pedigree Data

Check for Duplicates

Update Metadata File

Request Payment

Copy Interview Files to External Drive

Records Operations Center Audit [Details](#)

Re-copy

- Clicking [Rerun] will allow you to process the interview again. Once you relaunch the CAT the interview will enter “Rework” status.

Interviews										
					Showing: Rework		Sort by: Interview Date			
✓	Progress	Date Loaded	Interview Date	Interview Folder Name	Interviewer	Interviewee	First Ancestor	Names Submitted	After Cutoff	Duplicate Name C
		2019-07-15	2018-06-16	GH10_001_20180616_1634	Prisca Dufie	Gladys Ohene	Akwesi	60	0	59

- If the VAC passes the interview, the interview row will turn green, and the interview status will change to “Archive.” After a few weeks, the interview will no longer be visible in the CAT.

FamilySearch Contractor Audit Tool

Add Interview

Showing: All

Sort by: Interview Date

✓	Progress	Date Loaded	Interview Date	Interview Folder Name	Interviewer	Interviewee	First Ancestor	Names Submitted	After Cutoff	Duplicate Na
✓		2019-07-15	2018-06-14	GH10_001_20180614_1327	Prisca Dufie	Gladys Ohenewaa	Akwesi Owuna	60	0	0

Details

Interview Date: 6/14/2018 1:27 PM

Select Interview File

Audit Interview Files

Audit Metadata File

Select Pedigree File

Identify First Ancestor and Interviewee

Audit Pedigree Data

Check for Duplicates

Update Metadata File

Request Payment

Copy Interview Files to External Drive

Records Operations Center Audit

Complete and Archivable

Note: Interviews may be viewed by status, or all together.

Showing: All

Interviewer

Prisca Dufie

All

Ready

Issues

In Progress

Payment Requested

Ready To Archive

Rework