



## Africa Oral Genealogies & Family Histories Project

### Contractor Audit Tool (CAT) Training Guide

#### Preliminary Preparation


Before running the CAT, do the following:

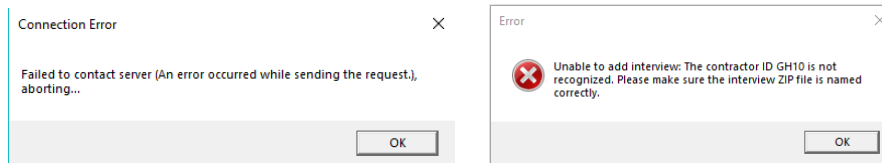
1. Have all the interview folders available on a flash drive. (Unless you prefer a different method of transferring files to the CAT computer.)
  - a. The mobile app zipped file
  - b. The Legacy file
  - c. The scanned pedigree

Name	Date modified	Type	Size
GH10_004_20180605_1145.fdb	9/25/2018 1:02 PM	Legacy Genealogy...	6,672 KB
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

2. Have another flash drive available to save the CAT produced interview zipped folders to send to the ROC. (If you have 2 USB ports, insert both flash drives. Make sure it is clear which is which.)

#### Running the Contract Audit Tool (CAT)

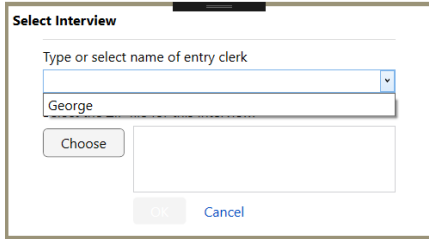
1. Insert the flash drive containing the interview folders.
2. Open the Contractor Audit Tool using the shortcut. 
3. NOTE: When starting the CAT for the first time, you will need to be connected to the internet. You will also need to be connected to the internet at the “Request Payment” step. (Until further notice, you will need to be connected to the internet to add any interview.)
4. If you are not connected to the internet, you will get the following error messages:



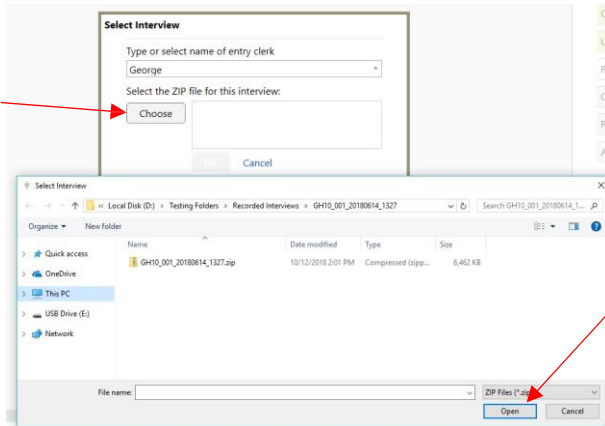
5. Click [Add Interview].



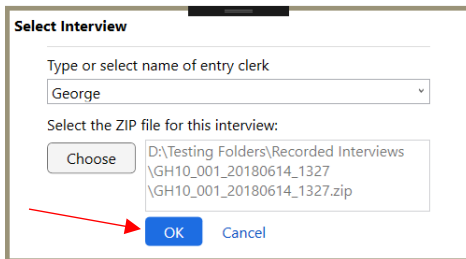
6. Type in the legacy entry clerk's name (if you have entered their name before select them from the dropdown menu)



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



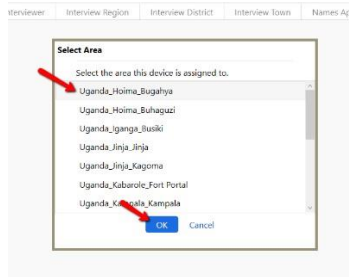
8. Click [OK]



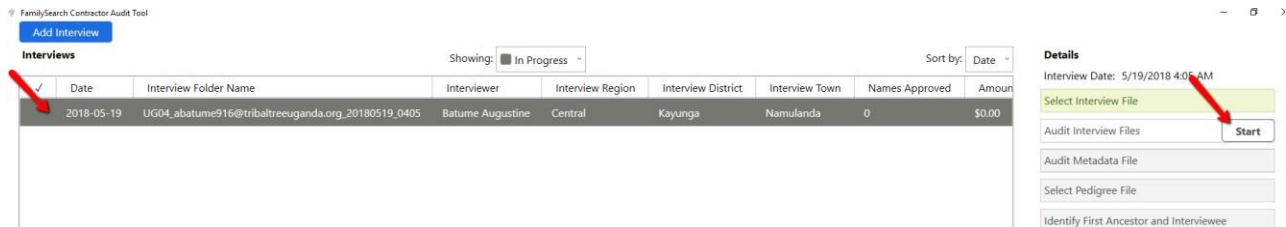
9. The first interview will require the following:
  - a. Contractor Identity Verification.
    - i. If the information is correct, click [Yes].
    - ii. If not, click [No] and check the following:
      1. If the Contractor ID or account name are wrong, the interview name is not linked to your account. Make sure that the mobile phone is set up with the correct account information.
      2. If the email or phone number are incorrect, contact your Operations Manager.



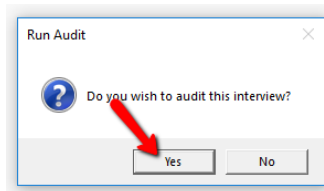
b. Select Area. Click the area that this device will be assigned to.



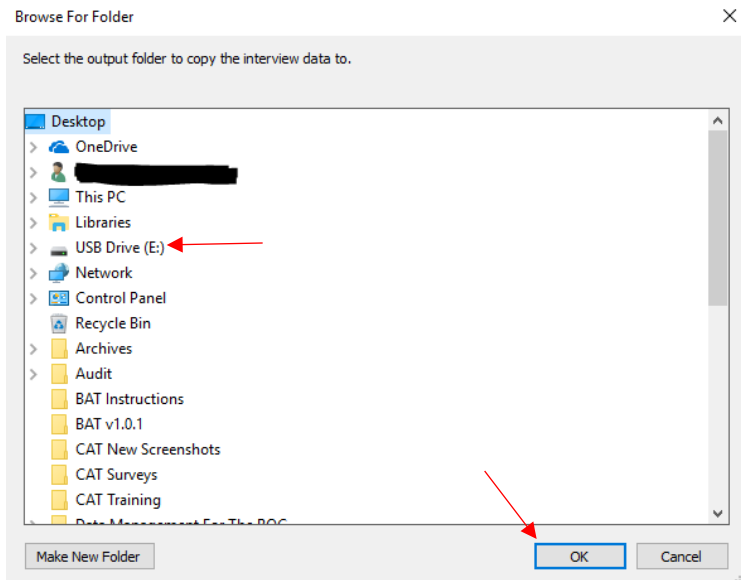
10. The interview will show up in the window. Click on the interview you wish to audit and click [Start] next to “Audit Interview Files.”



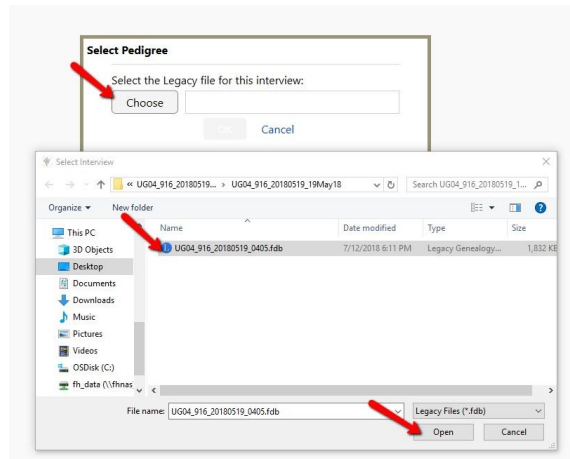
11. Click [Yes] to proceed. Let the CAT work.



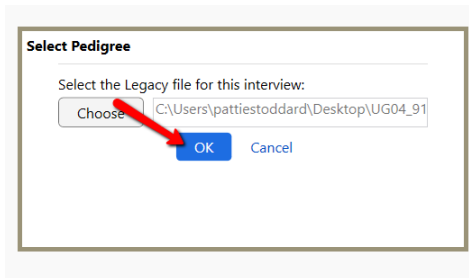
12. Select a removable drive to transfer the interviews to click [Ok]



- Select the Legacy file associated with this interview. Click [Choose]. Select the file and click [Open]. **If the CAT can find the legacy file on its own this step will be skipped.**



- The file name will appear in the box. Click [OK]. Let the CAT work.



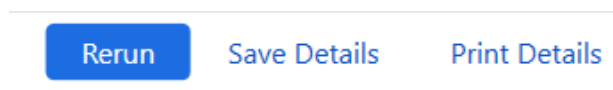
- The CAT will first compare the spelling of the First Ancestor and the Interviewee in the metadata file and the Legacy file. If there is a discrepancy, the interview line will turn red and the step in the right-hand column will turn red.

Date	Interview Folder Name	Interviewer	Interview Region
2018-05-19	UG04_abatume916@tribaltreeuganda.org_20180519_0405	Batume Augustine	Central

Interview Date: 5/19/2018 4:05 AM

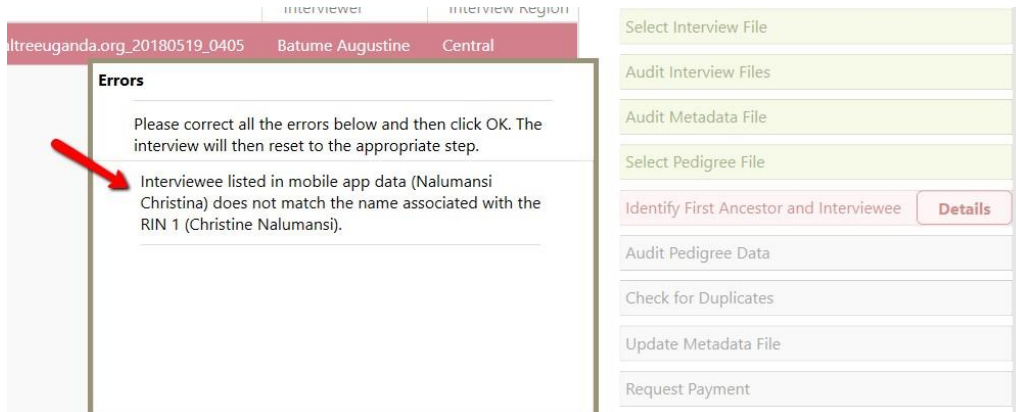
- Select Interview File
- Audit Interview Files
- Audit Metadata File
- Select Pedigree File
- Identify First Ancestor and Interviewee Details
- Audit Pedigree Data

(Note: When an error message appears, you will see the following at the bottom of the message box:



- If you can make the correction immediately and are ready to rerun the CAT, click on [Rerun].
- If you are not able to resolve the problem at that time, click on [Save Details]. You can then come back later and click on the error details to review the error.)

- If you need someone else to make a correction to the legacy file click [Print Details].
  - Click the [Details] button to see the “Errors” message box.



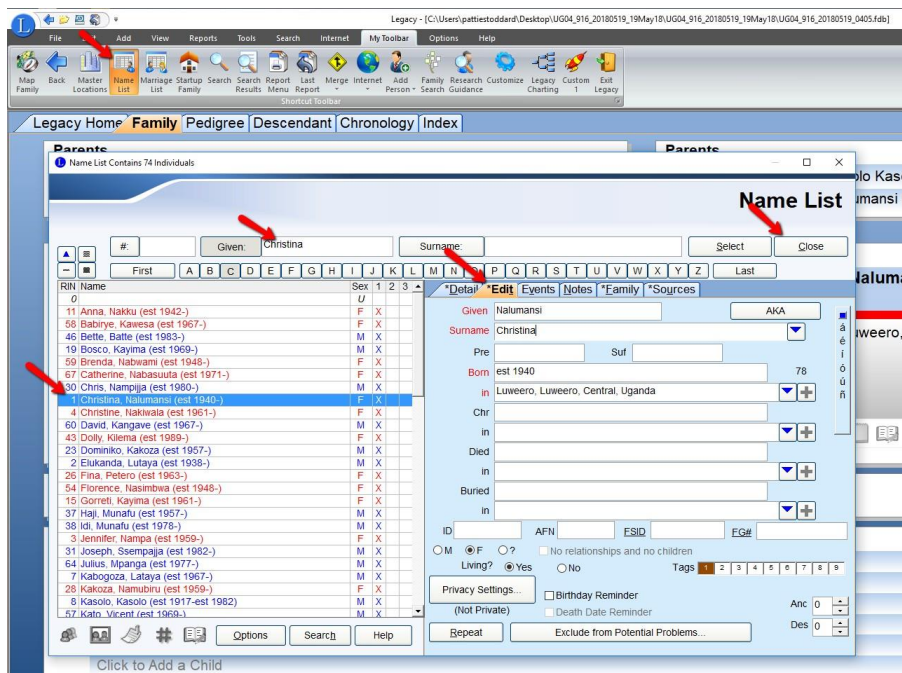
- Open the Legacy .json file in the interview folder to find the first and last names of the Interviewee or First Ancestor showing the error.

```

    "time": "U405"
  },
  "interviewee": {
    "age": 78,
    "birthPlace": {
      "REPID": 216,
      "country": "Uganda",
      "district": "Luweero",
      "region": "Central",
      "town": "Luweero"
    },
    "clan": "Nalumbi",
    "firstName": "Nalumansi",
    "lastName": "Christina",
    "tribe": "Muganda"
  }
}

```

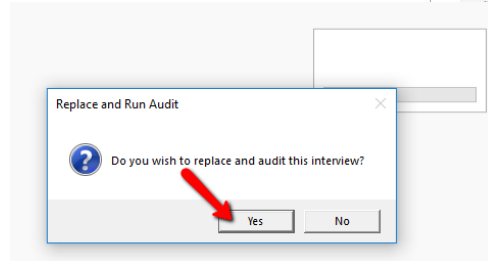
- Open the Legacy file and click on [Name List]. Type the name of the person and click on the name to select. Click on [Edit] and make the change. Click [Close].



- Go back to the CAT and click [Rerun] in the “Errors” message box.

Rerun Save Details

e. Select the interview and click [Start]. Click [Yes] to re-run the audit.



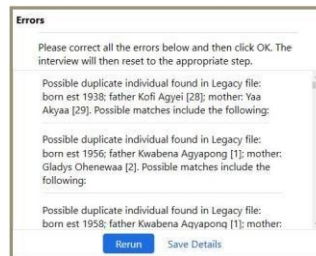
16. The tool will now continue to audit the interview.

17. The CAT will now check for Pedigree (Legacy file) data errors. If there are errors, the interview line and the step will turn red. Click [Details] to view the “Error” message box.



18. See “CAT Summary and Troubleshooting Guide” for a list of possible errors and solutions.

19. The CAT will then check for Duplicates. If there are duplicates, the CAT will show an error message and fail the interview.



20. The CAT will then automatically update the metadata file and request payment. Note: You must be connected to the internet to run the “Request Payment” step.

21. Note: The CAT will not allow you to make any changes to an interview after it has been copied to the external flash drive.

22. After the files are saved, this part of the CAT is complete. (Payment information will appear after you start the CAT the next time.)
23. Continue to process the interviews and save them on the external flash drive.
24. When finished with the current submission, send the external flash drive to the ROC. This must be received by the ROC within 30 days or the payment will be reversed.
25. The ROC will complete the audit. If it fails the ROC visual and final duplication audit, you will be notified by email and within the CAT, and you will have 2 weeks to submit a corrected file or the payment will be reversed.
26. When the ROC passes the interview, the process is complete, and the interview will turn green. This will put the interview into an archivable state. After 30 days the interview will be moved into the archive.

The screenshot shows the 'FamilySearch Contractor Audit Tool' interface. At the top left, there is a blue 'Add Interview' button. Below it is a table titled 'Interviews'. The table has columns for Progress, Date Loaded, Interview Date, Interview Folder Name, Interviewer, Interviewee, First Ancestor, Names Submitted, After Cutoff, and Duplicate Names. A single row is visible with a green checkmark in the Progress column, indicating it is complete. The details panel on the right shows the 'Interview Date' as 6/14/2018 1:27 PM and a list of actions: 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, and Complete and Archivable.

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

27. Note: The interviews may be viewed separately by status, or all together.

This image shows a close-up of the 'Showing:' dropdown menu. The menu is open, displaying the following options with corresponding colored squares: 'All' (blue), 'Ready' (red), 'Issues' (dark red), 'In Progress' (grey), 'Payment Requested' (orange), 'Ready To Archive' (green), and 'Rework' (purple).

28. If the ROC fails an interview you will see the Records Operation Center Audit change

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

29. If you click [details] you will see the audit notes entered by the ROC auditor.

**Errors**

Please correct all the errors below and then click Rerun. The interview will then reset to the appropriate step.

ROC Audit failed for interview with GRMS ID 116985:  
 7/15/2019 - Failed 2nd attempt  
 7/14/2019 - Failed 1st attempt

Rerun Save Details Print Details

30. Clicking [rerun] will allow you to process the interview again. Once you relaunch the CAT the status of your 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 Ohenev Akwesi		60	0	59