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USER GUIDE FOR THE EDITING OF QUESTIONNAIRE METADATA WITH COLECTICA QUESTIONNAIRES FOR THE ETHNIC AND MIGRANT MINORITIES QUESTION DATA BANK (EMM QDB)

Inputting questionnaires in the EMM QDB using Colectica Questionnaires

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Introduction

The EMM Survey Question Data Bank (EMM QDB) is a free online service dedicated to questionnaires used in quantitative surveys undertaken with ethnic and migrant minority (EMM) respondents. The EMM QDB collection is available on the Center for Socio-Political Data (CDSP) of Sciences Po's Colectica Portal, under the Series entitled, 'Ethnic and Migrant Minorities Survey Question Data Bank Collection.' Users of the EMM QDB will be able to discover and learn about the different questionnaires, including their specific questions, using the 'Search' and 'Explore' functions of the CDSP's Colectica Portal. As the EMM QDB Collection has been built using Colectica software, all of its questionnaires have been and will be documented to comply with the DDI-Lifecycle metadata standard.

This document explains the steps for using the Colectica Questionnaires software to input a questionnaire. In particular:

NOTE As questionnaires vary, you will need to use your judgment to determine which of the steps above need to be applied to the specific questionnaire you are inputting.

IMPORTANT NOTE Be sure to always use the questionnaire downloaded from the EMM QDB workspace in my 'MyCore' and never one you accessed or located yourself online.

Vocabulary

Colectica uses some specific vocabulary. Please refer to this list if any terms are unclear:

"Code list" – This refers to the list of possible responses for multiple choice questions. There are two components of the "Code list:" a numeric (e.g. 0,1, 99) and a text component (e.g. No, Yes, Refusal).

"Instrument" – This refers to the questionnaire you are creating in Colectica. In this guide, the term "Instrument" is used to differentiate from the study itself or the original questionnaire (which is whatever copy that has been retrieved via MyCore).

"Question item" – This refers to the question (regardless of the question type), including all the information attached to it, such as the "Code list" or interviewer instructions.

Using this guide

As mentioned above, the following guidelines will need to be adapted based on the needs of the questionnaire. This is determined by the structure of the questionnaire itself as well as if questions can be extracted automatically using R programming. Please be sure that you are using the correct steps and in case of questions, please contact the Sciences Po team using the following email address: sshoc.project@sciencespo.fr

Ways to input a questionnaire

A. Inputting a questionnaire from scratch – When the questionnaire has not been extracted from Nesstar or using R programming, you will need to input each and every item from scratch.

B. Inputting an extracted questionnaire – When relevant, we will extract structured text in a questionnaire using a DDI XML file retrieved from Nesstar, or the question text and question label from the questionnaire using R. In these cases, sections 2.1-2.3 will be less pertinent (though you will need to rename questions and you may still need to add new "Question items" as the extraction process is not always perfect). However, you should read section 6 carefully, as the process explained will still be essential for grids.

STOP ***If this is the first time you are using Colectica Questionnaires, please watch this brief demonstration. Note that Colectica Questionnaires will appear slightly different for you because this video was made with an older version of the software. Nevertheless, it serves as a good introduction to the Colectica Questionnaires interface.***

1. Creating and opening "Instruments"

1.1 Creating the "Instrument" for the first time

NOTE: According to the current workflow, a new "Instrument" should not be created using Colectica Questionnaires, as the correct DDI agency can only be assigned using Colectica Designer. As such, **section 1.1 should NOT be consulted or used if you are inputting a new questionnaire**. Section 1.1 has been included for the sole purpose of explaining how a new "Instrument" can theoretically be created via Colectica Questionnaires and, more importantly, explaining how a new "Instrument" will and should be named using an established naming protocol.

1.1.1 Open Colectica Questionnaires

1.1.2 From the welcome page, select "Create a New Survey" to create a new “Instrument” for the questionnaire you will be working on

1.1.3 You will be prompted to generate a label for this new “Instrument." The naming convention for the “Instrument” label will be the full name of the survey/study,[1] followed by its 3-letter survey code in parenthesis, plus the questionnaire language in ISO 693-3. If additional information is necessary to identify the questionnaire within the survey, it should be added using the following convention:

SurveyTitle (3-LetterSurveyCode) *Year*[2] - *StudyLocation*[3] - *TargetPopulation* - **Language**[4]

ex: **LOCALMULTIDEM (LMD)** - *Barcelona* - *Immigrant's Questionnaire* - **SPA**

NOTE: Objects in **BOLD** are obligatory, whereas objects in *italics* should only be included if they are necessary to identify the questionnaire from other versions of the same questionnaire from the same survey (such as two different questionnaires for the immigrant and reference population).

1.1.4 Once you have generated the label, click "Create"

[1] In cases where the survey/study name is exceptionally long and a clear/unique survey/study acronym exists (e.g. LOCALMULTIDEM), the survey/study acronym can be used instead of the survey/study name.

[2] Year should only be included if it is a longitudinal or repeated cross-sectional survey (e.g. ESS, LFS).

[3] StudyLocation refers to the location (usually city, region, or country) in which the questionnaire you are entering was used. This should be used in studies such as LOCALMULTIDEM with multiple sub-national locations with different questionnaires. For master questionnaires, the study location should be identified as ‘Master.’

[4] ISO 693-3 should be used for Language. For multilingual questionnaires that will be captured through a single "Instrument" and for which there is one main language (e.g. Spanish for ICS Madrid), the main language of the questionnaire should be used; however, for multilingual questionnaires also captured through a single "Instrument" but for which there is no main language, then instead of a language code the following term should be used: MULTILING.

1.2 Opening an "Instrument" that has already been created

1.2.1 Open Colectica Questionnaires

1.2.2 From the welcome page, go to the "Home" tab (of the ribbon or toolbar found at the top of the page) and click on "Open from Repository"

NOTE: If an "Instrument" has already been opened on your machine and only the local machine houses the latest version, you can open the "Instrument" by clicking on "Open a Survey" or by going to the "Home" tab and then clicking on "Open"

1.2.3 A list of surveys will appear in a new window called "Select "Instrument."" Check that in the most left-hand column, the pre-production portal identifier (i.e. colecticapprd.cdsp.sciences-po.fr) is being displayed. Then select the "Instrument" you wish to open and click "Select" at the bottom of the window

1.3 Verifying the language

1.3.1 Inside the new "Instrument," click on the "Settings" icon in the top toolbar (in the "View" section) to see your language settings of Colectica Questionnaires

1.3.2 ****FOR QUESTIONNAIRES IN A SINGLE LANGUAGE****

1.3.2.1 Ensure that the language of the questionnaire (displayed in ISO 639-1) is listed in the language box. If needed, add the language of the questionnaire by clicking on the "+" sign, then locating the language to be used in the provided pop-up menu, and finally clicking "Add"

NOTE: For languages that have multiple language codes (e.g. "en" for English in general, "en-US" for English from the US, "en-GB" for English from the UK), select the code for the general version. For instance, for English, you would use "en" and NOT "en-US" or "en-GB".

1.3.2.2 Delete any unnecessary language(s) if applicable

1.3.3 ****FOR MULTILINGUAL QUESTIONNAIRES WHERE THE LANGUAGE VARIATIONS HAVE BEEN CONTEXUALIZED DIFFERENTLY (e.g. LOCALMULTIDEM Geneva)**[5]

1.3.3.1 Such multilingual questionnaires will be documented so that each language is its own "Instrument" (e.g. one "Instrument" for the French version of the LOCALMULTIDEM Geneva questionnaire and another "Instrument" for the German version of the LOCALMULTIDEM Geneva questionnaire). On your end, you will need to ensure that only the language you have been assigned to work on (i.e. the language used as part of the "Instrument" name) is listed (in ISO 639-1) in the

[5] Specifically, this means that the different language versions have adapted their questions to be contextualized to their respective target respondent group. And given that the language versions for such questionnaires are NOT exact translations of one another, each language version is inputted as its own "Instrument." When initially creating the blank "Instrument" in Colectica Designer, the "Description" field for the "Instrument" (i.e. the space where you can provide metadata at the "Instrument"-level) will therefore be populated to explain why each language version is its own "Instrument" and how one can find and view the different language versions.

language box. If needed, add the language of the questionnaire by clicking on the "+" sign, then locating the language to be used in the provided pop-up menu, and finally clicking "Add"

NOTE: For languages with multiple language codes (e.g. "en" for English in general, "en-US" for English from the US, "en-GB" for English from the UK), select the code for the general version. For instance, for English, you would use "en" and NOT "en-US" or "en-GB".

1.3.3.2 Delete any unnecessary language(s) if applicable

1.3.4 **FOR MULTILINGUAL QUESTIONNAIRES WHERE THE ONLY DIFFERENCE AMONGST THE LANGUAGE VARIATIONS IS THE LANGUAGE**[6]

1.3.4.1 You will need to input text for all of the languages in which the multilingual questionnaire is available for the following items:

- Every question to the respondent, interviewer(s), and coder(s) (e.g. post-interview assessment questions)
- Instructions to the respondent, interviewer(s(, and coder(s)
- "Code lists" for multiple-choice questions
- Statements

To do this, you need to make sure that in your language settings of Colectica Questionnaires you list first the main language (if applicable)[7], followed by all the (other) languages of the questionnaire in alphabetical order based on language code (in ISO 639-1). If any languages need to be added, complete the following steps for EACH missing language: click on the "+" sign, then locate the language-to-be-used in the provided pop-up menu, and finally click "Add"

NOTE: For languages with multiple language codes (e.g. "en" for English in general, "en-US" for English from the US, "en-GB" for English from the UK), select the code for the general version. For instance, for English, you would use "en" and NOT "en-US" or "en-GB".

1.3.4.2 Delete any unnecessary language(s) if applicable

1.3.4.3 Once you have finished configuring the language settings, as outlined in 1.3.4.1-1.3.4.2 above, you will need to apply the following steps each time you need to input text for a question, instruction, "Code list," or statement:

- In the text box, input the text for whichever language has been selected to be displayed first (in the language settings)

[6] When initially creating the blank "Instrument" in Colectica Designer, the "Description" field for the "Instrument" (i.e. the space where you can provide metadata at the "Instrument"-level) will be populated to explain that the "Instrument" contains or covers all the language variations. If needed, the "Description" field will also include any explanations related to any modifications/enhancements made to any of the language variations, as well as any annotations or in-house translations we have done throughout the "Instrument."

[7] You will know if your multilingual questionnaire has a main language by looking at the name of the "Instrument." This is because multilingual questionnaires with NO main language will have the language in the "Instrument" name listed as MULTILING.

- Click on the language code for the language that is being displayed first, which is found directly to the right of the text box
- A new window will appear where text boxes for all the other languages will be displayed. In each of the language text boxes, input the text for the corresponding language. For example, if the questionnaire is also in German, Arabic, and Spanish, you need to input the German text in the German language text box ("de"), the Arabic text in the Arabic language text box ("ar"), and the Spanish text in the Spanish language box ("es")

In cases where some translations are missing or incomplete for one or more languages in which the questionnaire is available, please alert the Sciences Po team (sshoc.project@sciencespo.fr). You and the Sciences Po team will then discuss and determine how missing translations should be handled. As a **general rule, though**, in situations where we have at least 80-90% of the questionnaire provided in a language for which the person that is documenting the “Instrument” (or someone else from the Sciences Po team) is a native or sufficiently proficient speaker, we should make efforts to complement translations if/when they are incomplete and provide full translation for each of the questionnaire’s items (e.g., questions, instructions, response categories, statements). However, we will need to be proportionate and keep in mind time and human resources limitations. Hence, practical considerations as to how many languages this involves and how many questionnaire items need to be translated will need to be considered. For example, if a given “Instrument” has been translated into 5-6 different languages and all are incomplete (e.g. not including translations for instructions or other contextual statements such as routing/filtering), we will not make this effort for all languages and prioritize having a full version in at least English. In other cases where the portion of the language translations is much lower, translation work is not feasible as we can only devote a small amount of time to translating multilingual questionnaires.

Scenario 1: Incomplete translations

Suppose, for example, that out of a full "Code list," 1-2 response categories are not available in a language, and the person inputting the “Instrument” is sufficiently proficient in both the language of the original questionnaire AND the language for which we need to provide the translation. In that case, we should try to complete the translation. If instead, completing the translations of the response categories would duplicate the time for documenting the “Instrument,” then we should not engage in completing all missing translations.

Scenario 2: Available translation does not sufficiently match the text of the original questionnaire

Suppose the person inputting the “Instrument” (who is sufficiently proficient in both the language of the original questionnaire AND the language for which we need to provide translation) spots that the available translation for some “Question items” is quite different and does not sufficiently match the text of the original questionnaire. In such a case, we should make efforts to provide a more faithful translation to better match the formulation of the original questionnaire’s question items if this can be done within reason (e.g. it does not duplicate the time taken to input the questionnaire). We will also need to judge whether the mismatch is due to a 'poor' linguistic translation or due to other situations (e.g. the translations provided were not done from the primary language used for fieldwork in that location but from a generic master/core questionnaire for the overall study in a different language, as in the case of ICS).

When we provide in-house translations for any of the items included in the original questionnaire, we also need to provide information at the **instrument-level metadata** for which type of items translation was provided by our team. In addition, in those cases where we made major changes to the available translation text provided by the data producers or polling institutions, we should also include a relevant note at the **question-level metadata** about that. Such notes should be included in the “Description” box of the "Metadata" section (or in the same text box being used to input the provided/enhanced translation in the case of "Statement Text" items) and should state something along these lines: "The (language) translation was provided/enhanced by the CEE team of Sciences Po to better match the formulation found in the original questionnaire."

2. Inputting "Question items"

NOTE: This section applies to "Question items" that are NOT a part of a question or choice grid. Questions for the interviewer (e.g. post-interview assessment questions) should be inputted as "Question items" with the exception of filtering questions (for instance those found in ICS Madrid) which need to be captured as “Statement Text.” If you are unsure as to whether a "Question item" should follow the guidance in this section or not, please contact the Sciences Po team (sshoc.project@sciencespo.fr).

2.1 Adding a new "Question item"

2.1.1 To add a new "Question item," click the "+" in the green circle at the bottom right-hand side of the page

2.1.2 A window will appear with different options. To input a new question, you should only use one of the options in the "Standard Questions" box. You will need to select the appropriate question type based on the "Question item" in the questionnaire. If you select the wrong type, you will need to delete the "Question item" and create a new one, as it cannot be changed once it has been created

2.1.2.1 Multiple Choice: This is the most common question type. Use multiple choice for all questions which give a closed set of answers, typically in the form of a response list

2.1.2.2 Text Entry: Use this question type when respondents are able to give an open, non-numeric response to a question. For example, a question that asks respondents to name the newspaper they read would be a text entry

2.1.2.3 Numeric Entry: Use this question type when respondents are asked to give an open, numeric response to a question. For instance, a question that asks respondents how many people live in their household would be a numeric entry

2.1.2.4 Date: Use this question type when respondents are asked to give a precise date in response to the question. This is not a common question type but is often used as a quality control to record the date for the interview

2.1.2.5 Time: Use this question type when respondents are asked to give a time (such as what would be read on the clock). Like the date, this question type is not common but may be used as a quality control

NOTE: If unsure which question type should be selected, please refer to Appendix A. If you are still unsure, please contact the Sciences Po team (sshoc.project@sciencespo.fr) for clarification. Please also note that if the question is more than one response type (e.g. numeric entry plus multiple choice), please refer to section 2.2.

2.1.3 Once you have created the "Question item," a window will appear to allow you to input the question metadata.[8] First, enter the question name in the first box marked "Name"

2.1.3.1 Naming Convention for Question Names- The basic naming convention is as follows.

3-LetterSurveyCode
Year-*StudyLocation*-*OtherIdentifyingInfo*-**Language**-**QuestionTitle**

ex: LMD-*Lyon*-FRA-Q1 ; LMD-*Barcelona*-*Immigrant*-SPA-Q1

NOTE: Objects in **BOLD** are obligatory, whereas objects in *italics* should only be included if they are necessary to identify the questionnaire from other versions of the same. For all objects except QuestionTitle, they should also already be displayed/mentioned as part of the "Instrument" name.

2.1.3.1a 3-LetterSurveyCode refers to the 3-letter acronym for the survey. A comprehensive list of 3-letter acronyms can be found in the Questionnaire Tracker

2.1.3.1b Year should always be included if the questionnaire is part of a longitudinal or repeated cross-sectional survey (e.g. ESS2008 for the 2008 questionnaire of ESS)

2.1.3.1c StudyLocation refers to the location (usually city, region, or country) in which the questionnaire you are entering was used. This should be used in studies such as LOCALMULTIDEM with multiple sub-national locations with different questionnaires

- If there are two or more subnational regions in the same country with the same questionnaire, the location should be the country if it is a cross-national study. If no other countries participated, there is no need to specify the country
- For master questionnaires for cross-national surveys such as the ESS, put Master rather than a location

2.1.3.1d Other Identifying Info only applies if the 3-LetterSurveyCode, StudyLocation, and Language are insufficient to uniquely identify the question. If this situation occurs, let the Sciences Po team (sshoc.project@sciencespo.fr) know if you have any doubts about how to name the question

2.1.3.1e Language- The language of the questionnaire should be indicated using ISO 639-3

2.1.3.1f Question Title refers to the question title or number as it appears in the questionnaire. For instance, RS0, Q3, B1a. If you encounter a questionnaire with no numbering/naming system for questions, contact the Sciences Po team

[8] If you are on the main view (i.e. "Design" on the upper toolbar) and you need to get back to this window after the "Question item" has been created, you can do so by clicking on the small pencil that is located at the bottom right- hand corner of the blue box that appears to the left of the question text.

(sshoc.project@sciencespo.fr) for further instructions. In cases where the number or name of one or more question items is missing, but you have access to the survey dataset, dataset syntax or codebook, please use the identifier/label attributed to that specific variable in one of the aforementioned files

2.1.4 In the second box marked "Question," you will input the question text. This is all the text that appears on the questionnaire or is understood to be read by the interviewer to the respondent. This does not include instructions to the interviewer, instructions to the respondent (for PAPI), or general statements made at the beginning of a question block (i.e. "Now I will ask questions about what you like to do in your free time.")

2.1.5 Add instructions to the interviewer or the respondent, if any, to the box marked "Instructions." These should appear exactly as they do in the questionnaire. If there are multiple instructions for a "Question item," add each with a line break between each. Instructions about skipping or asking questions based on specific responses to the question should NOT be included here; instead, please follow the instructions in 2.1.5.1 below

2.1.5.1 Instructions about skipping or asking questions based on specific responses to the question should be inputted into the "Description" box of the "Metadata" section preceded by the text: '*POST-RESPONSE CATEGORY ROUTING*'. To ensure proper display of such instructions, you will need to input a line break between each line of text

ex:
POST-RESPONSE CATEGORY ROUTING:

1 Yes → Q5

2 No → Q8

2.1.6 Leave the question label ("Label") blank

2.1.7 Whenever an in-house translation is obtained or enhanced and subsequently inputted for a "Question item," the Description" box of the "Metadata" section will need to be filled out to signpost that the English translation cannot be found in the original questionnaire. Specifically, it should state something along these lines: "The (language) translation was provided/enhanced by the CEE team of Sciences Po to better match the formulation found in the original questionnaire."

2.2 Questions with more than one response type

You may encounter questions that are text or numeric based, but include a code for certain categories such as "Don't know" or "Refusal," as previously mentioned in section 2.1.2. In this case, there is no simple solution for inputting these codes via Colectica Questionnaires. You should use the following steps in these cases:

2.2.1 Select the main question type and input the question as normal

2.2.2 Go to the [Revision Tracker]() and input information on the "Question item" that needs codes to be added. In particular, be sure to include the questionnaire name, the question name, and the exact text and numeric values for each of the response items

2.2.3 Someone from the Sciences Po team who is trained in using Colectica Designer will use this software to add the "missing" codes only after you have finished inputting all the questionnaire items using Colectica Questionnaires

2.3 Copying "Question items"

NOTE: Sometimes, you will be entering multiple similar "Question items." In these cases, you may reuse those "Question items" by making copies. **ALWAYS make copies of "Question items" using these exact steps.** If you do not properly copy the "Question item," it will mean that any alteration made to the "Question item" is made everywhere that the "Question item" is used. Also, **only copy questions that have the same "Code list" (including language versions) and come from the same questionnaire you are working on** to avoid bugs that have been previously experienced and spotted when testing this copying function of Colectica Questionnaires

2.3.1 Add a new item by clicking on the green "+"

2.3.2 In the window that appears, refer to the bottom section labeled "Repository." Select "Question." A window will appear with a list of questions

2.3.3 Select your question from the list. This list can be very long, so you may want to use the search bar to look for your question. Type the question name to search for it

2.3.4 When you have found your question, click on it. On the right-hand side of the window, you will see the question text and the "Instrument"(s) (or survey) in which it appears. The survey you are currently working on should appear under "Instruments." If this field is empty or if a different survey appears under "Instruments," DO NOT PROCEED

2.3.5 Once you have verified that this is the correct question and that it appears only in the survey you are currently working on, add it by clicking the "Select" button in the bottom right of the window

2.3.6 You will now have two identical "Question items." If you click on the edit option for either of these questions, you will see a green banner that tells you "This question is used in *n* places." DO NOT MAKE ANY CHANGES TO THE QUESTION AT THIS STAGE

2.3.7 Refer to the "Question item" you have just added to the "Instrument." In the blue box, in the right-top corner, there will be three vertical dots. Click on these dots and select "replace This Item With a Copy" from the menu that appears

2.3.8 A window will pop up with an "Item Copied" message. Click "OK"

2.3.9 Open the editing window for the question you have just copied. Verify that there is no green banner informing you that the question is being used in more than one place

2.3.10 Change the Question Name. The Name should be exactly as it appears in the questionnaire[9]

2.3.11 Alter the question text and, if necessary, the instructions

2.3.12 Alter the question label

2.3.13 Before closing the editing box, ensure that the Question Name has been changed

[9] For grids, see Section 6 for labeling grids.

3. Inputting "Code lists"[10] (responses) for multiple-choice questions

NOTE: This step is only necessary for multiple-choice questions. It should be completed for EVERY multiple choice "Question item."

3.1 Common steps for new and existing "Code lists"

3.1.1 In an existing multiple choice question, navigate to the "Response" tab at the top of the window

3.1.2 Choose a "Selection Style" in the dropdown menu based on the number of responses that may be selected. The default is "Select one." Be sure to change this to select all that apply or "Select up to…" where appropriate

3.1.2.1 If the question allows respondents to select up to a certain number of responses, the number will need to be indicated using the + and – signs that will appear next to the "Selection Style" box

3.1.3 Choose the appropriate "Display Style" based on how the "Code list" is displayed in the original questionnaire

3.1.4 Leave all other settings at their default

3.2 Creating a new "Code list"

You will need to **create a new "Code list" for each unique set of response options** that appear in the questionnaire. In cases of very similar but not identical response options, you may wish to use the process described in step 3.4 Copying an existing "Code list", rather than 3.2 Creating a new "Code list." Nevertheless, please read 3.2-3.4 carefully in their entirety before creating your first "Code list"

3.2.1 In the "Choices" section, select the option "Create a new "Code list."" A new window will appear

3.2.2 In the "Codes" section, input each response option by typing the response text into the label box on the bottom left of the window. Be sure to type in the box immediately to the left of the blue "+". If there is no response text to be inputted (such as a Likert scale going from 0-10), simply put the numbers in the label box (e.g. 2-2, 3-3)

3.2.3 Check the numeric value box on the left-hand side at the bottom of the window. By default, the first response option will receive the value of 1. However, this can be changed to reflect the numbering system of the "Code list" (for instance, if the values start from 0 or if options such as refusal read with 9 or 99).

Some key points to keep in mind:

- If the "Code list" has not assigned any numeric values, consult and use the numbering system used in other very similar multiple choice questions from your questionnaire (e.g. If in one question, the "Code list" was 1. Yes, 2. No, 9. DK, 99. Refusal and the question you are working on has the same exact "Code list" with just DK missing the numeric value, then you can use 9 as the numeric value for DK)

[10] "Code list" is the term used by Colectica to refer to the closed answer options in multiple choice questions.

- If the numbering system for a "Code list" uses a number more than once (usually this is just a typo in the questionnaire), you will need to assign a new number to the duplicate number (e.g. 1. Yes, 1. No would be changed to 1. Yes, 2. No); this is because Colectica Questionnaires does not allow a number to be repeated in a "Code list"
- If there are any response options which purposely have been assigned some labels instead of numeric values (e.g. 'SPA' for Spanish instead of a numeric code), keep in mind that you still need to assign a number provisionally to that specific response option till you are able to correct it with the label assigned in the original questionnaire through Colectica Designer; this is because, in Colectica Questionnaires, it is mandatory to assign a numeric code to ALL response options before exiting the "Code list"

3.2.4 Once the value and the response text are correct, add the response option by clicking the blue "+" or clicking enter. The answer option will appear in the gray box, immediately under the word "Codes"

3.2.5 Repeat this process for each response option. Before entering a new response option, be sure that the last one appears in the gray box. Be sure before exiting that the final response option has been added to the "Code list"

3.2.6 If any of the "Code list" items have routing instructions (e.g. 1.Yes → Q10), DO NOT include them as part of the "Code list" item. Instead, input the routing instructions into the "Description" box of the "Metadata" section (found on the "Question" tab when viewing a question for editing). Specific instructions on how to do this can be found in 2.1.5.1 above

3.2.7 Create a "Label" for the "Code list" by typing it directly into the "Label." The "Label" should be written to include the 3-letter survey code assigned to your questionnaire, followed by the year, study location, questionnaire language and/or target population, and then followed by either keywords or response categories[11] of the "Code list." The specific format to be used and objects to be included in the label, as a bare minimum, depend on which of the following scenarios has occurred:

Scenario 1 - single year single location survey:
3-LetterSurveyCode-Language-*keywords*/*response categories*
ex: EXP-FRA-Yes/No

Scenario 2 - single year multi-location survey:
3-LetterSurveyCode-StudyLocation-*keywords*/*response categories*
ex: LMD-London-migration reasons

Scenario 3 - multi-year single location survey:
3-LetterSurveyCode Year-*keywords*/*response categories*
ex: LIA 2010-oui/no/refus

Scenario 4 - multi-year multi-location survey:
3-LetterSurveyCode Year-StudyLocation-*keywords*/*response categories*
ex: ESS 2008-France-gender

[11] Response categories should only be used if the "Code list" is short (e.g. Yes, No, DK, Refused).

Scenario 5 - survey (single or multi-year and single or multi-location) where within a single location there are different/adapted questionnaires for the different respondent groups:
Use format for relevant 1-4 scenarios, with target population information inserted before keywords or response categories (...-**TargetPopulation-***keywords*/*response categories*)
ex: LMD-Barcelona-Arabic-10 point scale

NOTE: Objects in **BOLD** are obligatory; objects in *italics* are identifying information for you to select as the most appropriate object to be used

As a reminder, the main objective of the “Label” is to facilitate your re-use of the "Code list" within Colectica Questionnaires

3.3 Reusing an existing "Code list"

3.3.1 In the choices section, select "Use an existing Code list.” A window will appear with a list of "Code lists"

3.3.2 Select the "Code list" you wish to use from the list. You can use the scroll bar or search by the "Code list" label using the search bar

3.3.3 When clicking on the "Code list," a list of questions that use this "Code list" will appear on the right-hand side of the window. Verify that this is correct before continuing

3.3.4 Once you have selected the correct "Code list", click on "Select." The "Code list" will now be attached to the "Question item." You should be able to see the complete response list in the "Choices" section now

NOTE: If you reuse an existing "Code list," DO NOT change this "Code list." It will change it for all "Question items" using this "Code list." If you need to make minor modifications, create a copy (see 3.4 below). If you notice a typo AND you created the "Code list," you can edit it. If you notice a typo in a "Code list" you did not create, email the Sciences Po team (sshoc.project@sciencespo.fr) to let her know

3.4 Copying an existing "Code list"

You may encounter very similar "Code lists" and wish to make a copy to save time. You should be VERY careful when doing this to ensure that you do not alter an existing "Code list."

3.4.1 Complete all steps in 3.3

3.4.2 After completing 3.3.4, you will see a black bar that reads "This "Code list" is used *n* times." With the option "Create a Copy" directly beside it in blue. Click "Create a Copy"

3.4.3 A notification window will appear to tell you the "Code list" has been copied. Click "OK." The black box should now indicate that this "Code list" is used 0 times. Verify that this is the case before proceeding

3.4.4 Select "Edit Code list." The window to edit the "Code list" will appear

3.4.5 Before making ANY changes to the codes, you must change the “Label” in the “Description” box at the top of the window. This is very important in order to avoid having two different "Code lists" with the same names. The “Label” should be written following the protocol described in 3.2.7 above

3.4.6 After you’ve changed the “Label," you can edit the "Code list" by adding a new item. You can also remove items by right-clicking on them or alter the text of an existing code by clicking on it and changing the text in the Label box on the right-hand side

3.4.7 Before closing the window, verify that you have changed the “Label." It is very important to avoid having two different "Code lists" with the same “Label”

3.5. Adding an "Other" option

Often, multiple choice questions will have an "Other" option which will ask respondents to provide an extra specification. Use these steps to add this option when it applies

3.5.1 After adding the "Code list," go to the "Other" box below the "Choices" box

3.5.2 From the dropdown menu, select the "other" response option

4. Sequences

“Sequences” create sub-groups of questions. You will need to create “Sequences”, particularly when dealing with grids (see section 6) and when working with a questionnaire with clear section headings/divisions (for example, the ICS master questionnaire)

4.1 Creating the “Sequence”

4.1.1 Create a new item using the + in the green circle at the bottom right-hand side of the page

4.1.2 In the "Structure" section, select "Sequence." A new window will appear with metadata for the Sequence you have just created

4.1.3 Erase the text which reads "New Block" in the “Label” box. Name the “Sequence” according to the following convention:

4.1.3.1 <u>For question grids-</u> The “Sequence” should follow the same naming convention as a "Question item," but it will not include the line information. In other words, it would resemble: LMD-Lyon-FRA-Q13

4.1.3.2 <u>For other “Sequences”-</u> If the questionnaire uses blocks, these can be organized into “Sequences” as well. You should use the same naming convention as for “Question items,” but instead of the “Question Title” at the end, you use the name of the block given in the questionnaire. Before doing this, check with the Sciences Po team (sshoc.project@sciencespo.fr) that it is appropriate to use a “Sequence” in this situation

4.1.4 Do not add any text to the “Description” box

4.1.5 Close the “Sequence”

4.2 Navigating in and out of the "Sequence"

4.2.1 To add "Question items" or "Statement" texts to a "Sequence," you will need to navigate inside it. To do this, click on the blue arrow beside the "Sequence" name (to the left of the blue box). Please note that for question grids, more detailed guidance is provided in the section below

4.2.2 Once you are inside of the "Sequence," you can add items in the same process as you normally would. Refer to Sections 2 and Sections 5 for how to add questions and statements

4.2.3 Once you have added all items that should be part of the "Sequence," you must return to the full survey. The easiest way to do this is to navigate to the tabs in the top left part of the screen, directly under the toolbar. Select the tab with the name of the survey (the one you created when you created the survey). This will return you to the first screen. You should now be able to see that the number of items in your "Sequence" has been updated.[12]

<u>*NOTE*: Sometimes, you will be entering multiple similar "Sequences." In these cases, you must create a **new sequence** for each one of them. You may reuse those "Question items" from previous questions, but making copies of entire sequences leads to bugs, even when a copy of the sequence has been made.</u>

5. "Statement Texts"

Sometimes, you may need to include a "Statement Text." This is a) text not part of or specific to a question that is intended for the respondent to read/hear (for example, to explain to the respondent a block of questions that they will be asked) OR is b) text intended for the interviewer (for example, reminding them to ask all remaining questions in a given section of a questionnaire or reminding them to only ask a question if a certain response was given for a preceding question).

<u>*NOTE*: Filter questions for the interviewer, like those found in ICS Madrid, will need to be documented as "Statement Text" and NOT as "Question items." Moreover, for question grids, the common text for a question grid should be documented as "Statement Text", as described in section 6 below.</u>

5.1 Creating a "Statement Text" from scratch

5.1.1 Click on the green "+" that allows you to add an item

5.1.2 In the first section "Static Content," select "Descriptive Text"

5.1.3 Type or paste the text into the box labeled "Statement Text"

5.1.4 Name the "Statement Text". If the text being inputted into "Statement Text" has identifying information in the original questionnaire (e.g. "Instructions for the interviewer to read"), then use this as the name. If no identifying information is available, then name the "Statement Text" as follows: 3-LetterSurveyCode-Language-Keywords (e.g.

[12] Sometimes, when making changes to questions, those changes will not be visualized in the global view (after you close the editing window). If you leave the "Sequence" then return to it, normally you should be able to see those changes reflected (such as changing the name of a question).

LIA-FRA-Instructions for coders). If needed, Location can be added in between the 3-LetterSurveyCode and Language (e.g. ICS-Madrid-SPA-Interviewer instructions)

5.2 Copying "Statement Texts"

<u>*NOTE*: Sometimes, you will be entering multiple similar or identical "Statement Texts." In these cases, you may reuse those "Statement Texts" by making copies. **ALWAYS make copies of "Statement Texts" using these exact steps.** If you do not properly copy the "Statement Text," it will mean that any alteration made to the "Statement Text" is made everywhere that the "Statement Text" is used.</u>

5.2.1 Add a new item by clicking on the green "+"

5.2.2 In the window that appears, refer to the bottom section labeled "Repository." Select "Descriptive text." A window will appear with a list of questions

5.2.3 Select your “Statement Text” from the list. This list can be very long, so you may want to use the search bar to look for your question. Type the name of the “Statement Text” to search for it

5.2.4 When you have found your “Statement Text,” click on it. Contrary to “Question items,” the field on the right will be empty

5.2.5 Once you have verified that this is the correct “Statement Text,” add it by clicking the "Select" button in the bottom right of the window

5.2.6 You will now have two identical "Statement Texts.” Contrary to “Question items,” if you click on the edit option for either of these “Statement Texts,” you will NOT see a green banner that tells you "This question is used in *n* places." However, any changes made WILL be copied to all other versions of the “Statement Text.” DO NOT MAKE ANY CHANGES TO THE “STATEMENT” AT THIS STAGE

5.2.7 Refer to the "Statement Text" you have just added to the "Instrument." In the blue box, in the right-top corner, there will be three vertical dots. Click on these dots and select "Replace This Item With a Copy" from the menu that appears

5.2.8 A window will pop up with an "Item Copied" message. Click "OK"

5.2.9 Open the editing window for the “Statement Text” you have just copied

5.2.10 Change the “Name” according to instructions in 5.4

5.2.11 Alter the “Statement Text”

5.2.12 Before closing the editing box, ensure that the “Name” has been changed

6. Question Grids

You will often see choice and question grids in a questionnaire. Common formats are household grids and choice grids where respondents indicate their position on a Likert scale for a number of items. **Colectica Questionnaires provides an option for creating these types of question grids, but we will not use them. Instead, each item within the question grid should be treated as an individual "Question item." Each of these "Question items" should then be collected within a “Sequence.”**

6.1 Creating a new “Sequence”

6.1.1 Create a new “Sequence” for the question grid

6.1.2 Name the “Sequence” using the same naming protocol for "Question items"

6.1.3 Navigate inside the “Sequence”

6.1.4 The first item of the “Sequence” should be the common text. Add the common text of the question grid as a "Statement Text". Name the "Statement Text" using the name of the “Sequence”

<u>*NOTE*: While in the "Flowchart" view of a questionnaire on the Colectica Portal, only a single language is displayed for items inputted as "Statement Text," the different language versions are displayed via the "Summary” view. As such, if you are working on a multilingual questionnaire where all the languages are being inputted into a single "Instrument" (e.g. ICS Madrid), you need to make sure that you input the common text in all of the available languages.</u>

6.1.5 If there is any introductory or instructional text associated with the overall question grid (i.e. text that is not specific to a specific item within a question grid), add this to the "Statement" text created in 6.1.4, either before or after the common text based on the placement being used in the original questionnaire. Otherwise, include the introductory or instructional text in the "Instructions" field for the specific question grid item (as each item in the question grid, as explained in more detail below, will be captured as its own "Question item")

6.1.6 For each item of the question grid, create a corresponding "Question item." In other words, for any item that the respondent must respond to, there should be a question

6.1.7 Add the question name to the "Question item" you created in 6.1.6. The question name should reflect as close as possible the name given in the questionnaire while also being unique. As a result, you may need to add an identifier to distinguish one item of a question grid from another, as the questionnaire may not distinguish between items. The process for doing this is quite simple:

6.1.7.1 If there is any identifying information for the question grid item (usually numbers or letters), use the full question name followed by an underscore (_) and then the identifying information (e.g. Q1_A, Q2_1)

6.1.7.2 If there is no identifier, consult the dataset, dataset syntax or codebook that corresponds to the questionnaire to find the identifiers used for the question grid items. In cases where the dataset, dataset syntax and codebook are not available, or they do not provide information about how the question grid items have been identified, then use the identification protocol used for other question grids in your questionnaire (e.g. if a previous question grid used A, B, C, etc. to name/identify the items from the question grid, you can use A, B, C, etc. for the question grid you are working)

6.1.8 As for the question text, input the text specific to the question grid item. For example, if the common text is "Have you ever felt discriminated against when visiting…" and the text for the first question grid item is "the hospital," you would input "the hospital"

6.1.9 In the "Instructions" field, add all instructions that are specific to the item of the question grid

6.1.10 For each item in the question grid, add the appropriate "Code list" (see Section 3)

6.1.11 Once all items have been added, navigate out of the “Sequence”

6.2 Reusing questions and "Code lists" for grids

Because grids will usually have the same "Code list," you may find it useful to copy the same question. Here is the process you should use to do this

6.2.1 Create a base question. The question name should contain the question name without a row identifier (i.e. Q1_)

6.2.2 Add the "Code list" for the question grid. SKIP THIS STEP IF "Code lists" VARY (e.g. Household girds)

6.2.3 Without adding any other information to the base question, add a new item that is a re-use of the base question

6.2.4 Replace the "Question item" you’ve just created with a copy

6.2.5 Open the copied question and verify that there is no green banner at the top. Then, rename the question starting with the **second row** of the grid (i.e. Q1_B). Always start with the second row

6.2.6 Alter the question text to include any row-specific text

6.2.7 Repeat steps 6.2.4-6.2.6 for each row in the grid except the first row (item A)

6.2.8 Once all rows have been added, return to the base question and open the editing window. There should be no green banner indicating that the question is used in multiple places. If there is, you will need to locate the duplicate to fix the issue

6.2.9 Once you have verified there are no duplicates, alter the base question so that it becomes the question asked in the first row of the grid

6.2.10 Double-check that the correct "Selection Style" is being used

6.2.11 Select the appropriate "Display Style" as this specific metadata does not auto-populate when reusing a question. Please remember that the "Display Style" selection is based on how the "Code list" is being displayed in the original questionnaire

6.2.12 Double check that the "Code list" is carried over properly

IMPORTANT NOTE*DO NOT FOLLOW STEPS IN 6.3 DUE TO ONGOING BUGS. IF YOU WANT TO RE-USE A QUESTION AND "CODE LIST" BUT NEED TO SLIGHTLY MODIFY THE "CODE LIST" (THIS INCLUDES ADDING/CHANGING LANGUAGES), YOU MUST CREATE THE QUESTION FROM SCRATCH.*

6.3 Altering "Code lists" in duplicated questions

In some cases, the "Code lists" may vary slightly within a grid. For instance, some rows may include a "Not applicable" option while others do not. If you encounter this, use the following steps to ensure that the "Code lists" are correct

6.3.1 After completing all steps in 6.1, navigate to the first "Question item" with a different "Code list" and open the editing window. Go to the Responses tab

6.3.2 There should be a black banner under the "Choices" section informing you that the "Code list" has been used *n* times

6.3.3 Select "Create a Copy." Click "OK" on the notification window that appears. Verify that the "Code list" is now used 0 times according to the black banner

6.3.4 Follow the steps in 3.4 to edit the "Code list." Take special care to change the name of the "Code list"

6.3.5 Repeat the steps as many times as necessary if there are more than two unique "Code lists"

6.3.6 For any other "Question items" in the grid that use the altered "Code list" you've just created, open the editing window and go to the "Response" tab

6.3.7 This "Question item" will still have the base "Code list." Select "Don't use this "Code list."" This removes the "Code list" from the "Question item"

6.3.8 Following the same steps as section 3.3, add the correct "Code list" to the "Question item"

7. Conditional Question Logic

For conditional logic, you will include or input as instructions any simple instructions on when to skip or ask questions, including simple programming language. However, if there is any complex programming language (intended for a computer) in the questionnaire that is also not about generating new variables, you should use this step to input this information

7.1 Once you have completely inputted the question, click on the three dots to display the menu. Click on "Add Display Logic"

7.2 A new window will appear with a dropdown menu. Select the previous question(s) that determine whether or not the question displays

7.3 Select the logical conditions necessary for a question to display. For instance, if Q1 is no or if Q2 does not equal yes

<u>*NOTE*: Sometimes, display logic can be tricky and may require you to think critically because of the way it is explained in the questionnaire. Be sure to think about the logic for the question display. If you run into any issues, feel free to reach out to the Sciences Po team (sshoc.project@sciencespo.fr) for guidance</u>

8. Creating an "Instrument" which is similar to another already created through Colectica Questionnaires

You may want to create a new "Instrument" which may be very similar to another already created through Questionnaires (e.g. ICS Madrid for inputting ICS Barcelona). In this case, you can leverage the old "Instrument" to speed up the documentation process (using the same example, ICS Madrid is the old “Instrument”). Unfortunately, there is no simple solution such as cloning the whole old instrument and, subsequently, making amendments to it for creating the new “Instrument.” You still need to create each item of the new questionnaire one by one. However, you can still save a significant amount of time by adopting the following tips below:

8.1 Start by going through the new questionnaire and mark up in red the text that is new or different compared to the old/existing instrument

8.2 Use the Colectica Portal (particularly the “Flowchart” and “Summary” views) to consult the structure of the old “Instrument” (e.g. Descriptive texts, types of “Question items”, beginning and ending of each “Sequence”). You can then copy the names of the corresponding items of the old instrument that you need to use to create the new instrument

8.3 Make sure to follow the steps previously mentioned in the guide when copying and reusing items already created (i.e. sections 2.3, 3.3, 3.4, 6.2, 6.3) and to amend appropriately the different items you have already spotted and marked up in red in the new questionnaire you are inputting

****IMPORTANT**** ***AS PREVIOUSLY MENTIONED IN SECTION 6.2, IF YOU WANT TO RE-USE A QUESTION AND "CODE LIST", BUT YOU NEED TO SLIGHTLY MODIFY THE "CODE LIST" (THIS INCLUDES ADDING/CHANGING LANGUAGES), YOU MUST CREATE THE QUESTION FROM SCRATCH*.**

If you have specific questions for which you cannot find the answer in this guide, please reach out to the Sciences Po team at sshoc.project@sciencespo.fr.