

Last updated: November 20, 2022



WORKFLOW FOR THE DOCUMENTATION OF QUESTIONNAIRES WITH COLECTICA SOFTWARE FOR THE ETHNIC AND MIGRANT MINORITIES QUESTION DATA BANK (EMM QDB)

Meredith Winn
Ami Saji
Laura Morales



COST is supported by the
EU Framework Programme
Horizon 2020



How to cite this document:

Winn, Meredith; Saji, Ami; & Morales, Laura. (2022). *Workflow for the Documentation of Questionnaires with Colectica Software for the Ethnic and Migrant Minorities Question Data Bank (EMM QDB)*. (Version 1.0). Zenodo. <https://doi.org/10.5281/zenodo.7401597>

© 2022. This work is licensed under an Attribution-NonCommercial-ShareAlike 4.0 International (CC BY-NC-SA 4.0) license.



Acknowledgements

This user guide was developed by a team of researchers at Sciences Po (CEE) in connection with the Ethnic and Migrant Minorities Question Data Bank (EMM QDB), which has jointly been produced by [COST Action 16111-ETHMIGSURVEYDATA](#), the [SSHOC \(Social Sciences and Humanities Open Cloud\)](#) project, and the [FAIRETHMIGQUANT \(Making ethnic and migrant minority survey data FAIR\)](#) project.

The SSHOC project received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 823782. The FAIRETHMIGQUANT project received funding from the French National Research Agency (ANR) under grant agreement No ANR-19-DATA-0004-01. [COST Action 16111-ETHMIGSURVEYDATA](#) has also contributed to the development of this user guide, but the work was not directly funded by COST (European Cooperation in Science and Technology).

The authors wish to thank the CDSP (Sciences Po) team, as well as colleagues at GESIS and NSD, for their support throughout the project.

The information in this user guide reflects only the authors' views and the European Community or any of the funders are not liable for any use that may be made of the information contained therein. The information in this user guide is provided "as is" without guarantee or warranty of any kind, express or implied, including but not limited to the fitness of the information for a particular purpose. The users thereof use the information at their sole risk and liability.

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 outlines the general workflow for documenting questionnaires, mapping concepts to specific questions, and publishing questionnaires to the CDSP's Colectica Portal, using the Colectica software, for setting up the EMM QDB.

In this document, you will find the following sections:

[1. Assignment of Questionnaires](#)

[2. Inputting a Questionnaire from Scratch](#)

[2.1: Accessing the Questionnaire](#)

[2.2: Documenting the Questionnaire](#)

[2.3: Conceptual Mapping](#)

[2.4: Labeling Question Items](#)

[2.5. Final Quality Control and Publication to the Public Colectica Portal](#)

[3. Inputting a Questionnaire via Importing a DDI XML file from Nesstar](#)

It is also important to note that the workflow described below has been developed based on the experience of handling selected questionnaires from *pilot 1 'Social ties and civic participation'*. However, the authors of this document believe that the workflow established can be used for scaling the EMM QDB to cover and include other thematic topics.

For the purposes of the EMM QDB and this document, the term '**questionnaire**' is used to refer to all the language versions of a questionnaire used within a single fieldwork location of a survey. For example, for the Barcelona wave of LOCALMULTIDEM, the *LOCALMULTIDEM Barcelona questionnaire* would refer to both the Spanish and Arabic versions of the questionnaire.

Finally, to complement this workflow document, the following two user guides have been created: a) [User Guide for the Editing of Questionnaire Metadata with Colectica Questionnaires for the EMM QDB](#) and b) [User Guide for the Editing of Questionnaire Metadata with Colectica Designer for the EMM QDB](#). The first document explains the steps for using the Colectica Questionnaires software to input a questionnaire, while the second describes how certain functionalities of Colectica Designer are used for the purposes of the EMM QDB.

1. Assignment of Questionnaires

Questionnaires will always be assigned by the coordination team of the EMM QDB work, who will take into account your language skills and a pre-established list of priority questionnaires. It is very important that you do not decide on your own which questionnaire to input.

Whenever a questionnaire is assigned to you, it will be communicated via email. You will then have a dedicated meeting with the coordination team to determine into which of the three categories below your assigned questionnaire falls:

- A. A master questionnaire in a single language OR a questionnaire fielded in one location and in one single language (e.g. [Longitudinal Survey on the Integration of Newcomers-First wave \(2010\)](#), where the questionnaire was only offered in French).
- B. A questionnaire fielded in one location and in more than one language, where all the language variations are exact translations of one another (e.g. [Immigrant Citizens Survey in Madrid](#), where the questionnaire was offered as equivalent translations in Spanish, Arabic, Chinese, etc.)
- C. A questionnaire fielded in one location and in more than one language, where the language variations differ due to language-specific adaptations (e.g. [LOCALMULTIDEM in Barcelona](#), where questions were adapted/tweaked based on whether the respondent was Arabic or Spanish-speaking)

The category determination will need to be made by carefully reviewing all the questionnaire versions. In cases where it is difficult to determine if a questionnaire falls into category B or C, Laura Morales (laura.morales@sciencespo.fr) as the project PI shall be consulted.

It is very important that for the sections below, you follow the instructions specific to the classification assigned to your questionnaire. If at any point you forget if your questionnaire is in category A, B, or C, you should STOP working on your questionnaire and you should alert ASAP the coordination team (ethmigsurveydata@sciencespo.fr) and/or Laura Morales.

2. Inputting a Questionnaire from Scratch

2.1: Accessing the Questionnaire

Each questionnaire must be documented using Colectica Questionnaires and Colectica Designer. In order to do this, a copy of the questionnaire must be retrieved.

1. Retrieve the questionnaire. Questionnaires are stored in [MyCore](#). For security purposes, the modalities of connection to MyCore will be communicated to all external users separately via email by the coordination team. Once you are granted access to MyCore, access the folder titled *1.Pilot 1* and the subfolder *0. Unclassified*.
2. Questionnaires are named according to the name of the survey. If there are multiple questionnaires for the same survey (for instance, multiple fieldwork locations) and/or multiple language versions of a questionnaire, these will be stored in a folder. Be sure to verify that you downloaded the correct language version (for category B and C

questionnaires only) and year (for questionnaires from longitudinal or repeated cross-sectional surveys). If you are unsure if you have located the correct questionnaire, contact the coordination team.

3. Download the questionnaire (and, when applicable, for category B and C questionnaires, all of its language versions) onto your computer. Be sure to save the questionnaire to a place where it is easily accessible.
4. **Category A:** Check the contents of the questionnaire to ensure it is the finalised master or final fieldwork version. If applicable and if needed, cross-check your questionnaire against the other questionnaires available for the same survey to see how they compare. If, after carefully reviewing the contents of the questionnaire, it appears that the questionnaire is NOT the final version (e.g. the questionnaire used in Spain has adapted questions to the respondent groups, whereas the questionnaire you have retrieved has left all questions to be generic), please notify the coordination team.

Categories B and C: Check the contents of all the language versions of the questionnaire to ensure that they are the finalised versions used for fieldwork. If, after carefully reviewing their contents, it appears that not all the language versions are the finalised ones, please notify the coordination team.

2.2: Documenting the Questionnaire

1. Contact the coordination team and request, for the questionnaire you will be inputting, that an empty Instrument is created via Colectica Designer and subsequently published on the [pre-production Colectica Portal](#).¹ This is to ensure that the 'DDI agency' is correctly specified as 'int.ethmigsurveydata' and NOT 'int.example'.
2. Open Colectica Questionnaires and then open the empty Instrument created for your questionnaire using the feature, Open from Repository. ****IMPORTANT** You should not create a new questionnaire, and you should not re-name the questionnaire once opened.** However, if you believe the questionnaire was named incorrectly (i.e., it does not conform to the naming convention established in the [guidelines](#)), then please email the coordination team **before** inputting any items into the Instrument.
3. Update the [Colectica Questionnaires Tracker](#) with information on the questionnaire you are inputting.
 - a. Use the 'Survey Code' sheet of this tracker to ensure you are using the correct 3-letter code. If there has not been a code assigned, verify with the coordination team before proceeding. However, generally, the 3-letter code should appear as part of the name of the Instrument.
4. Follow the detailed [guidelines](#) to document the questionnaire in its entirety (i.e. all text/items found in the questionnaire, except internal notes/comments made by the data producers for their own research purposes). Please note that for category B questionnaires, all language versions are inputted into the same single Instrument.

¹ For security purposes, the Portal can only be accessed via VPN or the Sciences Po network (e.g. Sciences Po Secure).

- a. Remember to save your work often (roughly every 30 minutes and at a minimum every hour) by clicking '**Save**' AND synchronising the work to the [pre-production Colectica Portal](#) by clicking '**Synchronize**'.
 5. At the end of every session (i.e. when you finish working on Colectica Questionnaires for the day), click Synchronize for a final time to publish all the work you have completed onto the [pre-production Colectica Portal](#). You can check if you have properly published your completed work by checking the Pre-production Colectica Portal itself and/or re-opening the questionnaire via the remote repository (i.e. '**Open from Repository**').
 6. At the end of every session, be sure to also export the questionnaire metadata as '**DDI3.2**' and save this to a folder on your computer as a backup in case there is a bug with the software which causes your work to not be saved.
- **Once the questionnaire has been fully inputted****
7. Export the questionnaire as a PDF (use all the different options presented by Colectica Questionnaires) and check it for any obvious errors or typos. If you find any, correct them before proceeding to the next step.
 8. Export the questionnaire to DDI 3.2 as a security copy. Ensure the file name includes the survey name and all necessary identifying information (e.g. country name if the questionnaire is for a cross-country survey, year if the questionnaire is for a longitudinal/repeated cross-sectional survey). Save this file on your computer.
 9. Publish the questionnaire to the pre-production Colectica Portal by clicking Synchronize.
 10. When the questionnaire has been fully inputted, indicate this in the [Colectica Questionnaires Tracker](#). It is now time to move to Step 3, which will be handled by the coordination team **only**. Be sure to notify the coordination team that the questionnaire is ready for conceptual mapping.

2.3: Conceptual Mapping

1. Download the questionnaire from the remote repository.
2. Open all the relevant conceptual hierarchy files and the original questionnaire for reference. You will also need to have the [Questionnaire Question Label Tracker](#) open.
3. Beginning with the '**Question Constructs**', open each '**Question Item**' to check for relevance to the defined concepts.²
4. When you click on the Question Item, you will be able to see the question-level metadata. Use this as an opportunity for an additional quality control to check for any errors. Note that Colectica will identify spelling errors for words spelled with British English over American English (e.g. neighbour, analyse, etc.). These do not need to be corrected.
5. Copy the '**Question Name**' and Paste it into the Question Name column in the [Questionnaire Question Label Tracker](#).
6. Navigate to the Conceptual tab and add the relevant concept or concepts to the Question Item. Be sure to select an existing concept from the list (using the magnifying glass). **Do not** create a new concept.³

² All concepts have been created and entered for Pilot 1 and those found in ICS master. If new concepts are added or the hierarchy is altered, follow the Colectica Designer Guide to incorporate these changes.

³ If you accidentally create a new concept, be sure that it is blank and remove it from the question item. It will be deleted when the local database is cleaned.

NOTE: The following Steps 7-10 only apply to questionnaires with multiple language versions, are fielded in multiple locations, or are longitudinal/repeated cross-sectional. If it is a stand-alone questionnaire, skip to step 11.

7. In the '**Represented Variable**' box, type⁴ the concept name followed by (3LetterSurveyCode-City/Country) in accordance with the [naming and labelling convention](#).
8. Click on the newly-created Represented Variable.
9. Paste the name of the question into the Name box. Then, remove the language information. This creates a name consistent with the naming and labelling convention.
10. Copy the '**Concept Name**' from the label box and paste it into the '**Concept column**' of the [Questionnaire Question Label Tracker](#).
11. Add the '**Conceptual Variable**'. There are two processes depending on if the Conceptual Variable has already been created (as part of a related questionnaire).
 - a. If the Conceptual Variable Must Be Created:⁵ Click the + icon to create a new Conceptual Variable. In the label box, type or paste the concept name followed by the 3-letter study code in parentheses ([naming and labelling convention](#)). Attach the corresponding concept to the Conceptual Variable.
 - b. If the Conceptual Variable has already been created: Use the magnifying glass to find and select the appropriate Conceptual Variable.
12. Repeat these steps for all Question Items in the Question Constructs.
13. Once Question Constructs have been completed, do the same exercise with Sequences. Some of the Question Items may have already appeared under Constructs, but you should verify that all have been covered.
14. If there are 'Conditional Logic(s)' in the questionnaire, you will also need to verify that all Question Items that appear under the '**Conditional**' drop-down menu have been properly mapped.
15. Once all Question Items have been mapped, publish the results to the [pre-production Colectica Portal](#).
 - a. You may also publish to the pre-production Colectica Portal at intermediary points. You should ideally do this any time you end a work session, but you may also find it useful to regularly publish as a way of backing up your work.

2.4: Labeling Question Items

'**Question Labels**' use conceptual information and **must** be added using Colectica Questionnaires. Therefore, they are added after the conceptual mapping has been completed using the [Questionnaire Question Label Tracker](#).

1. Open Colectica Questionnaires and then open the desired questionnaire using 'Open from Repository'.

⁴ You could also copy the concept name by clicking on the concept which redirects you to the concept metadata. Here, you copy the concept name from the label box. Then, use the tabs at the top (you may need to scroll horizontally) to return to the question item.

⁵ There should only exist 1 conceptual variable for each concept within a single study (longitudinal/repeated cross-sectional, cross-country, or multilingual). Conceptual variables for the same concept should be unique to the study (represented by the unique 3-letter survey code).

2. For each Question Item in the [Questionnaire Question Label Tracker](#), add the label following the established naming convention:

[Concept] (StudyAcronym Year⁶-Location⁷-Language)

e.g. Subjective political knowledge (local level) (LMD-Lyon-FRA)

In cases where there is more than one concept mapped to a question, each concept should be listed using the above naming convention and then separated with a semicolon:

e.g. Confidence in national parliament (LMD-Master-ENG); Confidence in national cabinet/national government (LMD-Master-ENG)

3. Indicate in the [Questionnaire Question Label Tracker](#) when you have added the Question Label.
4. Once all Question Labels have been updated, save the results. First, hit Save. Second, export the metadata as DDI (indicate the survey and date in the title and indicate final_final). Third, publish to the [pre-production Colectica Portal](#) by clicking on Synchronize.
 - a. Be sure that the updated questionnaire has been properly published before closing Colectica Questionnaires.
5. Update the [Colectica Questionnaires Tracker](#) (columns Q-R).
6. Clear the [Questionnaire Question Label Tracker](#), so it is ready for use for the next questionnaire.

2.5. Final Quality Control and Publication to the Public Colectica Portal

1. Once the Question Labels have been added, the questionnaire is in its final phase before being published to the [public Colectica Portal](#).
2. Before publication, view the questionnaire in the [pre-production Colectica Portal](#). Referring to the [Questionnaire Question Label Tracker](#), use the 'Explore' tab to ensure that questions are displayed under the appropriate concept.
3. For the mapped questions, ensure that there is a Represented and Conceptual Variable linked.
4. Review the full questionnaire paying attention to any irregularities.⁸
5. Add any questionnaire-level metadata you want to provide into the '**Details**' section of the corresponding Instrument. You can consult already published questionnaires to see how metadata is typically produced and inputted.
6. Attach the questionnaire (i.e. the Instrument containing your questionnaire) to the corresponding '**Study**' created for the survey to which the questionnaire you are inputting belongs. If no Study has been created for the questionnaire you are working on, create a Study for the overall survey, following the guidance provided in the [Colectica Designer Guide](#) and by consulting existing Studies (e.g. ICS, LOCALMULTIDEM).

⁶ Where applicable

⁷ Where applicable

⁸ While we would like to ensure that the questionnaire metadata being published publicly is of high quality, it is always possible to correct errors found after publication simply by making the change within Colectica Designer and publishing the updated metadata.

7. Once satisfied with the Instrument and Study, ensure they are both attached to the '**EMM QDB Collection Series**', following the guidance provided in the [Colectica Designer Guide](#).
8. Once step 7 is completed, the questionnaire you have inputted and had concepts mapped onto is ready for publishing. However, the general rule is to send DDI 3.1 and 3.2 XML files of the updated EMM QDB Collection Series to Lucie Marie of the CDSP (lucie.marie2@sciencespo.fr) for publishing **only** when there are at least 3-4 new items ready for publishing. When these XML files can be sent to Lucie, drop her an email with the XML files. Lucie will then review these files before publishing; only when she approves these files with the updated version of the EMM QDB Collection Series, it will be made available on the [public Colectica Portal](#).

3. Inputting a Questionnaire via Importing a DDI XML file from Nesstar

At the time of writing, we were not still able to directly upload DDI2 downloaded from Nesstar into Colectica Designer version 5.5. However, Colectica was able to provide support to convert DDI2 into DDI3.2 for importation. For instance, two surveys (ELIPA 2010 & 2011) had been converted and were in the process of being documented. Here are the steps to follow for an importation:

1. Before importing the DDI, ensure that the language and agency are correct. If they are not, use Find & Replace to correct them within the XML document **before** importation into Colectica.
 - a. Some metadata that is in non-English language have been mis-specified as English by the data producers
 - b. Some metadata do not have agencies are given int.example agency
2. Import the DDI using Colectica Designer's '**Import DDI**' feature.
3. This will create a new metadata package which appears as a '**Checkout**'.
4. Locate the '**Instrument**' inside the '**Metadata Package**'.
 - a. I suggest checking out the Instrument so that it is easier to access directly.
5. Rename the Instrument according to our naming convention.
6. Publish the Instrument to the Pre-production Colectica Portal.
7. Re-open the Instrument in Colectica Questionnaires using Open from Repository.
 - a. The questions will likely be in random order. It is very cumbersome to re-order the questions by dragging and dropping them.

***NOTE* Steps 8-14 detail how to re-order the questions most efficiently.**

8. For the first block or section, create a new sequence.
9. Add the questions to that sequence using the add an existing question function.
10. Check that the question and codelist appear correctly. Make any necessary changes.
11. Repeat 9-10 for all questions in that block of sequence. If there were any questions on the questionnaire that were not imported, add them.
12. You will also need to be sure to add Statement text as needed.
13. Repeat 8-12 for each block or section in the questionnaire
14. After every question item is inside a sequence, delete all question items that are outside of the sequences.