Managing questionnaire metadata using Archivist

Becky Oldroyd

September 2022

Scan the QR code to visit our Archivist GitHub page

What is Archivist?

Open-source web application

Multiple users can enter and edit questionnaires

Link questions to variables

Map questions/variables to topics/concepts

Exports DDI Lifecycle 3.2

Archivist → CLOSER Discovery

Why was Archivist developed?

LIFE AT SCHOOL

B1. Have you had any changes of school since you left your Primary/Prep School?

SKOOL?

(JB1) Tick one box

NO change (same school)
all the time) . . . . ☐
YES one change . . . . ☐
YES two changes . . . . ☐
YES three changes . . . . . ☐
YES four or more changes ☐

If YES, please answer 1(a) and (b) below:

1(a) Give name and address of the last school you went to before the present one
(JB1A)∗

1(b) Give dates that you attended that school
From ____(JB1B)∗____ till _____

LIFE AT SCHOOL ^

qc_B1

Have you had any changes of school since you left your Primary/Prep school?

Tick one box

- ⊘ *1* = NO change (same school) all the time)
- ⊘ *2* = YES one change
- ⊘ *3* = YES two changes
- ⊘ *4* = YES three changes
- ⊘ *5* = YES four or more changes

Min Responses : **1** Max Responses : **1**

Variables

- JB1

c_qB1

If YES, please answer 1(a) and (b) below:

qc_B1 >= 2 && qc_B1 <= 5

True ^

qc_B1_a

Give name and address of the last school you went to before the present one:

Tт Generic text (255 maximum length)

qc_B1_b

Give dates that you attended that school: From ... till

📅 Generic date () Date

📅 Generic date 2 () Date

LIFE AT SCHOOL ⌄

B1   Have you had any changes of school since you left your Primary/Prep school?

⌄

     1   NO change (same school) all the time)

     2   YES one change

     3   YES two changes

     4   YES three changes

     5   YES four or more changes

If YES, please answer 1(a) and (b) below:

⌄

B1 a   Give name and address of the last school you went to before the present one:

⌄

Generic text

B1 b   Give dates that you attended that school: From ... till

⌄

Generic date
Generic date 2

What can we document in Archivist?

- Questionnaire title
- Questions
  - Question items and grids
  - Instructions
  - Interviewee
- Response domains
- Code lists
  - Cardinality
- Routing (i.e., conditions)
- Loops
- Sequences
- Statements

Code Lists

Categories	451
Code Lists	122

ResponseDomains

Datetime Answers

Numberic Answers

Text Answers

Questions

Question Items	377
Question Grids	0
Instructions	20

Constructs

Conditions

Loops

Questions

Sequences

Statements

Things For You to Do

Thank you for filling this in. Children of the 90s loves to look at the things you draw!

Question name/label

A1. Do you ever have a headache?

Question text

yes, quite often 1

yes, sometimes 2

yes, I had one once 3

no, never 4 → **If <u>no,</u> go to question A3 below**

Code list

Routing/Condition

Instruments > alspac_99_ttd

ALSPAC - Things for you to do   BUILD   MAP

alspac_99_ttd ⌃

Statement

s_intro_i   Things For You to Do

s_intro_ii   Thank you for filling this in. Children of the 90s loves to look at the things you draw!

qc_A1

Interviewee : **Cohort/sample member**

Question text → Do you ever have a headache?

⊘ *1* = yes, quite often
⊘ *2* = yes, sometimes
⊘ *3* = yes, I had one once
⊘ *4* = no, never
Min Responses : **1** Max Responses : **1**

Code list

Variables

○ ccaf100

Routing/condition →

c_A1   If no, go to question A3 below
                             qc_A1 == 4

Flowchart | Summary | Details

Start

alspac_99_ttd

Things For You to Do

Thank you for filling this in. Children of the 90s loves to look at the things you draw!

Statement

A1 — Do you ever have a headache?

Question name/label

Question text

1	yes, quite often
2	yes, sometimes
3	yes, I had one once
4	no, never

Code list

Condition text

If no, go to question A3 below

qc_A1 == 4

Condition logic

Routing/Condition

Who can use Archivist?

- Simplifies questionnaire entry
  - No DDI or XML knowledge required
  - Questionnaire entry is carried out by trained but not technical staff
- Can be done remotely

Quality control features of Archivist

Quality control features of Archivist

- Re-using code lists/response domains within questionnaires

Quality control features of Archivist

- Asterisks to highlight the minimum amount of metadata required

Label *

Instruction

Literal *

Response Domains ⊕

Response Domains
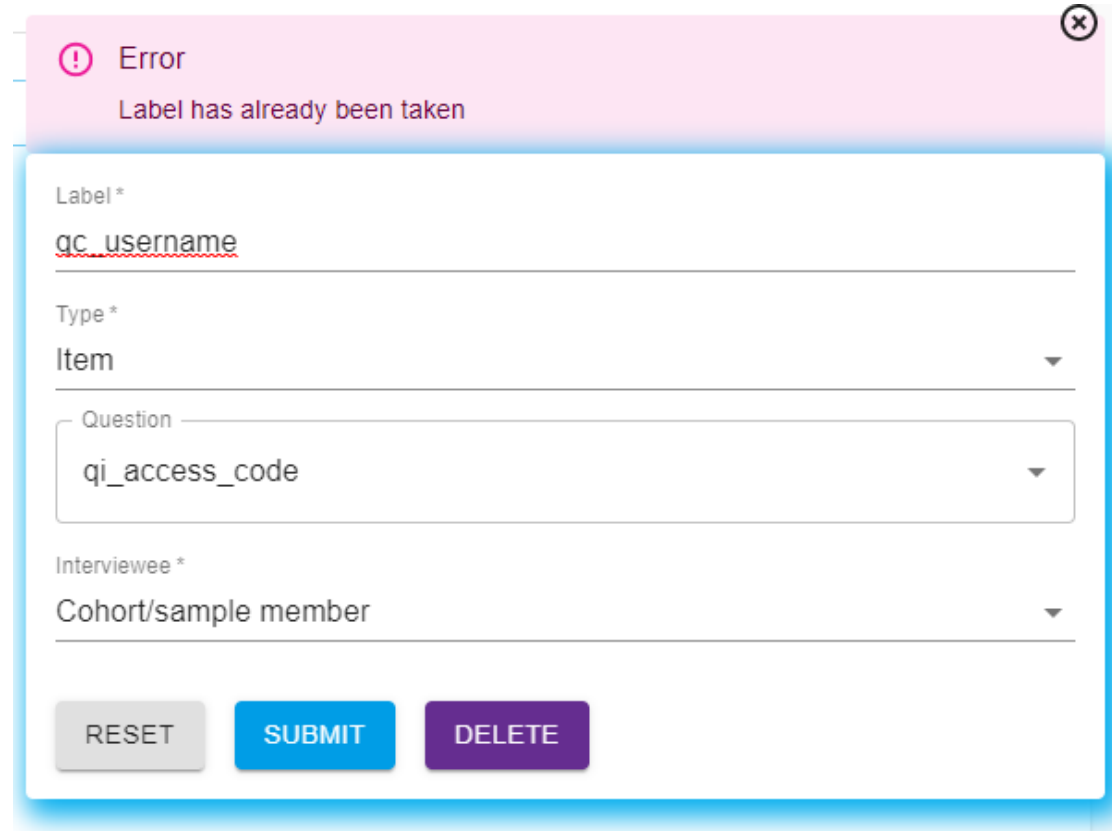
Type and Label   Actions

RESET   SUBMIT

Quality control features of Archivist

- Automated checks to flag errors and inconsistencies

Quality control features of Archivist

- Copy completed questionnaires rather than starting from scratch

CLOSER's controlled vocabulary

CLOSER's controlled vocabulary

CLOSER's controlled vocabulary
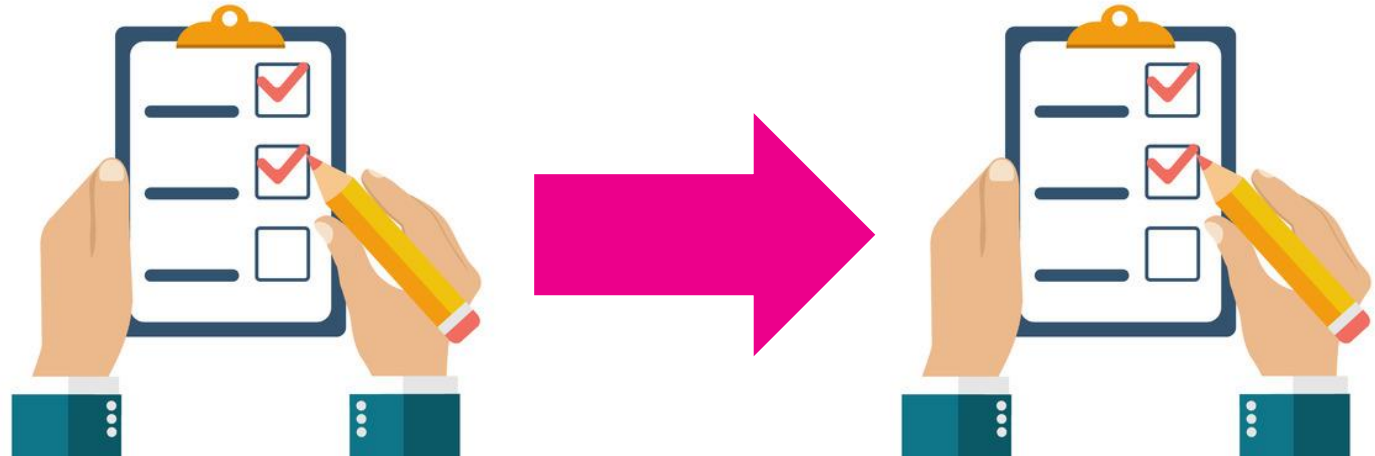
CLOSER's controlled vocabulary

Confluence   Spaces ∨

Q Search   ?   Lc

- What is the CLOSER Technical W
- CLOSER Discovery
- Controlled Vocabularies
  - Analysis Unit (Question Cons
  - Analysis Unit (Study)
  - Biological Sample
  - Collection Methods
  - Commonality Type
  - **Interviewee (Response Unit**
  - Kind Of Data
  - MIMEType
  - Topics
  - Type of Material
  - Use Condition
  - Variable Source

Pages / CLOSER / Controlled Vocabularies   ...

Interviewee (Response Unit)

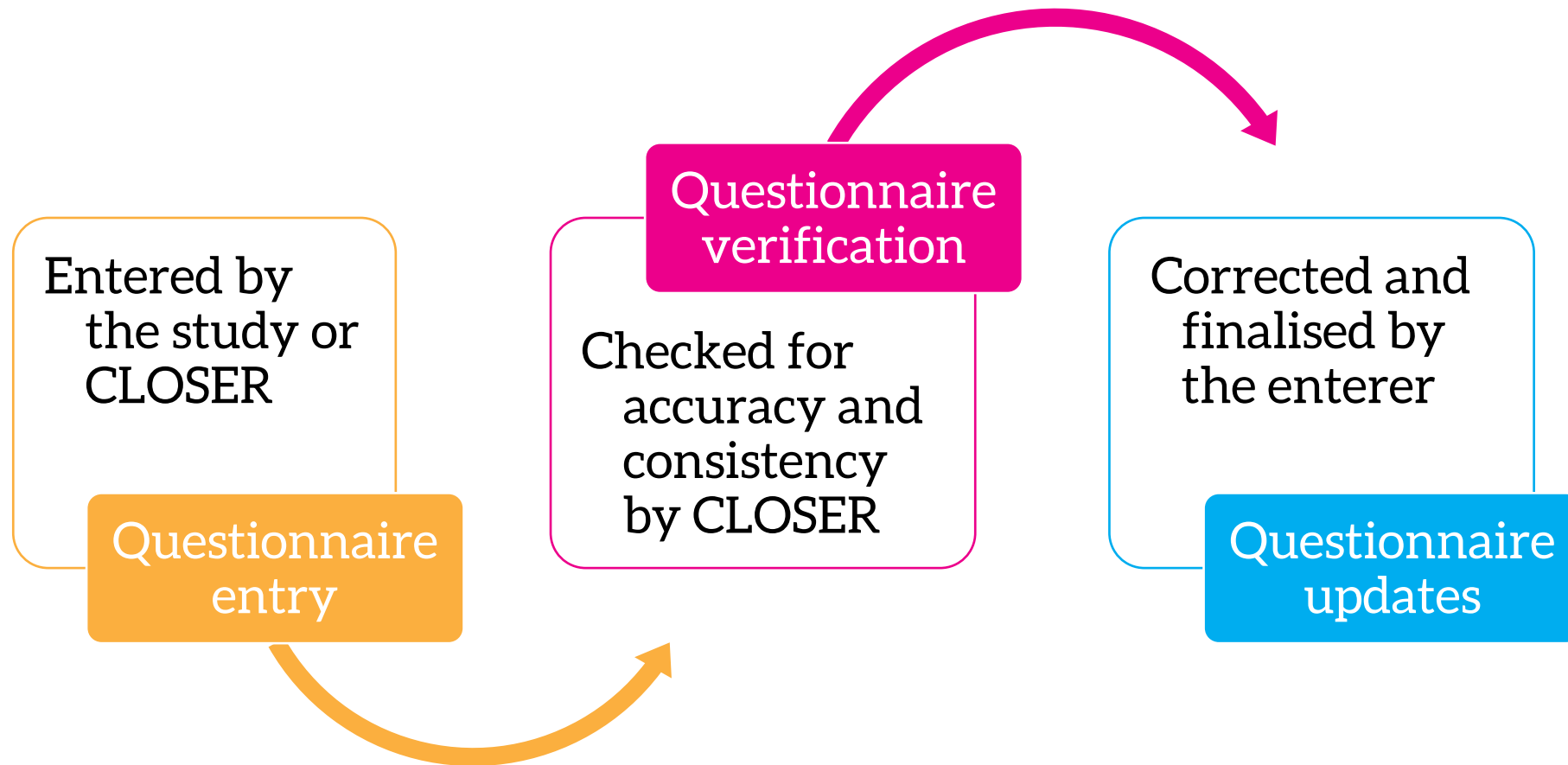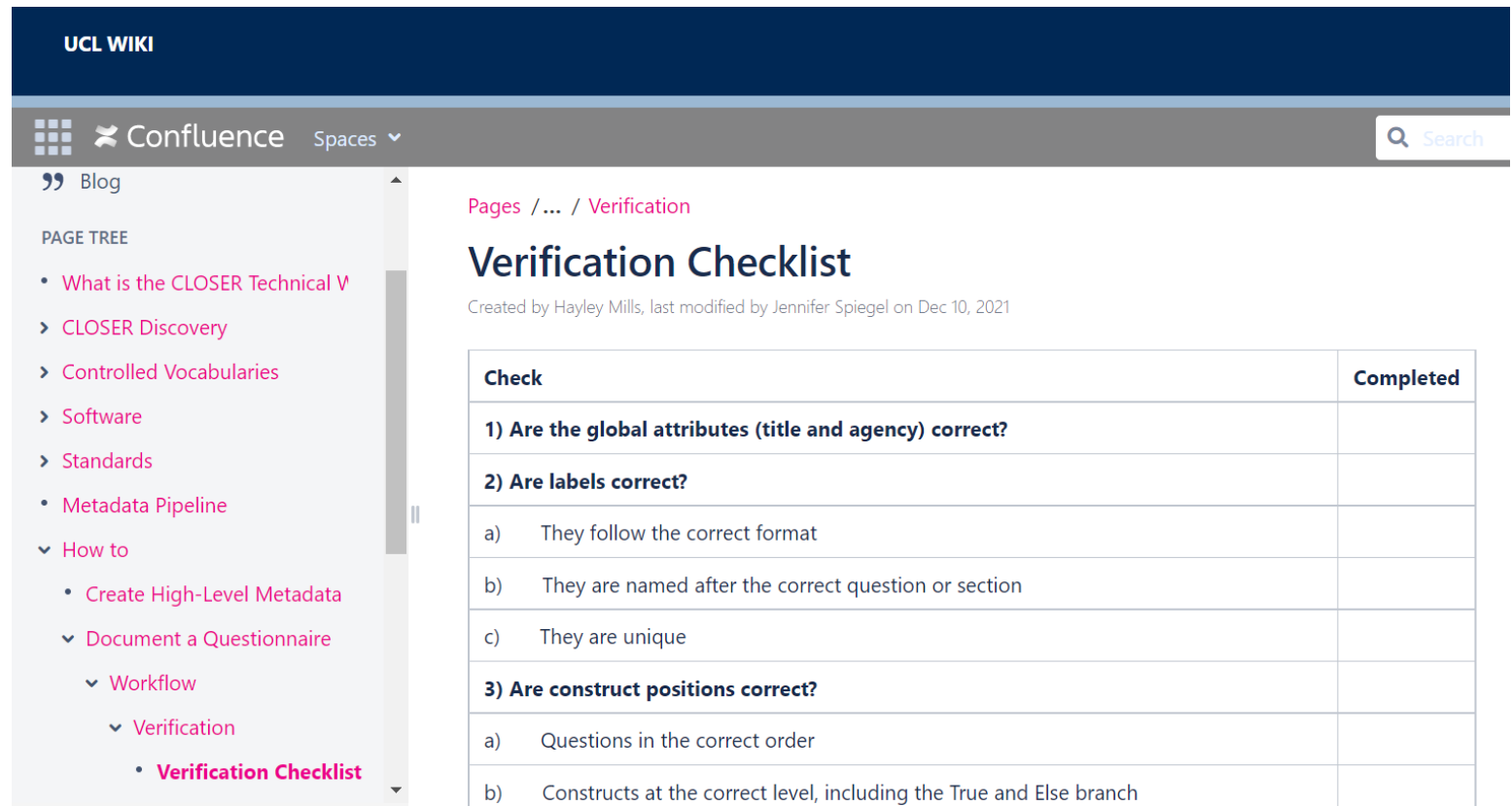Created by Gemma Seabrook, last modified by Holly Nyx on Aug 25, 2016

This controlled vocabulary is bespoke for CLOSER. It describes the people who might be respondents on an instrument (the interviewee).

Response Unit	Additional details
Cohort/sample member	The main cohort member/study participant
Main parent of cohort/sample member	In earlier studies this was assumed to be the mother
Partner of main parent/Father	In earlier studies this was assumed to be the father
Child of cohort/panel member	Offspring of the main cohort member/study participant
Proxy	This is someone responding on behalf of a cohort member who is unable to respond themselves
Interviewer	In some cases, the interviewer was asked to give their assessment rather than ask the cohort member
Other	Examples include, nurse, midwife or teacher where they are completing the questionnaire about the cohort member rather than interviewing them

Quality control throughout the metadata workflow

Questionnaire entry
Entered by the study or CLOSER

Questionnaire verification
Checked for accuracy and consistency by CLOSER

Questionnaire updates
Corrected and finalised by the enterer

Questionnaire verification

- Stringent verification process
    - **Checklist**
    - Summary tables
    - Listening

Questionnaire verification

- Stringent verification process
  - Checklist
  - **Summary tables**
  - Listening

Questionnaire verification
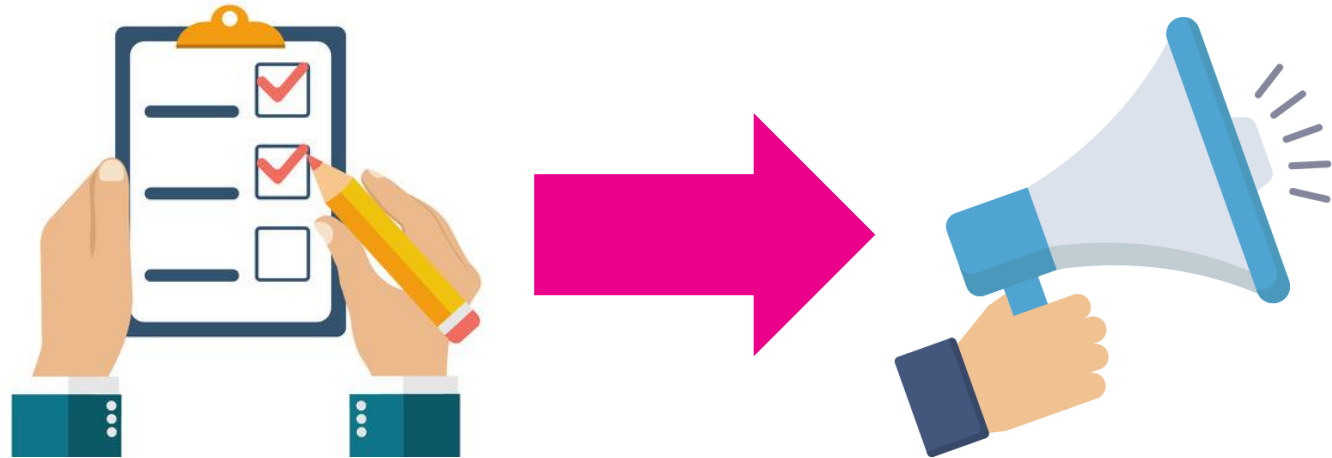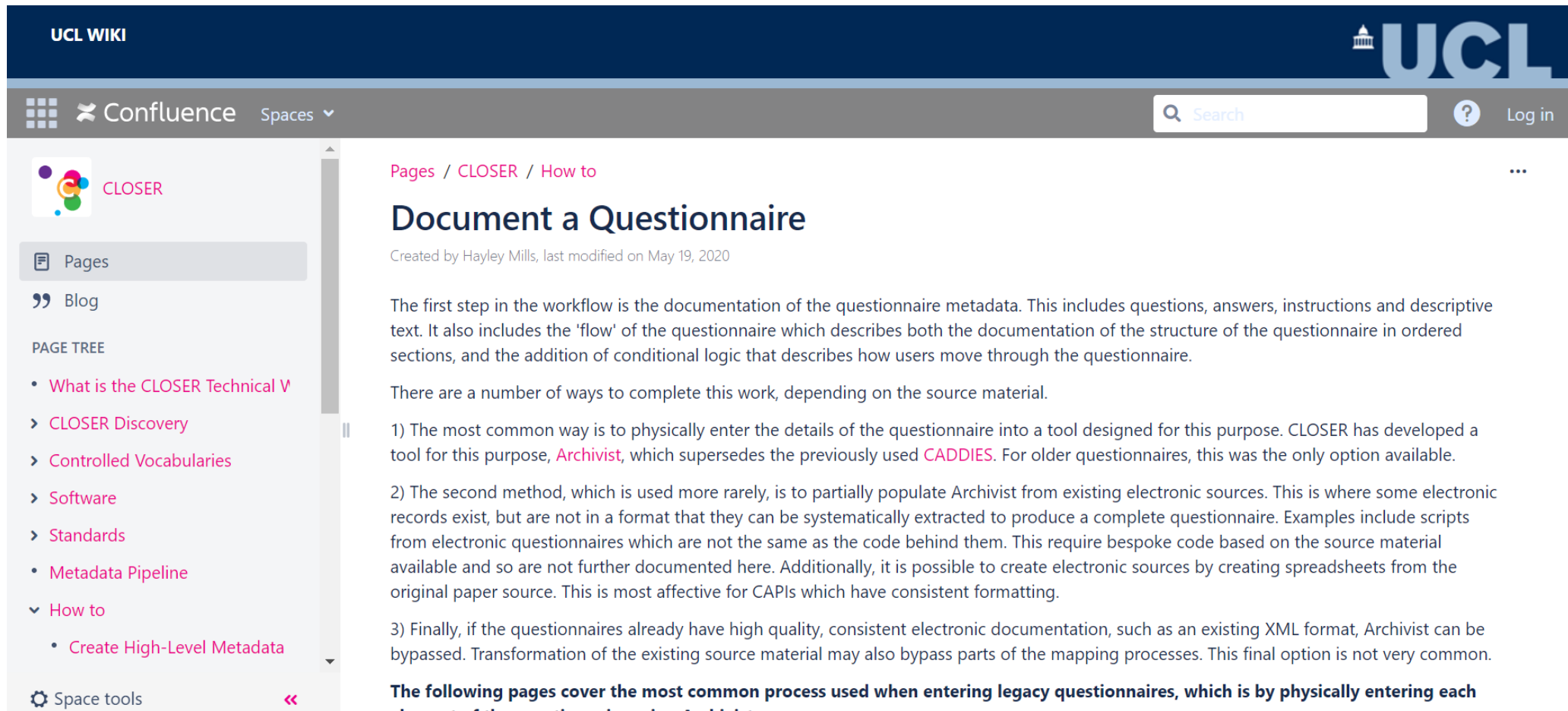
- Stringent verification process
  - Checklist
  - Summary tables
  - **Listening**

CLOSER Technical Wiki
https://wiki.ucl.ac.uk/display/CLOS/CLOSER

UCL WIKI

≡ Confluence   Spaces ⌄   🔍 Search   ❓ Log in

CLOSER

📄 Pages

❞ Blog
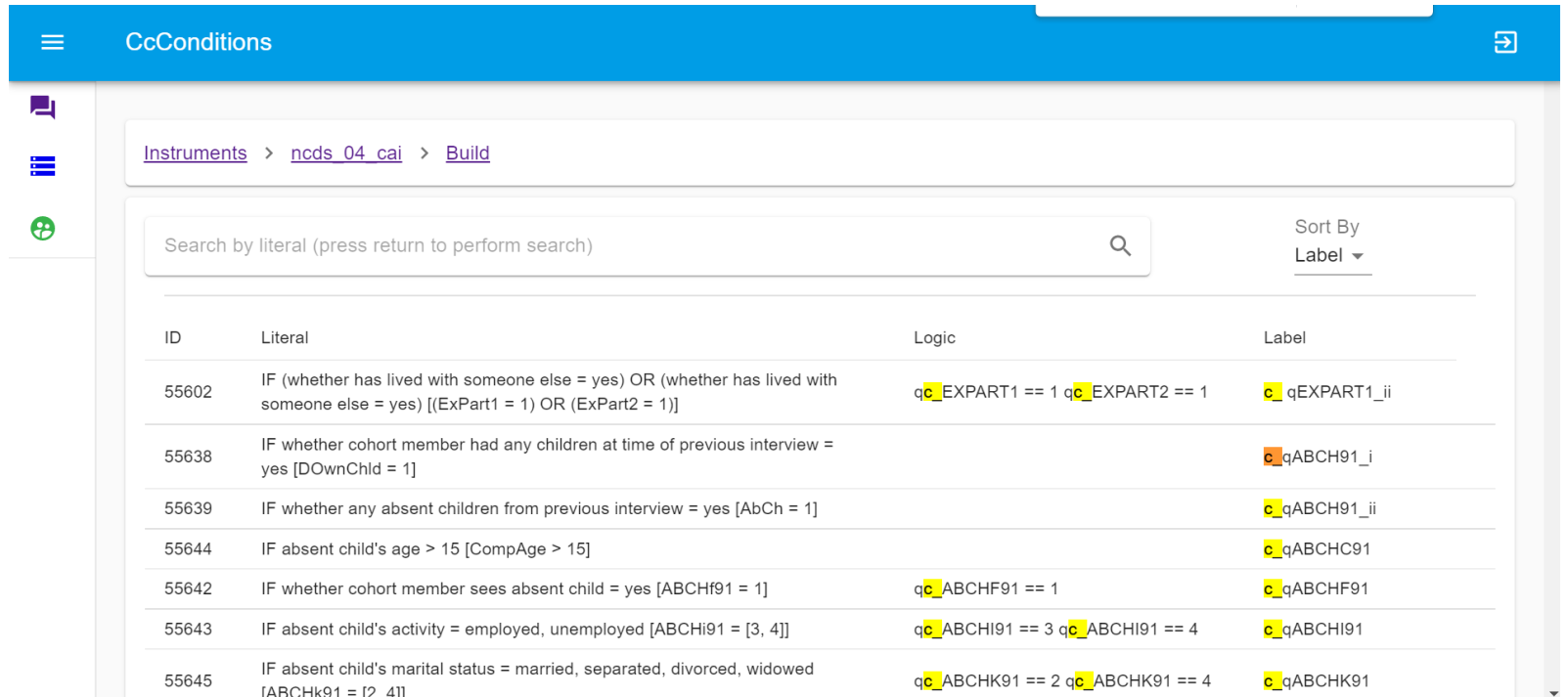
PAGE TREE

- What is the CLOSER Technical W
- › CLOSER Discovery
- › Controlled Vocabularies
- › Software
- › Standards
- Metadata Pipeline
- ⌄ How to
  - • Create High-Level Metadata

⚙ Space tools   «

Pages / CLOSER / How to

Document a Questionnaire

Created by Hayley Mills, last modified on May 19, 2020

The first step in the workflow is the documentation of the questionnaire metadata. This includes questions, answers, instructions and descriptive text. It also includes the 'flow' of the questionnaire which describes both the documentation of the structure of the questionnaire in ordered sections, and the addition of conditional logic that describes how users move through the questionnaire.

There are a number of ways to complete this work, depending on the source material.

1) The most common way is to physically enter the details of the questionnaire into a tool designed for this purpose. CLOSER has developed a tool for this purpose, Archivist, which supersedes the previously used CADDIES. For older questionnaires, this was the only option available.

2) The second method, which is used more rarely, is to partially populate Archivist from existing electronic sources. This is where some electronic records exist, but are not in a format that they can be systematically extracted to produce a complete questionnaire. Examples include scripts from electronic questionnaires which are not the same as the code behind them. This require bespoke code based on the source material available and so are not further documented here. Additionally, it is possible to create electronic sources by creating spreadsheets from the original paper source. This is most affective for CAPIs which have consistent formatting.

3) Finally, if the questionnaires already have high quality, consistent electronic documentation, such as an existing XML format, Archivist can be bypassed. Transformation of the existing source material may also bypass parts of the mapping processes. This final option is not very common.

The following pages cover the most common process used when entering legacy questionnaires, which is by physically entering each
element of the questionnaire using Archivist

Take home points

Re-use metadata where possible

Automated checks to highlight errors

Integrate quality control into your metadata workflow

Document your metadata entry process

![closer — The home of longitudinal research]

Thank you ☺

UKRI Economic and Social Research Council