

# Data collection for surveys : a metadata-driven approach

BR expert group meeting  
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Insee

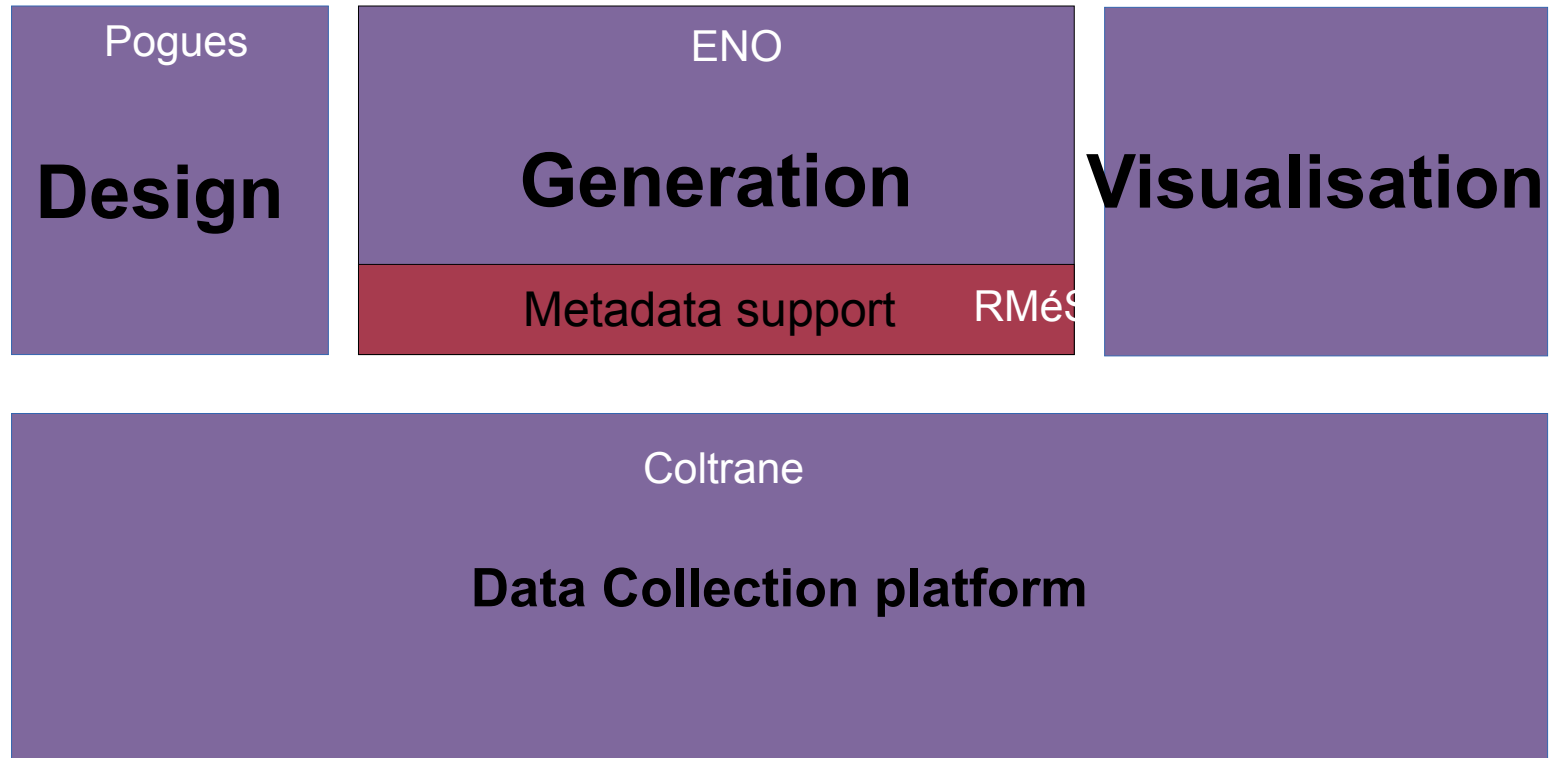


- 1** Overview
- 2** Conception of questionnaires
- 3** French Web portal for business surveys (Coltrane)

# Data collection platform

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Conception/Construction  
Collection



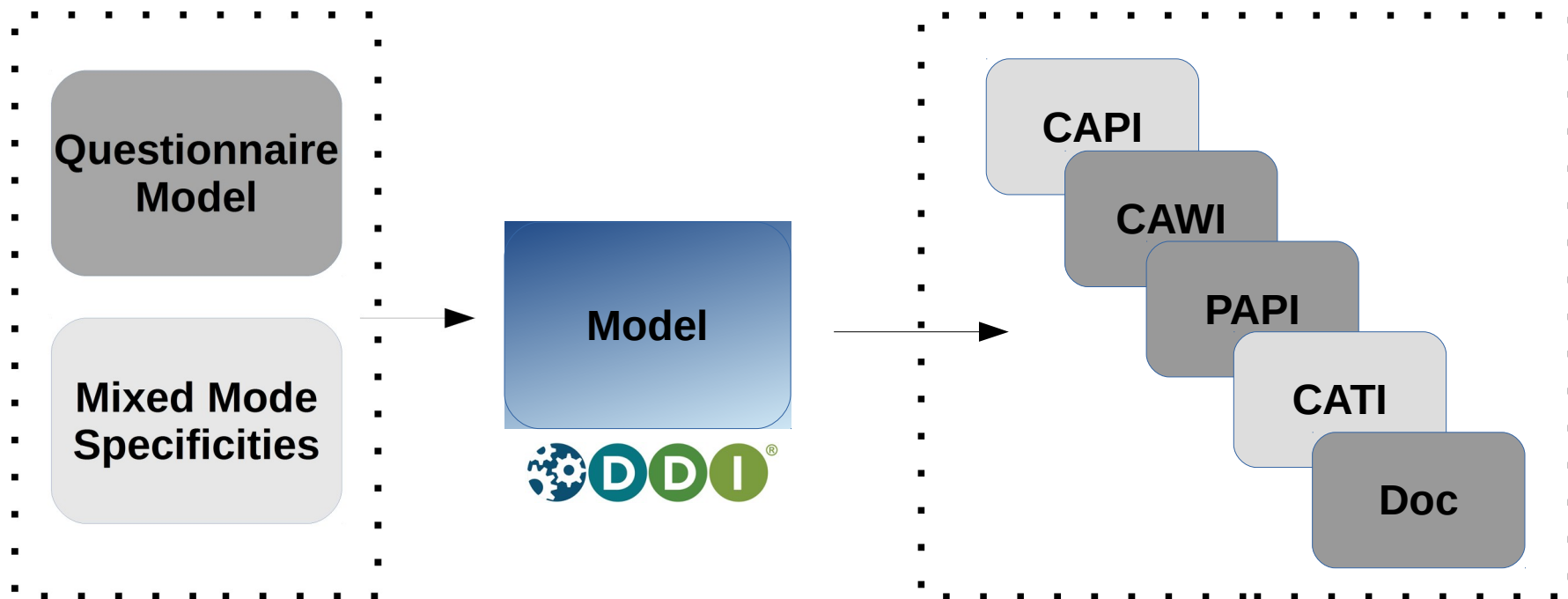
**Pogues** : Questionnaire designer user interface for metadata production

**Eno** : Questionnaire generator from metadata

**RmÉS** : Metadata repositories and services

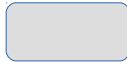

**Coltrane** : Survey platform for data collection

# **The questionnaires' conception : a metadata driven approach**



**Pogues**

**Eno**

 : Work in progress  
 : Done

## **Pogues is a user interface to describe the questionnaire**

- In an international standard : DDI
- In a very simple way

## **Eno is the questionnaire generator**

- from DDI description to web form and paper form

In which city do the Simpsons

Voir le détail

Dupliquer

Visualiser

Supprimer

## MODIFIER LA QUESTION

X

Libellé

In which city do the Simpsons reside?



Identifiant

CITY

Mode de collecte

☐ CAPI ☐ CATI ☒ CAWI ☐ PAPI

Format des réponses

Déclarations

Contrôles

Redirections

Variables externes

Variables calculées

Variables collectées

Type de question\*

Réponse à choix unique

Obligatoire



Type de saisie\*

☐ Case à cocher ☒ Bouton radio ☐ Liste déroulante

Spécifier la liste de codes\*

☐ Créer une liste ☐ Retrouver dans le référentiel ☒ Retrouver dans le questionnaire

Spécifier la liste de codes\*

TOWN

ANNULER

VALIDER

Which of the following means of transport were used by the hero and in which

## Generating questionnaires automatically means :

- Standardisation : implementing good practices  
... even if it leads to challenging old design choices (and accepting possible consequences on data series)
- Automatisation : proposing and develop generic formatting choices, investing in a generation engine  
... which involves quitting the tailor-made development of each questionnaire
- Pooling : allowing everyone (customers) to benefit from developments  
... which are prioritised within the framework of a shared operations booklet (discussed twice a year)




# Web questionnaire generated by ENO

Pogues x Questionnaire SIMPSONS x +

https://visualisation-questionnaires.insee.fr/rmesstromae/fr/esa-dc-2018/simpsons/new?unite-enquete=123456789

Rechercher

 Questionnaire SIMPSONS

Contacteur l'assistance

Déconnexion

Avancement

I - SIMPSONS' CITY

*This module asks about your general knowledge of the Simpsons city*

→ 1. In which city do the Simpsons reside ?

One possible answer

choose the city of their main residence

☐ Springfield

☐ Shelbyville

☐ Seinfeld

Retour Enregistrer et continuer

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Fichier Edition Affichage Fenêtre Aide

Accueil Outils schéma Coltrane a... form-final-out.pdf x

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## II - Simpsons' city

*This module asks about your general knowledge of the Simpsons city*

➔ **1. In which city do the Simpsons reside\*?**

*One possible answer*

☐ Springfield

☐ Shelbyville

☐ Seinfeld

➔ If you do not know the answer please go to the question 5

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- SCFE : Sharing Common Fonctionnalités
  - Eurostat ESSNet
- Open source project
  - Github : <https://github.com/InseeFr/Eno>
  - Github : <https://github.com/InseeFr/Pogues>
  - MIT License
- International
  - Code and comments in english
  - Online documentation :
    - Eno for dummies : <https://insee.fr.github.io/Eno/eno-for-dummies.html>
    - Questionnaire modeling : <https://insee.fr.github.io/Eno/ddi-qg-guide.html>

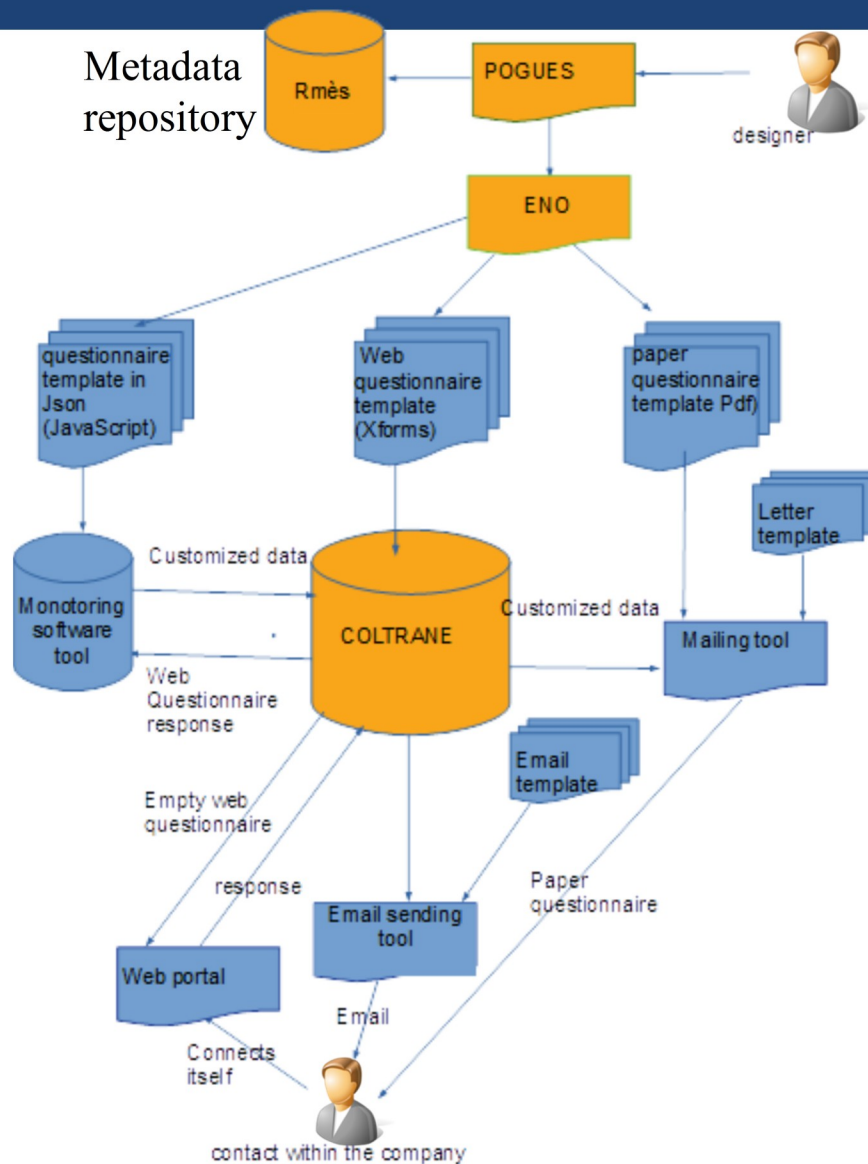


# **Coltrane : the French web portal for business surveys**

- Coltrane (transverse data collection for business survey) : to modernise, industrialize and standardise online data collection, with a modular conception (to be able to collect before the complete offer)
- Several sub-projects including :
  - A unique website
  - A real contact management, independent from the online data collection
  - Most of all : the availability of tools and modus operandi (for the NSI and its partners) to put « easily » surveys on the web
- Moreover: since April 2011 all statistical surveys should be put on the web (existing tools couldn't allow it) by law. Insee has made a commitment to do so gradually.

# The workflow

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- A unique Internet portal presents all the French statistical surveys
- Just to collect data (no survey management, which is done with specific tools or applications)
- Including all the surveys from the French NSI and ministerial statistical Offices
- The portal is customized for each contact (a respondent in an enterprise).  
Once authenticated, he can :
  - Fill in the questionnaire
  - see all the surveys he is interested in (or designated to answer its)
  - modify his own personal characteristics (e-mail, address, password)
  - look at the remaining surveys he still has to answer (and their deadlines)

- Independent from the online collection itself
- Linked to an authentication service
- One contact (one respondent in an enterprise) means a unique login (and password), for any survey
- Several contacts for a same questionnaire (survey \* unit) is allowed
- Internal tool allows Insee staff to:
  - Create/update a contact and its characteristics
  - Display the list of the surveys of a given contact
  - Assist the respondents and inform them about the coming surveys

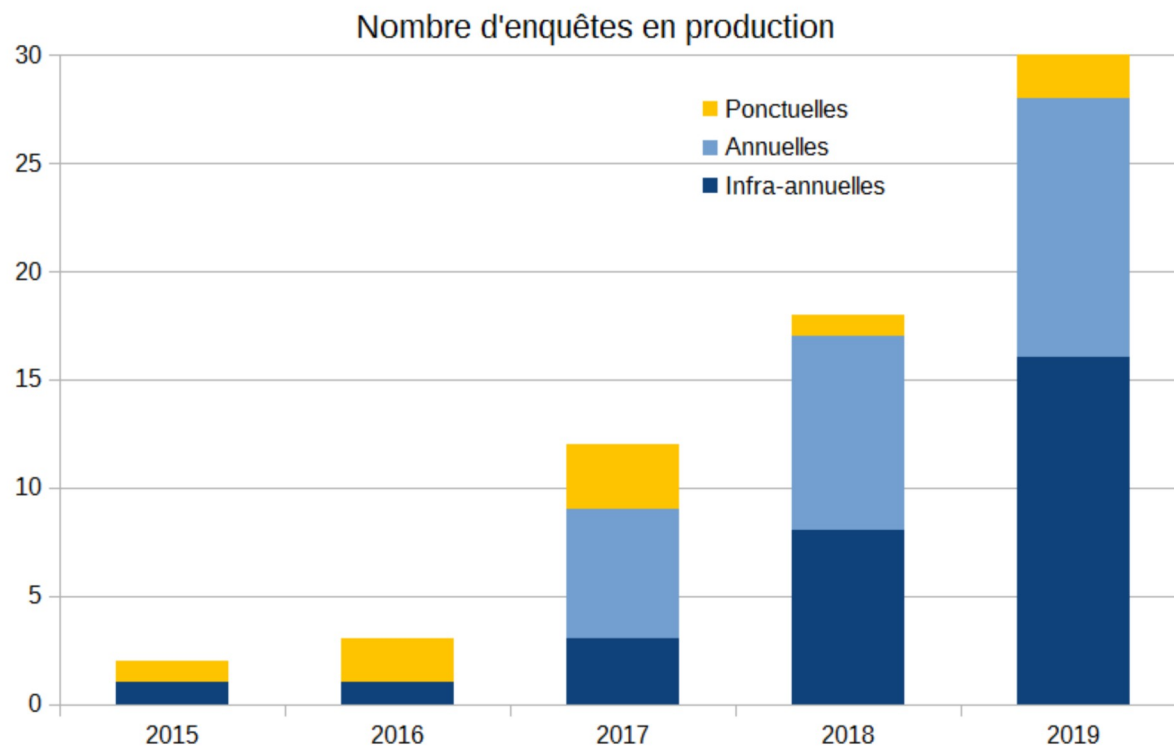


- Coltrane uses or proposes a set of mutualized services :
  - Production and sending of Mails/letters personalized with a specific tool (6 models are defined for all the surveys and filled with the producer data)
  - Production of Questionnaires in “Pdf” format personalized (the model of the questionnaire is generated by Eno and filled with the producer data)
  - Sending of E-mails during the collection if needed

Advantages : a coherent communication (from one survey to another one)

- From the portal, the list of surveys or the questionnaire, the contact can request assistance via a form or via the phone
- if the contact needs technical assistance, he will be directed to a specialized team at INSEE for online help
- if he needs help to answer a question, he will be directed to the managers in charge of the survey
- the redirection is automatic and depends on where the contact is on the website when he needs help

- 2014-2015 : one quarterly, one aperiodic
- 2016 : 2 aperiodic
- 2017 : 1 monthly, 2 quarterly, 6 annual, 3 aperiodic
- 2018 : 4 monthly, 4 quarterly, 9 annual, 1 aperiodic
- 2019 : Annual sectoral survey in February, 9 more (at the end of 2019 : “all” the surveys), another MSO In 2020



# Thank you

## Any questions ?

### Join us on:

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