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## Setting up a sample management service for cross-national internet surveys

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► **To cite this version:**

Geneviève Michaud. Setting up a sample management service for cross-national internet surveys. European Survey Research Association Conference 2021 (ESRA), European Survey Research Association, Jul 2021, online, France. 10.5281/zenodo.5137051 . hal-03919070

**HAL Id: hal-03919070**

**<https://sciencespo.hal.science/hal-03919070>**

Submitted on 2 Jan 2023

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# Setting up a sample management service for cross-national internet surveys

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**European Survey Research Association Conference**

23-07-2021

[DOI:10.5281/zenodo.5137051](https://doi.org/10.5281/zenodo.5137051)



funded by the EC under SSHOC & ESS-SUSTAIN-2 (grants #823782 and #871063)

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## The project



**What is this service for?**

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## securing personal data

Minimized data flows.

Decentralised and privacy-compliant handling of panelist data.

User roles defined on a need-to-know basis.



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# collaboration & orchestration

Centralised management of survey fielding orchestration:

- content edition monitoring
  - questionnaire and message edition
  - questionnaire and messages translation
- fieldwork coordination
  - questionnaire publication
  - sending invites & reminders



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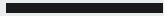
## flexible contact modes

Messages can be send to panelists by email or short text messages.

The two modes of contact can be intertwined.



# **WPSS Information System**

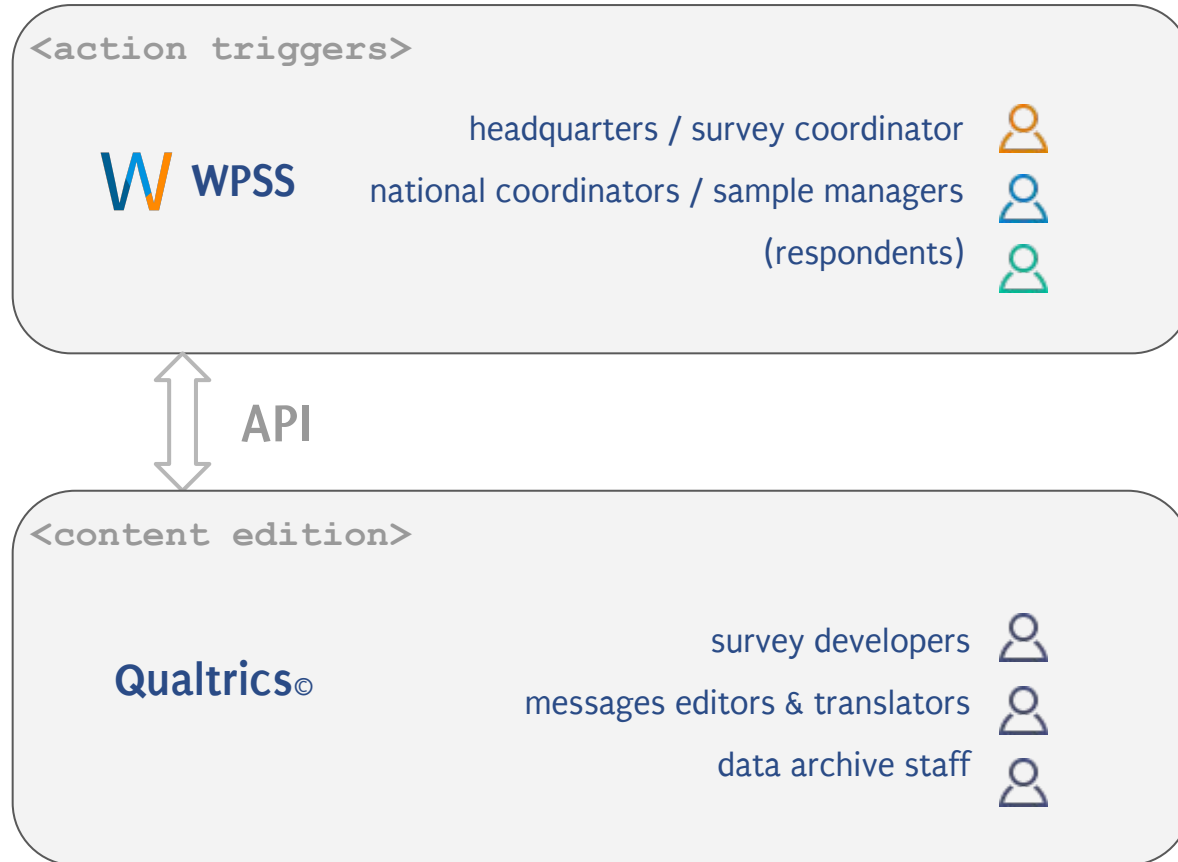




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# A two-fold information system

- prior experience with [ELIPSS](#) french online probabilistic panel software suite
- focus on the **missing** software module
- keep control over the technical stack (django, Python, Celery)
- look for easy deployment (docker containers)



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# Survey platform configuration

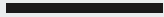
## Required Qualtrics license **options**

- data isolation (and encryption)
- contact de-duplication
- SMS option





## Required Qualtrics users and **components**:


- an operational user
- a shared library
- an isolated contact directory





# A time-lapse demo






XM    


+ Add new folder 

<    Last modified 

Search projects... 

All projects	9
> Shared with me	1
Uncategorized	7
ESRA2021	1

**Today**

ESRA_2021	New	Activate	
Modified Jul 17, 2021	Status	Collaborate	



### Collaborate on Project: ESRA\_2021



[User and Group Address Book](#)

User

Edit

View Reports

Activate/Deactivate

Copy

Distribute

French Translator (french-translator@laposte.net)

<input checked="" type="checkbox"/> Details (1/14)	<input type="checkbox"/> Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Edit Surveys	<input checked="" type="checkbox"/> Translate Surveys					
<input type="checkbox"/> Copy Survey Questions	<input type="checkbox"/> Set Survey Options					
<input type="checkbox"/> Create Response Sets	<input type="checkbox"/> Edit Survey Questions					
<input type="checkbox"/> Delete Survey Questions	<input type="checkbox"/> Edit Survey Flow					
<input type="checkbox"/> Use Text Analysis	<input type="checkbox"/> Use Blocks					
<input type="checkbox"/> Use Triggers	<input type="checkbox"/> Allow Tallying Screened Out Responses					
<input type="checkbox"/> Use Advanced Quotas	<input type="checkbox"/> Use Reference Blocks					



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Second, share the survey with a WPSS operational user

This step ensures that the survey is available for distribution on WPSS.



**XM** **PROD**

Survey Library   Graphics Library   Files Library   **Messages Library**

+ New Message   Search ...

All Folders 24

Uncategorized 1

**ESRA** 3

TEST with 12 Countries 18

test\_1 2

+ New Folder

ESRA

Filter by Message Type


Show All

Description	Type	Last Modified	
ESRA - Email content - Invite	Email Invite	Jul 20, 2021 11:40 AM	
ESRA SMS Invite	SMS Invite	Jul 19, 2021 6:35 PM	
ESRA - Subject email invite	Email Subject	Jul 17, 2021 3:28 PM	





### Edit Message Translate Message



Message Type: Invite Emails Destination Folder: ESRA

Description: ESRA - Email content - Invite Language: English (US)

Rich text editor toolbar: Font, Size, B, I, U, Less..., Text color, Background color, Bulleted list, Numbered list, Decrease indent, Increase indent, Undo, Redo, Link, Unlink, Table, Image, Quote, Code

```
Hi <span style="background-color:#f1c40f;">${m://FirstName}</span>, <br />
<br />
Would you be kind enough to participate in a short survey, by clicking the link below:<br />
<a href="${e://Field/survey_link}">${e://Field/survey_link}</a>
<br />
Thank you!
```

Cancel ✔ Save



**XM** ☰
PROD ▾

?
🔔
G

Survey Library
Graphics Library
Files Library
Messages Library

Return to Messages Library

### ESRA - Email content - Invite

<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>English (US) <span style="font-size: 0.8em;">▾</span></span> <span style="font-size: 1.5em;">↓</span> </div>	<div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>Italian <span style="font-size: 0.8em;">▾</span></span> <span style="font-size: 0.8em;">Delete Translation</span> <span style="background-color: #28a745; border-radius: 50%; padding: 2px 5px; font-weight: bold; color: white;">100%</span> <span style="font-size: 1.5em;">↓</span> <span style="font-size: 1.5em;">↑</span> </div>
<p>Hi <span style="background-color: yellow;">\${m://FirstName}</span>,</p> <p>Would you be kind enough to participate in a short survey, by clicking the link below:  <a href="#">\${e://Field/survey_link}</a></p> <p>Thank you!</p>	<div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <span style="font-size: 0.8em;">(A)</span> <span style="font-size: 0.8em;">🖼</span> <span style="font-size: 0.8em;">Font</span> <span style="font-size: 0.8em;">▾</span> <span style="font-size: 0.8em;">Size</span> <span style="font-size: 0.8em;">▾</span> <span style="font-weight: bold; font-size: 0.8em;">B</span> <span style="font-style: italic; font-size: 0.8em;">I</span> <span style="text-decoration: underline wavy; font-size: 0.8em;">U</span> <span style="font-size: 0.8em;">📄</span> <span style="font-size: 0.8em;">Less...</span> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <span style="font-size: 0.8em;">📄</span> <span style="font-size: 0.8em;">📺</span> <span style="font-size: 0.8em;">A ▾</span> <span style="font-size: 0.8em;">A ▾</span> <span style="font-size: 0.8em;">☰</span> <span style="font-size: 0.8em;">☰</span> <span style="font-size: 0.8em;">☰</span> <span style="font-size: 0.8em;">←</span> <span style="font-size: 0.8em;">→</span> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <span style="font-size: 0.8em;">☰</span> <span style="font-size: 0.8em;">☰</span> <span style="font-size: 0.8em;">☰</span> <span style="font-size: 0.8em;">☰</span> <span style="font-size: 0.8em;">☰</span> <span style="font-size: 0.8em;">🔗</span> <span style="font-size: 0.8em;">💬</span> <span style="font-size: 0.8em;">I<sub>x</sub></span> </div> <p>Ciao <span style="background-color: yellow;">\${m://FirstName}</span>,</p> <p>Sarebbe così gentile da partecipare a un breve sondaggio, cliccando sul link qui sotto:  <a href="#">\${e://Field/survey_link}</a></p> <p>Grazie !</p>



Panelists
Panels
National coordinators
Surveys
Messages



▼ Log out

Headquarters →

## Surveys

All the surveys currently available on Qualtrics

Name	Invites created	Panels concerned	Qualtrics status
<a href="#">ESRA_2021</a>	0	0	Draft



👤
Panelists Panels National coordinators Surveys Messages

Headquarters →

# Messages

Messages drafted and translated on Qualtrics

Description ^	Category ^	Translations
ESRA - Email content - Invite	<span style="background-color: #34495e; color: white; padding: 2px 5px; border-radius: 3px;">Invite</span>	<span style="background-color: #f0f0f0; padding: 2px 5px; border: 1px solid #ccc; margin-right: 5px;">English (en)</span> <span style="background-color: #f0f0f0; padding: 2px 5px; border: 1px solid #ccc;">Italian (it)</span>



Headquarters →

# Messages

Messages drafted and translated on Qualtrics

Search

Description ^	Category
ESRA - Email content - Invite	Invite
Invitation email_TEST 2	Invite
test_1 invitation email	Invite

Italian (it) ×

Ciao `#{m://FirstName}`,

Sarebbe così gentile da partecipare a un breve sondaggio, cliccando sul link qui sotto:

`<a href="#{e://Field/survey_link}">#{e://Field/survey_link}</a>`

Grazie !

Close

English (en) Finnish (fi)  
h (sv)  
French (fr) isl (isl) Ita  
Slovene (sl) Swedish (sv)



Panelists Panels National coordinators Surveys Messages 🔔 Log out ↶

Headquarters → Panels →

# ESRA-France

Assigned national coordinators and distributed surveys

### Assign national coordinator

Select managers \*

wpsstest@gmail.com  
wpsstest2@gmail.com  
fr-sample-manager@study.eu

[Assign](#)



Help Log out

Panelists Surveys

National coordinators / Panels / ESRA\_2021 →

## / Panelists

Panelist accounts belonging to this panel

0  
Total

0  
Active

0  
Deactivated

[+ New panelist](#) [↑ Import \(CSV\)](#) [↓ Export \(CSV\)](#) [Additional Variables](#) [Update panel level variables](#)

Type to Search Clear Per page 10

ID	First name	Last name	Sex	Email	Phone	Language	State	Qualtrics	Additional variables
There are no records to show									

« ‹ 1 › »



Help Log out

Panelists Surveys

National coordinators / Panels / ESRA\_2021 →

## / Panelists

Panelist accounts belonging to this panel

195 new members. 5 members updated. 0 rows skipped.

5  
Total

0  
Active

0  
Deactivated

+ New panelist ↑ Import (CSV) ↓ Export (CSV) Additional Variables ✎ Update panel level variables

Clear Per page

ID	First name	Last name	Sex	Email	Phone	Language	State	Qualtrics
DE1			Female	cid_2258423@qxsms.com	✓		Never logged in	✓
FR2			No answer	cid_8169879@qxsms.com	✓		Never logged in	✓
LT3			No answer	cid_3312554@qxsms.com	✓		Never logged in	✓





National coordinators → Panels → ESRA-Italy → Panelists →

## Update panelist information

Panelist ID

Ess id \*

First name

Last name

Sex \*

Email address

Phone number

Opt out reason

Delete data

Out of country

No incentive

No letter

No text

No email

Opinion Study Powered by WPSS v.F27AB78



## Réinitialiser le mot de passe

Entrez votre adresse électronique pour recevoir un lien permettant de réinitialiser votre mot de passe.

Email \*

Envoyer

Annuler

[Utiliser le numéro de téléphone](#)



The screenshot shows an email client interface with a yellow header bar. The header bar contains icons for Home, Mail, Agenda, and Contacts, with corresponding text labels below them. The main content area shows an email with the subject "Réinitialisation du mot de passe sur qxsms.cdsp.sciences-po.fr". The email header includes the sender "De : wpss@sciencespo.fr" and the recipient "A : fr-panelist-wpss@laposte.net". The email body contains the text: "Nous vous avons envoyé un email parce que vous avez demandé à changer le mot de passe de votre compte. Veuillez vous rendre sur la page ci-dessous et choisir votre nouveau mot de passe: <http://qxsms.cdsp.sciences-po.fr/password-change/reset/Mzc1/5se-35f1d9d1640731e81636/>". At the bottom of the email, there are three buttons: "Répondre", "Transférer", and "Supprimer".

Accueil Mail Agenda Contacts

Répondre Supprimer Déplacer vers Indésirable Plus ...

Réinitialisation du mot de passe sur qxsms.cdsp.sciences-po.fr

De : wpss@sciencespo.fr Aujourd'hui, à 15:59 (il y a quelques secondes)  
A : fr-panelist-wpss@laposte.net 3Ko

Nous vous avons envoyé un email parce que vous avez demandé à changer le mot de passe de votre compte

Veuillez vous rendre sur la page ci-dessous et choisir votre nouveau mot de passe:

<http://qxsms.cdsp.sciences-po.fr/password-change/reset/Mzc1/5se-35f1d9d1640731e81636/>

Répondre Transférer Supprimer



## Choisir un nouveau mot de passe

Nouveau mot de passe \*

- Votre mot de passe ne peut pas trop ressembler à vos autres informations personnelles.
- Votre mot de passe doit contenir au minimum 8 caractères.
- Votre mot de passe ne peut pas être un mot de passe couramment utilisé.
- Votre mot de passe ne peut pas être entièrement numérique.

Confirmation du nouveau mot de passe \*

Confirmer mot de passe

Annuler



Keeping an accurate email address / mobile phone number

Email ^	Phone ^	Language ^	State ^	Qualtrics ^
fr-panelist-wpss@laposte.net		FR	Has logged in	

Email ^	Phone ^	Language ^	State ^	Qualtrics ^
it-panelist-wpss@laposte.net		IT	Never logged in	



Mes enquêtes Aide

fr-panelist-wpss@laposte.net Déconnexion

Votre mot de passe a été mis à jour!

## Etude d'Opinion pour la France

Bienvenue France

### Dernières enquêtes

Aucune enquête disponible

### Autres actions

Modifier vos coordonnées

Aide



Headquarters → Surveys → ESRA\_2021 →

## New distribution

Set parameters for this distribution

### Description

### Panels

### Target panelists \*

- All  
 Survey completed  
 Survey not completed

### Contact mode \*

- Email  
 SMS

### Select subject \*

### Select message \*

- Fallback contact mode



[Panelists](#) [Panels](#) [National coordinators](#) [Surveys](#) [Messages](#)



[Log out](#)

Successfully created distribution

[Headquarters](#) → [Surveys](#) → [ESRA\\_2021](#) →

## Distribution Not sent

Panels associated with this distribution

[Edit](#)

[Send distribution](#)

ESRA Test distribution

**Expiration date:** 16/08/2021 14:17:22

Panel	Panelists
<a href="#">ESRA-France</a>	1
<a href="#">ESRA-Italy</a>	1



[Panelists](#) [Panels](#) [National coordinators](#) [Surveys](#) [Messages](#)[Log out](#)[Headquarters](#) → [Surveys](#) → [ESRA\\_2021](#) →

## Distribution Sent

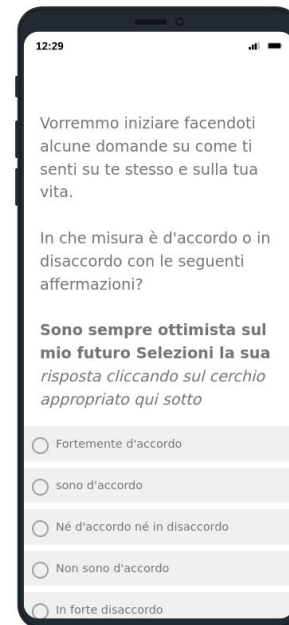
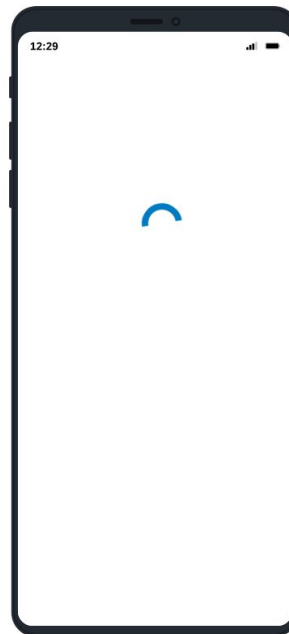
Panels associated with this distribution

[Edit](#)

ESRA Test distribution

**Expiration date:** 16/08/2021 14:17:22

Panel	Invited	Started	Finished
<a href="#">ESRA-France</a>	1	0	0
<a href="#">ESRA-Italy</a>	1	0	0





### Connexion

Première connexion

Numéro de téléphone \*

France +33

+33766554433

Mot de passe \*

Connexion

Utiliser l'adresse électronique

Mot de passe oublié ?

Powered by WPSS v.F27AB78

### Etude d'Opinion pour la France

Bienvenue France

#### Dernières enquêtes

17 juillet 2021 14:19

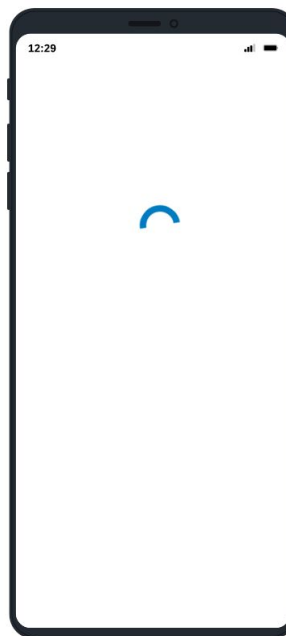
ESRA\_2021

Non commencé

#### Autres actions

Modifier vos coordonnées

Aide



12:29

Nous voudrions commencer en vous posant quelques questions sur vos impressions au sujet de vous-même et de votre vie. Dans quelle mesure êtes-vous en accord ou en désaccord avec les affirmations suivantes ?

**Je suis toujours optimiste en ce qui concerne mon avenir**

*Veillez sélectionner votre réponse en cliquant sur le cercle de la réponse de votre choix*

Entièrement d'accord

D'accord

Ni d'accord ni pas d'accord

Pas d'accord



Headquarters → Surveys → ESRA\_2021 →

## Distribution Sent

Panels associated with this distribution

[Edit](#)

ESRA Test distribution

**Expiration date:** 16/08/2021 14:17:22

Panel	Invited	Started	Finished
<a href="#">ESRA-France</a>	1	0	0
<a href="#">ESRA-Italy</a>	1	1	0



The data archive staff downloads a survey dataset from the survey platform.



---

## Key features

- flexible design
- multilingual support
- flexible contact modes
- separated content management
- centralized fieldwork operation
- decentralized panel level management
- panelist user experience
- online wiki

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# Thank you

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