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SERISS (Synergies for Europe’s Research Infrastructures in the Social Sciences) aims to exploit synergies, foster collaboration and develop shared standards between Europe’s social science infrastructures in order to better equip these infrastructures to play a major role in addressing Europe’s grand societal challenges and ensure that European policymaking is built on a solid base of the highest-quality socio-economic evidence.

The four year project (2015-19) is a collaboration between the three leading European Research Infrastructures in the social sciences – the European Social Survey (ESS ERIC), the Survey of Health Ageing and Retirement in Europe (SHARE ERIC) and the Consortium of European Social Science Data Archives (CESSDA AS) – and organisations representing the Generations and Gender Programme (GGP), European Values Study (EVS) and the WageIndicator Survey.

Work focuses on three key areas: Addressing key challenges for cross-national data collection, breaking down barriers between social science infrastructures and embracing the future of the social sciences.

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Summary

This report provides the industry style software manuals for the Sample CTRL and Case CTRL software developed by CentERdata for SHARE, EVS, ESS and GGP. Together these manuals form deliverable (D4.6). Deliverable D4.6 is related to WP4 Interactive tools for cross-national surveys, task 4.2: Fieldwork management tool extensions -- for sample management and CAPI. The lead partner for this task is SHARE (MEA); CentERdata (SHARE partner) has been responsible for the work.

SHARE has developed a set of tools that are used to manage all fieldwork processes. These distribute addresses to interviewers, monitor their contact attempts, install the correct version of the questionnaire, give access to pre-loaded data, record fieldwork success, and transmit the data back to the agency and central coordination.

In the first part of the task, CentERdata expanded the applicability of the tooling to newer Windows, Android and iOS operating systems to also support handheld tablet and smart phones use. Besides that the installation process was made easier and synchronisation and speed were further improved. And the household grid was reprogrammed in such a way that it can meet the needs of all cross-national survey projects in SERISS (SHARE, EVS, ESS, or GGP).

In the second part of the task CentERdata managed to improve the detailed fieldwork statistics on the household, respondent, interviewer, sample, and subsample level to be used for real-time fieldwork monitoring at the agencies, and adaptable to the special needs of SHARE, EVS, ESS, and GGP.

The final part of the task, documenting the software, was meant to result in industry-quality manuals with a more professional appearance. The enclosed deliverables are the results of that work. In the new manuals for Sample and Case CTRL the screenshots and examples, wording and text flow and the documentation of import and export files improved a lot. The manuals, their format and the type of content covered, serve as a template to be used by SHARE, EVS, ESS, and GGP. However, updating the content of the manuals for each survey will still require some work since the ways of working of these survey projects differ a lot, not only between surveys, but also within a survey between rounds/waves. The enclosed manuals focus on the SHARE wave 8 Field Rehearsal that will take place in April and May 2019.
Annex 1 Guide for the SHARE Sample CTRL: software manual

Annex 2 Interviewers Guide for the SHARE Case CTRL: software manual