

Global Data Barometer 2nd Edition

Survey Manual

1. Introduction

This document serves as a reference for researchers, coordinators and reviewers involved in data collection for Global Data Barometer, providing a thorough explanation of how the data collection tool works. It will outline the proper utilisation of the data collection tool, and offer essential guidelines to ensure a smooth and effective data collection phase for the project.

Please read the entire Introduction chapter first, before you dive into any role-specific chapter.

- For researchers, please read the [User Guide: Researcher](#)
- For Coordinators, please read the [User Guide: Coordinator](#)
- For Reviewers, please read the [User Guide: Reviewer](#)

1.1 Quick Facts of the Tool

For the Global Data Barometer's data collection, the GDB team has chosen to use the Survey Solution, a robust data collection software developed by the World Bank.

All data collection activities, including but not limited to viewing, starting, submitting, and reviewing surveys, will all take place on a GDB's dedicated instance of the Survey Solution.

You can access the Data Collection Tool (shortened as “the Tool” below) at the following URL via your preferred web browser: <http://datacollection.globaldatabarometer.org/>

Remember to use one device throughout the data collection process to maintain consistency. Once you have completed your work, always remember to log out to ensure the security of your data.

1.2 How Data Collection works

Remember the GDB survey is divided into a set of action areas, of which each contains one or few indicators. During the data collection, each researcher will be assigned a set of action areas. **And researchers are instructed to follow the order for action areas specified in the [research manual](#).**

Any submitted action areas will be immediately forwarded to the corresponding coordinator for review. If approved, it will be ready for a headquarter reviewer to conduct a second round review. Comments on specific questions will be left in each survey for the researcher to make clarifications or corrections.

After the headquarter reviewer's review, the action area will be ready for the thematic review, where the GDB Team and thematic partners will evaluate the responses from the researchers. If everything is in order, it will be approved, completing the data collection process.

You should refer to the [research manual](#) and [review manual](#) for more information on how the process works.

1.3 Key Definitions

There are four roles involved in the data collection process and have its corresponding role account in the Tool:

- **Researcher (interviewer):** a researcher is responsible for collecting data and completing a set of action areas for a specific country. Researchers are referred to as 'Interviewers' in the Tool.
- **Coordinator(Supervisor):** a coordinator is responsible for supervising the data collection progress, conducting reviews, and facilitating communication between researchers and reviewers. Coordinators are referred to as 'Supervisor' in the Tool.
- **Reviewer (Headquarter):** a reviewer is responsible for reviewing action areas. Reviewers are referred to as 'Headquarter' in the Tool.
- **GDB Team (Headquarter):** The GDB team is responsible for supervising the overall progress, controlling data quality, managing accounts, and incorporating thematic partners' feedback into the final round review. Please note that the GDB team will also use a 'Headquarter' role account, so their actions such as "Approve" or "Reject" will also be considered being done by 'Headquarters' in the Tool.

During the data collection process, each researcher is required to complete a specific number of action areas in a given order (Please refer to the [Researcher Manual](#)). While we use "action area" in GDB study (see [Methodology Manual](#)), the data collection tool use different terms in various parts to refer to the similar concept, and you should

become familiar with these terminologies before starting to use the tool to avoid potential confusion:

- **GDB Survey:** this refers to the complete expert survey of the Global Data Barometer
- **Action Area:** each *GDB survey* is divided into a set of action areas, each covering one or more indicators.
- **Survey and Questionnaire:** The data collection tool refers to each *action area* as a *survey* or *questionnaire*. They are interchangeable and below we will use the term “survey” throughout this document to avoid confusion.
- **Interview:** An interview is an instance of a specific survey (action area) assigned to a specific researcher for a specific country. You can consider in most cases that “interview” and “survey” are interchangeable.
- **Assignment:** Assignment refers to the action of assigning a specific researcher with an action area survey. This is a Tool-specific term, and In most cases, “assignment” is irrelevant to your activities and you can simply ignore it.

1.4 Statues of a Survey in the Tool

An action area, also referred to as a survey by the data collection tool, can have the following Tool-specific statuses throughout the data collection process:

Status	Description
Interviewer Assigned	a researcher has started(opened) a specific survey and it is in-progress. The survey should appear in the ‘Started’ tab under the interview dashboard for the researcher.
Completed	a researcher has completed and submitted a survey. The survey should appear in the ‘Completed’ tab under the interview dashboard for the researcher.
Rejected by Supervisor	The status of a survey, rejected by a coordinator, will become “Rejected by Supervisor”; It will be automatically returned to the researcher and appear in the “Rejected” tab under the Interview dashboard of the Tool.
Rejected by Headquarter	The status of a survey, rejected by a headquarter reviewer/GDB team, will become “Rejected by Headquarter”; It will be automatically returned to the responsible coordinator. Unless the coordinator disagrees with the rejection, the coordinator is supposed to reject the survey so it can be returned to the researcher to address any comments.

Approved by Supervisor	The status of a survey, approved by a coordinator, will become “Approved by Supervisor”; It will be automatically forwarded to the GDB headquarter reviewer.
Approved by Headquarter	The status of a survey, approved by a headquarter reviewer, will become ‘Approved by Headquarter’. And it is the end status in the Tool but please bear in mind that ‘Approved by Headquarter’ does not mean the survey will not be rejected again by the GDB team during the thematic review if any new clarification is required.

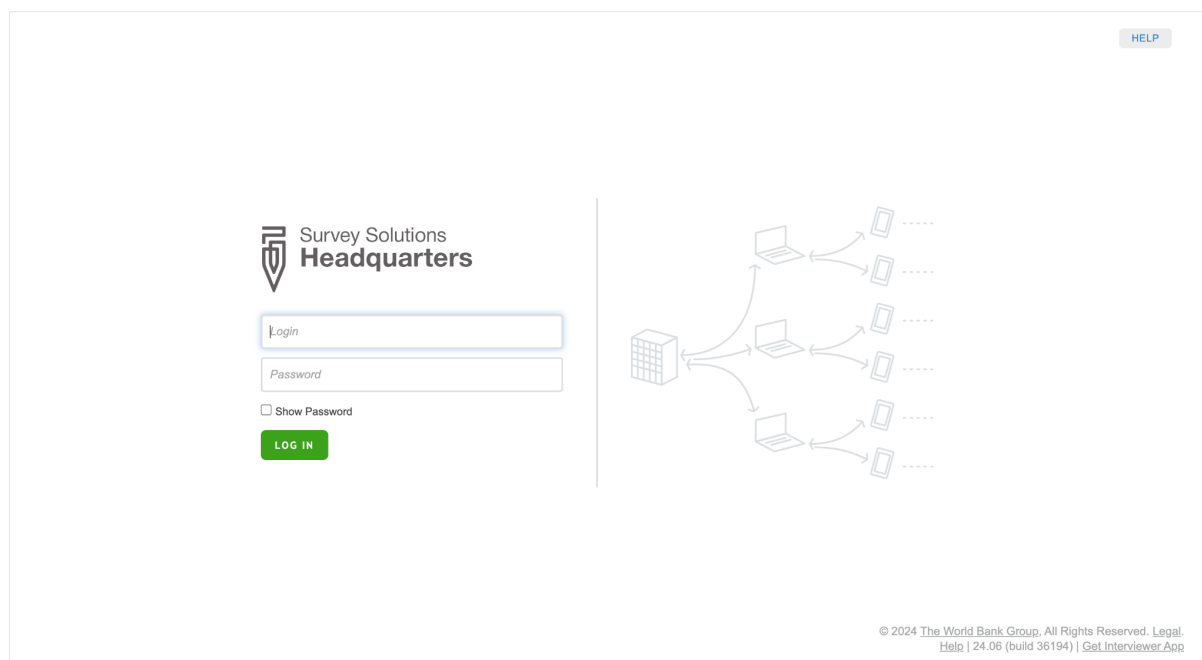
1.5 Checklist before proceeding

Please check the following list before you proceed to complete any tasks on the Tool:

- [✓] You have already received the credentials from your coordinator or the GDB team. Please be advised to securely store credentials, and during your first login, reset the password with the exact same one.
- [✓] You have a stable internet connection. To ensure smooth connection, please avoid using any other software or applications that may compete for bandwidth, such as YouTube, messaging apps, games, or music players.
- [✓] You have your preferred web browser ready. Please be advised not to use any experimental or beta versions of web browsers.
- [✓] You have access to the [“Research Team Materials and Guidance” website](#), where you can find manuals, videos, and dashboards that support your work.

2. User Guide: Researcher

2.1 Access the Tool



You should have received your credentials from your coordinator or the GDB team. Access the link: <http://datacollection.globaldatabarometer.org/> and enter your username and password to log into the Tool.

When you access the Tool for the first time, you will be asked to reset the password. **Please remember to use the exact same password to reset it** so it's possible for the coordinator to help you look up the password whenever you forgot or lost it.

In case you do forgot or lost the credentials, please reach out to your regional coordinator.

Guidance on how to conduct the data collection is available in the [GDB Research Manual](#).

2.2 Interview(Survey) Dashboard

After you log into the Tool, Interviews (Surveys) available for you to complete are displayed on the first screen. We refer to this interface as the “Interview Dashboard”.

Default Workspace Create new Started Rejected Completed Map Dashboard test_researcher ▾							
Create new							Search...
ASSIGNMENT ▾	INTERVIEWS NEEDED	QUESTIONNAIRE ▾	Identifying Questions	UPDATED ON ▾	CREATED ON ▾	COMMENT ▾	CALENDAR EVENT
18	1	(ver. 1) Action Area - Company Register	Cluster: Company Information, Action Area: Company Register, Select a country: Costa Rica, Select a regional hub: ILDA	Aug 19, 2024 14:58	Aug 19, 2024 14:58	for internal test	
15	1	(ver. 1) Action Area - Political integrity interoperability	Cluster: Political Integrity, Action Area: Political integrity interoperability, Select a country: Costa Rica, Select a regional hub: ILDA	Aug 19, 2024 14:53	Aug 19, 2024 14:53	for internal test	
13	1	(ver. 1) Action Area - Lobbying	Cluster: Political Integrity, Action Area: Lobbying, Select a country: Costa Rica, Select a regional hub: ILDA	Aug 19, 2024 14:51	Aug 19, 2024 14:51	for internal test	
12	1	(ver. 1) Action Area - Interest and asset declarations	Cluster: Political Integrity, Action Area: Interest and asset declarations, Select a country: Costa Rica, Select a regional hub: ILDA	Aug 19, 2024 14:51	Aug 19, 2024 14:51	for internal test	
11	1	(ver. 1) Action Area - Political Finance	Cluster: Political Integrity, Action Area: Political Finance, Select a country: Costa Rica, Select a regional hub: ILDA	Aug 19, 2024 14:50	Aug 19, 2024 14:50	for internal test	

As you can see on the top black navigation bar, the interface contains four tabs:

- **Create new:** This list shows all pending surveys that need to be started. Please note any started surveys will be moved from this tab to ‘started’.
- **Started:** This list shows all surveys that have been opened and in-progress
- **Rejected:** This list shows all surveys marked as “Rejected” by the coordinators, reviewers, or GDB Team. You are advised to regularly check the tab to identify surveys rejected.
- **Completed:** This list shows all surveys you have submitted (awaiting review and approval). Surveys that are approved by the coordinators, reviewers, or GDB team will disappear from these categories, and will no longer be available unless otherwise it gets rejected later.

2.2.1 Start a New Survey

You can click on any interview, then click the pop-up menu item ‘Start new interview’ to open up a particular survey to fill in. Please note that once you start a survey, it will be moved from the “Create new” tab to the “Started” tab.

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Default Workspace Create new Started Rejected Completed								Map Dashboard	test_researcher
Create new								Search...	
ASSIGNMENT	INTERVIEWS NEEDED	QUESTIONNAIRE	Identifying Questions	UPDATED ON	CREATED ON	COMMENT	CALENDAR EVENT		
18	1	(ver. 1) Action Area - Company Register	Cluster: Company Information, Action Area: Company Register, Select a country: Costa Rica, Select a regional hub: ILDA	Aug 19, 2024 14:58	Aug 19, 2024 14:58	for internal test			
15	1	(ver. 1) Action Area - Political integrity interoperability	Cluster: Political Integrity, Action Area: Political integrity Start new interview Edit Calendar Event	Aug 19, 2024 14:53	Aug 19, 2024 14:53	for internal test			
13	1	(ver. 1) Action Area - Lobbying	Cluster: Political Integrity, Action Area: Lobbying, Select a country: Costa Rica, Select a regional hub: ILDA	Aug 19, 2024 14:51	Aug 19, 2024 14:51	for internal test			
12	1	(ver. 1) Action Area - Interest and asset declarations	Cluster: Political Integrity, Action Area: Interest and asset declarations, Select a country: Costa Rica, Select a regional hub: ILDA	Aug 19, 2024 14:51	Aug 19, 2024 14:51	for internal test			
11	1	(ver. 1) Action Area - Political Finance	Cluster: Political Integrity, Action Area: Political Finance, Select a country: Costa Rica, Select a regional hub: ILDA	Aug 19, 2024 14:50	Aug 19, 2024 14:50	for internal test			

2.2.2 Resume an Already Started Survey

Any survey that has already been started will be displayed in the 'Started' tab. You can left-click on any survey and then click the pop-up menu item 'Open' to continue from where you left off.

Default Workspace

Create new

Started

Rejected

Completed

Map Dashboard

test_researcher

Filters

Questionnaire

All questionnaires

Questionnaire version

All versions

Assignment

All assignments

Started

Search...

INTERVIEW KEY	ASSIGNMENT	Identifying Questions	UPDATED ON	RECEIVED BY TABLET	CALENDAR EVENT
10-27-50-96	14	regional hub: ILDA, country: Costa Rica, Action Area: Right to information, Cluster: Political Integrity	Aug 30, 2024 20:25	No	
46-60-72-58	16	regional hub: ILDA, country: Costa Rica, Action Area: Public Procurement, Cluster: Public Procurement	Aug 30, 2024 20:25	No	
98-06-90-20	9	regional hub: ILDA, country: Costa Rica, Action Area: Data Literacy, Cluster: Critical Competencies -	Aug 29, 2024 15:41	No	

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[New Version Available: 24.06.4 \(build 36544\)](#)

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 Help | 24.06 (build 36194) | Get Interviewer App
 New Version Available: 24.06.4 (build 36544)

At a later stage of the data collection, you may also find interviews listed in the 'Rejected' tab and 'Completed' tab, depending on the actions taken by the coordinators, reviewers, and GDB teams (HQ). You can find details about them in the sections below.

2.3 Navigate and Complete an Survey

>>> 🗣️ You can also watch [this video](#) which demonstrates how to navigate and complete a survey.

2.3.1 Overview of the Interface

When you open up an interview, you will notice that the interface is divided into three parts:

The screenshot shows the survey interface for 'Public Procurement'. It is divided into three main sections: a black navigation bar at the top, a blue navigation panel on the left, and a green content area on the right. The black bar contains the date '16-91-07-81', the title 'Demo of Action Area - Public Procurement', and links for 'Original' and 'Help'. The blue panel shows a progress bar at '0%' and a list of sections: 'Action Area: Public Procurement', 'Governance: Public Procurement', 'Availability: Public Procurement', and 'Complete'. The green area displays a 'Please note' message about downloading guidance, a 'DOWNLOAD' button, and four selection questions: 'Select a regional hub' (ILDA), 'Select a country' (Costa Rica), 'Select the Cluster' (Public Procurement), and 'Select the Action Area' (Public Procurement). A 'GOVERNANCE: PUBLIC PROCUREMENT' button is at the bottom.

- **The Blue area:** it's the Navigation Panel, or 'Table of Content'. You can use it to Navigate the entire interview. It also displays a progress bar to let you know the percentage of questions you have completed. Please note this panel can be closed if you click the back arrow button at the top right corner of the blue area.
- **The Green area:** it's the interview content area where all guidance, interview questions and action buttons (e.g. 'download', 'Complete') are displayed.
- **The Black area:** it's the navigation menu bar of the Tool. You can click on the logo at the left corner to go back to the interview dashboard.

2.3.2 Cover Section: Survey Guidance and Identifying Questions

Every interview begins with a cover section, where you can download the action area guidance and complete a set of identifying questions if required.

****Please note:** Before beginning this questionnaire, download and read the complete guidance for this specific thematic area using the link below. The guidance provides a clear definition of the concept, examples of acceptable evidence for each indicator, and instructions on how to locate this evidence.**

[DOWNLOAD](#)

Select a regional hub

ILDA (Latin America and Caribbean)

Select a country

Costa Rica

Select the Cluster

Public Procurement

Select the Action Area

Public Procurement

Please note that the identifying questions will be used to help the coordinators, the reviewers and the GDB team to identify specific surveys. Identifying questions will be pre-populated when the GDB team is assigning a survey to a specific researcher. You do not need to answer anything, but just to double check whether information are correct. If not, please contact your coordinator.

2.3.4 Conditional Contents

Existence Question 1: Are there laws, policies, or regulations requiring collection of this information in any form?

☐ No

☒ They are being drafted or are not yet implemented. ×

☐ They exist and are operational.

Please provide brief details.

note that the blow question is in GREY and it is disabled for response ×

Please provide brief details.

In each survey, questions and even entire sections may adjust dynamically based on your answers to preceding questions. If a question or section doesn't need an answer, it will be displayed in grey and will be non-interactive (see above image where the question "Please provide brief details" is disabled for response)

14-05-15-59 Action Area Beneficial Ownership

Progress: 8/29 28%

Beneficial Ownership

— Governance: Beneficial ownership of companies

Existence

Elements

+ Availability: Beneficial ownership of companies

Complete

Existence Question 1: Are there laws, policies, or regulations requiring collection of this information in any form?

☒ No

☐ They are being drafted or are not yet implemented.

☐ They exist and are operational.

When the answer is "No", the "Elements" section is in **BLACK** and disabled for response and interaction

14-05-15-59 Action Area Beneficial Ownership

Progress: 10/44 23%

Beneficial Ownership

— Governance: Beneficial ownership of companies

Existence

Elements

+ Availability: Beneficial ownership of companies

Complete

Existence Question 1: Are there laws, policies, or regulations requiring collection of this information in any form?

☐ No

☒ They are being drafted or are not yet implemented. ×

☐ They exist and are operational.

When the answer is not "No", the "Elements" section is in **BLUE** and you can click on it to jump to that section.

Additionally, in the left navigation panel, the text colour of sections that are not enabled will change from blue to black, and you won't be able to click on them to jump to that section.

Please note that each survey contains the following conditional contents:

- Supporting Questions: Depending on your answer, different supporting questions asking for your explanation or evidence sources will be conditionally enabled for response.
- “Extent of Existence” Questions: For certain indicators, the “Extent of Existence” questions (as part of the Existence section) are conditionally enabled by your answers to preceding Existence questions.
- Elements Section: The entire Elements section is enabled by your answer to selected Existence questions.

2.3.3 Open-Text Questions

In the Tool, any open-text questions are subject to a maximum limit of 750 characters. This means you should be thoughtful about the content of your text responses, ensuring they are concise and to the point. Be selective with the information you include to fit within the character constraint while conveying your message effectively.

Also note that the text box in the Tool accepts only plain text, automatically stripping away any formatting from the entered text.

Please be aware that you have been granted access to a Google Drive folder (inquire with your coordinator if you have not received it). You can use this folder to upload evidence that is not available online or does not have a specific URL. Once the evidence is uploaded, you should copy and paste the Google Drive URL into the relevant text question box in the survey.

2.3.4 Save Progress/Draft

You do not need to complete one survey in a single session. The tool saves your progress automatically when you are online, so you can leave and resume the survey from where you left off.

Please note that you should use the same device and browser if possible to avoid any potential problems, and make sure your internet connection is working properly.

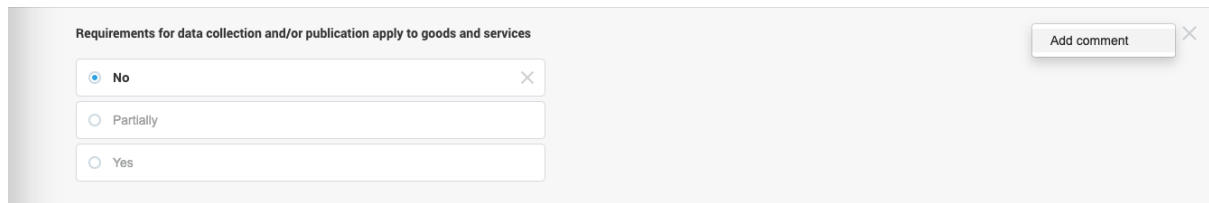
2.3.5 Comments

>>> 🗨️ You can also [watch this video](#) which demonstrates how to use the comments.

The Tool allows researchers to leave comments on any questions. Click on the three dots at the top left corner of each question, then select "Add comment" from the pop-up menu to leave your comments.

Please note that most survey questions include one or more supporting questions for you to provide explanations and sources. Those data will also be published as open data by GDB. Therefore, use comments as private notes to provide coordinators or reviewers with additional classifications or context that should not be made public. Please do not

use comments as a place to include evidence, or a space to ask questions on how to address a topic or assess a piece of evidence.



Requirements for data collection and/or publication apply to goods and services

☒ No

☐ Partially

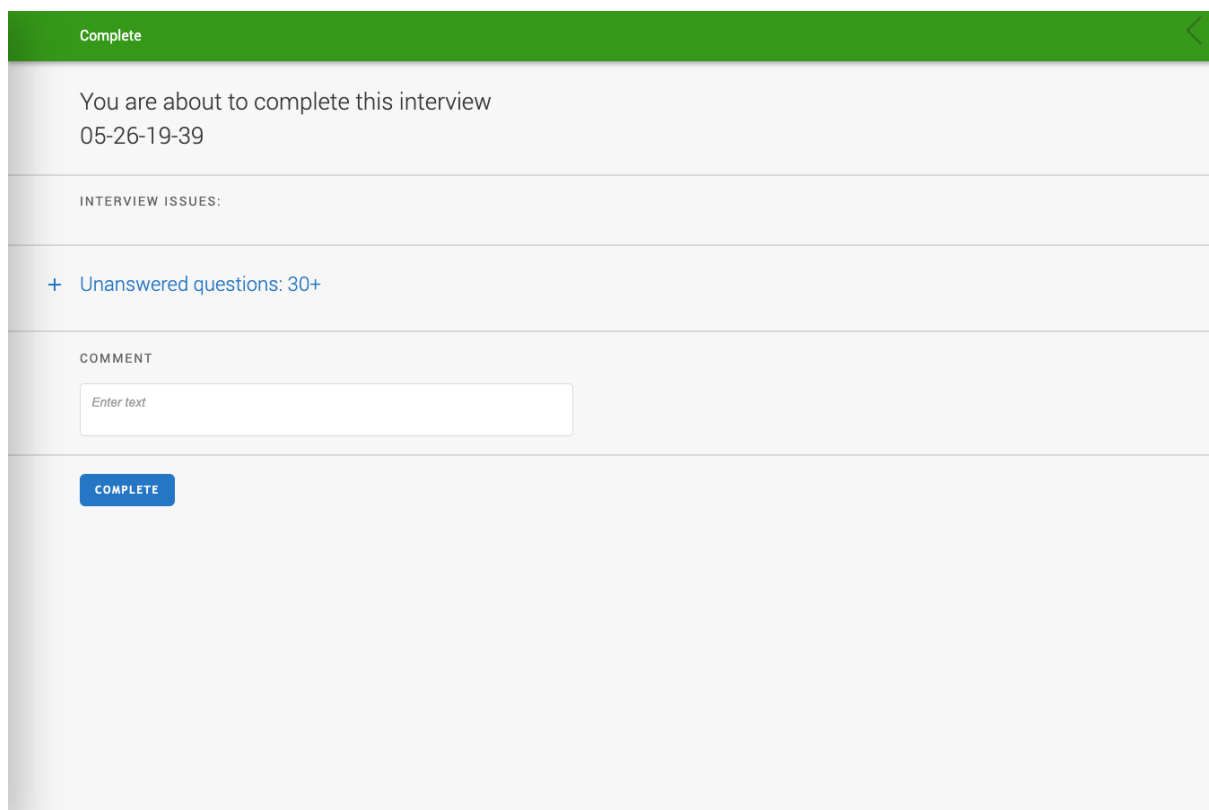
☐ Yes

Add comment

In addition to comments specific to questions, you can also leave an overall comment at the end of the interview. The "Complete" section of an interview provides one comment box if you need it.

2.3.6 Resolve Errors before Submission

When you reach the end of the survey, you will see the “Complete” section. This section will list issues identified in the survey, such as unanswered questions. Carefully review the list of issues and try to resolve them before clicking the “Complete” button to submit the interview. **Please note that every question enabled (displayed) in the survey is mandatory to answer.**



Complete

You are about to complete this interview
05-26-19-39

INTERVIEW ISSUES:

+ Unanswered questions: 30+

COMMENT

Enter text

COMPLETE

Make sure you are ready to submit before clicking the “Complete” button. Once submitted, the survey shall be immediately available for the coordinator to review, and **you are advised to NOT re-open the survey after submission.** If the survey gets approved by the coordinator, your survey will no longer be available in your ‘completed’ tab. At a

later stage, if the survey gets rejected, you will be able to find the survey again in your 'Rejected' tab.

2.3.7 After Submission

After the submission, the survey will be moved into the 'Completed' tab, and it's immediately available for the coordinators to review. **Please be aware that while the system permits reopening surveys in the 'Completed' tab, we strongly recommend against doing so.** If a survey is reopened while under review, it will abruptly halt the reviewer's ability to approve or reject, leading to process disruptions.

Once your survey is approved by the coordinators, reviewers, or GDB teams, it will be removed from the 'Completed' tab and become inaccessible. Therefore, adhere to the suggested survey order outlined in the Research Manual to ensure a smooth process. Failure to do so may result in difficulties when completing surveys rely on accessing responses from other surveys. For example, when completing the specific political integrity interoperability survey, you might need to refer to other political integrity surveys so do not submit those surveys before you have completed the interoperability one.

2.4 Rejected Survey and Re-submission

Do not be scared, as a "rejection" does not mean you failed to complete the survey. "Reject" is how the Tool phrases the action of returning the survey to the researcher for further clarification. You can always resubmit your survey after you resolve all comments from the coordinators, reviewers or GDB team.

2.4.1 Notification Email for Rejected Survey

We understand that it's not possible for you to monitor the status of surveys around the clock and address them in real time. To address this, we have implemented a technical system that conducts status checks and sends reminder notification emails every two hours, commencing at 0:00 am (UTC-4) each day.

The system is designed to send you a reminder email if a survey has been rejected by your coordinator and remains unresolved and not resubmitted during the most recent status check. It is important to note that you will not receive a notification if the survey was rejected but you had already resubmitted it prior to the latest status check.

For example, if your survey was rejected at 1:20pm (UTC-4) and was resubmitted at 1:58 pm (UTC-4), then it will not send you an email about the rejection at the 2:00pm (UTC-4) status check. But if you have not resubmitted it yet or resubmitted it at 2:01pm (UTC-4), then you'll receive an email about the rejection.

Please add the ‘help@globaldatabarometer.org’ into your safe senders list, so it won’t be filtered into spam folders. All emails sent to you will have a subject line starting with “[GDB]”.

2.4.2 Open the Rejected Survey

You can find the rejected surveys in the interview dashboard and open them to address comments.

By clicking on the "Rejected" tab in the top navigation menu, you will see the list of rejected surveys. Click on any of them, and then click on the pop-up menu item "Open" to open the survey.

Default Workspace

Create new

Started

Rejected

Completed

Map Dashboard

test_researcher

Filters

Questionnaire

All questionnaires

Questionnaire version

All versions

Assignment

All assignments

Rejected

Search...

Interview Key	Assignment	Identifying Questions	Updated On	Received by Tablet	Calendar Event
32-17-74-46	10	regional hub: ILDA, country: Costa Rica, Action Area: Data Reuse, Cluster: Critical Competencies- Open Edit Calendar Event	Aug 20, 2024 00:03	No	

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Help | 24.06 (build 36194) | Get Interviewer App

2.4.3 View and Address Comments

Action Area: Data Management

SUPERVISOR NOTE:

rejection comment by the coordinator

QUESTIONS WITH COMMENTS:

Existence Question 1: Is there evidence of government efforts to support and encourage data reuse?

Please explain your response.

Elements Question 1: The framework establishes a common definition of open data.

****Please note:** Before beginning this questionnaire, download and read the complete guidance for this specific thematic area using the link below. The guidance provides a clear definition of the concept, examples of acceptable evidence for each indicator, and instructions on how to locate this evidence.**

[DOWNLOAD](#)

 **Select a regional hub**

After opening the survey, you will find the “cover section” contains additional information:

- **Supervisor Note:** This comment was left when the coordinator clicked the 'Reject' button. It is supposed to offer a high-level explanation of why the survey was rejected and how to resolve the issues.
- **Questions with Comments:** This is a list of questions with comments that need to be resolved. **Do note it lists questions across indicators (sections), so you are advised to click on each question to jump directly to the particular question, view the comments, and take further actions.**

Is this data available online in any form?

☐ Data is not available online.

☐ Data is available, but not as a result of government action

☒ **Data is available from government, or because of government actions.** ✕

SUPERVISOR COMMENT (AN HOUR AGO)
why it is available?

YOUR COMMENT

POST

For a specific comment, you can take the following actions:

- **Respond to comments.** Note that the comment box has a 750-character limit. If you have long comments, break them into several comments. Do note there is no way to edit or delete a comment.
- **Modify your response if necessary.** If you change the answer to a single-choice question, the corresponding supporting questions may also change. Don't forget to update your answers to those supporting questions as well.

Please note it is critical that you only edit the answers in the questions with comments to be addressed, and do not update any of the remaining responses as those have been reviewed.

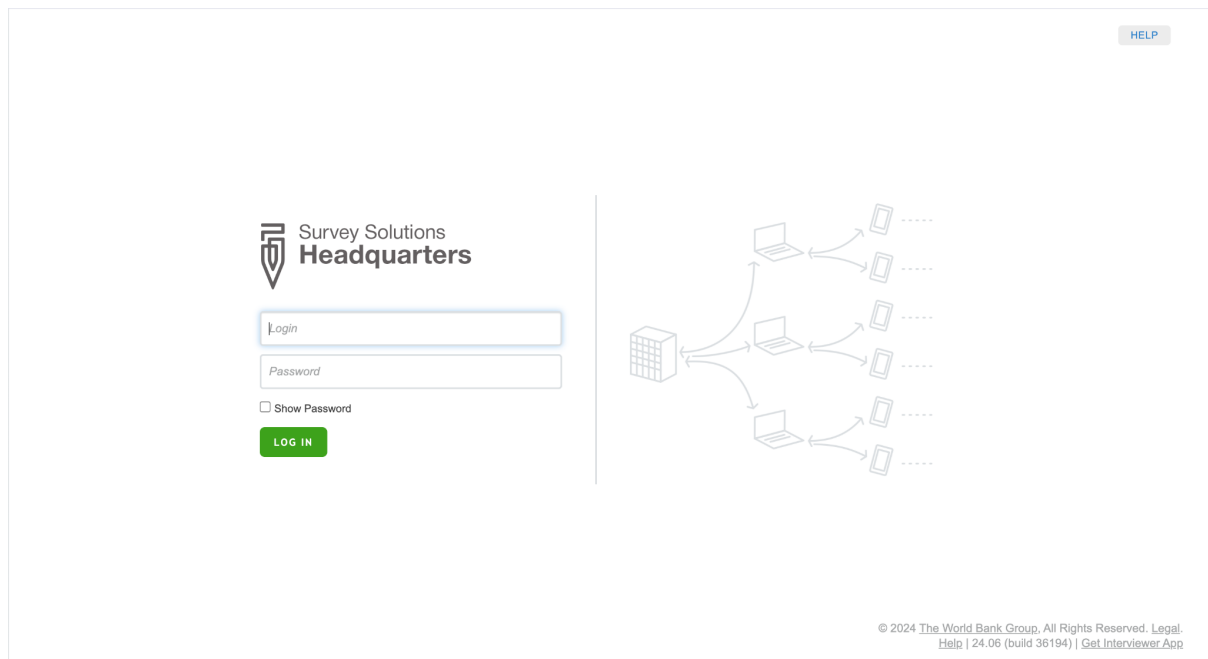
2.4.4 Re-Submit the Survey

After resolving all comments, click on the “Complete” section in the left navigation panel to jump to the “Complete” section, then submit the survey.

Please double-check the list of comments on the “Cover” page to ensure you’ve addressed all of them before submitting the survey for another review.

3. User Guide: Coordinator

3.1 Access the Tool



You should have received your credentials from the GDB team. Enter the username and password to log into the Tool.

When you access the Tool for the first time, you will be asked to reset the password. **Please remember to use the exact same password to reset it** so it's possible for the GDB team to help you look up the password whenever you forgot or lost it.

In case you forgot or lost the credentials, please reach out to the GDB team.

Guidance on how to conduct the reviewing is available in the [GDB Reviewers Manual](#).

3.2 Review Surveys

Your task is to review every survey with a “Completed” status and either approve or reject it. This will allow the survey to be ready for headquarter review or to be returned to the researcher for clarification.

You can click on the “Interview” tab on the top of the interface. This will redirect you to the “Interview” interface, where you can search, filter and then review a specific interview(survey). **The list is not automatically refreshed, so you are advised to refresh the page regularly to check whether there are new surveys pending for your action.**

Please note that an interview is an instance of a specific survey that is associated with a specific researcher for a specific country. And for the GDB survey, it is divided into a set of action areas. Each action area is a survey in the data collection tool. We will use interview and survey interchangeably below.

3.2.1 Search and Filter Surveys for Review

The “Interview” tab mixes surveys with different statuses, belonging to different action areas, and associated with different researchers and countries. Note that the list only includes surveys that are already opened, i.e. in or beyond ‘Interviewer Assigned’ status. You can use either the search or filter to get a list of surveys satisfying specific criteria, e.g. a list of surveys assigned to a specific researcher.

You should prioritise your review tasks in the order of the action areas listed in the [review manual](#) (section: 2. Research and review process) . You can use the search or filters to locate prioritised surveys for review.

>>> 🎥 You can also [watch this video](#) which demonstrates how to use the search and filter functions.

3.2.1.1 Search Surveys

The screenshot shows the 'Interviews' tab in the Global Data Barometer interface. On the left, there are filters for Questionnaire, Questionnaire version, Status, Responsible, Assignment, and Interview Mode. The main area displays a table of interviews with columns: Interview Key, Identifying Questions, Responsible, Updated On, Errors Count, Not Answered, Interview Mode, Status, Received by Tablet, and Assignment. A search box at the top right contains the text 'costa'. The table shows three entries, all filtered from 9 total entries. The first entry is highlighted with a blue box.

Interview Key	Identifying Questions	Responsible	Updated On	Errors Count	Not Answered	Interview Mode	Status	Received by Tablet	Assignment
14-05-15-59	regional hub: regional hub 1, country: Costa Rica, Indicator name: Beneficial Ownership	test_int	Jul 31, 2024 11:22	0	21	CAPI	Interviewer assigned	No	4
97-97-75-98	regional hub: regional hub 1, country: Costa Rica, Indicator name: Beneficial Ownership	test_int	Jul 29, 2024 21:40	0	35	CAPI	Completed	No	4
29-44-39-78	regional hub: regional hub 1, country: Costa Rica, Indicator name: Beneficial Ownership	test_int	Jul 24, 2024 00:43	0	41	CAPI	Interviewer assigned	No	4

You can use the search box at the top right corner (the purple area in the above image) of the interface to search and filter the list of surveys. Please note that the search box applies text search to all columns in the table. You can achieve either exact match search filtering or partial match search filtering.

For example, you can enter the name of a country, e.g., "Costa Rica," to obtain surveys associated with it. Or, you can enter the first few letters, e.g. “Co” to match multiple possible countries but also match with other contents in other columns.

Please note that the information in the column ‘Identifying questions’ should include the following information: regional hub, country, cluster and action area. They will be pre-populated by the GDB team when a survey is assigned to a researcher.

3.2.1.2 Filter Surveys

You can use the filters on the left pane to fetch a list of surveys that meet certain criteria. Here are suggested ways to construct and apply filters and do remember that you can use multiple filters in combination.

1. **Get a list of surveys with a specific Status:** You can use the “Status” filter to do this by selecting a specific status, such as “Completed”. This will return a list of all “Completed” surveys. Please note that only “Completed” or “Rejected by Headquarters” statuses are relevant to your review task.
2. **Get a list of surveys belonging to a specific Action Area:** You can use the “Questionnaire” filter by selecting a specific action area. For instance, choose “Action Area: Beneficial Ownership” to get all surveys in this action area, regardless of their statuses. You can ignore the “Questionnaire Version” filter since all GDB surveys on the data collection tool have only one version by default.
3. **Get a list of surveys associated with a specific researcher:** You can use the “Responsible” filter to do this by selecting the specific researcher’s account name. **Please note that a researcher’s account name contains the associated country name, so you can easily use the country name to search for a researcher. For instance, XXX_France, is a researcher’s account for France.**
4. **Get a list of surveys associated with a specific country:** You can use the “Question Selector” feature to achieve this, which is located on the left pane under “Filters by questions.” You may notice that the “Question Selector” button is initially grey and cannot be interacted with. However, after you construct and apply the “Questionnaire” filter, the button becomes clickable. Once you click it, a list of checkboxes will appear, each representing a question from the GDB Survey. Tick the “Select a country” box and click the ‘OK’ button. Now you will see “country equals” under the “Question Selector.” Click on it to select the specific country and filter the list of surveys to only those associated with that country.

You can bookmark specific filter combinations for easier viewing of the specific survey list. For instance:

- To view only ‘completed’ surveys:

<https://datacollection.globaldatabarometer.org/gdb2/Interviews?status=COMPLETED>.

3.2.2 Open up and Navigate a Survey

After you locate a specific survey you want to review, you can click on the survey and click the pop-up menu item “Open” to open up the specific survey.

Filters

Questionnaire

All questionnaires

Questionnaire version

All versions

Status

All statuses

Responsible

Any responsible

Assignment

All assignments

Interview Mode

All interview modes

Filters by questions

QUESTIONS SELECTOR

DYNAMIC FILTERS

Interviews (9)

Search...

Showing 1 to 9 of 9 entries

INTERVIEW KEY	Identifying Questions	RESPONSIBLE	UPDATED ON	ERRORS COUNT	NOT ANSWERED	INTERVIEW MODE	STATUS	RECEIVED BY TABLET	ASSIGNMENT
☐ 14-05-15-59	regional hub: regional hub 1, country: Costa Rica, Indicator name: Beneficial Ownership	☐ test_int	Jul 31, 2024 11:22	0	21	CAPI	Interviewer assigned	No	4
☐ 97-97-75-98	regional hub: regional hub 1, country: Costa Rica, Indicator name: Beneficial Ownership	☐ test_int	Jul 29, 2024 21:40	0	35	CAPI	Completed	No	4
☐ 29-44-39-78	regional hub: regional hub 1, country: Costa Rica, Indicator name: Beneficial Ownership	☐ test_int	Jul 24, 2024 00:43	0	41	CAPI	Interviewer assigned	No	4
☐ 85-96-05-39	regional hub: regional hub 1, country: Uruguay, Indicator name: Public Procurement, Indicator type: Public Procurement, Mo Procurement	☐ test_int	Jul 24, 2024 00:06	0	0	CAPI	Rejected by Supervisor	No	2
☐ 43-02-98-32		☐ test_int	Jul 23, 2024 21:40	0	48	CAPI	Interviewer assigned	No	3
☐ 03-82-08-45		☐ test_int	Jul 23, 2024 21:39	0	48	CAPI	Interviewer assigned	No	3
☐ 05-26-19-39	regional hub: regional hub 1, country: Uruguay	☐ test_int	Jul 18, 2024 15:11	0	45	CAPI	Interviewer assigned	No	2
☐ 13-93-48-95	regional hub: regional hub 1, country: Uruguay	☐ test_int	Jun 25, 2024 20:52	0	49	CAPI	Completed	No	2
☐ 63-99-06-60	regional hub: regional hub 1, country: Uruguay	☐ test_int	Jun 17, 2024 22:58	0	26	CAPI	Interviewer assigned	No	1

You then will see the content of the survey including all questions and answers from the specific researcher, but also any comments left by the researcher which are displayed in pink. Please note that each survey covers one action area, and it is composed of one or a few indicators. Each indicator is composed of two sections: Existence and Elements.

3.2.2.1 Use the Navigation Pane

Filter Questions

☐ With comments (0)

☐ Flagged (0)

☐ No flag (13)

☐ Invalid (0)

☐ Valid (18)

☐ Answered (13)

☐ Not answered (0)

☐ For supervisor (0)

☐ For interviewer (10)

☐ Critical questions (6)

☐ Critical rules (0)

Reset all filters

Progress: 10/10

100%

Action Area: Beneficial Ownership

— Governance: Beneficial ownership of companies

Existence

Elements

+ Availability: Beneficial ownership of companies

GOVERNANCE: BENEFICIAL OWNERSHIP OF COMPANIES /

Existence

Existence Question 1: Are there laws, policies, or regulations requiring collection of this information in any form?

No

They are being drafted or are not yet implemented.

They exist and are operational.

Please provide brief details.

Please provide brief details.

If the responses exist only in draft form, please provide the date of any relevant drafts.

Existence Question 2: Are there laws, policies, or regulations requiring publication of this information in any form?

No

They are being drafted, or are not yet implemented.

They exist and are operational.

Please provide brief details.

On the left side of the interface, you can find the navigation pane with the list of the sections(indicators) and subsections(sections of each indicator). Click on the “+” sign next to the left of a section or subsection to expand the element to navigate directly to an item in that section or subsection.

3.2.2.2 Use Filters to Navigate the Survey

You can further navigate through the survey by using the filters on the leftmost pane. The filters that are available are: With comments, Flagged, No flag, Invalid, Valid, Answered, Not answered, For supervisor (team leader), For interviewer (researcher). You can select multiple filters.

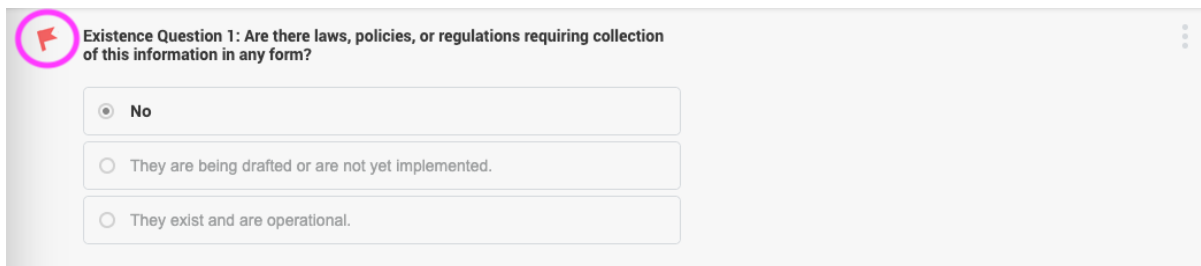
If you are reviewing a newly submitted survey, no filters are needed for your review task.

However, if you are reviewing a re-submitted survey which was rejected by the Headquarter, i.e. the reviewers or the GDB team. Then you may find following filters are useful for you to quickly navigate the survey:

- The With comments filter:
- The flagged filters

They display those questions with comments or flags, respectively. The number in the parentheses next to each filter indicates how many questions in the survey for which that filter applies. Clicking on a filter will show a list of the filtered questions on the right for which the filter is true. For example, if you selected the “The with Comments” filter, then you will see all the questions with comments. Clicking on the question in the right pane will take you to the question of interest. To reset all the filters and see all the questions in the survey, click on the View all (reset all filters) link below all the filters.

3.3 Flag Questions

A screenshot of a survey question interface. At the top left, there is a purple circle containing a white flag icon. To its right, the text reads "Existence Question 1: Are there laws, policies, or regulations requiring collection of this information in any form?". Below this text are three radio button options: "No", "They are being drafted or are not yet implemented.", and "They exist and are operational.".

When reviewing a survey, you might find a question that needs further attention or comparison before taking any actions, such as leaving a comment. For example, this is helpful when comparing the consistency of an answer in one section with an answer in a later section. In such cases, you can use the Flag feature to mark a question, making it easy to revisit later.

To add a flag, go to the question where you want to leave a flag and move your cursor to the top left-hand side of the screen. Click on the flag icon (see the purple circle in the above image), which is grey initially and will turn red when clicked. Once a flag is added, you can always click on it again to remove the flag. You can later use the Flagged filter to find all flagged questions.

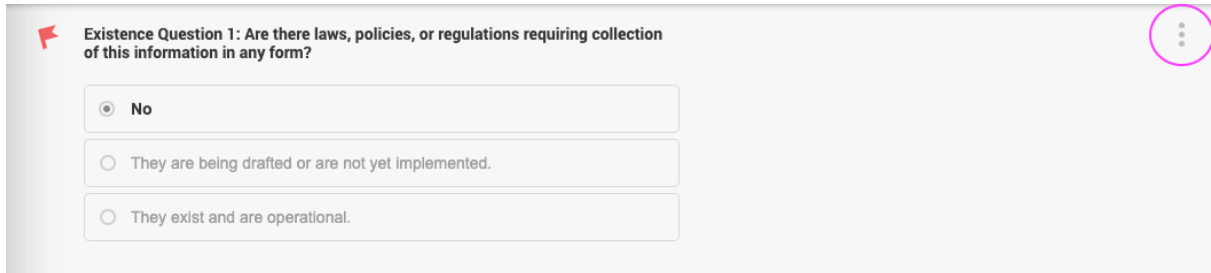
Please note that the flags are only visible to you, the reviewers and the GDB team. It is not visible to the researcher, so do not consider using the flag to communicate with the researcher.

3.4 Comments

>>> 🗣️ You can also [watch this video](#) which demonstrates how to use the comments.

3.4.1 Add Comments

If you identify an answer that requires further classification or correction, you have to leave a comment on the specific question for the researcher.



Existence Question 1: Are there laws, policies, or regulations requiring collection of this information in any form?

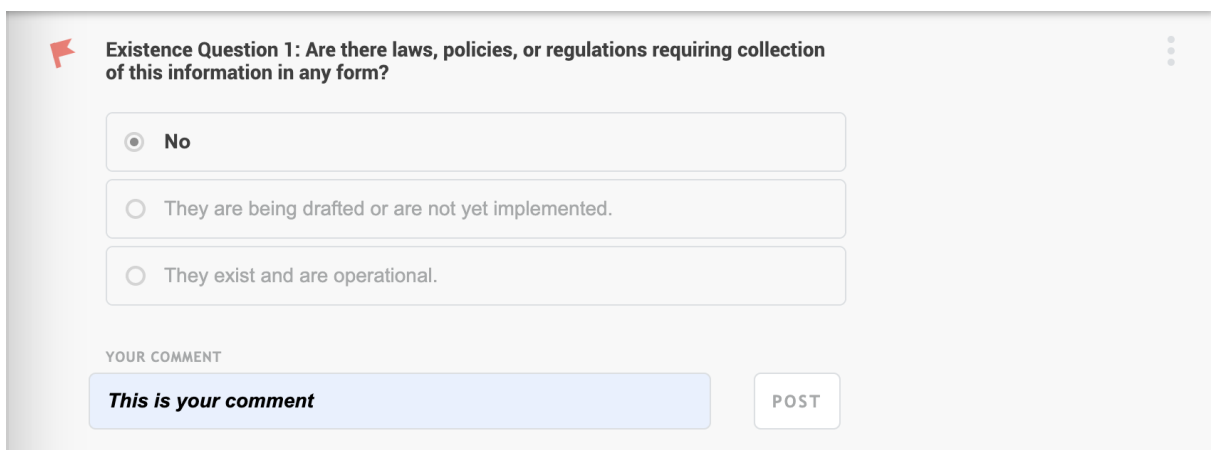
☒ No

☐ They are being drafted or are not yet implemented.

☐ They exist and are operational.

A purple circle highlights a grey 3-dots menu icon in the top right corner of the question card.

To leave a comment, click on the grey 3-dots (see the purple circle in the image above) on the top right corner of the question and then select “Add comment.”



Existence Question 1: Are there laws, policies, or regulations requiring collection of this information in any form?

☒ No

☐ They are being drafted or are not yet implemented.

☐ They exist and are operational.

YOUR COMMENT

This is your comment

POST

A box at the bottom of the question will appear (see the above image) where you can type a comment for the researcher. After typing your comment, press the "Enter" key on the keyboard or click the "Post" button to add the comment. You can post multiple comments on any question, **but keep in mind that there is no way to edit or delete comments.**

Comments left by you as a coordinator can only be resolved by yourself, the reviewers, or the GDB team. The researchers will not be able to resolve comments made by coordinators or reviewers.

3.4.2 View and Resolve Comments

Is this data available online in any form?

☐ Data is not available online.

☐ Data is available, but not as a result of government action

☒ **Data is available from government, or because of government actions.** ✕

SUPERVISOR COMMENT (AN HOUR AGO)
why it is available?

YOUR COMMENT

POST

For a specific comment, you can take the following actions:

- **Respond to comments:** Note that the comment box has a 750-character limit. If you have long comments, break them into several comments.
- **Mark a comment resolved:** You can only resolve a comment thread initiated by you. This will close the comment thread and it will no longer be displayed on the cover page when a researcher opens the survey. The resolved comments will still exist and can be unexpanded to view the comments.

3.5 Approve or Reject a Survey

The screenshot shows the survey review interface. At the top, there is a navigation bar with 'Default Workspace', 'Reports', 'Interviews', 'Team and Roles', and 'Survey Setup'. The user is logged in as 'test_sup'. Below the navigation bar, the survey details are displayed: 'Interview Key: 64-61-47-92(Assignment #5)', 'Duration: 11 minutes', 'Status: Completed', 'Updated: 13 hours ago', 'Responsible: test_int', 'Supervisor: test_sup', and 'Calendar Event:'. The survey is titled '[ver.2] Action Area - Beneficial Ownership' and is in 'Mode: CAPI'. On the right side, there are two buttons: 'APPROVE' (green) and 'REJECT' (red). Two pink arrows point to these buttons. On the left side, there is a 'Filter Questions' panel with various filters like 'With comments (1)', 'Flagged (1)', 'No flag (12)', 'Invalid (0)', 'Valid (18)', 'Answered (13)', 'Not answered (0)', 'For supervisor (0)', 'For interviewer (10)', 'Critical questions (6)', and 'Critical rules (0)'. The main content area shows the survey progress (10/10, 100%) and the 'Existence summary' section. The summary includes 'Existence Question 4: Please summarize your answers to the preceding existence sub-questions, including the extent of existence.' and a text input field with the value 'there is no evidence at all'. Below this, there is a section for 'Please provide the URL(s) for the evidence that supports the summary provided.' with a text input field containing 'na'. At the bottom, there is a green box with the text 'GOVERNANCE: BENEFICIAL OWNERSHIP OF COMPANIES'.

After reviewing a survey, you have the choice to (1) approve the survey if there are no further clarifications needed from the researcher or (2) reject it if there are comments left for the researcher to resolve. To approve, click on the green Approve button; to reject, the red Reject button.

The screenshot shows the same survey review interface as before, but with a 'Reject interview' pop-up dialog box open. The dialog box has a title bar 'Reject interview' and a close button (X). It contains two radio buttons: 'Reject to original responsible' (selected) and 'Reject and choose new responsible'. Below these, there is a 'Comment:' label and a text input field. At the bottom of the dialog box, there are two buttons: 'REJECT' (blue) and 'CANCEL' (blue). The background of the survey review interface is dimmed.

Whichever button is selected, a pop up confirmation screen will appear with the opportunity to provide a comment on the survey as a whole (note this comment will be visible to the researcher and the headquarter reviewers). At this confirmation screen, click on the blue OK to confirm your approval or rejection. Click on the CANCEL button

to go back to the survey detail screen. **Please Kindly disregard the two options displayed on the “Reject interview” interface.**

Make sure you are certain of your decision before proceeding. There is no way to un-approve or un-reject a questionnaire unless it is rejected by the reviewers or the GDB team. Any surveys you approved will be immediately forwarded to the reviewers, and any surveys you rejected will be immediately returned to the researchers.

Notification emails will be automatically sent to the researchers regarding the “Reject” decisions, and to the reviewers regarding the “approve” decision if the survey was previously rejected by the reviewers.

3.6 Notification Emails

We understand that it's not possible for you to monitor the status of surveys around the clock and take action in real time. To address this, we have implemented a technical system that conducts status checks and sends reminder notification emails every two hours, commencing at 0:00 am (UTC-4) each day.

The system is designed to send you a reminder email under specific conditions:

1. a survey approved by you is rejected by the reviewers or GDB team, or
2. a rejected survey is re-submitted for review with modified response and comments from the researcher
3. a rejected survey is re-submitted for review with modified responses to questions without any comments from the reviewers or coordinators

Please note that the system sends emails only when the above changes remain unaddressed at the latest status check. For example, if a survey you approved was rejected by a reviewer at 1:20 pm (UTC-4), and you have already taken action to reject or approve it by 1:58 pm (UTC-4), the system will not send you an email about the rejection at the 2:00 pm (UTC-4) status check. However, if you have not taken any action by 2:00 pm (UTC-4) or if you take action after 2:00 pm (UTC-4), you will receive an email about the rejection.

To ensure you receive these emails, please add 'help@globaldatabarometer.org' to your safe senders list to prevent them from being filtered into your spam folder. All emails sent to you will have a subject line starting with "[GDB]".

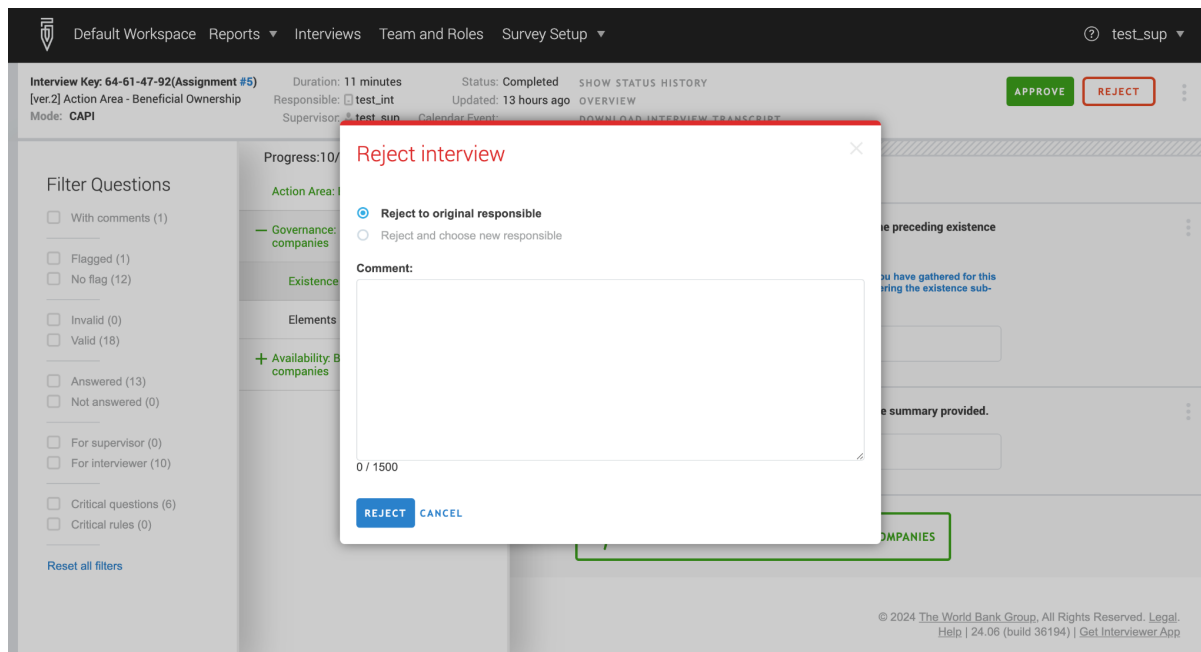
3.7 Surveys rejected by Headquarter

After receiving a notification email about a newly rejected survey from the reviewers or GDB team, you should promptly review the survey and add any necessary comments.

If you disagree with some of the comments or find them contradictory to general criteria being used, you can re-approve the survey and add comments to justify your decision, so

the survey can be directly returned to the reviewer. If you and the reviewer can not reach agreement, please notify the GDB team for resolution.

If you agree with the rejection decision, add your comments to specific questions if needed, and mark the survey as “Reject” so it can be returned to the researcher.



If you find it necessary, you may leave a comment on the “Reject” screen to help the researcher understand the review stage at which their survey was rejected and the high-level reasons. For instance, “the survey went through an in-depth review by an expert reviewer and is now returned to you because (1)... (2)... (3)...”. Otherwise, the researcher will be able to directly read the rejection reasons from the reviewer.

3.8 Check Data Collection Progress

Click on the “Reports” on the top of the interface. This will redirect you to the “Reports” interface, where you can find several high-level reports to manage the progress of data collection.

Below, we introduce three reports you may use during data collection for GDB.

3.8.1 Report: Surveys and Statuses

Default Workspace **Reports** ▾ Interviews Team and Roles Survey Setup ▾ test_sup ▾

Filters

Interviewer (team)

All interviewers

Surveys and Statuses

The Surveys and Statuses report shows number of interviews in each status for surveys in which this supervisor is involved

QUESTIONNAIRE TITLE ▾	SUPERVISOR ASSIGNED ▾	INTERVIEWER ASSIGNED ▾	COMPLETED ▾	REJECTED BY SUPERVISOR ▾	APPROVED BY SUPERVISOR ▾	REJECTED BY HQ ▾	APPROVED BY HQ ▾	TOTAL ▾
	0	6	2	1	0	0	0	9
Availability-Public procurement data (Test)	0	4	1	1	0	0	0	6
Action Area Beneficial Ownership	0	2	1	0	0	0	0	3

Download report as [XLSX](#), [CSV](#) or [TAB](#)

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This report shows the number of interviews in each status per action area. Please note that an interview is an instance of a survey. This means it is a survey to be completed or already completed by a specific researcher for a specific country.

Do note that the report only lists action areas (the first column of the table) when there is at least one researcher who has opened(started the action area interview(survey)). If you can not see an action area listed in the table, then it means there is no researcher that has started it yet. By default, the list is empty until any action area has an interview(survey) gets opened(started).

You can use this report to get an overview of the progress per action area.

As shown in the screenshot above, an interview can go through seven different statuses during the data collection process. Please note that an interview can only have one specific status at a time.

- **Supervisor Assigned:** This stays 0 throughout the entire GDB data collection process.
- **Interviewer Assigned:** This represents the number of interviews currently being opened and not yet completed(submitted) by the country-specific researchers
- **Completed:** This represents the number of interviews currently being completed and submitted by the country-specific researchers
- **Rejected by Supervisor:** This represents the number of interviews currently being rejected by you as the coordinator
- **Approved by Supervisor:** This represents the number of interviews currently being approved by you as the coordinator
- **Rejected by HeadQuarter:** This represents the number of interviews currently being rejected by the reviewers or the GDB team

- **Approved by HeadQuarter:** This represents the number of interviews currently being approved by the reviewers or the GDB team

Please do note that the number in 'Total' may not match with the total number of researchers you are supervising if any of them have not yet started the specific action area survey.

3.8.2 Report: Team members and Statuses

Team Members and Statuses

The Teams and Statuses report shows the number of interviews in each status by interviewer

All questionnaires, all versions

TEAM MEMBER ▲	SUPERVISOR ASSIGNED ▼	INTERVIEWER ASSIGNED ▼	COMPLETED ▼	REJECTED BY SUPERVISOR ▼	APPROVED BY SUPERVISOR ▼	REJECTED BY HQ ▼	APPROVED BY HQ ▼	TOTAL ▼
All interviewers	0	6	2	1	0	0	0	9
test_int	0	6	2	1	0	0	0	9

Download report as [XLSX](#), [CSV](#) or [TAB](#)

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This report shows the number of interviews in each status per interviewer (researcher). You can use it to get an overview of each researcher's progress.

Note the 'Total' of each row should be equal to the actual total number of surveys, which is 16 (action areas), minus the number of surveys that have not yet been opened (started) by the researcher. Therefore, if you only see the 'Total' shows 9, then it means the researcher has 7 action area surveys not yet opened(started)..

3.8.3 Report: Status Duration

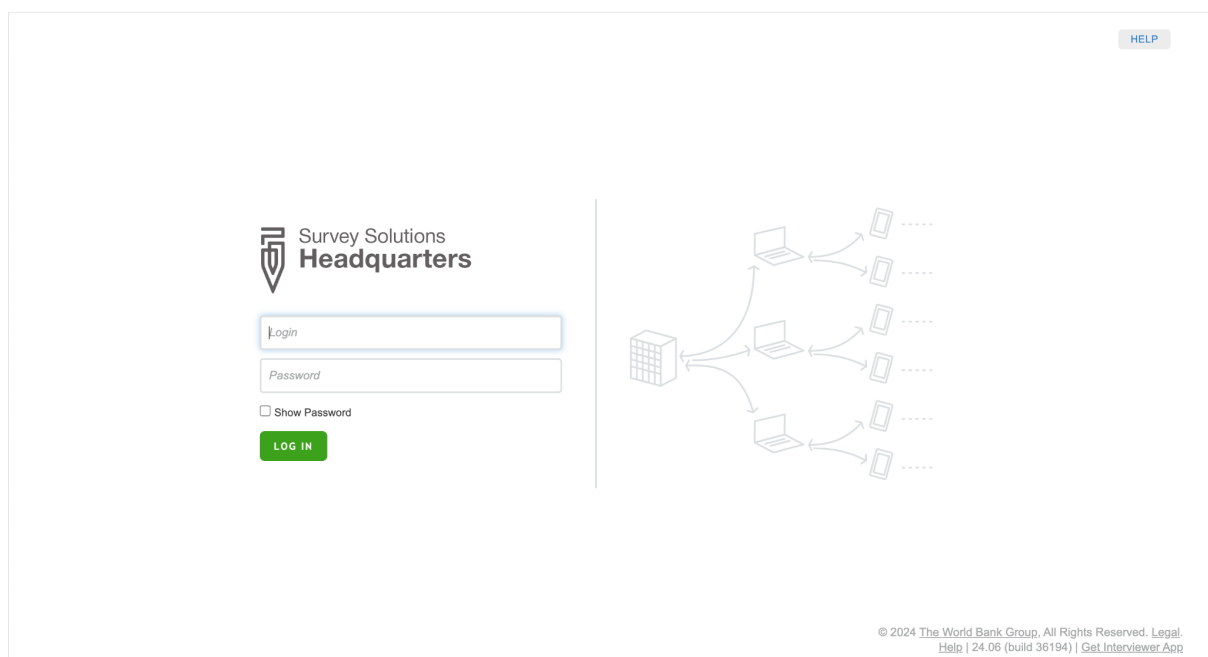
[illegible]

This report shows the number of days that interviews have stayed in their current status. Remember, an interview is an instance of a survey associated with a specific researcher.

You can use the filter on the left to select a specific survey, and then identify if any interview has remained in a status for an abnormally long time.

4. User Guide: Reviewer

4.1 Access the Tool



You should have received your credentials from the GDB team. Enter the username and password to log into the Tool.

When you access the Tool for the first time, you will be asked to reset the password. **Please remember to use the exact same password to reset it** so it's possible for the GDB team to help you look up the password whenever you forgot or lost it.

In case you forgot or lost the credentials, please reach out to the GDB team.

Guidance on how to conduct the reviewing is available in the [GDB Reviewers Manual](#).

4.2 Review Surveys

Your task is to review every survey with an "Approved by Supervisor" status. You need to either approve or reject the survey so it can be forwarded to the GDB team for a final data quality check, or returned to the coordinator, who will then reject and return it to the researcher.

You can click on the "Interview" tab on the top of the interface. This will redirect you to the "Interview" interface, where you can search, filter and then review a specific interview (survey). **The list is not automatically refreshed, so you are advised to refresh the page regularly to check whether there are new surveys pending for your action.**

Please note that an interview is an instance of a specific survey that is associated with a specific researcher for a specific country. And for the GDB survey, it is divided into a set of action areas. Each action area is a survey on the data collection tool. We will use interview and survey interchangeably below.

4.2.1 Search and Filter Surveys for Review

The entire list of surveys mixes surveys with different statuses, belonging to different action areas, and associated with different researchers and countries. Note that the list only includes surveys that are already opened, i.e. in or beyond 'Interviewer Assigned' status. You can use either the search or filter to get a specific survey or a list of surveys satisfying specific criteria.

You should prioritise your review tasks in the order of the action areas listed in the [review manual](#) (section: 2. Research and review process) . You can use the search or filters to locate prioritised surveys for review.

>>>  You can also [watch this video](#) which demonstrates how to use the search and filter functions.

4.2.1.1 Search Surveys

The screenshot shows the 'Interviews' tab in the Global Data Barometer 2nd Edition Survey Manual. The interface includes a left sidebar with filters for Questionnaire, Status, Responsible, Assignment, and Interview Mode. The main area displays a table of interviews with columns for Interview Key, Identifying Questions, Responsible, Updated On, Errors Count, Not Answered, Interview Mode, Status, Received by Tablet, and Assignment. A search box at the top right is highlighted with a purple border and contains the text 'costa'. The table shows three entries filtered from 9 total entries, all related to 'Costa Rica'.

INTERVIEW KEY	Identifying Questions	RESPONSIBLE	UPDATED ON	ERRORS COUNT	NOT ANSWERED	INTERVIEW MODE	STATUS	RECEIVED BY TABLET	ASSIGNMENT
14-05-15-59	regional hub: regional hub 1, country: Costa Rica , Indicator name: Beneficial Ownership	test_int	Jul 31, 2024 11:22	0	21	CAPI	Interviewer assigned	No	4
97-97-75-98	regional hub: regional hub 1, country: Costa Rica , Indicator name: Beneficial Ownership	test_int	Jul 29, 2024 21:40	0	35	CAPI	Completed	No	4
29-44-39-78	regional hub: regional hub 1, country: Costa Rica , Indicator name: Beneficial Ownership	test_int	Jul 24, 2024 00:43	0	41	CAPI	Interviewer assigned	No	4

Showing 1 to 3 of 3 entries (filtered from 9 total entries)

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You can use the search box at the top right corner (the purple area in the above image) of the interface to search and filter the list of surveys. Please note that the search box only applies text search to the “Identifying Questions” column. You can achieve either exact match search filtering or partial match search filtering. For example, you can enter the name of a country, e.g., "Costa Rica," to obtain surveys associated with it. Or, you can enter the first few letters to match multiple possible countries.

4.2.1.2 Filter Surveys

You can use the filters on the left pane to fetch a list of surveys that meet certain criteria. Here are suggested ways to construct and apply filters and do remember that you can use multiple filters in combination.

- Get a list of surveys with a specific Status:** You can use the “Status” filter to do this by selecting a specific status, such as “Approved by Supervisors”. This will return a list of all surveys that have been approved by the coordinators. **Please note that only “Approved by Supervisors” status is relevant to your review task.**
- Get a list of surveys belonging to a specific Action Area:** You can use the “Questionnaire” filter by selecting a specific action area. For instance, choose “Action Area: Beneficial Ownership” to get all surveys in this action area, regardless of their statuses. You can ignore the “Questionnaire Version” filter since all GDB surveys on the data collection tool have only one version by default.
- Get a list of surveys associated with a specific researcher:** You can use the “Responsible” filter to do this by selecting the specific researcher’s account name. **Please note that a researcher’s account name contains the associated country name, so you can easily use the country name to search for a researcher. For instance, XXX_France, is a researcher’s account for France.**
- Get a list of surveys associated with a specific country:** You can use the "Question Selector" feature to achieve this, which is located on the left pane under "Filters by questions." You may notice that the “Question Selector” button is initially grey and cannot be interacted with. However, after you construct and

apply the "Questionnaire" filter, the button becomes clickable. Once you click it, a list of checkboxes will appear, each representing a question from the GDB Survey. Tick the "Select a country" box and click the 'OK' button. Now you will see "country equals" under the "Question Selector." Click on it to select the specific country and filter the list of surveys to only those associated with that country.

You can bookmark specific filter combinations for easier viewing of the specific survey list. For instance:

- To view only 'Approved by Supervisor' surveys:

<https://datacollection.globaldatabarometer.org/gdb2/Interviews?status=APPROVEDBYSUPERVISOR>

4.2.2 Open up and Navigate a Survey

After you locate a specific survey you want to review, you can click on the survey and click the pop-up menu item "Open" to open up the specific survey.

Filters

Questionnaire

All questionnaires

Questionnaire version

All versions

Status

All statuses

Responsible

Any responsible

Assignment

All assignments

Interview Mode

All interview modes

Filters by questions

QUESTIONS SELECTOR

DYNAMIC FILTER

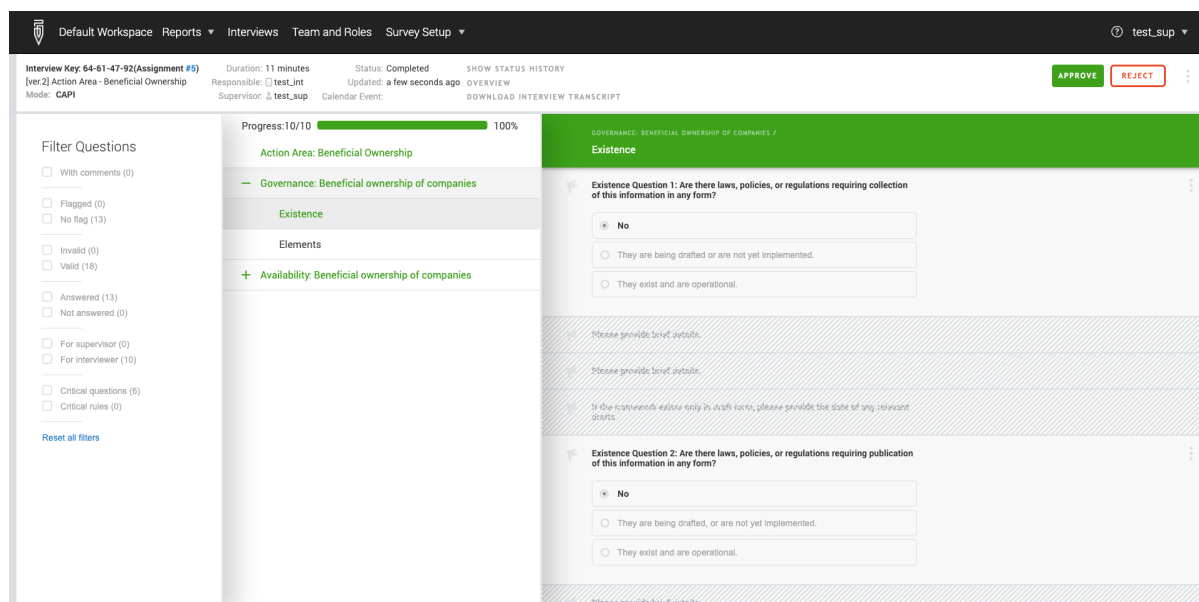
Interviews (9)

Identifying Questions

INTERVIEW KEY	RESPONSIBLE	UPDATED ON	ERRORS COUNT	NOT ANSWERED	INTERVIEW MODE	STATUS	RECEIVED BY TABLET	ASSIGNMENT
14-05-15-59	regional hub: regional hub 1, country: Costa Rica, Indicator name: Beneficial Ownership	test_int	Jul 31, 2024 11:22	0	21	CAPI	Interviewer assigned	No 4
97-97-75-98	regional hub: regional hub 1, country: Costa Rica, Indicator name: Beneficial Ownership	test_int	Jul 29, 2024 21:40	0	35	CAPI	Completed	No 4
29-44-39-78	regional hub: regional hub 1, country: Costa Rica, Indicator name: Beneficial Ownership		Jul 24, 2024 00:43	0	41	CAPI	Interviewer assigned	No 4
85-96-05-39	regional hub: regional hub 1, country: Uruguay, Indicator name: Public Procurement, Indicator type: Public Procurement, Mo Procurement		Jul 24, 2024 00:06	0	0	CAPI	Rejected by Supervisor	No 2
43-02-98-32			Jul 23, 2024 21:40	0	48	CAPI	Interviewer assigned	No 3
03-82-08-45			Jul 23, 2024 21:39	0	48	CAPI	Interviewer assigned	No 3
05-26-19-39	regional hub: regional hub 1, country: Uruguay	test_int	Jul 18, 2024 13:11	0	45	CAPI	Interviewer assigned	No 2
13-93-48-95	regional hub: regional hub 1, country: Uruguay	test_int	Jun 25, 2024 20:52	0	49	CAPI	Completed	No 2
63-99-06-60	regional hub: regional hub 1, country: Uruguay	test_int	Jun 17, 2024 22:58	0	26	CAPI	Interviewer assigned	No 1

You then will see the content of the survey including all questions and answers from the specific researcher, but also any comments left by the researcher or coordinator. Please note that each survey covers one action area, and it is composed of one or a few indicators. Each indicator is composed of two sections: Existence and Elements.

4.2.2.1 Use the Navigation Panel



On the left side of the interface, you can find the navigation pane with the list of the sections(indicators) and subsections(sections of each indicator). Click on the “+” sign next to the left of a section or subsection to expand the element to navigate directly to an item in that section or subsection.

4.2.2.2 Use Filters to Navigate the Survey

You can further navigate through the survey by using the filters on the leftmost pane. The filters that are available are: With comments, Flagged, No flag, Invalid, Valid, Answered, Not answered, For supervisor (team leader), For interviewer (researcher). You can select multiple filters.

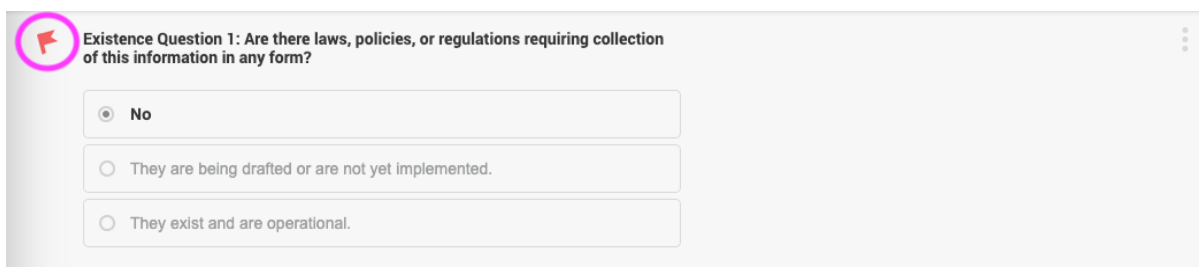
If you are reviewing a newly submitted survey, no filters are needed for your review task.

However, if you are reviewing a re-submitted survey which was rejected by the Headquarter, i.e. the reviewers or the GDB team. Then you may find following filters are useful for you to quickly navigate the survey:

- The With comments filter
- The flagged filters

They display those questions with comments or flags, respectively. And the number in the parentheses next to each filter indicates how many questions in the survey for which that filter applies. Clicking on a filter will show a list of the filtered questions on the right for which the filter is true. For example, if you selected the “The with Comments” filter, then you will see all the questions with comments. Clicking on the question in the right pane will take you to the question of interest. To reset all the filters and see all the questions in the survey, click on the View all (reset all filters) link below all the filters.

4.3 Flag Questions



The screenshot shows a survey question titled "Existence Question 1: Are there laws, policies, or regulations requiring collection of this information in any form?". To the left of the question is a red flag icon inside a purple circle. Below the question are three radio button options: "No", "They are being drafted or are not yet implemented.", and "They exist and are operational.".

When reviewing a survey, you might find a question that needs further attention or comparison before taking any actions, such as leaving a comment. For example, this is helpful when comparing the consistency of an answer in one section with an answer in a later section. In such cases, you can use the Flag feature to mark a question, making it easy to revisit later.

To add a flag, go to the question where you want to leave a flag and move your cursor to the top left-hand side of the screen. Click on the flag icon (see the purple circle in the above image), which is grey initially and will turn red when clicked. Once a flag is added, you can always click on it again to remove the flag. You can later use the Flagged filter to find all flagged questions.

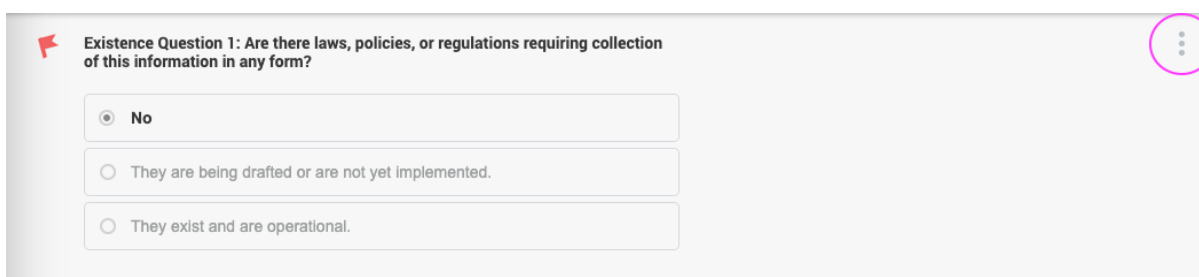
Please note that the flags are only visible to you and the GDB team. It is not visible to the researcher or coordinator, so do not consider using the flag to communicate with them.

4.4 Comments

>>> 🗣️ You can also [watch this video](#) which demonstrates how to use the comments.

4.4.1 Add Comments

If you identify an answer that requires further classification or correction, you can leave a comment on the specific question for the researcher.



The screenshot shows the same survey question as above. In the top right corner, there is a grey 3-dots menu icon inside a purple circle. The question and its three radio button options are visible below.

To leave a comment, click on the grey 3-dots (see the purple circle in the image above) on the top right corner of the question and then select “Add comment.”

Existence Question 1: Are there laws, policies, or regulations requiring collection of this information in any form?

☒ No

☐ They are being drafted or are not yet implemented.

☐ They exist and are operational.

YOUR COMMENT

This is your comment

POST

A box at the bottom of the question will appear (see the above image) where you can type a comment for the researcher. After typing your comment, press the "Enter" key on the keyboard or click the "Post" button to add the comment. You can post multiple comments on any question, **but keep in mind that there is no way to edit or delete comments.**

Comments left by you as a reviewer can only be resolved by yourself or the GDB team. The researchers and coordinators will not be able to resolve comments made by reviewers.

4.4.2 View and Resolve Comments

Is this data available online in any form?

☐ Data is not available online.

☐ Data is available, but not as a result of government action

☒ **Data is available from government, or because of government actions.** ✕

SUPERVISOR COMMENT (AN HOUR AGO)
why it is available?

YOUR COMMENT

Enter your comment

POST

For a specific comment, you can take the following actions:

- **Respond to comments:** Note that the comment box has a 750-character limit. If you have long comments, break them into several comments.

- **Mark a comment resolved:** You can only resolve a comment thread initiated by you. This will close the comment thread and it will no longer be displayed on the cover page when a researcher opens the survey. The resolved comments will still exist and can be unexpanded to view the comments.

4.4 Approve or Reject a Survey



Default Workspace
Reports
Interviews
Team and Roles
Survey Setup

? test_sup

Interview Key: 64-61-47-92(Assignment #5)

[ver:2] Action Area - Beneficial Ownership
Mode: CAPI

Duration: 11 minutes

Responsible: test_int

Supervisor: test_sup

Status: Completed

Updated: 13 hours ago

Calendar Event:

SHOW STATUS HISTORY

OVERVIEW

DOWNLOAD INTERVIEW TRANSCRIPT

APPROVE

REJECT

Progress:10/10 100%

Action Area: Beneficial Ownership

— Governance: Beneficial ownership of companies

Existence

Elements

+ Availability: Beneficial ownership of companies

Filter Questions

☐ With comments (1)

☐ Flagged (1)

☐ No flag (12)

☐ Invalid (0)

☐ Valid (18)

☐ Answered (13)

☐ Not answered (0)

☐ For supervisor (0)

☐ For interviewer (10)

☐ Critical questions (6)

☐ Critical rules (0)

Reset all filters

Existence summary

Existence Question 4: Please summarize your answers to the preceding existence sub-questions, including the extent of existence.

Drawing on the research you have conducted and the evidence you have gathered for this section, describe what you have found (or not found) when answering the existence sub-questions for this indicator.

there is no evidence at all

Please provide the URL(s) for the evidence that supports the summary provided.

na

GOVERNANCE: BENEFICIAL OWNERSHIP OF COMPANIES

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Help | 24.06 (build 36194) | Get Interviewer App

After reviewing a survey, you have the choice to (1) approve the survey if there are any further clarifications needed from the researcher or (2) reject it if there are comments left for the researcher to resolve. To approve, click on the green Approve button; to reject, the red Reject button.

Default Workspace

Reports

Interviews

Team and Roles

Survey Setup

test_sup

Interview Key: 64-61-47-92(Assignment #5)

Duration: 11 minutes

Status: Completed

SHOW STATUS HISTORY

[ver:2] Action Area - Beneficial Ownership

Responsible: test_int

Updated: 13 hours ago

OVERVIEW

Mode: CAPI

Supervisor: test_sup

Calendar Event: DOWNLOAD INTERVIEW TRANSCRIPT

APPROVE

REJECT

Filter Questions

With comments (1)

Flagged (1)

No flag (12)

Invalid (0)

Valid (18)

Answered (13)

Not answered (0)

For supervisor (0)

For interviewer (10)

Critical questions (6)

Critical rules (0)

Reset all filters

Progress: 10/10

Action Area: 1

Governance: companies

Existence

Elements

Availability: B companies

Reject interview

Reject to original responsible

Reject and choose new responsible

Comment:

0 / 1500

REJECT

CANCEL

you have gathered for this

summary provided.

COMPANIES

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Help | 24.06 (build 36194) | Get Interviewer App

Whichever button is selected, a pop up confirmation screen will appear with the opportunity to provide a comment on the survey as a whole. At this confirmation screen, click on the blue OK to confirm your approval or rejection. Click on the CANCEL button to go back to the survey detail screen. **Please Kindly disregard the two options displayed on the “Reject interview” interface.**

Make sure you are certain of your decision before proceeding. There is no way to un-reject a questionnaire though you can un-approve a survey. Any surveys you approve will be immediately marked as “Approved by headquarters” and pending for further data quality check by the GDB team. And any surveys you rejected will be immediately returned to the corresponding regional coordinator.

Notification emails will be automatically sent to the coordinators or the researchers regarding the “Reject” decisions.

4.5 Notification Email for Re-Submitted and Re-Approved Surveys

We understand that it's not possible for you to monitor the status of surveys around the clock and take action in real time. To address this, we have implemented a technical system that conducts status checks and sends notification emails every two hours, commencing at 0:00 am (UTC-4) each day.

The system is designed to send you a notification email as a reminder for a ‘Approved by Supervisor’ status change if a previously rejected survey (by you) has been resubmitted and re-approved by the coordinator.

Please note that the system sends emails only when the above status changes remain unaddressed by you at the latest status check. For example, if a previously rejected survey was re-submitted and re-approved by a coordinator at 1:20 pm (UTC-4), and you have already taken action to reject or approve it by 1:58 pm (UTC-4), the system will not send you an email about the re-approval at the 2:00 pm (UTC-4) status check. However, if you have not taken any action by 2:00 pm (UTC-4) or if you take action after 2:00 pm (UTC-4), you will receive an email about the re-approval.

To ensure you receive these emails, please add 'help@globaldatabarometer.org' to your safe senders list to prevent them from being filtered into your spam folder. All emails sent to you will have a subject line starting with "[GDB]".