INSEAD

SOCIAL CAPITAL QUESTIONNAIRE
Instructions for Group Administrators
www.insead.edu.sg/socialcapital/

These instructions walk you through all the aspects of using the Social Capital Questionnaire tool as a Group Administrator. A Group Administrator is someone who has been given rights to create and manage the collection of network data for a certain group of people (i.e., people enrolled in a class, an executive program, or the like). The instructions describe the functionality of the Social Capital Questionnaire and its usage. The Group Administration chapter is essential to set up and manage the data collection, downloading, and generation of individual reports for the participants in your group. The Questionnaire Administration helps you customize your questionnaire, which requires special administration rights.

If you want to run a standard ego-centric questionnaire (see definition below - a sample is available by clicking on the Standard Questionnaire tab under **Demos**) and want to use one of the standard questionnaires available on the site, you can obtain an administrator login and password by clicking on the Group tab under **Sign-up** in the site's home page and following the instructions. If you need to customize your questionnaire or want to use a Full Network Questionnaire (see the description at the end of this document) please contact directly Prof. Martin Gargiulo (martin.gargiulo@insead.edu).

Overview / Dashboard page

The overview or dashboard is the first page you see when you login to the Social Capital site as an administrator. It shows you the latest status of your group(s) and reminds you of the different things you may need to do in order to follow-up on the participants or other tasks. For example, it tells you how many participants have not completed the survey and offers a quick link to send a reminder. Alternatively, if you have created a group but have not uploaded the participants yet, a quick link is provided for uploading them.

Note: Please note that all the groups you are administering may not appear on this first page, since it only shows recent activity. To view a complete list of all your groups and their options, click on **Groups** on the right hand menu.

Group Administration

A normal group administration typically involves the administrator creating a new group, uploading or adding participants, sending the login details to these participants asking them to complete the questionnaire, calculating results and generating the reports once the survey is closed.

1. **Creating a new group**
    - Click on the **Create New Group** option on the right menu. In the resulting page, you'll need to enter the following group details.
    - **Group Name** If you plan to have multiple groups for this program, you may want to identify each group with a marker (e.g., *Leading Change 2008*)
    - **Company.** (When applicable)
    - **Sharepoint Site Id.** (Only for INSEAD groups linked to Sharepoint platforms).
    - **Ego-Centric** or **Full-Network** questionnaire? Although most likely you will be using an Ego-Centric questionnaire, the system allows for both types of questionnaires. In an **Ego-Centric questionnaire**, the respondent is asked to name his or her contacts and to provide information about these contacts and their relationships. A **Full-Network questionnaire** maps the relationships among a pre-defined group of people (e.g., people working for INSEAD) and are used in the context of a research of a consulting project only. The following instructions assume that you will use an ego-centric

questionnaire. Go to the end of this document to learn more about Full Network questionnaires.

- **Questionnaire template**. Once you have selected **Ego-Centric**, a drop-down list of available templates appears, including questionnaires you might have created (Click here to see how to create a new questionnaire). Chose the questionnaire you will use in your survey from this list.
- **Master Group**. You can additionally include your group under other Master groups, or create your own master group (i.e., one group with the name of your program). Master groups serve as "data reference groups". Participant's individual network characteristics are compared with those of the people in the master group. The larger the group (such as MG, the Master Group that includes all people answering the survey), the more diverse the people you are comparing your participants to. We recommend creating a specific master group for your program. You can always decide later if you rather use a larger reference groups for your reports (
- **Welcome Message.** The message that a participant sees before answering the survey. **You do not need to include the deadline** in this message. It will be highlighted automatically below this welcome message for the participants. Click here to obtain a sample of welcome message. You can edit, copy and paste this message in the Welcome Message box
- **Deadline**. The date before which all participants have to answer the survey.
- **Reminder**. An automatic reminder will be sent on this date to participants who have not completed their questionnaire.
- **Online Report.** If you click on this box, reports will be available online to the participants for download once they are generated by the administrator. Alternatively, you may want to distribute the reports directly.

2. **Change group settings**

   - You can change some group details at any time during the administration of the survey. Click on **Groups** option on the right menu. Click on **Edit** next to the group deadline for the group you would like to edit. You can edit the following group details:
     - **Group Name**
     - **Company**
     - **Sharepoint Site Id** (only for INSEAD groups linked to Sharepoint platforms).
     - **Questionnaire.** This can be changed only if none of the participants has started the survey.
     - **Master Group**. You can create or change the Master Group any time before generating the reports.
     - **Welcome Message**. While this can be changed, we recommend not doing it after you have send login details to participants to ensure that all participants are exposed to the same opening message.
     - **Deadline.** You can extend the deadline if needed. Remember to save enough time for generating the individual reports and distribute them to participants (or for the participants to download and read their own reports if you chose to do it this way).
     - **Reminder.** You may change the date of the automatic reminder to be sent to participants who have not completed the survey.
     - **Online Report**. You may enable or disable the online reports at any time.

3. **Adding participants to a group**

   - Click on the **Groups** option on the right menu. Next to the group of your choice, under **Participants** click **Upload or Add**.
   - Click on **Upload** to upload a list of participants to your group. You actually upload a comma-delimited (.csv) in which each row contains the first name, last name, and email

of each participant, in this order. The first row of the file should have the first participant's details (not column headings). By default, the email is used as the login and passwords are automatically generated. You can easily create a .csv file by choosing to save an Excel file as a .csv file. A .csv file looks like this:

```
Martin,Gargiulo,martin.gargiulo@insead.edu
José Luis,González,jose-luis.gonzalez@insead.edu
```

- Please *check the format of the .csv file before uploading it to the system*. If a participant's first name, last name, or email is invalid or empty, that entry is skipped while uploading. The system will report the number of participants uploaded successfully at the end of the operation.
- Once you have uploaded the participants, check that the number of participants uploaded is correct. If not, open the participant's list by clicking on List on the Participants menu in your group and visually inspect the list of participants you uploaded. See next to learn how to add participants manually.
- **Note for INSEAD administrators:** Note for INSEAD administrators: Please use **Synchronize with Sharepoint** button If you have entered a Sharepoint Site Id for the group. The participants would be able to access the questionnaires directly by clicking on the link on their platform. For more details, see the section about Link to Sharepoint platforms.

o Click on the **Add** tab under **Participants** to add individual participants manually. A dialog box opens. You should enter the participant's first name, last name, email, and password. If you enter participants individually, you will need to create the password manually, ideally following the convention used for the existing participants (e.g., firstname1234). You can use this option to add participants who joined in later in the process.

4. Editing, Deleting and Moving participants

o Click on the **Groups** option on the right menu. Next to the group of your choice, under **Participants** click **List**.

o On the following page, you can see the list of participants in the group and their survey status. For each participant you can do one of the following:

- Click on **Edit** tab to change the participant details (**firstname, lastname, email, login and password**). In case you edit the username and/or password, be sure to send the login details to the participant again.
- Click on **Delete** tab to delete the participant from the group.
- Click on **Move** tab to move the participant from one group to another. You can only move participants between groups that you administer and the target group must have the same questionnaire as the source group.

5. Preview the group's questionnaire

o You can preview the questionnaire to see how it will appear to the participant. To do so, click on **Groups** option on the right menu. Go to your group and click on the **QUESTIONNAIRE {questionnaire name}** tab to see a preview of the questionnaire in a new window.

- Please note that this is just a dummy questionnaire page; if you enter a response, it will not be saved. We recommend that you browse through the entire questionnaire to make sure everything is in order.

6. Send Emails to participants

o Click on **Groups** in the right menu to go to the Group Management page. Under Message sub-heading, you can find links to send messages to participants.

- **Login Details**: An email to the participants with their login details, questionnaire link and deadline. Typically this is the first email that the participants would receive after adding them to the group. This is a system-generated email.

  - **Reminder**: An email reminding the participants to complete the survey before deadline. This also contains the login details and questionnaire link.
  - **General Message**: This allows you to send any customized message to your participants (or to an individual participant).

7. **Preparing report templates**

   - **Report Templates** are used to generate your participants' personal reports. A report template is a MS-Word file that contains references to variables in the data base containing the participants' data. Click here to view a sample of individual report. When you generate individual reports, these references are replaced by the values and graphs that correspond to the specific participant.
   - By default, your group would use the standard report template associated with the questionnaire you have selected. Normally you will not need to do anything about this, but read carefully the following two points if you have made changes to the questionnaire you are using or if you want to change the default template.
     - Please note that if you if you have edited the questionnaire you are using, **you may need to edit the report template.** You may want to edit the report template even if you did not change the questionnaire, to make it more suitable to your needs. To edit a report template, download the default template associated to your group by clicking on the **Report Template** tab under the **Reports** heading in your group. In the window that opens, simply click on the report name. Save the document that appears as an HTML (.htm) file to your disk and edit it afterwards using MS-Word.
     - Please note that report templates have specific page format requirements to maintain their appearance. If you are unsure on how to edit your report, contact Prof. Martin Gargiulo or our applications team for assistance.
   - To upload a new Report Template, Click on **Groups** in the right menu. Under the **Reports** sub-heading in your group, click on **Report Templates**. In the resulting page, browse and choose the corresponding HTML file on your disk and upload it to the server.
     - Please make sure that you have the right template before you generate the participants' personal reports. If you upload a new report template after generating any of the participants' reports, you will need to generate them again to make sure the changes in the template are reflected on the actual reports.

8. **Calculate individual network results**

   - Click on **Groups** in the right menu and go to the group for which you intend to calculate results.
   - Under the sub-heading **Reports**, *if at least one of your participants has completed the survey*, you can find a link to **Calculations**. Once you click on this link, a new page opens. You can chose to **Calculate Results Now** or **Schedule Calculations** for some later date when you expect all participants to complete the survey. You can calculate results as many times as you want, but we recommend that you wait until the deadline finishes and run these calculations together for all participants (or set up a scheduled time for calculations immediately after the deadline).

9. **Generating and printing individual reports**

   - Before generating or making available online the participants' individual reports, you need to run the calculations and make sure that a proper Report Template for the group exists (a default template is associated to your group by the system, but you may have decided to change it). After you have run the calculations and verified the existence of a report template, you need to generate the individual reports by following these steps:

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- Click on **Groups** in the right menu and go to your group in the Group Management page.
- Under the sub-heading **Reports**, click on **Personal Reports**. A new page opens.
- Chose your **Reference Group.** This is the group against which statistics for the participants will be compared. Typically, you will choose the master group for your program to ensure similarity in the participants' profiles, but you may choose any group you want from the available list. Only reference groups chosen as Master Groups when you set up the group are available at this stage, but you can change the list of available groups by changing the group settings (see above, **Changing group settings**). Choosing a larger group (such as MG) instead of the program-specific reference group increases the number of people for the comparison but decreases the similarity in the profiles between people in the program and those in the reference group.
- Select the variable used to identify contacts in the **Group Contacts in Network Graph** choice box. This is the variable that will identify contacts (alters) in the participant's (ego) network graph. Each type of contact is assigned a shape and a color according to his or her category (e.g., male or female). Typically, you want to choose a variable that helps you make a specific point when discussing results with participants. For example, if you want to emphasize the extent to which people have networks that are too focalized on their own work group but fail to cut across organizational divisions, you may want to chose a variable that identifies contacts by their place of work in the organization (i.e. **AWrk**). If you want to emphasize the cultural diversity of the networks (or lack thereof) you may want to chose the nationality of the contacts instead (**ANat**).
- Click on the **Generate All Reports** tab to generate all the reports for the participants who completed the survey. This may take some time, which increases with the size of the group. Alternatively, you can generate individual reports by clicking on the **Generate New** tab next to each participant's name.
- Each individual report is stored as a MS-Word file in the server and it is not automatically updated. If you have generated one or many individual reports but want to change them (for example, using a new reference group or a new variable to identify contacts) or if new participants have completed the survey *after* you have generated the reports, you need to generate them again following the same steps.
- You may also update an individual report by clicking on the **Update** tab next to the participant's name
- Once the reports are generated, click on the **View** tab to display them. A standard File Download dialog box appears.
- Click on the **Save** tab in the File Download dialog box and save the document to a file in a separate folder. By default, the file name is the name of the participant for easier identification. *Do not click on the* **Open** *tab* as the report may not open properly.
- Open the files you have saved using MS-Word and print them on a color printer, double or single side.
- Click on the **Enabled** tab in the **Online Reports to** allow participants to retrieve their individual reports online or to generate their own personalized reports.

10. **Download Group data**

   - You can either download **Group Statistics** or the participant's full raw data for any group you administer. **Group Statistics** are summary statistics for your group, typically used to present summary charts to the group during a session. Raw data are the full data from the survey. In most cases, you do not need to download raw data, unless you want to use them for further analysis.

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- To download **Group Statistics**, Click on **Groups** in the right menu and go to the Group Management page. Under **Reports** click on **Group Statistics.** You will get a MS Excel file containing average, maximum and minimum scores for the entire group. These values are indices calculated by the system based on different aspects of the participant's network and can be used to generate a number of graphs for your session. An Excel spreadsheet template with some standard graphs can be downloaded here. Replace the group statistics in the first worksheet with your data. The graphs in the second worksheet will be automatically updated. You may also edit those graphs (for example, by eliminating the comparison group) to suit your needs.
- If you need to **Download Raw Data**, click on Download on the right menu. In the page that opens you can choose the groups by questionnaire. Once you choose the questionnaire and group, you can click on **Download Ego or Download Alter** tabs. The Ego Data file contains all the participant's personal and work profile details. The Alter data file contains all the information on the contacts a participant cited in the questionnaire, including their characteristics, the relationship with the respondent and other contacts, etc. These data should be treated confidentially and used for research purposes only.
- The Download command also includes an option to **Download Roster**. This applies only to full network questionnaires.

11. **Link to Sharepoint platforms (INSEAD administrators only)**
    - Click here for detailed Instructions on how to link a Sharepoint site with Social Capital questionnaire. This will enable the participants to access the Social Capital web-site from Sharepoint directly without the need to login separately.

Questionnaire Administration

A Questionnaire is a specific set of questions that can be used in one or in many different surveys (groups). As group administrator, you may be able to create new or customize existing ego-centric questionnaire templates by adding, editing or deleting questions. To maintain data integrity and comparability, however, standard questions cannot be edited without permission. If you need to change some standard questions, please contact Prof. Martin Gargiulo.

1. **Preview a questionnaire**
    - To see how the questionnaire will appear to the participants, you can use the questionnaire preview. This allows you to browse through the entire questionnaire to make sure everything is in order. Note that this is only for viewing purposes: you cannot edit questions or enter responses in this preview.
    - Click on the **Questionnaire Templates** option on the right menu. You'll see a list of questionnaire templates that you have created in the system. Remember only those questionnaire templates which you own are displayed.
    - Click on **Preview** next to the questionnaire of your choice.
    - You can also preview a questionnaire by clicking on the **Groups** option on the menu to the right of the screen. Go to a group using the questionnaire you want to preview and click on the questionnaire name. The preview appears in a new window.

2. **Creating a new questionnaire**

   - Click on the **Questionnaire Templates** option on the right menu. You'll see a list of questionnaire templates that you have created in the system. Remember only those questionnaire templates which you own are displayed.
   - You can click on either of the two links under "Create new questionnaire: **From Scratch** | **Copy existing**"
   - If you select **From Scratch**, you'll need to manually add sections to the questionnaire and add questions to each section.
   - The **Copy existing** option will allow you to copy one of the existing questionnaires. You must specify a new name for the copy you are creating and choose the questionnaire you want to copy from. **This is the preferred mode of creating a new questionnaire** since you would not need to start from scratch. You can then Edit the newly created questionnaire copy and customize those sections/questions you want to.

3. **Editing an existing questionnaire**

   - **Limitations to editing questionnaires**
     - Only the questionnaire templates that you have created are displayed and available for further edition.
     - To maintain data integrity**, questions labeled as Standard cannot be edited without permission**, but you may delete them from your version of the questionnaire if necessary. Please contact directly Prof. Martin Gargiulo if you need to modify a standard question for your version of the survey.
     - You may add (and subsequently edit) non-standard questions at will following the instructions below.
     - A questionnaire cannot be edited once at least one participant has started to answer the survey, so please make sure to have a final version of the questionnaire before sending login details to the participants in your group.
   - **Editing questionnaire sections**
     - Click on the **Questionnaire Templates** option on the right menu. You will see a list of questionnaire templates that you have created in the system.
     - When you click on **Edit**, you will see the list of sections and their introductory messages in the next page. There are eight pre-defined sections in the Social Capital Questionnaire: **Personal, Job, Work Style, Contacts, Contact Details, Relationships, Resources, Network.**
     - You can edit the introductory message for each section if you need to do so,
     - Check the **Hidden** option next to each section if you do not wish to include a specific section in your questionnaire.
   - **Deleting questions.** You can delete a question by clicking on the **Delete** button.
   - **Creating non-standard questions**. To create a new non-standard question, click on **Add New Question** button at the bottom of the page.
   - In the following page, you can select which type of question you want to add. The types are described below.
     - **Single Field.** A single text field, such as a company name (it may be more than one word)
     - **Double fields.** A double text field (e.g., FirstName and Lastname)
     - **Number**. A single numeric field (e.g.: age or number of years in job)
     - **Choice** - A multiple choice question. (e.g., Industry).
     - **Country drop down**. Uses a pre-defined country list in the system. (e.g., nationality or country of residence)

- **Contact** (only applicable to the **Contacts** section of the questionnaire). Use this type if you want to add a new name-generator question. Name-generator questions are those in which the respondent is asked to name contacts in a particular category.
- **Date** (e.g., date of birth).

- Once you have selected the question type, click on the **Continue** tab at the bottom of the page. In the next page, you can specify the text of the question and add an optional comment that will appear in blue below the question. Typically, these comments provide clarifications on how to answer the question.
- To edit the questions in a particular section, you click on the section names displayed on top in green background.
- If you have selected a **Choice type** of question, you will need to enter the following details:
    - **Number of Choices** & **Display type**. Radio display list all the choices in a row. Drop-down display appears as a box with a drop-down menu of choices. We recommend using a drop-down display only when you have more than six choices or when the text of your choices is too long to fit in the page.
    - **Caption**. The text that appears next to each choice.
    - **Short Caption**. This is a short label to identify the choice in the Individual Reports. We recommend to add short captions always, and especially so when the text of the choices is long.
    - **Value.** A numeric value associated with each choice. Should be unique for each choice and typically goes like 1,2,3,4 etc.
    - **Code.** A small code that can be associated with a choice. Should be unique for each choice and it can be either letters (i.e., M, F) or numbers**.**
- You also need to enter the name of a **Variable** under which you want to store the response(s) for this question. Each question in the Social Capital Questionnaire is uniquely linked to a variable that stores the information in the master database. Variable names should be one word only (such as *Altage* for alter's age).
- For a **Contact** type question you will also need to enter the maximum possible contacts that a participant can cite under that question. The text fields are automatically linked to variables AlterFirstName and AlterLastInitial. The variable you choose is the one that stores the binary value whether a contact was cited in that question.
- To **edit a non-standard question**, just click on the text of the question. To maintain data integrity, standard questions cannot be edited without permission from Prof. Martin Gargiulo. Note that you can only change the question text and comment and choice captions etc. You cannot change the question type. If you want to change a text question to say choice type, then you will need to delete the existing question and create a new one again.

Full Network Questionnaire

- A full network questionnaire is designed to measure one or more relationships among all the people in a pre-defined population, such as the people working for a given firm. They are used mostly for consulting or research purposes
- The **Social Capital** tool can allow you to conduct a full-network study using both open and closed name generator questions. In open questions, the respondent simply types in the name of the person that corresponds to the specific relationship he or she is asked for. In closed name generator questions, the respondent can chose from a roster of possible contacts provider by the researcher.
- Unless you are trained in network analysis, you may need extra help to set up a full network survey and to analyze the data. Please contact Prof. Martin Gargiulo (martin.gargiulo@insead.edu) if you need assistance.