



Colectica for Microsoft Excel

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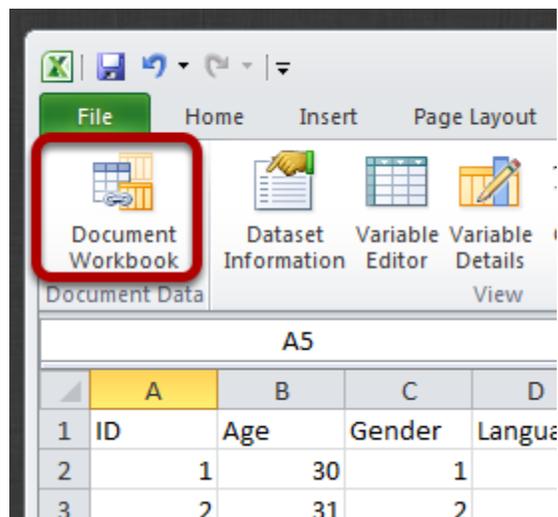
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Document your Data

Document your Excel Workbook

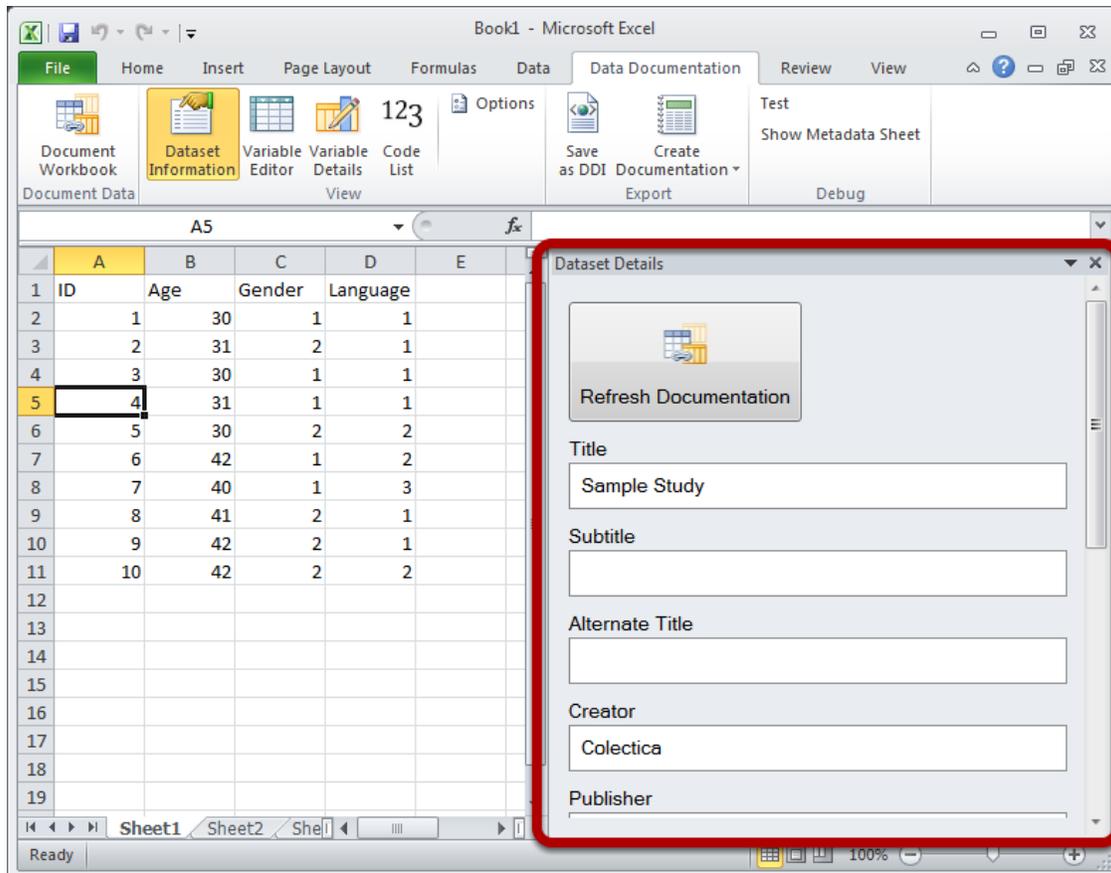
Attaching documentation to your Excel workbook allows you to add information to about each column in your file, as well as general information about the file itself.

On the Data Documentation ribbon tab, click the Document Workbook button



After clicking the Document Workbook button, Colectica will embed information in your workbook to document your data file and each column. You can add more detailed information by following the steps below.

Use the Dataset Details pane to add information about your data file



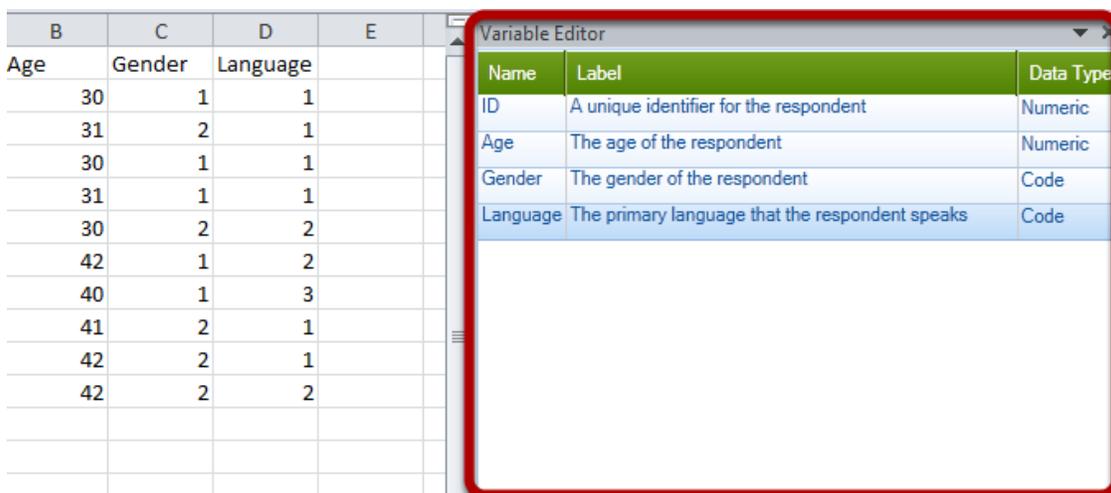
The screenshot shows the Microsoft Excel interface with the 'Data Documentation' ribbon selected. The 'Dataset Information' button is highlighted. A 'Dataset Details' pane is open on the right, containing the following fields:

- Refresh Documentation (button)
- Title: Sample Study
- Subtitle: (empty)
- Alternate Title: (empty)
- Creator: Colectica
- Publisher: (empty)

The background Excel spreadsheet contains the following data:

	A	B	C	D	E
1	ID	Age	Gender	Language	
2	1	30	1	1	
3	2	31	2	1	
4	3	30	1	1	
5	4	31	1	1	
6	5	30	2	2	
7	6	42	1	2	
8	7	40	1	3	
9	8	41	2	1	
10	9	42	2	1	
11	10	42	2	2	

Use the Variable Editor to add information about each column



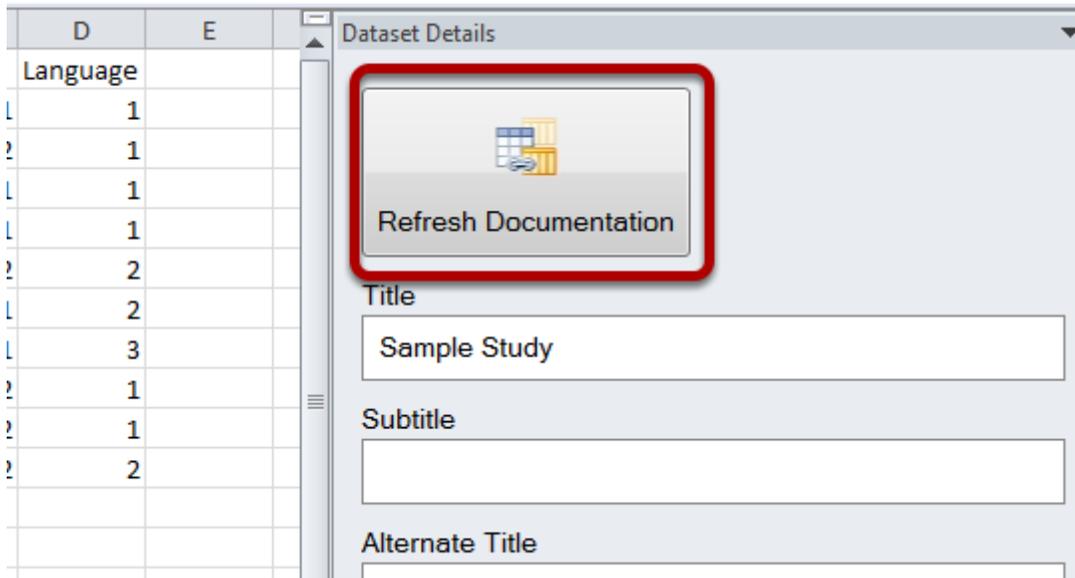
The screenshot shows the Microsoft Excel interface with the 'Variable Editor' pane open on the right. The pane is highlighted with a red border and contains the following table:

Name	Label	Data Type
ID	A unique identifier for the respondent	Numeric
Age	The age of the respondent	Numeric
Gender	The gender of the respondent	Code
Language	The primary language that the respondent speaks	Code

The background Excel spreadsheet shows the following data:

	B	C	D	E
	Age	Gender	Language	
	30	1	1	
	31	2	1	
	30	1	1	
	31	1	1	
	30	2	2	
	42	1	2	
	40	1	3	
	41	2	1	
	42	2	1	
	42	2	2	

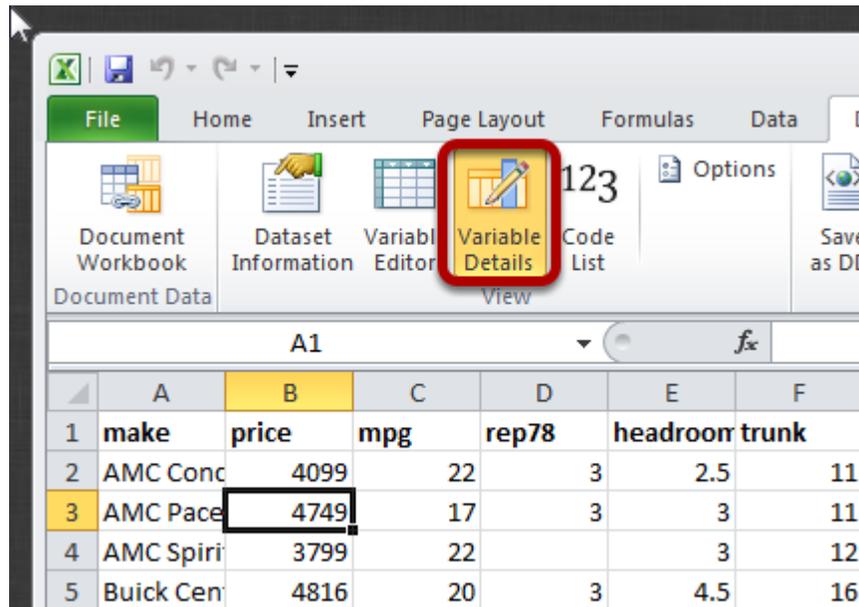
If you add or remove columns, click the Refresh Documentation button in the Dataset Details pane



The Refresh Documentation button will attach documentation for any new columns you have added, remove information for any deleted columns, and update column names within the documentation.

Add Detailed Information about each Column

On the ribbon, select the Variable Details button to show the Variable Details pane



The Variable Details pane shows details for the column where the cursor is located.

Enter a Label and Description for the column

H	I	J
length	turn	displacem
186	40	12
173	40	25
168	35	12
196	40	19
222	43	35
218	43	23
170	34	30
200	42	19
207	43	23
200	42	23
221	44	42
204	43	35
204	45	35
163	34	23
212	43	25
193	31	20

Variable Details

turn

Label

Turn Circle (ft.)

Description

The turning circle of a vehicle is the size of the smallest circular turn (i.e. U-turn) that the vehicle is capable of making.

Data Type

Numeric

Type

Integer

Choose a Data Type for the column, and fill in some details

H	I	J
length	turn	displacement
186	40	1200
173	40	2500
168	35	1200
196	40	1900
222	43	3500
218	43	2300
170	34	3000
200	42	1900
207	43	2300
200	42	2300
221	44	4200
204	43	3500
204	45	3500
163	34	2300
212	43	2500
193	31	2000
200	41	2000
179	40	1500
197	43	2500

Variable Details

The turning circle of a vehicle is the size of the smallest circular turn (i.e. U-turn) that the vehicle is capable of making.

Data Type
 Numeric

Type
 Integer

Additivity
 Stock

Minimum
 1

Maximum
 100

If your column has coded data, create a new code list or use an existing code list

See [Create a Code List for a Column](#) and [Reuse a Code List](#) for instructions on defining code lists for columns.

Specify a measurement unit and role for the column, if appropriate

H	I	J
length	turn	displacement
186	40	12
173	40	25
168	35	12
196	40	19
222	43	35
218	43	23
170	34	30
200	42	19
207	43	23
200	42	23
221	44	42
204	43	35
204	45	35
163	34	23

Variable Details

Maximum
100

Scale
[]

Variable is a weight

Measurement Unit
feet

Role
[]

Role can indicate whether the column represents an identifier, a [weight](#), or serves some other purpose.

Specify what type of item the column is about

44	42
43	35
45	35
34	23
43	25
31	20
41	20
40	15
43	25
35	9
46	31
46	31

Role
[]

Analysis Unit
Object

Response Unit
Informant

[+]

The Analysis Unit describes what type of entity the data in this variable is about.

- **Individual:** Any individual person.

- **Organization:** Any kind of formal administrative and functional structure - includes associations, institutions, agencies, businesses, political parties, schools, etc.
- **Family:** Two or more people related by blood, marriage (including step-relations), adoption or fostering and who may or may not live together (National Community Services Data Dictionary, Vers 3, AIHW, 2004). For example, used when researching the extent to which people provide support and assistance for their relatives.
- **Family: Household family:** A more specific term, refers only to related people who live in the same household at a point in time. If not known whether the analysis unit is Family or Household family, use Family.
- **Household:** A person or a group of persons who share the same dwelling unit and common living arrangements. These common living arrangements may include pooling some, or all, of their income and wealth, and consuming certain types of goods and services collectively, mainly housing and food (Eurostat).
- **Housing Unit:** U.S. Census: A housing unit is a house, an apartment, a mobile home, a group of rooms, or a single room that is occupied (or if vacant, is intended for occupancy) as separate living quarters. Separate living quarters are those in which the occupants live and eat separately from any other persons in the building and which have direct access from the outside of the building or through a common hall.
- **Event/Process:** Any type of incident, occurrence, or activity. Events are usually one-time, individual occurrences, with a limited, or short duration. Examples: criminal offenses, riots, meetings, elections, sports competitions, terrorist attacks, natural disasters like floods, etc. Processes typically take place over time, and may include multiple events or gradual changes that ultimately lead, or are projected to lead, to a particular result. Examples: court trials, criminal investigations, political campaigns, medical treatments, education, athletes' training, etc.
- **Geographic Unit:** Any entity that can be spatially defined as a geographic area, with either natural (physical) or administrative boundaries.
- **Time Unit:** Any period of time: year, week, month, day, or bimonthly or quarterly periods, etc.
- **Text Unit:** Books, articles, any written piece/entity.
- **Group:** Two or more individuals assembled together or having some unifying relationship.
- **Object:** Anything material, but inanimate, that has an independent existence and may be perceived by the senses. Examples: objects of art (paintings, sculptures, etc.) or weapons, or vehicles, etc.
- **Other:** Use if the unit of analysis is known, but not found in the list.

Specify who provided the data contained in the column

44	42	Role
43	35	
45	35	
34	23	Analysis Unit
43	25	Object
31	20	
41	20	Response Unit
40	15	Informant
43	25	
35	9	
46	31	
46	21	

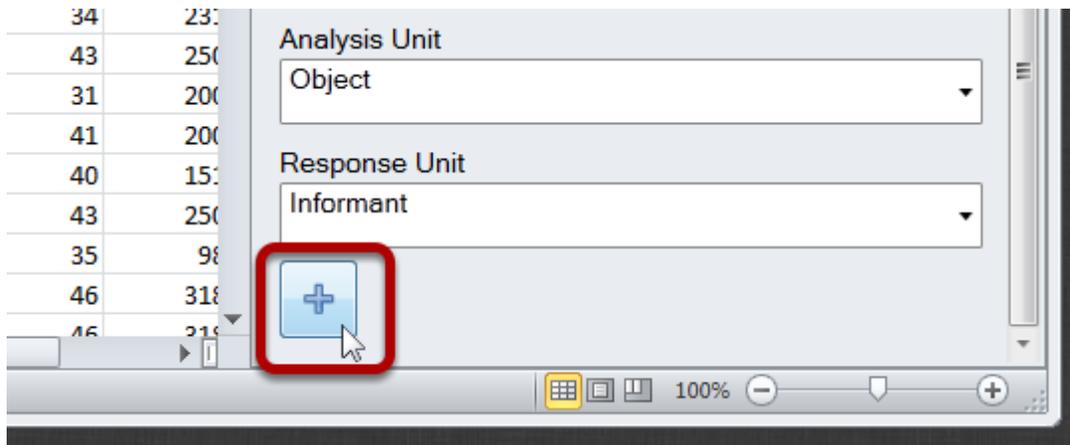
The Response Unit describes the source of the data held by this column.

- **Self:** The source of data is same as unit of observation/analysis.
- **Informant:** The source of data is different than the unit of observation as part of the study design.
- **Proxy:** The source of data is different than the unit of analysis because the sampled unit is unavailable/unable to participate.
- **Interviewer:** Data are entered directly by an interviewer, as a result of his/her own observations, and not by eliciting answers to a question.
- **Other:** Use if the response unit is known, but not found in the list.

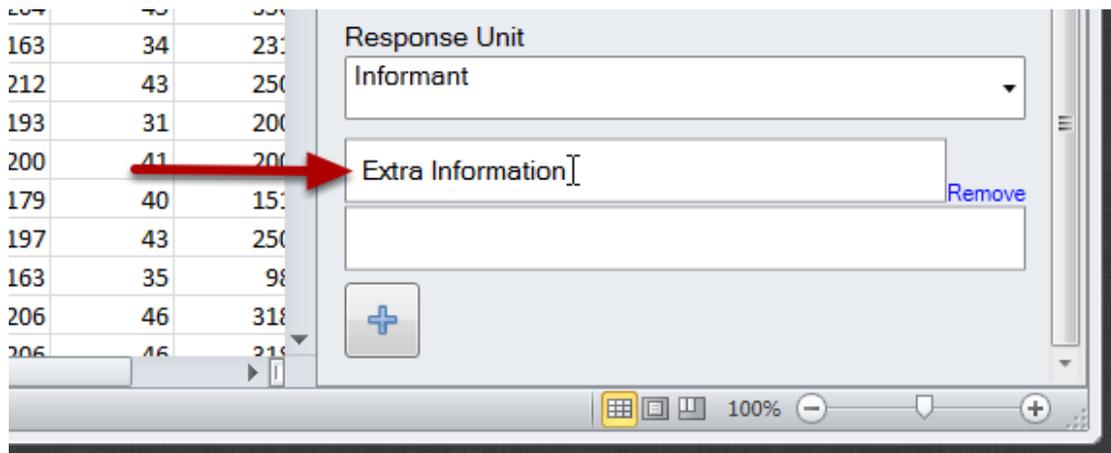
Add Additional Fields to your Documentation

If you would like to capture information beyond what the built-in fields for in the dataset or variable editors allow, you can add extra fields. You can add as many extra fields as you like.

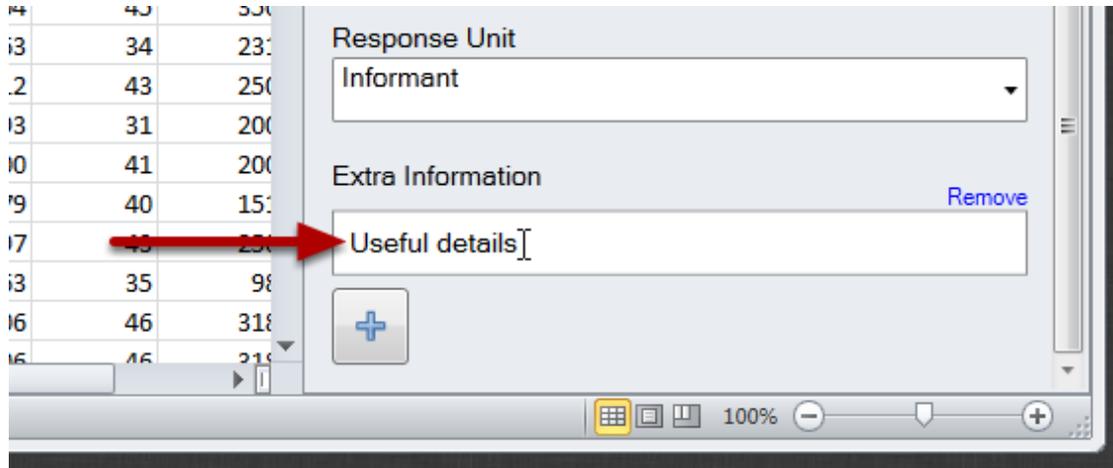
At the bottom of the pane, click the Add button



Enter a name for your property



Enter a value for your property

A screenshot of the Colectica software interface. On the left, a table with three columns is partially visible. A red arrow points from the second column of the table to a text input field in the 'Extra Information' section. The input field contains the text 'Useful details'. Below the input field is a blue plus sign button. The 'Response Unit' section above shows a dropdown menu with 'Informant' selected. The 'Extra Information' section has a 'Remove' link to the right. The bottom of the window shows a taskbar with a grid icon, a 100% zoom level, and navigation arrows.

4	43	330
13	34	230
2	43	250
13	31	200
10	41	200
9	40	150
17	43	230
13	35	98
16	46	318
16	46	318

Response Unit
Informant

Extra Information [Remove](#)

Useful details

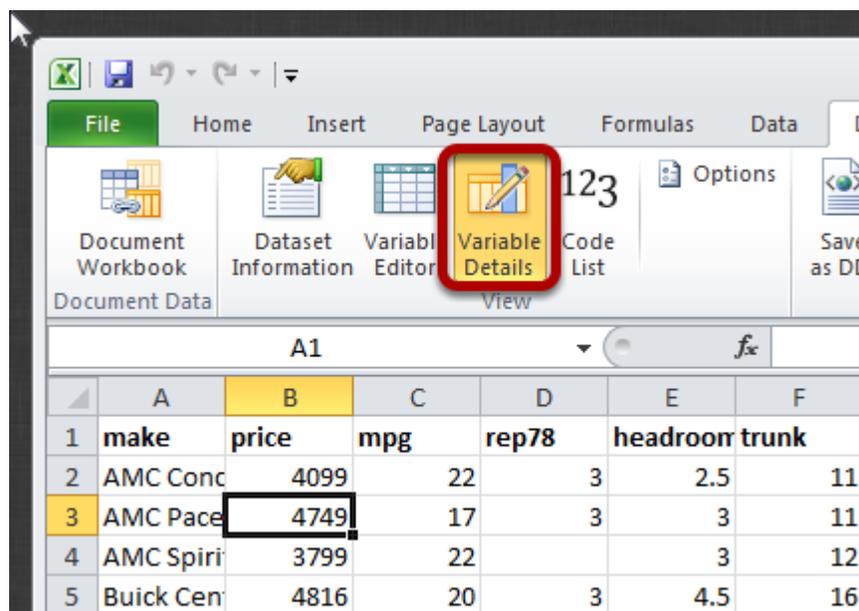
+

100%

Create a Code List for a Column

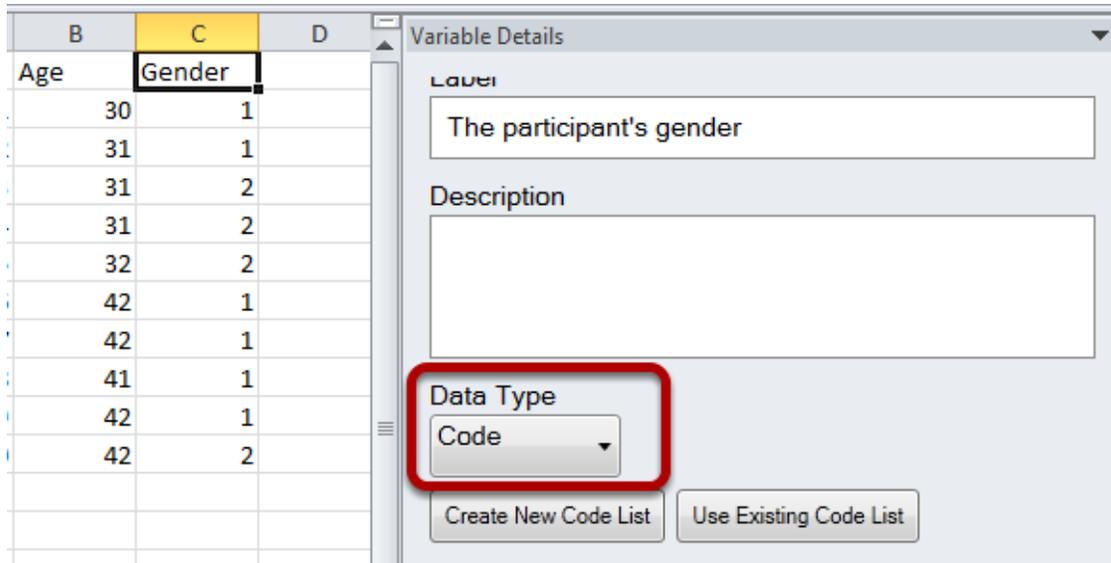
Often, numeric data correspond to labelled information. For example, a dataset may use the number 1 to represent Males, and 2 to represent Females. Of course, it is much easier to make sense of coded data when the values for each number are documented, so Colectica allows you to do this.

On the ribbon, select the **Variable Details** button to show the **Variable Details** pane

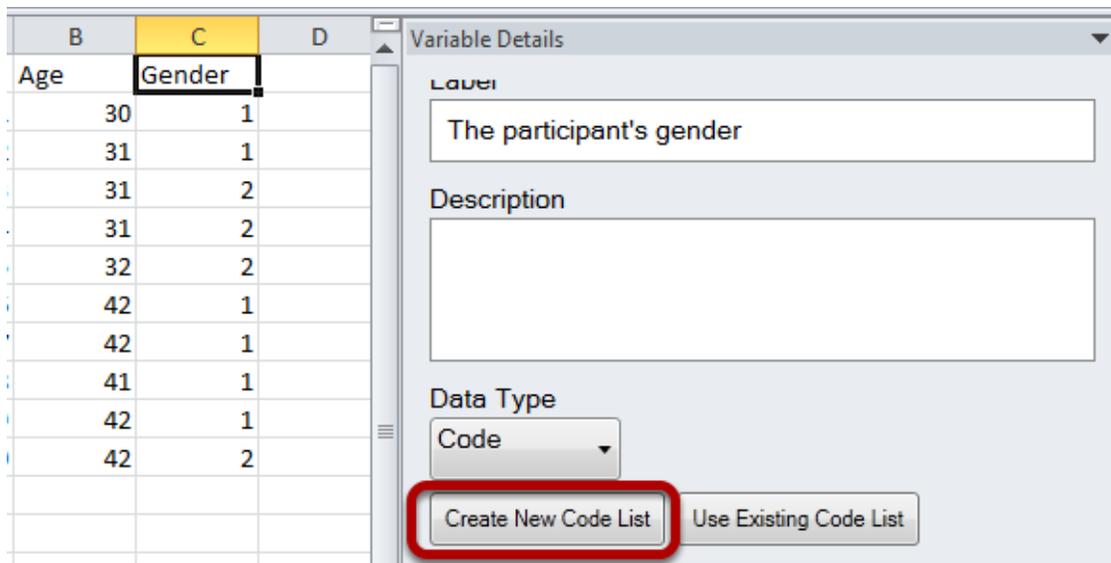


The Variable Details pane shows details for the column where the cursor is located.

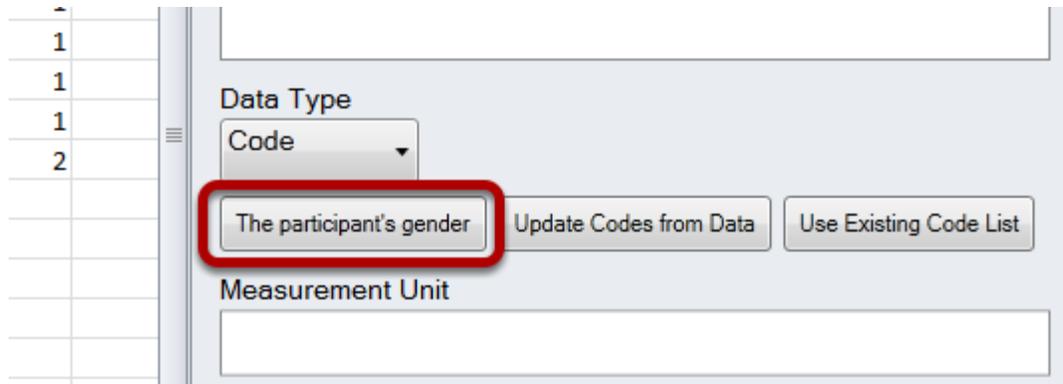
For the Data Type, choose Code

A screenshot of the 'Variable Details' dialog box in a software application. The dialog is open over a spreadsheet. The spreadsheet has columns B, C, and D. Column B is labeled 'Age' and contains values 30, 31, 31, 31, 32, 42, 42, 41, 42, 42. Column C is labeled 'Gender' and contains values 1, 1, 2, 2, 2, 1, 1, 1, 1, 2. The 'Variable Details' dialog has a 'Level' field with the text 'The participant's gender'. Below it is a 'Description' field. The 'Data Type' dropdown menu is set to 'Code' and is highlighted with a red rectangle. At the bottom of the dialog are two buttons: 'Create New Code List' and 'Use Existing Code List'.

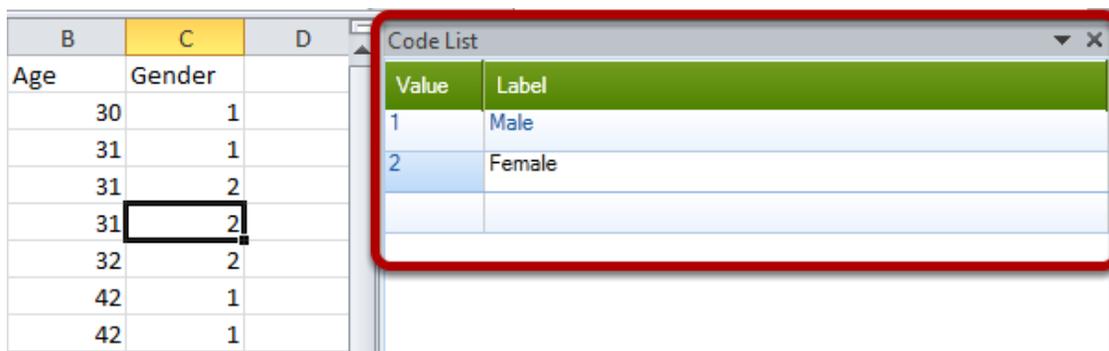
Click the Create New Code List button

A screenshot of the 'Variable Details' dialog box, identical to the one above. In this view, the 'Create New Code List' button at the bottom left of the dialog is highlighted with a red rectangle. The 'Data Type' dropdown menu remains set to 'Code'.

To edit codes, click the button for your code list

A screenshot of the Colectica software interface. On the left, a vertical list of numbers (1, 1, 1, 2) is visible. The main panel shows a 'Data Type' dropdown menu set to 'Code'. Below this, a button labeled 'The participant's gender' is highlighted with a red rectangular box. To its right are two other buttons: 'Update Codes from Data' and 'Use Existing Code List'. Below these buttons is a 'Measurement Unit' input field.

Add labels for each coded value

A screenshot of an Excel spreadsheet with a 'Code List' dialog box open. The spreadsheet has columns B, C, and D. Column B is labeled 'Age' and column C is labeled 'Gender'. The data in column C is: 1, 1, 2, 2, 2, 1, 1. The 'Code List' dialog box is a small window with a title bar 'Code List' and a close button 'X'. It contains a table with two columns: 'Value' and 'Label'. The table has two rows: the first row has '1' in the 'Value' column and 'Male' in the 'Label' column; the second row has '2' in the 'Value' column and 'Female' in the 'Label' column. The dialog box is highlighted with a red border.

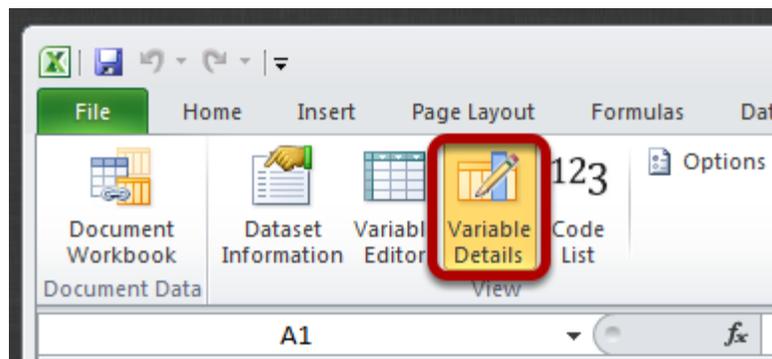
Reuse a Code List

Often, numeric data correspond to labelled information. For example, a dataset may use the number 1 to represent Males, and 2 to represent Females. Of course, it is much easier to make sense of coded data when the values for each number are documented, so Colectica allows you to do this.

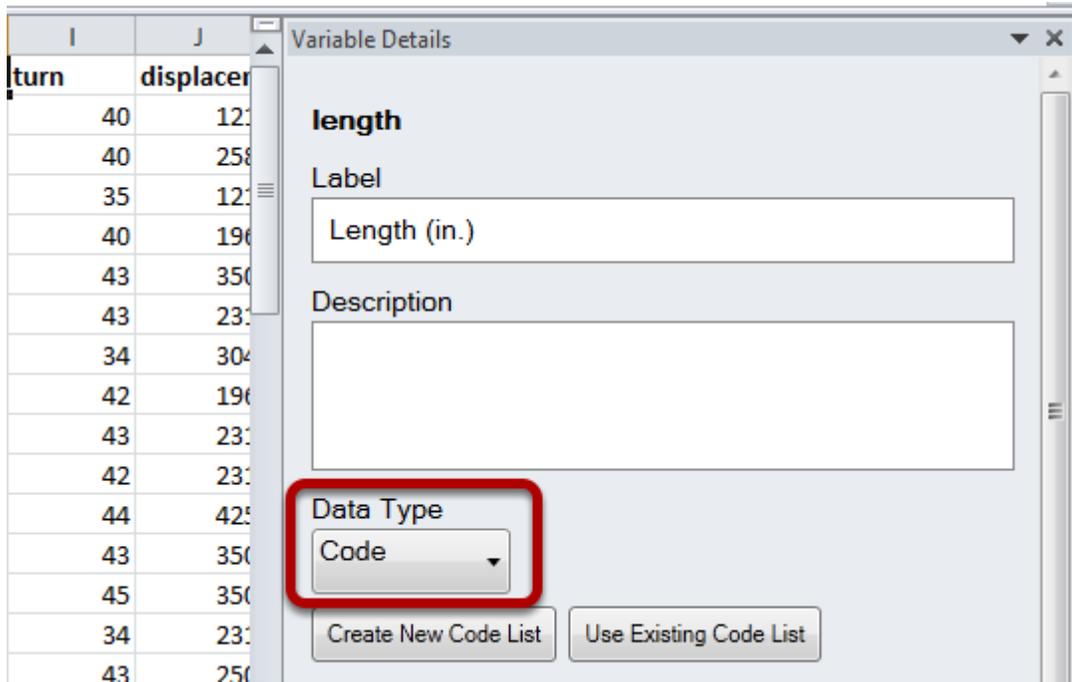
For instructions on creating a code list for a column, see [Create a Code List for a Column](#).

Additionally, you can re-use a code list if it applies to multiple columns.

Open the Variable Details pane for the column

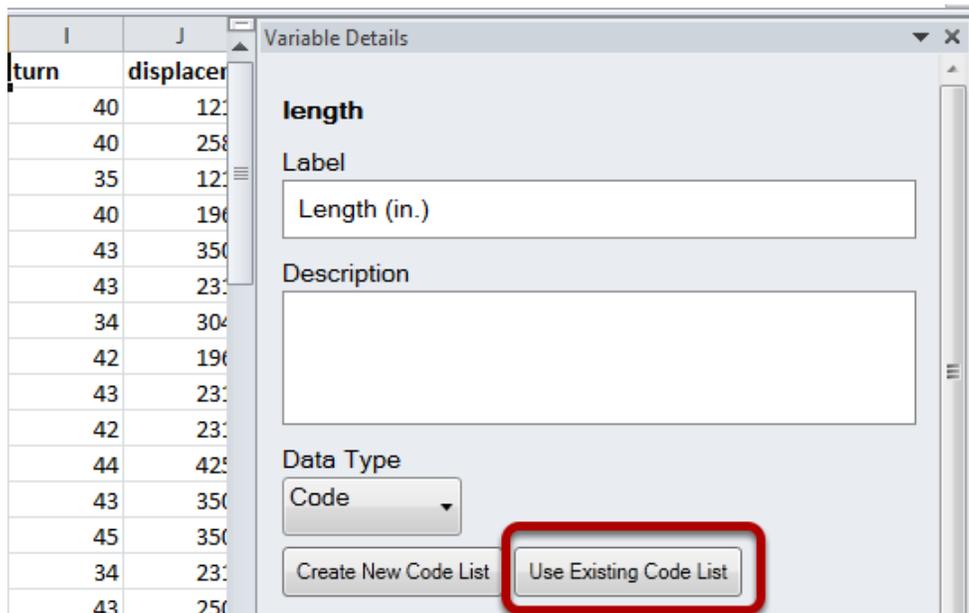


For the Data Type, select Code

A screenshot of the 'Variable Details' dialog box in a software application. The dialog is open over a spreadsheet. The spreadsheet has columns 'I' and 'J' and rows of data. The dialog box has a 'length' field, a 'Label' field containing 'Length (in.)', and a 'Description' field. The 'Data Type' dropdown menu is highlighted with a red box and is set to 'Code'. Below the dropdown are two buttons: 'Create New Code List' and 'Use Existing Code List'.

I	J
turn	displacer
40	123
40	258
35	123
40	196
43	350
43	231
34	304
42	196
43	231
42	231
44	425
43	350
45	350
34	231
43	250

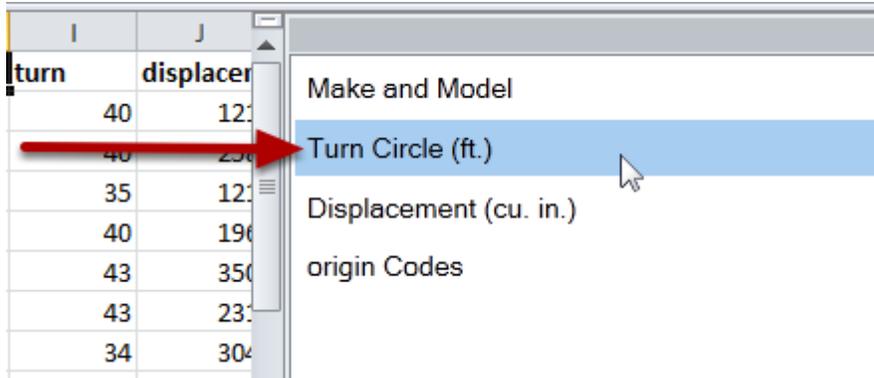
Click the Use Existing Code List button

A screenshot of the 'Variable Details' dialog box, similar to the previous one. The 'Data Type' dropdown is still set to 'Code'. The 'Use Existing Code List' button is now highlighted with a red box, indicating it is the next step in the process.

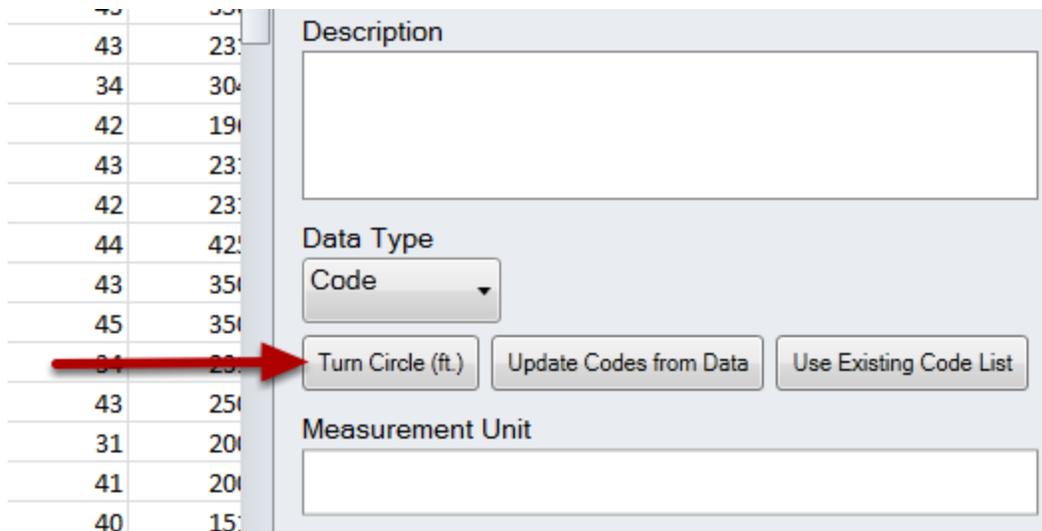
I	J
turn	displacer
40	123
40	258
35	123
40	196
43	350
43	231
34	304
42	196
43	231
42	231
44	425
43	350
45	350
34	231
43	250

After clicking the Use Existing Code List button, a list of available code lists from your workbook is displayed.

Double click the code list you would like to use



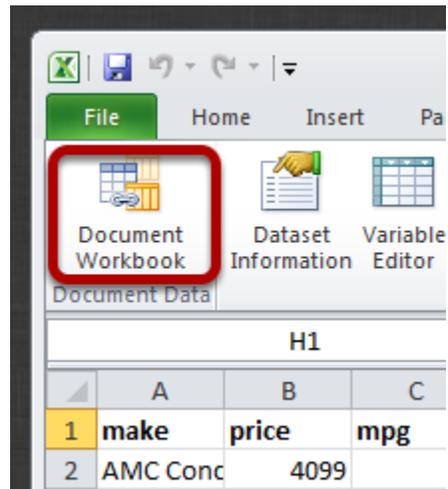
The code list will be displayed in the Variable Details pane



Publish your Documentation

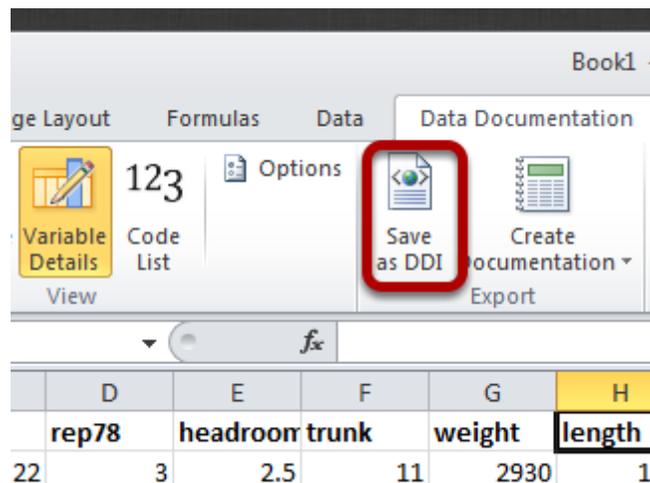
Export Information to Standardized XML

Document your Excel file.

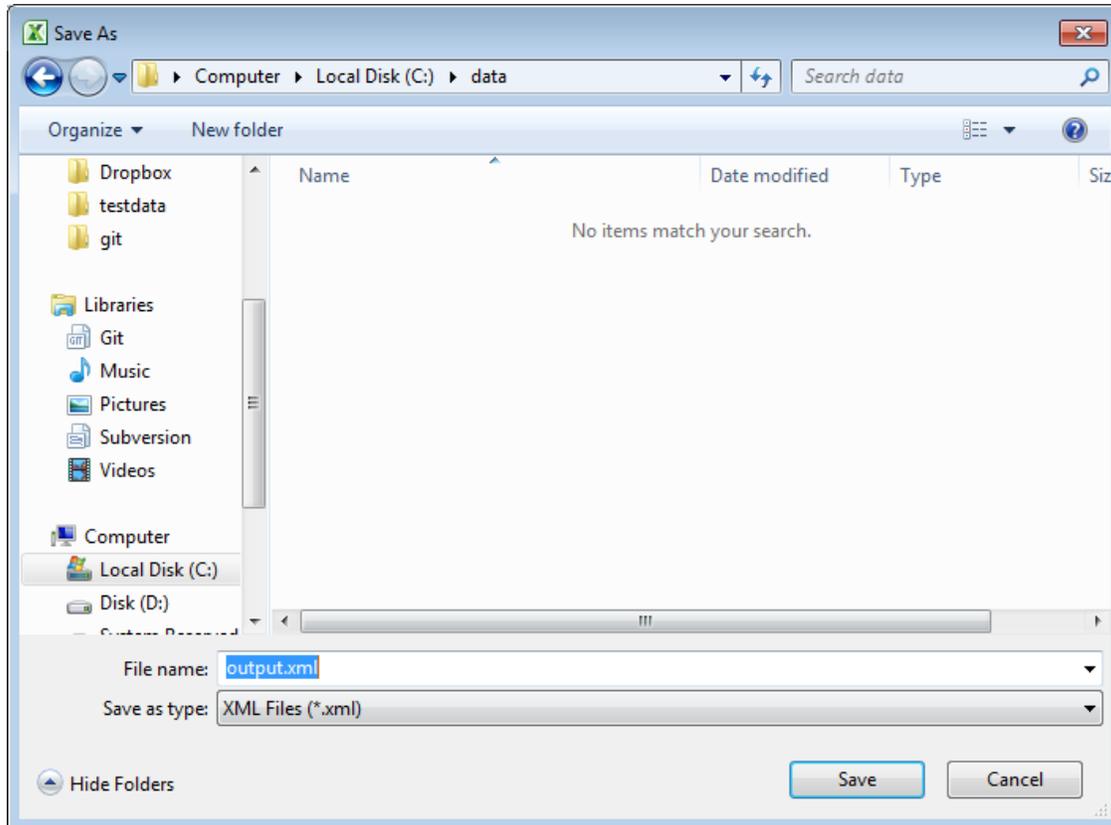


Follow the instructions in [Document your Excel Workbook](#) to document your Excel workbook.

On the Data Documentation ribbon, click the Save as DDI button

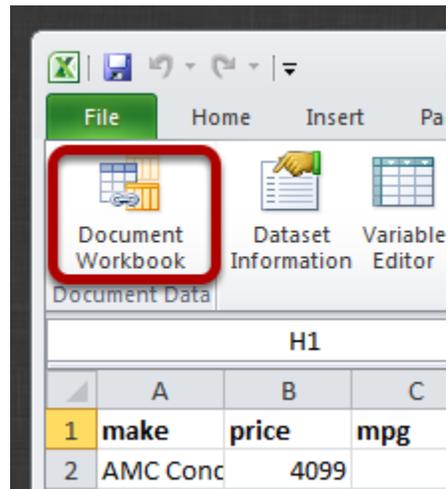


Choose where your file will be saved



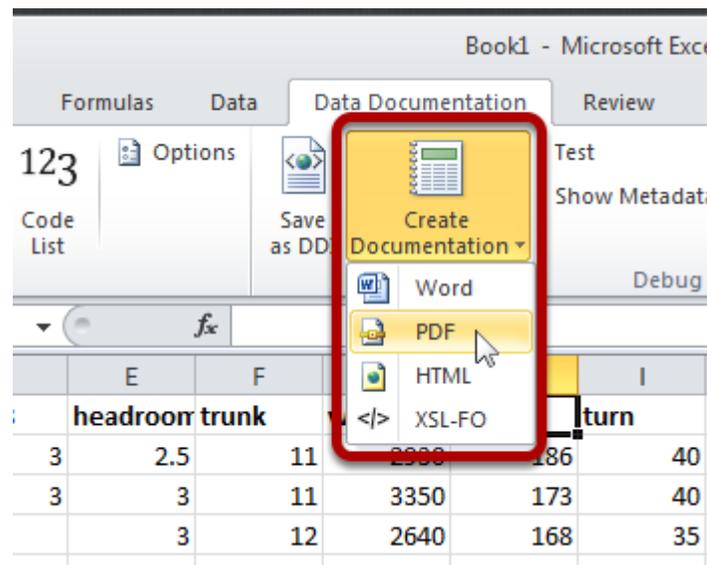
Create Publishable Documentation

Document your Excel file.

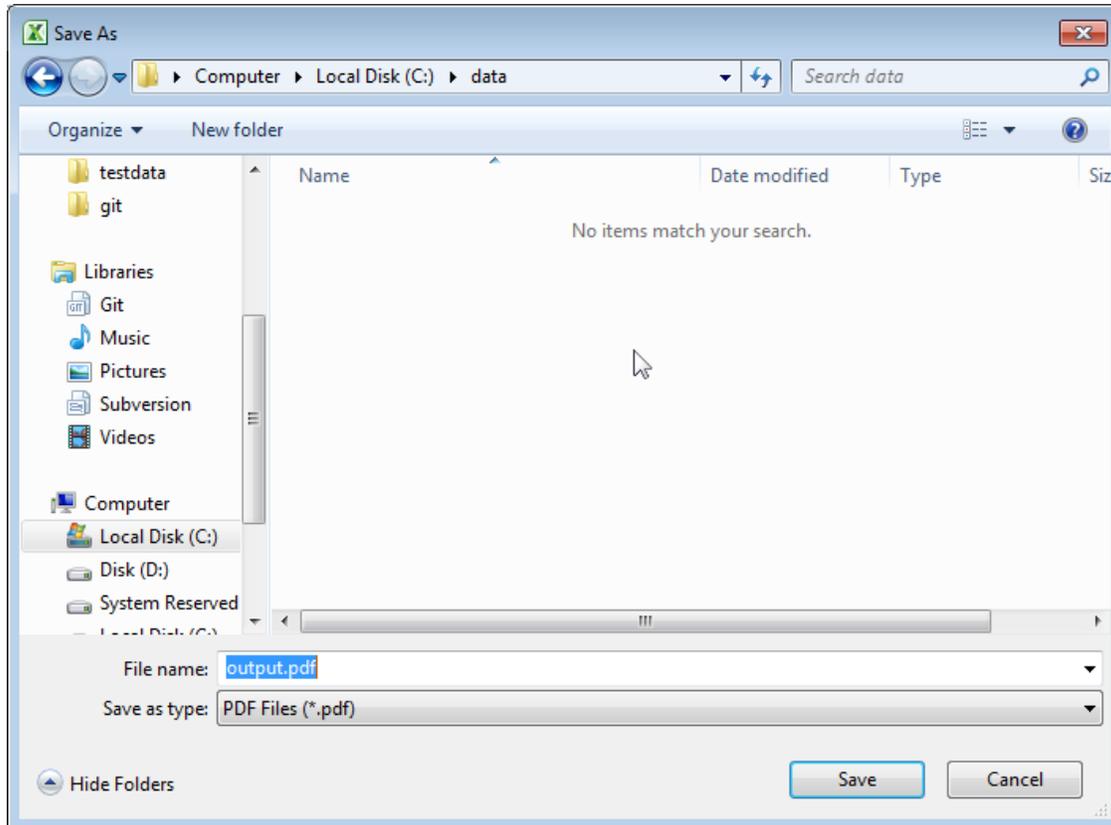


Follow the instructions in [Document your Excel Workbook](#) to document your Excel workbook.

In the Data Documentation ribbon, choose Create Documentation and choose a format



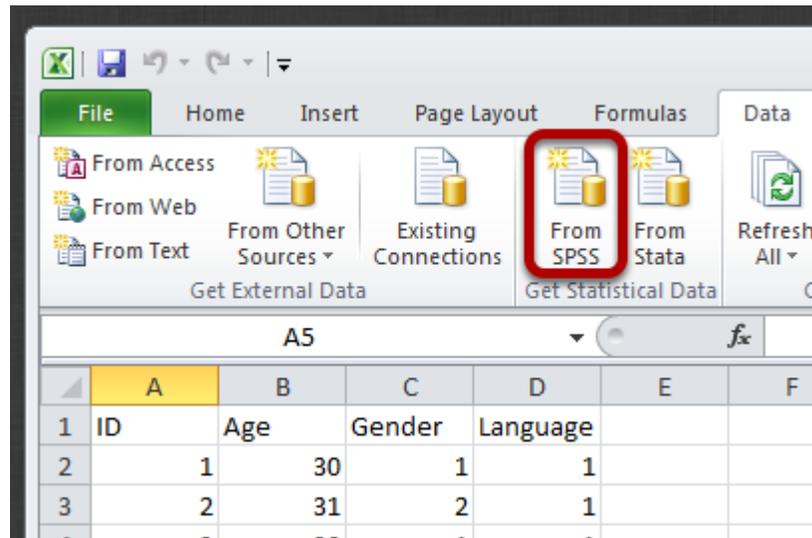
Choose the location where your documentation will be saved



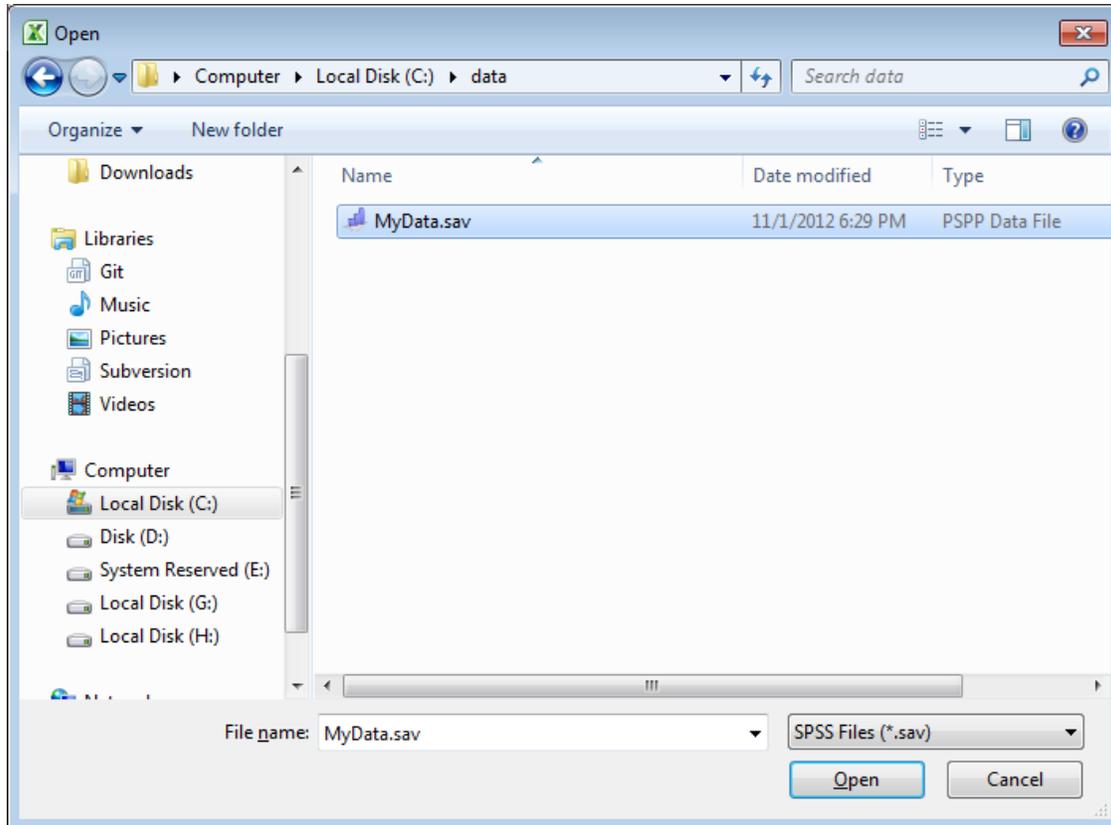
Import Existing Data into Microsoft Excel

Import Data from SPSS

On the Data ribbon tab, click the From SPSS button



Choose the file to be imported



Your data and related documentation will appear

	A	B	C	D	E	F	G	H	I	J
1	make	price	mpg	rep78	headroom	trunk	weight	length	turn	displac
2	AMC Conc	4099	22	3	2.5	11	2930	186	40	121
3	AMC Pace	4749	17	3	3	11	3350	173	40	258
4	AMC Spiri	3799	22		3	12	2640	168	35	121
5	Buick Cen	4816	20	3	4.5	16	3250	196	40	196
6	Buick Elec	7827	15	4	4	20	4080	222	43	350
7	Buick LeSa	5788	18	3	4	21	3670	218	43	231
8	Buick Ope	4453	26		3	10	2230	170	34	304
9	Buick Reg	5189	20	3	2	16	3280	200	42	196
10	Buick Riv	10372	16	3	3.5	17	3880	207	43	231
11	Buick Skyl	4082	19	3	3.5	13	3400	200	42	231
12	Cad. Devil	11385	14	3	4	20	4330	221	44	429
13	Cad. Eldor	14500	14	2	3.5	16	3900	204	43	350
14	Cad. Sevil	15906	21	3	3	13	4290	204	45	350

Variable Details

mpg

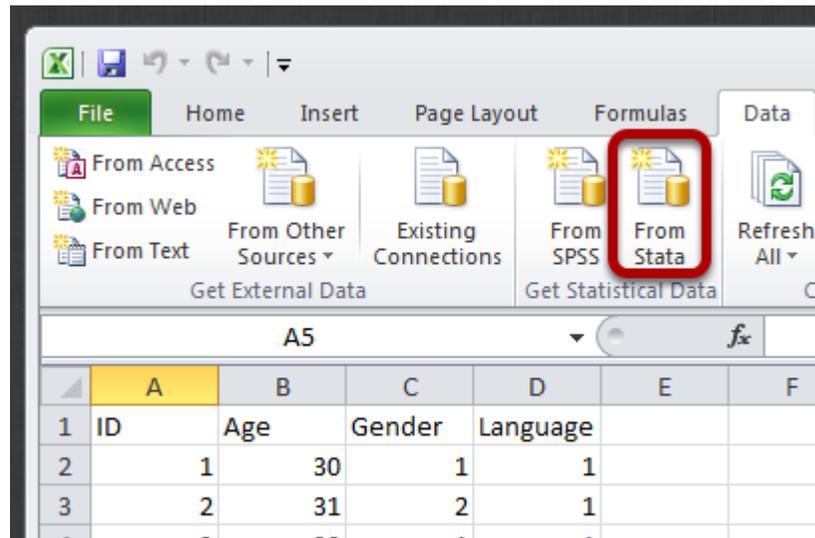
Label
Mileage (mpg)

Description

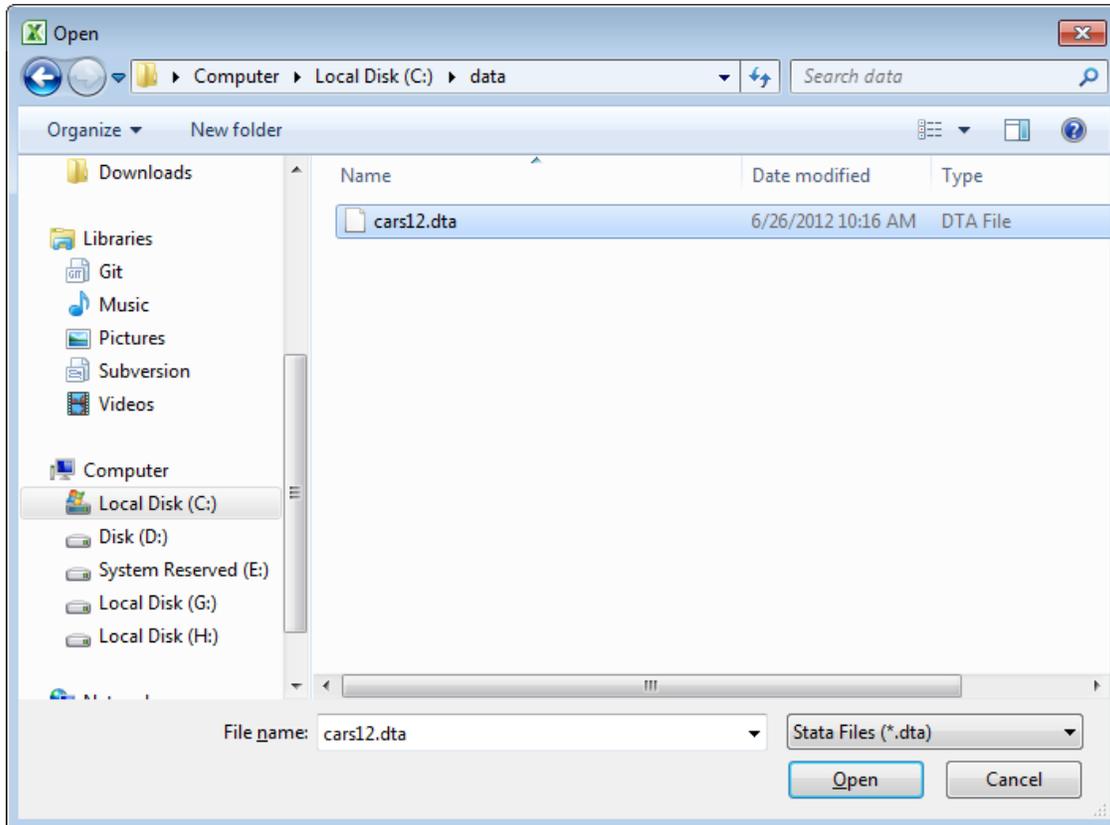
Data Type
Numeric

Import Data from Stata

On the Data ribbon tab, click the From Stata button



Choose the file to be imported



Your data and related documentation will appear

	A	B	C	D	E	F	G	H	I	J
1	make	price	mpg	rep78	headroom	trunk	weight	length	turn	displac
2	AMC Conc	4099	22	3	2.5	11	2930	186	40	121
3	AMC Pace	4749	17	3	3	11	3350	173	40	258
4	AMC Spiri	3799	22		3	12	2640	168	35	121
5	Buick Cen	4816	20	3	4.5	16	3250	196	40	196
6	Buick Elec	7827	15	4	4	20	4080	222	43	350
7	Buick LeSa	5788	18	3	4	21	3670	218	43	231
8	Buick Ope	4453	26		3	10	2230	170	34	304
9	Buick Reg	5189	20	3	2	16	3280	200	42	196
10	Buick Riv	10372	16	3	3.5	17	3880	207	43	231
11	Buick Skyl	4082	19	3	3.5	13	3400	200	42	231
12	Cad. Devil	11385	14	3	4	20	4330	221	44	429
13	Cad. Eldor	14500	14	2	3.5	16	3900	204	43	350
14	Cad. Sevil	15906	21	3	3	13	4290	204	45	350

Variable Details

mpg

Label
Mileage (mpg)

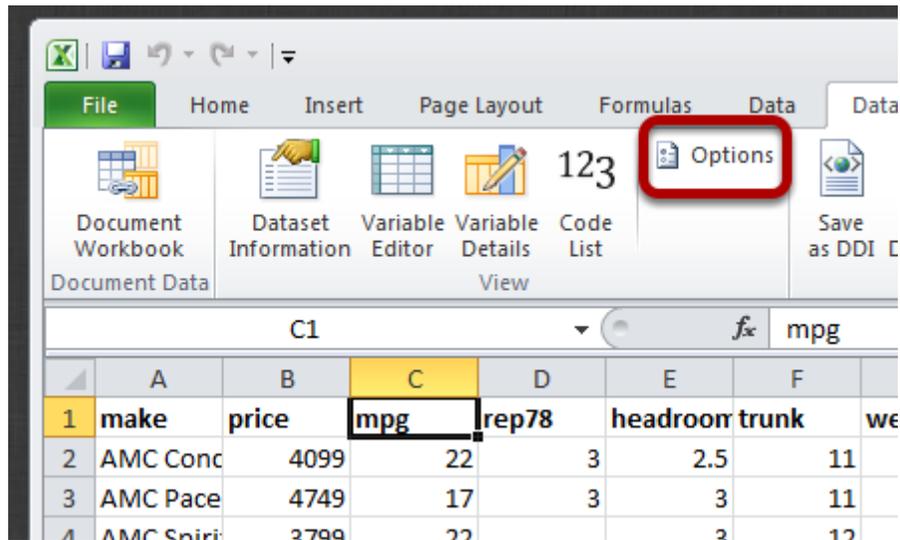
Description

Data Type
Numeric

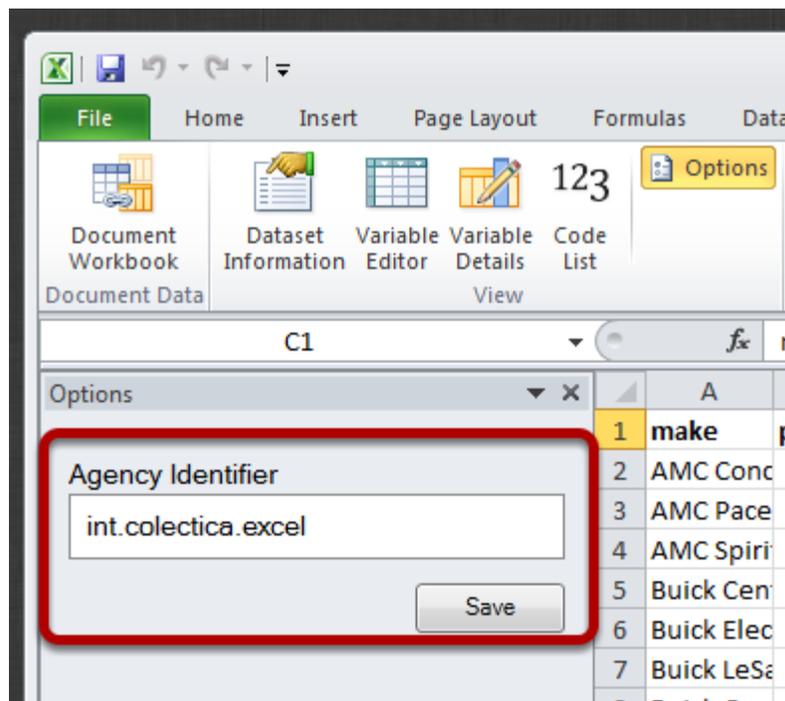
Configuration

Modify the Authoritative Agency of your Metadata

On the Data Documentation ribbon tab, select the Options button



In the Options pane, enter your agency identifier and click Save



If you don't have an official DDI agency identifier, you can get one at the [DDI Agency Registry](#).