



# User Guide

**Any problems please contact WISERD**

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# 1. Getting Started

## 1.1 Accessing the WISERD Dataportal



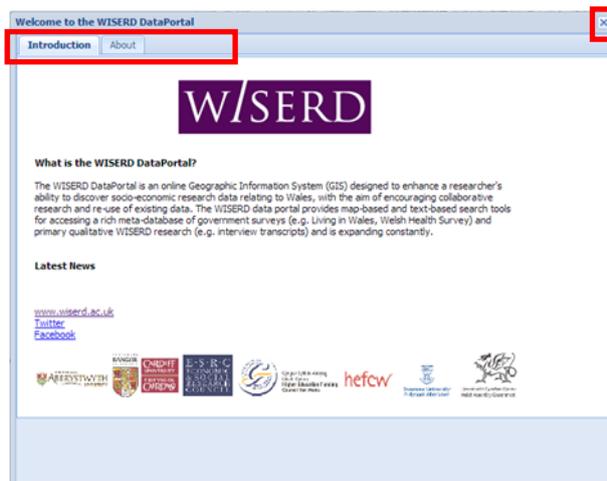
1) To access the WISERD Dataportal type **data.wiserd.ac.uk/dataportal** into a web browser. **Note:** the WISERD Dataportal is not compatible in Internet Explorer 8 or lower

## 1.2 Logging In / Registering



2) When the Dataportal has loaded enter your login details into the relevant boxes and click **Logon**. If you are a new user, click on the **Register** button to create a user account and fill in the user registration boxes.

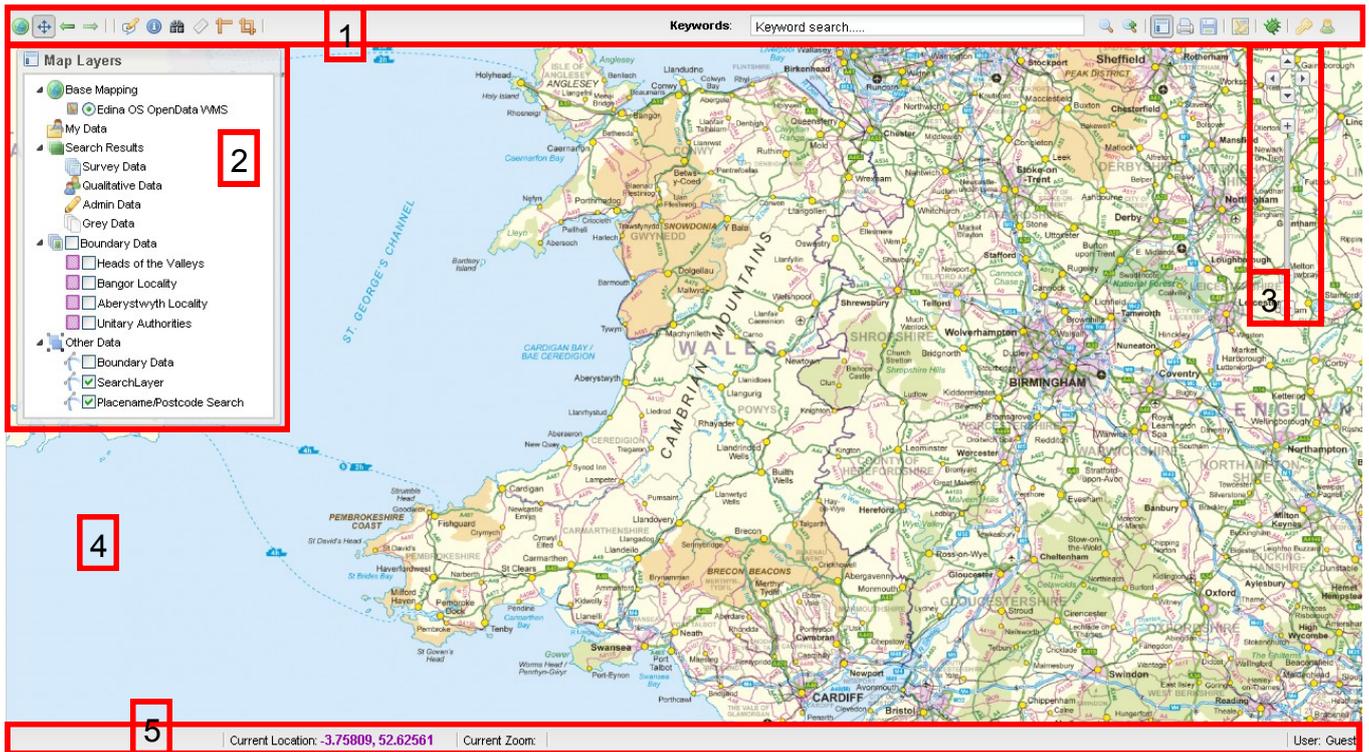
## 1.3 Splash Screen



3) Logging in successfully will open the Dataportal's Splash Screen. Tabs at the top can be used to access more information about the Dataportal and WISERD in general.

4) Click the **X** in the top right-hand corner of the splash screen to close it.

# 1.4 WISERD Dataportal Interface



Logging in will load the Dataportal's main interface. This is the interface which will be used to access the majority of the Dataportal's functions. Each section of the interface is explained in more detail below and on the following pages.

- 1) **Top Toolbar** - This toolbar contains the main functions of the Dataportal, including the Spatial Search Tools, Text Search Tools and Account Management Tools. It is explained in more detail in section 1.5
- 2) **Table of Contents** - This displays search results and map layers. The window can be used to turn map layers on and off and select different search results. The Table of Contents can be turned off using the **Show TOC** tool found in the top toolbar.
- 3) **Navigation Tools** - The navigation tools and zoom slider can be used to navigate around the base map. Navigation may also be achieved by dragging the mouse over the base map and using the mouse wheel.
- 4) **Main Window** - The base map, and any search result layers, are displayed here.
- 5) **Base Toolbar** - This shows the current view settings, including the grid coordinates of the mouse as it moves around the base map, the zoom level, and the username of the user currently logged into the Dataportal.

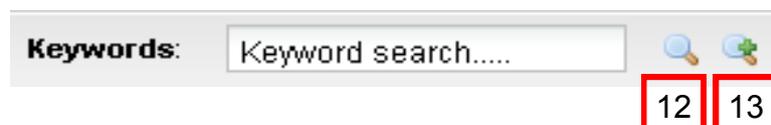
## 1.5 Top Toolbar

### 1.5.1 Spatial Search Tools



- 1) **Zoom to Map Extent** – Zooms out to the full extent of the base map. The full extent of the base map is currently limited to the United Kingdom.
- 2) **Navigate** – The Dataportal uses dynamic ‘slippy’ maps, allowing the user to navigate by left clicking and dragging the mouse in the direction they wish to go.
- 3) **Previous View** – Returns to the map extent being viewed before the current view.
- 4) **Next View** – Moves forward to the map extent being viewed before current view (this is only relevant if the previous view function has been used).
- 5) **Annotate this Map** – allows notes to be typed directly onto the base map. Once selected, click the point on the base map to add annotation. Fill in the relevant boxes on the annotation window which follows.
- 6) **Identify Features** – This tool can be used to find out more information about the features of any layers (such as search results) which have been added to the map. Once selected, left click on the individual features to find out more information about them.
- 7) **Search** – Offers a range of tools for conducting Spatial Searches within the Dataportal.
- 8) **Clear Map Graphics** – Remove any annotations or measurements which have been added to the map.
- 9) **Measure Length** – This tool can be used to measure user defined lengths on the base map.
- 10) **Measure Area** – This tool can be used to measure user defined areas on the base map.
- 11) **Help & User Guide** - Use this to access the Dataportal user guide and help pages.

### 1.5.2 Keyword Search Tools



- 12) **Keyword Search** – Allows the user to search the WISERD Metadata database on keywords.
- 13) **Advanced Search** – Gives the user access to the advanced search options for searching the database on keywords.

### 1.5.3 Account Tools



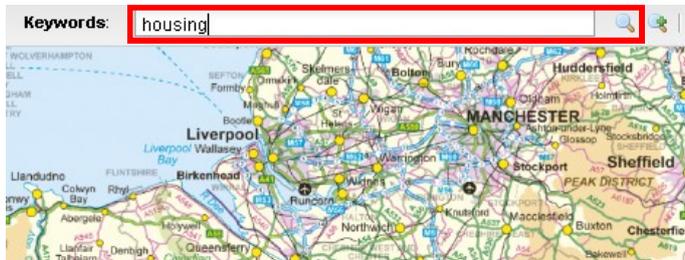
- 14) **Show TOC** – Clicking this will either show or hide the Table of Contents.
- 15) **Print Current View** – Allows the user to print the current map view. This function has been disabled and is currently under development.
- 16) **Save View** – Allows the user to save the current map view. This function has been disabled and is currently under development.
- 17) **Map Settings** – Allows the user to alter the settings of the base map. This function is disabled and is currently under development.
- 18) **Report and Issue...** – Allows the user to report any bugs which they find with the WISERD Dataportal. Once clicked, a bug reporting window will appear. Fill in the fields and click **Submit** to send in a bug report.
- 19) **Login** – Allows users to login to the WISERD Dataportal.
- 20) **My Account** – Allows a user to manage their own account. This function is still under development and some functions have been disabled.

## **2. Functionality**

## 2.1 Search on Keywords

The metadata held within the Dataportal can be searched for based on **keywords**. The keywords search function searches all aspects of the metadata for the keyword or words entered into the search box. Results are displayed and a user can find out more details about each result and add it as a map layer.

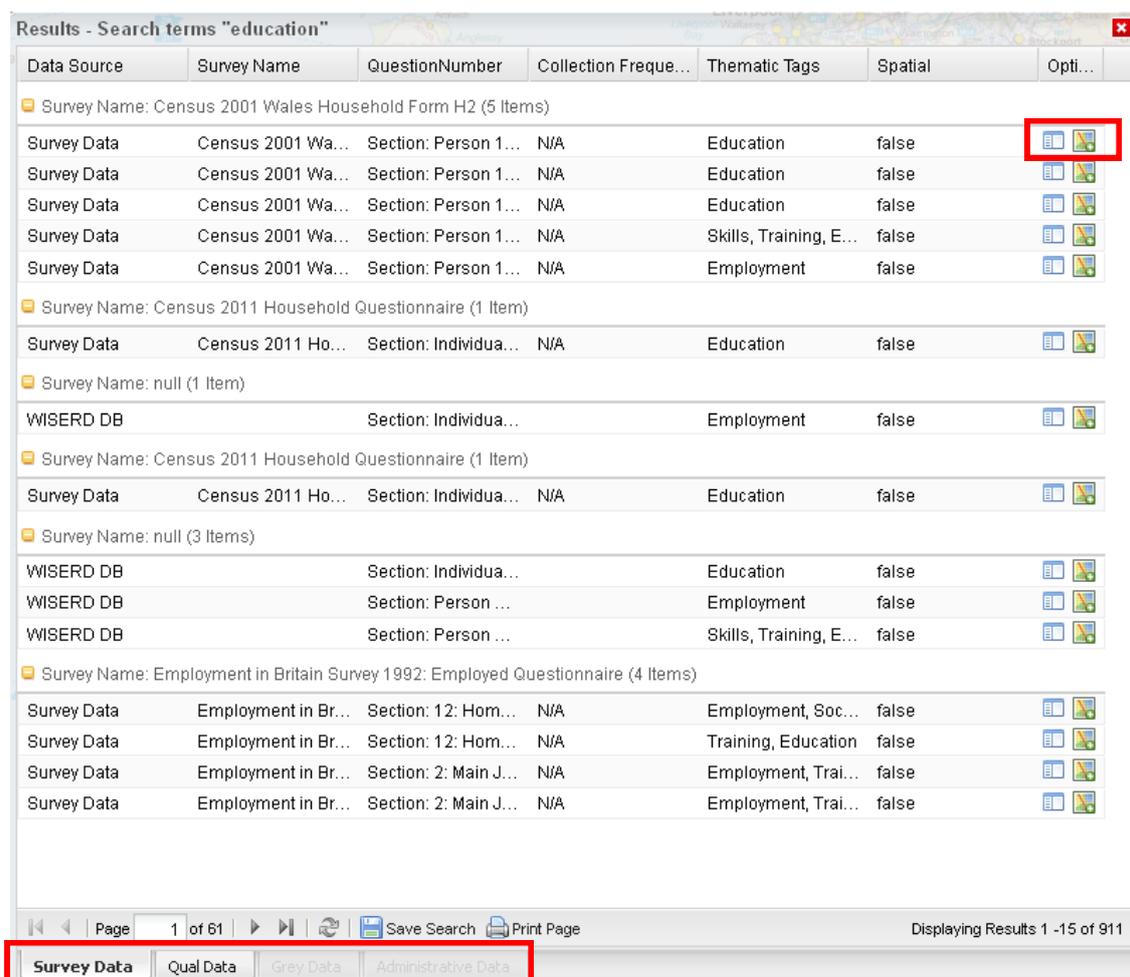
### 2.1.1 Performing a Keyword Search



- 1) To perform a keyword search load the WISERD Dataportal main interface.
- 2) Enter a search term into the **Keywords** text box on the top toolbar and click **Search** to begin the search.

- 3) Once the search has completed the **Keyword Results Window** will open displaying the search results.

### 2.1.2 Keyword Search Results window



Data Source	Survey Name	QuestionNumber	Collection Freque...	Thematic Tags	Spatial	Opti...
Survey Name: Census 2001 Wales Household Form H2 (5 Items)						
Survey Data	Census 2001 Wa...	Section: Person 1...	N/A	Education	false	
Survey Data	Census 2001 Wa...	Section: Person 1...	N/A	Education	false	
Survey Data	Census 2001 Wa...	Section: Person 1...	N/A	Education	false	
Survey Data	Census 2001 Wa...	Section: Person 1...	N/A	Skills, Training, E...	false	
Survey Data	Census 2001 Wa...	Section: Person 1...	N/A	Employment	false	
Survey Name: Census 2011 Household Questionnaire (1 Item)						
Survey Data	Census 2011 Ho...	Section: Individua...	N/A	Education	false	
Survey Name: null (1 Item)						
WISERD DB		Section: Individua...		Employment	false	
Survey Name: Census 2011 Household Questionnaire (1 Item)						
Survey Data	Census 2011 Ho...	Section: Individua...	N/A	Education	false	
Survey Name: null (3 Items)						
WISERD DB		Section: Individua...		Education	false	
WISERD DB		Section: Person ...		Employment	false	
WISERD DB		Section: Person ...		Skills, Training, E...	false	
Survey Name: Employment in Britain Survey 1992: Employed Questionnaire (4 Items)						
Survey Data	Employment in Br...	Section: 12: Hom...	N/A	Employment, Soc...	false	
Survey Data	Employment in Br...	Section: 12: Hom...	N/A	Training, Education	false	
Survey Data	Employment in Br...	Section: 2: Main J...	N/A	Employment, Trai...	false	
Survey Data	Employment in Br...	Section: 2: Main J...	N/A	Employment, Trai...	false	

Page 1 of 61 | Save Search | Print Page | Displaying Results 1 -15 of 911

Survey Data | Qual Data | Grey Data | Administrative Data

- 4) The **Keyword Search Results** window displays a brief summary about each search result.
- 5) Survey Data, Qualitative Data, Administrative Data and Grey Data can be accessed using the tabs at the bottom of the window. Grey Data and Administrative Data have been disabled for this version of the Dataportal.

Survey Name	QuestionNumber	Collection Frequency	The
Wales 2004 Household	Sort Ascending		
Living in Wales 2004 H	Sort Descending	Annual	Hou
Wales 2006 Household	Columns	<input checked="" type="checkbox"/> Data Source	
Living in Wales 2006 H	Group By This Field	<input checked="" type="checkbox"/> Survey Name	
ms)	<input checked="" type="checkbox"/> Show in Groups	<input checked="" type="checkbox"/> QuestionNumber	

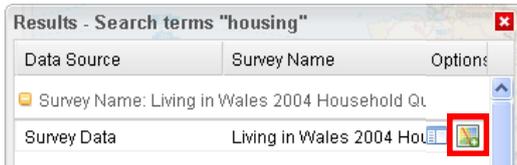
6) Results are displayed in groups. Hovering over the top toolbar and clicking the dropdown arrow allows the user to change the way in which the results are displayed.

- 7) The full metadata record for each result can be accessed using the **View Detailed Metadata** icon under the **Options** field. This is covered in more detail in section 3
- 8) Each result can be added as a map layer using the **Map Metadata** icon under the **Options** field. This is covered in more detail in section 2.2

## 2.2 Mapping Keyword Search Metadata

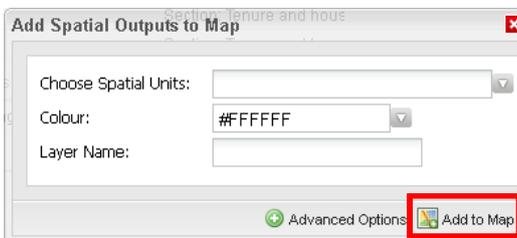
Metadata retrieved by keyword search can be added as layers to the base map. It is advisable to look at the detailed metadata record for a result to ensure that it is fit for purpose before adding it to a map. The way that these layers are displayed will depend on the type of data. The process of mapping Survey and Qualitative metadata from the keyword search window is explained in section 2.2.1 and section 2.2.2 respectively.

### 2.2.1 Survey Metadata

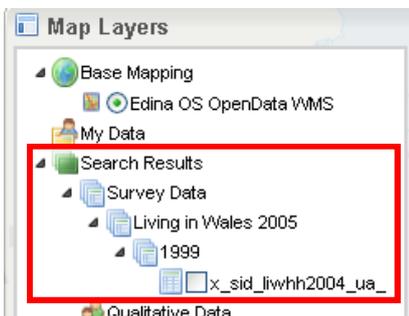


- 1) Perform a Keyword search on a chosen search term to open the **Keyword Search Results** window.
- 2) Navigate to the Survey Data results by clicking the **Survey** tab at the bottom of the window.

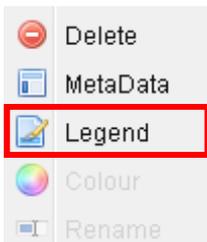
- 3) Select an appropriate result, check the **Spatial** field to ensure that spatial data exists for that result, and use the **Map Metadata** icon under the **Options** field to display the mapping window for this result.



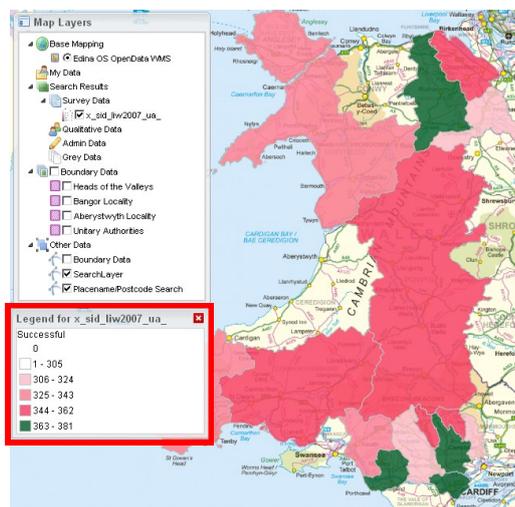
- 4) Use the drop down menus to select appropriate geographic units and set the colour the layer should display as. A meaningful name for the layer can also be input.
- 5) Click **Add to Map** to add the layer to the base map.



- 6) The new layer will be added to the **Table of Contents**. Click on the layer name to expand it.
- 7) Check the check box to display the layer on the map.



- 8) The layer, by default, shows the number of successful responses to a survey. To view a legend showing what each colour means right click on the layer name and click **Legend**.
- 9) The layer may be turned off by un-checking the checkbox.



## 2.2.2 Qualitative Metadata

ID	Title	Opti...
Thematic Group: Economic Dev & Regeneration (1 Item)		
WISID_634...	BWT2ECONEM110210	 

1) Perform a Keyword search on a chosen search term to open the **Keyword Search Results** window.

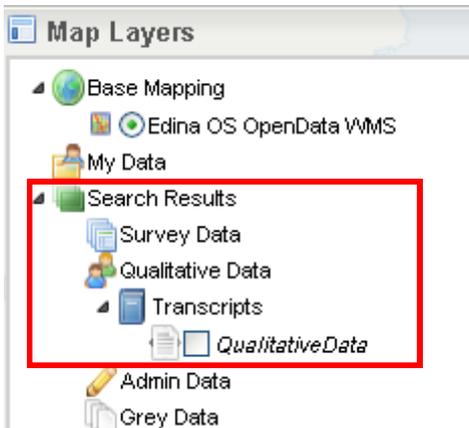
- 2) Navigate to the Qualitative Data results by clicking the **Qual** tab at the bottom of the window.
- 3) Select an appropriate result and use the **Map Metadata** icon under the **Options** field to display the mapping window for this result.

Add Data to Map

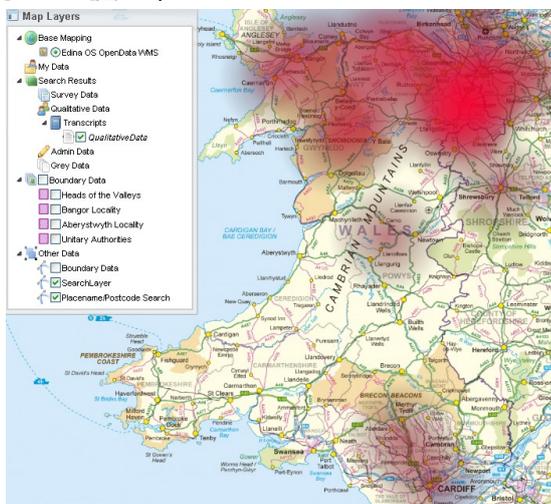
Shape Colour:

LayerName:

- 4) Choose a colour from the dropdown list and enter a layer name.
- 5) Use the **Add to Map** button to add the data to the map.

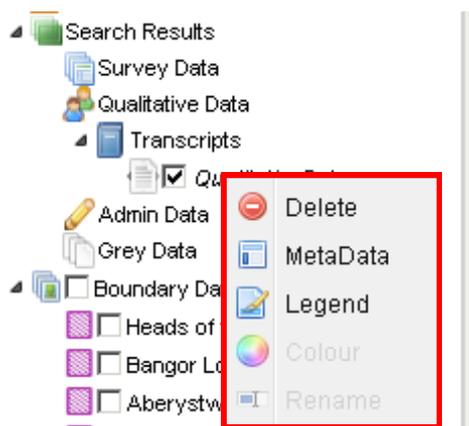


6) A new layer will be created within the Table of Contents. Check the checkbox in this layer to view it on the map.



7) A heat map will be generated showing the geographic areas mentioned within the qualitative data. Darker areas on the map indicate more mentions. This layer can be turned off by unchecking the checkbox.

## 2.3 Altering a Map Layer

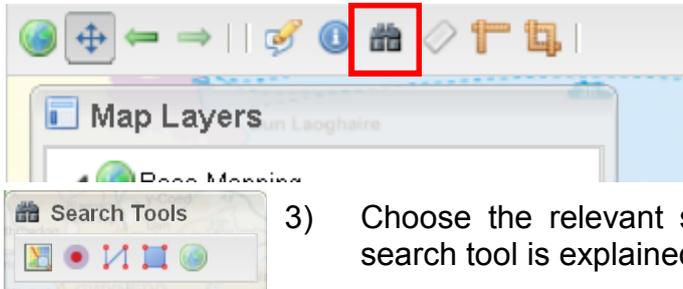


- 1) Once a search result has been added to the map it will be added to the **Table of Contents**. To alter a layer, **right click** it.
- 2) This will bring up a menu allowing the layer to be recoloured, renamed or deleted. The full metadata and a legend for this layer can also be accessed here.

## 2.4 Spatial Search

The metadata held within the Dataportal can be queried spatially. The spatial search allows the user to find data relating to a specific place, defined as a place name or as an area on the map. Each result can be added as a map layer. A range of different spatial search functions are available, as described in section 2.5.

### 2.4.1 Performing a Spatial Search

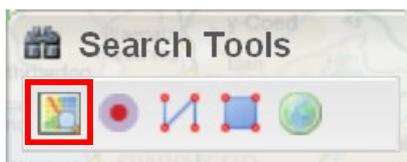


- 1) To perform a spatial search load the WISERD Dataportal main interface.
- 2) Use the **Binoculars** button to open the **Spatial Search Tools**.

- 3) Choose the relevant search tool and perform the search. Each search tool is explained in detail in section 2.5.

## 2.5 Spatial Search Tools

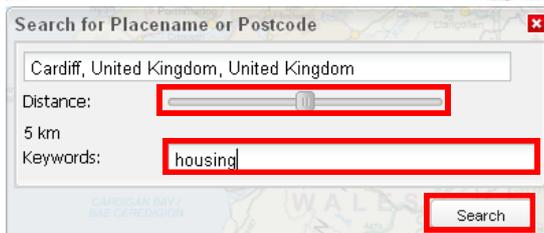
### 2.5.1 Search by Location



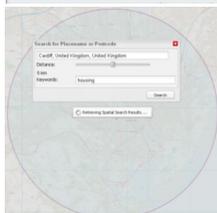
- 1) To Search by Location open the **Spatial Search Tools** menu and click on **Search by Location** to open the Search by Location menu.



- 2) Enter a place name or a postcode into the first lookup field and select the correct place from the dropdown list.

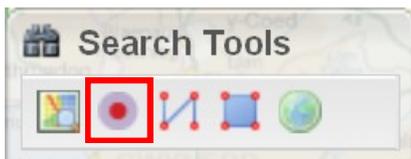


- 3) The search will treat the selected place name as a point on the map. Use the **slider** to set a distance buffer around this point. This will define the search area.
- 4) A search may be refined by entering keywords into the search field.



- 5) Once the search settings have been defined use **Search** to perform the search. A buffer will be drawn around the chosen place name, and, once the search is complete, a **Spatial Search Results** window will open. This window is explained in more detail in section 2.6.

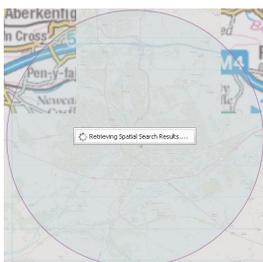
## 2.5.2 Search by Buffer



- 1) To Search by Buffer open the **Spatial Search Tools** menu and click **Search by Buffer**.
- 2) Once this tool is highlighted click on the base map to define the point around which a search should be performed.

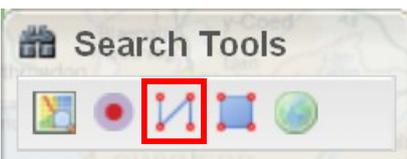


- 3) Use the **slider** to set a distance buffer around this point. This will define the search area.

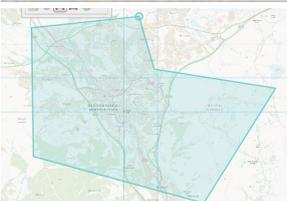


- 4) Once the search settings have been defined use **Search** to perform the search. A buffer will be drawn around the chosen point, and, once the search is complete, a **Spatial Search Results** window will open. This window is explained in more detail in section 2.6.

## 2.5.3 Search by Irregular Polygon



- 1) To Search by Irregular Polygon open the **Spatial Search Tools** menu and click **Search by Irregular Polygon**.



- 2) Once this tool is highlighted click on the base map to define the area within which a search should be performed.



- 3) **Double click** the final point to finish the polygon and start the search. Once the search is complete, a **Spatial Search Results** window will open. This window is explained in more detail in section 2.6.

## 2.5.4 Search by Regular Polygon



- 1) To Search by Regular Polygon open the **Spatial Search Tools** menu and click **Search by Regular Polygon**.



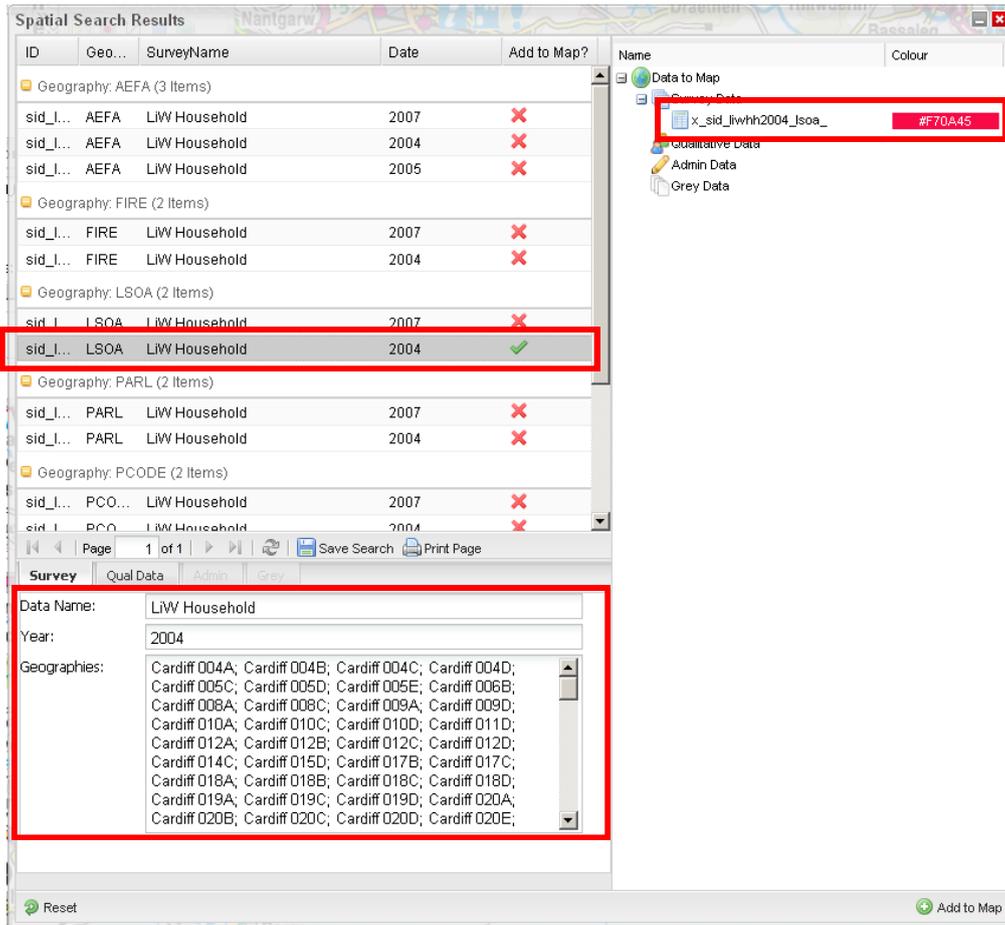
- 2) Once this tool is highlighted **click and drag** the mouse across the base map to define a box within which a search should be performed.
- 3) Once the box has been defined let go of the mouse button to start the search. Once the search is complete, a **Spatial Search Results** window will open. This window is explained in more detail in section 2.6.

## 2.5.6 Removing Search Areas from the map

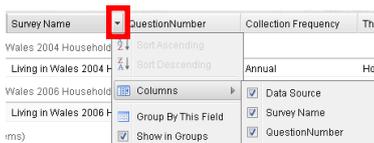


- 1) Search areas can be removed from the map using the **Eraser** tool on the **Top Toolbar** of the Dataportal's main interface.

## 2.6 Spatial Search Results Window

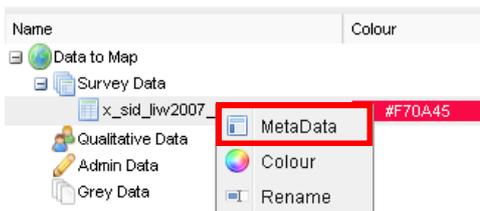


- 1) The **Spatial Search Results** window displays a brief summary about each search result.
- 2) Survey Data, Qualitative Data, Administrative Data and Grey Data can be accessed using the tabs at the bottom of the window. Grey Data and Administrative Data have been disabled for the beta version of the Dataportal.



- 3) Results are displayed in groups. Hovering over the top toolbar and clicking the dropdown arrow allows the user to change the way in which the results are displayed.

- 4) Selecting a result in the main window displays geographic information about this result in the pane below. This includes the geographic units available for this result within the search area specified.
- 3) Detailed metadata records can be accessed for each result. Click the **Red Cross** under the **Add to Map?** field. The result will load into the **Mapping Pane** on the right.



- 4) Once added to the Mapping Pane, **right click** on the result and select **Metadata**. Search result metadata is covered in more detail in section 3.

## 2.7 Mapping Spatial Search Metadata

Metadata retrieved by the spatial search can be added as layers to the base map. It is advisable to look at the detailed metadata record for a search result to ensure that it is fit for purpose before adding it to a map. The way that these layers are displayed will depend on the type of data. The process of mapping Survey and Qualitative Data metadata from the spatial search window is explained in section 2.7.1 and section 2.7.2 respectively.

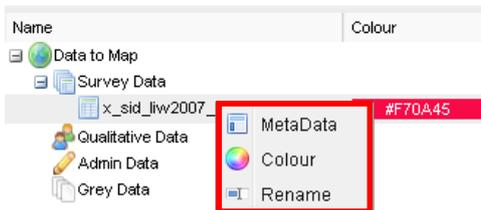
### 2.7.1 Survey Metadata

ID	Geo...	SurveyName	Date	Add to Map?
Geography: LSOA (2 Items)				
sid_1...	LSOA	LIW Household	2007	<input type="checkbox"/>
sid_1...	LSOA	LIW Household	2004	<input checked="" type="checkbox"/>

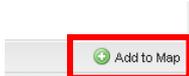
1) Perform a Spatial Search to open the **Spatial Search Results** window.

2) Navigate to the Survey Data results by clicking the **Survey tab** at the bottom of the window.

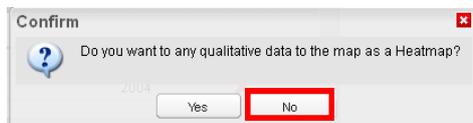
3) Each result can be mapped as a layer. Click the **Red Cross** under the **Add to Map?** field. The result will load into the **Mapping Pane** on the right.



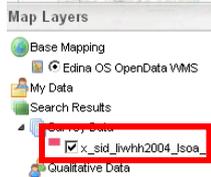
4) Once added to the Mapping Pane, **right click** on the result to alter the layer properties. The layer may be recoloured and renamed.



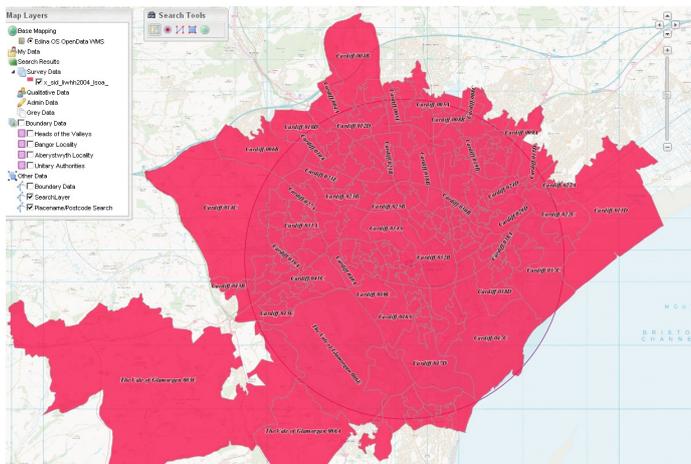
6) Once the desired layer properties have been generated the layer may be added to the map using the **Add to Map** button.



7) A message box will appear regarding heatmaps. This is only relevant if plotting qualitative metadata, click **No** to this statement.



8) Layers added to the map will load into the **Table of Contents**. Navigate to the correct result and **check** the checkbox to turn the layer on.



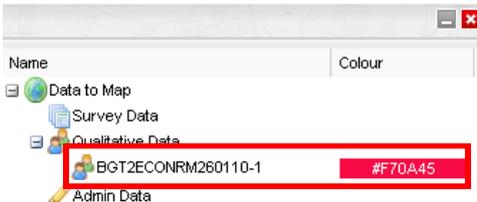
9) Survey data layers added to the map using the spatial search function only contain geographic units from within the chosen search area.

Current Location: **-5.05975, 52.56351** | Current Zoom: **2** **Spatial Search Results**

9) After adding a layer to the base map the Spatial Search Results window will minimise to the bottom toolbar. Clicking **Spatial Search Results** will restore it.

## 2.7.2 Qualitative Metadata

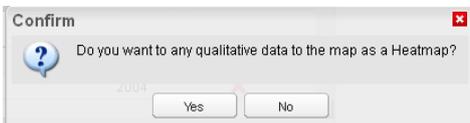
- | ID                                 | Title                     | Add...                              |
|------------------------------------|---------------------------|-------------------------------------|
| Thematic Group: Economic Dev & Reg |                           |                                     |
| WISID...                           | BGT2ECONRM260110-1        | <input checked="" type="checkbox"/> |
| WISID...                           | T2 H SEWalesEcReg KM22... | <input type="checkbox"/>            |
- 1) Perform a Spatial Search to open the **Spatial Search Results** window.
  - 2) Navigate to the Qualitative Data results by clicking the **Qual** tab at the bottom of the window.
  - 3) Each result can be mapped as a layer. Click the **Red Cross** under the **Add to Map?** field. The result will load into the **Mapping Pane** on the right.



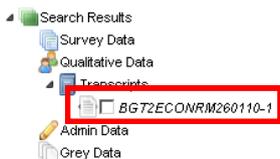
- 4) Once added to the mapping pane, **right click** on the result to alter the layer properties. The layer may be recoloured and renamed.



- 6) Once the desired layer properties have been generated the layer may be added to the map using the **Add to Map** button.



- 7) A message box will appear regarding heatmaps. **Qualitative data** can be plotted as **heat maps** or as **proportional symbols**. Click Yes to plot the layer as a heat map and No to plot it as proportional symbols.



- 8) Layers added to the map will load into the **Table of Contents**. Navigate to the correct result and **check** the checkbox to turn on the layer.



Qualitative results represented by a heatmap.



Qualitative search results represented by proportional symbols

Current Location: **-5.05975, 52.56351** | Current Zoom: **2** **Spatial Search Results**

- 9) After adding a layer to the base map the Spatial Search Results window will minimise to the bottom toolbar. Clicking it will restore it.

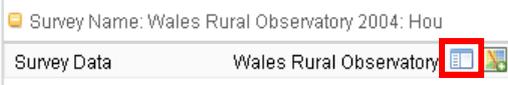
# **3. Discovering Metadata**

## 3.1 Metadata Within the Dataportal

The WISERD Dataportal offers access to a range of different types of metadata. Each metadata record is designed to give the user a feel for the dataset to which it refers. If a user decides that the dataset sounds interesting, the metadata records can be used to find out where they would obtain the data itself. Types of metadata held by the Dataportal include Survey Data, Qualitative Data, Administration Data and Grey Data. Using the Dataportal to gain access to each of these datasets is discussed in more detail in the following sections.

## 3.2 Survey Metadata

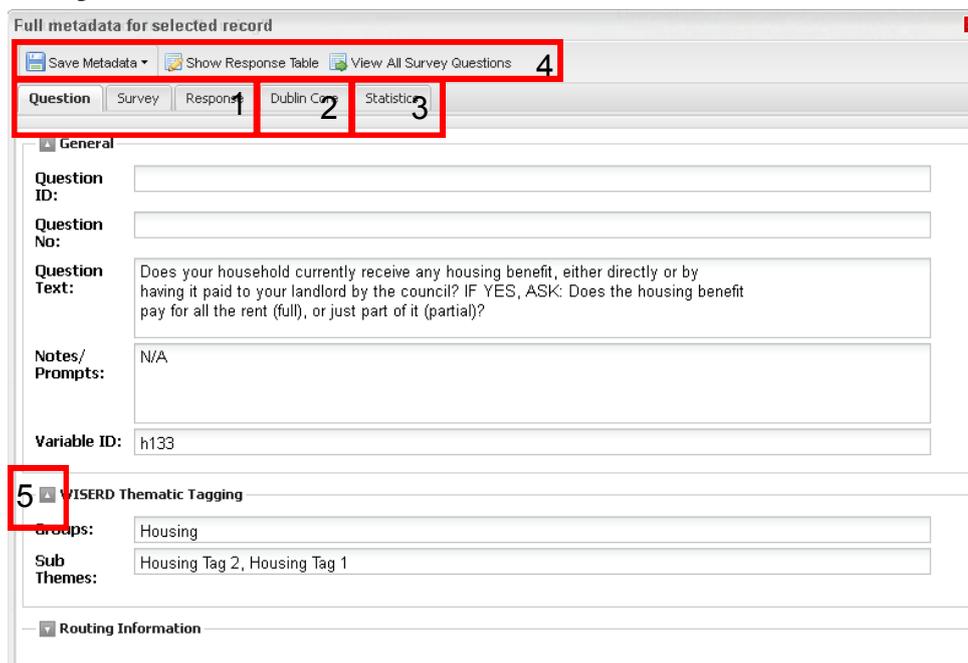
- 1) To obtain survey metadata within the WISERD Dataportal perform a Keyword (section 2.1) or Spatial (section 2.4) search.



- 2) Navigate to the **Survey tab** at the bottom of the results window to view search results for survey data.

- 3) Click the **View Detailed Metadata** icon from the **Options** field next to a chosen result.
- 4) This will open the **Survey Metadata** window for the selected record. Data held for this record is split into 5 sections, Questions, Survey, Response, Dublin Core and Statistics. The window is explained in more detail below.

### 3.2.1 Survey Metadata Window



- 1) **Question, Survey and Response Tabs** - These offer more detailed information from the survey documentation about the chosen result.
- 2) **Dublin Core Tab** - This offers information about the creation of the metadata record itself.
- 3) **Statistics Tab** - This allows the user to view the response statistics for the chosen search result by geographic area. A user will be able to see whether the sample size for that result is large enough for analysis within their geographic area of interest.
- 4) **Full Metadata Toolbar** - Using the functions on this toolbar a user can **View All the Survey Questions** from their selected survey, **Show Response Table**, allowing them to view the raw response data for the search result, and to **Save Metadata** as a PDF or to their personal account. **Note:** The ability to save your results has been disabled for the Beta version of the WISERD Dataportal.
- 5) **Grouped Information** - Information on each tab is split into groups. **Grey Arrows** next to each group can be used to expand or contract the information for that group.

### 3.2.2 Survey Response Data

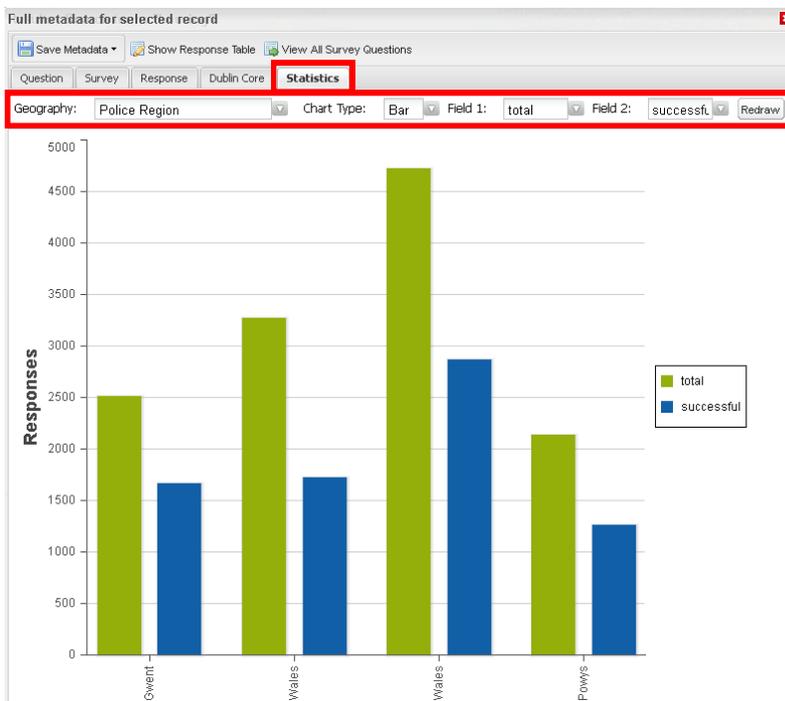


- 1) To show the raw response data for a search result select **Show Response Table** from the **Full Metadata** window for the desired record.
- 2) Select the appropriate geographic units from the **Unit** dropdown menu.
- 3) Use the **Get Response Table** button to generate a table containing the survey response data.

Name	Total	Successful	Refused	No Contact	Ineligible	Other	Response	Adjusted R
Blaenau Gwent	543			46	45	12	60	NA
Bridgend	523			50	30	11	57.7	NA
Caerphilly	520			36	26	11	72.3	NA
Cardiff	1106			107	88	25	61.9	NA
Carmarthenshire	592	119		60	66	17	55.7	NA
Ceredigion	523	99		35	78	20	55.6	NA
Conwy	629	155		67	72	28	48.8	NA
Denbighshire	518	133		41	55	11	53.7	NA

- 4) The response data table shows a range of data relating to survey containing the chosen result. This is available for each of the chosen geographic units.
- 5) Data can be sorted and columns can be turned on and off by clicking on the column header.

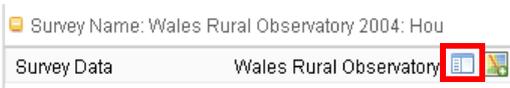
### 3.2.3 Survey Response Statistics



- 1) The data shown in the table in section 3.2.2 can also be plotted on graphs within the Dataportal using the **Statistics Tab** on the **Full Metadata** window for the desired record.
- 2) Select the appropriate Geographic Units, Chart Type, and data using dropdown boxes.
- 3) Use the **Redraw** button to redraw the chart using the chosen settings.

## 3.3 Qualitative Metadata

- 1) To obtain qualitative metadata within the WISERD Dataportal perform a Keyword (section 2.1) or Spatial (section 2.4) search.



- 2) Navigate to the **Qual tab** at the bottom of the results window to view search results for qualitative data.

- 3) Click the **View Detailed Metadata** icon from the **Options** field next to a chosen result.
- 4) This will open the **Qualitative Metadata** window for your selected record. Data held for this record is split into 3 sections, Dublin Core, Tags and Statistics. The window is explained in more detail below.

### 3.3.1 Qualitative Metadata Window

MetaData for :WISID\_634574772266482500

Dublin Core | Tags | Stats

1 | 2 | 3

**WISERD ID:** WISID\_634574772266482500

**Title:** BWT1ECONAP26.11.09

**Subject:** WISERD Stakeholder Interview

**Description:** Tier 1 of the WISERD Stakeholder Interview for Economic Development and Regeneration for the North Wales locality

**Date:** 26/11/2009

**Type:** Text **Format:** Word document, 111KB

**Creator:** Wales Institute of Social Economic Research, Data and Methods (WISERD)

**Publisher:** Wales Institute of Social Economic Research, Data and Methods (WISERD)

**Contributor:** Chief Economic Development Officer, Wrexham County Borough Council

**Source:** Interview conducted by Alex Plows

**Rights:** Wales Institute of Social Economic Research, Data and Methods (WISERD)

**Coverage:** Wrexham - Wrexham;Wrexham/Wrexham;Wrexham Industrial Estate;North Wales;City and County of Cardiff;Wales;Rhyl;Cheshire West and Chester (B);Sir y Flint - Flintshire;South Wales;England;United Kingdom of Great Britain and Northern Ireland;St Asaph/Llanelwy;Europe;West Midlands;Bangor;City and

Survey Data | **Qual Data** | Grey Data | Administrative Data

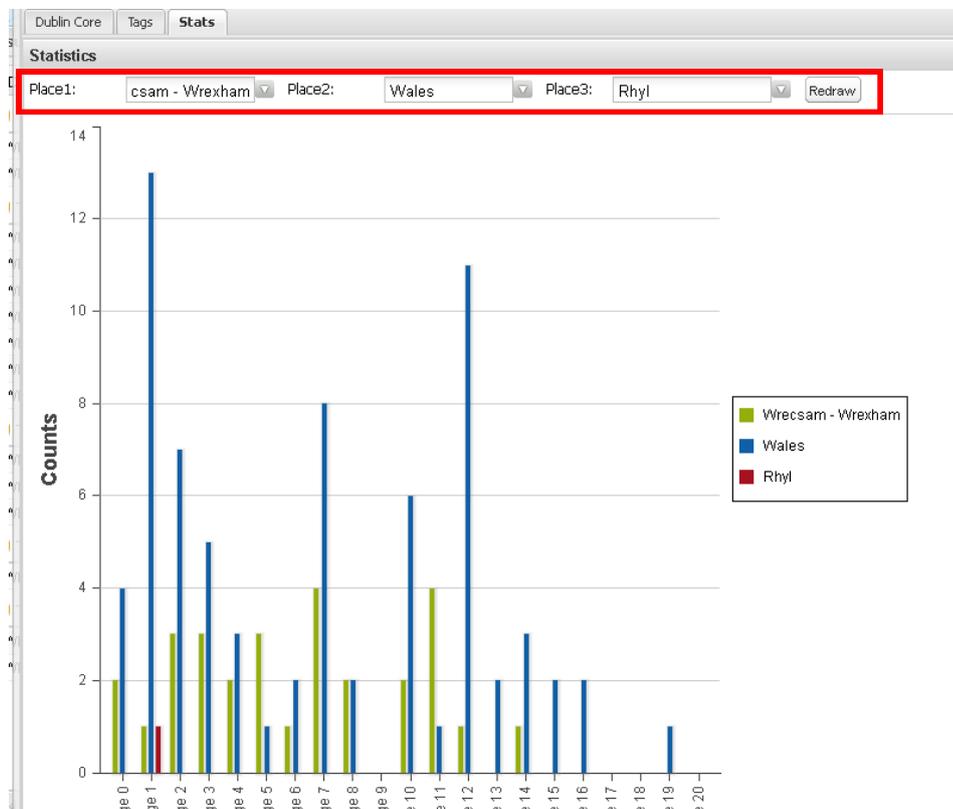
- 1) **Dublin Core Tab** - Offers detailed information about the Qualitative data record.
- 2) **Tags Tab** - Offers a **Tag Cloud** of keywords. This will give the user a good idea of the content of the qualitative data record.
- 3) **Stats Tab** - Offers statistics relating to the number of times a Geographic area has been referenced within the qualitative data, and where these references occur. This will allow the user to determine whether the geographic area they are interested in is mentioned within the transcript and how frequently it is mentioned.

### 3.3.2 Qualitative Metadata Tags



The Tag Cloud shows a list of keywords contained within the qualitative data record, giving the user a better idea of its theme. The larger and darker a phrase the more often it has been mentioned within the transcript.

### 3.3.3 Qualitative Metadata Statistics



The Stats tab shows the frequency of occurrences of Geographic areas (such as place names) within the qualitative data record. These frequencies will allow a user to ascertain how relevant this data record is to their place of interest. Three Areas can be graphed at once. Selecting different values in the dropdown boxes and clicking **Redraw** will change the areas appearing on the chart.