

# **Manual**

For the use of Metadata Editing Tool

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## 1. ACCESS TO THE PPP TOOLS – GENERAL INFORMATION

Two versions of the PPP database exist.

The acceptance server contains a copy of the PPP database and it is used for testing new versions of the tools and for training: [https://webgate.acceptance.ec.europa.eu/ppp\\_tool/](https://webgate.acceptance.ec.europa.eu/ppp_tool/).

The production server contains the real PPP data: [https://webgate.ec.europa.eu/ppp\\_tool/](https://webgate.ec.europa.eu/ppp_tool/)

Please login with your EU Login<sup>1</sup> user id and password.

After login, select your role *e.g. COUNTRY (country 2-digit code)*. If access to the PPP tools is restricted, contact the Eurostat PPP team [ESTAT-PPP@ec.europa.eu](mailto:ESTAT-PPP@ec.europa.eu) to assign your user to a specific role in the PPP tools.

After login the homepage of the PPP database opens. From here, you have direct access to all PPP tools listed below.

PPP Tools:

- Item List Management Tool (ILMT)
- Price Collection Tool with link to Data Entry Tool (DET)
- Metadata Editing Tool (MET)
- Validation Tool (VT) - includes Survey Archive
- Aggregation Tool (AT) with Aggregation, National Accounts Data, Auxiliary Data Tools

This short manual aims to provide information about the use of the online Metadata Editing Tool. It gives an overview and understanding of the features of MET, instructions that help to draft and provide the survey report.

Eurostat presented a proposal to integrate the compulsory survey reports for consumer goods, equipment goods and construction surveys into the PPP Database and PPP Validation tool, proposal endorsed by the PPP Working Group in 2016 ([Doc. 16/P2/10](#)). Following that proposal, an editing tool was developed. In order to ensure a straightforward and easy to use tool, a set of minimum requirements was established and this gives the main description of the Metadata Editing Tool:

- enter the information in an easy way, similar to other editing tools
- option to use text mark-up (e.g. italic font, formatted lists), tables;
- option to use copy/paste shortcut and other common shortcuts;
- option to attach files;
- restrictions regarding the draft versions of the report (drafts available for the country only);
- option to export different versions of the survey report.

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<sup>1</sup> EU Login is the European Commission's user authentication service. It allows authorised users to access a wide range of Commission web services, using a single email address and password.

## 2. METADATA EDITING TOOL

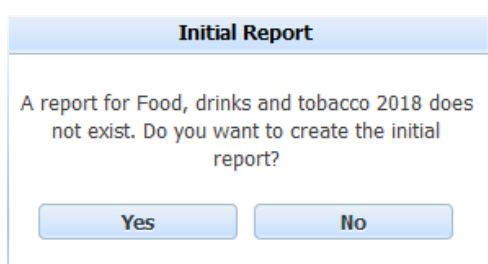
### 2.1. General information

The online **Metadata Editing Tool (MET)** is accessible from the PPP Tools – Homepage. A link to the survey conducted in that period and its report is displayed here.



One click on the survey name will re-direct you to the MET and the survey report.

If the report is created for the first time, the following pop-up window will appear informing about the creation of the initial report.

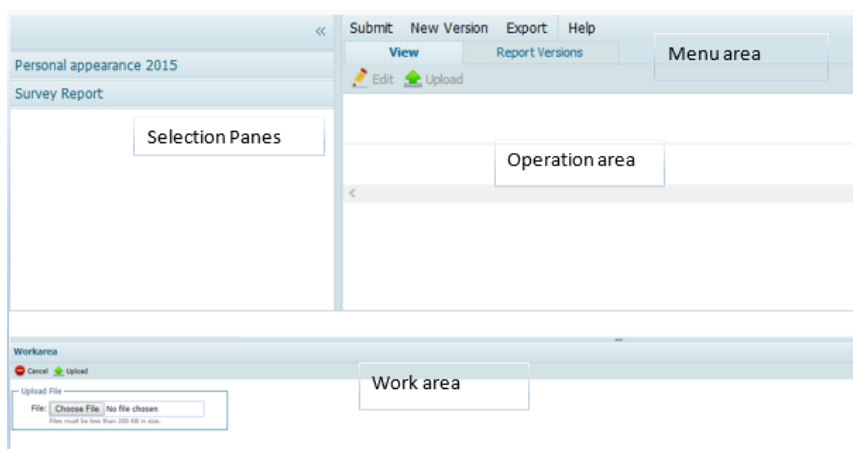


Otherwise, the survey report will open in MET.

In MET, you can navigate through reports of different surveys, if available; navigation is done through the survey-tree (*see section below*).

### 2.2. Explore the tool

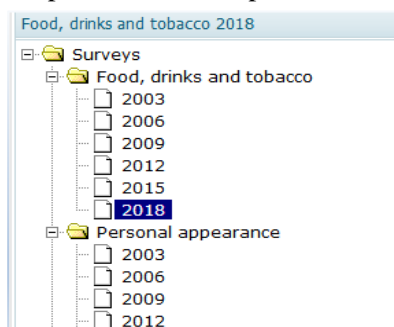
- Selection panes
- Operation area
- Menu area
- Work area



The tool has a structure similar to ILMT and VT, namely the screen is divided in four areas: the menu area on the top, the selection panes on the left side, the operation area where information is displayed according to the selections made and the work area on the bottom.

- **Selection panes**

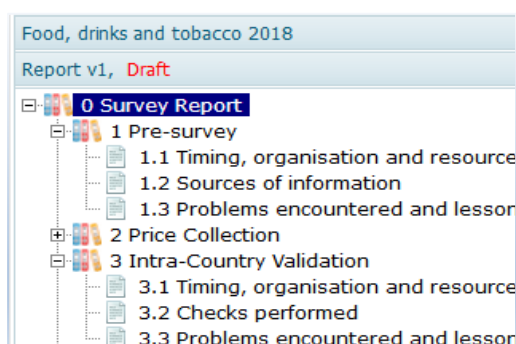
The **selection panes** allow to select any of the surveys and any of the survey years – for this click on the 1<sup>st</sup> panel from the top; and to select any section and subsection of the report - click on the 2<sup>nd</sup> panel.



Click on the  to expand the tree; and on  to collapse the tree.

The name of the sections and subsections of a report are displayed in the *survey-tree* in the left side pane. The following sections<sup>2</sup> are available in a report:

1. Pre-survey
2. Price Collection
3. Intra-Country Validation
4. Inter-Country Validation
5. Specific questions related to the Survey



The section 'Inter-country validation' may be completed once the validation is closed.

- **Operation area**

The **operation area** shows the information according to the selection made in the survey tree or menu. This is also the editing screen and it includes a **rich text editor** (see section 2.3.2).

- **Menu area**

<u>Submit</u>	<u>Edit (View tab)</u>
<u>New version</u>	<u>Upload (View tab)</u>
<u>Export</u>	<u>Save (Edit tab)</u>
<u>Help</u>	<u>Cancel (Edit tab)</u>

The MET **menu** includes operations that allow the user to submit<sup>3</sup> the survey report, to create on request a new version of the report, to export the document as well as a Help that offers information

<sup>2</sup> Standard format for consumer goods surveys

about the MET tool, the user guide and the PPP Manual. Below the main menu, there are two tabs displayed, one showing the report with a sub-menu available, **Edit** and **Upload**, and one showing all the existing versions of the report.

- **Work area**

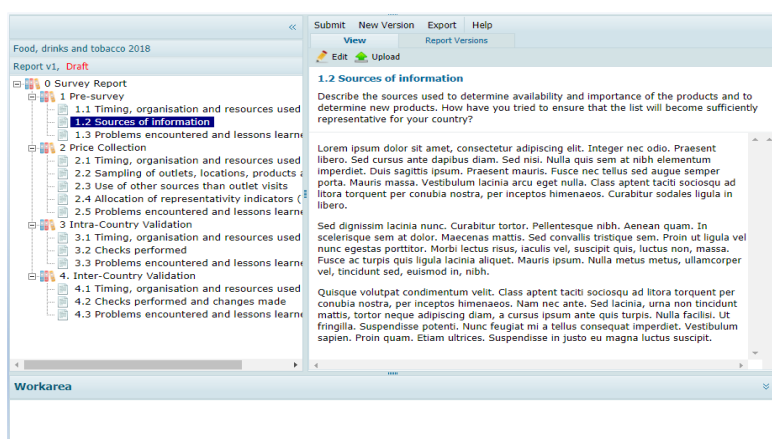
The **work area** is displayed at the bottom and operations like Upload will be managed from here.

## 2.3. TABs: View, Edit, Report Versions



### 2.3.1. View Tab

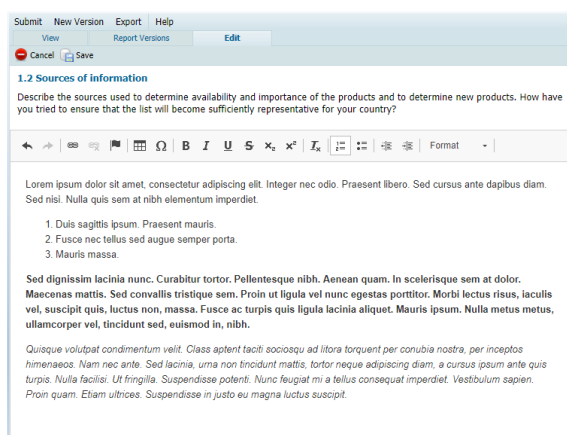
Select one sub-section. Click on the **View** tab and a short description of expected information will be displayed in the upper side of the screen. In the example below the sub-section *1.2 Sources of information* of section *1 Pre-survey* is selected.



A sub-menu is displayed within this tab with two actions: **Edit** and **Upload**.

### 2.3.2. Edit Tab

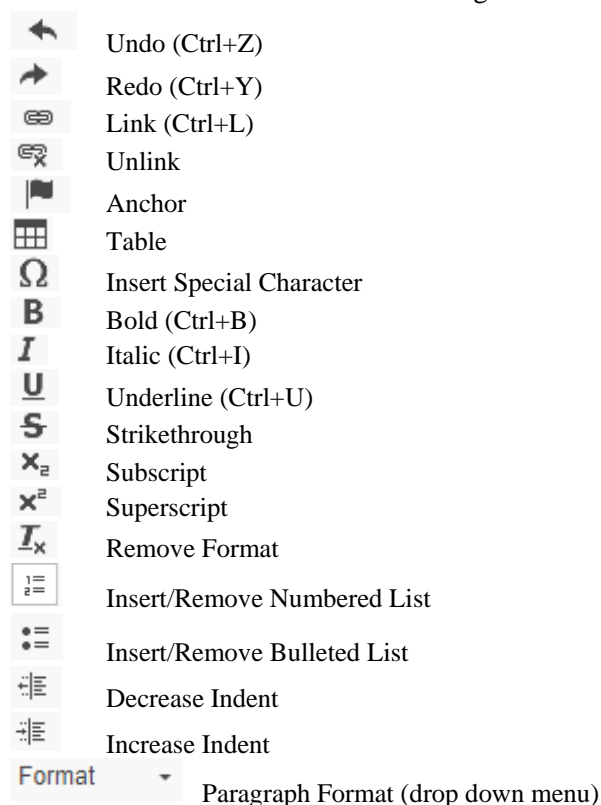
Choose the sub-section (question) from the left panel (*see selection panes in section 2.2*) and press the **Edit** button. The Edit tab appears with the editing screen as well as an editing menu (HTML editor).




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<sup>3</sup> Functionality not yet available as of May 2018

The HTML menu includes the following commands:



Start typing your text in the area under the HTML-menu and use the commands or keyboard shortcuts, when available, to format the text (*see above the list with shortcuts*). No specific instructions are to be followed to encode your text as this is a simple editor, therefore just type the text in the designed area.

If you have to copy an amount of information from another application in a specific sub-section, use the common copy/paste (*Ctrl+C/Ctrl+V*) commands.

Note that the editor allows the use of text mark-up, formatted lists, tables etc.

In the Edit tab, a sub-menu is available with two actions: **Save** and **Cancel**.

Press the **Save** button once you finished editing one question (sub-section). Failing doing this **before you exit the editing area** of a specific sub-section will cause the loss of the information. To avoid this, a pop-up window appears each time you exit the editing area of a section without pressing Save or Cancel. If you wish to save the information and not to lose any unsaved data, choose **No** when confirming the close of the editor and press on the **Save** button.



The **Automatic Save** functionality is active and automatically saves the information every 10 minutes.

Several users can work on a survey report, however, one sub-section can be edited by one user at a time only. Once that user saves (or cancels) the work, hence once the Edit tab closes, another user can start editing that sub-section.

- **Upload**

In the View tab, next to the **Edit** button, the **Upload** button is available. Press on it to upload annexes, if any. Note that the Upload button is not available in the Edit mode but in View only.

The below information is displayed in the Workarea allowing the upload of files less than 200 KB.

Press on **Choose File** to select the file you want to upload. Then press on the **Upload** in the Workarea to finalise this step. To upload more than one file in the same sub-section, repeat the step described above (*multiple selection is not permitted*) or upload an archive (e.g. zip file).

The attachments will be displayed in the operation area but below the editing area.

To download one of the uploaded files, click on . To remove any of the attached files, click on .







### 2.3.3. Report Versions tab

The **Report Versions tab** shows all available versions of your report, both submitted and not submitted, if any.



Note that a report becomes visible to other countries only when submitted in the MET, and only the latest version of the submitted report is visible.

For example, if together with the survey data you are submitting a part of the report (sections 1-3&5), this will be visible to all countries in the VT. When the report will be updated with the missing part (section 4) and the report will be submitted once again, the VT will display the latest updated version only. Hence, in VT, one version per country is available.

### View from MET

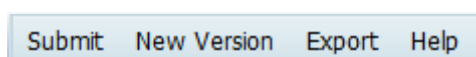
View		Report Versions						
	Version	Status	Creation Date	Created By	Submission Date	Submitted By		
	1	Draft	2018.03.27 13:51	predaal	N/A			
	2	Draft	2018.04.09 10:45	predaal	N/A			

All reports (draft or any submitted versions) are displayed in MET in the report versions for a specific country.

Click on  to export a version of the report. Click on  to delete a version. You may delete any of the draft versions but none of the submitted ones, a message will be displayed when trying this.

Note that all the information is stored in the database. If there are 2 transmitted versions and e.g. 10 drafts that will not be used anymore, please consider their deletion.

## 2.4. Actions in the Main Menu



Four actions are shown in the main menu: Submit, New Version, Export, Help.

- **Submit**

Press on **Submit** to send your report to the Validation Tool. Later on, this action will also send the file to eDamis<sup>4</sup>. However, as this functionality will become available later, country should export the file and send it via eDamis using the standard dataset.

Pressing the submit button, the below pop-up window appears.



Once you press **Yes**, your survey report will be available in Validation Tool next to the price data.

- **New Version**

This function allows you to create a new version of the report.

Once you have submitted a version of the survey report, you cannot edit that version. However a new version which is a copy of the last submitted one can be created.

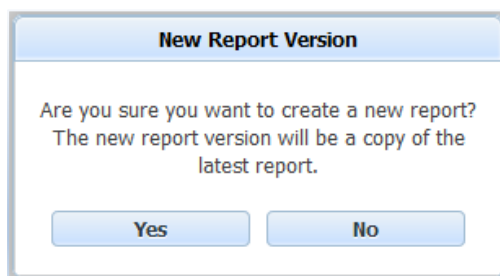
Also, it can be that during your work, you want to create a new draft version of the report even though you have not submitted the existing one.

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<sup>4</sup> Current version of the MET does not support direct transmission to eDamis. Instead, country should export and then send the file to eDamis using the standard dataset.



In both cases, a new draft can be created by pressing the function **New Version** from the main menu. The below pop-up window appears asking you to confirm the creation of a new report which is a copy of the latest existing version.



Note that all the information is stored in the database. If there are 2 transferred versions of the report and e.g. 10 drafts that will not be used anymore, please consider their deletion.

Sending a new version to VT will overwrite the existing published document.

### ***Section 4 Inter-Country Validation***

*To be filled after the validation process as an update of the earlier version of the survey report.*

Use “New version” to open the survey report and to complete the section 4; as indicated in the description, this section is provided after the data validation. Just create a new version, fill in the information and **resubmit** your report.

- ***Export***

Click on Export to obtain the file with your latest report. The output is an html file. Note that html files can be opened with web-browsers as well as with other tools (e.g. Word, Excel).

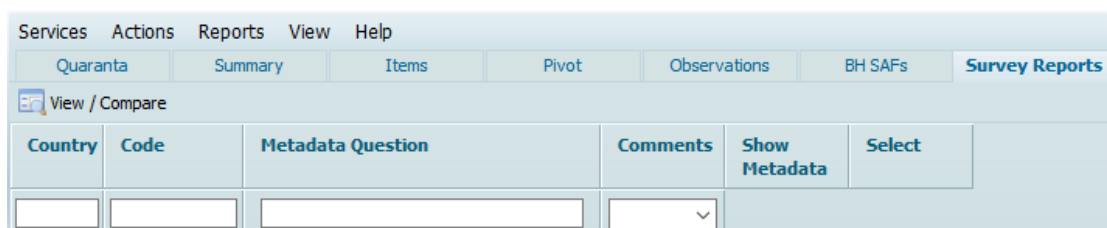
- ***Help***

Here you find information about the version number of MET, a link to the user guide and to the PPP manual.

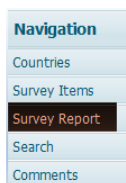
## **3. SURVEY REPORTS IN THE VALIDATION TOOL**

Survey reports for each country will be available in the Validation Tool once they are submitted and each user will be able to see the latest submitted report of each of the other country.

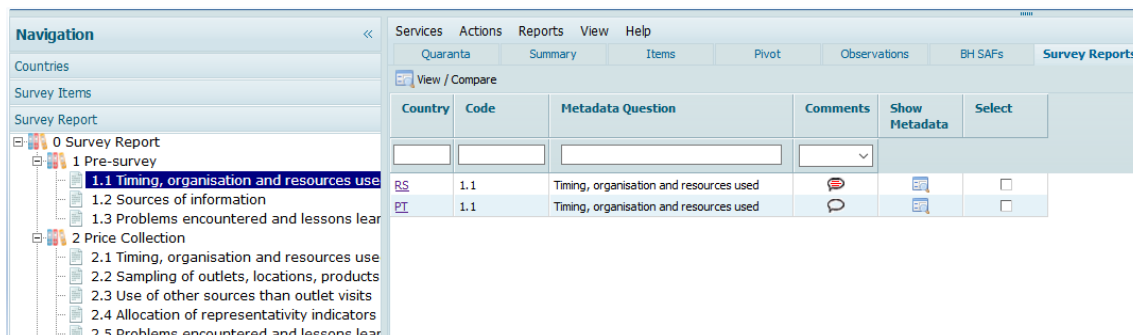
A new tab has been inserted in VT in the validation round of the corresponding price survey for this purpose and placed next to the BH SAFs tab.



Besides the tab, the new Survey Report pane that provides the survey report tree is included among the other panes.



This tree serves as a navigation mechanism through the sections of the survey reports, e.g. a user can select a chapter/section from the tree in order to view further details.



## Survey reports tab

To summarize, select the pane **Survey Report**, select a question from the tree. As result, a grid view with following columns will be displayed under the **Survey Reports** tab:

- Country
- Code
- Metadata Question
- Comments
- Show Metadata
- Select

From this view you can see and add comments and view the provided information for a single country or view side-by-side responses for several countries.

### ➤ Country

This column includes the 2-digit country code. The code contains a link, click on the country code and the metadata editing tool for the current SR will open in a new window.

Sorting and filtering may be used for this column. For sorting countries' codes, click one or two times and countries will be sorted in alphabetical ascending or descending order. For using the filter, type the letters in the white box displayed below the column header.

### ➤ Code

Here you can see the number of the question (sub-section).






### ➤ Metadata Question

The name of the question is displayed in this column.

### ➤ Comments

Comments, questions, answers can be added to any of the survey report sub-section. This is similar to the questions addressed in the Validation Tool to the price data and the answers and resolution

comments. In the Survey Reports tab, the comments column includes the balloon symbol in one of the following stages:


-  White: there is no comment, question, answer
-  Black: there is a simple comment for that section
-  Red: There is an open question
-  Blue: The question is answered
-  Green: The answer was evaluated

Click on a balloon to include your comment. Coordinators can use these balloons to add questions, evaluate the answers or just add simple comments. Countries can enter their answers or comments (*see section Task Report below*).

A filter is included for the comments column that allows the user to select in a specific section for *empty, simple (comments), question, answer, resolved* comments.

A similar filter is available in the Task Report pane (*see section 1.6 Task Report*)


### ➤ Show Metadata

Click on the symbol  in this column and a pop-up window will be displayed. The symbol appears in each country-row. Choose one row/one country and the information displayed in the pop-up window is the answer of that country for the question you have selected from the survey tree.

### ➤ Select

This column allows you to select several countries and to visualise information provided by them for a specific section.

Selection is done by checking the radio buttons displayed here. Note that you can opt for a limited number of countries, selecting a large number of countries would reduce the good visibility of the information displayed afterwards.

Make your selections then click on the  **View / Compare** button displayed in the main menu of the Survey Reports tab. A new window will appear displaying the section (question) and the information provided by selected countries.

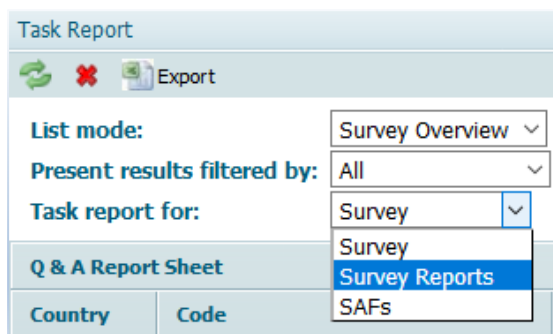
In a next version of the tool, an export of the displayed information will be available. However, the export for all content of the survey report can be downloaded (*see section Reports*).



Besides the specific tab, survey reports related information is on **Reports** available in the main menu and **Task Reports** pane.

## Task report



Select the task report either by directly selecting the pane displayed in the left side or by going to Reports and opt for Task report. From the pane, in the section **Task report for:** choose Survey Reports.





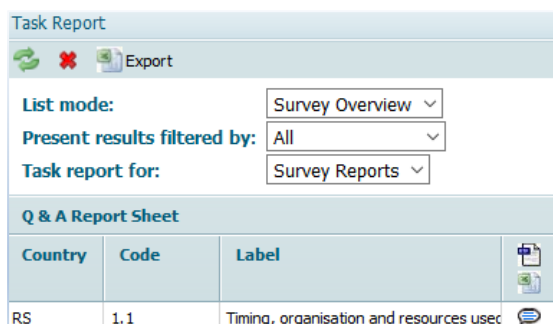
The screenshot shows the 'Task Report' interface. At the top, there are icons for Refresh (circular arrows), Close (red X), and Export (document with arrow). Below these are three dropdown menus: 'List mode:' set to 'Survey Overview', 'Present results filtered by:' set to 'All', and 'Task report for:' set to 'Survey'. A dropdown menu is open for 'Task report for:', showing options: 'Survey', 'Survey Reports' (highlighted in blue), and 'SAFs'. Below the dropdowns is a section titled 'Q & A Report Sheet' with a table header showing 'Country' and 'Code'.

The standard columns in the **Q&A Report Sheet** will show the country code, code of the section and the label of the question. The balloon symbol will indicate if a comment, question, answer, resolution is included.

The exports features available in the Task Report pane here allow you to get:

- the list with sections having a comment. Click on 
- the list with sections and comments. Click on the first or second pictogram  available in the Q&A Report Sheet to get the information in Word or Excel format.

Press on Refresh  to update the Q&A grid, and on exit  to close the task report view.



This screenshot shows the 'Task Report' interface with the 'Q & A Report Sheet' table populated. The table has columns: 'Country', 'Code', 'Label', and a balloon icon column. The first row contains the data: 'RS', '1.1', 'Timing, organisation and resources used', and a balloon icon. Above the table, the 'Task report for:' dropdown is now set to 'Survey Reports'.

As mentioned earlier in the Comments section, a filter is implemented here too and allows you to filter for *Questions, Answers, Resolved (resolution), Simple Comments*.

By clicking on the balloon here or clicking on the corresponding balloon in the Survey Report grid view (Survey Reports tab - Comments Column), further information will be displayed in the Comments pane.

The structure of the task report is similar to the one of price data survey.

Two boxes are displayed, one contains the comments history and one is the editing box - add your text here.

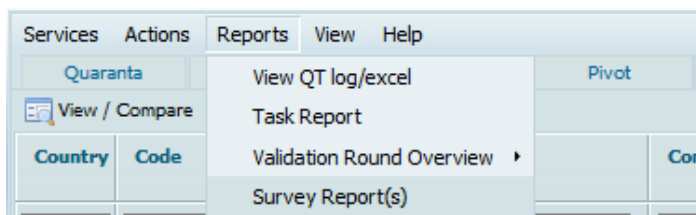
Once you've added your text, either a comment or answer or else, select the type of your text - *Simple Comment, Question, Answer, Resolution* - if other than the default one displayed. The type displayed as default differs on the user profile as well as the type of the previous comment, if question, answer etc. Press on the **Save** button to actually send your reply, otherwise on **Cancel**. The **Delete** button if pressed will apply on the latest insert from the Comments History Box as long as you were the sender.

In order to add an information (either question, comment or else) to a specific section of the survey report in the Validation Tool, assuming that there is no previous comment on the section, select the section from the survey tree and click on the empty balloon from the Survey Reports Grid View.

Adding a text via the balloons will add the information in VT only. If you want to add the information directly in the survey report, this shall be done in MET. If proceeded in this way, do not forget to re-submit the new SR version so that it becomes visible in VT. Here the information provided via the balloons will remain available even if the SR is updated (e.g. Q&A will not be overwritten).

## Reports

Go to main menu of VT, Reports section. Besides the Task Report action included here (*see section above*) there is the **Survey Report(s)**.



This action allows you to export reports of all countries selected in the countries tree. The export is an html file. If wished to visualise the document in a different format, save the file on your computer then open it with a different application (e.g. Word, Excel).

## 4. CONTACT – USER SUPPORT

Eurostat PPP team: [Estat-PPP@ec.europa.eu](mailto:Estat-PPP@ec.europa.eu)

Agilis (Report a problem/bug): [ppp-helpdesk@agilis-sa.gr](mailto:ppp-helpdesk@agilis-sa.gr)