



# Introductory User Guide

November 2018

## **Overview**

The Introductory User Guide covers the basics to get you started in MonQcle. It includes instructions on how to create a standard cross-sectional dataset. Keep in mind that MonQcle was created as a tool for researchers to conduct policy surveillance. Many MonQcle features are geared towards establishing a machine learning system to make policy surveillance more efficient. This Introductory User Guide is intended to only cover the basics and does not address every feature. For further instructions or help creating a longitudinal dataset, please contact [support@legalscience.com](mailto:support@legalscience.com). We are happy to provide additional training demonstrations as needed. Although it is not required, we recommend that users have an introductory knowledge of policy surveillance. For an introduction to policy surveillance, we recommend the Learning Library at LawAtlas (<http://lawatlas.org/page/lawatlas-learning-library>), created by our colleagues at the Policy Surveillance Program.

The MonQcle Introductory User Guide will cover:

- Making an Account
  - Subscriptions
- Creating a Dataset
- Adding Coding Questions
  - Question Types
- Adding Records
- Coding Records
  - Adding Citations
  - Adding Caution Notes
- Reviewing a Dataset
- Button & Icon Key

## **Making an Account**

To start creating datasets, you must first create an account at [MonQcle.com](http://MonQcle.com). Click on the “Start Now” button and fill out the Register form on the left-hand side. You will receive an e-mail with instructions on how to activate your account. Be sure to check your spam folder if this e-mail does not appear in your inbox. Once you’ve activated your account, you’re ready to sign in and start creating!

## **Subscriptions**

Each new MonQcle user can create one (1) free dataset per account. If you are interested in a paid subscription to create multiple datasets and work as a collaborative team, please contact [sales@legalscience.com](mailto:sales@legalscience.com). If activated your account and need to be added to an existing subscription plan, please contact [support@legalscience.com](mailto:support@legalscience.com) with your MonQcle username so that we can add you to the subscription.

## Creating a Dataset

When you sign into your MonQcle account, you will arrive at your profile page. This page will list your current dataset projects as well as your group memberships if you are a part of a subscription plan. To create a new dataset, click on the “Create Project” button. Here, you must title your dataset and provide a quick description of what your dataset is about. Click “Create Project” and you will be taken to the main page of your new dataset.

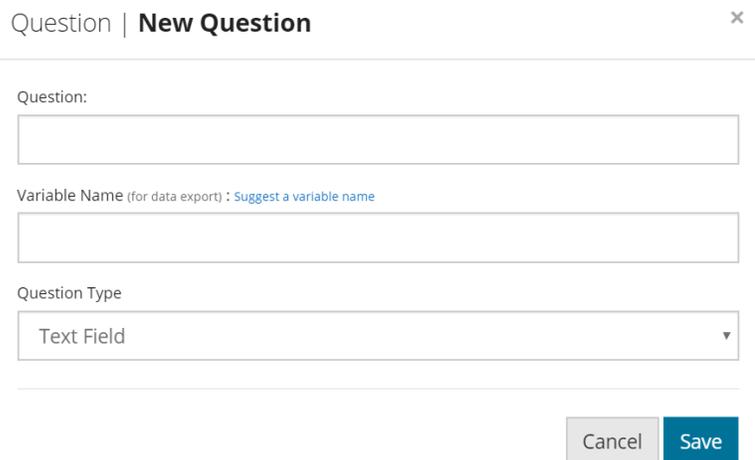


The screenshot shows a form titled "Dataset creation". It has two input fields: "Title" with the text "Distracted Driving Laws" and "Description" with the text "This dataset covers the current distracted driving laws in all 50 states and the District of Columbia." Below the fields is a "Create Dataset" button.

## Adding Coding Questions

From the main page of your dataset, click on the “+ Add Question” button located on the left-hand side. Here, you must add your coding question and a variable name to identify the question for the codebook and statistical data pages.

Not sure what to put as a variable name? Click on the “Suggest a variable name” option and the system will generate one for you.



The screenshot shows a modal window titled "Question | New Question" with a close button (x). It contains three input fields: "Question:" (empty), "Variable Name (for data export) : [Suggest a variable name](#)" (empty), and "Question Type" (dropdown menu showing "Text Field"). At the bottom right are "Cancel" and "Save" buttons.

## Question Types

Lastly, you must select the Question Type. Here's a quick rundown of the most commonly used question types:

- **Text field**



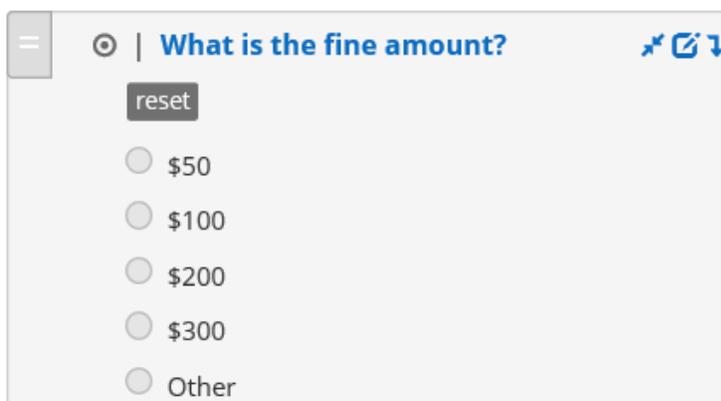
A screenshot of a question interface. At the top left is a grey square with a white equals sign. To its right is the text 'A | What are the exceptions?' in blue. Further right are three blue icons: a cursor, a document, and a downward arrow. Below this header is a large, empty rectangular text input area.

- **Binary – mutually exclusive**



A screenshot of a question interface. At the top left is a grey square with a white equals sign. To its right is the text '- | Does the jurisdiction have a distracted driving law?' in blue. Further right are three blue icons: a cursor, a document, and a downward arrow. Below the question text are two radio button options: 'Yes' and 'No'. At the bottom right is a grey button labeled 'reset'.

- **Categorical – mutually exclusive**



A screenshot of a question interface. At the top left is a grey square with a white equals sign. To its right is the text '⊙ | What is the fine amount?' in blue. Further right are three blue icons: a cursor, a document, and a downward arrow. Below the question text is a grey button labeled 'reset'. Below the button are five radio button options: '\$50', '\$100', '\$200', '\$300', and 'Other'.

- **Categorical – check all that apply**

☑ | **What types of behavior are prohibited?**

reset

- Handheld phone calls
- Hands-free phone calls
- Texting
- Internet browsing
- Other

If you select one of the categorical question types, you will then add in your answer choices one at a time by clicking on the blue + button (also known as the *Add a response* button). Answer choices can be re-ordered by clicking on the shaded gray bar on the left-hand side and dragging the answer choice to its desired location.

**Responses:**

+ Option: \$50

+ Option: \$100

+ Option: \$200

+

Questions

+ Add Question

1 | 1 Is there a law?

☑ | 1.1 What does it cover?

2 | 2 Does the law cover interference with a service dog?

Click “Save” and you have created a question. From there you can continue to add questions following the same process as above. To add a conditional question, you can click *Add sub-question* button at the top of the listed question. You can also re-arrange the order of your questions by

clicking the box on the left side of the question and dragging it to the desired position.

You may edit the text of your coding question, variable name, or answer choices at any time throughout the dataset creation by clicking on the *Edit question* button. Please note that you cannot edit the question type once the question has been created – you will need to delete the coding question and create a new one.

## **Adding Records**

To add a record, click “Add record” from your dataset home page. Choose the desired jurisdiction from the drop-down list: you can currently code Countries, States, U.S. Cities and Counties, as well as additional settlements and territories. Simply start typing the jurisdiction you wish to code until you see it appear in list below and click on it. Confirm your selection with the Google map depiction by clicking “Next.” If your desired jurisdiction does not appear, please contact [support@legalscience.com](mailto:support@legalscience.com).

Next, you need to add a time range for the record. This time range covers the period of observation for the laws included in the record. For example, if you want to create a record that shows you the current state of Pennsylvania laws on Distracted Driving, the effective date of the record should be the most recent effective date among the Pennsylvania laws you wish to include. The valid through date will be the end date for your observation.

Record | **Properties**

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Pennsylvania 

---

Effective	Through
2018-10-19	2018-11-19

Series Title



← Back
Save ✓

Once you enter the dates, you must label the record by entering a “Series Title.” This helps if you have multiple coders inputting records so that you can easily identify their records. Once you click “Save,” you will be taken to the individual record page.

## Coding Records

Now that you've added a record, you can start adding the laws you wish to code from. To add a law, click on the "New Source" button. Enter the citation and title for the law in the Title field. Then add the date range for that version of the law – each law added must be in effect during at least the entire time range of the coding record itself. Generally, for a cross-sectional dataset, you will enter the effective date for that version of the law and the end date of your observation.

Once you click "Create" you can copy and paste the text of your law in the

generated text box. Be sure to check the formatting of your law when you paste it into the text box for accuracy. Follow those steps to add all the laws necessary for your record.

Source | New

Title

effective: 12/24/2012 through: 5/1/2015

Select Range: 12/24/2012 5/1/2015

Create Cancel

To code the record, you can expand each question one-by-one by clicking on the text of each question itself, or you can expand the entire question field by clicking the *Expand field* button next to "+ Add Question." Answer each coding question by selecting your desired answer choice or inputting your answer into the text field.

## Adding Citations

While answering your coding questions, you may notice a gray citation box below each coding response. This citation box is for MonQcle users working in older migrated datasets and is not active for new users. Instead, MonQcle allows you to specifically link sections of text to coding answers by highlighting or "marking up" the legal text and "dragging & dropping" your selection to pin the citation to the desired coding answer, as explained below. You can either add a citation by citing to an entire law or you can add a citation to a specific subsection of legal text.

To cite to an entire law, click on the pushpin button at the top left of the individual law (also known as the *Cite entire law* button). The “Add Markup” Box will appear. The top field, “Tags” allows you to label the particular citation – this step not only helps you keep track of multiple citations, but it helps MonQcle’s machine learning associate sections of laws with user-input identifiers. If you are not sure what to use as a tag, you can select one of the suggested choices below the field. Both the Pin-Cite field and Document Title field will automatically populate with your citation and full citation title, respectively. When you are citing to an entire law, you do not need to specify a pin-cite. Once you click “OK,” a green button with your username and pushpin icon (also known as the *Tagged citation* icon) will appear at the top of that law. Complete the citation by clicking on that *Tagged citation* icon and dragging it over to the coding question you wish to cite. The citation is complete when that green icon appears with your coding question and changes to a *Linked citation* icon displaying your tag.

**Add Markup**
✕

Tags (separate by comma):

Definition

+ service animal defined
+ stat
+ rev
+ nev

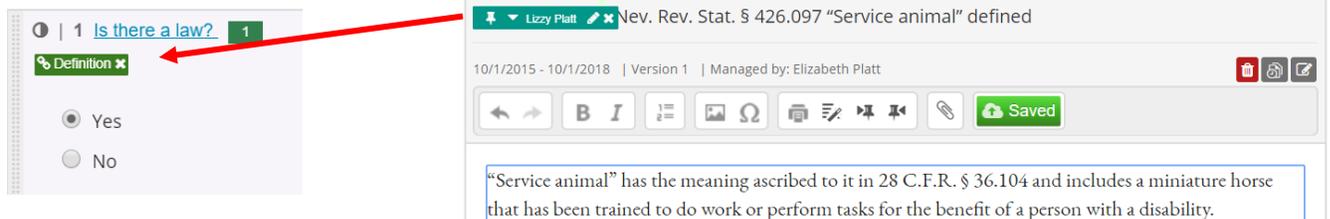
Pin-Cite:

Nev. Rev. Stat. § 426.097

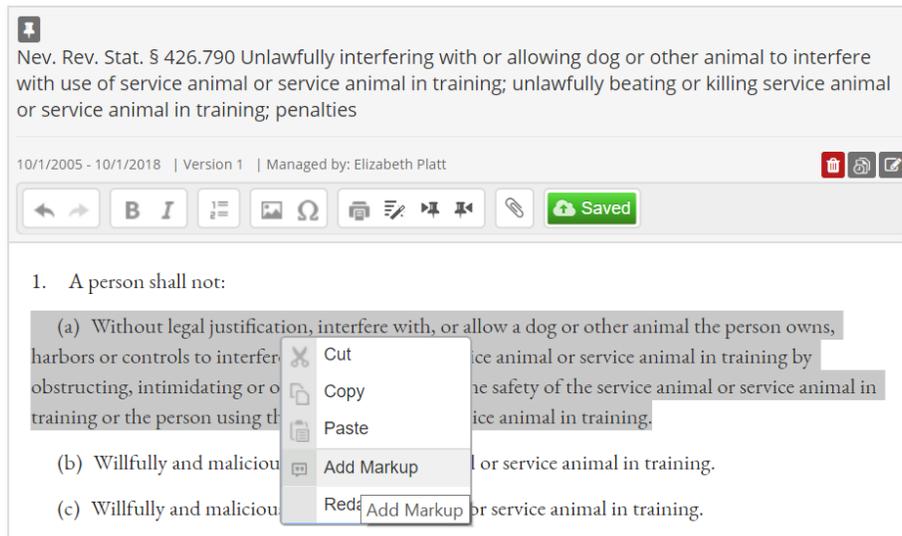
Document Title:

Nev. Rev. Stat. § 426.097 “Service animal” defined

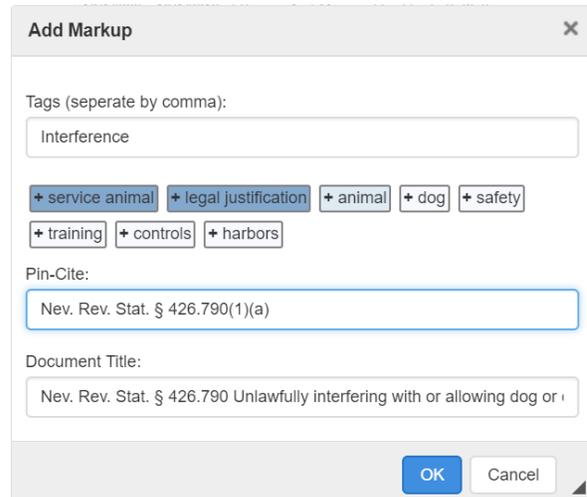
OK
Cancel



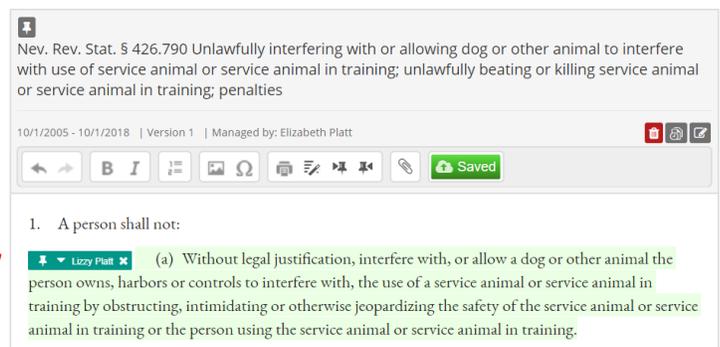
To cite to a specific subsection of text, you will highlight the specific subsection of the law that you feel answers your coding question. This process is called “creating a markup.” Right-click that selection and choose “Add Markup”



Similar to the citation steps above, in the “Add Markup” pop-up box you can tag your citation with a keyword to label with your text markup or choose one of the suggested tags. Again, the Pin-Cite and Document Title fields will automatically populate with your citation and citation title, respectively. You can then add the specific subsection for the pin-cite of the text markup.

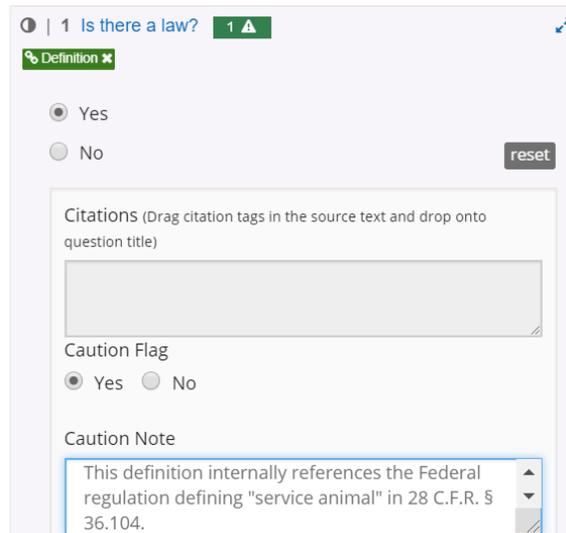


Once you click “OK,” your selected citation area will remain highlighted and the *Tagged citation* icon with your username will appear to the left of your selected text. Simply click and drag that *Tagged citation* icon to the question you wish to cite. Once you release that icon, a *Linked citation* icon will appear next to the question in green, signifying a successful and complete citation.



## Adding a Caution Note

Sometimes coders will want to provide more information with their coding answer or highlight a specific nuance in the law. While selecting your coding answer, you can add a caution note to your response to type in a text note. This caution note will appear in your standard data download and on your published dataset page. To add a caution note, click “Yes” under the Caution Flag field below the coding question and type your note in the text box. Once you have entered your caution note, a *Caution note* icon will appear next to you coding question.



The screenshot shows a coding question interface. At the top, the question is "1 | Is there a law?" with a green flag icon and a "1" in a green box. Below the question, there is a "Definition" field with a close icon. The "Yes" radio button is selected. Below the radio buttons is a "Citations" section with a text box and a "Caution Flag" section with "Yes" selected. At the bottom, the "Caution Note" field contains the text: "This definition internally references the Federal regulation defining 'service animal' in 28 C.F.R. § 36.104."

## Downloading the Data

From the main page of your dataset, you can review your records by clicking the “Export” tab to download an Excel spreadsheet of your coding data. Click “Export Standard Report” to download and Excel spreadsheet of all coding inputs including citations and caution notes. Click “Export Statistical Report” to download an Excel spreadsheet of all your coding responses by variable. In each case, once the report is generated, it will appear in the Current & Archived Reports list. Click the blue download button to finish the download.

## Button & Icon Key



*Add a response:* this button is used when adding answer choices for categorical question types (mutually exclusive and check all that apply)



*Add a sub-question:* this button appears on the coding question panel in the main dataset page. Use this button to create conditional or “child” questions to an existing “parent” question.



*Edit question:* this button appears on the coding question panel in the main dataset page. Use this button to edit question text, variable names, or answer choice text.



*Expand field:* this button appears on the main dataset page in the coding question panel and expands the coding questions so that you can view the answer choices. It also appears in the individual coding records –you can use it to expand your view of the coding questions within the record itself.



*Cite entire law:* this button will appear at the top of every source you add to a coding record. Pushing this button will allow you to add a markup of the entire law. This is best used for coding questions asking if a certain type of law exists – you want to cite to the entire law as evidence.



*Tagged Citation:* this icon appears when you have marked up either an entire law or a selection of legal text. It shows that it has been tagged, but it is not yet linked to a particular coding question. To complete the citation, you will need to drag and drop this icon over the coding question you wish to cite.



*Linked citation:* this icon shows a successfully linked and complete citation next to a coding question. It will display the tag you input during the markup process.



*Caution note:* this icon appears next to coding questions inside an individual coding record where the user has entered a caution note about a particular coding response.