PROGRESA

Proyecto Global para la Revalorización de Evidencias sobre el Aprendizaje en Sistemas Subrepresentados
Project for the Global Reassessment of Evidence on Student Achievement in Overlooked Systems

PROGRESA ANALYTIC FRONTIERS AND METHODS SERIES NO. 3

PROGRESA: Research Notebook Handbook

Standards, structure, and practices for rigorous team notetaking and note keeping

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Why Note keeping Matters in PROGRESA[1]

This handbook codifies how our team documents empirical work in OneNote so that our notes function as a digital laboratory notebook for our comparative, mixed-methods social-science research. Good record keeping strengthens data integrity, improves reproducibility, accelerates collaboration, and supports cumulative inquiry across team members, countries, cycles, and tasks.

In PROGRESA we use the research notebook not as a mere personal memory aid but as a formal, shared research record that underwrites the *integrity*, *reproducibility*, and *communicability* of our empirical work. Mature traditions of laboratory practice emphasize that good recordkeeping is essential for ensuring the integrity of research data: it requires comprehensive, contemporaneous documentation of procedures, conditions, parameters, and anomalies so that results can be repeated, assessed, and credibly incorporated into the knowledge base. Although formulated in the natural sciences, these standards translate directly to empirical social-science inquiry, where our "experiments" encompass coding sessions, modeling decisions, instrument design, and data-conditioning steps that must be *observable* after the fact. Thorough entries improve reproducibility and thus the *epistemic value* of our work, and—crucially—they also function as a medium for analytical thought, helping our team to summarize, evaluate, and refine ideas as we proceed.

Equally important, ethical data management frameworks insist that sound recordkeeping is a *group* responsibility that must be designed deliberately at the start of a project, with clear roles, communication channels, and quality-assurance mechanisms (e.g., who records what, when problems are escalated, how versions are preserved, and how responsibilities are handed off when personnel change). For multi-person, multi-site teams such as ours, the research notebook is the concrete instrument that coordinates planning, training, and responsibility, and that converts abstract "data-management plans" into daily, auditable practice.

A compelling reason to adopt a digital notebook in social science, beyond simple convenience, is that modern tools enable *traceability* at scale. In OneNote, for example, a shared notebook can preserve page versions, expose recent edits and who changed what, recover deleted pages, and consolidate tagged items into a cross-page summary. These are capabilities that are straightforward analogues of "date-stamped, signed entries" and cross-referenced registers in traditional lab books. This combination of fine-grained edit history, authorship visibility, recovery affordances, and tag-based summary creates the conditions for transparent, cumulative work across multiple countries, instruments, and researchers.

[1] And in all empirical research, personal or in teams!

Finally, the PROGRESA notebook is the backbone of our transparency policy: it tells any qualified reader *what was done, when, by whom, with which inputs and software versions, and with what uncertainties*, linking to the authoritative copies of data and code in institutional repositories. This is how we turn the normative commitments of methodological rigor into a daily, inspectable practice that sustains scholarly credibility and accelerates team learning.

Principles: Transparency, Rigor, Efficiency, Care (from norms to practice)

- **Transparency.** Notebook entries should allow a competent colleague to *retrace the whole chain of reasoning and action*: what files were used, how they were transformed, which decision rules were adopted (and why), what anomalies arose, and what alternatives were considered. The standard in formal guidance is clear: when in doubt, record more, not less, especially during "live" work when it is difficult to foresee what will later prove salient. The goal is to leave behind legible evidence of process, not just outcomes.

- **Rigor.** Reproducibility in social science depends on documenting procedures and parameters (e.g., weighting schemes, inclusion/exclusion criteria, recodes), software and package versions, and data/code locations, alongside uncertainties and alternative interpretations. A digital notebook can embed the relevant artifacts (scripts, drafts) in-place, while linking raw data to the authoritative repository path (SharePoint/OneDrive), thereby achieving both completeness of context and discipline about what belongs where. This aligns with ethical data-management guidance that stresses planned procedures, responsibility assignment, and training.

- **Efficiency.** The point of structure is not bureaucracy but coordination and retrieval. OneNote supports paragraph-level tags (e.g., *To Do*, *Question*, *Important*) and provides a Find Tags pane that can be scoped to a section or the entire notebook and exported to a Summary Page: a lightweight way to generate weekly sprint review checklists without proliferating secondary trackers. Standardizing a page template also reduces cognitive load and speeds onboarding for future team members and partners.

- **Care.** Ethical conduct requires protecting confidential or restricted data and ensuring that notebooks do not inadvertently become data silos. The rule is straightforward: attach small working artifacts (scripts, code, drafts) to the notebook page *for context and auditability*; keep raw datasets and restricted materials in approved repositories and link to them from the notebook, with exact paths and versions noted. Planning, communication protocols, and clearly distributed responsibilities are part of the *care* we owe to participants, partners, and future users of our work

Notebook structure and Governance (a design for cumulative work)

A credible notebook is not only *what* we record but *how* we organize the work. We maintain a single shared notebook which, in time and if necessary, we may divide into Section Groups for *(a) Country Work, (b) Methods & Instruments (AFMS), (c) Data & Code Links, (d) Meetings, (e) Admin)*. The structure may evolve as would be consonant with ethical data-management advice to define policies, procedures, and responsibilities for the whole group as part of research planning.

We standardize page templates (see the template in the Appendix) so that every task page captures *Date, Author, Task Description, Problems Encountered, Files and Outputs* (with attachments/links and versions*), Current Status, Links to Previous/Next Steps, Additional Notes, and Questions for the Team*: a social-science translation of the lab-notebook canon that the entry be "thorough, consistent, and communicative." Template use is directly supported in OneNote and provides the scaffolding that makes our notebook a reliable instrument rather than a miscellany of personal styles.

Governance requires *visibility and accountability* without friction. The notebook must make it easy to see what changed, who changed it, and when, and to recover prior states when needed. OneNote's History features, such as Page Versions, Recent Edits, Find by Author, plus the Notebook Recycle Bin/Deleted Notes, provide the necessary provenance trail and safety net for collaborative analysis. This is the digital analogue of dated signatures and retained pages in bound lab books; we treat it as part of our quality system.

Finally, governance includes work-cadence instrumentation. By tagging action items and questions *at the paragraph level*, then running *Find Tags* to *Create a Summary Page*, we generate sprint review sheets directly from the working record, eliminating duplicate trackers and ensuring that the questions driving discussion are exactly those embedded in task work. This practice operationalizes ethical guidance to maintain regular, effective communication and to define responsibility for data quality across a research group.

The PROGRESA Note Template: Fields and Usage[2]

Please note the following template and complete each field as appropriate on every task page:

1. **Date:** Use YYYY-MM-DD. Keep as created; later edits are captured in Page Versions.
2. **Author:** Initials (e.g., GV, JM, LH, etc.). If others edit, add "Edited by: XX (YYYY-MM-DD)".
3. **Task Description:** Objective and scope; explicitly name datasets, documents, instruments; list page IDs or file names and describe your task in each and every work session.
4. **Problems encountered:** Describe issues and attempted fixes; paste error messages or screenshots where useful. Point out failures or difficulties with our measurement, analytical or modelling tools.

[2] Consult the template in the appendix.

5. **Files and Outputs:** Attach scripts, code, and drafts to the page; or insert cloud links (SharePoint/OneDrive). Record exact paths and versions. Keep your own backup as well!
6. **Current Status:**Select one: In Progress; Pending Review; Completed; Blocked. If Pending Review or Blocked, explain in Additional Notes.
7. **Links to Previous or Next Steps:** Insert OneNote links to related pages; add "Next action by" and a date. Record what you will be doing in your next session.
8. **Additional Notes:** Reflections, uncertainties, alternative interpretations; what to check next.
9. **Questions for the team:** Write explicit questions; tag each line with the Question tag and notify in Teams if urgent.

How to use Tags (apply, find, and summarize

Apply tags at the paragraph level so items are retrievable across pages:

- Place the cursor at the start of the line.
- Go to Home → Tags and choose To Do, Question, Important, Citation, or Follow-up[3].
- Use tags to mark decisions, action items, open questions, references, and pending checks.

Find tagged items and create a Summary Page for sprint reviews:

- Go to Home → Find Tags to open the Tag Summary pane.
- Adjust the Search scope at the bottom (current section, notebook, or all notebooks) and click Refresh.
- Click Create Summary Page to add a page listing all tagged items grouped by tag. Use this as the sprint review sheet.

How to Attach Scripts, Code, and Drafts (and when to link)

Attach small working artifacts directly to a task page; keep raw or large data in approved repositories and link to it. Be especially careful with data with personal information of individual research subjects, following all IRB requirements.

- On the task page, choose Insert → File Attachment.
- Select the file (e.g., R/Do/STATA syntax, Python scripts, LaTeX/Word drafts, AI prompts) and then choose Attach File to embed an icon you can double-click to open.
- For documents you want to annotate, choose Insert Printout to place an image of the pages; you can type or draw on top.
- If the file will update elsewhere, insert a link (Insert → Link) to the authoritative copy in SharePoint/OneDrive.

Record the exact repository path, dataset or script version, and software version in "Files and Outputs."

[3] I am just learning myself, but together we will determine how best to do this.

Atlas.ti Workflows: what to record in the Research Notebook

All document, interview, and media coding takes place in Atlas.ti. Use Atlas.ti comments and memos for in-platform reflections. In the OneNote Research Notebook, create a task page per coding session with:

- Project name and Atlas.ti project path/version.
- Corpus segment(s) coded (documents, files, interviews, dates).
- Code families/themes worked, key memos created (paste memo titles and short abstracts).
- Decisions, dilemmas, and next steps; link to exported memo or project snapshot.
- Any confidentiality constraints and storage locations for originals.

Meeting and Outlook Integration

As our project evolves, we will seek to capture meeting context and decisions in one place:

- Create or open a page in the Meetings section (which we will create in due course).
- Insert → Meeting Details, then pick Today or another date to insert title, date/time, and attendees (availability varies by OneNote/Outlook client).
- Capture key decisions, assign action items (tag as To Do), and list open questions (tag as Question).

If Outlook task sync is not available, write "Owner: … / Due: …" inline and track via Tag Summary.

Versioning, Page History, and Recovery

We will use OneNote history to review and recover work:

- History → Page Versions to view prior versions; select a version to preview and click Restore to recover it.
- History → Recent Edits to list pages changed in a chosen time window (e.g., last week).
- History → Find by Author to see who edited what in shared notebooks.
- If content is deleted, open the Notebook Recycle Bin/Deleted Notes and restore pages within the retention window.

Privacy, Ethics, and Data Sensitivity

Do not paste items covered by special IRB rules, or restricted microdata into OneNote. Store identifiers and raw data in approved repositories (SharePoint/OneDrive secure areas) and link from OneNote. Keep OneNote as an index and analytic memo space.

Some Worked Examples

The following are two worked examples, to further explain the template and its intended use:

Example A: Coding a national PISA report entry

Task Description: Coded Argentina 2018 national report, Sections 2–3, Framework Version: AFMS 1. **Files:** link to AFMS codebook version; uploaded coded PDF excerpts. **Problems:** ambiguous use of effect sizes—flagged for team review. **Status:** Pending Review. **Next steps:** discuss at Thursday methods huddle.

Example B: Social and Emotional Skills (SES) analysis (pilot)

Task Description: EDA on SES indicators (perseverance, curiosity, emotional control) in PISA 2022 for Country X; compared distributions by subgroup and examined associations with item-level engagement. **Files:** STATA script v0.3, output plots (linked). **Problems:** replication weights treatment unclear—added question to team. **Status:** In Progress. **Next steps:** verify weights, rerun models, document effect sizes and uncertainty.

Coda

As we adopt this shared notebook and deepen our use of OneNote, we will be learning together. We will be experimenting, adjusting, and gradually mastering the capabilities that best support rigorous empirical work. Understanding *why* disciplined notetaking and notekeeping matter—how they safeguard transparency, reproducibility, and collective reasoning, gives purpose and coherence to the practices we establish. Our goal is not perfection but steady refinement: building habits that honor our commitments to methodological integrity while enabling each member of PROGRESA to contribute confidently to a common evidentiary record. As our project evolves, we will continue to revisit, revise, and strengthen our approach, adapting our practices while keeping our shared aims firmly in view.

APPENDIX: OneNote Template

OneNote template Tuesday, March 3, 2026 5:20 PM

Date:

Author: (2 letter initials will do: JM, FH, GV, etc.)

Task Description: Provide a brief explanation of what has been done, including the pages analyzed and any relevant references so that other team members can clearly identify the task.

Problems encountered: Describe the problem or issue found

Files and Outputs: (please attach any scripts, output files, drafts, SPSS/R/STATA programs or syntax, etc.To the note)

Current Status

- In Progress
- Pending Review
- Completed
- Blocked (in **Additional Notes** Indicate the reason preventing you from completing the task.)

Links to Previous or Next Steps

Additional Notes

Questions for the team