Principles for Archiving Metadata

To protect the overall standard by which the metadata is documented

0. Documentation must make sense

1. Maintain and do not alter the semantic meaning of the questionnaire

Principle 1 must also be maintained at all times. CLOSER intends that the metadata documented is capable of being shared with other DISCiplinarians and organisations, hence principle 1 ensures that CLOSER produces consistent and comparable knowledge. The practical keying to principle 1 requires decisions to be made as to what questions and elements provide meaning. For example, when there are two options for condition text, the text which refers to the true branch is used, and the alternative is usually added as a statement. However, in cases where the second statement only contains the direction (with or without an arrow) it does not have any meaning. To use the example on the right, ‘Go to Section D on page 38’ would be ignored, because options for condition text, instead of ‘marital status’, to impossible condition logic. There are rare situations where principle 1 should be broken in order to follow principle 2 and principle 3.

2. Do not correct the questionnaire

Principle 2 should only be broken when doing so maintains principles 0, 1 and 3. It is fairly common to find what seem like mistakes in questionnaire design, how can range from typos (e.g. ‘marital status’) to impossible condition logic. Any mistake within the questionnaire could lead to the data being collected, and therefore it is important to assist correcting the metadata. Also, what seems like a mistake always has the potential of being done purposely. In such cases, the error is important to be added to the questionnaire. For example, when a questionnaire asks: 3.2 ‘how many?’ Often this question and similar questions can be found within additional information that is not within the questionnaire. So far, the code list is: Yes, No, No known.

3. Only document what is contained within the questionnaire

Principle 3 should only be broken when doing so maintains principles 0, 1 and 2. There are situations where the questionnaire does not provide all of the information to document meaningfully or to generate valid DDS. However, it is important to reframe from adding additional information that is not within the questionnaire. For example, when a question asks: 3.2 ‘how many?’ Often this question and similar questions can be found within additional information that is not within the questionnaire.

4. Do not allow the data to inform what is recorded

Principle 4 is the least significant principle, while documenting the structure, flow and intent of a questionnaire, it is seen harmless to consult the collected data, in order to understand the questionnaire being documented. This principle, however, should also be avoided. The aim of the Sovereign Programme is to record the information used for data collection as accurately as possible, using information that was created after the collection event can alter the perception and understanding of the instrument. For example, when a multiple choice question has an ‘other (specify)’ option. If the same question is given within that option then it is relatively common to substitute the answer in addition to the multiple choice options (e.g. Consuline). It is important to document the additional answer, because it was not offered to respondents and therefore potentially had an effect on the collected data.

The most common situation where breaking principle 4 is valid is when questions 3 or 2 is meta-assisted. For example, in the situation where a question is obviously related to whether the mistake was intentional and whether the mistake had an effect on the collected data.

Principle 0: Must be maintained at all times.

Principle 1: Must be maintained at all times. CLOSER intends that the metadata documented is capable of being shared with other DISCiplinarians and organisations, hence principle 1 ensures that CLOSER produces consistent and comparable data. The practical keying to principle 1 requires decisions to be made as to what questions and elements provide meaning. For example, when there are two options for condition text, the text which refers to the true branch is used, and the alternative is usually added as a statement. However, in cases where the second statement only contains the direction (with or without an arrow) it does not have any meaning. To use the example on the right, ‘Go to Section D on page 38’ would be ignored, because options for condition text, instead of ‘marital status’, to impossible condition logic. There are rare situations where principle 1 should be broken in order to follow principle 2 and principle 3.

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