

## Chapter 21

# Survey Documentation: Toward Professional Knowledge Management in Sample Surveys

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This chapter introduces the reader to new concepts in survey documentation. Readers are introduced to up to date definitions, concepts and tools. The aim is to raise awareness about the benefits of modern knowledge management both for data producers and users.

It marks a major turning point in our views on survey documentation. In a first section readers are introduced to major terms and concepts. Sections leading from classical codebooks to modern relational documentation approaches follow this section. Documentation tools not available until recently will be explained into some detail.

### GLOSSARY OF KEY CONCEPTS

**Cascading Structure.** A network-like system that makes it possible for an documentation item to build upon the information presented by a previous item or even a chain of previous items.

**Codebook.** A document provided by data archives that is similar to a codeplan but contains additional information such as frequencies and a general description of the study.

**Codeplan.** The most basic document that establishes matches between items in a questionnaire and numbers in a data file.

**Documentation.** The act or process of substantiating by recording actions and/or decisions. [www.epa.gov/records/gloss/gloss03.htm](http://www.epa.gov/records/gloss/gloss03.htm).

**Flat File Data.** Rectangular data files that contain each respondent's answers to the survey questions in a row by column format, where the rows correspond to each individual respondent's answers and the columns contain the variables asked in the questionnaire.

**Knowledge Management.** The process of collecting, organizing, classifying, and disseminating information so as to make it purposeful to those who need it.

**Metadata.** Data that describe other data. The term encompasses a broad spectrum of information about the survey, from study title to sample design to details such as interviewer briefing notes to contextual data or information such as legal regulations, customs, and economic indicators.

**Modular Structure.** A structure that avoids single, large chunks of text and instead identifies smaller elements (e.g. classes, sub-classes) that are interconnected or linked.

**Paradata.** Data on the process of collecting data.

**Survey life cycle.** A progression through a similar series of stages that characterize the course of production of a survey from design to publication.