

# Edit Metadata Structures CE Surveys

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# Edit Metadata

- Data handlers
  - Economists, Statisticians, Researchers
  - IT, Management, and Interviewers
- Edits
  - Methods
  - Examples
- Invisible to Handler
- Need for Metadata

# CE CATEGORIES

**HOUSING**  
**APPAREL**  
**FOOD**  
**TRANSPORTATION**  
**HEALTH**  
**EDUCATION**  
**READING**  
**INSURANCE**  
**ENTERTAINMENT**  
**ALCOHOL & BEVERAGES**  
**TOBACCO**  
**MISCELLANEOUS**  
etc. .

# CE CATEGORIES

<b>CATEGORY</b>	<b>SUB CATEGORY</b>	<b>DESCRIPTION</b>
HOUSING	UTILSPS	Total expenditures for utilities, fuels and public services
HOUSING	HOUSEFE	Expenditures for house furnishings and equipment.
HOUSING	SHELTER	Shelter, expenditures for owned dwellings, rented dwellings, and other lodging.
HOUSING	HOUSEOP	Expenditures for household operations including domestic and other household services.
APPAREL	MENABOY	Clothing for men and boys
APPAREL	WOMAGRL	Clothing for women and girls
FOOD	FOODHOM	Food at home
FOOD	FOODAWY	Food away from home, sum of food away excluding meals as pay and meals as pay

# EDIT Samples

## RECODES

- Create New Fields
- From: Questionnaire, Recodes, Constants
- 2 Major Types

## COMBINED CODES

- Codes representing 2 or more distinct item codes

## INVENTORY CONSISTENCY

- Edit on property, vehicles, insurance policies
- Checks for duplicates, validity
  - e.g., property really owned

# EDIT Samples



BUSINESS  
PERCENT

- Business percentage validity
- Reimbursements



BRACKET EDIT

- Consistency of income brackets
- Median income for bracket assigned



VEHICLE EDIT

- Vehicle financing range and consistency

# EDIT Samples

## SUMMARY VARIABLES

- Aggregate UCC by consumer unit
  - Uses mapping concordance file
  - Z-variables for expenditure
  - E-variables for outlay

## INCOME RANKING

- Ranks family income
  - Highest to lowest
  - Before taxes, by quarter

## SCREENS

- Identify outliers
- Applies largest gap & extreme value
- Both expenditures & income

# CE FIELD TYPES

FIELD TYPE ID	FIELD TYPE	SUBTYPE	DESCRIPTION
1	EXPENSE		Consumer Expenditure Item Variables.
2	EXPENSE	BUSINESS	Business Expense Item Variables.
3	INCOME	MEMBER	Consumer Income Variables.
4	INCOME	FAMILY	Consumer Unit Income Variables.
5	TAX	FAMILY	Consumer Unit Income Tax Variables.
6	TAX	MEMBER	Consumer Income Tax Variables.
7	SUMMARY	OUTLAY	Summary Outlays E Formula Variables.
8	SUMMARY	EXPENSE	Summary Expenditure Z Formula Variables.
9	RANK	INCOME	Income ranking variable.
10	RANK	EXPENSE	Expenditure Ranking Variable.
11	RECODE	EXPENSE	Expense Recoded variables.
12	RECODE	PERCENT	Expense Recoded variables based on percentage values.
13	LOOKUP		Lookup type name having a list of valid codes.
14	DEMOGRAPHIC		Consumer Demographic Data Variables.
15	PARADATA		Data variables representing the process by which the survey data were collected.
16	WEIGHT		Weight Information



# CE FIELD TYPES

FIELD TYPE ID	FIELD TYPE	SUBTYPE	DESCRIPTION
17	INDICATIVE	CU	Consumer Unit data which describes, suggests about a specific attribute of person or item.
18	INDICATIVE	MEMBER	Consumer data which describes, suggests about a specific attribute of person or item.
19	INDICATIVE	CENSUS	Data which describes psu, census unit control, sampling etc. .
20	SCREENER	BUSINESS EXPENSE	Business Expenditure Screener Variable.
21	SCREENER	EXPENSE	Personal Expenditure Screener Variable.
22	SCREENER		Any screener Variable.
23	SCREENER	GIFT	Gift item Screener Variable.
24	SCREENER	TAX	Tax Item Screener Variable.
25	SCREENER	INCOME	Consumer Income Screener Variable.
26	SCREENER	REIMBURSEMENT	Reimbursement Screener Variable.
27	SCREENER	DEMOGRAPHIC	Consumer Demographic Screener Variable.
28	SCREENER	INDICATIVE	Screener variables which describes, suggests about a specific attribute of person or item.

# Edit Process

**LOGICAL  
SEQUENCE**

- Typical approach

**RELATIONAL  
ALIGNMENT**

- Mathematical approach
- Uses alignments and relations as guide

# SUMMARY Variables Config

DESC	UCC	VAR	VARTYPE	LEVEL1	LEVEL2	LEVEL3	LEVEL4
Fuel oil	250114	FUELOIL	SUMMARY	ALLFUEL	UTILSPS	HOUSING	TOTAL
Other fuels	250223	OTHRFLS	SUMMARY	ALLFUEL	UTILSPS	HOUSING	TOTAL
Electricity	260113	ELECTRC	SUMMARY	ZELECTRC	UTILSPS	HOUSING	TOTAL
Natural gas	260214	NATLGAS	SUMMARY	NATLGAS	UTILSPS	HOUSING	TOTAL
Telephone	270103	TELEPHE	SUMMARY	TELEPHE	UTILSPS	HOUSING	TOTAL

# SUMMARY High ( process view )

XXID	SUM_LEVEL	VARTYPE	VARNAME	SUM_VALUE
XX1102058	LEVEL4	ZSUMMARY	TOTAL	11025.20
XX1102058	LEVEL3	ZSUMMARY	HOUSING	6352.00
XX1102058	LEVEL2	ZSUMMARY	ENTRMNT	180.00
XX1102058	LEVEL2	ZSUMMARY	SHELTER	5853.00
XX1102058	LEVEL2	ZSUMMARY	TRANPRT	2864.00
<b>XX1102058</b>	<b>LEVEL2</b>	<b>ZSUMMARY</b>	<b>UTILSPS</b>	<b>364.00</b>
XX1102058	LEVEL1	ZSUMMARY	TELEPHE	90.00
XX1102058	LEVEL1	ZSUMMARY	TVRADIO	180.00
XX1102058	LEVEL1	ZSUMMARY	RENTDWL	5853.00

# SUMMARY Low ( process view )

XXID	VAR	VAR VALUE	LEVEL1 LEVEL1	LEVEL1 VALUE	LEVEL2 LEVEL2	LEVEL2 VALUE	LEVEL3	LEVEL 3 VALUE	LEVEL 4 L4	LEVEL 4 VALUE
XX1102058	NATLGAS	145	NATLGAS	145	UTILSPS	145	HOUSING	145	TOTAL	145
XX1102058	TELEPHE	90	TELEPHE	90	UTILSPS	90	HOUSING	90	TOTAL	90
XX1102058	ELECTRC	129	ELECTRC	129	UTILSPS	129	HOUSING	129	TOTAL	129
XX1102058	ELECTRC	0	ELECTRC	0	UTILSPS	0	HOUSING	0	TOTAL	0

# Recodes example

Quarterly RENT = Sum(MONTHLY Rent (i) )

where  $i = 1, 2, 3$

Personal Rent % = 1 - Business Rent%

Total 6 variables involved

# RECODES Config

RECODE	DESCRIPTION	RECODE LEVEL	RECTYPE	OPR1 OPR1	OPR1 TYPE	OPER	OPR TYPE	OPR2 OPR2	OPR2 TYPE
		QRT3MCMX							
		=							
		QADRTX1							
		+							
	Total rent paid	QADRTX2							
	in reference	+							
QRT3MCMX	period	QADRTX3	LEVEL3	RENT	QADRTX1	RECODE	ION	ION	2
	Rental cost	QADRTX3							
	last month	=							
	(adjusted for	QRENTALZ			QRENTAL				
QADRTX3	business)	* RENTX3	LEVEL2	RENT	Z	RECODE	*	BASIC	RENTX3 RAW
	Rental cost in	QADRTX2							
	the month (2	=							
	months ago,	QRENTALZ			QRENTAL				
QADRTX2	adjusted for	* RENTX2	LEVEL2	RENT	Z	RECODE	*	BASIC	RENTX2 RAW
	business)	QADRTX1							
	Rental cost in	=							
	the month (3	QRENTALZ			QRENTAL				
QADRTX1	months ago,	* RENTX1	LEVEL2	ERNT	Z	RECODE	*	BASIC	RENTX1 RAW
	adjusted for	QRENTALZ							
	business)	* RENTX1	LEVEL2	ERNT	Z	RECODE	*	BASIC	RENTX1 RAW
	Percentage of	QRENTALZ							
	rental cost	=							
	after deducting	QRENTALZ							
	business	= 1 -							
QRENTALZ	expense	RTBSNSZ	LEVEL1	ERNT	1T	CONSTAN	-	RTBSNS	BASIC Z RAW

# RECODES Data ( process view )

RECODE	LEVEL	RECTY PE	RECODE VALUE	OPR1 OPR1 TYPE	OPR1 VALUE	OPR2 OPR2 TYPE	OPR2 VALUE	OPR	OPR_TYPE
QRENTALZ	1	ERNT	1	CONS 1TANT		RTBSNS 1Z	RAW	B-	BASIC
QADRTX1	2	ERNT	675	QREN RECO TALZ DE		1RENTX1	RAW	675*	BASIC
QADRTX2	2	ERNT	675	QREN RECO TALZ DE		1RENTX2	RAW	675*	BASIC
QADRTX3	2	ERNT	675	QREN RECO TALZ DE		1RENTX3	RAW	675*	BASIC
QRT3MCMX	3	ERNT	2025	QADR RECO TX1 DE		QADRTX RECO 6752 DE		Get_QR 675T3MCMX	FUNCTION



# Metadata Pros

- Quick visual analyses
- Gauge effectiveness of edit process
- Metadata out of sight is out of mind

# Q & A