



Technical and Social Changes during Archive Migration: “Experiences with Social Science Data”

DigCCurr Spring 2009

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April 3, 2009



DATA-PASS

DATA PRESERVATION ALLIANCE FOR THE SOCIAL SCIENCES

The Odum Institute

- Oldest Institute or Center at UNC-CH Founded 1924
- Mission: Teaching, research, & service for social sciences
- Cross-disciplinary focus

Archive Background

- Long history of data collection and storage
- Primary reference contacts were “face to face”
- Paper based catalog
- Several digital archive platform migrations
 - Hardware Changes
 - Software Changes
 - Metadata migrations

Status Prior to Data-PASS

- Sun Microsystems based platform
- SPIRES Database infrastructure
- OpenTEXT Index Search
- Internal based reference system
- Custom Web Interface
 - Perl
 - PHP
 - SAS

Migration Planning

- Investigation of current technologies
- Small scale prototyping
- Commercial package research
- Standards research

Data-PASS Benefits for Odum

- Leverage Collaborations
- Migrate toward increased standards compliance
- Eliminate unsupported technologies
- Provide simplified path for future migrations

The Partners

- ICPSR
- Odum Institute
- Roper Center
- Henry A. Murray Research Archive
- Harvard-MIT Data Center
- National Archives and Records Administration

The Plan

- Identify significant data collections (classic)
- Identify important contemporary data (“at risk”)
- Develop common standards and procedures across partnership

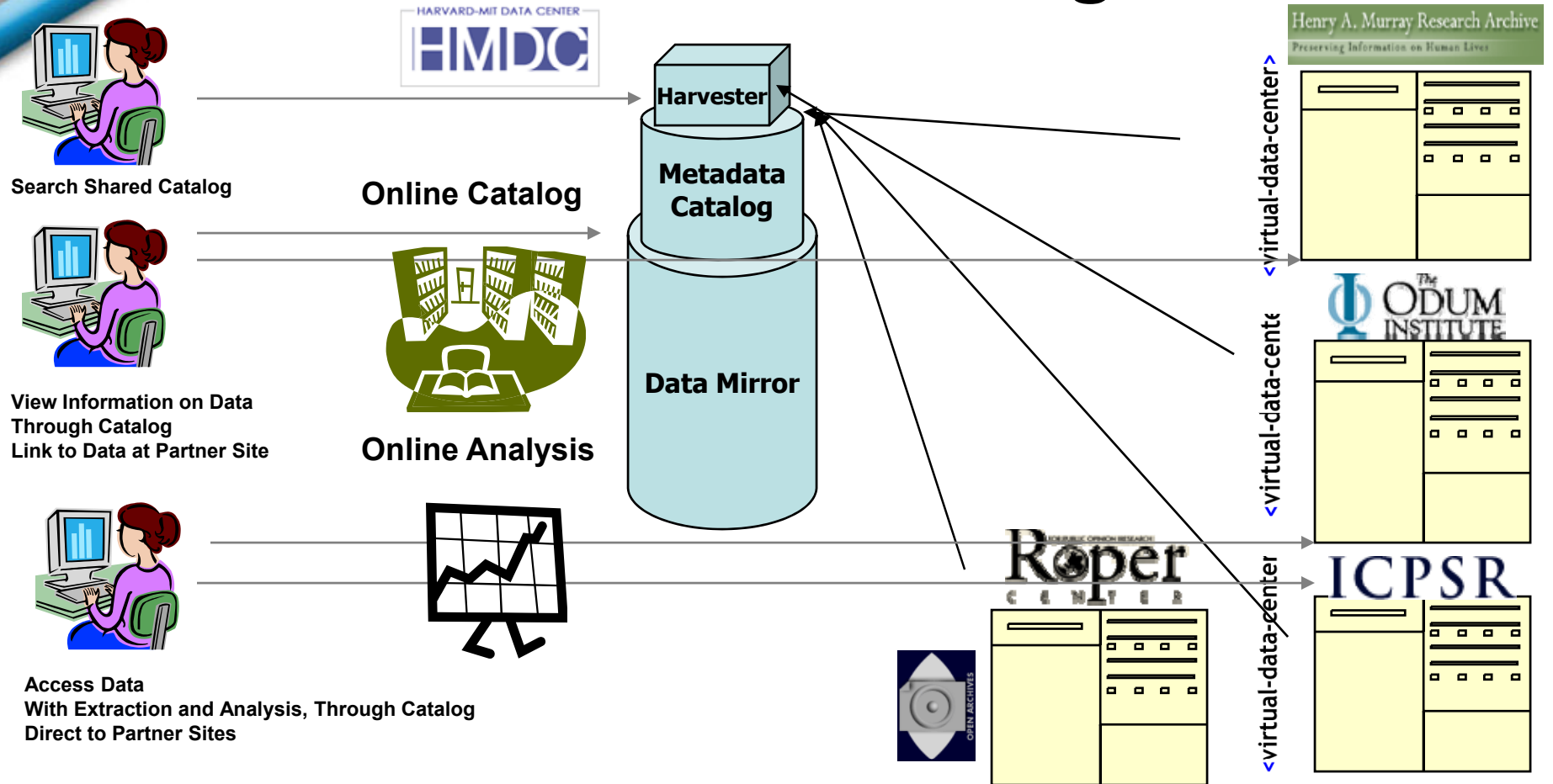
Partnership Goals

- Develop common standards and activities
- Determine how the partnership can expand
- Use technological advances to encourage metadata standards and a shared catalog

Dataverse Network

- Open source platform
- OAI server
- DDI metadata standards
- Federated Approach

Overview of How Catalog Works



Impacts on Archive

- Modified IT infrastructure
- Modified ingest workflows
- Modified collection development policies
- Modified user interfaces
- Modified user reference dynamics
- Modified administrative reporting
- Modified software development workflows

Our approach to this change

- Review existing management infrastructure
- Examine staff skill levels
- Analyze current policies and mission statement
- Manage relationships

Management Structure Changes

- Modified IT staff work roles
- Combined archive & IT administration

Defined New Policies

- Utilized DRAMBORA
- Partnership documentation
- Collaborative collection development

Software Development Changes

- Collaborative development workflows
- Understanding other partners use cases
- Team based management

Archival Processes

- Federated collection development
- Developed new curation workflows
- Developed distributed approach to preservation

User Reference Issues

- User confusion caused by federation
- Many more potential use questions
- Increase in usage and diversity of clients

Administrative Reporting Issues

- Unsure how to deal with federated user statistics
- No upfront agreements on what to collect
- How to describe the usage
- What granularity should we collect

Manage Relationships

- Producers Community
 - Federation Issues
- User Community
 - Interface Migration Concerns
 - Reference Difficulties
- Collaborative Partners
 - Software Development
 - Collection Development

Summary

- Reviews of staffing and management structure was a positive influence
- Managing relationships very important
- Positive attitude and solid strategies
- More effort on user study and evaluation
- Advance consideration of administrative reporting issues within a federated organization

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