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

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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

- Search Shared Catalog
- View Information on Data Through Catalog Link to Data at Partner Site
- Access Data With Extraction and Analysis, Through Catalog Direct to Partner Sites

Data Mirror
Harvester
Online Catalog
Metadata Catalog
Online Analysis

Henry A. Murray Research Archive
Preserving Information on Human Lives

ICPSR
Roper Center

DATA-PASS
DATA PRESERVATION ALLIANCE FOR THE SOCIAL SCIENCES
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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