DDI Handbook
Overview and Examples of Recommended Best Practices

work in progress

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Motivation

• DDI is used by increasing number of data users and producers
• Multiple projects at GESIS are getting more interest in using DDI in addition to existing usage of DDI in the archive and German Microdata Lab
• Observations
  – Heterogeneous use of DDI
    • DDI is complex because the area is complex
  – Large effort for consultancy
• This situation is not unique to GESIS
  – Therefore idea of community approach
Goals

• Best practices for using DDI
  – On business level and technical level
• Audience: cross-disciplinary, for different types of institutions
• Useful and accessible information in homogeneous structure
• Organized in smaller, sometimes bigger chunks of information, more like a FAQ than a book
• Each information part should be self-contained in order of reuse from different perspectives
Previous work

Schloss Dagstuhl - Leibniz Center for Informatics, Germany
Limitations of Existing Papers

- Some are outdated
- Understanding has changed
- Papers have no homogeneous structure
- Coverage not complete
Examples in Related Fields:
Cross-Cultural Survey Guidelines (CCSG)
Examples in Related Fields:

Digital Preservation Management Tutorial
Initial Meeting

• Multiple day meeting in November 2013 at GESIS in Cologne, Germany
• Discussion of overall strategy and concept
• Participants:
  – Peter Granda (ICPSR - Interuniversity Consortium for Political and Social Research, University of Michigan)
  – Larry Hoyle (ISR - Institute for Policy & Social Research, University of Kansas)
  – Uwe Jensen (GESIS - Leibniz Institute for the Social Sciences)
  – Meinhard Moschner (GESIS - Leibniz Institute for the Social Sciences)
  – Joachim Wackerow (GESIS - Leibniz Institute for the Social Sciences)
  – Catharina Wasner (GESIS - Leibniz Institute for the Social Sciences)
  – Wolfgang Zenk-Möltgen (GESIS - Leibniz Institute for the Social Sciences)
Format

- Independent open access online journal (with ISSN)
  - Published twice a year (if articles are available)
  - Each article with persistent identifier (DOI)
  - In cooperation with DDI Alliance
- Structured paper template should:
  - Minimize editing work
  - Harmonize the appearance
  - Facilitate easy access to papers
- License: Attribution-ShareAlike 4.0 International
  - Share — copy and redistribute the material in any medium or format
  - Adapt — remix, transform, and build upon the material for any purpose, even commercially
Editorial Board / Editor

• Editorial board
  – 4-5 members should ideally represent different communities using DDI, spread across several agencies
    • Along the data life cycle (data collection, archive)
    • Academic area, official statistics
    • Substantive, technical
  – Setting policies, final decision on papers

• Editor
  – Communication with potential authors, initial reviews, finding reviewers, assigning reviewers, tracking progress of drafts, setting timelines
Quality Assurance

• Open peer review – i.e. disclosure of the identities of those reviewing articles
  – A lot of people in the DDI community work together, difficult to have blind peer review

• Open peer commentary – could possibly result in publication of new version of article

• Names of authors and reviewers are listed in article and on the website
Article Outline (draft)

Template for Best Practices

Diagram - Relevant DDI Lifecycle Stages

Title*
Subtitle
Series*
Abstract*
Target Audience
Keywords*
Author*
Other Contributors
Editor*
Detailed Description*
Examples
Tools

Related Metadata Standards (a description)
Related DDI Versions*

Local Details

References
  - More General Practices
  - More Detailed Practices
  - Other Related Best Practices
  - Related DDI Elements
  - Related Use Cases
  - Publications

Document Version*
  - Version number*
  - Version date
  - Version rationale

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Recommended Citation*

ISSN/ISBN
URL/DOI

Notes:
Suggested controlled vocabularies for several sections (like Keywords, Target Audience) would be desirable – Perhaps drop-down lists for those writing the best practices

Template version 1.1
Could be based on the future DDI 4 functional views and mapped to 3.2
Formats for Reuse

• DocBook or DITA (semantic markup languages for text)
  • Multiple output formats
    – HTML (single page or chunked) - parts of the paper can be referenced
    – PDF - download, printing
  • Could have links to DDI field-level documentation
  • Could include fragments of DDI 4 documentation (will be in DocBook format)
• Facilitates
  – master glossary and master reference bibliography
  – creation of tutorials by inclusion of parts of multiple best practices
  – Additional material like XML instances in separate files
Technical Platform

- **OJS - Open Journal System**
  - Free open-source software
  - Several 1000 journals are using this system
  - Online presentation of journal articles
  - Provides entire editorial management workflow
    - including article submission, multiple rounds of peer-review, and indexing
    - defining roles for all involved people
Current Ongoing Work

• Formation of editorial board
• Articles in the works:
  – “Using DDI for Creating Study Documentations and Bibliographic Citations” (GESIS/Survey Research Center of U of Michigan)
  – “Mapping the Data Curation Workflow” (ICPSR/GESIS)
• Search for authors and possible topics
  – Review of existing papers and conference presentations
• Search for reviewers
• Website with Open Journal System
Involvement

- Comment on the project
- Write a paper on
  - best practices
  - use cases
- Volunteer as reviewer
- Contact joachim.wackerow@gesis.org