A Review and Redesign of Roper Center Infrastructure

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The Roper Center for Public Opinion Research
University of Connecticut

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Project Goals

• Improve processing of digital objects
• Expand our collection
  – Volume
  – Types of data/objects
• Openness with our policies
• Develop new services
Project Overview

• Funded in 2011 by the Robert Wood Johnson Foundation

• Three Phases
  – Review
  – Design
  – Implementation
I'm going to read you the names of a few people who might run for the Democratic presidential nomination in 2016. For each one, please tell me whether you would be very likely, somewhat likely, not very likely, or not likely at all to support them if they decide to run for the Democratic nomination four years from now?...Secretary of State Hillary Clinton (Source: CNN/ORC International Poll, Dec, 2012)

Subpopulation/Note: Asked of Democrats including leaners. * = less than .5%.

<table>
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<tr>
<th>Topline</th>
<th>Very likely</th>
<th>Somewhat likely</th>
<th>Not very likely</th>
<th>Not likely at all</th>
<th>No opinion</th>
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<tbody>
<tr>
<td>65%</td>
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Review Phase

• Creation of a central repository
• Workflow analysis
  – Hand-offs
  – Skillsets
  – Standards and policies
  – Tracking and queuing
  – Product specific requirements
Processing Workflows

**Acquire Study Materials**
- Prepare Study for Release
- Add Study Level Information
- Add Question Level Information
- Proof Question Level Content
- Release to Public

**Initial Processing**
- Quality Control 1
- Intensive Processing
- Quality Control 2
- Archive Electronic Files
- Release to Public

**ASSESSMENT**
Review Phase

- Guide to common Roper Center terminology
- Peer and environmental scan
- Metadata standards
- Reporting our findings
Project Recommendations

• Develop new processing and metadata production infrastructure
  – Develop DDI-compliant Ingest & Processing Unit
  – Combine processing teams
  – Develop integrated queue and tracking system
  – Document policies and processing rules
  – Extend support for AAPOR Transparency Initiative

• Develop formal Preservation Planning process
Implementation Phases

1. Core Ingest Unit
2. Merge of Processing Teams
3. Study Assessment Module
4. Acquisition Management Module
5. Workflow Management/Queue and Tracking System
Progress So Far

1. Developed Core Ingest Unit
   - Persistent Study ID
   - Study- and File-level metadata production infrastructure

2. Began merge of processing teams

3. Developed Study Assessment Module
Conceptual Design

Assess

Review in relation to Acquisition Policy

Determine if the Survey is already in the system or being processed

Cursory review to determine if Release has new questions

Check for missing components

Contact data provider

Components Received

Go To: Enter or Edit Study Level Metadata

Register Work Package in Processing Queue

Assign “Task Path” in Processing Queue

Assign Priority
Detailed Conceptual Design

What is the processing priority?

- In System
- New

Check for Study

Assessment Checkboxes

FAIL

Acquisitions Tracking

FAIL

Holding Bin

PASS

Question-Level Processing Queue

Archive Processing Queue

INGEST
<table>
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<th>Study ID</th>
<th>Study Title</th>
<th>Sample</th>
<th>Interview Start Date</th>
<th>Interview End Date</th>
<th>Organizations</th>
<th>Countries</th>
<th>Deposit Date</th>
<th>Last Updated by</th>
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</table>

Note: The table includes various studies' details such as Study ID, Study Title, Sample details, Interview Start and End Dates, Organizations, Countries, Deposit Date, and Last Updated by the user who submitted the data.
Add Study

Study Description

Study Title: Gallup Poll
Interview Start Date: 05/06/2014
Interview End Date: 05/09/2014
Deposit Date: 05/20/2014 02:16:54 PM
Organizations: Select Organization and Role

<table>
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<th>Organizations</th>
<th>Roles</th>
<th>Remove</th>
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</thead>
<tbody>
<tr>
<td>Gallup Organization</td>
<td>Primary Sponsor-</td>
<td>Remove</td>
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</table>

Source URL

Other Metadata

Check Study  Cancel
Study# 2014000167
Gallup Poll
Field dates: 5/6-5/9/2014

Assessment
Requirements
- Study meets Roper Center Survey Methodology Requirements
- Study meets Roper Center Metadata Requirements
- Study meets Roper Center Archives Permissions Requirements

Type Assignment:
- National
- For iPoll processing

Metadata Requirements
The following metadata are available:
- Survey Organization
- Sponsor(s)
- Interview Dates
- Type of Interviewing
- Geographical Region
- Type of Sample
- Sample Size
- Source/Name of Poll

Assessment Notes

Update and Continue
Are there files to be uploaded?

- Yes
- No

Submit
<table>
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<tr>
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<th>Size (KB)</th>
<th>Progress</th>
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<tr>
<td>Dunham_LIS445Presentation_2013-12-06.pdf</td>
<td>2078.05</td>
<td></td>
</tr>
</tbody>
</table>
Are there webpages (URLs) to be captured?

- Yes
- No

Submit
Study# 2014000167
Gallup Poll
Field dates: 5/6-5/9/2014

Status Summary | Assessment | Acquisition | Study Description | Methodology & Weighting | Related Files (0)

Assessment
Assessment for this study is complete.

Acquisition
No acquisition actions to report.

Metadata Status
Study metadata is incomplete.
Next Steps

• Upstream
  – Acquisitions Management Module

• Downstream
  – Metadata-driven variable-level processing interface
  – Workflow management/task paths
  – Quality assurance controls

• Preservation planning
Workflow Analysis Tips

• Bring in an outside expert
• Be comfortable with your dirty laundry
• Be open to change
• Change incrementally
Thank you!

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Like us on Facebook: www.facebook.com/ropercenter

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