Publication status

From issue #167:

First step (v0.1): Publication to the tool

Publication status milestone vocabulary

- Publication happens at certain Milestones. These can be either exchange steps or discussion related milestones where reports are required.
- The purpose of the vocabulary: A user should know which element has been published for which purpose(s). [1]
- Would also like to have publications in between milestones (No Milestone)
- The vocabulary should be easy to use, just two levels[2].
- The first preliminary version (v0.1) uses only the keys marked in green.

Publication status level	Milestone	Definition[3]
Not published		Elements and discussion made available for key members of a questionnaire design sub group, but not designed to be published internally
Internal publication		
	Designmeeting 1	Elements shared after first meeting to discuss questionnaire
	Designmeeting 2	Elements shared after second meeting to discuss questionnaire
	Designmeeting 3	Elements shared after third meeting to discuss questionnaire
	Earlytesting – SQP/TMT	Elements agreed for early pre-testing, export to SQP and translation
	PostEarlyTesting	Elements reviewed on basis of the results from the early testing
	Pilot – SQP/TMT	Elements agreed for pilot, export to SQP testing and translation
	PostPilot	Elements reviewed on basis of the results from the pilot
	FinalSource – SQP/TMT	Elements agreed as going into the final source questionnaire. (This will be the same as the one published externally, but good to have separately from the key of external

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[1] The table displays the full list of keys (draft version). The green fields should be contained in the list for the Step one version of the tool.

[3] Definitions adapted from document 'QDDT Discussion with NSD, Bergen 11/12 May 2016'+ input from Sarah later on

		publication as a survey programme might use only QDDT)
	NoMilestone	Use for publication of elements between key milestones
External publication	ExportToPublic_History	In addition to the final elements, the development history will be made - available to the public. The published development history might however be an edited version of the development process that is stored in the database.
	ExportToPublic	Elements agreed as going into the final source questionnaire.
	ExportToQVDB	Once finalized, elements will be exported to the QVDB to be made publically available

Publication page – v0.1

- Could be called 'Publication package' in the tool
- Publication icon on the right hand sidebar, leads to Publication page:

- Create new package: Add name and purpose
- How could the publication page look?
  Components:
    - o Name and purpose of the package
    - o Select publication status
        - o Two level controlled vocabulary
        - o Implementation similarly to the rationale code vocabulary.
    - o Select content for publication.
      This can be related to elements that the users are working with in a current module, or something else we would like to show or discuss.
    - o Several objects of different types can be chosen for the publication, for example one module and six additional questions. It should be possible to publish a specific version of an object.
    - o Add elements + button (see figure below).

- Find object versions to publish. Include search by element type using or logic. See table on p. 5 below for search options. Use Used as specified by as filter for the search if possible. It should also be possible to select elements from a list.
- Published object versions appear in content list, (similar as proposed for Sequence content).

- Implement version selection as currently exists for choosing QuestionItem versions in QuestionConstruct from the Content side of the page.

For elements where a specific version can be used, like QuestionItem and QuestionConstruct, it should be possible to select which version of the element to include in the current publication package

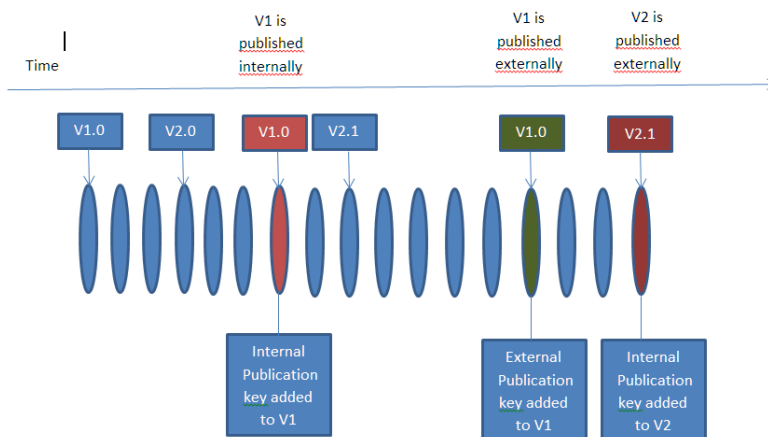| Element type	UsedBy	Search options (or logic)
QuestionnaireModule	Study	-Name -Description
Concept	Study Module	-Name -Description
QuestionItem	Study Module Concept	-Name -QuestionText
QuestionConstruct	Study Instrument Sequence	-Name of Question Construct -Name of referenced QuestionItem -Question text (of referenced QuestionItem)

Assignment of Publication status keys for metadata elements

When a package is published, the chosen publication status key should be automatically assigned to the element versions for publication included in the publication package, see 2) and 9) below.

For developers:

From issue #167:

1. In the current version of the QDDT each save results in a new revision. Each save can contain multiple changes to an element. Save types are 'work in progress', 'version', 'new-based on' and 'new'.
2. Some elements can be published. This applies typically to Modules, Instruments, Concepts, QuestionItems and QuestionConstructs/Sequences.
3. The publications can be internal or external and for different purposes (see below vocabulary).
4. Publication status codes (UserAttributePair in DDI) should be used to document the purpose of the publication of versions of elements.
5. Only business versions will be published, not revisions/saves of work in progress.
6. It should be possible to publish the same version of an element for different purposes (= add multiple publication keys over time for each business version).
7. DDI: An addition of a publication status key to an element does not trigger a new version of the object (administrative metadata).
8. Publication should be dealt with independently of the business versioning.
9. Along with 1), a save of a publication key to an element version will trigger a new revision of the object. This revision should now count as the (same) business version.
10. Saves of changes to content 'payload' metadata as work in progress should be avoided after an element has been published, as the element version then needs to be stable for reference.
11. Any saves of an element as work in progress or a new version that happens after the publication of a version should not 'inherit' the publication status keys of the former published business version. However, the same version can be published multiple times, for multiple purposes (see 5 and figure below).

Comments:

Publication status keys attached on the level of the published elements makes very much sense as you will be able to know by this stamp for which purposes a version of an element has been published, and if this has been published as an internal (development) publication or as external and final.

City writes: <It needs to be clear which question items/concepts made it into the "Final module", which into the "pilot module" etc. i.e. we will need to be able to distinguish fielded elements from those that may have been under consideration at one point but were never actually fielded to respondents>

Publication status keys attached on the level of the published elements is a good solution for this on the level of the version.

NB: By December 2016 UsedBy is agnostic and does not display which version has been used in each Study/Module etc. Without the publication status information attached on the level of the element version, it may look like elements versions published only internally have been used in earlier studies, for example.