Piloting surveys with GSIM
Plan

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Context
A long-term strategy: standardise and industrialise the survey production

→ A survey data collection platform in a metadata-driven approach

• Components developed
  - Design: questionnaire design tool
  - Build: questionnaire generator
  - Collect: CAWI platform for businesses surveys
    CAWI and CATI / CAPI platforms for household surveys
    PAPI management tool

• Standards used
  - GSBPM
  - DDI
  - VTL
Metallica: a project to pursue the long-term strategy

→ Standardise and industrialise the production of surveys

• How?
  – Use metadata and international standards beyond the data collection
    ▪ Collect: configure survey protocols, trigger collections events
    ▪ Process: implement the first steps
  – Evolve the data collection system
    ▪ Upgrade existing tools
    ▪ Build new tools
Protools: a new tool for the data collection system
Complex protocols for household surveys

E.g.: several modes and sub-cycles of collection and collection instruments

• Many tasks to implement the protocols
  – require data manipulations and transfers
  – involve many users and tools of the data collection system
A data collection platform based on isolated and weakly coupled services

- The data collection system must evolve: Service Oriented Architecture
  - Make sub-system communicate
  - Improve automation
  - Ensure consistency thanks to active metadata
Add an orchestrator: Protools
Protools: a solution for orchestrating survey protocols based on active metadata

The tool is based on formal modellings to:

• characterise surveys
• describe collection processes
• expose / fill in survey metadata
• trigger collection survey events
• monitor the triggering of events

→ Standards help to identify and define the necessary conceptual objects
Building Protools: GSIM approach
Our current description of statistical processes in RMéS

- We have used so far two GSIM objects
  - Statistical Program
  - Statistical Program Cycle

- As objects associated to quality reports
  - Implicitely with an yearly rythm

- We have no metadata to describe processes as required yet

- We need to go deeper into how we use the statistical program cycle in relation to complex processes

- With some complex protocols, it is difficult to identify the statistical program cycle
Issue of panel description with GSIM

- Example in the paper, the consumer survey
  - Rotative panel planned over one year with 12 monthly surveys
  - What is the statistical program cycle, the yearly process or the monthly survey?

- We present two alternatives in the paper followed by a discussion
  - A « cycle » for the yearly protocol and monthly surveys in the Business processes?
  - « Cycles » like monthly surveys, so there needs to be an object that encompasses these cycles (other than the statistical program)?

- The main question is "in the case of a longitudinal study (over time, with several studies) is it possible to consider the statistical program cycle as a group that contains several surveys"? If so, how can it be reported with GSIM?

- We will continue to work on these issues and welcome any comments
GSIM objects pinpointed

- GSIM is rich enough to provide useful objects.
- **Statics dimension: to characterise the main steps or objects of the process**
  - Business services, Process Steps, Business Functions. All of them tagged with attributes and administrative details
- **Dynamic dimension: to describe the sequence of steps**
  - Objects around the process design
    - Input (core, process support, parameter)
    - output (core, process execution log)
    - Methods (specification of the technique used in the process)
    - Rules (mathematical or logical expression)
Conclusion

- Except issues mentioned, GSIM is able to furnish relevant conceptual objects
  - for static requirements
  - for dynamic requirements
- We will be able to pinpoint GSIM objects as milestones to pilot processes
- Linking GSBPM GSIM document is great!
- In practice, technically, BPMN will be used, and BPMN objects will be tagged with DDI objects, GSIM objects or objects from the Core Ontology. Rules will be implemented with VTL
- First implementation of Protools during 2023
Thank you for your attention!
Any questions?