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Summary: Joint Usability and Assessment and Sociocultural Working Groups Meeting

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Summary

Joint Usability & Assessment and Sociocultural Working Groups Meeting May 1 – 3, 2012 Knoxville, TN

Documentation

DataONE Plone Site folder for all documents and epad links:

<https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg>
(notes below from these documents)

Six sub-groups:

- 1) Usability Testing, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/usability-testing>
- 2) Assessments, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/assessments-sub-group>
- 3) Policy Makers white paper, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/assessments-sub-group/Polymakers-Pres-DataONE-5-3-12.pptx/view>
- 4) Metrics and Statistics, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/metrics-and-statistics>
- 5) Communication, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/communications>
- 6) FAQs, Documentation, Environmental Scan, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/faqs-documentation-environmental-scan>

Cyber Infrastructure Update Presented by Bruce Wilson and John Cobb,

<https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/CI%20update%20for%20UA-SC%20WG%202012-05-01.pptx/view>

Day 1, Tuesday May 1st, Updates Since All Hands Meetings and Charges to WG Sub-groups for Joint WG Meeting

Block One

- 1) Welcome (Carol Tenopir), purpose and structure of meeting, and brief introduction to priority tasks (Mike Frame)
- 2) Introductions (Suzie Allard, Kimberly Douglass)
- 3) Update on DataONE since All Hands Meeting: roll outs, EAB, other DataONE WGs (Amber Budden)

Roll Outs:

- Web site is out (for a few months now) was coupled with move to production in mid May for CI some functionality has been increased from initial plan. This delayed release. We decided to enhance authentication beyond which was planned.
- o ONEMercury and other tools
- § Development environment
- § Sandbox environments – CI Team testing functionality
- § Staging environment = DataONE provides feedback, not public. This is where we are now.

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§ Production environment – Mid may anticipation

Production will be done quietly for a soft release to allow work with interface

One of the challenges has been integration of three coordinating nodes. Previous staging site was done off of one coordinating node. Now we are operating off. . . .

EAB:

Rosio Alvaraez had to step aside. Chris Greer is joining the EAB. The meeting is in November. EAB wants us to get as many MN's on board as fast as possible. Think about issues of quality and quantity. Some MN's will require help but others will be ready to go. Next meeting has not been scheduled.

Other Working groups:

EVA WG - met this month. EVA runs thematic projects per year. (3 meetings). The purpose of EVA is to showcase projects that are possible. their previous work (EVA1) was avian geo distribution. That project reached a close. This year's project is to highlight progress with iLMAB.

PPSR met 2 weeks ago - working on white paper, developed persona of project administrator, pre-meeting at ESA, they are still in initial stages of WG.

Community Engagement met later. is working on a white paper. They are working on an project administrator persona.

<http://dataone-sc.wikispaces.com/Personas> They would like to have a dataone blog. They also want to have a competition to develop videos on data management. "why data management?"

DUG meeting will be this Summer in Madison WI, co-located with ESIP.

Personas (Kevin Crowston)

bit/ly/D1Personas (<http://dataone-sc.wikispaces.com/Personas>)

Nothing much new except we have a proposed citizen science leader persona (from the PPSR group) note: a planning stage was added to the data lifecycle changed so we need some re-work. we also need to add discussion of planning to the scenarios.

Kevin: We would like feedback on how the personas are being used.

Goal for meeting: make needed editorial changes; think about a dissemination plan

Ideas:

- 1) Use personas as a means to talk about datanet interoperability
- 2) Kevin: also used personas as material from which to build posters to communicate more concretely
- 3) Suzie: I have been using them as I teach. They have been great as an instructive

Bob Sandusky: Our library just went through a program on electronic library's and how to reach current users.

Member Nodes subgroup (Kimberly Douglass)

Discussing issues of new member node stand-up. Put together a detailed outline that combined several pieces of information found at various points on the project web-site. We tried to synthesize the information, including links across the DataONE site in order to provide a cohesive document about the Member nodes

Found within <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/ahm-oct-2011/JA%20SC%20WG%20report%20out.pptx/view>

Metrics and Statistics Subgroup (Alison Specht)

Tier 1 member node: public data repository; public data only; no access controls; moderate availability level; uses Tier 1 API

Tier 2 member node: entry of authenticated user; log presence, use, responses of member node (including authentication), delivery of data

Tier 3 member node: authenticated user with write access to contribute datasets; public and restricted data

Tier 4 member node: responsibility to back up their own and possibly other Tiers' data

CCIT WG will review

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- 4) Demonstrations and discussion of latest CE products (Amber Budden)
 - a. New DataONE.org public website

Amber demoed the new website going over the following sections: Homepage, Participate tab, video, Products, Investigator toolkit, Communication page, software tools catalog, publications tab, member nodes,

 - The tab "Products" was questioned, as it seems as if there are more "resources" than products. AB--a nod to NSF, as here are the final products (which are the resources). Kevin: suggestion to do AB random testing of interface on the website to see if people click on links under "products" more or less than "resources"
 - Comments/questions: Who is the audience for the website? Where is the section/information targeting the question, from a scientist, "Why do I need this?", "What problem does DataONE solve for me?", "What can I do better with DataONE than without?" This issue added <https://redmine.dataone.org/issues/2685> in ticket tracking.. "We will help you not loose your data and then not get any future funding and die unhappy" i.e. we need a concise paragraphs of "why care" about DataONE perhaps for each persona.
 - b. Data Management Planning tools
 - Live online now, usability testing down through UVA
 - Metrics are being collected
 - Comment – publishing metrics about the usage of this tool may be useful to community
 - c. Tutorials
 - 14 modules complete
 - d. Documentation
 - challenge in communication between CE and CI (CI very busy getting release done), feedback delayed from CI on what CE has developed. One hesitancy is that the documentation will change as we move forward. CI will approve documentation two weeks AFTER live release.
 - Terms and Conditions doc - going to be reviewed and feedback provided, top of list for review, try to get out concurrent with or shortly after release.
 - = currently no FAQ right now. We know it's needed. Difficult to preemptively determine those questions. We've been compiling all the "contact us" questions we've been getting to help us with that. It's the soft public release that won't include this documentation, but it WILL BE THERE for the full public press release phase.
 - Geoff Bilder - how do we close the loop? how do we go beyond "recommendations" for best practices to "certifying" people as those who have done it right as per DataONE. What constitutes adherence to this? How do I audit an existing project? how do I prove that I'm doing my work according to these guidelines?. Researchers self-auditing and help to audit the repository. Repositories auditing other repositories.
 - "become a MN web page"--it is not clear. What does it mean to be a MN? What is the expectation? What are the requirements? (There was a procedural documents on a prior web site, but it wasn't carried over to the new site because the procedure may change as things are further developed). There should be a short paragraph on the site stating some of the answers to these questions.*

Block Two (John Cobb, Bruce Wilson)

- 1) Update on development and CCIT work
- 2) Demonstration of DataONE Cyberinfrastructure
- 3) Discussion of Cyberinfrastructure

May 14 is the current release point. URL - <http://cn-stage.dataone.org>
 Command line interface available for testing. Need Python.
 Documentation is thin - see URLs in presentation posted to docs area.
 Suzie is currently working on translating technical documentation into more general language for public posting to the website.
 Confusion about the meaning of accounts. Bruce reviewed 1) DataONE internal accounts (for project members), 2) In common identity federation for DMP Tool use (any google account works).

 - Testing is currently focused on the search portal, documentation and the identity portal
 - CI requests feedback on critical needs, what looks good and any errors or inconsistencies,
 - Bruce also discussed the bug tracking system, redmine and requested suggestions on how to manage the system better and track the suggestions. <https://redmine.dataone.org> Also gave suggested protocol for what to do if you have a bug to report.
 - Discussed a few known issues and demonstrated the current search interface

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Block Three

- 1) Briefings for subgroup topics: status to date and deliverables from this meeting
 - a. FAQs, Other Documentation and Environmental Scan of Institutional Policies (Suzie Allard)
 - b. Assessments group (Carol Tenopir, Ben Birch, Ellie Read)
<https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/assessments-sub-group/AssessmentsGroupReport5-1-2012.pptx/view>
 - c. Usability Testing (Mike Frame, Anthony Ahn, Mary Beth West)
<https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/usability-testing/UA%20and%20Socio%20WG%20-%20Usability%20Subgroup.pptx/view>
 - d. Metrics and statistics (Allison Specht)
https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/metrics-and-statistics/Metric%20-%20Stats%20pres_2.pptx/view
 - e. Effective Communication Across DataONE (Amber Budden and CI Representative and interested working participants) (see notes with report outs)

Deliverables and Report Outs

- 1) **Usability Testing**, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/usability-testing>
 - **Report of work**, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/usability-testing/UA%20and%20Socio%20WG%20-%20Usability%20Subgroup%20report%20out.pptx/view>
 - **Major Activities/Deliverables:**
 1. **Heuristic Analysis of DataONE.org and ONEMercury**, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/usability-testing/DataONE%20Usability%20notes%2020120502.docx/view>
 2. **Usability Analysis Strategy**, https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/usability-testing/DataONE%20UA%20Work%20Plan_strategy%20text.docx/view
 - **Usability test/script, approach, possible venues** <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/usability-testing/Usability%20Script%20-%20DUG%20ESIP%20July%202012.docx/view>

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- 2) **Assessments**, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/assessments-sub-group>
- **Report of work**, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/assessments-sub-group/AssessmentsGroupReport5-1-2012.pptx/view>
 - **Major Activities/Deliverables:**
 - **Draft Scientists and Educators Re-assessment**, https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/assessments-sub-group/copy_of_Scientists-and-Educators-Survey.docx/view
 - **New stakeholder groups for assessment**
 1. Institutional policy makers (Feb 2013)
 2. Publishers (March 2013)
 3. Graduate/undergraduate students (Feb 2013)
- 3) **Policy Makers white paper**, Guidelines for white paper and research paper by Kimberly Douglass and Theresa Pardo, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/assessments-sub-group/Polycymakers-Pres-DataONE-5-3-12.pptx/view>
- 4) **Metrics and Statistics**, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/metrics-and-statistics>
- **Report of work**, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/metrics-and-statistics/notes%20on%20use%20metrics%2003May2012.ppt/view>
 - **Major Activities/Deliverables:**
 1. **Metrics and stats presentation** – combines work from last six months plus diagrams, https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/metrics-and-statistics/Metric%20-%20Stats%20pres_2.pptx/view
 2. **Diagrams**, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/metrics-and-statistics/mn-and-cn-relationship-diagrams>
- 5) **Communication**, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/communications>
- **Major Activities/Deliverables:**
 1. **Communication Recommendations**, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/communications/Communication%20Rec%205.2.12.docx/view>
based on identification of communication challenges that DataONE is facing. PURPOSE: to provide SGWG/Executive team with some ideas to facilitate and enhance internal communication. WG members recognize (1) that DataONE communication is already on the right track but would benefit from improvement; and (2) any

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organization experiencing this kind of change and growth will be in the position to review and improve organizational communication. Amber will carry this forward.

6) FAQs, Documentation, Environmental Scan, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/faqs-documentation-environmental-scan>.

- **Major Activities/Deliverables:**

1. DataONE Five Principles, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/faqs-documentation-environmental-scan/D1%20Principles%205.2.12.docx/view>

to be submitted to the SGWG for review. Based on work from 2011 and responding to comments from Matt and Bill on the 2011 draft. Updated 5.3.12 Purpose: These principles represent what DataONE stands for or believes in. We felt they can be useful for elevator speeches, as a handy tool for conceiving marketing, to help guide some activities (for example our WG used it to prioritize specific tasks) etc.

2. Challenges and Trends, <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-u-a-sc-wg/faqs-documentation-environmental-scan/Challenges%205.3.2012.docx/view>

A short list of challenges and trends that DataONE should keep on its radar. This is a rough draft so content is not fully integrated. PURPOSE: To help DataONE leadership identify sociocultural considerations that are occurring/on the horizon during development/deployment/marketing.

Items for Sustainability and Governance

- DataONE should be at library professional meetings to advocate for new Member Nodes, even those that don't have repositories yet, but want to.
- Guides for how to integrate into the DataONE Communities and resource points.
(Bring this item to S&G discussion)
- DataONE Five Principles drafted by SCWG
- Communication recommendations drafted by SCWG
- Capacity of DataONE to address and respond to requests from/to be new Member Nodes.