Choose your own research data management guidance

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Title slide

- Good morning, my name…

- Recently I and my counterparts in 3 other institutions embarked on an adventure to explore new ways of delivering RDM guidance.

The adventure begins…

First

Over the course of the next 15 minutes I'd like to tell you all about it, and about the tool that we have come up with as a result. Specifically

- what set us off on this road;

- how we developed the tool;

- how researchers have reacted to the prototype;

- what our next steps will be to complete this particular mission.

Introduction

First

The end goal is to create an RDM Triage Tool as a joint resource for GW4 researchers. There is a lot packed into that sentence, so let me unpack it…

GW4 RDM Triage Tool

The idea of a triage tool is a loose comparison with the concept in healthcare and software bug reporting…

- Nurse in an emergency department checks how serious the case is; deals with minor issues there and then, makes sure other cases get seen in the right order.

- In software development, a bug triager looks at bug reports, filters out the invalid ones, and makes sure the others have enough information for the developers to diagnose and fix the problem.

Similar idea:

- Deal with the simple issues there and then.

- For more complicated issues, refer people to the right guidance and sources of advice.

GW4 Research Data Services Group

I should also explain about GW4.

- Vague pun on GWR, which served this part of the UK…

- Lots going on within the collaboration…

- RDS group meets a couple of times a year. This idea grew out of a meeting at the end of 2015 about training. It was an offhand comment that, when we stopped and thought about it, seemed like a really good idea.

Target audience

I've said that the target audience was researchers. We think it is more likely to appeal to early career researchers and PGRs, but it is the latter group we are targeting in particular. Several reasons for this…

Inspiration

So how did this all come about?

- We were remarking on the fact that data are diverse … right thing to do depends on many factors. Have to write guidance with lots of 'if then else' branches and turns … hit upon this idea of 'create your own RDM guidance'.

First

What we were referring to were the gamebooks that became popular in the 1980s and early 90s.

- Numbered passages

- After each one, it gave you some choices … number of the passage to read next.

- Many people could read the same book and each experience a different story.

Interactive fiction

- This is one species of the genre of interactive fiction.

- Many early computer games were written along the same lines: Colossal Cave (1976), Adventureland (1978), the Zork series (1980-2)…

- Even though the mainstream industry has moved on to graphical games, there is still a community of enthusiasts writing text adventures for the fun of it … Curses (1993), Anchorhead (1998), Photopia (1998) …

- Something of a revival in the area of smartphone apps.

- So there are quite a few specialist software solutions for writing IF. The idea of writing RDM guidance along these lines did not seem so crazy after all.

Development

Within the RDS Group, wrote a proposal, had it approved by the Librarians' Group, and proceeded to set up a working group to make this idea a reality.

Style of game

Our first decision was what type of game to go for: *parser based* or *choice based*.

- Parser games can be richer and more complex.

- Choice games are much easier to play and write … some people using the tool would be after an answer in a hurry, don't want to waste time learning how to interact with the parser.

Software to use

Narrowed it down to a choice of three systems.

- Twine is probably the system most commonly used for choice games. Twee2 is an unofficial command-line version.

- Squiffy is a much newer system with emphasis on simplicity.

Not much to choose between them, but went for Squiffy:

- Could be used without installing

- Could easily be version controlled on a service like GitHub

- Autosave could be useful if people come back with new questions

Planning and writing

We started this in May 2016. Came up with a list of questions that the tool should answer.

Organised them into sections. One way was to organise by the stage of research (planning, start up, execution, publication) but in the end we went with a standard set of thematic sections.

The next step was to get some content in there. Started with sections that were unlikely to have much variation … Experimented with various ways of doing things.

Then in July, we tried it out on the other members of the RDS group not directly involved in the development. Feedback:

- periodically clear screen instead of having long transcript

- don't ask people about their institution or funder unless we need to

- questions over level of detail

With that steer, we went on to write the rest of the prototype. Either Kellie or I would write a section, then everyone else would add their institution-specific guidance. By that time we'd run into the summer holidays and the start of term, so things went more slowly, but we plugged away at it and arrived at a working prototype just last month.

Demo

(Hope this works!)

User testing

Method

We are now in the process of user testing.

- Each user spends about 10 minutes with the tool answering a few RDM questions.

- We watch for things they struggle with and things they find easy.

- We also ask them to talk about what they're doing, and how they are reacting to things. Cf. advanced driving tests.

- Then at the end we ask them a few questions…

Results

To get participants, we put out calls via subject librarians, and asked those who had come to training courses or used the helpdesk.

To date we've had 12 responses from 3 of the 4 institutions.

As you would expect, we did get a few comments and reactions that were unique to a particular person, but I was quite surprised to find we did get some quite clear and consistent messages.

Good things:

- People were generally happy with the content coverage; the level of detail is about right.
- Most found they liked the tone of it (friendly, conversational, reassuring) …
- …the simple, uncluttered feel that did so well for Google …
- The thing that means we're on to something: nearly everyone said they would recommend it to others …

On the other hand, there was a consistent problem with navigation:

- Keenly missed Twine's undo feature
- But Squiffy's autosave progress feature was appreciated
- Some topics hard to find, e.g. DAS under 'Sharing'
- Some links open up text on the same page, others start a new page, others go to external sites.
- We'd designed it to answer one question at a time, so it didn't work as well when people tried to use it to explore the whole area at once.

There's one issue here that I'd like to think about in more depth, and that's about the traditional website navigation…

Just another website?

- It was a very loud and clear message that people wanted a breadcrumb trail or a set of menus by which to navigate. They missed the usual website elements of headings and a rigid hierarchy of defined pages…

- As soon as you do that, you stop having a conversation, and start having a website, but each institution already has its own website that it has to keep up to date. We don't want to set up another one just for the sake of it. That would be a senseless duplication of effort.

- So left with a quandary. It seems to me we either need to make the tool *more* distinct from normal websites, or abandon this particular idea and try to incorporate the good ideas within our existing online guidance.

- The thing that makes me want to persist with the tool is how this feedback came about. People were happy to drill down to an answer using the conversational approach, only reached for breadcrumbs when they wanted tackle a different question.

- Maybe the problem here is not with the idea but with managing expectations for how it should be used.

Value of the Triage Tool

I do see value in the Triage Tool as a complement to our existing guidance. There are things it does well that traditional websites don't, and vice versa.

- Our main guidance is full of ifs and elses, exceptions and usuallies. It's awkward to write and disconcerting to read. With the tool, we can probe the user's circumstances and give a straight answer. (Of course we mustn't oversimplify and tell people the wrong thing.)

- There are many ways you can carve up the issues, and websites (for practical reasons) push you to favour one hierarchy (e.g. by lifecycle stage). With a gamebook approach, it is all about pathways…

- Static text: have to choose a level of detail that treads the line between being obscure on the one hand and patronising on the other. Depends on the audience. With the Triage Tool, can cater for more people at once…

Value of collaboration

It not just one institution doing this, but several. Any advantage to this…?

- …important to keep right perspective: collaborative projects, researchers moving between institutions.

- …can see what other institutions are advising…reassuring if you don't spot any gaps.

- …other institutions may have put things in place to cater for needs that you have not been asked about, but may crop up any day now…
- …four chances that generic guidance will be updated…change of guidance at one institution may be a prompt for the others to review theirs.

And finally…

Next steps

(Slide says it all)

Conclusions

(Slide says it all)