UX Working Group Charter

Purpose

- Establish Dataverse best practices for user experience (UX) research and design of graphical user interfaces and APIs

- Establish mechanisms for conducting UX research to support design proposals and to evaluate existing Dataverse functionality and users' experiences

- Evaluate the Dataverse SPA Beta

Motivation

The Dataverse community seeks to grow its capacity to develop the Dataverse repository software in ways that support a greater variety of use cases, stakeholders and users, and to demonstrate a growing shared understanding of user and stakeholder needs and goals.

The number of unaddressed needs increases, signified in part by long-opened GitHub issues, code contributions in pull requests, calls to have this unformed UX working group help with existing projects, and by plans to iterate on features labeled as "experimental". One reason for this is because of uncertainty about how to ask and get answers to questions about the stakeholder and user needs that we hope to address. How do we know if a proposed or "merged" change – that is, a change to a released version of the Dataverse software – is an improvement? Who should be consulted?

As the open-source community is empowered to contribute code, plan events, and share resources in general, we need to empower more members of the community to contribute their experiences, research skills and access to different types of stakeholders and users so that we can:

- Engage a greater range of stakeholders and users in a cycle of design and assessment of the Dataverse software

- Standardize, as much as possible, the research and design practices that inform the development of the Dataverse software

- Share the research findings that inform the development of Dataverse in order to build on the community's shared understanding of the goals, needs, and pain points of its stakeholders and users

Participation & Roles

Who will participate in group and in which roles

Role	Group member
Member	Dieuwertje Bloemen
Member	Phil Durbin
WG lead	Julian Gautier
Member	Sherry Lake
Member	Vaida Plankytė
Member	Dimitri Szabo
Member	Jayanth Seshasai Komarraju

The group has also divided into three sub-groups to work in parallel on the working group's three priorities:

Topic	Participants
Improve guidance to contributors	- Dieuwertje - Dimitri - Julian - Phil - Vaida
Improve how Dataverse collects and distributes PIDs of people and organizations	- Dimitri - Julian - Phil - Sherry
Improve how Dataverse collects and distributes metadata about research objects related to deposits, such as related journal articles and datasets	- Dieuwertje - Dimitri - Julian - Phil - Sherry - Vaida

Deliverables

- UX Guidelines for Dataverse

- Research artifacts and recommendations for redesign of citation metadata block, controlled vocabulary plugins, and DataCite metadata export

    - See 📄 Proposal: GREI HDV and Dataverse Metadata Support

- Plan for regularly conducting secondary research to consider the results of UX research done by potential and existing users of Dataverse

- Plan for conducting primary research to regularly evaluate experiences more broadly, covering workflows that span multiple "features" and are experienced by different types of users

Timeline

Deliverable	Due date
UX Guidelines for Dataverse	December 31, 2024
Research artifacts and recommendations for re-design of citation metadata block, controlled vocabulary plugins, and metadata exports. See 📄 Proposal: GREI HDV and Dataverse M…	February 2025 (end of GREI year 3)
Plan for regularly conducting secondary research	
Plan for regularly conducting primary research	

Communications

How will members of the group communicate?

How WG members communicate should:

- Be something all members agree to

- Use include apps and software that members can adopt easily so that members can stay informed and contribute easily and in a timely manner

- Be as publicly available as possible so that non-members can stay informed about what the WG is working on

Current communication apps:

- Google Drive for documents, such as this charter and meeting notes

- Zulip streams:

    - For UX WG

    - For UX Guidelines for Dataverse group

Resources

- Draft list of projects the group might consider working on

- ResearchOps 101, an article about Research Operations, which "focuses on processes and measures that support researchers in planning, conducting, and applying quality research at scale"

- Surveying the Landscape: Use and Usability Assessment of Digital Libraries, a white paper published by the Digital Library Federation's Assessment Interest Group that describes the group's analysis done in 2016 of the landscape of use and usability studies conducted for digital libraries.

- Summaries of meetings with different types of stakeholders to assess the needs for and the viability of a Dataverse UX Working Group: https://groups.google.com/u/1/g/dataverse-community/c/2yHHP2MAFSI