

Instructions for JISC DepositMO project user test

Welcome to the user test of new tools for repository deposit developed in the JISC DepositMO project.

This document should provide you with all the information you need to perform the test, including access to the required services, tools and content.

* This document is intended for use in controlled tests, where users are provided with a computer for the test, or where some form of prior set-up is performed and on-site support provided.

In some controlled tests users will be asked to work in pairs to prompt them to express their reactions during the test to partners.

1 Why new deposit tools?

Today researchers typically produce new content such as reports, papers and presentations in digital form. A digital institutional repository is a good place to store, manage and provide access to this content, but can we make it easier for authors to deposit and update this content in the repository?

In principle the aim of deposit is simply to transfer a copy of the required content from the author to the repository. To support access and retrieval of content from the repository, and assist the administration of content, it is usually necessary to provide additional supporting information, or metadata, to describe the content as it is deposited.

Most repository software like EPrints has a native deposit interface, but it can be difficult to optimise the general deposit case and required metadata for specific use cases. This can result in what may appear to a new depositor to be a long and possibly off-putting deposit process.

Typically content is deposited in a repository to provide immediate access to other users. With new services currently being developed it is now possible to deposit and update in-progress work ahead of providing general access. These alternative approaches could involve deposit directly from authoring applications, such as a word processor, or file deposit directly from a file management tool such as Windows Explorer or Mac Finder. Such deposit might be supported with user-defined metadata.

What difference might such approaches make to repository deposit? What features will drive or limit uptake of these new approaches? These are some of the wider questions we seek to answer through this test. More specifically we are seeking to evaluate the usability, relative performance (speed) and impact (volume) of repository deposit using such tools developed in the DepositMO project.

2 Structure of the test

The following are the primary facilities you will be provided with for the test, on the desktop of the provided machine:

- Login to a demonstration (demo) repository server
- Word deposit tool - a downloadable application to add a deposit service to Word 2010
- Drag-and-Drop deposit tool - a downloadable script to provide a 'watch folder' for your file manager
- A folder of sample_data ready for deposit in the demo repository.

* For controlled tests the test computer will be pre-populated with these facilities and no downloading is needed.

3 Your test environment

This test may be performed in one of two environments:

1. A controlled exercise. You may be asked to work individually or in pairs.
2. Individual working using the instructions in this document. Telephone or email support may be available by prior arrangement.

In either case please note that any support is only intended for specified setup processes, not for the deposit element of the test. It is important that support does not affect or influence the outcomes of the test.

Please remember, we are testing and evaluating the tools and processes, not you or other users.

4 Results of the test

The outputs of your work in the tests will be recorded in three ways:

- Your answers to questions provided in this document
- The content and metadata in your personal demo repository
- For observed tests, notes by observers

Where reported, results will be presented anonymously.

5 Your background

Before we begin we need to know something about your prior experience of depositing content in a repository. This will help qualify our analysis of the results of these tests.

1. *Have you deposited content in an institutional repository?*
2. *In which repository do you deposit most?*
3. *Do you deposit content regularly? Approximately how many items have you deposited in this repository? Over how long a period have you been depositing?*
4. *What type of data have you deposited: research papers, presentation slides, images, video, research data, other?*

6 Initial setup

Support can be provided during this part of the test.

Demo repository

1. Open a Web browser (e.g. **Google Chrome**).
2. Proceed to the demo repository at <http://depositmo.eprints.org/>
3. Login to the demo repository using the username and password provided.

This should take you to the Manage deposits screen shown in Figure 1 (if not, click on Manage deposits). You should now have an empty repository ready for your personal use. You may be familiar with the interface if you have used an EPrints repository before.

The screenshot shows the DepositMO / Swordv2 EndPoint Manage deposits screen. The top navigation bar includes links for Home, About, Browse by Year, Browse by Subject, Browse by Author, Manage deposits (which is highlighted with a red circle), Manage records, Profile, and Saved. Below the navigation is a search bar. The main area is titled 'Manage deposits' and features a 'New Item' button (also highlighted with a red circle). There is an 'Import from' dropdown set to 'Atom XML' and an 'Import' button. Below these are checkboxes for 'User Workarea', 'Under Review', 'Live Archive', and 'Retired'. A table lists one item: 'UNSPECIFIED' (Last Modified: 17 May 2011 10:38, Item Type: Article, Item Status: User Workarea). To the right of the table are icons for edit, delete, and other actions.

Figure 1. Demo repository screen showing Manage deposits view and highlighting New Item button

Word deposit tool

We will run through this process when we open the first document.

Drag-and-Drop file manager deposit tool

1. Open the **depositMO** shortcut found on the desktop. This is a file manager, which opens within a depositMO folder and shows a CONFIG file and a 'watch folder'
2. Click the watch_folder to open it. This will automatically start a script in a new window. Leave this window without closing it.
3. Click to open the CONFIG file and check that it shows your username and password for the repository. If not, edit these items directly in the text editor (use e.g. Notepad if prompted) displaying this text and 'Save' the updated text. The purpose of this is to direct deposits to your personal workspace in the demo repository.

Test content

For the purposes of the test procedure we are providing a folder of content. Later in the test there will be a chance to work with some of your own content.

If you open this **sample_data** folder from the desktop you will see it includes:

1. doc1-cloud (a short conference paper)
2. image1-archaeology
3. pdf1-ecda-confpaper (a short conference abstract/paper)
4. doc2-profiles (a journal paper)
5. image2-Bath Abbey
6. doc3-missing paragraph
7. image3-Bath River Avon

In addition, we hope you have brought some of your own content that you wish to deposit in the repository.

For the security and privacy of your own content

For the purposes of the test you are allocated a personal workspace on the demo repository. Content deposited in this workspace can only be viewed by you and by some administrators (in this case, the test moderators). Only if you formally click on the 'Deposit item' button for the item in the repository will it become publicly visible. This is a standard button in this type of repository. It is not intended for use in this test and is not recommended if you wish content to remain private.

All content deposited in personal workspaces on the demo server will be deleted from the server *once all tests and analysis are complete*. Please note this may be some time after the date of your test.

7 Time to start depositing some content

By now you have set up the drag-and-drop deposit tool, you have some content, and you are logged in and ready to deposit something in the demo repository.

Support and assistance is not available for this part of the test, except to clarify the instructions given here.

If you are working in a controlled group you may be observed during this process. Both your actions and comments may contribute to the results. Again, we should stress the results from this test are intended to inform about the tools rather than the users, so don't be shy of commenting. You may make comments to the observers, but during this part of the test they are unable to engage in dialogue. If you are working in a pair your discussion may be helpful in providing recordable evidence for the results.

Deposit item 1

From the **sample_data** folder open doc1 in Word. Now we have opened Word we can use the deposit tool that has been added to Word. First we will check the setup of the tool.

- Open the DepositMO (alpha) tab and 'show' the user panel (Figure 2)
- In the panel ensure that Repository location is set to <http://depositmo.eprints.org/id/contents>
- Set the panel to your correct login details – same username and password as your repository login.

Using the panel, 'Submit' the document to the repository. Go to your Web browser with the demo repository open, and click on (or reload) Manage deposits (Figure 1) to see the content you have just deposited. How is it described? Could you improve the description?

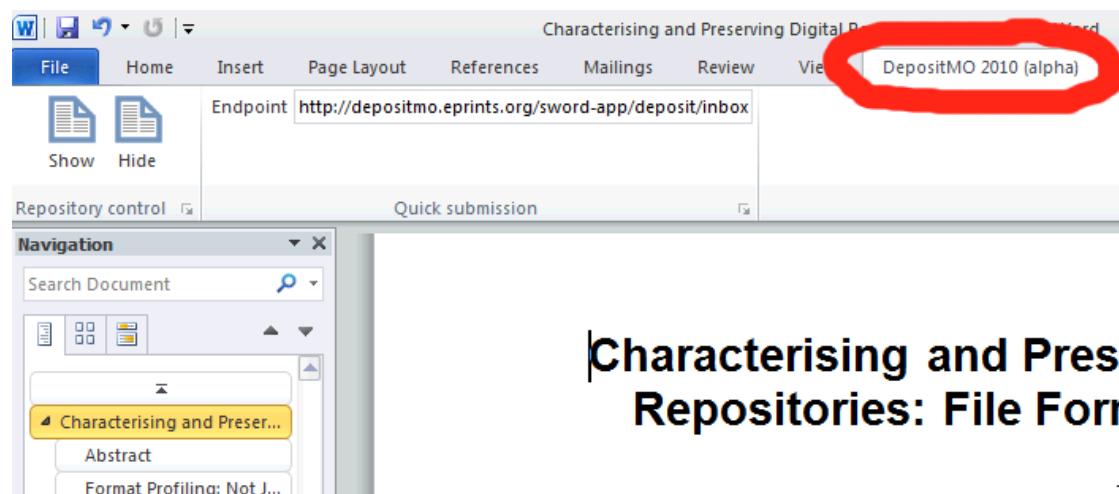


Figure 2. Revealing the control ribbon in Word 2010 for the deposit application

Deposit item 2

This time we will use the file manager tool, which we set up earlier. Find image1 in your **sample_data** folder. Copy this file using the short-cut keys for your machine. Return to your **depositMO** folder on the desktop, and add a new content folder (name it as you wish). Using the short-cut keys, paste image1 into the new content folder. The tool should now automatically deposit the copied image into the repository.

Open the new content folder and you should see two new files appear: VIEW_ITEM.html and (after another 10s or so) METADATA.xml. Clicking on VIEW_ITEM.html will take you to the repository, showing the record for the item you just deposited. Open the METADATA file by right-clicking and selecting a text editor (e.g. Notepad) to show the editable metadata extracted from the file for the repository. Add a title by including this line (e.g. just above <author>):
<title>Archaeology image</title>
Then 'Save' the file.

Again, click on Manage deposits in the demo repository to see your current list of deposited items. You should see an item listed with the title you just added.

Deposit item 3

We want you to deposit pdf1 using the standard repository deposit interface. From your Manage deposits screen in the demo repository, click on the New Item button (Figure 1). Deposit item 3 in the usual way using the EPrints interface.

Hint. After clicking the Choose File button browse to the sample_data folder via Recent Places. When adding metadata using the deposit form you only need fill in the required fields to complete the deposit.

Deposit items 4, 5

You have used both new deposit tools and the conventional repository deposit interface. Now deposit the next two items (doc2, image2) in your **sample_data** folder, using the deposit tool you think is most appropriate.

Hint. If you copy to the **depositMO** folder you may wish to set up a new content folder for each item deposited.

Short pause. At this point please ask the observer or test moderator to take a screenshot of the Manage deposits list in the repository window.

Moderator's note. We need a time check here, before some of the items are updated and the Last Modified time changes. How long did it take to deposit each item up to this point? Timings are a rough-and-ready indicator of the ease and speed of the different deposit processes.

Updating a document

In this case we want to update the content of doc2, which you have already deposited.

Open item 7 (doc3) and copy the paragraph of text. Return to doc2 in Word – unless you closed this it should still be open in a separate window. Paste the copied paragraph where indicated in doc2. ‘Update’ the document in the repository using the appropriate button in the panel. In this way the updated document should *replace* the original.

Updating an item

This time we want to update an item in the repository by adding another image of Bath (image3) to the item containing image2. Unlike the case above, we are not replacing the original content, and the updated item should display both images.

Hint. You will need to return to the **depositMO** folder but in this case you do not need to set up a new content folder. Instead add the latest image to the appropriate folder among those you have already set up.

Depositing your own chosen items

Did you bring your own content? Given an open choice, what content do you want to be able to deposit in a repository? As with items 4 and 5, deposit your content using the appropriate tool.

Improving description

Your Manage deposits view of the repository should now contain a reasonably extensive list of contents, but can you tell which is which? Is each item sufficiently described for identification by you, or for discovery by others?

8 Concluding views: your experience of the test

If you have been working in a pair you may each provide an answer to these questions.

Would these tools encourage you to deposit more of your own content in a repository?

Would these tools encourage you to deposit types of content that you have not previously deposited in a repository? Which type?

Which of the two new deposit tools (in Word, and in the file manager) used here are you likely to use if it was generally available?

How would you improve either of the tools?

Are there features of the new deposit tools that would deter you from using them for repository deposit?

Or are you more likely to continue to use the standard repository deposit interface?

Any other comments?

What happens next?

We will be running a series of these tests during June, and some followup tests later in the year. The results will be reported among the outputs of the project. If you wish to hear about these outputs you can subscribe to the project blog <http://blogs.ecs.soton.ac.uk/depositmo/> or follow us on Twitter @depositMO. We will keep in touch with you through your test moderator.

Thank you for your participation in this test.