EaaSI Research Activity:
Soup to Nuts Simulated Workflow

May - July 2019

Purpose:

The purpose of the exercise:

- Revisit your Software & Collection Inventory and Scenarios for Use & Access to determine **if** those software cases/examples are still the cases/examples that you want to configure and test in EaaSI.
- Uncover and respond to critical decision points in a typical configuration workflow.
- Continue testing of network and configuration functionality in the EaaSI system.
- Identify gaps in current EaaSI user documentation

Instructions:

Please respond to the short answer questions provided for each step of the workflow.

1. Review your Software & Collections Inventory and Scenarios for Use & Access from Fall 2018.
    a. Determine if the items/use cases you identified are still the items/cases you want to prioritize for configuration in testing in EaaSI.
    Q: If not - evaluate and reflect on how your prioritization criteria have changed. How would you modify your current collection development or repository policies to reflect your software prioritization criteria?
    b. Select 2-4 items to configure and test in EaaSI.
    Q: What did you select to test?
2. For each item selected, begin by completing the GREEN FIELDS (pre configuration) metadata spreadsheet provided here to the best of your ability with existing documentation (including research!). These fields generally cover system requirements and other contextual information necessary to choose or create a relevant environment.
Q: Typically some research is required for these fields. List your sources for this information. Roughly how long did you spend researching information for these fields?
3. Determine whether or not there is an appropriate base environment already in EaaSI.
    a. If no base environments are available for any of your items, contact the EaaSI team.

    i. If installation materials are available, team members will coordinate the configuration of a compatible base environment for your test cases. If not, please select an alternative test case.

Q: Reflect on this process: Were there base environments for the items you selected? If not, and you contacted the EaaSI team to configure a base environment, how complicated/complex was the request process? How long did you have to wait? How could this request process be improved? How do you think these requests should be managed at scale, with many more potential nodes in the network?

4. When enough information has been gathered to select a base environment, import the item into EaaSI and mark it as "Software". (See "Importing an Object" and "Adding Software" instructions from the EaaSI User Handbook)
   Q: Was existing EaaSI documentation sufficient to complete these steps?
5. Load the item into your selected base environment, install, and save a new environment.
   Q: Did installation proceed as expected? Were there any hidden dependencies encountered only discoverable via emulation?
6. Re-open the saved environment and complete as much of the BLUE FIELDS (post configuration) as possible. These fields cover details about the *configured software* (language, file formats, filesystem location)
   Q: How could this step in the process be improved? Was it challenging to find the descriptive values corresponding to these metadata fields in the saved environment? Did you know where to look? How could documentation or guidance for this step be improved for future configuration staff that may be asked to participate in this work at your institution?
7. You may also find new details about the GREEN FIELDS only discoverable during emulation (from README or INSTALL documents, e.g.). Update the pre-configuration section of the spreadsheet as well as you go, if applicable.
   Q: How could the EaaSI interface assist or ease this step?
8. Recruit one-three users (these can be other staff in the library that have not been part of EaaSI testing so far) and ask if you can observe them searching for and opening your new environments. As them to complete 1-2 tasks in the (or each) environment. This step should follow a simplified "user observation" protocol where users talk through each step as they are doing it, and the EaaSI Node Team members observe what they do and where they run into pain points. To be clear - this "user observation" is not for configuration users (which was the focus of the EaaSI testing protocol that you all completed in April) - this is for end users.
   Q: What user observations or behaviors stood out? What questions did your users have? How would you improve on a lightweight testing protocol for end-users in order to begin educating internal stakeholders on the relevance of EaaSI to their own research/practice?
9. Report any issues encountered with EaaSI network or configuration functionality to the EaaSI GitLab bug tracker.
   Q: Please provide your general observations about this start-finish workflow simulation. A few things to consider overall: Where were the gaps in the documentation along the way?; Where do you feel these steps integrate easily into existing workflows and which steps stand out in

terms of time?; What additional testing protocol or other resources would be useful in demonstrating EaaSI to other internal stakeholders?