**SUI - 2015-11-13 Personas**

**Agenda**
- General thoughts
- Personas
- Vision and project timeline

**Resources**
- Google Hangout via Columbia University
- Proto-personas
- Persona Scratch Pad (Google Doc)

**Notes**

**Attendance**
- Peter Binkley (University of Alberta)
- Ben Howell (University of Michigan)
- Anna Headley (Chemical Heritage Foundation)
- Sue Richeson (University of Virginia)
- Simone Sacchi (Columbia University)
- Michael Tribone (Penn State)
- David Trujillo (University of California San Diego)
- Gary Geisler (Stanford University)

**General Thoughts**
- Good experience with making the user personas within our organizations
- What’s a PI? (Principal Investigator) The person who is in charge of the grant project, not necessarily the one doing the research.
- The vision for Sufia is that it would function for a wide variety of users
- Different dashboards for different users (configurable or modular dashboard elements)
- Possible plugins for added functionality within an institution
- Wish for control of metadata form fields with works and collections (admin?)
- Lesson Learned from traditional content management systems: Users often have different roles and administrative privileges and the system should be general or configurable enough to accommodate those differences in roles and needs.
- What is the dream for PCDM functionality?
- Figshare - [http://figshare.com/](http://figshare.com/) - Displays a core set of metadata for general users
- Is it possible to mitigate or get rid of lengthy forms in the upload process? (It could be a pain point for users)
- What if uploads automatically harvested file data and created metadata?
- Common fields in metadata that are auto-suggested
- Common Metadata
  - Title
  - Creator
  - Etc.
- Specialized Metadata
  - Institutional based fields
  - Project based fields
- We can have data remediation and process metadata completion over time
- Interface could incorporate feedback about the completeness of metadata
  - we don’t want to permanently shame researchers for having metadata completeness at 40% either

**Personas**
- Although our institutions have many kinds of users, for the purposes of our group charter, it would be good to come up with 5 or 6 personas
- What is the overlap in the Sufia UI personas and the conversations about users on slack?
- Personas may include an intelligent agent executing large batch uploads
- Institutional customization of uploads, dashboard, etc.
- What is the general or basic user’s experience of the Sufia Interface?
- Sue would like to have the administrator persona in the mix (someone who can oversee content & collections within an institution)
- The proxy depositor is important, often the person interacting with the interface
- Faculty and Graduate Depositors are closely linked to each other
- Are there other overlaps in the personas?
- For users that create small objects the current design is good
- Users that may create very complex objects might not have an easy time with the current interface
• Need for a matrix showing interactive roles and affiliation with the institution
• The deposit section is a critical part of Sufia
• The admin or user dashboard is another critical part of Sufia
• Admin and casual user dashboards could be very different in scope and intention (viewing viewer statistics only to complex permissions and multiple proxy authorizations)
• Our clients are those who care deeply about the details in their data but they need to be able to add that data when and where they want

Vision and Project Timeline

• How can we divide & conquer the work ahead with personas?
• Functionality Matrix (below)
• Once we have the Matrix we can look at the general user flow
• Ben will upload his version of the user flow before next Friday (Nov.21)