# Storing user research data: a guide

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| This guidance covers how we manage user research data within Service Transformation. We do this to protect participants’ privacy and follow the law. We also recommend how other teams within the council should manage user research data.  [Browse our collection of user research templates and guides](https://github.com/essexcountycouncil/ur.templates-and-guides/)  [Give your feedback](https://forms.office.com/Pages/ResponsePage.aspx?id=TzK0qFwVFUKg8X7YzJqZL6WVp1s6mnpBki5NxERIs-JUM0g3VktVVDBXSjMyUEhRVkJXU1g1Q0VNUCQlQCN0PWcu) and help us improve this guide. |

## How we store research data

To store research data securely we:

* keep it in places Essex County Council has approved for storing personal data
* restrict access to data to those who need to use it
* prevent colleagues from copying and downloading research data

## Where we store participant data

We store participant data, including contact details, in our internal [user research repository](https://essexcountycouncil.sharepoint.com/sites/ur-repo/). You will need to request permission to access the repository.

We do this so we can:

* minimise the number of people who have access to the data
* reduce the likelihood of raw data being added elsewhere
* delete data once the project ends
* pick up a piece of research if a team member is on leave

## Research participants lists

List of participants should be labelled as ‘research participants’. This helps us to find and delete personal information.

For projects with multiple studies, alongside each participant we list the study they took part in.

## How we structure the user research repository

To create a project folder quickly, copy the [templated folder](https://essexcountycouncil.sharepoint.com/:f:/r/sites/ur-repo/Shared%20Documents/Project%20name?csf=1&web=1&e=g7hx2R). You will need to request permission to access this folder.

When creating a new folder, we label it with the:

* project name, product or service
* deletion review date

If the project has multiple phases, we create a sub-folder for each phase of the project.

Where a project has multiple studies, we label each study with a meaningful name that will make sense to other researchers.

A study folder contains:

* consent forms in a dedicated folder
* recordings in a dedicated folder
* the research participants list
* a link or signpost to the deliverables or work in progress
* any other related documentation that includes personal data

The full naming convention may appear as:

Project name [Review: mm/yyyy]> Project stage (if more than one) > [Study meaningful name]

## How we manage research data

We manage research data from the moment it's created until it is no longer useful.

To do this we:

* transfer research data to the user research repository as soon as possible
* keep participant consent with our research data – we cannot keep the data if we do not record consent
* delete data from the devices we used to collect it, which includes laptops, One Drive, MS Forms and third-party applications like Optimal Workshop
* only share data with colleagues who participated in the research and remove their access once analysis is complete

If we have consent from participants, we may also share data with third party organisations involved in the development.

## Where we store research artefacts

We store research artefacts in the corresponding project channel on SharePoint or the Service Transformation site. Artefacts can include:

* user stories
* user journey maps
* research reports
* personas

So other researchers can find project artefacts, we link to the project folder from the user research repository.

## How long we keep research data

We keep data while a project is in progress.

For small studies, we delete files 6 months after project finishes. For multi-phase projects, we review files every 6 months and aim to delete files after one year.

We may keep data longer if there are ongoing queries related to the data, or if the project will progress to Alpha or Beta.

# Guidance for other teams managing user research data

Follow the [GDS guidance on managing user research data](https://www.gov.uk/service-manual/user-research/managing-user-research-data-participant-privacy) as much as possible.

## Storing participant data

Create a folder in SharePoint for:

* documents containing personal data, like participant contact lists
* raw insight which could link back to a participant, such as interview notes
* signed consent forms

## Decide who has access to participant data

Share nothing in your participant data folder publicly. Only people in your project team should have access to this folder. This should be agreed at the start of your project. Let participants know who has access to their data and include this in your [consent form](https://forms.office.com/Pages/ShareFormPage.aspx?id=TzK0qFwVFUKg8X7YzJqZL6WVp1s6mnpBki5NxERIs-JURVQ5N0JDUTM1Rk5LRDJCTVdLM0NPNDRQUiQlQCN0PWcu&sharetoken=xqz94NhQuGOC50sGUWwO).

## Deleting participant data

When creating a folder, add a date to the end of the folder name to show when to delete the data. For example, “Raw insight/participant data [Review 12/2022]”.

The deletion date will depend on what information you’re collecting.

We recommend keeping data for 6 months and no longer than one year. You should delete participant data sooner if it is not needed anymore.