Trilogue Table Editor

EP - Council  
Exchange Tests Summary

October, the 13th 2016

# Introduction

In March 2016, at a meeting of Business Representatives of the European Parliament and the Council, it was decided that both institutions will run an internal feasibility analysis on an automated exchange of content of Trilogue Tables. The decision to enter into analysis followed a prior internal study at the Parliament of a possible Trilogue Table editor design.

The document that follows describes the preparation, the study process as well as the main outcomes, followed by an executive summary.

# Methodology

Following the March meeting a methodology was agreed in between operational teams at the two institutions. It was based on a principle of User Tests, where staff gets an access to a mock-up of a system design with hands-on experience of Trilogue Tables editor.

Each participant was given a set of three task each, equal for each participant. Users were asked to evaluate the system design as if it were a live system, with test supervisor intervening only when boundaries of the system simulation were reached or if users would give up on the task, considering it too difficult or system design inadequate.

**The scenarios** tried to evaluate system design in three areas:

1. Initial document creation and exchange,
2. Sending an exchange following an update,
3. Receiving and managing update done by the other participating party.

As each scenario uses interactive system simulation, it allows users to project many use cases that otherwise would not come up. Users are encouraged to share the line of though on the entire design, usually providing some invaluable insights.

If a particular system feature causes users to stumble, or unknowingly take a wrong decision that particular feature is evaluated in between test sessions - often resulting in an improved system simulation. This approach allows to design iteratively, concentrating first on major features requested by Business Owners and building a system design that is functional to the most users.

Both operational teams at the EP and the Council remained in contact in preparation to the User Test sessions and during major discoveries to align possible design solutions.

# EP User Test sessions

At the European Parliament a total of **16 Test Sessions** took place, with a wide variety of committee staff, representing both Assistants and Administrators. Following the methodology the users were not guided during the tests, but were encouraged to use all the information contained in the screen and email design that were provided.

The design have been iterated several times in the process attempting to resolve the biggest hurdles users were encountering. The Council operation team was informed of the major design weaknesses found, and the results of the updates to the design.

A series of improvements were introduced to the steps needed to prepare a new exchange, the email confirmations of the system as well as the EP internal content sharing among all the parties involved inside the Trilogue Table edition cycle.

## EP User Tests results

Following the initial design updates and subsequent tests it has been confirmed that **in-editor Trilogue Table exchange is acceptable by the users**.

One of the Business Requirements - **a notion of Formal / Informal versions** did not cause confusion and in some cases clarified the purpose of a version/exchange. These two flags seemed to be **intuitively understood by the users**.

Users found **quick access popup-style tooltips** enumerating purpose of the new design elements bringing a much needed clarification. No user manual was necessary during the User Tests sessions, especially the later design was found to be self-explanatory.

**Version Compare screen has been developed from scratch during User Tests - following user feedback**. It allows to compare any two versions of a Trilogue Table, including incoming ones that have not yet been accepted. Various presentation options have been included.

**Internal EP Sharing**, though not of interest to all users, **solved majority of use cases** for users that seemed to be interested in communicating exclusively with the new tool. The later versions of the design clearly introduced a notion of a document owner that has a full access control that was relatively easy to understand for uninitiated users. The team used existing design patterns of online, multiuser text editors to solve the ownership visibility and access control.

**Sending and Receiving an exchange has been redesigned and nested inside an Exchange Wizard**. It now uses progressive disclosure pattern, unveiling to user options related to smaller steps - avoiding options overload at the start. Especially preparing a new Exchange required to master few new concepts, now each comes with its own purpose description and all are grouped in three discreet steps.

## EP Subjects for further study

The Analysis confirmed most of the initial expectations and allowed to polish the current designs. Additionally it pointed to some other areas that have not yet been considered in details, and may be focal points for some opinionated users.

**Change Authorship Attribution** - there are no clear solution designs at the moment how to pinpoint, present and maintain the presentation of the initial author of any proposed change. This may be important for files where team driving the negotiations would strictly keep track whose position (and wording) has been accepted for each row or groups of rows.

This presents a further opportunity to develop a feature set that could not be available in MS Word, additionally highlighting benefits of the structured editing approach.

**Comments (joint)** - while there is a provision for comments in the current design, and the analysis did not go to the level of editing details, majority of users had various questions, comments and observations regarding how comments should behave. This was to be expected, as at the moment comments can serve several purposes - depending on the Trilogue Team and its internal setup. Regardless of how comments are used - they are central to communication in between Trilogue Table users. This point should be considered by all institutional parties participating in the project.

**Presentation Persistence (joint)** - structured Trilogue Table Editor comes with a promise of content independent presentation. In many use cases that opens up a door to a new way of treating information contained in the document that previously was not easily accessible. However, it leaves one possible problem on the table that should be tackled - same file presentation for technical and trilogue meetings. The system, while maintaining flexibility, must ensure that meeting-presentation configuration is passed to the other parties during the exchange.

# Council User Test sessions

{{ council.trilogue.test.summary }}

# Executive Summary

The Exchange Analysis that was requested in March 2016, and carried out in summer 2016, following the User Test methodology has confirmed that Trilogue Table Exchanges - encapsulated directly in an editor - are welcomed by the users.

During the analysis, it became apparent that there is an overwhelming user support to build a fit-for-purpose tool for the work on the Trilogue Tables and the exchange and discovery of the content. This mostly points to weaknesses in the current setup that is limited by file-based exchanges of MS Word content, where users are personally responsible for maintenance of every aspect of the table.

Automatic presentation persistence frees users to concentrate on work that brings the most Business Benefits - changes to content of the table. Filtering, allowing a dynamic presentation of any subset of the content, eases content discovery that in turn can translate into a better worded compromise. Consolidation available at any moment of the process also helps to build a more legally sound compromise.

Automated content versioning allows each institution to design internal archiving processes following own specifications. A concise, email based, internal system of notifications keep users informed of major state changes to a Trilogue Table and maintains the sense of control that the users had with file-based MS Word process.

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Following the exchange feasibility analysis and an early feature set confirmation in both participating institutions, the Business Responsible of the process will look at an appropriate setup for the IT project that would follow on the early positive outcome.

An attempt should be made to help transition current MS Word based legislative process, including Trilogue Tables, into an open structured format that would allow to build new, previously unavailable services.