Trilogue Table Editor

EP - Council  
Exchange Tests Summary

October, the 13th 2016

# Executive Summary

1. Trilogue Table editor started as an internal feasibility study at the European Parliament and a part of Better Law-making initiative, with a common inter-institutional goal of improving the way the EU legislates. The initiative calls for a new agreement among the EU institutions to make cooperation smoother - with this in mind an initial joint study on Trilogue Table exchanges was commissioned by the European Parliament and the Council.
2. The joint Trilogue Table content exchange study was carried out by the European Parliament and Council’s teams in summer 2016. It has confirmed validity of the structured editing approach and an early Trilogue Table editor design.

During the analysis, conducted following the User Test methodology, it became apparent that there is an overwhelming user support to build a fit-for-purpose tool for the work on the Trilogue Tables which overcomes the major weaknesses of the current file-based exchanges of MS Word files where users are personally responsible for maintenance of every aspect of the table.

1. Many newly designed features resonated well with users. Among them:
2. *Configurable presentation* - changes to a table presentation do not alter its content. Content and presentation become two independent elements.
3. *Tagging and filtering* - enables trilogue technical staff to aggregate and call onto a screen any section of the table based on user defined criteria.

1. *Consolidated text preview* - compromise text or any other column can be previewed in a consolidated mode at any moment. Work can also take place in a consolidated text mode - with updates automatically carried over to the compromise column.
2. *Any-to-any column comparison* - any two or more columns can be compared, ad hoc, with differences displayed following user criteria.
3. *Versioning* - system embraces automatic, and user defined, versioning of content - allowing to present negotiation progression and facilitate future archiving solutions.
4. *Role based access security and controlled exchange* - system mimics and enforces current usage patterns of current file-based edition system, while transiting to a new generation of technology.

Users considered these points a definitive added value, and we believe the resulting system would ease the technical burden and introduce a simpler and controlled way of editing. The editor would take over many mundane tasks, automating document structure and maintain presentation. This would enable users to focus on content for the Trilogue negotiations, leading to a more legally sound compromise.

1. Users warmly welcomed the proposed Trilogue Table Editor design. However, it represents a major breakthrough from the current working patterns. To ensure continuous user acceptance and the success of our initiative, we need to carefully manage the change and adopt a sound communication strategy at all levels: project team, steering committee and business sponsor.

The ongoing good collaboration between EP and Council teams must be carried over to a structured governance that would continue with the involvement of all the internal stakeholders when the project is started.

1. We recommend to follow up on this initial study and to embrace the new structured editing technology to build a new generation of editors for legislative content. The EU co-legislators should continue their collaboration, refining and validating the feature set with the strong involvement of users, and promoting the Better Law-making objectives throughout the design and implementation process.

# 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 their thoughts 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 designs of screens and emails that were part of the simulation.

The design have been updated 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 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 that **quick access popup-style tooltips** helped with understanding the new design elements, bringing a much needed textual clarification. No user manual was necessary during the User Tests sessions, especially the final 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: a) select or create new version, b) select transmittable parts, c) confirm & send.

## 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, on 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 in the open that should be tackled - same file presentation, for technical and trilogue meetings, for all participants. The system, while maintaining flexibility, must ensure that meeting-presentation configuration is passed to the other parties during the exchange.

# Council User Test sessions

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