Accio Data
managing collaborative projects with free tools

Jennifer Arnott : March 2013 LibTech Conference
jen@modernhypatia.info : http://modernhypatia.info

Presentation goals:
- Useful tools for large, complex projects. (Some you know, some you may not.)
- Tips for the human part of collaborative projects.
- Specific quirks of lengthy projects, massive data, and varied sources - and how to manage them better.

Our case study:
Short version: we have lots of data to manage and some challenges in managing it.

Longer version: Alternity is a 7 year collaborative project (currently halfway through year 5) based on an alternate universe of the Harry Potter canon. It's one part role-playing game, one part collaborative story, and one part deconstruction of the Harry Potter world. We use an online journal site (Dreamwidth) with the journal posts characters make appearing on the site.

- 12 current player authors from across the US (3 timezones)
- 72 played characters and ~1500 named background characters, plus various businesses, books, music groups, and much more.
- Wide variety of technology tools (computers, mobile devices, and everything in between)
- Range of player-author comfort with technology
- Some limits on feasible tools (free to end-user, multi-platform)
- As of the end of February 2013, we have 6000+ posts, 45,000+ comments, and something like 250 readers (it's hard to count all of these, for various reasons.)
- For more about the project, see the "Alternity Intro" document at http://modernhypatia.info/accio-data/

Technology considerations:
- We have a massive amount of data to manage (Existing canon. Game canon. Background discussions.)
- Players have different levels of comfort with different tools, and we use a wide variety of devices to access the game and resources (including mobile tools)
- Technology evolves over time - what we had in Year One has changed! Some previously stable tools are no longer as reliable as we'd like.
- Data portability is a concern.
- Cost - we don't use any tools that have a required end-user cost.

The journals themselves are hosted on Dreamwidth (http://dreamwidth.org) a fork and subsequent development of the LiveJournal code. Some characters have paid accounts for additional benefits.

Email lists: We began on a Yahoo!Group (http://groups.yahoo.com). In the fall of 2012, we transitioned to an independently hosted mailing list (using the open source software Mailman) after Yahoo had repeated issues with significantly delayed messages.

Challenges:
- Delayed mail would not be a problem in some settings. For us it is, because our conversations can move fast.
- 400-900 messages a month can feel overwhelming to players.

Tips and tricks:
- We moved our list, but to maintain complete archives, we send a copy to Yahoo as well. (This involved some fiddling on the part of our tech goddess.)
- Regularly review how communication is working (4-6 months is good for us)
- Be clear about who's doing followup on off-list discussions.

Databases: We use both Yahoo and Google Drive. (http://drive.google.com)

Challenges:
- Yahoo limits to 1000 items in a table (we've had to split our adult background character database), 10 fields, and a single search criteria.
- GoogleDocs allows much more nuanced filtering, but anyone filtering in spreadsheet view affects all other viewers. List view (View menu) is a bit more limited, but can be used without affecting others.)
- There's just a lot of data, and we have more coming every week. Any system has to be sustainable and manageable for end-users. (As much as possible.)

Tips and tricks:
- Your ideal group is at least ¼ people who actually like messing in the complicated data. (This way, you have some backup, even if a couple of people do most of it.)
- Plan extra time at points when more data is likely to come in (for us that's the beginning of the school year and around really major plot events.)
- The more you can standardise terminology for filters, the better off you'll be. (Periodic checks are good on info you edit/add regularly)
- Pick things that are easy to type (and easy to spot visually) for your most common terms. Good term planning saves you from later misery.

Index: Currently using GoogleDocs, I want to swap into a wiki in the not too distant future.

Challenges:
- Having detail can bog things down. We want consistency, but too much cross-checking feels like work. People can feel constrained.
- Immensely time-consuming to do (I average 2 minutes a post.)
- Hard to know what you're going to want to index when you're starting.

- Assuming that people remember the details of what they did 2+ years ago is not a safe assumption.
- The wiki will make some things easier (cross-linking to specific pieces) but also increase the amount of time it takes to process each week's summary.
- More than about 8-10K words in a doc gets harder and harder to manage.

Tips and tricks:
- Have a clear process. (Our process involved initial rough sorting, a more detailed indexing, and then a final pass to clean things up. Then the eventual wiki.)
- Be clear on what you're indexing where: it does not need to be the most perfect solution, it just needs to be workable. (The perfect is the enemy of the getting-stuff-done.)
- Have a weekly checklist, and review regularly to find the stuff that catches you up.
- Have a holding space for random topic you might want later but don't know where to put it. (This is my Misc document, which turns out to be my favorite to skim.)

Calendars: Also now on Google - we use multiple managed calendars. They include calendars for the class schedules of our main characters, as well as a couple of general calendars for birthdays, major events, etc.

Challenges:
- Too many details can bog some player-authors down!
- The problems of canon

Tips and tricks:
- Careful labeling and color coding helps.
- So does separating data so that people don't need to see everything.
- We also have a master spreadsheet document for the class schedules, so we can filter/sort by teacher, subject, day of week, year, etc.

Family tree:
- Interrelationships turn out to matter.
- Most family trees assume you want to connect to reality.

Timelines:
- Timeline software is fiddly, and doesn't handle scope the way we'd like. (Lots of points, varying amounts of data, some dates very close together, some far apart)
- We've moved to using GDoc spreadsheets for much of this data. (it's rough, but it largely works)

Some other tools:
- Our characters play chess better than their players. http://www.chessgames.com
- Overall weather patterns: http://www.whatstheweatherlike.org
- Pinterest (http://pinterest.com) for some visual images.
- Spotify (http://spotify.com) for character playlists to write by (inexpensive, not free)
- Star Walk (iPad app) for looking at the stars over Scotland.

Technology tips: general
- Keep it sustainable. Work now that saves work later is worth doing.
- You will have kludges. Figure out which ones you're okay living with.
- Look for places you can optimise.
  - http://tinyurl.com to create typeable links especially for unwieldy GDoc links.
  - GDoc widget in Gmail to open things from my main email/chat window.
  - internal bookmarks between sections of long documents.
- Checklists are your friend.
  - Atul Gawande's *The Checklist Manifesto* (http://gawande.com/the-checklist-manifesto) is very helpful.
  - For the weekly docs updates I do, I use a checklist in http://todoist.com where I can import the template each week (and edit it easily.)
- Foresee some things:
  - Technology will change. Not always the way you thought.
  - Exportability is a good thing. (Don't be held hostage to your data)
  - The cloud is great for collaboration, but it can be fragile.
- Figure out your personal workflow (I work best with multiple visible windows and many many tabs. This drives other people up a wall.)
- Memory is fallible. For any long-term project, find tools that help you support your memory. To-do programs, reminder notes, documentation.

Group dynamics:
- We need and want diverse preferences, interests, and approaches to make the game work, but balancing them can be complicated.
- Being clear about our goal helps a lot (a story progressing in a general direction.) So does building up trust in each other's desire for the game to be awesome.
- Build for ebb and flow (both time, attention, spare brain cells). Build redundancy.
- Determine your point for actual fixed decisions (for us, it's "when it appears in game" - anything before that is mutable.)
- Recognise that people's lives shift, sometimes very unpredictably. Don't assume that a lack of response is about you.
- Don't spring things on people that involve their time and energy. It will make them cranky. (We're all often up for spontaneous. Totally unexpected is not so cool.)
- Be aware of what other people's Things are. Everyone has Things that make them cranky, or that rub them the wrong way. A long term project probably can't avoid hitting these sometimes, but knowing that you might helps a lot.
- Regular events that leave everyone going "Hey, that was awesome" help a great deal. Recognising that we're doing this nifty thing, and it has value.
- Recognise the awesome stuff people do - this doesn't have to be a big deal, but a "Hey, I really like that idea" or "That post really made me think." or whatever goes a long way. So do fan comments.