

Workshop Handbook

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Welcome

The UB & ITS collaborate on workshops aimed at working with data and software in line with Open Science and FAIR Principles. As our collaboration grows closer within and between workshops, this Handbook is being developed as a common reference that consolidates information on how we develop and organize these workshops.

Part I

WORKSHOPS

Ongoing Workshops

As of Academic Year 2023-2024, we are providing 7 *standard* workshops/e-learnings.

Research Data

1. Quickstart to Research Data Management
2. Getting Started With Yoda
3. Getting Started With Virtual Research Environments

Research Software

1. Introduction to R & Data: [course website](#) / [GitHub repository](#)
2. Introduction to Python:
3. Writing Reproducible Manuscripts in R & Python: [course website](#) / [GitHub repository](#)
4. Best Practices in Writing Reproducible Code: [course website](#) / [GitHub repository](#)

Before

This section provides an overview of what needs to occur while planning workshops for the upcoming academic year.

Jaarplanning

Before commencing the with the jaarplanning, the department should decide on which workshops will be offered (or not) and who will be involved in the workshop as leads and instructors/helpers. This would likely be decided during the Annual Review.

Workshop Agenda

By the end of May, we should have the jaarplanning for the next academic year ready.

When doing this jaarplanning, we should take the following into account:

- the *frequency* of the workshop,
- the *preferred days* for the workshop,
- the *number of participants* for the workshop,

Moreover, the workshops should be *spaced out* well, so we don't have weeks that are too busy or vice versa.

Here is an example of the workshop agenda for 2023-2024: [RDM Support -> General -> Training & Workshops -> Workshop Communication Materials -> workshops-planning-2023-2024.xlsx](#)

Title	Date: Day 1	Date: Day 2	Weekday	Time	Location
Quickstart to RDM	04-09-23		Mon	13:00 - 15:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)
Programming Cafe	07-09-23		Thu	15:00 - 17:00	Living Lab, University Library (Utrecht Science Park)
Introduction to R & Data	12-09-23		Tue	09:00 - 17:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)
Getting Started with Yoda	18-09-23		Mon	13:00 - 15:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)
Best Practices in Writing Reproducible Code	26-09-23	27-09-23	Tue&Wed	09:00 - 13:00	0.21, University Library (City Centre)
Programming Cafe	05-10-23		Thu	15:00 - 17:00	Living Lab, University Library (Utrecht Science Park)
Introduction to R & Data	10-10-23		Tue	09:00 - 17:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)
Introduction to Python	19-10-23		Thu	09:00 - 17:00	Tielezaal 1.25, University Library (City Centre)
Writing Reproducible Manuscripts in R & Python	24-10-23		Tue	09:00 - 12:00	0.21, University Library (City Centre)
Quickstart to RDM	30-10-23		Mon	13:00 - 15:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)
Programming Cafe	02-11-23		Thu	15:00 - 17:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)
Introduction to R & Data	07-11-23		Tue	09:00 - 17:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)
Getting Started with Yoda	13-11-23		Mon	13:00 - 15:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)
Best Practices in Writing Reproducible Code	21-11-23	22-11-23	Tue&Wed	09:00 - 13:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)
Programming Cafe	30-11-23		Thu	15:00 - 17:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)
Introduction to R & Data	05-12-23		Tue	09:00 - 17:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)
Introduction to Python	14-12-23		Thu	09:00 - 17:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)
Writing Reproducible Manuscripts in R & Python	19-12-23		Tue	09:00 - 12:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)
Quickstart to RDM	08-01-24		Mon	13:00 - 15:00	Bucheliuszaal 6.18, University Library (Utrecht Science Park)

Room Booking

We need to book locations for all the workshops in advance. This can be done via the the booking system or by contacting colleagues in *Publieksdiensten* (probably not called the same now after the reorganization).

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Outlook Calendar

When the jaarplanning is done, put it in an Outlook calendar that can be shared with everyone.

The image shows a calendar application interface. On the left, there are two monthly calendars: 'januari 2024' and 'februari 2024'. Below these is a 'My Calendars' list with 'RDS Workshops: 2023-2024' selected. On the right, a detailed weekly view for 'januari 2024' is displayed, showing days from Monday to Wednesday for each week. Events are listed in green boxes, including '13:00 Quickstart to RDM', '09:00 Introduction to R & Data', and '09:00 Best Practices in Writing Reproducible Code'.

You can use the Excel sheet from the jaarplanning to create calendar items in bulk. Here are two links for reference:

1. <https://www.techrepublic.com/article/how-to-import-excel-records-into-an-outlook-calendar/>
2. <https://www.auditexcel.co.za/blog/import-excel-appointments-into-outlook-calendar/>

After that, you can choose to either share or publish your Outlook calendar:

- <https://support.microsoft.com/en-us/office/share-your-calendar-in-outlook-com-0fc1cb48-569d-4d1e-ac20-5a9b3f5e6ff2>

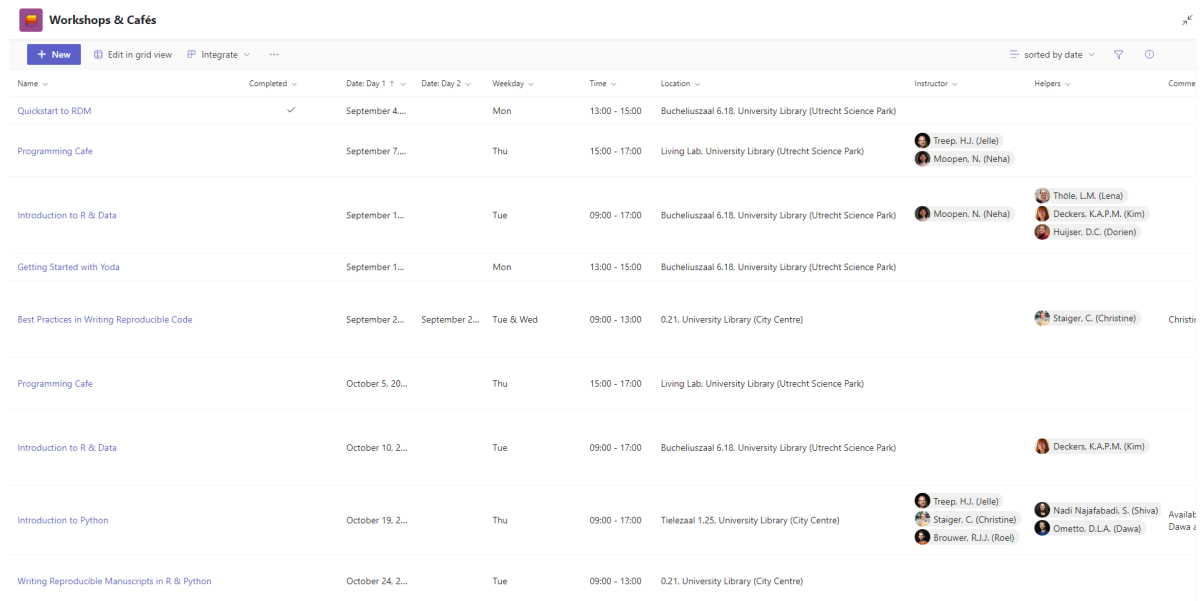
Sign Up Sheet

Also make a page where people can sign up or simply report who will be going.

May be redundant with the pool of instructors and helpers but might still help maintain overview. Maybe sign up for the whole academic year / commit to one workshop and then figure it out within your team. To be discussed.

Here is a link to the sign-up sheet for 2023-2024: [RDM Support -> Team Code and Software -> Workshops & Cafes \(tab\)](#)

The Excel sheet can also be used as a basis for creating this sign-up sheet tab, you don't have to create entries separately.



Name	Completed	Date: Day 1	Date: Day 2	Weekday	Time	Location	Instructor	Helpers	Comments
Quickstart to RDM	✓	September 4...		Mon	13:00 - 15:00	Buchelliuszaal 6.18, University Library (Utrecht Science Park)			
Programming Cafe		September 7...		Thu	15:00 - 17:00	Living Lab, University Library (Utrecht Science Park)	Teerp, H.J. (Jelle) Moopen, N. (Neha)		
Introduction to R & Data		September 1...		Tue	09:00 - 17:00	Buchelliuszaal 6.18, University Library (Utrecht Science Park)	Moopen, N. (Neha)	Thole, L.M. (Lena) Deckers, K.A.P.M. (Kim) Huijser, D.C. (Dorien)	
Getting Started with Yoda		September 1...		Mon	13:00 - 15:00	Buchelliuszaal 6.18, University Library (Utrecht Science Park)			
Best Practices in Writing Reproducible Code		September 2...	September 2...	Tue & Wed	09:00 - 13:00	0.21, University Library (City Centre)		Staiger, C. (Christine)	Christi
Programming Cafe		October 5, 20...		Thu	15:00 - 17:00	Living Lab, University Library (Utrecht Science Park)			
Introduction to R & Data		October 10, 2...		Tue	09:00 - 17:00	Buchelliuszaal 6.18, University Library (Utrecht Science Park)		Deckers, K.A.P.M. (Kim)	
Introduction to Python		October 19, 2...		Thu	09:00 - 17:00	Tielezaal 1.25, University Library (City Centre)	Teerp, H.J. (Jelle) Staiger, C. (Christine) Brouwer, R.J.J. (Roel)	Nadi Najafabadi, S. (Shiva) Ometto, D.L.A. (Dawa)	Avalat Dava i
Writing Reproducible Manuscripts in R & Python		October 24, 2...		Tue	09:00 - 13:00	0.21, University Library (City Centre)			

Website

The following folder contains (per workshop) all the texts for landing pages, agenda items, Formdesk forms and confirmations, pre- and post-workshop emails: [RDM Support -> General -> Training & Workshops -> Workshop Communication Materials](#)

There is also an Excel sheet to track the review and update of materials:

Workshop	Discovery		Registration			Before The Workshop	After The Workshop	
	Landing Page	Agenda Item	Formdesk registration	Browser Confirmation	Email Confirmation	Pre-Workshop Email	Post-Workshop Email	Post-Workshop Survey
Walk-In Hours and Workshops (Landing Page)	checked	NA	NA	NA	NA	NA	NA	NA
Tailored Workshops (Landing Page)	checked	NA	NA	NA	NA	NA	NA	NA
Getting Started With Yoda	checked	checked	checked	checked	checked			
Introduction to Python	checked	checked	checked	checked	checked			
Introduction to R & Data	checked	checked	checked	checked	checked			
Privacy Basics for Researchers	checked	NA	NA	NA	NA	NA	NA	NA
Programming Café	checked	checked	checked	checked	checked			
Quickstart to RDM	checked	checked	checked	checked	checked			
Best Practices in Writing Reproducible Code	checked	checked	checked	checked	checked			
Writing Reproducible Manuscripts in R & Python	checked	checked	checked	checked	checked			
Walk-In Hours for Research Data & Software	checked	checked	NA	NA	NA	NA	NA	NA
Write Your DMP	checked	NA	NA	NA	NA	NA	NA	NA

Figure 1: RDM Support -> General -> Training & Workshops -> Workshop Communication Materials -> workshops-planning-2023-2024.xlsx

Landing Page

Review the landing page text for all workshops. Lilli makes template and the workshop leads do the reviewing (primarily of workshop description/content, the more admin stuff will be generic).

Example of landing page for Introduction to R & Data: <https://www.uu.nl/en/research/research-arch-data-management/training-workshops/introduction-to-r-data>

The landing page is a generic description of the workshop and includes an overview of all workshop dates with link to the specific agenda item.

- prerequisites
- what you can expect (or not)
- UU and UU-affiliated only
- costs
- deregistration and no-show/dropout policy

Note that a Dutch translation will be needed as well.

Agenda Items

The agenda item is specific to a workshop date/occurrence and includes the link to the registration form.

Example of agenda item for Introduction to R & Data: <https://www.uu.nl/en/events/introduction-to-r-data-may-2024>

Note that a Dutch translation will be needed as well.

Formdesk

How to handle waitlists? Maximum number of participants? Maximum number of waitlisted participants?

Formdesk Form

The Formdesk registration form is largely the same for all workshops. There are generic questions related to registration, but a couple of specific questions per workshop.

Make sure that the werkstudenten ensure only UU and UU-affiliated addresses are accepted for registration! Provide a list of these addresses (UMCU, PMC, etc.)

Here is a link to the default questions for Formdesk at the moment: [RDM Support -> General -> Training & Workshops -> Workshop Communication Materials -> _formdesk -> default-questions-formdesk-registration.docx](#)

Browser Confirmation

This refers to the text that appears in your browser when the registration is confirmed. It points to info.rdm@uu.nl as contact point in case a confirmation email is not received.

[RDM Support -> General -> Training & Workshops -> Workshop Communication Materials -> _formdesk -> default-questions-formdesk-confirmation.docx](#)

Confirmation Email

This refers to the email that participants receive when their registration is confirmed. It points to info.rdm@uu.nl as contact point and includes a personalized link for deregistration.

[RDM Support -> General -> Training & Workshops -> Workshop Communication Materials -> _formdesk -> default-questions-formdesk-confirmation.docx](#)

We might want to consider putting the pre-workshop email in the Formdesk confirmation email already?

Werkstudenten

Once all the documents have been reviewed and/or updated, have the Communicatie werkstudenten put everything online. They can be contacted at: werkstudentCC@uu.nl

It can take them up to a month to process everything for a whole academic year. We naturally want to prioritize the workshops from September-December, so people can already start signing up for that.

Some things they should do: number of participants, UU & UU-affiliated addresses, specify the owners and co-owners for the form, notification if it's registration less than 7 days.

It would be helpful to give them a briefing of instructions like in this document: [RDM Support -> General -> Training & Workshops -> Workshop Communication Materials -> briefing-work-students.docx](#)

New

- We need a TIMELINE for the jaarplanning and coordination – when do we wanna schedule big group meetings, review moments, determine leads
- Create a TASK BOARD for workshops if we think it's useful.
- List the workshops + e-learnings we want do/maintain next academic year. Determine what to do with stuff that might be phased out (if at all). You might archive it for example.
- Determine the leads of these workshops, as well as a pool of instructors and helpers per workshop. Clarify and agree on what these roles mean and involve (and not).

During

This section provides an overview of what needs to occur during the academic year as we go through the planned workshops.

Communication

Q&A

Any Q&A or communication about the workshops should go through TopDesk. The workshop leads are responsible for picking up calls related to their respective workshops. Any other calls can be picked by the workshop coordinator or the team member monitoring TopDesk that day, depending on what is required.

Waitlists

Currently, requests to be waitlisted for workshops are directed to TopDesk. The workshop lead should:

- place the call under their name
- set the due date to one week before the workshop
- send a response acknowledging the waitlist request (TODO: make a template)

Pre-Workshop

Pre-Workshop Email

The pre-workshop email should be sent out *one week* before the workshop is to take place. The email should be placed within an Outlook appointment. The workshop lead has primary responsibility for this.

The following folder contains (per workshop) all the texts for pre- and post-workshop emails: [RDM Support -> General -> Training & Workshops -> Workshop Communication Materials](#)

TODO: review pre-workshop email in general, but also include deregistration reminder and no-show/dropout policy.

Catering

We are currently arranging tea and coffee ourselves. If a budget for catering is arranged, the workshop lead will need to book the catering at least ≥ 3 days before the workshop is to take place.

Workshop

During the workshop, we distinguish between *Instructors* and *Helpers* in terms of our role for that day. The *Instructor* is responsible for teaching: they are at the front of the room and go through the slides and demos. The *Helper* is responsible for walking around the room and supporting participants during the workshop, especially during the exercises. These are not fixed roles, we expect colleagues will take turns with a different role every time a workshop takes place. For those who are new to the workshop, it may be helpful to be a *Helper* for a couple of rounds before picking up the *Instructor* role.

It's helpful if at least 2 colleagues arrive earlier to open the room and help set up the space.

We also want to take attendance during the workshop to keep our numbers up to date: *registrants*, *deregistrants*, *attendees*, *no-shows*.

Start the workshop with a round of introductions. End the workshop with necessary closing information.

After the workshop, it may be helpful to have an informal discussion on how the workshop went. Feedback can be exchanged and questions can be answered. If there are action points, the workshop lead can pick them up or make GitHub Issues if needed.

Post-Workshop

Post-Workshop Email

The post-workshop email should be sent out as soon as possible after the workshop, ideally the very next day but not later than 1 week after the workshop. The workshop lead has primary responsibility for this.

The following folder contains (per workshop) all the texts for pre- and post-workshop emails: [RDM Support -> General -> Training & Workshops -> Workshop Communication Materials](#)

TODO: The workshop lead should update the Excel sheet tracking workshop-related numbers, i.e. *registrants, deregistrants, attendees, no-shows*.

Quarterly Review

Pizza Party

The workshop coordinator will organize a Quarterly Review, hopefully with pizza to discuss how things are going.

Post-Workshop Survey

The post-workshop email contains a link to the post-workshop survey. The survey is hosted on Qualtrics and a report can be derived on a quarterly and annual basis to evaluate workshop-related feedback from participants.

After

This section provides an overview of what needs to occur towards the end of the academic year, as we get closer to wrapping up all the workshops.

The ‘timing’ of activities in this section will overlap with those associated with planning for the upcoming academic year, but they serve different purposes.

Annual Review

During the Annual Review, we reflect on the year as a whole and what we might want to do differently in the upcoming year. In addition to evaluating the pre- and post-workshop surveys and our experiences in general. The following decisions can be made:

- which workshops will be provided the next year
- who will comprise the sub-team for each workshop
- who will be the workshop lead
- what are the action points and to-dos that need to be carried out as part of the jaarplanning
- what is the planning/timeline towards implementing the action points
- what is needed from everyone to develop themselves and have a good time teaching the workshops

Workshop Materials

Maintenance

After the last workshop has taken place, all associated materials should be archived on Zenodo.

- Workshops related to *data* are typically PowerPoint presentations. These should be uploaded to Zenodo, along with a pdf copy.

- Workshops related to *software* have materials built with Quarto and hosted on the Utrecht University GitHub organization. The repositories on GitHub should be integrated with Zenodo first and a ‘release’ of the repository should be made on an annual basis. Zenodo will detect the release and automatically archive it.

Development

Teams for each workshop are encouraged to get together and work on updating / developing the materials further. If colleagues switch between workshops to one that they are not familiar with or if we have new colleagues, this can be an opportunity to get started with the workshop ‘onboarding’ process until the first workshop actually takes place.

Custom Workshops

- We currently have a small paragraph for custom workshops at: <https://www.uu.nl/en/research/research-data-management/workshops>
- TODO: a separate landing page for the custom workshops with a gallery/portfolio (links to Zenodo or GitHub) showing examples of custom workshops we have done?
- Requests for custom workshops should be directed to the workshop coordinator via TopDesk.
- The workshop coordinator will bring the request to the team and we will decide if we can do it and who will do it.
- If the workshop can be carried out, the workshop coordinator will link the contactperson with the colleagues who are picking it up. They will also check with the contactperson about how they found out about us and our offering.
- If possible, the post-workshop survey should be distributed to the attendees.
- After the workshop, the colleagues will report back to the workshop coordinator with the number of attendees.
- The colleagues will FAIRify the workshop materials on Zenodo and provide the link to the workshop coordinator.
- The workshop coordinator will update an Excel sheet with the following information:
 - The name of the workshop
 - The contactperson (name, email, faculty, position)
 - How the contactperson found out about us and our offering
 - The names of colleagues who gave the workshop
 - The number of attendees
 - The link to the FAIRified workshop materials

E-Learnings

1. Learn to Write Your DMP
2. Privacy Basics For Researchers

New

- We need a TIMELINE for the jaarplanning and coordination – when do we wanna schedule big group meetings, review moments, determine leads
- Create a TASK BOARD for workshops if we think it's useful.
- List the workshops + e-learnings we want do/maintain next academic year. Determine what to do with stuff that might be phased out (if at all). You might archive it for example.
- Determine the leads of these workshops, as well as a pool of instructors and helpers per workshop. Clarify and agree on what these roles mean and involve (and not).
- Do a jaarplanning where all the workshops are spread out evenly, at a frequency that suits everyone and on preferred days.
- Book locations for the workshops.
- Create an Outlook calendar for the workshops and share it with everyone.
- Create a sign up sheet where people can add themselves as instructors and helpers. May be redundant with the pool of instructors and helpers but might still help maintain overview. Maybe sign up for the whole academic year / commit to one workshop and then figure it out within your team. To be discussed.
- Review the landing page text -> Lilli makes template and leads do the reviewing (primarily of workshop description/content, the more admin stuff will be generic)
- Review the agenda item text. -> see above
- Review the formdesk registration form / LOBBY FOR LIBCAL OR SOMETHING BETTER / LIMIT registrations based on email
- Review the formdesk browser confirmation and confirmation email.
- NEW: consider putting the pre-workshop email in the formdesk confirmation already???
- Have the werkstudenten put everything online.
- DOUBLE-CHECK: make sure only UU and UU-affiliated addresses are accepted
- REVIEW: HOW TO HANDLE WAITLISTS??? Max number of participants? Max waitlists?
- Review templates for pre-workshop emails -> provide a template and review
- NEW: consider sending outlook appointment with pre-workshop email?
- NEW: no-show and drop-out policy
- NEW: Propose catering budget for coffee and tea - > LEAD should book the actual catering
- Review templates for post-workshop emails
- NEW: finish automating survey report (Formdesk + Qualtrics combi)
- NEW: plan quarterly/biannual evaluation moment

- NEW: update all workshop materials to Quarto website instead of book?
- NEW: provide template and instructions for Quarto website.
- NEW: how to align non C&S workshops for similar look and feel? I would say make single page website with the slides embedded..
- Double-check repos for integration with Zenodo for DOI
- NEW: align ongoing workshops with less visible workshops like VRE and HPC etc. Anything from ITS
- NEW: make a workshop portfolio page including data stuff, software stuff, UB, ITS, e-modules...separate section for links to custom workshops in the past -> talk to ML
- NEW: decision making process for starting new (standard) workshops, ending ongoing workshops, timeline, materials
- NEW: decision making process for providing custom workshops -> also admin like number of requests, attendees etc.
- NEW: one off workshops for the joy of it before making it standard (summer school / winter school for example)
- NEW: decision making process for e-module development and maintenance
- NEW: formdesk vs. LibCal?