DMPonline user group, IDCC, Amsterdam, 23rd February 2016

The user group meeting held at IDCC focused on options for building locale-aware support into DMPonline to facilitate use of the tool in different contexts e.g. different countries, institutions, projects or disciplinary groupings. Participants represented different viewpoints covering each of these groups.

Four main questions were discussed:
1. What is the range of locales for DMPonline instances?
2. Which features of DMPonline need to be customized for specific locales?
3. Which data do we need to share/exchange across locales?
4. Who should customize DMPonline instances for specific locales?

The slides used to frame the discussion are available online[1] and background details can be found in the associated technical note on developing locale-aware support.[2]

What is the range of locales for DMPonline instances?

Discussion focused on the range of possible locales. The DCC proposed institutional, national, funder and special interest group locales. No others were suggested, and the primary interest was in national and institutional instances. In some cases people had started institutional services and were trying to establish a national version from that, whereas other countries had national pilot projects with a remit to set up services.

Questions were also raised about the architectural setup: should there be a separate hosted instance per locale or a single instance that deals with multiple locales. The latter could either share a common database or operate separate locale-specific databases. A couple of people saw a benefit in a single service in terms of having everything in one place, housed in one server, but the majority were interested in separate national instances and had local infrastructure providers who were likely to operate these.

Motivations for national instances were primarily ownership and control of the data. Some people were concerned about ensuring the data were held locally in their own juridsiction due to differences in national law. Comments were made about potential differences in Terms and Conditions and who has access to the data in each national context. There was also a question about how well the tool would scale if everything was held in one instance.

Which features of DMPonline need to be customized for specific locales?

A number of features were proposed that could be customised for each locale. These included the language presented in the interface and used to write the DMP, the organisational list, available templates, user authentication mechanism and guidance documents. The priority features were adding details of local funders and organisations, developing national-level guidance, multi-lingual options, single-sign-on, template sharing and APIs. There was also a desire for the 'contact us' details to be directed to the local service, not the DCC.

Language translations were felt to be important in several cases (e.g. Denmark) as some funder templates and guidance are only relevant in the national context and are in the native language. In others such as Estonia this was less relevant. Mappings between languages were proposed to cover all options, and an example was given of using the Horizon 2020 template in English (since this is the main research language in Finland) but displaying national-level guidance from the Tuuli project in Finnish.

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[1] http://www.slideshare.net/sjDCC/dmponline-user-group
[2] https://dmponline.dcc.ac.uk/files/DMPonline-v4-LocaleSupport.pdf

There was a desire to make sign in as seamless as possible, for example by using edugain so people can use existing credentials and not have to register. Sometimes using a word document is preferable to researchers as they hate to remember new usernames and passwords. APIs were also a priority for many, for example to connect to research information management systems.

People would like to be able to reuse templates in the system, for example by cloning these to start to create another, and sharing templates across different instances of the tool. There is a constant evolution in funder requirements and what constitutes a valid answer in a DMP – it was noted that the ZonMW requirements have changed over time for example. Since templates change so much, it was felt to be preferable to have a central location for all the templates and for others to adopt them.

The Smithsonian use case in the DMPTool covers a number of challenges which address the concept of locales e.g. the need for foreign languages, researchers being based at different sites, DMPs responding to both internal requirements and federal agencies, and partnerships with transnational teams. The organisation wants to have a centralised repository for all of the DMPs being created in different contexts so there's a clear picture of all the data across the Smithsonian and how these are being managed.

It was suggested that we tag the institutions and funder templates in DMPonline so you can identify where they come from and filter out the relevant content for a given institution or contry. This will allow us to keep everything in one big pool but define a specific view from this.

Which data do we need to share/exchange across locales?

There are a number of types of data captured in DMPonline that could be shared across locales. These include details about the users, the templates, guidance and actual DMPs. The discussions points covered which data should be shared/exchanged between locales. Consideration was again given to the two cases of a separate hosted instance per locale, and a single instance that deals with multiple locales.

There was a desire to share templates, guidance and DMPs, though not necessarily in a single instance. It was felt that PIs could choose which national instance to use and invite researchers from other domains to register and collaborate on plans. Template import/export in XML or JSON was a key feature request to allow content to be transferred, although no standard structure or schema was identified for template definitions. There was also a desire to clone templates to enable reuse. Around half of the participants confirmed that they have developer resources and would be in a position to use a RESTful API to exchange data.

Concerns were raised about burying everything in text, however there was a recognition that the templates are not mature enough to be computer readable yet – H2020 is narrative for example. There was a desire to move towards machine readability and for DMPs to be build into workflows e.g. by alerting funders to the status or a final DMP accompanying data on deposit. Institutions are starting to define templates in a more structured way to help inform local capacity planning and service development.

Who should customize DMPonline instances for specific locales?

In terms of supporting different locales, a number of participants were happy to run their own instance of DMPonline and had technical support in place to do this. Some were using a charged service by DCC and commented on the benefit of the access to expertise this brings, while others were interested in negotiating on options. The approach taken will be very specific to each national context and will be dependent on the outcomes of the various pilot projects.

A key discussion point here was the desire to share language translations. German, French and French-Canadian translations have already been shared and this should be promoted more as people are happy for them to be reused by others.

Proposed activities

It seems likely there will be a hybrid approach to using DMPonline with users from a wide range of contexts adopting the DCC-hosted instance of DMPonline, as well as others running their own instances or contracting the DCC to run services on their behalf. There wasn't sufficient demand for a single, multi-tenant instance supporting all locales with the full range of features proposed in Table 1 of the technical note. Some of these features were in demand though and will be progressed, namely foreign-language support, local user authentication and filtered lists of organisations / funders / templates. We propose to operate a simpler 'personalised skin' arrangement in the main DCC-hosted instance that filters out the content (organisations, funders, templates, etc.) presented to each user based on their account profile and preferences. All plans and other data held in the DCC-hosted instance will still be stored in a common database.

In light of the feedback from the session, the DCC proposes to:

- Pull in the internationalisation work undertaken by the Portage group to provide multi-lingual support
- Provide guidelines for others wishing to translate DMPonline and establish a library of translation files on GitHub to enable others to reuse existing translations that have been shared
- Undertake authorisation work to enable non-UK federations to enable single sign on
- Enable a group of organisations, funders and templates to be defined for a given locale. Basic filters will be applied to separate this content and present it as a reduced set of options
- Allow contact details to be specified for a locale and for the contact us page to be updated in this case
- Extend the 'edit profile' functionality to allow users to set their preferred language and locale
- Provide a template export/import option to enable templates to be shared across instances