

Notes from DMPonline user group meeting

The Wesley, London, Friday 29th January 2015

Attending: Jez Cope (Imperial College), Isabel Chadwick (Open University), Catherine Jones (STFC), Sarah Jones (DCC), David McElroy (UEL), Abdul Minhas (University of Surrey), Cathy Pink (University of Bath), Marta Ribeiro (DCC) and David Wilson (DCC). Patrick McCann & Anna Clements (University of St Andrew's) couldn't attend but sent comments via email.

1. DMPonline roadmap for 2015

Grouping work

There was some initial discussion about the role of the different categories / blocks of work. Were these groupings meant to make it easier to organise work and identify dependencies? Would work be done on each in turn for example, and once one was completed would it be returned to? It was suggested that it may be best to focus on some quick wins initially as the tasks within each block were quite varied.

Jez suggested viewing these groupings as strategic themes that we keep in mind to make sure we're always making progress along each of them. There was a general view that work should be done across all in parallel rather than completing one before starting the next.

Priorities

The top priority for most was to do the tasks that make the tool more usable for researchers. By doing so, the other ideas around review and APIs will be more effective as there will be more usage of the DMPonline and content in the tool to mine. The end-user-orientated tasks flagged were:

- Adding a comments feature
- Allowing multiple suggested answers
- Improving the shibboleth workflow*
- Adding basic branding so users can identify the tool as something from their institution
- Rethinking the presentation of guidance
- Revisiting the 'create plan' wizard

* The Shibboleth workflow was still causing a lot of confusion. As a temporary fix, we should add guidance to explain that people can link their organisation in the 'edit profile' page. It may be worth using ORCID IDs too since not every uni uses Shibboleth. Paddy suggested making the shibboleth login option more prominent.

Otherwise it was felt the priorities were correct. The 'lifecycle and review' and 'API development' work was felt to go hand in hand, and for Abdul was top priority to ensure university endorsement of the tool. SWORD deposit in particular was flagged in this context.

A number of other points were raised in discussion too:

- CASRAI work on standards should be used when looking into systems integration
- The user list presented to admins includes some people who aren't based at that uni
- A better way to organise 'my plans' is needed for administrative users with lots of plans
- The DCC should liaise with research councils more about use of the tool

It was agreed that DCC would release a more detailed roadmap with timeframes for work in the coming months, with a more general schedule for the rest of the year. We aim to do this the week after IDCC and to send out by the end of February.

2. Lifecycle and review

Lifecycle

The overwhelming response was that the lifecycle needs to be kept lightweight and flexible. There were concerns that what we presented was a bit over-engineered. The stages proposed were all nice, but it was questioned whether people would use them. Who will drive the DMP through the various stages? Researchers for example may not go back into the tool to update say funding has been awarded. It's best if this can be fed from other systems e.g. CRIS or Gateway to Research.

Also the phases and lifecycle are very varied in each case. Catherine questioned whether we need to know the flow or if it's better to leave that very open and flexible. Users are only likely to update the DMP 'post-project' if it's required as part of the final reporting so this may not be common.

Cathy finds it's often one continuous version of a plan along the following typical stages:
Draft → Reviewed (by library / support staff) → Revised → Complete → Submitted (to funder, to grant office, to PhD supervisor) → post-award → mid-project → final report

Should institutions be able to customise these terms themselves? One may prefer to call things a 're-draft' while another used 'revised version'. Jez suggested adding a snapshot feature and the ability to add tags like release snapshotting in GitHub to handle versions.

Catherine asked whether versions could be deleted if needed to clean things up? She also suggested separating out the issue of phasing and the internal review lifecycle.

Isabel noted that there may be very different questions at each phase. So for example post-award you may ask much more detailed questions about where the data are located and how file-naming is handled – things that are useful to the project team.

There was also a concern that much of the work may be done outside of DMPonline. People may start a plan, export it and then continue to edit. Making it easy to import again could be useful.

Review

In terms of review, the group questioned whether there would be both an internal and external one and found this terminology confusing. Nobody was familiar with research groups doing their own review first. If comments are provided it's usually an internal review by RDM support staff. External review could be a check by the funders when assessing grant applications.

Usually DMPs are submitted very last minute for comments, so it wouldn't really be desirable to lock them at that stage. David had one example where a lock could be useful (when PhD students are submitting plans to supervisors for approval) but this wasn't the norm.

The existing 'share plan' feature is already used by universities for reviewing DMPs and works well. The group felt that a new role could potentially be added with the ability to comment and edit text as there are often typos. If text changes could be displayed in a different colour, that would be ideal. The ability to tick off answers as completed would be useful too, or perhaps as a traffic light system. Catherine suggested calling the new role a 'commenter' rather than 'reviewer' as it was less loaded and more egalitarian term.

In a similar vein, Paddy suggested that a link could be added to the sharing tab to enable one-click sharing with administrators whom I suggest should be named in the interface. Alternatively (or perhaps as a complementary measure), users could be asked when creating a plan whether it should be shared with administrators, either immediately or when the DMP reaches a certain stage of

development.

Review is typically optional. There could perhaps be a button inviting researchers to send their DMP for review on the export page. If there is an institutional contact who these go to, it would be ideal if the tool automatically alerted them by email. A similar notification would need to be in place to alert people to a review being completed. The researcher typically has final say on saying something is complete / approved rather than the institution.

3. Communication

All agreed that a mailing list for a DMPonline user group would be worthwhile. Paddy suggested that a DMPonline Twitter account might be useful to enable low-friction public (and private) conversations too.

Abdul suggested a note of recent changes being displayed when you login to the admin interface. This could flag new features, and updated templates or planned downtime. A separate mailing list for admin users so we could notify them of changes may be worthwhile.

It would be useful for people to know when the funder requirements have last been checked and updated. This would let them know how accurate templates are.

GitHub could potentially be used more too, but it depends whether we're happy for the development process to be managed openly. The workplan and new features could be tracked here.

There was a willingness to test new features too. Notifications to do so could be emailed to the list.

People were willing to attend more face-to-face meetings when there are specific things to consult on. There was a plea to get more academics around the table in future too.

There was a final question about Jisc's plans for a DMP registry. Will this be a record of DMPs or more of a repository / collection of them? There was a concern that DMPs can't be taken from DMPonline without approval from the user / university.