# DMPonline user groups

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## DMPonline User Group Meeting: DMPs and Research Organization Registry (RoR) identifiers, 10 March 2026

**Zoom link: https://ed-ac-uk.zoom.us/j/89490330747**
**Passcode: dmponline1**

### Agenda

| Time GMT | Agenda item |
|---|---|
| 10:30 | Welcome |
| 10:40 | Introduction to the Research Organization Registry (RoR) feature |
| 11:10 | Key takeaways from IDCC26 workshop |
| 11:30 | Q&A and general discussion |
| 11:55 | Wrap up and close |

#### Roll Call

Name / affiliation / pronouns /  city / social media:

- Jürg B. Logue / Swedish University of Agricultural Sciences / he / Uppsala, Sweden
- Chris Gibson / University of Manchester / he / Manchester, UK
- Kristel Schaap / Leiden Univ Med Centre, NL
- Gary Pike / University of Portsmouth / UK
- Mirjam Brullemans / Radboudumc / Nijmegen / NL
- Morgan Taylor Peterson / VU Amsterdam / Amsterdam / NL
- Mandy Smith / Cranfield University / she/her/ Oxfordshire
- Lindsey Myers / University of York, UK
- Grace Harrison-Tate, Institute of Cancer Research, UK
- Petra van Overveld / Leiden University Medical Center, Leiden / NL
- Jari Friman / Tampere University / Finland
- Esther Byrom / Edge Hill University / UK
- Bev Jones / University of Sheffield / she/her Sheffield UK
- Gizem Sozen / University Medical Centre Utrecht / NL
- Nick Syrotiuk / Durham University / UK

- Björn Ericsson / Stockholm School of Economics / SWE

| **Your questions/comments (please add rows to the table as needed)** | **Answers** |
|---|---|
| Contributing to DMPonline dev roadmap with feature requests. We'd like to suggest new features (e.g. attaching files as evidence to a plan, workflow management and notifications for contributors). | Email dmponline@dcc.ac.uk with any suggestions and we'll be in touch to discuss your suggestions further |
| Would it be possible to add the option to upload attachments? Such as, for example, an overarching DMP from the consortium, a cooperation agreement or a research plan. When a researcher requests feedback, the privacy officer and data steward can use these documents as background information, enabling them to better monitor the DMP. | *Emailed enquirer for clarification. Waiting response.*<br><br>Perhaps include links instead. |
| Another request from our researchers is whether both the Owner and Co-owner can receive a notification when requesting and completing feedback. | Good suggestion. We will look into this. We are currently updating feedback feature to also include department in certain notifications. |
| Is it possible to mass mark DMPs as complete without the researcher receiving a notification? In terms of the DMP being older than 3+ months? | |
| Can we now machine read a DMP to update a Data Register/Catalogue with key fields? | Our API enables you to export all answers to all questions in a DMP in JSON format. Please use API V1. |
| Why is it possible to create an account if you can login with SSO? Same for being able to login in with your institutional account. | Initially, the tool was set up so that users create accounts, and link to institutional log in credentials if they wished to do so, by following these procedures https://www.wiki.ed.ac.uk/spaces/DMPOG/pages/748424428/Link+your+institutional+credentials+Single+Sign+O . Another crucial element was that users could update their user account when they changed institution (and therefore link to their new institution user credentials). |
| Will any additional domains added/deleted to an | Answered during zoom |

| | |
|---|---|
| organisation profile in DMPonline be pushed back to ROR via API? | discussion |

# Training - Mastering the API: Exclusive DMPonline Training for Subscribers, 8 April 2025

## Agenda

| Time UTC+1 (BST) | Agenda Item |
|---|---|
| 10:30 - 11:00 | Introduction to the API, by Glenys Jacob<br><br>Watch video recording |
| 11:00 - 11:30 | Q&A |

# Usage Dashboard, 3 December 2024

## Agenda

- Slides (pdf format)
- Temporarily unavailable - we will let you know once available (YouTube)

Time: 10:30 - 12:00 BST (UTC+1)

| Time GMT (UTC) | Agenda Item |
|---|---|
| 10:30 - 10:40 | Introduction |
| 10:40 - 11:00 | Power Users, New Help pages https://dmponline.dcc.ac.uk/help |
| 11:00 - 11:50 | Usage Dashboard |

| | |
|---|---|
| 11:50 - 12:00 | Wrap up & next steps |

## Roll Call

Name / affiliation / pronouns / city / social media:
Chris Gibson / University of Manchester / he, him / Manchester (UK)
Maria Almbro / Stockholm university / Stockholm, Sweden
Stuart Bentley/ University of Wolverhampton/ Wolverhampton (UK)
Mirjam Brullemans / Radboudumc / Nijmegen, The Netherlands
Esther Byrom / Edge Hill University/ Ormskirk, UK
Lindsey Myers / University of York / UK
Inge Boot/ Rotterdam University of Applied Sciences/ Rotterdam , The Netherlands
Ida Taberman /Swedish University of Agricultural Sciences / Umeå, Sweden
Gary Pike / University of Portsmouth / Portsmouth, UK
Yunhai Yi-Twisk / RIVM / Bilthoven, the Netherlands
Sarah Dar/ University of Wolverhampton
Richard Grimes / Technical University of Delft / he, him/ Delft, NL
Maria Johnsson / Lund University / Lund, Sweden
Adam Harwood / University of Sussex/ Brighton, UK
Rachael Gray / University of Aberdeen / Aberdeen, UK
Andrés Ramos / RIVM / Bilthoven, the Netherlands
Kirstyn Radford / University of Hull, UK

**What's new**

- Help pages for administrators and users! https://dmponline.dcc.ac.uk/help *walk through*
- HMC workshop on semantics interoperability, https://zenodo.org/records/14051317
- IDCC February 2025 - https://www.eventbrite.co.uk/e/w6-future-proofing-data-management-tickets-1027908882137
- 20 May 2025, DMPonline Community Event ***– please reach out if you want to participate***

**Usage Dashboard**
We want to enhance the user experience for administrators and get more out of the tool: https://edin.ac/3BkKwlP

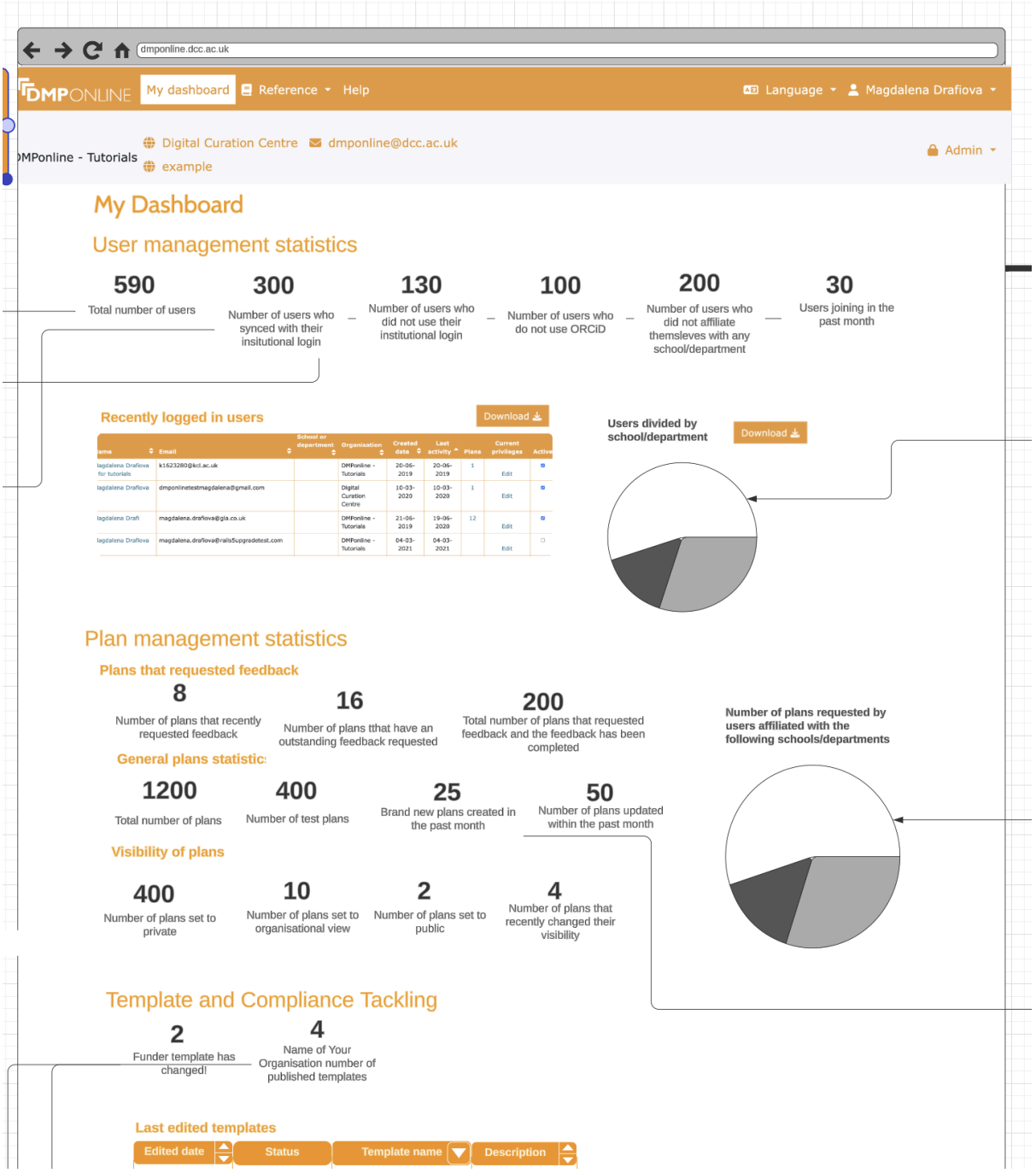
You can currently grab statistics from 'Usage' page, some from users, some from plans page
How do you normally go about this?
Is there somethis specific you are interested in?

**Suggestions/questions/observations**

- Ida (ida.taberman@slu.se), It would be interesting to be able to download statistics from the edit dashboard menu (tick-box page) as well and not only from the first front

screen/page My dashboard (screen shot below). Hope that makes sense. **Answer:** Thank you Ida, I have added this to the ticket dealing with this

*Screengrab from Lucid - suggestion*




**DISCUSSION HILIGHTS:**

The recent DMPonline user group meeting prominently featured discussions around the anticipated Usage Dashboard. This tool is aimed at improving administrative efficiency by providing insightful and actionable data management statistics.

1. **Dashboard Features Overview:**

    - The Usage Dashboard is designed to provide detailed metrics on DMP activities such as the number of plans created, feedback requested, and visibility settings, along with user engagement and compliance information.
    - The presentation of these statistics will be highly informative, aiding administrators in monitoring and enhancing data management processes and administrators will be able to download these.

2. **Content vs. Visuals:**
    - We would like to emphasise that the discussion was on the content and specificity of the statistics rather than the graphical or visual aspects of the dashboard.

3. **Customisation and Standardisation:**
    - While administrators will have the ability to customise which statistics are displayed using toggles, the order in which these stats appear will remain fixed. This standardisation will help maintain consistency across uses, ensuring all users interpret the dashboard similarly.
    - This non-customisable order will consist of main categories such as Plan Management, User Metrics, Template Changes, and Compliance Tracking.

4. **Accessibility and Navigation:**
    - Administrators will access the Usage Dashboard through a specific navigation path within the platform: by accessing the Admin tab, selecting 'Organisational Details,' and then navigating to the newly added 'User's Dashboard' tab.
    - This method ensures that control over dashboard configurations is centralised and streamlined.

5. **Technical Implementation:**
    - The discussion also addressed technical implementation, with mock-ups provided to illustrate how the dashboard might look and operate. While design is not the focus, the user interface will be developed to ensure ease of use and accessibility.

## Key Action Items

- Community Feedback: Continued feedback is sought from the community, specifically focusing on desirable content and functionalities that enhance administrative capabilities.
- Engagement in Development: Members interested in contributing more directly to the dashboard's development are encouraged to get in touch with as dmponline@dcc.ac.uk.

## Conclusion

The Usage Dashboard is designed to become a crucial tool for DMP administrators, blending comprehensive data insights with a user-friendly design. Your input as part of the

user community has been invaluable in directing the focus towards impactful content and practical functionality, ensuring the dashboard will meet the community's needs effectively.

**Summary**

- Dates for your calendar
    - 4 December 2024, DMPonline training https://edin.ac/3B09s1P
    - 17 February 2025, *Future-Proofing Data Management: Interactive Workshop on DMPonline's Progress and Path Forward*, workshop as part of IDCC 2025
    - 8 April 2025 PM, DMPonline advanced training - using API
    - 20 May 2025, DMPonline Community Event

# Templates Update, 10 September 2024

## Agenda

- Slides (pdf format)
- Video recording (YouTube)

Time: 10:30 - 12:00 BST (UTC+1)

| **Time GMT (UTC)** | **Agenda Item** |
|---|---|
| 10:30 - 10:40 | Introduction |
| 10:40 - 11:00 | Latest updates<br>- DOI for Research Outputs launched in June<br>- Plan IDs<br>- Move to Sectigo SSL certificates |
| 11:00 - 11:15 | Updates to DCC DMP template (approx minute 23:30 in video) |
| 11:15 - 11:30 | Updates to funder templates (approx minute 54:30 in video) |
| 11:30 - 11:50 | Questions, discussion |
| 11:50 - 12:00 | Summary |

### Roll Call

Name / affiliation / pronouns / city / social media:

- Diana Sisu / Digital Curation Centre / Edinburgh / @dianasisu, @DMPonline
- Nina Lewin Oxford Brookes
- Joakim Philipson / Stockholm University
- Maria Almbro / Stockholm University
- Richard Grimes / TU Delft

- Deepshikha Purwar / TU Delft
- Soile Manninen, University of Helsinki/ Tuuli Office, Finland
- Maria Johnsson, Lund University
- Angeliki Andrikopoulou, University of Birmingham
- Jari Friman
- Camille Regnault
- Philippa Sterlini
- Ruth Geraghty / Royal College of Surgeons in Ireland / she-her / Dublin / @ruthogeraghty
- Lisa Olsson
- Michelle Willows
- Esther Byrom
- Melanie Regan
- Christopher Tibbs
- Gary Jeffers
- Kerry Miller
- Lara Skelly
- Nicola Cockarill
- Desiree Campbell
- Yan Wang
- Daniel Bailyes
- Zosia Beckles
- Evelyn Williams
- Amanda Boll
- Amie Longthorne
- Theresa Kieselbach
- Mirjam Brullemans
- Angeliki Andrikopoulou
- Mareike Buss
- Jamie McQueen
- Jacqueline Vigilanti
- Christopher Warren
- Meriel Patrick
- Jane Grogan
- Brenda Philips
- Dimitri Unger
- Andres Ramos
- Helga Neves
- Jürg Logue

**NOTES**

## Update on latest development work

1. Main priorities: integration, automation

2. Released integration in July 2024 - DOI for Research Outputs, integration with OpenAIRE Graph API, read news item on DCC website
3. Working on API V2, to replace and combine functionalities of current API V0 and V1
4. Sectigo SSL certificates
    - Switched from Let's Encrypt to Sectigo SSL certificates
    - Thank you for your prompt action!
    - FAO enhanced customers:
        - Sectigo certificates are currently renewed once a year, but there are discussions about renewal every three months, which will be inconvenient for you. You will have to ask your IT department every three months to ask them to update the CNAME entry.
        - Up until now, we have offered our customers fully customised URLs, with URLs based on their organisation's domain, e.g. https://dmponline.eur.nl/ for Erasmus University.
        - From now on, we will offer wildcard style URLs based on dmponline.dcc.ac.uk . Your URL will be myuniversity.dmponline.dcc.ac.uk .
        - Customers who already have a fully customised URL, based on their University's domain, may consider switching to wildcard URLs and putting a forwarding rule in place from their current URL. Some of you have already commented that this will not be well received and we appreciate that your fully customised URL, based on the institution domain may now be too well established to be changed. ACTION: DMPonline to follow up with enhanced customers re URL. **Done**.
        - ACTION: DMPonline team must send better instructions on renewal of certificates, perhaps a step by step guide on what needs to happen. IT departments seem to use different terminology and found our instructions confusing. We should also give an indication of who normally deals with this, e.g. network security. IT departments are typically quite large and it's not always clear whose remit it is to put SSL certificates in place.
5. DMP IDs
    - Plan IDs are displayed on Project Details page (tab)
    - The plan ID assigned by DMPonline, will become uneditable (it currently is editable). The field will be called 'DMPonline ID'
    - Will add an additional plan ID field, which users can edit. The entry can be, for example, an institutional plan or grant ID and, in the long run, it could become an integration. Field will probably be called 'Project ID'.
    - Both ID fields will come with tool tips (explanations on mouse-over).
    - Comments and questions:
        - Will the additional plan ID be numbers only? No, it will be editable by user and can follow organisation naming conventions for research projects, if they exist.
        - Manual project IDs can be a bit dangerous because they can change between different copies of a DMP. Not every university has its own CRIS system where all projects are registered. Answer: True but some universities are already using the manual ID; ideally DMPs should be continuously updated not copied; the manual ID could become an

integration. ACTION: Diana to follow up with Theresa Kieselbach who raised this concern. COMPLETED case no 00078709.

## Updates to DCC template (skip to minute 23:30 in video recording)

For this session, we were joined by Joy Davidson, Deputy Director of DCC.

Topics covered (see slides 10-20)

- Changes to fields in 'Project Details''
- Changes to fields in 'Contributors'
- Changes to content in DCC generic data management plan (DMP) template. This included changes to questions and guidance, and adding new standard questionnaires, more precisely, Ethics Assessments and Data Protection Impact Assessments.

### Changes proposed to Project Details page in DMP

Please note that these changes will apply to all DMPs, irrespective of template.

| Field | Proposed change | Your comments |
|---|---|---|
| Research domains | Currently based on the Frascati Manual, see https://www.oecd.org/innovation/frascati-manual-2015-9789264239012-en.htm. Needs tidying up, has a duplicate entry. | If you can think of better sources than the Frascati Manual, please insert here. |
| Dates | Use ISO format, e.g. 2024-07-29. Include guidance to say that, if exact dates are not known, include the anticipated start/end date and suggest they update this field once the actual dates are confirmed. | |
| ID | There will be a DMPonline ID (non editable) & an additional Project ID, editable. | See comments above (in 'Updates on latest development work' section).<br><br>Could be a DOI for published DMP too at end stage.<br>I echo it would be helpful to add the CRIS number. [note, CRIS = Central Registration and Identification Scheme] |

| | | |
|---|---|---|
| | | Not a native English speaker (like most users?), but could perhaps "Additional Plan ID" be misinterpreted as a reference "ID of *another* DMP, even outside DMP Online?<br><br>Manual project IDs can be a bit dangerous because they can change between different copies of a DMP. Not every university has its own CRIS system where all projects are registered. A human person who knows the project concerned may still be able to understand a manually added project ID, but manual project IDs may not work well for maDMPs. |
| Ethical concerns | Improve tooltip explanation for ‘Research outputs may have ethical concerns’ to explain what this means. | Everything has ethical concerns We have a similar point on our forms and it fails.<br><br>The specific phrasing of 'Ethical concerns' sounds to me like a euphemism for 'This research should probably not take place' rather than the more normal situation of there being ethical issues which need to be considered |
| Funding status | Align with the award lifecycle. Choices could be: ‘application stage’, ‘in award’ and ‘post award’. | Align with CRediT<br><br>Funding status needs to continue to have an option to reflect the fact that not all projects have external funding. Also, some long-running projects may have multiple chunks of funding from different sources - an 'Other' option is always useful!<br><br>It would be nice to see a |

| | | |
|---|---|---|
| | | N/A option (funding doesn't always apply for some projects in our workflow). [comment backed up by several people] |
| Funding call | Provide new field to enter funding call as a URL. | Funding call URL would be great |
| Grant number/URL | Add tooltip to invite user to complete this once grant number is known. This will become automated through integrations (machine actionable grant ID fields). | |

Additional comment from Nina:

- I suggest we add preprosal post proposal, for pg. ACTION: Diana to follow up, unclear what Nina meant. COMPLETED Emailed Nina on 14 Sep, case ref 00078654.

**Changes proposed to Contributors page in DMP**

Please note that these changes will apply to all DMPs, irrespective of template.

| **Field** | **Proposed change** | **Your comments** |
|---|---|---|
| Roles | Add 'Co-Investigator' as an option. Possibly add 'Data Steward' and 'Research Software Engineer' to the list to reflect developments in the field. Where people tick 'other', provide box to enter response. | Also add supervisor and fieldworker to the role.<br><br>Would be good if roles aligned with CRediT [comment backed up by several people]<br><br>Contributor roles standard: https://www.niso.org/publications/z39104-2022-credit<br><br>Supervisor could be very useful [backed up by several] |
| ORCiD number field | Make field machine-actionable, to enable users to enter collaborator by ORCiD number. | |

**Changes proposed to content of the DCC Generic Template**

Download proposed DCC DMP, including guidance. New/reworded questions are highlighted.

Currently template has 13 questions. With proposed change, no of questions will go up to 20.

| Currently published template | Proposed template | Your comments |
|---|---|---|
| **Data collection**<br>• What data will you collect or create?<br>• How will the data be collected or created? | **Data collection**<br>• Are you likely to generate or use a large amount of data? [question re-worded]<br>• How will the data be collected or created?<br>• Will you generate any research software as part of your research? | |
| **Documentation and Metadata**<br>• What documentation and metadata will accompany the data? | **Documentation and Metadata**<br>• What kind of contextual material will you generate to help data retain meaning and be understandable?<br>• What documentation and metadata will accompany the research software (if applicable)? | What would the feeling be about a question asking whether researchers will be using any data or metadata standards, ideally with a link to info about this? ACTION: Diana to follow up with Meriel. COMPLETED case 00078715 |

| | | |
|---|---|---|
| **Ethics and Legal Compliance**<br><br>• How will you manage any ethical issues?<br><br>• How will you manage copyright and Intellectual Property Rights (IPR) issues? | **Ethics and Legal Compliance**<br><br>• How will you manage any ethical issues?<br><br>• How will you manage copyright and Intellectual Property Rights (IPR) issues?<br><br>• How will you ensure your outputs are cited correctly? | |
| **Storage and Backup**<br><br>• How will the data be stored and backed up during the research?<br><br>• How will you manage access and security? | **Storage and Backup**<br><br>• How will the data be stored and backed up during the research?<br><br>• How will you manage access and security?<br><br>• Will a data repository be used during and/or after the active stage of research? | Our past experience suggests researchers don't always mean the same by 'repository' as we do. This term might refer to a local departmental data store, rather than anything intended for long term preservation - so putting it in the storage section runs the risk of confusing people. [comment endorsed by several]<br><br>I understand that the DCC template is designed from a UK perspective. As for Sweden, it is important to draw clear lines between storage and backup, giving access to research outputs in a repository, and archiving because these are different things. [comment endorsed by several] |

| | | |
|---|---|---|
| **Selection and Preservation**<br><br>• Which data are of long-term value and should be retained, shared, and/or preserved?<br><br>• What is the long-term preservation plan for the dataset? | **Selection and Preservation**<br><br>• Which data are of long-term value and should be retained, shared, and/or preserved?<br><br>• What is the long-term preservation plan for the dataset? | No changes proposed but feel free to suggest changes. |
| **Data Sharing**<br><br>• How will you share the data?<br><br>• Are any restrictions on data sharing required? | **Data Sharing**<br><br>• How will you share the data?<br><br>• Are any restrictions on data sharing required?<br><br>• Data Availability Statement | Data sharing vs data publishing vs data archiving are also terms that not all researchers think of in the same way as we do. [comment endorsed by several] |
| **Responsibilities and Resources**<br><br>• Who will be responsible for data management?<br><br>• What resources will you require to deliver your plan? | **Responsibilities and Resources**<br><br>• Who will be responsible for data management?<br><br>• What resources will you require to deliver your plan?<br><br>• Who will be responsible for updating the DMP?<br><br>• Data cleaning costs | I find researchers often don't know how long they will need to clean data, they find this hard to guage<br><br>Agreed that cost is critical but we would need to link it the allowable cost in the funder template rather than have it an open field<br><br>Would data curation costs be a more appropriate term than data cleaning costs? Data cleaning has quite specific connotations whereas data curation covers a wider range of activities, all of which should be costed in (in one way or another) |

| | | |
|---|---|---|

**Adding new standard questionnaires to DMPs**

- We put forward the proposal of adding Ethics Assessments and Data Protection Impact Assessments
- These would be added as new tabs in a DMP (or new phases to a template, if you like)
- Proposal was generally well received, some users expressed the view that DMPs are incomplete without them
- Some users enquired about the option of leaving them out (not all DMPs require DPIAs). Answer: yes. These standard questionnaires would be implemented as phases in a template and currently, phases can be easily deleted. Alternatively, we can use tick boxes to switch questionnaires on or off. Organisations may change their mind - they may not want to add questionnaires as part of DMPs at this stage, but may wish to do so later on.
- The questionnaires can be customised by the institution to suit their needs. This is important!

Issues raised:

- Questionnaires can be quite long. A university that shall remain unnamed has a mighty 24-page long DPIA questionnaire. We may need to come up with a standard, more succinct and broadly accepted questionnaire first (if such a thing exists), which institutions can then customise.
- There is a great overlap between questions in DMPs and Ethics assessments and DPIAs. Use a mapping facility to retrieve answers to similar questions from DMP into Ethics/DPIAs.
- This should at least be implenented in a modular way. Especially with the EU AI Act coming into force, we may want a way to add on a separate questionnaire for that. ACTION: Diana to get in touch with Richard Grimes to check what he meant by modular. COMPLETED Case no 00078713
- Menu on the DMP will get quite busy, with an increased number of tabs (Project Details, Contributors, Plan Overview, Write Plan, Research Outputs, Share, Download). May have to implement menu expansion and contraction, e.g. display key items of a DMP, and hide additional facilities behind the well established ellipsis menu (‘three dots’ symbol), which lets users know there is more to come.

## Updates to funder templates (skip to minute 54:30 in video recording)

Topics covered (see slides 21-25)

- Currently revising all templates
- Adding new funders and their templates to the system. ACTION: All. If you have funders in your country that require DMPs and have DMP templates already, please sent them to us.
- Implementing UKRI funder templates as two-phase templates in DMPonline, with an Initial DMP to be entered in The Funding System (TFS at https://funding-service.ukri.org/) at grant application stage. Ongoing discussions with our each of the funders.

Questions put to the audience were:

- Does the Initial DMP phase in DMPonline look similar enough to what is available in The Funding System (TFS)
- Should we also include the Ethics section of TFS grant applications in the Initial DMP

Comments:

- It was suggested we should add the Ethics section under the DMP as it encourages researchers to think early about ethical issue. Also, funders like AHRC seem to 'seem to have squashed data management into the section on ethics and responsible research'? There were also comments that in TFS the section on Ethics and Responsible Research and Innovation (RRI) on ESRC grant-application form is basically the same question as the section on Data Management on Sharing. Note: will raise this with research councils.
- There were questions on why would you fill in the grant-application stage (= proposed Initial DMP) in DMPonline rather than in TFS. Answer by one user is because it gives researchers some structure, and it keeps everything related to a project in one place. DMPonline team would add: Initial DMP can also be sent for feedback before submission.

## Questions/Discussion

**Question 1**: Will there be new features added to the API v2 or is the focus on reaching parity with the current v0 and v1 APIs?

> Answer: API V2 will provide all existing functionality of API V0 and V1 and will comply with common standards. In addition, it will enable user-level authentication.

**Question 2**: We have an institutional template which we are considering updating the template questions and guidance. Please can you offer advice on whether it is better to edit the existing template and guidance or create a new version 2 template with guidance? With either option, is there any impact on plans created on what will be the previous template?

> Answer: If we just update questions, I suggest you use the same template. It will be similar enough and the template versioning feature will keep track of when the questions were updated. Any old plans created on this template won't be affected; all plans are based on the version of the template they were created on, new questions won't just appear.
>
> When we add the new phases (i.e. new standard questionnaires on ethics and DPIA) then perhaps the template is different enough to create a whole new template. You can use the copy template function for this.

**Question 3**: Before adding new questions, have you reasoned about what kind of answers you may get and what essential new information they will bring? (Supposedly, still free text answers, right?)

Answer: About free text: yes, but this is a consultation, we are open to suggestions on how we can narrow the focus of these questions, use more conditional questions, standardise answers. With regards to the second question (have you reasoned about what kind of answers you may get), I'll ask DCC management about this and get back to you. ACTION: Diana to get in touch with Joakim to find out more about what he had in mind and how we could cut down on free text. COMPLETED case no 00078718 (case assigned to his colleague, Maria).

**Question 4**: Is it possible to associate a funder with multiple templates? It would be nice if when a user creates a new plan and selects, for example, NWO they can choose between the NWO template and our institutional template (which is also accepted by NWO).

Answer: Not at the moment, but we can look into this. NWO is a particular case because it asked universities to create institutional templates as customised version of the NWO template.

**Question 5**: Angeliki Andrikopoulou: With regard to updates on funder templates, would it be possible for the EUniWell DMP template to be added to the list of templates? Template and guidance:
https://www.euniwell.eu/fileadmin/user_upload/Downloads/_Research/H-D2.1_Open_Data_Management_Plan_3.0_15112023.pdf

Answer: Yes. Thank you so much for sending the source documentation. Added to our Jira issue on the development board. ACTION: Diana to get in touch with Angeliki. COMPLETED case no 00078719

**Question 6**: Not about funder templates, but I wasn't able to join the workshops on March 19th, unfortunately, but I was wondering when the previously discussed update on the create plan wizard will be effective. The missed tickbox for 'no funder associated etc.' is still our main issue for our users; we are waiting for just the list of available template with the institutional template being the first option to be implemented.

Answer: your proposal is noted. We will consider it when drafting the feature specification. ACTION: Diana to add Mirjam Brullemans' proposal to Jira issue for new plan creation wizard.

## Summary

- Will share proposed DCC template with you and give you two-three weeks to comment, after which we will publish the revised template.
- Dates for your calendar
    - Our next event is on 22 October 2024 - topic: Development priorities 2024-2025
    - 3 December 2024 - Organisation data on DMPonline, including ROR data
    - 17 February 2025, *Future-Proofing Data Management: Interactive Workshop on DMPonline's Progress and Path Forward*, workshop as part of IDCC 2025
    - 8 April 2025, Topic TBC, including feedback from the IDCC workshop

- 20 May 2025, DMPonline Community Event

# User experience (UK) workshop, 19 March 2024

## Agenda

Start time: 10:30 - 12:00 GMT (UTC)

| Time GMT (UTC) | Agenda Item |
|---|---|
| 10:30 - 10:40 | Introduction |
| 10:40 - 11:00 | Updates on development work and workshop at IDCC 2024 |
| 11:00 - 11:10 | Questions |
| 11:10 - 11:20 | Coffee break |
| 11:20 - 11:50 | UX workshop - parallel group discussion, jamboard |
| 11:50 - 12:00 | Summary |

Presentation slide deck
Video

### Roll Call

Name / affiliation / pronouns / city / social media:

- Diana Sisu / Digital Curation Centre / Edinburgh / @dianasisu, @DMPonline
- Magdalena Drafiova/Digital Curation/Centre/Glasgow
- Ida Taberman / Swedish University of agriculture Science / sweden Umeå/
- Petra van Overveld / LUMC Leiden, the Netherlands
- Rachael Gray / University of Aberdeen / UK
- Chris Tibbs / University of Exeter / UK

**NOTES**

**Update on latest development work**

- Survey: Are you happy to continue zoom? - https://form.jotform.com/240583147269058

**Questions**

*Andrew Ramos (RIVM) About the APIv2, that means that an institute will have the rights to remove user accounts only realted with Rspace or also DMPonline?*
Administrators cannot remove users, DMPonline team can de-active user, or deactivate user if we have been specifically asked

In order to connect DMPonline with RSpace you need to give permission to RSpace to access DMPonline. It is just a connection.

*Chris Gibson For the updated UKRI templates, will the funders' 500 word limited requirement be a new section that prefixes the relevant UKRI template? Please can you outline how will it look to the end users?*
It will be similar to Horizon 2020 where there are several phsaes to a template. Phase 1 - initial DMP, Phase 2 would be the current funder template as it is (detailed funder template with allt he questions).

*Nina Lewin with access to the similar DMP, we are likely to start seeing AI generated DMPs. What about the copyright and authorship of the DMP?*
We have public plans if user allows their DMP to be publicly visible.

*We are considering recommending that DMPs are deposited to our internal repository where eg DPIAs are stored - would it be possible to have an API-based 'publish to repository' button alongside the share/download options?*
**DMPonline team to get back to the question after the meeting**

*Reminders to update DMPs: for some funders we have to do this halfway the project and at the end. It would be great if we can set deadlines or reminders on a DMP that will automatically be sent to the (co)owners.*
**DMPonline team to get back to the question after the meeting**

*Carolin Revernig-Hedman It would be great if the Contributors section could be included in the download of a dmp.*

**UX workshop - parallel group discussion**

**Summary**

- We will share a blog post after we process the discussion notes internally and get back to you
- Our next event will be Community event 20 March 2024

# Delivering a DMP, 23 January 2024

## Agenda

Start time: 10:30 - 12:00 GMT (UTC)

| **Time GMT (UTC)** | **Agenda Item** |
|---|---|
| 10:30 - 10:40 | Introduction |
| 10:40 - 11:00 | Update on latest development work |

| | |
|---|---|
| 11:00 - 11:10 | Questions |
| 11:10 - 11:20 | Coffee break |
| 11:20 - 11:45 | Planning for FAIR data, Joy Davidson |
| 11:45 - 11:55 | Discussion on possible trigger points for support provision - jamboard |
| 11:55 - 12:00 | Summary |

## Roll Call

Name / affiliation / pronouns / city / social media:

- Diana Sisu / Digital Curation Centre / Edinburgh / @dianasisu, @DMPonline
- Chris Gibson / University of Manchester / Manchester, UK
- Greg Simpson / Cranfield University / UK
- Lara Skelly / Loughborough University / Loughborough / @lboroRDM
- Chris Tibbs / University of Exeter / UK
- Lindsey Myers / University of York / UK
- Maja Pelve / Swedish University of Agricultural Sciences / Uppsala
- Lisa Olsson / Sunet and Stockholm University / Stockholm
- Gary Pike / University of Portsmouth / UK
- Petra van Overveld / LUMC Leiden, the Netherlands
- Mirjam Brullemans / Radboudumc Nijmegen, the Netherlands
- Andres Ramos / RIVM / Bilthoven, the Netherlands
- Jeroen Rombouts / Erasmus University Rotterdam, the Netherlands
- Maria Johnsson / Lund University/ Lund
- Nina Lewin/Oxford Brookes University
- Clair Castle/University of Cambridge
- Soile Manninen / University of Helsinki, Tuuli Office (DMPTuuli)
- Carolin Rebernig-Hedman/ Umeå University/ Umeå/ Sweden
- Joakim Philipson / Stockholm University
- Rachael Gray / University of Aberdeen / UK
- Adam Harwood / University of Sussex / UK
- Deepshikha Purwar/TU Delft/The Netherlands

**NOTES**

**Update on latest development work**

1. Machine actionable grand ID - for DMPTuuli - second iteration will be deployed in Jan
2. DOIs for Research Outputs - for all services - currently considering best API
3. Question IDs - for all services - specification approved, development started
4. ROR - writing specification
5. RSpace - development almost complete, DMPonline API V1 needs adjustment to complete task
6. New EDS (embedded discovery service) - for DMPonline, will be deployed in Feb

    a. UKFederation is removing their discovery service on 29th Feb. Services were asked to create a discovery service for their usage
7. Minor update to API V1 - dmp_id.identifier changed from ‘http’ to ‘https’ format

**Questions**

- Chris Gibson: Questions Identifiers - Can an org admin add their own Questions Identifiers to a customised template? Answer: Yes, an org admin can add Question Identifiers to a template when customising a funder template. It just needs to be unique to that template.

- Chris Gibson: ROR workflow and if the user would have a responsibility - The answer was that to the end user nothing will change. They will just see a bigger list of organisations when creating an account or when adding a collaborator to the DMP. And this system will add a new organisation to the tool organisation list when the user selects an org that is not present. But this will be all done behind the screen.

- Lisa Olsson: Under Project Details, the new tick-box "Research outputs may have ethical concerns": Can we (admins) export that information somehow to identify sensitive projects? Could that info be a column in the export of plans? (If that is a valuable idea). Can also be retrieved through API.

- Joakim Philipson: will the discovery service affect our URLs? Answer: No.

- Petra van Overveld: discovery service, do we need to change something, because we have an automatic login via SURFconext? Answer: No.

- Andres Ramos Padilla: For the DOI in the Research outputs, will this automatically read the metadata information and put it in the DMP? Answer: yes, retrieving the DOI will also enable automatic filling in of metadata (e.g. name of dataset, repository) at both the create and edit/update stage.

- Jeroen Rombouts: Are there international standards available or being developed for the question ID’s?

**FAIR DMPs (Joy Davidson)**
**Questions/Discussions**

Joy’s asked participants to focus answers to the following questions:

- Are there specific research lifecycle trigger points that we can identify where periodic check ins could take place?
- Could any of these trigger points be linked to functionality in DMPonline?
- Are there ways to incentivise researchers to update their DMPs via the Research Outputs functionality?

Participants were invited to enter their answers on a Jamboard. Entries from the Jamboard are included below.

**Funded research lifecycle trigger points for incremental support:**

- Proposal stage
- Data collection stage
- When/if offered data storage
- Project wrap-up and final reporting
- End of work packages! And also at the tranche of funding. Also an initial ethics
- When submitting publications
- End of work packages

**DMPonline trigger points:**

- Initial DMP
- When preparing for publication
- When adding new research outputs
- If a research student - when submitting 1st year report or preparing to move from MPhil to PhD
- After data collection/creation

**Incentives for researchers to update DMPs:**

- End of grant reporting
- Make including DMP in first year report for research students compulsory
- Mandatory moments during grant period from funders; for example list of key files where we have to provide links to the output for Dutch funder ZonMw
- Potential for re-use of elements of plans
- Publication of DMPs
- To have an inventory of selected project outputs
- As mandatory part of PhD tract
- Managing collaborations
- Mid-term reviews (PhD, Funded, ...)
- DMP should be updated to get data to the right/trusworthy data repository - DMP reveals if the data is suitable for the repo (are legal issues considered, are datatypes suitable etc
- If offered data storage throughout the data life cycle
- If there was funding for data write and curation , then that could be attached to an updated DMP.
- Factor in reminders into DMPOnline to review it - could ask researchers to identify reminder points themselves
- Integrated review of DMP, Ethics and privacy (deduplication) and automating requests for services from answers provided

**Comments:**

Chris Gibson: we should create API to enable organisations to write metadata in DMPonline on behalf of their researchers. By this he meant finding identifiers that map across different systems and using them in DMPonline. For example, we could use a RAID identifier as a Project ID. Several participants agreed with Chris's idea. ACTION: Diana to approach Chris to ask for further information.

Nina Lewin: we have to specifically build into the DMP the concept of change and that change is nor a problem.

Nina Lewin: *How are safe havens different from TRE are they archives?*
Answer from Joy: I believe they're the the same, different terms for the same thing. So a trusted research environment (TRE) and a safe haven are technically, used in the same context. Whether they store archive longer term is down to the individual environment.
Another answer: My understanding is that a safe haven is another term for TRE. Our current theory is known as the data safe haven but but TRE is the genetic terminology for it. We do sometimes archive them long term if they can't be openly shared, though it's primarily data storage during the project for sensitive data.

Note FAO DMPonline team:
Joakim commented: Sometimes maybe Generalist repositories (e.g. from the GREI collaboration) may "strike higher" on the Interoperability (of metadata) of FAIR, than "narrow" institutional or domain specific repositories? Note: I think Joakim's comment was in response to the comment that Research Outputs feature retrieves list of repositories from re3data and the search facility returns generalist repositories first.

# Proposed new feature: question identifiers, 14 Nov 2023

## Agenda

Start time: 10:30 - 12:00 GMT (UTC)

| **Time GMT (UTC)** | **Agenda Item** |
|---|---|
| 10:30 - 10:40 | Introduction |
| 10:40 - 11:05 | Quick updates on development of machine-actionable features |
| 11:05 - 11:15 | Questions |
| 11:15 - 11:25 | Coffee break |
| 11:25 - 11:50 | Proposal for a new feature from DMPTuuli - question identifiers (IDs) |
| 11:50 - 12:00 | Summary |

## Roll Call

Name / affiliation / pronouns /  city / social media:

- Diana Sisu / Digital Curation Centre / Edinburgh / @dianasisu, @DMPonline
- Magdalena Drafiova|Digital Curation Centre| Glasgow
- Glenys Jacob / Digital Curation Centre
- Don Stuckey / Digital Curation Centre
- Mark Bruyneel, Vrije Universiteit Amsterdam m.bruyneel@vu.nl
- Lisa Olsson / Sunet and Stockholm University / Stockholm, Sweden
- Carolin Rebernig-Hedman/ Umeå University/ Umeå, Sweden
- Lindsey Myers / University of York / UK
- Joakim Philipson, Stockholm University
- David Wilson / Digital Curation Centre
- Rachael Gray / University of Aberdeen / Aberdeen / UK
- Ylva Berglund Prytz / SLU (Swedish University of Agricultural Sciences) / Uppsala, Sweden
- Maria Almbro / Stockholm University / Stockholm / Sweden
- Petra van Overveld / Leiden University Medical Center / Leiden, the Netherlands
- Adam Harwood / University of Sussex/ UK
- Soile Manninen / University of Helsinki, Tuuli Office, DMPTuuli
- Chris Gibson / University of Manchester / UK
- Ida Taberman / Swedish University of Agricultural Sciences/ Sweden / Umeå
- Deepshikha Purwar / Technical University of Delft / the Netherlands
- Nina Lewin/ Oxford Brookes University/ Oxford

## Questions

Mark: Can you give an example of what does not work the way you want? Research Output?

- UI needs improvement. The repository search feature can be improved. Repo search should feed the metadata standard.
- Suggestion from Nina: also if you are in a university then the institutional repository should be prepopulated
- Chris: DataCite metadata schema might help with definitions of output types for some cases. Also other schema may provide useful definitions.
- Mark: would be good to have definitions for the types of datasets
- Soile: we cannot add institution's repo to Re3Data because they have a different registration policy which stops us from adding to it (re3data's registration policy says that repo should have focus on research data; many organisations institutional repositories includes publications and data)
- Nina: to make things more complex crossref has dataset DOI. and many IRs would have Soile IR problem

## Proposal for a new feature from DMPTuuli - question identifiers (IDs)

Chris: We prefix all our DMP templates with our locally created ‘Outline’ section that asks mostly multiple choice questions. We’d like to automate harvesting of those responses - perhaps with an API. Is it possible to enable an API that we can use to interrogate our own, locally created institutional section? (Is this the same as, or similar to Tuuli?)

- Yes, it is possible but an additional system (similar to what DMPTuuli has) will be required to extract and analyse data from the API
- Joakim: Thanks Jari and Matti, very interesting. We at Stockholm University have our own local maDMP-template, with multiple choice questions, radio buttons etc. (that validates against the RDA DMP Common Standard madmp-schema-1.1.json) , and then use - as you - API v.0 to harvest and transform the DMPs to RDA DMP common standard , using also a local tailormade schematron schema and an xslt-file… Described in Project here: https://doi.org/10.7910/dvn/mgzbal

**AOB**

- This is the last user group for this year
- The next one will be on 23rd January 2024, with a presentation by UCD (University College Dublin) on interactive DMPS (checkpoints in DMPs)

# Machine-actionable Grant ID, 10 Oct 2023

## Agenda

Start time: 10:30 - 12:00 BST (= UTC+1).
Slides
Video on YouTube channel

| Time UTC+1 | Agenda Item |
|---|---|
| 10:30 - 10:40 | Introduction |
| 10:40 - 11:05 | Specification - machine-actionable grant ID - DMPonline |
| 11:05 - 11:15 | Discussion |
| 11:15 - 11:25 | Coffee break |
| 11:25 - 11:50 | Machine-actionable grant ID - OPIDoR |
| 11:50 - 12:00 | Summary |

### Roll Call

Name / affiliation / pronouns / city / social media:

- Diana Sisu / Digital Curation Centre / Edinburgh / @dianasisu, @DMPonline
- Magdalena Drafiova/ Digital Curation Centre/ Glasgow
- Glenys Jacob / Digital Curation Centre / Edinburgh
- David Wilson / Digital Curation Centre / Edinburgh
- Chris Gibson / University of Manchester
- Petra van Overveld/ LUMC Leiden, the Netherlands
- Ida Taberman / Swedish university of Agricultural Science / Umeå
- Gary Pike / University of Portsmouth
- Joachim Ekebom / Stockholm School of Economics
- Lisa Olsson / Sunet (Tjänsteförvaltare Datahanteringsplan) and Stockholm Uni
- Adam Harwood / University of Sussex / Brighton
- Joakim Philipson / Stockholm University
- Bev Jones / University of Sheffield
- Soile Manninen / University of Helsinki, DMPTuuli/ Finland
- Philippa Sterlini / University of Dundee

## 1. Introduction

Workshop on Interoperability for data management plan (DMP) tools at IDCC 2024, organised in collaboration with Tomasz Miksa, co-chair of RDA working group on machine-actionable DMPs. The goal is to set a set of minimum standards in interoperability.

Will invite several DMP tool providers to talk about challenges in implementing interoperability. Will also invite research data management tool providers.

Please suggest data management tools you think DMPonline should exchange information with. Representatives from these tools will be invited to the IDCC workshop.

Ideas:

- DataCite
- FAIR Sharing
- RSpace
- OpenAire
- R3DATA
- euroCRIS
- RO-Crate
- Galaxy
- Esploro (CRIS), Exlibris
- Pure (CRIS)
- Symplectic Elements (CRIS)
- Figshare
- Sherpa Juliet
- DataverseNL
- DANS Data Stations

- ?

## 2. Specification for machine-actionable Grant ID field

Can a user than still choose the template of the institute? As some funders allow this and a institutional template is usually better fitting / fine-tuned. - *We can still have the template associated but we have this additional option, associating the template with the API - they would be compatible*

Asking for all of this information before selecting a template would be ofputting.
Public API for Sweden: https://www.vr.se/english/swecris/swecris-api.html

Sometimes a DMP is associated to more than one grant. Worth considering?
*That's correct. We should add another funder, we will be writing more details specification and share with the community.*

Other issue we might have is the **terminology.** It can be in DMPonline and funder systems and we need to be precise for the user - we need to ensure that the things will move smoothly across the systems.
In **DMPonline -** Data management plans = sometimes referred as projects
For **funders they refer to grants - and grants can fund several projects - it has more layers** - this is why we ar elooking for more examples of APIs to see what terminology to use in order to avoid confusion. We can avoid helpdesk to avoid confusion

Can a user than still choose the template of the institute? As some funders allow this and a institutional template is usually better fitting / fine-tuned.
*If the plan is never funded all works as it worked before. But we have been asked to link funded projects to the database of the funder. It will not be a mandatory field though.*

Margaret from ZonMW This is the M4M template for Project Admin. that can be considered as a controlled vocab for administrative metadata - *https://www.gofairfoundation.org/m4m/*
Grant ID - would be a major addition to the metadata scheme they use and developed. They worked with Oxford Unviersity, they want to have standardised metadata set

Can a user still choose a template of the institute? - the answer is yes. Template selection will be looked at and improved. In netherlands they want to have the institutional template to be the preferred one by default

Joakim - at Stockholm Univesity they like they flexibility to choose which template to use. They have their institutional template, but many users need to use funder templates because that's where they got their grants from and at the top of that they have their swedish research council one which is more text oriented

We should have machine actionable features but we cannot deploy them at the expense usability - so create plan wizard should be potentially work along the grant ID feature

When the grant number is entered the project name does not need to be rewriten. The user should then be prompted - e.g. your project name will be overwritten - are you happy with this

Ida - if the user fills the form - the user might not want to even be asked whether the title should be overwritten, but there might be a case when they have been given the number afterwards so that might not be an issue
If I was an end user I would get frustrated if I filled out numbers in the form and got to grant ID. When that is filled out I get suggestions of the previous fields I have already spent time on filling out.

Think it´s a matter of communication/dialog with the user, order of fields and if they have an old form they want to reuse or start from scratch.

Maybe the API will not fill the form, but can create suggestions to be dragged and dropped into the right field. (?)
I would suggest that the grant ID would be the first thing (on top of the page) to fill out when creating a new template and have a grant ID in place. Then the API gives suggestions of the possible fields to fill out (e.g. drag and drop)

## 3. Machine-actionable grant ID field implementation at OPIDoR

Presenter: Christine Jaquemot

OPIDoR
In 2016 they launched DMP OPIDoR based on the ROadmap code in 2020 - they launched RE3 they added new data models

The feature is available for all templates

At the moment thye have information from french national funder but they are developing to get information from other funders

- They display the title, acronym and grant id - cause it was better for the user
- Once selected they display the title, acronym, abstract of the project and they have all the information in french and in english , there is information about the funder (french agency identifier and link to their policy) and link to the grant ID is there too
- French identifier is highly recommended but is not always filled out

It is not direct call to the funder - because their funder does not have an API
They deposit the information and french repository and try to do it (once a month) and OPIDoR collects the information and that includes the title coming and the grant id and that's how they can show the list and they have web service on the side

Is this compatible with JSON v1.1 API schema - they do not do the validation, ORCiD, ROR they do not use this just yet - there are some requirements that are still difficult to comply with - they have a quite lot of information that is filled within the RDA common standard

- To perform the validation is to keep track what is missing and what could be do the encourage the users to fill this better e.g. ORCiD (some people do not have it, but that might prompt them to make one or some have several ones) - it is very encouraging there is still a lot of work needed

**Summary**

- We will draft more details specifications
- We have a number of offers of people who want to get involved to work on the specification - but if you want to be part of the working group please email us to dmponline@dcc.ac.uk and we will continue working on the specification for the next week and we will come with the estimate timeline for this but we do not want to rush as we need to work in parallel on the new plan creation wizard too

Next user group is on **21 November 2023** - we are looking forward seeing you there

# Development priorities for 2023 -2024, 22 August 2023

Agenda
Start time: 10:30 - 12:00 BST (= UTC+1).

| **Time UTC+1** | **Agenda Item** |
|---|---|
| 10:30 - 10:40 | Introduction |
| 10:40 - 11:05 | Development priorities |
| 11:05 - 11:15 | Discussion |
| 11:15 - 11:25 | Coffee break |
| 11:25 - 11:50 | Research Outputs Feature demonstration and discussion |
| 11:50 - 12:00 | Summary |

Add user group meeting dates to your calendar:

- 19 September 2023
- 21 November 2023
- 23 January 2024

- 19 March 2024
- 21 May 2024

## Roll Call

Name / affiliation / pronouns /  city / social media:

- Diana Sisu / Digital Curation Centre / Edinburgh / @dianasisu, @DMPonline
- Mark Bruyneel / Vrije Universiteit Amsterdam / RDM Support (Library), NL
- Gary Pike / University of Portsmouth, RDM Support/ Portsmouth, UK
- Lindsey Myers / University of York / UK
- Carolin Rebernig-Hedman/ Umeå University library/ Umeå, SE
- Yasemin Turkyilmaz / Data Steward, Delft University of Technology / NL
- Al Wood / Digital Curation Centre / Edinburgh
- Glenys Jacob / Digital Curation Centre / Edinburgh
- Don Stuckey / Digital Curation Centre / Edinburgh / @DMPonline
- Marta Nicholson / Digital Curation Centre / Edinburgh / @DMPonline
- Petra van Overveld, PhD / Central data stewardship expert, Leiden University Medical Center, Leiden, NL
- Soile Manninen / Tuuli Office, University of Helsinki, Finland
- Mirjam Brullemans / Data Steward Radboudumc / Nijmegen / NL

**Meeting notes**

- Introduction
    - Diana informed participants that meeting will be recorded.

- Latest developments
    - DMPRoadmap's version of Research Outputs have been deployed
    - Upcoming development and upgrades:
        - Upgrading OS and moving to new VM (23rd August 2023)
        - New Roadmap release v4.1.0 (includes bug fixes and improved functionality)
        - Bootstrap Upgrade

- DMPonline events
    - DMPonline User Group meetings for the year has been announced (please let us know if there are any specific topics you would like to see discussed)
        - Mark:
            - Would it be possible to discuss Funder templates and DMP template priority if universities have certified templates and how this can be better implemented in DMP Online? (would prefer if users select our template instead of funders)
        - Mark:
            - For discussion with funders by DCC: how do they view Machine-actionable developments where their own systems

are concerned? Would they view this favourably if data could be extracted from DMPonline into their own systems?
        - Nina:
            - Sorry to bring the conversation back to the funders but issue of having DMP only on completed grants is a big change. This is useful place for us to interact as a community
                - Nina:
                    - its a conversation which just happened on the RESEARCH-DATAMAN list. We can talk about it when we get to the agenda point I think? The idea is that only funded grants write a DMP.
                - Soile:
                    - @Nina Lewin We have this system in Finland, biggest research funder (the Research Council of Finland) asks DMP after positive funding decision, it has to be submitted in 8 weeks after the funding decision.
    - IDCC coming up (Feb 19th - 23rd)
        - Diana welcomed any suggested ideas from the user group to discuss at the DMPonline workshop at the IDCC

- Development priorities
    - Goals for this year:
        - Improving machine actionability with ROR
        - Dynamic grant ID field
            - Mark:
                - I would separate the field in two fields:
                    - 1 for grant number and
                    - 2 for the URL.
                - Are grant numbers on a European level harvested? For checks on consistency?
            - plsterlini:
                - When we mint DOIs for data with datacite the Grant URL is included in the metadata. These can be hard to find as they are not included in publications - but they are helpful
        - New plan creation process
            - Petra:
                - For us it would be great if our own template is the first choice for users.
        - RSpace integration (includes changes to API or new API)
            - Mark:
                - Will there be a time when the new API is introduced but the older one(s) are still available? To allow for transition? We use the two current API's for our own systems to extract data.
                - [Glenys answered yes in the chat.]
            - Joakim:

            - We use only v0 + direct DMPexport ( JSON; which I believe gives essentially the same info as API v1) for our own template.
        - Plan versioning:
            - Petra:
                - For us it will already help if we can save a new version when we have to submit an updated version of our DMP halfway of a project and at the end. Now we copy the project instead.

- Research outputs
    - Glenys game a demo and outline of the research outputs feature.

- Dicussions
    - Mark:
        - Is this [RO] feature aligned with Fair Implementation Profiles
            - @mark: as a (dutch) funder, we will also start stimulating FIPs more, so thank you for the question!
            - FIPs = FAIR Implementation Profiles is developed I believe by the GoFAIR Foundation and Leiden University. Is that the same as FAIR impact?
        - Diana:
            - Joy Davidson at DCC is involved with FI project
            - she is working on guidelines for trusted repositories
            - we are working with FI project to align RO feature with it
    - Diana:
        - Is everyone happy with the [design of the] new plan creation wizard?
            - Mark:
                - funders might want to edit their grant id to agree with a DOI standard
                - grant id number generation could feed into the URL
    - Joakim:
        - good we are going in direction of more machine-actionable outputs
        - and good we are getting an integration with ROR
        - would be good to have alignment with metadata scheme and RO feature
            - will be difficult to do given number of templates out there
            - has taken time for repositors to get there
            - maybe we should narrow down the number of templates first
        - we have our own templates and so do not promote the RO feature
        - repos can provide metadata standard plus licences
        - we don't ask for metadata standards because they can be inferred from the repository
        - most users don't know much about metadata standards
            - repos provide export formats for different metadata standards
            - one fo the goals is to comply with RDA scema, which you can do without metadata standards
    - Petra:

        - we are very happy with the RO feature
        - we like that you can select the type of RO; this saves a lot of time
        - we can just select it [the RO type?] and we know we have the right metadata schema
        - we can provide more suggestions / feedback

    - Mark:
        - created some ROs, exported the plans via API, seems there were questions that were answered in output but not answered in source plan
            - Glenys will pick this issue up with Mark offline
        - will discuss RO feature with colleagues at his university
            - will seek feedback from them, and relay feedback to us
            - will do this in September

    - Soile:
        - her team is please with the RO feature
        - RO feature is not that visible
        - searching for repos is not so easy
        - if you download the word version, you can move the RO table to the first page, but this is not ideal
        - would prefer if RO entries appeared at the beginning of the plan and not at the end

    - Mirjam:
        - we should have a research output persistent identifier in the RO feature
        - currently, the research identifier is in the plan section only
        - Petra agreed:
            - we should have a persistent identifier (PID) in the RO feature
            - Dutch funders need this information

- Summary
    - Diana summarised the topics covered.
    - Diana invited any additional feedback on the RO feature from the user group; users can email us

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# Working together on a Plan - 23 May 2023

**Video recording:** Working together on a Plan 23 May 2023
**Slides:** Introduction and demonstration (also linked from timetable below)

## Agenda

Start time: 10:30 - 12:00 BST (= UTC+1).

| **Time BST (= UTC+1)** | **Agenda Item** |
|---|---|
| 10:30 - 10:45 | Introduction - an overview of the latest activities from the DMPonline team |
| 10:45 - 11:05 | DMPonline plan sharing and co-editing. An overview of how users can add collaborators, share plans and co-edit plans. It includes information on plan visibility settings and a brief touch on the feedback function. |
| 11:05 - 11:15 | Questions |
| 11:15 - 11:25 | Coffee break |
| 11:25 - 11:50 | Discussion: who owns the plans? This will give delegates the chance to ask questions about the current data model and raise any concerns. |
| 11:50 - 12:00 | Summary |

## Roll Call

Name / affiliation / pronouns / city / social media:

- Diana Sisu / Digital Curation Centre / Edinburgh / @dianasisu, @DMPonline
- Don Stuckey / Digital Curation Centre / Edinburgh / @DMPonline
- David Wilson / Digital Curation Centre / Edinburgh /@DMPonline
- Marta Nicholson / Digital Curation Centre / Edinburgh / @DMPonline
- Glenys Jacob / Digital Curation Centre / Edinburgh / @DMPonline
- Carolin Rebernig-Hedman/ Umeå University library/Umeå
- Chris Gibson / University of Manchester
- Al Wood / Digital Curation Centre / Edinburgh
- Gary Pike / University of Portsmouth
- Ida Taberman / Swedish University of Agricultural Science /Data Management Support
- Petra van Overveld, central data stewardship expert & senior advisor research policy / LUMC, Leiden, the Netherlands
- Bev Jones / University of Sheffield / she/her / Sheffield UK
- Chris Tibbs / University of Exeter / UK
- Angeliki Andrikopoulou / University of Birmingham / UK

- Katarzyna Dudek / Cracow University of Technology Library / Krakow, Poland / @Biblioteka_PK
- Helen Foster / University of Sheffield
- Lisa Olsson, Sunet + Stockholm University Library, Sweden
- Soile Manninen / University of Helsinki, DMPTuuli
- Mirjam Brullemans / Central Data Steward / Radboudumc Nijmegen / NL
- Magdalena Drafiova/Digital Curation Centre/ Edinburgh
- Add your details, please

**Introduction**

- latest activities from DMPonline team
    - Research Outputs (RO) feature
        - Diana summarised that:
            - many in select user group not ready for RO feature to be deployed yet
            - users want:
                - more guidance on screen
                - guidance on what RO is for
                - guidance on when RO should be completed
                - RO to be completed at end of project
                - institutions to be able to:
                    - customise RO feature
                    - enable/disable RO feature
                - we'll do more development and have another meeting with select user group
                    - we'll start small by adding text to top of RO page
                    - then we'll move to adding guidance to RO page
        - integration with RSpace (https://www.researchspace.com/)
            - RSpace is a data repository service
            - integration would allow users with RSpace repos to cross-reference them with their DMPs
            - an API will need to be developed
                - specification to be written

1. **DMPonline plan Sharing and Co-editing**

- Diana:
    - gave a demo of the sharing and co-editing features in a plan
    - acknowledged that the term "contributors" can cause confusion
    - welcomed feedback/suggestions for any aspects of these features

- Lisa Olsson, Umeå uni, Jürg Brendan, Soile - would like cover sheet ticked by default
    - Glenys explained this feature will be present in the next release
- Mirjam - current roles for contributor too specific

    - Diana suggested having an “Other” option and an associated free-text field for the user to list the roles there, but Mirjam said this could result in a proliferation of roles
    - Mirjam said she specifies roles in the “Write Plan” section instead
    - Mirjam suggested making the Contributors > Roles field optional (i.e. not mandatory)
- Carolin Rebernig - collaborators should be added to the pdf/download option. (Lisa Olsson: by default, preferably.)
    - Diana acknowledged that this was a good point and that we can look into it
    - Marta suggested that we could have a checkbox for whether to include the collaborators in the PDF export
- Minka - history of contributors (could it be added in plan versioning), some users ask for it
- Chris Gibson - there is a possible overlap between contributors and collaborators. For example, a Principal Investigator might delegate responsibility for writing and maintaining a plan to a colleague in the research team

**2. Discussion: who owns the plans?**

- Chris
    - most universities have an IP policy, i.e. typically, IP created by an employee belongs to the university, subject to exceptions
        - typically, one exception is sponsored research where ownership is determined in accordance with the terms of a research agreement / contract
    - Chris’ institution deals with plan owners leaving his institution with the following policies with respect to plans:
        - a plan must have at least two owners, i.e. the owner and at least one co-owner
        - leaver gives all relevant colleagues permissions on the plan
        - leaver removes themself from the plan

- Soile
    - users/researchers have full rights (copyright perspective), but the model is changing so that institutions have parallel rights and funders require rights clearance between the research and the organisation.
    - The biggest universities already have procedures in place.
        - For example, when new staff join, they sign a transfer of rights agreement. These agreements cover research data and materials, inventions (patents etc.) - publications are excluded.
- Carolin
    - in Sweden, universities are considered as part of the state
    - so all DMPs created at a university are considered publically owned documents
    - there is a legal requirement for any member of the public to access those documents
    - Lisa and Ida also agree
    - the plan is saved with the project and belongs to the project

        - and if the project is publically funded, then the plan falls under open-science policy
- Angeliki Andrikopoulou
    - the DMP probably should be treated like other data derived from a project - who owns the data after the researcher is leaving the University- the research data policies state that the university is the owner of the data, so this could be applied to the DMPs, yet it is not always that simple.
    - I think that the individual departments that host the research projects should have a say on the issue.
        - Libraries are not able to make the decisions on such matters, they could just support and guide the research community to meet the relevant policies.
    - from a technical point of view, the current DMPonline system is meeting the requirements
- Following Chris' example of when a user leaves
    - this is an issue that comes up with many documents not just a DMP (Lisa), this would require institutions to have a policy as well not just dmp policies.

**3. AOB**

- Diana Sisu:
    - We are often asked for data-dumps by institutes; we say no for now. How does everyone feel about that?
    - Mirjam: You shouldn't allow for data-dumps; leave that to the institutes.
- Mirjam:
    - I struggle to find plans on the dashboard.
    - I would like to have an "Owner(s)" column added to the dashboard.
    - This could replace the "Shared" column if everyone would be happy with that.

**4. Summary**

- Users would like to include contributors and collaborators in the dmp download.
- Contributors roles are too high-level and need to be more detailed.
- Diana will be in touch soon to set up the next meeting for mid-July.
- Diana will hold a meeting with funders, with a view to understanding their requirements.

# Plan Versioning - 24 January 2023

**Video recording:** Plan Versioning 24 January 2023
**Slides:** Introduction, Plan Versioning (also linked from timetable below)

## Agenda

Start time: 15:00 GMT = 16:00 CET.

| Time | Topic | Presenter |
|---|---|---|

| | | |
|---|---|---|
| 15:00 - 15:15 GMT | Introduction (slides pdf)<br><br>Includes a quick overview of latest development work. | Magdalena |
| 15:15 - 15:45 GMT | Plan versioning (slides pdf)<br><br>An overview of the proposed plan versioning feature. | Diana |
| 15:45 - 16:00 GMT | Discussion (see notes below) | |
| 16:00 - 16:10 GMT | Summary (see notes below) | Magdalena |

## Roll call - Happy New Year!

Name / affiliation / pronouns / city / social media:

- Diana Sisu / Digital Curation Centre / Edinburgh / @dianasisu, @DMPonline
- Magdalena Drafiova/Digital Curation Centre/@DMPonline
- Marta Nicholson / Digital Curation Centre / Edinburgh
- Glenys Jacob / Digital Curation Centre/ Edinburgh
- Mark Bruyneel / Vrije Universiteit / Amsterdam
- Gary Pike / University of Portsmouth / Portsmouth, UK
- Lina Andrén/ KTH Library / she/her/ Stockholm Sweden
- Chris Tibbs / University of Exeter / he/him / UK
- Joakim Philipson / Stockholm University, Sweden
- Mirjam Brullemans / Radboudumc / Nijmegen (NL)
- Mary Donaldson / University of Glasgow / She/her / Glasgow UK / @UofGOpen
- Chris Gibson / University of Manchester / He/him / Manchester, UK
- Soile Manninen /Tuuli Office, University of Helsinki/Finland
- Maria Almbro /Stockholm University/ Sweden
- Jenny O'Neill, UCD Library, she/her, Dublin, @jennyolibrarian
- Beth Montague-Hellen, Francis Crick Institute
- Lindsey Myers / University of York / UK
- Carolin Rebernig-Hedman/ Umeå University Library/ Sweden
- Natalie Clark, Newcastle University
- Kim Davis / University of Plymouth / she/they/ Plymouth, UK/ @kiminthelibrary
- Björn Ericsson / Stockholm School of Economics /Sweden
- Bev Jones / University of Sheffield / she/her / Sheffield UK / @OpenResShef
- Helen Foster / University of Sheffield / she/her / Sheffield UK / @OpenResShef
- Tara Healy / University of Plymouth, UK / she/her

# Plan Versioning

### Introduction

A proposal for a plan versioning facility was put forward and discussed at the user group in November 2021. This is a follow-up to that meeting.

The DMPRoadmap team thought about implementation of the facility and got stuck at a key step: create new plan version. The original proposal enabled the user to create too many versions for a plan and it was unclear what they would be useful for. This user meeting is bringing back to you a key question: why do we need plan versions?

## Discussion

- General advice: keep the plan versioning feature simple from the start, more features can be added later, if needed.
    - ‘I agree, Danny. I would also say that there is a user education/training piece in this. Rather than account for every workflow eventuality, the reality is that if you are using a system you will need to amend your procedures to use the system effectively. If the system tries to cover everything it will end up being overly customised and a bit of a patchwork quilt.’ Lindsay Dowling
- When do we need versions:
    - Most expressed a requirement for keeping a copy of the plan that they had provided feedback on, i.e. a kind of before and after feedback versions of a plan.
    - The plan owner can decide if new versions are needed but keep number of triggers as low as possible. (Danny and others)
    - The version I'd like to have is the submitted version - we encourage living document DMPs, but it can be important to know what you said to the funding bodies originally for final reports so you can address why it changed. (Beth)
- Why do we need a before and after feedback version:
    - Need to know the reason behind the comment at the time of commenting (Danny, Lindsay). At the moment, user can change answers in the same version of the plan. If the org admin returns to plan to see why they left a particular comment, comments and answers are no longer linked.
    - Not concerned if comments have been incorporated in the plan. From the admin’s perspective, the trace of comments is important for auditing purposes (Danny).
- When should a new version be triggered - workflow and changes to UI:
    - Can a new version be triggered when feedback is requested (Chris Gibson) that way the admin can have a copy of it for which they add comments.
    - Other users suggested a new version to be triggered after feedback has been provided, i.e. when the org admin clicks review complete button. Note: since may of you asked about this, not every comment would trigger a version, we never had that in mind!
    - When DMP feedback is requested, send user message asking if they want to proceed.
    - Lock dmp, until feedback complete. Example platform that locks submission during review, Yoda storage platform, https://yoda.yale.edu/ . (Danny).
    - Retract plan after sending feedback request? (Mark) - *possible but this would make it difficult for versioning*.
    - Some org admins are also interested in seeing the version submitted to the funder and version at the end of the project. Perhaps they can be marked in a way that makes them easy to spot - flagged? (Lindsay, Chris)

    - Note that there is a difference between notification for administrators that a plan has been submitted for review and that a new version of plan has been created.
    - Would older versions be editable? Mark says editing older versions will be confusing, especially while reviewing etc. Answer: To be considered. The number of actions that can be performed on each version would be very limited.
    - If a new version is created will the plan ID remain the same. Answer: Yes. There will be a version ID, based on the plan ID.
- Who should be able to create versions of a plan:
    - Only owner of plan should be allowed to create versions.
    - If plan versioning is linked only to before and after feedback, then this could be built into the workflow and have automatically generated ('triggered') plan versions only, but not manual.
- Additional aspects of plan versioning:
    - Would a new version also create a new version on the meta-level? Answer: yes, API v0 and v1 would cater for versions.
    - Will we have to come up with a single solution, one size fits all approach? Answer: Yes.
    - Training for both org admin and end user will be required. Answer: Yes. We will provide both user groups and online training material, e.g. videos, new instructions for org admins on the wiki page.
    - A suggestion from Joakim - comments cannot be downloaded now, but if they could be, then the admin can download the DMP with comments after they add comments, thus versioning wouldn't be required for comments.
    - Can comments be locked so that it cannot be deleted so that admins wouldn't have to download a history of comments? (Lindsey Myers).
    - Format of older versions: don't want pdf only of old versions, because API is used to download plans and keep on register, to get an idea of how plans change over time. PDF wouldn't help in this case. Would like to retrieve data and make sure that it isn't editable. (Mark)
    - How will this affect the API? Get all versions or specific versions? (Mark) Answer: New API call might be needed to get older versions. The current API will get the latest version. Will know more once development starts.
    - An extra field might be useful at the meta level for a DMP indicating how many versions there are, if interesting? (Mark)

## Summary

**Plan versioning**:

- Start simple. Offer as few versions as possible and make it clear why versions are used for.
- At the moment, the main demand for versioning is based on feedback. Users would like to preserve the version of the plan (i.e. answers) on which the feedback was given, and version of plan after feedback.
- There is a worry that in the initial proposal, there are too many triggers for versioning system - cut down on trigger points and offer as few versions as possible.

- Make it clear who can create new versions - possibly limit this to plan owner and administrators. This would make sense based on the current demand for versioning (i.e. before and after feedback).
- Ideally, only the most up-to-date version should be editable.
- If older versions are editable, ensure the user interface makes this clear via the actions offered in the drop-down menu.




- We will need new notification messages for 'new version of x plan has been created'. These would be different in timing and wording for end user and org admin.

**Plan feedback process:**

Review of feedback process is also on the agenda for development but with a later delivery date of 31 October. Given that the plan versioning seems to be driven by feedback, it may be that the feedback workflow has to be reviewed in parallel with (if not instead of?) plan versioning. Some suggestions for improvement were:

- Ability to download comments perhaps via an API. This would mean that every admin could create new processes for how to keep a copy of original answers given by end user and comments comments given by org admin. This could also mean that we would not need a plan versioning facility.
- Lock plan during feedback, i.e. user would not be able to make changes while the plan is submitted for feedback. Issue user with warning that of type 'Your plan is about to be submitted for review and you would not be able to edit it. Do you wish to submit for review? Yes/No'. Give some visual clue on the dashboard that the plan can't be edited - make it faint, or mark it as 'Locked for review'. Some suggested that locking may be a bit restrictive for users and that we should perhaps enable the user to retrieve plan from feedback (however, this would make it difficult for versioning).

**AOB**

- Quick survey on the time for the user group - mornings or afternoons? Give your input at https://form.jotform.com/230233980202041 . Results will be circulated.

**Next steps**

- Ask some end users for their input on why they might need plan versioning
- Re-think workflow for creating versions of a plan in the light of input above and any input from end-users
- Present draft interface at a future user group
- Planned release of plan versioning: 31 August 2023

# New Plan Creation Wizard & Research Outputs - 15 November 2022

**Video recording:** https://youtu.be/D4O7C0FvMDA
**Slides:** New Plan Creation Wizard, Research Outputs

## Agenda

Note all times are GMT. 10:30 GMT = 11:30 CET.

| Time | Topic | Presenter |
|---|---|---|
| 10:30 - 10:45 GMT | Introduction<br><br>Includes a quick overview of latest development work. | Diana |
| 10:45 - 11:00 GMT | New plan creation wizard<br><br>An overview of the proposed plan creation wizard, focused on helping the user select the right template. | Diana |
| 11:00 - 11:10 GMT | Questions | Diana & Glenys |
| 11:10 - 11:20 GMT | Coffee break | |
| 11:20 - 11:45 GMT | Research Outputs<br><br>This is a reminder of the Research Outputs feature, which enables users to add information on types of data, information licences,data storage (repositories), and metadata standards. | Diana |
| 11:45 - 11:55 GMT | Discussion | Diana & Glenys |
| 11:55 - 12:00 GMT | Summary | Diana |

## Roll call

Name / affiliation / pronouns / city / social media

- Diana Sisu / Digital Curation Centre / Edinburgh / @dianasisu, @DMPonline
- Glenys Jacob / Digital Curation Centre / Edinburgh /
- John Pinto / EDINA / Edinburgh
- Al Wood / Digital Curation Centre / Edinburgh
- Nicholas Syrotiuk / Durham University / @DurhamRdm
- Chris Gibson / University of Manchester / UK
- Miriam Braskova/EPFL/Lausanne/Switzerland
- Jane Bonnell/ Nottingham Trent University

- Mark Bruyneel / Vrije Universiteit Amsterdam, The Netherlands
- Merlijn de Smit / Stockholm university / Stockholm
- Mirjam Brullemans / Radboudumc / Nijmegen, The Netherlands
- Lara Skelly / Loughborough University / @/LboroRDM
- Carmen Jambé & Zhargalma Dandarova /University of Lausanne (UNIL) / @OpenScienceUNIL
- Lindsey Myers / University of York, UK
- Lina Andrén/KTH Royal institute of Technology/Stockholm, Sweden
- Greg Simpson / Cranfield University, UK
- Christiana McMahon / UCL / London, UK
- Kersti Laupa/Estonian University of Life Sciences/Estonia,
- Noelle McDougall Abertay University
- Maria Almbro / Stockholm University / Sweden
- Erik Hedman / Stockholm University / Sweden
- Wayne Peters/Imperial College London, UK
- Joakim Philipson / Stockholm University / Sweden
- Kirstyn Radford / University of Hull, UK
- Soile Manninen/Helsinki University, Tuuli Office/Finland
- Lisa Olsson / Stockholm University / Sweden
- Tuija Korhonen / University of Helsinki, Tuuli Office / Finland
- Petra van Overveld/Leiden University Medical Center/Leiden, the Netherlands
- Elena Samonova / University College Dublin / Ireland
- Irina Hope / Digital Curation Centre / Edinburgh

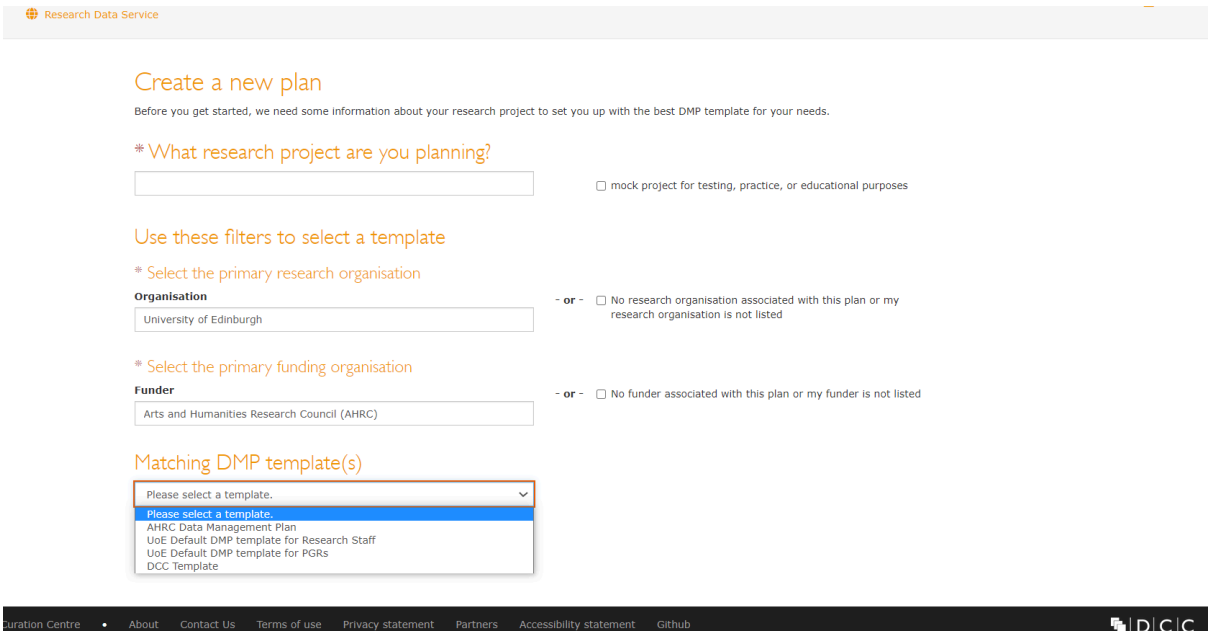
## 1. New Plan Creation Wizard

View presentation slides

Quick summary of proposed changes to the current plan creation wizard:

- Re-word page to emphasise the plan creation page is about selecting the right template
- The organisation and funder fields act as filters that offer users a selection of templates
- Introduce a new field called ‘Matching DMP template(s)’ which contains a drop-down menu of templates available for selection. Field would be permanently on display.

Screenshot enclosed below shows scenario for University of Edinburgh user having entered AHRC as a funder.




**Comments and feedback:**

- New workflow relies on users to select the right template from those on offer. Users can make mistakes when choosing.
- If several templates are on offer, user may assume all templates are OK ('all templates are equal') to use for their DMP, and this is not the case. Funders normally expect users to submit funder template.
- Organisations (universities) can also be primary funders. Users should be able to enter them in the funder field. ACTION: DMPonline team to consider adding universities to 'funder' table.

Question from Petra van Overveld: Will it be possible that if you have a subscription that your own template will be default?
A: If the user has entered their primary research organisation, their organisation template is the default template. If the organisation has more than one template, all organisation templates will be offered for selection.

In a way Petra's question is about the ability to set default templates and is similar to Nicholas Syrotiuk's suggestion:
'I think one solution might be to allow the admin user to decide what DMPs are displayed based on the DMP user's input.' This would be difficult to implement

**Thanks to Joakim Philipson for this tip:**
'We at Stockholm University have now finally published a dataset for our SU-EOSC Nordic machine-actionable DMPs in DMP Online, with our local maDMP template and processing SW scripts and DMP instances examples (output as pdf, html, json and xml). It is found here in Dataverse: https://doi.org/10.7910/DVN/MGZBAL '

To keep an eye on further developments, please see Roadmap issue #2337 at https://github.com/DMPRoadmap/roadmap/issues/2337

## 2. Research Outputs Feature

View presentation slides

This is a new tab on the Plan where users enter the following information:

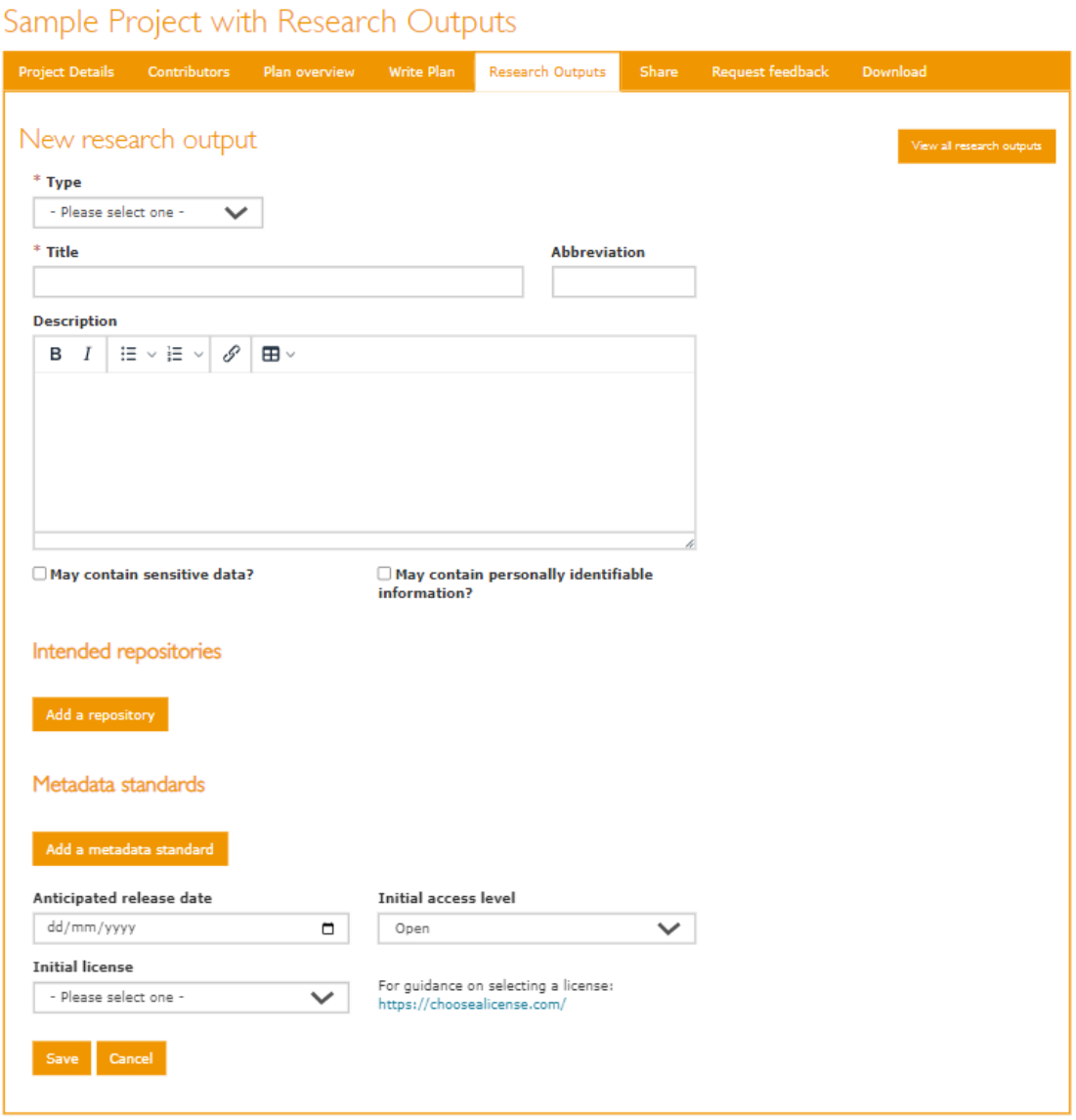
- Data type (e.g. dataset, software, image, etc, options from DataCite), name and a description of the output, size (if applicable), whether or not it contains sensitive info or PII, what the initial access level will be (e.g. open, restricted, closed) and the anticipated publication date.
- Select the repositories they intend to preserve the data object in (e.g. Dryad, Zenodo. List of repositories comes from the RE3DATA registry, https://www.re3data.org/ .
- Select metadata standards (e.g. Dublin Core), options from the RDA Metadata standards catalog, https://rdamsc.bath.ac.uk/ .
- Select an appropriate licence, options come from the SPDX license registry, https://spdx.org/licenses/ .

Fields such as repositories, metadata and licences are machine actionable, while fields such as data type follow glossaries in established RDM resources such as DataCite and and the RDA metadata.

Benefits:

- The information entered in the Research Outputs tab will provide organisations with statistics on data generated by their users, e.g. how much data containing sensitive information is generated, where it is stored, size, etc.
- Encourages users to return to plan to add new information about the data generated by the project.

Screenshot of Research Outputs screen below.




**Comments and feedback**

- Risk of duplicating information - many existing organisation and funder templates already ask users to enter information about data generated by the project. It can be irritating to users to have to enter this information in two different places.
- Prone to error - users will be entering this information without the guidance provided by the template. For example, not all repositories listed on the RE3DATA registry are suitable (e.g. some do not provide persistent identifiers).
- It is not clear to the user when they have to fill in this information. DMPs are normally submitted early on, typically before application for funding. Information on data types will be available at later stages of the project.
- Mark Bruyneel enquired whether some of the fields, e.g. metadata can be included in the templates. ACTION: DMPonline team to investigate this.
- Users generally agreed the feature is useful, subject to addressing issues above.

**Thank you to Chris Gibson who proposed a solution:**

Add contextual guidance on the page to explain:

- Whether it is mandatory or optional to fill in the Research Outputs page. It is optional.
- When should this information be filled in. It is recommended it is filled in before the end of the project.
- Whether the Research Outputs information should be included in the DMP sent to the funder as part of the grant application - No.

We should add a text box at the top of the page, the first thing the user sees, that explains all of the above. Textbox should be customisable by organisations.

In addition, add a link to a document that explains the rationale for the feature:

- What is the benefit of entering this information?
- Who will use it and for what purpose.

ACTIONS:

- DMPonline team to take the points above to Roadmap meeting in December
- Diana to arrange meeting with Mark, Chris, Joakim, Lina, Greg Simpson to talk about ongoing development of the feature.

# How to make the most of APIs - 11 October 2022

**Video recording:** https://youtu.be/BAHfz9Z4PK4
**Full slide deck:** DMPonline User Group 11Oct2022.pdf

**Let us know your thoughts:**
*Please let us know if you have any feedback or questions from the last event to help us answer your questions at the next meeting on Thursday 15 November.*

## Agenda

10:30 British Summer Time (BST) = 11:30 Central European Time (CET)

| Time | Topic | Presenter |
|---|---|---|
| 10:30 - 10:45 BST | Introduction<br><br>Includes a quick overview of latest development work. | Diana |
| 10:45 - 11:05 BST | Overview of APIs<br><br>A quick introduction on how to use the APIs, what data can be retrieved, and some use cases. | Glenys |

| | | |
|---|---|---|
| 11:05 - 11:15 BST | Questions<br><br>This will give participants the opportunity to ask questions about how to use the APIs. | Glenys |
| 11:15 - 11:25 BST | Coffee break | |
| 11:25 - 11:35 BST | How Erasmus University Rotterdam uses the DMPonline API feature<br><br>See Todd's code | Todd Matsumoto |
| 11:40 - 11:55 BST | Discussion<br><br>Participants will be invited to ask further questions and put forward suggestions for improvements to existing APIs or implementation of new APIs. | Diana |
| 11:55 - 12:00 BST | Summary | Diana |

## Roll call

Name / affiliation / pronouns / city / social media

- Marcia Ostrowski/University of Southampton/UK
- Diana Sisu / Digital Curation Centre / Edinburgh / @dianasisu, @DMPonline
- Glenys Jacob / Digital Curation Centre / Edinburgh /
- Marta Nicholson / Digital Curation Centre / Edinburgh
- Al Wood / Digital Curation Centre / Edinburgh
- Merlijn de Smit / Stockholm university / Stockholm
- Miriam Braskova / EPFL / Lausanne
- Lindsey Myers / University of York / UK
- Jenny O'Neill / UCD / Dublin / she/her / @jennyolibrarian
- Gary Pike / University of Portsmouth / UK
- Paolo Brambilla / University of Milano-Bicocca / Milan
- Chris Tibbs / University of Exeter / UK / @chris_tibbs
- Chris Gibson / University of Manchester / UK
- Tua Hindersson-Söderholm / CSC - IT-Center for Science / Espoo, Finland
- Tuija Korhonen /Tuuli Office / University of Helsinki, Finland @dmpTuuli
- Tim Graves/ University of Sussex Library/UK
- Johanna Österåker / Umeå University / Umeå, Sweden / she/her
- Minna Ahokas / CSC / Finland /
- Andreas Hellgren / SSE / Sweden
- Soile Manninen/Tuuli Office/University of Helsinki, Finland, @dmpTuuli

- Lina Andrén, KTH Library/research data team, / she, her / Stockholm, SE /
- Joy Davidson / Digital Curation Centre / Glasgow
- Nikée Groot / RIVM / NL
- Joakim Philipson / Stockholm University / Sweden

## Summary

- Todd Matsumoto has kindly provided customised DMPonline API code

Comments on APIs:
- Text fields with even basic html coding (e.g. bullet point lists, numbered lists) can make it difficult to extract data
- Formatting such as tables are also difficult to process
- Design of the API fed back into design of templates, for example, formulating questions. This resulted in more multiple choice questions and fewer free-text questions, with shorter answers.

**Questions:**
- **Can we number sections/questions to start from 0?**
  Answer: it's a matter of usability. A list consisting of question 1, question 2, question 3, etc, makes sense to the user. A list consisting of question 0, question 1, question 2, etc, is less intuitive. If you tell the user they have 10 questions to answer, and they glance at the bottom of the list and say the last question is number 9, they would be confused. These are busy researchers, they won't have time to check. We want statistics but we mustn't sacrifice usability for it.
- **Can APIs return a list of plans that satisfy certain criteria, e.g. return plans where answer to question 'does this plan contain sensitive data' is 'yes'.**
  Suggestion from Chris Gibson.
  Answer: Yes. Need to write the code.
- **Question from Naeem - would it be possible to export a pdf via an API? Would we consider doing this in the future?**
  Answer: No on both counts. It would be in effect like providing a data dump and we don't do this. Nonetheless, we will check with the wider DMPRoadmap team to see what their views are on this topic.

# 27 April 2022, 09:30 BST (10:30 CET)

**Recordings**: *will be shared after the meeting with the attendees, via email*

## Agenda

| Time | Topic | Speaker |
|---|---|---|

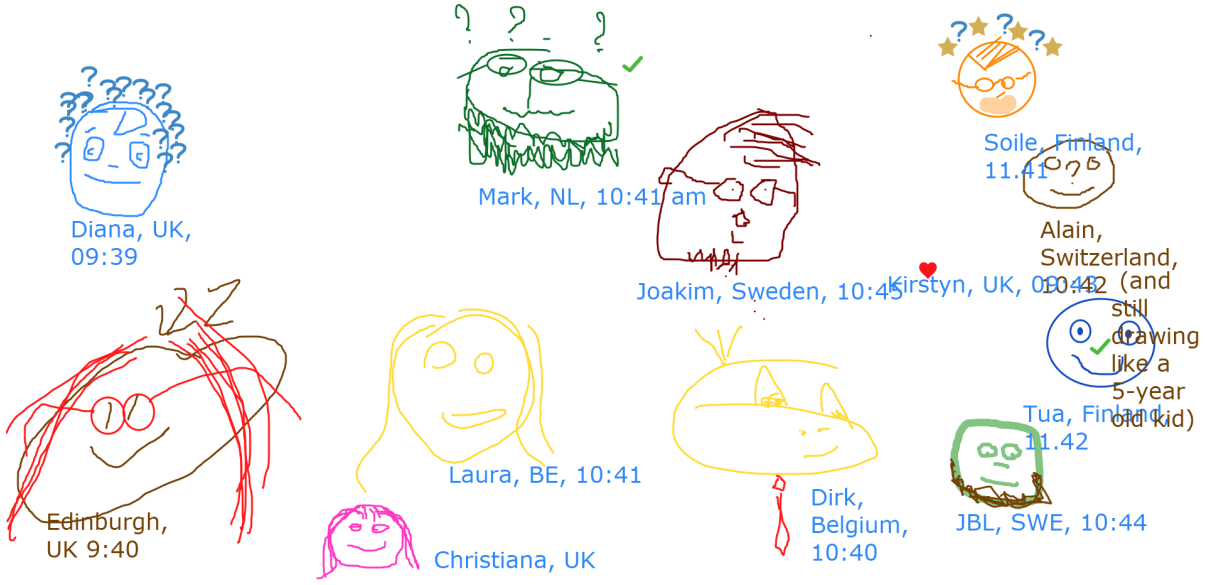
| | | |
|---|---|---|
| 09:30 - 09:50 BST | Intro/icebreaker<br>Welcome to new institutions | Diana |
| 09:50 - 10:10 BST | DMPonline team update | Patricia |
| 10:10 - 10:45 BST | New features from DMPRoadmap / DMPTool | Diana |
| 10:45 - 11:00 BST | Coffee break | |
| 11:00 - 11:50 BST | Feeding back on user groups and DMPonline priorities | Patricia |
| 11:50 -12:00 BST | Outlook | Diana |
| 12:00 -12:30 BST | Social hangout (optional) | |

## Roll call

*Name / affiliation / pronouns /  location / social media*

- Patricia Herterich / Digital Curation Centre /she, her / @PHerterich
- Diana Sisu / Digital Curation Centre / she, her / @dianasisu
- Joakim Philipson / Stockholm University, Sweden /@JoakimPhilipson
- Alain Borel / Ecole Polytechnique Fédérale de Lausanne (Switzerland) / he, his
- Chris Tibbs, University of Exeter, UK, he/him, @chris_tibbs
- Mark Bruyneel, Vrije Universiteit Amsterdam / he / Netherlands  / LinkedIn
- Jürg Brendan Logue, Swedish University of Agricultural Sciences, he/his, Sweden
- Kirstyn Radford, University of Hull, UK
- Laura Standaert / Ghent University / she, her / Belgium / @UGentRDM
- Soile Manninen/Tuuli Office, University of Helsinki (Finland)
- Nataliia Voievoda / Eucor - The European Campus (Upper Rhine region) / QUSTEC PhD programme @QUSTEC_PhD
- Miriam Braskova / EPFL, CH /she, her /LinkedIn
- Tua Hindersson-Söderholm / CSC - It Center for Science, Finland
- Jenny O'Neill, UCD, Ireland
- Christiana McMahon, UCL, UK

As an icebreak activity, participants were invited to draw their mood. Image inserted below.




## Notes

### DMPonline team update

Slides: DMPonline-user-group-update-Apr2022.pptx

- Joakim Philipson: as an administrator, I can add myself as a contributor but can't remove myself. The available options should be that I can add myself as well as remove myself, or not be able to add myself at all.
- Miriam Braskova: RSpace - is it on the roadmap (yes), what is the timeframe for it (unclear for now).
- Mark Bruyneel: API usage, how good is the guidance on Wiki, we're considering using it, using Python script on the server. Is there anything that we need to be aware of in terms of server capacity? Answer: no, server capacity should not be an issue now. ACTION: Diana to send documentation to Mark. Patricia to check with developers if anything is missing from the documentation.

### New features from DMPRoadmap / DMPTool

Presented features in release https://github.com/DMPRoadmap/roadmap/releases/tag/v3.1.0

Questions from DMPonline team to you:

1. How much notice would you like us to give you before we turn on the new features (research outputs, collapsible guidance)?
    - MB: a month ?
    - AB: we don't have a large existing users/plans base to support yet, so new features are always welcome and will not disrupt anything important. But obviously it will change as the service matures in our institution.
2. Are the current resources pulled in the right ones? (We can revisit)
3. Research outputs:

    - Integration with RSpace, https://www.researchspace.com/
    - Are additional options at the Research Output based on ideas related to FAIR? Answer: what is currently used is RDA's machine actionable DMPs that started before FAIR. FAIR principles are not too far away from RDA's principles. Implementing FAIR will be looked into, but we don't have a clear timeline for this.
4. What metadata standards are being used?
    - RDA metadata catalogue
5. What repositories are being used?
    - R3 data for repositories, https://www.re3data.org/
6. Can we manually add metadata standards or in-house repositories?
    - Not as things stand, we need to investigate with developers whether this can be done.
7. Selecting research domains - is it possible to select several
    - Not at the moment. Need to ask developers whether it would be technically possible.
8. Can some of the features be switched off for individual templates.
    - Unlikely. Will check this.
9. Can features be customised per institution, e.g. research domains, metadata standards.
    - Unlikely. Will check this.
10. Should DMPonline implement featured plans facility available on DMPTool, https://blog.dmptool.org/2022/03/10/things-to-know-about-the-updated-dmptool-website/
    - Participants thought this was a useful feature, particularly because it comes with a search facility by facets such as funder, subject, etc
    - Would like the facility to enable featured plans within an institution.
    - Plan being marked as 'featured' could work as an incentive for researchers and it may also improve the rate of published plans (getting researchers to publish their plans is a priority for organisations)
11. Do you think at some point it would be needed to add the option for a DOI for a DMP? Answer: not sure DMP authors are comfortable with publishing their DMPs. We can look into this.

### Feeding back on user groups and DMPonline priorities

Slides: DMPonline-user-group-priorities-feedback-Apr20221.pptx

- Versioning remains a priority
- In Belgium, some institutions are also interested in CRIS integration
- Revision of DMPonline-related events
    - Mentimeter results DMPonline_future_events_mentimeter.pdf
    - Note: you can also fill in survey at https://www.surveymonkey.co.uk/r/VYVHHSX by 10 June 2022.

## Outlook

- Will investigate with DMPRoadmap team all issues you raised to day.

- Next user group meeting may take place in the autumn, possibly week beginning 17 Oct. This depends upon the results of the review of events carried out at today's meeting.
- Next drop-in meeting will take place on 17 May. Guest speaker is Dr Mellanie Geijen, Data Steward, Open University Netherlands. For joining instructions see
- https://www.dcc.ac.uk/events/dmponline-drop-sessions .

Thanks all participants for their input and feedback!

# DMPonline user group 2 November 2021 - 9:30 - 12:30 GMT

## Update from the DMPonline team

A summary of the update is in this video, https://docs.google.com/document/d/1JbIQblu_JC33T2O2wGN-9boZU0_d-LAYMrHl_j3bOaM/edit#

One important thing to note is that DMPonline is now up to 62 customers, including major national contracts. This is becoming a big user community! DMPTuuli has over 50 organisations.

## Versioning update

This refers to keeping track of versions of a particular data management plan (DMP).

The slides that give a summary of the proposed specification for the versioning facility are here: https://docs.google.com/presentation/d/1ju2fMPCsDEfDc5efGrOmxtlEsAeC3ar7/edit?usp=sharing&ouid=104600272420987615641&rtpof=true&sd=true

Questions:

- Will new versions keep the original plan ID. Answer: yes. The URL will also include plan ID, as well as the plan details page.
- When downloading via the API (v0/v1), will there be a new parameter for version in the API? Answer: yes and it will be aligned with the machine actionable DMP standard. We've already looked at the concept of time stamps. We will make sure there will be some field in the API to identify versions.
- Will versions always be used? Or will there still be plans without versions? (user chooses to answer questions and save the answers but never hits the 'create version' button: is this still possible?). Answer: in this case the plan will be version 1.

- 'Version history' in action menu on my dashboard would be more clear than 'access version'? Answer: unclear yet, we will do some basic user testing to make sure the dashboard works.
- Versions will they be created automatically? Answer: there will be three ways to create versions - automatic, manual, and triggered by certain events.
- If I recall correctly, at present, if you copy a DMP, the new copy records the same DMP ID as the original DMP even though the new copy takes a different URL. Can this be fixed so that the URL and ID are always consistent? Answer: we will double-check this and it will be addressed by versioning so that different DMPs have different IDs.
- DMP title - can you modify it when you create a new version? Answer: the project title will remain the same, but the details, including plan title, can be changed.
- Will it be possible to link directly to a specific version (e.g., will each version have a unique URL)? Answer: unsure, but it must be possible since there is a URL. Must check with our developers. Participant states it must be 'essential' if it is to work with the API.
- But if I understand this sheet correctly, then you will only see the version of your template here? Answer: we have to look into this further. Admins need to know what version of the template a plan has been based on (e.g. whether a question has been answered).
- It would be useful to us to trigger a new version automatically when a plan is submitted for feedback, so that we could see the original we commented on not the text including their responses. (Bev, Sheffield)

Discussion:

- This looks great but we are concerned that there will be too many versions and too much data to back up. Answer: we are aware of this and looking into it. Our system already saves DMPs automatically in the background, as different versions.
- Versioning will also apply to test DMPs. Is this OK? Overall participants answer yes.

Overall, participants seem to approve of the plan, there are no negative comments to the proposed versioning facility.

## Possible DMPRoadmap features from CDL

- Overview of developments within DMPRoadmap
- Demo: research outputs within DMPTool (5 min). Recording of demo available at https://ed-ac-uk.zoom.us/rec/play/Y8p4Q2DAPUr3bOY8dQbm01tk5K3Qi40UZTRNTgV4aj13kzfOhlESCRdGP2zJwlGhrUEhWmp4oP-CEiXP.q6gQE3aCDa5s5R6P?startTime=1635427276000
    - Discussion: Should this be a feature in DMPonline? As is? What would need to change to make it a useful DMPonline feature?
        - Positive reaction from participants to the 'Research outputs' tab
        - It is already very helpful that we can print it, because at Dutch funders we also have to submit this info.
        - Suggestions for improvement: add related works in the 'Research outputs' tab, not the project details; synchronise with ORCID

        - What is the use case? Answer: this was developed as part of a funded project called FAIR Island, which is working on FAIR policy and bringing it together with DMPs and machine-actionable DMPs. The project DMPs have to be connected with the funder database and the main incentive is for the funder to keep track of the research outputs.
        - Currently, there is quite a bit of duplication. The user is expected to enter the same information in different locations, e.g. project details, the plan itself, the 'Research outputs' tab. The feature needs to be refined.
          Petra (LUMC): this will mean for me, that I will take these questions out of our template and just put in the text like 'yes, I have (new) datasets and they are listed on the 'research output' tab'
        - Overall, the feature was well received by participants.
        - The DMPonline team will ask our collaborators at CDL to put this into the shared code. Please note that any feature that we will add will be tested.
    - Questions:
        - Yes very useful [referring to the 'Research outputs' tab]! Is the info submitted in this tab exportable eg to Datacite/Crossref as appropriate, and could we add our institutional repositories to the 'intended repository' field? Answer: Yes, up to a certain extent.
        - Can you use it both for new datasets that you will create and for datasets that you will re-use? Answer: yes, you can set the release date into the past. You can also use the 'Related works' in the project details.
        - Are these fields (Repositories, Metadata standards, ...) repeatable? Answer: yes
        - If a user has included a dataset here we'd want to be able to pull this into our repository when depositing the dataset there. Answer: unclear
        - Would it work with Pure? Answer: yes, the API could provide a feed.
        - Can you synchronise it with ORCID? Answer: see discussion for next feature (i.e. minting).
        - Research outputs - intended repository option,  will you customise it to add the institutional repository for selection? Answer: I understand this is an improvement that the CDL will be working on, but I don't know what the timeline is around this.

- Demo: DOI minting and ORCID integration within DMPTool (5 min). Recording of demo available at https://ed-ac-uk.zoom.us/rec/play/J76dqI2z6e2MF5e1xbZTlzhCNgNmaQlnzbaGbG_v6R0m8vIU3MvDs_oz4m88ou9EAxaFfQunBe9R4Wlp.gWNlu-HFSCLp-KGS?startTime=1635428053000
    - Discussion: Who should mint DOIs for DMPs in DMPonline? Where should the landing page be hosted and what should be displayed?
        - It was received as a 'useful' feature. Comment: 'I believe several repositories  accept DMPs as resource type already, so they could be used for landing pages'

        - ‘Or, conversely, if you could also import an item (with DOI) from your ORCID record to populate the Research outputs (Repositories, Metadata standards - that are often linked to repositories, Licenses etc.) …’
        - ‘our DMPs are all on private, so not a feature we need’. Note that having a plan visible is not a requirement for minting.
        - ‘If you can link it to the info on your ORCID page, is maybe also sufficient at first?’

    - Questions:
        - The research outputs loaded on DMP tool will they be assigned a DOI? Answer: yes.
        - Would DMPonline facilitate then a landing page for the published plans? Answer: at the moment we are not a DataCite member, we would not be able to mint DMPs. Related question from Patricia: should we provide this as an interface but the actual minting would be provided at institutional level, e.g. your institutional repository? We could also integrate with Zenodo? No answer from users, but there seems to be less enthusiasm for minting.
        - How would DOI versioning be managed? If the DMP metadata is updated after minting the DOI, is a new DOI version automatically created? Answer: we don’t know, we will ask the CDL team and get back to you.

Overall, the ‘research outputs’ feature was better received than minting.

# DMPonline user group - introducing voting on features, 8 June 2021

8 June 2021, 09:30 (UK)

**Join the call:** https://ed-ac-uk.zoom.us/j/86783267000
- Meeting ID: 867 8326 7000
- Passcode: 9uNTMG1y

**Recordings**: https://youtube.com/playlist?list=PLL50Mkpxn0YxiR_gjeBAd1K8pQ7Y_9_i9

**Agenda:**

| Time | Topic | Who |
|---|---|---|
| 9:30 – 9:50 | **Intro and icebreaker**<br>presentation | Magdalena to welcome & all |

| | | |
|---|---|---|
| 9:50 – 10:30 | **Update from the DMPonline team, opportunity for Q&A**<br>presentation | Kevin,<br><br>all for Q&A |
| 10:30 – 11:00 | **Voting on features/issues**<br>Presentation<br>Voting on features doc | Patricia |
| 11:00 – 11:30 | Coffee break | - |
| 11:30 – 12:20 | **Discussing prioritized features** | Magdalena / Ray on implementation aspects |
| 12:20 – 12:30 | **Outlook and wrap-up**<br>presentation | Patricia |
| 12:30 – 13:00 | Social hangout (optional) | - |

**Roll call**

*Name / affiliation / pronouns / location / social media*

- Patricia Herterich, DCC - DMPonline, she/her, Edinburgh, @pherterich
- Magdalena Drafiova, DCC - DMPonline, she/her, Glasgow
- Ray Carrick, DCC - DMPonline, Edinburgh
- Diana Sisu, DCC, she/her, Edinburgh
- Marta Nicholson, DCC - DMPonline, Glasgow
- Ray Carrick - DMPonline, Edinburgh
- Kevin Ashley, Director, DCC - Edinburgh
- Madeleine de Smaele
- Adam Harwood
- Amy
- Andreas Hellgren
- Beverley Jones
- Chris Gibson
- Damian
- Danny Thie
- Hanna Lindroos
- Helen
- Jacques
- Jet Zoon
- Joachim Ekebom
- Kerry Miller, Research Data Support Officer, University of Edinburgh
- Malin Ekstrand
- Mark Bruyneel
- Matt Mahon
- Peter Gavelin
- Petra van Overveld
- Rory Macneil

- Rosa Lonneborg
- Sofia Andersson
- Soile Manninen
- Christopher Tibbs
- Joachim Philipson

**Update from the DMPonline team**

- Sam Rust, lead developer, left the team, joined a small IT company
- Sarah Jones, project manager, left the team and moved to Geant in The Netherlands
- Recruitment is underway for two new posts
- Looking to improve both the tool and service management
- Features - upgrade to Rails 5; resolve issues with single sign-on (SSO); integration with other systems
- Update agreement for customers within EEA to update 'model clauses' to allow continued data exchange
- Pricing - anticipate modest rise for the long-term
- What is a user group for: we give you updates and tell us about our plans; you let us know what you would like to see in our development plans. A two-way communication and feedback.
- DMPonline is a service, based on an open source code base, DMPRoadmap. Today's discussion about the service - DMPonline.
-

**Q & A notes**

From Mark Bruyneel to Everyone: 10:04 AM
Are the SSO test servers from Surf not sufficient for the testing?
Answer from Ray: we need credentials from the live IDP and we must put in place a procedure for obtaining these. Test servers are great for developing functionality but when we face problems with institutional logins then the live system is going to much easier.

From Rosa Lönneborg to Everyone: 10:08 AM
We at KTH have had no problems with SSO using local kth-id connected to the federated Swamid auth. service -works for us and probably the other Swedish Universities then (?)

From Hanna Lindroos to Everyone: 10:09 AM
Only doing testing so far at SLU, but it seems to work fine with SSO (so far at least…) :)

Q: From Mark Bruyneel: how can we make DMPonline a more robust organisation i.e. build a bigger team to avoid being affected by staff departures?
A: From Kevin. We have a robust financial model and we have reached a size that makes the service sustainable. With new staff appointments we should be in a better form by the end of 2021.

From Adam Harwood to Everyone: 10:18 AM

Is there a precedent for asking for credentials for debugging,  set by other similar organisations?
A Ray: I believe so. Most services which use institutional IDPs are within the university and so not so much of an issue but where a service is external I believe it is not uncommon. We can investigate this more if useful.

From
From Matt Mahon to Everyone:  10:22 AM
So in that case can we leave your request for test credentials to one side for now and expect to be contacted by you in the event that an issue arises where you might need our institutional credentials to resolve them?
A Ray: That sounds right to me
From Mark Bruyneel to Everyone:  10:24 AM
examples would be great if you could provide them
A Ray: we'll look into this.

**10:30 - 11:00 Shortlisted issues and voting**
Link to the document:
https://docs.google.com/document/d/1OUiiNQ3C-kPqYfdaVSj-uQQDPJ3b1hvJ2ChPXYP47gM/edit?usp=sharing

**11:30 - 12:20 Discussing prioritised features:**

- We have a long list of issues, which can be viewed on GitHub at https://github.com/DMPRoadmap/roadmap/issues
- We would like you to help us prioritise issues to be worked on so you are invited to vote on your top issues, your priorities

Issued discussed:

- First pitch - when you log in - so your profile info - e.g.your name, country, ORCiD and other personal profile information comes through - so if you could connect different different systems and pass the personal information among the systems - similar to Surf login .Ray's comment  Information we get from local IDP is very limited at the moment. Second level they are talking about is how do we interact with other systems e.g. personal information. Two pieces of work - one we can get from IDP and how do we interact with other systems to harvest useful information from them.
- Admin profiles to be used to automatically trigger signal admins on changes in dmps? It would also be convenient to only see those DMP's for a specific number of fields of science - another issue that requires making more out of pulling information from user profiles; dependent on versioning as well.
- The possibility to use Radio buttons for conditional routing. Radio buttons is an important feature and conditionality should work with them. Ray pointed out that the way we've implemented conditional questions is cumbersome and needs to be re-designed. This was also pointed out during the DMPonline usability exercise.
- Autosaving - e.g. conditional questions if we have radio buttons once they selected one of the options they have to hit save before it removed the conditional questions - they might not press save prior getting through the list - and these might have been eliminated. We need to revisit conditional questioning and how do we use it at the

moment. We should be able to go back and re-design the whole area and make sure this works much better. It is not fit for purpose at the moment. It needs revisiting in near future.

- Trigger version at specified actions, so it is possible to see what changes result from or are subsequent to which actions - this is to do with versioning.
- Chris Gibson - suggested to link two features: allow admins to comment proactively on a DMP (you don't have to wait for researcher to submit feedback request) would work well with versioning (if the admin gave feedback, what action did the researcher take as a consequence).
- Mark Bruyneel - implement triggers within the system, e.g. somebody fills in a field that says 'this is final' (completed a particular action in a version, or completed a DMP), then this triggers a notification to the org admin.

Voting:

- Give +5 to the your top priority issue, +1 to your lowest priority issue
- Vote at https://docs.google.com/document/d/1OUiiNQ3C-kPqYfdaVSj-uQQDPJ3b1hvJ2ChPXYP47gM/edit
- Plan creation wizard - funder is associated with the plan - they want their own template to be visible

Outcome of voting:

1. Versioning (61)
   Q: What is versioning?

   Petra: usually they write a DMP and hand it in to funder at start of project (v1), half-term review (v2), end of project review (v3)

   Hanna: they need to archive the DMP, therefore they need a "mark/tag" that indicates which version was submitted to the funder and needs to be archived

   Bev: don't add tag names e.g. 'submitted', because these names will mean different things to different people. Use a timeline - e.g. version before or after comments. Using a timeline would also be an indicator of time spent on a DMP. Should be able to export DMP with feedback.

   Ray: it's clear that we will have to enable customisation for versioning because institutions will use this feature differently.

   Mark: agrees with Bev that adding names could be confusing, so far we talk about stages after this is in a shape that it's ready for review, we also might need to add some versions before they are ready, export version for the comments - DMPonline might not be the system where versions that are sent off are kept (maybe if integrated with other systems, e.g. a CRIS).

   Kerry: two different concepts: "track changes" for the document to understand who wrote what (not sure if possible - this might become difficult), another is the "versioning" where you take a snapshot of a version that is then

frozen/archived and cannot be changed, so any changes from them on are basically on a new copy.

Ray: by tracking changes we mean taking snapshots.

Rosa: “snapshot” triggered by the user, option to add a commit message to label it? That then triggers/follows up with an event (outside the system, step 2)

Patricia, Hanna, Rory: doesn’t matter what you call the version (e.g. could be a number), just implement a versioning system, where old versions can still be accessed, and leave it to the institution to decide what to do with the versions (which can be done via the API, for example). It comes back to Ray’s comment that institutions can customise what they do with their versions.

An additional point: different versions of a DMP can be used for different purposes e.g. version x was sent to funder, version y was archived.

Chris: agree with most things so far. If a researcher creates a version (by pushing a button) , they can add a little comment what they labelled.
Also allow the admin to trigger a version with comment as well.

Chat:
From Rosa Lönneborg to Everyone: 11:43 AM
to me it seems reasonable to distinguish between versioning triggered by the user saving at any time and sending a specific version to Review or to a funder, where the send action may trigger other actions such as archiving a copy
From Kevin Ashley to Everyone: 11:44 AM
Some of these requirements are about tracking events in the life of the DMP as opposed to versioning specifically
From Rosa Lönneborg to Everyone: 11:45 AM
so automatic version Control triggering a version saved by user AND then a send function where you can e-mail/send via API to other systems
From Hanna Lindroos to Everyone: 11:45 AM
@rosa - yes, but the version that you send off to other systems must be saved!
From Jacques to Everyone: 11:46 AM
Agree with snapshot versioning, track changes is not that necessary imo.
From Rosa Lönneborg to Everyone: 11:46 AM
but that is done by the first part, the VCS system where all versions are saved

2. Integration with CRIS systems (37)

    - Pure, Worktribe
    - 7 different systems in Sweden
    - CRIS systems are under development and institutions are also still testing which system works best for them

- CRISs don’t have very well developed APIs, difficult to integrate with them; data repositories are better from this point of view
- We might address this as customisable API that export to various systems
- Information flow, which way?
- What information should be communicated through the API
- What’s needed? Which metadata fields are needed for a CRIS system?
    - Do we need to add more fields to DMPonline?
    - API only exports JSON
- Soile pointed out that systems such as Pure can be difficult when it comes to data extraction.

3. Reworking guidance (28)
    - Levels of guidance? (general advice/ detailed advice). This is for the org admin not for the ordinary user.
    - Themed guidance - several universities are not using it because it becomes repetitive (i.e. if you have several questions on ethics, the guidance gets repeated). Unclear how to fix this.
    - Mark Bruyneel suggested that it should be possible to choose specific vs general level of guidance for each question.
    - Adding more granular guidance would require integration with guidance that is already on the system.

4. Allow admins to proactively comment on DMPs (26)
    - Ray - this is to be implemented after we have a versioning system, then figure out workflows for feedback

5.