DMP Online and DMPTool: Different strategies towards a shared goal

Martin Donnelly
University of Edinburgh
martin.donnelly@ed.ac.uk
@mkdDCC

Andrew Sallans
University of Virginia
als9q@virginia.edu
@asallans
Running order

1. Impetus for DMP Online development
2. Background to the US-UK collaboration & impetus for DMP Tool
3. Differences in requirements
4. Tabular comparison of tools and functionalities
5. Partnerships (DMP Online | DMP Tool)
6. Outcomes achieved so far (DMP Online | DMP Tool)
7. Next steps (DMP Online | DMP Tool)
8. Joint next steps, shared goals and shared experiences
1. Impetus for development

- DMP support developed to meet funders’ increasing requirements
- Growth of DMP Checklist, and feedback received
- Need for smarter solution than a paper checklist
- Desire to provide more tailored guidance at point of need
2. Background to the US-UK collaboration & Impetus for DMP Tool

- Announcement of NSF mandate
- Conversations at IDCC in Chicago (December 2010)
- Experimentation with DMP Online code – not suitable
- Decision to develop a separate tool
3. Differences in requirements

- Mapping to a checklist vs direct answering of funder requirements (philosophical)
- Institutional ‘ownership’ vs national service (cultural)
- Authentication processes (technical / organisational)
- Tabular comparison...
## 4. Comparison of tools’ functionalities

<table>
<thead>
<tr>
<th>Feature</th>
<th>DMP Online (v3.0)</th>
<th>DMP Tool (v1.0)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authentication</td>
<td>Username and password</td>
<td>Shibboleth or username/password</td>
</tr>
<tr>
<td>Associated guidance</td>
<td>Can be customised for each template</td>
<td>Funder + Institution</td>
</tr>
<tr>
<td>Templates</td>
<td>Multiple</td>
<td>Funder + Institution</td>
</tr>
<tr>
<td>Licensing</td>
<td>Free to use. Hope to make Open Source in time.</td>
<td>Open Source (Bitbucket)</td>
</tr>
<tr>
<td>Logic / approach</td>
<td>Funder requirements mapped to a generic Checklist (rules-based)</td>
<td>Direct answering of verbatim requirements</td>
</tr>
<tr>
<td>Export</td>
<td>PDF, HTML, CSV, TXT, XML, RTF, DOCX</td>
<td>PDF, TXT, RTF, URL</td>
</tr>
<tr>
<td>Sharing</td>
<td>Granular permissions to enable sharing / transfer of plans</td>
<td>Read-only sharing via URL</td>
</tr>
<tr>
<td>Hosting</td>
<td>Virtual environment at Edinburgh. (JANET in future?)</td>
<td>Hosted by CDL, but anyone can run their own instance (minus the database content)</td>
</tr>
<tr>
<td>Liaison with funders</td>
<td>Close to endorsement from multiple funders</td>
<td>Viewed positively by funders</td>
</tr>
</tbody>
</table>

---

**DMP Online**
Guidance and Resources for your Data Management Plan

**DMP Tool**
The DC Data Management Planning Tool
5a. DMP Online partnerships

- Checklist and interface developed via iterative community consultation process
- Recommended and supported by JISC
- Generic guidance developed with the UK Data Archive
- More tailored guidance being developed with the funders / UKDA. (Endorsement by funders also being sought.)
- Disciplinary guidance and worked examples developed with JISC MRD projects (DMT Psych, DATUM for Health...)
- More JISC MRD projects adapting the tool for institutional contexts
- Partnering with DMP Tool, and involved in conversations with European Commission, Australia...
5b. DMP Tool Partners

• CDL/UC3
• UCSD
• UCLA
• Univ of Illinois
• Smithsonian Institution
• Univ of Virginia
• DataONE
• Digital Curation Centre
6a. Outcomes achieved so far (DMP Online)

- At December 2011, we have just under 800 registered users
- Wide differential in creation of plans for different funders
- DCC’s data management planning resources are cited in the STFC data policy and supported by other funders
- Checklist has been adapted by institutions on both sides of Atlantic
6b. Outcomes achieved so far (DMP Tool)

• At December 2011, we have 548 registered users
• 14 funder templates in place
• 10 Additional institutions with Shibboleth configured
• DataONE workshop for scientists (Santa Fe, May 2011)
• NSF data management workshop position paper (Princeton, July 2011)
• Beta testing at ESA meeting (Austin, TX, August 2011)
• Other presentations at DLF, IDCC, CNI
• Online webinar organized by CDL (November 2011), linked to tool launch
7a. Next steps for DMP Online

• DMP Online v3.0 will launch in early 2012
  – Overlaying multiple templates
  – Granular sharing of plans
  – Endorsement from funders (TBC)
  – Several other new features

• Closer integration with a greater number of systems, including RCUK’s J-eS and the JISC MRD projects

• Standards development?
7b. Next steps for DMP Tool

- Continue ongoing weekly conference calls
- Gathering feedback and survey results
- Conversation with Funders about data management plans and the integration of the DMP Tool
- All hands meeting January 2012
  - Discussion of future development priorities
  - Identify resources for priorities (programmers & funding)
  - Discussion of potential organizational and project models
8. Joint next steps, shared goals and shared experiences

- Continuing collaboration and alignment of effort, keeping channels of communication open to share good practice
- Expansion to include other countries and funders
- A commitment to trying to address local/national needs while also recognizing that research is increasingly global and that researchers have to face DMP requirements on many fronts
- Recombining the tools is an ongoing future goal...