

# JLSC

ISSN 2162-3309 | JLSC is published by the Pacific University Libraries | <http://jisc-pub.org>

**Volume 6, General Issue (2018)**

## **Product Review DMP Assistant**

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Black, E. (2018). DMP Assistant [Product Review]. *Journal of Librarianship and Scholarly Communication*, 6(General Issue), eP256. <https://doi.org/10.7710/2162-3309.2256>



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## PRODUCT REVIEW

*DMP Assistant*

developed and hosted by the Portage Network

Accessed March 8, 2018 | Free

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For librarians working in the field of scholarly communication, an emerging area of importance is research data management (RDM). Cox, Kennan, Lyon, and Pinfield (2017) conclude that there are opportunities for librarians to engage more fully in RDM, and the promotion of tools that assist in data management planning is a means of doing so. One such tool is the Data Management Plan (DMP) Assistant, a data management planner hosted by Portage, a Canadian research data management network launched in 2015. Free to access, and open to anyone seeking assistance with data management, the DMP Assistant is a timely and useful first step for project planning.

The push for more robust RDM in Canada is largely due to changes in federal funding through the Tri-Agency granting bodies. Evidence of good data management has not been required for federal grants, but a policy requiring RDM plans and institutional strategies for RDM support is forthcoming (Cox, Kennan, Lyon, & Pinfield, 2017; Lucas, 2017). The DMP Assistant was developed using the DMP Roadmap, an open-source platform for DMP creation that came out of a collaboration between the Digital Curation Centre UK (University of Edinburgh) and the University of California Curation Center. The United Kingdom's DMPonline and the United States's DMP Tool, upon which the DMP Roadmap is based, have served as national resources for researchers for several years. The number of regionally specific installations using the DMP Roadmap, including the DMP Assistant, has grown to almost 20.

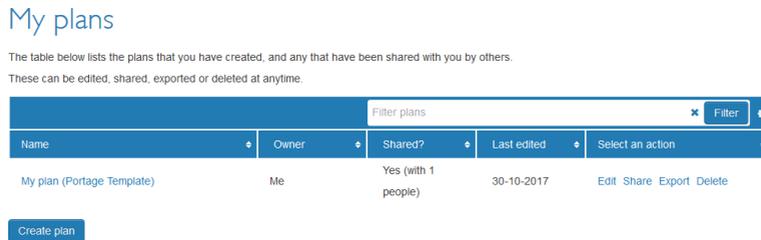
The ability to customize installations of DMP Roadmaps is valuable, as the requirements for RDM vary by country and funding agency. Templates that reflect funding agency requirements, for example, are commonly integrated into regional DMP tools. As there are



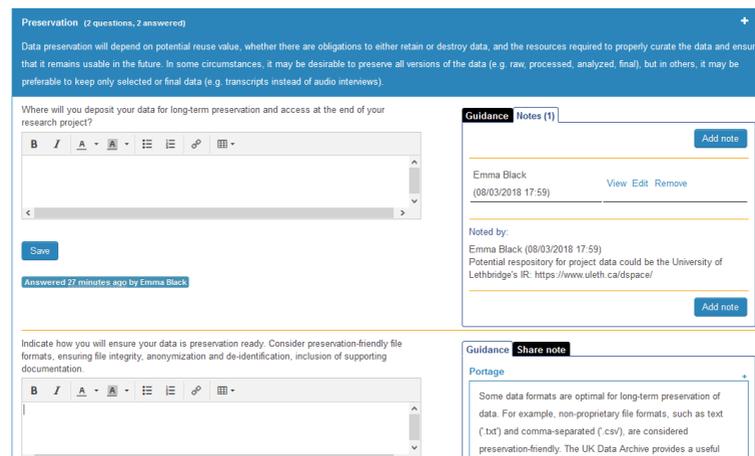
no specific requirements in Canada yet—only suggestions—Portage has created a generic template that provides general guidance on RDM best practices. The DMP Assistant has also been made available in both French and English. As the basic functionality of each DMP tool developed from the DMP Roadmap is extremely similar, switching between tools will be an easy task for any researcher who is familiar with one of them.

Portage has collaborated with a number of Canadian universities and colleges. These institutions may create their own templates that include specific ethics protocols or DMP policies for their researchers. Users of the DMP Assistant may choose to associate their DMP with an institution or sign up without one.

Research teams may opt to have one member or the whole team sign up. Principal investigators on a project are able to add collaborators to a DMP and set the shared permissions to read-only, edit, or co-ownership (see Figure 1). Additionally, collaborators may share notes as the plan is being developed with the time and date of last edits being displayed alongside the editor’s name (see Figure 2). Thus, long-distance collaboration is made simpler.



**Figure 1.** DMP Assistant homepage – Table listing created and shared plans



**Figure 2.** Portage Template – Preservation section with questions, guidance, and collaborator notes

The goal of each tool is to walk users through a range of questions related to RDM that will guide them through the research cycle. The DMP Assistant draws attention to seven areas that contribute to a healthy data life cycle: data collection, documentation and meta-data, storage and backup, preservation, sharing and reuse, responsibilities and resources, and ethics and legal compliance. Each section asks two to three questions that help to identify what steps have already been taken, as well as to highlight any gaps that are present (see Figure 3). Guidance for each question is provided through either the generic template that Portage has created or the associated institution's template.

The screenshot shows the 'My plan (Portage Template)' interface. At the top right, a blue progress bar indicates '20/20 questions answered'. Below this is a 'Tips' box with an orange border containing two lines of text: 'Not all questions will apply to all research projects. Researchers are encouraged to answer the questions relevant to their work.' and 'Researchers should revisit the tool throughout their research to review or complete their responses.' Below the tips box is a navigation bar with four tabs: 'Plan details', 'Portage Data Management Questions' (which is selected), 'Share', and 'Export'. Underneath the navigation bar is a table listing seven sections of the plan, each with a plus sign icon on the right.

Plan details	Portage Data Management Questions	Share	Export
Data Collection	(3 questions, 3 answered)		+
Documentation and Metadata	(3 questions, 3 answered)		+
Storage and Backup	(3 questions, 3 answered)		+
Preservation	(2 questions, 2 answered)		+
Sharing and Reuse	(3 questions, 3 answered)		+
Responsibilities and Resources	(3 questions, 3 answered)		+
Ethics and Legal Compliance	(3 questions, 3 answered)		+

**Figure 3.** Data Management Plan Sections

Once completed, DMPs are exportable in a range of formats. When exporting to PDF, users may adjust font type and size, as well as margins, according to preference. Before exporting, users can select which sections, questions, and administrative details will be included. The exported DMP has a blank background, meaning that if a letterhead or logo will be added, the plan must be exported in an editable format.

My experience with the DMP Assistant, which has been echoed by some faculty members that have started to use it, is that it is fairly intuitive. I appreciate that plans are divided into manageable sections, allowing users to write one part of the plan at a time rather than requiring them to complete the plan in one sitting. Walking through the questions with other investigators or collaborators often sparks conversations about important steps that have not been addressed. The length of time it takes to write a plan depends on how many decisions regarding storage, permissions, and preservation, among other considerations, have already been made.

One drawback at this stage is that Portage does not currently offer online tutorials for the DMP Assistant. Training varies depending on what partner institutions offer. Once an institution is registered with Portage, it becomes the main contact for its researchers, meaning that when researchers want help or training, they are referred back to contacts at their own institution. This may lead to problems for researchers unaffiliated with an institution. However, other DMP tools provide walkthroughs that include screenshots of the process.<sup>1</sup> Portage does offer broader resources on general data management practices as well as opportunities for training assistance.<sup>2</sup>

It is recommended that researchers develop their DMP at the beginning of the research process (Barsky et al., 2014). Once a plan has been created it can be reviewed, adapted, and shared as needed. It is generally easier to plan ahead rather than scramble to meet grant or policy RDM requirements retrospectively. At the University of Lethbridge, we have been using the DMP Assistant in a workshop on RDM we offer in the months leading up to grant deadlines to encourage best practices. Our experience so far is that our researchers appreciate guidance in this regard and have found the DMP Assistant to be a quick and simple way to begin data management planning. One resource that users have asked for that is not currently available from Portage is sample DMPs. Consequently, we distribute sample DMPs obtained from DMPTool in our workshops. Support in the research process is a valuable service libraries can offer, and understanding tools such as the DMP Assistant provides a simple and effective way to engage researchers in part of that process.

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<sup>1</sup> DMPonline has a short, useful screencast available (<https://dmponline.dcc.ac.uk/>).

<sup>2</sup> An External Training Resource Library can be found here: <https://portagenetwork.ca/training-resources/external-training-resources/resource-library/>.

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## **BIOGRAPHY**

Emma Black is the Science Liaison Librarian at the University of Lethbridge, Alberta. As a member of the Centre for the Study of Scholarly Communication, Emma works to promote awareness of scholarly communication issues among faculty and students.