

From Jamie Wittenberg to Everyone: (09:06 AM)

Is there an official press release for the new tool? I'd like to link to it in an email to our librarians

- Yes – a post announcing the successful migration will be available on the DMPTool blog

From Eric Johnson to Everyone: (09:15 AM)

Sign in Option 2 and 3 seem very similar, possibly confusing

- We're still doing usability testing and open to suggestions about how to refine sign-in options. Most users have Shib-enabled institutional accounts at present. But we also plan to add ORCID login and possibly other routes. Expect the sign in options and Get Started page to be refined over the near-term as we collect more feedback.

From Chris Eaker to Everyone: (09:15 AM)

Is there a way to get a direct link for our users so they don't have to select the institution every time? We are set up with Shib.

From Sherry to Everyone: (09:25 AM)

In log in option 1 - Click full list then you will see the direct link. Chris here is UTK:

<https://dmptool-stg.cdlib.org/orgs/shibboleth/91>

From Sherry to Everyone: (09:48 AM)

Yes!!!!

I figured it out for the pull-down

For Shib.

From MNO (Iowa State) to Everyone: (09:48 AM)

Oooo please share later @Sherry

From MNO (Iowa State) to Everyone: (09:17 AM)

\*also are there any other authentication options other than Shibboleth?

(hooray for metadata)

From Jamie Wittenberg to Everyone: (09:22 AM)

+1 for Chris' question

From Meg Eastwood to Everyone: (09:23 AM)

another +1 for Chris' question

- See question above regarding ORCID login. Please let us know what other options you would like to have.

From MNO (Iowa State) to Everyone: (09:24 AM)

oh wow, is there a way to make the plan guidance selection a search box as well?

- That was part of the original wireframe for guidance selection. It requires some more thought and engineering to implement, but definitely a near term enhancement. We have also considered moving the guidance selection options to the Plan Overview tab. The tabbed plan writing process should be more of a step-wise workflow so a user can click through easily, write their plan, download, etc...

**From MNO (Iowa State) to Everyone: (09:26 AM)**

will customizable advice appear in another tab?

- Customizations added to funder templates (text or example answers) will appear just below the text editor for the appropriate question. Guidance by themes created in the guidance menu appears in the right-hand panel next to each question as a user is writing their plan.

**From Dave Fearon to Everyone: (09:26 AM)**

Can someone else import a DMP to a PI's account on their behalf? (e.g. research staff writes it for PI, or library data services converts a word document and uploads it for PI)

- The way to achieve this is to share the plan, i.e., make the PI a co-owner. Owners and co-owners have equal permissions for plans.

**From Shannon Rauch (BCO-DMO) to Everyone: (09:28 AM)**

There was previously a place for an "Example response" in the template guidance. Does that still exist?

- Yes. You can add "example responses" or "default responses" to an organizational template or to funder templates (in the Customizable templates tab). This will appear just below the text editor for the appropriate question.

**From MNO (Iowa State) to Everyone: (09:28 AM)**

Thank goodness! I'm glad I don't have to customize 20+ themes anymore

- [In response to themed guidance]

**From Shannon Rauch (BCO-DMO) to Everyone: (09:29 AM)**

Does that grid icon in the text editor allow for the creation of a table?

- Yes, the text editor contains a table widget for adding tables to plans. The new text editor (Substance) to be implemented in the near future will also support tables and allow admins to anchor comments in the question text.

**From Brian Westra to Everyone: (09:30 AM)**

Can administrators 'unshare' a shared plan for their institution?

- Not currently, no, unless they are a plan co-owner. We are exploring ideas for improving the Public plans list – allowing people to upvote exemplary sample

plans or provide comments on them to help the good ones rise to the top.

From Chris Eaker to Everyone: (09:31 AM)

It would be nice to require feedback if the user chooses to make their plan public.

From MNO (Iowa State) to Everyone: (09:31 AM)

+1 to Chris

or at least comments

From Brian Westra to Everyone: (09:32 AM)

@Chris - that's what I was thinking. If it's not optimal, but shared, others may assume it's a good pattern to follow.

From UW-Madison Ebling Library to Everyone: (09:32 AM)

+1 to Chris as well

From Yasmeen to Everyone: (09:32 AM)

That's a nice idea, Chris. Would the feedback comments be public as well, or would the plan just go public once the review is acknowledged?

From MNO (Iowa State) to Everyone: (09:33 AM)

I'd like to share plans without people names but with mark up - It sounds like that may be possible now with some tweaking.

From Sarah Jones to Everyone: (09:33 AM)

Would you want feedback on those shared organisationally as well or just public?

Example answers are still available Shannon. They appear above/below the answer box (can't recall which!)

From Chris Eaker to Everyone: (09:34 AM)

Not sure, Yasmeen. Of course, the user isn't required to revise based on comments, so who knows how that would work.

I think both, Sarah. I've seen some terrible ones on both groups.

Congratulations, Sherry!

From MNO (Iowa State) to Everyone: (09:39 AM)

Will we lose all of the usage info from version 2 tomorrow?

From Perry Willett to Everyone: (09:40 AM)

We're migrating the database, so all stats should carry over after the migration

From MNO (Iowa State) to Everyone: (09:41 AM)

Perfect. Thank you Perry

From MNO (Iowa State) to Everyone: (09:46 AM)

will plans in V2 also be migrated?

From Perry Willett to Everyone: (09:47 AM)

Yes, all current plans will be migrated

From MNO (Iowa State) to Everyone: (09:47 AM)

Thanks

From Jamie Wittenberg to Everyone: (09:40 AM)

Can we turn on email notifications for usage stats?

- There's no email notification for usage stats. But all admins will have access to the usage dashboard and can log in to view or download stats at any time. This area is still under construction so please let us know what additional info you would like to have. We will soon add plans/template, e.g. All usage info for your organization will be available since the beginning of DMPTool time (2011 or whenever you first joined).

**From Megan to Everyone: (09:55 AM)**

Can someone's responses be imported into another plan format? (i.e. they complete plan 1 and can transfer their answers to plan 2 and then have access to both plan 1 and plan 2)

- The way to transfer/update a plan is to “Make a copy” of that plan from the Actions menu on My dashboard. Then you will be able to edit the answers and create a new/updated version.

**From Bill Corey to Everyone: (09:57 AM)**

Are there any recovery options if someone deletes a plan? What if a PI shares with a colleague, and the colleague leaves the institution, and deletes the plan.

Plans are 'removed' rather than deleted Bill so they are taken off that user's view

- Users can “Remove” a plan from the main list on their dashboard by selecting this option from the Actions menu. There is an “Are you sure...” message to confirm removing the plan. But the plan will not be deleted from the database so we can recover them if necessary. And in the case of co-ownership, if User A removes a plan from his/her list, User B will still see the plan in their list.