Project Overview and Plan Walkthrough
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**HEIs**

- University of Hull
- University of St Andrews
- University of Glasgow
- *Oxford Brookes University*
- University of Edinburgh
- University of Oxford
- University of Southampton
- University of Leeds
- *University of Lincoln*

**Data Centres**

- Archaeology Data Centre
- ISIS/ICAT - STFC
- UK Data Archive
- *Visual Arts Data Centre*
- NERC

**“In the loop”**

- University of East London
- Bournemouth University
- Imperial College
- Cambridge Crystallographic Data Centre
- Energy Data Centre
Project Overview and Plan Walkthrough

» Phase 1 – Digital Curation Centre (DCC) piloted an approach to a registry service aggregating metadata for research data held within UK universities and national, discipline specific data centres

» Phase 2 – will build on this pilot work with the aim to lay the firm foundations for a UK Research Data Discovery service that enables the discovery of UK research data and meets Jisc’s customer requirements. Includes a service operation plan and business case for its delivery into the future.

» Project page – http://jisc.ac.uk/rd/projects/uk-research-data-discovery
» Project blog – http://rdds.jiscinvolve.org/wp/
» #jiscRDDS
Aims and Objectives

» Develop and agree sector requirements for a UK Research Data Discovery Service.

» Develop key use cases, both for human and system interfaces, for the use of the discovery service. These will be developed through the lifetime of the project to test and guide its scope, architecture and functional needs.

» Ensure development is steered by the UK research data community through the project’s governance structure.

» Evaluate the ANDS and CKAN software as a potential solution to developing a research data discovery service. This will include the investigation of other potential alternative solutions.

» Collaborate closely with the HEIs and Data Centres from phase 1, where they are willing to participate, to ensure their metadata is harvested and successfully imported into the registry through an easy-to-use interface.
Aims and Objectives

» Identify and finalise the agreement on the metadata standard/profile that is appropriate for a successful cross disciplinary service.

» Identify the architecture that a UK service could operate on and develop a functioning service instance, including the opportunity for institutions to have a localised view into the registry.

» Ingest metadata into a functioning service instance for all participating Data Centres and HEIs.

» Develop the business case for a UK Research Data Discovery Service including evidence based market research and cost-benefit analysis.

» Establish and run stakeholder groups to engage with the community to understand their needs and to help to build an effective solution.
Aims and Objectives

- Evaluate the role of this service as providing institutional infrastructure for data discovery and how it works with universities.
- Ensure the service and user interface has undergone comprehensive usability tests.
- Produce toolkits, guidance and advice, as appropriate, on implementation.
- Clear articulation of where the UK Research Data Discovery Service sits within other elements of research data infrastructure.
It is planned that an agile approach will be used for the overall management of the project and potential service development. Characteristics of this approach will be:

- The use of user stories to define requirements
- An iterative approach to the development of the service
- The production of an indicative release and testing schedule
- Management by sprints - these may be variable in length
Work packages

» WP1 – Project Management
» WP2 – Engagement
» WP3 – Requirements Gathering
» WP4 – Software Evaluation
» WP5 – Metadata Development
» WP6 – Data Centre Pilots Implementation
» WP7 – HEIs Pilots Implementation
» WP8 – Service Definition and Design
» WP9 – Dissemination
» WP10 – Institutional Implementation
Managing the project (led by Jisc) through its entire lifetime to ensure successful delivery of outputs, managing project partners, engaging with and reporting to Advisory Groups and coordinating the work packages within the project plan.

Deliverables

- Project Plan
- Grant letters
- Final Report
Engagement with advisory groups/HEIs/DCs throughout the project via groups, mailing lists, virtual and face-to-face meetings, etc. Includes face-to-face meetings of the Advisory Groups and project participants to discuss progress, outputs, technical evaluation and recommendations. Specific topics for discussion depend on timing of the workshop.

Deliverables

- Workshop reports
- Blog posts
Gathering user requirements from the HEIs, data centres and wider sector, defining the criteria for evaluating potential solutions. Include researcher requirements, research managers, etc. Requirements should include those for the software and the crosswalks. Define the evaluation criteria for evaluating potential solutions. Develop key use cases for the use of the registry.

Deliverables
- HEIs Requirements Report
- Data Centres Requirements Report
- Sector Requirements Report
- Evaluation criteria
- Use Cases (ongoing but initial set need to be articulated by July 2015)
Evaluation of CKAN, further evaluation of ANDS and any other solution proposed from the requirements gathering. It is important to ensure each potential solution is evaluated against the same criteria to ensure a robust decision can be made as to which one is taken forward as a solution. It is inevitable that development work will be undertaken within this evaluation and a prototype approach should be taken. In order to respond to evolving user requirements and metadata developments, the evaluation should take an agile, iterative approach to development.

Deliverables
- ANDS Software Installation
- CKAN Software Installation
- Other (TBD) Software Installation
- Evaluation Report (on ANDS, CKAN, other (TBD))
WP5 – Metadata Development

The adoption of a metadata standard for use with phase 1 of the pilot was determined by the selection of ANDS ORCA software. This phase will either continue RIF-CS standard adoption or work on adopting an alternative based on the choice of solution. The decision should be determined by the data providers. The work items depend on the selection from WP4.

Deliverables

- Report summarising agreement around technical processes (metadata, exchange format, crosswalks etc).
WP6 – Data Centre Pilots Implementation

» Engagement of Data Centres to participate in the pilot project (phase 2), develop crosswalks for metadata ingest and contribute their metadata to the discovery service. Includes those Data Centres that contributed to Phase 1 and those identified in the final report willing to be involved in phase 2.

» Deliverables
  › Data Centre Pilots Implementation Report
  › Data Centre Pilots Metadata stores and records
» Engagement of HEIs to participate in the pilot project (phase 2), develop crosswalks for metadata ingest and contribute their metadata to the discovery service. Includes those HEIs that contributed to Phase 1 and those identified in the final report willing to be involved in Phase 2.

» Deliverables
  › HEI Pilots Implementation Report
  › HEI Pilots Metadata stores and records
To take the selected solution deploy as a test service. Develop a business case and operational design presenting options and costs for running a sustainable service, including evidence based market research and cost-benefit analysis. This WP will need to be revised following requirements gathering and evaluation phases.

Deliverables

- Business Case presenting options and costs for running a sustainable Discovery Service, including evidence based market research and cost-benefit analysis.
- Software implementation of working service ready for deployment.
WPg – Dissemination

» Disseminate outputs to the community via blog posts, websites, community engagement, presentations, events, etc. Communicate progress, promote the project nationally and internationally and prepare the community for the new service.

» Deliverables
  › Dissemination outputs
It is feasible that for some universities a discovery service will be able to fulfil their requirement for a local research data registry/catalogue. In addition to the sustainable service implemented in WP8, this work package will design, develop and test such an additional service with a localised view to their data in the registry.

Deliverables
- Call for proposal
- HEIs (Institutional Implementation) Requirements Report
- Sector (Institutional Implementation) Requirements Report
- Use cases (Institutional Implementation)
- Localised institutional implementation/deployment
- Institutional Implementation Report
Governance Structure

» Oversight Group
  › Representatives from Jisc and partner organisations to lead the direction of the project.

» User Group
  › Not researchers but people sharing catalogues and submitting data.

» Technical & Metadata Advisory Group
  › Looking at the service from a technical standpoint. Scope includes consideration of issues such as handling duplicates, deletions, choice of crosswalks for support, QA of crosswalks, transport mechanisms (e.g. OAI-PMH), and other relevant issues. Comprised of developers and architects within the project, plus developers from ANDS and CKAN and relevant technical experts in participating data centres and HEIs.
  › Advising on the development of the metadata schema, including the necessary and desirable metadata elements to achieve discovery functionality and which conventions should be adopted when using these and other relevant issues. Comprised of metadata experts from within the project and relevant metadata experts in participating data centres and HEIs.

» User Group – researchers
  › As the overall aim of the project is production of a service to provide improved discoverability of research data for reuse in research, it is critical that we provide a mechanism for researchers to interact with and feedback on the development of the service. This may be achieved by representative bodies and / or nomination of researchers by project partner institutions.
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