

PRESOFT projet: Research Software Management Plan template (PRESOFT project)

1. Metadata

Software name - *If you need to choose a name, avoid the name of a brand and other software names*

Short description of the software - *A short sentence describing your software*

Software web page or website

Link to source code or package

Contact *(email adress)*

Research unit in charge of the software

Main developers and their affiliations

Software version

Exemple de réponse:

version 1

Date of the software version

Licence

Scientific discipline - *For example according to the ERC*

https://erc.europa.eu/sites/default/files/document/file/ERC_Panel_structure_2018.pdf or to the EGI scientific classification:

https://wiki.egi.eu/wiki/Scientific_Disciplines

Main functionalities - *In the form of keywords*

Main technical characteristics - *In the form of keywords*

Other keywords

2.1 Software context: History

Preparatory material - *Identify and date the preparatory material*

Specifications (if any), conception model (UML or other), use cases... - *References and dates for the specifications, conception model...*

Previous software versions - *Identify and date the previous versions*

Components included in the software and external dependencies - *Identify and describe the different components that are part of the software: name, version, date, authors, website, licence...*

New components to be included in the new version of the software - *Identify and describe the different components*

Roadmap *(Link)*

Are there other software developments with similar functionalities? Which are the differences?

Publications, data and other associated productions - *For example: the team publications to explain the software design or to show the obtained scientific results by using the software*

Up to this date (to be given), estimation of the software's cost - *Number of person/months for example*

2.2 Software context: Project(s) related to the software

Project(s) related to the software

2.3 Software context: Legal issues and distribution policy

Intellectual property - *Identify authors, rightholders.*

In the framework of a project the intellectual property is part of the consortium agreement.

Rightholders or copyright statement

Distribution policy - *Constraints linked to the project (s), the partners and their organisms*

Licence(s) - *Beware of possible heritage and licence compatibility issues. Mention the licences of the documentation, of the web site...*

If the code is to be open, when will it be open? - *To be validated with the possible partners and according to the constraints linked to the funding*

Management of the intellectual property of external contributions - *Rights' transfer agreement to be planned*

Non disclosure or privacy clauses and sensitive data processing (if needed)

3.1 Software features: Scientific goals

Objectives, expected results - *Describe in a synthetic way the scientific goals and the expected results linked to the software*

3.2 Software features: Usage and distribution objectives

Planned or considered lifespan

Planned usage - *What for (publications, teaching, production level usage, industry level usage)?*

Target public - *For example: researchers, team, restricted distribution, collaboration, wide distribution...*

Planned user support - *Type of support, tools, resources, quality of service for the users. For example, user support, ticket system, a person in "best effort"...*

Distribution goals - *The software is "for internal use only", the software will be published via an article, the software will be distributed widely...*

Collaboration community wished - *If yes, which one?*

- Don't know
- Yes
- No

Exemple de réponse:

For example in the target scientific community.

Adequacy of the resources (development, maintenance...) to the distribution goals - *Are the available resources suitable? (human, financial and material resources)*

Risk analysis - *A risk analysis may be useful before launching an expensive development or an unwise distribution*

Software preservation - *What is the objective for the preservation and what is the solution used? - Please distinguish short term backup and long term archiving*

3.3 Software features: Technical features

Used technologies

Dependencies - *OS, SDK, libraries, browser, external APIs...*

Already existing components reuse - *Technical constraints*

Documentation - *Give the documentation's url*

Used norms and standards - *Example: ISO norm of the development language*

4. Team organisation

Governance - *For example the organisation officially in charge of the software, a consortium...*

Consortium agreement including governance, development and future of the software - *In the case of a shared development between several organisms - If the software is developed in the framework of a project, the consortium agreement must take it into account.*

Team - *List the members of the team. Indicate for each person its status (employee /institution, internship, student, retired...) and their participation dates*

Organisation around the software - *Responsibilities of the different actors: development, training, support, distribution, translation... - Distinguish the different roles: leader, main developers, minor contributors, scientific contributors (no code writing), documentation writers...*

Costs and funding distribution

Type of development - *Collaborative or not (practical organisation of the collaboration). Note that the 5th section details the development organisation*

Actions to be planned in case of a person's leave

5. Development organisation

Development team - *On one or several sites, depending on one or several institutions...*

Development plan - *Roadmap including the new versions, functionalities planned and dates.*

Development methods, used standards, tools and infrastructures (code repository) - *Example: tools for version management and collaborative development*

Actor's responsibilities in the development

Quality procedures - *For example, actions taken to foster the software maintainability, best practices applied, verification tests...*

Security (taken into account in the development)

Version delivery, bugs, tests and validation management - *Are there testing or other validation procedures? With which follow-up? Are they to be given to final users? How do you manage bugs?*

Documentation production management (internal and for users, installation and requirements, use examples) - *Explain how the documentation is produced and updated for each version (responsibilities, organisation...)*

Describe main planned evolutions - *For example: integration in other projects, software translations...*

If external participations are expected and possible, which are the rules (validation of the contributions, contribution integration in the major versions, participation integration)? - *It is advisable to define accurately the rules before any external participation.*

6. Distribution organisation

Reference repository - *For example: the link to the software version on SourceSup, Zenodo or Gitlab IN2P3*

Persistent identifier - *Indicate for example the DOI of your software*

Citation form - *You can suggest to cite the publication that describes your software or the one that seems to be the most important. Otherwise you may propose for example: "author(s), software name, short description, version, date, url"*

Links to articles or other research outputs external to the team and that use the software - *Important: to show that the software is used outside the development team or the original laboratories.*

Referencing (announces, websites of the scientific community...)

Communications - *Conferences, posters, flyers...*

Publications in a software journal

User support (such as offered to the users)

Usage indicators - *Number of downloads, number of exchanges with users...*

7. SMP management

Person in charge of this SMP

Is the SMP required by a project funding, an agreement, contract or other?

Organisation to write and update the SMP and monitor actions and goals - *Is there a collaborative place for this SMP? Is it a text document? What is the update frequency or it is updated continuously? What type of events triggers an update? Who are the actors?*

The current document has been created with the DMP OPIDoR service. Please don't forget to keep the successive versions in your local workspace.

Distribution of this SMP

- Confidential
- Don't know
- Public
- Restricted

Links with the current project's Data Management Plan (if any) - *If yes, is there a reference model or important points to develop? Is this SMP a part of the project's DMP? - In certain calls, the DMP template includes a section for software, but a DMP is focused on data, not on software and it is not designed for software management.*