

DMPonline Tool User Guide

Guide for researchers

This document gives step-by-step instructions on using the DMPonline Tool developed by the Digital Curation Centre (DCC). A quick reference guide is available in the Appendix.

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This document was produced as part of the Service Orientated Toolkit for Research Data Management project funded by JISC and based at the University of Hertfordshire.

The contents of this guide for the *DMPonline* tool developed by the DCC is based on the *DMPonline* how to guide compiled by DCC, and expanded to include specific instructions from the University of Hertfordshire for using the University's DMP template.

Introduction

Funding bodies increasingly require their grant holders to produce and maintain Data Management Plans (DMPs), both at the bid preparation stage and after funding has been secured. *DMPonline* has been developed by the Digital Curation Centre to enable researchers to build and edit DMPs according to the requirements stipulated by the major UK funders.

The tool has three main functions:

1. To help create and maintain different versions of Data Management Plans.
2. To provide useful guidance on data management issues and how to meet research funders' requirements.
3. To export attractive and useful plans in a variety of formats.

This guide will lead you through the process from setting up an account to the export of a finished data management plan.

Access DMPonline

DMPonline is accessible at

<http://dmponline.dcc.ac.uk/>

Before you can start filing in your DMP, you need to register.

Glossary

DMP: Data Management Plan

RCUK: The collective name for the government funded Research Councils in the UK

RDM: Research Data Management

Sign in to DMPonline

The Sign in and Sign up links are on the right-hand side of the welcome page. Once you have created an account, you can connect to the University of Hertfordshire and log in with your University credentials using Athens.

Create an Account

To create an account click on **'Sign Up'** and fill in the short form consisting of your name, organisation, and create a password. The T&Cs are in agreement with the University of Hertfordshire's data policy.

The screenshot shows the DMPonline website interface. At the top left is the 'DMP ONLINE' logo. To the right are navigation buttons for 'Home', 'About', 'News', and 'Help'. The main content area is split into two columns. The left column contains a 'Welcome.' message, a link to the 'Digital Curation Centre' for writing data management plans, and a link to 'Create an account to start your first plan.'. The right column features a 'Sign in' section with a plus icon and a 'Sign up' section with a minus icon. The 'Sign up' form includes fields for 'Email *', 'Organisation' (a dropdown menu), 'Password *', and 'Password confirmation *'. Below these fields is a checkbox for 'I accept the terms and conditions *' and a 'Sign up' button. At the bottom of the page, there are links for 'Contact us' and 'Terms of use', a copyright notice for '© 2004 - 2013 Digital Curation Centre (DCC)', and logos for 'DCC' and 'Jisc'.

Highlights of the Terms and Conditions:

They will not sell, rent or trade any personal information you provide to us. Emails will be stored and used to contact you regarding updates.

The University of Edinburgh holds your plans on your behalf, but they are your property and responsibility. Any FOI applicants will be referred back to your home institution.

Your password is stored in encrypted form and cannot be retrieved. If forgotten it has to be reset.

Sign up

New to DMPonline? Sign up today.

I accept the terms and conditions *

A message with a confirmation link has been sent to your email address. Please open the link to activate your account.

Once you have activated your account using the link emailed to you, you need to complete your personal details. When saved you will then be taken to the welcome page.

Edit profile

Please note that your email address is used as your username. If you change this, remember to use your new email address on sign in.

You can edit any of the details below.

Email *

First name

Last name

Organisation

ORCID number

[Link your DMPonline account to your institutional credentials](#)

If you would like to change your password please complete the following fields.

Current password

New password

Password confirmation

[Contact us](#) | [Terms of use](#)

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Next time you want to use DMPonline, you can sign in using your email and password, or connect your DMPonline account to your University credentials.

The screenshot shows the DMPonline website interface. At the top left is the 'DMP ONLINE' logo. To the right are navigation buttons for 'Home', 'About', 'News', and 'Help'. The main content area is divided into two sections: 'Sign in' and 'Sign up'. The 'Sign in' section includes a 'Welcome.' message, a link to the 'Digital Curation Centre', and a 'Create an account to start your first plan.' link. It features input fields for 'Email address *' and 'Password *', a 'Forgot your password?' link, a 'Remember me' checkbox, and a 'Sign in' button. Below this is a link for 'Or, sign in with your institutional credentials (UK users only)'. The 'Sign up' section has a '+' icon and the text 'New to DMPonline? Sign up today.' At the bottom, there are links for 'Contact us | Terms of use', a copyright notice '© 2004 - 2013 Digital Curation Centre (DCC)', and logos for 'DCC' and 'Jisc'.

University of Hertfordshire

DMP ONLINE

Home About News Help

Welcome.

DMPonline has been developed by the [Digital Curation Centre](#) to help you write data management plans.

[Create an account to start your first plan.](#)

Sign in

Email address *

Password *

[Forgot your password?](#)

Remember me

Sign in

[Or, sign in with your institutional credentials \(UK users only\)](#)

Sign up

New to DMPonline? Sign up today.

Contact us | Terms of use

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DCC Jisc

Connect to the University

You can log in using your Hertfordshire account details and connect using Athens. You need to link your University of Hertfordshire account to an existing DMPonline account.

Select the '**sign in with your institution credentials**' from beneath the **Sign in** button;

DMP Online is a data management planning tool provided by the Digital Curation Centre.

Which organisation would you like to sign in with?

Start typing the name of your organisation (e.g. Anywhere College) in the search box, and options will appear below:

University of H	Search
University of Hertfordshire	Sign In
University of Huddersfield - Athens	
University of Hull (Athens)	
University of Hull (Shibboleth)	

Search over [All Sites](#)

Start typing University of Hertfordshire into the Search bar; the site will provide suggestions for you to select.

Select 'Alternative Login' from the bottom of the box.



Authentication Point

OpenAthens username:

OpenAthens password:

[Forgotten password?](#)

[Alternative login](#) [Login help](#)

A list of institutes with alternative log in portals will be shown. Either scroll down or enter 'hert' to reduce the institutes displayed – select 'University of Hertfordshire'.

Organisation search results

Search again:

hert

Your search returned **18** organisations. The results are ranked by most likely choices first.

[BEDFORDSHIRE; nb NOT Ambulance: see Hertfordshire. For SEPT see Cross-County NHS organisations below](#)
[East and North Hertfordshire NHS Trust](#)
[East of England Ambulance Service \(Beds & Herts\)](#)
[GPs, Practice Staff and CCG staff in Hertfordshire](#)
[Hertfordshire Community NHS Trust](#)
[HERTFORDSHIRE inc. Herts. & Beds. Ambulance](#)
[Hertfordshire Partnership NHS Foundation Trust](#)
[Hospices in Hertfordshire](#)
[Public Health Organisations in Hertfordshire](#)
[University of Hertfordshire](#)
[West Hertfordshire Hospitals NHS Trust](#)
[Bedford Hospital NHS Trust](#)
[Central Eastern CSU](#)
[GPs, Practice Staff and CCG staff in Bedfordshire](#)
[Healthcare Provider Organisations for NHS in Bedfordshire](#)
[Hospices in Bedfordshire](#)
[Luton & Dunstable Hospital NHS Trust](#)
[Public Health organisations in Bedfordshire](#)

Continue to login

[Go to the University of Hertfordshire login page »](#)

Remember this organisation on this computer

For assistance:

Email: Athens-Help@herts.ac.uk
 Phone: 01707 284678

For information on how we use cookies please check our [privacy policy](#).

Select to [Go to the University of Hertfordshire login page >>](#) which will redirect you to StudyNet.

On your own computer or workspace, allow the site to remember your institution so that you do not need to search every time you log in using Athens.

Once you have logged into StudyNet, you will be returned to the DMPonline home page.

You now need to enter your University email address to complete signing up. Your University credentials will be associated with this email. DMPonline will email you confirmation.

Sign up

Email *

Confirm Email *

You are creating a new account linked to your institution credentials



Associate an existing account with your institution credentials instead

Please tell us a little about yourself


Type of user Researcher
 Support staff
 Other

By signing up to use this service you are agreeing to the terms laid out in the Privacy Statement

Sign up


The next time you log in, you only need to select the University of Hertfordshire from the institutional log in page. It will automatically redirect to StudyNet and only ask for log in if your StudyNet session has timed out.

DMPonline

The  Data Management Planning Tool

DMP Online is a data management planning tool provided by the Digital Curation Centre.

Which organisation would you like to sign in with?

Start typing the name of your organisation  (e.g. Anywhere College) in the search box, and options will appear below:

**University of
Hertfordshire**
remove x

[Need help logging in?](#)
or [Let me choose from a list](#)

The UK Access Management Federation

Starting a DMP

When you have logged in you can select to start a new plan, or continue with a saved plan.

The backbone of the DMPonline tool is a checklist of questions that address the key areas to consider when producing a data management strategy.

When you start a plan, **select the template for your funding body.**

My plans

Welcome.

You are now ready to create your first DMP.
Click the 'Create plan' button below to begin.

Create plan

If you do not select a template, the University of Hertfordshire's Template will be used.

The screenshot shows the 'Create a new plan' page of the DMPonline tool. At the top left is the 'DMP ONLINE' logo. On the right, there are navigation buttons: 'View plans', 'Create plan', 'About', 'News', and 'Help'. The main heading is 'Create a new plan'. Below it, a message asks the user to select from drop-downs to determine questions and guidance. There are three sections:

- Research funder:** 'If applying for funding, select your research funder. Otherwise leave blank.' A dropdown menu shows 'Science and Technology Facilities Council' selected. A link for 'Not applicable/not listed' is provided.
- University:** 'To see institutional questions and/or guidance, select your university. You may leave blank or select a different institution to your own.' A dropdown menu shows 'University of Hertfordshire' selected. A link for 'Not applicable/not listed' is provided.
- Guidance sources:** 'Tick to select any other sources of guidance you wish to see.' There is a checkbox for 'Generic guidance from the Digital Curation Centre' which is currently unchecked.

At the bottom of the form is a 'Create plan' button.

If you have already linked your University credentials with your DMPonline account, the University of Hertfordshire's template will be shown – you need to complete this as part of the post award stage of your application.

When you have selected the templates, select **'Create plan'** at the bottom of the page.

Confirm plan details

Where your funder or institution doesn't have specific requirements (or if you left these options blank), you will see the DCC Checklist. This offers a generic set of DMP questions and guidance. For more details see: [DMP checklist 2013](#).

Funder: Science and Technology Facilities Council

Institution: University of Hertfordshire

Template: STFC Template

Other guidance:

Cancel

Yes, create plan

Confirm your templates, and then complete the basic project details. Advice from DCC, the funder, and the University of Hertfordshire will pop up next to the plan detail fields.

My project (STFC Template)

Plan details | STFC Data Management Plan | Share | Export

Please fill in the basic project details below and click 'Update' to save Cancel

Project name	<input type="text" value="My project (STFC Template)"/>
ID	<input type="text"/>
Grant number	<input type="text"/>
Principal Investigator/Researcher	<input type="text" value="Joanna Goodger"/>
Principal Investigator/Researcher ID	<input type="text"/>
Project data contact	<input type="text"/>
Description	<input type="text"/>

Questions to consider:

- What is the nature of your research project?
- What research questions are you addressing?
- For what purpose are the data being collected or created?

Guidance:

Briefly summarise the type of study (or studies) to help others understand the purposes for which the data are being collected or created.

Update Cancel

Beneath the basic details is a summary of the template that you selected. This includes the section names and the questions that you need to answer.

This plan is based on:

Funder	Science and Technology Facilities Council
Institution	University of Hertfordshire

[Answer questions](#)[Export](#)

The STFC advises that any proposals for projects that would result in the production or collection of scientific data should include a data management plan in the case for support.

For more information see the [guidelines on the STFC website](#).

Sections	Questions
Data types	- Specify the types of data the research will generate.
Data preservation	- Specify which data will be preserved and how. - Specify the software and metadata implications. - Specify for how long the data will be preserved.
Data sharing	- Specify and justify which data will have value to others and should be shared. - Specify and justify the length of any proprietary period. - Specify how data will be shared
Resources	- Specify and justify any resources required to preserve and share the data.

Populating a Plan

The questions are grouped into themes that cover the lifecycle of your project. Make sure you have addressed all of them before exporting your plan. Your progress is shown in the top right corner.

Use the + and – on the right-hand side to expand and collapse the sections and advice.

The screenshot displays the 'My project (MRC Template)' interface. At the top, it indicates 'No questions have been answered'. The main navigation bar includes 'Plan details', 'MRC Data Management Plan', 'Share', and 'Export'. The current section is '0. Proposal name (1 question, 0 answered)', which is collapsed. Below it, '1. Description of Data (3 questions, 0 answered)' is expanded. The first question, '1.1 Type of Study', is shown in a rich text editor with a 'Paragraph' format. To the right of the editor are two guidance boxes: 'MRC Guidance' (Up to three lines of text that summarise the type of study (or studies) for which the data are being collected.) and 'UH guidance on Project Description' (Put this plan in context - What do you hope to achieve during this project? What's the big picture?). A 'Save' button and a 'Not answered yet' indicator are visible at the bottom left of the question area.

Fill in your responses under the “Your Input” section. Questions are mapped across funder’s templates to eliminate the re-entry of information.

To the right of the question are boxes of guidance from the template provider and from the University of Hertfordshire. The **University of Hertfordshire advice** includes policy extracts, additional questions to expand upon the DMP question, and web links to the RDM website where more information on University of Hertfordshire’s recommendations, solutions, and generic advice can be found.

Other important issues to consider when completing your DMP:

- Read the description at the top of the DMP form for information specific to your funding body. You may only need to fill out a portion of the DMP during funding but are expected to fill in the full DMP post-award.
- Boilerplate text can be used if there is specific, technical information that should be included in a plan that you may not be qualified to explain, for example, details of backup systems for institutional data stores. In this case, the University of Hertfordshire advice with include the standard description or a link to text on the RDM website.
- The data.bris team have compiled guides for each of the RCUK DMPs plus an AHRC technical plan. These should be used in conjunction with the University of Hertfordshire template to complete your RCUK funding application DMP.

<http://data.bris.ac.uk/research/planning/>

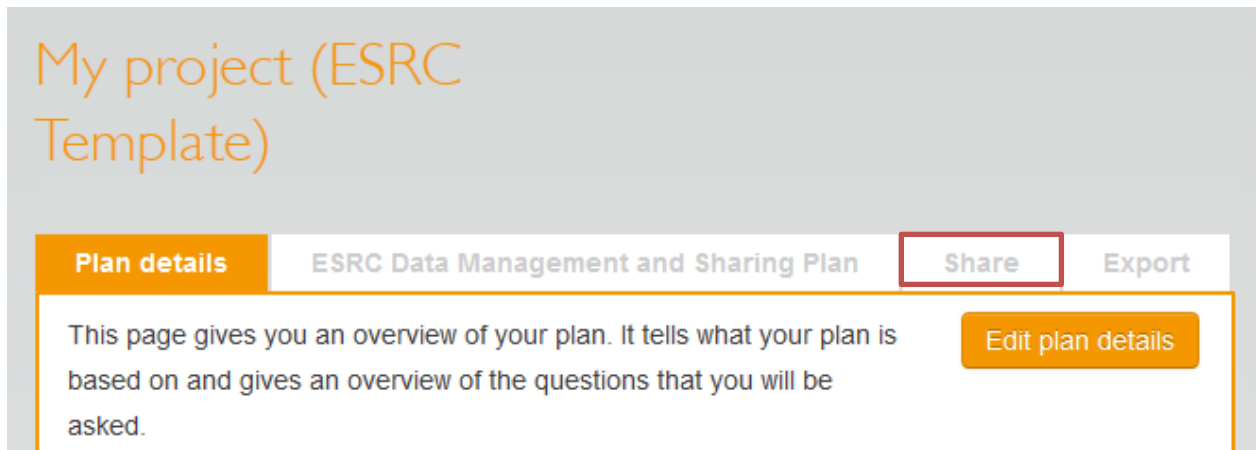
- Example DMPs for common funders from University of Hertfordshire staff are available on the RDM website in the discipline specific sections of the training pages.

Sharing a plan

You can share your plan with your collaborators to gain their input. Whilst there are advantages to giving your collaborators editing rights to your plan, you risk not being able to monitor the changes fully which could lead to conflicts with the University's data policy. However, collaborators may be able to fill in details pertinent to their side of the project directly if given full editing rights.

After completion you may wish to allow IT services to have access to a read only copy of the plan. An exemplary plan could be shared with anyone attached to your host institution or even with the wider HE community.

Select the **'Share'** tab on your project plan page:



You can give other people access to your plan here. There are three permission levels.

- Users with "read only" access can only read the plan.
- Editors can contribute to the plan.
- Co-owners can also contribute to the plan, but additionally can edit the plan details and control access to the plan.

Add each collaborator in turn by entering their email address below, choosing a permission level and clicking "Add collaborator".

Those you invite will receive an email notification that they have access to this plan, inviting them to register with DMPonline if they don't already have an account. A notification is also issued when a user's permission level is changed.

Collaborators

Email address	Permissions	
A User	Owner	

Add collaborator

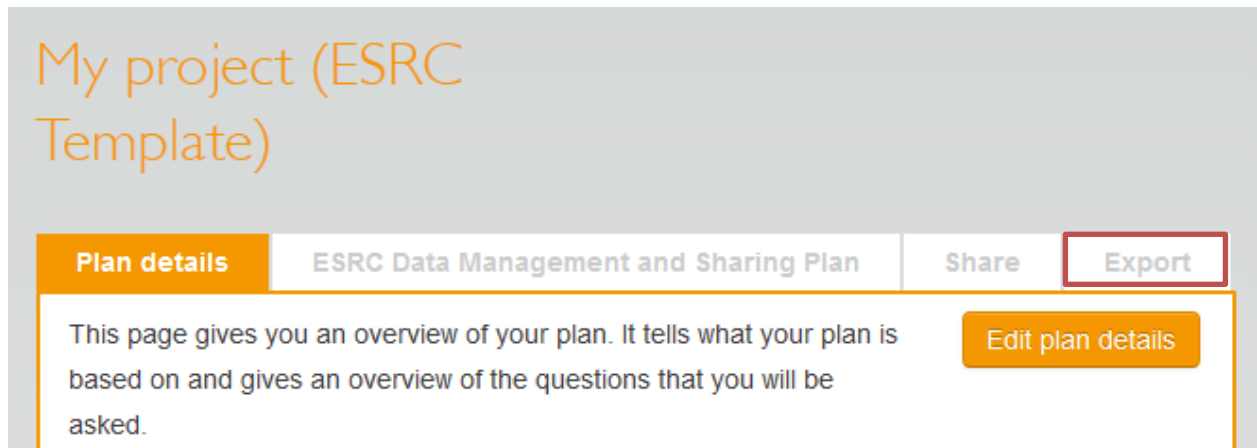
Permissions:

 ▼

The other recipients will need to register to see the DMP, but they can do this once they have been invited to view your DMP.

Export your plan

Select the **'Export'** tab to begin processing your question responses.



The screenshot shows a web interface for a project titled "My project (ESRC Template)". At the top, there are four tabs: "Plan details", "ESRC Data Management and Sharing Plan", "Share", and "Export". The "Export" tab is highlighted with a red border. Below the tabs, there is a text area that reads: "This page gives you an overview of your plan. It tells what your plan is based on and gives an overview of the questions that you will be asked." To the right of this text is an orange button labeled "Edit plan details".

From here you can download your plan in various formats. This may be useful if you need to submit your plan as part of a grant application.

Select what format you wish to use and click to 'Export'. You can;

- View as a web page (Best for getting an overview of your plan)
- View as plain text (Best for copying and pasting)
- View as PDF (Best for sharing e.g. by email):

Also, you can export it with admin details (Grant Number, Identifier, Principal Investigator, Project Description etc.) or without admin details.

The completed University Template should be exported in pdf format and emailed to dmp@herts.ac.uk post-award where it will be stored for future reference.

A Reference Guide to the DMPonline Tool: Important Features

Export your plan ready for submission to your funding body as part of the application or post-award process, and to the University of Hertfordshire post-award.

Select one of your DMP templates or all of the questions.

Share your plans with collaborators for joint input.

Share with your institute members or with the global community as an exemplar.

My project (ESRC Template)

Plan details

ESRC Data Management and Sharing Plan

Share

Export

This page gives you an overview of ... tells what your plan is based on and gives an overview of the ... ons that you will be asked.

Edit plan details

Complete the questions require of your funding body or the University of Hertfordshire.

Advice from both the University and the funding body are displayed to the right of the questions.