DM Ponline Tool User Guide

Guide for researchers

This document gives step-by-step instructions on using the DM Ponline 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.

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.
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.
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.
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;

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.
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’.

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.
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.
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.

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

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 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.

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.
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.

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<tr>
<th>Sections</th>
<th>Questions</th>
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<tbody>
<tr>
<td>Data types</td>
<td>- Specify the types of data the research will generate.</td>
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<tr>
<td>Data preservation</td>
<td>- Specify which data will be preserved and how.</td>
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<tr>
<td>Data sharing</td>
<td>- Specify the software and metadata implications.</td>
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<td></td>
<td>- Specify for how long the data will be preserved.</td>
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<tr>
<td>Resources</td>
<td>- Specify and justify any resources required to preserve and share the data.</td>
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</tbody>
</table>
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.

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 complied 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/](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 be 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

<table>
<thead>
<tr>
<th>Email address</th>
<th>Permissions</th>
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<tbody>
<tr>
<td>A User</td>
<td>Owner</td>
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</tbody>
</table>

Add collaborator

- **Email**: 
- **Permissions**: Read only

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.

My project (ESRC Template)

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.

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.

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.