



# DMPonline: intro and demo

Sarah Jones

Digital Curation Centre, Glasgow

[sarah.jones@glasgow.ac.uk](mailto:sarah.jones@glasgow.ac.uk)

Twitter: @sjDCC



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Funded by:





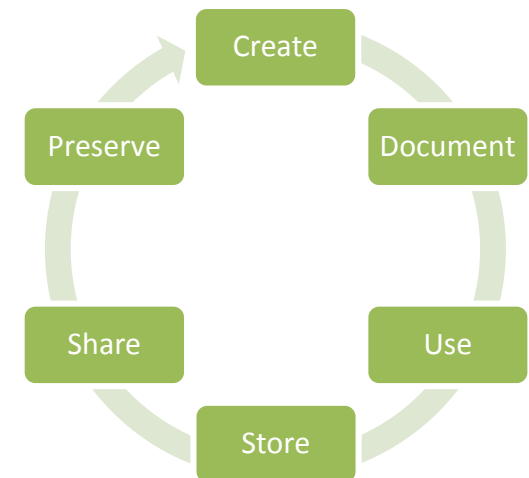
# Data Management Plans and DMPonline

Why is the tool needed and what does it do?

# What is a Data Management Plan?

A short plan that outlines:

- what data will be created and how
- how it will be managed (storage, back-up, access...)
- plans for data sharing and preservation



# Why develop a DMP?

DMPs are often submitted with grant applications, but are useful whenever researchers are creating data.

They can help people to:

- Make informed decisions to anticipate and avoid problems
- Avoid duplication, data loss and security breaches
- Develop procedures early on for consistency
- Ensure data are accurate, complete, reliable and secure
- Save time and effort to make research easier!

# What is DMPonline?

A web-based tool to help researchers write data management plans

## A short history

- Launched in April 2010 at the Jisc conference
- Released v.2 in March 2011 with extra functionality
- Released v.3 in April 2012 with revisions in light of the DMPTool and work from the Jisc MRD programme
- Released v.4 in December 2013, incorporating major changes from evaluation
- Bi-monthly release schedule now to add features

# Main features in DMPonline

- Templates for different requirements (funder or institution)
- Tailored guidance (funder, institutional, discipline-specific etc)
- Ability to provide examples and suggested answers
- Supports multiple phases (e.g. pre- / during / post-project)
- Granular read / write / share permissions
- Customised exports to a variety of formats
- Shibboleth authentication for single sign-on

# How the tool works

## Create a new plan

Please select from the following drop-downs so we can determine what questions and guidance should be displayed in your plan.

If you aren't responding to specific requirements from a funder or an institution, [select here to write a generic DMP](#) based on the most common themes.

If applying for funding, select your research funder.

Otherwise leave blank.

Economic and Social Research Council

[Not applicable/not listed.](#)

To see institutional questions and/or guidance, select your organisation.

You may leave blank or select a different organisation to your own.

University of Glasgow

[Not applicable/not listed.](#)

Tick to select any other sources of guidance you wish to see.

☐ DCC guidance

Create plan

Click to write a generic DMP

Or choose your funder to get their specific template

Pick your uni to add local guidance and to get the uni template if there isn't a funder one

Choose any additional optional guidance

# Answering questions

My project (DCC Template)

1/13

Plan details

Generic DMP

Share

Export

Data Collection (2 questions, 0 answered)

+

Documentation and Metadata (1 question, 1 answered)

-

What documentation and metadata will accompany the data?

B I Paragraph

Metadata will be tagged in XML using the Data Documentation Initiative (DDI) format. The codebook will contain information on study design, sampling methodology, fieldwork, variable-level detail, and all information necessary for a secondary analyst to use the data accurately and effectively.

Save

Answered less than a minute ago by Sarah Jones

DCC Guidance

Questions to consider:

What information is needed for the data to be read and interpreted in the future?

How will you capture / create this documentation and metadata?

What metadata standards will you use and why?

Guidance:

Describe the types of documentation that will accompany the data to help secondary users to understand and reuse it. This should at least include basic details that will help people to find the data, including who created or contributed to the data, its title, date of creation and under what conditions it can be accessed.

Documentation may also include details on the methodology used, analytical and procedural information, definitions of variables, vocabularies, units of measurement, any assumptions made, and the format and file type of the data. Consider how you will capture this information and where it will be recorded. Wherever possible you should identify and use existing community standards.

Notes who has answered the question and when

Progress bar updates how many questions remain



# Co-writing DMPs

The screenshot shows the DMP ONLINE web application. At the top left is the logo. At the top right, it says 'Signed in as Laura Molloy'. Below the logo are navigation buttons: 'View plans', 'Create plan', 'About', 'News', and 'Help'. The main heading is 'My project (DCC Template)' with a progress bar showing '1/13'. Below this are tabs for 'Plan details', 'Generic DMP', and 'Export'. The 'Generic DMP' tab is active, showing a list of sections: 'Data Collection', 'Documentation and Metadata', 'Ethics and Legal Compliance', 'Storage and Backup', 'Selection and Preservation', 'Data Sharing', and 'Responsibilities and Resources'. The 'Documentation and Metadata' section is highlighted with a yellow background and a message: 'This section is locked for editing by Sarah Jones.' Below this message is a text area with the question 'What documentation and metadata will accompany the data?' and an answer by Sarah Jones. A green callout box points to the locked section with the text: 'Sections are locked for editing when they're being worked on by colleagues'. At the bottom right is an 'Export' button.

**DMP ONLINE**

Signed in as Laura Molloy

View plans Create plan About News Help

My project (DCC Template) 1/13

Plan details Generic DMP Export

**Data Collection** (2 questions, 0 answered) +

**Documentation and Metadata** (1 question, 1 answered) -

This section is locked for editing by Sarah Jones.

What documentation and metadata will accompany the data?

Metadata will be tagged in XML using the Data Documentation Initiative (DDI) format. The codebook will contain information on study design, sampling methodology, fieldwork, variable-level detail, and all information necessary for a secondary analyst to use the data accurately and effectively.

Answered 7 minutes ago by Sarah Jones

**Ethics and Legal Compliance** (2 questions, 0 answered) +

**Storage and Backup** (2 questions, 0 answered) +

**Selection and Preservation** (2 questions, 0 answered) +

**Data Sharing** (2 questions, 0 answered) +

**Responsibilities and Resources** (2 questions, 0 answered) +

Export

Sections are locked for editing when they're being worked on by colleagues

# Exporting plans

Format

pdf

Export

Settings (Using template PDF formatting values)

## Title

Title

COMET

## Included Elements

### Admin details



Project Name  
Project Identifier  
Grant Title  
Principal Investigator / Researcher  
Project Data Contact  
Description  
Funder  
Institution



### Sections



#### Data management procedures



Data management procedures to be followed during the lifetim...



#### Existing datasets



Existing datasets to be used by the grant or fellowship



#### New datasets



Datasets likely to be created by the grant or fellowship which wi...



## PDF Formatting

### Font

### Margin (mm)

Face

Size (pt)

Top

Bottom

Left

Right

Arial, Helvetica, Sans-Serif

11

20

20

20

20

Save

Reset

Choose what to export, set fonts and pick from a variety of formats: pdf, txt, docx, csv, xml, html, json,



## Customising DMPonline

Tailoring the tool to gather info and present available support

# Overview of customisation options

- Add your own template(s)
- Add questions to other templates
- Add custom guidance
- Add dropdowns options, examples, suggested answers...
- Brand the tool (coming soon)

# Organisations can add DMP template(s)

## My plan (UoE Data Management Plan)

0/10 questions answered

approx. 25% of available space used

Plan details

Default UoE plan

Share

Export

Data Capture (2 questions, 0 answered)



Data Management (2 questions, 0 answered)



How will the data be documented to ensure it can be understood?

Example of answer

Metadata will be tagged in XML using the Data Documentation Initiative (DDI) format. The codebook will contain information on study design, sampling methodology, fieldwork, variable-level detail, and all information necessary for a secondary analyst to use the data accurately and effectively.

From the ICPSR [Framework for Creating a Data Management Plan](#).

**B** *I*

Save

Not answered yet

Guidance

Share note

UoE Guidance

Producing good documentation and metadata provides context for your data, and makes it easier to find and use in the long term. The amount of effort put into documenting your data will depend on the intended lifespan and how broadly you intend to share it.

You may want to capture details about what instrumentation has been used and how that has been calibrated, full variable and value labels, and details about your methodology. Some of this information may be captured already in lab notebooks, project documents or research papers.

More information on [documenting data](#)

# Provide examples and suggested answers

What data is being generated or reused in this research?

Example answer

Historic possum abundance (trap-catch) and possum control effort data will be provided by OSPRI. We will collect possum abundance (trap-catch) and movement (GPS collar) data during the project. Broad habitat/vegetation class information will be extracted from LCDB3.

**B**

*I*

Paragraph



Which data will be shared and how?

Suggested answer

If you are able to make your data openly available and plan to use the [Edinburgh DataShare](#) service, you could say something along the lines of:

The University of Edinburgh undertakes to maintain the digital outputs of this project for the long-term and will utilise University infrastructure (namely the Edinburgh DataShare repository) to ensure continued access. Edinburgh DataShare is an online digital repository of multi-disciplinary research datasets produced at the University of Edinburgh, hosted by the Data Library in Information Services. A persistent identifier and suggested citation is provided for any dataset deposited.

# Dropdown options and default styles

5. Ik ga bestaande data hergebruiken en ik heb toestemming van de data-eigenaar/eigenaren voor het gebruik van zijn/hun data.

- ☐ Ja
- ☐ De toestemming moet ik nog krijgen.
- ☐ Toestemming is niet nodig, omdat de data open beschikbaar zijn.

## New datasets (1 question, 0 answered)

Datasets likely to be created by the grant or fellowship which will be made available to a NERC Environmental Data Centre at the end of the Grant

Data centre	Dataset description	Release data to data centre	Reuse scenarios
<i>The most appropriate NERC Data Centre e.g. BADC, BODC, NGDC...</i>	<i>1-2 sentences describing the data</i>	<i>Noting that data should normally be delivered to a datacentre within 2 years of collection</i>	<i>Possible user types and estimate of numbers if possible</i>

## Nominated Data Centre

- ☐ British Atmospheric Data Centre (BADC)
- ☐ British Geological Survey (BGS)
- ☐ British Oceanographic Data Centre (BODC)
- ☐ Environmental Information Data Centre (EIDC)
- ☐ National Oceanography Centre (NOC)
- ☐ NERC Earth Observation Data Centre (NEODC)
- ☐ Polar Data Centre (PDC)
- ☐ Other e.g. Archaeology Data Service

Comment

# You can have more than one template

## Choose a template

There are a number of possible templates you could use. Please choose one.

Tick to select any other sources of guidance you wish to see.

☐ Generic guidance from the Digital Curation Centre

UEL postgraduate DMP

UEL postgraduate DMP

UEL standard DMP

You may want to provide different templates for different audiences or different funding calls / programmes



# And templates can have multiple phases

Withdrawal of services for young adults

Plan details Initial DMP (within first 6 months) Mid-term Review DMP Final review DMP Share Export

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.

Project name	Withdrawal of services for young adults
ID	-
Grant number	-
Principal Investigator/Researcher	Sarah Jones
Project data contact	-
Description	-

This plan is based on:

Funder	European Commission (Horizon 2020)
Institution	University of Glasgow

This encourages researchers to actively update the Data Management Plan throughout the project

# Earlier versions of templates are retained

## Versions

A first version is created automatically. If you want to make major changes to published versions later (e.g. add section or questions) please create a new version. If you only want to fix typos or make small changes that do not alter meanings, edit the current version.

Title	Published	Created at	Last updated	Actions
Outline for application (Version 1)	false	16-09-2013	24-07-2014	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Preview</a>
Outline for application (version 2)	true	30-05-2014	24-07-2014	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Preview</a>

NERC Template

Back to edit view View all templates

Template details Outline DMP Full DMP Add new phase +

New datasets +

Existing datasets +

Data management procedures +

Data management procedures to be followed during the lifetime of the grant or fellowship

NERC Guidance +

Version 1 Outline DMP now unpublished

NERC Template

Back to edit view View all templates

Template details Outline DMP Full DMP Add new phase +

Outline DMP

As lead PI you are responsible for data from all components of a project.

Note: when completed, this should be no more than one page maximum

Project Title

Save Not answered yet

Principal Investigator(s) / Grant Holder

Save Not answered yet

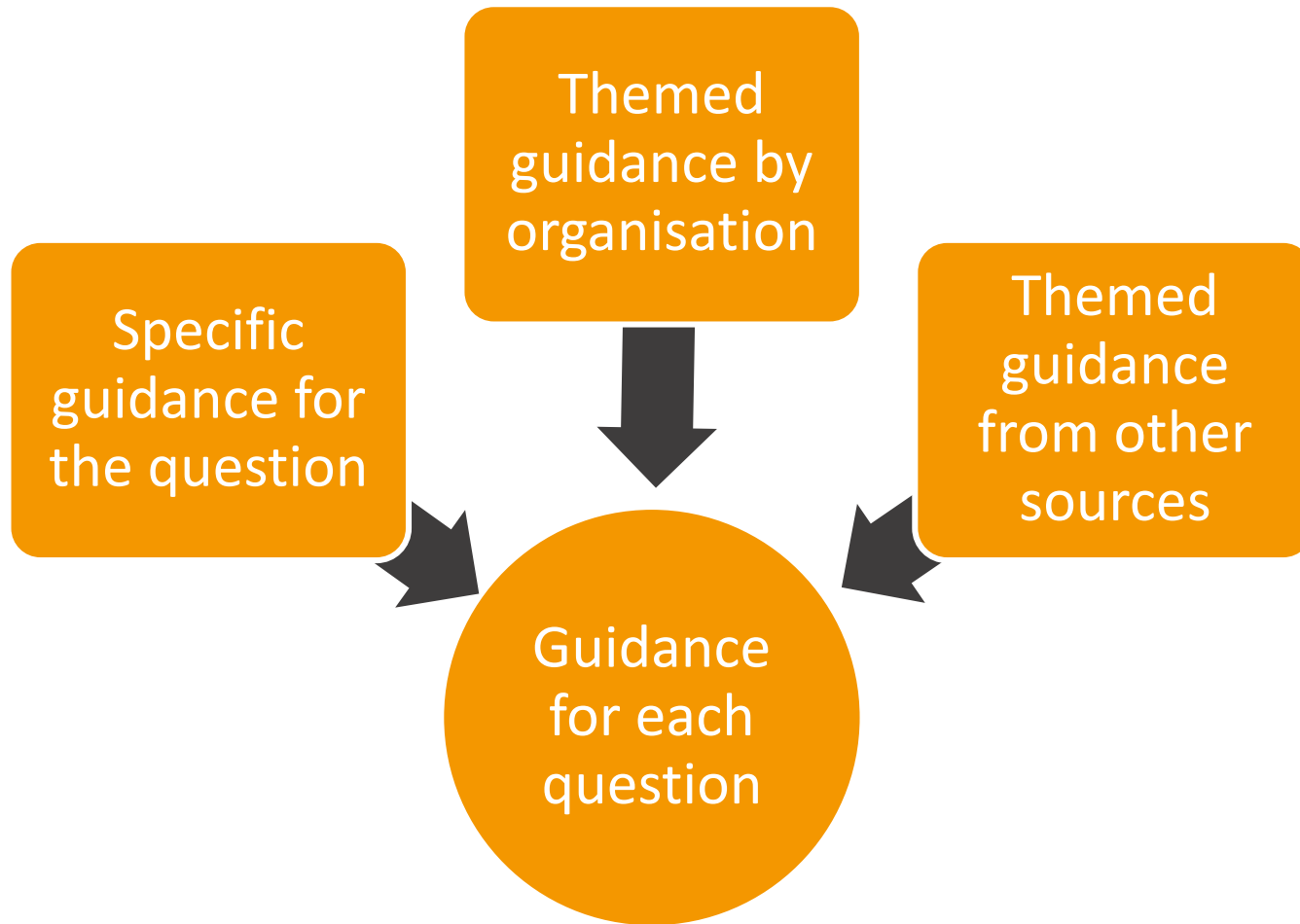
Will the grant produce data?

Yes No

NERC Guidance +

Version 2 of the Outline DMP currently in use

# Guidance in DMPonline



# Themes used in the tool

- Existing Data
- Data Description
- Data Format
- Data Type
- Data Volumes
- Data Capture Methods
- Documentation
- Metadata
- Data Quality
- Ethical Issues
- IPR Ownership and Licensing
- Data Security
- Storage and Backup
- Expected Reuse
- Discovery by Users
- Method for Data Sharing
- Timeframe for Data Sharing
- Restrictions on Sharing
- Managed Access Procedures
- Data Selection
- Period of Preservation
- Preservation Plan
- Data Repository
- Responsibilities
- Resourcing

# Organisational guidance

Guidance can be added **by theme** (to apply across the board) or can be written **for specific questions**

## Themed guidance

### Glasgow guidance on Storage and Backup

During a project data should be stored on backed up University servers or other suitably backed up services. If you need advice you can contact your [local IT Support](#) for advice or email [openaccess@glasgow.ac.uk](mailto:openaccess@glasgow.ac.uk).

Guidance that is presented whenever researchers are asked about storage and backup

## Specific guidance

### Glasgow guidance

The University provides a [template answer](#) for this MRC question which includes links to relevant policies.

Guidance that pertains to MRC question 7 only

# Guidance can be set at multiple levels

**DMP ONLINE**

Signed in as Sarah Jones ▾

[View plans](#) [Create plan](#) [About](#) [News](#) [Help](#)

## Create a new plan

Please select from the following drop-downs so we can determine what questions and guidance should be displayed in your plan.

If applying for funding, select your research funder.  
Otherwise leave blank.

European Commission (Horizon 2020) ▾  
[Not applicable/not listed.](#)

To see institutional questions and/or guidance, select your organisation.  
You may leave blank or select a different institution to your own.

University of Edinburgh ▾  
[Not applicable/not listed.](#)

Tick to select any other sources of guidance you wish to see.

☐ Generic guidance from the Digital Curation Centre


☐ Roslin Institute Guidance

[Create plan](#)

Options to have guidance at organisation and 'unit' level e.g. by discipline, group, department, institute...

# Admin interface demo

Allows you to add your own templates/guidance and view users



Signed in as Sarah Jones -

[Templates](#) [Guidance](#) [Organisation details](#) [Users](#)

## Templates

### Own templates

If you wish to add an institutional template for a Data Management Plan, use the 'create template' button. You can create more than one template if desired e.g. one for researchers and one for PhD students.

Your template will be presented to users within your institution when no funder templates apply. If you want to add questions to funder templates use the 'customise template' options below.

Create a template



Title	Description	Published	Last updated	Actions
UoE Data Management Plan	A suggested set of questions, based on the University of Edinburgh data policy	true	22-08-2014	<a href="#">Edit</a>
UoE Post-Graduate Student DMP	A DMP template for Post Graduate students at the University of Edinburgh to use.	false	22-08-2014	<a href="#">Edit</a>

## Funders templates

Title	Description	Published	Last updated	Actions
CRUK Template	CRUK template	true	16-09-2013	<a href="#">Customise</a>
BBSRC Template	BBSRC template	true	16-09-2013	<a href="#">Customise</a>
STFC Template	STFC template	true	09-10-2013	<a href="#">Customise</a>
AHRC Template	The default AHRC template	true	08-09-2013	<a href="#">Customise</a>
ESRC Template	ESRC template	true	16-09-2013	<a href="#">Customise</a>
MRC Template	MRC template	true	09-10-2013	<a href="#">Customise</a>
NERC Template	NERC requires a single page. Outline Data Management Plan (ODMP) for all... (continued)	true	30-05-2014	<a href="#">Customise</a>
Wellcome Trust Template	Wellcome Trust template	true	09-10-2013	<a href="#">Customise</a>
NSF - generic	Generic Data Management Plan template for the National Science Foundation I... (continued)	true	03-12-2013	<a href="#">Customise</a>
Horizon 2020 DMP	In Horizon 2020 a limited pilot action on open access to research data w... (continued)	true	15-02-2014	<a href="#">Customise</a>
EPSRC Data Management Plan		true	29-07-2014	<a href="#">Customise</a>

Contact us | Terms of use | DMPonline previous version

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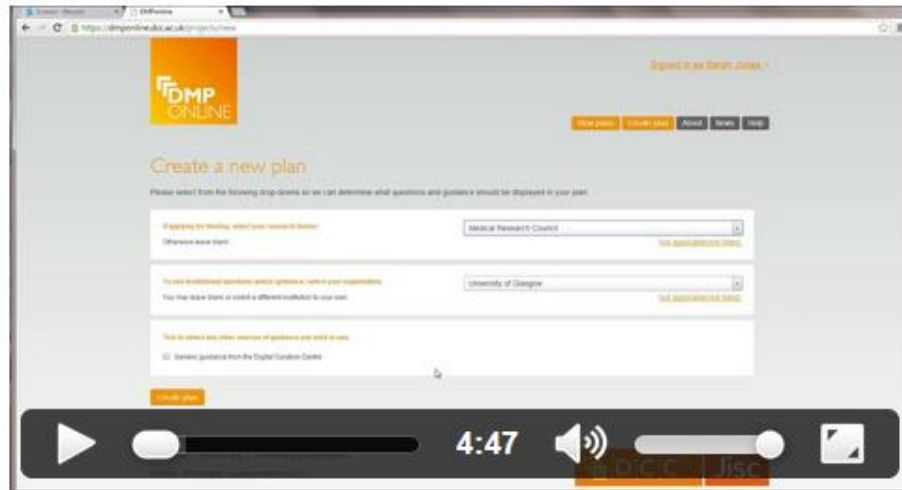
 



# More information

Screencast on how to use DMPonline

<http://www.screenr.com/PJHN>



Customising DMPonline

[www.dcc.ac.uk/news/customising-dmponline-admin-interface-launches](http://www.dcc.ac.uk/news/customising-dmponline-admin-interface-launches)



## GitHub

Get the code, amend it, run a local instance, flag issues, request features...

[https://github.com/DigitalCurationCentre/DMPonline\\_v4](https://github.com/DigitalCurationCentre/DMPonline_v4)



# Thanks for listening

DMP guidance, tools & resources:

[www.dcc.ac.uk/resources/  
data-management-plans](http://www.dcc.ac.uk/resources/data-management-plans)

Follow us on twitter:

@digitalcuration and #ukdcc #DMPonline

