

DMPTool

Guidance and Resources for your Data Management Plan

Sarah L. Shreeves

University of Illinois at Urbana-Champaign

IDCC 2013 * Amsterdam

January 14, 2013

http://dmptool.org

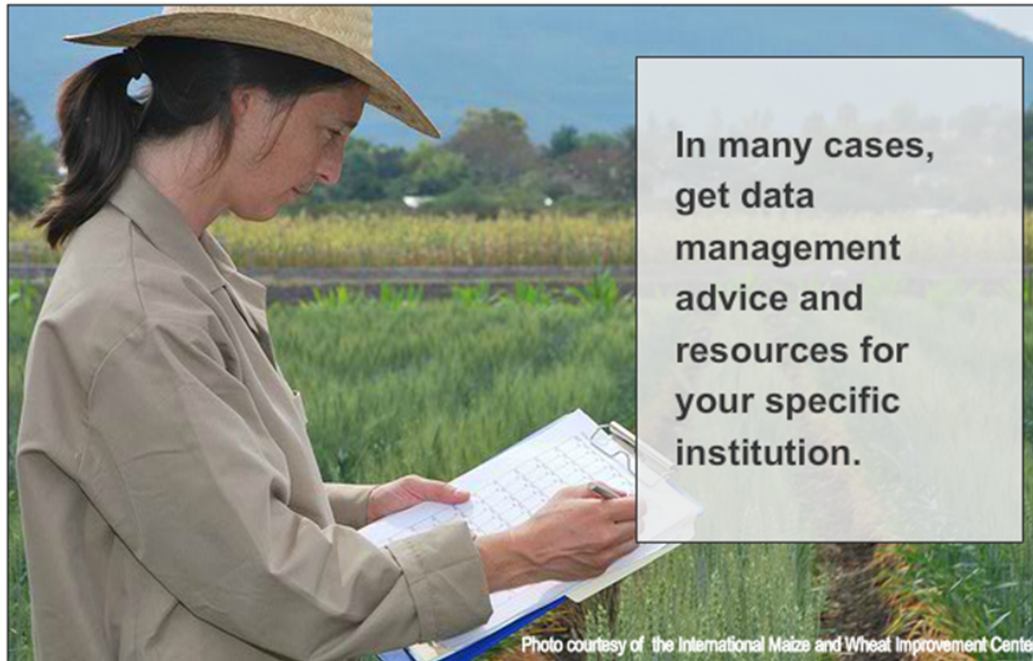


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DMP Tool

Guidance and Resources for your Data Management Plan

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Data Management Plan Atmospheric CO₂ Concentrations, Mauna Loa Observatory, 2011-2013

1. Types of data produced

Air samples at Mauna Loa Observatory will be collected continuously from air intakes located at five towers – a central tower and four towers located at compass quadrants. Raw data files will contain continuously measured CO₂ concentrations, calibration standards, reference standards, daily check standards, and blanks. The sample lines located at compass quadrants were used to examine the influence of source effects associated with wind directions (24). In addition to the CO₂ data, we will record weather data (wind speed and direction, temperature, humidity, precipitation, and cloud cover). Site conditions at Mauna Loa Observatory will also be noted and retained.

[See a plan created with the DMP Tool](#)

Recent DMP News

[DMPTool workshop at the DLF Fall Forum](#)

[DMPTool demo: Wed Oct 19](#)

[Importance of Data Management Education](#)

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The DMP Tool allows you to: **1 2 3 4**

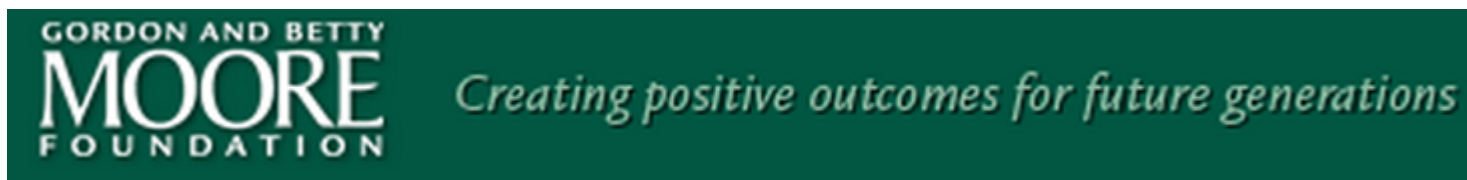
Why?



National Institutes of Health
NIH...Turning Discovery Into Health®



NOAA NATIONAL OCEANIC AND
ATMOSPHERIC ADMINISTRATION
UNITED STATES DEPARTMENT OF COMMERCE



Who?



DMPTool Participants

CDL/UC3

Trisha Cruse

Perry Willett

Marisa Strong

Tracy Seneca

Scott Fisher

Stephen Abrams

Mark Reyes

Margaret Low

Carly Strasser

DataONE

Amber Budden

Smithsonian

Günter Waibel

UCLA

Todd Grappone

Gary Thompson

Sharon Farbe

Darrow Cole

UCSD

Brad Westbrook

University of Illinois

Michael Grady

Howard Ding

Sarah Shreeves

University of Virginia

Andrew Sallans

Sherry Lake

Carla Lee

Digital Curation Centre

Martin Donnelly

When?

Inspiration at IDCC 2010 by the DMP Online:
<http://dmponline.dcc.ac.uk/>



First call in January 2011



First release in October 2011
(through in-kind contributions – no external funding!)

Goals of the DMPTool


- I. To provide researchers a simple way to create a Data Management Plan by giving them information from the funding agency:
 - Questions asked by the agency
 - Any additional explanation or context provided by the agency
 - Links to the agency website for policies, help, guidance
 - Includes all funders – private and public – that require a DMP

Goals of the DMPTool

- II. To provide researchers with additional information from their local institution:
 - Allow use of local login via Shibboleth
 - Resources and services to help them manage data
 - Help text for specific questions
 - Suggested answers to questions that they can simply cut-and-paste
 - News and events related to data management on their campus

DMPTool

Guidance and Resources for your Data Management Plan



In many cases, get data management advice and resources for your specific institution.

Photo courtesy of the International Maize and Wheat Improvement Center

The DMP Tool allows you to: **1** **2** **3** **4**

[Get Started!](#)

**Data Management Plan
Atmospheric CO2 Concentrations,
Mauna Loa Observatory, 2011-2013**

1. Types of data produced

An samples at Mauna Loa Observatory will be collected continuously from air intakes located at five towers – a central tower and four towers located at compass quadrants. Raw data files will contain continuously measured CO2 concentrations, calibration standards, reference standards, daily check standards, and blanks. The sample lines located at compass quadrants were used to examine the influence of source effects associated with wind directions (SW). In addition to the CO2 data, we will record weather data (wind speed and direction, temperature, humidity, precipitation, and cloud cover). Site conditions at Mauna Loa Observatory will also be noted and retained.

[See a plan created with the DMP Tool](#)

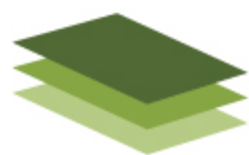
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Funder Requirements

Funder	Funder Link	Sample Plan	Funder Requirements Template	Supported in DMP Tool
Gordon and Betty Moore Foundation – GBMF	Guidelines		Template [RTF]	✓
IMLS	Guidance		Template [RTF]	✓
NEH – Office of Digital Humanities	Guidelines		Template [RTF]	✓
NIH – National Institutes of Health	Guidance		Template [RTF]	✓
NOAA– National Oceanic and Atmospheric Administration	Procedural Directive		Template [RTF]	✓
NSF – General	Grant Proposal Guide	NSF-GEN Sample 1 NSF-GEN Sample 2	Template [RTF]	✓
NSF – Astronomical Sciences	Advice to PIs		Template [RTF]	✓
NSF – Atmospheric & Geospace Sciences	AGS Advice		Template [RTF]	✓
NSF – Biological Sciences	Information	NSF-BIO Sample 1 NSF-BIO Sample 2	Template [RTF]	✓
NSF – Chemistry	Advice to PIs		Template [RTF]	✓
NSF – Computer and Information Science and Engineering	Advice to PIs		Template [RTF]	✓

As new Data Management Plan Guidelines become available, they will be added to this page and eventually to the DMPTool.

Disclaimer

The sample plans provided here may or may not be associated with successful grant applications. They may contain details not relevant to your specific project. They are provided only to illustrate representative responses.

Funder Key

NSF = National Science Foundation
NEH = National Endowment for the Humanities
IMLS = Institute of Museum and Library Services

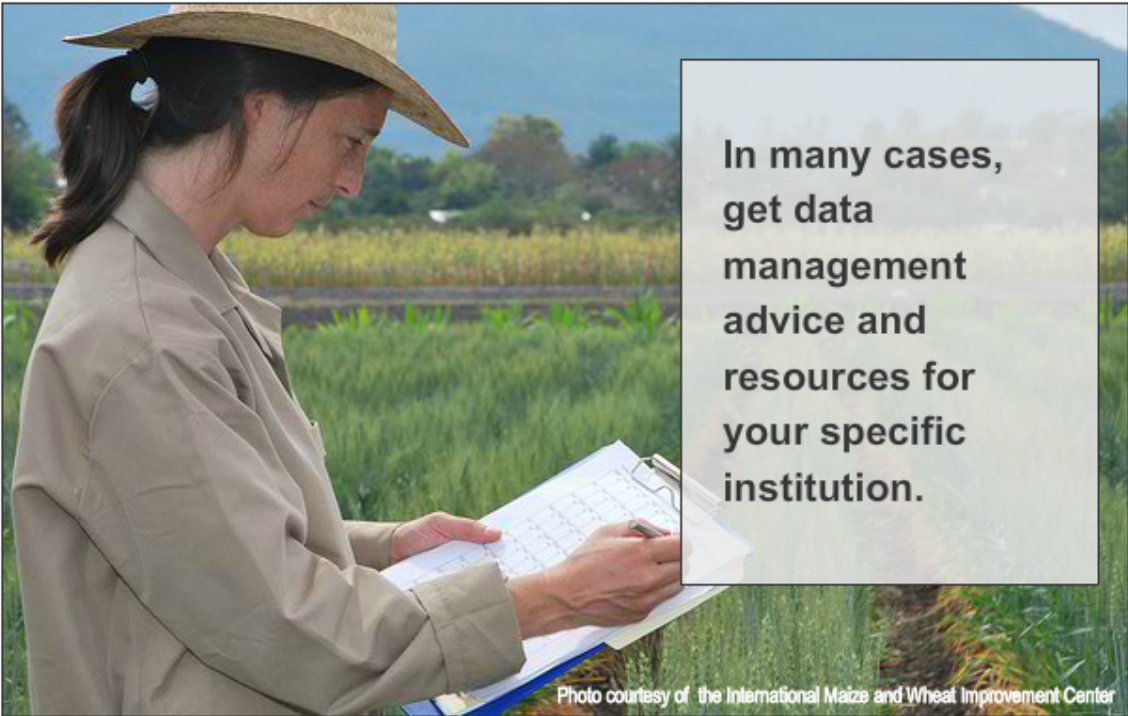
Additional DMP Tool Help

- [DMP Tool Guide](#)
- [Video Demo](#)

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- Help



In many cases, get data management advice and resources for your specific institution.

Photo courtesy of the International Maize and Wheat Improvement Center

The DMP Tool allows you to: 1 2 3 4

[Get Started!](#)

Data Management Plan Atmospheric CO2 Concentrations, Mauna Loa Observatory, 2011-2013

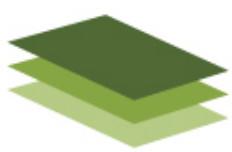
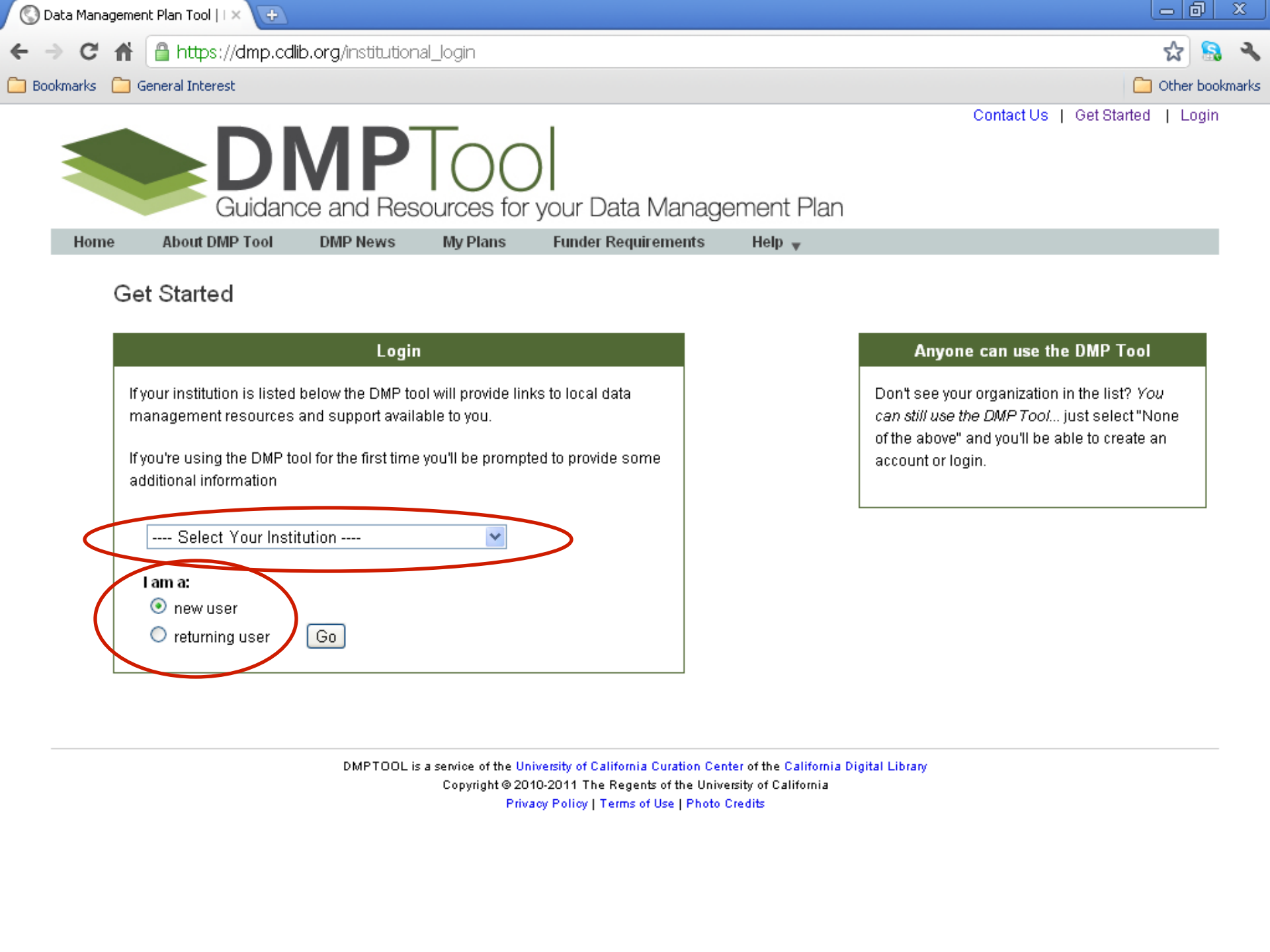
1. Types of data produced

All samples at Mauna Loa Observatory will be collected continuously from air intakes located at five towers – a central tower and four towers located at compass quadrants. Raw data files will contain continuously measured CO2 concentrations, calibration standards, reference standards, daily check standards, and blanks. The sample lines located at compass quadrants were used to examine the influence of source effects associated with wind directions (SW) in addition to the CO2 data. We will record weather data (wind speed and direction, temperature, humidity, precipitation, and cloud cover). Site conditions at Mauna Loa Observatory will also be noted and retained.

[See a plan created with the DMP Tool](#)

Recent DMP News

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- [DMPTool demo: Wed Oct 19](#)
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DMP Tool

Guidance and Resources for your Data Management Plan

Get Started

Login

If your institution is listed below the DMP tool will provide links to local data management resources and support available to you.

If you're using the DMP tool for the first time you'll be prompted to provide some additional information

---- Select Your Institution ----

I am a:

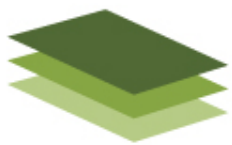
new user

returning user

Go

Anyone can use the DMP Tool

Don't see your organization in the list? *You can still use the DMP Tool...* just select "None of the above" and you'll be able to create an account or login.



DMPTool

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University of Illinois at Urbana-Champaign ▾

- Select Your Institution ----
- Smithsonian Institution
- UCLA
- University of California, Berkeley
- University of California, Davis
- University of California, Irvine
- University of California, Merced
- University of California, Office of the President
- University of California, Riverside
- University of California, San Diego
- University of California, San Francisco
- University of California, Santa Barbara
- University of California, Santa Cruz
- University of Illinois at Urbana-Champaign**
- University of Virginia
- None of the above

Anyone can use the DMP Tool

Don't see your organization in the list? *You can still use the DMP Tool...* just select "None of the above" and you'll be able to create an account or login.

ILLINOIS LOGIN



You must log in to continue.

Enter your **NetID**:

Enter your **Active Directory (AD) password**:

Login

Forgot your Active Directory password?

To change or reset your Active Directory password, go to the [CITES Password Manager](#).

More Information

Where to Get Help

Contact the [CITES Help Desk](#) at consult@illinois.edu.

What Is a NetID?

Your NetID serves as your login to many University computing and networking services and also determines your University email address, which is netid@illinois.edu.

For more information, see the [Your Network ID \(NetID\)](#) page.

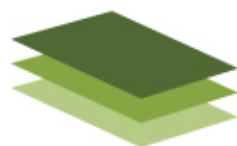
Technical Information

Service that has requested authentication:

Service Provider EntityID:
<https://dmp.cdlib.org>

This login service uses the following server:

shibboleth.illinois.edu



My Data Management Plans

Create a new plan:

Existing plans: 2

Plan name: Sample DMP

Solicitation No.:

Funder: NSF-SBE: Social, Behavioral, Economic Sciences

Status: You provided responses for 0 out of 6 questions

Comment:

[\[edit\]](#) [\[view\]](#) [\[delete\]](#) [\[share\]](#) **Export to:** Plain Text Rich Text

Plan name: The internal structure of turbidite deposits

Solicitation No.: NSF 09-56

Funder: NSF-GEN: Generic

Status: You provided responses for 1 out of 5 questions

Comment:

[\[edit\]](#) [\[view\]](#) [\[delete\]](#) [\[share\]](#) **Export to:** Plain Text Rich Text

Tips

Choose export to create a plan to save to your local drive.

In the future you will be able to choose publish to post a PDF version of this plan. You will be provided with a URL for the plan to share with others. You will then be able to retract a published plan if you no longer wish it to be publicly available.

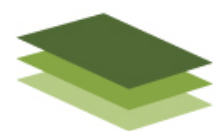
Recent DMP News

[More NSF divisions and directorates supported by the DMPTool](#)

[Joint US-UK data management planning workshop at IDCC11](#)

[Data management webinar, Dec. 15](#)

[More news >](#)



DMPTool

Guidance and Resources for your Data Management Plan

Contact Us | Manage Profile | Logout
You are logged in as Perry Willett

Help us improve the DMPTool:
[Take our survey!](#)

My Data Management Plans

Create a new plan: NSF-GEN: Generic

Existing plans: 2

- Plan Solicitat NSF-GEN: Generic
- Plan Solicitat Gordon and Betty Moore Foundation
- Plan Solicitat NEH-ODH: Office of Digital Humanities
- Plan Solicitat NSF-AGS: Atmospheric and Geospace Sciences
- Plan Solicitat NSF-AST: Astronomical Sciences
- Plan Solicitat NSF-BIO: Biological Sciences
- Plan Solicitat NSF-CHE: Chemistry Division
- Plan Solicitat NSF-CISE: Computer and Information Science and Engineering
- Plan Solicitat NSF-DMR: Materials Research
- Plan Solicitat NSF-EAR: Earth Sciences
- Plan Solicitat NSF-EHR: Education and Human Resources
- Plan Solicitat NSF-ENG: Engineering
- Plan Solicitat NSF-GEN: Generic
- Plan Solicitat NSF-PHY: Physics
- Plan Solicitat NSF-SBE: Social, Behavioral, Economic Sciences

Funder: NSF-BIO: Biological Sciences
Status: You provided responses for 5 out of 5 questions
Comment: This is an example Data Management Plan created by participants of a DataONE best Practices Workshop.

Link: <http://dmp.cdlib.org/pdf/461fef46-107b-11e1-af8a-0050569e0108.pdf>

[edit] [view] [delete] [retract] **Export to:** Plain Text Rich Text

Tips

Choose export to create a plan to save to your local drive.

You can choose to "share" a PDF version of your plans. You will be provided with a URL for the plan to share with others. You can retract a shared plan if you no longer wish it to be available.

Recent DMP News

[Take our user survey](#)

[Webinar on data management plans, Jan 11 and Jan 19](#)

[DMPTool at the Coalition for Networked Information Fall Membership meeting](#)

[More news >](#)

NSF-GEN: Generic: 1. Types of data produced

Types of data, samples, physical collections, software, curriculum materials, and other materials to be produced in the course of the project.

Progress

Click on a section below to edit it at any time.

✔ = complete

Plan description

- 1. Types of data produced**
2. Data and metadata standards
3. Policies for access and sharing
4. Policies for re-use, redistribution
5. Plans for archiving & preservation

Help box size: [small](#) | [medium](#) | [full](#)

Give a short description of the data, including amount (if known) and content. If the project will be collecting data of a sensitive nature, note here and reflect upon it in subsequent sections. Data types could include text, spreadsheets, images, 3D models, software, audio files, video files, reports, surveys, patient records, etc.

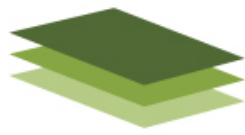
B *I* U abc X₂ X²

[Empty text area for data description]

[Preview](#) [Save](#) [Save and next](#)

Resources

- University of California, Office of the President**
[UC3: Creating data](#)
- [EZID: long-term identifiers made easy](#)
- [UC3: Data management plans](#)
- General**
[NSF Data Sharing Policy](#)
[NSF Data Management Plan Requirements](#)



NSF-GEN: Generic: 1. Types of data produced

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- What data will be generated in the research?
- What data types will you be creating or capturing?
- How will you capture or create the data?
- If you will be using existing data, state that fact and include where you got it.
- What is the relationship between the data you are collecting and the existing data?

B *I* U abc x_2 x^2 |

bed elevation needed to decide when the flow and the sediment transport reach conditions of mobile-bed equilibrium will be reported in an **Excel spreadsheet**. In the same Excel file, the relevant hydraulic parameters, e.g. Froude number, Shields number, will be computed for the conditions of mobile bed equilibrium. Finally, the grain size distributions of the samples of the bedload / sheet flow layer and of the bed surface collected with the siphons at mobile bed equilibrium will be reported in a separate worksheet. Bed elevation fluctuations measured with the ultrasonic transducers will be saved in separate Excel files. The relevant statistics of the bed elevation fluctuations will be reported in a separate file. Fluctuations recorded with the ultrasonic probes will be reported in an Excel spreadsheet. The relevant statistics of the bed elevation fluctuations will be reported in a summary file. Readings of the water surface elevation and estimates of the thickness of the sheet flow layer from the high definition videos will be recorded in separate files.

body p strong

Resources

General

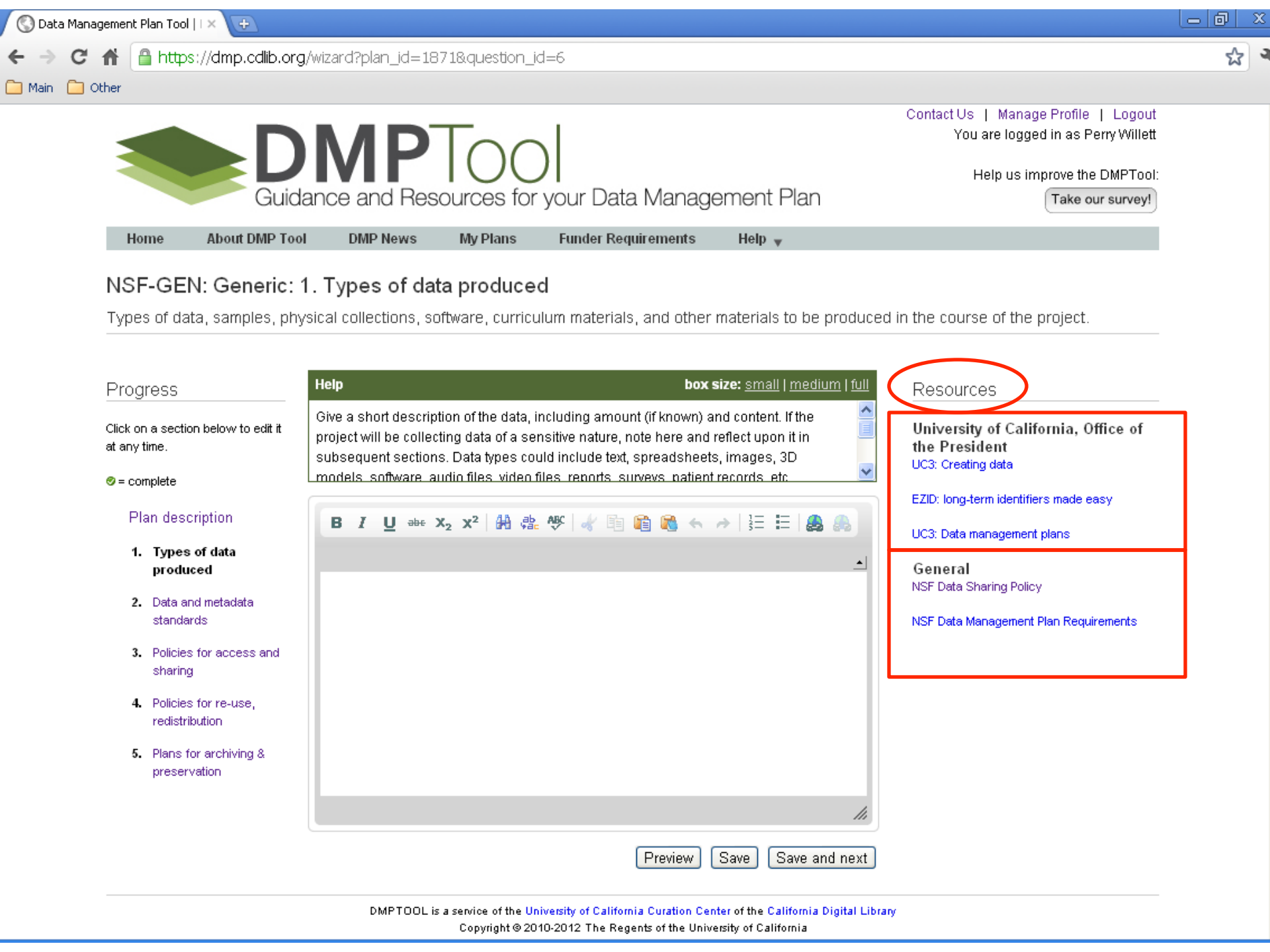
[NSF Data Sharing Policy](#)

[NSF Data Management Plan Requirements](#)

Preview

Save

Save and next



NSF-GEN: Generic: 1. Types of data produced

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Rich text editor toolbar with icons for Bold, Italic, Underline, text color, background color, bulleted list, numbered list, link, unlink, insert link, insert image, undo, redo, indent, outdent, fullscreen, and print.

[Preview](#) [Save](#) [Save and next](#)

Resources

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- General**
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✔ = complete

Plan description

- ✔ 1. Types of data produced
- ✔ 2. Data and metadata standards
- ✔ 3. Policies for access and sharing
- 4. Policies for re-use, redistribution
- 5. **Plans for archiving & preservation**

Suggested answer text

(copy and paste as needed)

box size: [small](#) | [medium](#) | [full](#)

The data generated under this project and information supporting preservation and reuse will be deposited in IDEALS (Illinois Digital Environment for Access to Learning and Scholarship), the campus digital repository at <http://www.ideals.illinois.edu/>.

IDEALS is designed to collect, disseminate, and provide persistent and reliable, long term open access to the research and scholarship of faculty, staff, and students at the University of Illinois. IDEALS is managed by the University Library in partnership with the Office of the CIO at UIUC.

Help

box size: [small](#) | [medium](#) | [full](#)

This portion of the Data Management Plan asks the researcher to provide a long-term strategy for archiving and preserving the data from the research described in the proposal.

Consider these questions:

- What is the long-term strategy for maintaining, curating and archiving the data?
- Which archive/repository/database have you identified as a place to deposit data?
- What procedures does your intended long-term data storage facility have in place for preservation and backup?
- How long will/should data be kept beyond the life of the project?

Also consider these questions about the data and associated information that will be deposited:

- What data will be preserved for the long-term?
- What transformations will be necessary to prepare data for preservation / data sharing?
- What metadata/ documentation will be submitted alongside the data or created on deposit/ transformation in order to make the data reusable?
- What related information will be deposited?

Additional help for: University of Illinois at Urbana-Champaign

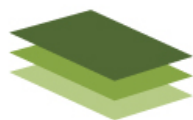
The UIUC Library in partnership with the Office of the CIO maintains IDEALS, a digital repository for access and long term preservation of research and scholarship on campus. Data and supporting material will be retained and managed indefinitely. In consultation with the IDEALS Coordinator, you may elect to have your research data retained and managed for a specified period of time.

Unless you have decided to submit your research data to a discipline-specific repository that provides preservation and discipline-specific access, then you should consider adapting and extending the suggested answer to complete this section of your data management plan.

General

[NSF Data Sharing Policy](#)

[NSF Data Management Plan Requirements](#)



Progress

Click on a section below to edit it at any time.

✔ = complete

[Plan description](#)

- ✔ 1. Types of data produced
- ✔ 2. Data and metadata standards
- ✔ 3. Policies for access and sharing
- 4. Policies for re-use, redistribution
- ✔ 5. Plans for archiving & preservation

Finish NSF-GEN: Generic: The internal structure of turbidite deposits

Your data management plan is displayed below. You can still use the side navigation to edit any section of the plan.

Export to: Plain Text Rich Text



Data Management Plan

The internal structure of turbidite deposits

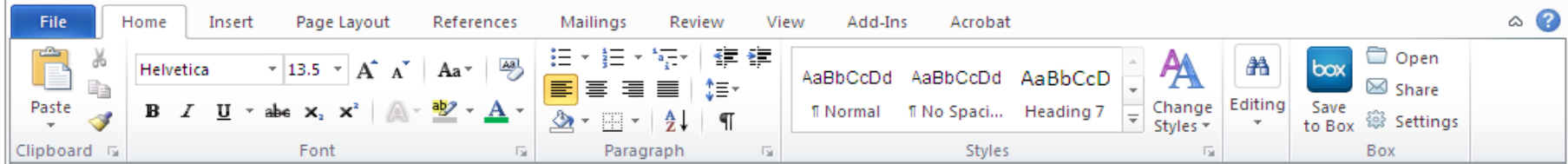
1. Types of data produced

The laboratory data recorded in each experimental run will be divided in three groups: equilibrium measurements, non-equilibrium measurements, and characteristics of the bed deposit. Each experiment will be characterized in terms of water discharge, sediment feed rate, grain size distribution of the sediment feed, and rate of rise of the tailgate. These parameters will be reported in all the data files for that experimental run. Successive readings of water surface elevation and bed elevation needed to decide when the flow and the sediment transport reach conditions of mobile-bed equilibrium will be reported in an **Excel spreadsheet**. In the same Excel file, the relevant hydraulic parameters, e.g. Froude number, Shields number, will be computed for the conditions of mobile bed equilibrium. Finally, the grain size distributions of the samples of the bedload / sheet flow layer and of the bed surface collected with the siphons at mobile bed equilibrium will be reported in a separate worksheet. Bed elevation fluctuations measured with the ultrasonic transducers will be saved in separate Excel files. The relevant statistics of the bed elevation fluctuations will be reported in a separate file. Fluctuations recorded with the ultrasonic probes will be reported in an **Excel spreadsheet**. The relevant statistics of the bed elevation fluctuations will be reported in a summary file. Readings of the water surface elevation and estimates of the thickness of the sheet flow layer from the high definition videos will be recorded in separate files.

2. Data and metadata standards

We will use the standard metadata formats required by the National Centre for Earth-surface Dynamics (NCED).

3. Policies for access and sharing



The image shows the Microsoft Word ribbon with the following tabs: File, Home, Insert, Page Layout, References, Mailings, Review, View, Add-Ins, and Acrobat. The Home tab is active, showing options for Font (Helvetica, 13.5, bold, italic, underline, text color, background color), Paragraph (bulleted list, numbered list, decrease/increase indent, bulleted list with numbers, decrease/increase indent with numbers, bulleted list with letters, decrease/increase indent with letters), Styles (Normal, No Spacing, Heading 7), and Editing (Change Styles, Editing, Save to Box, Open, Share, Settings).

Data Management Plan: The internal structure of turbidite deposits

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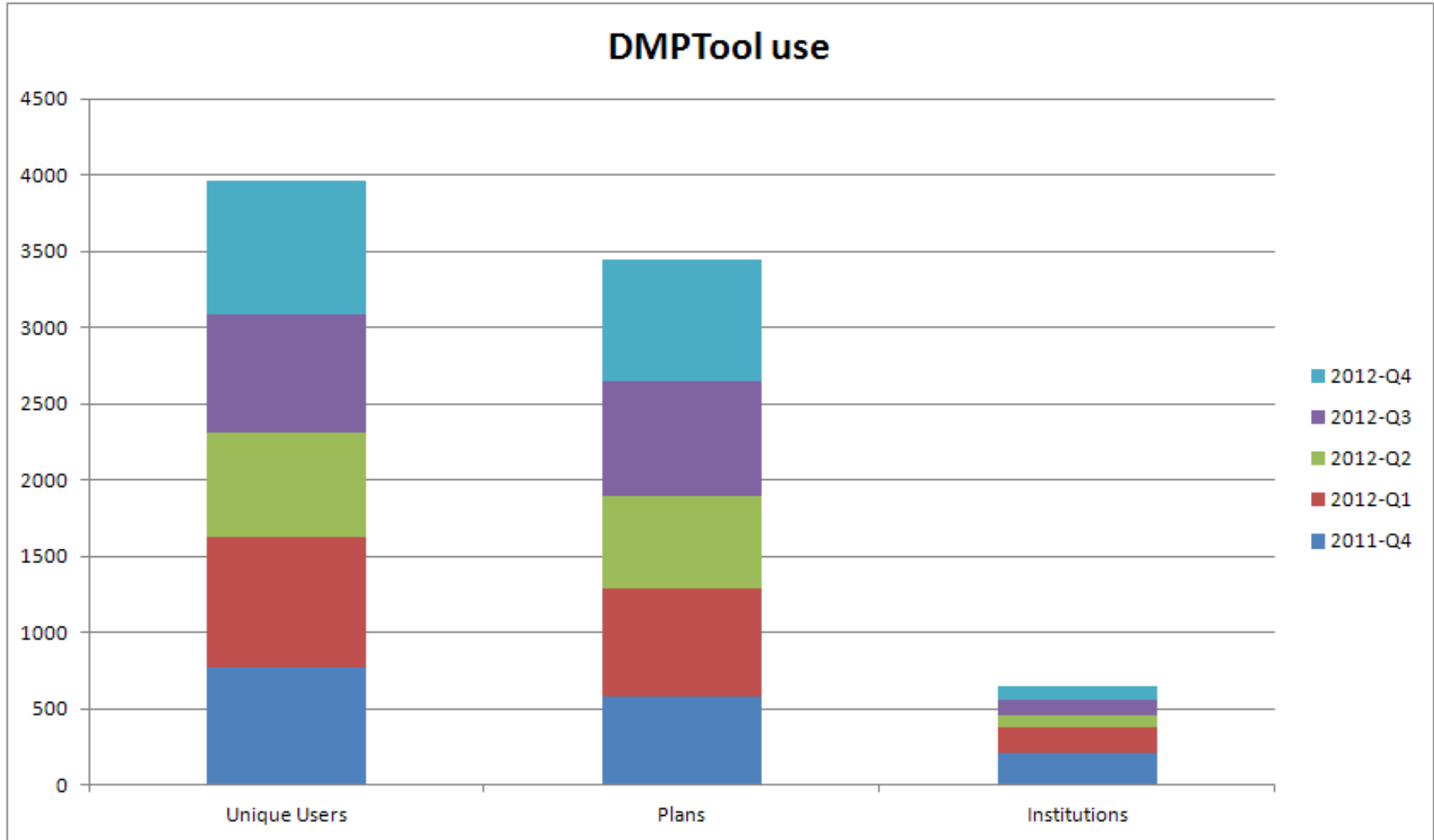
2. Data and metadata standards

Increasing Participation

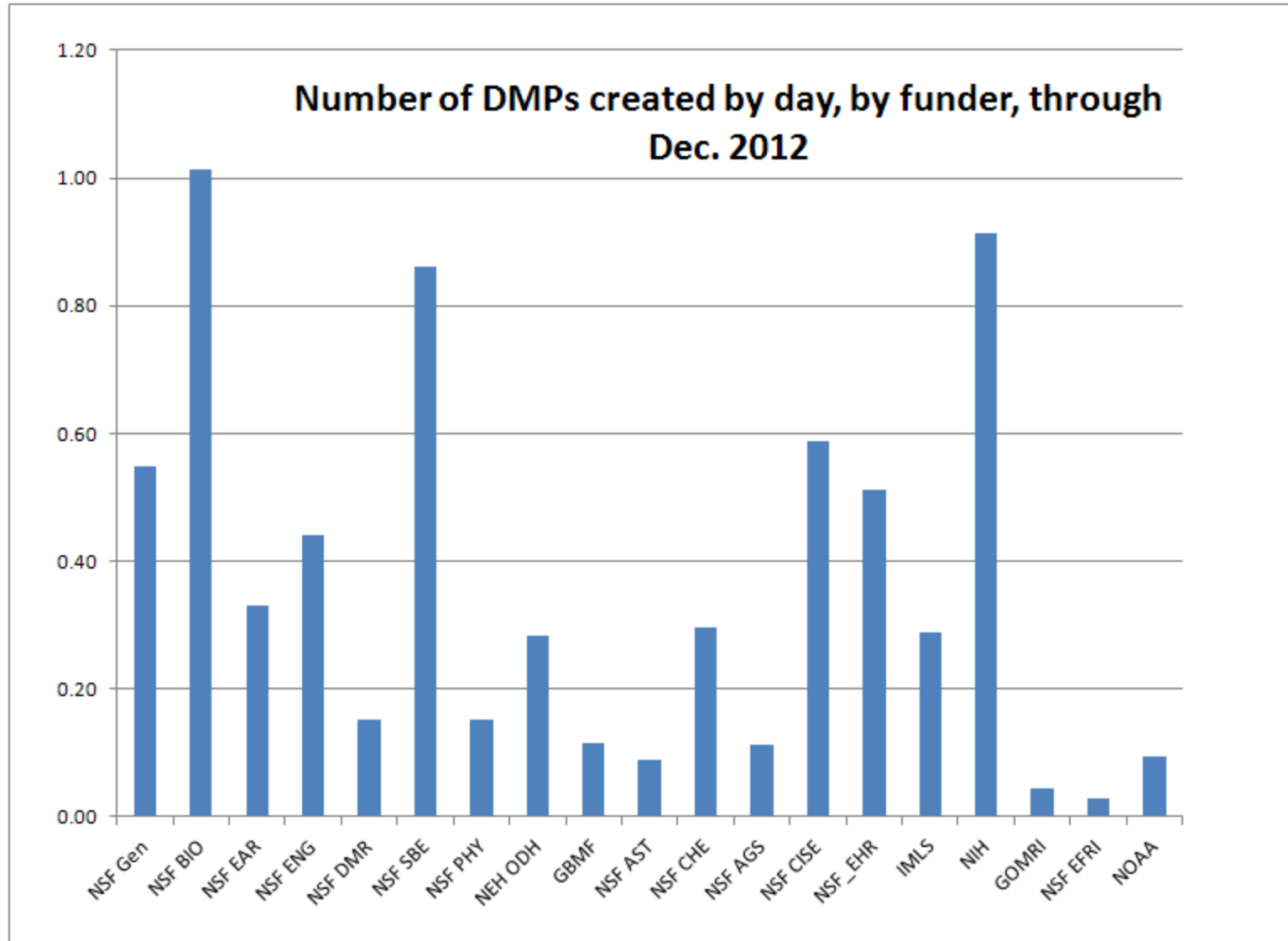
Some of the Organizations with Shibboleth log-in set up

American University	Michigan State University	UC Office of the President
Arizona State University	Moss Landing Marine Laboratories (CSU)	UC San Diego
Cal Poly State University	North Carolina State University	UC San Francisco
Cal State Chico	Northwestern University	University of Chicago
Cal State Fresno	Ohio State	University of Illinois at Chicago
Cal State Los Angeles	Old Dominion University	University of Illinois at Urbana-Champaign
Cal State Office of the Chancellor	Penn State	University of Iowa
Clemson University	Purdue	University of Miami
George Mason University	Rice University	University of Michigan
Georgia Tech	Smithsonian Institution	University of Nebraska-Lincoln
Humboldt State University (CSU)	Texas A&M	University of North Carolina-Chapel Hill
Indiana University	Texas State University San Marcos	University of Notre Dame
Iowa State University	Tulane University	University of Texas at Austin
James Madison University	University of Arizona	University of Virginia
Johns Hopkins University	UC Los Angeles	University of Wisconsin-Madison
	UC Berkeley	Yale University...
	UC Davis	
	UC Irvine	
	UC Merced	

Increasing Use (Oct 2011-Dec 2012)



DMPs created by day, by funder through Dec 2012

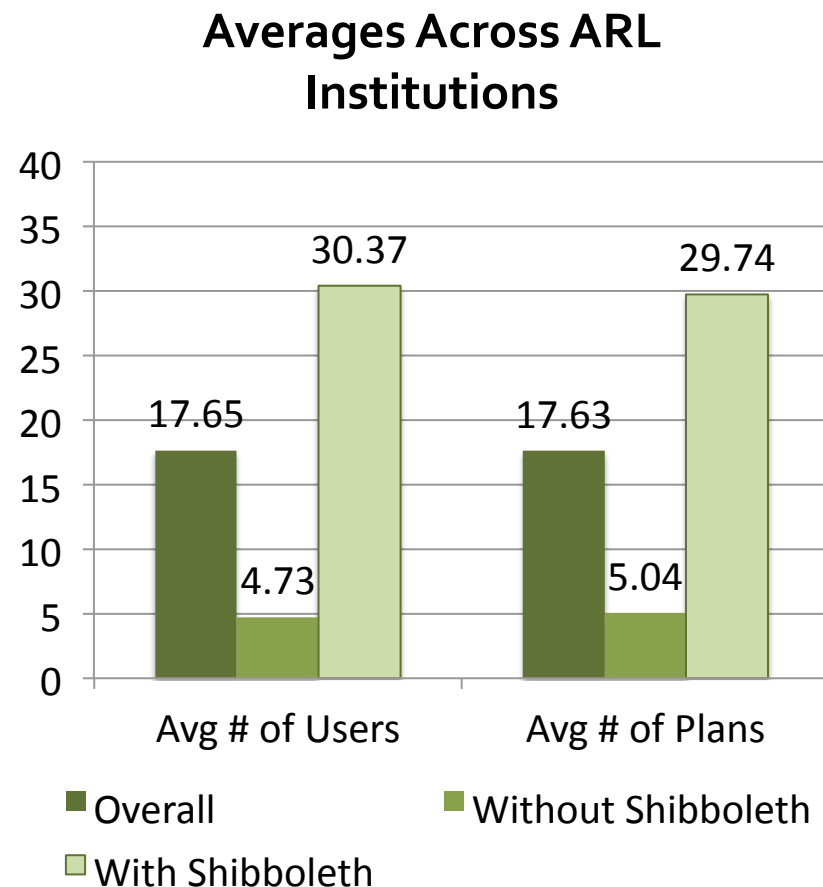


Usage by ARL Institutions

Users at 77% of ARL institutions

Shibboleth authentication in use at 34% of ARL institutions

Difference of 25.64 users between averages of institutions with and without Shibboleth authentication



Takeaway: Shibboleth authentication appears to be a critical turning point demonstrating institutional commitment and gains in value/ROI.

How do we get involved?

- Work with your **Office of Research** and **Library** to get involved
- **Configure Shibboleth** login
- **Customize the tool** by adding links to local resources, help text, suggested answers, contact information
- **Blog** for local news and events

Want your institution to get involved? Contact uc3@ucop.edu

What's Next?

Governance and Sustainability

Unveiling a **new governance plan**

Formalizing a steering group

- clear process for joining, decision making, roles and responsibilities

DMPTool stays free

- covering development and management costs through voluntary in-kind, grant, or cash contributions of Partners

Training through IMLS Grant



Improving Data Stewardship with the DMPTool

1. Provide librarians with the tools and resources to claim the data management education space.
2. Promote the use of and improve upon the current DMPTool.

Improvement via A.P. Sloan Grant



**ALFRED P. SLOAN
FOUNDATION**

Data Management Planning
Tool 2: Responding to the
Community

1. **Build community** of researchers, institutions, funders, & libraries
2. **Expand functionality** of the current DMPTool for users & administrators
3. **Release the DMPTool2** and provide training/documentation
4. **Create an open-source community** of DMPTool contributors

New Areas of Development

New Function	Benefit
Granular modeling of institutions	Institutions can be represented in any or all of three roles: as a funder, as a researcher's affiliation, and/or as an institution with its own DMP requirements.
Role-based user authorization	Users can hold various roles: plan creators, collaborators, institutional/organizational administrators, and tool administrators, with differing authorizations and capabilities.
DMP life cycle management	Users can track the changes as a plan passes through the major stages of its life cycle, including creation, editing, submission, evaluation and approval or rejection, revision and publication.
Organizational planning activities	Institutions/organizations can define and implement planning activities, with consideration of local resources and needs.
Enhanced search and browse	Users can both perform keyword searches and browse publicly available plans, providing for enhanced discovery
Institutional branding	Two aspects: (1) hosting neutrality of the DMPTool, that is, removing association of the tool with the California Digital Library via the current domain name dmp.cdlib.org; and (2) increased online institutional branding within the tool's user interface
Search and reporting for business intelligence	Institutional administrators can mine data on plans, with the ability to filter plans based on their state, users, institutional role and other relevant plan properties.
Advanced administrative interface	Administrators can easily add new funders, requirements, and institutional resources via the enhanced configuration interface
Collaborative plan creation	Multiple users across institutions can access and/or edit the same plan.
Open API	The tool will be more easily integrated into local automated workflows.

We want to hear from you!

- What functionality are you looking for?
- Would you be willing to help us test new functionality and give feedback?

Hiring!

- Summer 2013 Intern
 - Expecting to have a role for an intern to help with project development coordination in coming summer
 - Contact Andrew Sallans: als9q@virginia.edu
- 2 developers for DMPTool2
 - Contact UC3/CDL: uc3@ucop.edu
- .5 Community Outreach Coordinator
 - Contact Sarah Shreeves sshreeve@illinois.edu

Final Takeaways

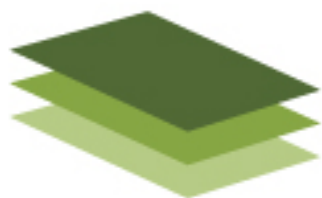


1. Potential to be a **data management focal point** for the community
2. Can function as the **coordinating mechanism** for an institution
3. Can be used to **scale services** at both big and small institutions, with or without dedicated staff

Contact info

- Want your institution to get involved?
Contact uc3@ucop.edu
- Track new activities at
<http://blogs.library.ucla.edu/dmptool/>

Thank you!



DMPTool

Guidance and Resources for your Data Management Plan