Data Management Planning Tool(s)

DataONE Users Group
July 2014

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California Digital Library, University of Virginia Library
Road Map

1. Background
2. New website overview
3. What researchers can do
4. What DMPTool admins can do
5. take-homes
6. Q&A
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Partners started working in January 2011
Released in October 2011
Developed requirements, divided work
Self-funded / In-kind
• Connect researchers with resources to build quality DMPs

• Version 1:
  – Built for researchers
  – No functionality for editors or admins
  – URL redirect to CDL

http://dmptool.org
http://dmp.cdlib.org
- Funded by
  - Alfred P. Sloan Foundation
  - Institute of Museum and Library Services
- Distributed project partners
- Improvements for researchers & institutional administrators
- Expanding outreach
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New Stuff

- Admin tools
- Data management guidance
- Community resources
- Public DMPs
- Partners page
- External help
  - FAQ
  - Administrator help Wiki
  - Blog
Live Demo – New Website

1. Overall layout
2. Navigation
3. Help
   a) FAQ
   b) Wiki
4. Promotional materials
5. News
6. Video
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Two roles

1. Researcher
   -- the user

2. Administrator
   -- the setup person
Researchers

• Create new plan
• Copy existing plans
• Work collaboratively
  – Owner & co-owner
• Request a review of their plans
• Share their plans within their institutions
• Provide public access to their plans
Data Management Planning Tool

Create, review, and share data management plans that meet institutional and funder requirements.

Log in

PUBLIC DMPS

List of sample data management plans provided by DMPTool users.

- American University
- George Mason University
- North Carolina State University
- Smithsonian Institution
- University of Arizona

View All

DMPTOOL NEWS

Latest information about data management and the DMPTool.

- DMPTool2 Release Schedule Update
- DMPTool 2 Feature Highlight: Guidance a...
- DMPTool 2 Feature Highlight: Co-Ownersh...
- Call for Example Data Management Plans
- What are your burning questions about t...

More News

DMPTOOL HELP

Overview of how to use the tool, plus resources and guidance on data management.

- Frequently Asked Questions
- Create a DMP
- Administer the DMPTool
- Data management guidance
- Community resources

View All
Select Institution

If your institution is a partner, you will be redirected to their login page.
Your institution not listed? Select “Non-partner”

Then create an account
Set up your profile & notification preferences

ORCID Identifier
Dashboard overview of DMPs

<table>
<thead>
<tr>
<th>My DMPs</th>
<th>My DMPs under review</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 plans I own</td>
<td>No DMPs are under review.</td>
</tr>
<tr>
<td>0 plans I co-own</td>
<td></td>
</tr>
</tbody>
</table>

Create new DMP
Either copy an existing DMP
Select Funder

Select one of the funder DMP Templates listed to proceed to the next step. The type of template chosen can affect what information you will need to provide in the following steps.

Name
- Gordon and Betty Moore Foundation
- Gulf of Mexico Research Incident
- National Institutes of Health
- National Oceanic and Atmospheric Administration
- National Science Foundation
  - NSF-AGS: Atmospheric and Geospace Sciences
  - NSF-AST: Astronomical Sciences
  - NSF-BIO: Biological Sciences
  - NSF-CHE: Chemistry Division
  - NSF-CSE: Computer and Information Science and Engineering

Select Funder
Fill out basic information about the plan.
Co-owners can

- Edit
- Preview
- Download
Three options:
1. Private – owners & co-owners only
2. Within institution
3. Publicly
NSF-AGS: Atmospheric and Geospace Sciences

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

☑ = Complete
☒ = Mandatory

Template Outline

- Products of research
- Data format
- Access to data, and data sharing practices and policies
- Policies and provisions for re-use, re-distribution and production of derivatives
- Archiving of data

Instructions & help

Instructions

Describe the types of data and products that will be generated in the research, such as physical space and/or time-dependent information on chemical and physical processes, images, etc. Include intermediate numerical results, theoretical formalisms, computational strategies, software materials.

Guidance

Give a short description of what "data" and "data collection" will mean in your research. Include the size or amount of data produced each year (if not known, provide an estimate). Make sure to mention what type of data is being produced; where and when the data will be produced. Consider if your data

Answer questions

Save Response
Save and Next
1. Products of Research

The project will collect and analyze the following data: Conductivity and temperature from moorings and shipboard CTD, horizontal currents from Lowered ADCP and moorings, Horizontal currents from shipboard sonar, Fine and micro-structure data from the WHOI High Resolution, Fine and micro-scale temperature from fast-response thermistors.

2. Data Storage and Preservation

Data will be shared in matlab MAT format and/or as netCDF files. Data quality will be in accord with published uncertainty ranges for each instrument and within error bars for standard processing techniques. These PIs have experience with this mix of data types from previous collaborative reports. Data responsibilities include: PI Responsibility: A. Thurnherr. LADCP-CTD analysis: L. St. Laurent and E. Shroyer. HRP microstructure analysis: S. Jachec. Ongoing model output prediction: J. Moum, J. Nash. Microstructure data: M. Alford, J. Nash, J. MacKinnon.

3. Data Formats and Metadata

All field data collected under this program will be made available as per NSF guidelines within 2 years of collection via published manuscripts, publicly available final reports to NSF, and data archiving with NODC. Recognizing that any individual PI server may become unavailable over time, data will be made available by PI website locations and also by specific request to any colleague.

4. Data Dissemination & Policies for Data Sharing and Public Access

Aside from the LADCP-shipboard CTD there are currently no established standards for archiving or data from many of the fine- and micro-scale sensors used in the proposed work. This is a concern of the Climate Process Team on Ocean Mixing, of which many PIs are members. We propose to work with the CPT to evolve formats for data and metadata suitable for archiving both sensor and (critically) model output from the experiment. Field data will be provided to NODC upon project completion. Ultimate archival formats will be determined in consultation with NODC and with the CPT. Adequate archiving is anticipated to be an expensive, time-consuming task. All PIs have included funds for this in their budgets.

5. Roles and Responsibilities

Models codes to be employed are all public domain. Published peer-reviewed manuscripts will document the simulations and forcing sufficiently.
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Administrators

• Several new admin roles
  – DMP template editor
  – Resources editor
  – Institutional reviewer
  – Institutional administrator

• Review of plans can be mandatory or optional

• Implement institutional DMPs
### Institution Profile

<table>
<thead>
<tr>
<th>Institution Information</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Institution Full Name</strong></td>
<td>University of California, Office of the President</td>
<td></td>
</tr>
<tr>
<td><strong>Entity Id</strong></td>
<td>um:mace:incommon:ucop.edu</td>
<td></td>
</tr>
<tr>
<td><strong>Shibboleth Domain</strong></td>
<td>ucp.edu</td>
<td></td>
</tr>
<tr>
<td><strong>Parent Institution</strong></td>
<td>none</td>
<td></td>
</tr>
<tr>
<td><strong>Institution short name, or acronym</strong></td>
<td>UC3</td>
<td></td>
</tr>
<tr>
<td><strong>Institution URL</strong></td>
<td>UC3</td>
<td><a href="http://hdl.handle.net/10115/uc3">http://hdl.handle.net/10115/uc3</a></td>
</tr>
<tr>
<td><strong>Administrator Contact</strong></td>
<td>UC3</td>
<td><a href="mailto:uc3@ucop.edu">uc3@ucop.edu</a></td>
</tr>
<tr>
<td><strong>Institutional Logo</strong></td>
<td><img src="image" alt="UC3 Logo" /></td>
<td></td>
</tr>
</tbody>
</table>

**Local web page**

Contact information

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**logo**
Expanded Administrative Roles

Institutional Administrator

• Assigns institutional roles
• Performs all other editor roles

Template Editor

• Creates & edits DMP institutional templates

Resources Editor

• Local help text
• Links to resources
• Suggested answers
• Example answers
### OVERVIEW

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- **Create New DMP**

### DMPS FOR MY REVIEW

- 0 DMPs pending review
- 0 DMPs finished review

### DMP TEMPLATES

<table>
<thead>
<tr>
<th>Within my Institution</th>
<th>Funder Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 DMP Templates only visible to my institution</td>
<td>0 Public DMP Templates from my institution</td>
</tr>
</tbody>
</table>

- **Create New DMP Template**
## DMP Template Customizations

<table>
<thead>
<tr>
<th>Name</th>
<th>Associated DMP Template</th>
<th>Institution</th>
<th>Creation Date</th>
<th>Last Modification Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>UVa Biology Dept for University of Virginia</td>
<td>UVa Biology Dept</td>
<td>University of Virginia</td>
<td>02/13/2014 01:05AM</td>
<td>02/13/2014 01:05AM</td>
</tr>
<tr>
<td><strong>UVa VPR Office for University of Virginia</strong></td>
<td><strong>UVa VPR Office</strong></td>
<td>University of Virginia</td>
<td>02/20/2014 09:03PM</td>
<td>02/20/2014 09:03PM</td>
</tr>
</tbody>
</table>

[View All]

[Create New Customization]
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Take-homes

• Free and open to all
• Application plus
• Data migrated to new DMPTool
• Collaborate across institutions
• Set the visibility of plans: private, X people, institution, public
• Become a partner
• Wanted: API testers
Questions?

DMP Tool
Build your Data Management Plan

Website dmptool.org
Twitter @TheDMPTool
Blog blog.dmptool.org
Email uc3@ucop.edu