



Data Management Planning: What, Why, How?



With thanks to Sarah
Jones & other DCC
colleagues

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because good research needs good data

What we will cover today

- What are DMPs?
- Why are they important?
- Implementation in UK (look at funders, researchers, universities)
- Examples of requirements
- Tools and resources to support them

WHAT ARE DATA MANAGEMENT PLANS?

Rather.. What is data management?

- Thinking in advance about data collection, management, disposal, protection, description, reuse
- Active work during research to ensure data is used to support current (and future) research objectives
- Ensuring useful data survives the project and ends up somewhere that can care for it (and make it citable and reusable)
- Part of good research design

A data management plan is a document which captures and documents this part of the project planning

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



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Possible elements of a plan

- Introduction & context
- Legal, rights & ethical issues
- Access, data sharing & re-use
- Data collection / development methods
- Data standards
- Short-term data storage & data management
- Deposit & long-term preservation
- Resourcing
- Compliance & review
- Agreement/ratification by stakeholders

For some areas of research, some of these areas will be empty or irrelevant – that doesn't matter

WHY HAVE PLANS?

Why care about data?

- Data is expensive – an investment
- Reuse:
 - More research
 - Teaching & Learning
 - Planning
- Impact – with or without publication
- Accountability
- Legal requirements

Research data has value

- Huge lost potential through not making data findable and reusable
- Benefits to researcher, funder, university and to society
- Reusable data makes research quicker, cheaper, better
- Good data management ensure this happens
- Plans document our intent – allow problems to be fixed quickly

“Provision for data management, for curation and long-term preservation, and for the sharing and re-use of data, varies wildly between subject areas.”

The data management needs of many researchers are little considered or catered for.

If greater provision is to be made, a shortfall in infrastructure (both technical and human) must be overcome.

Policy makers are aware that in many areas of enquiry, researchers' access to well-managed, open and reusable data opens up significant opportunities.

Yet...

- “No battle plan survives contact with the enemy”
 - Helmuth von Moltke the elder
- “... I have always found that plans are useless, but planning is essential”
 - Dwight D. Eisenhower
- The data management plan is an evolving object, along with the research

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!

EXAMPLE REQUIREMENTS

Funder requirements

● Full Coverage ◐ Partial Coverage ○ No Coverage

Research Funders	Policy Coverage		Policy Stipulations					Support Provided			
	Published outputs	Data	Time limits	Data plan	Access/sharing	Long-term curation	Monitoring	Guidance	Repository	Data centre	Costs
AHRC	●	●	●	●	●	◐	○	●	○	◐	◐
BBSRC	●	●	●	●	●	●	●	●	●	◐	●
CRUK	●	●	●	●	●	●	●	◐	●	○	○
EPSRC	●	●	●	◐	●	●	●	◐	○	○	●
ESRC	●	●	●	●	●	●	●	●	●	●	◐
MRC	●	●	●	●	●	●	○	◐	●	○	◐
NERC	●	●	●	●	●	●	●	●	●	●	◐
STFC	●	●	●	●	●	●	●	◐	●	◐	◐
Wellcome Trust	●	●	●	●	●	●	●	●	●	◐	●

RCUK policy - The 1-minute version

- Research data are a public good – make openly available in timely & responsible way
- Have policies & plans. Data with long-term value should be preserved & usable
- Metadata for discovery & reuse. Link publications & data
- Sometimes law, ethics get in the way. We understand.
- Limited embargos OK. Recognition is important – always cite data sources
- OK to use public money to do this. Do it efficiently.

EPSRC policy points

- Awareness of regulatory environment
- Data access statement
- Policies and processes
- Data storage
- Structured metadata descriptions
- DOIs for data
- Securely preserved for a minimum of 10 years **from last use**

Compliance
expected by 2015

Funders are making demands

- Public good
- Preservation

NERC Data Policy

This approach was approved in September 2015 and January 2016. The data will be available until the end of the new phase of the RCUK as part of the RCUK

11. All applications for NERC funding must include an outline Data Management Plan, which must identify which of the data sets being produced are considered to be of long-term value, based on the criteria in NERC's Data Value Classification. All funding application must also include the resources needed to implement the Data Management Plan.

12. The outline data management plan will be evaluated as part of the standard NERC grant assessment process. All successful applications will be required to produce a detailed data management plan in conjunction with the appropriate NERC data centre.



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Dissemination and Sharing of Research Results

NSF Data Sharing Policy

Investigators are expected to share with other researchers, at no more than incremental cost and within a reasonable time, the primary data, samples, physical collections and other supporting materials created or gathered in the course of work under NSF grants. Grantees are expected to encourage and facilitate such sharing. See [Award & Administration Guide \(AAG\) Chapter VI.D.4.](#)

NSF Data Management Plan Requirements



Proposals submitted or due on or after January 18, 2011, must include a supplementary document of no more than two pages labeled "Data Management Plan". This supplementary document should describe how the proposal will conform to NSF policy on the dissemination and sharing of research results. See [Grant Proposal Guide \(GPG\) Chapter II.C.2.j](#) for full policy implementation.

NSF-OCI TASK FORCE on Data and Visualization : Report

<http://www.nsf.gov/od/oci/taskforces/>



Some other funders that require DMPs or equivalent



Five common themes

1. Description of data to be collected / created
(i.e. content, type, format, volume...)
2. Standards / methodologies for data collection & management
3. Ethics and Intellectual Property
(highlight any restrictions on data sharing e.g. embargoes, confidentiality)
4. Plans for data sharing and access
(i.e. how, when, to whom)
5. Strategy for long-term preservation

UK EXPERIENCE

Regulatory requirements

- Data protection, freedom of information, research ethics – all apply to data in UK
- If data is badly managed:
 - Compliance is hard
- Know what you deleted (and why) as well as what you have kept
- Ensure consent forms allow for widest possible reuse
- Data management plans must deal with regulatory as well as funder requirements – true in all countries

Policy

General principles applying to all government-funded research

Data Policy

The Research Councils' remit and is undertaken to a coherent approach across the research...
 These RCUK common principles on data policy provide an overarching framework for individual Research Council policies on data policy.

Go

This website

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Principles

- Publicly funded research data are a public good, produced in the public interest, which should be made openly available and does not harm intellectual property.
- Institutional and professional standards and relevant standards should be preserved and enhanced.
- To enable research data to be used to their full potential, research data should be recorded and made openly available to enable other researchers to understand the research and re-use potential of the data. Published results should always include information on how to access the supporting data.
- RCUK recognises that there are legal, ethical and commercial constraints on release of research data. To ensure that the research process is not damaged by inappropriate release of data, research organisation policies and practices should ensure that these are considered at all stages in the research process.
- To ensure that research teams get appropriate recognition for the period of privileged use of the data they have collected to enable them to undertake further research. The length of this period varies by research discipline and is discussed further in the published policies of individual Research Councils.
- In order to recognise the intellectual contributions of researchers and to ensure that key research datasets, all users of research data should acknowledge the source and abide by the terms and conditions under which they are accessed.
- It is appropriate to use public funds to support the management and sharing of publicly-funded research data. To maximise the research benefit which can be gained from limited budgets, the mechanisms for these activities should be both efficient and cost-effective in the use of public funds.

Translated by different funding councils to suit their areas of research

Most place requirements on the researcher – one places requirements on the university

Result for UK policy

- Emergence of university policies alongside funder policies
- Partly to ensure compliance with funder requirements – partly for own interests
- Also roadmaps to demonstrate routes towards full compliance

UAS Home > Research Data Management >

- › Why manage your data?
- › Data Management Planning
- › Data Backup and Security
- › Data Sharing and Archive
- › Training, Advice & Support

University of Oxford commitment to research data management:



"The University of Oxford is committed to supporting researchers in appropriate curation and preservation of their research data, and where applicable in accordance with the research funders' requirements."

NB. Clicking on this link will take you out of the current site)

(Source: PRAC ICT Sub-committee)


Research Data Management

Good practice in data management is one of the core areas of research integrity, or the responsible conduct of research.

The following diagram provides further insight to some of the stages involved in research data management, and the facilities and services available to help, both within the University and from external providers.



Quick links

- › Data management planning checklist
- › Funder policies
- › Training, advice & support
- › 101 Flyer - 'Managing your research data at The University of Oxford'  (916kb)

Find out more

- › May 2011 - UK Data Archive - Managing and Sharing Data

What's new

- › EPSRC has launched a new Policy Framework on Research Data (with effect from 1 May 2011)
- › ESRC - April 2011 - Data Management Plans now compulsory
- › January 2011 - Wellcome Trust et al: Sharing research data to improve public health: joint statement of purpose (external link)

Institutional Policy

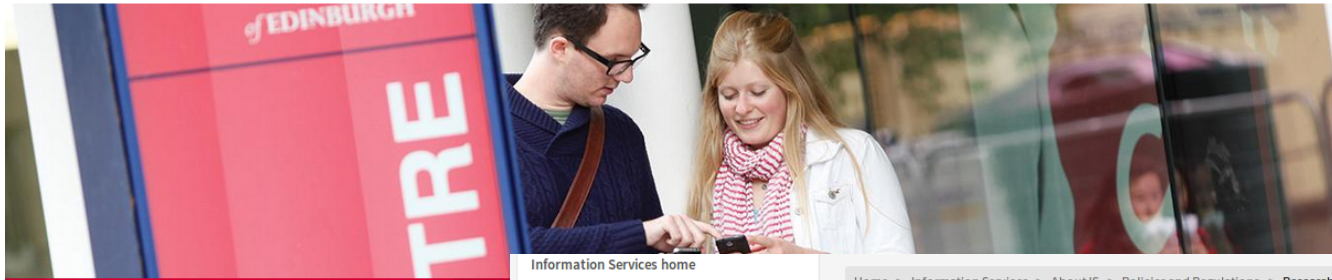
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Research Data Management Policy

This policy for managing research data was approved by the University Court on 16 May, 2011.

The University adopts the following policy on Research Data Management. It is acknowledged that this is an aspirational policy, and that implementation will take some years.

1. Research data will be managed to the highest standards throughout the research data lifecycle as part of the University's commitment to research excellence.
2. Responsibility for research data management through a sound research data management plan during any research project or programme lies primarily with Principal Investigators (PIs).
3. All new research proposals [from date of adoption] must include research data management plans or protocols that explicitly address data capture, management, integrity, confidentiality, retention, sharing and publication.
4. The University will provide training, support, advice and where appropriate guidelines and templates for the research data management and research data management plans.
5. The University will provide mechanisms and services for storage, backup, registration, deposit and retention of research data assets in support of current and future access, during and after completion of research projects.
6. Any data which is retained elsewhere, for example in an international data service or domain repository should be registered with the University.
7. Research data management plans must ensure that research data are available for access and re-use where appropriate and under appropriate safeguards.
8. The legitimate interests of the subjects of research data must be protected.
9. Research data of future historical interest, and all research data that represent records of the University, including data that substantiate research findings, will be offered and assessed for deposit and retention in an appropriate national or international data service or domain repository, or a University repository.
10. Exclusive rights to reuse or publish research data should not be handed over to commercial publishers or agents without retaining the rights to make the data openly available for re-use, unless this is a condition of funding.

Why have a University policy?

<http://www.ed.ac.uk/information-services/about/policies-and-regulations/research-data-policy>




Monash University Policy Bank

Research Data Management Policy

Institutional Policy

<p>Purpose</p>	<p>The purpose of this policy is to ensure that research data is stored, retained, made accessible for use and reuse, and/or disposed of, according to legal, statutory, ethical and funding bodies' requirements.</p>
<p>Scope</p>	<p>All Monash University staff, adjuncts, visitors and students engaged in research ('researchers') in all disciplines, irrespective of their location; and All research data, regardless of format, and subject to the provisions of any relevant contracts or funding/collaboration agreements</p>
<p>Policy Statement</p>	<p>Monash University acknowledges that research data management must be consistent with relevant legislation, codes and guidelines. This policy and its associated procedures first and foremost support its commitment to comply with the Australian Code for the Responsible Conduct of Research (2007) ('the Code'), 'Section 2: Management of Research Data and Primary Materials'. The Code states that all individuals and institutions engaged in research have a responsibility to manage research data well, by addressing ownership, storage and retention, and access, over and beyond the end of the research project.</p> <p>In addition to the Code, this policy is guided by the Monash University Information Management Principles. Monash University also supports the guidelines and initiatives designed to improve access to publicly funded research data, including the OECD Principles and Guidelines for Access to Research Data from Public Funding (2007).</p> <p>Monash University recognises significant value in the data generated by its large investment in research. Research data is valuable to researchers for the duration of their research and may have ongoing value. Durable research data is essential to justify, and defend when required, the outcomes of the research. Research data may also have value for other researchers or the wider community.</p>

Accessibility



because good research needs good data

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Policy and Legal

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Policy and Legal

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Policy resources

[Overview of Funders' Data Policies](#)

A table and short summaries comparing research funders' policies

[Funders' Data Policies](#)

Detailed overview of each funder's policy, stating requirement for data plans, expectations on data sharing and available support.

[Institutional Data Policies](#)

A table listing example of UK universities research data policies. Add your examples!

[Policy Tools and Guidance](#)

Annotated bibliography of: 1) tools and guidance for creating policies; 2) example policies; 3) publications; & 4) data management guidance.

[Preservation policy template](#)

Template to help repositories define preservation policies

[Data management plans & DMP Online](#)

Summary of what funders ask for in plans and the DCC's tool to help

<http://www.dcc.ac.uk/resources/policy-and-legal>

DCC Policy Summary

Policy summary from ANDS



Find research data:

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For Partner Institutions

Make Connections

Managing Data

Guides

Publishing Data

Licensing

Online Services

Content Providers Guide

Technical resources

News

Newsletter

Community Bulletin Board

Institutional policies and procedures

Institutional policies and procedures, which might include guidelines, protocols and standards, are fundamental to good research data management.

- support the [Australian Code for the Responsible Conduct of Research](#)
- be up to date
- address data-related issues (many institutions already have policies on the topics listed below but these may pre-date the latest version of the code)
- be widely publicised to all those who have a role in ensuring that research data is well managed, ie researchers, data managers
- include compliance measures.

In some instances, research institutions have sensibly opted to combine policies on topics which are related. In some cases, policies may not be consistent with, supportive of and supported by the institution's overall research data management policy.

Research data management

A number of ANDS guides deal with research data management policy.

- [Research Data Policy and the Australian Code for the Responsible Conduct of Research](#)
- [What is research data?](#)

The [Research Data Management Policy Outline](#) provides a list of elements which an institution may wish to consider when drawing up, or updating, its research data management policy. The following examples of research data management policies and procedures show different institutional approaches to the issue of research data management incorporated into the institutional policy on the [Australian Code for the Responsible Conduct of Research](#).

- Griffith University. [Code for the Responsible Conduct of Research](#) (Section 6: Management of Research Data and Primary Materials)
- James Cook University. [Code for the Responsible Conduct of Research.Part 2: Management of Research Data and Primary Materials](#).
- Queensland University of Technology. [Management of Research Data Policy](#)
- University of Melbourne. [Management of Research Data and Records \(Draft\)](#)
- University of New South Wales. [Research Code of Conduct. Section 8. Management of Research Material and Data](#).
- University of New South Wales. [Procedure for Handling Research Material and Data](#)
- University of Newcastle. [Research Data and Materials Management Policy](#)
- University of Newcastle. [Research Data and Materials Management Procedure](#)

DMP template for postgraduates

Defining your data

Looking after your data

Sharing your data

Archiving your data

Executing your plan



<http://opus.bath.ac.uk/30772>

UEL workbook for PGRs

Mixes sections to complete with DCC guidance on each topic

Now accompanied by template in DMPonline tool

Profiles support at UEL and they offer to review and provide feedback on researchers DMPs

UEL
University of
East London

Workbook for 'Writing a Data Management Plan' workshop

Writing a Data Management Plan workshop, 17 February 2014

12.00-14.00, ED.4.02, Stratford Campus, University of East London

Stephen Grace and David McElroy, Research Data Services

Researcher:
Email:
Project title:
Project duration:
Project description and context:

CC BY

Example templates from DMPonline

University of East London has two templates in DMPonline

POSTGRADUATE DMP

- Shorter – six sections
- Less formal wording
e.g. 'looking after your data'
- Straightforward guidance

STANDARD DMP

- 2 phases – lite and full DMP
- 6-8 sections overall
- Questions more formal / factual
- Guidance longer and more directive

Example answers

St Andrew's University has added example answers for every question in the EPSRC template

The screenshot displays a web interface for an 'Ethics and Legal Compliance' assessment. The header shows '2 questions, 0 answered'. The first question asks 'How will you manage any ethical issues?'. An example answer is provided: 'It is not envisaged that there will be any ethical or privacy issues with respect to the data as there is no personal data as defined by the Data Protection Act.' Below the answer is a rich text editor with icons for bold, italic, list, link, and table. A 'Save' button is visible. To the right, a 'Guidance' panel titled 'EPSRC Policy Expectations' explains that EPSRC recognizes legal, ethical, and commercial constraints on research data release and that these should be considered at all stages. Below this is a link to 'St Andrews guidance on Ethical Issues'. The second question asks 'How will you manage copyright and Intellectual Property Rights (IPR) issues?'. An example answer states: 'The research data from this project will be issued under an Attribution Non-commercial Share Alike (by-nc-sa) licence, meaning others can use, adapt and build upon our work non-commercially, as long as they credit us and license their new creations under the identical terms.' A similar 'Guidance' panel on the right lists 'EPSRC Policy Expectations' and 'St Andrews guidance on IPR Ownership and Licencing'.

Ethics and Legal Compliance (2 questions, 0 answered)

How will you manage any ethical issues?

Example of answer

It is not envisaged that there will be any ethical or privacy issues with respect to the data as there is no personal data as defined by the Data Protection Act.

B *I* [List] [List] [Link] [Table]

Save

Not answered yet

How will you manage copyright and Intellectual Property Rights (IPR) issues?

Example of answer

The research data from this project will be issued under an Attribution Non-commercial Share Alike (by-nc-sa) licence, meaning others can use, adapt and build upon our work non-commercially, as long as they credit us and license their new creations under the identical terms.

B *I* [List] [List] [Link] [Table]

Guidance **Share note**

EPSRC Policy Expectations

EPSRC recognises that there are legal, ethical and commercial constraints on release of research data. To ensure that the research process (including the collaborative research process) is not damaged by inappropriate release of data, research organisation policies and practices should ensure that these constraints are considered at all stages in the research process.

St Andrews guidance on Ethical Issues

Guidance **Share note**

EPSRC Policy Expectations

St Andrews guidance on IPR Ownership and Licencing

Suggested answers

The University of Glasgow has template answer for the policy question in the MRC template.

The table is prepopulated with links to all the University policies.

7. Relevant institutional, departmental or study policies on data sharing and data security	
<p>Please complete, where such policies are (i) relevant to your study, and (ii) are in the public domain, e.g. accessibly through the internet. Add any others that are relevant (check for local policies in your school or group)</p>	
Policy	URL or Reference
Data Management Policy & Procedures	Draft GU Research Data Management policy http://www.gla.ac.uk/media/media_232425_en.docx
Data Security Policy	IT Security Policies http://www.gla.ac.uk/services/it/informationsecurity/policies Confidential Data Policy http://www.gla.ac.uk/services/it/informationsecurity/confidentialdata Data security issues are also covered to some extent by the University's Data Protection policy http://www.gla.ac.uk/services/dpfoioffice/policiesandprocedures/dpa-policy Policy on Confidential Data in the University http://www.gla.ac.uk/media/media_180727_en.pdf
Data Sharing Policy	Data sharing is covered in the University's Code of Good Practice in Research http://www.gla.ac.uk/media/media_227599_en.pdf Data sharing is covered in a number of Ethics related policies. The policies are accessible via the Ethics Committee homepage http://www.gla.ac.uk/research/aims/ourpolicies/ethicshomepage
Institutional Information Policy	The University of Glasgow lists all policies relevant to research conduct and interaction with the wider community http://www.gla.ac.uk/research/aims/ourpolicies
Other:	Details on relevant RCUK policies and draft GU EPSRC roadmap available at http://www.gla.ac.uk/services/datamanagement/rdm-at-gu
Other	For links to the University research ethics policies and working with animals, please see: http://www.gla.ac.uk/research/aimsassessmentandpolicies/ourpolicies

TOOLS AND RESOURCES

Example plans

Example Data Management Plans

[Technical plan submitted to the AHRC](#) [PDF, 7 pages]

A DMP submitted by a researcher from the University of Bristol, also including comments from the reviewers

[Two social science DMPs](#) [PDF, 7 pages]

Example plans from researchers at the University of Leeds, shared as part of the Leeds RoaDMaP training materials

[Rural Economy & Land Use \(RELU\) programme examples](#) [webpage]

Two examples from a joint ESRC, BBSRC and NERC programme

[Health sciences DMP](#) [PDF, 11 pages]

Example DMP produced by the DATUM for Health RDM training project

[Psychology DMP](#) [PDF, 11 pages]

A very detailed, fictional psychology DMP produced by the DMTpsych RDM training project, based on a seminal psychology experiment

[UCSD Example Data Management Plans](#) [webpage]

Over 20 example plans submitted to the National Science Foundation (NSF) in the United States by academics at UC San Diego

[Colorado School of Mines examples](#) [webpage]

A variety of US example DMPs from Mines and elsewhere

[NSF data management plans](#) [webpage]

5 DMPs submitted to the NSF, shared by the DataOne initiative

[Biology and chemistry DMPs](#) [webpage]

Three example DMPs from the USA shared by NECDMC, an instructional tool for teaching RDM to undergraduates, graduate students, and researchers in the health sciences, sciences and engineering.

- <https://dmponline.dcc.ac.uk/help#PlanningHelp>

What data to keep

Roles and Responsibilities

A Digital Curation Centre and Australian National Data Service 'working level' guide



How to Appraise & Select Research Data for Curation

Angus Whyte (DCC) and Andrew Wilson (ANDS)

Researcher ('data creator')

- Provide enough information for others to assess the research data's scientific and scholarly quality and compliance with disciplinary or ethical norms.
- Provide relevant information for the repository to identify who will use the data and how i.e. the 'designated community', and any specific access requirements or constraints.
- Provide the research data in formats recommended by the data repository.
- Provide the metadata requested by the repository.

Data centre or repository

- Make explicit its mission in the area of digital archiving, and its selection policy for digital objects.
- Ensure compliance with legal regulations and contracts.
- Ensure the authenticity and integrity of the digital objects and the metadata.
- Assume responsibility from the data producer for ensuring the digital objects are accessible and available to a defined 'designated community'.
- Plan for long-term preservation of the digital assets.

How to Cite Datasets and Link to Publications

Alex Ball (DCC) and Monica Duke (DCC)



Digital Curation Centre, 2011.
Licensed under Creative Commons Attribution 2.5 Scotland:
<http://creativecommons.org/licenses/by/2.5/scotland/>

How to Develop a Data Management and Sharing Plan

Sarah Jones (DCC)



Digital Curation Centre, 2011.
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<https://creativecommons.org/licenses/by/2.5/scotland/>

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Metadata Standards

AgMES - Agricultural Metadata Element Set

A semantic standard for description, resource discovery, interoperability and data exchange for different types of agricultural information resources.

CF (Climate and Forecast) Metadata Conventions

A standard for climate and forecast "use metadata" that aims both to distinguish quantities (such as physical description, units, or prior processing) and to locate the data in space-time.

DIF - Directory Interchange Format

An early metadata initiative from the Earth sciences community, intended for the description of scientific

Curation training



Looking to develop your data management and curation skills? Learning is easy when you sign up for any of our introductions to digital curation, which cover all those activities you need to consider when planning and implementing new projects.

[Read more](#)



Data Management Plans and DMPonline

Why is the tool needed and what does it do?

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
- SAML (Shibboleth) authentication for single sign-on

Creating an account

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 

Sign up 

New to DMPonline? Sign up today.

sarah.jones@glasgow.ac.uk

Organisation

glas

[Glasgow Caledonian University](#)

[Glasgow School Of Art](#)

[University Of Glasgow](#)

Asks for email,
organisation and
password

Auto-fills uni
options as you
type

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The DCC is funded by

Jisc

Creating a plan

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. [Not applicable/not listed.](#)
Otherwise leave blank.

To see institutional questions and/or guidance, select your organisation. [Not applicable/not listed.](#)
You may leave blank or select a different organisation to your own.

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

DCC guidance

Click to write a generic DMP

Or choose your funder to get their specific template

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

Choose any additional optional guidance

Tailoring at multiple levels

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.

Medical Research Council

To see institutional questions and/or guidance, select your university?

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

University Of Glasgow

Unit

Humanities Advanced Technology and
Information Institute

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

Digital Curation Centre

Create plan

Options to have questions
and guidance at institutional
and 'unit' level

Summary of what's in a plan

This plan is based on:

Funder | Economic and Social Research Council

[Answer questions](#)

[Export](#)

The ESRC requires that all applicants seeking ESRC funding include a statement on data sharing in the relevant section of the Je-S application form. If data sharing is not possible, the applicant must present a strong argument to justify their case.

Sections	Questions
Existing data	<ul style="list-style-type: none">- An explanation of the existing data sources that will be used by the research project (with references)- An analysis of the gaps identified between the currently available and required data for the research
Information on the data that will be produced	<ul style="list-style-type: none">- Methodologies for data collection- Data volume and data type, e.g. qualitative or quantitative data- Data quality, formats, standards documentation and metadata
Planned quality assurance and back-up procedures (security/storage)	<ul style="list-style-type: none">- Quality Assurance- Back-Up
Management and archiving of collected data	<ul style="list-style-type: none">- Plans for management and archiving of collected data
Overcoming data sharing difficulties	<ul style="list-style-type: none">- Expected difficulties in data sharing, along with causes and possible measures to overcome these difficulties.
Consent, confidentiality, anonymisation and other ethical considerations	<ul style="list-style-type: none">- Explicit mention of consent, confidentiality, anonymisation and other ethical considerations
Copyright and intellectual property ownership of the data	<ul style="list-style-type: none">- Copyright and intellectual property ownership of the data
Responsibilities for data management and curation	<ul style="list-style-type: none">- Responsibilities for data management and curation within research teams at all participating institutions

Answering questions

The screenshot shows a web interface for a project titled "My project (DCC Template)". At the top right, a progress bar indicates "1/13" questions. Below the title are tabs for "Plan details", "Generic DMP", "Share", and "Export". The main content area is divided into sections: "Data Collection (2 questions, 0 answered)" and "Documentation and Metadata (1 question, 1 answered)". The "Documentation and Metadata" section is expanded to show a question: "What documentation and metadata will accompany the data?". Below the question is a rich text editor with a toolbar and the text: "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." To the right of the question is a "DCC Guidance" box containing "Questions to consider" and "Guidance" text. At the bottom left of the question area is a "Save" button and a notification: "Answered less than a minute ago by Sarah Jones". A green callout box is overlaid on the screenshot, containing the text: "Notes who has answered the question and when" and "Progress bar updates how many questions remain".

Notes who has answered the question and when

Progress bar updates how many questions remain

Co-writing DMPs

The screenshot shows the DMP ONLINE interface. At the top left is the logo 'DMP ONLINE'. 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 indicator '1/13'. There are three tabs: 'Plan details', 'Generic DMP', and 'Export'. The 'Generic DMP' tab is active. Below the tabs are several expandable sections: 'Data Collection (2 questions, 0 answered)', 'Documentation and Metadata (1 question, 1 answered)', '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)', and 'Responsibilities and Resources (2 questions, 0 answered)'. The 'Documentation and Metadata' section is expanded and contains a yellow warning box: 'This section is locked for editing by Sarah Jones.' Below the warning box is the question: 'What documentation and metadata will accompany the data?' and the 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.' Below the answer is a timestamp: 'Answered 7 minutes ago by Sarah Jones'. At the bottom right of the page is an 'Export' button.

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 <input checked="" type="checkbox"/>	Sections <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Project Name	Data management procedures <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Project Identifier	Data management procedures to be followed during the lifetim... <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Grant Title	Existing datasets <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Principal Investigator / Researcher	Existing datasets to be used by the grant or fellowship <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Project Data Contact	New datasets <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Description	Datasets likely to be created by the grant or fellowship which wi... <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Funder	
<input checked="" type="checkbox"/> Institution	

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* [List] [List] [Link] [Table]

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

B *I* Paragraph ▾ ☰ ☷ ☲ ▾

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

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	View Edit Preview
Outline for application (version 2)	true	30-05-2014	24-07-2014	View Edit Preview

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

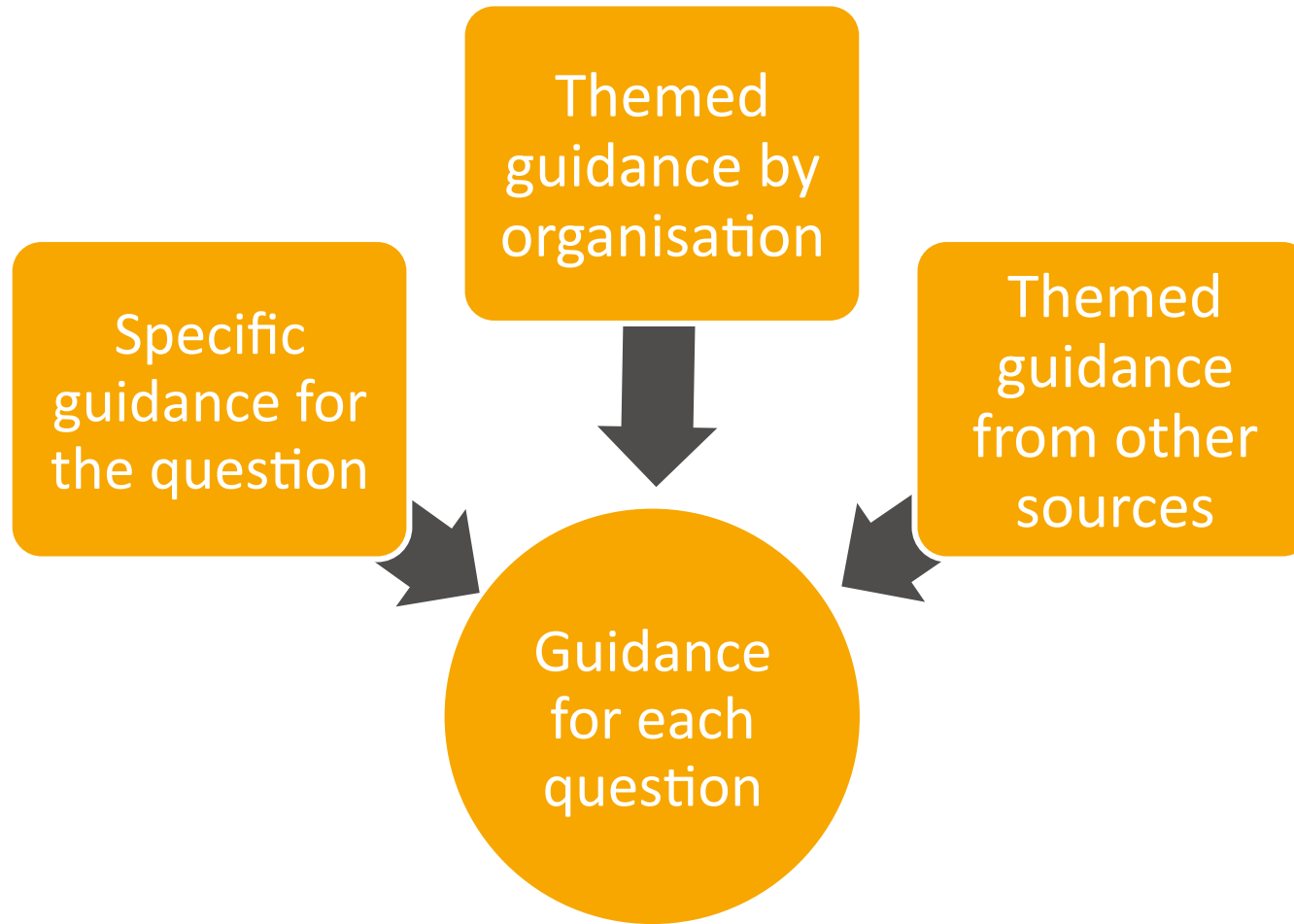
Save Not answered yet

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.

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

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

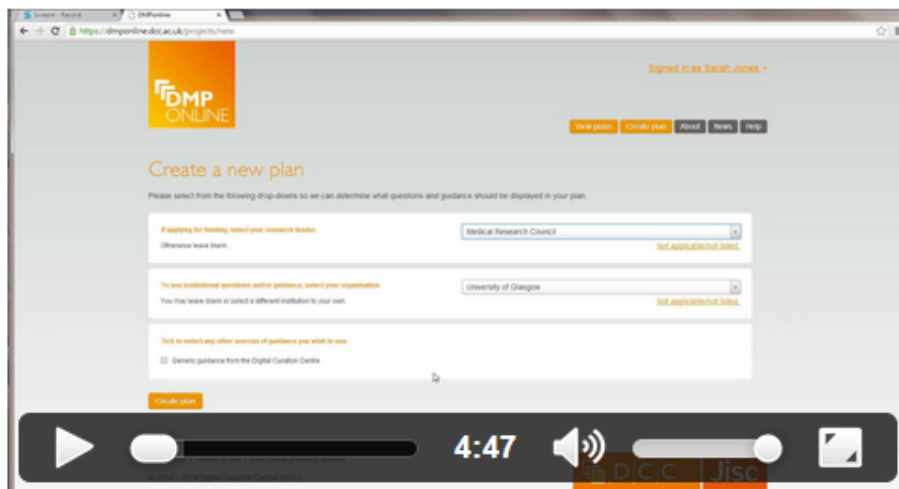
Create plan

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



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



DMP guidance, tools & resources:
www.dcc.ac.uk/resources/data-management-plans



DCC

because good research needs good data