

# DMPTool Quick Start Guide

[PDF version]

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## 1. Who can use the tool?

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DMPTool is free for anyone to create data management plans.

- If you are a researcher from one of the [partner institutions](#), you can log in using your institutional credentials. By being affiliated with your institution, you may be presented with institution-specific guidance (displayed as section-specific instructions and/or resource web links) to help you complete your plan.
- If your institution is not a partner, you can create your own account by selecting “Not in List” as your institution upon login.

## 2. How do I log in?

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Click on Log In in at the top-right of the home page. You can also click the green “Get Started” button.

- If your institution is listed:
  - On the Login page, select your institution from the list.
  - Click Next
  - Researchers at some institutions will be presented with the institution's authentication page. Log in as you usually do for your institution's web services.
- If your institution is not listed:
  - If your institution is not listed, select "Not in List".
  - Click Next
  - If you have already created an account with DMPTool, enter the username and password you previously chose and click Login. Once logged in, use My Profile in the menu bar to manage your password and other information.
  - If this is your first time logging in, click “Create an Account”.

### 3. Overview of tool features

The screenshot shows the Dmptool interface. At the top, there are four navigation tabs: 'My Dashboard' (labeled 1), 'My DMPs' (labeled 2), 'Create New DMP' (labeled 3), and 'My Profile' (labeled 4). Below these tabs is a section titled 'MY DMPs' (labeled 5). This section includes a summary bar with filters: 'All (7) | Owned (4) | Co-owned (3) | Approved (0) | Submitted (0) | Completed (1) | Rejected (0)'. Below the summary bar is a table with the following columns: Name, Owner, Status, Visibility, and Last Modification Date. The table contains four rows of data:

Name	Owner	Status	Visibility	Last Modification Date
Copy of Gordon and Betty Grant	Rosalie Lack	New		04/19/2014 12:24AM
Future of DMPs grant	Rosalie Lack	New		04/18/2014 09:45PM
GBMF plan	Perry Willett	New		04/20/2012 06:51PM
genome title	Instadmin123 Admin	New		04/30/2014 06:36PM

1. My Dashboard is your best starting point for managing your DMPs. From here you can get an overview of all your DMPs.

2. My DMPs lists of all your DMPs, noting which you own, co-own, and their status.

3. Create New DMP allows you to start from a template or you can copy an existing DMP.

4. My Profile is where you can update your personal information, including your [ORCID](#). You can also modify your notification preferences. A check mark (✓) in front of a preference indicates you would like to be sent a notification.

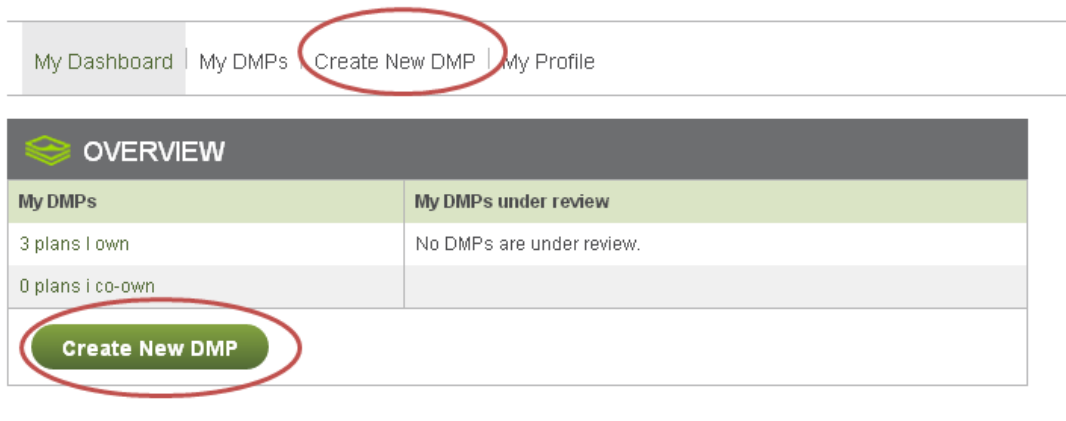
#### 5. DMP States/Status

- New. You have created your DMP, but have not Completed it.
- Owned. DMPs that you have created.
- Co-owned. DMPs for which others have designed you as a co-owner.
- Completed. After clicking “Done” on the “DMP Preview” screen, your plan is marked as ‘Completed’.

The following states only apply if your institution has enabled the “Review” functionality. Contact your institutional administrator for more information. (The email address and a URL for help are at the top of the page after you log in.)

- Submitted. Your DMP has been submitted for review to your institutional administrator.
- Approved. Your DMP has been approved by your institutional administrator.
- Rejected. Your DMP has been rejected by your institutional administrator.

## 4. How do I create a DMP?



After logging in, you will be taken to your My Dashboard page, click the Create New DMP button below the “Overview” box or in the navigation bar next to My DMPs.

There are four steps in the workflow for creating a DMP:

Step #1: DMP Overview: provide general information about the plan, including template name, DMP title, co-owners, etc.

Step #2: DMP Details: provide answers to prompts in your DMP. Click the box size links to fully display section instructions.

Step #3: DMP Preview & Completion: preview the DMP with options to print and download; plan is designated as “Completed”.

## Step #1: DMP Overview

You can either: (A) Create a new DMP using a DMP Template; or (B) Copy an existing DMP.

My Dashboard | My DMPs | Create New DMP | My Profile

### CREATE NEW DMP

**A Start from a DMP Template**

Select a template based on funder guidances and provide responses to those requirements.

Select Template >>

**B Copy an Existing DMP**

Select an existing DMP below and amend the requirement responses.

	Name	Owner
<input type="radio"/>	Future of DMPs grant	Rosalie Lack
<input type="radio"/>	Gorden and Betty Grant	Rosalie Lack
<input type="radio"/>	Copy of Gorden and Betty Grant	Rosalie Lack
<input type="radio"/>	test 1.0	Admin123 UCOP Admin
<input checked="" type="radio"/>	test 1.1	Admin123 UCOP Admin

1 2 Next > Last >>

Copy this DMP >>

### (A) Start from a DMP Template

1. Click the “Select Template” button.
2. Either browse by or search for a template plan name.

**Note:** In the A-Z browse list, the folder icons and arrows to the left are clickable to view all templates within the folder.

**Note:** These templates include those that are customized by your institution.

3. Select the template appropriate for your funder or institution and click “Next”.

My Dashboard | My DMPs | Create New DMP | My Profile

### SELECT DMP TEMPLATE

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

A - F

G - L

M - S

T - Z

All

- ☐ Genome Canada
- ☐ Gordon and Betty Moore Foundation
- ☐ Gulf of Mexico Research Initiative
- ☐ Institute of Education Sciences (US Dept of Education)
- ☐ Institute of Museum and Library Services
- ☐ Joint Fire Science Program
- ☐ National Institutes of Health
- ☐ National Oceanic and Atmospheric Administration
- ☒ National Science Foundation
- ☐ NEH-ODH: Office of Digital Humanities
- ☐ Smithsonian Institution Digital Asset Management Plan (DAMP)
- ☒ US Geological Survey
  - ☐ US Geological Survey: Summary 1
  - ☐ US Geological Survey: Summary 2
  - ☐ USGS National Climate Change and Wildlife Science Center (NCCWSC)

### (B) Copy an Existing DMP

The list of existing DMPs includes those that you own or co-own as well as those that are visible to everyone at your institution or are publicly available. Select a DMP and click “Copy this DMP”.

After completing (A) or (B), enter the relevant information on the DMP Overview page.

My Dashboard | My DMPs | Create New DMP | My Profile

DMP Overview

**DMP OVERVIEW**

DMP Overview

DMP Template: IMLS II (2014-): New Software Tools or Applications

1 \* DMP Title

2 Proposal Solicitation Number

3 Proposal Submission Deadline

4 Visibility: ☐ public, ☐ institutional, ☐ private, ☐ test or practice

5 Add Co-owners: Add co-owners; search by name or email address

<< Back | Cancel | Save and Next >>

Enter the following information:

1. DMP Title. The name should help you identify this specific data management plan and will be listed on the “My DMPs” page. Often DMP titles are similar to project titles.
2. Proposal Solicitation Number (optional). Enter the funder solicitation number, if available. This information does not appear in your final DMP.
3. Proposal Submission Deadline (optional). Enter the grant submission deadline.
4. Visibility. Indicate your preference for DMP visibility. You can choose from the following options: "public" - viewable by everyone; "institutional" - viewable by everyone from your institution; "private" - "viewable by you and your plan co-owners; "test" - viewable by you and your plan co-owners.
5. Add Co-owners (optional). Designate DMP co-owner(s), who will be able to view, edit, and comment on your plan. They must already have a DMPTool account to be designated a co-owner.

Click “Save and Next”.

## Step #2. DMP Details

[illegible]

1. **Template Outline.** You can navigate among different sections of a template using this outline. As you click a section title in the outline on the left, the prompts, resources, and text box for your answers will appear on the right.
2. **Instructions.** There is Guidance for each section of the DMP. There may also be a Links tab where you will find links to further information, a Suggested Response tab with answers that you can simply copy and paste (not shown), and/or Example Response tab to help guide you in writing your response (not shown).
3. **Funder or Institution requirement statement.** These are instructions directly from the funder or institution that is requiring the DMP.
4. **Text box.** Your answers go here. The text box offers a few editing features (located above the text entry box).
5. **Save Response.** Click “Save Response” to save your response and remain in the current section. Click the “Save and Next” button to navigate to the next section in your DMP.

To navigate to other sections of your DMP, use the section links in the Outline in the box on the left. Be sure to save your response before leaving a section.

## Step #3. DMP Preview & Completion

The left screenshot shows the 'DMP DETAILS' page for the 'Institute of Education Sciences (US Dept of Education)'. It includes a sidebar with a 'Template Outline' and a main content area with a 'DMP Preview >>' button highlighted with a red circle and the number 1. The right screenshot shows the 'DMP PREVIEW' page, which displays the DMP content. It includes buttons for 'Export as PDF', 'Export as RTF', and 'Print', with 'Export as PDF' highlighted with a red circle and the number 3. The 'Done' button at the bottom right is highlighted with a red circle and the number 2. A red arrow points from the 'DMP Preview >>' button to the 'DMP PREVIEW' page.

1. DMP Preview button opens a new window and displays the contents of your entire DMP. You can click this at anytime to preview your plan. Be sure to click “Save Response” before clicking DMP Preview.
2. DMP Preview displays your entire DMP, including section headers and your responses.
3. Export or Print your plan as PDF or DOCX format, or print your plan.
4. While in DMP Preview, you must click “Done” to change your DMP status to ‘Completed’. If your organization has set up a “Review” process, you will instead see a "Request Feedback" button. Note: you can always come back and change or add information by clicking on DMP Overview or DMP Details in the navigation.

The screenshot shows the 'DMP PREVIEW' page. At the top, there are navigation tabs: 'DMP Overview', 'DMP Details', and 'DMP Preview'. Below the tabs, there are buttons for 'Export as PDF', 'Export as RTF', and 'Print'. The main content area displays the DMP information, including the 'DMP Template', 'Institution', 'DMP Name', 'Solicitation Number', and 'Submission Deadline'. Below this, there are four sections: '1. Data description', '2. Data management', '3. Data sharing', and '4. test sample 1'. Each section has a '[No response]' label. At the bottom, there is a 'Change Settings' button and a 'Done' button, which is highlighted with a red circle. A 'Back' button is also visible at the bottom left.

## 5. Sharing your plan publicly

We encourage DMPTool users to make their DMPs publicly available. This promotes open science and may help others in the community better craft their own DMPs. When creating a new plan you must select a visibility setting. To change this setting at any time, go to My DMPs, put your cursor over the plan, and click "Share." You can share your plan with everyone at your institution, publicly on the DMPTool website, or keep it private.

You can also go to the DMP Overview page and click Change Status next to Visibility.

My Dashboard | My DMPs | Create New DMP | My Profile

MY DMPS

All (8) | Owned (7) | Co-owned (1) | Approved (0) | Submitted (1) | Committed (1) | Rejected (0)

Name	Owner	Status	Visibility	Last Modification Date
Copy of E. affinis populations	Instadmin123 Admin	Submitted		04/10/2014 01:00AM
Copy of IES plan test Overview   Details   <b>Share</b>   Copy Export as PDF   Export as RTF   Delete	Rosalie Lack	Committed		04/19/2014 12:10AM
Copy of Moore Foundation grant	Rosalie Lack	New		04/18/2014 10:18PM
Copy of NIH grant DMP	Rosalie Lack	New		04/18/2014 09:58PM
Copy of NIH grant DMP	Rosalie Lack	New		04/18/2014 10:17PM

View All

1 2 Next > Last »

## 6. How do I get help from someone at my institution?

After logging in, you will find an email address and URL for help at the top of the page.

Welcome! Rosalie Lack

[Home](#) [My Dashboard](#) [DMP Requirements](#) [Public DMPs](#) [News](#) [Help](#) [Contact Us](#) [About](#) [Log Out](#)

UCOP

University of California, Office of the President

<http://www.cdlib.org/uc3/dmp>  
 Contact CDLUC3

My Dashboard

My DMPs

Create New DMP

My Profile

**OVERVIEW**

My DMPs	My DMPs under Review (where applicable)
5 plans I own	No DMPs are under review.
0 plans I co-own	

Create New DMP