



# Planning for (personal) data management with DMPonline.be

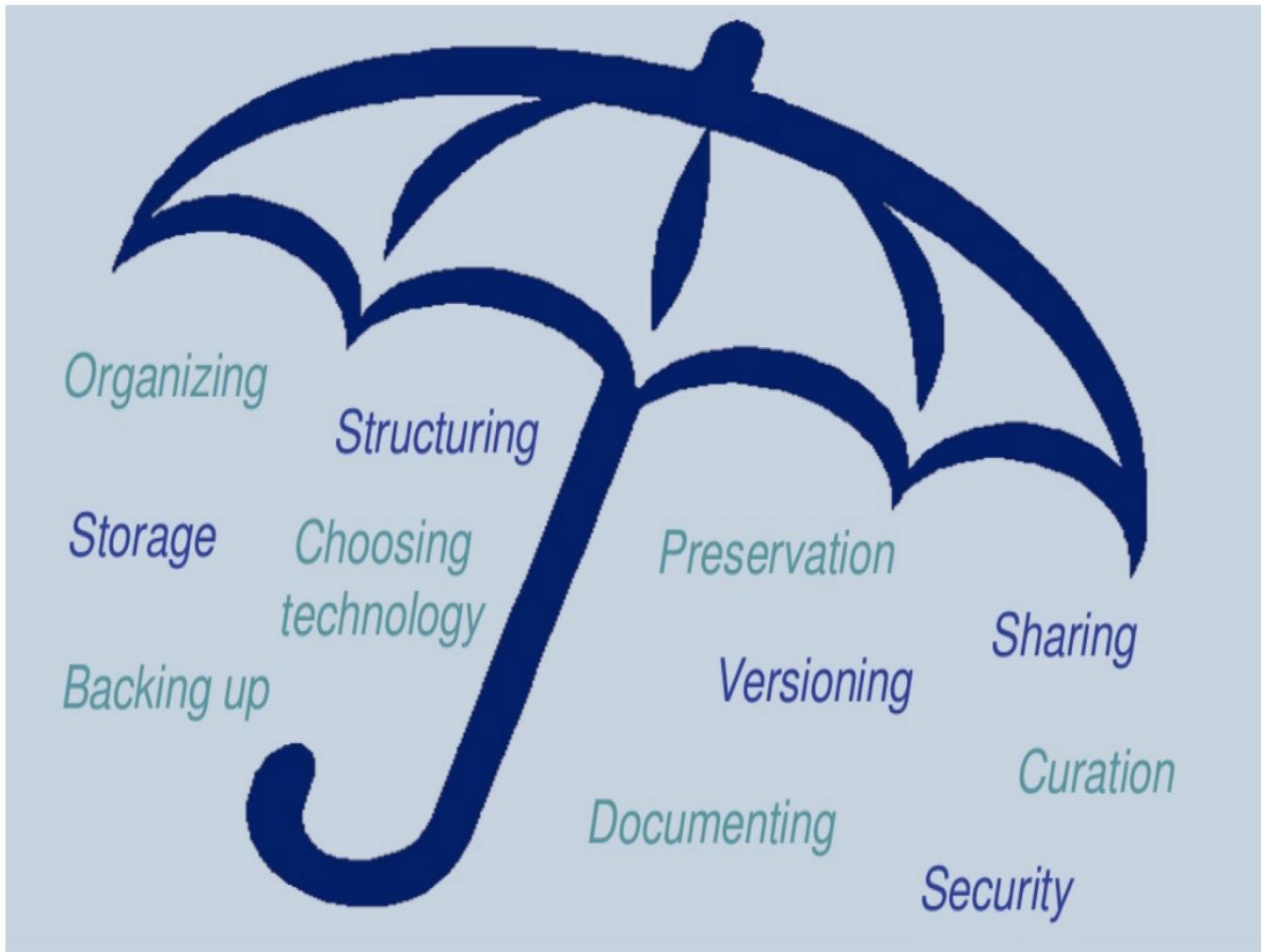
Myriam Mertens | FLAMES Annual Meeting, 27 April 2018



Cor

# Contemporary research requires a range of data-related skills





This includes  
Research Data  
Management

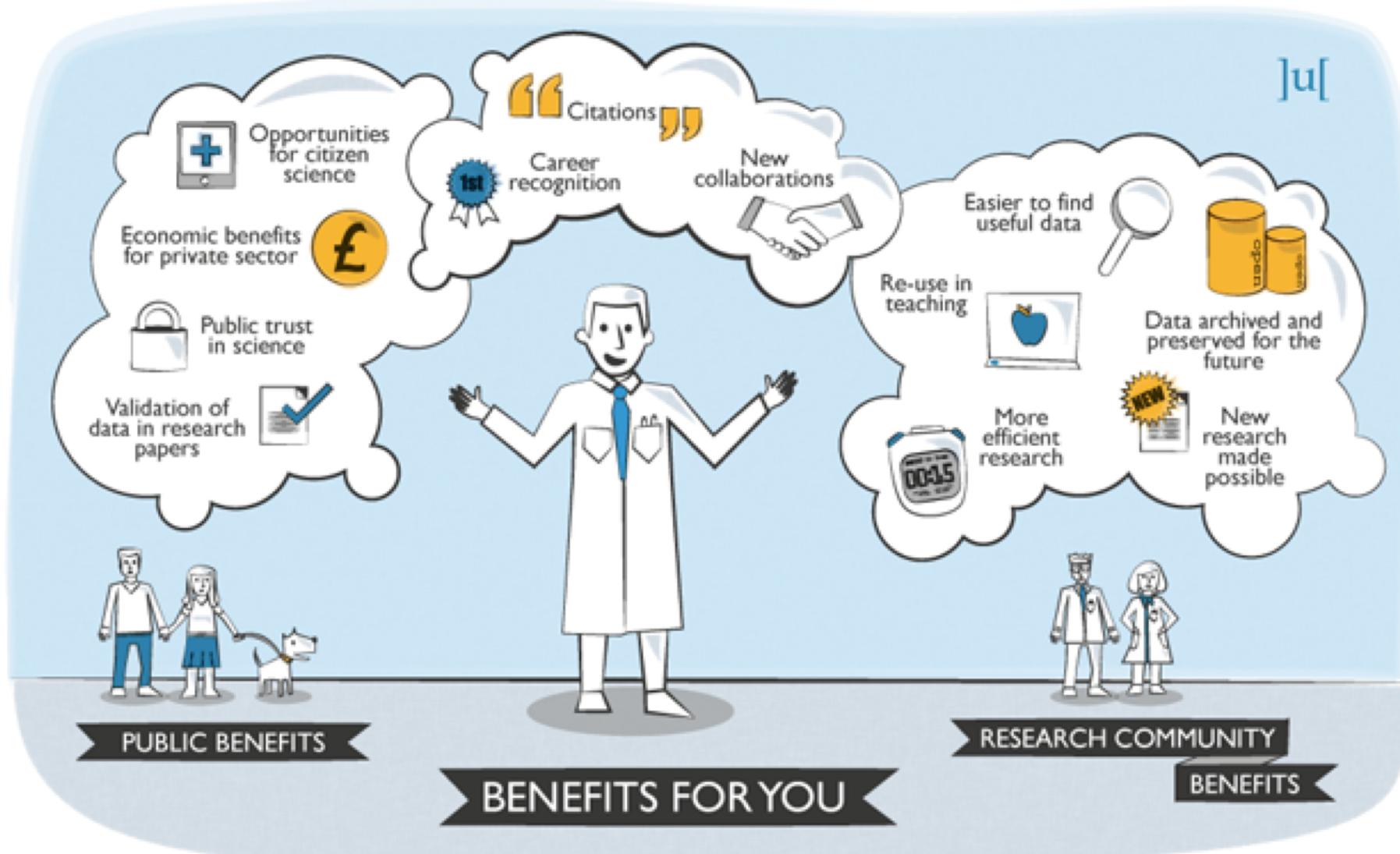
*[...] the compilation of many small practices that make your data **easier to understand, less likely to be lost, and more likely to be usable** during a project or ten years later.”*

(Briney 2015)

# External factors increasing urgency of RDM

- Ethical & legal obligations (e.g. GDPR!)
- Funder data preservation/sharing mandates
- Journal data availability policies
- Changing scientific norms (integrity & transparency, FAIR data...)





# Data protection vs. data sharing?

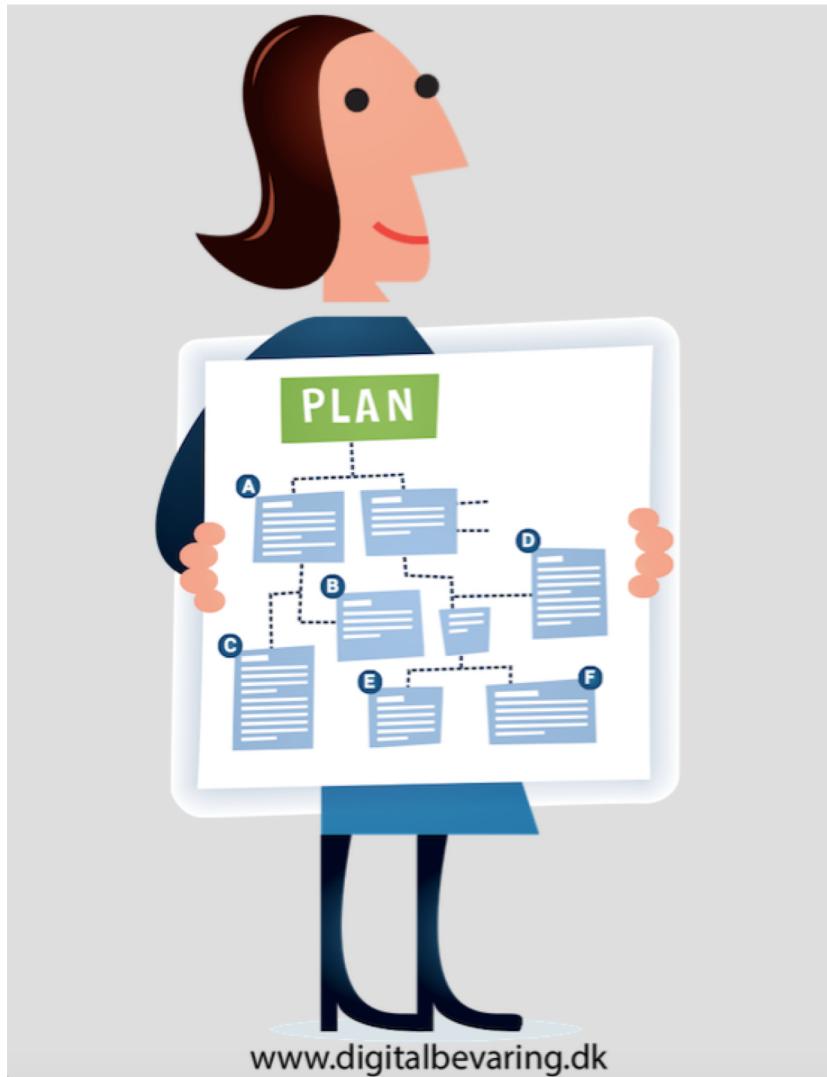


- Access to data **as open as possible, as closed as necessary**

*[...] sharing personal data can often be accomplished by using a combination of obtaining **informed consent, data anonymisation and regulating data access.**"*

(CESSDA ERIC, [Expert Tour Guide on Data Management](#))

**How to navigate these various demands & maximise benefits of RDM?**



## Plan everything beforehand: create a Data Management Plan

- ✓ Outlines how data are handled during & after a project
- ✓ ‘Living’ document
- ✓ Increasingly required by (inter)national research funders/institutions

# A DMP helps you to

- Think ahead about all aspects of RDM, so you save time & problems later on
- Identify resources & expertise required
- Improve accountability (key GDPR principle!)



# Common DMP topics

*“[...] plans typically state **what data** will be created and **how**, and outline the **plans for sharing** and **preservation**, noting what is appropriate given the nature of the data and any **restrictions** that may need to be applied.” ([DCC website](#))*

1. Description of data to be collected  
(content, type, format, volume...)
2. Methodologies, standards for collecting & documenting data
3. Ethical & legal issues  
(informed consent, anonymisation, confidentiality, IP, ...)
4. Storage & backup  
(incl. data security)
5. Plans for data sharing & access  
(how, when, with whom, under what conditions...)
6. Strategy for long-term preservation  
(what to keep, for how long, where...)

Also see: <http://www.dcc.ac.uk/resources/how-guides/develop-data-plan>

# Online planning tool: [DMPonline.be](#)

- Supports researchers to draft a DMP
- Includes DMP **templates** and **guidance** (e.g. funder/institutional)
  - raise awareness of RDM issues
  - explain key concepts
  - point to (local) support & resources

# Local instance of open source software

- Software initially developed by [DCC](#) (UK)
- Shared tool for **DMPbelgium consortium** institutions
  - 7 founding members; 5 new members joining in 2018
  - hosted on BELNET servers



Universiteit  
Antwerpen



VRIJE  
UNIVERSITEIT  
BRUSSEL



INSTITUUT  
NATUUR- EN  
BOSONDERZOEK



# How the tool works

- Go to <https://dmponline.be>, and sign in with institutional credentials or ORCID
- Create, view, edit, share, export & delete plans
- For guidance, visit the [help page](#)

The screenshot shows the DMP Online platform interface for a 'Horizon 2020 FAIR DMP' project. At the top, a progress indicator shows '1/34 questions answered' and 'approx. 25% of available space used'. Below this, the main content area is organized into sections:

- Section:** A section header with a '+' icon.
- Question:** A question card with a text input area and a 'Save' button.
- Write down your answer here:** A placeholder text within the question card.
- Leave a comment for collaborators:** A comment section with a 'Guidance' tab and an 'Add comment' button.
- Custom guidance from funder, university, group...:** A block of text providing specific guidance for the project.

The interface includes standard navigation buttons like 'Plan details', 'Horizon 2020 FAIR DMP', 'Share', and 'Export' at the top left.

# DMPs – A mere administrative burden?

- Positive feedback from researchers
- But sometimes perceived as yet another form to complete (cf. funder/institutional requirements)

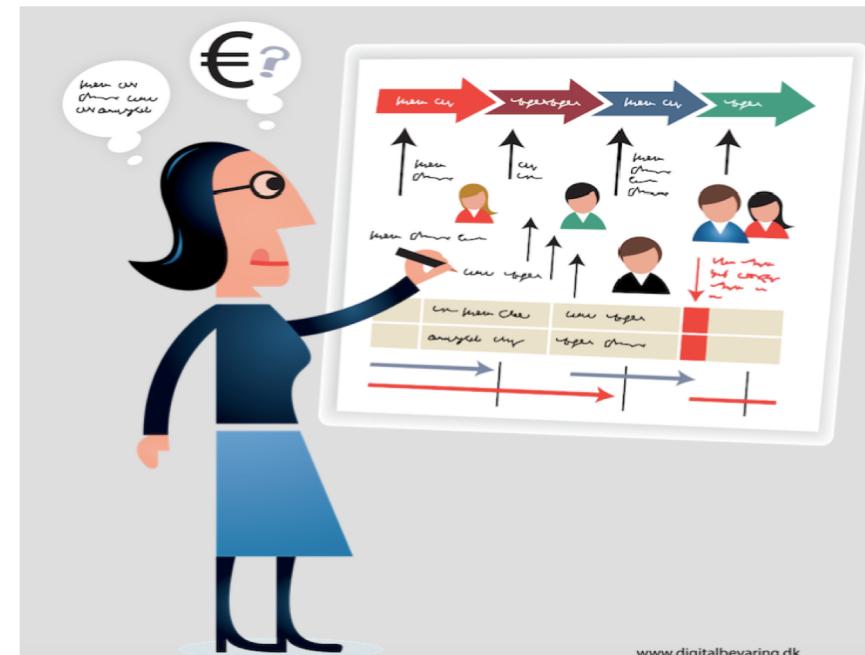
*“[The RDM session] put my research in the right direction: [...] by focusing on the **importance of a well thought-out Data Management Plan**. How trivial it may seem, I now get that it’s quintessential to understand the type of data you’re working with and to envision how every action will influence the next.”*  
*(UGent PhD student)*

# International efforts to improve DMP experience & quality

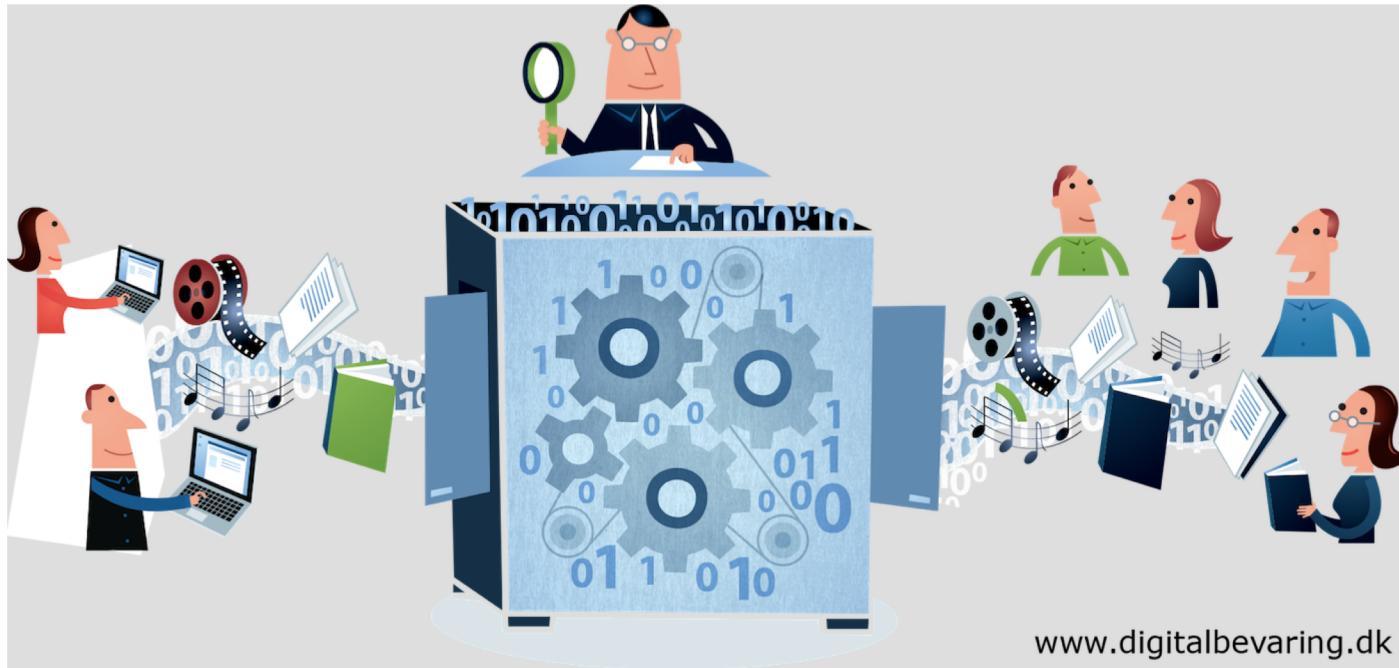
- Work in progress on “[Active DMPs](#)” (RDA)
  - DMPs as integral part of research process
  - embedding DMPs in existing workflows
  - exchanging information across research tools & systems
- Work in progress on [harmonization & more domain-oriented approaches](#) (Science Europe)
  - set of common core requirements for DMPs across funders/institutions
  - active encouragement of scientific communities to develop domain data protocols (basis for individual project's DMP)

# In sum, DMPs & DMP tools

- Improve understanding of RDM & issues involved
- Facilitate working with data
- Help you comply with external requirements
- Are evolving to simplify planning & add value for all stakeholders in future



# Thank you for listening!



Any questions? Contact us at [info@dmponline.be](mailto:info@dmponline.be)

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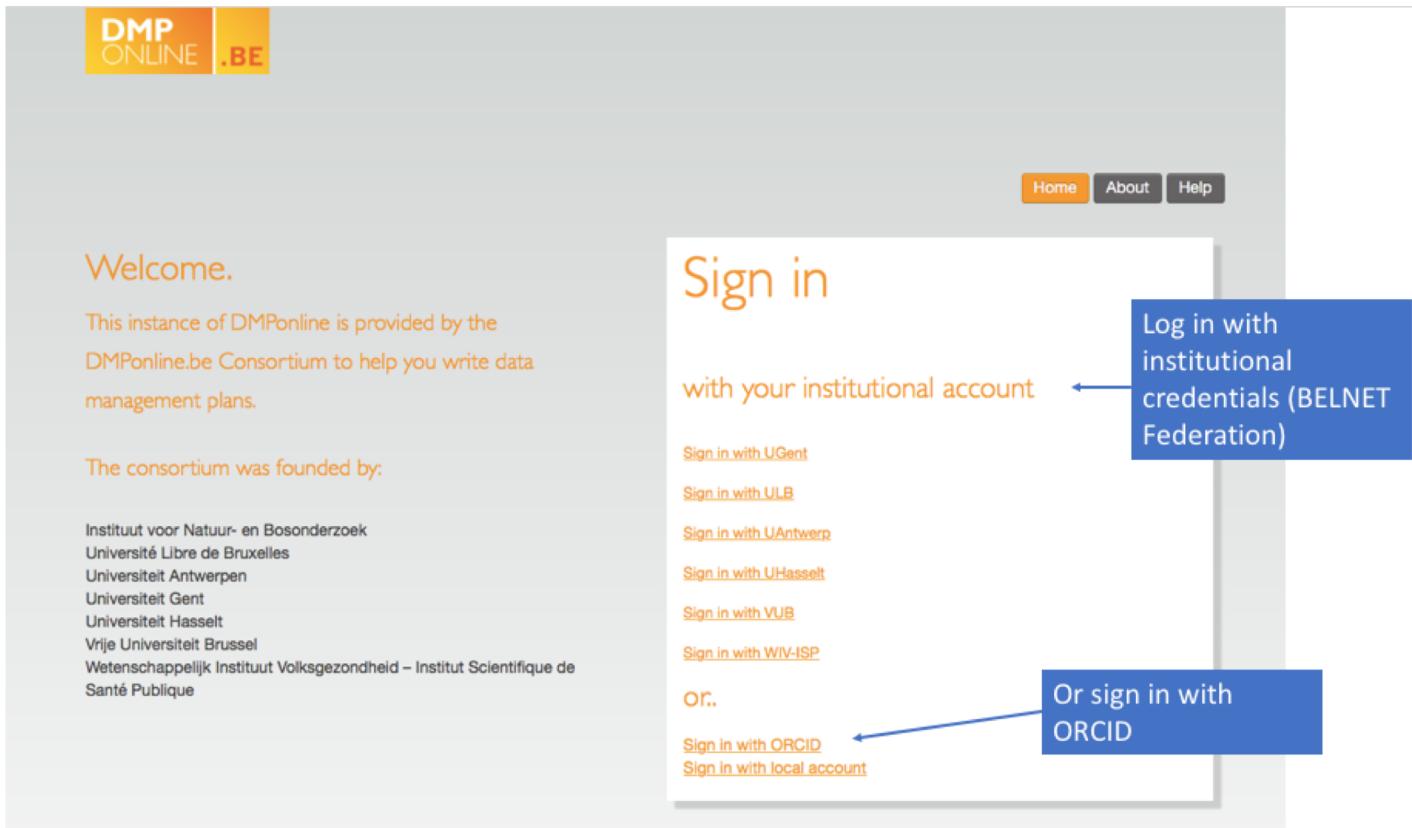
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# DMPonline.be

How the tool works



# Signing in



The screenshot shows the sign-in page of the DMponline.be website. At the top left is the logo "DMP ONLINE .BE". At the top right are three buttons: "Home" (orange), "About" (grey), and "Help" (grey). Below the logo, the text "Welcome." is displayed in orange. A paragraph in orange text states: "This instance of DMponline is provided by the DMponline.be Consortium to help you write data management plans." Below this, another orange text block says: "The consortium was founded by:" followed by a list of member institutions: Instituut voor Natuur- en Bosonderzoek, Université Libre de Bruxelles, Universiteit Antwerpen, Universiteit Gent, Universiteit Hasselt, Vrije Universiteit Brussel, and Wetenschappelijk Instituut Volksgezondheid – Institut Scientifique de Santé Publique. To the right, a large blue box contains the text "Log in with institutional credentials (BELNET Federation)" with an arrow pointing to it from the "with your institutional account" text above. Another blue box at the bottom right contains the text "Or sign in with ORCID" with an arrow pointing to it from the "Sign in with ORCID" link below.

Welcome.

This instance of DMponline is provided by the DMponline.be Consortium to help you write data management plans.

The consortium was founded by:

Instituut voor Natuur- en Bosonderzoek  
Université Libre de Bruxelles  
Universiteit Antwerpen  
Universiteit Gent  
Universiteit Hasselt  
Vrije Universiteit Brussel  
Wetenschappelijk Instituut Volksgezondheid – Institut Scientifique de Santé Publique

Sign in with your institutional account

Log in with institutional credentials (BELNET Federation)

Sign in with UGent  
Sign in with ULB  
Sign in with UAntwerp  
Sign in with UHasselt  
Sign in with VUB  
Sign in with WIV-ISP

or.

Sign in with ORCID  
Sign in with local account

Or sign in with ORCID

<https://dmponline.be>

# Connecting with ORCID

The screenshot shows the DMP Online profile edit page for user Myriam Mertens. The top navigation bar includes the DMP ONLINE .BE logo, a signed-in message ("Signed in as Myriam Mertens"), and links for "View plans", "Create plan", "About", and "Help". The main section is titled "Edit profile" and contains a note: "Please note that your institutional email address is used as your username." Below this, a message says "You can edit some of the details below." A blue callout box on the right provides instructions for linking accounts: "Link account to ORCID to:" followed by "- Sign in with ORCID iD" and "- Link multiple accounts (e.g. when multiple affiliations, or affiliation changes)". A blue arrow points from the "Link account to ORCID to:" text towards the ORCID identifier field. The profile fields shown include:

Email	myriam.mertens@ugent.be
First name *	Myriam
Last name *	Mertens
Organisation	Ghent University
ORCID identifier	<a href="https://orcid.org/0000-0001-9412-3703">https://orcid.org/0000-0001-9412-3703</a>   Unlink from ORCID
Shibboleth Id	myriam.mertens@ugent.be

# Creating a plan

Signed in as Myriam Mertens ~

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

Create a new plan

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

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

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

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

Ghent University

Ghent University

Hasselt University

Research Institute for Nature and Forest

Scientific Institute of Public Health

University of Antwerp

Université libre de Bruxelles

Vrije Universiteit Brussel

DCC

Faculty of Law & Criminology

[Create plan](#)

Select funder to get its template

Select institution to get local guidance, as well as institutional template(s) - if funder not applicable

Choose additional optional guidance

# Writing a plan

**Question**

Which data produced and/or used in the project will be made openly available as the default? If some data is kept closed provide a rationale for doing so.

All de-identified data underpinning journal articles will be made openly available, along with the associated documentation files, to enable verification of published claims and data reuse. As stated in the consent forms, the raw data files containing personally identifying information will be stored securely in a trusted data repository and will only be shared via secure access mechanisms with authorized researchers who have agreed to maintain confidentiality.

**Write down your answer here**

**Save**

**Progress indicator**

1/34 questions answered  
approx. 25% of available space used

**Section**

Version information (4 questions, 0 answered)

1. Data summary (6 questions, 0 answered)

2.1 FAIR data: Making data findable, including provisions for metadata (6 questions, 0 answered)

2.2. FAIR data: Making data openly accessible (5 questions, 1 answered)

**Leave a comment for collaborators**

**Guidance**

Participating in the ORD pilot does not necessarily mean opening up all your research data. Rather, the ORD pilot follows the principle "as open as possible, as closed as necessary" and focuses on encouraging sound data management as an essential part of research best practice.

If certain datasets cannot be shared (or need to be shared under restrictions), explain why, clearly separating legal and contractual reasons from voluntary restrictions.

Note that in multi-beneficiary projects it is also possible for specific beneficiaries to keep their data closed if relevant provisions are made in the consortium agreement and are in line with the reasons for opting out.

**Custom guidance from funder, university, group...**

# Sharing a plan

**My project (Generic DMP )**

Plan details Generic DMP Share Export

You can give other users access to your plan here. There are three permission levels.

Users with "read only" access can only read the plan.  
 Editors can contribute to the plan.  
 Co-owners can also contribute to the plan, but additionally can edit the plan details and control access to the plan.

Add each collaborator in turn by entering their email address below, choosing a permission level and clicking "Add collaborator".

Those you invite will receive an email notification that they have access to this plan. A notification is also issued when a user's permission level is changed.

**Collaborators**

Email address	Permissions
Myriam Mertens	Owner

**Manage collaborators**

**Add collaborator**

Email

Permissions:

Read only

Editors can contribute to plans. Co-owners have additional rights to edit plan details and control access.

Add collaborator

**Add collaborator by entering email address**

**Select permission level**

# Exporting a plan

The screenshot illustrates the process of exporting a project plan from the DMP Online platform. The interface is titled "My project (Horizon 2020 FAIR DMP)".

**Top Navigation:** Plan details, Horizon 2020 FAIR DMP, Share, Export.

**Main Content Area:**

- A message: "From here you can download your plan in various formats. This may be useful if you need to submit your plan as part of a grant application. Select what format you wish to use and click to 'Export'."
- A dropdown menu for "Format" with options: pdf (selected), text, docx. An "Export" button is highlighted with a blue circle and an arrow pointing to it.
- A modal window titled "Select export format" is open, containing a "Title" section with a "DMP title" input field and a "Save" or "Reset" button.
- An "Included Elements" section lists "Admin details" (Project Name, Project Identifier, Grant Title, Principal Investigator / Researcher, Project Data Contact, Description, Funder, Institution) and "Sections" (Version information, Data summary).
- A callout box labeled "Adjust export settings as needed" points to the "Included Elements" section.
- A sidebar on the right contains a section titled "2.2. FAIR data: Making data openly accessible" with detailed text about data availability and de-identification.