Getting Started with Data Management & DMPTool

University of North Carolina at Greensboro (UNCG)

Adapted by Jo Klein from slides made available by DMPTool

Overview

1. Why is data management important? (slide 3)

2. What is a data management plan? (slide 6)

3. Using DMPTool (slide 17)

DMPTool

Overview

1. **Why is data management important?**
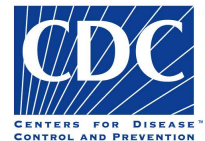2. What is a data management plan?
3. Using DMPTool

Why is data management important?

Data sharing allows for **reproducibility**, **transparency**, and **data reuse** in research.

Sharing is easier if **data are managed well** from the start of a project.

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Data management & sharing mandates

- Journals – PLOS, Nature, JDAP partners
- Funders – NSF, NIH…
- Office of Science & Technology Policy mandate, February 2013

Overview

1. Why is data management important?
2. **What is a data management plan?**
3. Using DMPTool

DMPTool

What is a data management plan?

A document that describes what you
will do with your data
during your research
and after you complete your project

DMPTool

Why prepare a DMP?

- Saves time

- Increases research efficiency

- Satisfies funder requirements

- Makes reproducibility & sharing easier

DMPTool

A DMP is a living document

- Keep your plan current
- Incorporate changes
- Use as a guide for daily activities

DMPTool

Where to start?

Small & Simple

- Document what you know **now**

- Share the plan with your team

- Avoid procrastination and immobilization

DMPTool

Components of a basic DMP

1. Types of data
2. Data & metadata standards
3. Policies
4. Plans for preservation
5. Budget

DMPTool

1. Types of data

- Types of data produced

- Relationship to existing data

- How/when/where will the data be captured or created?

- How will the data be processed?

- Quality assurance & quality control measures

- Security: version control, backing up

- Who will be responsible for data management during/after project?

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2. Data & metadata standards

- What metadata are needed to make the data meaningful?

- How will you create or capture these metadata?

- Why have you chosen particular standards and approaches for metadata?

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3. Policies for access, sharing, reuse

- Are you under any obligation to share data?

- How, when, & where will you make the data available?

- What is the process for gaining access to the data?

- Who owns the copyright and/or intellectual property?

- Will you retain rights before opening data to wider use? How long?
- Are permission restrictions necessary?
- Embargo periods for political/commercial/patent reasons?
- Ethical and privacy issues?
- How should your data be cited?

DMPTool

4. Plans for archiving & preservation

- What data will be preserved for the long term? For how long?

- Where will data be preserved?

- What data transformations need to occur before preservation?

- What metadata will be submitted with the datasets?

- Who will be responsible for preparing data for preservation?

- Who will be the main contact person for the archived data?

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5. Budget

- Costs of data preparation & documentation
    - Hardware, software
    - Personnel
    - Repository fees
- How costs will be paid
    - Request funding!

DMPTool

Overview

1. Why is data management important?

2. What is a data management plan?

3. **Using DMPTool**

DMPTool
Build your Data Management Plan

Welcome

Create data management plans that meet institutional and funder requirements.

Get started

DMPTool by the numbers

29,080
Users

25,417
Plans
More

232
Participating institutions
More

Top 5 templates

Department of Energy (DOE): Office of Science

Digital Curation Centre

NSF-BIO: Biological Sciences

NSF-SBE: Social, Behavioral, Economic Sciences

NIH-GEN: Generic

More

DMPTool News   We have lift off – DMPRoadmap launches!   Go to the blog
RSS

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Funder guidance
Public plans
Data management resources

Create an account with an email address

Sign in | Create account

* **First Name**

Irma

* **Last Name**

Minerva

* **Email**

iminerva@uncg.edu

* **Organization**

University of North Carolina at Greensboro (uncg.edu)

* **Password**

●●●●●●●●●●●●●●●●●●●

☐ Show password

* ☑ I accept the terms and conditions

Security check

☐ I'm not a robot   reCAPTCHA
Privacy - Terms

Create account

DMPTool

Edit profile
Logout

University of North Carolina at
Greensboro

...olina at Green...

My Dashboard   Create plan

Edit profile

Personal Details   Password   Notification Preferences

Please note that your email address is used as your username. If you change this, remember to use your new email address on sign in.

You can edit any of the details below.

* Email

iminerva@uncg.edu

* First name

Irma

* Last name

Minerva

* Organization

University of North Carolina at Greensboro (uncg.edu)

ORCID

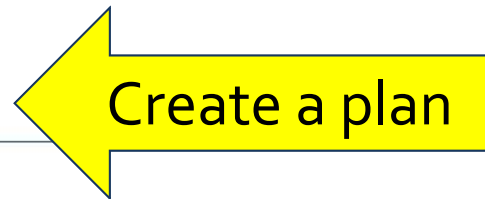iD Create or connect your ORCID iD

Set up your profile and notification preferences

Add your ORCID

University of North Carolina at Greensboro

University of North Carolina at Green...

My Dashboard   Create plan

Create a plan

My Dashboard

The table below lists the plans that you have created, and that have been shared with you by others. You can edit, share, download, make a copy, or remove these plans at any time.

Project Title	Template	Edited	Role	Test	Visibility	Shared	
UNCG University Libraries GIS & Data Visualization Needs Ass ...	Institute of Museum and Library Services (IMLS)	01-13-2020	Owner	☐	Private	No	Actions▾
Test plan	Digital Curation Centre	04-17-2021	Owner	☐	Private	No	Actions▾

Create plan

My Dashboard:

1. My plans

2. ~~Plans created by others at my organization & shared internally~~ (for affiliated institutions only: UNCG is not an affiliated institution)

Create a new plan

Before you get started, we need some information about your research project to set you up with the best

* What research project are you planning?

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☐ mock project for testing, practice, or educational purposes

* Select the primary research organization

Organization

University of North Carolina at Greensboro (uncg.edu)

- or - ☐ No research organization associated with this plan or my research organization is not listed

* Select the primary funding organization

Funder

Institute of Museum and Library Services (IMLS)

- or - ☐ No funder associated with this plan or my funder is not listed

[Create plan] [Cancel]

1. Enter project title
2. Select research organization
3. Select funder
4. (If a funder has multiple templates) Select template

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| Project Details | Collaborators | Write Plan | Research Outputs | Download | Finalize / Publish |

* Project title

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☐ mock project for testing, practice, or educational purposes

Project abstract

| **B** | *I* | ☰ ▾ | ☷ ▾ | 🔗 | ⊞ ▾ |

Project Start

mm / dd / yyyy

Project End

mm / dd / yyyy

☐ Research outputs may have ethical concerns

Funder

Institute of Museum and Library Services (IMLS)

Funding Opportunity Number

Grant number/url

Save

Select Guidance

To help you write your plan, dmptool can show you guidance from a variety of organizations.

Select up to 6 organizations to see their guidance.

☑ DMPTool

☑ University of North Carolina-Chapel Hill (UNC-CH)

Find guidance from additional organizations below

See the full list

Save

Add an abstract, other info about the project & select guidance

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| Project Details | Collaborators | Write Plan | Research Outputs | Download | Finalize / Publish |

Project Contributors

Please list the project's Principal Investigator(s) and those responsible for data management.

Name ▲	ORCID	Email ⇕	Affiliation ⇕	Roles	
Irma Minerva		iminerva@uncg.edu	University of North Carolina at Greensboro (uncg.edu)	Data Manager Principal Investigator Project Administrator	Actions▾

[Add a contributor]

DMP Collaborators

Invite specific people to read, edit, or administer your plan. Invitees will receive an email notification that they have access to this plan.

Email address	Permissions	
iminerva@uncg.edu	Owner	
lorepsum@uncg.edu	Read only	

Invite collaborators

* Email

* Permissions
- ○ Co-owner
- ○ Editor
- ○ Read only

[Submit]

Add project contributors and invite collaborators to coauthor the plan.

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| Project Details | Collaborators | Write Plan | Research Outputs | Download | Finalize / Publish |

This plan is based on the "IMLS Digital Product Form (Data Management Plan)" template provided by Institute of Museum and Library Services (IMLS) - (ver: 0, pub: 2020-09-01).

expand all | collapse all   0/29

+ SECTION I: INTELLECTUAL PROPERTY RIGHTS AND PERMISSIONS (0 / 2)   +

+ SECTION II: DIGITAL CONTENT, RESOURCES, OR ASSETS (0 / 10)   +

Complete this section if your project will create digital content, resources, or assets. These include both digitized and born-
through community gatherings during your project. Examples include, but are not limited to, still images, audio files, moving
artworks, books, posters, curricula, field books, maps, notebooks, scientific labels, metadata schema, charts, tables, drawi
involve making these materials available through public or access-controlled websites, kiosks, or live or recorded programs.

A.1 Describe the digital content, resources, or assets you will create or collect, the quantities of each type, and the format(s) you will use.

| B | I | ☰ ▾ | ☰ ▾ | 🔗 | ⊞ ▾ |

Save

Get instructions and guidance; leave comments for collaborators

| Guidance | Comments |

DMPTool

expand all | collapse all

| Data description | + |
| Data format | + |

Expand each section to answer the questions

![DMPTool logo]

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| Project Details | Collaborators | Write Plan | Research Outputs | Download | Finalize / Publish |

New research output

View all research outputs

* Type

Dataset

* Title

Abbreviation

Description

B *I* ☰ ▾ ☷ ▾ 🔗 ⊞ ▾

☐ **May contain sensitive data?**   ☐ **May contain personally identifiable information?**

Intended repositories

UNC Dataverse (Remove)

UNC Dataverse is an open-source repository software application for archiving, sharing, and accessing research data of all kinds. Each dataverse within the larger repository contains a multitude of datasets, and each dataset contains descriptive metadata and data files. UNC Dataverse is hosted by Odum Institute for Research in Social Science.

More info

Add a repository

Initial license

- Please select one -

For guidance on selecting a license:
https://creativecommons.org/about/cclicenses/

Anticipated file size

MB

Save   Cancel

Select your research outputs, intended repositories, and other known information

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| Project Details | Collaborators | Write Plan | Research Outputs | Download | Finalize / Publish |

Format

pdf ▾

Download settings

Optional Plan Components

☐ project details coversheet
☑ question text and section headings
☑ unanswered questions

PDF formatting

Font

Face	Size (pt)		Margin (mm)			
			Top	**Bottom**	**Left**	**Right**
Arial, Helvetica, Sans-Serif ▾	10 ▾		25 ▾	25 ▾	25 ▾	25 ▾

Download Plan

Download your plan
(csv, html, pdf, text,
docx, json)

DMPTool

Chatting with patrons

| Project Details | Collaborators | Write Plan | Research Outputs | Download | Finalize / Publish |

Set plan visibility

Public or organizational visibility is intended for finished plans. You must answer at least 50% of the questions to enable these options. Note: test plans are set to private visibility by default.

- ○ Private: visible to me, specified collaborators and administrators at my organization
- ○ Organization: anyone at my organization can view
- ○ Public: anyone can view

Save

Register your plan and add to ORCID

Get a DMP ID for your data management plan.

In order to register your plan you must have completed the following:

- ✗ answered at least 50% of questions
- ✓ identified your funder
- ✗ authorized DMPTool to add works to your ORCID record via your DMPTool profile page
- ✗ plan is not a mock project for testing, practice, or educational purposes

Once the steps above are satisfied, a button to register your plan will appear here.

> Set plan visibility and add your plan to ORCID to get a shareable/citable DMP ID

DMPTool

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blog.dmptool.org

DMPTool Blog

Guidance & resources for your data management plan

🔍 Search

About the DMPTool

Go to the Tool

DMPTool Webinars

DMP Competition Winners: DMPs so good they go to 11

Posted on **May 19, 2021** by **mariapraetzellis**

Last December we announced the inaugural *Qualitative Data Management Plan (DMP) Competition,* sponsored jointly by The Qualitative Data Repository, Princeton Research Data Service, and the DMPTool. As qualitative researchers writing such plans frequently ask for examples of excellent DMPs for qualitative research, we hoped that this competition would assemble a trove of exemplar DMPs that we could share with the research community.

We received a wealth of excellent submissions. Many of the DMPs were so good in fact, that for that extra push over the cliff we decided to expand our pool of awardees from 10 to 11 outstanding Qualitative DMPs from a wide range of disciplines. We couldn't be more excited to announce these winners today. We're hugely thankful to everyone who submitted a DMP, and, of course, to the five data management experts who judged the entries (listed below).

Each entry was reviewed by three expert judges. They assessed DMPs on a 1-4 (not adequate to exemplary) scale for each item in an 18-item rubric rubric based on the DART

Jo Klein

GIS & Data Visualization
Librarian

ejklein@uncg.edu

Or contact your library liaison!

go.uncg.edu/libliaisons

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