

Support Your Research with DMP Assistant 2.0!



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portage



UNIVERSITY OF ALBERTA
LIBRARY



NDRIO
New Digital
Research Infrastructure
Organization

NOIRN
Nouvelle organisation
d'infrastructure de
recherche numérique



Agenda

- + 01. Introduction to Data Management Plans (DMPS)
- + 02. Introduction to the DMP Assistant 2.0
- + 03. Walkthrough: Creating a DMP & End User Features
- + 04. Highlights: Institutional Administrator Features
- + 05. Looking Ahead & Questions

Data Management Plans (DMPs)

- A formal document which clearly articulates the strategies and tools you will implement to effectively manage your data.
- Speaks to the management of data both *during* the active phases of your research and *after* the completion of the research project.
- A *“living”* document that can be modified throughout your project to reflect any changes that have occurred.

Objective:

To address issues related to data management prior to starting your research project!

For more information on DMPs:



DATA MANAGEMENT PLANS

This brief guide provides basic information about data management plans (DMPs). More resources for DMPs can be found on the [Portage website](#), including a [Brief Guide for creating an effective DMP](#).

WHAT IS A DATA MANAGEMENT PLAN (DMP)?

A DMP is a formal document that details the strategies and tools you will implement to effectively manage your data both *during* your research project and *after* its completion.

WHY CREATE A DMP?

Efficiency - identify both strategies and potential challenges in advance; develop sound data practices for your research team; prepare data for effective use during your project.

Research Quality - ensure reliability and accuracy of data through careful documentation of your data collection, handling and stewardship practices.

Reusability and Impact - Improve discoverability, accessibility, and reusability of your data by planning for sharing in a repository; increase the potential impact of your research!

Compliance - Satisfy DMP requirements that may be set forth by specific granting agencies or even your own institution.

COMPONENTS OF A DMP

- **Data collection:** data types, file formats, naming and version control
- **Documentation:** ensure data can be read and interpreted
- **Data storage and backup throughout the research**
- **Data preservation strategy for long-term access**
- **Provisions for sharing and reuse**
- **Data management responsibilities and resources**
- **Ethical and legal compliance**

<https://doi.org/10.5281/zenodo.4001010>

CREATE AN EFFECTIVE DATA MANAGEMENT PLAN

This brief guide presents a general framework for creating an effective data management plan (DMP) to help you plan and organize your research and to meet research funder requirements.

To prepare your DMP, visit the [Portage DMP Assistant tool](#).

GENERAL GUIDELINES

- Begin by providing a description of your research project, its focus, and purpose.
- Avoid the extensive use of discipline specific jargon - your DMP should be easily understood by anyone.
- Provide clarification for any acronyms used.
- Do not leave sections or questions blank.
- Provide rationale for decisions made - help others understand why you have made a decision.
- Your DMP is a living document - update it as needed!

DATA COLLECTION

- Include descriptions of how you will collect data, including from where and in what format(s).
- Provide an estimate of the amount of data you will collect (e.g., MBs/GBs/TBs).
- Describe any software and/or platforms that will be used for data collection.
- Clearly explain how you will both store and transfer data.
- Explain how you will organize your data, including details relating both to file naming and versioning.

DOCUMENTATION AND METADATA

- Describe what information will be needed for others to understand or reuse your data.
- Describe how you will consistently capture documentation throughout the project.
- Choose a metadata standard suited to your discipline and/or chosen data repository or provide rationale for creating your own.



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Portage Network | portage@carl-abrc.ca | portagenetwork.ca

<https://doi.org/10.5281/zenodo.4004956>

PRIMER DATA MANAGEMENT PLANS

What is a data management plan (DMP)?

A DMP is a formal document that details the strategies and tools you will implement to effectively manage your data during the active phase of your research, and the mechanisms you will use for preserving and appropriately sharing your data at the end of the project. A DMP is a "living" document that can be modified throughout your project to reflect any changes that have occurred. More resources for DMPs can be found on the [Portage website](#), including a [Brief Guide for creating an effective DMP](#).

Why create a DMP?

A DMP helps you:

- Meet grant application requirements and/or adhere to institutional data mandates.
- Make it easier for all team members to document, understand, find, and use the data.
- Plan the resources, tools, and expertise needed for data management.
- Identify challenges for storing, handling, and managing the types and volume of data.
- Ensure reliability, authenticity, accuracy, and reproducibility of your data.
- Have a detailed account of your data collection, handling, and stewardship practices.
- Plan how to make your data FAIR (findable, accessible, interoperable, and reusable) to maximize the research potential and impact of your data.

Standard Components of a DMP

Data collection:

- Describe the data that you will be collecting, including the type, format, and volume.
- Describe *how* you will be collecting your data.
- Establish standards for naming and organizing data files, folders, and versions.

Documentation and metadata (description of data):

- Describe how you will ensure that your data are understandable, interpretable, and usable both by current and future researchers.
- Provide descriptive information for your data to be discoverable once deposited at the end of your project.

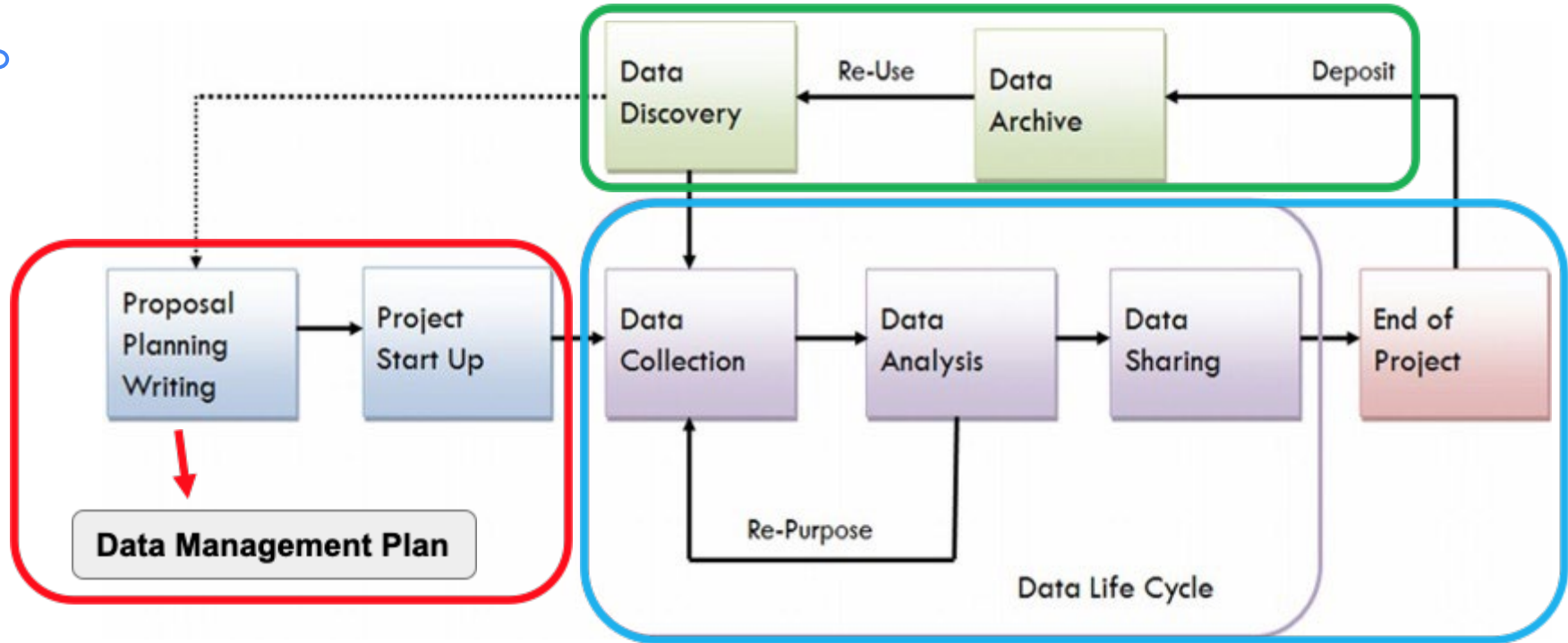
<https://doi.org/10.5281/zenodo.4001010>



DMPs & the Research Lifecycle

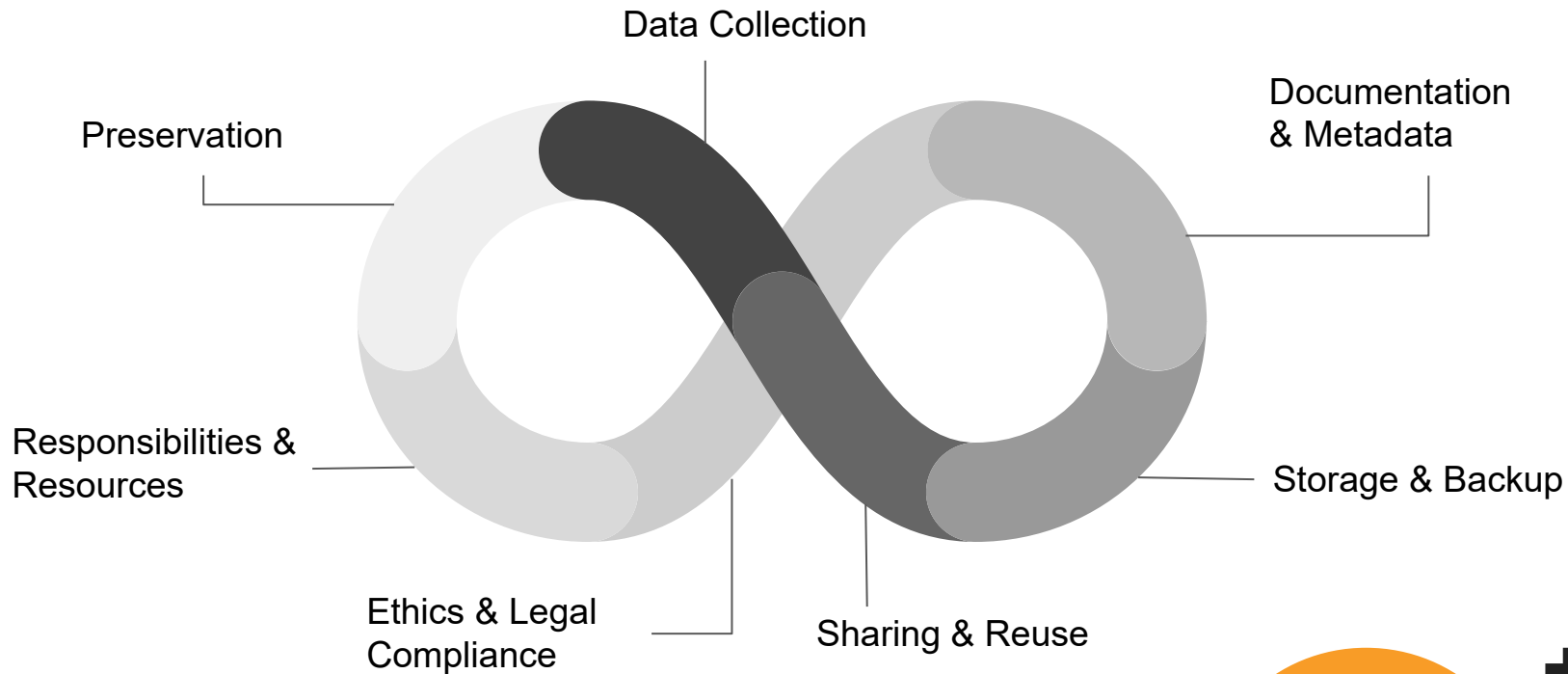


RDM - managing data throughout all phases of the research lifecycle through **planning**, **active research**, and **beyond** !



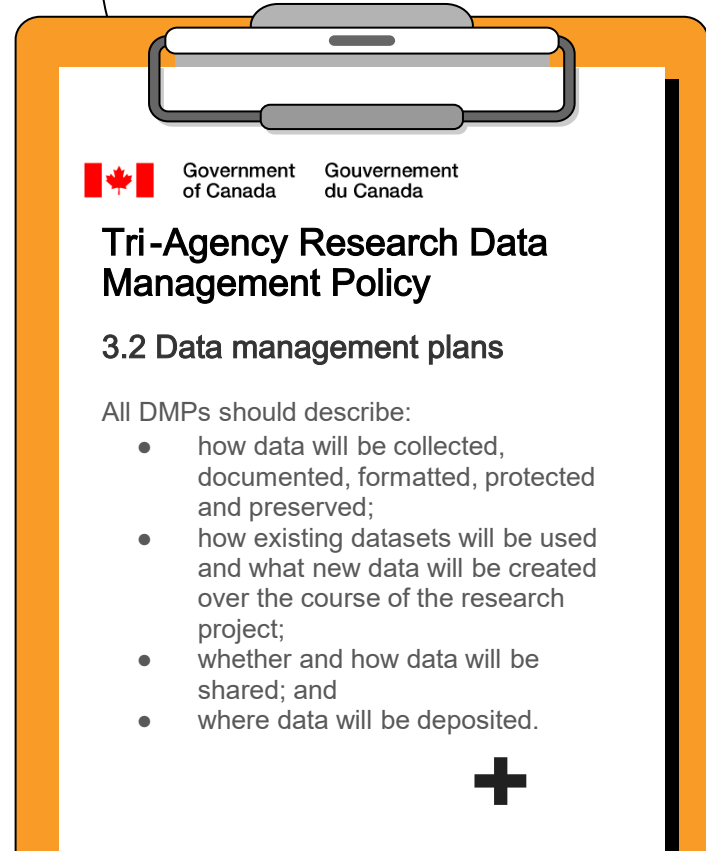
DMPs & the Research Lifecycle

A DMP provides information across key research lifecycle categories:



Why DMPs?

- Because it is **good practice** .
- Because it is **practical** .
- Because it *is* and/or *will be* **required** .



Portage Network of Experts



Network of Experts



NDRIO | **NOIRN**
New Digital Research Infrastructure Organization
Nouvelle organisation d'infrastructure de recherche numérique

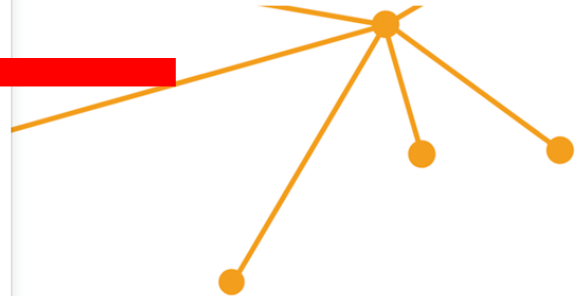


THE PORTAGE NETWORK

is dedicated to the shared stewardship of research data in Canada through:

- Developing a national research data culture
- Fostering a community of practice for research data
- Building national research data services and infrastructure

- Council of Chairs
- Curation
- Data Management Planning
- Data Repositories
- Dataverse North
- Discovery and Metadata
- Preservation
- Research Intelligence
- Sensitive Data
- Training



<https://portagenetwork.ca/>



Store, share, publish and discover research data!

Scholars Portal **Dataverse**

Training Resources



Portage Zenodo Community



Portage DMP Assistant



- Hosted by the University of Alberta Library and supported by the Portage Network.
- A national, open, bilingual data management planning (DMP) tool to help researchers better manage their data throughout the lifespan of a project.
- Develops a DMP by prompting researchers to answer a number of key data management questions, supported by best-practice guidance and examples.

<https://assistant.portagenetwork.ca/>

portage



**UNIVERSITY OF ALBERTA
LIBRARY**

Portage DMP Assistant



- Original DMP Assistant was adapted from the **Digital Curation Centre (DCC)** and their **DMPonline** tool.
- French user interface originally produced with support from the **Université de Montréal Library**.
- DMP Assistant 2.0 uses the **DMPRoadmap** codebase developed by DCC and the **University of California Curation Center (UC3)**.



University of California
CDL
California Digital Library



UC3

UC Curation Center

Portage DMP Assistant



Researchers can:

- **Create project plans**, using a generic template or an institution-, discipline-, or methodology-specific template;
- **See guidance** appropriate to the particular template they are using;
- **Collaborate** with multiple researchers on a plan;
- **Connect** to local guidance and support for data management at their academic institutions.

<https://assistant.portagenetwork.ca/>

Portage DMP Assistant



Institutions can:

- **Customize** the default Portage template for their institution;
- Create **institution -specific** templates and guidance;
- View information about DMP Assistant **usage** at their institution.

<https://assistant.portagenetwork.ca/>

DMP ASSISTANT 2.0 LAUNCH!



March 3, 2021

Portage DMP Assistant 2.0!



Version 2.0 has several new features & benefits, including:

- The ability to **'clone' DMPs** for use in similar projects;
- The ability for institutions to create **more flexible DMP templates** in terms of institutional customization as well as enhanced template development functions such as cloning, use of phases and themes, and working from a range of new discipline- and methodology-specific templates;
- New **usage statistics dashboards** for institutional administrators.

Welcome to DMP Assistant.

DMP Assistant has been developed by the **Portage Network** to help you write data management plans.

Getting started:

- Digital Curation Centre
- UC3: University of California Curation Center
- UK funder requirements for Data Management Plans
- US funder requirements for Data Management Plans
- DCC Checklist for a Data Management Plan
- DMP Assistant equivalent in France
- France funder requirements for Data Management Plans

<https://assistant.portagenetwork.ca/>

Sign in Create account

* **First Name**

* **Last Name**

* **Email**

Organisation

My organisation isn't listed.

* **Password**

Show password

* I accept the terms and conditions

Create account



Bienvenue sur l'Assistant PGD.

L'Assistant PGD a été mis au point par le **Réseau Portage** pour vous aider à rédiger des plans de gestion des données.

Commencer :

- Digital Curation Centre
- UC3: University of California Curation Center
- Exigences des bailleurs de fonds du R.-U. en matière de PGD
- Exigences des bailleurs de fonds des É.-U. en matière de PGD
- Liste de vérification du DCC pour un PGD
- Équivalent de l'Assistant PGD en France
- Exigences des bailleurs de fonds de la France en matière de PGD

Se connecter **Créer un compte**

* **Courriel**

* **Mot de passe**

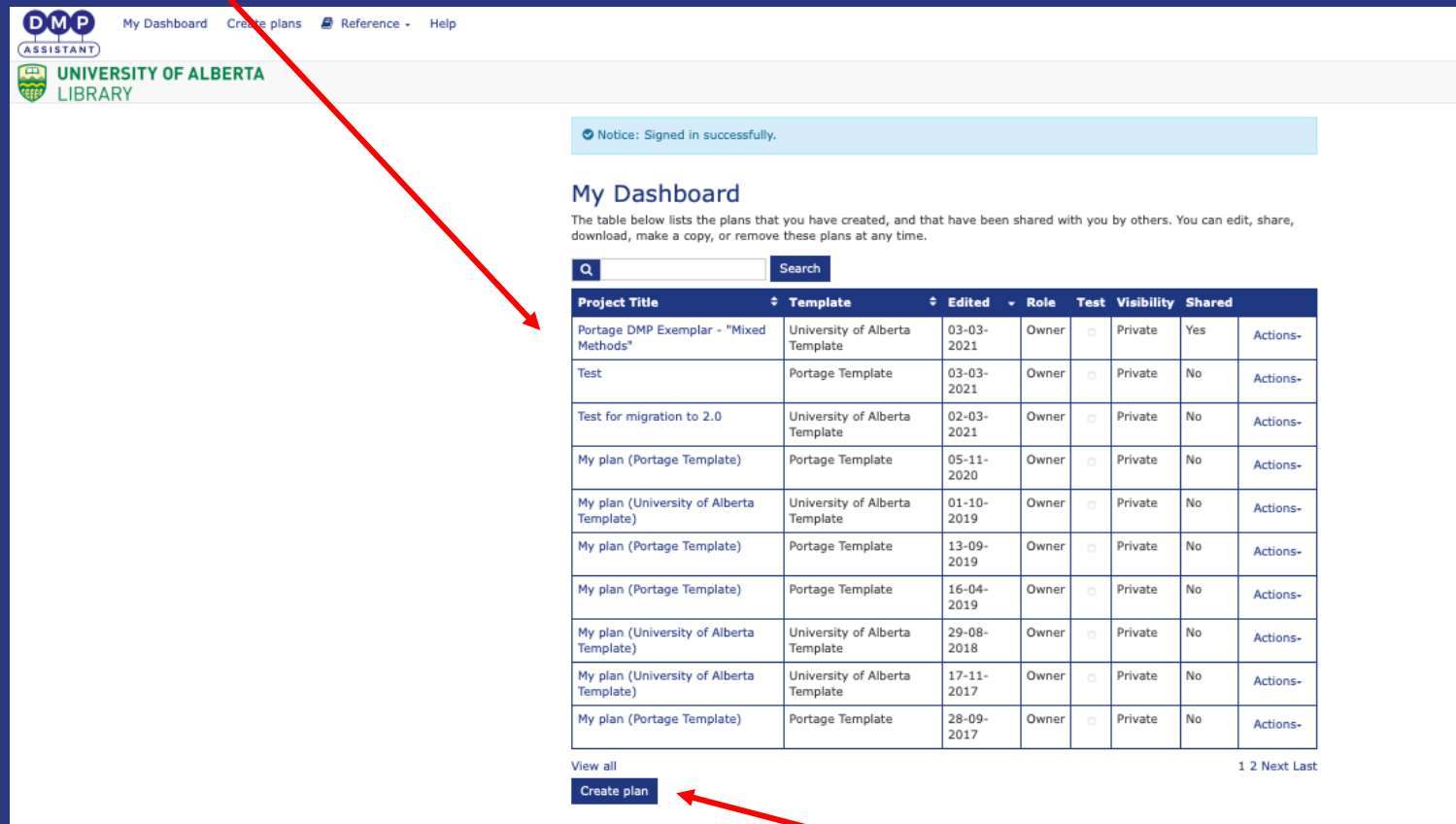
Mot de passe oublié?

Mémoriser le courriel

Se connecter

https://assistant.portagenetwork.ca/?locale=fr_CA

Upon signing in, you can either access an existing DMP...



DMP ASSISTANT My Dashboard Create plans Reference - Help

UNIVERSITY OF ALBERTA LIBRARY

Notice: Signed in successfully.

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.

Q Search

| Project Title | Template | Edited | Role | Test | Visibility | Shared | |
|------------------------------------------|--------------------------------|------------|-------|--------------------------|------------|--------|----------|
| Portage DMP Exemplar - "Mixed Methods" | University of Alberta Template | 03-03-2021 | Owner | <input type="checkbox"/> | Private | Yes | Actions- |
| Test | Portage Template | 03-03-2021 | Owner | <input type="checkbox"/> | Private | No | Actions- |
| Test for migration to 2.0 | University of Alberta Template | 02-03-2021 | Owner | <input type="checkbox"/> | Private | No | Actions- |
| My plan (Portage Template) | Portage Template | 05-11-2020 | Owner | <input type="checkbox"/> | Private | No | Actions- |
| My plan (University of Alberta Template) | University of Alberta Template | 01-10-2019 | Owner | <input type="checkbox"/> | Private | No | Actions- |
| My plan (Portage Template) | Portage Template | 13-09-2019 | Owner | <input type="checkbox"/> | Private | No | Actions- |
| My plan (Portage Template) | Portage Template | 16-04-2019 | Owner | <input type="checkbox"/> | Private | No | Actions- |
| My plan (University of Alberta Template) | University of Alberta Template | 29-08-2018 | Owner | <input type="checkbox"/> | Private | No | Actions- |
| My plan (University of Alberta Template) | University of Alberta Template | 17-11-2017 | Owner | <input type="checkbox"/> | Private | No | Actions- |
| My plan (Portage Template) | Portage Template | 28-09-2017 | Owner | <input type="checkbox"/> | Private | No | Actions- |

View all 1 2 Next Last

[Create plan](#)

..or create a new one

NEW in 2.0, you can also 'copy' or 'clone' an existing DMP for similar projects or funder requirements ...

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.

Q Search

| Project Title | Template | Edited | Role | Test | Visibility | Shared | Actions |
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| My plan (Portage Template) | Portage Template | 05-11-2020 | Owner | <input type="checkbox"/> | Private | No | Actions- |
| My plan (University of Alberta Template) | University of Alberta Template | 01-10-2019 | Owner | <input type="checkbox"/> | Private | No | Actions- |
| My plan (Portage Template) | Portage Template | 13-09-2019 | Owner | <input type="checkbox"/> | Private | No | Actions- |
| My plan (Portage Template) | Portage Template | 16-04-2019 | Owner | <input type="checkbox"/> | Private | No | Actions- |
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| My plan (University of Alberta Template) | University of Alberta Template | 17-11-2017 | Owner | <input type="checkbox"/> | Private | No | Actions- |
| My plan (Portage Template) | Portage Template | 28-09-2017 | Owner | <input type="checkbox"/> | Private | No | Actions- |

View all 1 2 Next Last

Create plan

Actions

- Edit
- Share
- Download
- Copy**
- Remove



Data Management Plan Exemplar #3: Mixed Methods

Fictional Exemplar

Data Collection

What types of data will you collect, create, acquire and/or record?

We will be collecting surveys which will then be exported into tabular format.

We will also be conducting both semi-structured interviews and focus groups that will produce both digital audio and text (transcriptions) based data.

What file formats will your data be collected in? Will these formats allow for data re-use, sharing and long-term access to the data?

Our file formats will exist both in non-proprietary and proprietary formats. The non-proprietary formats will ensure that these data are able to be used by anyone wishing to do so once they are deposited and made openly available.

Surveys will exist in .csv (non-proprietary), MS Excel, & SPSS (both proprietary) formats. For more information regarding SPSS see: SPSS Wikipedia <https://en.wikipedia.org/wiki/SPSS>

Interviews & focus groups data will exist in .mp3 (non-proprietary), MS Word & NVivo (both proprietary) formats. For more information regarding NVivo see: NVivo Wikipedia <https://en.wikipedia.org/wiki/NVivo>

Any survey data deposited for sharing and long-term access will be in .csv format so that anyone can use them without requiring proprietary software.

The final de-identified versions of the interviews and focus groups transcripts will be exported into a basic non-proprietary text format for deposit, long-term preservation and access.

If data are collected using laptops or mobile devices, please explain how you will securely store and transfer the data.

Laptops are not being used for any data collection, though encrypted digital voice recorders (DVRs) will be used to collect both interviews and transcripts. Interviews and focus group digital audio files will not be stored on the DVRs, only collected and then securely transferred to the project's cloud based virtual research environment space via a secure FTP (File Transfer Protocol).



You can choose to answer questions within any given section at any time ...

The screenshot displays the DMP Assistant interface. At the top, there is a navigation bar with the DMP Assistant logo and links for 'My Dashboard', 'Create plans', 'Reference', and 'Help'. Below this is the University of Alberta Library logo. The main content area shows a project titled 'Portage DMP Exemplar - "Mixed Methods"'. A sub-navigation bar includes 'Project Details', 'Plan overview', 'Write Plan', 'Share', and 'Download'. The 'Write Plan' section is active, showing a progress indicator '22/22 answered'. A list of sections is displayed, each with a plus sign to expand it:

- Data Collection (6 / 6)
- Documentation and Metadata (3 / 3)
- Storage and Backup (2 / 2)
- Preservation (3 / 3)
- Data Sharing and Reuse (4 / 4)
- Responsibilities and Resources (4 / 4)

Dedicated space as well as customized guidance is provided for each question ...

Documentation and Metadata (3 / 3)

What documentation will be needed for the data to be read and interpreted correctly in the future? This includes study-level documentation, data-level description, and any other contextual information required to make the data usable by other researchers.

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

Survey data will be collected within [REDCap](#), a secure electronic data capture and management software hosted by the Women & Children's Health Research Institute (WCHRI) at the University of Alberta. REDCap features include the ability to develop and export a data dictionary which will outline all codes and variables within the survey. Key documentation related variables will be automatically populated within the survey data including time and date stamps and other key information to support data management and analytic activities.

All qualitative interviews will include summary information including: data collector, location of interview, and the date that the interview was conducted. Additionally, qualitative interviews will have accompanying field notes containing key contextual information and metadata.

File naming documentation will be developed and implemented. Components of file names will include as needed: file version (raw, edit, master, analytic), date (ie., dd/mm/yyyy), and any applicable key contextual information, (e.g., geographical location, interviewer initials or code).

Save

Guidance **Comments**

UAlberta

Your documentation may include study-level information about:

- who created/collected the data
- when it was created
- any relevant study documents
- conditions of use
- contextual details about data collection methods and procedural documentation about how data files are stored, structured, and modified.

A complete description of the data files may include:

- naming and labelling conventions
- explanations of codes and variables
- any information or files require to reproduce derived data.

More information about data documentation is available at the [UK Data Archive](#)

For any given question you are able to 'share notes' with your collaborators ...

Portage DMP Exemplar - "Mixed Methods"

Project Details Plan overview **Write Plan** Share Download

expand all | collapse all 22/22 answered

Data Collection (6 / 6)

What types of data will you collect, create, acquire and/or record?

B *I*

We will be collecting surveys which will then be exported into tabular format.

We will also be conducting both semi-structured interviews and focus groups that will produce both digital audio and text (transcriptions) based data.


Guidance **Comments (1)**

Hey Sharon - I think that the surveys will be exported into tabular format like a .csv file??

[mitchelldoiron@hotmail.com](#) 2 years ago
Edit Remove

Add comments to share with collaborators

B *I*



You can easily add collaborators to your DMP, with different permissions settings ...

Portage DMP Exemplar - "Mixed Methods"

Project Details Plan overview Write Plan Share Download

Set plan visibility

Public or organisational visibility is intended for finished plans. You must answer at least 0% 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 organisation
- Organisation: anyone at my organisation can view
- Public: anyone can view

Manage 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 | |
|----------------------------|---------------------------------------|---------------------------------------|
| mitchelldoiron@hotmail.com | Owner | |
| jdoiron@ualberta.ca | <input type="text" value="Co-owner"/> | <input type="button" value="Remove"/> |

Invite collaborators

* Email

* Permissions

- Co-owner
- Editor
- Read only

A range of options are available both for formatting and downloading your DMP ...

Portage DMP Exemplar - "Mixed Methods"

Project Details Plan overview Write Plan Share **Download**

Download settings

Optional Plan Components

- project details coversheet
- question text and section headings
- unanswered questions

Format: **pdf** (selected)

- csv
- html
- pdf
- text
- docx

PDF formatting

Font

Face: Arial, Helvetica, Sans-Serif

Size (pt): 10

Margin (mm)

| Top | Bottom | Left | Right |
|-----|--------|------|-------|
| 25 | 20 | 12 | 12 |

Download Plan

Administrator Features

DMP ASSISTANT My Dashboard Create plans Reference Help Language Robyn Nicholson

portage portagenetwork.ca Support

My Dashboard

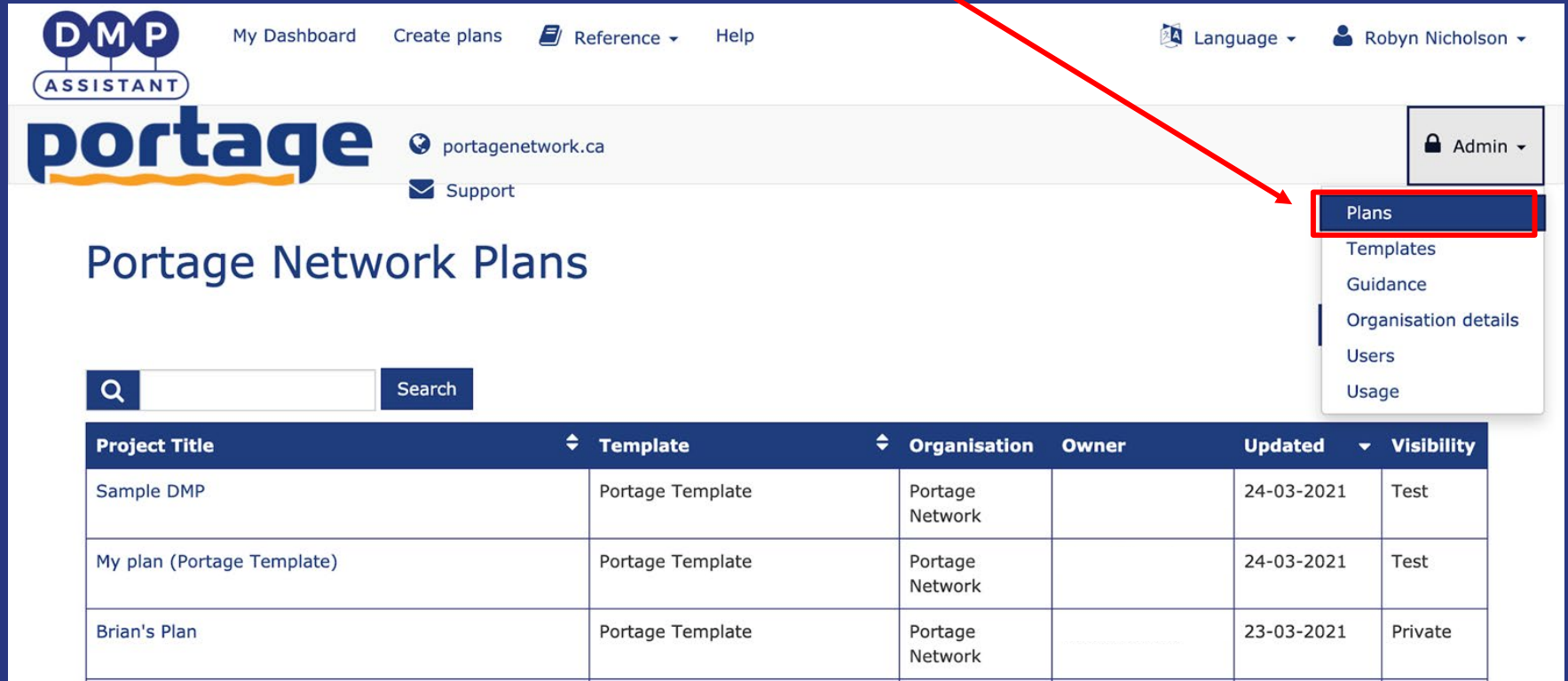
The table below lists the plans that you have created, and that have been shared with you by others. You can edit, share, download, make a copy of these plans at any time.

| Project Title | Template | Edited | Role | Test | Visibility | Share | Actions |
|-----------------------------------------------------------|-------------------------------------------------|------------|-------|--------------------------|------------|-------|---------|
| My plan (Portage Template) | Portage Template | 05-02-2021 | Owner | <input type="checkbox"/> | Private | No | Actions |
| Mon plan (Modèle Portage) | Portage Template | 09-12-2020 | Owner | <input type="checkbox"/> | Private | No | Actions |
| My plan (Portage Template) | Portage Template | 03-12-2020 | Owner | <input type="checkbox"/> | Private | No | Actions |
| My plan (University of British Columbia Generic Template) | University of British Columbia Generic Template | 27-10-2020 | Owner | <input type="checkbox"/> | Private | No | Actions |

Create plan

- Admin
- Plans
- Templates
- Guidance
- Organisation details
- Users
- Usage

Local administrators can view plans at their organization:



The screenshot shows the Portage Network Assistant interface. At the top, there is a navigation bar with 'DMP ASSISTANT' logo, 'My Dashboard', 'Create plans', 'Reference', and 'Help'. On the right, there are 'Language' and 'Robyn Nicholson' user options. Below the navigation bar, the 'portage' logo is displayed with 'portagenetwork.ca' and 'Support' links. A search bar is located below the logo. The main heading is 'Portage Network Plans'. On the right side, there is an 'Admin' dropdown menu with a lock icon. The 'Plans' option in this menu is highlighted with a red box, and a red arrow points from the text above to it. Below the menu, there is a table with columns: Project Title, Template, Organisation, Owner, Updated, and Visibility. The table contains three rows of data.

| Project Title | Template | Organisation | Owner | Updated | Visibility |
|----------------------------|------------------|-----------------|-------|------------|------------|
| Sample DMP | Portage Template | Portage Network | | 24-03-2021 | Test |
| My plan (Portage Template) | Portage Template | Portage Network | | 24-03-2021 | Test |
| Brian's Plan | Portage Template | Portage Network | | 23-03-2021 | Private |

Local administrators can templates at their institution ...

The screenshot shows the Portage DMP Assistant interface. At the top, there is a navigation bar with 'My Dashboard', 'Create plans', 'Reference', and 'Help'. The user is logged in as 'Robyn Nicholson'. The main header includes the 'portage' logo and the website 'portagenetwork.ca'. A dropdown menu is open, showing 'Plans', 'Templates' (highlighted), 'Guidance', 'Organisation details', 'Users', and 'Usage'. Below the header, the 'Templates' section is active, with a sub-tab 'Own Templates' selected. A search bar is present, and a table lists existing templates. A 'Create a template' button is visible at the bottom left.

Templates

If you wish to add an organisational template for a Data Management Plan, use the 'create template' button. You can create more than one template, e.g. one for researchers and one for PhD students. Your template will be presented to users within your organisation when no funder template is available. If you want to add questions to funder templates use the 'customise template' options below.

Own Templates Customisable Templates

Own Templates

All (14) Published (6) Unpublished (8)

Search

| Template Name | Description | Status | Edited Date | |
|-----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-------------|---------|
| Portage Template for Qualitative Health Sciences Research | This data management template is meant to be used by health sciences researchers conducting qualitative research on human subjects. It includes guidance on data management best practices beginning with data collection through to data sharing. | Published | 03-03-2021 | Actions |

Create a template

... or create a new institution -specific template.

Local administrators can also customize templates ...

The screenshot shows the Portage DMP Assistant interface. At the top, there is a navigation bar with 'My Dashboard', 'Create plans', 'Reference', and 'Help'. The user is identified as 'Robyn Nicholson'. The main header includes the 'portage' logo and the website 'portagenetwork.ca'. A dropdown menu labeled 'Admin' is open, showing options: 'Plans', 'Templates', 'Guidance', 'Organisation details', 'Users', and 'Usage'. The 'Guidance' option is highlighted. Below the header, the 'Templates' section is displayed. It includes a sub-header 'Own Templates' with two tabs: 'Own Templates' and 'Customisable Templates', where the latter is highlighted with a red box. Below the tabs, there is a section for 'Customizable Templates' with filters for 'All (1)', 'Published (0)', 'Unpublished (1)', and 'Not customised (0)'. A table lists the templates:

| Template Name | Funder | Status | Edited Date | |
|--------------------|-----------------|-------------|-------------|---------|
| * Portage Template | Portage Network | Unpublished | 02-03-2021 | Actions |

... and add institution -specific guidance.

DMP Assistant Institutional Customization Guide

Version 1.0

JULY 13, 2016

<https://bit.ly/39alkfy>

Developed by members of
the Portage DMP Customization Working Group

New DMP Templates

Portage is pleased to have published **five new** discipline- and methodology-specific Data Management Plan (DMP) Templates thus far ...

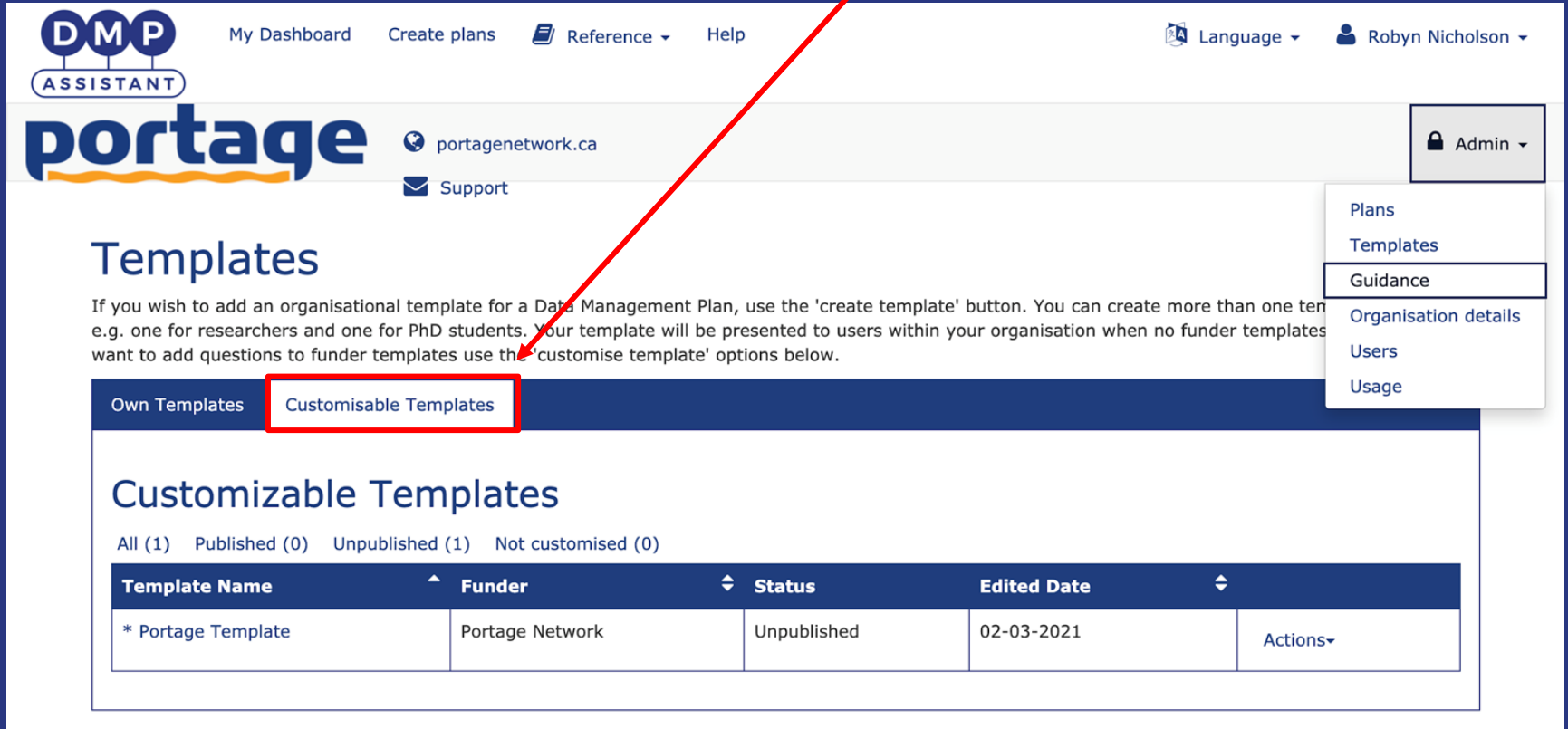
- Advanced Research Computing
- Arts -Based Research
- Interdisciplinary Health Software/Technology Development
- Mixed Methods (Surveys & Qualitative Research)
- Qualitative Health Sciences Research
- Le développement interdisciplinaire de logiciel ou de technologie en santé
- L'informatique de recherche avancée
- Les méthodes mixtes (enquêtes et recherche qualitative)
- La recherche basée sur les arts
- La recherche qualitative en sciences de la santé

New DMP Templates

... with **eight more** to come!

- CRDCN: Accessing Data from Research Data Centres
- CRDCN: Research Data Centres and External Analysis
- History and the Humanities
- Neuroimaging in the Neurosciences
- Open Science Workflows
- Studying Molecular Interactions
- Systematic Reviews
- Water Quality Research
- RCCDR : L'accès aux données des centres de données de recherche
- RCCDR : Les centres de données de recherche et les analyses externes
- La recherche en histoire et en humanités
- Les études en neuro-imagerie dans les neurosciences
- Les flux de travail en science ouverte
- L'étude des interactions moléculaires
- Les revues systématiques
- La recherche sur la qualité de l'eau

New templates will be available for customization ...



DMP ASSISTANT My Dashboard Create plans Reference Help Language Robyn Nicholson

portage portagenetwork.ca Support Admin

Templates

If you wish to add an organisational template for a Data Management Plan, use the 'create template' button. You can create more than one template e.g. one for researchers and one for PhD students. Your template will be presented to users within your organisation when no funder templates want to add questions to funder templates use the 'customise template' options below.

Own Templates **Customisable Templates**

Customizable Templates

All (1) Published (0) Unpublished (1) Not customised (0)

| Template Name | Funder | Status | Edited Date | |
|--------------------|-----------------|-------------|-------------|---------|
| * Portage Template | Portage Network | Unpublished | 02-03-2021 | Actions |

- Plans
- Templates
- Guidance
- Organisation details
- Users
- Usage

Five **NEW** templates have been published in the 2.0 platform :

Templates

If you wish to add an organisational template for a Data Management Plan, use the 'create template' button. You can create more than one template if desired e.g. one for researchers and one for PhD students. Your template will be presented to users within your organisation when no funder templates apply. If you want to add questions to funder templates use the 'customise template' options below.

Own Templates Customisable Templates

Own Templates

All (14) **Published (6)** Unpublished (8)

| Template Name | Description | Status | Edited Date | |
|--------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-------------|----------|
| Portage Template | This is the generic DMP template for Portage. | Published | 02-03-2021 | Actions- |
| Portage Template for Advanced Research Computing | ARC provides researchers with digital technology, infrastructure and expertise to help them solve research problems that are either too large or too complex to undertake by other means. It includes access to both computational and storage resources, such as multi-core and many-core high performance computing (HPC or supercomputers) systems, distributed high-throughput computing (HTC) environments, large-scale data analysis frameworks (e.g., Hadoop, Spark), visualization and data analysis systems, large-memory systems, data storage, and cloud systems. This template is intended for researchers whose research cannot be conducted on a traditional computer but has to rely on one or more of the advanced research computing resources mentioned above. ARC-based research occurs in a wide range of fields including genomics, molecular dynamics, bioinformatics, neuroscience, biochemistry, quantum chemistry, structural mechanics, astrophysics, energy economics, climate change, machine learning, artificial intelligence, and the humanities. | Published | 03-03-2021 | Actions- |
| Portage Template for Arts-Based Research | This template will assist you in creating a data management plan for arts-based research (ABR). It is intended for researchers and artists who use artistic processes as research methods (i.e., arts-based methods). ABR is used across disciplines and encompasses diverse understandings of the arts, research, and how they intersect. In this template, ABR is an umbrella term for all the ways the arts are adapted to answer | Published | 03-03-2021 | Actions- |

NEW templates can be used to create new plans with Portage Network selected as organisation:

The screenshot shows the 'DMP ASSISTANT' web interface. At the top, there is a navigation bar with 'My Dashboard', 'Create plans', 'Reference', and 'Help'. The user is logged in as 'Robyn Nicholson'. The page title is 'Portage Network'.

Create a new plan

Before you get started, we need some information about your research project to set you up with the best DMP template for your needs.

*** What research project are you planning?**

Test for 'Support Your Research with DMP Assistant 2.0!' mock project for testing, practice, or educational purposes

*** Select the primary research organisation**

Portage Network - or - No research organisation associated with this plan or my research organisation is not listed

Which DMP template would you like to use?

We found multiple DMP templates corresponding to your funder.

- ✓ Portage Template
- Portage Template
- Portage Template for Advanced Research Computing
- Portage Template for Arts-Based Research
- Portage Template for Interdisciplinary Health Software/Technology Development
- Portage Template for Mixed Methods (Surveys & Qualitative Research)
- Portage Template for Qualitative Health Sciences Research

At the bottom, there are links for 'Privacy statement' and 'GitHub'.

Local admin can edit their organisation's details ...

The screenshot shows the DMP Assistant web interface. The top navigation bar includes the DMP Assistant logo, navigation links (My Dashboard, Create plans, Reference, Help), and user information (Language, Robyn Nicholson). A red box highlights the 'portage' logo and contact information (portagenetwork.ca, Support) in the top navigation bar. A red arrow points from the top navigation bar to the 'Organisation details' menu item in the right-hand navigation menu.

Organisation details

Profile information | Request feedback | Schools/Departments | **Organisation details** | Users | Usage

* **Organisation full name**

Portage Network

* **Organisation abbreviated name**

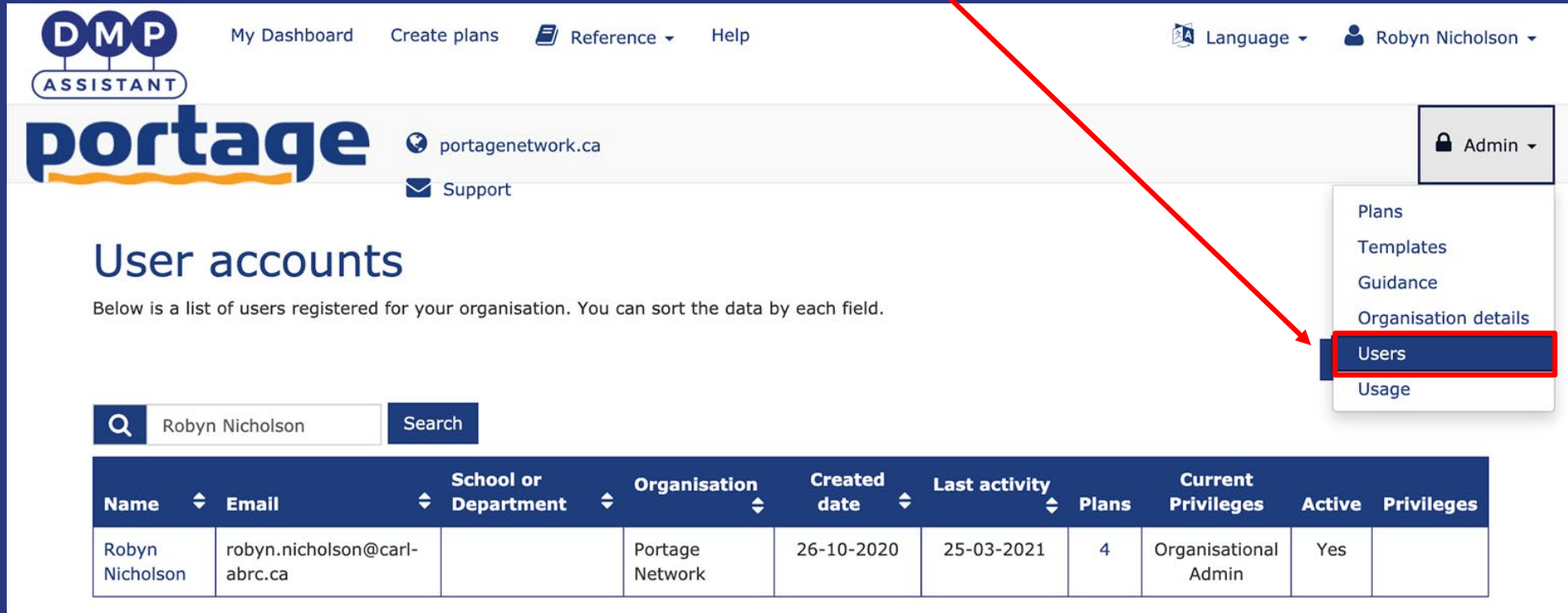
Portage

Organization logo

portage

Remove logo - or - No file chosen

Local admin can also view the users at their institution:



The screenshot shows the Portage Assistant DMP interface. At the top, there is a navigation bar with 'My Dashboard', 'Create plans', 'Reference', and 'Help'. On the right, there are 'Language' and 'Robyn Nicholson' user options. Below this is the 'portage' logo and 'portagenetwork.ca' with a 'Support' link. A red arrow points from the top text to the 'Users' option in the 'Admin' dropdown menu. The main heading is 'User accounts' with a subtext: 'Below is a list of users registered for your organisation. You can sort the data by each field.' Below this is a search bar containing 'Robyn Nicholson' and a 'Search' button. At the bottom is a table of user accounts.

| Name | Email | School or Department | Organisation | Created date | Last activity | Plans | Current Privileges | Active | Privileges |
|-----------------|------------------------------|----------------------|-----------------|--------------|---------------|-------|----------------------|--------|------------|
| Robyn Nicholson | robyn.nicholson@carl-abrc.ca | | Portage Network | 26-10-2020 | 25-03-2021 | 4 | Organisational Admin | Yes | |

NEW Usage Statistics Dashboard

DMP ASSISTANT My Dashboard Create plans Reference Help Language Robyn Nicholson

portage portagenetwork.ca Support Admin

Usage statistics

2193 Total users 1862 Total plans

csv download field separator: , Download

Plans
Templates
Guidance
Organisation details
Users
Usage

Statistics on your Users

The graphs display new users and plans for your organisation over the past year. You can download a CSV report for each graph.

* Move the mouse pointer over the bars of a chart to see numbers.

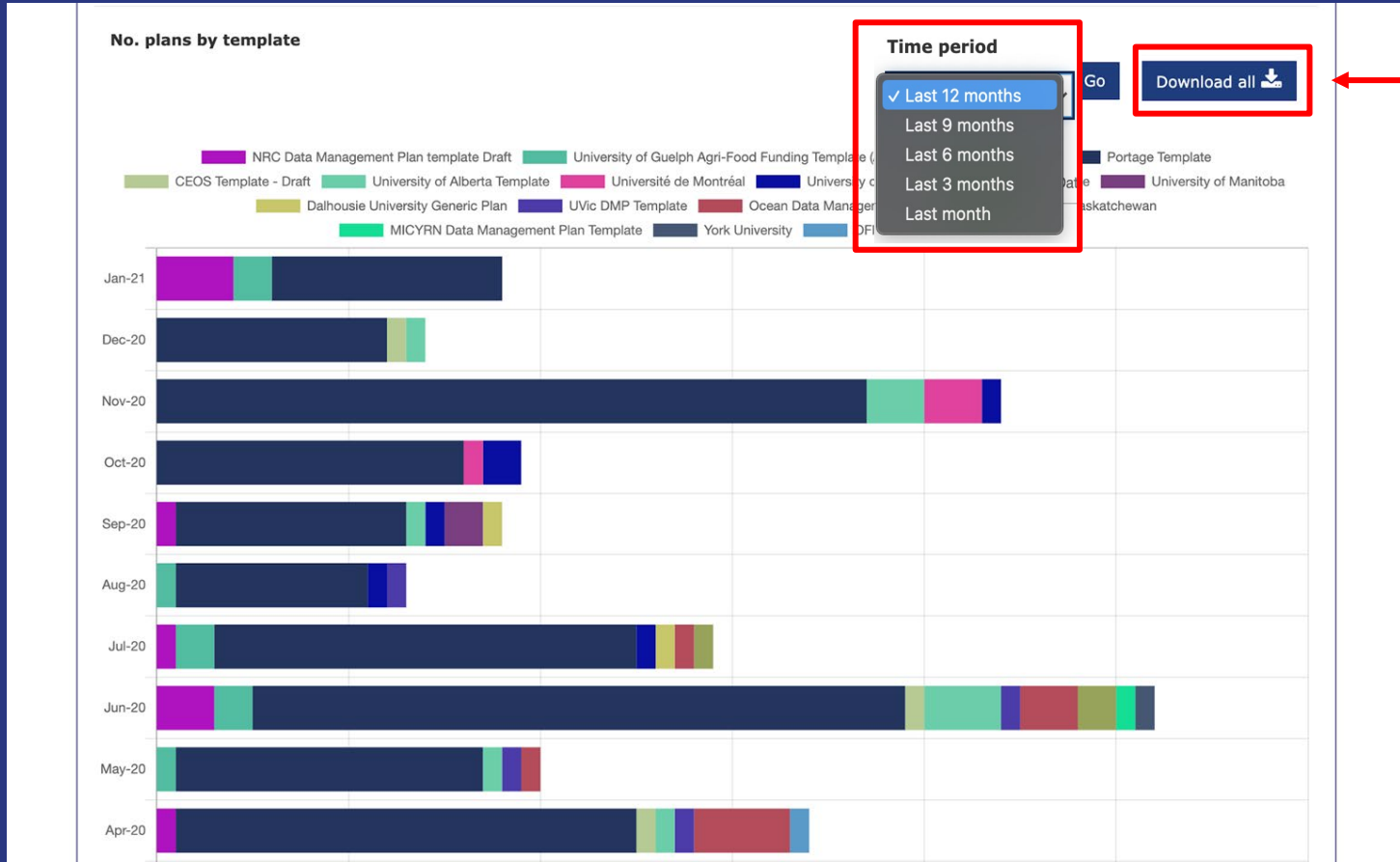
No. users joined during last year Download

| Month | No. users joined |
|--------|------------------|
| Mar-20 | 24 |
| Apr-20 | 29 |
| May-20 | 39 |
| Jun-20 | 66 |
| Jul-20 | 39 |
| Aug-20 | 28 |
| Sep-20 | 25 |
| Oct-20 | 38 |
| Nov-20 | 63 |
| Dec-20 | 28 |
| Jan-21 | 33 |

No. plans during last year Download

| Month | No. plans |
|--------|-----------|
| Mar-20 | 27 |
| Apr-20 | 34 |
| May-20 | 20 |
| Jun-20 | 52 |
| Jul-20 | 29 |
| Aug-20 | 13 |
| Sep-20 | 18 |
| Oct-20 | 19 |
| Nov-20 | 44 |
| Dec-20 | 14 |
| Jan-21 | 18 |

Administrators can view template usage by number of plans:



Administrators can also run their own custom searches of their usage statistics ...

Statistics on your Templates +

Use the filters to run organisational usage statistics for a custom date range.

Run your own filter

| | | | | |
|----------------------------------|---------------------------------|-------------------------------|----------------------------------------|-----------|
| Topic ✓ Users Plans | Start date yyyy-mm-dc | End date yyyy-mm-dc | Organisation Portage Network | Go |
|----------------------------------|---------------------------------|-------------------------------|----------------------------------------|-----------|

... by both Users and Plans.



portage



**UNIVERSITY OF ALBERTA
LIBRARY**



Looking Ahead

The DMP Assistant Steering Committee provides essential guidance, support and direction, including **new features** such as:

- **API Integration** with other systems (e.g., grants, ethics)
- **Reviewing & Evaluating** DMPs
- Building a **DMP Repository** with DMP Assistant integration
- **DMP Versioning**
- Leveraging the power & potential of **PIDs**
- Improving machine-actionability > **maDMPs**

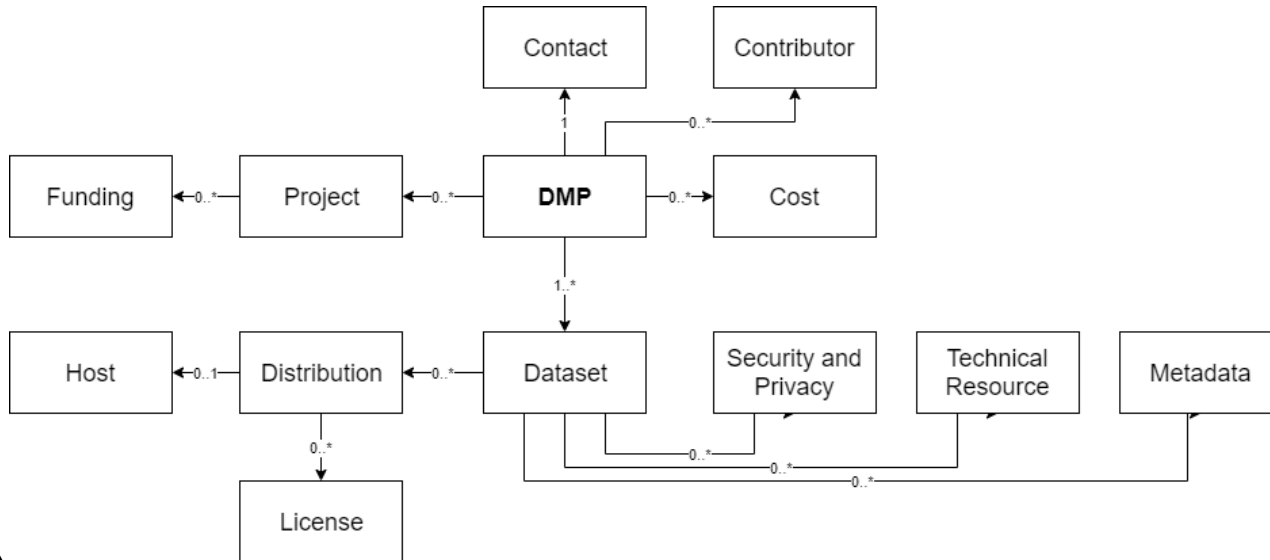
<https://portagenetwork.ca/network-of-experts/dmp-expert-group/>

Machine Actionable DMPs

Free -form or “narrative”
text documents



Metadata -rich machine -
actionable DMPs



Machine Actionable DMPs



DMP Common Standards WG

Taxonomy:

Posts | Create Wiki index | Events | Repository | Outputs | Case Statements | Plenaries | Members | create new content

Group Status: WGs Maintaining deliverables (maintenance group) Join Group

Status: Recognised & Endorsed
Chair (s): Paul Walk, Peter Neish, Tomasz Miksa
Secretariat Liaison: enquiries[at]rd-alliance.org
TAB Liaison: Isabelle Persell

The need for establishing this working group was articulated during the 9th plenary meeting in Barcelona during the Active DMPs IG session. The discussion was framed by a white paper by Simms et al. on machine-actionable data management plans (DMPs). The white paper is based on outputs from the IDCC workshop held in Edinburgh in 2017 that gathered almost 50 participants from Africa, America, Australia, and Europe. It describes eight community use cases which articulate consensus about the need for a common standard for machine-actionable DMPs (where machine actionable is defined as "information that is structured in a consistent way so that machines, or computers, can be programmed against the structure")

The specific focus of this working group is on developing common information model and specifying access mechanisms that make DMPs machine-actionable. The outputs of this working group will help in making systems interoperable and will allow for automatic exchange, integration, and validation of information provided in DMPs, for example, by checking whether a provided PID links to an existing dataset, if hashes of files match to their provenance traces, or whether a license was specified. The common information models are NOT intended to be prescriptive templates or questionnaires, but to provide re-usable ways of representing machine-actionable information on themes covered by DMPs.

DMP Roadmap Around the World!



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Thank you!

Questions?

Contact:

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assistant.portagenetwork.ca

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