RDMO quick start guide for users

Who is this guide intended for?

This guide is intended for anyone who wants to create a (research) data management plan. It doesn’t matter if you want to do this as part of an application or for other reasons.

Prerequisites

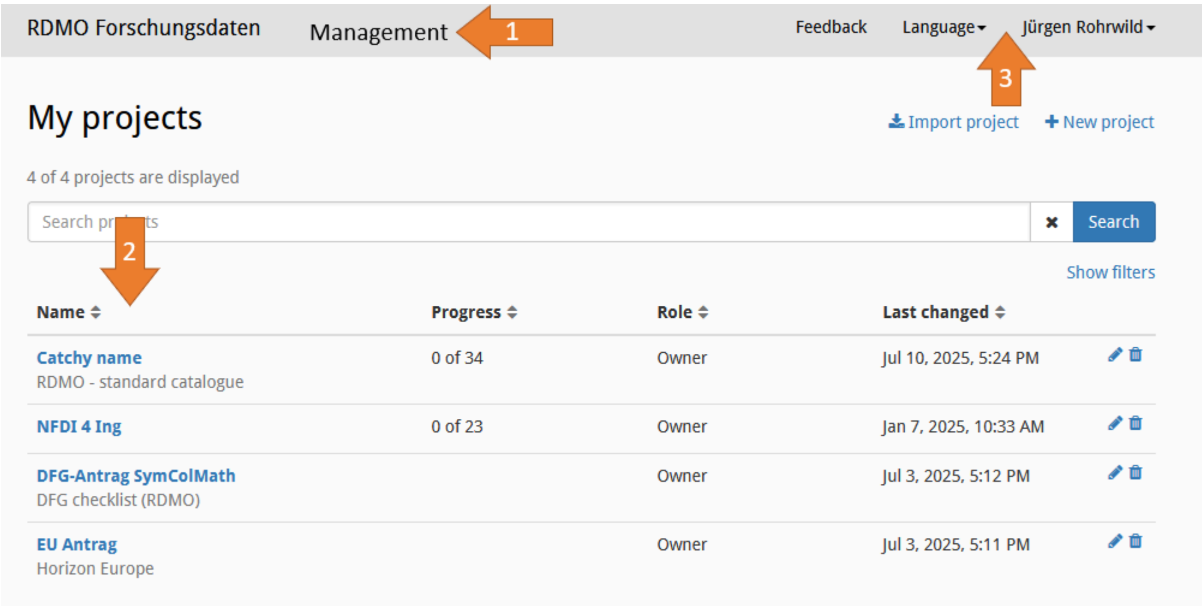
The web-based software RDMO is available free of charge on GitHub. However, it must be installed on a server and the accounts must be managed centrally. Ideally, your institute will have its own RDMO instance to which you can log in using your institute access details. If necessary, contact the data management department at your institute for more information.

Log in

First, go to the website of your RDMO instance. Alternatively you can use the RDMO instance of forschungsdaten.info for demonstration purposes: https://rdmo.forschungsdaten.info/. There, you can log in via Helmholz ID with your institute account or via your GitHub, ORCID or Google account.
If you use the RDMO instance of your institution, other options (Shibboleth, sign-up, ...) may be available.

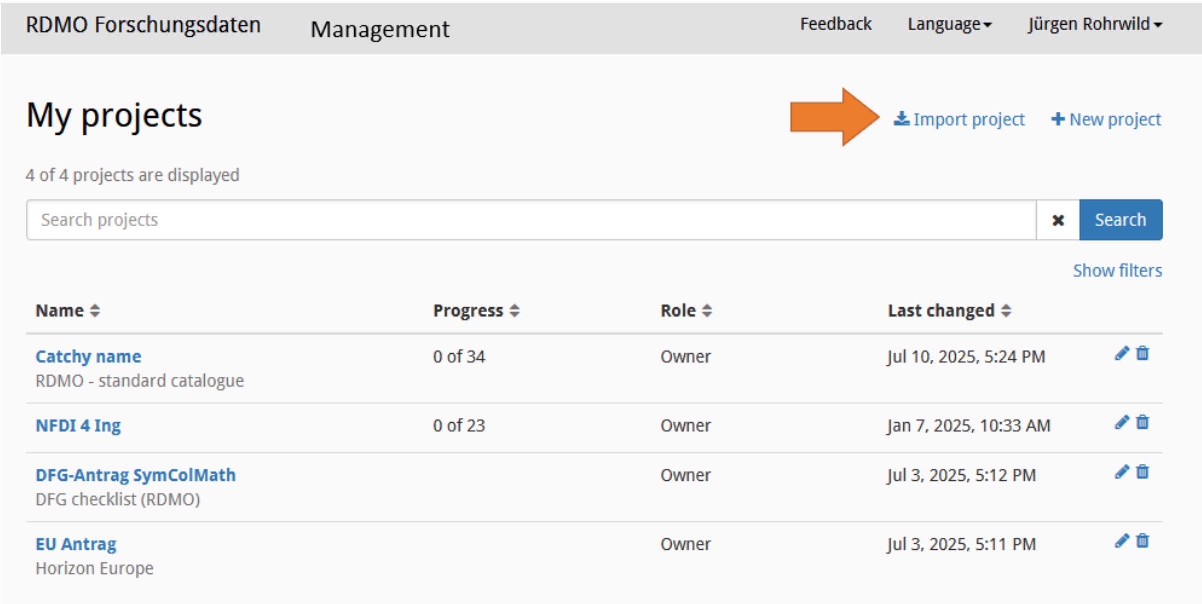
Overview: the start page

After successfully logging in, you will be taken to your start page, which provides an overview of all the available options:



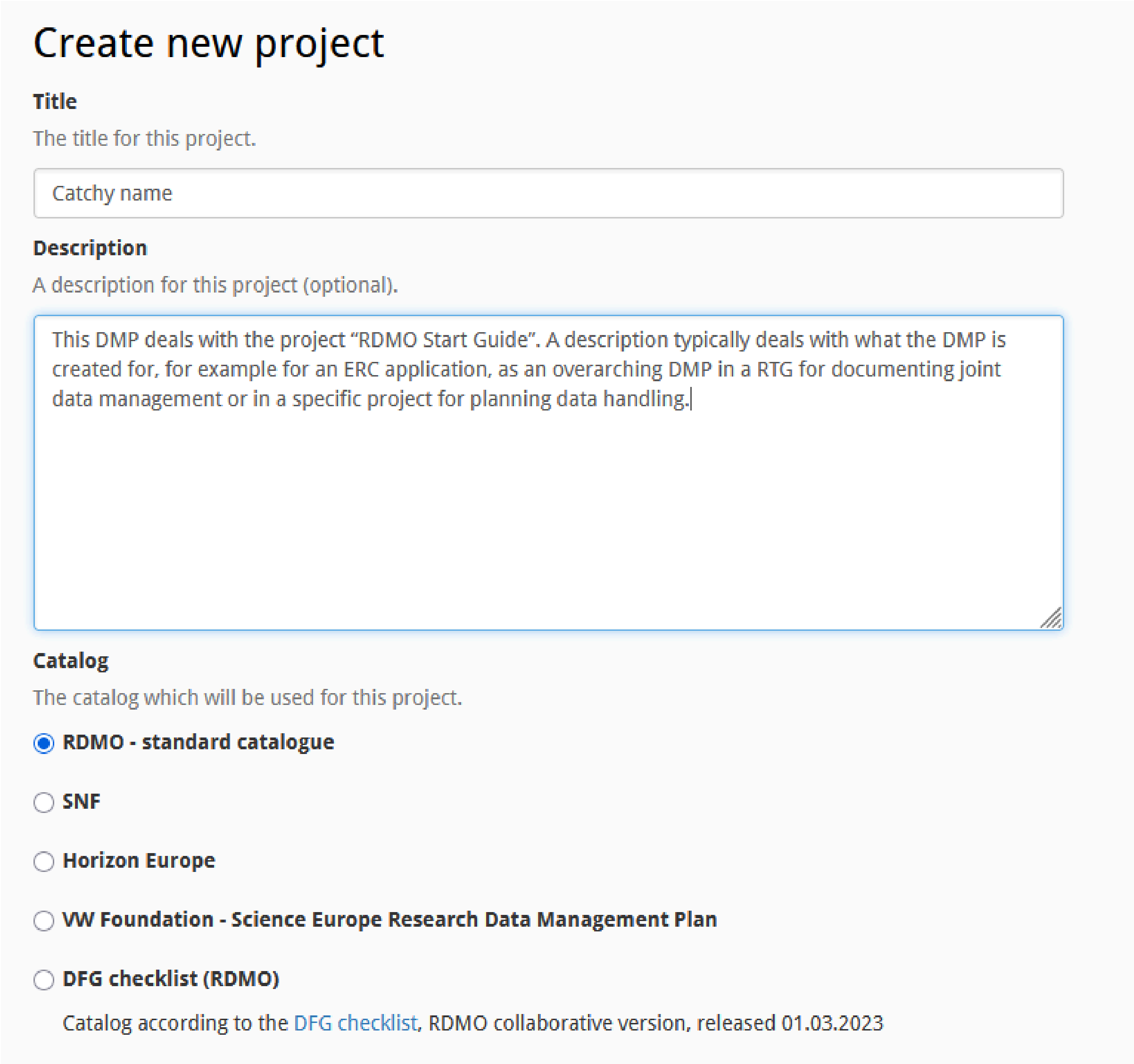
1. If you have the necessary permissions, then you can edit question catalogues and their underlying domain through the management menu. However, this is not necessary for creating a data management plan. If you do not have the necessary permissions, “Management” will not be displayed in the navigation bar.
2. Under “My projects” you will find a list of all the data management plans that you have created yourself and those to which you have been added. It also shows when the project was created. Initially, this overview will be empty. You can edit or delete the plans here using the icons on the right-hand side of the respective line. However, please note that deleting a project cannot be undone!
3. At the top right you can select the language (usually German or English). Your name is also displayed and clicking on the small arrow opens a menu with the following options:
    a. About RDMO (information about the current version)
    b. Delete profile (optional)
    c. Display of the start help texts
    d. Log out.

Create a new Plan



Once you have logged in and are on the start page, you will see the option to create a “New project” or import a project from an XML file (usually from an export from an RDMO instance) on the right. This will generate a new data management plan. If you create a new project, you will be prompted to enter the following information:

- Title: Give the new plan a catchy name.
- Description: Enter a description of your data management plan if necessary, to explain its purpose.
- Catalog: Select the appropriate catalogue from the available ones. You can also change the assigned catalogue later. The images below show the RDMO standard catalogue in the RDMO instance of forschungsdaten.info.



Answering questions

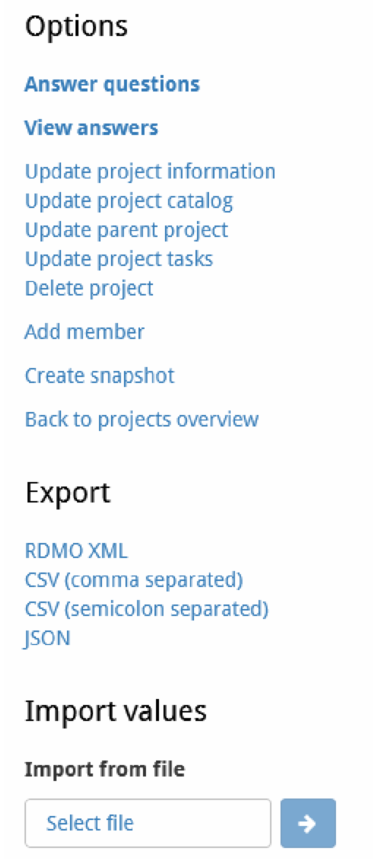
Once you have created a new project or plan, you will see an overview of it:

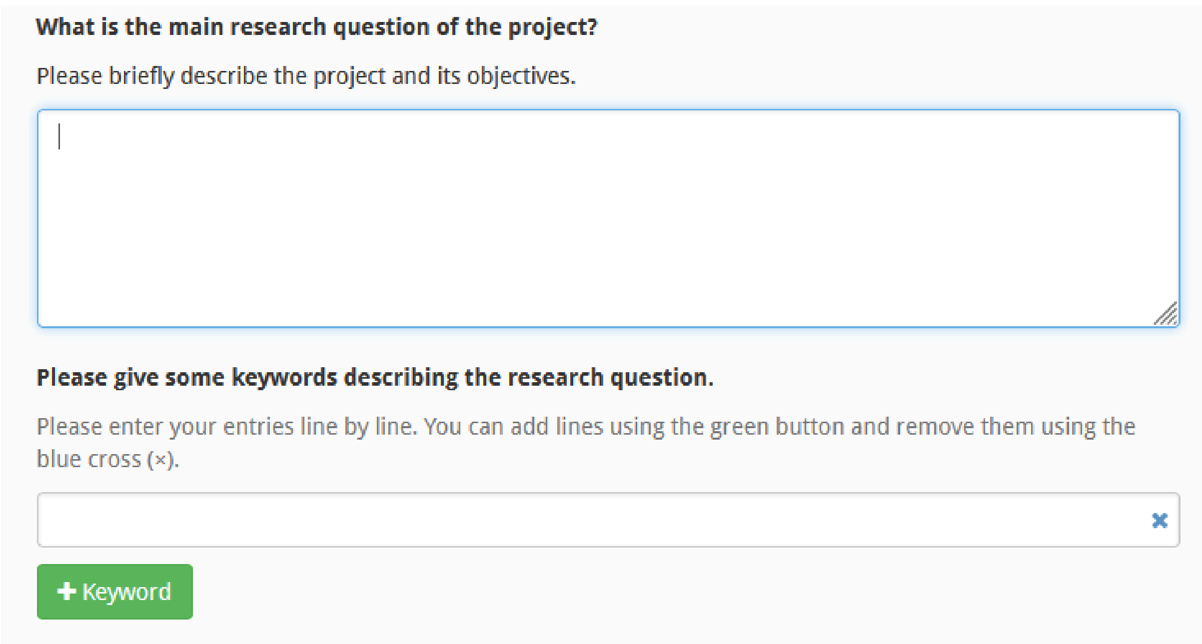
- Title:
- Description:
- Tasks: These are tasks created by the answers in the questionnaire. For example, you might need to contact the data protection officer.
- Memberships: Here you can see who has access to the plan and their "role", i.e. possibly restricted rights.
- Views: An overview of all existing views, that map your answers to templates from sponsors, etc.
- Snapshots: An overview of the snapshots you have created (i.e. intermediate copies of your given answers), so that you can revert to an older version if necessary.

On the right-hand side you will find the “Options” overview. Here, you can change project information, such as the title and description. You can also permanently delete the project, create snapshots and add members.

The export and import options can be found underneath “Options”. These two functionalities are not covered in these instructions, as they are generally not necessary for getting started.

Click on “Answer questions” under “Options”. You will then be automatically directed to the first set of questions in the question catalogue.





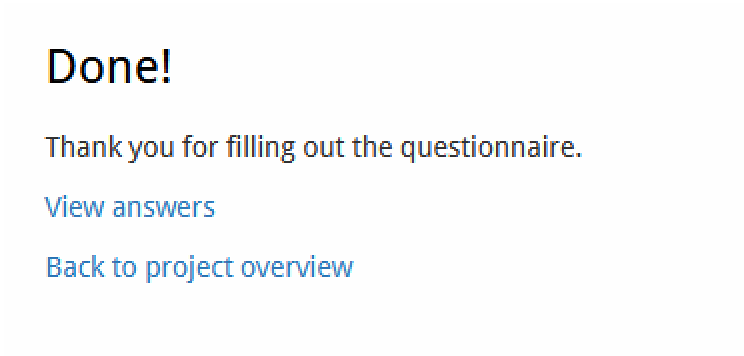
Many questions can be answered using the free text field. To allow for more space for detailed answers, click on the hatched triangle in the bottom right-hand corner and drag the text field to enlarge it.
In the above example, you are asked for keywords. By clicking on the green “+ Keyword” button, you can enter a further answer in each case. (The generic RDMO questionnaire does not have a controlled vocabulary for keywords).

At the end of each page of questions, you will see the following buttons:

- Back: This takes you back to the questions on the previous page.
- Proceed: This button redirects you to the next page of questions.

Displaying and exporting answers

Once you have gone through all the question pages, the following appears:



If you click on “View answers”, you can export your answers and the corresponding questions in a variety of formats: PDF, Rich Text Format, OpenOffice, Microsoft Office, HTML, Markdown, MediaWiki and LaTeX.

Creating a snapshot

If you want to revert to an earlier version after making numerous changes, you must have created a so-called snapshot. Your answers are saved each time you click on “Continue”, but you cannot return to previous versions. However, this is made possible by creating snapshots. To do this, click on “Create snapshot” in the menu bar on the right-hand side of your project overview, then give the snapshot a title and, if you wish, a description. The snapshot will then be listed in the project overview with the title you gave it. Resetting to a snapshot cannot be undone.

Add members

If you want others to be able to view or edit your data management plan, you can add them as members. To do this, click on “Add member” in the menu on the right of your project

overview and enter the username or email address of the person in question. You must also specify the role that this person should have.
Role concept:

- Owner: When you create a new project, you automatically become the owner of this project. However, you can also appoint other members as owners. Owners have all permissions, including the ability to delete a project.
- Manager: A manager cannot delete projects, but has all other permissions, such as creating snapshots or making changes.
- Author: An author has read and write rights.
- Guest: has read-only rights.

Members of your projects are displayed at the bottom of the project overview and can be removed. Members should not work on the plan simultaneously to avoid overwriting entries.