

Manual: RDMO – Quick Guide

Getting Started with RDMO: A Quick Guide for Researchers

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What is a data management plan (DMP)?

A Data Management Plan (DMP) is a structured document created at the start of a project. It outlines how research data, including codes, surveys, data models, publications, and other research outputs, will be managed throughout the research data lifecycle and preserved after the project concludes. DMPs are often a mandatory requirement for funding applications, especially from government agencies.

Best Practice: Research Data Management (RDM) is most effective when it is integrated into the planning phase of a project, ensuring that workflows are well-defined from the start.

- **Define Goals Early:** Before you begin filling out your DMP, identify your project’s data-related goals, such as sharing, preservation, and compliance with funder requirements.
- **Engage Stakeholders:** Include input from researchers, IT staff, legal advisors, and data stewards during the planning phase to ensure all perspectives are covered.

What is RDMO?

RDMO (Research Data Management Organiser) is a web-based, open source software designed to create DMPs for research projects. It supports researchers and institutions in managing research data effectively throughout the research data lifecycle. It facilitates data management planning, sharing, and compliance with funding agency requirements.

Navigate to RDMO: <https://rdmorganiser.github.io/>

Supported languages: English, German, French, Italian, and Spanish

RDMO can be accessed in two ways:

Demo instance – A ready-to-use RDMO instance where the researchers can login and create their DMPs. Usually, this version is used for training purposes, however, it can also be used for active RDM planning.

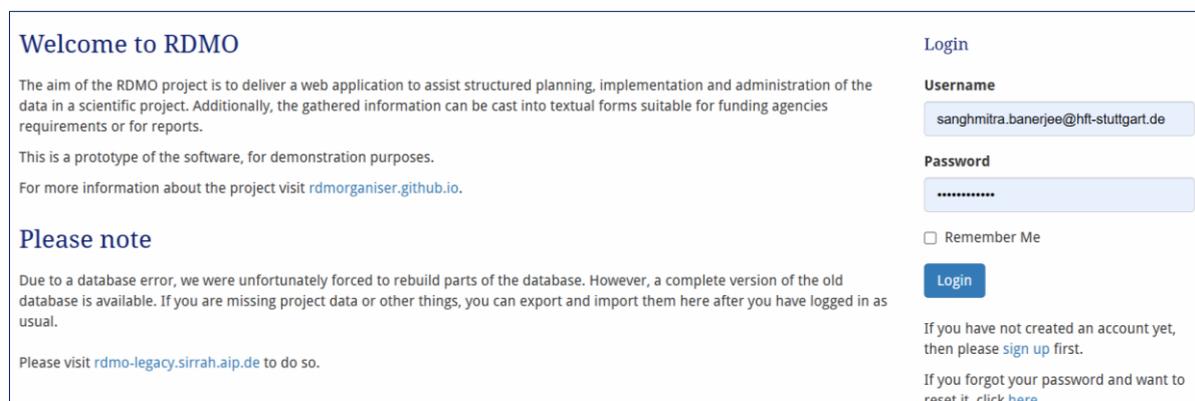
University instance – This version is centrally configured by the universities' IT teams to align with the universities' policies, guidelines, and workflows. This version allows customization based on university needs, such as allowing signing in using ORCID.

This is a comprehensive step-by-step guide to help you navigate and use the Demo instance of RDMO, efficiently.

Step 1: Register and login at RDMO

If you are new to RDMO, register using “sign up” option. If you are a registered user, login using the registered credentials.

Best Practice: RDMO offers a collaborative environment. Therefore, it is advisable to register using your institutional credentials.



The screenshot shows the RDMO login page. On the left, there is a 'Welcome to RDMO' section with introductory text and a 'Please note' section regarding a database error. On the right, there is a 'Login' form with fields for 'Username' (containing 'sanghmitra.banerjee@hft-stuttgart.de') and 'Password' (masked with dots). Below the password field is a 'Remember Me' checkbox and a 'Login' button. At the bottom right, there are instructions for new users and a link for password reset.

Figure 1: Login page of RDMO

Step 2: Navigate through personal dashboard

Dashboard overview:

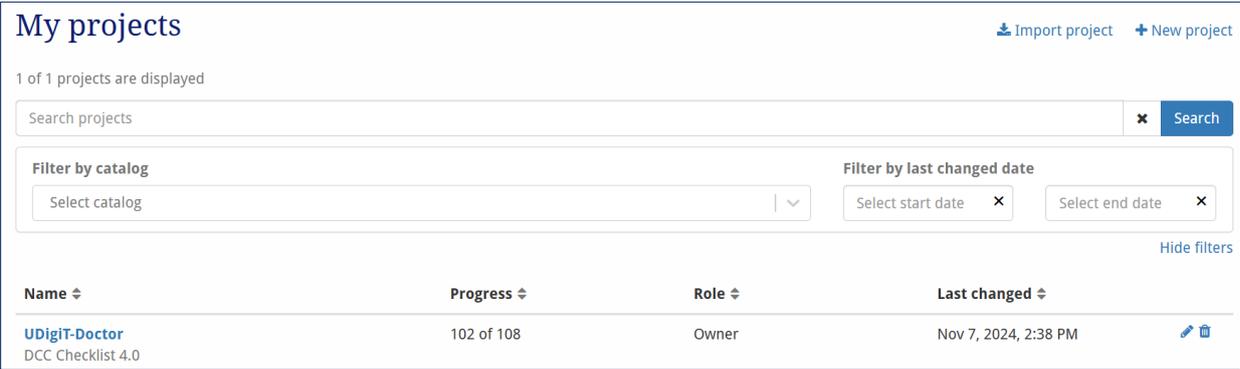
- After successfully logging in, you will be directed to your dashboard, titled “My Projects” (Figure 2). This page provides an overview of all your DMPs that you have created or have access to as a team member.
- You can view your DMPs organized by Name, Role, and the Last Changed (date of the most recent modifications).

Managing Existing DMPs:

- You can edit or delete any existing DMPs using the icons   located on the right corner of each DMP.
- If you are managing multiple projects, you can use the search bar or filters (by catalogue or last changed date) to quickly locate a specific DMP.

Creating or Importing DMPs:

The dashboard also allows you to either import an existing project or create a new project (i.e., a new DMP) using the “Import project” and “New project” options, respectively, given on the top right corner.



Name ↕	Progress ↕	Role ↕	Last changed ↕
UDigit-Doctor DCC Checklist 4.0	102 of 108	Owner	Nov 7, 2024, 2:38 PM

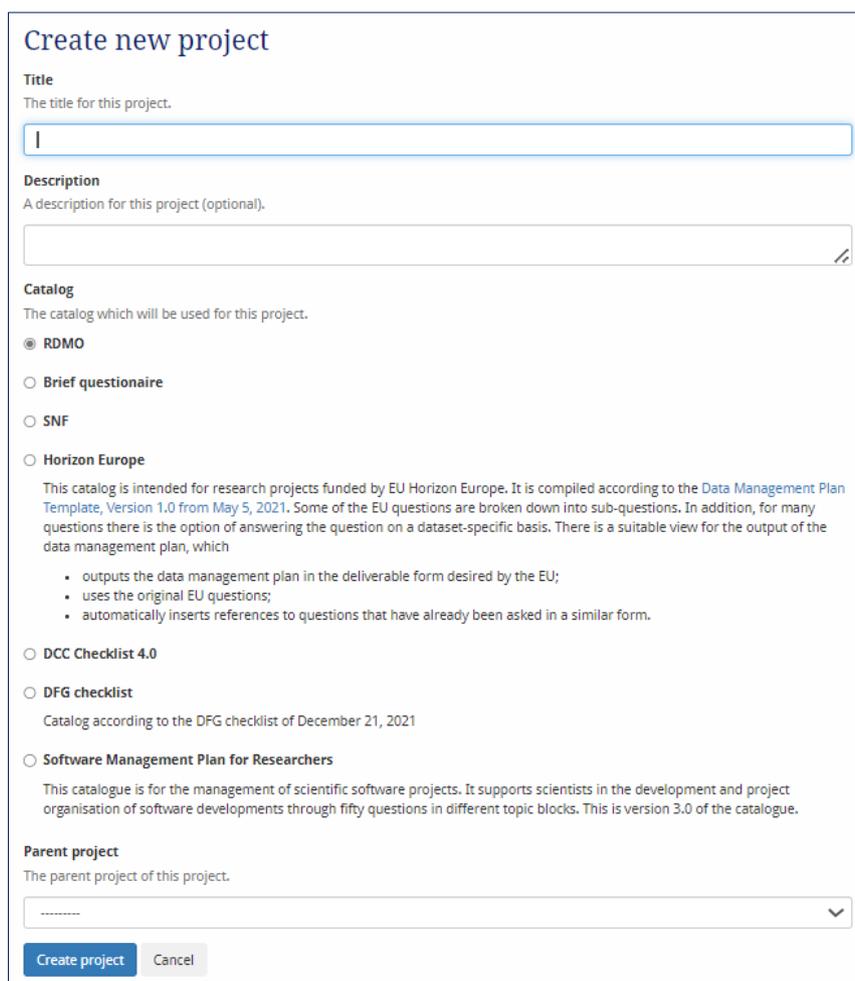
Figure 2: Starting dashboard

Step 3: Create a new DMP

Each DMP created on RDMO is called a “Project”. Therefore, to create a new DMP, click on “New project” option on the top right corner of the starting dashboard or DMP overview page.

To create a new DMP, you will need to provide the following details:

- ✂ Title: Enter a clear and descriptive name for your new DMP.
- ✂ Description (optional): Add any additional information to explain the purpose or context of your DMP, if needed.
- ✂ Catalogue: RDMO uses a question-and-answer model to guide the creation of a DMP. It offers a variety of catalogues with defined set of questions, tailored to meet your funding agency's or institutional requirements. For example: DFG Checklist is a catalogue based on the DFG checklist, updated as of December 21, 2021. These catalogues serve as the foundation of your DMP by providing a structured questionnaire that addresses various aspects of data management. If needed, the catalogues can be changed at a later stage as required.
- ✂ Parent Project (optional): If your project is part of a larger hierarchical structure, you can link your DMP to a parent project. This connection allows you to automatically transfer relevant information to or from the parent project.



Create new project

Title
The title for this project.

Description
A description for this project (optional).

Catalog
The catalog which will be used for this project.

RDMO

Brief questionnaire

SNF

Horizon Europe

This catalog is intended for research projects funded by EU Horizon Europe. It is compiled according to the [Data Management Plan Template, Version 1.0 from May 5, 2021](#). Some of the EU questions are broken down into sub-questions. In addition, for many questions there is the option of answering the question on a dataset-specific basis. There is a suitable view for the output of the data management plan, which

- outputs the data management plan in the deliverable form desired by the EU;
- uses the original EU questions;
- automatically inserts references to questions that have already been asked in a similar form.

DCC Checklist 4.0

DFG checklist
Catalog according to the DFG checklist of December 21, 2021

Software Management Plan for Researchers

This catalogue is for the management of scientific software projects. It supports scientists in the development and project organisation of software developments through fifty questions in different topic blocks. This is version 3.0 of the catalogue.

Parent project
The parent project of this project.

Figure 3: Creating a new project (or DMP)

Step 4: Navigate through the newly created project page

As you create a new project, you will be directed to the Project page, where you will find the following information:

Best Practice: Using RDMO effectively requires a strategic approach that ensures comprehensive and compliant research data management. If you are new to RDMO, it is advisable to navigate through this page and familiarize yourself with the available options, before you start answering the questions for creating a DMP.

- ✂ Title, description, and catalogue assigned in the previous step.
- ✂ Tasks: Certain questions permit responses such as "Not yet" or "Unclear". In such cases, RDMO may create a task to remind you that further action is required.
- ✂ Views: RDMO provides various templates, known as Views, to display your answers to the questions defined in the catalogue (selected in Step 3). For example, answers to the questionnaire in the RDMO catalogue can be viewed in more than one templates, such as in Horizon Europe template, DMPTool template or SNF Template, as required. Currently, the RDMO offers 9 different views, catering to the requirements of both German and European funders.

The views can be updated using the "Update project views" link in the "Options" panel on the right side of the page.

The screenshot shows the RDMO interface with three main sections: 'Options', 'Update project views', and 'Views'. The 'Options' panel on the left has a list of actions, with 'Update project views' highlighted in a red box. An arrow points from this option to the 'Update project views' panel in the center. This panel contains a list of view templates with checkboxes, where 'DMPTool template', 'Horizon Europe', and 'SNF Template' are checked. Another arrow points from this panel to the 'Views' panel on the right. The 'Views' panel shows a table with columns 'View' and 'Description'. The table contains three rows: 'DMPTool template', 'Horizon Europe', and 'SNF Template', each with a corresponding description and a blue edit icon.

View	Description
DMPTool template	Template from DMPTool, based on "NSF-GEN: Generic", online: https://dmptool.org
Horizon Europe	View (export template) for the funding framework program "Horizon Europe" (2021-2027) of the European Commission (version 1.0, 5th May 2021)
SNF Template	DMP of the SNF (Switzerland)

Figure 4: An overview of project „Views“

- ✂ Members and Invites: You are the owner of the project. You can invite a new member to create, update, delete, review or view the project. The owner needs either the email

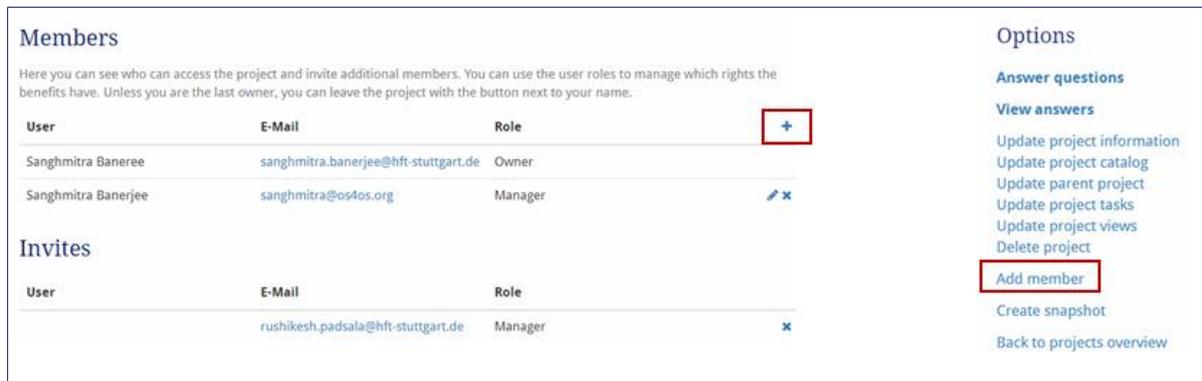
address or the username of the group members to invite them for contributing in the DMP. One of the following roles can be assigned to the invitees:

- ✂ Guest - can only read the DMP,
- ✂ Author - can answer the questions and therefore, holds the right to add new text and edit answers in the DMP. However, the author is prohibited from other functionalities such as, updating views, creating snapshots, inviting new member or deleting the project.
- ✂ Manager - can create snapshots, export the project, import values, and update the project settings, same as owner. However, a manager can't invite new members or delete the project.
- ✂ Owner - have access to all the features of RDMO.

All the members you invite will be visible under “Invites” section, and those who accepted the invitation will be visible under “Members” section. There is always a possibility of changing the assigned roles of the invited members.

The member can either be added using the add button **+** present in the “Members” section or using the “Add member” link in the “Options” panel on the right side of the page.

Important: All participants of a DMP need to have an RDMO account.



User	E-Mail	Role	
Sanghmitra Baneree	sanghmitra.banerjee@hft-stuttgart.de	Owner	+
Sanghmitra Banerjee	sanghmitra@os4os.org	Manager	✂

User	E-Mail	Role	
	rushikesh.padsala@hft-stuttgart.de	Manager	✂

Options

- Answer questions
- View answers
- Update project information
- Update project catalog
- Update parent project
- Update project tasks
- Update project views
- Delete project
- Add member**
- Create snapshot
- Back to projects overview

Figure 5: Adding members in RDMO

Best Practice: RDM is a team effort. It is advisable to collaborate with the responsible team from the beginning of creating a DMP. Clearly assign roles to the team members, encourage feedbacks, and set deadlines for completing sections of the DMP to ensure the team stays on track.

✂ Snapshots: A snapshot is a version of your DMP that you can explicitly save. It generates a read-only copy of the current project. While the snapshot itself cannot be edited, you can revert the project to the exact state captured in any existing snapshot. This feature is useful for preserving the project's current state, such as documenting how your data management planning evolves over time. It is also helpful if you plan to make significant changes to your DMP and need a quick backup for reference.

The snapshot can either be created using the add button **+** present in the “Snapshots” section or using the “Create snapshot” link in the “Options” panel on the right side of the page.

Snapshot	Description	Created	
UDigit-Doctor_V6	testing catalogue change	Nov. 7, 2024, 11:24 a.m.	
UDigit-Doctor_V5	Updated the keywords for defining data	Nov. 7, 2024, 11:23 a.m.	
UDigit-Doctor_V4	Updated the project partner in this document	Nov. 7, 2024, 11:21 a.m.	

Options

- Answer questions
- View answers
- Update project information
- Update project catalog
- Update parent project
- Update project tasks
- Update project views
- Delete project
- Add member
- Create snapshot**
- Back to projects overview

Figure 4: Creating Snapshots in RDMO

Best Practice: Research projects evolve, and your DMP should reflect changes in scope, methods, or goals. Periodically revisit and revise your DMP as the project progresses. Create snapshots to track changes in your DMP for transparency. Incorporate regular updates based on funder feedback or emerging best practices in research data management.

All the options mentioned above can be edited at any stage using the edit icons located on the right corner of each option.

On the right side of this page, all the options for editing current project, such as updating project information, project catalogue, parent project, etc., can be found under “Options” panel. You can also delete your current project from here using “Delete project” link.

Important: Deleting a project is irreversible and cannot be undone.

Step 5: Answer questions

On the right side of the overview page for the newly created project, you will find the option “Answer questions”. This section contains the questionnaire generated based on the catalogue selected in Step 3.

You can choose to answer the questions sequentially using the “Proceed” button located in the bottom-right corner of each question section. Alternatively, you can navigate between different questionnaire categories using the “Navigation” pane on the right side of the page. This flexibility allows you to answer the questions at your convenience. Additionally, the right-hand pane provides an overview and tracks the progress of your project.

The sections that are answered completely, are marked with a check (✓) symbol, whereas the incomplete sections show the number of questions answered vs the total number of questions (see figure 7).

Note: It is not necessary to answer all the questions of a catalogue. However, as a best practice, it is advisable to answer as many questions as possible.

Figure 5: An overview of question-answer window from RDMO catalogue

Best Practice: Each question in RDMO contributes to a comprehensive understanding of your project’s data lifecycle. Provide detailed and precise answers to as many questions as possible to minimize ambiguity. Understand how answers to certain questions affect subsequent ones, ensuring consistency. Refer to institutional or funder guidelines when answering to ensure compliance.

Step 6: View and export answers

Once the questionnaire is completed, click on “View answers”. RDMO summarizes all the information about the project as given by you and your collaborators under “View answers”. You can then export all the questions and answers in the following file formats: PDF, Rich Text Format, Open Office, Microsoft Office, HTML, Markdown, mediawiki, and LaTeX.

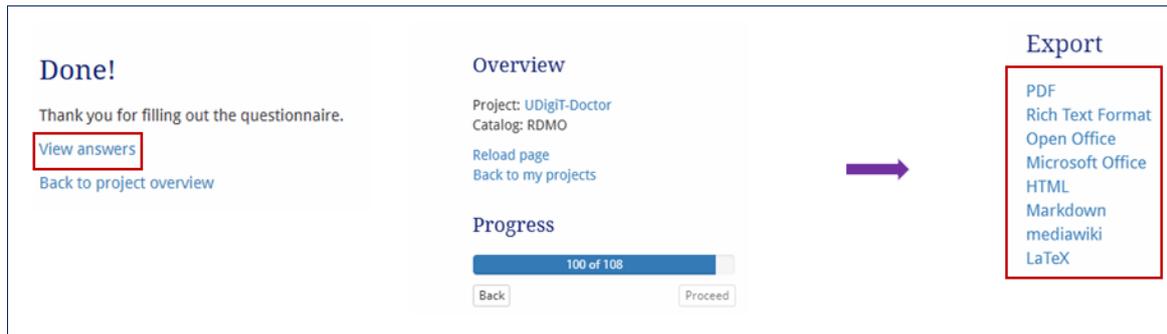


Figure 6: View and export options in RDMO

Best Practice: Effective communication of your DMP ensures transparency and facilitates stakeholder collaboration. Export plans in formats like PDF for presentations or submission to funders. Ensure the exported DMP aligns with the specific formatting and content guidelines of your funding agency.

General Best Practices of creating a DMP:

- ✘ Participate in workshops or resources on using RDMO and understanding data management principles.
- ✘ Advocate for integrating RDMO into the workflows of new projects at your institution.
- ✘ Compare your DMP against funder and institutional criteria to ensure completeness.
- ✘ Request input from data stewards, funders, or external reviewers to identify areas for improvement.
- ✘ Apply insights from completed projects to improve future DMPs.
- ✘ Answer as many questions as possible specifically those related to metadata and referencing, preparing data for long-term data stewardship, and ensuring data security and ethical compliance, among others.

Sources

Leibniz-Institut für Astrophysik Potsdam (AIP): <https://rdmo.aip.de/> [29.11.2024]

Ludwig-Maximilians-Universität München, Universitätsbibliothek (nn): https://rdmo.ub.uni-muenchen.de/doc/schnellstart_rdmo.pdf [29.11.2024]