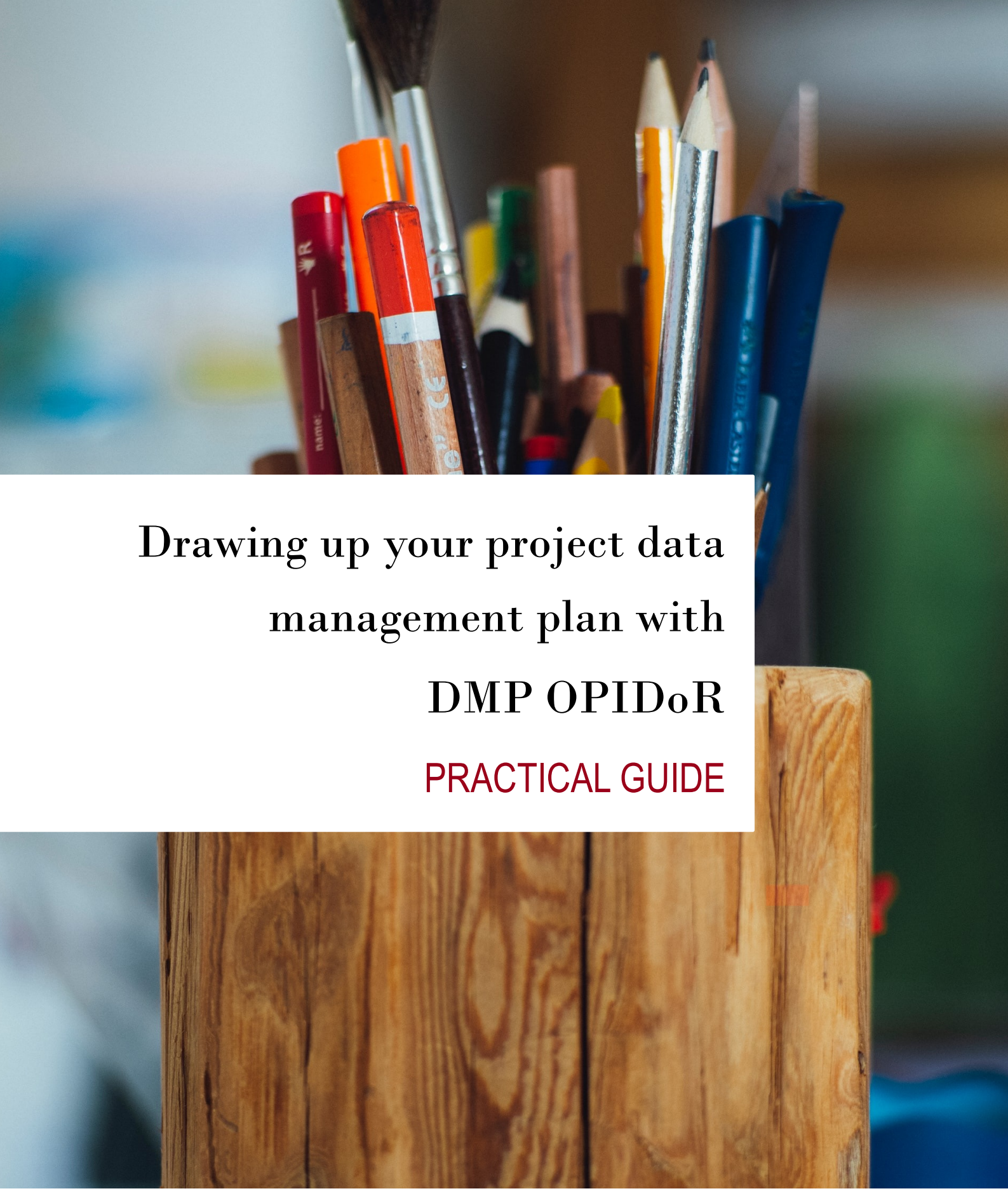

Drawing up your project data management plan with DMP OPIDoR

PRACTICAL GUIDE

CeRIS | INSTITUT PASTEUR

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1. Introduction

To help you in the drafting of your Data Management Plan (DMP), the CeRIS provides you with a **DMP template**, in French and English versions. This template consists of a set of questions organized in two parts:

- The **General information on data** part, which concerns all the data of the project.
- The **Datasets** part, which allows you to describe - for each dataset - all the stages of its life cycle.

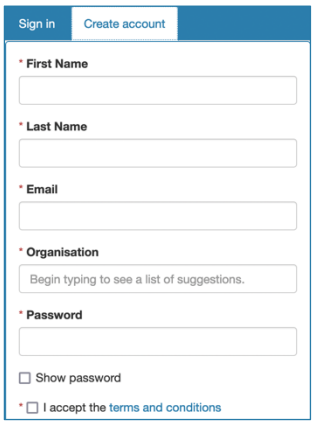
You can answer the questions of the Institut Pasteur's DMP template with the **DMP OPIDoR** tool. Using this tool allows you to:

- Work with others on the DMP, including with your French or foreign partners
- Easily view tips and examples of answers associated with each question
- Easily update your DMP during the project
- Export your DMP in PDF or Word format

DMP OPIDoR has the advantage of a simple interface because the tool is specifically dedicated to the drafting of DMPs. Its only disadvantage is that the DMP created using DMP OPIDoR will not be stored on a server at the Institut Pasteur. If your DMP contains confidential information (which should not be the case in the majority of cases), we advise you to use a Word document.

The purpose of this document is to guide you in the use of DMP OPIDoR for writing your DMP.

2. Login to your DMP OPIDoR account

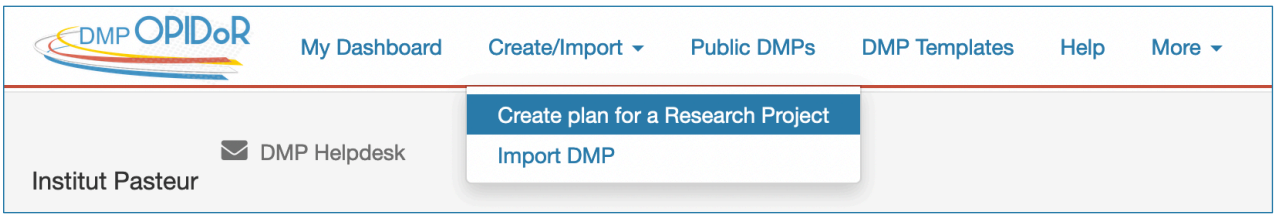


- Go to the following URL in your browser: https://dmp.opidor.fr/
- Select the English language at the top right of your screen
- Click on the **Create account** tab in the form on the right
- Fill in the requested information and then click on **Create account**
- Selecting "Institut Pasteur" in the list of organisations allows you to link your account to your institutional account

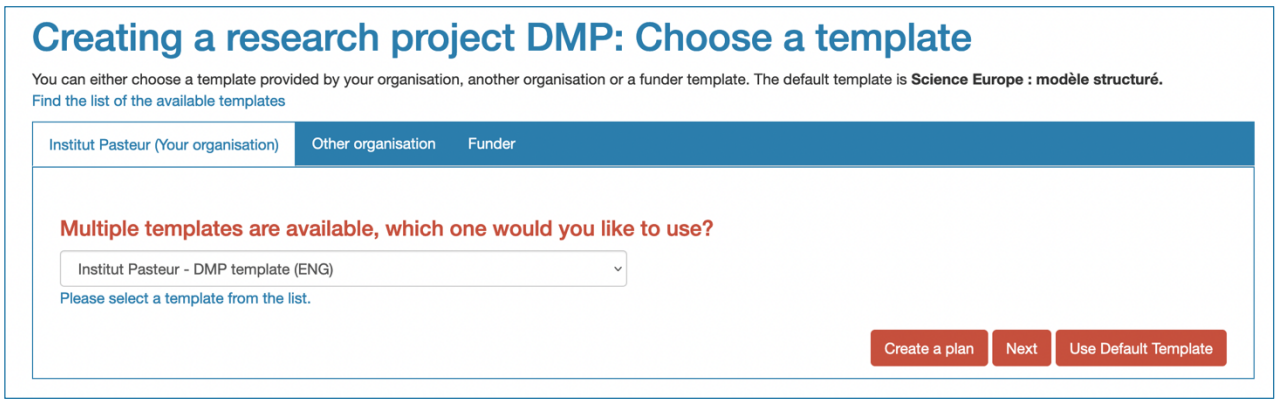
You can now sign in with the institutional access (with your Pasteur Id) or with the individual access (by entering your email and the password you just created).

3. Drawing up a DMP using the template of the Institut Pasteur

- Click **Create/Import** at the top of your DMP OPIDoR account homepage and then **Create plan for a Research Project**



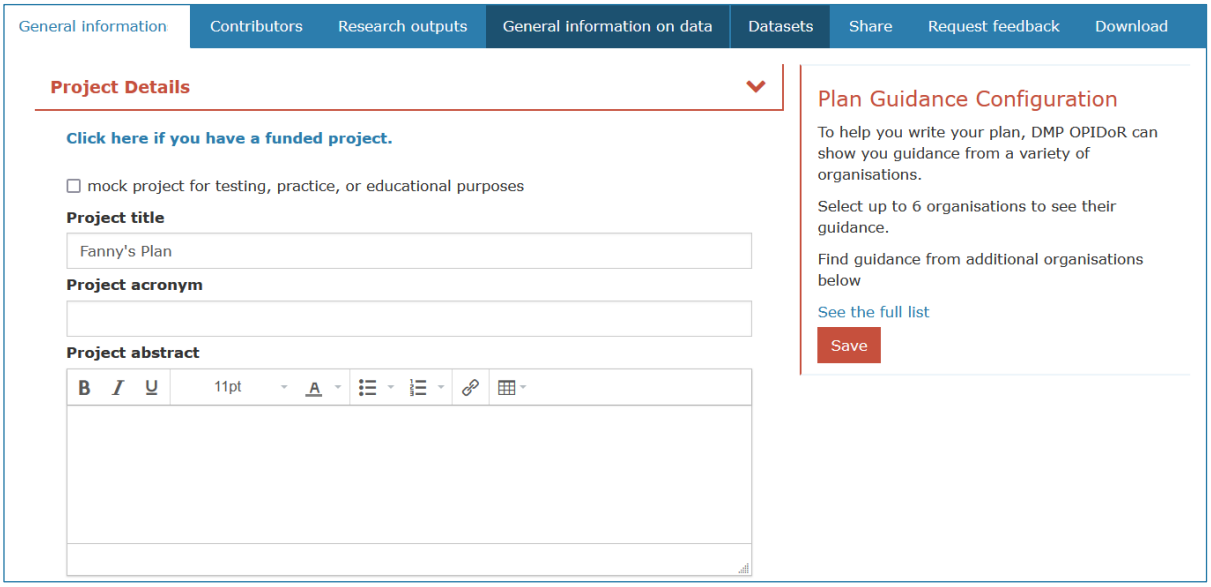
- Indicate the title of your research project
- DMP OPIDoR immediately offers you to use the template of the Institut Pasteur. Choose the English version
- Click on **Create a plan**



N.B. The Institut Pasteur's DMP template is not appropriate for planning the management of a software or a workflow. Instead, choose a Software Management Plan template, for example the PRESOFT template, available by searching for "PRESOFT projet" in the **Other organisation** tab.

4. Completing the DMP

a. « General Information » section



It is not necessary to select specific guidance (box on the right). All the advice and examples of answers provided by the Institut Pasteur will be displayed by default.

"Project Information" section:

- If your project is funded by ANR, you can automatically import some information (Project title, acronym, funder, abstract…) by clicking on **Click here if you have an ANR funded project**. Then simply fill in the missing information.

- The information requested on the project is the following:
  - **Project title and Acronym**
  - **Project abstract**
  - **Fundings**
    - Click on the **Create** button to add a funding source.
    - Select the funder from the drop-down list, and then specify, if known, the grant identifier (also known as "grant number") and the funding status.
    - Once saved, you can click on to modify the funding and, for some funders, have the link to their data policy (this is notably the case for the ANR and the European Commission
  - **Start and end dates of the project**
  - **List of partners** associated with the project: to be selected from a drop-down list based on the ROR registry. If the partner institution does not appear in the list, click on to add it
  - **Experimental plan reference:** The experimental plan describes the steps needed to test the hypotheses of the study, often in the form of a diagram. It is not yet possible to add an image directly to DMP OPIDoR, but this part allows you to make a link to a document published online (and therefore having an identifier or URL) describing this experimental plan.

- **Project coordinator** : By default, the person who creates the DMP on DMP OPIDoR is considered to be the project coordinator. If you wish to change the project coordinator and the person is not in the drop-down list, add them with the ➕

Note: As soon as you add a person in this way, they will automatically be added to the **Contributors** tab. You will be able to modify the information about this person at any time via this tab.

« Plan details » section:

- **Plan title**: indicate for example "DMP of project X (Acronym)".
- **Deliverable number:** if the DMP is requested by your funder, it corresponds to a deliverable in your project. If you do not have the information, you can skip this question.
- **DMP version**: the DMP is a living document with several versions. Indicate here whether it is the initial, mid term or final version. To find out how to manage versions in DMP OPIDoR, go to part 7 of this document: "Managing versions of your DMP".
- **Plan purpose/scope and its relation to other deliverables**: in particular, indicate whether the DMP is only about research data or about other research outputs (e.g. software, scripts, programmes). A suggestion that can be adapted:

"The DMP describes the data management life cycle for all datasets that will be collected or generated in the project. It specifies what data will be collected, processed or generated, following what methodology and standards, whether and how this data will be shared and/or made open, and how it will be preserved."

- **Language in which the plan is drafted**
- **DMP manager:** By default, the person who creates the DMP on DMP OPIDoR is considered to be the "DMP manager" (the person in charge of drawing up the DMP and coordinating data management). If you wish to change the " DMP manager" and the person is not in the drop-down list, add them with the ➕
- **Plan identifier**: this information can only be filled in if you publish or deposit the DMP in a repository (e.g. Zenodo or HAL). In this case, a unique identifier will be attributed to the DMP and you can indicate it here.
- **Identifier type**: this will be for example a DOI if you deposit the DMP in Zenodo.
- **Plan license**: When publishing the DMP, it is important to define the conditions for re-use of the information contained in your DMP. This can be done by assigning a Creative Commons license. Click here for help on choosing a licence.

Finally, you can list any document or resource that you think is relevant to be associated with your DMP (article, protocol, patent, project website...). To do this, click on the **Create** button and add the name of the resource as well as its identifier (for scientific publications, this is generally a DOI - Digital Object Identifier) or URL.

b. « Contributors » section

This tab gives you an overview of all the people or organisations that are mentioned in your DMP and their role. You cannot add contributors directly in this tab, you have to add them via the other tabs (e.g. "DMP manager" in the **General Information** section, Data contact in the **Research Outputs** section).

This tab essentially allows you to modify the information on the contributors, via the button

For the persons:

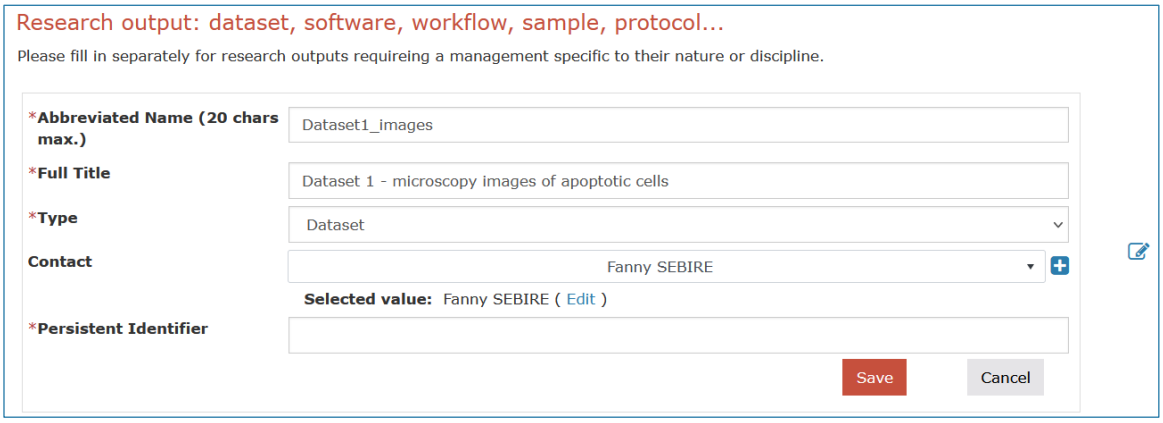
- **Last name, First name, Email**
- **Identifier**: indicate the ORCID of the person
- **Identifier type**: select "ORCID ID" if you have added the person's ORCID in the "Identifier" field
- **Affiliation** of the person
- **Affiliation identifier and Affiliation identifier type**: this information is not mandatory. If you know the ROR ID of the institution, indicate it and enter "ROR ID" as the type of identifier.

c. « Research outputs » section

This tab allows you to indicate the different research outputs, and in particular the different **datasets**, that your project comprises.

It is important to define - in this tab - the different datasets of your project. This will allow you to duplicate the **Datasets** section and answer the questions for each dataset separately.

- Your project includes at least one dataset. Fill in the information about it by clicking on :
  - **Abbreviated name** (e.g. "Dataset1_images")
  - **Full title** (e.g. "Dataset 1 - microscopy images of apoptotic cells")
  - **Type**: choose the "dataset" type from the drop-down list
  - **Contact**: to be chosen from the drop-down list or added with the
  - **Persistent identifier**: you will be able to complete this field when you have deposited your dataset in a repository assigning a unique and persistent identifier.
- Click on **Save**
- If you wish to add another dataset, click **Create** and then the button to complete the information. Don't forget to click on **Save** after modifying the information

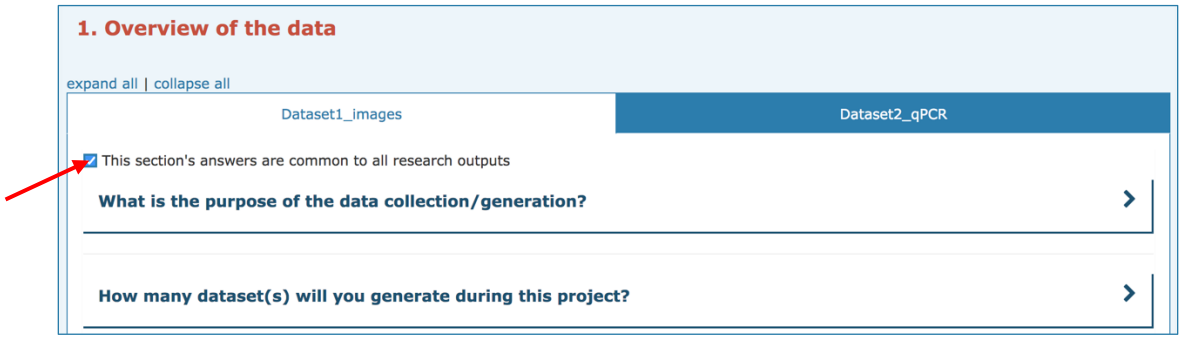


Note: DMP OPIDoR suggests many types of research outputs, but we recommend you to use only the "dataset" type, the widest and most adapted to this DMP template.

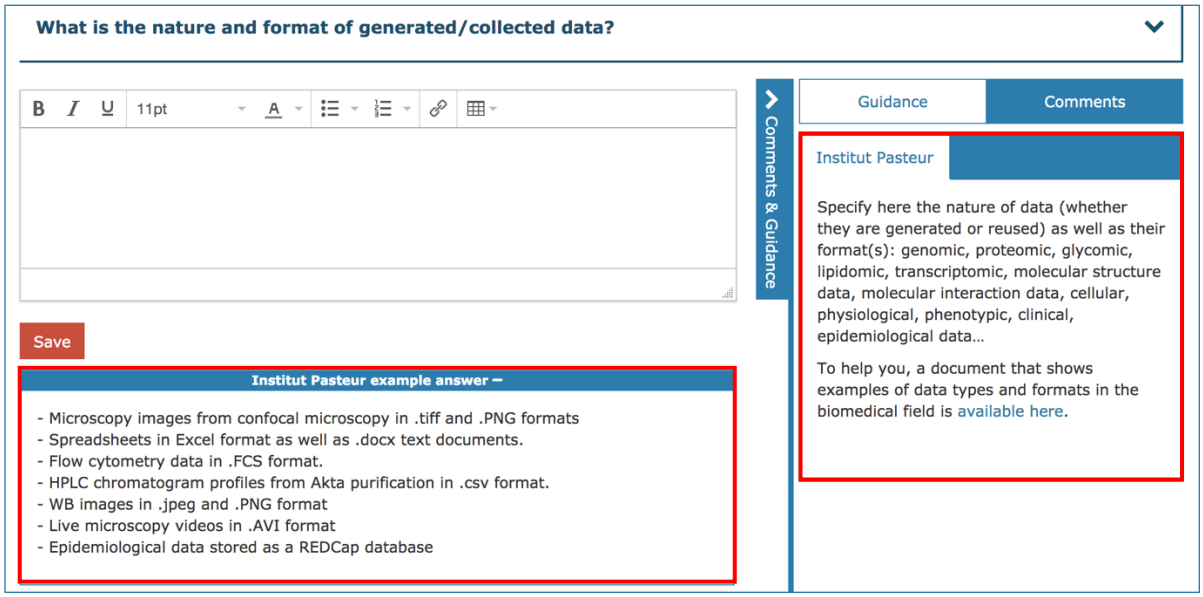
d. « General information on data » section

The **General information on data** section is divided into 5 parts, each to be completed only once, even if your project has several datasets.

- At the beginning of each part, remember to tick the box "This section's answers are common to all research outputs".



- For most questions, you will find advice provided by the relevant departments of the Institut Pasteur (by clicking on **Comments & Guidance** on the right) and examples of answers (below the answer).

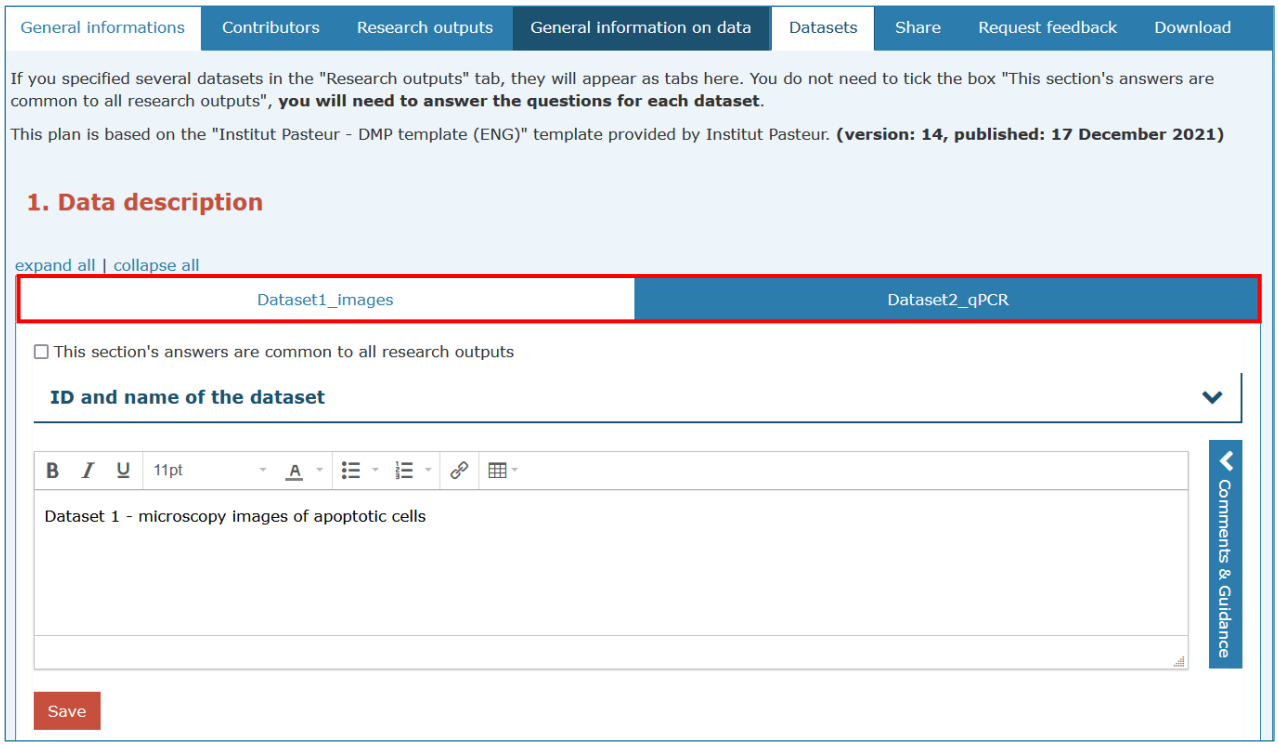


- You can leave a comment for your collaborators in the box on the right (see the "Share" section to invite collaborators). Don't forget to click on the **Save** button below the comment.

e. « Datasets » section

The **datasets** section has 6 parts.

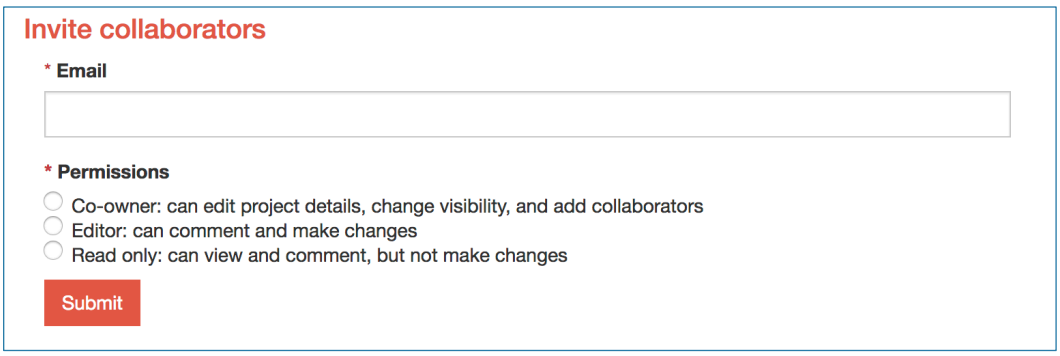
Your different datasets appear as tabs. You do not need to tick the box "This section's answers are common to all research outputs", **you will need to answer the questions for each dataset**.



5. Making your DMP accessible to others

a. Sharing your DMP with your collaborators

The **Share** tab allows you invite collaborators to read, comment or modify your DMP.

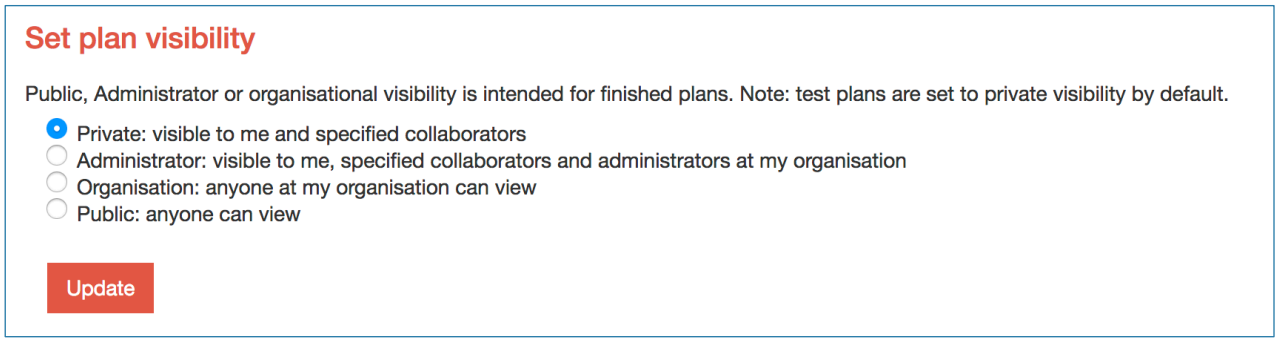


- Enter the email address of the collaborator you would like to invite to read or modify your plan
- Choose the permissions you want to grant him (co-owner, editor, read only) and click **Submit**
- Your collaborator will receive an email inviting him/her to contribute to your DMP. If they don't have a DMP OPIDoR account yet, they will have to create one and will then be able to access the DMP via the **Dashboard**.

The **Manage collaborators** section allows you to modify or delete your collaborators' permissions at any time.

b. Setting plan visibility

The **Share** tab also allows you to set the visibility of your DMP.

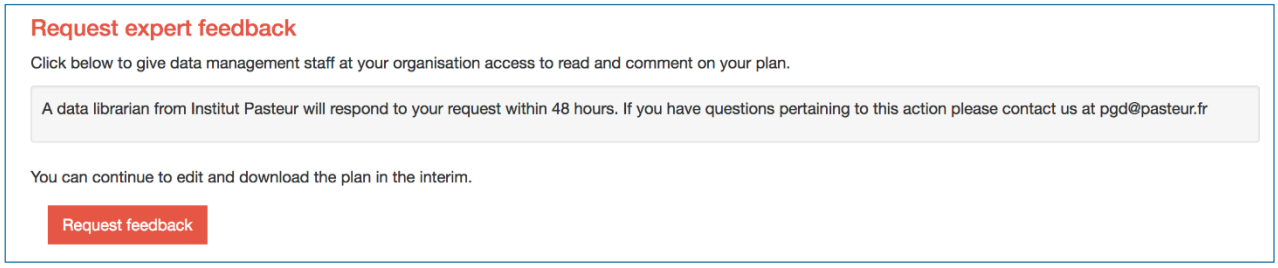


By default, your DMP will be visible only to you and the collaborators with whom you have shared it (**Private** visibility)

- In order for the Institut Pasteur's DMP team to have an idea of the number of DMPs made with DMP OPIDoR, **please change the visibility to Administrator**. Your DMP will be visible to you, your collaborators and the DMP team.
- **Once the first version of your DMP is finalized**, you can choose to share it with other members of the Institut Pasteur. This can help them complete their own DMP by having an overview of the type of answer to be given to each question. In this case, change the visibility to **Organisation**.
- At the end of the project, **when you have finished the last version of your DMP**, you can choose to make it public (accessible to all via the **Public DMPs** tab at the top). In this case, change the visibility to **Public**.

c. Requesting advice or guidance on your DMP

The **Request feedback** tab allows you to indicate to the Institut Pasteur's DMP team that you need advice or a review of your DMP.



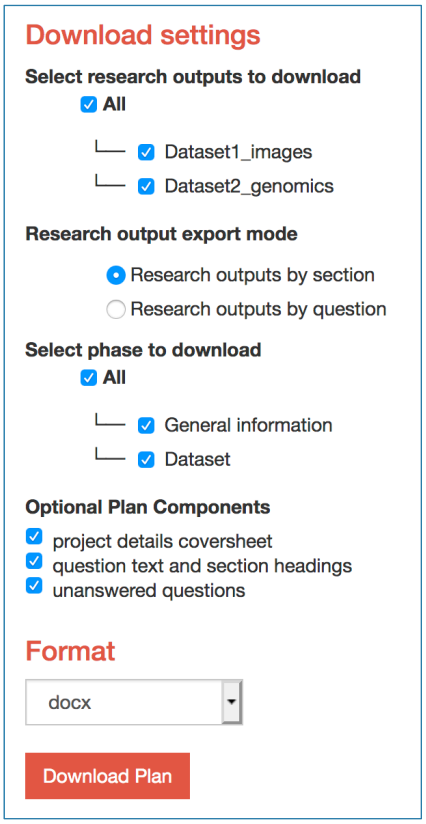
- Once you have finished answering the DMP questions, click on the **Request feedback** button to allow the Institut Pasteur's DMP team to access your DMP.
- A member of the DMP team will receive an e-mail giving him/her read-only access to your DMP. He or she will add comments on your DMP to give you advice, indicate if there are corrections to be made, missing information or if your DMP is fine as it is.
- You will receive an email as soon as the person has finished making their comments.

During the drafting process, if you need advice on how to answer the DMP's questions, do not hesitate to send an e-mail directly to pgd@pasteur.fr.

6. Exporting your DMP

Once you complete a version of the DMP, you can export it in different formats (html, pdf, docx). This can be useful if you need to send your DMP to your funder.

- Click on the **Download** tab and then select the download settings.
    - Export all research outputs
    - Prefer the more readable "Research outputs by section" export mode.
    - Download all « phases »
    - Export all optional plan components
    - Prefer the docx format, which will enable you to reformat your DMP before sending it to your funder (addition of a header, footer, etc.).
- Finally click on **Download Plan**



7. Managing versions of your DMP

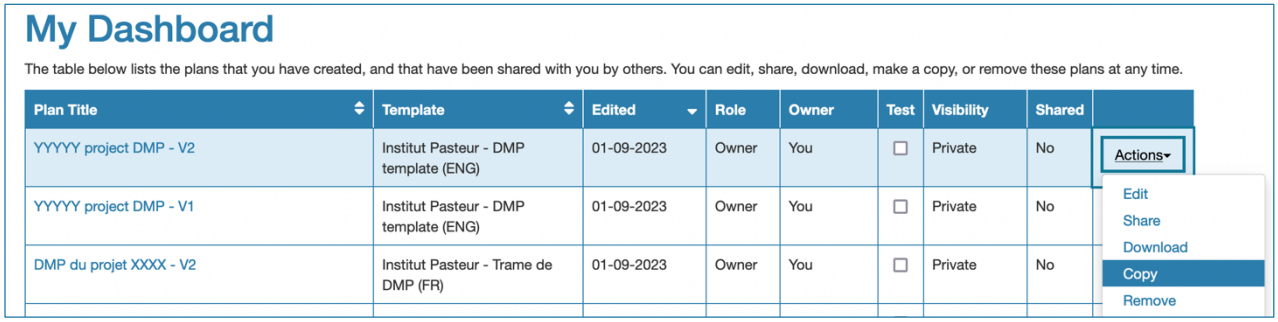
DMP OPIDoR does not have a version management system yet. To create different versions of the same DMP, you have two options:

- **Create a single DMP on DMP OPIDoR** that you update whenever there is a new version of the DMP

- To keep a history of the different versions of your DMP, **export each major version** and keep it on a shared project space.
- Don't forget to change the version of the DMP (Part **General Information** > **Plan details**).

- **Duplicate your DMP** whenever you want to create a new major version.

- Add the version number to the title of your DMP ("Acronym - Project Title - Version")
- In the **Dashboard**, to the right of your DMP, click on **Actions**, then **Copy**.
- A new version of your DMP is then created. Modify the title of the DMP to change the version number. Warning! With this solution, **you have to re-add the collaborators** with whom you want to share your DMP.
- The different versions of your DMP are now accessible from the **Dashboard**.



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.

Plan Title	Template	Edited	Role	Owner	Test	Visibility	Shared	
YYYYY project DMP - V2	Institut Pasteur - DMP template (ENG)	01-09-2023	Owner	You	☐	Private	No	Actions
YYYYY project DMP - V1	Institut Pasteur - DMP template (ENG)	01-09-2023	Owner	You	☐	Private	No	
DMP du projet XXXX - V2	Institut Pasteur - Trame de DMP (FR)	01-09-2023	Owner	You	☐	Private	No	

Actions
- Edit
- Share
- Download
- Copy
- Remove