Drawing up your data management plan with DMP OPIDoR

PRACTICAL GUIDE
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 that you can answer using 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 REDCap to write your DMP. See the guide Writing your DMP with REDCap.

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 plans at the top of your DMP OPIDoR account homepage.

- Indicate the acronym followed by 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. « Project Details » section

- Fill in the requested information:
  - Acronym and project title
  - Funder
  - Grant number
  - Project abstract
  - ID (of the DMP): e.g. "DMP_Acronym".
  - Principal Investigator information

- 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.

b. « 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 Dataset section and answer the questions for each dataset separately.

- Your project includes at least one dataset. Fill in the information about it:
  - Abbreviated name (e.g. "Dataset1_images")
  - Fullname (e.g. "Dataset 1 - microscopy images of apoptotic cells")
  - Type: choose the "dataset" type from the drop-down list
  - 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 Submit

- If you wish to add another dataset, click Add a research output and complete the information. Don't forget to click on Submit
N.B. 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.

c. « Plan overview » section

There is nothing to complete in the Plan overview section. It simply gives you an overview of the different parts and questions of the DMP template.

The template of the Institut Pasteur is divided into two parts:

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

d. « General information » section

The General information section is divided into 7 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". Then click on any of the section's Save buttons to take this into account.

- For most questions, you will find advice provided by the relevant departments of the Institut Pasteur (to the right of the question) 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. “Dataset” section**

The **dataset** 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.

[Diagram of the dataset section with options to expand or collapse content]

[Example dataset options: Dataset1_images, Dataset2_genomics]
5. Making your DMP accessible to others

The Share tab allows you to define who has access to your DMP.

a. Sharing your DMP with your collaborators

- 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. Requesting advice or guidance on 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.
c. Setting plan visibility

Set plan visibility

Public, Administrator or organisational visibility is intended for finished plans. Note: test plans are set to private visibility by default.

- Private: visible to me and specified collaborators
- Administrator: visible to me, specified collaborators and administrators at my organisation
- Organisation: anyone at my organisation can view
- Public: anyone can view

Update

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 done, 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.

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 number of the DMP (Part General Information > 1. Information on the Data Management Plan).

- **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 **Make a 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.

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**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.

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Template</th>
<th>Edited</th>
<th>Role</th>
<th>Owner</th>
<th>Test</th>
<th>Visibility</th>
<th>Shared</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acronym - Title of the project - V1</td>
<td>Institut Pasteur - DMP template (ENG)</td>
<td>10-04-2020</td>
<td>Owner</td>
<td>You</td>
<td></td>
<td>Administrator</td>
<td>No</td>
<td>Actions</td>
</tr>
<tr>
<td>Acronym - Title of the project - V2</td>
<td>Institut Pasteur - DMP template (ENG)</td>
<td>10-04-2020</td>
<td>Owner</td>
<td>You</td>
<td></td>
<td>Administrator</td>
<td>No</td>
<td>Actions</td>
</tr>
</tbody>
</table>

Create plan

Make a copy

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Edit
Share
Download
Remove