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Themed guidance

There are 14 themes that represent the most common topics addressed in data management plans (e.g., Data format, Metadata & documentation, Data repository). Themes work like tags to associate questions and guidance. Questions within a template can be tagged with one or more themes (see the inventory of Funder template themes). Administrators can then create guidance by theme to apply their advice over all templates at once. This alleviates the need to update guidance each time a new version of a template is released.

Themes ?

<input type="checkbox"/> Budget	<input type="checkbox"/> Data sharing	<input type="checkbox"/> Preservation
<input type="checkbox"/> Data collection	<input type="checkbox"/> Data volume	<input type="checkbox"/> Related policies
<input type="checkbox"/> Data description	<input type="checkbox"/> Ethics & privacy	<input type="checkbox"/> Roles & responsibilities
<input type="checkbox"/> Data format	<input type="checkbox"/> Intellectual Property Rights	<input type="checkbox"/> Storage & security
<input type="checkbox"/> Data repository	<input type="checkbox"/> Metadata & documentation	

For example, most funder templates include a question about data sharing. In the screenshot below, the Glasgow guidance with the theme "Data sharing" would appear next to every question across all templates tagged with this theme.

Guidance list

You can write pieces of guidance to be displayed by theme (e.g. generic guidance on storage and backup that should present across the board). Writing generic guidance by theme saves you time and effort as your advice will be automatically displayed across all templates rather than having to write guidance to accompany each.

If you do have a need to provide guidance for specific funders that would not be useful to a wider audience (e.g. if you have specific instructions for applicants to BBSRC for example), you can do so by adding guidance to a specific question when you edit your template.

Search

Text	Themes	Guidance group	Status	Last updated	
<p>We have the following suggested text available for users of Enlighten: Research Data:</p> <p>'Data in Enlighten: Research Data, the University of Glasgow's Data Repository, will be issued with a Digital Object Identifier (DOI). This can be included as part of a data citation in publications, allowing the datasets underpinning a publication to be identified and accessed. DOIs will also be linked with appropriate records in Enlighten: Publications, the University's publication repository, to enhance visibility of datasets.</p> <p>Metadata about datasets held in the University Registry will be publicly searchable and discoverable and will indicate how and on what terms the dataset can be accessed.</p> <p>Information about datasets from the Registry will be displayed on researcher profile pages on the University of Glasgow webpages which will also increase the visibility of the datasets.'</p>	Data sharing	Glasgow Uni	Published	23-06-2017	Actions-

There are 3 basic steps to creating themed guidance:

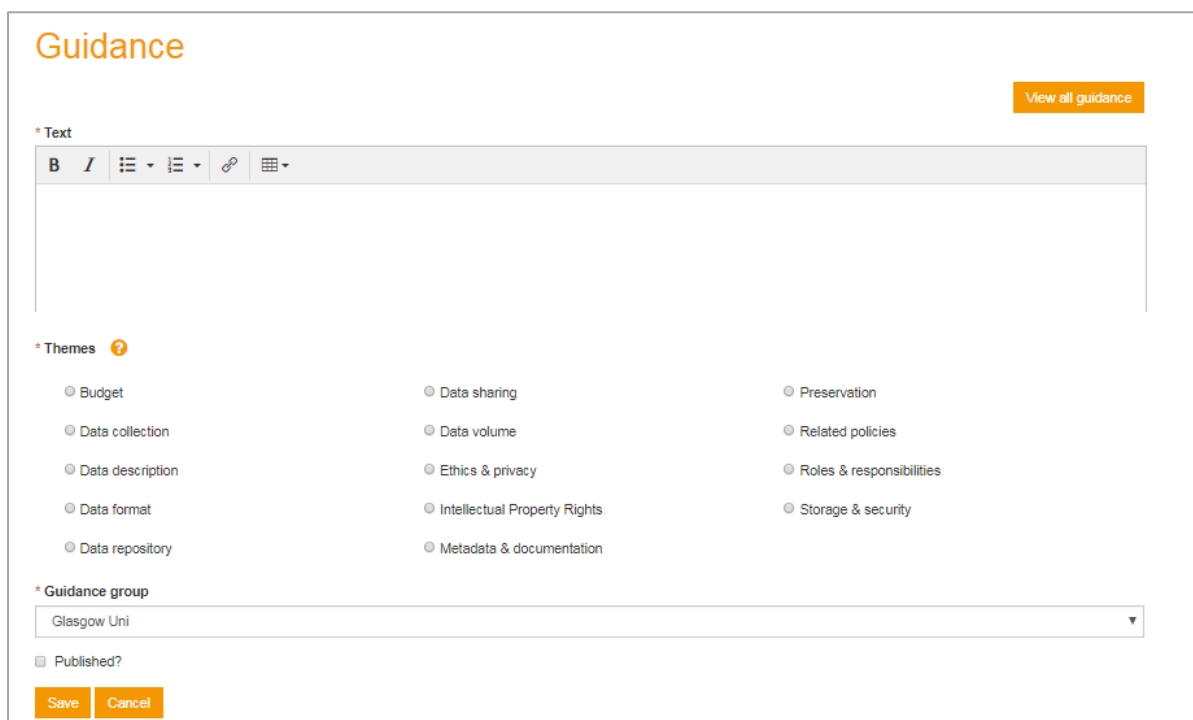
1. Create a guidance group
2. Create guidance
3. Publish the guidance

Create a guidance group

Click to "Create a guidance group" (if needed). You will already have a default guidance group for your organisation; it is optional to create additional groups or subgroups, for example, for a specific department. Enter a name: this will be used in the tabs on the front-end to explain where the guidance has come from. If you are creating guidance for a sub-group (i.e. a department, research group or other entity which doesn't apply to all users from your organisation) check the box for sub-group. Guidance groups need to be published for guidance to display to end users.

Create guidance

Click to "Create guidance" and fill in the form below. Enter your guidance in the text box and choose one or more themes. Your guidance will display to end users whenever a question in a funder or institutional template is tagged with the corresponding theme(s). Select the guidance group to which this guidance pertains and check the box to publish it when you are ready to go live.



The screenshot shows the 'Guidance' form in the DMPonline system. At the top left is the title 'Guidance' in orange. At the top right is a button labeled 'View all guidance'. Below the title is a text editor with a toolbar containing icons for bold (B), italic (I), bulleted list, numbered list, link, and table. The text editor is currently empty. Below the text editor is a section titled '* Themes' with a help icon. It contains 12 radio button options arranged in three columns: Budget, Data collection, Data description, Data format, Data repository, Data sharing, Data volume, Ethics & privacy, Intellectual Property Rights, Metadata & documentation, Preservation, Related policies, Roles & responsibilities, and Storage & security. Below the themes is a dropdown menu for '* Guidance group' with 'Glasgow Uni' selected. At the bottom left is a checkbox for 'Published?'. At the bottom are two buttons: 'Save' and 'Cancel'.



DMPonline: creating guidance

Publish guidance

You can publish and unpublish individual pieces of guidance and entire guidance groups. This gives you the flexibility to draft and edit guidance before making it public.

Guidance for your organisation will be presented to users whenever they have selected your organisation from the dropdown list in the 'create plan' wizard. Users can choose to switch on/off guidance and change selections to add other institutions or guidance groups via the "Project details" page as they draft their plan.

COMET

- Project Details
- Plan overview
- Outline DMP
- Full DMP
- Share
- Download

*** Project title**
COMET

mock project for testing, practice, or educational purposes

Funder
Natural Environment Research Council (NERC)

Grant number

Project abstract

Plan Guidance Configuration

To help you write your plan, DMPonline can show you guidance from a variety of organisations.

Select up to 6 organisations to see their guidance.

- Digital Curation Centre
 - University of Edinburgh
 - Edinburgh
 - Roslin Institute

Find guidance from additional organisations below

[See the full list](#)





Question-specific guidance

Guidance can also be provided for a specific question. If you create your own template, you can add guidance to accompany each question as you create the template.

Question 1:

* Question Number





* Question text

B *I*    





What data will be produced?

Answer format





Default answer

B *I*    


Example answer

B *I*    

Guidance

B *I*    

What physical data will you study? (e.g. artefacts, samples, paper archives, etc.) And what digital data will be 'captioned'/derived from these? (field-notes, images, measurements, spreadsheets, survey data, etc.) What data will be 'created' digitally? (images, some analytical and survey data, etc.) Describe the methods/standards for data creation. What file formats and software will you use? Consider how many individual files you expect to make, anticipated file sizes, and total storage volume

Themes 

<input type="checkbox"/> Budget	<input type="checkbox"/> Data sharing	<input type="checkbox"/> Preservation
<input type="checkbox"/> Data collection	<input type="checkbox"/> Data volume	<input type="checkbox"/> Related policies
<input type="checkbox"/> Data description	<input type="checkbox"/> Ethics & privacy	<input type="checkbox"/> Roles & responsibilities

Guidance can also be provided for specific funder questions. This can be useful where the guidance will only be relevant in one context e.g. in response to MRC's question about local policies. Guidance can be added when customising funder templates. Please bear in mind that you will need to check and update these annotations each time funder templates change.

7. Relevant policies

Questions

Question number 2
Question text 7. Relevant institutional, departmental or study policies on data sharing and data security





Default value	Policy	URL or reference
	Data Management Policy and Procedures	
	Data Security Policy	
	Data Sharing Policy	
	Institutional Information Policy	
	Other	
	Other	

Answer format Text area No additional comment area will be displayed.
Guidance Please complete, where such policies are (i) relevant to your study, and (ii) are in the public domain, e.g. accessibly through the internet.
Add any others that are relevant





Themes No themes selected

Annotations

Example answer

B *I*    

Guidance

B *I*    

Save