

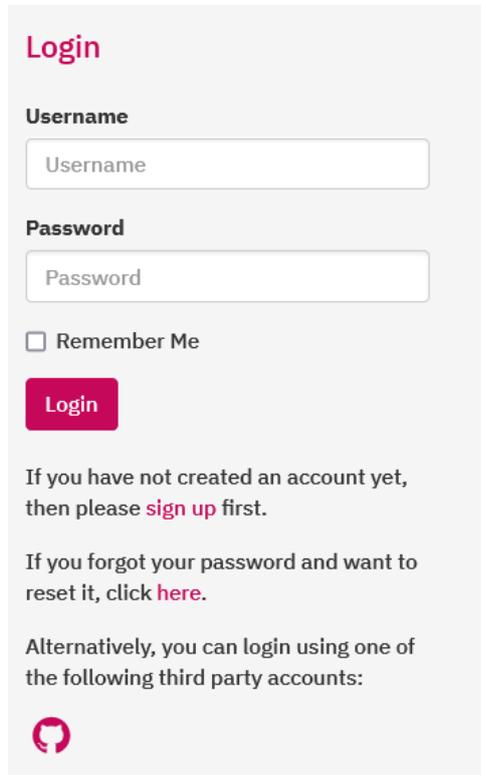
RDMO Quickstart Guide for User

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Login

Users will first have to sign up and create an account. Alternatively, you can log in using a third-party account (GitHub or ORCID, see screenshot 1).

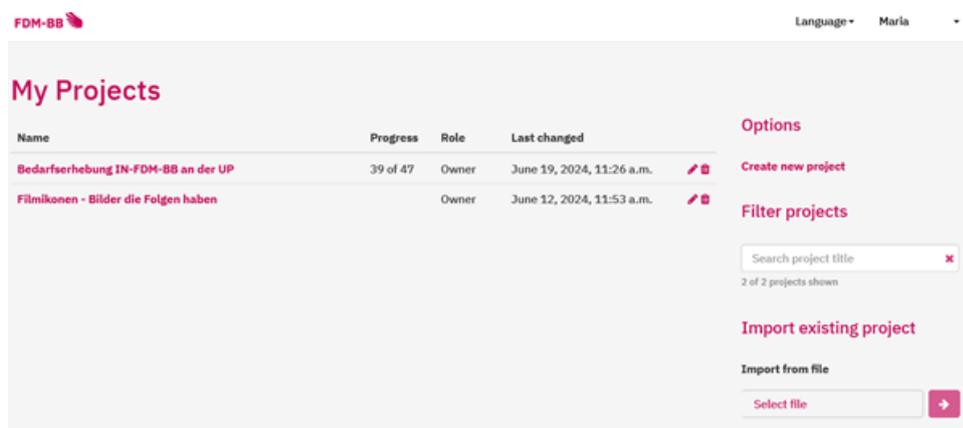


The screenshot shows a login form with the following elements:

- Login** (Section Header)
- Username** label above a text input field containing the placeholder "Username".
- Password** label above a text input field containing the placeholder "Password".
- Remember Me checkbox.
- Login** button.
- Text: "If you have not created an account yet, then please [sign up](#) first."
- Text: "If you forgot your password and want to reset it, click [here](#)."
- Text: "Alternatively, you can login using one of the following third party accounts:"
- GitHub logo icon.

Figure 1 Login

After logging in you have access to your own welcome page with an overview of all options available as well as your own projects. In the top right corner you can choose a language (German or English, other languages might be available later on). Displayed right next to it is your name. Clicking on the small arrow will open the profile menu, in order to edit it or to logout.



The screenshot shows the 'My Projects' page with the following layout:

- Top left: **FDM-BB** logo.
- Top right: Language+ and Maria -.
- Section Header: **My Projects**
- Table of projects:

Name	Progress	Role	Last changed	
Bedarfserhebung IN-FDM-BB an der UP	39 of 47	Owner	June 19, 2024, 11:26 a.m.	
Filmikonen - Bilder die Folgen haben		Owner	June 12, 2024, 11:53 a.m.	

- Options: **Create new project**
- Filter projects: Search project title (with clear 'x' button), 2 of 2 projects shown.
- Import existing project: **Import from file**, Select file (with arrow button).

Figure 2 Web page after login

Create a new project

At you first login the project list will be empty. To create a new Research data management plan click “Create new project” on the sidebar below **Options**. After assigning a title and short description for you project, select a catalog of question. It is advised to choose according to your university or discipline, apart from that we provide catalogs for certain funding partners (e.g. Horizon Europe, DFG).

In case you are a member of a parent project in RDMO, you can upload answers from there into your sub-project here.

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

Questionnaire for the creation of a research data policy for research projects

DFG
Fragenkatalog nach den DFG *Leitlinien zum Umgang mit Forschungsdaten (2015)*. Geeignet für Datenmanagementpläne, die Förderanträgen an die Deutsche Forschungsgemeinschaft (DFG) beigelegt werden sollen und keine fachspezifischen Zusatzanforderungen zu erfüllen haben.

[...]

Parent project
The parent project of this project.

Create project Cancel

Figure 3 Create a new project and selection which catalog you want to use for this project (the displayed catalogues are examples)

Creating DMP and answering questions

After creating the new project you will be shown an overview of your plan:

- *Title*
- *Description*
- *catalog*
- *Members*: Here you can see who can access the project and invite additional members. You can edit the user roles to manage which rights each member has. You can leave the project with the button next to your name. If you are the only *Owner* of the project, this will permanently delete the project.
- *Tasks*: Tasks are generated automatically from the answers given in the project. On the page of each task you can see which of your answers lead to the activation of the task.
- *Snapshots*: Snapshots allow you to save all responses at a given point in time and preserve a certain stage of the project. Later the snapshot can be used to create views, and the project can also be reset to a previous snapshot, if needed.
- *Views*: A view is a template determining how the answers given by the user will be displayed in a text document. For example, certain questions and their answers can be extracted, or the layout adapted. Views are created using the answers given in the project and can then be exported in various formats. Initially, all views are empty. Please answer some questions by visiting “Answer Questions” (at the top of the sidebar).

The sidebar provides an option overview. Information like title, description or catalog can be changed here (in case of changing your catalogue, answers will be automatically transferred). Furthermore, snapshots can be created to save intermediate results at a certain stage of the project (they can be used to reset back to a previous snapshot, if needed), other members can be added to the project, or the whole project can be deleted irrevocably.

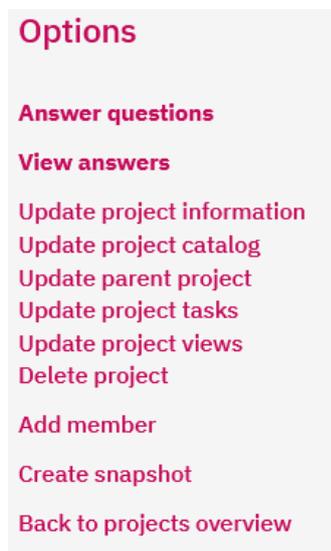


Figure 4 Options overview

Select “Answer questions”. You will be automatically guided to the first question of the catalog.

Many questions can be answered in free text form. The text box can be enlarged holding and pulling on the triangle in the lower right corner.

My Projects / Test 2 / Before data collection

Topic

Please briefly describe the project and its goals (e.g. hypothesis or research question).

Please enter some keywords about the project.

The Keywords Serve to make your study easier to find in the context of data archiving or publication (FAIR principles).

Include terms that are specific to your topic, methodology, and target audience. Use natural language and avoid words used in the title or terms that are too general. If you need help with the selection of keywords, try a keyword search using the search engine to check the results.

line by line. You can add lines using the green button and remove them using the blue cross (x).

Back Proceed

Figure 5 Topic description, keyword assignment, mouse over with annotations

Your answers will be saved automatically. They will also be saved when selecting “Proceed”. The “Back”-button allows you to return to the previous page.

Here the sidebar shows a project **Overview**, **Progress** bar, and question **Navigation**.

Overview

Project: Test 2
Catalog: DMP-UP

Reload page
Back to my projects

Progress

0 of 13

Back Proceed

Navigation

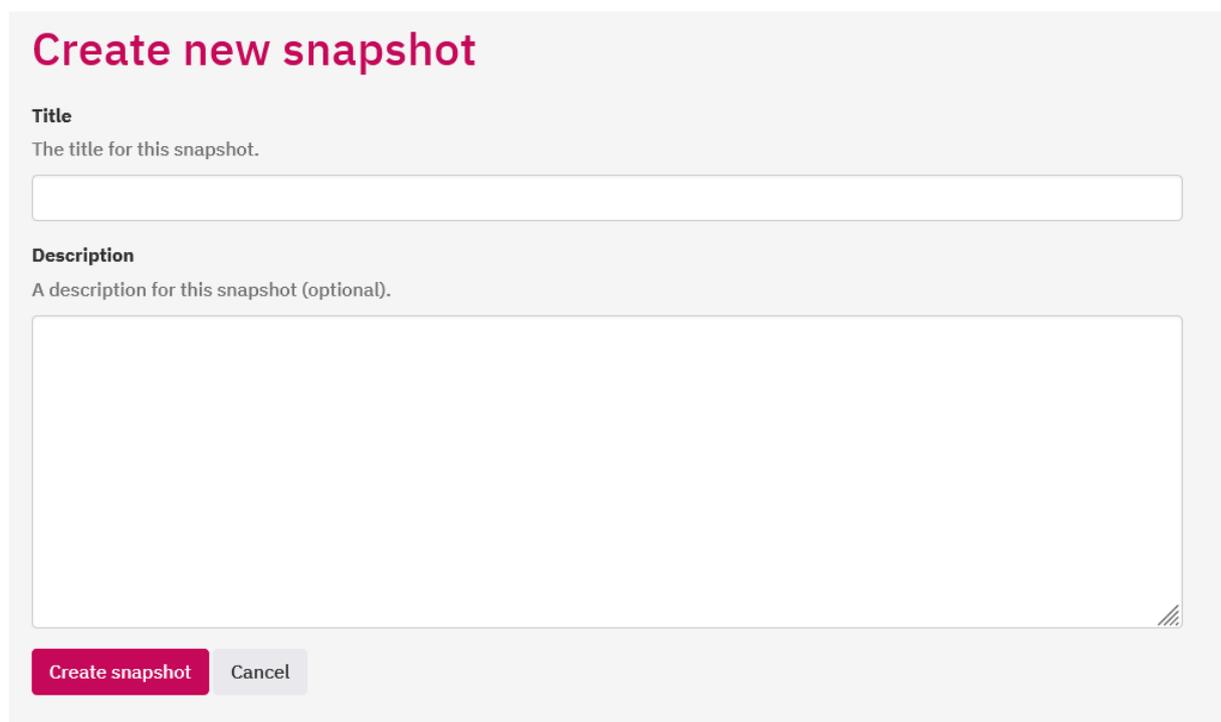
Figure 6 Overview, Progress, Navigation

Navigation will show you which question sets you have answered and which are still to come. Using **Navigation** will save your input. Grey entries will be skipped depending on your previous input.

Views can be created for the specific requirements of funding organisations (e.g. Horizon Europe) These can also be exported in various formats. Initially, all views are empty. They are an output-function only, without changing any of the answers.

Versions

Going back to previous versions of your DMP requires creating *Snapshots*. Your answers are saved each time you select “Proceed”, but you are not able to go back to a previous version. *Snapshots* make it possible to go back to a previous version and continue to work from there. In order to create a *Snapshot* you have to go back to the main page of your project and select “Create new snapshot” from the sidebar (see screenshot 5). Give each *Snapshot* a title and a description (optional). *Snapshot*-titles are shown in the project’s main overview.



Create new snapshot

Title
The title for this snapshot.

Description
A description for this snapshot (optional).

Create snapshot **Cancel**

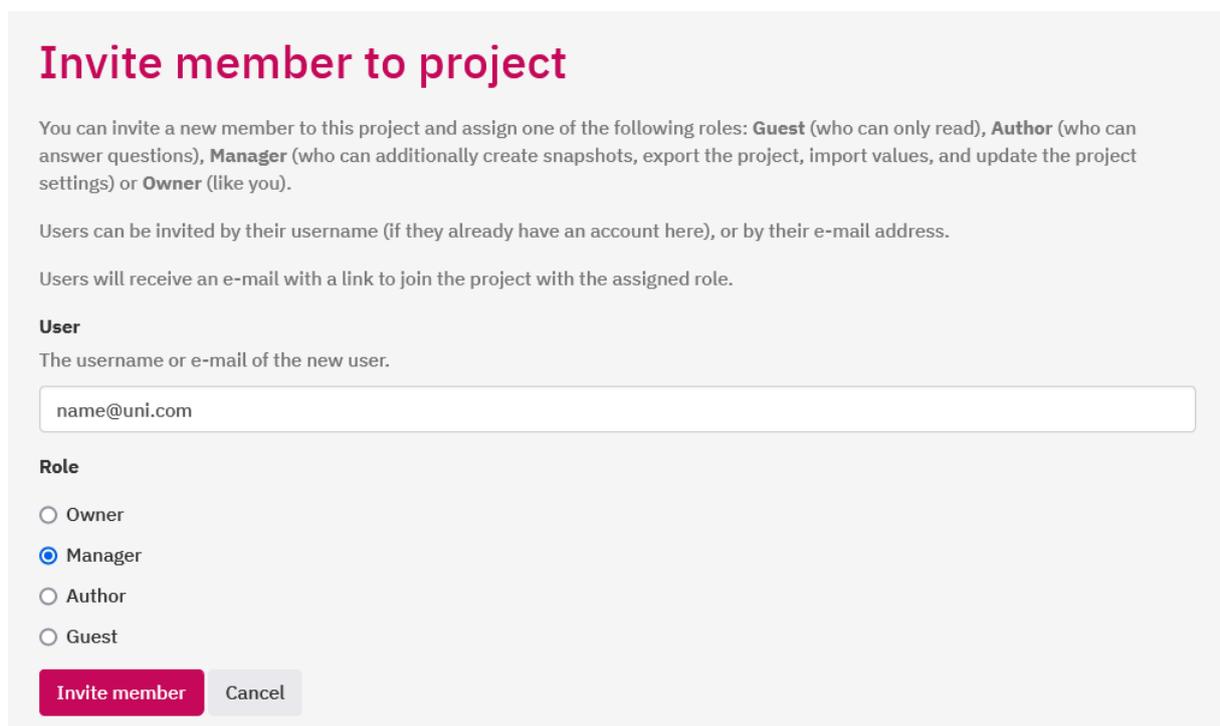
Figure 7 Create new snapshot

Member of a project

Add a member to your project with the function “Invite member to project” or the “Add member“-button (see screenshot 5). As the owner of a project you choose the rights for each new member when inviting them. There are four possible roles:

- Owner** Creating a project automatically makes you the owner of a project. It is possible to appoint somebody to be an owner as well. Owners have all rights in a project, including deleting it.
- Manager** Managers cannot delete a project but have all other rights, e.g. create snapshots, export the project, import values, and update the project settings.
- Author** Authors can edit the DMP (read and write access).
- Guest** Guests have read access only. They are also able to export DMPs in a preferred format.

Users can be invited by their username (if they already have an RDMO account), or by e-mail. Users will receive an e-mail with a link to join the project with the assigned role.



Invite member to project

You can invite a new member to this project and assign one of the following roles: **Guest** (who can only read), **Author** (who can answer questions), **Manager** (who can additionally create snapshots, export the project, import values, and update the project settings) or **Owner** (like you).

Users can be invited by their username (if they already have an account here), or by their e-mail address.

Users will receive an e-mail with a link to join the project with the assigned role.

User
The username or e-mail of the new user.

Role

Owner

Manager

Author

Guest

Figure 8 Invite member to project

Export DMP

Answers for the DMP can be viewed with the option “View answers” (see screenshot 5). From here it is possible to export and save the DMP locally in different formats (see screenshot 10).

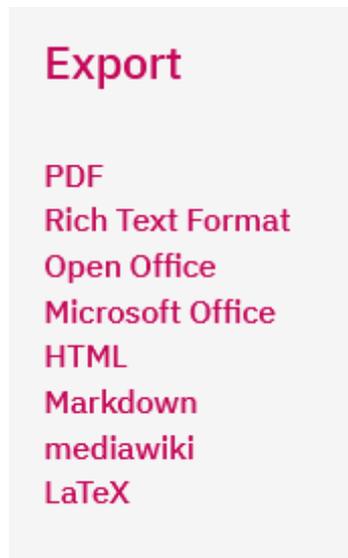


Figure 9 Export / download formats

Back in your project overview more options to export your DMP are available (see screenshot 11). It allows you to import your DMP into other RDMO instances or repositories like RADAR.



Figure 10 Selection DMP export formats (the displayed catalogues are examples and can change).

Import DMP

It is possible to import values (XML format only) and incorporate them into your DMP. The option **Import values** can be found at the bottom of the sidebar.

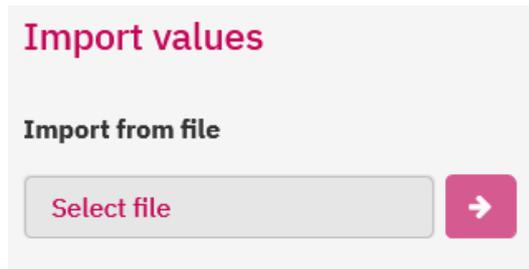


Figure 11 Import values

After selecting and uploading the XML-file you will be able to select which elements you would like to import.

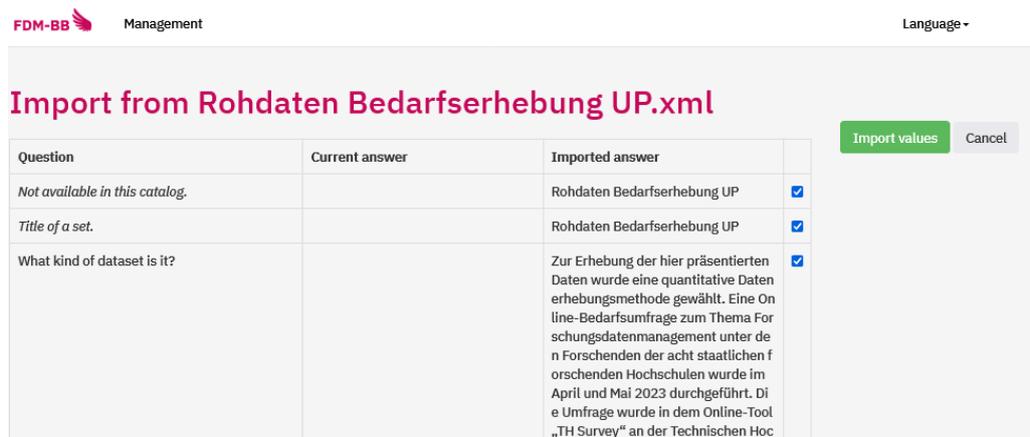


Figure 12 Import values 2

Finalization

After answering the questions of the DMP you can select “View answer” or “Back to project overview”.

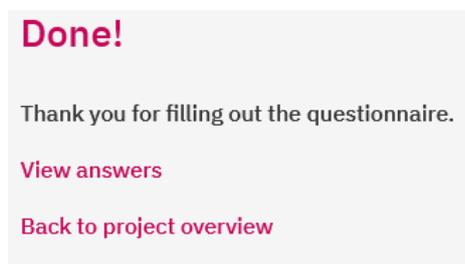


Figure 13 Finalization