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Document Name: SOUTH AFRICAN DATA MANAGEMENT PLANNING (DMP) TOOL: USER GUIDELINE

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Version: version 2

Date	**Version**	**Description of Changes**	**Author**
11 September 2023	Version 2	Adding SSO changes	May Maile
12 June 2013	Version 1	New version	Nobubele Shozi

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1. My Dashboard Page

Once logged in on SSO and clicking Data Management Tool title, you will be presented with your dashboard:

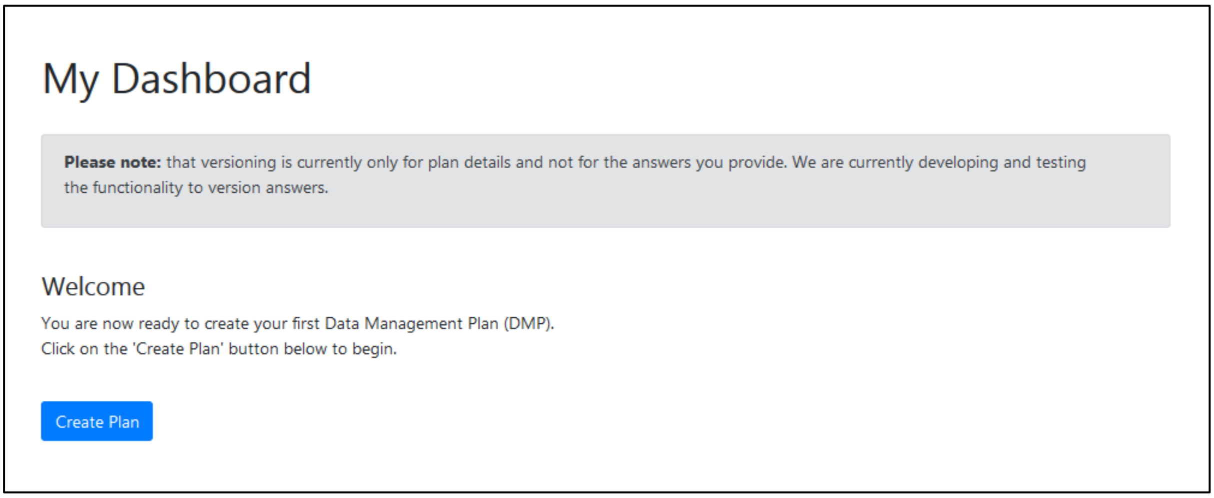


Figure 1: Dashboard

If you have not created a plan, you can proceed to create one by clicking on the 'Create Plan' button on the Dashboard or on the top menu.

2. Creating a New Plan

To create a plan, fill in the information on the page:

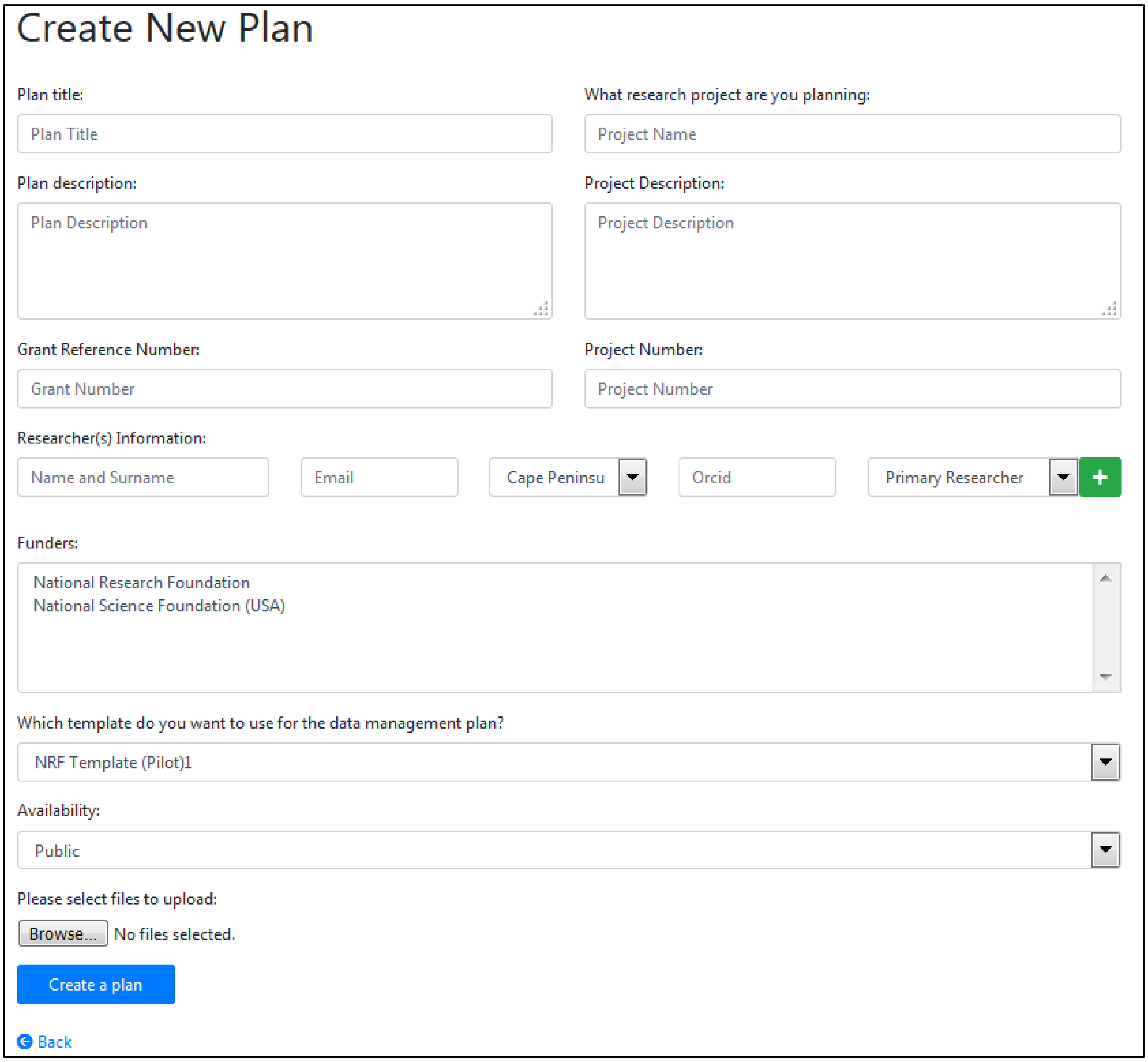


Figure 2: Create a Plan

Create a Plan has the following components:

- **Plan Title**. This will be the name that your plan is referred to in the SA DMP Tool.
- **Plan Description**. This provides a description of what the plan is about.

- **Grant Reference Number**. If your plan has a grant reference number, you can provide it in this field. The grant reference would be received from the institution that is providing you with the research grant.
- **Project Name**. This is the name of the project that the data management plan is linked to.
- **Project Description**. This is the description of the project that the data management plan is linked to.
- **Project Number**. This is the project number.
- **Researcher Information**. In this section, you are able to link one or more researchers to the plan. In order to do this, you need to provide the researcher Full name and surname, email address, choose their research institution, provide their ORCID number and specify their role in the research.
- **Funders**. You can be able to link a plan to funders by selecting the funder.
- **Which template do you want ot use for the data management plan**?. You can be able to select the template that you would like to use for the data management plan.
- **Availability**. You can choose to whom the data management plan should be available. Public means that it will be available and searchable by everyone. Private means it will only be available and searchable by you. Institutional wide means that only individuals that are in your institution will be able to search and access your plan.
- **Please select files to upload**. If there are any additional files that you want linked to your plan, you can be able to upload these.

Once all the required information is populated, click on ‘Create a Plan’ button. After your plan is created, it will be listed in your dashboard.

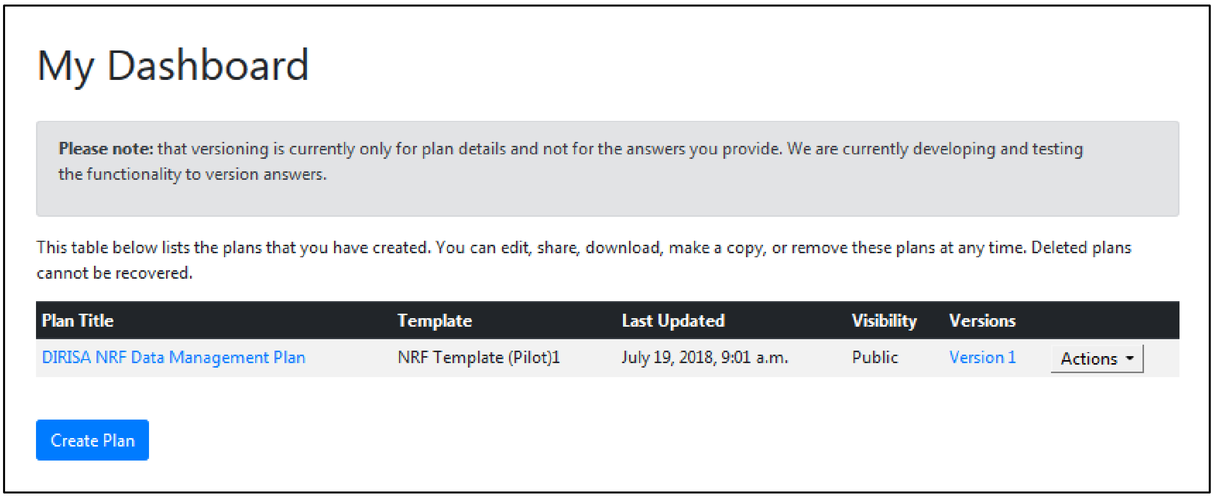


Figure 3: My Dashboard Page

To start interacting with you plan, you can explore the 'Actions' buttons. The actions button contains all the actions you can perform on your plan.

- **Create version**. Create version allows you to create a version of your plan.
- **View plan details**. You can view the plan details you entered when you created the plan.
- **Share plan**. You can share the plan with other people.
- **Complete plan**. Complete plan allows you to answer the questions in the plan.
- **Download plan**. You can download the plan in a number of formats.
- **Delete plan**. You can delete the plan.

3. Create Version of a Plan

To create a version of the plan, you need to have answered all the questions in the plan. To create a version, click on 'create version' under the 'Actions' button.

A new version will be created and this will be shown on the dashboard. By clicking on the version number on the dashboard, you can be able to revert back to previous versions:

Plan Versions

Version	Title	Description	Date Created	Revert
1	123 test	123 test	July 17, 2018, 9:03 a.m.	Initial creation version
2	123 test who!	123 test	July 17, 2018, 9:16 a.m.	
3	123 test who! hello!	123 test	July 17, 2018, 9:17 a.m.	
4	123 test who!	123 test	July 18, 2018, 2:23 p.m.	
5	123 test who!	123 test	July 18, 2018, 2:23 p.m.	Version used

Back

Figure 4: Plan Versions

4. View Plan Details

To view plan details, click on ‘View Plan Details’ in the ‘Actions’ buttons next to the related plan.

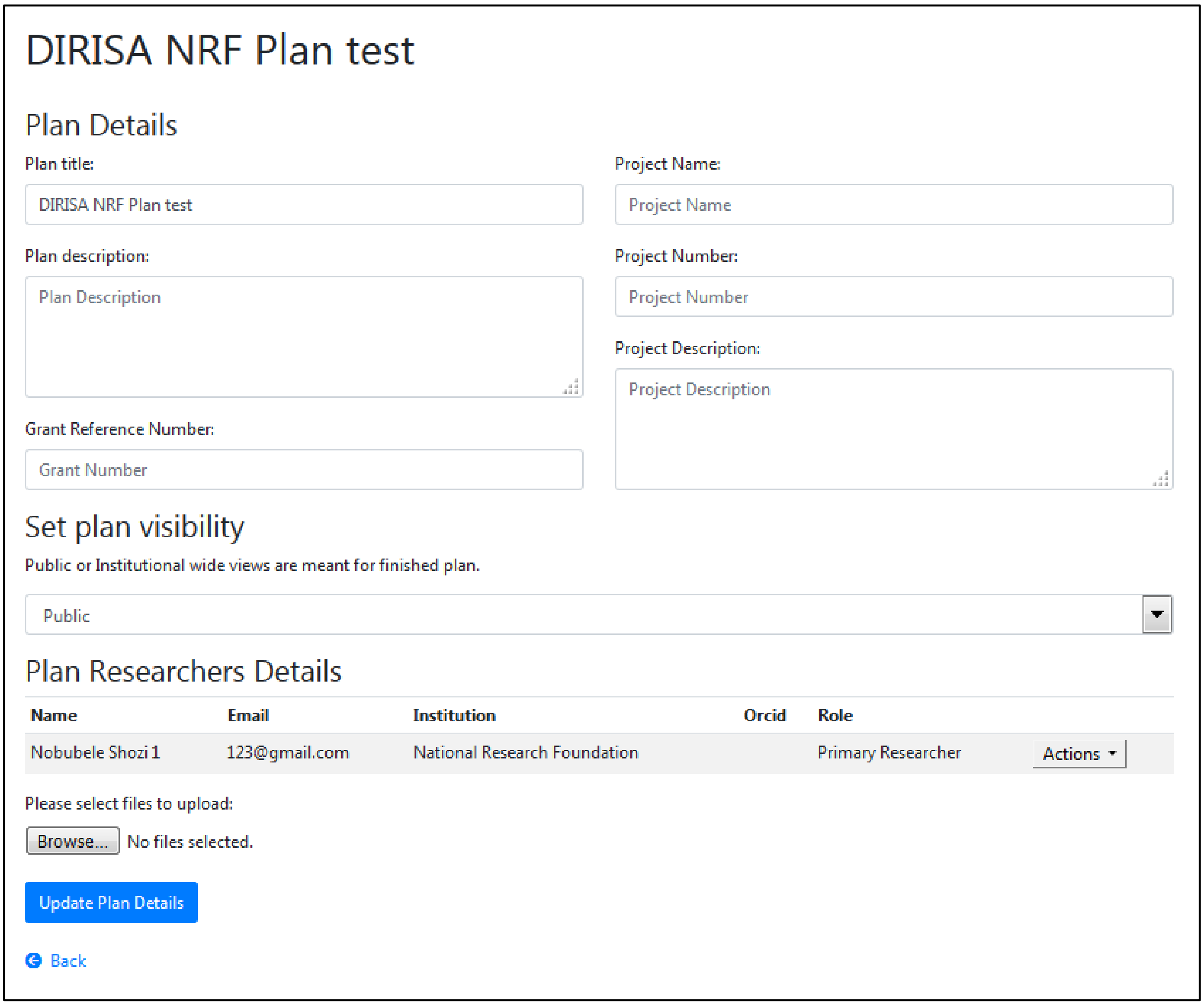


Figure 5: View Plan Details

You can be able to update all the plan information. If you have uploaded any documents, you can be able to view these or delete them. You can also be able to add any more researchers to the plan. You can also change the plan visibility.

Once you have updated the information, you can click on ‘Update Plan Details’ to save all your changes.

5. Share Plan

To share a plan, click on ‘Share Plan’ in the Actions button.

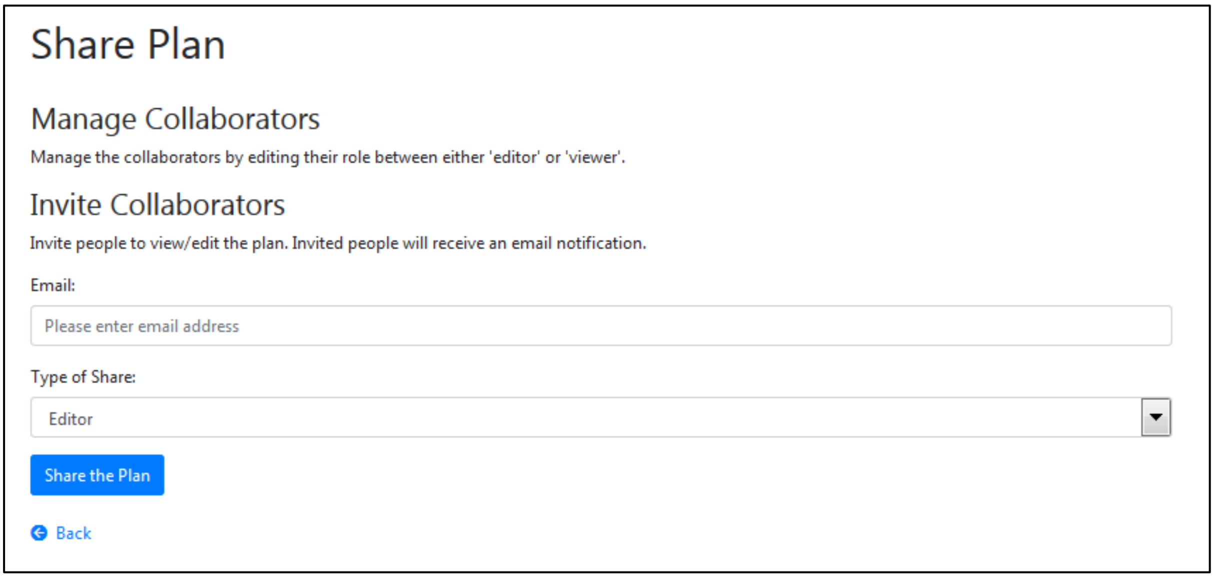


Figure 6: Share Plan (1)

By clicking share a plan, you can be able to share your plan with other researchers. When you share a plan there are two roles – editor and viewer. The editor is able to edit the plan along with you. The viewer is only able to download the plan.

To share a plan, enter the person’s email address and choose the type of share. Click on ‘Share Plan’. When plan is shared it will be listed under the ‘manage collaborators’ sections. This will then allow you to edit the share information.

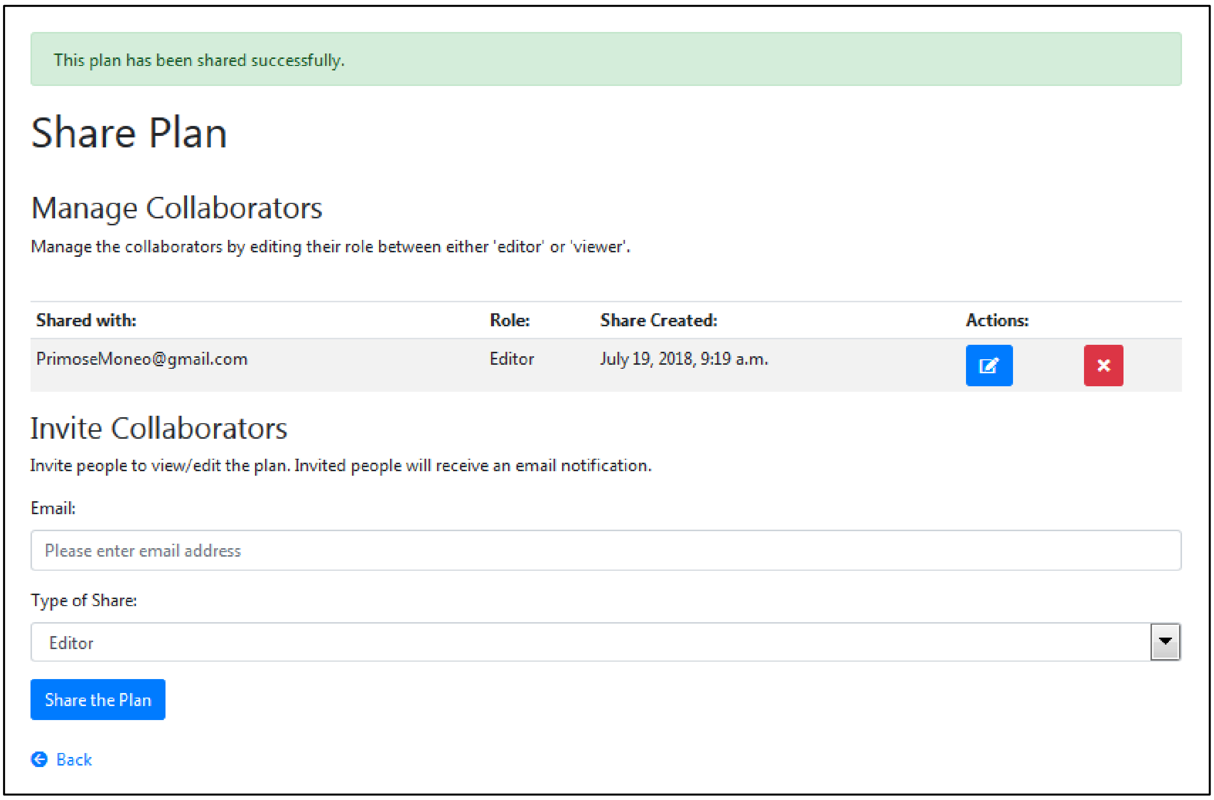


Figure 7: Share Plan (2)

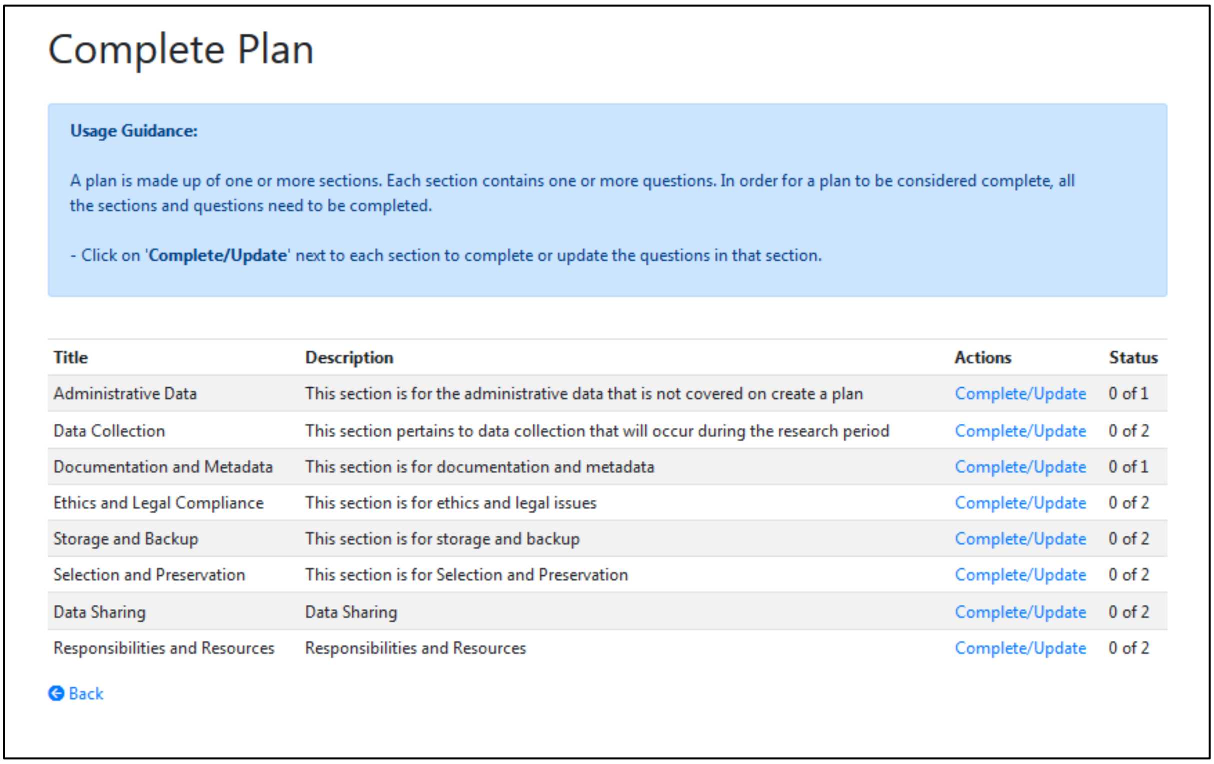
6. Navigation

To navigate back to the dashboard, there is a ‘back’ button in every page:

Figure 8: Back navigation

7. Complete Plan

To complete a plan, click on ‘Complete plan’ in the Actions button.



Complete Plan

Usage Guidance:

A plan is made up of one or more sections. Each section contains one or more questions. In order for a plan to be considered complete, all the sections and questions need to be completed.

- Click on '**Complete/Update**' next to each section to complete or update the questions in that section.

Title	Description	Actions	Status
Administrative Data	This section is for the administrative data that is not covered on create a plan	Complete/Update	0 of 1
Data Collection	This section pertains to data collection that will occur during the research period	Complete/Update	0 of 2
Documentation and Metadata	This section is for documentation and metadata	Complete/Update	0 of 1
Ethics and Legal Compliance	This section is for ethics and legal issues	Complete/Update	0 of 2
Storage and Backup	This section is for storage and backup	Complete/Update	0 of 2
Selection and Preservation	This section is for Selection and Preservation	Complete/Update	0 of 2
Data Sharing	Data Sharing	Complete/Update	0 of 2
Responsibilities and Resources	Responsibilities and Resources	Complete/Update	0 of 2

Back

Figure 9: Complete Plan (1)

Each plan is made up of plan sections, sections make it easier to group related questions together. Each section has questions that the researcher would need to answer.

For each section you can see the status. The status displays how many questions are in that section and how many have been answered. You can click on ‘Complete/Update’ to answer the questions for each section.

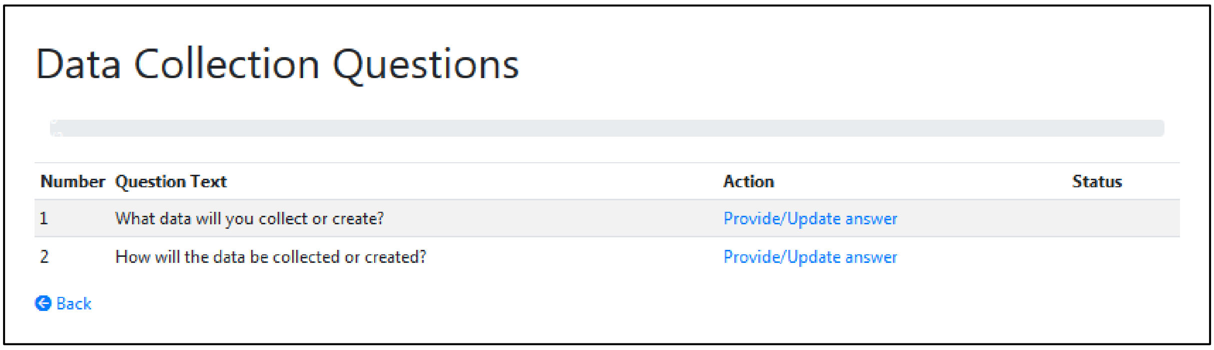


Figure 10: Complete Plan (2)

A progress bar is provided at the top to help you see how many questions have been answered. A status column is provided for each question to help you see if you have answered that questions, once a question is answered, a tick will appear to indicate that this questions is answered.

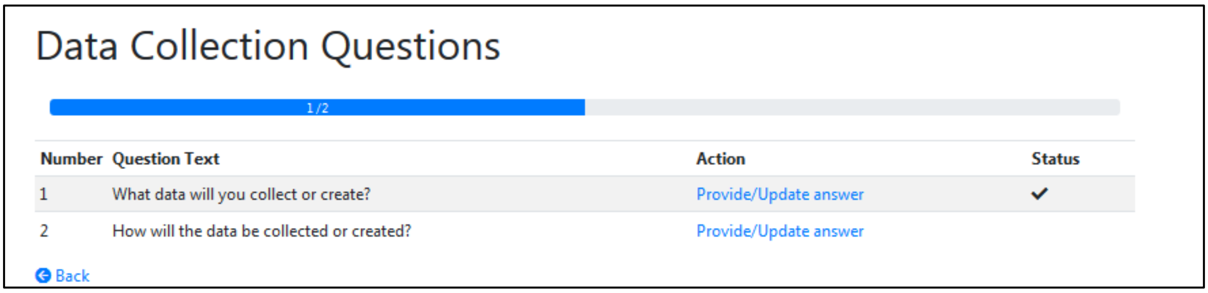


Figure 11: Complete Plan (3)

Some questions may contain what is known as components. Components allow you to provide more information when answering your questions. The SA-DMP Tool has four (4) components:

- **Data component**. Allows you to enter data components. For each dataset you need to provide the name of the data, the type of the data, what methodology it uses and what standard it uses. Each data type can also have specific requirements for bandwidth, computing and storage (these are explained in the next component description)

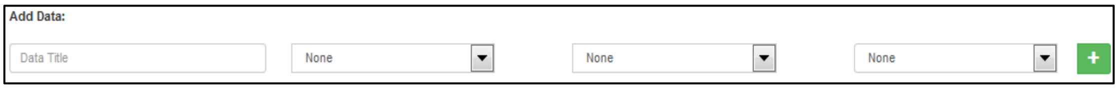


Figure 12: Data Component

- **Data Requirements component**. The data requirements components allows you to provide more information about the data component such as its storage requirements, its bandwidth requirements and computing requirements.

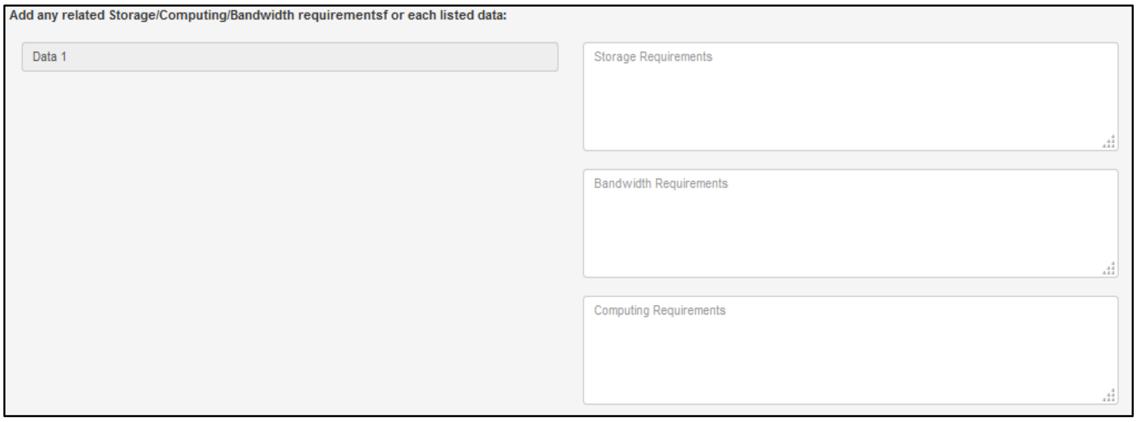


Figure 13: Data requirements Component

- **Licence selector component**. Allows you to select the different licences for each dataset.

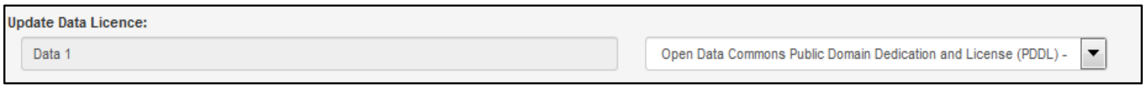


Figure 14: Licence selector component

- **Data View**. The view component allows you to see the datasets that you have entered.

8. Download

By clicking on 'Download', you can be able to download a plan in the following formats:

- PDF. This is the Portable Document Format (PDF). PDF creates documents that cannot be edited and can contain images and text.
- HTML Format. This is Hypertext Markup Language (HTML) which is a language that is used for creating web pages or web applications.
- Microsoft Word Document. This is a word document.
- Microsoft Excel Spreadsheet. This creates a excel spreadsheet.
- CSV File. This creates a .CSV file.

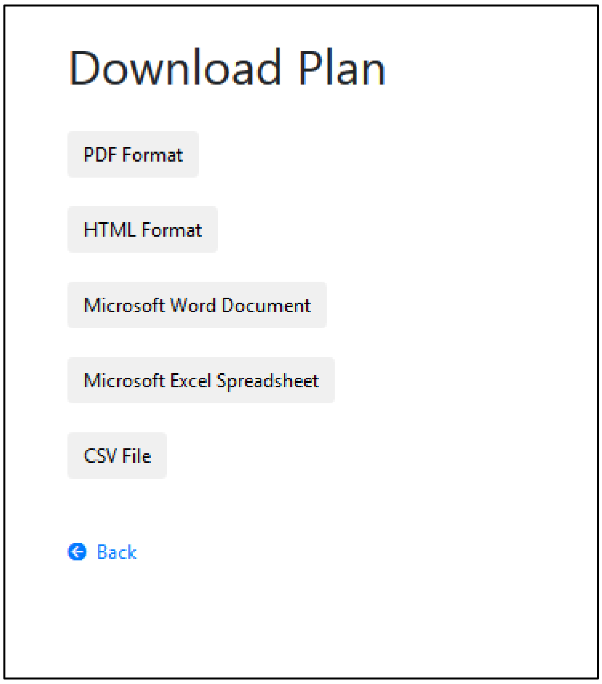


Figure 15: Download Formats

9. Delete

If you click on the ‘Delete’ action, you can be able to delete the plan. You will be asked if you are sure about deleting the plan. If you are sure, you can click on ‘OK’. If you are not sure, you can click on ‘Cancel’.

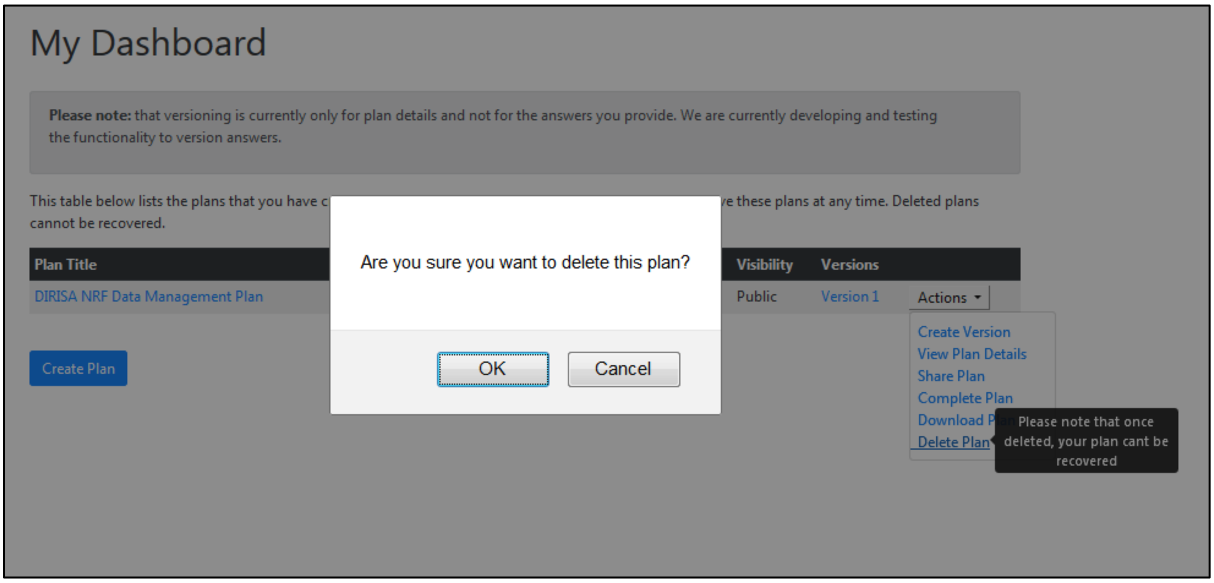


Figure 16: Delete a Plan

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