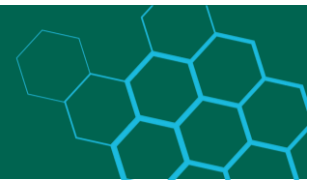




## RDMO Quick Guide for Researchers

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## What is RDMO?

The web-based software Research Data Management Organiser (RDMO) is an open-source software ( <https://rdmorganiser.github.io>). RDMO is used to create a data management plan as part of your research project. RDMO helps you plan projects and manage data management tasks throughout the data lifecycle. The basic framework of the data management plan is formed by the questionnaires contained in RDMO. The questionnaires are based on the specifications of the research funders.

## Log in

At RDMO of the RheinMain University of Applied Sciences, you can log in with your university account (HDS) in the upper right corner under "**Login**". If you do not yet have an HDS account or have lost your access data, please contact the ITMZ of RheinMain University of Applied Sciences.

## Overview: The start page

After logging in, you will find yourself on your start page, which provides you with the following overview:

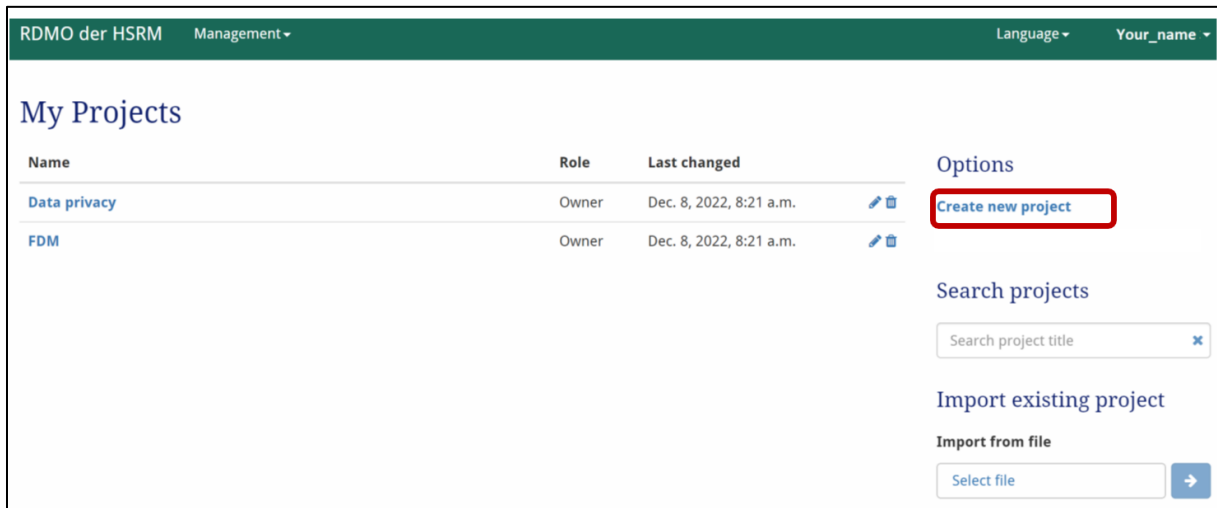
Name	Role	Last changed
Data privacy	Owner	Dec. 8, 2022, 8:21
FDM	Owner	Dec. 8, 2022, 8:21 a.m.

1. By clicking on the lettering " **RDMO der HSRM**" you will always get to this start page.
2. If you have the necessary rights, you can use the management menu to create or change questionnaires, for example, but this is not necessary to create a management plan.
3. Under "**My Projects**" you will find all data management plans that you have created yourself and to which you have been added. It also shows when the project was created. At the beginning, this overview will be empty.

4. Next to the data management plans there are icons, you can edit or delete the plans with the help of the icons on the right in the respective row. **Note:** Deleted data management plans cannot be recovered!
5. Under "**Options**" you can create new data management plans, search for projects or import existing projects.
6. At the top right you can select the language. You currently have the choice between German and English. In addition, your name will be displayed to the right of the language.

## Create a new data management plan

On the start page, under "Options" on the right, you will find the possibility: "**Create new project**" (area marked in red). This allows you to create a new data management plan.



The screenshot shows the RDMO der HSRM Management interface. At the top, there is a header with 'RDMO der HSRM', 'Management', 'Language', and 'Your\_name'. Below the header, the main content area is titled 'My Projects'. It features a table with columns for 'Name', 'Role', and 'Last changed'. The table contains two rows: 'Data privacy' and 'FDM', both with 'Owner' as the role and 'Dec. 8, 2022, 8:21 a.m.' as the last changed date. To the right of the table is an 'Options' menu with a red box around the 'Create new project' button. Below the options menu, there is a 'Search projects' section with a search input field and a 'Import existing project' section with an 'Import from file' button and a 'Select file' input field.

Name	Role	Last changed	Options
Data privacy	Owner	Dec. 8, 2022, 8:21 a.m.	<b>Create new project</b>
FDM	Owner	Dec. 8, 2022, 8:21 a.m.	

You must enter the following information in the mask:

- \* **Title:** Give the new DMP a significant name.
- \* **Description:** If necessary, provide a description for your plan to explain its purpose.
- \* **Catalog:** Select from the available questionnaires. You can also change the associated catalog later.
- \* **Superordinate project:** To be able to map more complex project structures, it is possible to create your own data management plan for a (sub-)project and link it to the higher-level project. Through the connection, various information can be transferred automatically.

## 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.

- HeFDI DMP RheinMain University of Applied Sciences (Version 1.0)
- data privacy concept RheinMain University of Applied Sciences

### Parent project

The parent project of this project.

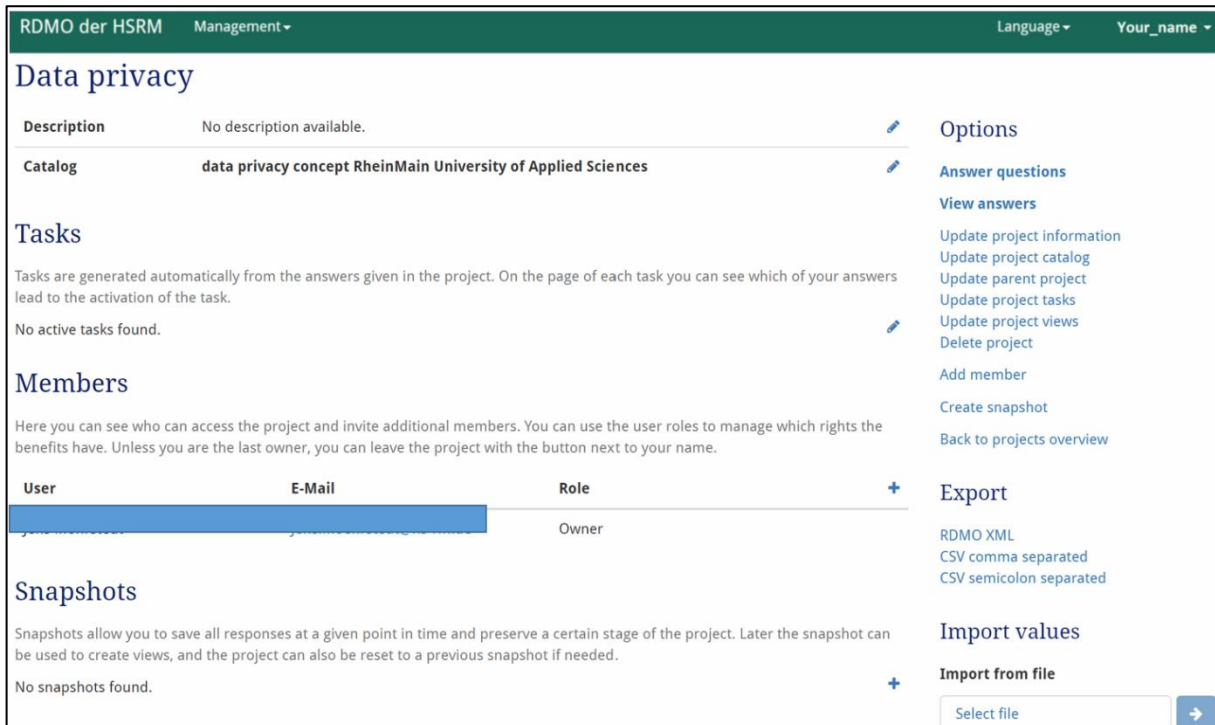
Create project

Cancel

## Answer questions

On the Start page, open the desired project by clicking the name of the project. Your newly created data management plan includes the following information:

- \* **Title, description and selected questionnaire**
- \* **Tasks:** Tasks are automatically generated 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.
- \* **Views:** A view is a template that determines how the answers given by the user are represented in a text document. For example, certain questions and their answers can be extracted, or the layout can be adjusted.
- \* **Memberships:** This is a list of all people who have access to the project. Each member is assigned specific rights to edit the project via a role.
- \* **Snapshots:** Snapshots represent versions of your data management plan that you can explicitly store. Specifically, your answers, which you have given at a certain time, are saved. In this area you will find an overview of all snapshots.



**RDMO der HSRM** Management Language Your\_name

## Data privacy

**Description** No description available.

**Catalog** data privacy concept RheinMain University of Applied Sciences

### 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.

No active tasks found.

### Members

Here you can see who can access the project and invite additional members. You can use the user roles to manage which rights the benefits have. Unless you are the last owner, you can leave the project with the button next to your name.

User	E-Mail	Role
		Owner

### 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.

No snapshots found.

#### Options

- Answer questions
- View answers
- Update project information
- Update project catalog
- Update parent project
- Update project tasks
- Update project views
- Delete project
- Add member
- Create snapshot
- Back to projects overview

#### Export

- RDMO XML
- CSV comma separated
- CSV semicolon separated

#### Import values

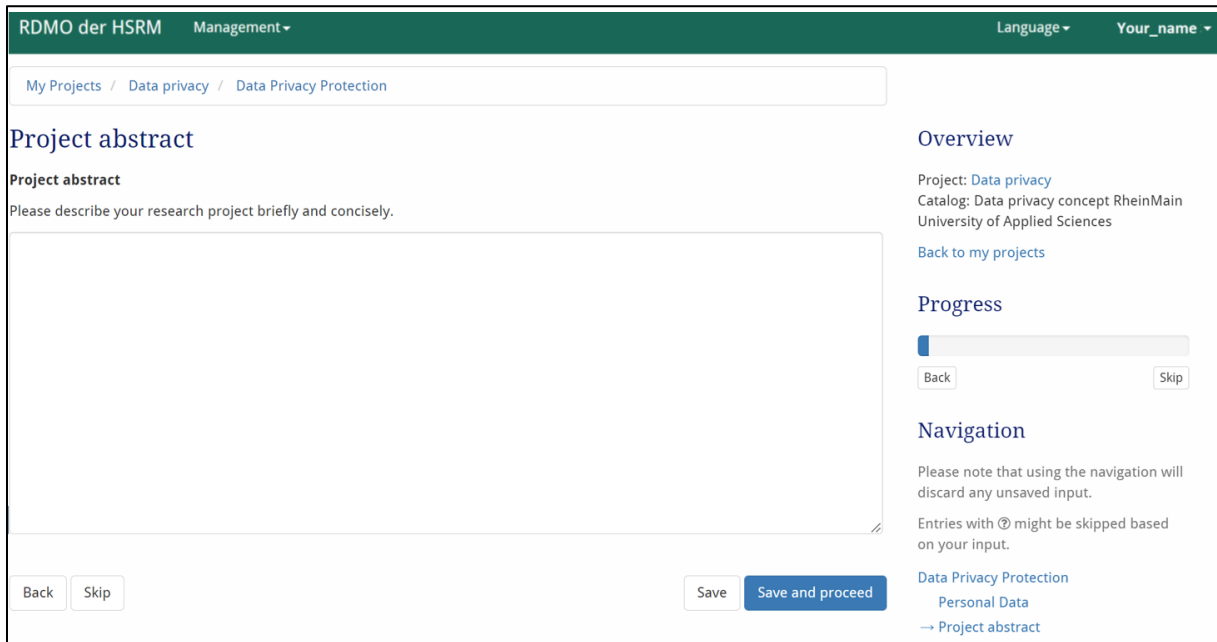
Import from file

Select file

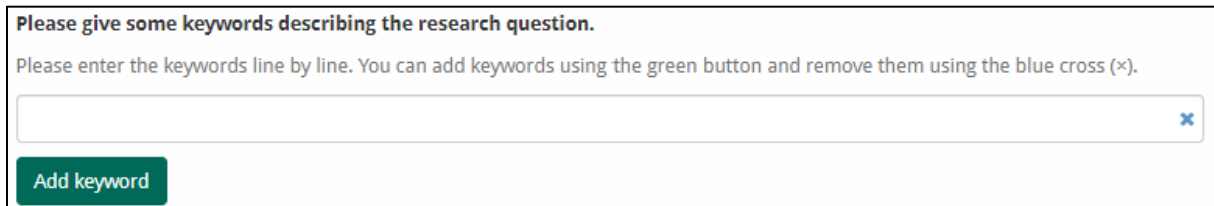
In the right pane under "**Options**" you get an overview of the possibilities to edit the project. For example, the title or description of the project (under "**Edit project information**") can be changed here. It is also possible to delete the project at this point.

**Attention:** The deletion process cannot be undone.

If you can click on "**Answer questions**", then the interview starts. You can skip any question to which you do not yet have an answer, or which generally seems irrelevant to your research project and, if necessary, answer it later. The overview on the right allows quick navigation between the topics.




Many questions can be answered as free text. The text field can be enlarged for detailed answers by clicking on the triangle in the lower right corner and dragging the field accordingly.

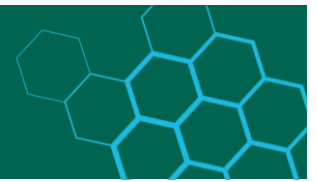


In the example above, keywords are also asked. By clicking on the green button "**Add keyword**", the answer can be extended by additional keywords.

At the bottom of each page of the questionnaire you will find the following options:

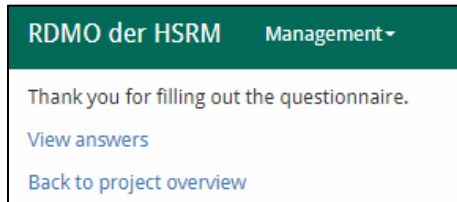


- \* **Back:** takes you back to the questions on the previous page.
- \* **Skip:** You can skip the questions on this page and answer them later.
- \* **Save:** Saves your entries and you remain on the page.
- \* **Save and proceed:** Save your entries and you will be redirected to the next page with questions.



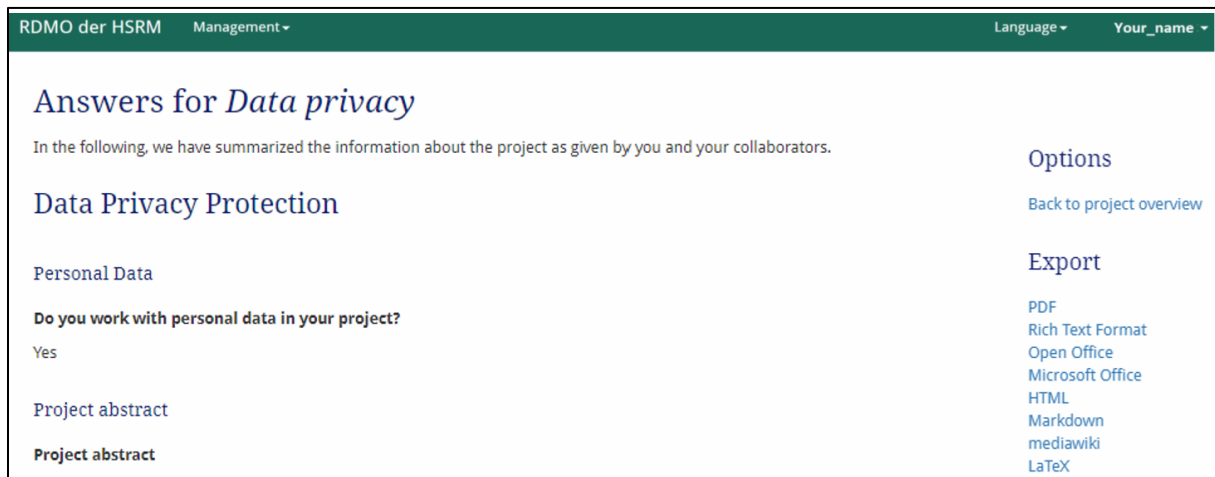
## View and export responses

Once you are through all the question pages, the following appears:



Here you can view the answers. If you select "**Back to Project**", you also have the option to display the answers under "**Options**" on the right.

You will now see the questions you answered as shown in the following screenshot. On the right side under "**Export**" you have the possibility to export your entered information in the following formats: PDF, Rich Text Format, Open Office, Microsoft Office, HTML, Markdown, mediawiki and LaTeX.



In the project overview, it is also possible to export the project in XML format or as a CSV table.

## Add member

To share your data management plan with others, you can add members. To do this, click on "**Add member**" (marked in red) in the right menu bar of your project overview and enter the person's user name or e-mail address.

It is then necessary to determine which role the newly added member receives. The roles determine the extent to which the member can edit the project.

- \* **Guest:** Has read-only permissions, so all replies are displayed in read mode.
- \* **Author:** Can answer questions and change answers.
- \* **Manager:** can make all settings in the project, export the project, import values, create snapshots
- \* **Owner:** have the same rights as you.

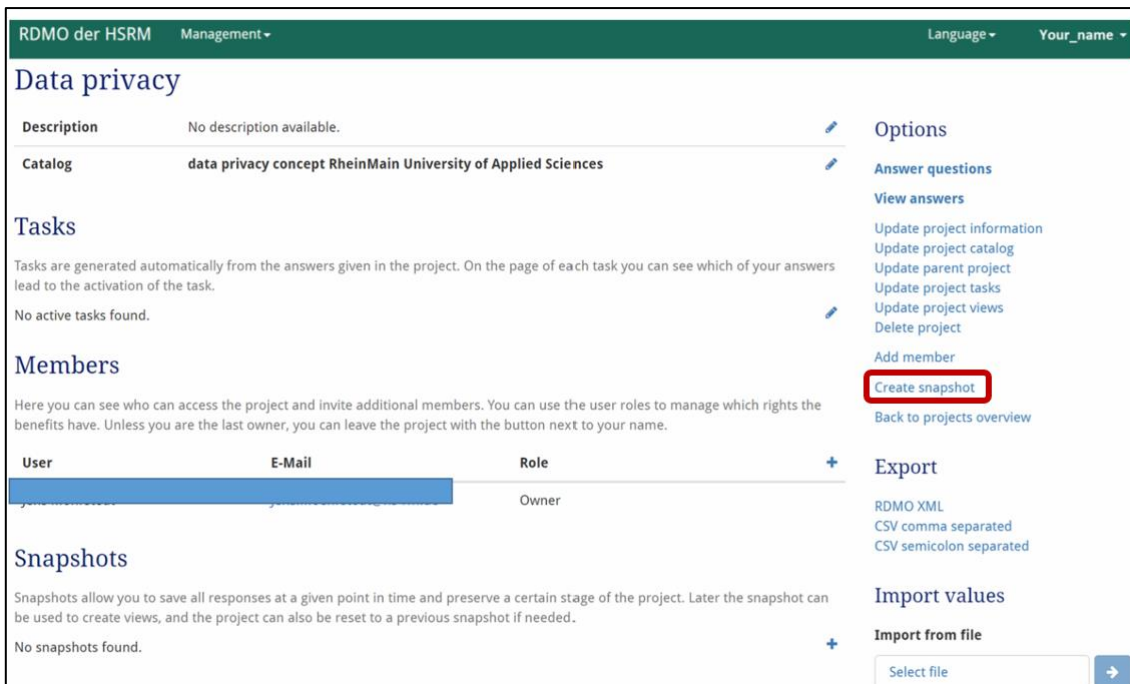


The members appear at the bottom of the project page and can also be edited (assigned a new role) or removed.

## Create snapshot

Once you've saved your responses, you can't revert to a previous version of your data management plan. For this reason, it is recommended to create snapshots. These are snapshots that save your current state of work so that you can refer to them later.







To do this, click on **"Create snapshot"** (marked in red) in the right menu bar of your project overview and provide the snapshot with a title and (optionally) with a description. The snapshots are listed in your project overview.



The screenshot shows the 'Data privacy' project overview page. The right-hand menu contains the following options: Options, Answer questions, View answers, Update project information, Update project catalog, Update parent project, Update project tasks, Update project views, Delete project, Add member, **Create snapshot** (highlighted in red), and Back to projects overview. Below the menu are sections for Export (RDMO XML, CSV comma separated, CSV semicolon separated) and Import values (Import from file).

Click the **"Eye"** icon next to the desired snapshot to view the previous responses. Use the **"Edit"** icon to change the snapshot title and description. The **"Back"** icon in the editing options can be used to restore a snapshot.

**! Attention: If a snapshot is restored, all previous changes are lost.**

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.			
Snapshot	Description	Created	
V2.0	Second save	Dec. 8, 2022, 1:06 p.m.	  
V1.0	First save	Dec. 8, 2022, 1:06 p.m.	  







## Import or export a project

You can import or export your RDMO projects at any time to create a local backup or to use it in other instances of RDMO.

To export a project, open the desired project on the start page. Select **RDMO XML** from the menu on the right under **Export**. Then save the XML file in a directory of your choice.

To import a project, open on the start page. Select "**Choose File**" from the "**Import**" menu on **the right** and open the desired XML file. Then click on the "**arrow**" button to import your project.

### My Projects

Name	Role	Last changed	
Data privacy	Owner	Dec. 8, 2022, 1:15 p.m.	 
Data privacy	Owner	Dec. 8, 2022, 1:14 p.m.	 
FDM	Owner	Dec. 8, 2022, 8:21 a.m.	 


Options

[Create new project](#)

Search projects

Import existing project

Import from file

***! Attention: Projects with the same name are not replaced during import, instead a new project is created.***

## Import projects from other RDMO instances

When importing projects from other RDMO instances, only the answers and not the catalogs are transferred, i.e. only the questions or answers that are available in both environments are taken into account.