

RDMO

Ein Werkzeug zur Planung, Umsetzung und der Verwaltung des

RUB

RDMO

A tool to support the planning, implementation, and organisation of research data management.

RUHR-UNIVERSITY BOCHUM

# Research Data Management Organiser

Tutorial



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# What is RDMO?

The **Research Data Management Organiser** (RDMO) uses a structured interview to guide you through all the important aspects of your data management. Your answers will be then turned into a data management plan.

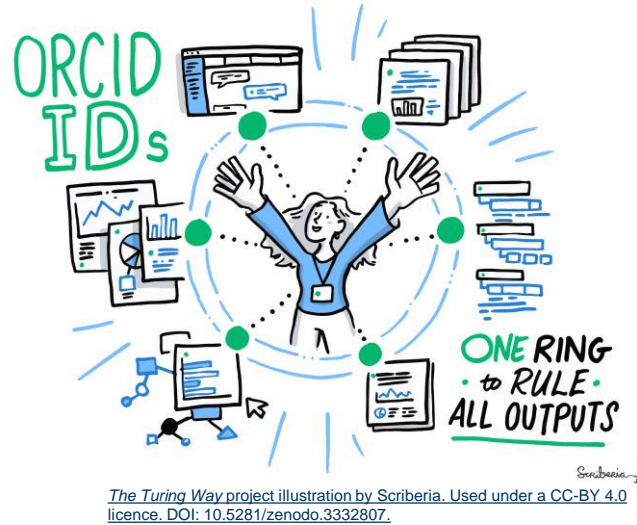


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**First steps: Log in to RDMO**

## RDMO login via ORCID

Login to RDMO takes place via [ORCID.org](https://orcid.org). You therefore need an ORCID account to use it.



It enables a shared use among three UA Ruhr universities. Information on ORCID and account creation can be found on the [ORCID website of the University Library](#).

# RDMO login via ORCID

1. Click on the Orcid.org button on the [front page](#).
2. You are redirected to the ORCID service. Select **“Access through your institution”** to log in with your university ID.
3. *Only at the first login:* You are then guided through the linking process. If you do not have an ORCID yet, you can register one.
4. You are redirected back to RDMO. Confirm the Terms of Use and create an account on RDMO by entering your email address and username.

Sign in


Email or 16-digit ORCID iD  
example@email.com or 0000-0001-2345-6789


Password


**SIGN IN**

Forgot your password or ORCID ID?  
Don't have an ORCID iD yet? [Register now](#)

or

 **Access through your institution**

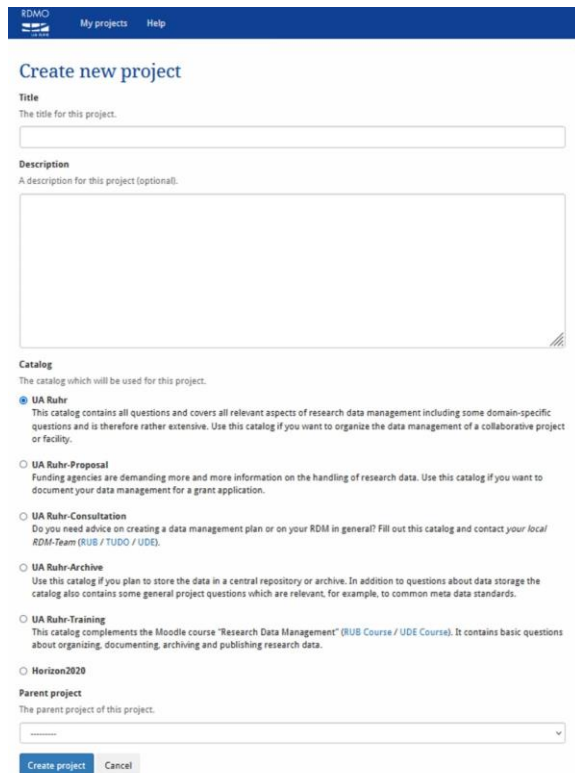
 **Sign in with Google**

 **Sign in with Facebook**

**Create your first project**

# Create your first project

1. After logging in, choose the option “Create new project”.
2. Enter a title and a short description of the project.
3. Choose the **preferred catalogue** (more information on slide 30). You can change the chosen catalogue at any time later, by editing the project information.
4. Optional: Select a parent project out of your existing projects to take over its content. You can find more information about that under **Select a parent project** (Slide 22).
5. Confirm your settings with the “Create project” button.



The screenshot shows the 'Create new project' form in the RDMO interface. The form is titled 'Create new project' and is located in a blue header bar. The form contains several sections: 'Title' with a text input field; 'Description' with a large text area; 'Catalog' with a list of radio buttons and descriptions for different catalogues; and 'Parent project' with a dropdown menu. At the bottom of the form are two buttons: 'Create project' (highlighted in blue) and 'Cancel'.

**RDMO** My projects Help

## 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.

- UA Ruhr**  
This catalog contains all questions and covers all relevant aspects of research data management including some domain-specific questions and is therefore rather extensive. Use this catalog if you want to organize the data management of a collaborative project or facility.
- UA Ruhr-Proposal**  
Funding agencies are demanding more and more information on the handling of research data. Use this catalog if you want to document your data management for a grant application.
- UA Ruhr-Consultation**  
Do you need advice on creating a data management plan or on your RDM in general? Fill out this catalog and contact your local RDM-Team (RUB / TUDO / UDE).
- UA Ruhr-Archive**  
Use this catalog if you plan to store the data in a central repository or archive. In addition to questions about data storage the catalog also contains some general project questions which are relevant, for example, to common meta data standards.
- UA Ruhr-Training**  
This catalog complements the Moodle course "Research Data Management" (RUB Course / UDE Course). It contains basic questions about organizing, documenting, archiving and publishing research data.
- Horizon2020**

**Parent project**  
The parent project of this project.

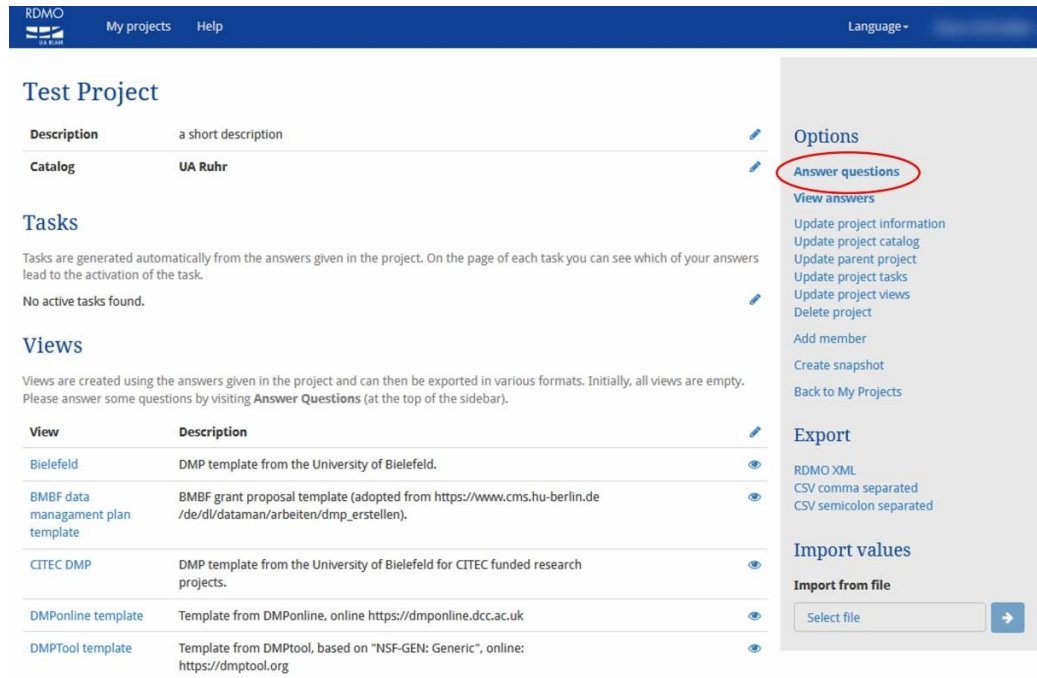
**Create project** Cancel



- **Start the interview**
- **View the DMP**
- **Use snapshots**

# Start the interview

1. Select a project from the front page.
2. In the menu on the right, select “Answer questions”.
3. The interview starts.



The screenshot shows the RDMO interface for a 'Test Project'. The main content area is divided into sections: Description, Catalog, Tasks, and Views. The right sidebar contains a menu with 'Answer questions' circled in red. Below the menu are sections for 'Export' and 'Import values'.

Description	
a short description	
Catalog	UA Ruhr

### 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.

### Views

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).

View	Description
Bielefeld	DMP template from the University of Bielefeld.
BMBF data management plan template	BMBF grant proposal template (adopted from <a href="https://www.cms.hu-berlin.de/de/dl/dataman/arbeiten/dmp_erstellen">https://www.cms.hu-berlin.de/de/dl/dataman/arbeiten/dmp_erstellen</a> ).
CITEC DMP	DMP template from the University of Bielefeld for CITEC funded research projects.
DMPonline template	Template from DMPonline, online <a href="https://dmponline.dcc.ac.uk">https://dmponline.dcc.ac.uk</a>
DMPTool template	Template from DMPtool, based on "NSF-GEN: Generic", online: <a href="https://dmptool.org">https://dmptool.org</a>

**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 My Projects

**Export**

- RDMO XML
- CSV comma separated
- CSV semicolon separated

**Import values**

Import from file

*You can skip any question that is either irrelevant to your project or not answerable at this point and come back at a later time.*



# Start the interview

- With a structured interview, RDMO helps you to process all the important parts of your data management in a simple way.
- Questions can be skipped / answered later.




The screenshot shows the RDMO web interface. At the top, there is a navigation bar with 'RDMO' logo, 'My projects', 'Help', 'Back to project', and 'Language'. The main content area is titled 'Questionnaire' and 'Technical classification / Data size'. It includes a dataset list with 'dataset1' and an 'Add dataset' button. A question asks 'What is the actual or expected size of the dataset?' with radio button options: 'less than 1 GB', '1 GB to 1 TB', '1 TB to 100 TB', 'more than 100 TB', 'exact size: [input]', and 'not yet defined'. Below this is another question: 'How much data is produced per year?' with a text input field and 'Optional. This is only of concern if the data production rate reaches TB scale.' At the bottom of the form are 'Back', 'Skip', 'Save', and 'Save and proceed' buttons. On the right side, there is a 'Navigation panel' with sections for 'Overview' (Project: Test Project, Catalog: UA Ruhr), 'Progress' (a progress bar and 'Back', 'Skip', 'Save', 'Save and proceed' buttons), and 'Navigation' (a list of menu items: General, Content classification, Technical classification, Date collection, Data size, Formats, Tools, Versioning, Data usage, Metadata and referencing, Legal and ethics, Storage and long-term preservation, and Back to My Projects). A green arrow points from the 'Navigation panel' label to the right side of the interface.

Navigation panel

# Create a data management plan

1. Select a project from the front page.
2. You can find a list of different templates under **“Views”**, for example a template for a Horizon or a BMBF data management plan.
3. Open the desired template by clicking the eye icon next to it.

## Views

View	Description	
<a href="#">DMPonline template</a>	Template from DMPonline, online <a href="https://dmponline.dcc.ac.uk">https://dmponline.dcc.ac.uk</a>	
<a href="#">DMPTool template</a>	Template from DMPTool, based on "NSF-GEN: Generic", online: <a href="https://dmptool.org">https://dmptool.org</a>	
<a href="#">Horizon 2020 FAIR Data Management Plan template</a>	Template for Horizon 2020, from "Guidelines on FAIR Data Management in Horizon 2020", online: <a href="http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/oa_pilot/h2020-hi-oa-data-mgt_en.pdf">http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/oa_pilot/h2020-hi-oa-data-mgt_en.pdf</a>	

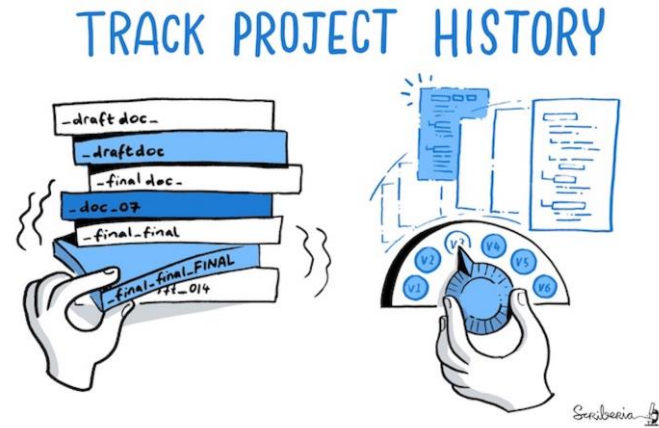
# Create a data management plan

- You can see the result in the following window.
- It is also possible to export the template in different file formats (e.g. Microsoft Word, LaTeX, rtf, pdf) using the menu on the right.

The screenshot shows the RDMO (Research Data Management Office) interface. At the top, there is a dark blue header with the RDMO logo and the text 'Meine Projekte'. On the right side of the header, there is a 'Sprache' dropdown menu. The main content area is titled 'Horizon 2020' and contains a section '1. Data Summary'. Below this section, there is a question: 'What is the purpose of the data collection/generation and its relation to the objectives of the project?'. The text of the answer is mostly blurred. On the right side of the interface, there is a sidebar menu with the following items: 'Snapshots', '→ Aktuell', 'Version 1', 'Optionen', 'Zurück zum Projekt', and 'Export'. The 'Export' option is circled in red. Below 'Export', there is a list of file formats: PDF, Rich Text Format, Open Office, Microsoft Office, HTML, Markdown, mediawiki, and LaTeX.

## Using snapshots

Snapshots save your answers at a specific time. You can therefore create **different versions** of your project and generate updated versions, as for instance required for Horizon projects. If necessary, you can also reset your project **to previous snapshots.**



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# Using snapshots

1. Select a project from the front page.
2. Choose the option “Create snapshot” from the menu on the right.
3. Next, enter a name and a description.
4. You can then find a list of your snapshots with their respective creation dates under “Snapshots” on the project page.

The screenshot shows the RDMO interface for a project named 'Test Project'. The top navigation bar includes 'RDMO', 'My projects', 'Help', and a 'Language' dropdown. The main content area is divided into sections: 'Description' (a short description), 'Catalog' (UA Ruhr), 'Tasks' (No active tasks found), and 'Views' (a table of templates). On the right side, a sidebar menu contains options like '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 with a red circle), 'Back to My Projects', 'Export' (RDMO XML, CSV comma separated, CSV semicolon separated), and 'Import values' (Import from file with a 'Select file' button).

View	Description
Bielefeld	DMP template from the University of Bielefeld.
BMBF data management plan template	BMBF grant proposal template (adopted from <a href="https://www.cms.hu-berlin.de/de/dl/dataman/arbeiten/dmp_erstellen">https://www.cms.hu-berlin.de/de/dl/dataman/arbeiten/dmp_erstellen</a> ).
CITEC DMP	DMP template from the University of Bielefeld for CITEC funded research projects.
DMPonline template	Template from DMPonline, online <a href="https://dmponline.dcc.ac.uk">https://dmponline.dcc.ac.uk</a>
DMPTool template	Template from DMPtool, based on "NSF-GEN: Generic", online: <a href="https://dmptool.org">https://dmptool.org</a>

# View snapshots

You can view your previous snapshots with the snapshot overview. It is also possible to view the different versions of your data management plan.

1. Select a project from the front page.
2. Scroll down to the snapshot overview.
3. Select the eye-symbol next to the snapshot you would like to view.
4. On the following page, you can switch between the snapshot and the present view.
5. If you would rather see the data management plan of a previous snapshot you can open the corresponding **view**. Here you can switch between current version and snapshot, too.

## Snapshots

Snapshot	Description	Created	
Version 1		May 24, 2019, 4:27 p.m.	  




# Restore a snapshot

In addition to viewing an earlier version of a project, you can also reset the project to a specific state.

**!** **Warning:** Resetting a project will delete all changes since the latest snapshot.

1. Go to the snapshot overview.
2. Select the arrow-symbol next to the snapshot to restore the project.
3. Confirm the recovery.

## Snapshots

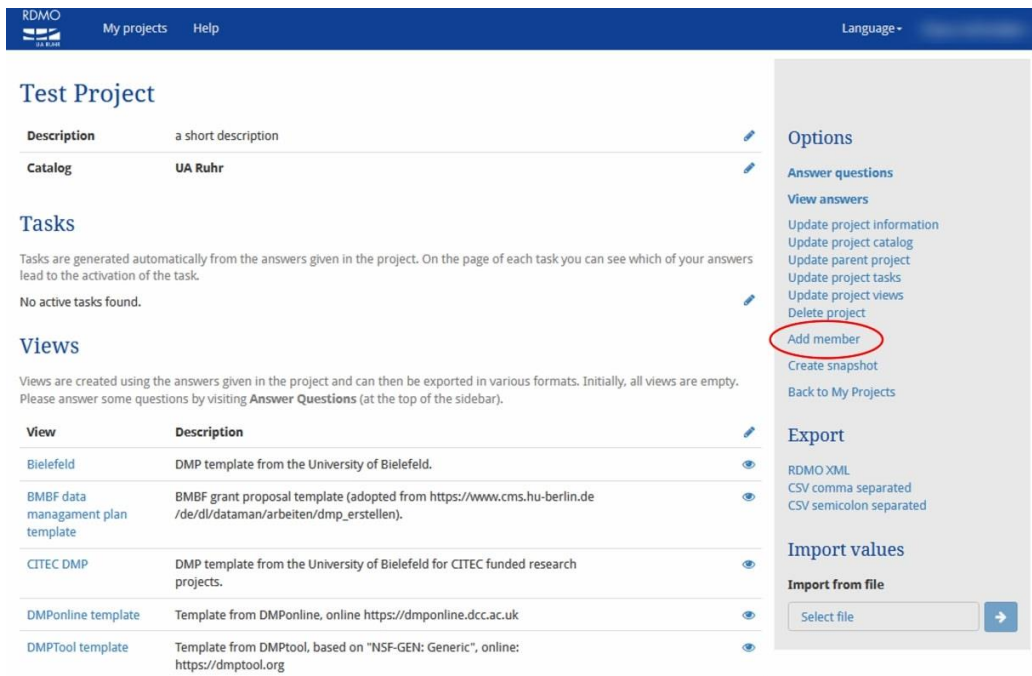
Snapshot	Description	Created	
Version 1		May 24, 2019, 4:27 p.m.	

**Handle members**

# Handle members

## Invite a new member

1. Select a project from the front page.
2. Choose the option “Add member” from the menu on the right.
3. On the next page, enter the e-mail address of the new member and select the desired role for them.



The screenshot shows the RDMO interface for a project named 'Test Project'. The top navigation bar includes 'RDMO', 'My projects', 'Help', and 'Language -'. The main content area is divided into sections: 'Description' (a short description), 'Catalog' (UA Ruhr), 'Tasks' (No active tasks found), and 'Views' (a table of views). On the right side, there is a sidebar menu with options like 'Options', 'Answer questions', 'View answers', 'Add member' (highlighted with a red circle), 'Export', and 'Import values'. The 'Add member' option is circled in red.

View	Description
Bielefeld	DMP template from the University of Bielefeld.
BMBF data management plan template	BMBF grant proposal template (adopted from https://www.cms.hu-berlin.de/de/dl/dataman/arbeiten/dmp_erstellen).
CITEC DMP	DMP template from the University of Bielefeld for CITEC funded research projects.
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Only users registered in RDMO can be invited as project members.

# User rights

- **Guest:** All answers are displayed as read-only.
- **Author:** Can edit questions and answers, but can't change any project settings.
- **Manager:** Can change all settings, invite new members, export the project, and create snapshots.
- **Owner:** Owners may also delete the project.









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## Edit or remove members

1. Select a project from the front page.
2. Scroll down to the list of project members.

### Members

User	E-Mail	Role	
John Doe	john.doe@rub.de	Author	 
Jane Smith	jane.smith@rub.de	Owner	 
Mark Johnson	mark.johnson@rub.de	Author	 
Anna Müller	anna.mueller@rub.de	Guest	



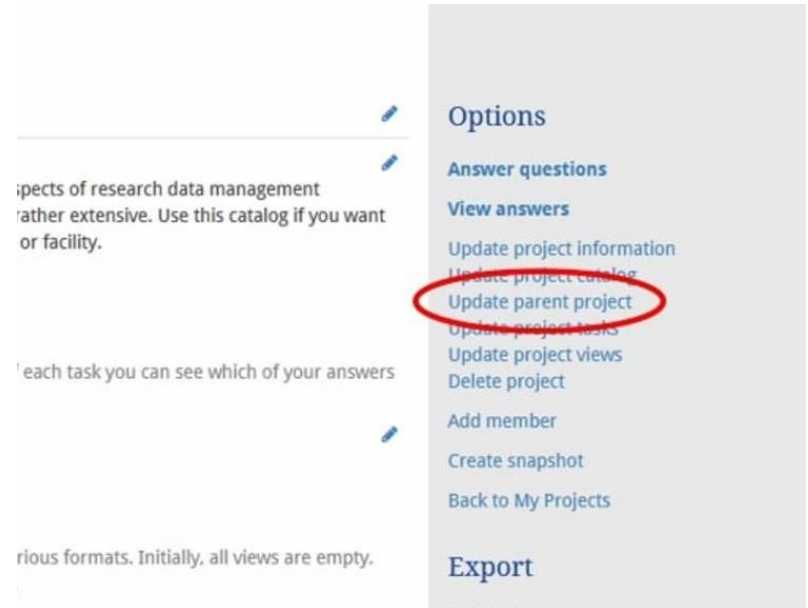
You can adjust the rights of each member by selecting the pen-symbol or remove a member with “X”.

**Select a parental project**

## Select a parental project

To transfer your answers from one of your existing projects to your current project, you can define a parent project.

1. Select one of your projects either by creating a new project (point 4) or in the menu on the right under **“Update parent project”**.



# Select a parental project

2. Confirm importing the content of your parent project in the menu on the right under “Import from parent project”.
3. Import answers from the parental project.

The screenshot shows the RDMO interface for a project named 'Test Project'. The main content area includes sections for Description, Catalog, Project hierarchy, Tasks, Views, and Members. The sidebar on the right contains various options, with 'Import from parent project' highlighted by a red circle. Below this option, a dropdown menu is visible, showing 'Parent Test Project' as the selected option.

**Test Project**

**Description** No description available.

**Catalog** UA Ruhr

**Project hierarchy** Parent Test Project  
• Test 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.  
No active tasks found.

**Views**  
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).  
No views are configured for this project.

**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

**Snapshots**

**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 My Projects

**Export**

- RDMO XML
- CSV comma separated
- CSV semicolon separated

**Import values**

**Import from file**

Select file

**Import from parent project**

Parent Test Project



**Import / export a project**

# 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.

1. Select a project from the front page.
2. Navigate to the option “Export” from the menu on the right and choose “RDMO XML”.
3. Save the XML file in a directory of your choice.

The screenshot shows the RDMO interface for a project named 'Test Project'. The top navigation bar includes 'RDMO', 'My projects', 'Help', and 'Language'. The main content area is divided into sections: 'Description' (a short description), 'Catalog' (UA Ruhr), 'Tasks' (No active tasks found), and 'Views' (a list of templates). On the right, a sidebar contains 'Options' and 'Answer questions' sections. The 'Export' option is highlighted with a red circle.

View	Description
Bielefeld	DMP template from the University of Bielefeld.
BMBF data management plan template	BMBF grant proposal template (adopted from https://www.cms.hu-berlin.de/de/dl/dataman/arbeiten/dmp_erstellen).
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DMPonline template	Template from DMPonline, online https://dmponline.dcc.ac.uk
DMPTool template	Template from DMPTool, based on "NSF-GEN: Generic", online: https://dmptool.org

**Export**

- RDMO XML
- CSV comma separated
- CSV semicolon separated

**Import values**

**Import from file**

Select file

## Import a project

1. Go to the front page.
2. Navigate to the option “Import existing project” from the menu on the right. Click on “Select file” and open the XML file that contains your project.
3. Click on the “Upload” button to import your project.

Name	Role	Last changed
Test Project	Owner	Jan. 18, 2021, 11:26 a.m.



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

## Import the projects from another RDMO instance

In general, an import of a project from another RDMO instance is possible. However, upon import **only answers to the questions** are transferred, not the question catalog itself, i.e. only the answers that are available in both instances are taken into account.



*This illustration is created by Scriberia with The Turing Way community. Used under a CC-BY 4.0 licence. DOI: [10.5281/zenodo.3332807](https://doi.org/10.5281/zenodo.3332807)*

# Delete a project

By deleting a project, all information about the project is removed from the database.

1. Select a project from the front page.
2. In the menu on the right, select “Delete project” to delete the project.
3. Confirm that you agree with completely deleting the project.



Deleting a project cannot be reversed. If necessary, create a backup of your project by [exporting your project data](#).

The screenshot shows the RDMO interface for a project named 'Test Project'. The top navigation bar includes 'RDMO', 'My projects', 'Help', and 'Language -'. The main content area is divided into sections: 'Description' (a short description), 'Catalog' (UA Ruhr), 'Tasks' (No active tasks found), and 'Views' (a table of templates). The right sidebar contains a menu with options like 'Options', 'Answer questions', 'View answers', 'Update project information', 'Update project catalog', 'Update parent project', 'Update project tasks', 'Update project views', 'Delete project' (circled in red), 'Add member', 'Create snapshot', 'Back to My Projects', 'Export' (RDMO XML, CSV comma separated, CSV semicolon separated), and 'Import values' (Import from file).

View	Description
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**Which catalogue is the  
best for you?**

# Which catalogue is the best for you?

## Short description

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UA Ruhr-Consultation

Do you need advice on creating a [data management plan](#) or on your RDM in general? Fill out this catalogue and [contact us](#).

---

UA Ruhr-Application

Funding agencies are demanding more and more information on the handling of research data. Use this catalogue if you want to document your data management for a grant application.

---

UA Ruhr-Archiving

Use this catalogue if you plan to store the data in a central repository or archive. In addition to questions about data storage the catalog also contains some general project questions which are relevant, for example, to common meta data standards.

---

UA Ruhr-Training

This catalogue complements the Moodle course "[Research Data Management](#)". It contains basic questions about organizing, documenting, archiving and publishing research data.

---

# Which catalogue is the best for you?

## Short description

---

UA Ruhr

This catalogue contains all questions and covers all relevant aspects of research data management including some domain-specific questions and is therefore rather extensive. Use this catalog if you want to organize the data management of a collaborative project or facility.

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Horizon Europe

This catalog is specifically adapted to EU funding applications under Horizon Europe.

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DFG-Checklist

Catalogue according to the DFG checklist of 21.12.2021.

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**Contact**

# Services for research data

- **E-Mail:** [researchdata@ruhr-uni-bochum.de](mailto:researchdata@ruhr-uni-bochum.de)
- **Phone:** +49 (0)234 32-24800
- [Mailing list on topic of research data](#)
- More information under <https://www.ruhr-uni-bochum.de/researchdata/contact.html>



Do you need technical support for RDMO?

Contact our team at [fdm-helpdesk@ruhr-uni-bochum.de](mailto:fdm-helpdesk@ruhr-uni-bochum.de)



IT.SERVICES

# Image sources

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