DMP Editor Help

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Logging In and Out

How to Log in

To access DMP editor, go to https://my.usgs.gov/dmpeditor/, click on **Login** in the top right corner

- **For DOI Users:** Username is your email address and your password is your Active Directory password
- **For non-DOI users:** Username is your email address and your password is your myUSGS password

Requesting a New DMP User Account for Non-DOI Users

- To request a non-DOI user account, go to: https://my.usgs.gov/dmpeditor/ and click on the **Click here** link on the bottom left next to the log in, to request a user account

- You will proceed to the Account Query Form page

- Fill in all of the requested information and select **Submit**

- You will receive an email from myUSGS within 24 hours with your new user account information.

Forgotten Password

- **Non-DOI users:** You can reset your password at https://my.usgs.gov/home/resetPassword
- **DOI users:** Please use your Department of Interior email address and your Active Directory password to log in

How to Log Out

- To log out, click on **Logout** in the top right corner of the page

Viewing Your DMPs

- Log in to the DMP site as described above

- Click on **DMP List** to see the DMPs that you have access to

Sorting Columns

- From the DMP List you can sort columns by the **ID number**, **Project Name** or any of the other headings along the top of the table by clicking on the heading to sort/unsort

  When clicking the header you will sort each list alphabetically or numerically, and if you click it again it will do it in the reverse order

Searching

- To perform a search, click in the search box and enter a term, title or keyword

- For DMP Editor Managers (Admin), Data Stewards, and Organization Managers, there is a link to an advanced search directly below the search box which will take you to **DMP Advanced Search** page. This search supports lucene search syntax that are often 'simply used' by using the connective words 'AND' 'OR'. If you search on Wild Horses, it will return DMPs that contain the words Wild AND Horses. You can narrow your results by adding **Organizations**, **Records** and **Project Names** filters. The connective word 'OR' is used with multiple selections within the filter. The connective word 'AND' between each filter. If you search on Wild Horses adding **Organizations, Southeast Climate Science Center(SE CSC**) OR **Western Ecological ResearchCenter** (**WERC)** as well as the **Records, New Collection filters.** You will return records containing the words Wild AND Horse which will be filtered within **Organizations, (SE CSC**) OR (**WERC)** and **Records, New Collection.**

  However, the link below goes into detail on how to use the lucene reserved characters to create powerful searches:
  The reserved characters are: + - = && || > < ! ( ) { } [ ] ^ " ~ * ? : \ /

  For a guide on how to use lucene click **Here**.

  Once you have completed your search, the results may be exported as a JSON file or a CSV file. The links to export are at the bottom left of the search results. If there are multiple results, you may need to scroll to the bottom of the page to access the links.

How to Edit DMPs

Simple Edits

- From the DMP List page, click on the **Project Name**/title for that project
- To edit the DMP show page, click **Edit**, or to edit an individual record click on that record
- The **ScienceBase's Project ID** is the unique identifier for the project record in ScienceBase
- The **RFP Manager's ID** and **RFP Manager's Stamp ID** are unique identifiers obtained from the RFP Manager tool during the proposal process

Note: From the DMP show page, a PI can only edit the Co-PIs, add or edit records, and edit the Permission Also Granted To fields. The remainder of the fields is only editable by Admins and Data Stewards.

- To delete a DMP, click **X Delete**
- To delete a record within the DMP, click on the record located in the **Records** section to open it
- Click **Delete** to delete just this record within the DMP

Adding Co-PIs

- From the DMP Show page, click **Edit** in the bottom left corner
- Next, either click on the drop-down arrow or begin typing the name of the Co-PI in the **Co-PI** field, to see if they are already in the list
- If the Co-PI does not exist in the drop-down list, select **+ Add New Co-PI**

Once **+ Add New Co-PI** is clicked, you are directed to the Create PI page. If they already have an account, the information will automatically populate when you enter their email address.

- If they do not have an account, you will need to fill in all of the required information and then click on **Create** in the bottom left corner
- If you need to add more than one Co-PI, click on the **+Add New Co-PI** each time to add a new one
- Click **Update** when you are finished to save your additions

After you add a Co-PI, you may receive a warning message that the Co-PI does not have a DMP Editor Account or edit permissions.

- If the Co-PI needs access to the DMP, please request an account and edit permission by **clicking on the red wording following the error message**
- For more information on how to request an account, see RequestingaNewDMPuseraccount

Granting Permission to Designee

- From the DMP Show page, click **Edit** in the bottom left corner
- To give a designee permission to edit your DMP, add their email address to the box next to **Edit Permission Also Granted To**
- If there is more than one person you wish to grant permission to, separate the email addresses with commas, click **Update** to save your additions
- If the person/people you wish to add as a designee(s) does not have an account or edit permissions, you will receive a red warning message
- Click on the **red warning message** next to their email address and follow the instructions to request permission

  See instructions on how to request an account: RequestingaNewDMPuseraccount. The user will then receive a myUSGS email notification within 24 hours with their new account information.

Revoking Permission from Designees

- To revoke permission from a designee, delete their email address from the **Edit Permission also granted to** field
- Click on **Update** to save your changes

How to enable email notification to PI when a Data Steward Comments on DMP

- On the DMP Show page, click **Edit**
- Check the box next to **Notify PI of New Comment**
- Click on **Update** to save changes
- Once an update is complete, an email message is sent to the PI, notifying them that the Data Steward has commented on their DMP

Note: The Co-PIs and designees will not receive notifications when the Data Steward makes comments on the DMP.

How to mark a DMP as Complete

- When the DMP is complete and ready to be reviewed by the Data Steward, go to the DMP edit page and click on **Submit for Review**

The will send an email message to the Data Steward notifying that the DMP is complete and ready for review.

Creating a New DMP

- Log in
- Click on **+New DMP**
- Enter your project name or ID number if you have it
- Click on **Create** on the lower left
- Continue to fill out the information on the DMP show page including any Co-PIs and add any designee(s) you wish to grant edit permission to. If you do not select an Organization, the DMP will be readable by all Organization Managers and Data Stewards.

Adding a New Record

- To add new records, go to your DMP page click on **Add Record**
- Select your record type in the drop-down list for **Section** and then click on **Create**
- Enter the information (You can enter up to 5000 characters within each field in the record entry)

Note: The records form has multiple sections that are shaded in gray which are not required during the proposal stage of the Data Management Plan (DMP). If a project is funded, all fields will then be required.

- Click **Update** to save changes

Uploading a DMP Word Template

If you are using the NCCWSC DMP word template for maintaining the plan and would like to manage the DMP online, you can upload it into the DMP editor tool.

To upload a template, the template must be a .DOCX document.

The NCCWSC template is available at https://nccwsc.usgs.gov/content/data-policies-and-guidance

- Click **DMP list** and select **New DMP**
- Enter the project name
- Select the **Template** for NCCWSC DMP
- Select **Create**
- In the Records section, select **Import records from document**
- Click **Choose File,** then locate the file and click **Import Record**

This will import all of your DMP records and they will be located in the **Records** section of the DMP show page.

Downloading a DMP PDF

- To download a PDF of your DMP click on **Download PDF** in the top right corner, and a PDF file of your DMP will be downloaded to your computer's download folder

As the DMP moves through the different phases of the project life cycle, there will be multiple versions of the DMP available to download.