



MDC FAIR Wizard starting guide User Manual

Prepared by the RDM Team
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1. Introduction to DMPs and FAIR Wizard

1.1. DMPs in a nutshell

A Data Management Plan (DMP) is an important document, often required by funders like Horizon Europe, that outlines how research data will be handled before, during, and after a research project (see Figure 1). Its goal is to promote Open Science practices and ensure compliance with the FAIR principles (Findable, Accessible, Interoperable, and Reusable). The DMP helps guarantee that the data generated is accessible, reusable, and well-documented.

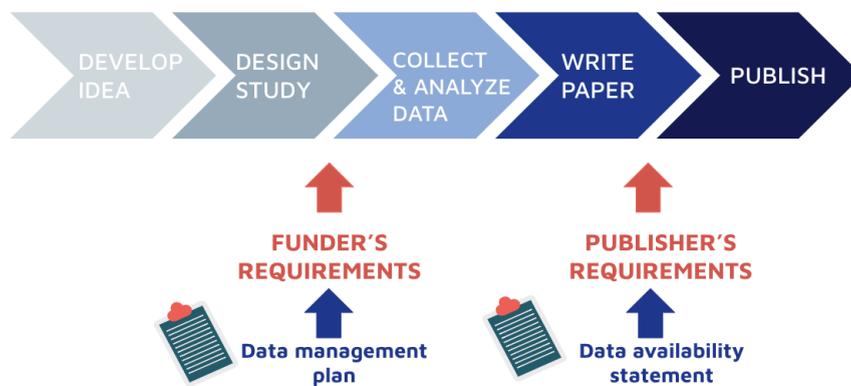


Figure 1. Research lifecycle and timeline when DMP is required

By creating a thorough DMP, researchers can ensure their data will be available and useful to others in the future. This process also saves time, enhances research efficiency, and increases the visibility of the work. Proper data management planning prevents the duplication of efforts and ensures that both the original scientists and others can understand and use the data in the future.

A comprehensive DMP inquires information on: 1. the researcher, research organization, project and funding; 2. data re-use options, 3. data creation and collection choices, 4. processing of the data, 5. data interpretation, 6. preservation and access. In the recent years, different DMP software solutions have been developed: they range from a static textual document difficult to act upon to a new generation of DMPs that enable automated integration of information and updates (machine-actionable DMPs or maDMPs), versioning, notification of changes, archiving and publishing, assessing the FAIRness of data plans, usage statistics, etc.

1.2. FAIR Wizard

Given the range of available Data Management Plan (DMP) software solutions, MDC selected FAIR Wizard as its institutional tool. FAIR Wizard simplifies the creation of DMPs through user-friendly, self-explanatory questionnaires that guide users through each step, highlighting the importance of relevant sections. Only applicable questions are presented based on previous responses, making the process efficient. FAIR Wizard operates on the Data Stewardship Wizard (DSW) engine, but offers additional features such as reverting to previous DMP versions and the ability for admins to create collaborative groups.

While other tools (RDMO, DMPTool, DMPOnline,...) perform well in basic functions like template selection, archiving, publishing, and storage, FAIR Wizard stands out by offering advanced features (Figure 2.). Specifically, it is the only tool that assesses both the FAIRness of data plans and provides user statistics—key for MDC’s commitment to ensuring research data adheres to the FAIR principles, as outlined in its [Policy Framework for Research Data Management](#) (RDM, 2021).

Moreover, FAIR Wizard is designed to support the training of researchers in good data management practices and the FAIR principles.

Comparison matrix					
Tool	DMPTool	DMPOnline Basic/Enh	RDMO	FAIR Wizard	ARGOS
Archiving and Publishing Options	yes	yes	yes	yes	yes
Template Selection	yes	yes	yes	yes	yes
Template/Documents Creation	limited	limited	limited	yes	limited
Templates for German funders	possible	possible	yes	possible	possible
Support for admins	not tested	fast	slow	fast	not tested
Project Phases Acknowledged	no	no	no	yes	no
Making ToDos	no	no	yes	yes	limited
Machine Actionable tool	yes	yes	yes	yes	yes
DMP ID	yes	yes	no	no	no
Version control	no	no	no	yes	yes
Integration with other tools	yes	yes	no	yes	possible
User friendliness/interactivnes	poor	poor	poor	good	good
Assessing FAIRness of data plans	no	no	no	yes	no
Teaching potential	no	no	no	yes	no
Usage statistics	no	no	no	yes	no

Figure 2: Comparison matrix examining DMPTool, DMPOnline, Argos, RDMO and FAIR Wizard

1.3. FAIR Wizard training resources and contact

Option 1:

We have organized and recorded a training session on Data Management Plans (DMPs) and FAIR Wizard as part of our “RDM Monday at 2pm” seminar series. You can find the recording in the **Training and Support** section of the Research Data Management website:

[Research Data Management - Training & Support](#)

The session is titled “RDM Intro: What is a DMP and How to Write It?” presented by Oscar Migueles on June 3, 2024.

Alternatively, you can directly access the training via this link:

[Recording Link](#), Passcode: .C3mceM=

Option 2:

Access training via [AcademyMaker](#). This is in process and will be available in the near future.

Option 3:

The documentation of FAIRWizard is also quite complete

<https://guide.fair-wizard.com/en/production/>

*Tip, you can also access it via the “Admin Center” inside your FAIRWizard account

Contact us:

If you have doubts or comments, please contact the Research Data Management Department:

Oscar.Migueles@mdc-berlin.de
Inga.Patarcic@mdc-berlin.de

Or write us in Mattermost:

<https://mattermost.mdc-berlin.de/mdc-open/channels/research-data-management>

2. How to access FAIR Wizard at the MDC?

Connect to FAIR Wizard local installation by going to the following link:

<https://mdc.fair-wizard.de/>

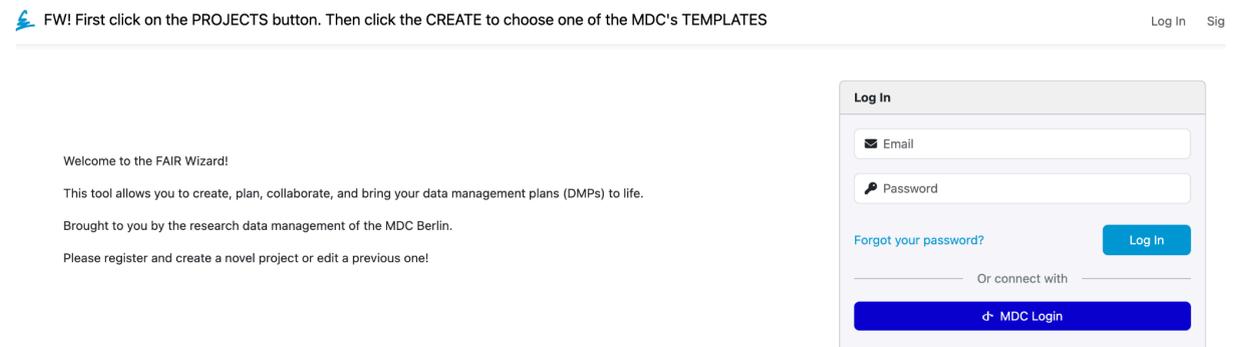


Figure 3: MDC FAIRWizard Login

Click on the **“MDC Login”** button and use your MDC credentials in order to login to FAIRWizard.

3. How to create your first DMP?

After you have logged-in with your MDC credentials you will see the dashboard. Click on the left side of the panel to get to **“Projects”**.

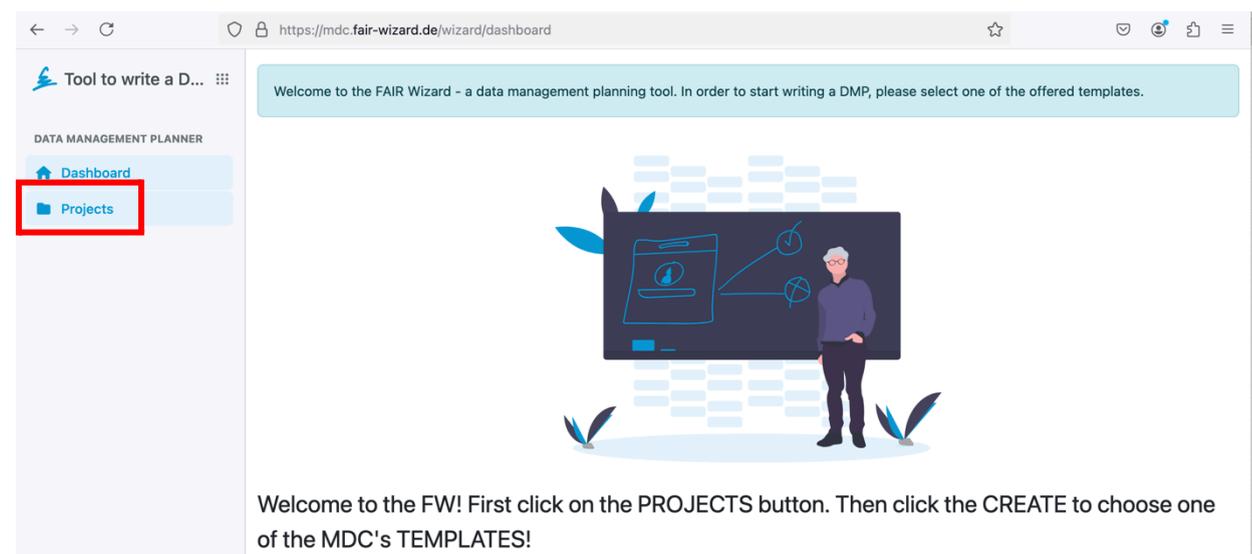


Figure 4: FAIR Wizard dashboard

The projects section will have all the DMPs created by the user in the past. Click on “Create” to generate a new one from scratch.

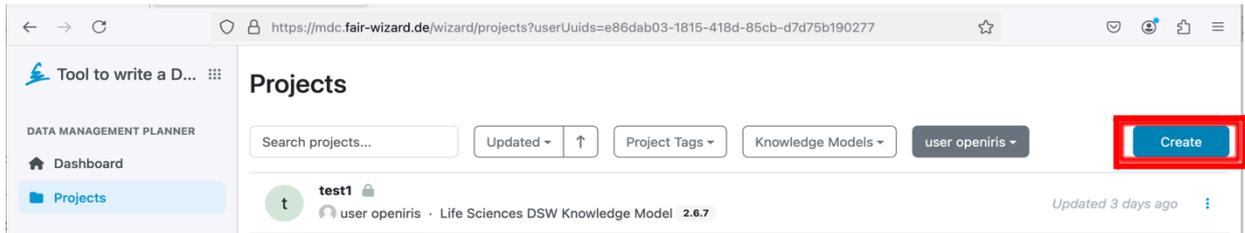


Figure 5: Creating a Project

Name the project and choose the questionnaire (knowledge model) that you would like to utilize for the DMP. There are different knowledge models to revise if you select “From a knowledge model”, and it is possible to also filter out questions unrelated to specific guidelines, like Horizon Europe.

Our recommendation is to choose “From a project template”, which offers the “Horizon Europe template for MDC Template”. It is a Life Sciences DSW questionnaire that keeps only Horizon Europe questions, plus a few questions have already been answered by the RDM team.

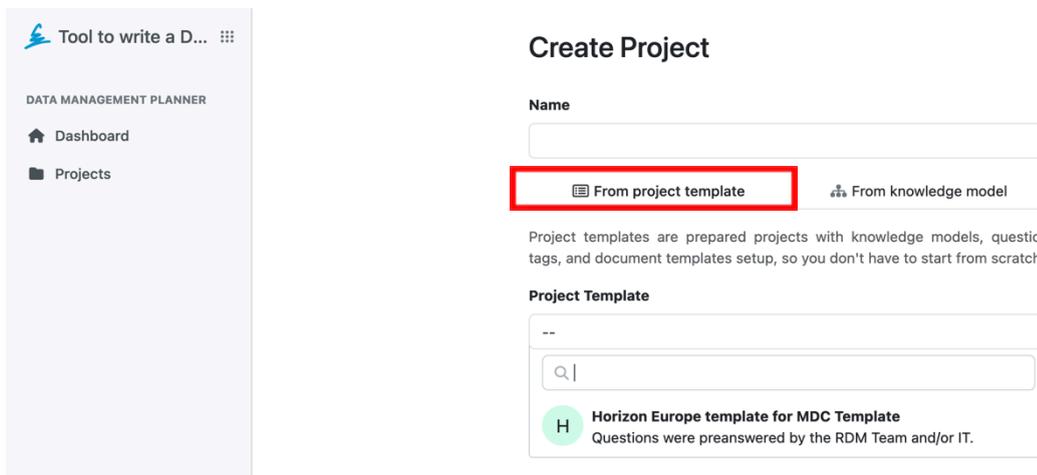


Figure 6: Selecting a knowledge model for the project

Once inside the DMP interface, there are three key areas to focus on:

a. **DMP Phase (upper left, marked as 'a' in the following image):**

This area displays the current stage of the DMP process, which could be one of the following:

- Before Submitting the Proposal
- Before Submitting the DMP
- Before Finishing the Project
- After Finishing the Project

- b. Under the “**Current Phase**,” you’ll also see the available **Chapters** (marked as 'b'), which in this case are seven. Next to each chapter name, you'll find a number indicating how many questions still need to be answered.
 - i. **Green** means the question has been answered.
 - ii. **Grey** indicates the question can be answered later and will become relevant in a future phase of the DMP.
 - iii. **Red** shows that the question needs to be answered in the current phase.

In the example from Fig. 7, the “**Project name**” is an essential question that must be answered in the current phase. This layout makes it easy to track progress and identify outstanding tasks as you move through the DMP preparation process.

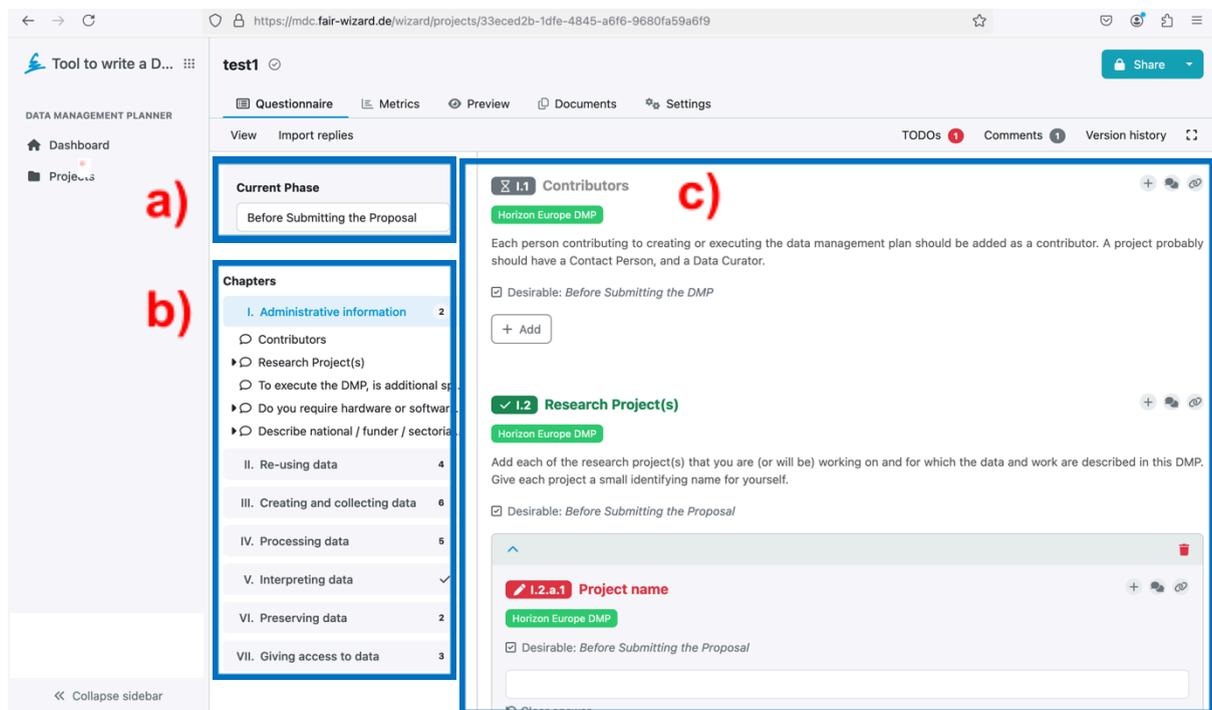


Figure 7: Display panel, a) DMP Phase, b) Chapters, c) Questions

DMP questions:

The DMP includes various types of questions, such as **multiple choice** and **integration questions**, where external resources are automatically consulted to provide answers. For more detailed information on these question types and how they work, please visit the following link:

[Guide to FAIR Wizard - Question Types.](#)

This guide offers a deeper understanding of the different question formats and how they can assist in streamlining your DMP creation process.

Enjoy the process of answering DMP questions and planning your scientific journey!

Embrace this opportunity to organize your research data effectively while setting the foundation for impactful, FAIR-compliant science.

Happy planning!

4. Tips for Efficient DMP Management

1. **Adding TODOs:** On the right side of each question, there is a **plus sign** ⁺ that allows you to mark it as a **"TODO."** When marked, the question is added to a list that appears in the upper-right corner of the questionnaire panel, making it easy to review later.
2. **Adding Comments:** Additionally, there is a **comment icon**  also on the side of the question, that has a similar function, but allows to add a small description of the issue in the respective question.

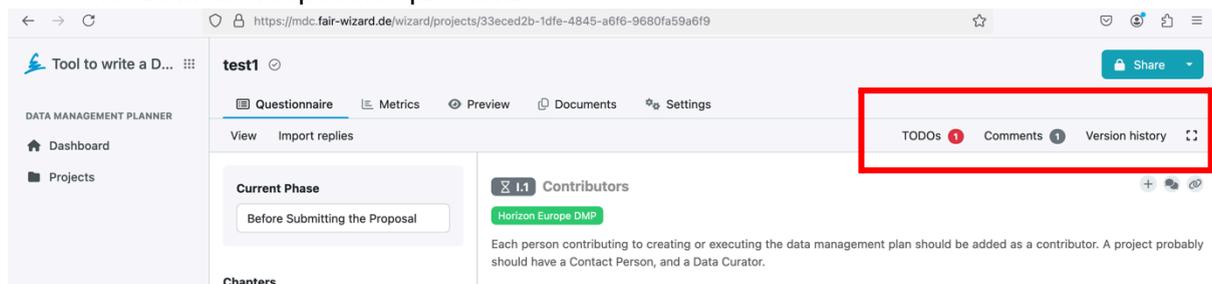


Figure 8: TODOs, Comments and Version history in the display panel

3. **Reviewing Version History:** The **Version History** option is located in the upper-right corner of the questionnaire menu. This feature allows you to review and go back to previous versions of a DMP. You can create a document from any past version by clicking the three-dot menu next to that version. After selecting a specific version, you will be prompted to choose the type of document to export (e.g., Horizon Europe DMP) and the desired format.

Please note: The "Revert to this version" option is irreversible, so use it with caution.

4. **Exporting Documents:** The document will be generated and can always be accessed in the **Documents** section, located in the upper top panel. By clicking on this section, you can view all documents created from previous versions of the DMP.

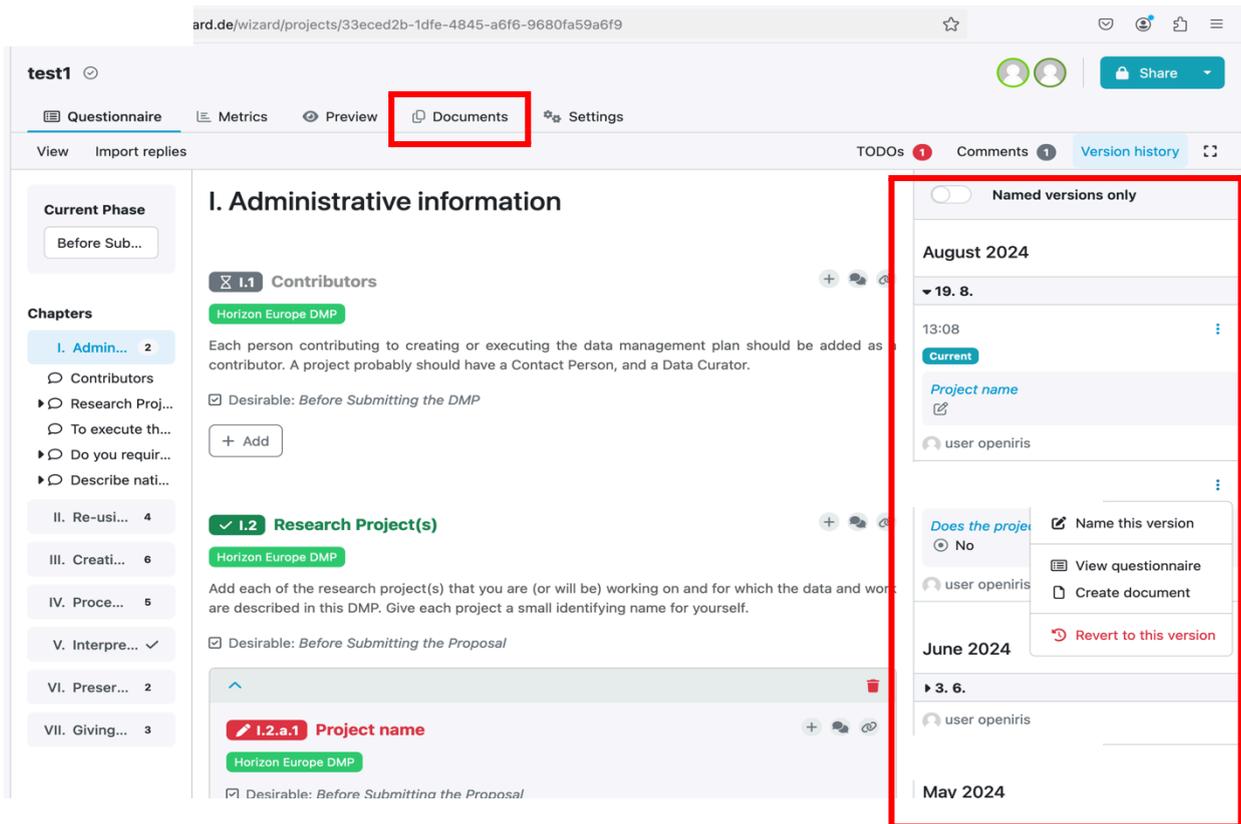


Figure 9: Version history details

5. Additionally, you can generate a document for the current version by selecting the **New Document** option. This provides an easy way to manage and track all versions of your DMP documents.

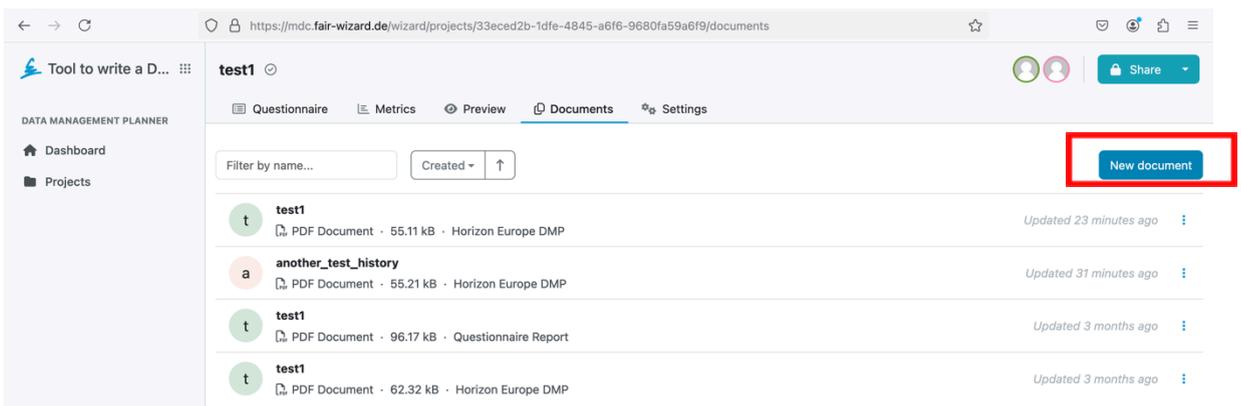


Figure 9: Making a document for the DMP

5. Conclusion

Creating and managing a Data Management Plan (DMP) is an essential part of ensuring your research data aligns with FAIR principles and remains accessible, reusable, and organized throughout your project. By using FAIR Wizard, you have access to powerful tools that streamline the DMP creation process, including adding TODOs, comments, reviewing previous versions, and exporting documents.

We hope this manual has provided you with a clear understanding of how to use FAIR Wizard effectively. Remember, proper data management not only enhances the visibility and impact of your research but also contributes to the broader goals of Open Science.

Have fun exploring the platform and making your research journey smoother! Should you have any questions or need further assistance, don't hesitate to reach out to our RDM team.