





GUIDE FOR CREATING A DATA MANAGEMENT PLAN

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1. Introduction

The Data Management Plan (DMP) is an essential document within the framework of a research project that defines the strategies and procedures that will be carried out to ensure that the data generated is managed efficiently, responsibly and in line with the FAIR+ I principles.

The FAIR principles state that data should be:

- *Findable*
- *Accessible* (accessible)
- *Interoperable* (interoperable)
- *Reusable* (reusable)

To these principles is added the concept of Intelligibility (I), which refers to the need for data to be understandable and interpretable by both humans and automated systems, thus facilitating its reuse and integration.

The purpose of the DMP is to plan, organize and document in a structured way the life cycle of data, from its generation to its preservation and dissemination. It is a living document, which must be prepared at the beginning of the project and updated whenever there are significant changes in data management.


Data management encompasses several key phases and processes:

- Pickup (what)
- Organization (com)
- Storage (where)
- Documentation (com)
- Preservation (as)
- Dissemination and reuse (how and where)

The DMP must include all the data generated in the project, as well as the associated metadata, which must at least be available in open access. This makes it possible to guarantee traceability, facilitate contact with authors, and enable future reuse in accordance with the principles of open science. To assess the degree of compliance with the FAIR principles, the use of the following web tools is recommended:

- [SATIFYD](#)
- [FAIR-Aware](#)
- [F-UJI Automated FAIR Data Assessment Tool](#)
- [CSIC's FAIR Data Assessment Tool](#)

Finally, it should be noted that the maximum openness of data must always be balanced considering ethical, legal and confidentiality requirements, applying the principle of: "As open as possible, as closed as necessary."

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2. Importance of a Data Management Plan

The development of a Data Management Plan is a growing requirement by funding agencies, both nationally and internationally, within the regulatory framework for the promotion of Open Science. These policies promote accessible, understandable and reusable data derived from public research, with the aim of:

- Fostering scientific collaboration
- Improve the transparency of research processes
- Optimize the impact of the results generated
- Promoting scientific progress and social benefit

In many competitive calls, especially those of the ISCIII and European programs such as Horizon Europe, the PGD is considered a mandatory deliverable within the project report. An initial version is often required at the beginning of the project, as well as regular updates or when there are substantial changes in data processing.

The existence of a well-structured PGD not only meets the formal requirements of funding entities but also constitutes a good practice that contributes to the quality, efficiency and sustainability of research.

3. Dissemination, licensing and citation of data

3.1 Data preservation

The data generated during a research project must be deposited in repositories that guarantee its long-term preservation, public accessibility and responsible reuse. This step is essential to comply with the FAIR principles and with the requirements of many funding entities.

Repositories can be thematic, institutional or geographical in nature. To locate the most appropriate repository according to the discipline or type of data, it is recommended to use:

- re3data.org: Global registry of research data repositories.
- [Zenodo](https://zenodo.org): multidisciplinary and open access repository, compatible with the requirements of the European Commission and integrated with OpenAIRE.


The use of repositories that allow the assignment of an **identifier (DOI)** is especially recommended to ensure traceability and correct citation of the data.

3.2 Licenses of use

To allow the re-use of data, it is necessary to clearly define under what conditions it can be used by third parties. This function is carried out by assigning a license of use.

A license is a legal document by which authors determine the rights of use associated with data, such as reproduction, distribution, public communication, or creation of derivative works.

Creative **Commons (CC) licenses** are widely recommended for scientific data, because:

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- They are machine-readable and easy to interpret.
- They do not require formal registration.
- They allow you to combine different conditions such as:
 - o **Attribution (BY):** acknowledgment of authorship.
 - o **Non-commercial (NC):** use restricted to non-commercial areas.
 - o **No Derivative Works (ND) or Share Alike (SA).**

Recommended tools for selecting or creating an appropriate license:

- [Public License Selector](#)
- [Creative Commons Chooser](#)

3.3 Data citation

The data must be cited in a formal and standardized manner, like any other scientific result. The correct citation of the data:

- It guarantees the recognition of authorship.
- It facilitates reuse by other researchers.
- It contributes to the transparency and reproducibility of research.

To facilitate this task, it is recommended:

- Use repositories that assign a **DOI** to data, such as those that work with [DataCite](#).
- Generate bibliographic citations in the format required by the context (APA, MLA, Vancouver, etc.) using tools such as [CrossCite's Monttion Generator](#).


4. Tools for the development of the Data Management Plan

To facilitate the creation and maintenance of a Data Management Plan (DMP), there are various applications and platforms that provide templates. These tools help ensure that the PGD is complete, coherent, and aligned with open science policies and the demands of funding agencies.

Some of the main tools available are:

- [OpenAIRE Argos](#): European platform that offers an intuitive system to create PGD adapted to different calls and disciplines.
- [CORA tool at the University of Lleida](#) and <https://dmp.csuc.cat/>: support for the generation of PGD in accordance with institutional and international requirements.
- [DMP OPIDOR](#): French tool that offers public templates for the drafting of the PGD.
- [DMPTool](#): a widely used North American platform, which includes specific templates for funders such as the NIH, among others.

The use of these tools not only facilitates the initial preparation of the DMP but also allows it to be updated and monitored throughout the duration of the project.

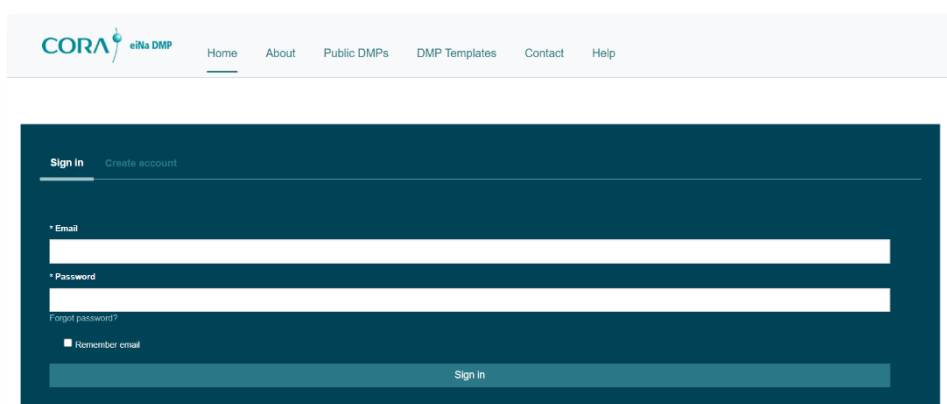
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5. CORA Tool

CORA is a tool for the creation of Data Management Plans (DMPs) that facilitates, in an intuitive and guided way, the drafting, review and sharing of plans, ensuring compliance with the requirements established by funding agencies.

The tool works through templates adapted to different types of projects and disciplines, which simplifies the generation of a coherent and complete DMP. You can access CORA through the following link: <https://dmp.csuc.cat/>.


To register, go to the home page and select the Create **Account** option to create a new user. In the **Organization** section, select University of Lleida. Work is being done so that the option for IRBLleida will also appear soon.

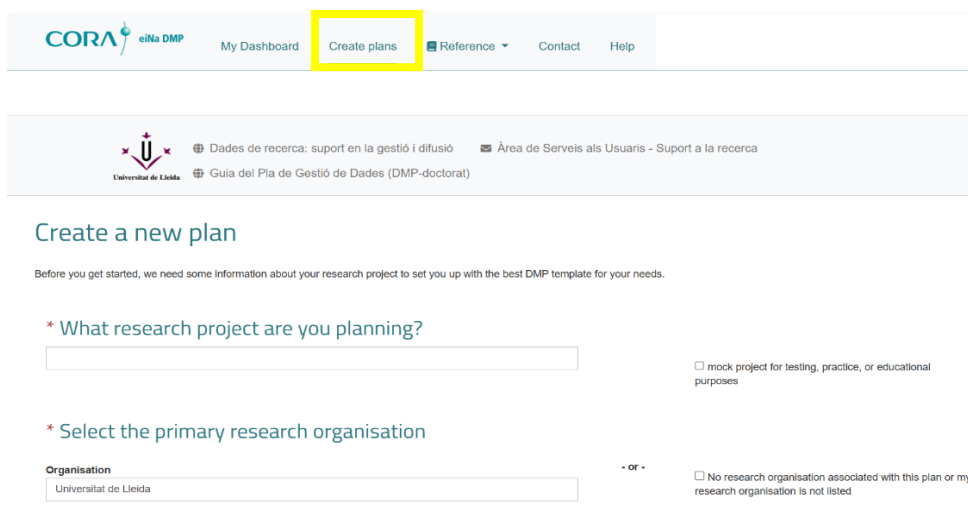


Once the registration is complete, you will automatically access the initial screen called **My Dashboard**, from where you can manage all the data management plans associated with your account.

To start a new Data Management Plan, click on the **Create Plan** option. This action will allow you to start the process of creating your PGD through a guided form adapted to the needs of your project.



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6. PGD creation in CORA

The system will open a guided form with several tabs that will have to be completed. The content of each of the required fields is detailed below:

6.1 What research project are you planning?

The full title of the project for which the data will be generated must be indicated. In the case of a simulated project for teaching, practice or test purposes, it is recommended to check the corresponding checkbox.

6.2 Select the primary research organisation

University of Lleida can be selected as the main institution. Work is currently underway to make IRBLleida available as an option. If it does not appear, check the box indicating that the organization is not on the list.

6.3 Select the primary funding organization


The main funding body of the project must be selected. The available options are:

- State Research Agency: for projects funded by national entities (such as the ISCIII).
- PhD student: in the case of a project associated with a doctoral thesis.
- European Commission: for European projects (except ERC), such as Horizon Europe or EU4Health.
- European Research Council (ERC): for projects funded by the ERC programme.
- Software management plan: if the project involves software development.

In case the project does not have any associated funding, the corresponding box must be checked. By default, the European Commission's "Horizon 2020 FAIR DMP" template will be applied.

6.4 Which DMP template would you like to use?

Depending on the selected funder, different templates will appear. You must choose the most appropriate one. If you have chosen **State Research Agency**, the State Plan option

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will be displayed (in Spanish or English). It is recommended that you select your preferred language.

On the other hand, if you have chosen **European Commission**, HORIZON 2020, FAIR DMP and Horizon Europe will be shown.

6.5 Create Plan

You must click on **Create Plan**. A new screen will load with several tabs to continue filling the plan: *Project details, Plan Overview, Write Plan, Share, Download*.

Project Details	Contributors	Plan overview	Write Plan	Research Outputs	Share	Download
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Depending on the previously selected options, some fields may appear pre-filled, although they can be modified.

6.5.1 Project details

- **Grant Number (if applicable):** The file number or project identifier must be indicated.
- **Project abstract:** It is recommended to write a summary of the project, which allows you to understand the purpose and context of the data generated.
- **ID (if applicable):** A project identification or reference code can be entered.
- **Principal investigator (PI) data:** Basic personal data such as name, email and institution must be included.
- **"Attention" box:** In this tab you can select the funder body again if any changes need to be made.

6.5.2 Contributors


- The main researchers of the project and those responsible for data management must be indicated.

6.5.3 Overview Plan:


- Information tab from which you can consult the general characteristics of the data management plan.

6.5.4 Write Plan

- **Summary of the data:** An overview of the data that will be generated or used during the project should be provided, including:
 - **Data typology:** specify the type of data intended (e.g. texts, images, audio or video recordings, reports, surveys, medical records, biological samples, etc.).
 - **Data format:** indicate the planned formats (e.g. Word, Excel, CSV, R...).
 - **Collection, capture and storage:** describe the procedures and tools used for collection and storage (e.g. telephone interviews, email, specific instruments, specific software, OneDrive...).
 - **Expected data volume:** estimate the approximate amount of data generated (e.g. up to 10 GB).

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- **Metadata:** indicate whether the data will be accompanied by metadata that facilitates its interpretation (e.g. context document).
- **FAIR data:** Data must be Findable, Accessible, Interoperable, and Reusable. It should be considered:
 - Findable data:
 - Indicate where they will be available (e.g. institutional or national repositories).
 - Include contact details if access is not open.
 - Accessible data:
 - Indicate the period of availability (e.g. maximum one year after the end of the project).
 - Set the retention period (e.g. 10 years).
 - Designate the person or institution responsible for the collection and maintenance of the PGD.
 - Determine who will ensure accessibility after the project is completed.
 - Describe possible access restrictions (e.g. sensitive data, confidentiality, intellectual property).
 - Indicate whether any licenses will be used (e.g. Creative Commons: CC-BY, CC-BY-SA...).
 - Interoperable data:
 - Describe the publication format and its compatibility with standard digital tools (e.g. open formats such as Open Office).
 - Reusable data:
 - Explain the conditions for reuse by third parties (e.g. under open licenses such as CC-BY, CC-BY-SA...).
- **Resource allocation**
 - Estimate the costs associated with the development and maintenance of the DMP, as well as the long-term management of the data.
 - Indicate the person or institution responsible for managing the data.
 - Describe the tools and platforms used for creation, collection, and storage (e.g., Excel, OneDrive, etc.).
- **Data security**
 - Assessed applicable policies and standards (e.g. ISO standards, GDPR compliance).
 - Describe measures to ensure security and confidentiality, especially for sensitive data (e.g. anonymisation, restricted access).
 - Define the data backup and recovery system (e.g., OneDrive with automatic backups).

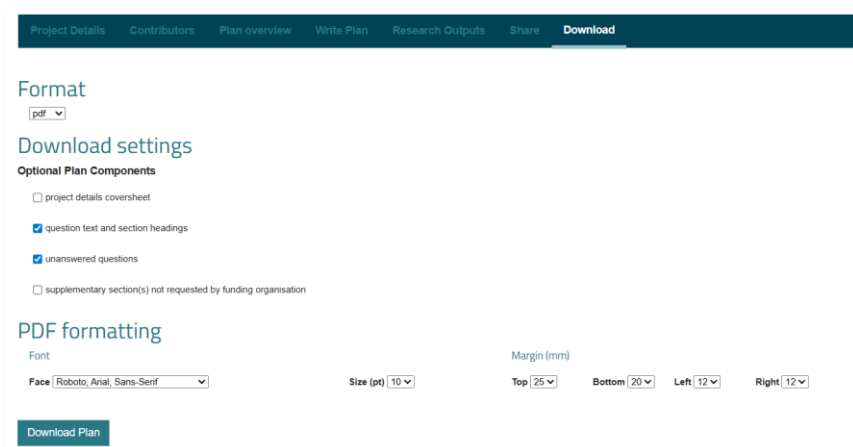
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- Clarify data ownership and intellectual property rights (e.g. definition in consortium agreements or agreements).
- **Ethical aspects**
 - Declare whether personal, sensitive or confidential data will be used.
 - Explain the measures to ensure compliance with current regulations (e.g. Organic Law on Data Protection and Guarantee of Digital Rights, GDPR).
 - Describe the procedures for informing participants and the measures taken to protect their privacy.
- **Other considerations**
 - Include any additional information on costs or resources associated with the DMP not mentioned above.
- **Resources Used**
 - Indicate other resources used for the preparation of the PGD (e.g. guides, digital tools, institutional support, etc.).

7. Obtaining the PGD

Once the plan is complete, you must access the following tabs to download it:

- **"Share"** tab: no information needs to be filled in.
- **"Download"** tab:
 - Check all checkboxes.
 - Select the download format (Word, PDF...). In the case of PDF, you can choose the font and font size.
 - Click **Download Plan** to download the final document.



Project Details Contributors Plan overview Write Plan Research Outputs Share **Download**

Format

pdf

Download settings

Optional Plan Components

☐ project details coversheet

☒ question text and section headings

☒ unanswered questions

☐ supplementary section(s) not requested by funding organisation

PDF formatting

Font

Face: Roboto, Arial, Sans-Serif

Size (pt): 10

Margin (mm)

Top: 25 Bottom: 20 Left: 12 Right: 12

Download Plan