FAIR Wizard

FAIR Wizard is a service for all researchers and other academic staff who are employed or studying at the Charles University.

Using this tool, it is possible to efficiently perform data management and monitor compliance with the FAIR principles , allowing for the **easy creation of a Data Management Plan (DMP)**. To do this, FAIR Wizard uses so-called knowledge models - interactive questionnaires that guide the researcher through the creation of a DMP step by step using questions with predefined answer options, thus **freeing the researcher from having to write the DMP manually**.

Login and user interface overview

Use the **Shibboleth** system to log into the FAIR Wizard website. If you are unable to log in, please contact the FAIR Wizard UK administrator at dmp@cuni.cz .

FAIR Wizard

FAIR Wizard CUNI je nástroj usnadňující tvorbu DMP, zprostředk

V případě dotazů se obraťte na podporu či konzultujte pomocné

FAIR Wizard CUNI is a tool simplifying the DMP creation process University.

If you have any questions, please contact support or access the he

After logging in, you will be automatically directed to the **main page (Dashboard) in the Data Management Planner section**. Here you will find a quick overview of projects you have recently worked on or a list of pending comments that have been assigned to you. There is also a shortcut to create a new project.

UK FAIR Wizard

DATA MANAGEMENT PLANNER

🏠 Dashboard

📁 Projects

📖 Návod / How-to

❓ Podpora / Support

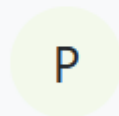👥 Data Stewardi / Data Stewards

🪄 AI Assistant

Researcher UK
Researcher

« Collapse sidebar

Welcome, Researcher!

As a researcher, you create and c plans.

Unresolved Assigned Comm

P **Who is responsible for this part**
Updated less than a minute ago

View all

On the left side of the screen you can find a **side panel containing menu of the section or links to useful materials**. The panel can be collapsed by clicking on the corresponding command at the bottom of the panel. Also at the bottom of the panel is the **user interface**, where you can, for example, log out, view your assigned comments, or change the language of the FAIR Wizard - depending on which section you are currently in. **Please don't use the Edit Profile section at the moment, we are working on an improved version**.

![UK logo] **FAIR Wizard** ⠿

DATA MANAGEMENT PLANNER

🏠 Dashboard

📁 Projects

📖 Návod / How-to

? Podpora / Support

👥 Data Stewardi / Data Stewards

✨ AI Assistant

👤 **Researcher UK**
   Researcher

« Collapse sidebar

Welcome, Re

As a researcher, yo plans.

Unresolved Assi

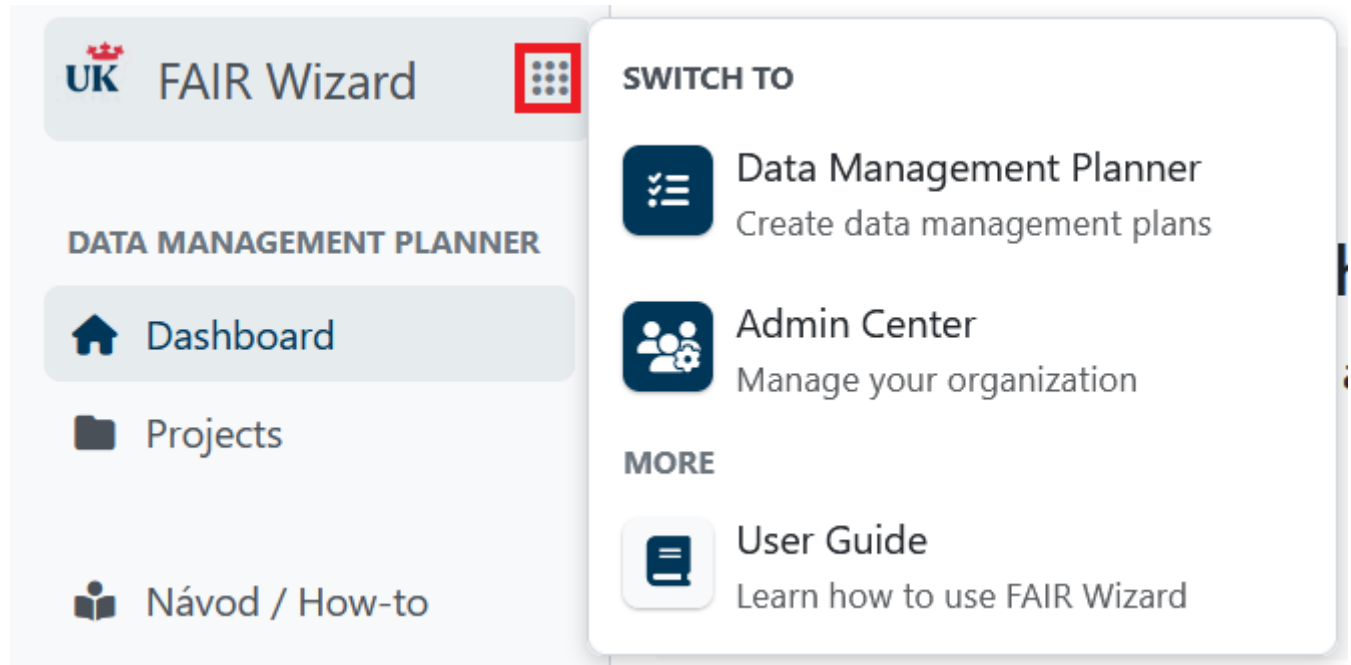👤 Edit profile

☑ Assigned comments

🔤 Change language

↪ Log out

ⓘ About

⚠ Report issue

View all

From the panel you can also access **both sections of FAIR Wizard** you can work with; the aforementioned **Data Management Planner and Admin center** and the **User Guide**, the official manual from the creators of FAIR Wizard.

Projects

The Data Management Planner section contains two "tools" - the aforementioned **Dashboard and a list of your projects**. In this list you will find both projects that you have created yourself, those that you have been invited to join, and projects that have been set to be visible to all FAIR Wizard Charles University users. You can filter the projects by tags, knowledge models or users involved in creating the projects.

Just like in the Dashboard, **you can create a new project here**. You do this by using the **Create button**.

FAIR Wizard

DATA MANAGEMENT PLANNER

- 🏠 Dashboard
- 📁 Projects

- 📖 Návod / How-to
- ? Podpora / Support
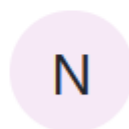- 👤 Data Stewardi / Data Stewards

- ✨ AI Assistant

Lucie Hošková
Researcher

« Collapse sidebar

Projects

Search projects...

Upd

N NA.SCI.2024 🔒
Lucie Hošková · Commo

D DMP 🌐
· Common DSV

V Výzkum abraze dentinu u p
S · Life Sciences DSV

D DMP projektu Rosnička 🔒
Lucie Hošková · Life Sci

Creating a project

A **project** is the name for the **place where the DMP itself is created and where all the settings, comments and resulting documents are located**. For the initial creation of a project, only two things need to be set: the name and the **knowledge model**. The FAIR Wizard offers different models, adapted to different types of research and to the requirements of grant providers. Choose the one that best fits your needs. Some models will then let you directly select questions from specific calls.

Create Project

Name

[   ]

| ▤ From project template | ⛓ From knowledge model |

Knowledge models are templates for questionnaires. You can select question tags now and configure the document template and other settings later.

Knowledge Model

[--   ]

[Cancel]   [Create]

It is also possible to select one of the **preset project templates**. These templates have **specific knowledge models, labels and document templates already set up**. They can also be partially pre-populated, all in order to simplify the researchers' creation of their DMP. For example, they can be templates for specific institute, laboratory or working group projects. **Templates can be created in the FAIR Wizard by users with the Data Steward or Admin roles**. If you need to create a template for your project, group or workplace, please contact support .

Create Project

Name

> [   ]

🗒 From project template   ⛓ From knowledge model

Project templates are prepared projects with knowledge models, question tag
and document templates setup, so you don't have to start from scratch.

Project Template

> --

[Cancel]   [Create]

Migration to another knowledge model
What if you made a mistake and accidentally chose the wrong knowledge model or forgot to check that you want
questions for a specific call? In the project settings, there is a Knowledge Model area where you can perform a so-called
migration - exchanging the model you are using for another one, or to the same one but with more or less questions.

Example project ⊘

☰ Questionnaire	☲ Metrics	⊙ Preview	⧉ Documents	⚙

Knowledge Mod

L	**Life Sciences DSW Kn** Life Sciences customiza

▼ **Filtered by question tags**

Horizon 2020 DMP

Create migration

Original Knowledge Model

L   **Life Sciences DSW Knowledge Model**
     Life Sciences customization of DSW Knowledge Model

Original Version

2.6.7

Original question tags

☑ Horizon 2020 DMP

Cancel

When migrating, beware that **changing models will change the questions themselves**. If you have already filled in some questions, please check if you don´t have to modify your answers. The FAIR Wizard will assist you in this step as well.

Example project

Source KM `dsw:lifesciences:2.6.7`
Target KM `dsw:root:2.6.7`

New Question

Describe national / funder / sectorial / departmental policies and procedures for data management that you will be using.

New Question

Data use restrictions

New Question

Data storage systems and file naming conventions

New Question

Will you be integrating different data sources in order to get more information for each sample or data point?

Resolved changes 0/4

Science Europe

☑ Desirable:

Current Phase

Before Submittin...

○ a. No

○ b. Yes

Chapters

I. Administrati... 1

▶ 💬 Contributors
💬 Research Project(s)
💬 To execute the DMP...
💬 Do you require hard...
💬 Describe national / f...

II. Re-using data 1

III. Creating an... 4

IV. Processing d... 1

V. Interpreting d... ✔

⧗ I.5 D

manager

Science Eur

☑ Desirabl

There are n

Next Chap

Re-using

Questionnaire

Chapters

The questionnaire is composed of thematic sections, so-called chapters. Each chapter contains questions that guide you step by step through the development of the DMP. For example: what data do you plan to collect? How will the data be recorded? Answer in as much detail as possible - it will make your DMP better and easier to use. **FAIR Wizard automatically saves your work** so you don't have to worry about losing data. You can return to individual chapters at any time to update them as your research progresses.

Example project ⊘

🗐 Questionnaire   📊 Metrics   👁 Preview   🗐 Documents   ⚙ Settings

View   Import replies

Current Phase

Before Submitting the Proposal

Chapters

I. Administrative information	1

▸💬 Contributors
💬 Research Project(s)
💬 To execute the DMP, is additional s...
💬 Do you require hardware or softwa...
💬 Describe national / funder / sectori...

II. Re-using data	1
III. Creating and collecting data	4
IV. Processing data	1
V. Interpreting data	✓
VI. Preserving data	1
VII. Giving access to data	3

I. Administrative informatio

✓ **I.1**   **Contributors**

Science Europe DMP

Each person contributing to creating or executing the

☑ Desirable: *Before Submitting the DMP*

⌃

✓ **I.1.a.1**   **Name**

Science Europe DMP

☑ Desirable: *Before Submitting the DMP*

Researcher UK

↺ Clear answer

Answered less than a minute ago by Researcher UK

✓ **I.1.a.2**   **E-mail address**

Science Europe DMP

email@cuni.cz

Phases

Throughout the process of filling in the DMP, you are assisted by so-called phases. The individual **questions are divided according to whether they are appropriate to be completed during the preparation of the scientific project proposal, during the final preparation of the DMP, during the completion of the project or after completion when archiving and sharing of data is addressed.** Selecting the correct phase will result in displaying only the answers that are appropriate to complete during a particular phase. You can then see the number of these for each chapter. They are highlighted in red in the questionnaire itself before completion.

Example project ⊘

| 🗒 Questionnaire | ☰ Metrics | 👁 Preview | 🗐 Documents | ⚙ Settings |

View   Import replies

Current Phase

Before Submitting the Proposal

Chapters

I. Administrative information	1
▶ 💬 Contributors	
💬 Research Project(s)	
💬 To execute the DMP, is additional s..	
💬 Do you require hardware or softwa..	
💬 Describe national / funder / sectori..	
II. Re-using data	1
III. Creating and collecting data	4
IV. Processing data	1
V. Interpreting data	✓
VI. Preserving data	1
VII. Giving access to data	3

I. Administrative informatio

✓ **I.1** **Contributors**

Science Europe DMP

Each person contributing to creating or executing the

☑ Desirable: *Before Submitting the DMP*

⌃

✓ **I.1.a.1** **Name**

Science Europe DMP

☑ Desirable: *Before Submitting the DMP*

Researcher UK

↺ Clear answer

Answered less than a minute ago by Researcher UK

✓ **I.1.a.2** **E-mail address**

Science Europe DMP

email@cuni.cz

Answering the questions

Each question consists of several parts: a unique name; the labels of calls that require the question; an annotation; and during what phase it is recommended to answer the question.

⧗ III.7 How will you be collecting and keeping your metadata?

ELSI   Horizon 2020 DMP   Horizon Europe DMP   Science Europe DMP

For the re-usability of your data by yourself or others at a later stage, a lot of information about the da the data. Such *data about the data* is called **metadata**, and this set of questions are about this metadat

☑ Desirable: *Before Submitting the DMP*

⬈ External links: *RDMkit on documentation and metadata, Metadata Standards Catalogue (RDA), FAI*

○ **a. Explore** ☰

For some questions, there are also **additional explanations**, links to external resources or contacts to experts who can help you complete or understand the question.

✓ III.7 How will you be collecting and keeping your metadata?

ELSI Horizon 2020 DMP Horizon Europe DMP Science Europe DMP

For the re-usability of your data by yourself or others at a later stage, a lot of information about the data – for example with the data. Such *data about the data* is called **metadata**, and this set of questions are about this metadata.

☑ Desirable: *Before Submitting the DMP*

🔗 External links: *RDMkit on documentation and metadata, Metadata Standards Catalogue (RDA), FAIRCookbook on FAIR and*

⦿ **a. Explore** ☰

↺ Clear answer

Answered less than a minute ago by Researcher UK.

There are many kinds of metadata, each serving their own purpose. Some key metadata that you should consider:

- There is metadata that helps identify where the data is coming from (e.g. who created it, title). For this the Dublin Cor
- There are different ways of adding metadata to make the data "discoverable" for other researchers. This requires eith
- There is metadata describing how the data can be re-used, such as license information and, for data about people, th
- There is metadata that makes the data understandable, e.g. linking to the exact processes used to collect them (is a b and units (is a temperature given in Celsius or Fahrenheit?).
- There is metadata describing where the data comes from and what it is useful for. For frequently used data types, the cases you may need to think about this yourself. For each of these kinds of metadata there are specific standards. Th needed to make the data as FAIR as possible.

∧ Collapse

⧗ **III.7.a.1** What standard(s) will you use to specify author/title/keyword information?

Horizon 2020 DMP Horizon Europe DMP Science Europe DMP

There are a few different standards that are often used to give basic information about your dataset. Which ones of thes

☑ Desirable: *Before Submitting the DMP*

○ **a. Explore** ☰

For ease of use and clarity, **you can set what you want to be displayed** next to a question, or what questions you (don't) want to be displayed in the working version of the questionnaire.
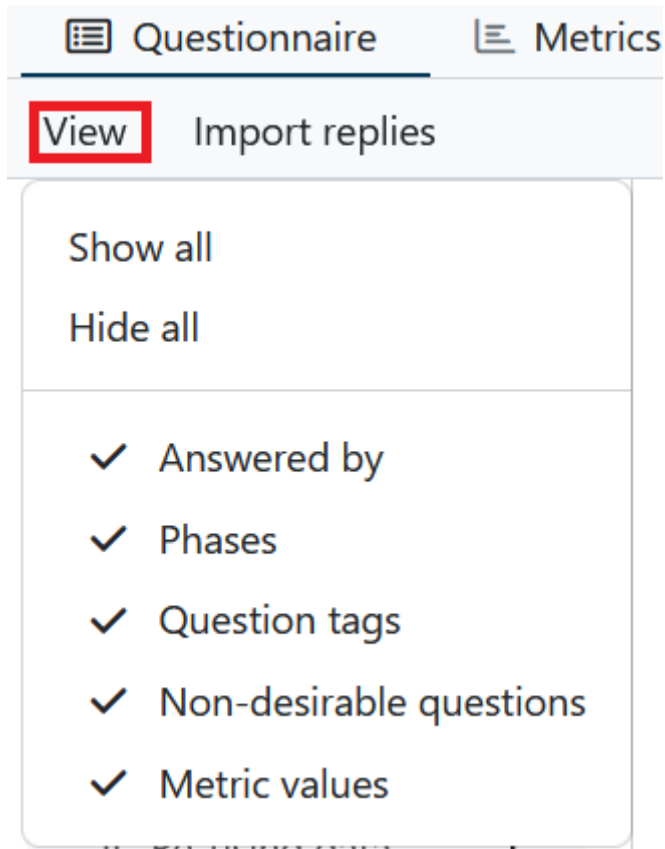
Additional functions while working with the questionnaire

You can use two auxiliary tools while filling in the questionnaire: **the TODO and the comments**.

TODO

Current Phase

Before Su...

Chapters

I. Admi...   1

II. Re-us...   1

III. Creati...   8

IV. Proce...   3

V. Interp...   2

VI. Prese...   4

💬 Specify a list ...

💬 Will you be a...

✏️ **VI.2** **Will you be archiving data (using storage') for long term preservation alrea project?**

ELSI   Horizon 2020 DMP   Horizon Europe DMP   Scienc

Much of the raw data you have will need to be arch often done off-line on tape, not on the disks of the refer to the data publication.

☑ Desirable: *Before Submitting the Proposal*

○ **a. No** ☰

○ **b. Yes** ☰   Good DMP Practice 100%

✏️ **VI.3** **Will you be archiving your data i project finishes?**

Horizon 2020 DMP   Horizon Europe DMP

Using TODO you can **mark any questions that still need to be completed or filled in**. You can find a list of all questions marked this way in the right side bar. When you click on a question´s TODO, the page will automatically redirect you to it.

Comments
For each question, a **user with commenter rights or higher can post a comment** where they can discuss the question with their colleagues. As with TODO, the list of comments is located in the right-hand sidebar. It is also possible to write notes - but these are only available and visible to the owners and editors.

Current Phase

Before Su...

Chapters

I. Admi...   1

II. Re-us...   1

III. Creati...   8

IV. Proce...   3

V. Interp...   2

⏳ **I.5** **Describe national / funder / sectori**

departmental policies and procedures for

management that you will be using.

Horizon Europe DMP   Science Europe DMP

☑ Desirable: *Before Submitting the DMP*

＋ Add

○ **a. No**

○ **b. Yes** ☰

If you want to **address a comment directly to a specific person**, you can do so using the "assign comment thread" function. Once assigned, the comment will appear in the list of assigned comments in the user interface or in the overview on the dashboard.

Version history

FAIR Wizard **keeps a history of all changes made to the questionnaire**. For changes, it shows who made the change and when. Individual versions of the questionnaire can be viewed, named and used to create a ducment..

It is also possible to **replace an older version with the current one** - note that **this step cannot be undone** and any more recent changes will be lost.

FAIR metrics

Some of the questions in the **questionnaire are labelled with colour labels** (red/yellow/green). These labels indicate how much each of the possible answers adheres to the principles of FAIR data .

✓ **III.6.b.4** **How will you design your new data format?**

☑ Desirable: *Before Submitting the Proposal*

◉ **a. There is a closely related more generic and open format that I can spe**

○ **b. I will use a Linked Data format** Interoperability 80%

○ **c. I will use a completely custom data format** Interoperability 0%

↺ Clear answer

Answered less than a minute ago by Researcher UK.

This data is then collected in the **Metrics tab**, where you can find **an overall view of how FAIR your data is**. It's a good idea to keep your practices as consistent with FAIR principles as possible. This will ensure that your data is clear, understandable and reproducible.

Summary Report

Answered (current phase): 2/23
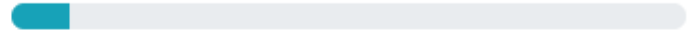
Answered: 22/91
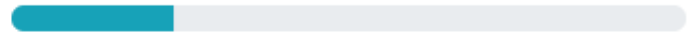
Metrics	Measure	
Findability	1.00	
Interoperability	1.00	
Reusability	0.62	
Good DMP Practice	1.00	

Document

Once you have, at your discretion, sufficiently populated the questionnaire, **you can export it to the final DMP document**. This export is done in the **Document tab**. which also contains an overview of all previously created DMPs. To create a new document, click the **New document button**.

| ▤ Questionnaire | ≡ Metrics | ⊙ Preview | ▢ **Documents** | ⚙⚙ |

Filter by name...   Created ▾   ↑

E **Example project**

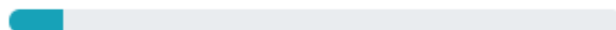📄 PDF Document · 30.62 kB · Horizon 2020 DMP Template

To create a document, you must specify its name and the **document template it will be formatted in.** Different prompts have different templates, but they all work with and include questions from the project questionnaire you provide. You also need to select the format in which the document will be exported.

New Document

Name

Example project

Answered (current phase): 2/23

Answered: 22/91

Document Template

H **Horizon 2020 DMP Template** 1.17.0
Data Management Plan according to the H2020 template

Format

○ 🔧 HTML   ○ 📄 PDF Document

○ 📄 LaTeX Document   ○ 📄 MS Word Document

○ 📄 OpenDocument Text   ○ 📄 Markdown Document

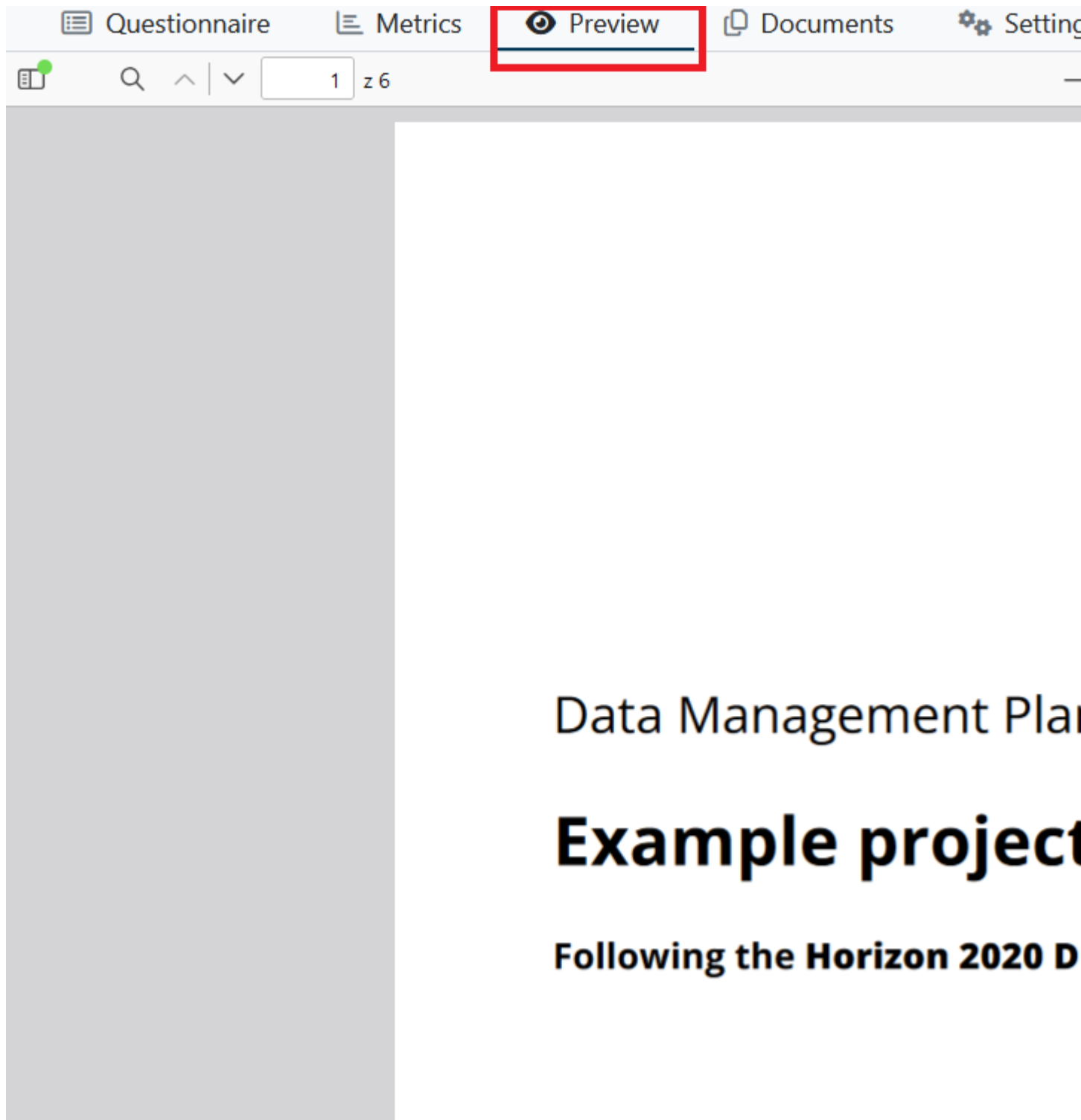Cancel   Create

You can download documents repeatedly, delete them or view the version of the questionnaire from which the document was created.

Example project

📄 PDF Document · 30.62 kB · Horizon 2020 DMP Template

If the call you are creating a DMP for also has a **specific document template, you can set it up**. This is possible under the **Settings tab**. You can also set a default format.

📋 Documents   ⚙️ **Settings**

Default document template

H   **Horizon 2020 DMP Template**   1.17.0
Data Management Plan according to the H2020 template   ✕

Default document format

○ 📄 HTML	◉ 📄 PDF Document
○ 📄 LaTeX Document	○ 📄 MS Word Document
○ 📄 OpenDocument Text	○ 📄 Markdown Document

This automatically fills in the format and template when you create documents. As you complete the questionnaire, you can then see what your final document will look like in the Preview tab.

Questionnaire   Metrics   **Preview**   Documents   Settings

🔍 ∧ | ∨   ☐ 1 z 6   —

Data Management Plan

Example project

Following the Horizon 2020 D

Sharing
More than one person may be involved in the creation of a DMP at the same time. Sharing of the project can be set up via the **Share button**.

Example project ⊘

📋 Questionnaire   📊 Metrics   👁 Preview   📑 Documents   ⚙ Settings

There are **several ways to share a project**. You can share it with **individual FAIR Wizard UK users**, but you can also share it with a **group of users**.

Share Project

User Groups

Add user group

(E) Example group   Owner ⌄ ✕

Users

Add users

(👤) Researcher UK   Owner ⌄ ✕

User groups

User groups are created in the Admin Center section. When you open the section, the **User Groups tab** appears in the left menu. This tab contains both an overview of all the groups you are a member of and publicly visible groups, as well as the **Create button** for creating a user group.

When creating a group, you need to set its name and whether it is a **private group** - only its members can see a private group in the group list.

Create User Group

Name

Group

Description

user group

Private

Cancel   Create

As a last step, you need to set the group members and their roles; Owner or Member. Owner has the right to manage the group, Member is only a member of the group.

User Group Settings

Info

Members

Members of Group

Add member

Researcher UK

Sharing project links and public projects

It is also possible for people without a FAIR Wizard UK account to edit, view or comment on projects. This can be done using the **Public link function** - so all people with a link can interact with the project according to the permissions level set.

It is also possible to set the **project as visible to all FAIR Wizard UK users**. Projects of this type will then be displayed in the project list to all logged in users.

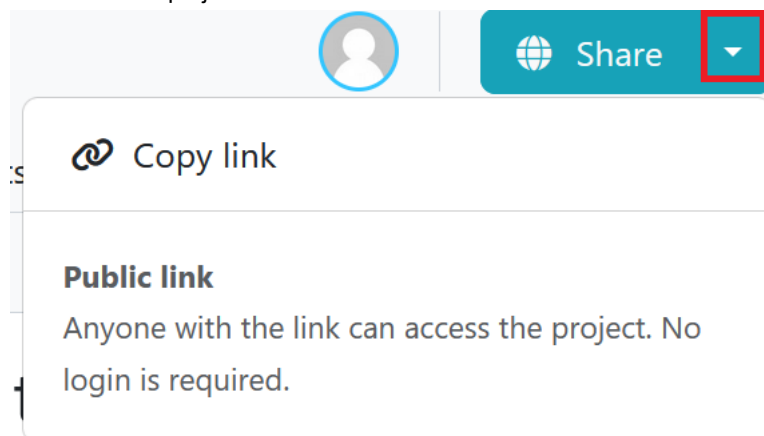**Visible by all other logged-in users**

Other logged-in users can | view ⌄ | the project.

Public link

Anyone with the link can | view ⌄ | the project.

🔗 Copy link   Done

The link to the project can also be accessed via the arrow in the Share button.

👤 🌐 Share ▾

🔗 Copy link

Public link
Anyone with the link can access the project. No login is required.

It is also possible to share only **individual questions** in the questionnaire.

⏳ **I.1** Contributors

Horizon 2020 DMP

Importing projects

It may be that you started creating your DMP in the Data Stewardship Wizard platform, but for some reason you would like to continue with the FAIR Wizard, or vice versa. **It is not a problem to move your completed questions between those services**.

The first thing you need to do is export the filled in questions from your old project. This is done by creating a new document, with the **Questionnaire Report template, and JSON format**.

aire	≣ Metrics	⊙ Preview	🗋 Documents	⚙ Settings

Document Template

> **Q** **Questionnaire Report** 2.13.0
> Exported questions and answers from a questionnaire

Format

⦿ 🗋 JSON Data	○ 〔〕 HTML Document
○ 📄 PDF Document	○ 📄 LaTeX Document
○ 📝 MS Word Document	○ 📄 Markdown Document

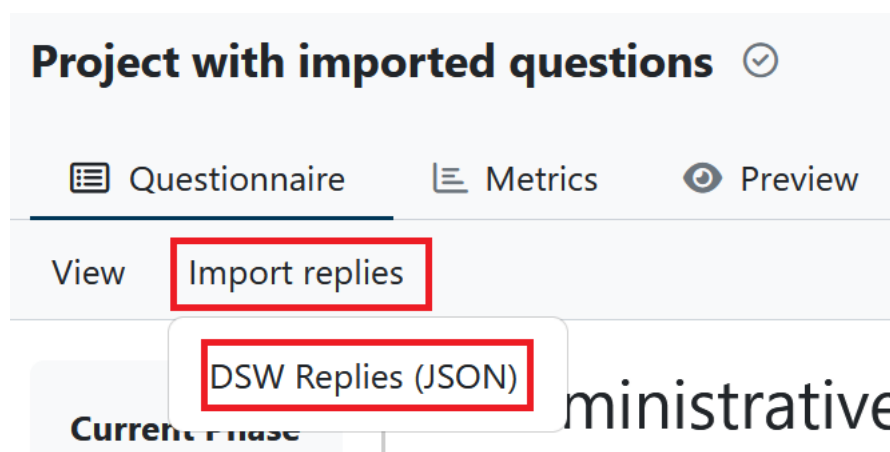Cancel   Create

You then need to download this document.

Example project

📄 JSON Data · 1.03 MB · Questionnaire Report

Create a new project in your target instance. It is essential that its **knowledge model is identical to that of the project you exported your questions from** - if the questions are different or missing altogether, the system will not be able to correctly assign them and the import of the project will not be possible.

Once you have set up the correct knowledge model, you can import your answers into the questionnaire. Select **Import Answers > DSW Answers (JSON)**.
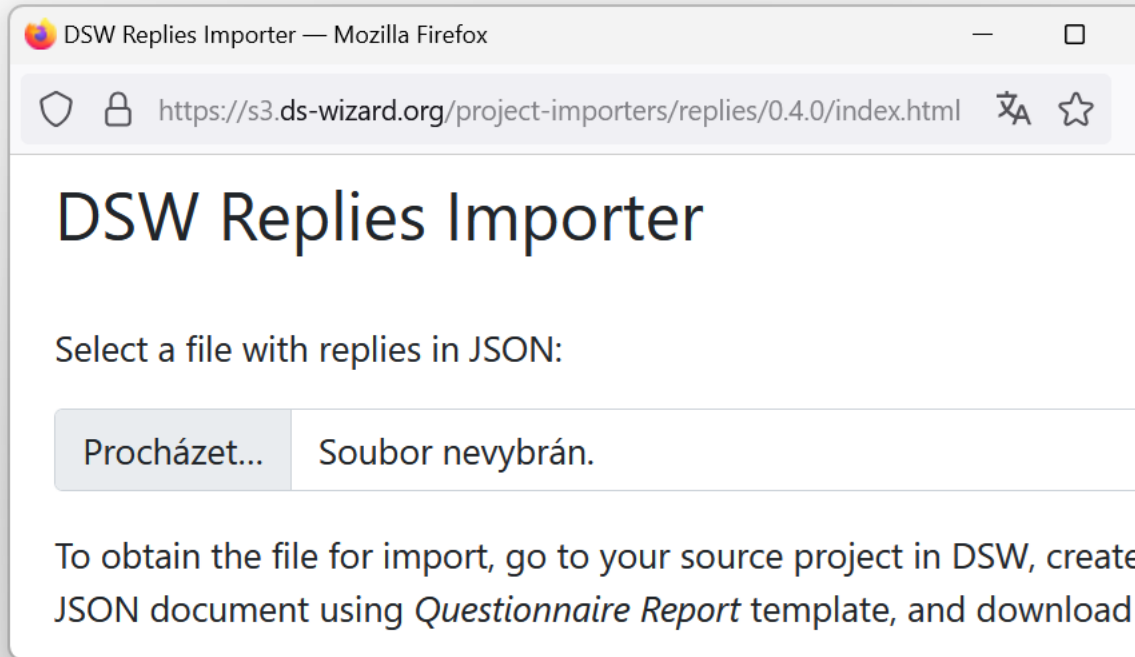
Project with imported questions ⊘

📋 Questionnaire   ⊫ Metrics   👁 Preview

View   Import replies

DSW Replies (JSON)   ministrative

Current Phase

You will be presented with a **pop-up window** where you will be prompted to upload the downloaded JSON document.
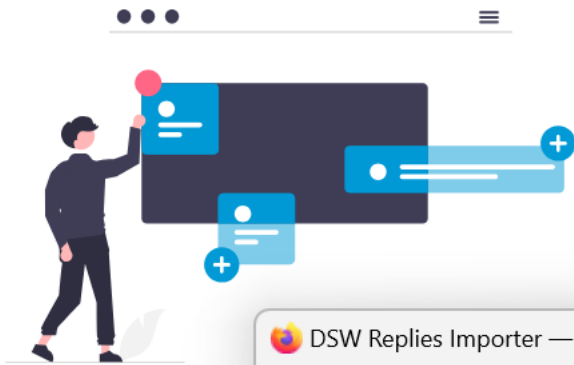
After inserting the JSON file, you will see a preview of the questionnaire with a list of all the responses to be imported.
Click **Import** to finish.

Importing to Project with imported questions

Import status: **4** questionnaire changes will be imported

Questionnaire Changes

Contributors
+ Added item

Name
✏ Researcher UK

E-mail address
✏ researcher@cuni.cz

Do you require hardware or software in ...
⊙ No

Current Phase

Before Submitt...

Chapters

I. Administr...   1

▸💬 Contributors
💬 Research Project(s)
💬 To execute the D...
💬 Do you require ha...
💬 Describe national ...

II. Re-using ...   1

III. Creating a...   7

IV. Processing...   3

V. Interpretin...   2

VI. Preserving...   4

I. Ac

✔ I.1

Horizo

Each p
project

☑ Desi

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✔

Hor

☑ D

Re

Ansv

✔

Your questionnaire now contains the answers you had in the original project. **Don't forget to set up your document template and project sharing options.**

Support

As a researcher, you can use different types of support when creating a DMP in the FAIR Wizard.

The first are the **data stewards at your faculties**. If you need help selecting a template, updating a knowledge model, or help creating or editing user groups, they are ready to help you. You can find a link to the faculty data stewards contact page in each sidebar section.

In addition, this is the **Center for Open Science site** where you can find a complete guide to using the service, including instructional videos. The link to this site is available again from the sidebar, but also before logging in from the main page.

You can also use the official **User Guide** from the developers of the service, which is linked to in the sidebar in the section selection. However, it should be taken into account that this material also contains tutorials for data stewards or instance administrators and therefore navigating through it is not the easiest.

If you have problems with the FAIR Wizard itself or more complex questions that you have not found answers to in other resources, **you can contact the UK FAIR Wizard instance administrator** directly at dmp@cuni.cz or simply by using the Support link in the sidebar.
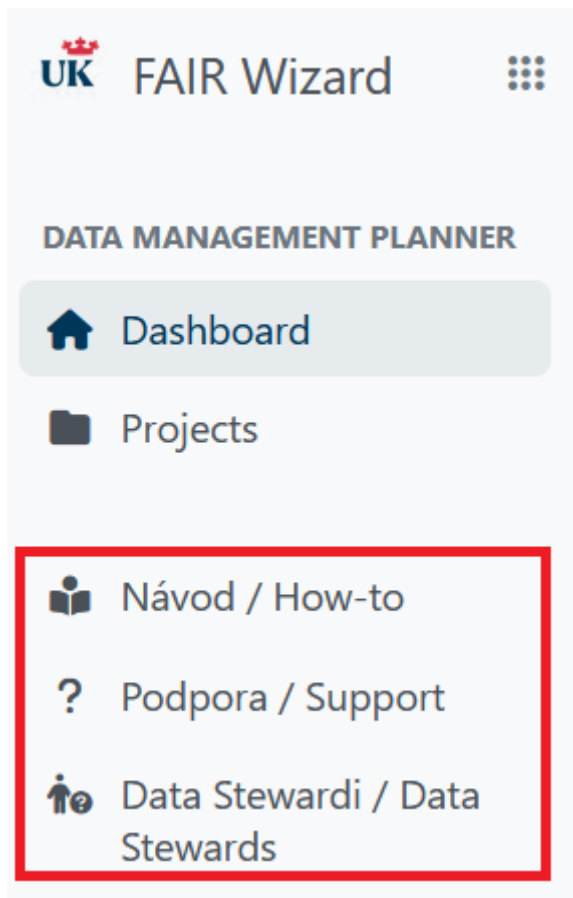
FAQ and troubleshooting issues

In the following section you can access the most frequently asked questions regarding technical errors, functions and features selection.