

Customising *DMPOnline.be* for your institution

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This guide explains how organisation admins can use the admin interface of *DMPonline.be* to customise the tool for their institutions.

Credits

- ▶ S. Jones (2014), **Customising DMPOnline. DCC curation webinar, 10th April 2014**. Available at <https://www.slideshare.net/sjDCC/customising-dmponline-webinar>. Licensed under CC-BY 4.0
- ▶ S. Jones (2014), **Using the DMPOnline admin interface: a guide to customising the tool. Version 1**, Digital Curation Centre. Available at <http://www.dcc.ac.uk/sites/default/files/documents/tools/dmpOnline/DMPonline-admin-interface-guide.pdf>. Licensed under CC-BY 4.0
- ▶ Digital Curation Centre, **Customising DMPOnline for your institution: five steps to follow**. Available at <http://www.dcc.ac.uk/sites/default/files/documents/tools/dmpOnline/DMPonline-customisation-guidelines.pdf>. Licensed under CC-BY 4.0

Covered in this guide

1. Introduction: options for institutional customisation
2. How to customise? Think about content first!
3. Add customisations via the admin area

Prelude

DMPonline.be has 3 'areas'

- ▶ a **user interface** ('orange') to view and create DMPs
- ▶ an **admin area** ('blue') to customise *DMPonline.be* for your institution
- ▶ a **super admin area** ('black'), where e.g. shared (funder) templates are added

The screenshot displays the DMPonline.be user interface. At the top left is the logo 'DMP ONLINE .BE'. At the top right, it says 'Signed in as Myriam Mertens'. Below the logo, there are buttons for 'View plans', 'Create plan', 'About', and 'Help'. The main heading is 'My project (Horizon 2020 FAIR DMP)'. To the right of this heading, a progress bar shows '0/34 questions answered' and 'approx. 25% of available space used'. Below the heading, there are tabs for 'Plan details', 'Horizon 2020 FAIR DMP', 'Share', and 'Export'. The 'Horizon 2020 FAIR DMP' tab is active. Below the tabs, there are two orange sections: 'Version information (4 questions, 0 answered)' and '1. Data summary (6 questions, 0 answered)'. The '1. Data summary' section is expanded, showing a text input area with a rich text editor toolbar (bold, italic, bulleted list, numbered list, link, unlink, table, etc.). To the right of the text input area, there is a comment section titled 'Add comment' with a text input area and a rich text editor toolbar.

1. Introduction: options for institutional customisation

Using the admin area, organisation admins can:

- ▶ add institutional DMP templates
- ▶ add institutional guidance
- ▶ adapt shared templates (e.g. from funders)



Signed in as [Myriam Mertens](#) ▾

[Templates](#)[Guidance](#)[Organisation details](#)[Users](#)

Templates

Own templates

If you wish to add an institutional template for a Data Management Plan, use the 'create template' button. You can create more than one template if desired e.g. one for researchers and one for PhD students.

[Create a template](#)

Your template will be presented to users within your institution when no funder templates apply. If you want to add questions to funder templates use the 'customise template' options below.

Title	Description	Published	Last updated	Actions
PPW DMP	DMP template version 1.0 (2015-02-19) of the Faculty of Psychology ... (continued)	false	07-11-2016	Edit
Generic DMP	Generic DMP template (based on DMPonline_TemplateUGent_GenericDMP_v3.1) ... (continued)	true	22-10-2015	Edit

Institutions can have their own DMP template(s)

- ▶ e.g. for researchers not required to write a DMP for a funder
- ▶ multiple templates per institution possible
 - ▶ e.g. different templates for different groups (faculties, research groups, PhD students. . .)

The screenshot shows a web interface for selecting a DMP template. It is divided into three horizontal sections. The top section is for selecting an organisation, with a dropdown menu currently showing 'Ghent University'. The middle section is for choosing a template, with a search box and a list of options. The bottom section is for selecting other sources of guidance. The interface uses orange text for instructions and a blue highlight for the selected template.

To see institutional questions and/or guidance, select your organisation.

You may leave blank or select a different organisation to your own.

Ghent University

[Not applicable/not listed.](#)

Choose a template*

There are a number of possible templates you could use. Please choose one.

Generic DMP

Generic DMP

Faculty of Psychology & Educational Sciences DMP

Tick to select any other sources of guidance you wish to see.

Main components of an institutional template

- ▶ **RDM questions**, grouped in **sections**
- ▶ **guidance** text to help users answer questions
 - ▶ good way to provide recommendations, links to institutional online resources, support services, contact details for staff or helpdesks etc.
- ▶ **answer box**, with various formats possible (text field, dropdown, radio buttons, . . .)
- ▶ **example/suggested answers** can also be provided
 - ▶ useful to show the kind of response and/or level of detail required
- ▶ a template can have multiple **phases**
 - ▶ e.g. initial DMP created in early stage, full DMP written later on in project. . .
 - ▶ reflects the idea of a DMP as a 'living' document

Rural Economy & Land Use project (Generic DMP)

0/15 questions answered

approx. 55% of available space used

Phase

Plan details

Generic DMP

Share

Export

Administrative Data (2 questions, 0 answered)

Data Collection (2 questions, 0 answered)

Sections

What data will you collect or create?

Question

B

I

☰

☰

☰

🔗

📄

Answer box (text area)

Guidance

Guidance

Add comment

Guidance

Questions to consider:

- What types, formats and volume of data?
- Are your chosen file formats best suited for data collection/creation and analysis, notably in your field of research?
- Are your chosen file formats suitable for general and long-term usability?
- Do you plan to reuse existing or third-party datasets?

UGent guidance on Data Type

Save

Not answered yet

Types of guidance

question-specific guidance	themed guidance from organisation	themed guidance from other sources
pertains to specific question in specific template	applies accross templates	applies accross templates (but can be made optional)
<i>automatically opened next to question</i>	<i>open by clicking '+' sign</i>	<i>open by clicking '+' sign</i>
usually pertains to same entity as template	pertains to institution as a whole	pertains to subset within institution
<i>appears as "Guidance"</i>	<i>e.g. "UGent guidance on Storage and Backup"</i>	<i>e.g. "Humanities Faculty guidance on Storage and Backup"</i>

Question-specific vs. themed guidance

Question-specific guidance

Guidance

Questions to consider:

- Where will you store the data during research?
- Do you have sufficient storage, or will you have to take additional measures?
- What is your backup strategy?
- How will the data be recovered after a loss?

Guidance for question 8 in UGent 'Generic DMP' template only

Themed guidance

UGent guidance on Storage and Backup

Robust storage and backup procedures are essential to prevent data loss. Consider what locations, storage media, number of copies, frequency, verification procedures, manual or automatic systems, integrity checks etc. your storage and backup strategy will involve. Keep in mind that it is risky to only store active data on a computer hard drive or external storage device.

Ghent University offers its staff personal and shared storage on a central storage infrastructure, which ensures secure storage and regular backups of files. More info on the UGent central disk space.

Guidance is shown whenever UGent researchers are asked about storage & backup

Fixed list of guidance themes in *DMPonline.be*

Confidentiality | Data Capture Methods | **Data Description** |
Data Format | **Data Quality** | Data Repository | **Data Security** |
Data Selection | **Data Type** | Data Volumes | **Discovery by Users**
| Documentation | **Ethical Issues** | Ethics and Confidentiality |
Existing Data | Expected Reuse | **ID** | IPR Ownership and
Licencing | **Managed Access Procedures** | Metadata | **Method
for Data Sharing** | Period of Preservation | **PI/Researcher** |
Preservation Plan | **Project Description** | Project Name | **Related
Policies** | Relationship to Existing Data | **Resourcing** |
Responsibilities | **Restrictions on Sharing** | Storage and Backup |
Timeframe for Data Sharing |

- More info: S. Jones (2014), *Using the DMPonline admin interface: a guide to customising the tool*. Appendix 1

Adapting funder templates

- ▶ add questions
 - ▶ your institution may want extra information that funders don't ask for
 - ▶ researchers will probably not want to write a DMP for their funder AND their institution
- ▶ add suggested/example answers
 - ▶ to help researchers answer funder questions

2. How to customise? Think about content first!

Steps to follow

1. What are your institution's RDM requirements? Do you have an RDM policy?
2. If you require DMPs:
 - ▶ draft institutional template
 - ▶ review existing funder templates
3. Draft your guidance & example/suggested answers
 - ▶ More info: DCC, *Customising DMPonline for your institution: five steps to follow*

Typical topics covered in a DMP template

1. data collection
2. data documentation & metadata
3. ethical & legal issues
4. data storage & backup during research
5. data preservation after research
6. data sharing
7. responsibilities & resources

Need inspiration?

Have a look at existing templates, e.g.

- ▶ DCC's *Checklist for a Data Management Plan*
- ▶ *Research Data Wiki - Datamanagementplanen*

3. Add customisations via the admin area

But always try them out in the preview environment first!

- ▶ in <https://preview.dmponline.be> you can experiment without bothering end users
- ▶ when ready, enter your customisations in the production site <https://dmponline.be>



[Signed in as Myriam Mertens ▾](#)

Templates

Guidance

Organisation details

Users

Templates

Own templates

If you wish to add an institutional template for a Data Management Plan, use the 'create template' button. You can create more than one template if desired e.g. one for researchers and one for PhD students.

Create a template

Your template will be presented to users within your institution when no funder templates apply. If you want to add questions to funder templates use the 'customise template' options below.

Title	Description	Published	Last updated	Actions
PPW DMP	DMP template version 1.0 (2015-02-19) of the Faculty of Psychology ... (continued)	false	07-11-2016	Edit
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Accessing the admin area

- ▶ sign into *preview* or *production site* (depending on the situation)
- ▶ right-click on “Signed in as [your name]” and select “Admin area” from the menu
 - ▶ only users with organisation admin rights can access admin area!

The screenshot shows the DMP ONLINE .BE interface. In the top right corner, it says "Signed in as Myriam Mertens". A dropdown menu is open, showing options: "Edit profile", "Super admin area", "Admin area" (which is circled in red), and "Sign out". Below the login area, there are three buttons: "Templates", "Guidance", and "Organisation". The main section is titled "Organisation details" and contains the text "These are the basic details for your organisation." followed by a table.

Name	Ghent University
Abbreviation	UGent
Description	
Website	
Organisation type	Institution

The admin area has 4 main menu items

1. Templates

- ▶ to create institutional templates or adapt funder templates

2. Guidance

- ▶ to add themed guidance for (a subset within) your institution

3. Organisation details

- ▶ to edit basic info about your institution

4. Users

- ▶ to see who is using *DMPonline.be* in your institution
- ▶ to see how many DMPs they have created

Editing organisation details

- ▶ select the “Organisation details” menu
- ▶ click “Edit” to start adding/modifying information for your institution

DMP ONLINE .BE

Signed in as [Myriam Mertens](#)

[Templates](#) [Guidance](#) [Organisation details](#) [Users](#)

Organisation details

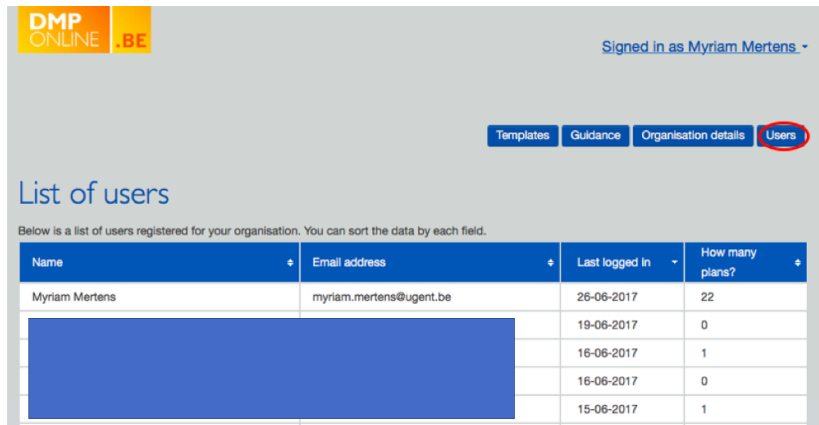
These are the basic details for your organisation.

Name	Ghent University
Abbreviation	UGent
Description	
Website	www.ugent.be
Organisation type	Institution
Last updated	27-06-2017

[Edit](#)

Viewing users

- ▶ select “Users” to view *DMPonline.be* users in your institution



DMP ONLINE .BE

Signed in as [Myriam Mertens](#)

[Templates](#) [Guidance](#) [Organisation details](#) [Users](#)

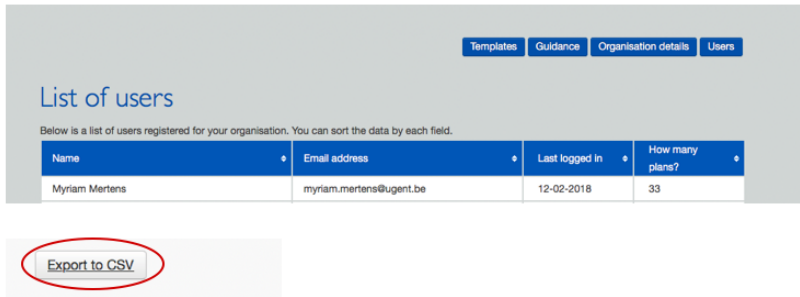
List of users

Below is a list of users registered for your organisation. You can sort the data by each field.

Name	Email address	Last logged in	How many plans?
Myriam Mertens	myriam.mertens@ugent.be	26-06-2017	22
		19-06-2017	0
		16-06-2017	1
		16-06-2017	0
		15-06-2017	1

Exporting user list

- click “Eport to CSV” below the list of users to export it in .csv format



The screenshot shows a web interface for managing users. At the top right, there are four blue buttons: 'Templates', 'Guidance', 'Organisation details', and 'Users'. Below these is the heading 'List of users'. A text line states: 'Below is a list of users registered for your organisation. You can sort the data by each field.' Below this is a table with four columns: 'Name', 'Email address', 'Last logged in', and 'How many plans?'. The table contains one row for 'Myriam Mertens' with email 'myriam.mertens@ugent.be', last logged in '12-02-2018', and 33 plans. Below the table, the 'Export to CSV' button is highlighted with a red oval.

Templates Guidance Organisation details Users

List of users

Below is a list of users registered for your organisation. You can sort the data by each field.

Name	Email address	Last logged in	How many plans?
Myriam Mertens	myriam.mertens@ugent.be	12-02-2018	33

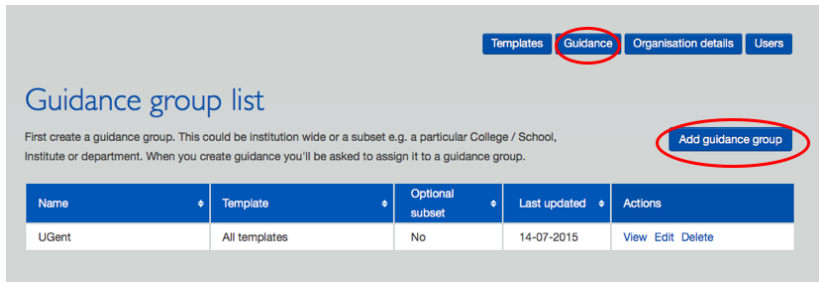
Export to CSV

Creating themed guidance

- ▶ best done before adding institutional templates
- ▶ guidance can then be drawn into your templates as you select associated themes
- ▶ steps to follow:
 1. create a guidance group (to tell end users where the guidance comes from)
 2. add your guidance texts

Creating themed guidance - create a guidance group (1)

- ▶ group can be your institution as a whole, or a subset within it
- ▶ go to the “Guidance” menu
- ▶ under “Guidance group list”, click “Add guidance group”



Templates **Guidance** Organisation details Users

Guidance group list

First create a guidance group. This could be institution wide or a subset e.g. a particular College / School, Institute or department. When you create guidance you'll be asked to assign it to a guidance group.

Add guidance group

Name	Template	Optional subset	Last updated	Actions
UGent	All templates	No	14-07-2015	View Edit Delete

Creating themed guidance - create a guidance group (2)

- ▶ add a name for your guidance group (will be visible to end users)
- ▶ select which templates you want the guidance to display on (usually “all”)
- ▶ if guidance is only meant for a subset of users, check the “optional subset” box (end users can opt in to view this guidance via the “create plan” wizard)

The screenshot shows a web interface for creating a guidance group. At the top, there are four tabs: 'Templates', 'Guidance', 'Organisation details', and 'Users'. The 'Guidance' tab is active. Below the tabs, the title 'Guidance group' is displayed. The form contains three sections: 'Name Label' with a text input field containing 'UGent'; 'Template' with a dropdown menu showing 'All templates', 'AHRC Template', 'Faculty of Psychology & Education', and 'Generic DMP'; and 'Optional subset' with a checkbox labeled 'e.g. School/ Department'. A tooltip box is open over the form, containing the text: 'Add an appropriate name for your guidance group e.g. Glasgow guidance. This name will be used to tell the end user where the guidance has come from e.g. 'Glasgow Guidance on Metadata''. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button circled in red. There are also three question mark icons next to the input fields.

Templates Guidance Organisation details Users

Guidance group

Name Label

Template

All templates
AHRC Template
Faculty of Psychology & Education
Generic DMP

Optional subset ☐ e.g. School/ Department

Save Cancel

Add an appropriate name for your guidance group e.g. Glasgow guidance. This name will be used to tell the end user where the guidance has come from e.g. 'Glasgow Guidance on Metadata'

How end users select guidance to display

- ▶ institution-wide guidance: presented to end users when they select institution in the “create plan” wizard
- ▶ optional guidance: presented when end users select it from “other source of guidance” in the “create plan” wizard

Create a new plan

Please select from the following drop-downs so we can determine what questions and guidance should be displayed in your plan.

If applying for funding, select your research funder.

Otherwise leave blank.

Name of funder, if applicable.

--Select your funder--

[Not applicable/not listed.](#)

Funder name

To see institutional questions and/or guidance, select your organisation.

You may leave blank or select a different organisation to your own.

Ghent University

[Not applicable/not listed.](#)

Choose a template*

There are a number of possible templates you could use. Please choose one.

Generic DMP

Tick to select any other sources of guidance you wish to see.

☐ DCC

Creating themed guidance - add guidance texts (1)

- ▶ scroll down to “Guidance list” in the “Guidance” menu
- ▶ click “Add guidance”

Guidance list

You can write pieces of guidance to be displayed by theme (e.g. generic guidance on storage and backup that should present across the board) or you can write guidance for specific questions. Writing generic guidance by theme saves you time and effort as your advice will be automatically displayed across all templates rather than having to write guidance to accompany each.

You will usually want your guidance to display on all templates, however there may be cases where you only want it to show for specific funders e.g. if you have specific instructions for applicants to BBSRC for example. This can be set too if needed.

Add guidance

Text	Theme Label	Question	Guidance group	Last updated	Actions
<p>Choosing non-proprietary or open/standard, and lossless file formats helps ensure future accessibility and usability of your digital data.</p> <p>See ANDS guidance on file formats. More information about specific formats via CEST (in Dutch, under 'Collecties digitaliseren').</p>	Data Format	-	UGent	22-10-2015	View Edit Delete

Creating themed guidance - add guidance texts (2)

- ▶ in “New guidance”, enter your guidance text
- ▶ choose to have guidance applied “by themes” (default), and select related theme(s)
- ▶ select which guidance group the guidance relates to

The screenshot shows the 'New guidance' form with several annotations:

- A red circle highlights the 'by themes' option in the 'Should this guidance apply:' dropdown menu.
- A red arrow points to the 'Data Capture Methods' option in the list of themes below the dropdown.
- A red circle highlights the 'Save' button at the bottom right of the form.

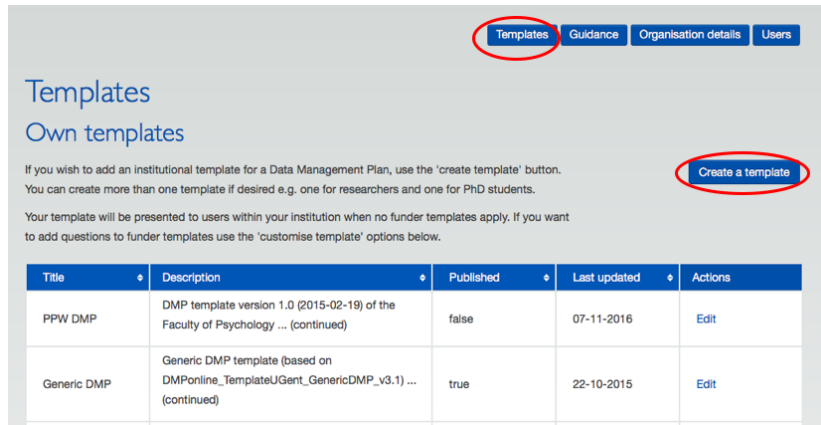
The form includes a text editor for entering guidance text, a dropdown for selecting the application method (currently 'by themes'), a list of themes (None, Confidentiality, Data Capture Methods, Data Description), a dropdown for selecting the guidance group (currently 'UGent'), and a 'View all guidance' button in the top right corner.

Adding an institutional template

- ▶ institutional templates will be displayed to users in your organisation when no funder template applies
- ▶ templates have one or more phases
- ▶ templates consist of any number of questions, grouped into sections

Adding an institutional template - create template (1)

- ▶ go to the “Templates” menu
- ▶ under “Own templates”, click “Create a template”



Templates

Own templates

If you wish to add an institutional template for a Data Management Plan, use the 'create template' button. You can create more than one template if desired e.g. one for researchers and one for PhD students.

Your template will be presented to users within your institution when no funder templates apply. If you want to add questions to funder templates use the 'customise template' options below.

Title	Description	Published	Last updated	Actions
PPW DMP	DMP template version 1.0 (2015-02-19) of the Faculty of Psychology ... (continued)	false	07-11-2016	Edit
Generic DMP	Generic DMP template (based on DMPonline_TemplateUGent_GenericDMP_v3.1) ... (continued)	true	22-10-2015	Edit

Adding an institutional template - create template (2)

- ▶ in “New template”, enter a template title and description
- ▶ template title will be visible to end users (in the “create plan” wizard)
- ▶ add a description for yourself, to distinguish between templates (both title & description will appear in the “Own templates” list in the admin area)

New template






[View all templates](#)

To create a new template, first enter a title and description. Once you have saved this you will be presented with options to add one or more phases.

Title

UGent DMP

Description

B *I*     

?

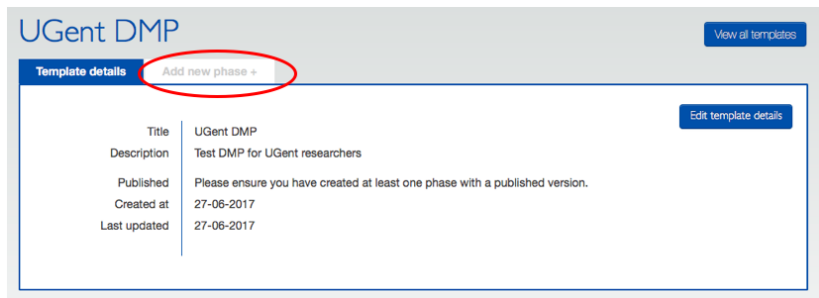
Enter a description that helps you to differentiate between templates e.g. if you have ones for different audiences.

Save

Cancel

Adding an institutional template - add new phase (1)

- ▶ after creating a new template, click “Edit template details” to change title & description if needed
- ▶ click the “Add new phase” tab to get started



The screenshot displays the UGent DMP interface. At the top left is the logo 'UGent DMP'. In the top right corner is a blue button labeled 'View all templates'. Below the logo, there is a navigation bar with two tabs: 'Template details' (which is active and highlighted in blue) and 'Add new phase +' (which is circled in red). To the right of the 'Add new phase +' tab is a blue button labeled 'Edit template details'. The main content area below the tabs contains a table with the following information:

Title	UGent DMP
Description	Test DMP for UGent researchers
Published	Please ensure you have created at least one phase with a published version.
Created at	27-06-2017
Last updated	27-06-2017

Adding an institutional template - add new phase (2)

- ▶ in “Phase details”, enter a phase title (choose something generic if you only want one phase)
- ▶ if applicable, choose “Order of display” to order multiple phases
- ▶ add a basic phase description
- ▶ the phase title & description will be visible to end users

UGent DMP [View all templates](#)

Template details **Add new phase +**

Phase details

When you create a new phase for your template, a version will automatically be created. Once you complete the form below you will be provided with options to create sections and questions.

Title

Order of display

Description

B *I*

This is a template for UGent researchers not writing a DMP for a particular funder.

Enter a title for the phase e.g. Initial DMP, full DMP... This is what users will see in the tabs when completing a plan. If you only have one phase, call it something generic e.g. Glasgow DMP

Enter a basic description. This will be presented to users above the summary of the sections and questions they will be asked to answer.

Save **Cancel**

Adding an institutional template - create version

- ▶ when saving the “Phase details”, a first version is automatically created

UGent DMP

[View all templates](#)

[Template details](#) **UGent DMP** [Add new phase +](#)

Phase details

[Edit phase details](#)

Here you set the title that users will see. If you intend to have multiple phases for you DMP, this should be clear in the title and description.

Title	UGent DMP
Order of display	1
Description	This is a template for UGent researchers not writing a DMP for a particular funder.

Versions

A first version is created automatically. If you want to make major changes to published versions later (e.g. add section or questions) please create a new version. If you only want to fix typos or make small changes that do not alter meanings, edit the current version.

Title	Published	Created at	Last updated	Actions
UGent DMP v.1	false	27-06-2017	27-06-2017	View Edit Preview

Version details

Adding an institutional template - add section (1)

- ▶ if needed, edit title and description under “Version details”
- ▶ to start adding sections & questions, click “Add section”

Versions

A first version is created automatically. If you want to make major changes to published versions later (e.g. add section or questions) please create a new version. If you only want to fix typos or make small changes that do not alter meanings, edit the current version.

Title	Published	Created at	Last updated	Actions
UGent DMP v.1	false	27-06-2017	27-06-2017	View Edit Preview

Version details

Title

UGent DMP v.1

Description

B *I*

Published

☐

Save

Cancel

Add section

Adding an institutional template - add section (2)

- ▶ enter a title for your section
- ▶ choose “Order of display” to order the different sections
- ▶ if desired, add a basic description for the section (visible to end users)

The screenshot shows a web interface titled "Data Collection". On the left, there are two sections: "Order of display" with a dropdown menu showing "1" and a plus-minus icon, and "Description" with a rich text editor. The rich text editor has a toolbar with buttons for bold (B), italic (I), bulleted list, numbered list, link, and a table icon. A tooltip with a question mark icon points to the description field, containing the text: "Enter a basic description. This could be a summary of what is covered in the section or instructions on how to answer. This text will be displayed in the coloured banner once a section is opened to edit." At the bottom right, there are two buttons: "Save" (highlighted with a red circle) and "Cancel".

Adding an institutional template - add question (1)

- ▶ once you have saved a new section, you can click “Add question”
- ▶ you will be then presented with options to add individual questions

The screenshot displays a web interface titled "Data Collection" with a blue header bar. Below the header, there is a section for editing a question. On the left, under "Order of display", there is a dropdown menu showing "1". Below that, under "Description", there is a rich text editor with a toolbar containing icons for bold (B), italic (I), bulleted list, numbered list, link, and table. A blue question mark icon is next to the editor. At the bottom right of the main content area are three buttons: "Save", "Delete", and "Cancel". At the bottom left, a blue button labeled "Add question" is circled in red. At the bottom right of the entire interface is a blue button labeled "Add section".

Adding an institutional template - add question (2)

- ▶ to add a question, enter the following:
 - ▶ **question number** (allows you to order questions within a section)
 - ▶ **text** of the question
 - ▶ **answer format** (and any additional info required for the specified format)
 - ▶ **guidance** (question-specific)
 - ▶ **theme(s)** associated with the question (to pull in themed guidance)

Adding an institutional template - add question (3)

Question number	<input type="text" value="1"/>		
Question text	<div></div>		
Answer format	<div>Text area</div>	<div>?</div>	
Default answer	<div><div><div><div>B</div><div><i>I</i></div><div><div><div></div><div></div><div></div></div></div><div><div><div></div><div></div><div></div></div></div><div><div><div></div><div></div><div></div></div></div><div><div><div></div><div></div><div></div></div></div><div><div><div></div><div></div><div></div></div></div><div><div><div></div><div></div><div></div></div></div><div><div><div></div><div></div><div></div></div></div></div></div><div></div></div>	<div>?</div>	
Suggested answer/ Example	<div>Example of answer</div> <div></div>	<div>?</div>	
Guidance	<div><div><div><div>B</div><div><i>I</i></div><div><div><div></div><div></div><div></div></div></div><div><div><div></div><div></div><div></div></div></div><div><div><div></div><div></div><div></div></div></div><div><div><div></div><div></div><div></div></div></div><div><div><div></div><div></div><div></div></div></div><div><div><div></div><div></div><div></div></div></div><div><div><div></div><div></div><div></div></div></div></div></div><div></div></div>	<div>?</div>	
Themes	<div>None Confidentiality Data Capture Methods Data Description</div>	<div>?</div>	

Save

Cancel

Adding an institutional template - add question (4)

- ▶ You have a choice of different answer formats:
 - ▶ **text area**: large text box for paragraphs (default style possible - e.g. a table)
 - ▶ **text field**: for a short answer (default style possible)
 - ▶ **checkboxes**: options presented in a list, multiple options can be selected
 - ▶ **radio buttons**: options presented in a list, only one can be selected
 - ▶ **dropdown**: options presented in scrollable menu, only one can be selected
 - ▶ **multiple select box**: options presented in scrollable menu, multiple can be selected using CTRL key

Adding an institutional template - preview template (1)

- ▶ save questions after adding them
- ▶ under “Versions”, select “Preview” to get a sense of what your template will look like to end users

Versions

A first version is created automatically. If you want to make major changes to published versions later (e.g. add section or questions) please create a new version. If you only want to fix typos or make small changes that do not alter meanings, edit the current version.

Title	Published	Created at	Last updated	Actions
UGent DMP v.1	false	27-06-2017	27-06-2017	View Edit Preview

Adding an institutional template - preview template (2)

UGent DMP

[Back to edit view](#)[View all templates](#)

Template details

UGent DMP

Add new phase +

Data Collection

What data will you collect or create?

Save

Not answered yet

UGent Guidance

Questions to consider:

- What types, formats and volume of data?
- Are your chosen file formats best suited for data collection/creation and analysis, notably in your field or research?
- Are your chosen file formats suitable for general and long-term usability?
- Do you plan to reuse existing or third-party datasets?

UGent guidance on Data Type

UGent guidance on Data Format

UGent guidance on Data Volumes

UGent guidance on Existing Data

Adding an institutional template - publish template (1)

- ▶ once you are ready to publish your template, first go back to “Version details”
- ▶ tick the “Published” box and save

Versions

A first version is created automatically. If you want to make major changes to published versions later (e.g. add section or questions) please create a new version. If you only want to fix typos or make small changes that do not alter meanings, edit the current version.

Title	Published	Created at	Last updated	Actions
UGent DMP v.1	false	27-06-2017	27-06-2017	View Edit Preview

Version details

Title

UGent DMP v.1

Description

B *I*

Published

☒

Save

Cancel

Adding an institutional template - publish template (2)

- ▶ then go back to the “Template details” tab and click “Edit template details”
- ▶ tick the “Published” box and save

The screenshot shows the 'UGent DMP' interface. At the top, there's a header with 'UGent DMP' and a 'View all templates' button. Below the header, there are tabs: 'Template details' (highlighted with a red circle), 'UGent DMP', and 'Add new phase +'. The 'Template details' tab is active, showing a form with the following fields:

- Title:** UGent DMP
- Description:** A rich text editor with a toolbar (bold, italic, list, link, etc.) and the text 'Test DMP for UGent researchers'.
- Published:** A checkbox that is checked (highlighted with a red circle).
- Created at:** 27-06-2017
- Last updated:** 27-06-2017

At the bottom right, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red circle.

Adding an institutional template - publish template (3)

- ▶ your template will now appear as published in the “Own templates” list

[Templates](#)[Guidance](#)[Organisation details](#)[Users](#)

Templates

Own templates

If you wish to add an institutional template for a Data Management Plan, use the 'create template' button. You can create more than one template if desired e.g. one for researchers and one for PhD students.

Your template will be presented to users within your institution when no funder templates apply. If you want to add questions to funder templates use the 'customise template' options below.

Create a template

Title	Description	Published	Last updated	Actions
UGent DMP	Test DMP for UGent researchers	true	27-06-2017	Edit

Adding an institutional template - publish template (4)

- ▶ to see what the template looks like for end users, go to user interface and choose “Create plan”
- ▶ in the “create plan” wizard, select your organisation
- ▶ the new template now appears in the “Choose a template” menu (if your institution has more than one template)

Create a new plan

Please select from the following drop-downs so we can determine what questions and guidance should be displayed in your plan.

If applying for funding, select your research funder.

Otherwise leave blank.

Name of funder, if applicable.

--Select your funder--

[Not applicable/not listed.](#)

Funder name

To see institutional questions and/or guidance, select your organisation.

You may leave blank or select a different organisation to your own.

Ghent University

[Not applicable/not listed.](#)

Choose a template*

There are a number of possible templates you could use. Please choose one.

Tick to select any other sources of guidance you wish to see.

☐ DCC

Generic DMP

Generic DMP

Faculty of Psychology & Educational Sciences DMP

UGent DMP

Adding an institutional template - publish template (5)

- ▶ if an institution only has one published template, it is automatically selected by the “create plan” wizard when the institution is selected

The screenshot shows the 'Create a new plan' wizard in the DMP ONLINE .BE system. The user is at the 'Create plan' step, where they select a funder and an institution. The 'Université libre de Bruxelles' is selected in the institution dropdown, and the 'ub-test-template' is selected in the template dropdown. The 'Create plan' button is highlighted with a red circle. A red arrow points from the 'ub-test-template' dropdown to a 'Confirm plan details' dialog box. The dialog box shows the selected details: Funder: None, Institution: Université libre de Bruxelles, Template: ub-test-template, and Other guidance: None. The 'Yes, create plan' button is highlighted with a red circle. Another red arrow points from the 'Yes, create plan' button to the 'My project (ub-test-template)' page. This page shows the project details, including the project name 'My project (ub-test-template)', grant title, principal investigator 'Myrland Martens', and plan data contact information.

Confirm plan details

Funder: None
Institution: Université libre de Bruxelles
Template: ub-test-template
Other guidance: None

Cancel Yes, create plan

My project (ub-test-template)

Plan details GRANT DMP Share Export

Please fill in the basic project details below (place your cursor in the fields for more information) and click 'Update' to save

Project name: My project (ub-test-template)
ID:
Grant title:
Principal Investigator/Researcher: Myrland Martens
Principal Investigator/Researcher ID: 0000-0001-9412-0103
Plan data contact:
Description:

Update Cancel

Editing a published template

- ▶ go to template's Phase tab in the admin area
- ▶ choose to "Edit" the existing version
- ▶ when prompted, indicate whether you want to make small or big changes
- ▶ big changes (e.g. adding questions) require creating a new version

UGent DMP	Test DMP for UGent researchers	true	27-06-2017	Edit
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UGent DMP

Template details **UGent DMP** Add new phase +

Phase details Edit phase details

Here you set the title that users will see. If you intend to have multiple phases for you DMP, this should be clear in the title and description.

Title	UGent DMP
Order of display	1
Description	This is a template for UGent researchers not writing a DMP for a particular funder.

Versions

A first version is created automatically. If you want to make major changes to published versions later (e.g. add section or questions) please create a new version. If you only want to fix typos or make small changes that do not alter meanings, edit the current version.

Title	Published	Created at	Last updated	Actions
UGent DMP v.1	true	27-06-2017	27-06-2017	View Edit Preview

Edit alert

Please consider the kind of changes you are about to make as this plan is already published and might be in use

[Make small changes](#) [Make big changes](#)

Customising funder templates

- ▶ go to the “Templates” menu
- ▶ under “Funders templates”, go to the desired funder template and click “Customise”

Funders templates

Title	Description	Published	Last updated	Actions
AHRC Template	The AHRC template	false	04-08-2015	Edit customisation
Horizon 2020 FAIR DMP	The Horizon 2020 FAIR DMP template, based on the EC's <i>Guidelines on FAI...</i> (continued)	true	11-10-2016	Customise
Horizon 2020 DMP	The Horizon 2020 DMP template, based on the EC's <i>Guidelines on Data...</i> (continued)	false	11-10-2016	Customise

Customising funder templates - add answer

- ▶ click the Phase tab and scroll down to the Sections
- ▶ to add an answer, open up a section and click “Add suggested answer/example”
- ▶ select “Example of answer” or “Suggested answer”, insert your text and save

The screenshot displays the 'Horizon 2020 FAIR DMP' interface. At the top, a 'View all templates' button is visible. Below it, the 'Template details' section shows 'Horizon 2020 FAIR DMP' circled in red. The 'Phase details' section lists the template's title and description. The 'Version information' section includes a '1. Data summary' tab and a '2.1 FAIR data: Making data findable, including provisions for metadata' section. A red arrow points from the 'Add suggested answer/ example' button at the bottom to the 'Suggested answer/ Example' input field in the '2.1 FAIR data' section. The '2.1 FAIR data' section also features a 'Save' button circled in red.

Horizon 2020 FAIR DMP

View all templates

Template details

Horizon 2020 FAIR DMP

Phase details

Title	Horizon 2020 FAIR DMP
Order of display	1
Description	The European Commission is running a flexible pilot under Horizon 2020 c (ORD pilot). A DMP is required for all projects participating in the extended opt out of the ORD pilot. However, projects that opt out are still encourage

Version information

1. Data summary

2.1 FAIR data: Making data findable, including provisions for metadata

Question number	1	UGent guidance
Question text	Are the data produced and/or used in the project discoverable with metadata?	
Default value		
Answer format	Text area	
Guidance		
Themes	Discovery by Users , Metadata	

Suggested answer/ Example

Example of answer

Save Cancel

Add suggested answer/ example

Customising funder templates - add section

- ▶ to add your own section, scroll down and click “Add section” below the existing sections
- ▶ to insert new sections and questions, proceed in the same way as when you create an institutional template

The screenshot shows a user interface for customizing funder templates. On the left is a vertical list of sections: 'Version Information', '1. Data summary', '2.1 FAIR data: Making data findable, including provisions for metadata', '2.2 FAIR data: Making data openly accessible', '2.3 FAIR data: Making data interoperable', '2.4 FAIR data: Increase data re-use (through clarifying licenses)', '3. Allocation of resources', '4. Data security', '5. Ethical aspects', and '6. Other issues'. Each section from 2.4 onwards has a small '+' icon on its right side. At the bottom of this list is a blue button labeled 'Add section', which is circled in red. A red arrow points from this button to a larger dialog box on the right. The dialog box has a title bar 'New section title' and a close button. Inside, there is a field for 'Order of display' with the value '11' and a dropdown arrow, and a larger field for 'Description' with a rich text editor toolbar (containing bold, italic, bulleted list, numbered list, link, unlink, and table icons) and a text area. At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

The end!